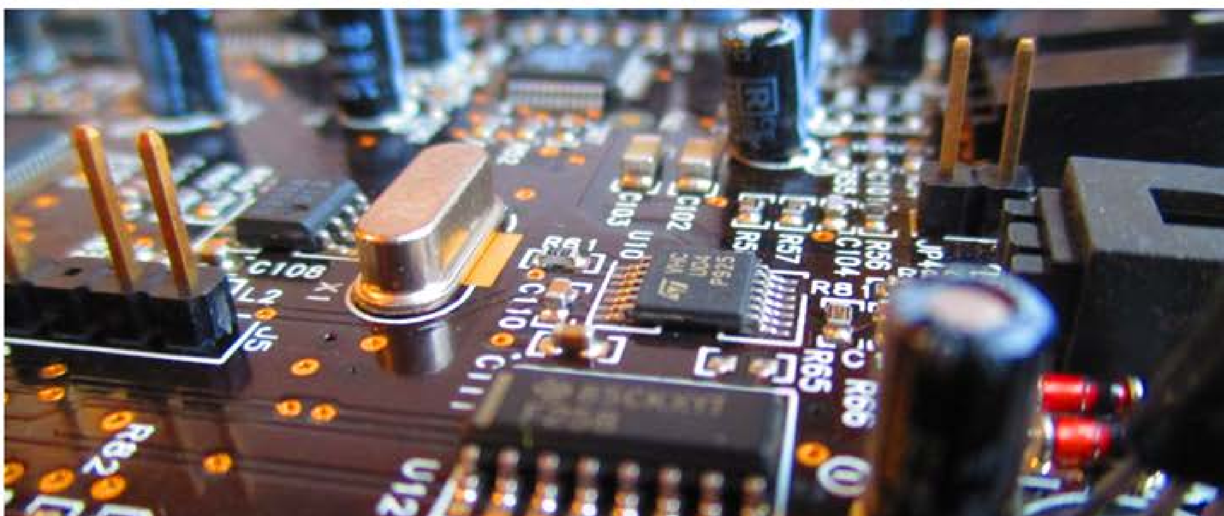
Southwest Alberta Regional Skills Study
Technical Document



September 2020

Funded by:

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1. Introduction

This technical report has been formulated as a support document for the *Southwest Alberta Skills Study*. This project incorporated multiple inputs that validated the strategic directions and recommendations that are shared in the final Strategic Plan.

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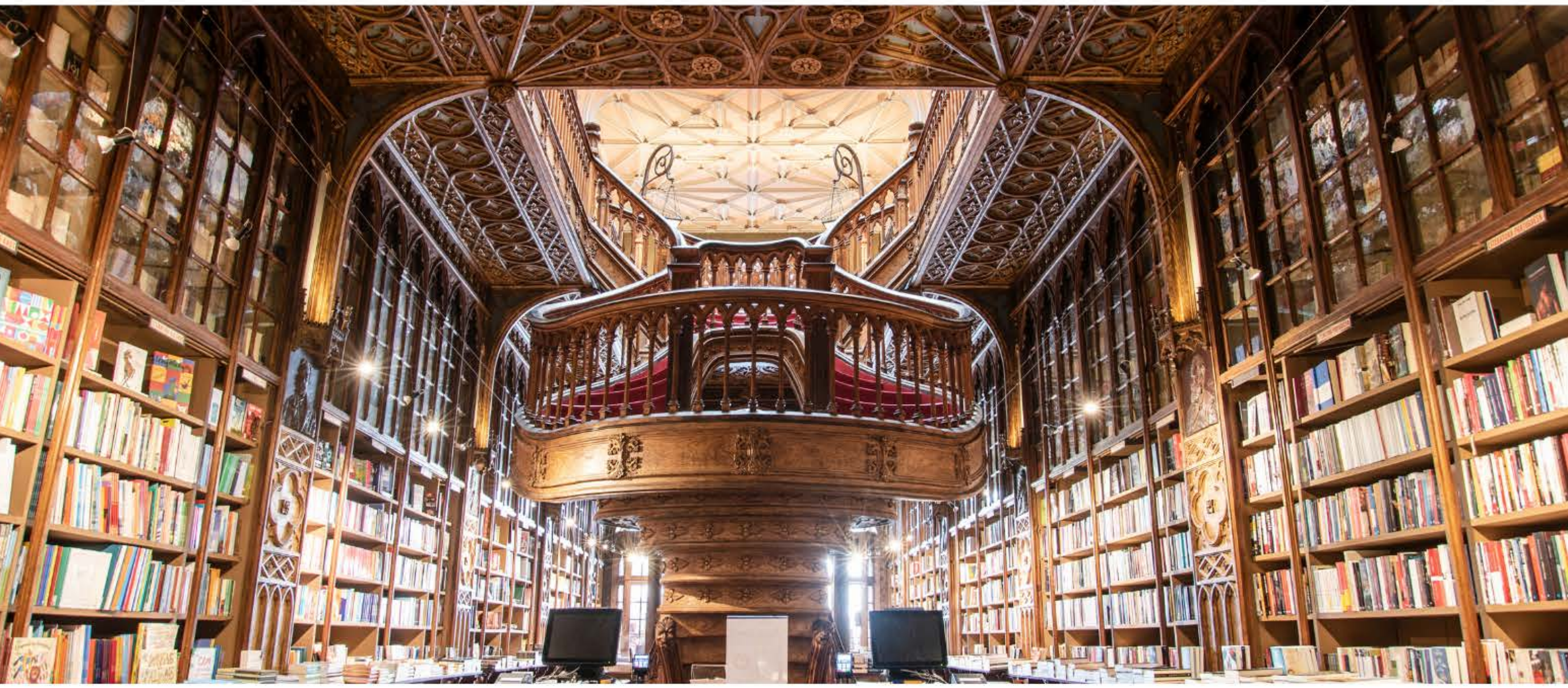


SOUTHWEST ALBERTA REGIONAL SKILLS GAP STUDY

PHASE 1 REPORT

MARCH 2020

Contents

1. Purpose of Report

The Phase 1 report includes a Background Review, Situation Analysis and Labour Profile for the Study Area as a whole, providing the base statistical framework required to complete the next phases of the project. The data presented here supports the identification of skills gaps that will be further explored through research and engagement, directing the next phase of the project.

2. Economic Base Line Analysis

2.1 Background

This economic base analysis presents an overview of the socio-economic, labour force and industry composition in the following Geographies:

- City of Lethbridge
- Town of Taber
- Town of Cardston
- Town of Fort MacLeod
- Vulcan County
- Southwest Alberta *(formed by Cardston County; Improvement District No. 4 Waterton; Cardston; Glenwood; Hill Spring; Pincher Creek No. 9; Pincher Creek; Cowley; Willow Creek No. 26; Fort MacLeod; Granum; Claresholm; Stavely; Nanton; Crowsnest Pass; Ranchland No. 66)*
- SouthGrow Region *(formed by Warner County No. 5; Coutts; Milk River; Warner; Raymond; Stirling; Lethbridge; County; Lethbridge; Coalhurst; Nobleford; Barons; Coaldale; Taber; Taber MD; Barnwell; Vauxhall; Cardston County; Magrath; Cardston; Claresholm; Blood 148; Vulcan County; Carmangay; Champion; Vulcan; Lomond; Milo; Arrowwood)*
- Study Area (All of the above geographies)
- Province of Alberta

The results are derived from the following sources:

- Statistics Canada, Census Profile, 2016
- Statistics Canada, Census Profile, 2011
- Statistics Canada, Canadian Business Counts, December 2018
- Manifold Data Mining Inc.

2.1.1 Demographic portrait

According to Manifold Data Mining Inc., in 2018, the total population of the Study Area was approximately 206,271 people. Most of the people in the area are concentrated in the City of Lethbridge, which accounted for over 50% of the region's population. By 2018, the Study Area region's population represented 5% of Alberta's population.

In terms of population projections, Manifold Data Mining projects that in 2028 the Study Area Region will increase its population by 21%; this represents an increase of 44,569 people. More than half of this growth will take place in the City of Lethbridge; this city is projected to add 22,718 new residents in the next ten years. The regional growth will be similar to the one expected for the province at 24%.

From the communities showcased in this report, Fort MacLeod's is the only population projected to decrease. The community's population is expected to reduce by 8%, losing a total of 251 residents in the upcoming ten years.

Figure 1: Total population and population projections, 2018-2028

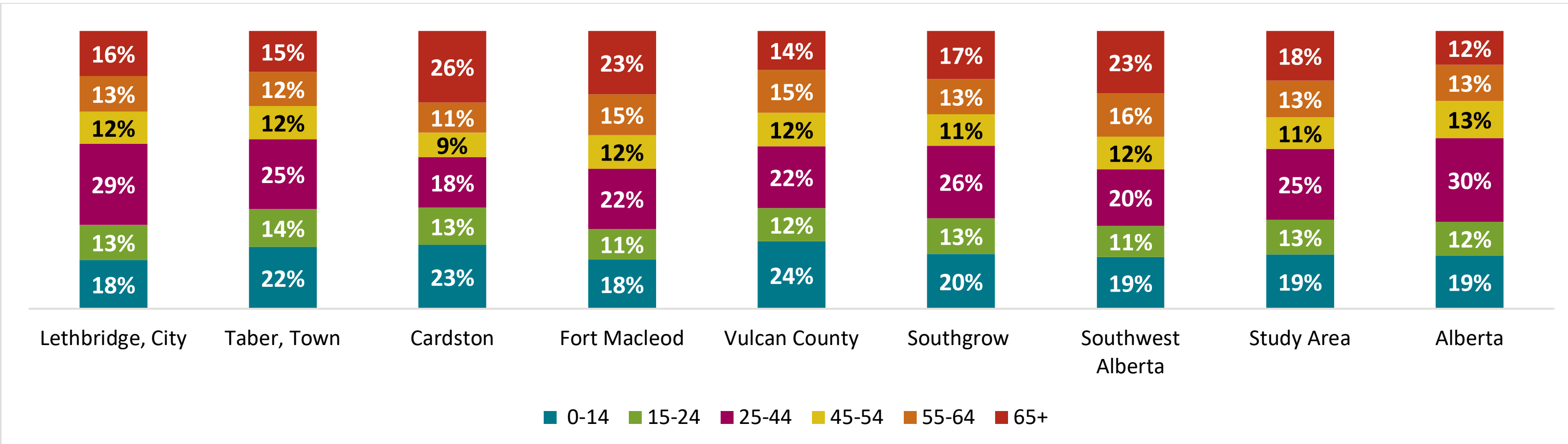
Year	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
2018 Total population	100,551	8,903	3,731	3,026	4,190	179,137	39,603	206,271	4,417,880
2023 Total population	111,446	9,255	3,739	2,894	4,305	198,669	41,435	227,253	4,925,270
2028 Total population	123,269	9,604	3,745	2,775	4,416	219,991	43,379	250,136	5,490,940
10-year net change	22,718	701	14	-251	226	40,854	3,776	43,865	1,073,060
10-year % change	23%	8%	0.4%	-8%	5%	23%	10%	21%	24%

Source: Manifold Data Mining Inc.

Age distributions (see figure below), evidences that the population of the Study Area is relatively young, around 59% of the region's residents are below 44 years of age, and 70% are under 55 years of age. This growing scenario represents an opportunity, as most of the country will face a shortage of labour force due to the ageing population.

Among comparators, Cardston and Fort MacLeod recorded the most significant percentage of its population over 55 years old, over 7% of the Study Area's share, and over 12% of the provincial share.

Figure 2: Age characteristics, percentage of the overall population – 2018



Source: Manifold Data Mining Inc.

2.1.2 Dwelling Characteristics

Most of the housing in the Study Area are single-detached houses, followed by apartment buildings that have fewer than five storeys. The share of people living in single-detached houses is higher in the Study Area compared to the province. This share is even higher in Southwest Alberta, where the percentage of people living in single-detached houses reached 81%.

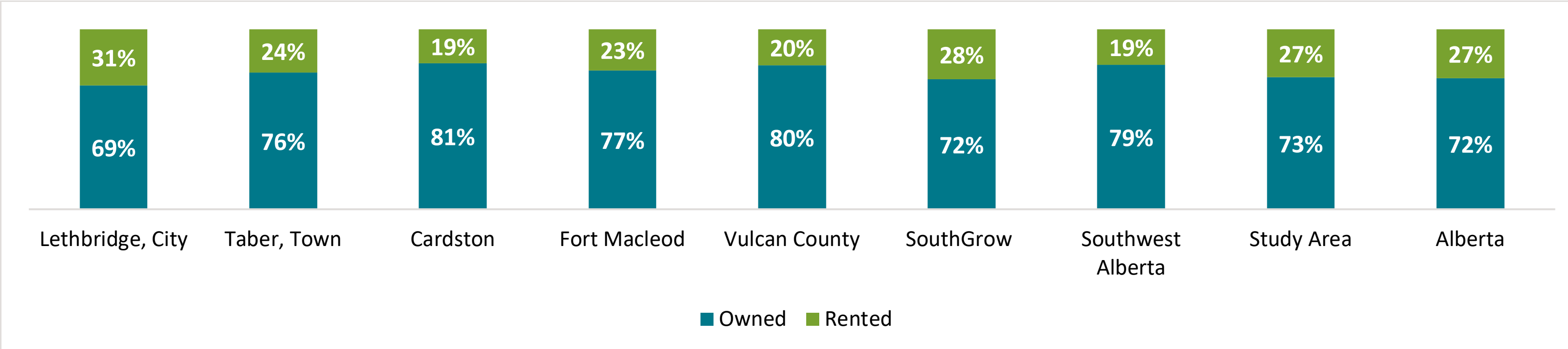
Figure 3: Occupied dwellings by type, percentage of the overall population, 2018

Type of Dwelling	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Single-detached house	63%	72%	90%	79%	92%	69%	81%	71%	62%
Apartment, building that has five or more storeys	2%	0%	0%	2%	0%	1%	0%	1%	4%
Movable dwelling	2%	4%	0%	10%	7%	5%	7%	5%	3%
Semi-detached house	6%	6%	2%	2%	1%	5%	2%	5%	6%
Apartment, detached duplex	8%	3%	1%	1%	0%	5%	1%	4%	3%
Row house	6%	2%	6%	3%	0%	4%	2%	4%	8%
Apartment, building that has fewer than five storeys	14%	12%	2%	4%	0%	8%	0%	7%	15%
Other single-attached house	0%	0%	0%	0%	0%	0%	0%	0%	0%

Source: Manifold Data Mining Inc.

In the Study Area, most of the dwelling is occupied by owners; the share of people renting dwellings represent a 26%, similar to the provincial share of renters. The City of Lethbridge recorded the largest share of renters among comparators at 31%.

Figure 4: Occupied dwellings by type, percentage of the overall population, 2018



Source: Manifold Data Mining Inc.

According to the Government of Alberta Regional Dashboard, 19 of the communities in the Study Area recorded a total of 2,168 building permits during 2018 for a total value of $553.3 million; this represented an increase of 68.8% in the number of building permits compared to the prior year[1].

Figure 5 shows the median value of dwellings is higher is Vulcan County compared to the rest of geographies, followed by the city of Lethbridge. Overall the median value of dwellings in the Study Area is lower than the provincial median. In terms of rent, the Study Area recorded a median monthly rent of $984; this value is lower than the provincial median cost of rented dwellings. Among the comparators, the city of Lethbridge registered the highest median monthly price of rent, followed by Vulcan County.

Figure 5: Median dwelling and shelter costs of dwellings, 2018

Period	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Median value of dwellings 2018 ($)	332,266	272,552	282,800	236,342	376,320	270,049	265,485	267,767	482,306
Median monthly rent 2018 ($)	1,056	943	915	944	983	1,023	945	984	1,259

Source: Manifold Data Mining Inc.

[1] Included communities: City of Lethbridge; Lethbridge County; Taber; Coaldale; Cardston County; Vulcan County; Warner County No. 5; Claresholm; Raymond; Coalhurst; Magrath; Vulcan; Noblefort; Vauxhall; Stirling; Milk River; Warner; Champion; Carmangay.

2.1.3 Income

Population Income

In 2018, the median population income in the Study Area reached $36,948, almost $11,000 lower than the province. Among the comparators, Vulcan County recorded the most considerable median population income at $43,919.

In terms of income growth, not all the communities recorded median income data due to the unavailability of data. However, the available data shows significant income growth in the city of Lethbridge and the town of Taber. Nevertheless, this growth is still smaller than the provincial gains at 31%.

Figure 6: Median total population income 2010-2018

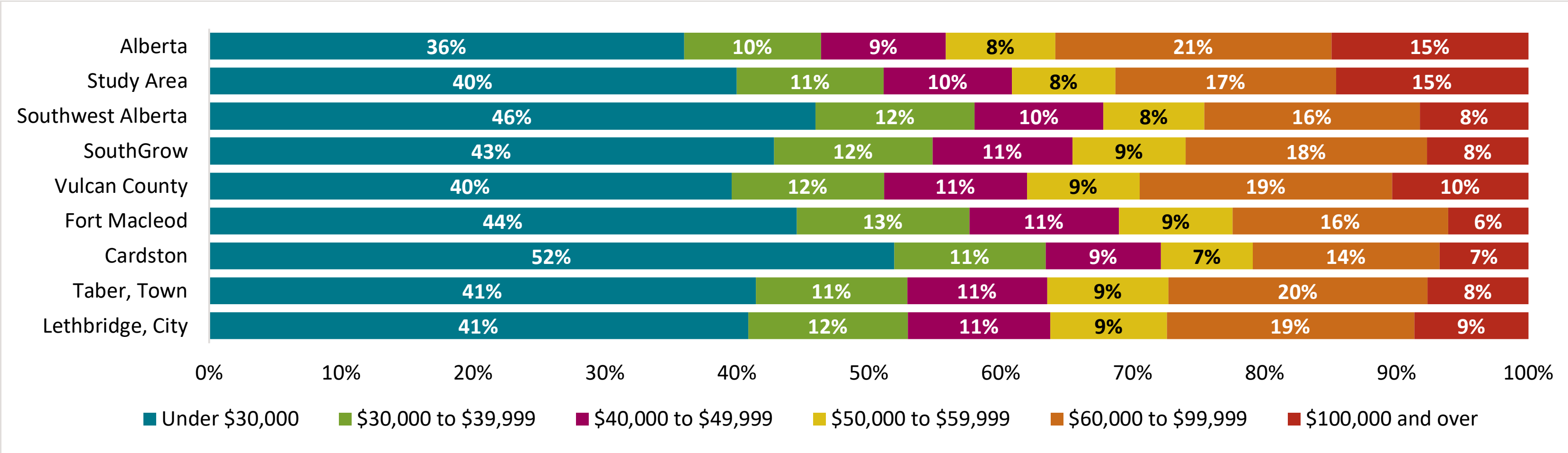
Period	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
2018 ($)	39,650	39,422	31,141	36,657	43,919	38,723	35,173	36,948	47,572
2010 ($)	31,151	31,354	*Not available*	*Not available*	*Not available*	30,506	27,718	29,112	36,306
% change	27%	26%	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	31%

Source: Statistics Canada, 2011 National Household Survey | Manifold Data Mining Inc.

Note: Highlighted figures have been calculated using data from limited communities. Do not use for income growth analysis

Moving to the subject of the income distribution, in 2018, the largest portion of the population in the Study Area received an income under $30,000. Among comparators, Cardston recorded the largest share of people with income under $30,000. There is also an evident income inequality in these geographies, with a relatively low percentage of people making more than $100,000.

Figure 7: Population income distribution, percentage of the overall population, 2018



Source: Manifold Data Mining Inc.

Household Income

In 2018 the Study Area recorded a median household income of approximately $75,336, just over $27,000 lower than the Alberta median.

Among communities, Vulcan County and the Town of Taber recorded the most substantial median household incomes. However, these median incomes are still below the provincial threshold. In terms of income growth, the Town of Taber recorded the most significant increase at 30%, the same as the provincial growth.

Figure 8: Median total household income 2010-2018

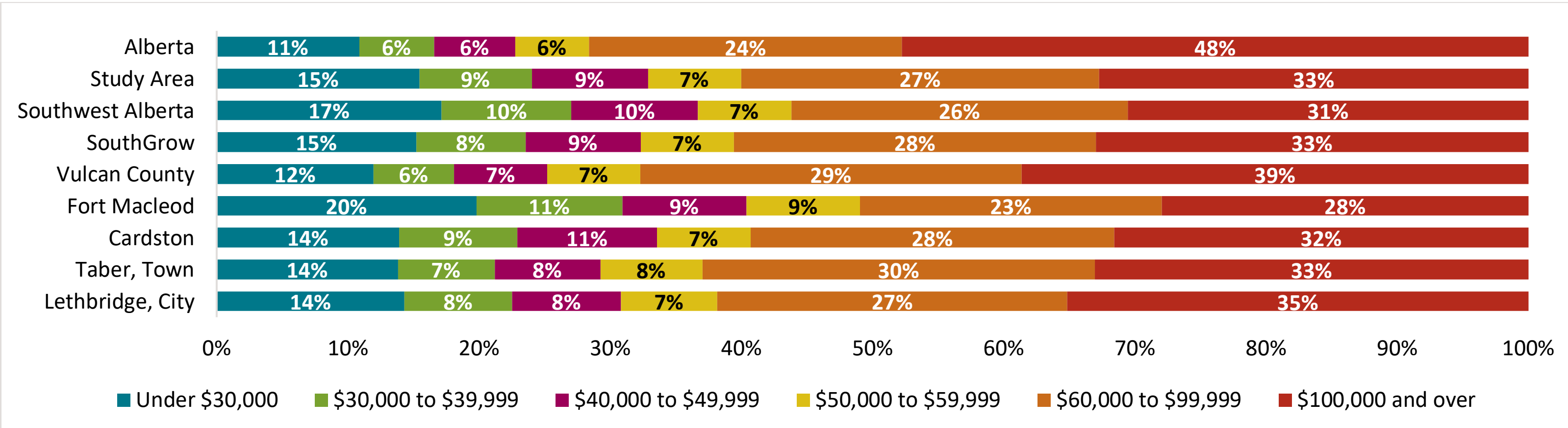
Period	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
2018 ($)	76,311	77,093	72,309	69,466	90,031	78,637	72,035	75,336	102,378
2010 ($)	62,298	59,467	Not available	Not available	Not available	62,924	61,045	61,985	78,632
% Change	22%	30%	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	30%

Source: Statistics Canada, 2011 National Household Survey | Manifold Data Mining Inc.

Note: Highlighted figures have been calculated using data from limited communities. Do not use for income growth analysis

In terms of income distribution, most of the households in all the geographies analyzed received more than $100,000. However, all the communities fall far behind the province of Alberta. On the opposite, low-income households represented more than 10% of the population in all the geographies. According to Statistics Canada, and given the size of the communities, any household income under $30,000 is under the Low-income Cut-off threshold[2]; this limits the availability of disposable income, which impacts local economies as it limits the availability of some residents to participate more actively in the local economy.

Figure 9: Household income distribution, percentage of the overall population, 2018



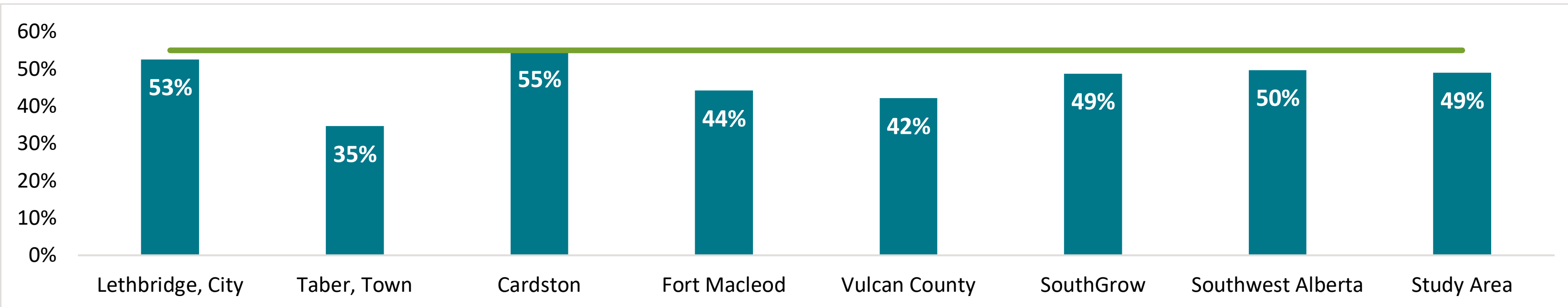
Source: Manifold Data Mining Inc.

[2] Statistics Canada. Table 11-10-0241-01 Low income cut-offs (LICOs) before and after tax by community size and family size, in current dollars

2.1.4 Education

Education attainment is a vital descriptor of labour force capacity. The figure below summarizes skilled labour proportions for comparator areas, which is composed of those people that have completed an apprenticeship, trade certificate, or college or university degree, diploma or certificate. In 2018, approximately 49% of the population 15 years and older in the Study Area had a post-secondary certificate, diploma or degree. Cardston recorded the largest share of people 15 years and older with a post-secondary certificate diploma or degree at 55%, similar to the province of Alberta at the same rate.

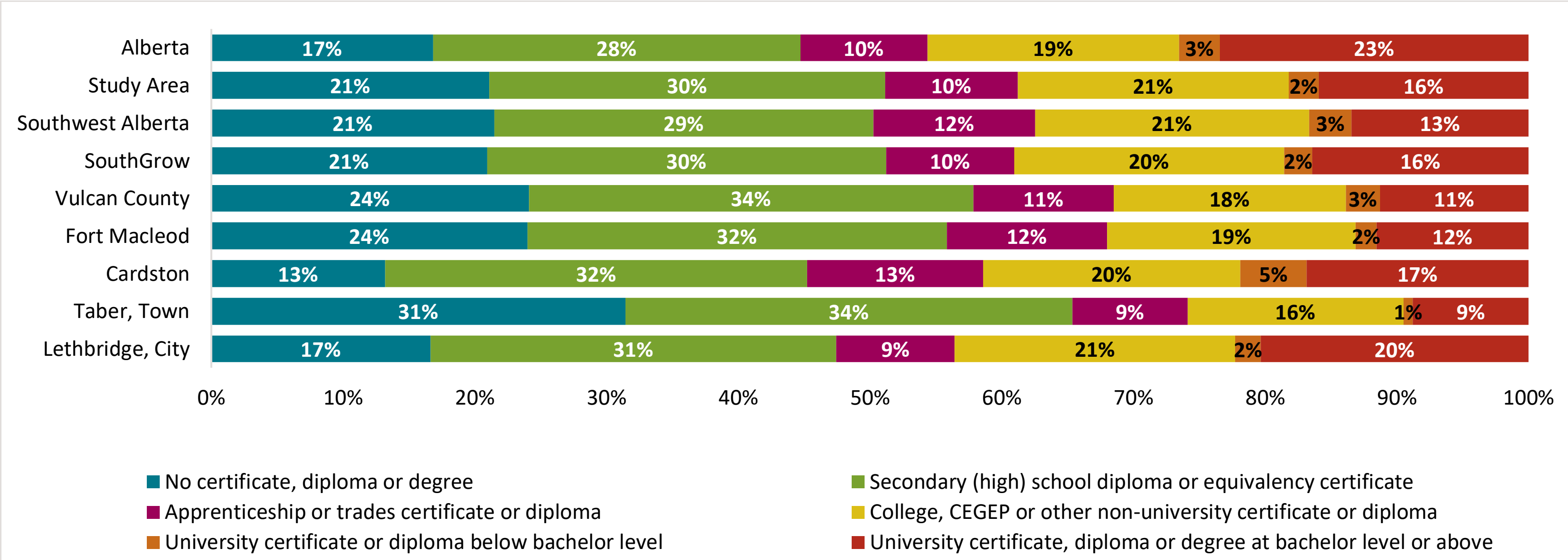
Figure 10: Proportion of population (15 years and over) with post-secondary or apprenticeship education (skilled labour), 2018



Source: Manifold Data Mining Inc.

Figure 11 shows that, for the most part, people in all geographies completed at least high school. In terms of university education, the city of Lethbridge recorded the largest share of people 15 and older with university education at the bachelor level or above; this might be the result of the city being home of the University of Lethbridge.

Figure 11: Highest level of education attainment (15 years and over), % of the population, 2018



Source: Manifold Data Mining Inc.

Most of the people (15 years and over) in all the geographies had a degree in architecture, engineering and related technologies, health and related fields, and business, management and public administration. The percentage of people with no post-secondary certificate, diploma or degree is higher in all comparators compared to the province.

Figure 12: Major field of study (15 years and over), percentage of the population, 2018

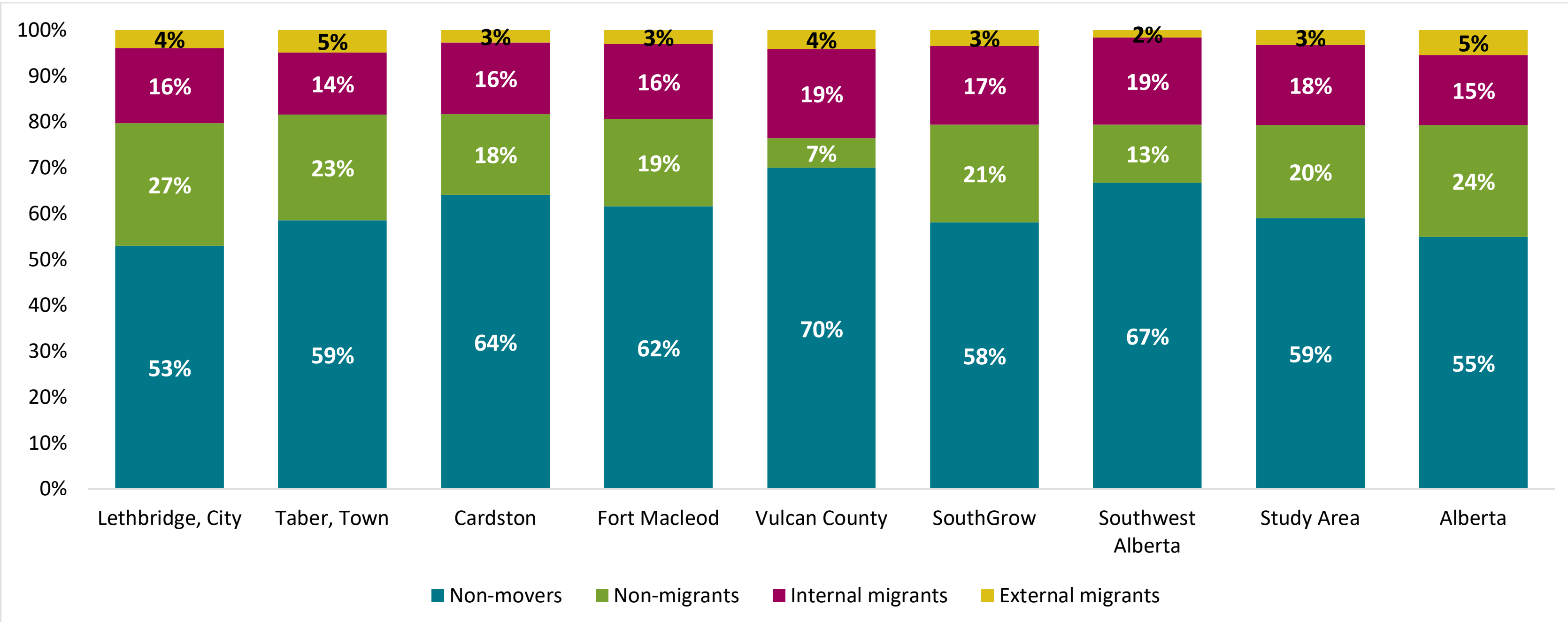
Field of Study	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
No postsecondary certificate, diploma or degree	47%	65%	45%	56%	58%	51%	49%	50%	44%
Education	4%	3%	8%	5%	3%	4%	5%	4%	4%
Visual and performing arts, and communications technologies	2%	1%	2%	1%	0%	2%	2%	2%	2%
Humanities	2%	1%	1%	2%	1%	2%	2%	2%	2%
Social and behavioural sciences and law	5%	2%	3%	3%	2%	4%	3%	4%	5%
Business, management and public administration	10%	6%	9%	7%	9%	9%	8%	9%	11%
Physical and life sciences and technologies	2%	1%	2%	0%	1%	2%	1%	2%	2%
Mathematics, computer and information sciences	2%	0%	1%	1%	0%	1%	1%	1%	2%
Architecture, engineering, and related technologies	10%	9%	10%	12%	11%	10%	12%	10%	14%
Agriculture, natural resources and conservation	2%	2%	2%	1%	5%	2%	3%	3%	2%
Health and related fields	10%	7%	13%	11%	9%	9%	10%	9%	8%
Personal, protective and transportation services	4%	3%	3%	3%	2%	4%	4%	4%	3%
Other fields of study	0%	0%	0%	0%	0%	0%	0%	0%	0%

Source: Manifold Data Mining Inc.

2.1.5 Mobility

The movement of people within a community or to the community from somewhere else constitutes mobility. Statistics Canada tracks this in two ways, by asking if a household has moved within the past year and asking if a household has moved within the past five years. According to Manifold Data Mining calculations, most people in all the geographies analyzed had either stayed where they were five years earlier or moved somewhere in the same geography. By 2018, Vulcan County recorded the largest share of migrants at almost 24%.

Figure 13: Mobility characteristics five years ago, 2018



Source: Manifold Data Mining Inc.

2.1.6 Labour Force

According to the standard definition employed by Statistics Canada, the employed are persons having a job or business. In contrast, the unemployed are without work, are available for work, and are actively seeking employment. Together the unemployed and the employed constitute the labour force[3]. In 2018, a total of 108,2981 people in the Study Area were participating in the labour force; this represents almost 4% of Alberta's labour force. Due to data limitation in several of the communities in the study, labour force growth calculations were only possible for the city of Lethbridge, the Town of Taber and the province. The first two communities experienced a labour force growth of 19% and 7%, respectively; both communities grew below the increase experienced by Alberta at 21%.

Figure 14: Labour force size, 2011-2018

Period	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Labour force 2018	57,163	4,751	1,583	1,456	2,172	94,669	19,551	108,281	2,559,960
Labour force 2011	47,960	4,425	Not available	Not available	Not available	72,785	9,420	80,455	2,115,640
% Change	19%	7%	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	21%

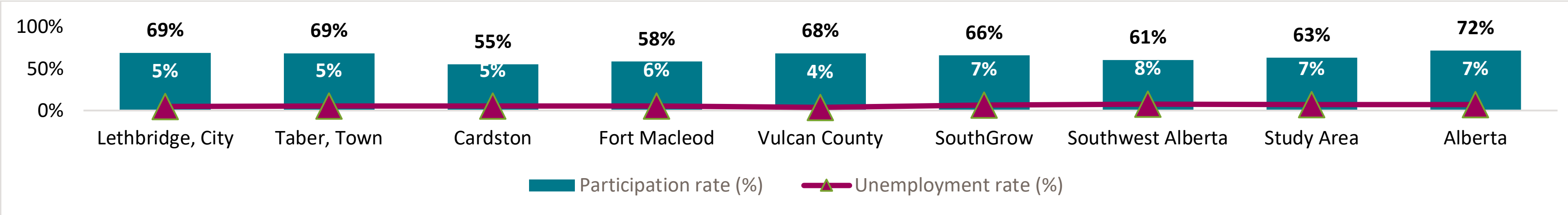
Source: Statistics Canada, 2011 National Household Survey | Manifold Data Mining Inc.

Note: Highlighted figures have been calculated using data from limited communities. Do not use for labour growth analysis

In 2018, participation rates in the SouthGrow Region and Southwest Alberta reached 66% and 61%, respectively. All comparators were below the provincial participation rate at 72%. In terms of the unemployment rate, most of the census subdivisions used as comparators recorded lower unemployment rated compared to the broader areas (SouthGrow, Southwest Alberta, Alberta). Vulcan County recorded the lowest unemployment rate in 2018 at 4%.

[3] Statistics Canada. Retrieved on January 7, 2019 from < https://www150.statcan.gc.ca/n1/pub/81-004-x/def/4153361-eng.htm>

Figure 15: Labour force status, percentage of population, 2018



Source: Manifold Data Mining Inc.

Turning to the class of worker, over 85% of the labour force in the Study Area work as employees. Nevertheless, in Vulcan County, 39% of the labour force work self-employed; this is more than three times the provincial share.

Figure 16: Class of worker ratio, 2018

	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Employees	89%	87%	84%	86%	60%	85%	78%	85%	86%
Self-employed	10%	12%	14%	12%	39%	13%	20%	15%	12%

Source: Manifold Data Mining Inc.

2.1.7 Commuting Patterns

The Study on commuting patterns measures the import and export characteristics of a region's workforce. A high percentage of the outside labour force working in the community depicts the attraction of the region for nearby communities. In contrast, if the majority of the workers in the community leave for their work (export of labour force), then it may hint towards a lack of proportional opportunities in the community.

In the Study Area, most of the employed labour force commutes within the same census subdivision of residence (e.g. people living and working in the city of Lethbridge). The share is lower for Southwest Alberta at 50%, for this area, 25% of the employed labour force commute to a different census subdivision within the same census division (e.g. people with residence in the Town of Taber and work in the city of Lethbridge. Both communities located within Division No. 2).

Vulcan County recorded the largest share of the labour force (44%) who commute to a different census subdivision and census division (e.g. people with residence in Vulcan who work in Stavely. One community located in Division No. 5, and the other located in Division No. 3).

Figure 17: Commuting destination for the employed labour force

Journey to work	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Commute within census subdivision (CSD) of residence	87%	75%	77%	67%	14%	71%	50%	68%	73%
Commute to a different census subdivision (CSD) within census division (CD) of residence	9%	23%	15%	11%	41%	23%	25%	23%	22%
Commute to a different census subdivision (CSD) and census division (CD) within province or territory of residence	3%	2%	7%	21%	44%	6%	19%	7%	4%
Commute to a different province or territory	1%	0%	0%	1%	1%	1%	5%	1%	1%

Source: Statistics Canada. 2016 Census

While the labour force by industry data provides information on the type of industry where a community's population is employed, it does not indicate if the labour force is employed in industries within the community or if they commute outside the community to work. The commuting patterns indicate where the community's labour force lives and works.

In Figures 1, 4, 7, 10 and 12, the first column indicates the resident of the community is working in the community. The second column (indicated as A in the table) indicates the number of residents 'working outside' community while the third column (indicated as B in the table) indicates the number of jobs held by non-residents working in the community. When interpreting the table, if (B-A) is positive, it suggests a community is a net importer of workers; more people commute into the community to work in it than leave it. Conversely, if (B-A) is negative, it indicates a community is a net exporter of workers; more people leave the community to work than enter it for work.

Lethbridge

Approximately 33,865 residents work in Lethbridge. Most of these residents perform jobs in Lethbridge's health care and social assistance, retail trade and accommodation and food services. Approximately 5,125 Lethbridge residents work outside Lethbridge (A). Resident's travel to communities outside Lethbridge to work in their manufacturing, public administration and educational services sectors. Lethbridge attracts approximately 6,940 people from outside communities (B). Health care and social assistance, retail trade and manufacturing sectors are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, Lethbridge is a net importer of workers. While commuter outflow accounts for 5,125 residents, commuter inflow represents 6,940 people. Lethbridge has a net import of 1,815 workers. The industries that import the most workers from other communities include health care and social assistance, retail trade and accommodation and food services.

Figure 18: Net Export (-)/Net Import (+) of Labour by Industry, Lethbridge 2016

Industry	Live and Work in Lethbridge	Live in Lethbridge Commute to other community (A)	Commute to Lethbridge, Live in Other Community (B)	Net import/export
Total	33,865	5,125	6,940	1,815
Agriculture, forestry, fishing and hunting	320	355	130	-225
Mining, quarrying, and oil and gas extraction	60	280	0	-280
Utilities	170	35	90	55
Construction	1480	285	515	230
Manufacturing	2885	735	655	-80
Wholesale trade	880	320	315	-5
Retail trade	5745	295	945	650
Transportation and warehousing	740	300	255	-45
Information and cultural industries	455	0	80	80
Finance and insurance	1120	70	205	135
Real estate and rental and leasing	495	10	115	105
Professional, scientific and technical services	1505	200	345	145
Management of companies and enterprises	30	10	20	10
Admin. and support, waste mgmt. and remediation services	945	100	170	70
Educational services	3555	535	520	-15
Health care and social assistance	5825	480	1340	860
Arts, entertainment and recreation	625	145	120	-25
Accommodation and food services	3450	115	455	340
Other services (except public administration)	1790	150	405	255
Public administration	1795	635	380	-255

Source: Statistics Canada, 2016 Census of Population.

The majority of residents' commute to work in Lethbridge County (42% of the commuting workforce), followed by Coaldale (10% of the commuting workforce) and the Town of Taber (7.92% of the commuting workforce).

Figure 19: Place of Work for Residents of Lethbridge 2016

Communities	Number of Residents	% of the total
Commuting Workforce	5125	100%
Lethbridge County MD	2170	42%
Coaldale T	535	10%
Taber T	275	5%
Calgary CY	210	4%
Fort MacLeod T	195	4%

Source: Statistics Canada, 2016 Census of Population.

A large portion of the non-residents who work in Lethbridge are from Coaldale (24% of total) and Lethbridge County (20% of total) and Coalhurst (10% of total).

Figure 20: Place of Residence for Workers who Commute to Lethbridge to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	6940	100%
Coaldale T	1655	24%
Lethbridge County MD	1370	20%
Coalhurst T	695	10%
Raymond T	465	7%
Magrath T	265	4%

Source: Statistics Canada, 2016 Census of Population.

Town of Taber

Approximately 2,365 residents work in the Town of Taber. Most of these residents perform jobs in the Town of Taber's Retail trade, Manufacturing, Health care and social assistance. Approximately 780 of the Town of Taber residents work outside the Town of Taber (A). Resident's travel to communities outside the Town Taber to work in their manufacturing, retail trade and educational services sectors. The Town of Taber attracts approximately 1,275 people from outside communities (B). Manufacturing, educational services and healthcare and social assistance are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, the Town of Taber is a net importer of workers. While commuter outflow accounts for 780 residents, commuter inflow represents 1,275 people. The Town of Taber has a net import of 495 workers. The industries that import the most workers from other communities include health care and social assistance, educational services and manufacturing.

Figure 21: Net Export (-)/Net Import (+) of Labour by Industry, Town of Taber 2016

Industry	Live and Work in Taber	Live in Town of Taber Commute to other community (A)	Commute to Town of Taber, Live in Other Community (B)	Net import/export
Total	2,365	780	1,275	495
Agriculture, forestry, fishing and hunting	90	40	110	70
Mining, quarrying, and oil and gas extraction	80	45	40	-5
Utilities	15	10	10	0
Construction	40	25	35	10
Manufacturing	340	155	210	55
Wholesale trade	130	30	70	40
Retail trade	430	100	110	10
Transportation and warehousing	90	45	60	15
Information and cultural industries	15	20	10	-10
Finance and insurance	25	15	45	30
Real estate and rental and leasing	20	0	10	10
Professional, scientific and technical services	80	10	55	45
Management of companies and enterprises	0	0	0	0
Admin. and support, waste mgmt. and remediation services	45	10	30	20
Educational services	150	90	155	65
Health care and social assistance	250	60	135	75
Arts, entertainment and recreation	15	10	10	0
Accommodation and food services	280	15	50	35
Other services (except public administration)	180	60	90	30
Public administration	105	30	75	45

Source: Statistics Canada, 2016 Census of Population.

The majority of residents commute to work in Taber MD (51% of the commuting workforce), followed by Lethbridge (28% of the commuting workforce) and Lethbridge County (4% of the commuting workforce).

Figure 22: Place of Work for Residents of The Town of Taber 2016

Communities	Number of Residents	% of the total
Commuting Workforce	780	100%
Taber MD	395	51%
Lethbridge CY	220	28%
Lethbridge County MD	35	4%
Bow Island T	30	4%
Coaldale T	25	3%

Source: Statistics Canada, 2016 Census of Population.

A large portion of the non-residents who work in the Town of Taber are from Taber MD (44% of total) and Lethbridge (22% of total) and Coaldale (10% of total).

Figure 23: Place of Residence for Workers who Commute to The Town of Taber to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	1275	100%
Taber MD	555	44%
Lethbridge CY	275	22%
Coaldale T	130	10%
Barnwell VL	115	9%
Vauxhall T	40	3%

Source: Statistics Canada, 2016 Census of Population.

Cardston

Approximately 785 residents work in Cardston. Most of these residents perform jobs in Cardston's retail trade, educational services, health care and social assistance. Approximately 245 Cardston residents work outside Cardston (A). Resident's travel to communities outside Cardston to work in their educational services, public administration and health care and social assistance sectors. Cardston attracts approximately 555 people from outside communities (B). Retail trade educational services and healthcare and social assistance are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, Cardston is a net importer of workers. While commuter outflow accounts for 245 residents, commuter inflow represents 555 people. Cardston has a net import of 310 workers. The industries that import the most workers from other communities include retail trade educational services and healthcare and social assistance.

Figure 24: Net Export (-)/Net Import (+) of Labour by Industry, Cardston 2016

Industry	Live and Work in Cardston	Live in Cardston Commute to other community (A)	Commute to Cardston, Live in Other Community (B)	Net import/export
Total	785	245	555	310
Agriculture, forestry, fishing and hunting	10	10	45	35
Mining, quarrying, and oil and gas extraction	0	0	0	0
Utilities	10	0	0	0
Construction	10	20	40	20
Manufacturing	40	20	20	0
Wholesale trade	10	0	10	10
Retail trade	105	20	60	40
Transportation and warehousing	10	0	0	0
Information and cultural industries	0	0	0	0
Finance and insurance	20	20	10	-10
Real estate and rental and leasing	10	0	10	10
Professional, scientific and technical services	20	10	15	5
Management of companies and enterprises	0	0	0	0
Admin. and support, waste mgmt. and remediation services	30	20	20	0
Educational services	145	25	90	65
Health care and social assistance	185	45	155	110
Arts, entertainment and recreation	15	10	10	0
Accommodation and food services	45	0	10	10
Other services (except public administration)	35	0	35	35
Public administration	65	25	20	-5

Source: Statistics Canada, 2016 Census of Population.

The majority of residents commute to work in Blood 148 IRI (33% of the commuting workforce), followed by Lethbridge (24% of the commuting workforce) and Cardston County (8% of the commuting workforce).

Figure 25: Place of Work for Residents of Cardston 2016

Communities	Number of Residents	% of the total
Commuting Workforce	245	100%
Blood 148 IRI	80	33%
Lethbridge CY	60	24%
Cardston County MD	20	8%
Fort MacLeod T	20	8%
Magrath T	15	6%

Source: Statistics Canada, 2016 Census of Population.

A large portion of the non-residents who work in Cardston are from Cardston County (52% of total) and Lethbridge (14% of total) and Blood 148 (9% of total).

Figure 26: Place of Residence for Workers who Commute to Cardston to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	555	100%
Cardston County MD	290	52%
Lethbridge CY	80	14%
Blood 148	50	9%
Magrath T	30	5%
Calgary CY	15	3%

Source: Statistics Canada, 2016 Census of Population.

Fort MacLeod

Approximately 675 residents work in Fort MacLeod. Most of these residents perform jobs in Fort MacLeod's manufacturing, retail trade and healthcare and social assistance. Approximately 330 Fort MacLeod residents work outside Fort MacLeod (A). Resident's travel to communities outside Fort MacLeod to work in their manufacturing, educational services and health care and social assistance sectors. Fort MacLeod attracts approximately 915 people from outside communities (B). Agriculture, forestry, fishing and hunting, manufacturing and healthcare and social assistance are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, Fort MacLeod is a net importer of workers. While commuter outflow accounts for 330 residents, commuter inflow represents 915 people. Fort MacLeod has a net import of 585 workers. The industries that import the most workers from other communities include retail trade, manufacturing and agriculture, forestry, fishing and hunting.

Figure 27: Net Export (-)/Net Import (+) of Labour by Industry, Fort MacLeod 2016

Industry	Live and Work in Fort MacLeod	Live in Fort MacLeod Commute to other community (A)	Commute to Fort MacLeod, Live in Other Community (B)	Net import/export
Total	675	330	915	585
Agriculture, forestry, fishing and hunting	15	10	135	125
Mining, quarrying, and oil and gas extraction	0	30	10	-20
Utilities	0	0	0	0
Construction	35	20	70	50
Manufacturing	85	40	145	105
Wholesale trade	15	10	20	10
Retail trade	115	10	80	70
Transportation and warehousing	30	10	45	35
Information and cultural industries	20	0	10	10
Finance and insurance	15	20	20	0
Real estate and rental and leasing	10	20	10	-10
Professional, scientific and technical services	15	0	10	10
Management of companies and enterprises	0	0	0	0
Admin. and support, waste mgmt. and remediation services	10	10	30	20
Educational services	50	35	55	20
Health care and social assistance	125	100	100	0
Arts, entertainment and recreation	15	10	25	15
Accommodation and food services	75	20	10	-10
Other services (except public administration)	15	10	50	40
Public administration	30	10	40	30

Source: Statistics Canada, 2016 Census of Population.

The majority of residents commute to work in Lethbridge (35% of the commuting workforce), followed by Claresholm (14% of the commuting workforce) and Lethbridge County (11% of the commuting workforce).

Figure 28: Place of Work for Residents of Fort MacLeod 2016

Communities	Number of Residents	% of the total
Commuting Workforce	330	100%
Lethbridge CY	115	35%
Claresholm T	45	14%
Lethbridge County MD	35	11%
Pincher Creek T	20	6%
Blood 148 IRI	20	6%

Source: Statistics Canada, 2016 Census of Population.

Figure 12 shows the commuting patterns of workers who commute to Fort MacLeod to work. A large portion of the non-residents who work in Fort MacLeod are from Willow Creek No. 26 (33% of total) and Lethbridge (21% of total) and Edmonton (5% of total).

Figure 29: Place of Residence for Workers who Commute to Fort MacLeod to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	915	100%
Willow Creek No. 26 MD	305	33%
Lethbridge CY	195	21%
Edmonton CY	50	5%
Claresholm T	40	4%
Lethbridge County MD	35	4%

Source: Statistics Canada, 2016 Census of Population.

Vulcan County

Approximately 110 residents work in Vulcan County. Most of these residents perform jobs in Vulcan County's agriculture, forestry, fishing and hunting, accommodation and food services and mining, quarrying, and oil and gas extraction sectors. Approximately 690 Vulcan County residents work outside Vulcan County (A). Resident's travel to communities outside Vulcan County to work in their agriculture, forestry, fishing and hunting, manufacturing and health care and social assistance sectors. Vulcan County attracts approximately 175 people from outside communities (B). Agriculture, forestry, fishing and hunting, wholesale trade and educational services are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, Vulcan County is a net exporter of workers. While commuter inflow accounts for 175 residents, commuter outflow represents 690 people. Vulcan County has a net export of 515 workers. The industries that export the most workers to other communities include health care and social assistance, agriculture, forestry, fishing and hunting and manufacturing.

Figure 30: Net Export (-)/Net Import (+) of Labour by Industry, Vulcan County 2016

Industry	Live and Work in Vulcan County	Live in Vulcan County Commute to other community (A)	Commute to Vulcan County, Live in Other Community (B)	Net import/export
Total	110	690	175	-515
Agriculture, forestry, fishing and hunting	55	125	50	-75
Mining, quarrying, and oil and gas extraction	10	20	10	-10
Utilities	0	0	0	0
Construction	0	50	0	-50
Manufacturing	0	75	0	-75
Wholesale trade	0	25	20	-5
Retail trade	0	65	10	-55
Transportation and warehousing	0	30	0	-30
Information and cultural industries	0	0	0	0
Finance and insurance	0	10	10	0
Real estate and rental and leasing	10	20	0	-20
Professional, scientific and technical services	0	50	10	-40
Management of companies and enterprises	0	0	0	0
Admin. and support, waste mgmt. and remediation services	0	0	0	0
Educational services	0	30	30	0
Health care and social assistance	0	105	0	-105
Arts, entertainment and recreation	0	0	0	0
Accommodation and food services	20	50	10	-40
Other services (except public administration)	0	30	0	-30
Public administration	0	25	0	-25

Source: Statistics Canada, 2016 Census of Population.

The majority of residents commute to work in Lethbridge (35% of the commuting workforce), followed by Claresholm (14% of the commuting workforce) and Lethbridge County (11% of the commuting workforce).

Figure 31: Place of Work for Residents of Vulcan County 2016

Communities	Number of Residents	% of the total
Commuting Workforce	690	100%
Vulcan T	190	28%
Calgary CY	120	17%
Nanton T	45	7%
Wheatland County MD	45	7%
Foothills No. 31 MD	40	6%

Source: Statistics Canada, 2016 Census of Population.

A large portion of the non-residents who work in Vulcan County are from Willow Creek No. 26 (33% of total) and Lethbridge (21% of total) and Edmonton (5% of total).

Figure 32: Place of Residence for Workers who Commute to Vulcan County to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	175	100%
Vulcan T	30	17%
Wheatland County MD	20	11%
Milo VL	15	9%
Arrowwood VL	15	9%
Foothills No. 31 MD	15	9%

Source: Statistics Canada, 2016 Census of Population.

2.1.8 Business Counts

A business characteristics assessment was completed to study the number and type of businesses in the SouthGrow Region, Southwest Region, Lethbridge, Taber, Cardston, Fort MacLeod and Vulcan County. Specifically, these businesses were profiled total employee numbers, size of business establishments by employees and businesses by industry.

Notes on Data

Statistics Canada's Canadian Business Counts Data provides a record of business establishments by industry and size. This data is collected from the Canada Revenue Agency (CRA). The business data collected for Port Alberni include all local businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to CRA; or
- Have a minimum of $30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The SouthGrow region includes the following 28 communities:

- Warner County No. 5
- Coutts
- Milk River
- Warner
- Raymond
- Stirling
- Lethbridge County
- Lethbridge
- Coalhurst
- Nobleford
- Barons
- Coaldale
- Taber MD
- Taber
- Barnwell
- Vauxhall
- Cardston County
- Magrath
- Cardston
- Claresholm
- Blood 148
- Vulcan County
- Carmangay
- Champion
- Vulcan
- Lomond
- Milo
- Arrowwood

Due to the availability of data from Statistics Canada's Canadian Business Counts Milk River, Barnwell, Vauxhall, Carmangay, champion, milo and Arrowwood showed counts of zero for all business types.

The SouthWest region includes the following 16 communities:

- Cardston County
- Improvement District No. 4 Waterton
- Cardston
- Glenwood
- Hill Spring
- Pincher Creek No. 9
- Pincher Creek
- Cowley
- Willow Creek No. 26
- Fort MacLeod
- Granum
- Claresholm
- Stavely
- Nanton
- Crowsnest Pass
- Ranchland No. 66

Due to the availability of data from Statistics Canada's Canadian Business Counts Glenwood, Hill Spring, Cowley, Granum, Stavely and Ranchland No. 66 showed counts of zero for all business types.

The Study Area is a combination of the SouthGrow and Southwest regions and is made up of all 41 communities. While Claresholm, Cardston Cardston County are in both the SouthGrow and SouthWest regions that were only accounted for once in calculating the Study Area.

Interpreting the Data

Canadian business counts are compiled from the Business Register, Statistics Canada's central listing of Canadian businesses. The Canadian Business Counts Data records business counts by "Total" and "Subtotal" categories. It should be noted that the Canadian Business Counts Data uses the CRA as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than $30,000 are not included. The population of these small, unincorporated businesses is thought to be in the range of 600,000 in all of Canada.

There are some considerations when analyzing and interpreting the data.

As changes to the Business Register's methodology or business industrial classification strategies can bring about increases or decreases in the number of active businesses, it is important to study the data as a percentage of total businesses rather than focus on absolute numbers.

Statistics Canada also specifies that the business counts are based on the statistical concept of "location"—that is, each operating location is separately counted, including cases where one business comprises multiple locations. For example, a retail business with ten stores represents ten businesses in the Canadian business counts.

Canadian Business Counts Data includes all registered companies that have a Goods and Services Tax number, as registered through the Canada Revenue Agency. Results should not be compared directly to existing business directories in the regions in the study as the criteria for registering are different for both. The Canadian Business Counts data are used so that comparisons can be made to the Provincial Distribution of businesses across the same categories.

Local Concentration by Location Quotient (LQ)

An LQ measures the concentration of employment and business activity in a local area relative to an over-arching area.

An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist

Study Area Key Business Characteristics

A detailed review of the business counts data was studied using the Canadian Business Counts. As of December 2018, approximately 25,731 businesses were registered in the Study Area. These include businesses classified by industry (24,041 businesses) and those unclassified (1,690 businesses). The figure bellows the total businesses in the Study Area alongside a breakdown of businesses without employees and with employees.

Of the 25,731 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 70 percent of businesses in the Study Area are sole-proprietors (without employees), and the other 30 percent of businesses employ at least 1-4 people.

Figure 33: Study Area Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	25731	17937	7794	4291	1510	1055	645	175	77	30	11
Unclassified	1690	1361	329	255	44	20	8	0	2	0	0
Sub-total, classified	24041	16576	7465	4036	1466	1035	637	175	75	30	11
Agriculture, forestry, fishing and hunting	5435	4521	914	630	138	83	54	7	2	0	0
Mining, quarrying, and oil and gas extraction	314	180	134	96	15	11	9	3	0	0	0
Utilities	67	43	24	8	5	6	3	2	0	0	0
Construction	2494	1547	947	578	203	100	48	13	5	0	0
Manufacturing	441	198	243	84	34	47	44	15	12	6	1
Wholesale trade	628	262	366	143	88	80	47	6	2	0	0
Retail trade	1501	577	924	288	287	220	84	32	9	4	0
Transportation and warehousing	1252	848	404	257	61	43	27	10	4	2	0
Information and cultural industries	173	90	83	31	29	7	12	3	1	0	0
Finance and insurance	1315	1035	280	163	54	39	20	2	2	0	0
Real estate and rental and leasing	3665	3392	273	224	20	18	7	3	1	0	0
Professional, scientific and technical services	1773	1141	632	467	86	53	18	3	3	2	0
Management of companies and enterprises	213	175	38	23	5	2	5	2	1	0	0
Administrative and support, waste management and remediation services	713	454	259	129	57	40	24	7	0	2	0
Educational services	191	123	68	22	17	8	10	1	1	1	8
Health care and social assistance	1326	675	651	361	104	79	51	28	20	7	1
Arts, entertainment and recreation	276	174	102	33	19	18	22	6	3	1	0
Accommodation and food services	619	186	433	86	97	112	114	19	4	1	0
Other services (except public administration)	1598	952	646	406	142	61	29	5	1	2	0
Public administration	47	3	44	7	5	8	9	8	4	2	1

Source: Canadian Business Counts, December 2018 (Note: highlighted figures have been calculated using data from limited communities)

SouthGrow Region Key Business Characteristics

A detailed review of the business counts data was studied using the Canadian Business Counts. As of December 2018, approximately 21,824 businesses were registered in the SouthGrow Region. These include businesses classified by industry (20,338 businesses) and those unclassified (1,436 businesses). Figure 34 shows the total businesses in the SouthGrow Region alongside a breakdown of businesses without employees and with employees.

Of the 21,824 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 69 percent of businesses in the SouthGrow Region are sole-proprietors (without employees), and the other 31 percent of businesses employ at least 1-4 people.

Figure 34: SouthGrow Region Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	21,824	15,115	6,709	3,658	1,291	917	578	159	67	29	10
Unclassified	1,436	1,153	283	222	37	15	8	0	1	0	0
Sub-total, classified	20,388	13,962	6,426	3,436	1,254	902	570	159	66	29	10
Agriculture, forestry, fishing and hunting	4,400	3,622	778	531	119	69	50	7	2	0	0
Mining, quarrying, and oil and gas extraction	275	160	115	85	13	9	7	1	0	0	0
Utilities	50	35	15	5	2	4	3	1	0	0	0
Construction	2,101	1,284	817	492	173	86	48	13	5	0	0
Manufacturing	360	152	208	69	29	40	38	14	11	6	1
Wholesale trade	559	229	330	122	78	77	45	6	2	0	0
Retail trade	1,247	469	778	224	242	195	76	29	8	4	0
Transportation and warehousing	1,088	734	354	220	56	40	23	10	3	2	0
Information and cultural industries	132	64	68	24	25	6	9	3	1	0	0
Finance and insurance	1,175	924	251	149	47	32	19	2	2	0	0
Real estate and rental and leasing	3,256	3,015	241	198	19	14	6	3	1	0	0
Professional, scientific and technical services	1,506	944	562	412	78	46	18	3	3	2	0
Management of companies and enterprises	188	157	31	19	4	2	4	1	1	0	0
Admin. and support, waste mgmt. and remediation services	608	388	220	109	46	36	20	7	0	2	0
Educational services	175	113	62	20	16	7	9	1	1	1	7
Health care and social assistance	1,184	598	586	330	97	66	46	22	17	7	1
Arts, entertainment and recreation	222	141	81	26	13	15	18	6	2	1	0
Accommodation and food services	485	134	351	64	68	99	99	18	2	1	0
Other services (except public administration)	1,340	797	543	331	124	54	26	5	1	2	0
Public administration	37	2	35	6	5	5	6	7	4	1	1

Source: Canadian Business Counts, December 2018 (Note: highlighted figures have been calculated using data from limited communities)

Southwest Region Key Business Characteristics

A detailed review of the business counts data was studied using the Canadian Business Counts. As of December 2018, approximately 5,713 businesses were registered in the Southwest Region. These include businesses classified by industry (5,348 businesses) and those unclassified (1,693 businesses). The figure below shows the total businesses in the Southwest Region alongside a breakdown of businesses without employees and with employees. Of the 5,713 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 73 percent of businesses in the Southwest Region are sole-proprietors (without employees), and the other 27 percent of businesses employ at least 1-4 people.

Figure 35: Southwest Region Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	5,713	4,191	1,522	890	298	196	95	27	11	3	2
Unclassified	365	294	71	52	9	7	2	0	1	0	0
Sub-total, classified	5,348	3,897	1,451	838	289	189	93	27	10	3	2
Agriculture, forestry, fishing and hunting	1,693	1,485	208	155	29	19	5	0	0	0	0
Mining, quarrying, and oil and gas extraction	58	30	28	17	2	4	3	2	0	0	0
Utilities	25	14	11	4	3	2	1	1	0	0	0
Construction	509	345	164	110	38	16	0	0	0	0	0
Manufacturing	107	60	47	20	7	10	8	1	1	0	0
Wholesale trade	101	49	52	29	15	6	2	0	0	0	0
Retail trade	366	171	195	79	58	39	12	6	1	0	0
Transportation and warehousing	211	145	66	48	6	6	4	1	1	0	0
Information and cultural industries	52	30	22	10	6	3	3	0	0	0	0
Finance and insurance	213	165	48	24	12	10	2	0	0	0	0
Real estate and rental and leasing	605	564	41	33	3	4	1	0	0	0	0
Professional, scientific and technical services	360	258	102	80	14	8	0	0	0	0	0
Management of companies and enterprises	29	22	7	4	1	0	1	1	0	0	0
Admin. and support, waste mgmt. and remediation services	140	90	50	28	12	6	4	0	0	0	0
Educational services	24	15	9	4	1	1	1	0	0	0	2
Health care and social assistance	220	120	100	47	14	16	10	8	4	1	0
Arts, entertainment and recreation	71	44	27	10	7	3	6	0	1	0	0
Accommodation and food services	186	70	116	32	36	22	21	3	2	0	0
Other services (except public administration)	363	219	144	103	24	11	5	0	0	1	0
Public administration	15	1	14	1	1	3	4	4	0	1	0

Source: Canadian Business Counts, December 2018 (Note: highlighted figures have been calculated using data from limited communities)

Lethbridge Key Business Characteristics

A detailed review of the business counts data was studied using the Canadian Business Counts. As of December 2018, approximately 10,250 businesses were registered in Lethbridge. These include businesses classified by industry (9,451 businesses) and those unclassified (799 businesses). Figure 36 shows the total businesses in the Lethbridge alongside a breakdown of businesses without employees and with employees. Of the 10,250 businesses classified by industry, the greatest number of businesses are found in real estate and rental and leasing, construction and health care and social assistance. Approximately 64 percent of businesses in Lethbridge are sole-proprietors (without employees), and the other 36 percent of businesses employ at least 1-4 people.

Figure 36: Lethbridge Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	10,250	6,607	3,643	1,803	706	573	373	110	51	19	8
Unclassified	799	637	162	123	24	11	3	0	1	0	0
Sub-total, classified	9,451	5,970	3,481	1,680	682	562	370	110	50	19	8
Agriculture, forestry, fishing and hunting	322	290	32	20	2	7	3	0	0	0	0
Mining, quarrying, and oil and gas extraction	63	38	25	17	3	2	2	1	0	0	0
Utilities	8	4	4	1	1	1	1	0	0	0	0
Construction	1,063	625	438	253	87	47	34	12	5	0	0
Manufacturing	195	62	133	44	18	24	23	11	8	4	1
Wholesale trade	268	95	173	66	36	38	27	5	1	0	0
Retail trade	793	240	553	143	173	144	58	23	8	4	0
Transportation and warehousing	350	228	122	67	17	21	11	4	2	0	0
Information and cultural industries	80	40	40	9	16	3	8	3	1	0	0
Finance and insurance	727	559	168	102	25	23	15	1	2	0	0
Real estate and rental and leasing	1,971	1,807	164	129	13	13	5	3	1	0	0
Professional, scientific and technical services	976	574	402	284	55	39	16	3	3	2	0
Management of companies and enterprises	118	92	26	15	3	2	4	1	1	0	0
Admin. and support, waste mgmt. and remediation services	359	214	145	64	30	26	16	7	0	2	0
Educational services	109	73	36	10	12	2	7	0	0	0	5
Health care and social assistance	842	441	401	236	68	44	25	11	12	4	1
Arts, entertainment and recreation	140	85	55	16	5	13	13	5	2	1	0
Accommodation and food services	308	69	239	27	37	76	81	15	2	1	0
Other services (except public administration)	755	433	322	177	81	37	20	5	1	1	0
Public administration	4	1	3	0	0	0	1	0	1	0	1

Source: Canadian Business Counts, December 2018

Town of Taber Key Business Characteristics

As of December 2018, approximately 1,482 businesses were registered in the Town of Taber. These include businesses classified by industry (1,373 businesses) and those unclassified (109 businesses). Figure 37 shows the total businesses in the Town of Taber alongside a breakdown of businesses without employees and with employees. Of the 1,482 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 67 percent of businesses in the Town of Taber are sole-proprietors (without employees), and the other 33 percent of businesses employ at least 1-4 people.

Figure 37: Town of Taber Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100+
Total	1,482	991	491	250	98	74	50	12	7
Unclassified	109	93	16	14	0	0	2	0	0
Sub-total, classified	1,373	898	475	236	98	74	48	12	7
Agriculture, forestry, fishing and hunting	195	160	35	14	9	5	4	3	0
Mining, quarrying, and oil and gas extraction	75	39	36	27	3	3	3	0	0
Utilities	4	1	3	1	0	2	0	0	0
Construction	157	92	65	34	15	9	7	0	0
Manufacturing	25	9	16	2	1	5	4	1	3
Wholesale trade	49	18	31	9	8	9	5	0	0
Retail trade	73	29	44	12	14	10	6	2	0
Transportation and warehousing	143	100	43	27	4	5	5	2	0
Information and cultural industries	6	1	5	1	3	1	0	0	0
Finance and insurance	64	52	12	5	3	3	1	0	0
Real estate and rental and leasing	198	184	14	11	2	1	0	0	0
Professional, scientific and technical services	108	68	40	32	6	1	1	0	0
Management of companies and enterprises	15	15	0	0	0	0	0	0	0
Administrative and support, waste management and remediation services	37	24	13	6	5	1	1	0	0
Educational services	12	4	8	2	2	2	1	0	1
Health care and social assistance	52	27	25	13	2	3	3	3	1
Arts, entertainment and recreation	8	5	3	2	0	0	1	0	0
Accommodation and food services	32	6	26	6	7	8	4	1	0
Other services (except public administration)	118	64	54	32	14	6	2	0	0
Public administration	2	0	2	0	0	0	0	0	2

Source: Canadian Business Counts, December 2018

Cardston Key Business Characteristics

As of December 2018, approximately 622 businesses were registered in Cardston. These include businesses classified by industry (576 businesses) and those unclassified (46 businesses). Figure 38 shows the total businesses in Cardston alongside a breakdown of businesses without employees and with employees. Of the 622 businesses classified by industry, the greatest number of businesses are found in agriculture, forestry, fishing and hunting, construction and retail trade. Approximately 72 percent of businesses in Cardston are sole-proprietors (without employees), and the other 28 percent of businesses employ at least 1-4 people.

Figure 38: Cardston Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100+
Total	622	447	175	95	36	23	13	5	3
Unclassified	46	35	11	10	1	0	0	0	0
Sub-total, classified	576	412	164	85	35	23	13	5	3
Agriculture, forestry, fishing and hunting	120	111	9	7	1	1	0	0	0
Mining, quarrying, and oil and gas extraction	7	5	2	0	0	1	1	0	0
Utilities	6	5	1	0	0	0	1	0	0
Construction	58	34	24	17	5	2	0	0	0
Manufacturing	10	4	6	1	2	2	1	0	0
Wholesale trade	14	7	7	5	2	0	0	0	0
Retail trade	55	36	19	6	5	4	3	1	0
Transportation and warehousing	9	4	5	5	0	0	0	0	0
Information and cultural industries	6	2	4	2	1	1	0	0	0
Finance and insurance	34	25	9	5	3	1	0	0	0
Real estate and rental and leasing	77	72	5	4	1	0	0	0	0
Professional, scientific and technical services	42	28	14	11	2	1	0	0	0
Management of companies and enterprises	3	3	0	0	0	0	0	0	0
Administrative and support, waste management and remediation services	13	9	4	3	0	1	0	0	0
Educational services	3	1	2	1	0	0	0	0	1
Health care and social assistance	47	26	21	7	7	2	3	1	1
Arts, entertainment and recreation	8	5	3	2	0	0	1	0	0
Accommodation and food services	25	10	15	4	3	5	2	1	0
Other services (except public administration)	37	25	12	5	3	2	1	0	1
Public administration	2	0	2	0	0	0	0	2	0

Source: Canadian Business Counts, December 2018

Fort MacLeod Key Business Characteristics

As of December 2018, approximately 779 businesses were registered in Ford MacLeod. These include businesses classified by industry (719 businesses) and those unclassified (60 businesses). Figure 39 shows the total businesses in Ford MacLeod alongside a breakdown of businesses without employees and with employees. Of the 779 businesses classified by industry, the greatest number of businesses are found in agriculture, forestry, fishing and hunting, construction and retail trade. Approximately 72 percent of businesses in Ford MacLeod are sole-proprietors (without employees), and the other 28 percent of businesses employ at least 1-4 people.

Figure 39: Fort MacLeod Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100+
Total	779	561	218	119	46	29	17	5	2
Unclassified	60	51	9	6	3	0	0	0	0
Sub-total, classified	719	510	209	113	43	29	17	5	2
Agriculture, forestry, fishing and hunting	203	181	22	15	3	3	1	0	0
Mining, quarrying, and oil and gas extraction	2	1	1	0	0	1	0	0	0
Utilities	5	4	1	0	0	0	0	1	0
Construction	88	60	28	15	9	4	0	0	0
Manufacturing	14	4	10	2	2	1	4	0	1
Wholesale trade	21	8	13	8	4	0	1	0	0
Retail trade	52	20	32	15	9	5	2	1	0
Transportation and warehousing	50	29	21	14	4	1	2	0	0
Information and cultural industries	5	3	2	2	0	0	0	0	0
Finance and insurance	31	26	5	3	0	2	0	0	0
Real estate and rental and leasing	73	66	7	7	0	0	0	0	0
Professional, scientific and technical services	30	23	7	5	1	1	0	0	0
Management of companies and enterprises	8	5	3	2	0	0	1	0	0
Administrative and support, waste management and remediation services	19	12	7	4	2	1	0	0	0
Educational services	4	2	2	0	0	0	1	0	1
Health care and social assistance	34	23	11	2	1	4	2	2	0
Arts, entertainment and recreation	8	4	4	1	0	2	1	0	0
Accommodation and food services	26	11	15	8	4	0	2	1	0
Other services (except public administration)	45	27	18	10	4	4	0	0	0
Public administration	1	1	0	0	0	0	0	0	0

Source: Canadian Business Counts, December 2018

Vulcan County Key Business Characteristics

As of December 2018, approximately 738 businesses were registered in Vulcan County. These include businesses classified by industry (718 businesses) and those unclassified (20 businesses). Figure 40 shows the total businesses in Vulcan County alongside a breakdown of businesses without employees and with employees. Of the 738 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 77 percent of businesses in Vulcan County are sole-proprietors (without employees), and the other 23 percent of businesses employ at least 1-4 people.

Figure 40: Vulcan County Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100+
Total	779	561	218	119	46	29	17	5	2
Unclassified	60	51	9	6	3	0	0	0	0
Sub-total, classified	719	510	209	113	43	29	17	5	2
Agriculture, forestry, fishing and hunting	203	181	22	15	3	3	1	0	0
Mining, quarrying, and oil and gas extraction	2	1	1	0	0	1	0	0	0
Utilities	5	4	1	0	0	0	0	1	0
Construction	88	60	28	15	9	4	0	0	0
Manufacturing	14	4	10	2	2	1	4	0	1
Wholesale trade	21	8	13	8	4	0	1	0	0
Retail trade	52	20	32	15	9	5	2	1	0
Transportation and warehousing	50	29	21	14	4	1	2	0	0
Information and cultural industries	5	3	2	2	0	0	0	0	0
Finance and insurance	31	26	5	3	0	2	0	0	0
Real estate and rental and leasing	73	66	7	7	0	0	0	0	0
Professional, scientific and technical services	30	23	7	5	1	1	0	0	0
Management of companies and enterprises	8	5	3	2	0	0	1	0	0
Administrative and support, waste management and remediation services	19	12	7	4	2	1	0	0	0
Educational services	4	2	2	0	0	0	1	0	1
Health care and social assistance	34	23	11	2	1	4	2	2	0
Arts, entertainment and recreation	8	4	4	1	0	2	1	0	0
Accommodation and food services	26	11	15	8	4	0	2	1	0
Other services (except public administration)	45	27	18	10	4	4	0	0	0
Public administration	1	1	0	0	0	0	0	0	0

Source: Canadian Business Counts, December 2018

2.1.9 Business Counts LQ

An LQ measures the concentration of employment and business activity in a local area relative to an over-arching area.

An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist

The location quotients analysis (Figure 41) for the business sector in Lethbridge, Taber, Cardston, Fort MacLeod, Vulcan County, SouthGrow Region, SouthWest Region and Study Area are individually compared to the average Alberta community. The following sectors were found to have a high concentration of businesses relative to the province.

- **Lethbridge**: Retail trade, health care and social assistance and real estate and rental and leasing among others highlighted in green in figure 41
- **Town of Taber:** Mining, quarrying, and oil and gas extraction, utilities and transportation and warehousing among others highlighted in green in figure 41
- **Cardston:** Utilities, agriculture, forestry, fishing and hunting and public administration among others highlighted in green in figure 41
- **Fort MacLeod:** Utilities, agriculture, forestry, fishing and hunting, accommodation and food services and retail trade
- **Vulcan County:** Agriculture, forestry, fishing and hunting, utilities, public administration and mining, quarrying, and oil and gas extraction
- **SouthGrow Region:** Agriculture, forestry, fishing and hunting and Utilities
- **Southwest Alberta:** Agriculture, forestry, fishing and hunting, utilities, public administration, accommodation and food services
- **Study Area:** Agriculture, forestry, fishing and hunting and Utilities and construction

Figure 41: Location Quotient by Industry Businesses (NAICS), All Regions, 2018

Sectors	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area
Agriculture, forestry, fishing and hunting	0.39	1.63	2.38	3.22	7.74	2.49	3.66	2.61
Mining, quarrying, and oil and gas extraction	0.27	2.25	0.50	0.11	1.51	0.56	0.45	0.54
Utilities	0.59	2.04	7.27	4.84	6.13	1.73	3.30	1.96
Construction	0.91	0.93	0.82	0.99	0.33	0.85	0.78	0.85
Manufacturing	1.14	1.01	0.96	1.08	0.24	0.99	1.12	1.03
Wholesale trade	1.18	1.50	1.02	1.22	0.43	1.16	0.80	1.11
Retail trade	1.47	0.94	1.68	1.27	0.15	1.09	1.22	1.11
Transportation and warehousing	0.63	1.77	0.27	1.18	0.42	0.92	0.68	0.90
Information and cultural industries	1.09	0.56	1.34	0.89	0.57	0.84	1.27	0.94
Finance and insurance	1.33	0.81	1.02	0.75	0.25	1.01	0.70	0.96
Real estate and rental and leasing	1.41	0.98	0.91	0.69	0.82	1.09	0.77	1.04
Professional, scientific and technical services	0.70	0.54	0.50	0.28	0.18	0.51	0.47	0.51
Management of companies and enterprises	1.30	1.14	0.54	1.16	N/A	0.97	0.57	0.93
Administrative and support, waste management and remediation services	0.95	0.68	0.57	0.66	0.15	0.76	0.67	0.75
Educational services	1.06	0.81	0.48	0.51	0.81	0.80	0.42	0.74
Health care and social assistance	1.45	0.62	1.34	0.77	0.05	0.96	0.68	0.91
Arts, entertainment and recreation	1.26	0.50	1.19	0.95	0.25	0.94	1.15	0.99
Accommodation and food services	1.20	0.86	1.60	1.33	0.38	0.89	1.30	0.96
Other services (except public administration)	1.09	1.17	0.88	0.85	0.50	0.91	0.94	0.92
Public administration	0.26	0.90	2.15	0.86	3.62	1.13	1.76	1.22

Source: Canadian Business Counts, December 2018 (Note: highlighted figures have been calculated using data from limited communities)

3. Southern Alberta Occupation Requirements

metroeconomics prepared this section of the report. It assesses the number of jobs expected to be created in the Lethbridge area between 2020 and 2025 from both an industrial and occupational perspective. Projections are provided for the number of new positions to be filled due both to economic expansion and to worker retirements over that span. Economic demand projections by industry and occupation have been developed for each of the following five individual municipalities (the Census refers to them as Census Sub-Divisions or CSDs):

- the City of Lethbridge
- the Town of Taber
- the Town of Cardston
- the Town of Fort MacLeod
- Vulcan County

Economic demand projections by industry and occupation have also been developed for SouthGrow Region as a whole and Southwest Alberta as a whole. SouthGrow Region includes the following 28 CSDs:

Figure 42: SouthGrow CSD Definition

CSD#	CSD Name	CSD Type
4802001	Warner County No. 5	Municipal district
4802002	Coutts	Village
4802004	Milk River	Town
4802006	Warner	Village
4802008	Raymond	Town
4802009	Stirling	Village
4802011	Lethbridge County	Municipal district
4802012	Lethbridge	City
4802013	Coalhurst	Town
4802014	Nobleford	Village
4802016	Barons	Village
4802019	Coaldale	Town
4802021	Taber	Municipal district
4802022	Taber	Town
4802023	Barnwell	Village
4802029	Vauxhall	Town
4803001	Cardston County	Municipal district
4803002	Magrath	Town
4803004	Cardston	Town
4803022	Claresholm	Town
4803802	Blood 148	Indian reserve
4805001	Vulcan County	Municipal district
4805002	Carmangay	Village
4805004	Champion	Village
4805006	Vulcan	Town
4805008	Lomond	Village
4805009	Milo	Village
4805011	Arrowwood	Village

South West Alberta includes the following 16 CSDs:

Figure 43: South West Alberta CSD Definition

CSD#	CSD Name	CSD Type
4803001	Cardston County	Municipal district
4803003	Improvement District No. 4 Waterton	Improvement district
4803004	Cardston	Town
4803006	Glenwood	Village
4803008	Hill Spring	Village
4803011	Pincher Creek No. 9	Municipal district
4803014	Pincher Creek	Town
4803016	Cowley	Village
4803018	Willow Creek No. 26	Municipal district
4803019	Fort MacLeod	Town
4803021	Granum	Town
4803022	Claresholm	Town
4803024	Stavely	Town
4803026	Nanton	Town
4815007	Crowsnest Pass	Specialized municipality
4815045	Ranchland No. 66	Municipal district

Considerable overlap exists across these geographic definitions. SouthGrow Region includes 4 of the five separately identified CSDs (shaded) while Southwest Alberta includes 2 of them (also shaded).

And the Town of Cardston appears in all three lists (not shaded).

From this point forward, all the CSDs mentioned above, excluding any double-counting, will be referred to collectively as the Study Area. Total economic demand projections are provided for each of:

- the five separate CSDs
- South Grow Region as a whole
- South West Alberta as a whole
- the Study Area as a whole

Economic demand and retiree replacement projections by detailed occupation are summarized in this report for the Study Area as a whole. Microsoft Excel files containing greater details are attached.

3.1.1 The Economy of the Study Area

The Study Area in 2016 was home to 198,568 people. Employers in the area provided a total of 77,080 jobs. Thus, the area provides an average of 388 jobs for every 1,000 residents, a ratio lower than the 442 jobs per 1,000 residents prevailing province-wide.

Based on a Location Quotient (LQ) assessment of employment by industry by place-of-work in 2016 for the Study Area compared to Alberta as a whole (Figure 40), 16,229 of the area's 77,080 jobs are economic base jobs (or 21 percent of the total) and the remaining 60,851 are community base jobs.

Figure 44: Study Area Employment by Place-of-Work by Major Industry in 2016 - Location Quotient Decomposition into Economic and Community Base Jobs

	Study Area		Alberta		Job Types	
	Number	Per 1,000	Number	Per 1,000	Economic Base	Community Base
Total population	198,568		4,067,175			
Total employment by place-of-work	77,080	388	1,796,530	442	16,229	60,851
Agriculture, other primary	7,645	39	55,750	14	7,645	0
Mining, oil and gas	725	4	99,045	24	725	0
Utilities	415	2	18,090	4	0	415
Construction	3,550	18	108,320	27	0	3,550
Manufacturing	6,015	30	107,260	26	6,015	0
Wholesale trade	2,400	12	68,785	17	0	2,400
Retail trade	9,855	50	222,695	55	0	9,855
Transportation, warehousing	2,235	11	75,810	19	0	2,235
Information, culture	840	4	27,345	7	0	840
Finance, insurance	3,245	16	98,505	24	0	3,245
Professional, scientific, technical services	3,420	17	136,670	34	0	3,420
Other business services	2,135	11	57,585	14	0	2,135
Education	7,110	36	131,365	32	696	6,414
Health, social services	12,030	61	222,895	55	1,148	10,882
Arts, entertainment, recreation	1,525	8	36,910	9	0	1,525
Accommodation, food	5,795	29	135,195	33	0	5,795
Other services	3,860	19	86,985	21	0	3,860
Government	4,280	22	107,320	26	0	4,280

Source: Statistics Canada and *metroeconomics*

Economic base jobs support the overall economy. Growth in economic base jobs can lead to overall growth. Community base jobs support the needs of the local population.[4] The economic base of the Study Area is primarily defined by agriculture and other primary activities (in this case other primary means forestry) (7,645 jobs), manufacturing (6,015) and mining and oil and gas (725) with a few exportable service jobs in health care and social services (1,148) and education (696).

Figure 45 indicates where within the Study Area, the 77,080 jobs are located and provide details regarding those industries within manufacturing that account for most of its jobs. The final column in Figure 41 repeats the first data column in Figure 40. It excludes any double counting across the Area.

The highlights of Figure 45 include the following:

- Lethbridge accounts for 92,729 residents or 47 percent of the Study Area's total
- Lethbridge accounts for 43,365 jobs or 56 percent of the Study Area's total
- South Grow accounts for 168,971 residents and 67,575 jobs (85 and 88 percent respectively of the Study Area's totals)
- South West accounts for 36,149 residents and 12,630 jobs (18 and 16 percent respectively)

[4] The Location Quotient procedure and the terms economic base and community are explained in greater detail in the accompanying appendix.

Figure 45: Study Area Employment by Place-of-Work by Major Industry in 2016 - Selected Geographic Areas within the Study Area

	Lethbridge	Taber	Cardston	Fort MacLeod	Vulcan County	Sum of the 5	South Grow	South West	Study Area
Population	92,729	8,428	3,585	2,967	3,984	111,693	168,971	36,149	198,568
Employed by place of residence (EPOR)	47,705	4,035	1,320	1,280	1,570	55,910	79,235	15,710	92,345
Employed by place of work (EPOW)	43,365	3,870	1,405	1,720	860	51,220	67,575	12,630	77,080
Agriculture, forestry	565	230	45	150	610	1,600	5,750	2,090	7,645
Mining, oil and gas	95	125	0	15	30	265	530	210	725
Utilities	250	20	10	0	0	280	390	35	415
Construction	2,150	90	75	145	15	2,475	3,235	535	3,550
Manufacturing	3,615	560	60	250	20	4,505	5,585	740	6,015
Wholesale trade	1,260	205	25	50	20	1,560	2,215	260	2,400
Retail trade	6,920	540	170	215	10	7,855	8,840	1,400	9,855
Transportation, warehousing	1,010	185	15	80	10	1,300	2,040	290	2,235
Information, culture	625	20	0	25	0	670	780	85	840
Finance, insurance	2,290	95	45	50	20	2,500	2,885	455	3,245
Professional, scientific, technical services	2,230	170	50	25	10	2,485	3,025	470	3,420
Other business services	1,290	75	60	40	10	1,475	1,930	305	2,135
Education	4,225	325	220	105	30	4,905	6,475	960	7,110
Health, social services	7,420	425	370	255	10	8,480	10,515	2,140	12,030
Arts, entertainment, recreation	825	20	25	50	0	920	1,140	460	1,525
Accommodation, food	4,000	340	50	105	30	4,525	5,050	900	5,795
Other services	2,360	285	85	70	25	2,825	3,395	620	3,860
Government	2,235	160	100	90	10	2,595	3,795	675	4,280
Manufacturing	3,615	560	60	250	20	4,505	5,585	740	6,015
Food	1,390	425	0	120	0	1,935	2,355	280	2,515
Beverage and tobacco product	120	45	0	0	0	165	190	10	200
Textile mills	0	0	10	0	0	10	10	10	10
Textile product mills	10	0	0	0	0	10	10	10	20
Clothing	0	0	0	0	0	0	0	0	0
Leather and allied product	0	0	0	0	0	0	0	10	10
Wood product	255	10	15	55	0	335	360	120	410
Paper	0	10	0	0	10	20	30	10	40
Printing and related support activities	65	0	0	0	0	65	85	0	85
Petroleum and coal products	15	0	0	15	10	40	35	50	70
Chemical	55	0	0	0	0	55	65	0	65
Plastics and rubber products	95	0	0	0	0	95	115	30	145
Non-metallic mineral product	110	20	15	0	0	145	235	35	255
Primary metal	195	0	0	10	0	205	205	10	205
Fabricated metal product	590	30	10	10	0	640	750	60	790
Machinery	95	10	0	30	0	135	190	75	235
Computer and electronic product	30	0	0	0	0	30	30	0	30
Electrical equipment, appliance and component	25	0	0	0	0	25	25	10	35
Transportation equipment	285	0	10	10	0	305	435	20	435
Furniture and related product	130	0	0	0	0	130	215	0	215
Miscellaneous	150	10	0	0	0	160	245	0	245

Source: Statistics Canada and *metroeconomics*

Manufacturing accounts for 37 percent of the Study Area's economic base jobs:

- Lethbridge accounts for 60 percent of the Study Area's manufacturing jobs while South Grow Area accounts for 93 percent and South West Alberta for 12 percent
- Manufacturing's 6,015 Study Area job base is diversified with food leading the way (2,515) followed by fabricated metal products (790), transportation equipment (435), wood products (410), non-metallic mineral products (255), miscellaneous products (245), machinery (235), furniture and related products (215), primary metals (205) and beverages and tobacco (200)

3.1.2 Projected Employment Growth 2020 to 2025 by Area

Figure 46 tabulates the projected changes in employment throughout the Study Area between 2020 and 2025 geographically. The jobs for 2020 are estimated by *metroeconomics,* while the jobs for 2025 are projected drawing on *metroeconomics*' detailed CSD level estimates and projection system.

Figure 46: Study Area Employment by Place-of-Work by Area - Estimated for 2020 and Projected for 2025

Geography	2020	2025	Change 2020-2025
Study Area	82,241	86,388	4,147
Lethbridge	47,047	51,205	4,158
Taber	4,078	4,137	59
Cardston	1,423	1,413	-10
Fort MacLeod	1,695	1,681	-14
Vulcan County	837	839	2
Sum of the 5	55,080	59,275	4,195
SouthGrow	71,135	75,242	4,107
Southwest	12,529	12,560	31

Source: *metroeconomics*

Over 2020 to 2025, the total number employed across the Study Area as a whole is projected to grow from 82,241 to 86,388 or by 4,147. Jobs across the selected five municipalities as a group are projected to grow by 4,195 with that growth distributed among the five as follows:

- jobs in Lethbridge are projected to grow by 4,158
- jobs in the Town of Taber are projected to grow by 59
- jobs in Cardston are projected to decline by 10
- jobs in Fort MacLeod are projected to decline by 14
- jobs in Vulcan County are projected to increase by 2

Employment across the 28 municipalities that define South Grow Region is projected to grow by 4,107, while employment across the 16 CSDs that define South West Alberta is projected to grow by 31.

On balance, Figure 46 shows that Lethbridge accounts for the lion's share of the job gains expected between 2020 and 2025 across the Study Area.

3.1.3 Projected Employment Growth 2020 to 2025 by Major Industry

Figure 47 tabulates the changes in employment projected throughout the Study Area between 2020 and 2025 by major industry. The jobs are estimated and projected by *metroeconomics'* detailed CSD level estimates and projection system.

Figure 47: Study Area Employment by Place-of-Work by Major Industry - Estimated for 2020 and Projected for 2025

Industry	2020	2025	Change 2020-2025
Total all industries	82,241	86,388	4,147
Agriculture, forestry	7,289	7,386	97
Mining, oil and gas	784	806	22
Utilities	539	665	126
Construction	3,685	3,715	30
Manufacturing	7,390	7,387	-2
Wholesale trade	2,562	2,665	103
Retail trade	10,064	10,283	219
Transportation, warehousing	2,513	2,769	255
Information, culture	864	896	32
Finance, insurance	2,119	1,989	-130
Real estate and rental and leasing	1,210	1,415	204
Professional, scientific, technical services	3,432	3,397	-36
Other business services	2,280	2,551	271
Education	7,812	8,509	697
Health, social services	13,199	14,311	1,111
Arts, entertainment, recreation	1,631	1,736	105
Accommodation, food	6,188	6,636	448
Other services	3,690	3,505	-185
Government	4,990	5,769	779

Source: *metroeconomics*

Over the 2020 to 2025 period, jobs across the Study Area as a whole are projected to grow from 82,241 to 86,388 or by 4,147. The job changes projected for each of the 19 major industries over that span include the following:

- health care and social services up 1,111
- government up 779
- education up 697
- accommodation and food up 448
- other business services up 271
- transportation and warehousing up 255
- retail trade up 219
- real estate and rental and leasing up 204
- utilities up 126
- arts, entertainment and recreation up 105
- wholesale trade up 103
- agriculture and forestry up 97

Modest gains are projected for:

- information and culture up 32
- construction up 30
- mining and oil and gas up 22

Several major employers are expected to witness modest job declines, including:

- manufacturing down by 2
- professional, scientific and technical services down 36
- finance and insurance down 130
- other services down 185

The gains and losses above projected for each of the 19 2-digit NAICS industries are summations of projections for employment for each of 300 detailed industries at the 4-digit NAICS level.

3.1.4 Study Area Projected Detailed Occupation Requirements 2020 to 2025

The detailed employment by industry projections for the Study Area as a whole and each of the seven constituent sub-areas discussed above was transformed into *economic demand* projections for each of the 500 occupations identified in the National Occupation Classification System (NOCS).

Estimates were made, as well, of the number of people likely to retire from each of the 500 occupations within the Study Area as a whole over 2020 to 2025. Each retiree will need to be replaced if all 86,388 jobs projected for the Study Area as a whole for 2025 are to be filled. The *retiree replacement demand*, therefore, is equal to the expected number of retirees over the 2020 to 2025 span.

The total number of recruits required for each occupation between 2020 and 2025 is equal to the *economic demand* plus the *retiree replacement demand*. A Microsoft Excel file covering these two demand categories for the Study Area as a whole over the 2020 to 2025 period accompanies this report.

Figure 44 summarizes that table by ranking the 50 occupations representing the greatest recruitment challenges over the 2020 to 2025 span across the Study Area as a whole. The highlights of Exhibit 5 include the following:

- 4,147 new jobs will be created due to economic expansion
- another 4,227 workers are projected to retire over that period
- thus, the total recruitment challenge is 8,347 against a base of 82,241 employed in 2020
- the total recruitment challenge equals just over 10 percent of all the jobs in 2020
- the top 50 jobs account for two-thirds of the entire recruitment effort faced by the area
- the greatest challenge (426 total recruits) is posed by managers in agriculture (NOCS# 821)
- the second greatest (275) is posed by retail salespersons (6421)
- the third (234) is posed by nurse aides, orderlies, etc. (3413)
- the fourth (232) is posed by registered nurses, etc. (3012)
- the fifth (210) is posed by food counter attendants, etc. (6711)

These top 5 occupations collectively account for 16 percent of the total recruitment challenge faced by the Study Area. The top 27 occupations account for more than 50 percent of the total challenge.

Figure 48: Study Area Projected Detailed Occupation Requirements - Economic Demand and Retiree Replacement Demand 2020 to 2025

Rank	NOC #	Occupations	Employed 2020	Employed 2025	Economic Demand	Retirees 20-25	Total Demand
		Total all 500 occupations	82,241	86,388	4,147	4,227	8,374
1	821	Managers in agriculture	3,396	3,434	38	388	426
2	6421	Retail salespersons	3,262	3,340	78	197	275
3	3413	Nurse aides, orderlies and patient service associates	1,827	1,971	144	90	234
4	3012	Registered nurses and registered psychiatric nurses	1,846	1,996	150	82	232
5	6711	Food counter attendants, kitchen helpers and related support occupations	2,243	2,408	165	45	210
6	621	Retail and wholesale trade managers	2,457	2,515	58	139	197
7	4032	Elementary school and kindergarten teachers	1,452	1,584	132	62	194
8	7511	Transport truck drivers	1,256	1,353	97	93	190
9	6733	Janitors, caretakers and building superintendents	1,125	1,216	91	89	180
10	1221	Administrative officers	1,313	1,392	79	81	160
11	1411	General office support workers	1,272	1,357	85	73	159
12	1241	Administrative assistants	1,211	1,282	71	84	155
13	4413	Elementary and secondary school teacher assistants	1,146	1,251	105	46	151
14	8431	General farm workers	2,223	2,253	30	118	147
15	6731	Light duty cleaners	953	1,034	80	50	131
16	4212	Social and community service workers	1,107	1,191	84	45	129
17	6322	Cooks	1,169	1,255	86	33	119
18	1311	Accounting technicians and bookkeepers	1,076	1,101	25	93	117
19	6232	Real estate agents and salespersons	358	433	75	40	115
20	4031	Secondary school teachers	699	765	66	33	98
21	1414	Receptionists	862	919	57	41	98
22	7512	Bus drivers, subway operators and other transit operators	391	439	48	49	97
23	8612	Landscaping and grounds maintenance labourers	633	699	67	28	95
24	4011	University professors and lecturers	487	532	45	45	90
25	6513	Food and beverage servers	1,077	1,156	80	6	86
26	6611	Cashiers	1,338	1,373	36	46	82
27	1111	Financial auditors and accountants	696	719	23	52	75
28	4214	Early childhood educators and assistants	642	695	53	21	74
29	631	Restaurant and food service managers	664	715	51	21	72

Rank	NOC #	Occupations	Employed 2020	Employed 2025	Economic Demand	Retirees 20-25	Total Demand
30	3233	Licensed practical nurses	618	665	46	23	69
31	4021	College and other vocational instructors	426	457	32	35	67
32	6541	Security guards and related security service occupations	355	395	41	24	65
33	6552	Other customer and information services representatives	574	604	30	30	60
34	4412	Home support workers, housekeepers and related occupations	445	476	30	26	57
35	4311	Police officers (except commissioned)	341	394	53	3	57
36	1224	Property administrators	217	247	30	27	56
37	1431	Accounting and related clerks	515	538	22	32	54
38	714	Facility operation and maintenance managers	340	364	23	26	49
39	6622	Store shelf stockers, clerks and order fillers	836	845	10	39	49
40	5254	Program leaders and instructors in recreation, sport and fitness	428	464	36	9	45
41	4012	Post-secondary teaching and research assistants	361	394	32	13	45
42	7452	Material handlers	678	702	24	20	44
43	3414	Other assisting occupations in support of health services	388	417	29	13	42
44	3411	Dental assistants	295	324	29	12	40
45	6311	Food service supervisors	444	477	33	7	40
46	1521	Shippers and receivers	468	481	13	27	40
47	4153	Family, marriage and other related counsellors	279	302	24	15	39
48	4152	Social workers	285	313	27	12	39
49	7321	Automotive service technicians, truck and bus mechanics and mechanical repairers	810	817	7	31	38
50	3112	General practitioners and family physicians	279	304	24	13	38

Source: *metroeconomics*

3.1.5 Economic and Community Base Jobs

Employment by industry in any given area can be decomposed into economic base jobs (those that drive the overall economy) and community base jobs (those that serve the local population). The population growth of an area typically depends on its potential for growth in economic base employment, while an area's growth in community base employment depends on its population growth. In recognition of this interdependence between population and employment growth, *metroeconomics* has developed a community-based projection system that takes account of the economic and demographic factors influencing an area's growth potential. The system takes these factors into account as follows:

- the economic base of the community is identified through the de-composition of local jobs on a place of work basis by industry into those that are *economic base* jobs and those that are *community base* jobs; this is achieved using a location quotient process
- economic base industries produce goods and services consumed primarily by businesses or people outside of the local community; these industries – also called export-based industries – produce agriculture, mining or manufactured products for consumption elsewhere or provide tourism or higher-order education/health care services to visitors/temporary residents
- the potential for growth of a local community's economic base jobs is identified through assessing how many such jobs exist today and how many might exist in the future drawing on *metroeconomics*' extensive forecasts of economic base industrial job trends nation-wide and province-wide
- an assessment is also made of the potential for residents to commute to jobs in nearby employment locations drawing on existing patterns and *metroeconomics*' base case forecasts of such jobs by sub-provincial area across the country
- the potential for job growth within the local area and job growth in nearby locations determines the potential for job growth among residents
- the *metroeconomics* system ties this resident job growth potential to the demographic side of the community; if potential job growth among residents exceeds the current supply of workers (based on age and gender assessment of the current population, age-specific rates of labour force participation, the level of unemployment, and the need to replace retiring workers), in-migration occurs; thus job growth potential determines population growth potential recognizing that each new job-holding resident typically brings along one or two dependents
- the system further takes into account the fact that each new resident job-holder increases the need for workers who service the local population – the community base jobs – and that these additional community base jobs, in turn, create the need for more workers, more residents, etc.
- employed residents growth, in other words, drives the community's net in-migration requirements which, along with standard assumptions regarding fertility and mortality rates, provide the parameters needed to develop local area population projections by age and gender
- projected economic base jobs by industry are added to projected community base jobs by industry to determine the total number of jobs by place of work that will exist in the community in the decades ahead

The Location Quotient procedure is carried out as follows:

- All jobs in agriculture and forestry, mining and oil and gas extraction, and manufacturing are considered to be economic base jobs as most of their production is consumed by businesses and people outside of the area
- For all other industries, the number of jobs per 1,000 residents in the Calgary CMA is compared to that ratio across all 32 CMAs in Canada as a group. Where the ratio in an industry in the CMA exceeds that of all CMAs, it is assumed the excess jobs in the Calgary CMA are providing services to people or businesses outside of the CMA. These excess jobs are defined as export-based service jobs and their output as exportable services, Expand on the region,

4. Labour Demand and Supply Assessment

4.1 Introduction

The real-time Jobs Demand Report's intelligence-gathering system provides ongoing monitoring of online job postings with extensive quality assurance to analyze and compile each local job demand report. The Data Warehouse and Reporting Engine allow for the monitoring of the on-line local job market within the province of Alberta. This technology permits the extraction of relevant information about each online job posting, including but not limited to the following metrics:

- Job Location
- Employer and employer industry (NAICS)
- Occupational Category (NOCS)

All labour demand and labour supply data provided in the following sections correspond to the job posting and job seekers published between **March 1, 2019, to February 29, 2020.** This report presents data for the following geographies:

- SouthGrow Region (Alberta)
- Southwest Alberta
- Study Area (aggregate of SouthGrow and Southwest Alberta)

4.2 Summary of Key Findings

- A total of 9,190 job postings and 9,152 job seekers were recorded in the study area between March 1, 2019, to February 29, 2020.
- The labour demand and supply trends were mostly driven by those in the SouthGrow Region. The city of Lethbridge itself accounted for 72% of job postings and 77% of job seekers.
- Healthcare and social assistance was the industry sector, with the most significant number of job postings. On the other hand, accommodation and food services recorded the most significant number of job seekers.
- Occupations in sales and services recorded the most significant number of job seekers and job postings in the study area.
- Most of the job postings tracked require at least a college diploma or certification. At the same time, most job seekers said to have a college diploma or certification.
- Skills in demand include:
    - General/soft skills: communication and customer services.
    - Specialized skills: sales and office administration.
    - Technologies: Microsoft office package
    - Tools and equipment: Forklifts and power tools.

4.2.1 Labour Demand and Supply Trends

Between March 1, 2019, and February 29, 2020, a total of 9,190 job postings were published in the study area. Most of these jobs were posted on the employer corporate websites, followed by Indeed.ca and Service Canada Jobbank.

Figure 49: Total job postings by data source – March 1, 2019, to February 29, 2020

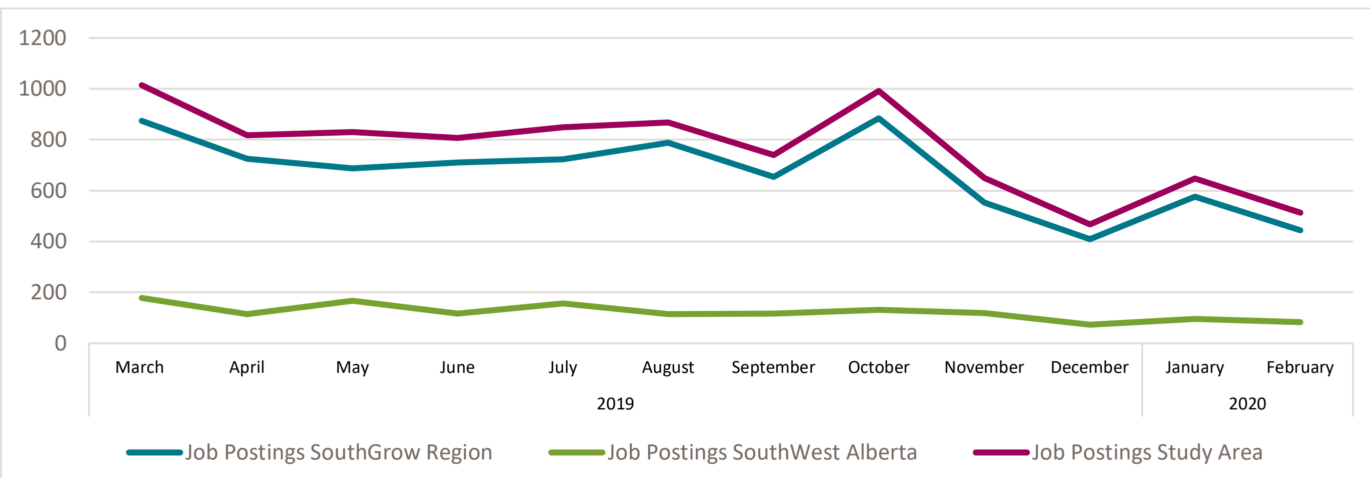
Data Source	Study Area	%
Employer Corporate Websites	4,888	53%
HCareers.ca	1	0%
Indeed	2,581	28%
JobServe	325	4%
Monster	314	3%
Service Canada Jobbank	1,081	12%
Grand Total	9,190	

Source: Vicinity Jobs

The figure below shows the job postings by month. In the study area, March 2019 had the most significant number of job postings (1,014 postings. Meanwhile, December 2019 had the lowest quantity of job postings (467 postings). The figure also evidences that most of the job postings were driven by the job posting trends in the SouthGrow Region.

The SouthGrow Region recorded a total of 8,023 job postings, and Southwest Alberta recorded a total of 1,466 job postings.

Figure 50: Total job postings by month – March 1, 2019, to February 29, 2020

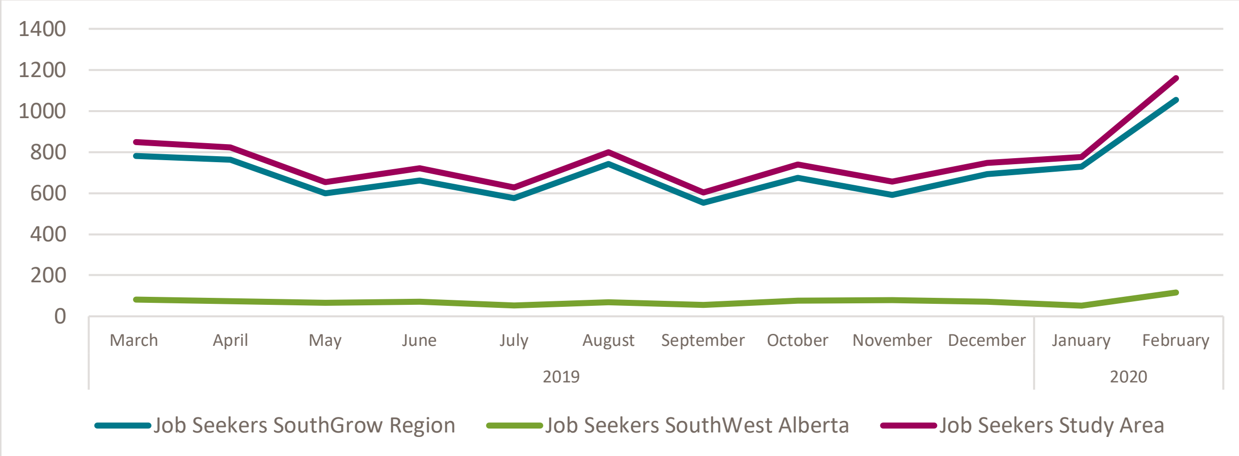


Source: Vicinity Jobs

In terms of job seekers, the study area recorded a total of 9,152 job seekers. Most of these job seekers were concentrated in the SouthGrow Region (8,415 job seekers). Southwest Alberta recorded a total of 867 job seekers.

The study area recorded the most significant number of job seekers in February 2020. Meanwhile, the month with the lowest quantity of job seekers was September 2019. Similar trend lines are observed between job seekers in the study area and the SouthGrow Region.

Figure 51: Total job seekers by month – March 1, 2019, to February 29, 2020



Source: Vicinity Jobs

4.2.2 Labour Demand and Supply by Location

In terms of specific locations, the city of Lethbridge recorded the most significant number of both job postings and job seekers in the whole study area. This community recorded 72% of job postings and 77% of job seekers in the study area.

Figure 52: Job posting and job seekers by location – March 1, 2019, to February 29, 2020

	Study Area			
Location	**Postings**	**%**	**Seekers**	**%**
Lethbridge, City	6,597	72%	7,071	77%
Taber, Town	574	6%	434	5%
Pincher Creek	464	5%	159	2%
Claresholm	239	3%	145	2%
Coaldale	207	2%	382	4%
Fort MacLeod	183	2%	138	2%
Cardston, Town	176	2%	103	1%
Blairmore	140	2%	71	1%
Mountain View	104	1%	12	0%
Picture Butte	97	1%	63	1%
Raymond	81	1%	145	2%
Nanton	71	1%	129	1%
Milk River	69	1%	24	0%
Crowsnest Pass	46	1%	20	0%
Vauxhall	33	0%	38	0%
Milo	29	0%	13	0%
Coleman	24	0%	75	1%
Siksika	23	0%	43	1%
Glenwood	19	0%	15	0%
Diamond City	7	0%	6	0%
Stirling	4	0%	60	1%
Mossleigh	3	0%	6	0%
Grand Total	**9,190**		**9,152**	

Source: Vicinity Jobs

4.2.3 Labour Demand and Supply by Industry Sector

In the SouthGrow Region, most of the labour demand took place in retail trade and health care and social assistance (19%, respectively). Meanwhile, most of the labour supply was in the accommodation and food services sector (29%).

On the other hand, the Southwest Alberta region saw most of the labour demand in health care and social assistance (almost 43% of job postings). Most job seekers in this area were in the accommodations and food services (33%).

Figure 53: Job postings and job seekers by industry sector (2-digit NAICS)

	SouthGrow Region		Southwest Alberta	
NAICS	Job Postings (1)	Job Seekers (2)	Job Postings (3)	Job Seekers (4)
11 - Agriculture, Forestry, Fishing and Hunting	0	5	43	
21 - Mining and Oil and Gas Extraction	2	19	1	4
22 - Utilities	3	4	4	1
23 - Construction	38	44	3	7
31-33 - Manufacturing	421	292	37	15
41 - Wholesale Trade	100	111	10	9
44-45 - Retail Trade	749	384	139	16
48-49 - Transportation and Warehousing	65	85	5	11
51 - Information and Cultural Industries	104	36	1	2
52 - Finance and Insurance	283	68	30	7
53 - Real Estate and Rental and Leasing	32	18	20	4
54 - Professional, Scientific and Technical Services	252	80	7	10
56 - Administrative and Support, Waste Management and Remediation Services	112	41	26	4
61 - Educational Services	445	298	1	21
62 - Health Care and Social Assistance	747	149	323	26
71 - Arts, Entertainment and Recreation	18	21	12	2
72 - Accommodation and Food Services	388	702	55	70
81 - Other Services (except Public Administration)	42	26	25	2
91 - Public Administration	47	18	3	1
Grand Total*	3,848	2,401	745	212

Source: Vicinity Jobs

Notes

(1) Number of Postings applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 4,175

(2) Number of Job Seekers applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 6,014

(3) Number of Postings applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 721

(4) Number of Job Seekers applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 655

In terms of specific industries, most of the job postings in the SouthGrow Region were in general medical and surgical hospitals, depository credit information, and department stores. Meanwhile, most of the job seekers were in the full-service restaurants and limited-service eating places, food services and drinking places, and traveller accommodation.

Figure 54: Top 10 job postings and job seekers by industry sector (4-digit NAICS) – SouthGrow Region

NAICS	Postings	NAICS	Seekers
6221 - General Medical and Surgical Hospitals	718	7225 - Full-service restaurants and limited-service eating places	297
5221 - Depository Credit Intermediation	204	722 - Food Services and Drinking Places	238
4521 - Department Stores	179	7211 - Traveller Accommodation	165
6112 - Community Colleges and C.E.G.E.P.s	163	6100 - Educational Services (unknown sub-category)	162
6113 - Universities	110	6221 - General Medical and Surgical Hospitals	111
5416 - Management, Scientific and Technical Consulting Services	108	4521 - Department Stores	101
4481 - Clothing Stores	100	6113 - Universities	84
3121 - Beverage Manufacturing	98	4800 - Transportation and Warehousing (unknown sub-category)	59
7225 - Full-service restaurants and limited-service eating places	95	4441 - Building Material and Supplies Dealers	54
5616 - Investigation and Security Services	82	4461 - Health and Personal Care Stores	53

Source: Vicinity Jobs

Southwest Alberta also experienced a high labour demand in sectors such as general medical and surgical hospitals; and department stores. The fishing sector also was at the top by labour demand.

The job seekers in the area looked mostly for jobs in the traveller accommodation and educational services sector.

Figure 55: Top 10 job postings and job seekers by industry sector (4-digit NAICS) – Southwest Alberta

NAICS	Postings	NAICS	Seekers
6221 - General Medical and Surgical Hospitals	308	7211 - Traveller Accommodation	25
4521 - Department Stores	109	6100 - Educational Services (unknown sub-category)	18
1141 - Fishing	43	6221 - General Medical and Surgical Hospitals	17
5221 - Depository Credit Intermediation	28	7225 - Full-service restaurants and limited-service eating places	17
5616 - Investigation and Security Services	24	4521 - Department Stores	7
7225 - Full-service restaurants and limited-service eating places	22	4800 - Transportation and Warehousing (unknown sub-category)	7
5312 - Offices of Real Estate Agents and Brokers	20	2382 - Building Equipment Contractors	5
3121 - Beverage Manufacturing	17	5413 - Architectural, Engineering and Related Services	5
6233 - Community Care Facilities for the Elderly	12	4143 - Home Furnishings Wholesaler-Distributors	4
4451 - Grocery Stores	11	5221 - Depository Credit Intermediation	4

Source: Vicinity Jobs

4.2.4 Labour Demand and Supply by Occupational Category

In all the geographies (SouthGrow Region and Southwest Alberta), the sales and service occupations recorded the highest labour demand and the most significant labour supply. 30% of SouthGrow's job postings and 32% of Southwest Alberta's job postings were in sales and services.

25% of SouthGrow's job seekers and 23% of Southwest Alberta's job seekers were in sales and services.

Figure 56: Job postings and job seekers by occupational category (1-digit NOC)

	SouthGrow		SouthWest	
NOC	Job Postings	Job Seekers	Job Postings	Job Seekers
0 - Management occupations	916	567	109	64
1 - Business, finance and administration occupations	791	560	136	54
2 - Natural and applied sciences and related occupations	121	116	22	19
3 - Health occupations	972	250	342	22
4 - Occupations in education, law and social, community and government services	486	370	59	34
5 - Occupations in art, culture, recreation and sport	93	169	18	15
6 - Sales and service occupations	2,371	2,065	473	199
7 - Trades, transport and equipment operators and related occupations	752	1278	122	157
8 - Natural resources, agriculture and related production occupations	117	111	32	17
9 - Occupations in manufacturing and utilities	137	172	16	11
Other / Unidentified	1,267	2,757	137	275
Grand Total	8,023	8,415	1,466	867

Source: Vicinity Jobs

In terms of specific occupations, most of the job postings in the SouthGrow Region were for retail salespersons, nurse aides, orderlies and patient service associates, and retail and wholesale trade managers.

On the other hand, most of the job seekers looked for positions such as cashiers, material handlers, and retail salespersons.

Figure 57: Top 10 job postings and job seekers by occupational category (4-digit NOC) – SouthGrow Region

NOC 4-Digit	Postings	NOC 4-Digit	Seekers
6421 - Retail salespersons	307	6611 - Cashiers	355
3413 - Nurse aides, orderlies and patient service associates	274	7452 - Material handlers	292
0621 - Retail and wholesale trade managers	217	6421 - Retail salespersons	261
6322 - Cooks	217	6322 - Cooks	200
3012 - Registered nurses and registered psychiatric nurses	182	6552 - Other customer and information services representatives	188
3233 - Licensed practical nurses	172	6623 - Other sales-related occupations	184
6311 – Food-service supervisors	169	0621 - Retail and wholesale trade managers	152
6411 - Sales and account representatives - wholesale trade (non-technical)	152	3413 - Nurse aides, orderlies and patient service associates	120
6235 - Financial sales representatives	128	7612 - Other trades helpers and labourers	120
6552 - Other customer and information services representatives	125	6711 - Food counter attendants, kitchen helpers and related support occupations	114

Source: Vicinity Jobs

The figure below shows that most of the labour demand in Southwest Alberta was in occupations such as nurses aides, orderlies and patient service associates; registered nurses and registered psychiatric nurses; ad licensed practical nurses. Meanwhile, the labour supply was most prominent in occupations such as material handlers, cashiers and cooks.

Figure 58: Top 10 job postings and job seekers by occupational category (4-digit NOC) – Southwest Alberta

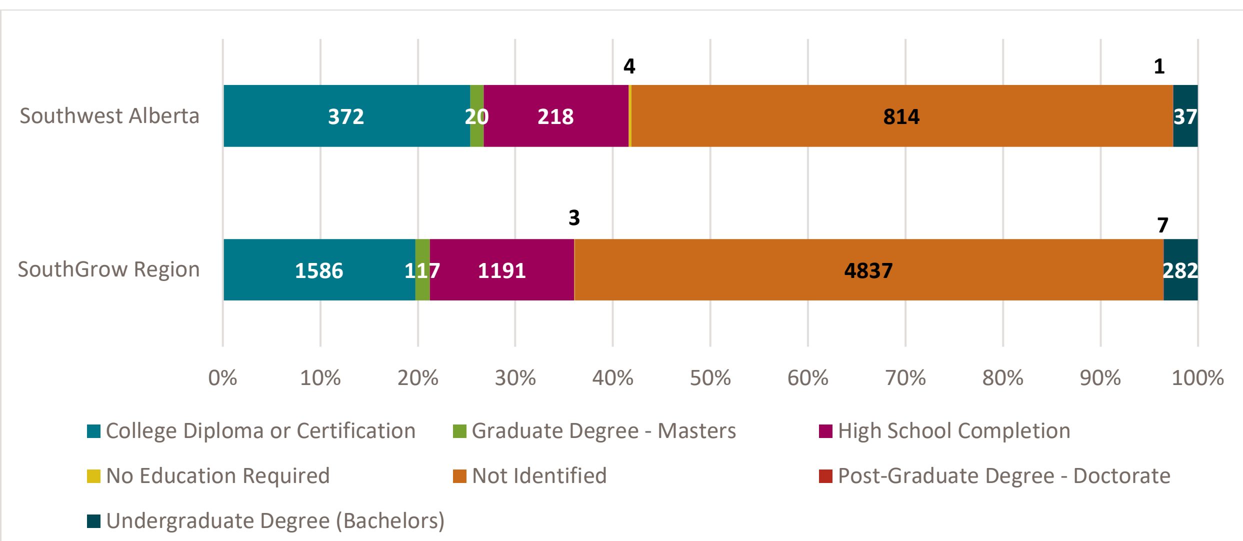
NOC 4-Digit	Postings	NOC 4-Digit	Seekers
3413 - Nurse aides, orderlies and patient service associates	98	**7452 - Material handlers**	30
3012 - Registered nurses and registered psychiatric nurses	93	**6611 - Cashiers**	29
3233 - Licensed practical nurses	59	**6322 - Cooks**	27
6322 - Cooks	50	**7511 - Transport truck drivers**	21
6421 - Retail salespersons	45	**6552 - Other customer and information services representatives**	17
6311 – Food-service supervisors	30	**6711 - Food counter attendants, kitchen helpers and related support occupations**	16
3414 - Other assisting occupations in support of health services	27	**6421 - Retail salespersons**	13
6222 - Retail and wholesale buyers	27	**6731 - Light duty cleaners**	12
6211 - Retail sales supervisors	25	**7237 - Welders and related machine operators**	12
6611 - Cashiers	20	**6623 - Other sales-related occupations**	11

Source: Vicinity Jobs

4.2.5 Labour Demand and Supply by Educational Requirements/Level

Most of the job postings in both areas required at least a college diploma or certification. The SouthGrow Region evidences a significant number of job postings requiring an undergraduate degree.

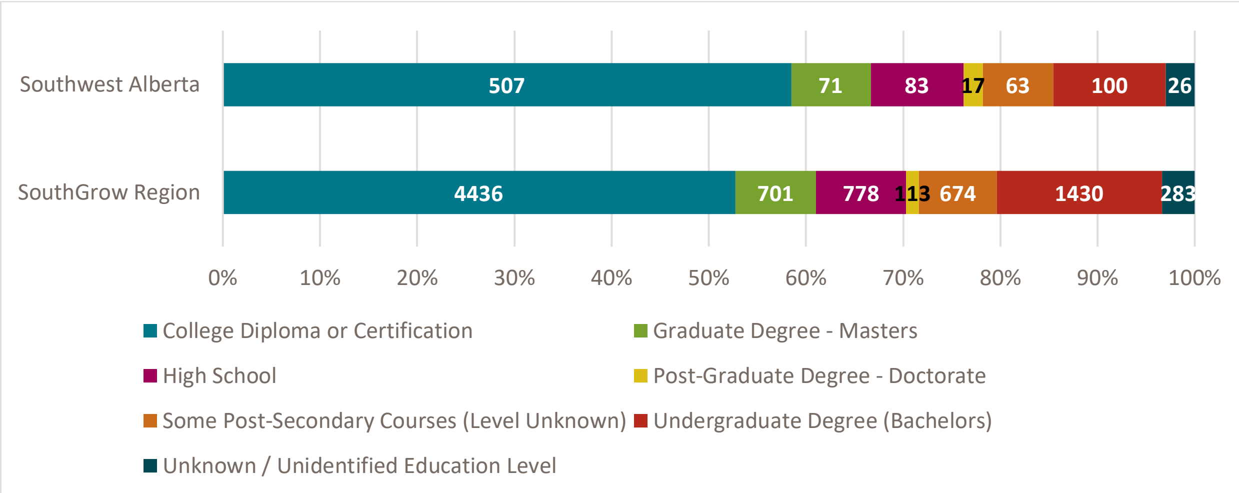
Figure 59: Job postings by educational requirements – SouthGrow Region and Southwest Alberta



Source: Vicinity Jobs

Turning to the educational level of job seekers, in both areas, most of the labour supply registered a college diploma or certification. The SouthGrow Region also recorded a significant number of job seekers with an undergraduate degree.

Figure 60: Job postings by educational requirements – SouthGrow Region and Southwest Alberta



Source: Vicinity Jobs

4.2.6 Labour Demand and Supply by Skills

The figure below shows the top skills for demand and supply in the SouthGrow Region. Skill groups are divided into general/soft skills, specialized skills, technologies, and tools and equipment

Figure 61: Top 5 skills by skill group – demand and supply, SouthGrow Region

Demand	Supply
General / Soft Skills	**General / Soft Skills**
Communication skills	Customer Service
Customer Service	Communication skills
Teamwork	Time Management
English language	Teamwork
Fast-paced Setting	Ability to Learn
Specialized Skills	**Specialized Skills**
Sales	Sales
Occupational Health and Safety	Office Administration
Budgeting	Accounting
Office Administration	Project Management
Analytical Skills	Inventory Management
Technologies	**Technologies**
Microsoft Office	Microsoft Office
Microsoft Excel	Microsoft Excel
Microsoft Word	Microsoft Word
Microsoft Outlook	Microsoft PowerPoint
Microsoft PowerPoint	Adobe Systems Adobe Photoshop
Tools and Equipment	**Tools and Equipment**
Forklifts	Forklifts
Power Tools	Power Tools
Conveyors	Boilers
Boilers	Skid steers
Disposal units	Lawnmowers

Source: Vicinity Jobs

The figure below shows the top skills for demand and supply in Southwest Alberta. Skill groups are divided into general/soft skills, specialized skills, technologies, and tools and equipment

Figure 62: Top 5 skills by skill group – demand and supply, Southwest Alberta

Demand	Supply
General / Soft Skills	**General / Soft Skills**
Customer Service	Customer Service
Communication skills	Communication skills
Teamwork	Time Management
Fast-paced Setting	Teamwork
English language	Ability to Learn
Specialized Skills	**Specialized Skills**
Sales	Office Administration
Budgeting	Sales
Office Administration	Accounting
Accounting	Occupational Health and Safety
Risk Management	Inventory Management
Technologies	**Technologies**
Microsoft Office	Microsoft Office
Microsoft Excel	Microsoft Excel
Microsoft Word	Microsoft Word
Microsoft Outlook	Microsoft PowerPoint
Customer relationship management CRM software	Intuit QuickBooks
Tools and Equipment	**Tools and Equipment**
Forklifts	Forklifts
Diesel engines	Power Tools
Navigation equipment	Backhoes
Alarm systems	Excavators
Boilers	Lowboys

Source: Vicinity Jobs

4.2.7 About Vicinity Jobs Data

"Real-time" labour market information (LMI) is generated by extracting information from publicly available online job postings. Since the Web has evolved as the primary media through which employers connect with job applicants, it houses information about a significant portion of the job openings that employers are looking to fill. By using continuously improved text-scraping and artificial intelligence technologies to extract intelligence from the content of those web postings, real-time LMI can gather, organize, categorize, and analyze the vast quantities of data in a very short period. Real-time LMI data include a vast volume of unstructured background information that employers provide to potential jobseekers through their current employment advertisements. These advertisements tell workers that employers plan to hire shortly to meet business needs, and they also describe the knowledge, skills, and abilities that a firm will require to succeed in the near-term future.

Organized and aggregated, this information provides a powerful tool that can help policymakers understand companies' short-term hiring plans and the factors influencing those plans. Current computing and data management technologies allow for quick data mining and processing, transforming raw job posting data into information that can be used for analysis. Data aggregated from job postings is cross-referenced against databases containing information about local employers and communities, to produce meaningful hiring demand reports by community, employer, and industry. In contrast to reports based on traditional reporting methodologies, which can take months or years to produce, real-time LMI reports are available within a few weeks. They enable analysts to monitor ongoing short-term job market trends as they unravel. In contrast, traditional public survey data usually only becomes available months or years after decisions have been made.

As with any other statistical analytic methodologies, it is very important to ensure the credibility of the analyzed data. For this reason, Vicinity Jobs / MDB have chosen only to process job postings advertised on websites that have deployed effective control processes to ensure the authenticity of job openings and the credibility of advertisers.

- Postings from free job boards that do not validate the authenticity of job openings (such as Kijiji and Craigslist) are not included in the Vicinity Jobs reporting service
- Postings from the Service Canada Job Bank are included because Service Canada verifies the employer's identity before accepting job postings (by requiring them to provide a valid CRA payroll ID).
- Significant sources of job postings are not added without prior notifications to users of the reporting system, accompanied by an analysis of the impact that the change is expected to have on overall numbers. Similar analysis and notifications are provided when a data source becomes unavailable.

However, real-time LMI is not produced by public data agencies, so it does not have the same quality standards as Federal statistical sources. Furthermore, because it is still experimental and likely biased in ways that are not clear, Federal data agencies have been slow to adopt the technology. The data focuses narrowly on the hiring outlook of those companies that advertise job opportunities on the web (rather than all employers). Private data providers, however, are experimenting extensively with real-time LMI. Despite these limitations, as businesses become increasingly comfortable with using the Internet as a worker recruitment tool and as analysts better understand the inherent biases of the data, real-time LMI can help to revolutionize the way data is collected and analyzed, including the speed at which insightful information is available to understand economic turning points and the characteristics of emerging trends.

5. Document Review – Common Threads Analysis

A detailed review of all relevant municipal reports and policy documents was conducted. Documents reviewed include:

- Lethbridge 2013 Economic Indicators of Industry
- Lethbridge Community Outlook 2015-2022
- Lethbridge Economic Trends & indicators Spring 2016
- Lethbridge Economic Trends & Indicators Fall 2016 Report
- Lethbridge Economic Trends & Indicators 2016 Year-End Report
- Lethbridge Labour Force Semi-Annual Update 2019
- Lethbridge 2019 Brighter Together Report
- Lethbridge Economic Trends & Indicators 10 years in Review
- Lethbridge Labour: Critical & Complex
- Calgary's Talent Needs: Challenges and Opportunities
- Taber: Growing Our Economic Future Regional Economic Development Strategy
- Sprouted: The plant ingredient opportunity taking root on the Prairies

5.1 Summary of Findings

The reviewed policies and documents have been analyzed comparatively to uncover areas of thematic overlap. The policies have been catalogued according to common themes to observe patterns – in essence, to find the "common threads" among them. All documents were read, and all relevant documents with workforce-related information were analyzed. The following observations are important, as they highlight themes that are strongly represented in the current workforce trends.

The common threads identified among the policies and documents examined above include:

Population and Workforce Size

Population growth is correlated with an expanding workforce, which should lead to greater prosperity. Lethbridge 2013 Economic Indicators of Industry mentions that more than 50% of companies surveyed expect to increase their workforce in the next year. The Lethbridge 2019 Brighter Together Report followed up by stating more than 40% of businesses expect to increase their labour force in the next 6-12 months, with a similar proportion projecting increased operational spending over the same time. The Lethbridge Community profile projects that by 2022 the total number of people employed within Lethbridge is expected to increase by just under 4,400 to a total of 49,096 and that employment growth may ultimately be limited by the rate of anticipated growth in population. The Lethbridge Economic Trends & Reports in spring, fall, year-end of 2016 and 10 years in review document all mentioned Lethbridge witnessed the most stable population growth of any mid- to large-sized Alberta city with an annual population growth that averaged 2.1% over the past decade. They also mentioned the participation rate in the Lethbridge-Medicine Hat Economic Region was 69.5% in 2016, up 2.3

percentage points on a year-over-year basis. The Lethbridge Brighter Together Business Report 2019 comments on the rising participation rate as a good indicator of economic health and suggest there is enough labour supply to meet the needs of employers.

Education and Training

The Lethbridge Labour: Critical & Complex document stated that since 2003 the labour force has shifted from those with skills in construction and mining to people with more university education and now over-education and over-skilling in some areas coexist with under-education and under-skilling for young professionals in other areas. Furthermore, long-term employment is leading to a lack of relevant skills for older employees at an increasing rate, especially for those who are not pursuing ongoing professional development. It was also mentioned in the report's survey that employers feel less than half of graduates are adequately prepared to enter the job market, and one in three employers reported difficulty filling positions as a result of a lack of suitable candidates. The document recommended the city focus on expanding just in time training and programs for in-demand jobs and opportunities for secondary and post-secondary students to learn about career paths and opportunities. The report also put a spotlight on the industry, providing training and engaging more students to consider in-demand jobs through marketing materials and participation in career fairs and speaking/mentorship opportunities. The Calgary Talent Need's document focused on the benefits of attracting international students and The Lethbridge Community Outlook dived further into the profile of the school and mentioned the expansion to the University of Lethbridge with a new building expecting to open soon. There were 8,296 students at the University of Lethbridge in fall 2015 and 6,524 students at Lethbridge College during the 2014-2015 academic year.

Sector Specific Job Trends

The Lethbridge Community Outlook document 2015-2022 mentions the three largest employment categories were retail, healthcare and social services, and accommodation and food services, which collectively make up 42.7% of all employment in Lethbridge. With eight of Lethbridge's largest employers being in the public sector, Lethbridge has benefited from growth in public administration, health and education. The report also mentions that mining and oil and gas extraction has a relatively small business footprint in Lethbridge and makes up only 0.26% of all employment in the City. The report concludes that the small number of energy companies located in Lethbridge explains why the recent downturn in oil prices has not had a large impact on the local economy when compared to the rest of the province. The Labour Force Semi-Annual Update 2019 and 2019 Brighter Together Business Report complements the information in the community outlook document by mentioning the three largest employment categories, retail, healthcare and social services are continuing to witness substantial labour force growth and the biggest loss in jobs was in construction. The Lethbridge Labour: Critical & Complex document mentioned the transportation sector as an example of a skills mismatch. A survey found there is a surplus of transportation employees at the provincial level and a deficit in Lethbridge. Calgary's Talent Needs: Challenges and Opportunities document purposes policy solutions around education and immigration to fill vacancies in the tech industry.

Ageing workforce

The Lethbridge Community Outlook document 2015-2022 mentioned that for every senior who is actively participating in Lethbridge's workforce today, there would be 2.2 people aged 65-plus by 2041. this means that the increasing participation rates in Lethbridge will only partially offset the impact of the great number of retiring baby boomers, which is part of a nation-wide trend. The Lethbridge Labour: Critical & Complex document focuses on older people who are still working, which is ageing the workforce. This is a particularly salient point in Alberta, where the employment rate among people over

65 years of age increased by over seven percentage points between 2003 and 2013 and now exceeds the national rate by over six percentage points. One study referred to in this report correlated the ageing workforce is a short-term advantage for employers to eliminate the costs of finding and training new employees.

Shortage of Skills and Labour

According to the Lethbridge Labour: Critical & Complex document, the top 20 shortages of labour were dominated by low- to medium-skill level occupations and represent jobs that are often filled by younger workers, recent immigrants or temporary foreign workers. On the other hand, the report mentions immigration programs that lead to permanent residency are more tailored to the professional class, and youth unemployment rates have increased in about 80% of developed economies, which suggests young people are three times as likely as adult workers to be unemployed. When the report focuses on Lethbridge, it finds that food & beverage, agriculture and trades/industrial were the top three job vacancies. Calgary's Talent Needs: Challenges and Opportunities document focuses specifically on the shortage of tech workers in the largest City close to Southwestern Alberta communities. The document mentions Calgary is feeling the pressure of filling the demand for tech talent with approximately 2,000 open technology jobs, and this is expected only to be the beginning of the demand curve for this Talent. A study in the report found that 36 percent of tech companies state the lack of digitally skilled Talent is inhibiting their plans for growth.

The figure below presents a common threads matrix, showing the association between each theme relative to the documents it has been identified in via a series of checkmarks. A single checkmark (✓) indicates the document has some content relating to the theme, but it is not a primary focus of the document, while a double checkmark (✓✓) indicates there is a primary focus on the theme.

Table 47: Common Threads Analysis

Common Themes	Population and Workforce Supply/Demand	Education and Training	Sector Specific Job Trends	Ageing Workforce	Shortage of Skills and Labour
Lethbridge 2013 Economic Indicators of Industry	✓				
Lethbridge Community Outlook 2015-2022	✓✓	✓✓	✓✓	✓✓	
Lethbridge Economic Trends & indicators Spring 2016	✓✓				
Lethbridge Economic Trends & Indicators Fall 2016 Report	✓✓				
Lethbridge Economic Trends & Indicators 2016 Year-End Report	✓✓				
Lethbridge Labour Force Semi-Annual Update 2019	✓		✓✓		
Lethbridge 2019 Brighter Together Business Report	✓		✓✓		
Lethbridge Economic Trends & Indicators 10 years in Review	✓				
Lethbridge Labour: Critical & Complex	✓	✓✓	✓	✓✓	✓✓
Calgary's Talent Needs: Challenges and Opportunities		✓✓	✓✓	✓	✓✓
Taber: Growing Our Economic Future Regional Economic Development Strategy	✓✓	✓✓	✓✓	✓	✓✓
Sprouted: The plant ingredient opportunity taking root on the Prairies		✓	✓✓		✓

6. Literature Review: A Continually Updating Section

Note: Given the unprecedented nature of the current COVID 19 crisis, this section has been updated from the phase one report to reflect the current Canadian policy environment, key workforce drivers, and commentary on emerging workforce trends as they relate to Southwest Alberta. Note, due to publishing lags and the rapidly changing nature of the economy during COVID-19, these numbers may fail to encapsulate the true magnitude of the economic downturn.

Our literature review includes relevant industry publications, leading research related to issues surrounding workforce development, labour market planning, and talent attraction and retention in a globalized and innovative labour market. This review includes sources such as the Global Talent Competitiveness Index, reliable publications on the war for talent, Deloitte Global Human Capital Trends, and Manpower Workforce Insights publications. Local economic and workforce development strategies and relevant provincial and federal publications and reports and labour market studies (Conference Board of Canada, Sector Councils, Service Canada), and professional reports have been reviewed.

6.1 Introduction

According to the International Monetary Fund (IMF), the global economy is expected to contract by at least 3 percent this year, contrasted against the anticipated 3.3 percent growth in January 2020. Within Canada, the downturn appears to be twice as big. However, growth is expected to rebound in the latter part of 2020 and during 2021. The forced closures of businesses worldwide have resulted in huge spikes in unemployment, with policymakers trying to respond to insulate workers from the worst of the impact.

Deloitte[5], a consultancy, found the economy contracted an annualized 8.3 percent in Q1 of 2020, and decreased by 39.8 percent in Q2. Growth mostly resumed in May, with the economy predicted to grow by an average of 27 percentage in the second half of 2020. Overall, the economy is estimated to contract by 5.9 percent but will rebound by 5.6 percent in 2021. Statistics Canada's most recent labour force survey[6] found that from February to April, 5.5 million Canadian workers were affected by the COVID-19 economic shutdown. Employment dropped by 3.0 million and a COVID-related increase in absences from work of 2.5 million. The unemployment rate as of June 2020 was sitting at 12.3%, down by 1.4% from May. Over the long term, the Centre for Economics and Business Research (CEBRE)[4] predicts that Canada will climb to 8th position in terms of the top world economies by 2034, fuelled by immigrant-led population growth.

This macro analysis indicates that although growth is occurring, labour shortages and mismatches are happening across Canada[7]. National talent trends are making it more difficult for businesses to source the workers they need to compete. Particularly in the tech sector where

[5] Deloitte, *Unprecedented in every way Economic outlook*, June 2020

[6] Statistics Canada, *Labour Force Survey*, June 2020

[7] Manpower Talent Survey, manpowergroup.com/media-center/news-releases/talent+shortages+at+record+high+45+of+employers+around+the+world+report+difficulty+filling+roles

companies are desperately seeking talent[8]. The following major demographic shifts exacerbate these trends:

- Ageing populations;
- Depopulation of rural areas;
- Increased urbanization;
- Increased talent mobility (over 250 million international migrants in 2015);
- Declining birth rates.

Globally, these conditions have created new challenges in both the attraction and retention of talent, with 42% of employers reporting difficulty filling jobs due to talent attraction issues[9]. Canada, in particular, faces the real risk of brain drain as only two of the top ten companies identified by Engineering/IT as their most preferred place to work were Canadian Companies[10].

These challenges have led to cities and regions, rather than countries, developing more substantial roles as talent hubs. The growing importance of these sub-regions is due to their greater flexibility and ability to adapt to new trends and patterns where policy can be changed swiftly. Entrepreneurial talent can interact more readily with municipal systems than national policymakers[11].

This focus on more specific regions and firms have increased with the modern workforce's mobility and desire to qualify better where and how they work.

[8] Canadian Tech Companies Desparately Seeking Talent, theglobeandmail.com/business/careers/management/article-canadian-tech-companies-desperately-seeking-talent/

[9] Gartner Emerging Risks Survey, www.gartner.com/en/newsroom/press-releases/2019-01-17-gartner-survey-shows-global-talent-shortage-is-now-the-top-emerging-risk-facing-organizations Global Talent Shortage Survey

[10] Universum Canada Rankings 2019, universumglobal.com/rankings/canada/

[11] The Global Talent Competitiveness Index, 2019 Entrepreneurial Talent and Global Competitiveness, gtcistudy.com/wp-content/uploads/2019/01/GTCI-2019-Report.pdf

6.2 Global Workforce Drivers

The following section of this report describes critical global, national, and provincial workforce trends identified within the literature.

6.2.1 International and National Key Trends

COVID 19 – Comprehending and Overcoming the Most Significant Economic Challenge of Modern Times

The global economy and the future of workforce development is currently being challenged like never before. Coronavirus or COVID-19 is not only a health crisis of great severity, but it is also the most significant economic threat since the global financial crisis of 2007-08. While the economic fallout from the COVID-19 pandemic is still far from clear, economists worldwide are predicting that millions of jobs could be permanently removed within the coming months.

Research from the World Bank[12] predicts that the required lockdowns in Europe and across the US to control the virus will result in a 5.2 percent contraction in global GDP in 2020. The report argues that the crisis highlights the need for urgent action to cushion the pandemic's health and economic consequences, protect vulnerable populations, and set the stage for a lasting recovery. The pandemic is predicted to push most countries into recession in 2020, with per capita income contracting in the most considerable fraction of countries globally since 1870. Canada and other advanced economies are projected to shrink 7 percent.

Recent evidence now suggests that the trough in economic activity resulting from COVID-19 may have occurred in April. Governments and consumers are now starting to plan how the economy should reopen in a world still hampered by the virus. Policymakers' focus has now shifted from reacting to the virus into recovery mode. With the Canadian summer soon ending and the new school year about to begin, the question is being asked, "what are, and are we comfortable with the trade-offs from reopening the economy?". Perhaps the biggest takeaway is that whatever the future direction is, governments, businesses, and consumers will increasingly have to turn towards technology to provide innovative solutions to overcome these challenges.

The Threat and Unpredictability of Automation on Workforce Development

Another critical challenge identified within the literature review is the growing threat of automation on jobs and the required workforce skills. However, the inherent unpredictability of technology change means quantifying the impact automation will have on job losses is extremely difficult. Consolidation of research by The Future Skills Centre[13] found that jobs at risk of automation range anywhere from 6%-59% depending on the country, industry, and methodology used. For example, one study by McKinsey[14] found that globally, 49% of

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[12] World Bank, The Global Economic Outlook During the COVID-19 Pandemic: A Changed World, 2020

[13] Future Skills Centre 2020, *Understanding The Future of Skills: Trends and Global Policy Responses*, https://fsc-ccf.ca/research/understanding-the-future-of-skills-trends-and-global-policy-responses/

[14] McKinsey & Company 2017. *A future that works: Automation, employment, and productivity*. https://www.mckinsey.com/featured-insights/digital-disruption/harnessing-automation-for-a-future-that-works

activities that workers are paid to do could be automated using existing technology. However, less than 5% of occupations are susceptible to total automation, and for about 60% of occupations, at least 30% of the activities involved are technically automatable today. From a national perspective, the critical finding is that 42% of Canadian jobs are at a high risk of automation and 36% at low risk. However, only 1% of Canadian jobs were found to be 100% automatable[15]. Overall, while the degree of jobs at risk by automation is unclear, what is clear is that automation is and will continue to change the workforce landscape drastically.

Routine and Manual Tasks are at the Highest Risk of Automation

Another theme identified within the literature is that tasks and jobs that are routine, whether that be manual or cognitive[13], are most at risk of automation. Any codifiable tasks[16]which a computer could complete will likely be automated over the coming years with immigrants and low-skilled workers, particularly at risk.

The Shift Towards Temporary and Contract Positions.

As research indicates that the complete automation of jobs is unlikely in the short term, occupations and jobs will increasingly be separated into discretely defined tasks. When combined with digital platforms that enable the instant skill and job matchmaking, a more fluid piecework-based labour market will likely occur within an increase in contract workers[13]. For example, a World Economic Forum survey[17] found that 50% of major companies surveyed are expected to cut their permanent workforce, while 48% are expected to hire specialist contractors instead of employees. Only 38% are expected to grow their permanent workforce. Overall, this could place additional pressure on government social supports, such as pensions and private health benefits, as more workers struggle to make ends meet between contracts.

On the flip side, the rise of automation will increase the number of remote workers. This shift presents an opportunity for municipalities to offer economic incentives to try to attract people to live and spend within their region[18]. Flow on effects could include drastic talent increases and decreases across regions, depending on the number of lifestyle-related amenities and services that municipalities could offer to draw in remote workers.

Businesses are Less Willing to Train, and New Graduates Have Less Experience

Businesses had become increasingly more critical of new graduates and less willing to train them; in 1979, the average worker would receive 2.5 weeks of training per year, compared to 11 hours in 1995[19] and 2011 when only a fifth of workers reported receiving on the job training in the past five years. This situation has been compared to the tragedy of the commons, wherein society is better off with

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[15] Brookfield Institute for Innovation + Entrepreneurship (2016), *The talented Mr. Robot: The impact of automation on Canada's workforce*. https://brookfieldinstitute.ca/report/the-talented-mr-robot/

[16] The World Bank 2019. *World Development Report 2019: The changing Nature of work*. https://www.worldbank.org/en/publication/wdr2019

[17] World Economic Forum 2018, *The Future of Jobs Report*, http://www3.weforum.org/docs/WEF_Future_of_Jobs_2018.pdf.

[18] Policy Horizons Canada 2019. *The future of work: Five game changers*. https://horizons.gc.ca/en/2019/06/20/the-future-of-work-five-game-changers/

[19] Young Workers No Longer Get the On-the-Job Training They Need, entrepreneur.com/article/314468

trained workers. Still, companies want to shift the cost of training to individuals and their competitors. These factors combine with the graduation of a generation of students with the lowest percentage of work experience recorded. "In 1948 and 1978, 57% and 58% of 16-19 year-olds had a paid summer job. By 2017, only 35% reported having a summer job. The percentage of 15-17 year-olds who reported working in any fashion in the prior year has dropped from 48% in 1968 to a mere 19% in 2018. And the percentage of 18-21 year-olds reporting working in the prior year has dropped from 80% in 1968 to 58% in 2018."[20]

These trends create a perfect storm of graduates without experience and workplaces less willing or able to provide training, causing significant frustration on both sides.

Growing Evidence of Skills Mismatch both Domestically and Abroad

A growing body of evidence suggests a mismatch between the skills employers are looking for and the skills workers possess. Within the European Union, more than 20% of workers receive either more or less formal education than is required for their job[21].

Domestically, Canada's workforce is increasingly being driven by a demand for skills; rather then the qualifications the graduates possess, and workers are struggling to keep up with the changing demand. For example, recent research[22] has found that one-third of Canadians hold a qualification higher than what is required of their job, and 35% of employers report difficulty finding skilled workers.

Another study by McKinsey reports 40% of American employers can not find talent with the skills they need, even for entry-level jobs, and almost 60% complain of lack of preparation, even for entry-level jobs[23]. Deloitte and The Manufacturing Institute research reveals an unprecedented majority (89 percent) of executives agree there is a talent shortage in the US manufacturing sector, 5 percent higher than 2015 results[24].

However, a vital issue domestically is Canada does not have a cohesive data on the skills required. The recently introduced Skills and Competency Taxonomy by Employment and Social Development Canada (ESDC) is Canada's best-known framework for defining skill needs. Research indicates that more significant expansion and utilization of this tool will benefit policymakers in understanding skill gaps in local communities.

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[20] Why Aren't Graduates Ready For Work? They're The Least Working Generation In U.S. History, forbes.com/sites/brandonbusteed/2019/03/29/why-arent-graduates-ready-for-work-theyre-the-least-working-generation-in-us-history/#6e779e745e58

[21] OECD 2016, *Getting skills right: Assessing and anticipating changing skill needs*

[22] Skills Next 2020, *Solving the Skills Puzzle: The Missing Piece is Good Information*, https://ppforum.ca/publications/solving-the-skills-puzzle/

[23] Closing the skills gap, mckinsey.com/industries/social-sector/our-insights/closing-the-skills-gap-creating-workforce-development-programs-that-work-for-everyone?utm_source=Area+Development+Site+%26+Facility+Planning+Newsletters&utm_campaign=41aad6bef3-SFP_This_Week_377&utm_medium=email&utm_term=0_94850a8d43-41aad6bef3-302574205&goal=0_94850a8d43-41aad6bef3-302574205

[24] Deloitte and The Manufacturing Institute skills gap and future of work study, deloitte.com/us/en/insights/industry/manufacturing/manufacturing-skills-gap-study.html

A Surge in Demand for Digital Skills

Research from the McKinsey Global Institute found that automation will accelerate demand for technological skills[25]. The report predicts that by 2030 demand for technology skills will increase by 55% representing 17% of total hours worked, up from 11% in 2016. This unprecedented surge will affect both necessary digital skills, such as word processing and data entry, to more advanced skill sets such as programming. Canada's tech industry has emerged as being a key global destination for top tech talent and firms. Research by CBRE[26] found that the number of new tech jobs nationally increased by 161,700, or 24.1% over the past five years to 2019. The report indicated the key drivers behind this growth were the size of the talent pool, the high quality of labour, and the cost competitiveness of doing business in the Canadian market than the US. Regions such as Southwest Alberta, therefore, must continue to support local companies and workers who provide digital upskilling programs to ensure they remain competitive. According to a survey by Robert Half International Inc.,[27] more than 80% of roughly 2,800 tech-hiring decision-makers at US firms identified a lack of tech talent as a critical challenge, singling out data scientists as especially hard to find. According to Bain & Company, much of this demand will be sourced internationally. They estimate that the number of qualified candidates coming from India will climb to more than 200,000 by 2020, up from 65,000 in 2018, outpacing the talent supply in China, Western Europe, and North America[28]. Overall, this will create an opportunity for Canada as the United States becomes more hostile to immigration[29]. Businesses are already choosing their locations based on the availability of tech talent, with the most massive gains in tech real estate tied directly to graduation rates in specific programming[30].

Soft Skills are Increasingly Desired but Difficult to Obtain

According to a 2019 report published by LinkedIn[31], which surveyed 5,000 talented professionals across 35 countries, strong, soft skills – ones that are not easily replaceable by machines or Artificial Intelligence – are becoming increasingly valuable and sought after. The report found that 92% of talented professionals believe soft skills matter as much or more than hard skills when they hire, and 80% say they are essential to the company's success. The most important soft skills identified included creativity, persuasion, collaboration, adaptability, and time management[25]. However, despite the importance of soft skills, there is difficulty assessing them, with only 41% of respondents from the LinkedIn study having a formal measuring process in place. Traditional assessment methods such as interview questions and observing body language are not holding up, leading many companies to turn to online tools to better pre-screen

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[25] McKinsey and Company, 2019, *Skill Shift, Automation and the Future of the Workforce* https://www.mckinsey.com/~/media/McKinsey/Featured%20Insights/Future%20of%20Organizations/Skill%20shift%20Automation%20and%20the%20future%20of%20the%20workforce/MGI-Skill-Shift-Automation-and-future-of-the-workforce-May-2018.ashx

[26] CBRE 2019, *Scoring Canadian Tech Talent*, https://www.cbre.ca/en/research-and-reports/Canada-Scoring-Tech-Talent-2019

[27] Robert Half, roberthalf.com/salary-guide/technology

[28] Supply of Analytics Workers Set to Double, wsj.com/articles/supply-of-analytics-workers-set-to-double-11556663406?mod=article_inline

[29] Indian immigrants have it bad in Donald Trump's America, qz.com/india/1667098/indians-in-trumps-america-have-it-better-than-early-immigrants/

[30] STEM Grads: At the Core of the Tech Location Decision, areadevelopment.com/skilled-workforce-STEM/Q1-2018/computer-science-talent-drives-tech-location-decision.shtml

[31] LinkedIn 2019, *Global Talent Trends 2019*, https://business.linkedin.com/talent-solutions/recruiting-tips/global-talent-trends-2019?trk=bl-po

candidates and remove the opportunity for biases to enter the equation[32]. Municipalities are also being encouraged to provide more significant training opportunities to support critical sectors. An interesting related trend is the development of so-called Hybrid Jobs[33] or Skills[34] that combine skill sets that never used to be found in the same job, such as marketing and statistical analysis, or design and programming. These often marry soft and hard skills in new and adaptive ways as workers adapt to changing conditions.

Adaptive Work Schedules – Now, an Integral Part of Any Job.

As technology has evolved and industries change, more employees and businesses have switched to the online realm. There has also been an increasing trend of employees wanting more flexibility in the location and timing. According to a 2019 report by Mercer[35], a consultancy, adaptive work schedules is growing in importance with 54% of employees indicating that managing work/life balance is one of the top 5 things their employer can do to help them thrive at work (compared to 40% in 2018 and 26% in 2017). Similarly, LinkedIn[31] found that there's been a 78% increase in job posts on LinkedIn that mention work flexibility over the past two years and a 24% increase over the past four years in the number of people who consider flexible work arrangements as being a critical factor when choosing a new job. In the post-COVID-19 era, adaptive work schedules are increasingly being viewed favourably. A survey of 120 US Company executives and 1,200 US office workers from May 29 and June 4, 2020, found that that 72% of office workers would like to work at least two days a week remotely[36].

Generational Divide

Another critical global workforce driver is the presence of five generations within the workforce. This generational divide has seen a shift in leadership style from formal authority to leadership by influence. The prevalence of technology has resulted in a flatter world that allows for more immediate responses with millennials attracted to leaders who are relatable and accessible and thrive in teams working towards a common goal[37]. With research from Mercer[35] indicating that two in five employees are planning to leave their organization in the next 12 months, it is increasingly important for firms to craft a compelling value proposition to attract and retain valuable staff. Employers are increasingly focusing on providing inhouse training and development resources to help ensure staff have the skill set they need.

[32] What Is the Future of Work, areadevelopment.com/skilled-workforce-STEM/workforce-q4-2018/what_is-the-future-of-work.shtml?utm_source=Area+Development+Site+%26+Facility+Planning+Newsletters&utm_campaign=a7ffd763c8-SFP_Insider_1_18_2019&utm_medium=email&utm_term=0_94850a8d43-a7ffd763c8-302717633

[33] Hybrid Jobs, burning-glass.com/research-project/hybrid-jobs/?mod=article_inline

[34] The 'Hybrid' Skills That Tomorrow's Jobs Will Require, wsj.com/articles/the-hybrid-skills-that-tomorrows-jobs-will-require-11547994266

[35] Mercer 2019, Global Talent Trends 2019, https://www.mercer.com/content/dam/mercer/attachments/private/gl-2019-global-talent-trends-study.pdf

[36] Pricewaterhouse Coopers, *PwC's US Remote Work Survey*, June 25, 2020

[37] Adobe 2019, What Will The Future of Work Look Like? https://cmo.adobe.com/articles/2018/6/cwtk-what-will-the-work-place-of-the-future-look-like.html#gs.1fd8e4

6.2.2 National Outlook

Overview

As has been highlighted above, the rapid increase in technology and the effects of the current COIVD-19 pandemic are drastically reshaping Canada's economy and future of workforce development. As of July 26, 2020, over 8.46 million Canadians had applied for the CERB benefit scheme, with over $62.75B in benefits being paid out[38]. The Conference Board of Canada's forecast also reported the country's real GDP could fall 1.1 percent in 2020 and could shed 330,000 jobs over the second and third quarters with the unemployment rate to climb to 7.7%[39]. Key sectors, including tourism, retail, and household services, will be the hardest hit as consumer spending grinds to a halt. As is highlighted in the provincial outlook, a sharp decline in global oil prices to record lows is also compounding the problem.

COVID-19 Economic Response Plan

To combat this, on March 18, 2020, the Prime Minister announced a new set of economic measures to help stabilize the economy with $27 billion being allocated to support Canadian workers and businesses and $55 billion in tax deferrals. Amongst these initiatives, the most critical policies include the Canada Emergency Response Benefit (CERB) for individuals – providing $2,000 a month for up to 4 months for individuals who lose their income due to the virus – and the Wage Subsidy Program for Businesses, providing up to 75% of salaries up to a specified threshold. These measures have received a mostly positive response from the business community and residents. However, criticism has been raised, stating that the CERB benefit is too generous and disincentivizes lower-income workers from re-entering the job market. This disincentive leads to a peculiar situation where some employers are unable to find workers, despite unemployment being at record levels.

Municipalities Across Canada Respond

Alongside responses at the federal and provincial levels, municipalities across Canada have also been implementing their COVID-19 response plans to mitigate the impact on vulnerable worker populations and sectors. Notable local strategies include:

- **Edmonton Economic Recovery Grant[40]** – provides local businesses and business organizations with flexible funding to relaunch and strengthen their business models.
- **Red Deer Business Improvement Area (BIA) Tax Deferral[41]** – The City has extended property tax and BIA tax deferral until September 30, 2020.

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[38] Government of Canada, Canada Emergency Response Benefit statistics, 2020

[39] Conference Board of Canada, March 23 2020, https://www.conferenceboard.ca/insights/covid-19#economic-impact

[40] Edmonton, COVID-19 Response, 2020

[41] Red Deer, COVID-19 Response, 2020

- **Lethbridge Region Economy Recovery Task Force[42]: Lethbridge POST Promise[43] –** Implemented a marketing campaign whereby businesses can declare a POST Promise, a self-declaration that a business is working to help prevent the spread of COVID-19. They will then receive a logo, which is a nationally recognized symbol of businesses committed to protecting the local community.
- **Airdire Right for Business Support Program[44]** – The pilot will run May 21 to August 21, 2020, and is intended to provide Airdrie businesses with access to critical advisors and business service professionals to help them remain resilient through the COVID-19 pandemic.

Ahead by A Decade: Canadian Employment in 2030

The Brookfield Institute for Innovation and Entrepreneurship recently published a report outlining the future of employment in Canada up to 2030[45]. The 145-page document provides a detailed snapshot of crucial employment trends predicted to affect hiring decisions and which industries will decline or increase. One of the overarching insights from the report is that as Canada begins to recover from the COVID-19 pandemic thinking about the long term is now more critical than ever. The need to design policies and program supports that benefits Canadians in recovering from the crisis and ensuring they are at the forefront for the future of work is essential. Note, although a significant portion of the research for the report was conducted pre COVID-19, the insights are still insightful. The following lists relevant takeaways from the report.

- **Industries predicted to grow and decline** – A third of workers are currently employed in occupations with a high probability of change. Occupations in health, natural, and applied sciences are projected to grow, along with those with a high degree of service orientation and technical expertise. Occupations in manufacturing and utilities, however, are generally projected to decline by 2030. Strong support at all levels of government in helping workers upskill and transition industries is critical.
- **Essential skills and abilities –** The report identified five social skills and cognitive abilities that are foundational for the workforce of the future: fluency of ideas, memorization, instructing, persuasion, and service orientation. Greater focus on teaching these core skills in an educational curriculum must occur so that new graduates are prepared to enter the workforce. Workers will also need to become even more resilient to change and influence others in their behaviours, and learning as technology becomes more prevalent.
- **Job opportunities will not be equitable –** The report highlights the numerous inequities predicted to occur in the employment landscape by 2030. A wage gap will continue to exist with women earning significantly less than men ($33,552 versus $42,883), although they are less likely to work in industries expected to decline. Furthermore, nearly 50% of employees with a bachelor's degree or higher will work in an industry expected to grow, compared to 13% for those occupations predicted to decline.

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[42] Lethbridge Region Economy Recovery Task Force, business.chooselethbridge.ca

[43] Lethbridge, COVID-19 Response, 2020

[44] Airdire, COVID-19 Response, 2020

[45] Brookfield Institute for Innovation and Entrepreneurship, *Ahead by a Decade: Employment in 2030*, 2020

- **Immigrants to fuel economic growth –** The report discusses how first-generation immigrants are more likely to work in occupations likely to grow. This will be a crucial driver of workforce growth for Canada.
- **Recommended policy changes –** To ensure equitable access to meaningful job opportunities, the report recommends reducing barriers to education, such as reducing student debt or a push to create and recognize other qualifications and micro-credentials instead of only university degrees. Additionally, more flexible training options for older workers to ensure they stay engaged within the workforce is needed and that this training adapts to their level of technology literacy.

6.2.3 Provincial Outlook

Overview

According to the latest data published by the Government of Alberta[46], in June 2020, Alberta's seasonally adjusted unemployment rate was 15.5%, up 8.9% from the same time the previous year. This rate was the second-highest in Canada, behind Newfoundland at 16.5% and was above the national rate of 12.3%. Overall employment in goods-producing sectors (e.g., agriculture, forestry, fishing, mining, oil, and gas, etc.) grew by 9,300 jobs from May to June but is still 80,100 jobs lower than June 2019. Services-producing sectors (e.g., trade, transportation and warehousing, professional, scientific and technical services, etc.) also grew by 82,200 from May to June but is still 189,100 jobs lower than June 2019[47].

A report published by RBC predicts that Alberta, as well as Saskatchewan, are expected to enter recession due to the collapse of the crude oil price and a slowdown in other industries such as wholesale and retail trade affected by COVID-19. The report forecasts Alberta's GDP will decline by 2.5% in 2020, down from a slight gain of 0.3% last year. [48]

Uncertain future for Alberta's oil and gas sector

Alberta's economy has struggled to recover from the 2015-16 oil shock. The latest mix of virus-related financial uncertainty and dramatic oil demand reduction (e.g., reduced travel) has sent oil prices down to a low of US$30 per barrel. Although economic predictions from TD Bank anticipate a slight recovery in oil prices once the worst of the pandemic has hit, they have downgraded oil projections to between US$40 and US$50 a barrel over the next two years[49].

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[47] Open Alberta, June 2020, https://open.alberta.ca/dataset/6b9b6e8b-247f-4513-905c-b4f49b1261c4/resource/434f7e94-4f10-4c6d-966b-e6964c7a6a10/download/li-lfs-package-2020-06.pdf

[48] Royal Bank of Canada March 2020, https://royal-bank-of-canada-2124.docs.contently.com/v/provincial-outlook-march-2020?utm_medium=internal&utm_source=website&utm_campaign=prov+march

[49] TD Bank 2020, Provincial Economic Forecast, https://economics.td.com/provincial-economic-forecast

What is most worrying is the current Alberta budget relies on a US$58 assumption for world oil prices for this fiscal year, roughly $20 above current levels. This discrepancy, combined with exchange rate fluctuations, means the budget could deteriorate up to $5 -$5.5 billion across the next year. According to TD, this would cause a revised budget deficit target of $12 billion.

On a positive note, the economic impact from this drastic drop in oil prices is unlikely to have severe an impact on Alberta's economy as was felt during the 2015-16 price crash. Since 2014, the industry has undergone severe consolidation and restructuring as it shifts from its growth phase to its mature phase. There has been a slowdown in production growth, the number of new projects, and capital expenditure in addition to massive employment reductions.

According to a report from the Parkland Institute[50], a non-partisan public policy research institute, 2014 saw peak employment for the Canadian oil and gas industry. Since then, employment across the sector has decreased for three years before increasing slightly in 2018 and declining further in 2019. Overall, the industry has terminated an estimated 53,119 jobs from 2014-2019 and saw oil capital expenditure decreased by an estimated 64.6% during the same period. The unemployment rate among young men aged 15 to 24 years in Alberta as of June 6 is now at a whopping 30.9 percent, up almost 24 percentage points from the same time last year.[51]

The report also found that the industry slowdown has resulted in firms attempting to do more with less, with productivity per employee in Canada's oil sands industry growing by 72% from 2011 through 2019 and productivity in oil and gas overall 47%. This productivity increase and subsequent labour reduction have been primarily driven by technological innovations such as driverless haul trucks in the oil sands, more robust data analytics technology, and horizontal multi-well drilling pads. For Southwest Alberta, there exist some opportunities to develop specialized talent to service the ongoing maintenance of the oil patch over the coming years. However, these jobs will be minimal, and the industry is unexpected to recover to pre-2014 employment levels. It is, therefore, clear that other alternative industries must be explored to create jobs for residents.

Managing the Talent Shift from Oil and Gas to Renewables

The future of Alberta's oil and gas sector is being challenged like never before. The question now is not, 'When will the sector recover?' but rather, 'What will a transition away from oil and gas mean for workers in Alberta?'. There is mounting pressure for the Provincial and Federal governments to establish a clear talent transition strategy, but the reality of this transition is complicated.

A key barrier preventing workers from transitioning is that the renewable energy sector is not growing at the same pace that the oil and gas sector is shedding jobs. For example, a 2018 report estimated there would be 8,800 annual full-time equivalent jobs by 2030 in the solar industry[52], which, while significant, does not compare to employment loss across the oil and gas sector. The renewable sector is also only expected to see a sizeable initial spike in employment during the initial construction period, with only a handful of engineers required

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[50] Parkland Institute, The Future of Alberta's Oil Sands Industry 2019. https://www.parklandinstitute.ca/media_oil_sands_spending_and_productivity_figures_indicate_majority_of_lost_jobs_not_likely_to_return

[51] Government of Alberta, *Economic Dashboard Unemployment Rate*, 2020

[52] Solar Alberta, *Alberta's Solar PV Value Chain Opportunities Report*, 2018

for maintenance purposes in the long term. Large salary discrepancies are another key disincentive for those seeking work outside the oil and gas industry. For instance, an oil & gas project manager in North America earns an average of US$120,004, compared to the US$81,316 taken home by a wind farm project manager[53]. Overall, while it is clear that the clean energy sector cannot fully accommodate the job losses from oil and gas, it is apparent that the sector offers substantial employment opportunities. Local institutions (e.g., Southern Alberta Institute of Technology, University of Calgary, and Lethbridge College), which offer alternative energy program courses, should be supported and additional talent training courses created to help workers make this critical career transition. These courses could potentially be streamlined (e.g., no longer than 12 months), include practical placements, and have strong connections to employers, so job opportunities are easy to obtain. More significant promotion and perhaps even subsidies of these courses could also help workers make the transition.

Capitalizing upon Growth in the Plant-Based Protein Market

Will a meatless industry be a new source of job growth for Southwest Alberta? The COVID-19 pandemic disrupts the traditional meat processing industry, highlighting major health concerns and causing a future where protein is not sourced from conventional meat sources to be seriously considered. In Canada, more than 40% of the population is actively trying to incorporate more plant-based food into their diets. This growth has substantial economic repercussions with annual global sales of plant-based meat alternatives growing by an average of 8% a year since 2010, with projections forecasting that, in 25 years, 20% of meat will consist of plant-based and clean meat. Domestically, Canadian sales of plant-based protein products have grown by 7% to more than $1.5 billion in the 2016/17 fiscal year. Overall, plant-based protein is expected to contribute more than $4.5 billion in GDP growth for Canada[54].

The Canadian Prairies, including the Southwest Alberta region, is ideally positioned to become the world's 'protein basket,' with a competitive advantage in pulse fractionation, a new way of proceeding and extracting proteins to use as food ingredients and large areas of arable land. The Federal Government recently identified Protein Industries Canada (PIC)[55] as one of Canada's five innovation superclusters with the vision of positioning Canada as being 'a world leader in plant protein.' PIC is currently working with private sector industry partners to create co-investment projects that can transform the agriculture and food production sector and is expected to help generate an estimated $853 million in new commercial activity and upwards of 50,000 jobs. Key challenges preventing growth in the sector include outdated regulation, labour training, and infrastructure. Additionally, regulatory methods for measuring protein quality differ across regions, making it difficult for manufacturers to sell protein abroad.

The Plant Protein Alliance of Alberta (PPAA) is actively trying to overcome these challenges and make plant protein a critical economic driver of Alberta's economy. Canada currently exports nearly 95 percent of the agricultural products. It grows as raw commodities. Allison Ammeter, chair of PPAA and Pulse Canada, argues that "when we're shipping away raw products, we're shipping away jobs, we're shipping away GDP, and we're shipping away intellectual capacity — and then we're buying it all back again at full cost. We can be so

[53] Global Energy Talent Index, *The Global Energy Talent Index Report*, 2020.

[54] Government of Canada, *Plant-based protein market: global and Canadian market analysis*, 2019

[55] Protein Industries Canada, 2020.

much more."[56] She highlights the substantial job creation opportunities by bringing food production back and retaining the business and job growth in the local economy, which over the coming years, Southwest Alberta should be able to capitalize.

Importance of Agriculture

Agriculture is also a key component of Alberta's economy, earning 26% of Canada's farm cash receipts in 2015[57]. The wide diversity of landscapes and favourable climatic conditions means that the province supports various crops and livestock, with the Province recording over 43,000 farms in 2016 or 21% of Canada's total [58]. In 2016[59] the industry employed 33,498 full, part-time or seasonal employees and 57,605 farm operators. The Province's agricultural land base is also significant, with over 50.3 million acres that accounted for 31.7% of the national total in 2016.

Due to the high production volume, exports form a core part of Alberta's agriculture sector. In 2018, Alberta was the third-largest exporter of primary and processed agricultural and food products in Canada, exporting C$11.6 billion to international markets[60]. Alberta's strong international reputation drives these exports as a clean and safe food producer that consistently produces high-quality products. Recent changes to Canada's exchange rate and lowering of domestic demand will likely reduce growth within this sector moving forward. The Southwest Alberta region must continue to leverage Alberta's vital agriculture sector to secure steady employment for workers as the economy transitions moving forward.

[56] Alberta Seed Guide, *Plant Protein Alliance of Alberta Striving for a Paradigm Shift in Alberta Agriculture*, 2019

[57] Statistics Canada. Table 32-10-0436-01 Farms classified by total gross farm receipts in the year prior to the census

[58] Statistics Canada. Table 32-10-0403-01 Farms classified by farm type

[59] 2016 Census of Agriculture Summary, https://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/sdd16594/$file/Ag_Census_2016.pdf?OpenElement

[60] The Government of Alberta, Export Catalogue 2019, Accessed from: https://open.alberta.ca/dataset/d9d76bbb-b9de-429b-b8a8-d0ec5496ad08/resource/bbb07760-9914-4bc5-b2a1-3155cc3c1170/download/export-catalogue-web-july2019.pdf

6.2.4 Southwest Alberta

Nationally a focus on developing technology firms and talent has been a high priority over the past five years. The Information and Communications Technology Council's (ICTC) report *Digital Talent: Road to 2020 and Beyond,*[61] released in 2016, shares the tech talent and diversification themes of Alberta's recovery since the sustained downturn in oil prices has impacted the economy. As noted by Calgary Economic Development in their *Calgary in the New Economy*[62] , talent and innovation are seen as critical to the success of the region with four key initiatives:

- Create Canada's largest Talent accelerator,
- Establish Calgary as a magnet for students,
- Emphasize creativity and innovation from kindergarten to university, and
- Address immediate needs through attraction efforts.

The focus on talent in tech is a best practice and has been paying dividends for Calgary as the city has maintained its 6th place rank on CBRE's Scoring Canadian Tech Talent Index[63]. However, as noted in TD's Digital Divide Between Canadian Cities[64] , tech gains and economic growth are increasingly being concentrated in Canada's largest cities. To avoid this risk, the Southwest Alberta Skills Partnership needs to leverage Calgary's growing status at a tech hub to support regional, not concentrated growth. Critical takeaways for growing and retaining talent were compiled by Made in Canada: How to attract and retain top talent[65]:

- Increase opportunities for students. Expand co-op and internship opportunities.
- Start a mentorship or coaching program.
- Commit to digital literacy.
- Allow employees to grow.
- Demonstrate engagement in the community.

These actions echo a clear theme growing in the workforce development space of collaboration with employers to provide them with job-

[61] Digital Talent: Road to 2020 and Beyond, ictc-ctic.ca/wp-content/uploads/2016/03/ICTC_DigitalTalent2020_ENGLISH_FINAL_March2016.pdf

[62] Calgary in the New Economy, calgaryeconomicdevelopment.com/assets/Calgary-in-the-New-Economy/Calgary-in-the-New-Economy-Final.pdf

[63] 2019 Scoring Canadian Tech Talent, cbre.vo.llnwd.net/grgservices/secure/2019%20Canada%20Scoring%20Tech%20Talent%20EN-final.pdf?e=1585318024&h=3195a6fa9a222af7485383cc652e3d83

[64] The Digital Divide Between Canadian Cities, economics.td.com/bridging-the-digital-divide

[65] Made in Canada: How to attract and retain top talent, theglobeandmail.com/report-on-business/careers/leadership-lab/made-in-canada-how-your-organization-can-attract-and-retain-top-talent/article35654124/

ready employees, increasing their hands-on experience[66]. A significant component driving this is the disconnect between educators and employers; McKinsey & Company[67] reported 83% of educators felt youth are ready for work, 34% of employers and 44% of youth agreed. While the majority of this focus has been on new graduates, there has been significant research on continuing education to help those active in the workforce upgrade their skills to meet the needs of their current employers or switch to sectors with more opportunities.

Understanding which jobs are in demand is an essential aspect of the project, but focusing on the quality of jobs to pursue is a necessary component. Recently, Indeed, Canada published a report indicating the top in-demand jobs in Canada[68] , and four of the top ten are low paying with relatively low advancement opportunities. The Brookings Institute's Opportunity Industries Report[69] focuses on workers without a four-year college degree and the concentrations of "good jobs" (jobs that pay the area's median annual earnings and include health insurance) and "promising jobs," entry-level jobs that provide a pathway to good jobs). Understanding which career paths align with the promising and good jobs in the Southwest Alberta context will be essential to successfully promoting training opportunities in the skills that lead to higher quality employment. Particularly relevant in assessing the quality of work is the conversation around science, technology, engineering, and math (STEM) and highly digital occupations[70] , which have seen wages increase vs. other sectors of the economy with the same level of education[71].

A key challenge for many of the members of the Southwest Alberta Skills Partnership will be aligning their unique value propositions to the desires of the skilled workers they would like to attract and retain within their communities. According to a study by Area Development, millennials have made their preferences clear: 88 percent say they want to live in an urban environment within a close distance to their jobs[72]. With many of the partners representing more rural jurisdictions, a deeper understanding of what their target workforce wants will be critical to attracting them.

[66] Seeking Tech Talent, Companies Kickstart Apprenticeship Programs, wsj.com/articles/seeking-tech-talent-companies-kickstart-apprenticeship-programs-11580396400?mod=searchresults&page=1&pos=7

[67] Youth in transition Bridging Canada's path from education to employment, cacee.com/_Library/docs/Youth_in_transition_Bridging_Canadas_path_from_education_to_employment_2_.pdf

[68] Fastest-Growing SMB Jobs in Canada, blog.indeed.ca/2018/05/23/fastest-growing-smb-jobs-canada/

[69] Brookings Institute, Opportunity Industries Report, brookings.edu/wp-content/uploads/2018/12/2018.12_BrookingsMetro_Opportunity-Industries_Report_Shearer-Shah.pdf

[70] Digitization and the American Workforce, brookings.edu/wp-content/uploads/2017/11/metro_20171115_digitalization-and-the-american-workforce-infographic.pdf

[71] 7 facts about the STEM workforce, pewresearch.org/fact-tank/2018/01/09/7-facts-about-the-stem-workforce/

[72]The War for Talent, areadevelopment.com/skilled-workforce-STEM/workforce-q4-2018/war-for-talent-battle-for-employee-attraction-retention.shtml?utm_source=Area+Development+Site+%26+Facility+Planning+Newsletters&utm_campaign=69e910a516-SFP_Insider_12_20_2018&utm_medium=email&utm_term=0_94850a8d43-69e910a516-302717633

7. Appendix Background Document Review

1.1.1 Lethbridge 2013 Economic Indicators of Industry

Purpose: This report looks at economic indicators such as corporate revenues, current and anticipated workforce levels, export locations and areas of investment based on a 2013 survey. The survey was for 47 medium and large size companies in Lethbridge and included manufacturing, agri-food, supply chain and logistics, construction and information technology

Key Takeaways & Workforce Development Considerations

- On average, the largest employers who operate head offices in Lethbridge were in the sectors of construction and transportation
- The average reported an increase for companies that augmented their workforce (getting work done through IT) this past year was 13%. These companies were relatively well distributed across industries and sizes, with sizable increases being noted by both large and small organizations
- More than 50% of the surveyed companies employ less than 100 workers
- The majority of companies have maintained or increased their workforce in the past fiscal year with 51% increasing their workforce 26% maintaining their workforce 4% reducing their workforce
- Companies at the time of this report were anticipating comparable average growth of 12% (or roughly 260 new jobs) compared to the previous fiscal year

1.1.2 Lethbridge Community Outlook 2015-2022

Purpose: The Community Outlook Report evaluates the current state of the City of Lethbridge to provide a snapshot of how well the City is positioned to continue to prosper and to balance the needs of the community through time.

Key Takeaways & Workforce Development Considerations

- In 2015, the total number of people employed within Lethbridge was estimated to be 44,713 with a ratio of employees to the population of 0.47
- Population growth in Lethbridge has traditionally been stable, averaging about 1.7% annually.
- Unemployment in the Lethbridge-Medicine Hat region was 5% in 2015
- The participation rate of 67.2% was the highest annual figure since 2012 and growth is expected to be spread amongst the different employment categories relatively evenly

- By 2022 the total number of people employed within Lethbridge is expected to increase by just under 4,400 to a total of 49,096
- The reason for a projected decrease is due to an ageing population with more retirees living in Lethbridge who are no longer employed
- The major expansion to the University of Lethbridge is currently underway with a significant new building expected to open and expected to lead to educational services seeing the largest employment gain of any other city sector
- While increasing labour force participation rates are expected in the coming years, the lifecycle pattern of labour force participation declining through older age groups suggests that these increases will only partially offset the loss of labour supply as the baby boomers age towards retirement
- For every senior who is actively participating in Lethbridge's workforce today, there would be 2.2 people aged 65-plus by 2041
- Overall, South Lethbridge contains the majority of employment in the City with 24,802 or 56% of all employees working in this sector of the City, and North Lethbridge contains 15,785 or 35% of all employees
- West Lethbridge is the largest sector of the City in terms of population but is the smallest in terms of employment as only 4,126 or 9%
- The three largest employment categories were retail healthcare and social services and accommodation and food services. all told, these three categories composed 42.7% of all employment in Lethbridge
- With eight of Lethbridge largest employers being in the public sector, Lethbridge has benefited with growth in public administration, health and education
- Continued growth in traditional industries such as agri-business and manufacturing will also benefit Lethbridge in 2016 and 2017
- Most industrial type jobs such as those found in the Manufacturing, Transportation and Warehousing and Construction employment categories are found in North Lethbridge
- South Lethbridge where Lethbridge College is located has 41% of the City's total educational services staff, while West Lethbridge where the University of Lethbridge is located has 44%
- Educational services are a major strength in Lethbridge.
- There are few energy companies located in Lethbridge and helps to explain why the recent downturn in oil prices has not had a large impact on the local economy when compared to the rest of the province
- Mining and Oil and Gas Extraction has a relatively small business footprint in Lethbridge and makes up only 0.26% of all employment in the City
- Employment growth may ultimately be limited by the rate of anticipated growth in population

1.1.3 Lethbridge Economic Trends & indicators Spring 2016

Purpose: The report provides a snapshot of the type of economic information that we track to understand trends in areas such as new developments, labour force, housing markets and economic growth as of Spring 2016.

Key Takeaways & Workforce Development Considerations

- Public sector employment in Lethbridge remains strong, with nine of the top 10 major employers in health care, education, and government services. Public sector employment accounts for 20% of the employed workforce in the City.
- Lethbridge had the lowest average unemployment rate of all Alberta jurisdictions in 2015, with a 4.0% annual measure.
- Annual population growth in Lethbridge has averaged 2.1% over the past decade, which is in line with the stable growth that epitomizes our City.

1.1.4 Lethbridge Economic Trends & Indicators Fall 2016 Report

Purpose: The report provides a snapshot of the type of economic information that we track to understand trends in areas such as new developments, labour force, housing markets and economic growth as of Fall 2016.

Key Takeaways & Workforce Development Considerations

- Public sector employment in Lethbridge remains strong, with nine of the top 10 major employers in health care, education, and government services. Public sector employment accounts for 20% of the employed workforce in the City
- 2.1% population growth exceeds the five-year average in Lethbridge between 2011 and 2015 of 1.8%
- The provincial unemployment rate was up 2.8 percentage points compared with the first half of 2014 which is around the time that broad-based oil price declines were witnessed
- The unemployment rate in the Lethbridge-Medicine Hat region averaged 6.9% over the first half of 2016, the lowest comparable rate in the province over this time
- The participation rate in the Lethbridge-Medicine Hat region averaged 69% over the first six months of 2016, up 3.1% from the same time in 2015 and the largest appreciation for any Alberta region so far this year

1.1.5 Lethbridge Economic Trends & Indicators 2016 Year-End Report

Purpose: This report provides a snapshot of the type of economic information that we track to understand trends in areas such as new developments, labour force, housing markets and economic growth.as of the end of 2016.

Key Takeaways & Workforce Development Considerations

- Lethbridge witnessed the fastest annual population growth of any mid- to large-sized Alberta city that conducts an annual census in 2016 (2.1% growth in Lethbridge vs 0.4% in Calgary and -1.0% in Red Deer)
- For the second consecutive year, Lethbridge had the lowest annual unemployment rate (5.9%) of any Census Agglomeration or Census Metropolitan Area in the province in 2016
- The annual unemployment rate in Alberta was 8.2% in 2016, an increase of 2.2 percentage points from the year prior. This represents the lowest comparative figure since 1994
- The participation rate in the Lethbridge-Medicine Hat Economic Region was 69.5% in 2016, up 2.3 percentage points on a year-over-year basis. This was the biggest increase among all comparable regions in Alberta
- The annual participation rate in Alberta was 72.5% in 2016, the lowest comparative figure since 2001.

1.1.6 Lethbridge Labour Force Semi-Annual Update 2019

Purpose: The profile provides an overview of the labour force status in Lethbridge and an in-depth industry-based analysis.

Key Takeaways & Workforce Development Considerations

- The Lethbridge participation rate has been on the rise over the last few months
- Manufacturing and Health Care positions have been on the rise locally which represents positive momentum for the area
- Full-time job positions are down 7% compared to the year before which is a factor in higher unemployment in the first half of 2019
- The Manufacturing sector witnessed an uptick in jobs over the first half of the year, with employment in this industry up by an aggregate average of 2,000
- Health Care & Social Assistance (+1,400) and Wholesale & Retail Trade (+1,400) were other sectors witnessing substantial gains
- Throughout the first half of the year, Health Care was the second-largest local employer by industry (average of 20,500 employees) while manufacturing was fourth-highest (average of 12,800)
- The largest job losses were concentrated in Construction (-2000). With no substantial new projects yet announced, there is the potential this trend could continue
- Public Administration was another sector of importance that witnessed a retraction in employment over the first half of the year with jobs declining by 1,500

1.1.7 Lethbridge 2019 Brighter Together Report

Purpose: The report is based on a major employer's survey, which provides valuable information to potential businesses and the community regarding economic health. It also provides economic development organizations with information on how to help existing small to medium-sized businesses succeed and potentially grow into major employers if they are ready to take that step.

Key Takeaways & Workforce Development Considerations

- More than 40% of businesses expect to increase their labour force in the next 6-12 months, with a similar proportion projecting increased operational spending over the same period
- The total number of businesses has increased by 1% over the past two years
- Mid-sized businesses (defined here as 20-99 employees) witnessed the strongest growth
- There was a decrease of 3% in the number of major employers
- There was an increase of 4% in mid-sized and 1% in small businesses in the Lethbridge CMA between 2017-2019

1.1.8 Lethbridge Economic Trends & Indicators 10 years in Review

Purpose: This sector profile highlights the impact and opportunities for growth within the Region over the last ten years.

Key Takeaways & Workforce Development Considerations

- Lethbridge started to shed jobs in 2009 like the other cities, but that loss was not as severe or as quick as it was in the other comparable centers
- Lethbridge has the most stable population growth trend of all mid to large cities in Alberta with a Population grown of 1.5-2% per year

1.1.9 Lethbridge Labour: Critical & Complex – March 2015

Purpose: This whitepaper compares and contrasts the local and provincial labour situations and discusses the perspectives local employers have as well as the issues they face. It also includes a summary of recommendations put forth by experts and thought leaders to improve the current state of labour, from the perspective of business, education, and government.

Key Takeaways & Workforce Development Considerations

- From an international perspective, the main issues with regards to labour are a skills mismatch, persistent unemployment, and elevated youth unemployment
- From a national lens, the issues of priority include skill mismatch, elevated youth unemployment, cutbacks in worker training,

immigration effects

- Major trends include the increase of older employees in the workforce, longer hours for employees, a shortage of medium- to low-skill workers, and the effects of immigration-related to changes
- Local businesses remain most concerned about their inability to find qualified candidates and retain staff
- Elevated shortages are witnessed in the Food & Beverage, Trades & Industrial and Retail & Sales employment areas
- A skills mismatch can be linked to the impact of technology on modes of production and the disappearance of traditional manual low-skilled jobs
- Over-education and over-skilling coexist with under-education and under-skilling, and increasingly with skills obsolescence brought about by long-term unemployment
- Less than half of employers who were polled in a survey indicated that graduates are adequately prepared to enter the job market, and one in three employers reported difficulty filling positions as a result of a lack of suitable candidates
- Informal employment among young people remains pervasive, and transitions to decent worker are slow and difficult
- The increase of 18.8% from 2003-2013 of employment rate among people over 65 years old in Alberta exceeds the national rate
- The top 20 labour shortages are dominated by low to medium skill level occupations. That are typically filled by younger workers, recent immigrants or temporary foreign workers
- Top vacancies by job classification included trades and industrial, business, agriculture, food and beverage and retail and sales
- One area of recommendation focused on expanding just-in-time training and programs for in-demand jobs and enhancing opportunities for secondary and post-secondary students to learn about career paths and opportunities
- Another suggestion was to create more opportunities for students to meet and network with industry
- Suggestions for the industry included training apprentices and to offer incentives for staff willing to work with these employees, providing more training and engaging more students to in-demand jobs through marketing materials and participation in career fairs

1.1.10 Calgary's Talent Needs: Challenges and Opportunities

Purpose: This report lays out the present and potential future opportunities within the tech sector and challenges related to attracting tech workers to maximize entrepreneurship and foster growth for tech companies in the region.

Key Takeaways & Workforce Development Considerations

- The number of tech jobs in Calgary has increased by 5 percent in the past 12 months and 27.5 percent growth in employment of

Software Developers & Programmers in the same period

- Calgary is feeling the pressure of filling the demand for tech talent with approximately 2,000 open technology jobs. This is mentioned only to be the beginning of the demand curve for this Talent
- With a job growth rate in tech that doubles that of the overall economy in the coming years, total employment in key digital roles in Alberta is expected to surpass 77,000 by 2023
- Approximately half of all digital jobs in Alberta are and will be in Calgary
- 36 percent of tech companies in a survey stated that lack of digitally skilled Talent as inhibiting their plans for growth
- A problem that is not helping with the skills shortages the lack of adaptability in the post-secondary school system. This makes it harder to approve new degree/diploma programs and tougher to attract foreign students
- Ways of tackling a shortage of tech talent are to implement a technology talent stream for immigration which waives the need for Labour Market Impact Assessments and to speed up the process of bringing new post-secondary programs to market
- Ways of tackling the challenge in increasing number of tech entrepreneurs are to Increase the number of Startup Visa entrants into Alberta and create specialized immigration stream for angel investors

7.1.1 Growing Our Economic Future Regional Economic Development Strategy

Purpose: This report sets a roadmap for attaining a collective vision of growing economic prosperity, backed by a thoroughly researched and consultation-informed action plan framework. The Strategy applies to the Town of Taber, Municipal District (MD) of Taber and Town of Vauxhall, as well as communities across the region that stand to benefit from its strategic objectives.

Key Takeaways & Workforce Development Considerations

- Agriculture is an important section of the economy in the Taber region, and the large-scale acreages are well poised to take advantage of new advanced and precision agriculture techniques.
- Fracking in Southern Alberta provides an opportunity for cleantech firm attraction because there has been progressive investment in wastewater cleaning technologies by Canadian firms.
- As an agricultural hub, the Taber region is well positioned to develop its culinary tourism offerings.

7.1.2 Sprouted: The plant ingredient opportunity taking root on the Prairies

Purpose: This report highlights the demand for protein, including plant-based protein, and other plant-based ingredients, is

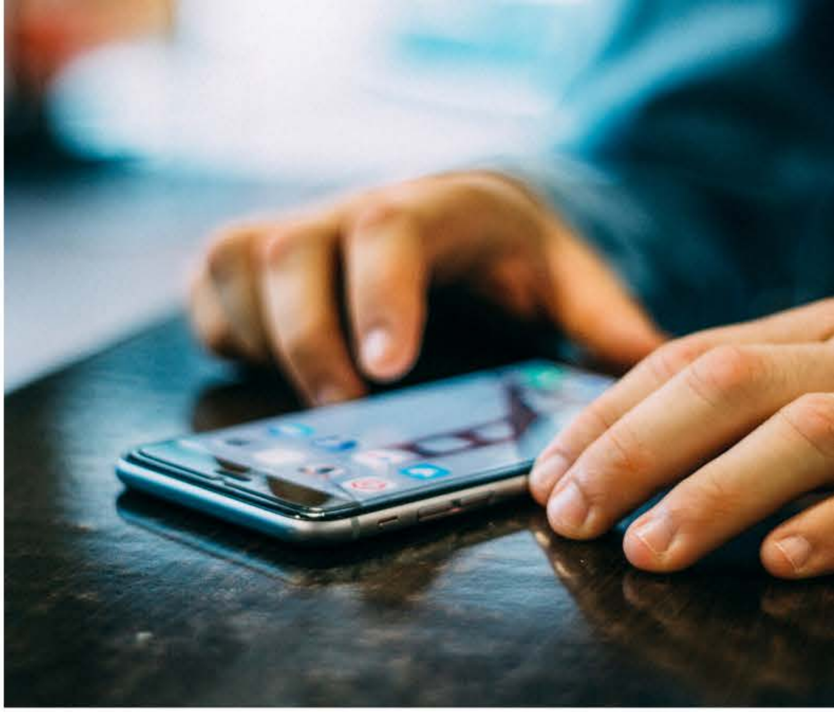
Growing and that Canada's Prairie provinces are well-placed to dominate the non-soy plant ingredient processing sector.

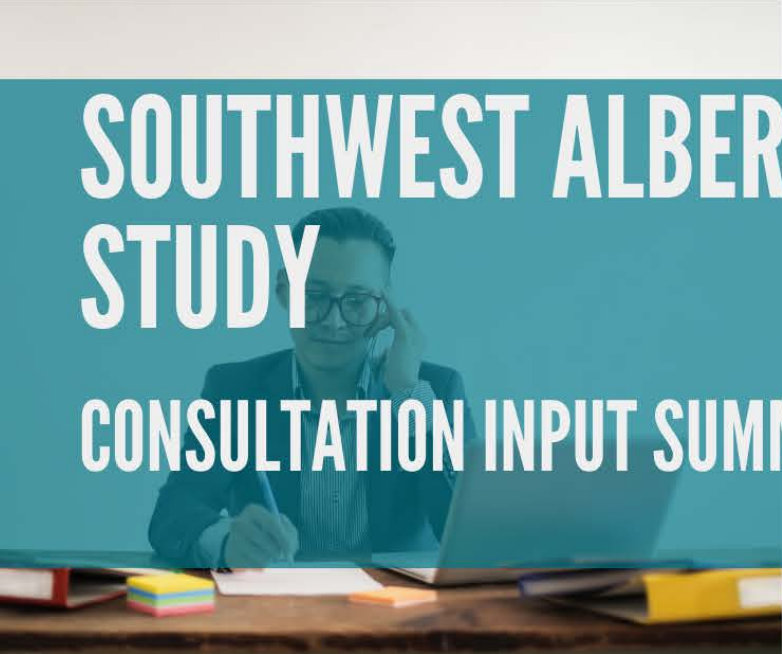
Key Takeaways & Workforce Development Considerations

- Plant-based protein and plant-based ingredients demand is rapidly growing, creating opportunities for primary production and value-added processing.
- In addition to food and beverages, plant-based ingredients are in high demand for use in nutraceuticals, pharmaceuticals, cosmetics, pet food and animal feed.
- The demand for plant-based protein alone is already valued at more than US$8 billion and growing rapidly, and this is only one of the ingredients that can be extracted from crops.

MDB
INSIGHT

MDB INSIGHT





SOUTHWEST ALBERTA REGIONAL SKILLS STUDY

CONSULTATION INPUT SUMMARY REPORT

Contents

1. Introduction

A wide range of inputs from approximately 780 individuals within Southwest Alberta has helped form this input summary report. Drawing from the extensive consultative initiatives that were held between February and June 2020, this report offers a synopsis of the emerging themes and priorities that have evolved through a comprehensive analysis of all inputs. It is these themes and priorities that reflect the perceptions of participants. The identification of these emerging themes and priorities is intended to inform the Southwest Alberta Regional Skills Strategy that will influence and inform planning and actions for the region and its municipalities over the coming years.

2. Stakeholder Consultations

Stakeholder consultation is essential to understanding what the needs and perspectives of stakeholder groups are in the Southwest Alberta Region. It shapes the nuanced understanding of the region and assists in grounding elements of the strategic planning process. The following engagement and consultation activities have contributed to this initiative:

	Regional Employer Survey Part One and Two: Employer surveys were completed across the Southwest Region through direct telephone interviews and supplemented with an online web link to allow for flexible participation. The activity was interrupted as a result of the emergency measures put in place due to COVID-19, resulting in a business shutdown. To best accommodate business participation, the survey activity was split into two timeframes to align with business closing and openings. Part one ran until mid-March, resulted in 309 completes. To achieve the goal of 400 total completes, the survey was relaunched in late May, resulting in an additional 95 completes, surpassing our goal. The part two survey was revised to include several COVID-19 specific questions to inform how the pandemic has influenced skills requirements. The surveys probed workforce demand, skills need, challenges, and immigration considerations.
	Regional Jobseeker Survey Part One and Two: Similar to the regional employer survey, the launch of the job seeker survey was interrupted as a result of the emergency measures put in place due to COVID-19. The survey targeted job seekers that were unemployed, underemployed, or employed and looking for new opportunities. The survey was available through a web-based linked and resulted in 56 online completes in Part 1, which launched in early March and closed in mid-March. For the relaunch in late May, the survey was revised to include additional questions that were focused on COVID-19 impacts. Part two resulted in 215 completes for a total of 271 completed surveys. The Southwest Alberta Skills Partnership organizations promoted the survey broadly across the region to maximize awareness and engagement and offered a prize draw to promote participation.
	Industry Roundtables: To garner direct input from local industry representatives, three industry roundtables were conducted with a focus on geography representation from SouthGrow, Southwest, and Lethbridge. Sessions were held via Zoom, with 35 participants

	across all three. Discussions informed on the labour market situation and talent pipeline in the region.
	Key Informant Interviews: A total of 35 key informant interviews were completed with identified stakeholders throughout the region; these included educational representatives, businesses, immigration service providers, local government, and workforce service providers.
	Education Roundtable: An education roundtable was conducted via Zoom to gather perspectives from education and training representatives on the labour market situation and talent pipeline in the region. A total of 12 individuals participated in this session.
	Immigration Roundtables: Working in collaboration with Lethbridge Local Immigration Partnership (LIP) / Lethbridge Family Services, two roundtables were conducted via Zoom. The first session engaged immigrant-serving organizations and some local businesses to gather perspectives on immigrant integration to the workplace and into the community. The second session engaged new immigrants to the region. A total of 20 individuals participated in these sessions.

The summary findings of the perceptions of those that contributed through the engagement activities follow. These observations reflect the views, perceptions, and opinions of the respondents.

3. Consultation Input Summary

Collected inputs provided local insights and perspectives necessary to inform strategic directions for a targeted and custom strategy and action plan, designed to identify solutions to the current skills gap in the area and strengthen talent attraction and retention. Key findings from these consultations are included in the following subsections. Detailed results, including breakdowns by the community, are in the Appendices.

3.1 Survey Results Key Findings – Business and Job Seekers

Two surveys were conducted to gain perspective on the local workforce and identify any gaps that exist in skills, experience, or training. The first was an online survey of local job seekers that was completed in two phases: the first from February - March 2020, and the second from May 15 - June 29, 2020. The second was a survey of local organizations that employ workers in the Southwest Alberta region, which was also done in two phases: February - March 2020, and June 1 – June 10, 2020. The first phase of each survey was collected before the COVID-19 pandemic in Canada, and the second phase was collected during the recovery phase.

For this reason, select COVID-19 impact-related questions were included in the second phase survey, and all questions were compared across the two phases. This summary showcases the key findings from both phases of the surveys, including an analysis of how the surveys changed over this period.

Business Optimism in the Region

Overall, businesses had very high satisfaction with operating a business in Southwest Alberta throughout both phases of surveys. For example, 91% of respondents reported they were 'very satisfied' or 'somewhat satisfied' with doing businesses in Southwest Alberta in the first pre-COVID-19 businesses survey, and 95% during the second phase survey.

Further, across all workforce factors that were rated in the business surveys, the respondents in phase 2 of the survey tended to have more positive perceptions than those in phase 1. Businesses rated all of the potential challenges to recruiting, hiring, and retaining employees as less of a factor. They also tended to respond that they were more satisfied with the workforce attributes mentioned.

Evidence of Skills and Experience Gaps

The phase 1 employer survey results strongly indicated evidence of a skill gap, with 48% of respondents indicating they had experienced a challenge during the recruitment or retaining of talent. Phase 2 results also supported this claim, with 57% of respondents stating that difficulties with labour retention was either 'very likely' or 'somewhat likely' to impact their decision to remain operating in the region. Furthermore, when asked to rate their level of satisfaction on several criteria, respondents were 'most dissatisfied' with the availability of experienced workers in their industry (11%) and the availability of a diverse workforce to recruit from (8%). However, the second phase survey results indicated that businesses' perceptions of local factors (e.g. talent availability, housing, transportation, etc.) had improved compared to the first phase results.

From a job seeker perspective, the critical insight from the phase 1 survey was that 85% of local job seekers had listed a lack of suitable job opportunities as 'a significant factor' or 'somewhat of a significant factor' hindering them from getting a job.

Phase 2 results also supported this insight, with 87% of respondents listing this as a critical issue preventing them from gaining employment. The phase 2 job seeker survey also found that a lack of adequately paying jobs was a contributing factor hindering their ability to gain employment, with 70% rating this as either 'significant' or 'somewhat significant.'

Need for Educational Programming and Training

An observation across both phases of surveys has been that while there is a relative abundance of employees with educational qualifications, employers do not feel this education is translating into a large adequately trained talent pool. For example, when asked about workers with the appropriate level of education, 25% of business survey respondents in phase 1 were extremely satisfied; however, 18% tended to be dissatisfied with the 'availability of a locally trained workforce.' In the phase 2 business survey, 32% indicated a high level of satisfaction regarding workers with the appropriate level of education; and 11% were 'very dissatisfied,' and 8% indicated the same regarding the availability of a trained local workforce. Overall, these results indicate that while employees may have solid educational qualifications on paper, their level of training and ability to 'perform ' into a job context is lower and would benefit from additional tailored training and support services.

From the perspective of a job seeker, this insight is also supported, with phase 1 results finding that 85% of job seekers thought a lack of suitable job opportunities as 'somewhat of a factor' or 'a significant factor' hindering them from getting a job. Interestingly, results from the phase 2 survey found that the impacts of COVID-19 rendered the respondents more likely to consider employment in occupations they had not considered in the past (79%).

Workforce Development Support Services are Desired by Jobs Seekers & Employers

Regarding specific types of educational training and support activities needed in the region, the results were mixed. From the business side, employers in the phase 1 survey were highly satisfied with professional development opportunities available for staff (26%), with 31% of respondents indicating that they spent around $250 per employee on professional development activities each year.

Conversely, job seekers felt that more professional development opportunities, particularly regarding soft and core skills training and employment counselling, would increase their level of employability. Mentorship and more training on the job were critical aspects to increasing their likelihood of employment, as noted across both surveys. Businesses also mentioned in the second phase survey that they expect the most in-demand occupations across the next 12 months to be in skilled trades (28%), the sales/service sector (26%), and the clerical and administrative sector (17%). Ensuring local training services are aligned to these upcoming demand occupations should be a core priority for the region moving forward. However, businesses indicated they were highly satisfied with existing government and non-profit/community support activities, with 83% reported being either 'very satisfied' or 'somewhat satisfied' for this question.

Increased need for marketing efforts of the region

In phase 2 of the employers' survey, one of the factors that had moved up in priority compared to phase 1 was the 'marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace.' Tourism and individuals' ability to relocate can be an essential factor to address some of the challenges that employers have mentioned frequently (such as a lack of qualified candidates in the region). The job seeker survey found, there was a significant decrease in the percentage of respondents who were currently employed. Hence, as the economy recovers from COVID-19, it can be expected that a larger group of job seekers will be looking for new employment opportunities and potentially re-evaluating the region where they live and work. Therefore, the post-COVID economy will require attention to talent retention, along with talent attraction.

Impacts of the COVID-19 pandemic

The timing of the second phase business and job seeker survey was intended to capture local perceptions on the impact of the COVID-19 pandemic from both a supply and demand perspective. Based on businesses' feedback from the second phase survey, respondents were clear that the pandemic had impacted local business productivity significantly, with 71% of businesses indicating that business activity had 'decreased significantly' or 'slightly' during the crisis. However, employer respondents acknowledged a focus on staff retention activities compared to terminations, with 36% of respondents only temporarily laying-off their workforce, whereas 17% of respondents indicated they terminated staff contracts. However, approximately 35% of respondents stated that they had re-hired previously laid off staff. Overall, this trend towards employee retention can be attributed mainly to the Federal Government employee retention program, which included the Canadian Emergency Response Benefit (CERB). The region should closely monitor employee retention and rates of layoffs versus termination as the wage subsidy funding begins to be removed.

Conversely, from the job seeker perspective, COVID-19 is impacting individuals' career choices and levels of confidence in gaining employment. For example, 79% of respondents mentioned they were 'very likely' or 'likely' going to consider employment in occupations that they may not have considered in the past. Equally, students, particularly recent graduates, have been some of the hardest hit during the pandemic as local firms enact strict new hire freezes. Many are turning towards workforce training and education support services to assist them in finding employment or re-enrolling in further education programs such as a masters program to wait out the worst effects of the crisis. This is a common strategy in times of economic downturn. What is different this time, is the shift in program delivery to either online learning or a blended approach, much of which is still be determined within the post-secondary sector.

3.2 Education Roundtable Key Findings

An Education roundtable session was held via Zoom on June 3rd, 2020, to gather the perspectives of education and training sector representatives on the labour market situation in the region. This included:

- Engaging in an in-depth conversation that allowed for exploration of findings from the phase 1 business survey and gathering insight into the "what is happening."
- Understanding the challenges facing Educators locally
- Exploring approaches being utilized to respond to challenges
- Testing the labour market profile with "on the ground" experience.

3.2.1 Emerging Key Themes

- **Better Labour Market Information & Intelligence:** Throughout discussions, the need for better labour market information was identified.
- **COVID-19**: The pandemic is creating a great deal of uncertainty, creating high unemployment, and shifting the skills required by employers
- **Improving Accessibility:** Both online training and micro-credentialing is a crucial focus of several institutions
- **Employer Investment:** Encouraging employers to invest in training is a goal for many institutions
- **Experiential Learning:** There is broad consensus that youth need to have more opportunities for experiential learning, including tours, co-ops, and internships
  - Participants agreed that new graduates are having difficulty articulating soft skills and experience when they apply for their first job, making it more difficult for them to find employment
- According to educators, the top challenges facing employers are:
  - Soft Skills, disconnect between employers and job seekers, COVID Uncertainty and Difficulty clarifying soft skills and experience
- The top challenges the education sector is facing are:
  - Funding, New program competencies in skills areas, Employers not funding professional development
- There is a consensus that due to lack of funding and the need to be more active, education institutions will need to work together with industry to:
  - Develop and access LMI including alumni tracking
  - Provide more up to date, flexible and online programming
  - Connect students to jobs through increased awareness of opportunities
  - Improve Experiential Learning

- There is a consensus that a wide variety of excellent programs are available but not always easy to access or that lack awareness, highlighting the need for improved LMI and coordination.

3.3 Industry Roundtables Key Findings

Three Industry roundtable sessions were held via Zoom on May 28th, June 10th, and June 18th, 2020. The focus of these roundtables was to:

- Engage in a more in-depth conversation that allows for exploration of findings from the business survey, gathering insight into the "what is happening."
- Understand the challenges facing employers locally
- Explore approaches employers are utilizing to respond to challenges
- Test the labour market profile with their "on the ground" experience

3.3.1 Emerging Key Themes

Top Workforce Challenges Employers are Facing

- Soft Skills
- Wages (High Expectations)
- Attracting Workforce to the Region
- Continuous learning access and support
- Recruitment
- Transition Training

Talent Recruitment

- Attracting the workforce to the region is difficult, influenced by a lack of awareness of the area and what it has to offer in lifestyle and work opportunities
- Most employers source all their employees from the local region with a few agricultural firms using the temporary foreign worker program
- The ratio of new grads to retirees concerns several businesses, mainly in the trucking industry
- Employers want to make the process of connecting with students more manageable and less labour intensive
- Employers suggested making co-ops mandatory
- Fort McLeod businesses reported success in attracting and retaining workers from the Philippines, helping to develop a local community that supports newcomers

Access to Training

- Access to training remotely in a cost and time-effective manner is a concern
- Micro credentialing, including a system of recognition of soft skills, is an area of interest for employers

- There is a lack of awareness of all the programming and supports that exist in the region
- There is a clear desire to collaborate more closely with Secondary and Post Secondary institutions to improve student awareness of local opportunities, career pathways and experiential learning
- Employers would like to see KPI's relating to post-secondary outcomes, placements, and retention in the region
- Employers are also interested in collaborating on training to make it more accessible locally and at a lower cost, particularly in LEAN Manufacturing

Workforce Occupation Gaps

- Sheet metal mechanics
- Engineers
- Technologists
- Production Staff (Technology Ready)
- Management
- LEAN Trained
- Mechanical Millwrights
- Qualified truckers

Skills Gaps Employers identified

- Leadership
- Communication
- Continuous Learning mindset
- Divers Licenses
- Soft Skills
- Digital Literacy (HTML)

3.4 Immigration Roundtables Key Findings

Two Immigration roundtable sessions were held via Zoom. The first was held on May 12th and engaged with service providers and select employers, while the second was held on May 26th and engaged new immigrants to Southwest Alberta. These sessions were designed to gather the perspectives of immigrants and immigrant service providers on local challenges related to immigrant integration into the community and the workplace, skills needs in the labour market and to identify opportunities to strengthen labour market alignment and talent development.

3.4.1 Emerging Key Themes

Service Provider Session

- The service providers agree there are significant barriers to attracting and retaining immigrants in the Southwest Alberta Region
- There are a wide variety of services available to support both businesses and immigrants, but there have been disconnects in both awareness and access
- There is a desire to collaborate and engage with additional partners to improve services and access

Immigrant Session

- Newcomers are facing barriers in getting jobs and integrating into Southwest Alberta, including:
  - English as a Second Language (ESL)
  - Getting their first job and in Canada
  - Getting recognized Canadian experience or references
  - Recognition of skills as compared to credentials
- Supports requested include:
  - Improved access to existing services
  - Transition programming
  - Career bridging
  - Job shadowing and
  - Resume writing
- Participants would like to encourage employers to be more open to hiring immigrants and have more inclusive corporate cultures
- There is a desire to see improved collaboration and continued promotion to increase the accessibility of information and services to the immigrant community

3.5 Key Informant Interviews Key Findings

A total of 35 key informant interviews were completed with select stakeholders in the region; these included educational representatives, businesses, immigration service providers, local government, and workforce service providers. These interviews were designed to identify skills gaps in the region and better understand how to address workforce challenges.

3.5.1 Emerging Key Themes

Availability of Talent

- Interviewee opinions were diverse when asked about the general availability and quality of talent
- A significant number of interviewees mentioned large numbers of unskilled or lower-skilled workers are currently looking for work in the region and seem to be applying for jobs indiscriminately, creating challenges for the hiring staff of local businesses
- Some firms that require more specialized skillsets identified challenges in finding skilled and experienced professional-level staff in niche industries. Many of these individuals recognized the skill sets they are seeking, are rare in the region, and there is a limited concentration of firms doing similar work. This reduces potential future employment and may impede candidates from relocating to the area. These businesses often cited the importance of internships and co-op training, where they have the opportunity to develop the skills they cannot find in the market.
- One employer is interviewing international candidates from Toronto because graduates from nearby universities were "OK, not great."
- Local entry-level positions do not pay well enough to attract workers from outside the area. Urban centres attract skilled workers willing to drive the distance, creating a brain drain.
- There is lots of work available for people willing to work in 'terrible conditions,' no experience required.

New Generation of Workers

- There are not as many entry-level positions with a broad range of learning opportunities, so young workers or those in transition cannot get foundational work experience skills.
- Stakeholders identified several challenges employers are having with younger workers, leading to higher turnover and training costs.
- Young people want flexible hours, more input and decision-making ability in their work than the previous generations
- Some firms felt young people do not understand the growth opportunities that flow from a minimum wage, entry-level position
- It was noted that career exploration events at school would help young people make more informed career decisions, and HR consultants could help firms better understand the needs of their younger workers
- Employers acknowledged a general lessening of work ethic among job seekers

Wage Competition

Challenges around employers' ability to pay competitive wages were also expressed. Southern Alberta still pays less than other parts of Alberta, which can be difficult for employers when negotiating wages with a talented candidate.

Temporary Foreign Workers (TFW) and Mennonite Workforce

- Low German Mennonites and foreign workers were identified as a source of manual labour, but employers need to be educated on cultural differences. Otherwise, it is difficult to attract workers to the area.
- Some concerns were expressed about a lack of literacy. High school completion rates are low regionally. Many Low German Mennonites live in the area and are not literate in English.
- Employers described the job market as tight, with a lack of qualified individuals.
- Concerns that local training institutions do not offer required programming.

3.5.2 Key Informant Perspective on Job Seeker Challenges

Quality of Employment Opportunities

The key informants interviewed had diverse opinions on the general quality of employment opportunities.

- Many stakeholders referenced the importance of a good match between the employment opportunity and the job seekers' skills and interests.
- For example, new projects are appearing in agriculture that require technical skills for higher-paid roles. However, many mid-level and senior-level professionals' roles, such as human resources management, are not in Lethbridge and are in larger cities such as Calgary.
- Others mentioned a lack of full-time opportunities with individuals working two or three part-time jobs to make ends meet, which empties the pool of qualified candidates.
- Many students and job seekers from other parts of Canada like the area and want to stay, but the length of contracts and hours available is a limiting factor. Eventually, they need to move to a community where employers provide a much more stable income.

Cultural and Wage Mismatch for Youth in Southwest Alberta

- Stakeholders mentioned that youth want to live and work in dynamic and amenity-rich communities to support their personal and professional goals.
- Many feel there is better long-term earning potential in larger cities, and opportunities are limited in Lethbridge, which has a perception of an older rural city.
- It was suggested that organizations need to work with youth to encourage entrepreneurial thinking and help them understand the opportunities that they can create for themselves in these smaller communities.

Gap Between Job Seeker Skills and Employer Expectations

- Stakeholders mentioned that job seekers might find it challenging to find the job they want because they need more experience before obtaining the higher-level role and increased compensation that many young job seekers seek.
- The importance and expectation for job candidates to have soft skills, which are not always prevalent among job seekers, was emphasized.
- Communication skills are particularly crucial for a job seeker so they can communicate their previous experiences and vision for the future both verbally and orally to stand-out from the pool of candidates with the same formal education.
- Key informants felt job seekers are finding it hard to find a job that fits their wage expectancy. It was mentioned that Southwest Alberta's pace of business is slower than larger cities, and job seekers need to slow down the pace at which they want to advance their careers to match the pace of the city. This expectation may be correlated to high wages for relatively low-skilled roles seen in the oil fields relative to the lower wages that require more skills in Lethbridge.
- Key informants also felt jobseekers are challenged to pursue the right education stream for full-time jobs, without going into debt with tuition. Education is costly, and many jobs require specific degrees or certificates that demand individual prerequisites. Jobseekers are concerned the jobs will be gone by the time they complete their training.

Communities are not as welcoming to newcomers

A better job needs to be done on acknowledging cultural differences for newcomers and recognizing education credentials and experience. Accreditation programs tend to be time-consuming and do not help or appear to benefit those already in the trade.

3.5.3 Key Informant Perspectives on Education and Training: Challenges and Opportunities

Challenge - Align Education and Training with Needs of Local Employers

The stakeholders interviewed had diverse opinions in terms of education and local training gaps, depending on their sector.

- The region's many agriculture programs are not offered elsewhere and secure connections to the agriculture community. This alignment between local education/training and the needs of local employers brings young people to the region. Other sectors require local education and training institutions better to align their offerings with the needs of local employers.
- Tech sector course content needs to stay up to date with trends in the sector.
- It was noted that educational institutions could do a better job of promoting and creating awareness of the trades as a viable career option to attract higher-quality applicants to these roles.

Opportunity – Collaboration Between Businesses and Education/Training Institutions

Collaboration between businesses and education/training institutions has increased over time.

- There is more cooperation between high schools and post-secondary to encourage students to consider a variety of different careers.
- Employers mentioned they have continuous opportunities to present to students.
- Local business incubators also act as a link between educational institutions and businesses.
- Co-ops and internships were consistently mentioned as a great way to connect job seekers and employers.

Challenge – Collaboration between industry and education

- Among employers, opinions ranged from wishing educational institutions took business needs more seriously to outright dismissal of the education system – saying business should take care of their training and avoid the educational system.
- Those who work in education and training, believe there are more opportunities for collaboration among various players, specifically businesses and trade associations.
- Post-secondary education institutions could enhance their relationships with local employers by listening to their concerns and addressing them. Lethbridge College's agricultural programs were highlighted as an example for other industries and institutions to consider.
- Some stakeholders reported that post-secondary institutions do not spend enough time promoting their programs at the high school level.
- Business owners also felt students could be introduced to work experiences at a much younger age to develop better expectations for the opportunities in the working world and understanding of the importance of skills and experience to be successful in their careers.

Challenge – Understanding and addressing attitudes of jobseekers and employers

Concerns were expressed about the gap between expectations of both employers and jobseekers, acknowledging that business owners will need to shift their thinking.

- Employers who embrace the realities of attitudes among job seekers, in general, are more apt to retain them for more extended periods.

Opportunity – Enhance work experience programs

The Registered Apprenticeship Program was viewed as a positive program that helps build a connection between youth, educational institutions and employers, providing the all-important on-the-job experience for job seekers and determining if they have a passion for the industry sector or not.

There were negative aspects of the Registered Apprenticeship Program (RAP) (e.g. transportation challenges for apprentices, higher insurance costs for employers), but the benefits outweigh the burden. A similar work experience program could be developed for new Canadians.

Challenge – Who does what

Interviewees felt there were a variety of solutions and opportunities to assist employers and jobseekers but seemed confused about who was responsible. A general lack of leadership, collaboration, and understanding of the next steps were evident.

3.5.4 Specific Gaps Identified through Interviews

Identified Job Gaps

- Lack of entry-level positions
- Millwrights
- Plumbers
- Electricians
- Truck Drivers

Identified Skills Gaps

- Training on technical systems used in agricultural or construction equipment and trucks. Some farmers do not want expensive equipment damaged by an inexperienced worker.
- Digital literacy skills.
- Soft Skills (Communication, Writing)
- Robotics
- LEAN Manufacturing

4. Appendix A Phase 1 Survey Analysis Report

See Attached

5. Appendix B Phase 2 Survey Analysis Report

See Attached

6. Appendix C Immigration Roundtables Report

See Attached

7. Appendix D Education Roundtable Report

See Attached

8. Appendix E Industry Roundtables Report

See Attached

9. Appendix F Key Stakeholder Interviews Report

See Attached

MDB INSIGHT

Alberta Southwest Regional Skills Study
Skills Gap Analysis

August 2020

SOUTHGROW REGIONAL ECONOMIC DEVELOPMENT

Lethbridge College

Economic Development Lethbridge

Community Futures Alberta Southwest

Vulcan County

Alberta SouthWest Regional Alliance

Taber Economic Development

Funded by:

Canada

Alberta

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This project is funded by the Government of Canada and the Province of Alberta.

Funded by:

Contents

1. Introduction

The Southwest Alberta Regional Skills Gap Study Partnership is a stakeholder collaboration formed to help identify regional skills and competency gaps and explore ways to address them. The partnership is made up of Lethbridge College, Alberta SouthWest, Economic Development Lethbridge, SouthGrow, Community Futures Alberta Southwest, Vulcan County and Town of Taber.

The Regional Skills Gap Study is designed to support greater alignment between job vacancies of local employers with those looking for work. For this study, the Southwest Alberta region is defined as the area spanning east of the BC border, south of Calgary, and west of Brooks.

The goal of this project is a strategy that offers tangible solutions to local and regional challenges related to the labour market, ensuring that resources are being best allocated and that efforts are coordinated for maximum results. The project goals are:

- Understanding the technical and core competency skills gaps in the region, the causes of those gaps and the impact they are having on economic activity
- Identifying methods employers use to address these gaps
- Identifying opportunities for underrepresented groups to fill these gaps with specific training and
- How employers, regional development agencies, post-secondary institutions, and other stakeholders may cooperate to address the challenges.

This report is designed to provide a comprehensive understanding of the specific skills gaps identified through the study area data. Occupation projections were commissioned to identify demand due to economic growth and retirements. Once identified, the top projected occupations were classified by Employment and Social Development Canada (ESDC) as skill level A or B, with A representing those that require university-level education, and B is defined as those requiring College level education. Further analysis informed the relative labour supply from educational institutions in the region.

The data gathered supported the development of occupational profiles that identified specific skills requirements, trends and expected labour supply. The last section of this report includes the development of a shared skills matrix, which highlights the most common transferrable skills between the top occupations in the region. The skills identified in this report have been combined with skills gaps identified through earlier reporting from this initiative, resulting in a broader understanding of the skills needs in the region.

2. Study Area Projected Occupation Requirements 2020 to 2025

The detailed employment by industry projections for the Study Area as a whole and each of the seven constituent sub-areas was transformed into *economic demand* projections for each of the 500 occupations identified in the National Occupation Classification System (NOCS).

Estimates were made, as well, of the number of people likely to retire from each of the 500 occupations within the Study Area looking out to 2020 to 2025. In this model, the *retiree replacement demand* is equal to the expected number of retirees over the five years. It does not reflect potential job elimination or technology impacting the need for replacement workers.

The total number of new hires required for each occupation between 2020 and 2025 is equal to the *economic demand* plus the *retiree replacement demand*. A Microsoft Excel file covering these two demand categories for the Study Area as a whole over the 2020 to 2025 period accompanies this report.

Figure 1 summarizes that table by ranking the 50 occupations representing the highest recruitment demand over the 2020 to 2025 span across the Study Area as a whole. The highlights include the following:

- 4,147 new jobs will be created due to economic expansion
- another 4,227 workers are projected to retire over that period
- thus, the total recruitment challenge is 8,347 against a base of 82,241 employed in 2020
- the total recruitment challenge equals just over 10 percent of all the jobs in 2020
- the top 50 jobs account for two-thirds of the entire recruitment effort faced by the area
- the most significant challenge (426 total recruits) is posed by managers in agriculture (NOCS# 821)
- the second greatest (275) is posed by retail salespersons (6421)
- the third (234) is posed by nurse aides, orderlies, etc. (3413)
- the fourth (232) is posed by registered nurses, etc. (3012)
- the fifth (210) is posed by food counter attendants, etc. (6711)

These top 5 occupations collectively account for 16 percent of the total recruitment in the Study Area. The top 27 occupations account for more than 50 percent of the total demand.

Figure 1: Study Area Projected Detailed Occupation Requirements, TOP 50 - Economic Demand and Retiree Replacement Demand 2020 to 2025

Rank	NOC #	Occupations	Employed 2020	Projected Employed 2025	Economic Demand	Retirees 2020-2025	Total Demand
		Total all 500 occupations	82,241	86,388	4,147	4,227	8,374
1	821	Managers in agriculture	3,396	3,434	38	388	426
2	6421	Retail salespersons	3,262	3,340	78	197	275
3	3413	Nurse aides, orderlies and patient service associates	1,827	1,971	144	90	234
4	3012	Registered nurses and registered psychiatric nurses	1,846	1,996	150	82	232
5	6711	Food counter attendants, kitchen helpers and related support occupations	2,243	2,408	165	45	210
6	621	Retail and wholesale trade managers	2,457	2,515	58	139	197
7	4032	Elementary school and kindergarten teachers	1,452	1,584	132	62	194
8	7511	Transport truck drivers	1,256	1,353	97	93	190
9	6733	Janitors, caretakers and building superintendents	1,125	1,216	91	89	180
10	1221	Administrative officers	1,313	1,392	79	81	160
11	1411	General office support workers	1,272	1,357	85	73	159
12	1241	Administrative assistants	1,211	1,282	71	84	155
13	4413	Elementary and secondary school teacher assistants	1,146	1,251	105	46	151
14	8431	General farm workers	2,223	2,253	30	118	147
15	6731	Light duty cleaners	953	1,034	80	50	131
16	4212	Social and community service workers	1,107	1,191	84	45	129
17	6322	Cooks	1,169	1,255	86	33	119
18	1311	Accounting technicians and bookkeepers	1,076	1,101	25	93	117
19	6232	Real estate agents and salespersons	358	433	75	40	115
20	4031	Secondary school teachers	699	765	66	33	98
21	1414	Receptionists	862	919	57	41	98
22	7512	Bus drivers, subway operators and other transit operators	391	439	48	49	97
23	8612	Landscaping and grounds maintenance labourers	633	699	67	28	95
24	4011	University professors and lecturers	487	532	45	45	90
25	6513	Food and beverage servers	1,077	1,156	80	6	86
26	6611	Cashiers	1,338	1,373	36	46	82
27	1111	Financial auditors and accountants	696	719	23	52	75
28	4214	Early childhood educators and assistants	642	695	53	21	74

Rank	NOC #	Occupations	Employed 2020	Projected Employed 2025	Economic Demand	Retirees 2020-2025	Total Demand
29	631	Restaurant and food service managers	664	715	51	21	72
30	3233	Licensed practical nurses	618	665	46	23	69
31	4021	College and other vocational instructors	426	457	32	35	67
32	6541	Security guards and related security service occupations	355	395	41	24	65
33	6552	Other customer and information services representatives	574	604	30	30	60
34	4412	Home support workers, housekeepers and related occupations	445	476	30	26	57
35	4311	Police officers (except commissioned)	341	394	53	3	57
36	1224	Property administrators	217	247	30	27	56
37	1431	Accounting and related clerks	515	538	22	32	54
38	714	Facility operation and maintenance managers	340	364	23	26	49
39	6622	Store shelf stockers, clerks and order fillers	836	845	10	39	49
40	5254	Program leaders and instructors in recreation, sport and fitness	428	464	36	9	45
41	4012	Post-secondary teaching and research assistants	361	394	32	13	45
42	7452	Material handlers	678	702	24	20	44
43	3414	Other assisting occupations in support of health services	388	417	29	13	42
44	3411	Dental assistants	295	324	29	12	40
45	6311	Food service supervisors	444	477	33	7	40
46	1521	Shippers and receivers	468	481	13	27	40
47	4153	Family, marriage and other related counsellors	279	302	24	15	39
48	4152	Social workers	285	313	27	12	39
49	7321	Automotive service technicians, truck and bus mechanics and mechanical repairers	810	817	7	31	38
50	3112	General practitioners and family physicians	279	304	24	13	38

Source: *metroeconomics*

3. Labour Pool by Skill Level

The only two educational institutions providing skill level A or B training in the region are part of the Lethbridge Service Area, which includes the University of Lethbridge and Lethbridge College.

- During the last five years, the University of Lethbridge has graduated 9,120 individuals, most of them in program bands such as business and languages, social sciences, arts and humanities.
- Lethbridge College has graduated 7,541 individuals since 2015, most of these graduated in areas such as trade and technologies and health science.

Recognizing that these students will go on to pursue a wide array of career paths, some outside of the region, the numbers show a promising trend for the supply of new talent to the area.

If the number of final-year secondary students remains constant for the next five years, this will result in approximately 6,070 new young workers graduating secondary school and beginning post-secondary education/training or entering the workforce. While the number of expected graduates is higher than the anticipated demand for new workers, the region's ability to provide labour will depend on the career paths that these students pursue and the ability to retain that talent. To ensure that there is an adequate number of qualified individuals within each discipline, the region will require a pipeline of young workers that is proportionate to the employment needs and opportunities in the local labour market.

The following table highlights the top projected occupations at skill level C (High School Graduates).

Figure 2: Skill Level C

NOC	2020-2025 Projection Demand	Skill Level	Post-Secondary Program Band	Relevant Graduate Labour Pool (graduates 2014-2019)*
Total (All NOCs)	**8,374**	**N/A**	**N/A**	**N/A**
7511 Transport truck drivers	190	C	N/A (High school graduates)	11,625
6733 Janitors, caretakers and building superintendents	180	C	N/A (High school graduates)	11,625
1411 General office support workers	159	C	N/A (High school graduates)	11,625
8431 General farm workers	147	C	N/A (High school graduates)	11,625
6513 Food and beverage servers	86	C	N/A (High school graduates)	11,625

Source: metroeconomics | LERS Cubes | Alberta Open Data

* The Total number of unique individuals who completed a program at a PSI in the Study Area (University of Lethbridge and Lethbridge College).

3.1 Skill Level A and B Occupation Profiles

To inform the skills requirements more fully in the region, the following section highlights the top 10 projected occupations from skill levels A and B (those requiring University, College Degrees or Certifications). These profiles include:

- Employment and Social Development Canada (ESDC) identified skill level
- National Occupation Code
- Employment Requirements
- Example Titles
- Skills and Knowledge Requirements
- The 6-digit CIP Code Programs being offered in the Study area that teach the skills required to do these jobs at both the College and University level
- The number of students to graduate from these programs in the Study area over the past five years
- The projected number of workers needed to fill these occupations due to retirement and economic growth
- The adjusted supply of graduates based on a 50% retention rate
- Identified relevant trends impacting the future of these occupations.

Skill Level
A

3.1.1 NOC 0821 – Managers in Agriculture

Employment Requirements: Extensive farming experience, obtained as a farm supervisor or specialized crop or livestock worker or by working on a farm, is usually required. A university degree or college diploma in agricultural management or other field related to crop or livestock production may be required.

Example Titles: Apiarist, Apple grower, Chicken farmer, Dairy farmer, Domestic animal breeder, Fruit farmer, Hog breeder, Horse breeder, Maple syrup producer, Market gardener, Potato farmer, Rancher, Seed grower, Sod farmer, Vegetable grower, Vineyard manager, Viticulturist, Wheat farmer.

Skills and Knowledge Requirements: Maintain farm machinery, equipment and buildings; manage overall operation of farm; purchase machinery, livestock, seed, feed and other supplies; organize and co-ordinate planting, cultivating and crop harvesting activities; raising and breeding of livestock and poultry; establish marketing programs; determine the amount and kinds of crops to be grown and livestock to be raised; maintain financial and production records; perform general farm duties; recruit, hire and supervise staff and/or volunteers; processing pig litters; reining; tying; seed cutting; shearing with knife, etc.

6-Digit-CIP Skill Level A (University) Programming:

- 01.0000 - Agriculture, general

Trend Analysis: Agriculture is becoming a high-tech business. Farmers and ranchers are using technology to grow more crops and raise more animals on less land, controls pests and disease, and use data to make faster, better decisions.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
187	N/A	187	93	426

Skill Level A

3.1.2 NOC 3012 - Registered Nurses and Registered Psychiatric Nurses

Employment Requirements: Completion of a university, college or other approved registered nursing program is required. Additional academic training or experience is required to specialize in a specific area of nursing. A master's or doctoral degree in nursing is usually required for clinical nurse specialists, clinical nurses, nursing consultants and nursing researchers. Registration with a regulatory body is required in all provinces and territories. Registered psychiatric nurses Completion of a university or college registered psychiatric nursing program is required.

Example Titles: Emergency care nurse, public health nurse, community health nurse, critical care nurse, clinical nurse, occupational health nurse, private duty nurse, registered nurse (R.N.), registered psychiatric nurse (R.P.N.), nursing consultant, nurse researcher, intensive care nurse.

Skills and Knowledge Requirements: Assess patients to identify appropriate nursing interventions; operate or monitor medical apparatus or equipment; provide supportive counselling and life skills programming; provide nursing care; provide consultative services regarding issues relevant to nursing profession and nursing practice; assist in surgery and other medical procedures; participate in community needs assessment and program development; monitor, assess, address, document and report symptoms and changes in patients' conditions; manage home care cases; engage in research activities related to nursing; collaborate to plan, implement, co-ordinate and evaluate patient care, etc.

6-Digit-CIP Skill Level A (University) Programming:

- 51.3801 - Registered nursing/registered nurse (RN, ASN, BSN, BScN, MSN, MScN)

Trend Analysis: Canada will need over 60,000 nurses by 2022. Not only are they currently in demand but they will be for the next 10 years, according to industry-focused organizations such as the World Economic Forum.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
794	N/A	794	397	232

Skill Level
A

3.1.3 NOC 0621 - Retail and Wholesale Trade Managers

Employment Requirements: Completion of secondary school is required. A university degree or college diploma in business administration or other field related to the product or service being sold may be required. Several years of related retail sales experience at increasing levels of responsibility are usually required.

Example Titles: Antique dealer, assistant manager – retail, automobile repair shop manager, bookstore manager, car dealership manager, cattle dealer, clothing store manager, department store manager, pleasure boat dealer, sporting goods store manager, store manager – retail, supermarket manager, variety store manager.

Skills and Knowledge Requirements: Skills management help – management; recruiting and hiring; allocating and controlling resources; evaluating; supervising; analysis help – analysis; planning; projecting outcomes; analysing; information; communication help – communication; interviewing; negotiating and adjudicating.

6-Digit-CIP Skill Level A (University) Programming:

- 52.0201 - Business administration and mgmt., general
- 52.1001 - Human resources mgmt./personnel administration, general
- 52.1101 - International business/trade/commerce
- 52.1201 – Mgmt. information systems, general
- 52.1401 - Marketing/marketing mgmt., general
- 52.9999 - Business, mgmt., marketing, and related support services, other

Trend Analysis: The sector is undergoing disruption as key e-commerce players such as Amazon shift consumer spending online. Traditional retail stores and mangers are now having to compete with large scale global businesses. Yet, the digitalisation of goods and services also offers potential for mangers to transform the retail experience through the influence of tech (e.g. augmented reality etc.). Problem solving, management, comfortability with tech and ability to think forward will be critical skills long term.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,208	N/A	1,208	604	197

Skill Level A

3.1.4 NOC 4032 - Elementary School and Kindergarten Teachers

Employment Requirements: A bachelor's degree in education is required. A bachelor's degree in child development may be required. Additional training is required to specialize in special education or second language instruction. A provincial teaching certificate is required. Additional certification is required to teach English or French as a second language. Membership in a provincial or territorial teachers' association or federation is usually required.

Example Titles: Special education teacher - primary school, remedial teacher - elementary school, teacher-librarian - elementary school, primary school teacher, supply teacher - elementary school, special education teacher - elementary school, English as a second language elementary school teacher, French as a second language elementary school teacher, French immersion teacher - elementary school, kindergarten teacher.

Skills and Knowledge Requirements: Prepare subject material for presentation according to an approved curriculum; participate in staff meetings, educational conferences and teacher training workshops; identify childrens' individual learning needs; evaluate the progress of students and discuss results with students, parents and school officials; develop course content; teach students using lessons, discussions, audio-visual presentations and field trips; prepare, administer and correct tests; lead students in activities to promote their physical, mental and social development and their school readiness; prepare and implement remedial programs for students requiring extra help; etc.

6-Digit-CIP Skill Level A (University) Programming:

- 13.0101 - Education, general
- 13.1302 - Art teacher education
- 13.1303 - Business teacher education
- 13.1305 - Language arts teacher education
- 13.1311 - Mathematics teacher education
- 13.1312 - Music teacher education
- 13.1314 - Physical education and coaching
- 13.1316 - Science teacher/science education
- 13.1318 - Social studies teacher education
- 13.1324 - Drama and dance teacher education
- 13.1325 - Languages arts teacher education

Trend Analysis: COVID-19 has highlighted the fragility of the education sector and multitude of areas in which it can be disrupted. The next generation of teachers will need to be equipped for working in a blended virtual and in-person teaching environment. Further, the selected blending of technology mediums (e.g. video) into the classroom to better engage students will be required as the world becomes ever more connected and over stimulated.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,014	N/A	1,014	507	194

Skill Level B

3.1.5 NOC 1221/1241 Administrative Officers and Administrative Assistants

Employment Requirements: Completion of secondary school is required. A university degree or college diploma in business or public administration may be required. Experience in a senior clerical or executive secretarial position related to office administration is usually required. Project management certification may be required by some employers.

Example Titles: Access to information and privacy officer, records analyst - access to information, university admissions officer, administrative officer, administrative services co-ordinator, co-ordinator, office services, forms management officer, liaison officer, office manager, planning officer, surplus assets officer, office administrator.

Skills and Knowledge Requirements: Review, evaluate and implement new administrative procedures; establish work priorities and ensure procedures are followed; carry out administrative activities of establishment; administer policies and procedures related to the release of records in processing requests under government access to information and privacy legislation; co-ordinate and plan for office services such as accommodation, relocation, equipment, supplies, forms, disposal of assets; assist in the preparation of operating budget and maintain inventory and budgetary controls; assemble data and prepare periodic and special reports, oversee and co-ordinate office administrative procedures; etc.

6-Digit-CIP Skill Level A (University) Programming:

- 52.0201 - Business administration and management, general
  - 52.9999 - Business, management, marketing, and related support services, other

6-Digit-CIP Skill Level B (College) Programming:

- 52.0201 - Business administration and management, general
- 52.1401 - Marketing/marketing management, general

Trend Analysis: As routine tasks continue to become automated (e.g. file management, data analysis etc.) administration officials will be challenged to perform more high order thinking roles. There is evidence to suggest assistants will have to compete more for full time positions as the workforce transitions closer to a contract-based work model. Additionally, advances in technology such as Artificial Intelligence (AI) and virtual assistants (e.g. Apple's Siri) will continue to improve and transform or replace the job function for admin assistants.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
552	367	919	459	315

Skill Level B

3.1.6 NOC 4212 - Social and Community Service Workers

Employment Requirements: Completion of a college or university program in social work, child and youth care, psychology or other social science or health-related discipline is usually required. Previous work experience in a social service environment as a volunteer or in a support capacity may replace formal education requirements for some occupations in this unit group.

Example Titles: Income maintenance officer, shelter supervisor, rehabilitation worker – community and social services worker, crisis intervention worker, developmental service worker, family service worker, group home worker, mental health worker, Aboriginal outreach worker, veteran services officer, welfare and compensation officer, child and youth worker, life skills instructor.

Skills and Knowledge Requirements: Obtain information and prepare reports or case histories; appraise clients' needs or eligibility for specific services; implement life skills workshops; assess client's relevant skill strengths and development needs; conduct follow-up assessments; develop, co-ordinate and implement the delivery of specific services within the community; provide suicide and crisis intervention; resolve conflict situations; supervise activities of clients living in group homes and half-way houses; supervise children's visits with parents to ensure their safety; assist offenders in pre-release and release planning; implement substance abuse treatment programs; etc.

6-Digit-CIP Skill Level A (University) Programming:

- 45.0101 - Social sciences, general

6-Digit-CIP Skill Level B (College) Programming:

- 44.0000 - Human services, general
- 44.0702 - Youth services/administration

Trend Analysis: The increase in stimulation via technology and social platforms has already created a crisis of mental health that has been further compounded by the impacts of COVID-19. Social and community service workers will be challenged to service this growing need for nuanced mental health support, potentially over virtual platforms, in a way that is both tailored yet accessible to the masses. Workers will also more likely have to deal with low skilled and minority groups who are predicted to be the most severely affected economically by the shift towards automation.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
219	148	367	184	129

Skill Level
B

3.1.7 NOC 6322 - Cooks

Employment Requirements: Completion of secondary school is usually required. Completion of a three-year apprenticeship program for cooks or completion of college or other programs in cooking or several years of commercial cooking experience are required. Trade certification is available, but voluntary, in all provinces and territories. Red Seal endorsement is also available to qualified cooks upon successful completion of the interprovincial Red Seal examination.

Example Titles: Apprentice cook, journeyman/woman cook, licensed cook, cook, institutional cook, hospital cook, short order cook, dietary cook, grill cook, first cook, second cook, line cook.

Skills and Knowledge Requirements: Prepare and cook complete meals or individual dishes and foods; prepare and cook special meals for patients as instructed by dietitian or chef; plan menus, determine size of food portions, estimate food requirements and costs, and monitor and order supplies; inspect kitchens and food service areas; train staff in preparation, cooking and handling of food; order supplies and equipment; supervise kitchen staff and helpers; maintain inventory and records of food, supplies and equipment; clean kitchen and work areas; recruit and hire staff; organize and manage buffets and banquets; manage kitchen operations.

6-Digit-CIP Skill Level A (University) Programming:

- N/A

6-Digit-CIP Skill Level B (College) Programming:

- 12.0500 - Cooking and related culinary arts, general
- 2.0503 - Culinary arts/chef training

Trend Analysis: Population and income growth are expected to result in greater consumer demand for food at a variety of dining places. People will continue to eat out, buy takeout meals, or have food delivered. In response to increased consumer demand, more restaurants, cafeterias, and catering services will open and serve more meals. These establishments will require more cooks to prepare meals for customers.

There is also likely to be a shift away from traditional fast food chains, towards healthier, more green options. Specifically, whole food, plant-based diets are gaining traction as consumers realise the associated health benefits.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
N/A	172	172	86	119

Skill Level B

3.1.8 NOC 1311 - Accounting Technicians and Bookkeepers

Employment Requirements: Completion of secondary school is required. Completion of a college program in accounting, bookkeeping or a related field or completion of two years (first level) of a recognized professional accounting program (e.g., Chartered Accounting, Certified General Accounting) or courses in accounting or bookkeeping combined with several years of experience as a financial or accounting clerk are required.

Example Titles: Accounting technician, bookkeeper, accounting bookkeeper.

Skills and Knowledge Requirements: Calculate and prepare cheques for payroll; reconcile accounts; post journal entries; maintain general ledgers and financial statements; prepare trial balance of books; calculate fixed assets and depreciation; prepare other statistical, financial and accounting reports; prepare tax returns; keep financial records and establish, maintain and balance various accounts using manual and computerized bookkeeping systems.

6-Digit-CIP Skill Level A (University) Programming:

- 52.0301 - Accounting 52.0801 - Finance, general
-

6-Digit-CIP Skill Level B (College) Programming:

- 52.0301 - Accounting

Trend Analysis: The future of accountancy is promising with a projected 10% increase in accountant and auditor employment between 2016 and 2026, according to the U.S. Bureau of Labor Statistics (BLS). Technology advancements such as minibots, machine learning, and adaptive intelligence are increasingly being added to finance and accounting teams toolkit.

As technology progress and becomes more complex there will be a shift towards further education and upskilling programs to cater for this skill gap.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,053	288	1,341	671	117

Skill Level A

3.1.9 NOC 4031 - Secondary School Teachers

Employment Requirements: Teachers of academic subjects require a bachelor's degree in education which is often preceded by a bachelor's degree in the arts or sciences. Teachers of vocational or technical subjects require a bachelor's degree in education which is usually preceded by specialized training or experience in the subject. Department heads usually require several years of teaching experience. To specialize in special education or English or French as a second language, additional training is required. A provincial teaching certificate is required.

Example Titles: Librarian, remedial teacher, trades instructor, commerce teacher, adult education teacher, biology teacher, department head, ESL teacher, English teacher, French as a second language teacher, secondary school teacher, special education supply teacher, history teacher, vocational teacher.

Skills and Knowledge Requirements: Assign and correct homework; prepare and deliver presentations at conferences, workshops and symposia; prepare subject material for presentation according to an approved curriculum; teach students through lectures, discussions, audio-visual presentations and laboratory, shop and field studies; evaluate the progress of students and discuss results with students, parents and school officials; develop course content; provide tutoring assistance; participate in staff meetings, educational; conferences and teacher training workshops; prepare, administer and correct tests.

6-Digit-CIP Skill Level A (University) Programming:

- 13.0101 - Education, general; 13.1302 - Art teacher education; 13.1303 - Business teacher education; 13.1305 - English/English language arts teacher education; 13.1311 - Mathematics teacher education; 13.1312 - Music teacher education; 13.1314 - Physical education teaching and coaching; 13.1316 - Science teacher education/general science teacher education
- 13.1318 - Social studies teacher education; 13.1324 - Drama and dance teacher education; 13.1325 - French language/French language arts teacher education; 13.1326 - German language teacher education; 13.1399 - Teacher education and professional development

Trend Analysis: As mentioned in section 4.1.4, secondary school teachers are being forced to integrate virtual learning into the traditional physical teaching model. At the high school level curriculum reform is also likely to occur, with a shift towards more problem based, team learning as opposed to the traditional lecture and route learning model of the 20th century.

Like social workers, high school teacher's role will also become part mental health worker and advocate as they have some of the highest interaction within society with youths.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,014	N/A	1,014	507	98

Skill Level
A

3.1.10 NOC 4011 - University Professors and Lecturers

Employment Requirements: A doctoral degree in the field of specialization is required for university professors. A master's degree in the field of specialization is required for university lecturers. Licences or professional certification may be required for professors teaching future practitioners in certain professionally regulated fields, such as medicine, engineering, architecture, psychology, or law.

Example Titles: Department chairperson; assistant professor; associate professor; department head; chairperson, computer science professor; professor of medicine; French language professor; English professor; university professor; lecturer; engineering instructor.

Skills and Knowledge Requirements: Teach one or more university subjects to undergraduate and graduate students; prepare and deliver lectures to students and conduct laboratory sessions or discussion groups; prepare, administer and grade examinations, laboratory assignments and reports; advise students on course and academic matters and career decisions; direct research programs of graduate students and advise on research matters; conduct research in field of specialization and publish findings in scholarly journals or books; may serve on faculty committees, and perform a variety of administrative duties; etc.

6-Digit-CIP Skill Level A (University) Programming:

- 13.0101 - Education, general; 13.1302 - Art teacher education; 13.1303 - Business teacher education; 13.1305 - English/English language arts teacher education; 13.1311 - Mathematics teacher education; 13.1312 - Music teacher education; 13.1314 - Physical education teaching and coaching; 13.1316 - Science teacher education/general science teacher education
- 13.1318 - Social studies teacher education; 13.1324 - Drama and dance teacher education; 13.1325 - French language/French language arts teacher education; 13.1326 - German language teacher education; 13.1399 - Teacher education and professional development

Trend Analysis: As with elementary and high school teachers, the tertiary level education system is set to be disrupted by technology change. COVID-19 impacts on international student numbers and the practicalities of conducting in person classes means that universities are having to quickly adapt to stay relevant and cash flow positive.

Looking forward there will be greater demand for industry experts to deliver online, virtual classes accessible worldwide and increased personalisation across an individual's learning journey. This will be challenging for existing professors who have traditionally been reluctant to change.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,014	N/A	1,014	507	90

4. Common Skills Matrix

The figure below presents the overlap of common key skills and knowledge requirements across the occupations identified as highest in demand the A and B skill levels, as presented in Section 3.

Figure 3: Common Skills between Top Projected Occupations Requiring University/College, 2020-2025

Top NOCs	Use Technology	Management of Staff	Purchasing	Report Writing	Marketing	Training/ Teaching	Recruiting /Hiring	Communications	Maintain Equipment	Maintain Financial Records
821 Managers in agriculture	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3012 Registered nurses and registered psychiatric nurses	Yes	Yes	N/A	Yes	N/A	N/A	N/A	Yes	N/A	N/A
621 Retail and wholesale trade managers	Yes	Yes	Yes	Yes	N/A	Yes	Yes	Yes	N/A	N/A
4032 Elementary school and kindergarten teachers	Yes	N/A	N/A	Yes	N/A	Yes	N/A	Yes	N/A	N/A
1221 Administrative officers, 1241 Administrative assistants	Yes	N/A	Yes	Yes	N/A	N/A	N/A	Yes	N/A	Yes
4212 Social and community service workers	Yes	N/A	N/A	Yes	N/A	N/A	N/A	Yes	N/A	N/A
6322 Cooks	Yes	Yes	Yes	N/A	N/A	Yes	Yes	Yes	Yes	N/A
1311 Accounting Technicians and Bookkeepers	Yes	N/A	N/A	Yes	N/A	N/A	N/A	Yes	N/A	Yes
4031 Secondary School Teachers	Yes	N/A	N/A	Yes	N/A	Yes	N/A	Yes	N/A	N/A
4011 University professors and lecturers	Yes	N/A	N/A	Yes	N/A	Yes	N/A	Yes	N/A	N/A

MDB INSIGHT

SOUTHWEST ALBERTA REGIONAL SKILLS STUDY

KEY STAKEHOLDER INTERVIEWS REPORT

Contents

Key Informant Interview Key Findings

A total of 35 key informant interviews were completed with select stakeholders in the region; these included educational representatives, businesses, immigration service providers, local government, and workforce service providers. These interviews were designed to identify skills gaps in the region and better understand how to address workforce challenges.

1.1.1 Emerging Key Themes

Availability of Talent

- Interviewee opinions were diverse when asked about the general availability and quality of talent
- A significant number of interviewees mentioned large numbers of unskilled or lower-skilled workers are currently looking for work in the region and seem to be applying for jobs indiscriminately, creating challenges for the hiring staff of local businesses
- Some firms that require more specialized skillsets identified challenges in finding skilled and experienced professional-level staff in niche industries. Many of these individuals recognized the skill sets they are seeking, are rare in the region, and there is a limited concentration of firms doing similar work. This reduces potential future employment and may impede candidates from relocating to the area. These businesses often cited the importance of internships and co-op training, where they have the opportunity to develop the skills they cannot find in the market.
- One employer is interviewing international candidates from Toronto because graduates from nearby universities were "OK, not great."
- Local entry-level positions do not pay well enough to attract workers from outside the area. Urban centres attract skilled workers willing to drive the distance, creating a brain drain.
- There is lots of work available for people willing to work in 'terrible conditions,' no experience required.

New Generation of Workers

- There are not as many entry-level positions with a broad range of learning opportunities, so young workers or those in transition cannot get foundational work experience skills.
- Stakeholders identified several challenges employers are having with younger workers, leading to higher turnover and training costs.
- Young people want flexible hours, more input and decision-making ability in their work than the previous generations
- Some firms felt young people do not understand the growth opportunities that flow from a minimum wage, entry-level position
- It was noted that career exploration events at school would help young people make more informed career decisions, and HR consultants could help firms better understand the needs of their younger workers
- Employers acknowledged a general lessening of work ethic among job seekers

Wage Competition

Challenges around employers' ability to pay competitive wages were also expressed. Southern Alberta still pays less than other parts of Alberta, which can be difficult for employers when negotiating wages with a talented candidate.

Temporary Foreign Workers (TFW) and Mennonite Workforce

- Low German Mennonites and foreign workers were identified as a source of manual labour, but employers need to be educated on cultural differences. Otherwise, it is difficult to attract workers to the area.
- Some concerns were expressed about a lack of literacy. High school completion rates are low regionally. Many Low German Mennonites live in the area and are not literate in English.
- Employers described the job market as tight, with a lack of qualified individuals.
- Concerns that local training institutions do not offer required programming.

1.1.2 Key Informant Perspective on Job Seeker Challenges

Quality of Employment Opportunities

The key informants interviewed had diverse opinions on the general quality of employment opportunities.

- Many stakeholders referenced the importance of a good match between the employment opportunity and the job seekers' skills and interests.
- For example, new projects are appearing in agriculture that require technical skills for higher-paid roles. However, many mid-level and senior-level professionals' roles, such as human resources management, are not in Lethbridge and are in larger cities such as Calgary.
- Others mentioned a lack of full-time opportunities with individuals working two or three part-time jobs to make ends meet, which empties the pool of qualified candidates.
- Many students and job seekers from other parts of Canada like the area and want to stay, but the length of contracts and hours available is a limiting factor. Eventually, they need to move to a community where employers provide a much more stable income.

Cultural and Wage Mismatch for Youth in Southwest Alberta

- Stakeholders mentioned that youth want to live and work in dynamic and amenity-rich communities to support their personal and professional goals.
- Many feel there is better long-term earning potential in larger cities, and opportunities are limited in Lethbridge, which has a perception of an older rural city.
- It was suggested that organizations need to work with youth to encourage entrepreneurial thinking and help them understand the opportunities that they can create for themselves in these smaller communities.

Gap Between Job Seeker Skills and Employer Expectations

- Stakeholders mentioned that job seekers might find it challenging to find the job they want because they need more experience before obtaining the higher-level role and increased compensation that many young job seekers seek.
- The importance and expectation for job candidates to have soft skills, which are not always prevalent among job seekers, was emphasized.
- Communication skills are particularly crucial for a job seeker so they can communicate their previous experiences and vision for the future both verbally and orally to stand-out from the pool of candidates with the same formal education.
- Key informants felt job seekers are finding it hard to find a job that fits their wage expectancy. It was mentioned that Southwest Alberta's pace of business is slower than larger cities, and job seekers need to slow down the pace at which they want to advance their careers to match the pace of the city. This expectation may be correlated to high wages for relatively low-skilled roles seen in the oil fields relative to the lower wages that require more skills in Lethbridge.
- Key informants also felt jobseekers are challenged to pursue the right education stream for full-time jobs, without going into debt with tuition. Education is costly, and many jobs require specific degrees or certificates that demand individual prerequisites. Jobseekers are concerned the jobs will be gone by the time they complete their training.

Communities are not as welcoming to newcomers

A better job needs to be done on acknowledging cultural differences for newcomers and recognizing education credentials and experience. Accreditation programs tend to be time-consuming and do not help or appear to benefit those already in the trade.

1.1.3 Key Informant Perspectives on Education and Training: Challenges and Opportunities

Challenge - Align Education and Training with Needs of Local Employers

The stakeholders interviewed had diverse opinions in terms of education and local training gaps, depending on their sector.

- The region's many agriculture programs are not offered elsewhere and secure connections to the agriculture community. This alignment between local education/training and the needs of local employers brings young people to the region. Other sectors require local education and training institutions better to align their offerings with the needs of local employers.
- Tech sector course content needs to stay up to date with trends in the sector.
- It was noted that educational institutions could do a better job of promoting and creating awareness of the trades as a viable career option to attract higher-quality applicants to these roles.

Opportunity – Collaboration Between Businesses and Education/Training Institutions

Collaboration between businesses and education/training institutions has increased over time.

- There is more cooperation between high schools and post-secondary to encourage students to consider a variety of different careers.
- Employers mentioned they have continuous opportunities to present to students.
- Local business incubators also act as a link between educational institutions and businesses.
- Co-ops and internships were consistently mentioned as a great way to connect job seekers and employers.

Challenge – Collaboration between industry and education

- Among employers, opinions ranged from wishing educational institutions took business needs more seriously to outright dismissal of the education system – saying business should take care of their training and avoid the educational system.
- Those who work in education and training, believe there are more opportunities for collaboration among various players, specifically businesses and trade associations.
- Post-secondary education institutions could enhance their relationships with local employers by listening to their concerns and addressing them. Lethbridge College's agricultural programs were highlighted as an example for other industries and institutions to consider.
- Some stakeholders reported that post-secondary institutions do not spend enough time promoting their programs at the high school level.
- Business owners also felt students could be introduced to work experiences at a much younger age to develop better expectations for the opportunities in the working world and understanding of the importance of skills and experience to be successful in their careers.

Challenge – Understanding and addressing attitudes of jobseekers and employers

Concerns were expressed about the gap between expectations of both employers and jobseekers, acknowledging that business owners will need to shift their thinking.

- Employers who embrace the realities of attitudes among job seekers, in general, are more apt to retain them for more extended periods.

Opportunity – Enhance work experience programs

The Registered Apprenticeship Program was viewed as a positive program that helps build a connection between youth, educational institutions and employers, providing the all-important on-the-job experience for job seekers and determining if they have a passion for the industry sector or not.

There were negative aspects of the Registered Apprenticeship Program (RAP) (e.g. transportation challenges for apprentices, higher insurance costs for employers), but the benefits outweigh the burden. A similar work experience program could be developed for new Canadians.

Challenge – Who does what

Interviewees felt there were a variety of solutions and opportunities to assist employers and jobseekers but seemed confused about who was responsible. A general lack of leadership, collaboration, and understanding of the next steps were evident.

1.1.4 Specific Gaps Identified through Interviews

Identified Job Gaps

- Lack of entry-level positions
- Millwrights
- Plumbers
- Electricians
- Truck Drivers

Identified Skills Gaps

- Training on technical systems used in agricultural or construction equipment and trucks. Some farmers do not want expensive equipment damaged by an inexperienced worker.
- Digital literacy skills.
- Soft Skills (Communication, Writing)
- Robotics
- LEAN Manufacturing

Southwest Alberta Regional Skills Study Interview Summary – Lethbridge

Employers Point of View on the Local Regional Skills Gap

Availability of Talent

The stakeholders interviewed had a wide diversity of opinions on the general availability and quality of talent. A significant number of interviewees mentioned large numbers of unskilled or lower-skilled workers are currently looking for work in the Region and seem to be applying for jobs indiscriminately, creating challenges for the hiring staff of local businesses. Some firms that require more specialized skillsets identified challenges in finding skilled and experienced professional-level staff in niche industries. Many of these individuals recognized the skill sets they are looking for are rarer in the Region, and there are not concentrations of firms doing similar work, creating fewer opportunities. These businesses often cited the importance of internships and co-op training, where they have the opportunity to develop the skills they cannot find in the market.

New Generation of Workers

Some stakeholders also mentioned challenges related to a gap in understanding between employers and the new generation of workers, which leads to a concern around employee turnover and rising hiring and training costs. For example, millennials are wanting more flexible hours and more input and decision-making ability in their work than the previous generation. Some firms also felt young people don't understand the growth the comes with a minimum wage role or a position where one works with their hands. It was noted that career exploration events at school would help young people make more informed career decisions, and HR consultants could help firms better understand the needs of their younger workers.

Wage Competition

Challenges around employers' ability to pay competitive wages were also expressed. Historically the city felt the impact of the wage war with the oil fields. However, even as this the economy shifts some stakeholders mentioned, Southern Alberta still pays less than other parts of Alberta, which can be difficult for employers when negotiating wages with a talented candidate. On the other hand, one stakeholder feels local economic development does an excellent job of attracting business and employees and universities have contributed to growing technical talent within the community.

Job Seekers Point of View on the Local Regional Skills Gap

Quality of Employment Opportunities

The stakeholders interviewed had diverse opinions on the general quality of employment opportunities. Many stakeholders referenced the importance of a good match between the employment opportunity and the job seekers' skills and interests. For example, new projects are appearing in agriculture that require technical skills for higher-paid roles. On the other hand, many mid-level and senior-level professionals' roles, such as human resources management, are not in Lethbridge and are in larger cities such as Calgary.

Cultural Mismatch Between Youth's Desires and The Image of Lethbridge

Stakeholders mentioned that youth want to live and work in dynamic and amenity-rich communities to support their personal and professional goals. Many youths feel there are more opportunities with long-term earning potential in larger cities, and opportunities are limited in Lethbridge, which has a perception of an older rural city. This was mentioned alongside statements that there are fewer headquarters in Lethbridge relative to larger cities. It was suggested that organizations need to work with youth to encourage entrepreneurial thinking and help them understand the opportunities that they can create for themselves in this smaller community. Lethbridge could also improve its image by promoting rural opportunities, modernizing infrastructure, and strengthening relationships between stakeholders.

Gap Between Job Seeker Skills and Employer Expectations

Stakeholders mentioned that job seekers might find it challenging to find the job they want because they need more experience before obtaining the higher-level role and increased compensation that many young job-seekers desire. Many individuals also stressed the importance and expectation for job candidates to have soft skills, which are not always prevalent among job seekers. Communication skills are particularly crucial for a job seeker so they can communicate their previous experiences and vision for the future both verbally and orally to stand-out from the pool of candidates with the same formal education. Internships and co-ops, as well as committees focused on developing interest and experience in the trades for high school students, are opportunities currently taken advantage of in Lethbridge.

Wage Expectations

Job seekers are finding it hard to find a job that fits their wage expectancy. It was mentioned that Southwest Alberta's pace of business is slower than larger cities, and job seekers need to slow down the pace at which they want to advance their careers to match the pace of the city. This expectation may be correlated to high wages for relatively low-skilled roles seen in the oil fields relative to the lower wages that require more skills in Lethbridge.

Large Influx of Job Applications

A few interviewees mentioned that due to a large number of applicants for most jobs that may or may not be qualified for the role, serious job seekers find it harder to stand out to prospective employers. One employer mentioned they help mitigate this challenge by Inviting candidates to present their resumes personally to their physical workplace. Candidate profiles in Indeed and Monster and from Co-ops and internship programs are also helpful in finding these qualified job seekers.

Education and Training – Challenges and Opportunities

Challenge - Align Education and Training with Needs of Local Employers

The stakeholders interviewed had diverse opinions in terms of education and local training gaps, depending on their sector. Compared to other regions in Southern Alberta, such as Medicine Hat, Lethbridge is an education hub with many agriculture programs not offered elsewhere and secure connections to the agriculture community. This alignment between local education/training and the needs of local employers brings young people to Lethbridge. On the other hand, some sectors require local education and training institutions to better aligning their offerings with the needs of local employers. For example, more focus could be dedicated to expanding training for the trades as millwright plumbers and other trades students currently have to leave the Region for training. Tech sector course content needs to stay up to date with trends in the sector. Gaps were noted in robotics, lean manufacturing, robotics specialization and basic lean training. Stakeholders also expressed the need for educational institutions to teach students' softs skills to support their performance in the working world.

Challenge - Promoting Education in Sectors Requiring More Labour

Stakeholders mentioned that trades had seen fewer candidates interested in pursuing a long-term career, particularly in areas such as electricians and millwrights. It was noted that educational institutions could do a better job of promoting and creating awareness of the trades as a viable career option to attract higher-quality applicants to these roles.

Opportunity – Collaboration Between Businesses and Education/Training Institutions

The stakeholders interviewed mentioned the collaboration between businesses and education/training institutions has increased over time. There is more cooperation between high schools and post-secondary to encourage students to consider a variety of different careers. Employers mentioned they have continuous opportunities to present to students. Local business incubators also act as a link between educational institutions and businesses. Co-ops and internships were consistently mentioned as a great way to connect job seekers and employers. Networking events and job fairs were also mentioned.

Opportunity – Invest in Career Development at a Younger Age

A few stakeholders expressed the importance of youth developing an understanding of the relationship between skills and learning with work opportunities at a younger age. Stakeholders mentioned government funding could be used to incorporate career development starting at Kindergarten. Experiential learning could also be provided at a younger age to develop better expectations for the opportunities in the working world and understanding of the importance of skills and experience to be successful in their career.

Southwest Alberta Regional Skills Study Interview Summary – SouthGrow

Employers Point of View on the Local Regional Skills Gap

Availability of Talent

- The availability of talent is sector-specific.
- Many workers are available for construction. One interviewee said construction is more organized in terms of recruitment, bringing in labour from greater distances if needed, given the sector's temporary nature. Interviewees said construction has kept up with technology.
- Cleaners and health care workers seem to be easy to source. Health care uses a charge-back method to workers have to pay for training if they don't stick with the employer who funded the courses.
- If an employer is looking for specific skills, labour supply can be tighter, as some workers are less willing to venture into the area.
- Local entry-level positions do not pay well enough to attract workers from outside the area. Urban centres attract skilled workers willing to drive the distance, creating a brain drain.

Training levels vary

- Some concerns were expressed about a lack of literacy. High school completion rates are low regionally. Many Low German Mennonites live in the area and are not literate in English.
- There is not as much entry-level work with a broad range of learning opportunities, so young workers or those in transition cannot get foundational work experience skills.
- Workers not learning specialized systems used on agricultural or construction equipment and trucks. Some farmers do not want expensive equipment damaged by an inexperienced worker. There were concerns expressed about a drop in digital literacy skills. Without those skills, one interviewee said, it's like being illiterate.

A disconnect between outside companies and local workers

One interviewee noted a disconnect between companies based in urban centres looking for workers locally, and not receiving the support they need, and not being able to identify local workers with the skill sets. As a result, there has been some local public opposition to the projects. Businesses complain that commuter workers are not spending any money in the community other than lunch. Buy-local marketing campaigns have been attempted, but often shops and businesses are not open when residents want to purchase items.

Differing appetites for 'hard work.'

- There is lots of work available for people willing to work in 'terrible conditions,' no experience required.

- However, younger workers are not interested in manual-labour positions due to the nature of the work or the pay level. Younger workers don't possess the resilient work ethic that older workers do.
- Some workers have become accustomed to high rates of pay and would instead perform a service job that manual labour if the income is similar. Workers are also not willing to put in extra time, arrive early or stay late.
- Low German Mennonites and foreign workers were identified as a source of manual labour, but employers need to be educated on cultural differences. Otherwise, it is difficult to attract workers to the area.

Job Seekers Point of View on the Local Regional Skills Gap

It's not what you know

Getting a job in the area depends on who you know. As a result, experienced newcomers and highly qualified individuals without local connections are working low-skills jobs. Affluent individuals are scooping higher pays even though they are not as skilled because they know someone.

Wages are low

Even in harsh work conditions, wage rates offered are low, resulting in less disposable income, multiple part-time jobs, and mental health issues. Workers are drawn to urban areas that pay better, resulting in a shrinking labour pool.

Communities are not welcoming

A better job needs to be done on acknowledging cultural differences for newcomers. Small towns are not as welcoming as they could be. Slow accreditation programs do not help and appear to benefit those already in the trade. The example of the qualified foreign dentist cleaning horse stalls highlights the perception that newcomers should be diminished and discounted before they are accepted in a community, a situation that needs to change.

Employers need to understand youth perspective

Employers are not creating jobs with growth potential; they are not willing to confront the demands of a younger workforce want flexible work hours and little manual work. Some youth don't want to be saddled with a mortgage and the expense of owning a vehicle. As a result, local youth head to better-paying urban centres with more opportunities and suitable quality of life and don't return.

Education and Training – Challenges and Opportunities

Challenge – Build a bridge between business and education

Those who work in the education and training realm, believed there are more opportunities for collaboration among various players, specifically businesses and trade associations. Among employers, opinions ranged from wishing educational institutions took business needs more seriously to outright dismissal of the education system – saying business should take care of their training and avoid the educational system. The answer is likely somewhere in the middle, but a stronger bridge needs to be built among the various players facing the challenges. Besides, there could be more productive relations between levels of education, with one public education stakeholder complaining that post-secondary institutions do not spend enough time promoting their programs at the high school level. Business owners also felt students could be introduced to work experiences at a much younger age, but the system is not set up for this.

Challenge – Understanding and addressing attitudes of jobseekers and employers

Concerns were expressed about the gap between expectations of both employers and job seekers, with a grudging admission that business owners will need to shift their thinking more than those in the job market. Employers who embrace the realities of attitudes among job seekers, in general, are more apt to retain them for more extended periods. What motivated an employer to take a job when he or she was younger (stable job, income, settling down) might not be attractive to workers in today's society (seeking professional stimulation, advancement, gym pass, flex time). The good news is young newcomers from other countries, or other parts of Canada may share the mindset of employers – seeking stability, but willing to work hard. Again, employers will need to shift gears on how they attract and retain newcomers.

Opportunity – Enhance work experience programs

The Registered Apprenticeship Program was viewed as a positive program that helps build a connection between youth, educational institutions and employers, providing an all-important on-the-job experience for a job seeker and determining if they have a passion for the industry sector or not. There were negative aspects of RAP (e.g. transportation challenges for apprentices, higher insurance costs for employers), but the benefits outweigh the burden. A similar work experience program could be developed for new Canadians.

Opportunity – Employer input into training and employee recruitment

Post-secondary education institutions could enhance their relationships with local employers by listening to their concerns and addressing them. Lethbridge College's agricultural programs were highlighted as an excellent example for other industries and institutions to consider. Some worker recruitment and retention initiatives were praised, such as job fairs and competitions. Still, all could benefit from better communication between business, education, workforce agencies, economic development offices and other stakeholders.

Southwest Alberta Regional Skills Study Interview Summary – Southwest

Employers Point of View on the Local Regional Skills Gap

Economy in transition has a ripple effect

The loss of manufacturing jobs and the downturn in traditional oil and gas has been detrimental to associated service sectors, such as agri-food, IT, and others. As a result, jobs in some industries have moved out of province, so luring highly qualified employees back from further afield is very difficult.

Difficulty finding workers

Employers described the job market as tight, with a lack of qualified individuals to draw from. One established small business felt comfortable with the workers on staff but expressed concern that he had no training institution to assist him. A health care employer expressed concern about burn-out among existing workers, due to the economies of scale of expanding services in a small community. One employer is interviewing international candidates and from Toronto, because graduates from nearby universities were “OK, not great.”

Work ethic and training quality

Employers acknowledged a general lessening of work ethic among job seekers, although expressing concern that their employers are abusing some young people while other young people “act like King Tut.” Another employer voiced concern about the quality of education and training students were receiving. There is more demand for jobseekers to have a degree or diploma, but even if they do have the papers, they are not necessarily ready to work. One employer expressed concern that a worker could do an excellent job if they are balancing two or three responsibilities simultaneously.

Job Seekers Point of View on the Local Regional Skills Gap

Lack of full-time opportunities

People are working two or three part-time jobs to make ends meet, which empties the pool of qualified candidates.

Cost of training

Jobseekers are challenged to pursue the right education stream for full-time jobs, without going into debt with tuition. Education is costly, and many jobs require specific degrees or certificates that demand individual prerequisites. Jobseekers are concerned the jobs will be gone by the time they complete their training.

Quality of life is good, but

Many students and job seekers from other parts of Canada like the area and want to stay, but the length of contracts and hours available is a limiting factor. Eventually, they need to move to a community where employers provide a much more stable income. Then they can consider buying a house or taking a loan, something they cannot do on part-time hours.

Education and Training – Challenges and Opportunities

Challenge – Education institutions disconnected from businesses

Employers felt the education system is failing employers and job seekers in terms of a lack of career fairs, job placements, field trips to universities and colleges, and generally enhancing communication between those who train and those who employ. Some felt criteria and guidelines for programs developed by the education system do not meet the needs of employers.

Challenge – Who does what

Interviewees felt there were a variety of solutions and opportunities to assist employers and jobseekers but seemed confused about who was responsible. A general lack of leadership, collaboration, and understanding of the next steps were evident.

Opportunity – On the job experience

Stakeholders felt the focus should be placed on trying to get new graduates as much as experience and opportunity as possible. Students should be provided on-the-job experience while they are still in school. Employers should be asked to provide input into these programs, so they see the graduate as employable when they are being considered for a job.

Opportunity – Incentives for employers to hire full-time

Interviewees encouraged the government to find ways for employers to provide full-time jobs for job seekers, as opposed to casual workers. Also, providing incentives and highlighting the benefits of living and working in rural Alberta could help draw more jobseekers.

SOUTHWEST ALBERTA REGIONAL SKILLS STUDY

PHASE 1 SURVEY ANALYSIS REPORT

Contents

Key Themes from the Surveys

Two quantitative survey instruments were used in the Southwest Alberta Regional Skills Gap Study to provide evidence of potential skills gaps in the workforce and also to identify potential pathways towards their resolution. The job seeker survey was an online open web link sent to individuals in the Southwest Alberta Region who were in search of employment. The local employer survey was conducted via telephone targeting the businesses and organizations in the region. The detailed methodology and survey results are described in the next two sections. Here are some key themes that were identified for the Skills Gap Study from these surveys:

Worker training – The local employers survey identified that many local organizations find worker training was a challenge for their business. Out of 160 businesses who had reported experiencing challenges recruiting or retaining talent for specific occupations, 93% listed the availability of qualified candidates as either somewhat of a challenge or a significant challenge. On the job seekers' side, 71% rated the opportunities to enhance their skillsets in the region as poor or fair. This discrepancy highlights a potential source of friction in the labour force since businesses report a need for skills and qualifications that the potential workers feel they don't have enough opportunities to obtain.

Evidence of a skills gap – Among the local job seekers surveyed, 85% listed a lack of suitable job opportunities as somewhat of a factor or a significant factor hindering them from getting a job. Among the employers surveyed, 51% noted that they were somewhat or very dissatisfied with the availability of a trained, local workforce. This mismatch provides further evidence of a skills gap since both the demand and supply side of the workforce equation expresses a lack of options instead of just one side.

Soft skills – In many regions across North America, employers are increasingly reporting that job applicants lack soft skills compared to previous decades. In the Southwest Alberta Region, the rating of soft skills among local workers was moderately high from both employers and job seekers. Approximately 60% of local employers said that they were very or somewhat satisfied with the availability of workers with the necessary soft skills. Similarly, only 21% of job seekers mentioned skills training as a possible way to achieve their full employment potential. However, it is work noting that the availability of soft skills in workers was highly correlated with businesses' overall satisfaction with the Southwest Alberta Region as a place to do business, which placed this factor as a high priority to address. This finding signifies that workers' soft skills are highly valuable to businesses in the area, so any potential to enhance soft skills among workers in the area should be considered worthwhile.

Culture/immigration – The successful integration of a culturally diverse workforce can be a significant strength for a region. Similarly, immigrant talent can be an essential source of labour to fill gaps that might exist in the local workforce. In the Southwest Alberta Region, 62% of the employers who answered the questions about immigrant labour on the questionnaire listed language or ESL barriers as a factor that might impede them from hiring a position beyond entry-level. Further, 61% of the local employer respondents mentioned language and cultural training as support that would significantly increase their likelihood of hiring more immigrants.

Worker priorities – There was a perception among the job seekers surveyed that there is a lack of adequately paying jobs in the area, with 67% of job seekers rating this as poor or fair in the region. Further, 88% of the job seeker respondents listed wage rates and benefits as the attribute that they assign the most value to when making decisions about the jobs they pursue, and this was the most chosen factor. Wages aside, there were some other factors that job seekers valued in the jobs they pursued. When choosing their top 3 attributes that they assign the most value to, 79% chose interesting/fulfilling work, 68% chose job security, and 63% chose work-life balance. These statistics suggest that local employers may be able to significantly improve their recruitment of talent through other means than wages and benefits.

Professional Development – Investments in professional development opportunities could be an opportunity for recruitment and retention improvement in the Southwest Alberta Region. Among job seekers, 54% rated training/advancement opportunities as a top 3 attribute that they assign the value to when making decisions about jobs to pursue. On the employer's side, 31% reported spending less than $250 per employee on professional development activities. The amount spent on training varied greatly by employer, with 14% stating that they spend more than $3000 per year per employee.

In addition to these key themes that were identified in the two surveys, many other survey-specific insights were drawn from the analyses. The following two sections show the results from the questions ask on both questionnaires and dive deeper into the results from these surveys.

Southwest Alberta Local Employer Workforce Survey – Detailed Analysis

Summary of Key Findings

As a part of this Regional Skills Study, we surveyed Local Employers where representatives answered questions about their business' experiences with workforce recruitment and retention. The survey was conducted over the phone via Computer-Assisted-Telephone-Interviewing. This methodology yielded 309 responses from businesses in Southwest Alberta, with a margin of error of +/- 5.6% using a 95% confidence level.

As a part of the questionnaire, respondents were asked to rate various factors about operating a business in Southwest Alberta and critical factors that may be hindering them from attracting a diverse talent pool. Some key points that the responses identified were:

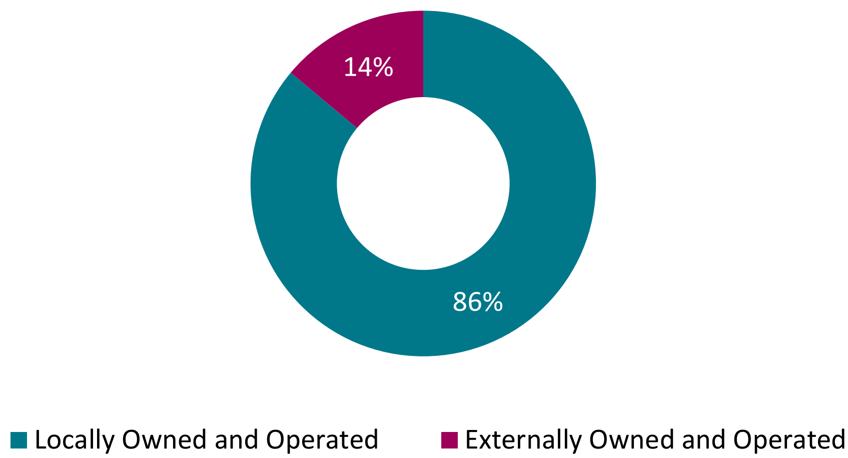
- **Businesses Satisfaction Level:** The majority of businesses surveyed were 'very satisfied' (48%) or 'somewhat satisfied' (43%) with operating a business in the Southwest Alberta region. In an additional question that ranked satisfaction levels for different factors, businesses indicated they were most satisfied with professional development opportunities for staff (26%) and the availability of workers with appropriate levels of education. Conversely, businesses showed lower levels of satisfaction with government and non-profit/community support activities (18%) and the availability of experienced workers in the region.
- **Businesses view challenges with talent attraction and retention:** The results were divided, with 48% of respondents indicating they had experienced a challenge during recruitment or retaining of talent and 52% that they had not.
- **Critical challenges in attracting a retaining talent:** According to survey responses, the most significant challenge was the 'availability of qualified candidates,' with 44% of respondents indicating this to be a significant challenge or somewhat of a challenge (49%). Other significant challenges included 'drugs & alcohol issues' (12%) and the 'availability of childcare' (12%). The perception of 'liveability in communities' was also identified by respondents as being a challenge.
- **Hiring intentions over the coming year:** Over half of the business respondents (52%) indicated that they were planning to hire a new employee within 12 months[1].

[1] Note that the data were gathered prior to the COVID-19 pandemic.

Local Employer Workforce Survey – Detailed Analysis

Among the businesses surveyed (see Figure 1), 86% were locally owned and operated, and 14% of businesses were externally owned and operated.

Figure 1: Which of the following best describes your organization?



As can be seen in Figure 2, Lethbridge had the highest concentration of organizations surveyed at 54%, followed by Taber at 16% and Cardston at 9%. The high proportion of Lethbridge respondents is likely due to the city's population compared to the rest of the region, ranking 4th in Alberta with 96,000 people[2]. Notable communities included in the 'other' category include Picture Butte, Fort Macleod, Vauxhall and Claresholm.

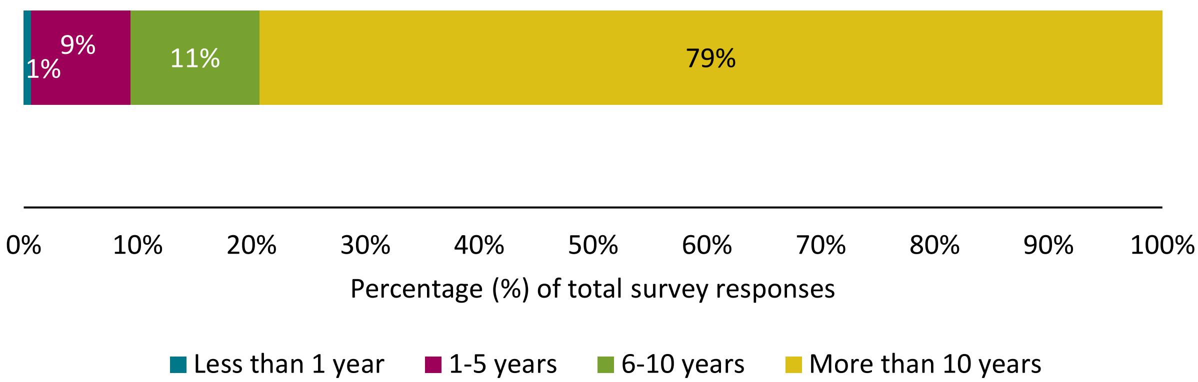
Figure 2: In what communities is your organization located?

Mention	Number	Percentage
Lethbridge	167	54%
Taber	50	16%
Cardston	27	9%
Vulcan County	25	8%
Willow Creek	13	4%
Pincher Creek	10	3%
Ranchland	1	0.32%
Other	94	30%

[2] Canadian Census 2016, City of Lethbridge Population

Among the 309 businesses surveyed (see Figure 3), there was a high concentration of established organizations, with 79% residing for more than ten years. Conversely, less than 1% of surveyed businesses indicated they had been in operation for less than a year.

Figure 3: How many years has your organization operated in the region?



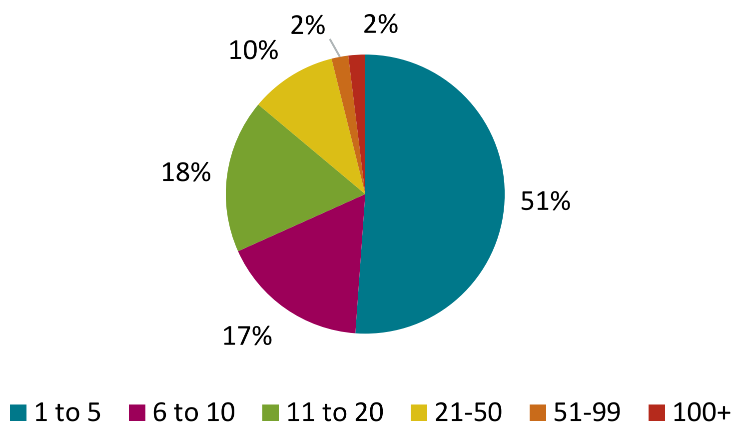
All survey respondents were asked to describe their organization's primary activities (see Figure 4). The highest proportion of activities included agriculture (19%), followed by manufacturing and transportation at 8%. The majority of businesses (57%) indicated that their primary industry was in an 'other' category than those listed. Common industries identified within this 'other' category included construction-based businesses, retail stores, and financial institutions.

Figure 4: Which of the following industries best describes your organization's primary activities?

Primary Activity	Percent
Agriculture	19%
Manufacturing (General)	8%
Transportation	8%
Healthcare and Social Assistance	5%
Tourism	1%
Manufacturing (Value-added food processing)	1%
Logistics and Warehousing	1%
Other	57%

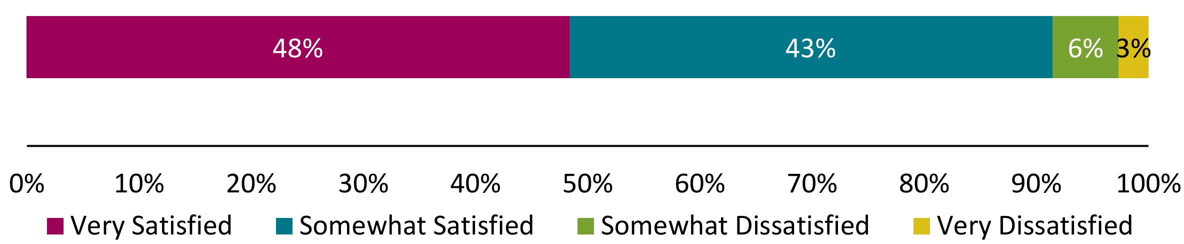
Figure 5 demonstrates the number of full-time employees within the 309 surveyed businesses. As can be seen in the data, the majority of businesses are small, with 51% (158 businesses) employing between 1 to 5 people and 17% (53 businesses) employing between 6 and 10. From a medium to large business perspective, there was a lower concentration, with only 4% of businesses employing 51 or more people.

Figure 5: Including yourself, how many full-time employees (30 hours or more) do you employ whose primary place of work is in the Southwest Alberta region?



As can be seen in Figure 6, the majority of businesses surveyed are either 'very satisfied' (48%) or 'somewhat satisfied' (43%) with operating a business in the Southwest Alberta region. Only a small percentage (6%) of respondents indicated they were 'somewhat dissatisfied' and an even smaller percentage (3%) that they were 'very dissatisfied.'

Figure 6: Overall, how satisfied are you with operating a business in the Southwest Alberta region?



Respondents were also asked to identify if they had experienced recruiting or talent retention challenges in the past year (see Figure 7). The results were split, with 48% indicating they had experienced a challenge during recruitment or retaining of talent and 52% that they had not. This may indicate a greater need for attraction and retention support services in the region.

Figure 7: Has your business experienced any past or present challenges in recruiting or retaining talent for specific occupations?

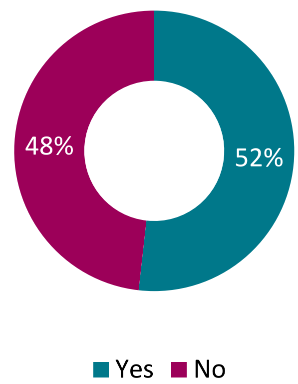
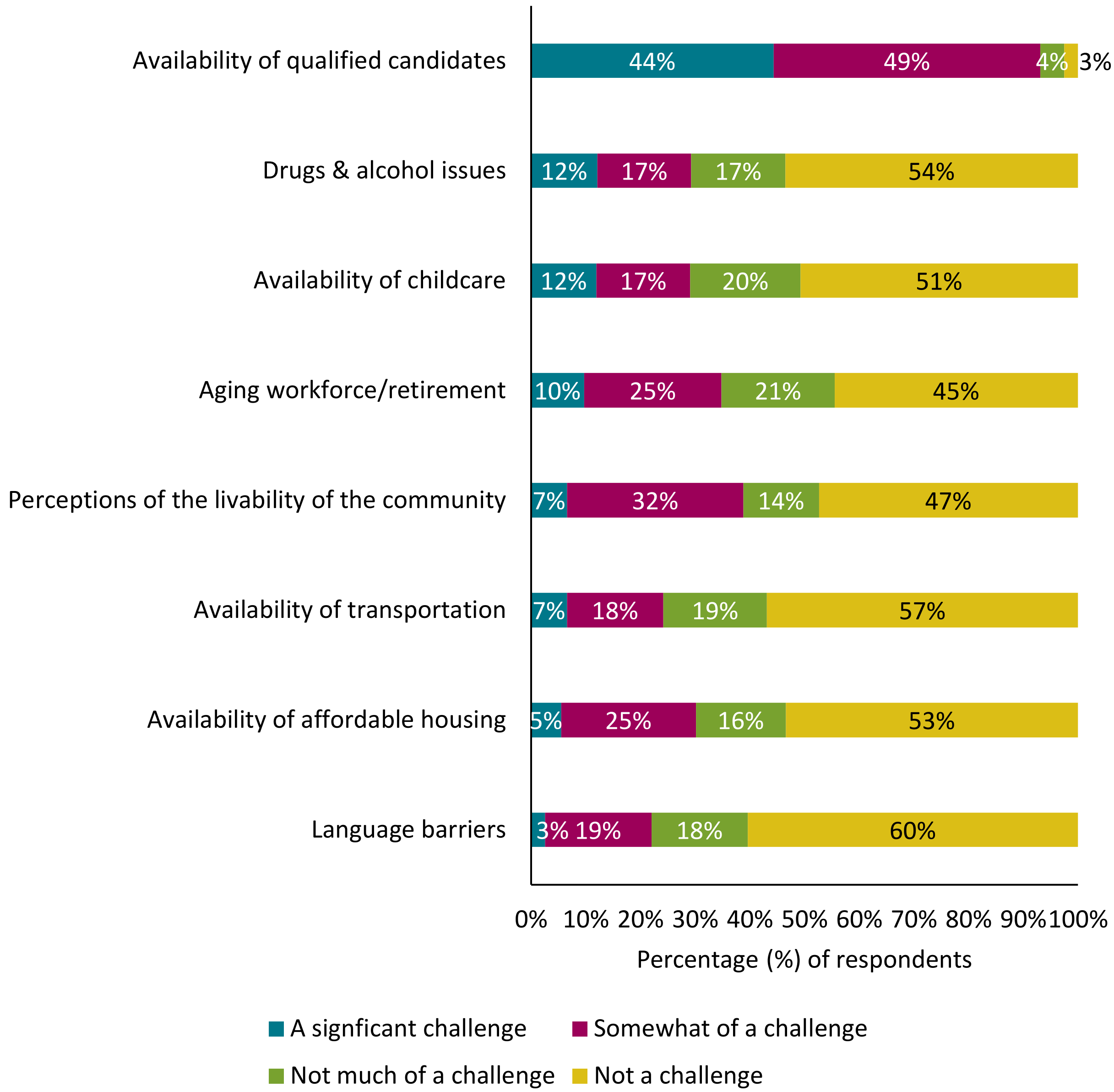


Figure 8 outlines the key recruiting, hiring, and retention challenges that business owners face in Southwest Alberta. According to survey responses, the most significant challenge is the 'availability of qualified candidates,' with 44% of respondents indicating it to be a significant challenge or somewhat of a challenge (49%). Other significant challenges included 'drugs & alcohol issues' (12%) and the 'availability of childcare' (12%). The perception of 'liveability in communities' was also identified by respondents as being a challenge in attracting talent, 7% indicating it to be a 'significant challenge,' and 32% 'somewhat of a challenge.' Factors of low relative importance in attracting and retaining talent included 'language barriers,' 'affordable housing,' and the 'availability of transportation.'

Figure 8: To what extent are each of the following a challenge when recruiting, hiring and retaining employees in your organization?



Respondents were also asked to indicate their hiring plans for the upcoming year. Out of the 309 businesses, just over half at 52% (162 businesses) indicated that they were planning to hire a new employee within 12 months and 48% (147 businesses) that they did not intend to hire.

Figure 9: Are you planning to hire new employees in the next 12 months?

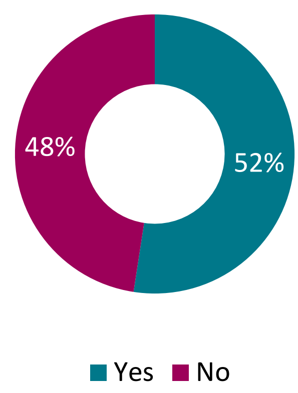
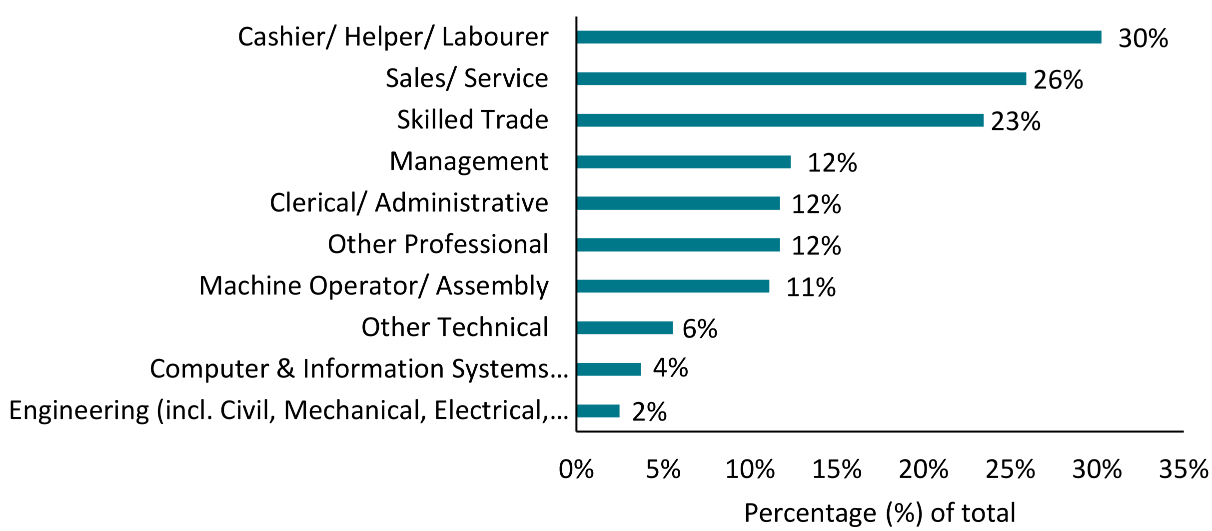


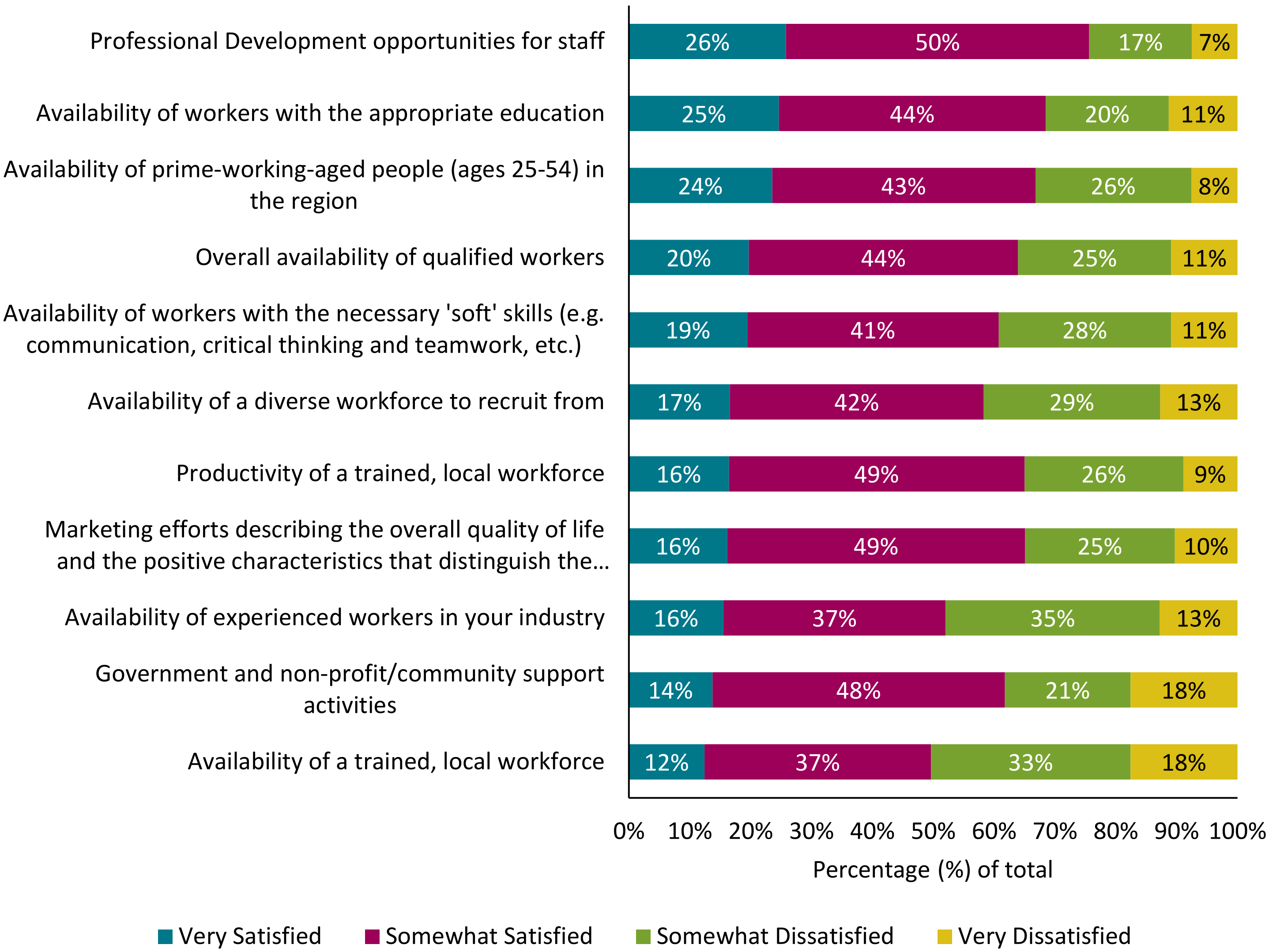
Figure 10 shows out of the 162 businesses likely to hire a new employee, which occupations or positions were most likely to be hired within a 12-month window. Based on the responses, it can be seen that unskilled labour is most in demand across the following year, with 'cashier, helper and labourers' ranked as the second-highest response at 30%, followed by sales and service at 26%. Higher skilled positions such as engineering and computer and information system professionals were less likely to be hired, with both categories recording less than 4%. Approximately a third of respondents (34%) indicated they would require 'other' occupations and positions in the upcoming year. Of these responses, notable themes included requiring drivers (including truck drivers), general labourers, veterinarians, and other trades (e.g. electricians).

Figure 10: Which occupations/positions do you expect you will most likely require?



As can be seen in Figure 11, respondents were most satisfied with professional development opportunities for staff, with 26% stating they were 'very satisfied' and 50% 'somewhat satisfied.' The availability of workers with the appropriate education and the availability of prime-working-aged people (age 25 – 54) in the region were the next two categories that respondents were most likely to be either 'very satisfied' or 'somewhat satisfied.' Conversely, the factors that respondents were most dissatisfied with included the availability of experienced workers in their industry (35%) and the availability of a trained local workforce (33%). Just over a quarter (28%) of respondents were 'very dissatisfied' with the availability of workers with the necessary soft skills and (11%) were 'somewhat dissatisfied.'

Figure 11: For each of the following statements, please tell me your level of satisfaction



Using local employers' levels of satisfaction on the various workforce attributes of the Southwest Alberta Region, we developed a priority matrix for the area (Figure 12). Using MDB Insight's unique methodology, we calculate the level to which each of the workforce factors is associated with changes in businesses' overall level of satisfaction operating a business in the area (shown in Figure 6). Together with the levels of performance on each factor (the percent of respondents rating the factor as 'very satisfied' or 'somewhat satisfied'), we calculate our priority ranking for the various workforce factors.

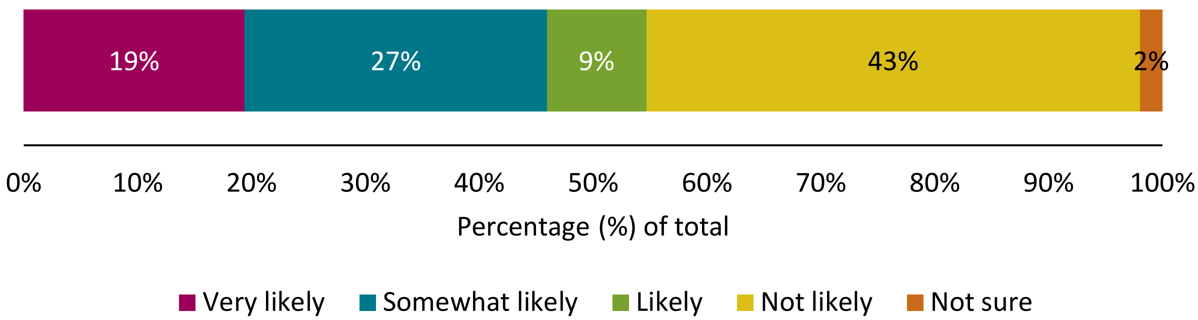
In the Southwest Alberta Region, the top three priorities were: the availability of a trained, local workforce, the availability of experienced workers in your industry, and the availability of a diverse workforce. These factors showed high levels of importance to overall satisfaction and low levels of performance. The relatively lower priorities in the region were: the professional development opportunities for staff, availability of workers with the appropriate education, and the availability of prime-working-aged people (ages 25-54) in the region. Priority rankings can be helpful to take into consideration, alongside the associated costs/challenges associated with taking action on certain workforce factors, to determine the most efficient ways to support businesses through workforce development in the region.

Figure 12: Workforce priority matrix

Workforce Factor	Level of Importance	Performance	Priority Rank
Availability of a trained, local workforce	7.9	50%	1
Availability of experienced workers in your industry	8.0	52%	2
Availability of a diverse workforce to recruit from	8.7	58%	3
Availability of workers with the necessary 'soft' skills (e.g. communication, critical thinking and teamwork, etc.)	7.9	61%	4
Marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace	8.5	65%	5
Overall availability of qualified workers	8.1	64%	6
Government and non-profit/community support activities	7.6	62%	7
Productivity of a trained, local workforce	7.7	65%	8
Availability of prime-working-aged people (ages 25-54) in the region	8.1	67%	9
Availability of workers with the appropriate education	7.6	68%	10
Professional development opportunities for staff	8.4	76%	11

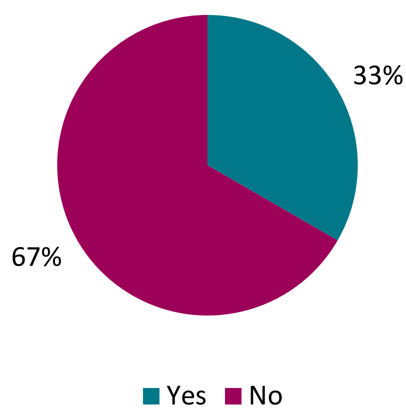
Respondents were also asked to indicate how likely difficulties with skilled labour retention or recruitment would impact their long term decision to stay in the Southwest Alberta region (see Figure 13). Nearly a fifth (19%) of responses indicated the factor to be 'very likely' and just over a quarter (27%) that is was 'somewhat likely.' Conversely, 43% of respondents indicated that labour retention or recruitment is 'not likely' to affect their decision to stay in the region.

Figure 13: How likely are difficulties with skilled labour retention or recruitment to influence your decision to remain operating your organization in the Southwest Alberta region?



As can be seen in Figure 14, among the 309 businesses in the survey, over half (67%) indicated that they recruit labour from outside of the Southwest Alberta region. This could indicate a lack of local skilled and unskilled talent in the region.

Figure 14: Does your organization recruit labour from outside the region to fill local positions?



The 103 businesses that responded that they recruit talent from outside of Southwest Alberta were also asked about where they recruit from (Figure 15). The three most often cited answers were 'Outside the region but inside Alberta' (80%), 'Outside Alberta, BC and Saskatchewan but inside Canada' (37%) and BC or Saskatchewan (36%). Only 21% of businesses mentioned recruiting from outside Canada, with the US being the primary recruitment destination.

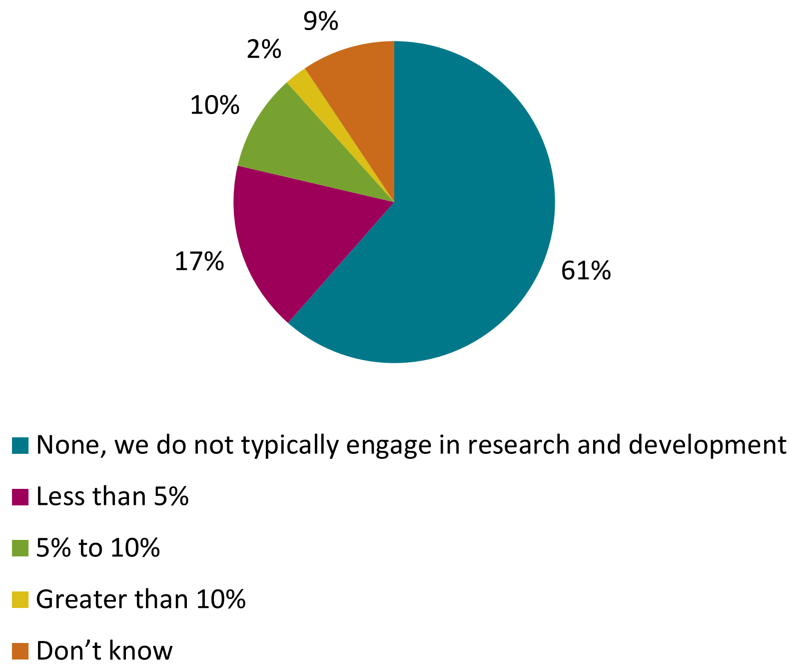
Figure 15: Where do you recruit from most often?

Mention	Percentage
Outside the region but inside Alberta	80%
Outside Alberta, BC and Saskatchewan but inside Canada	37%
BC or Saskatchewan	36%

Mention	Percentage
Outside Canada	21%

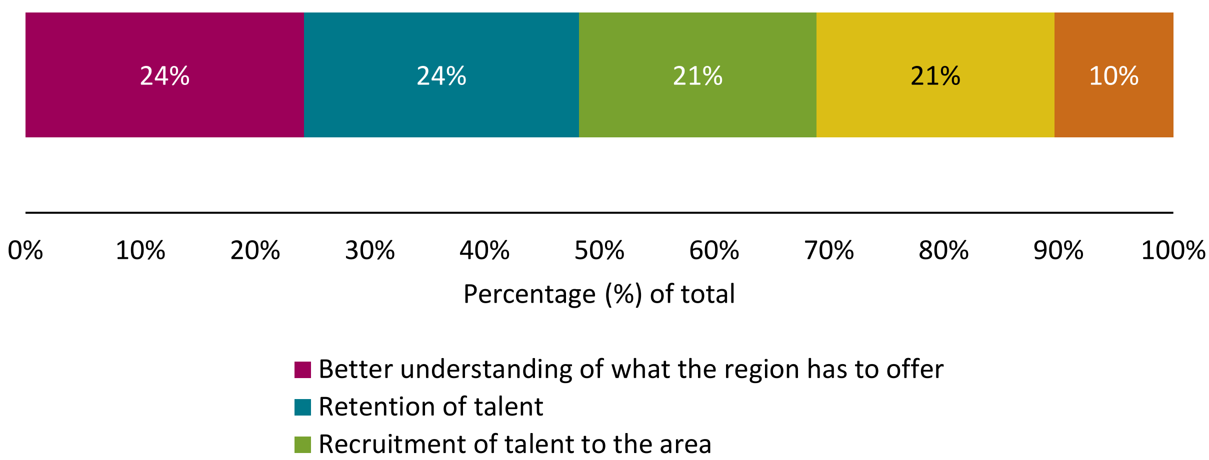
Out of the 309 businesses surveyed, the majority (61%) did not typically engage in research and development (R&D) activities. Among those that do engage in R&D activities, 17% (53 businesses) indicated they spend less than 5% of their revenue, and 10% (30 businesses) spend between 5 to 10 percent. Only 2% (7 businesses) indicated that they spend more than 10% of revenue on R&D activities.

Figure 16: If your organization is engaged in research and development, what percentage of your revenue do you typically spend on this activity?



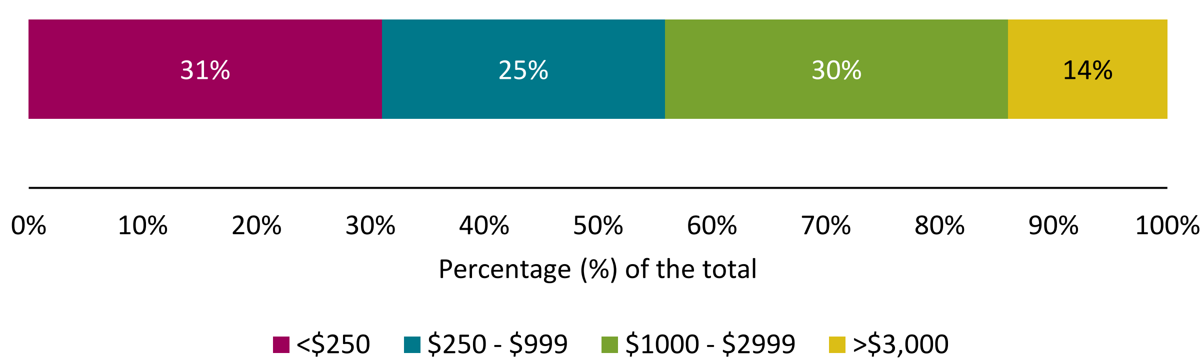
Respondents were also asked to indicate which labour force issue was the most important and should be addressed in this strategy (see Figure 17). The top two ranked issues that should be addressed were 'better understanding of what the region has to offer' and 'retention of talent,' which both received 24% of responses. 'Recruitment of talent to the area' (21%) was another key priority.

Figure 17: What is the most important labour force issue that must be addressed through this strategy?



During the survey, respondents were also asked how much they spend per employee on professional development activities (see Figure 18). Out of the 229 businesses that knew their professional development spending, a majority (31%) indicated that they spend less than $250. A further quarter spent between $250-$999, and only a small percentage (14%) spent more than $3,000. Interestingly, out of the 309 businesses surveyed, 80 respondents indicated that they did not know their professional development spend.

Figure 18: In a typical year, on average, how much per employee do you spend on professional development activities?



37% of all 309 businesses indicated that they expect the amount they spend on professional development to increase over the next five years, and 46% expect it to remain the same (see Figure 19). Only 3% of respondents expected this amount of decrease, and 14% were unsure.

Figure 19: Over the next five years, do you expect this amount to increase, decrease or stay the same?

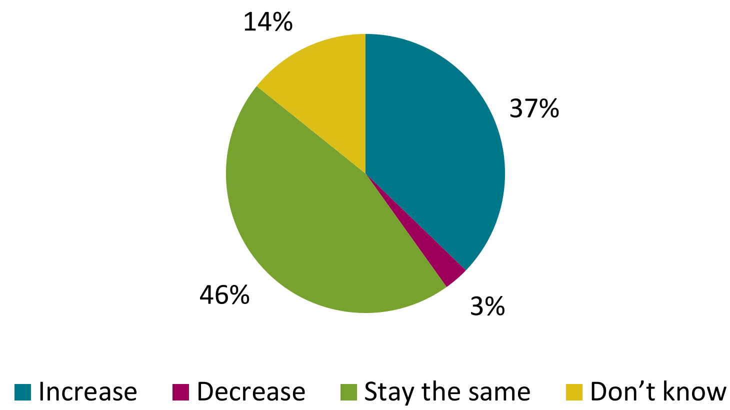
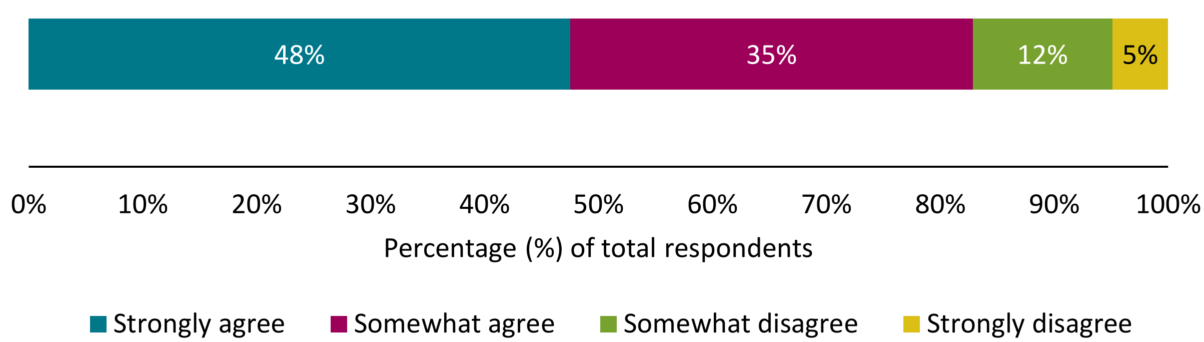


Figure 20 aims to understand the level of support the businesses have for employees seeking professional development opportunities. Based on the results from the survey, nearly half (48%) of respondents' strongly agree' that they are encouraging of employees seeking professional development and over a third (35%) that they 'somewhat agree.' Only 12% of firms indicated that they 'somewhat disagreed' with the statement and 5% 'strongly disagree.'

Figure 20: To what extent do you agree or disagree with the following statement: When my employees seek training to learn new skills, my organization encourages them to seek accredited training, even if it costs more.



Respondents in the survey were also asked if they would be willing to answer additional questions relating to the hiring of immigrant workers. The following three questions are based on responses from the 95 businesses, which indicated that they were willing to participate.

Respondents were asked to indicate the barriers that might impede them from hiring immigrant workers for higher-level positions beyond entry-level (see Figure 21). Language or English as a Second Language (ESL) was the top-ranked barrier at 62% of total respondents. Concern over the qualifications of immigrant workers was another critical issue (45% of respondents), as was the quality of their resumes (20%). Twenty respondents also indicated 'other issues' that impede hiring immigrant workers, such as the lack of relevant insurance, the high financial and time cost associated with doing a labour market impact assessment and a lack of understanding of the visa and regulatory requirements.

Figure 21: What barriers, if any, do you feel might impede you from hiring immigrant workers for higher-level positions that are beyond entry-level?

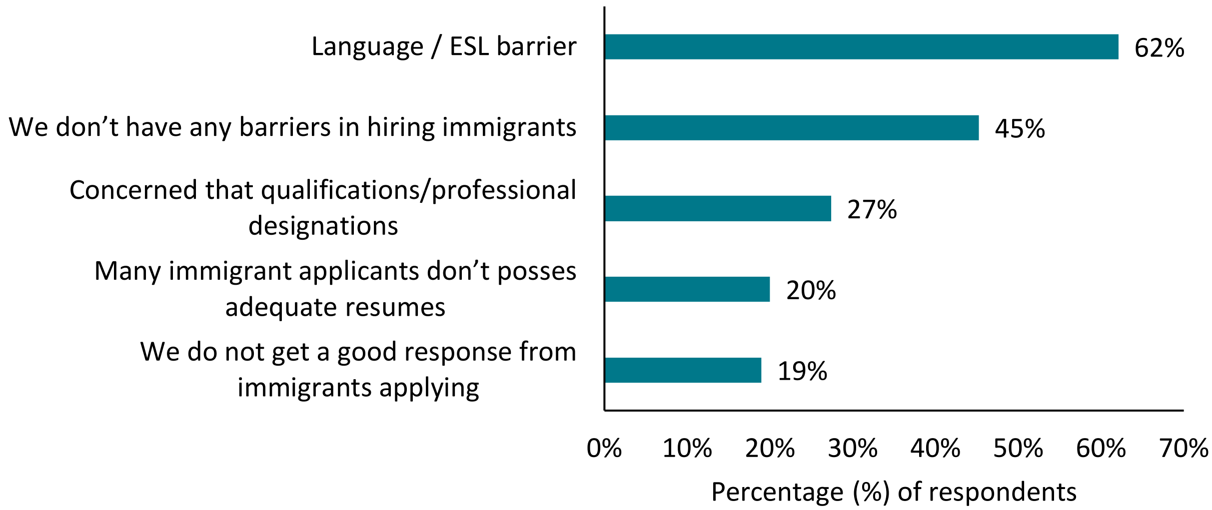
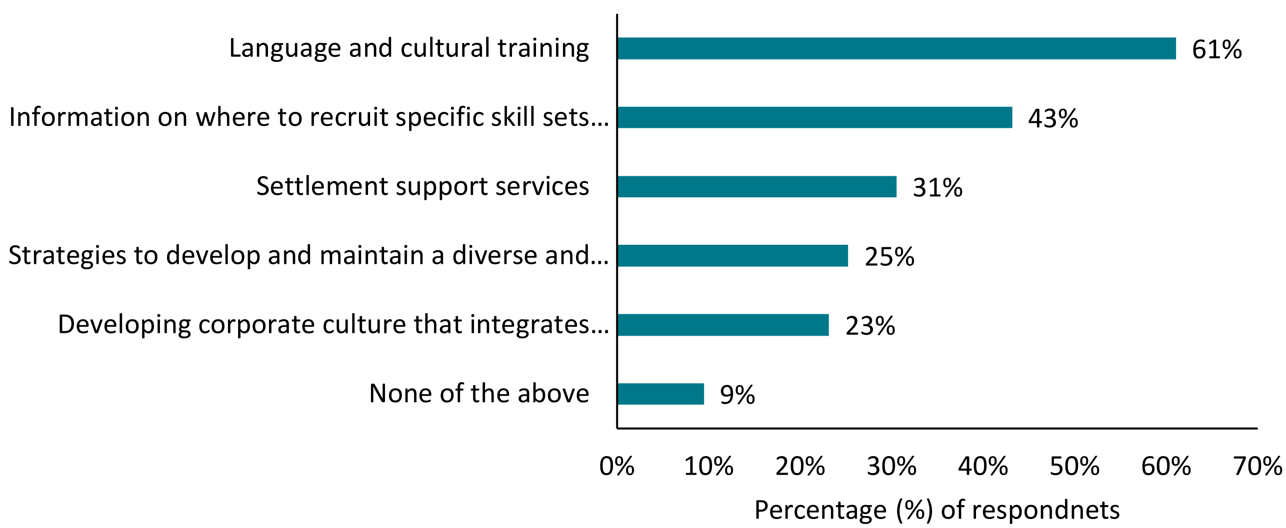


Figure 22 details the types of information and supports that businesses require to increase their likelihood of hiring immigrant workers. As can be seen from the responses, 'language and culture training' is the most critical at 61%, followed by 'information on where to recruit specific skill sets' at 43%. Other important support services identified included 'strategies to develop and maintain a diverse and inclusive workplace' at 40% and 'settlement support services' at 31%. Only 23% of respondents identified 'developing a corporate culture that integrates immigrants' as being important.

Figure 22: Please indicate which of the following types of information and support would significantly increase your likelihood of hiring more immigrants?



Respondents were also asked to indicate their preferred methods to obtain support and information (Figure 23). 'Sharing of best practices' was the top-ranked response at 81%, followed by 'workshops' and 'ESL Providers, ' which each received 69% of the total responses. Forums were the least chosen category at only 42%.

Figure 23: Which of the following methods listed below would be your preferred method to obtain the support and information you indicated in the last question?

Mention	Percentage
Sharing of best practices	81%
Workshops	69%
ESL providers	69%
Mentorship from other employers	67%
Webinars	66%
Immigrant hiring guides	65%
Cross-cultural training courses	64%
Forums	42%
Other	3%

Respondents to the job seeker survey were given the opportunity to provide open-ended responses to some questions about the employment opportunities in the Southwest Alberta region. These responses are summarized into themes below.

Figure 24: Open-ended questions

Question	Key Themes
Which occupations have been the most difficult to fill or retain?	- Drivers - General labourers - Management personal - Technicians - Veterinarians - Welders
Thinking about skilled workers, are there any specific skills, knowledge and/or abilities that you find difficult to hire or retain?	- Analytical skills - Strong technology skills and data manipulation skills - Basic driver skills (class 1) - Strong organization and communication skills - Technical engineering skills - Heavy equipment operators - Management skills - Leadership skills and taking the initiative

Question	Key Themes
What, if any, specific educational or certification programs or training would you like to see made available in the Southwest Alberta region to support future growth of your organization?	- More trainers for the class 1 & 3 drivers' license (Note: This was highly requested) - More agricultural certification programs (e.g., equipment operation) - Heavy equipment technician training - More computer technician and basic skills certification courses - Increased availability of training for indigenous populations
How have technological change and disruptive technology impacted your business in the past 5 years?	- Airbnb has reduced hotel occupancy - Automation has reduced labour costs for low skilled roles - Greater efficiency due to more advanced equipment (but higher costs to constantly update the system and hire people with technical skills) - Greater marketing opportunities and online presence but also higher levels of competition - Greater need for training on computer skills for employees - Communication has switched to being primarily online or via text messages
How can the economic development organizations and/or post-secondary institutions best support your business in dealing with technological change over the next 5-10 years?	- Increasing computer skills training for students and allowing for ICT upskill training for current employees (e.g., Excel and other data manipulation programs) - Aiding firms to take their products and services online (e.g., workshops/grants) - Greater promotion of how automation is affecting the workforce and support for those groups most affected - Subsiding some new technology software's - Supporting greater internships in local businesses to ensure talent has opportunity to develop

Question	Key Themes
What best or promising practices have you implemented in your business to support your retention and recruitment of talent?	- Good benefits program - Health and fitness access for employee well-being (either in the office or discounted gym membership) - Accommodating work schedules for students/staff with young families - Competitive salary - Professional development opportunities - Create a positive work environment with team bonding activities
You mentioned something other as being when recruiting, hiring, and retaining employees, could you please specify the other challenge?	- Wages in the oil and gas industry are high meaning it is hard to attract talent to other sectors - Tourism is in a downturn meaning there is not enough work for people to be hired - The remoteness of communities has made it hard to access, and not is attractive to many people

Southwest Alberta Job Seeker Survey – Detailed Analysis

Summary of Key Findings

An online survey was advertised to job seekers in the SouthWest Alberta Region in March 2020. The survey ended with 56 completed questionnaires and a margin of error of +/- 13% with a 95% confidence level. Respondents were asked about their perceptions of the local labour market and the available jobs in the SouthWest Alberta Region.

As a part of the questionnaire, respondents were asked to rate various factors that may be hindering them from getting a new job/better job (Figure 15). Some key points that the responses identified were:

- **Job seekers' current job status:** The most significant proportion of respondents were currently working in a management or a cashier/helper/labourer role, and 75% of them were making less than $35 an hour.
- **Job seekers view of the job market:** If respondents could choose to work in any industry, 22% were not sure where they would like to work. When looking at job seekers' view of the job market, respondents often felt there was a lack of relevant educational programming and poor or fair jobs that match their skillset.
- **Job seekers view the job search support system:** Jobseeker respondents primarily used online job boards such as indeed and Workopolis for their job search and relied on job description information and employer websites to decide on their career paths. A large proportion of them used federal and provincial government websites to find relevant labour market information and had not worked with an employment service organization.
- **Job seekers' view on skills and training**: A large portion of job seeker respondents felt that access to opportunities and career/employment counselling would help them achieve their full employment potential. They also feel on the job training, and a professional designation would enhance their employability.

Detailed Analysis

Sample Employment Characteristics

The following section outlines the demographic and economic characteristics of the respondents in the Job Seeker survey. The respondents represented a variety of age and employment-status groups in the Southwest Alberta Region.

Figure 25: Are you currently employed?

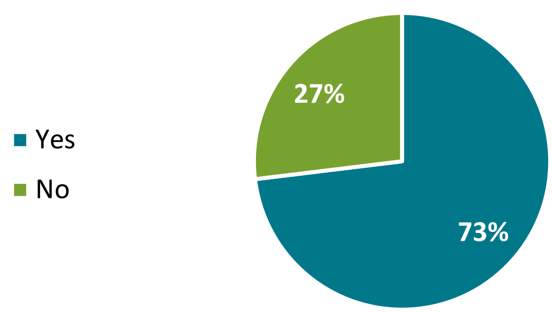


Figure 26: Are you seeking new/additional employment?

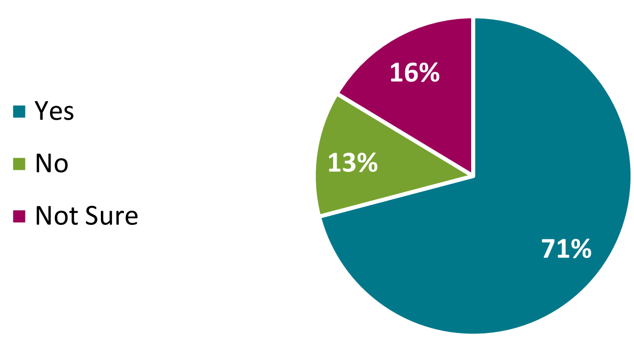


Figure 27: Do you consider yourself to be under-employed?

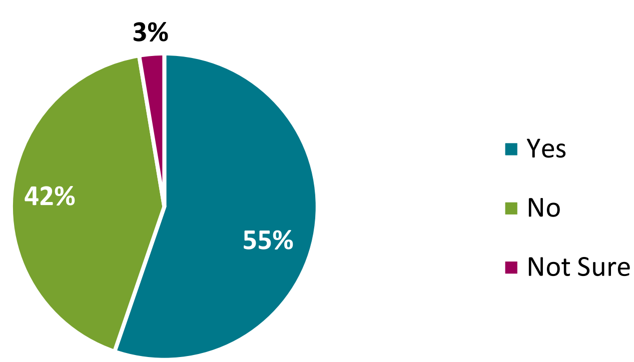


Figure 28: How long have you been actively seeking employment?

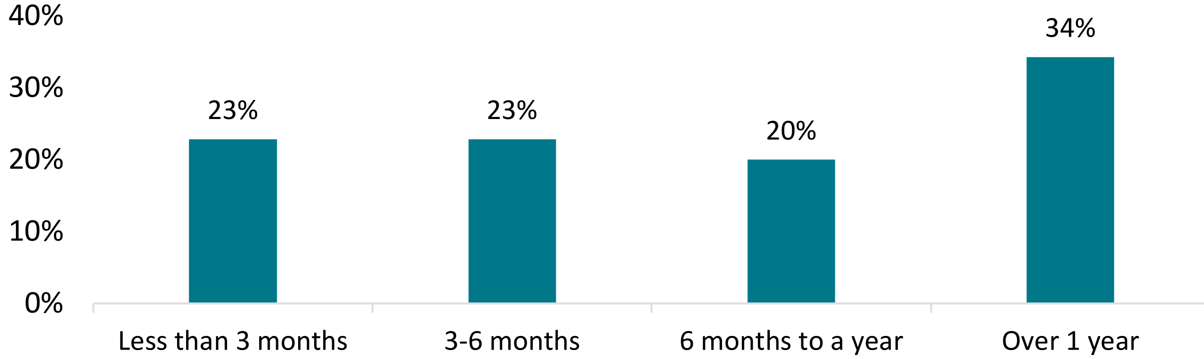


Figure 29: Would you consider moving out of the Southwest Alberta Region to secure employment?

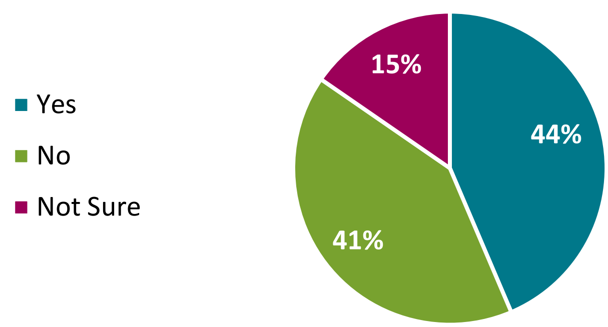
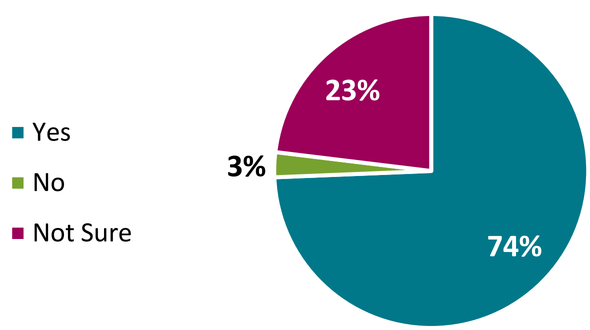


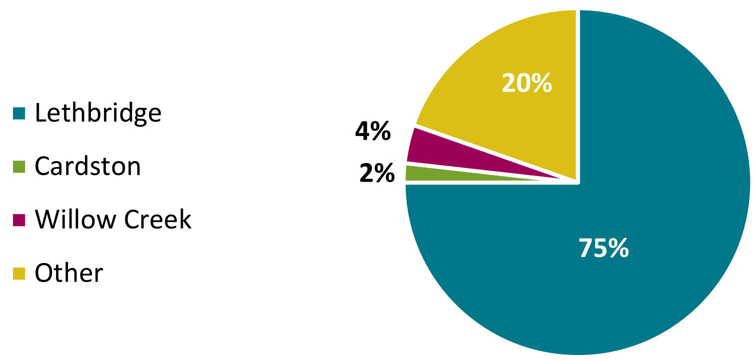
Figure 30: Would you consider retraining to be better prepared for local employment opportunities?



Residence of Respondents in the Southwest Alberta Region

75% of respondents reside in Lethbridge and, 4% are from Willow Creek, 2% are from Cardston, and 20% of respondents are in other regions such as Nobleford, Stirling, Warner County, Coutts and Milk River.

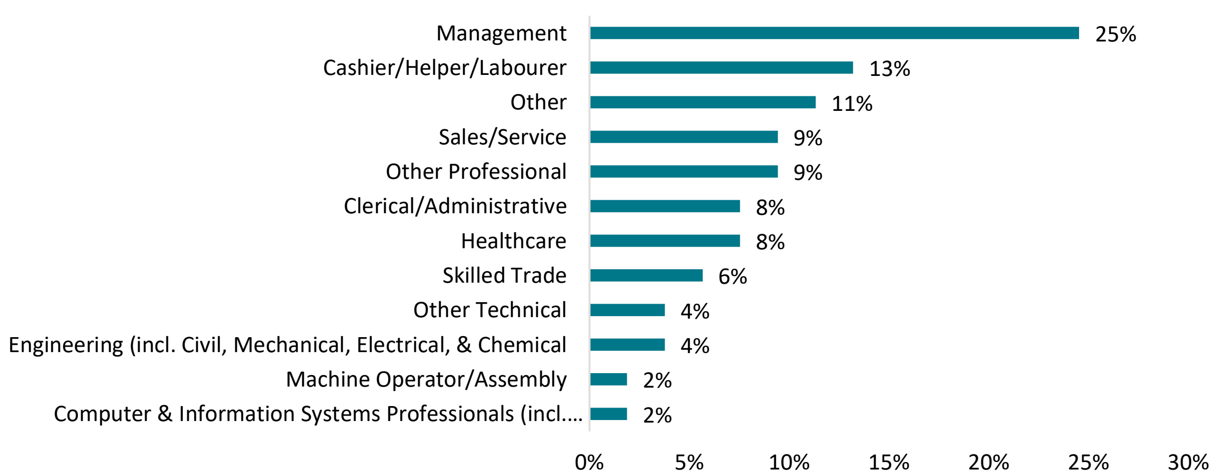
Figure 31: Where in the Southwest Alberta Region do you currently live?



Classifications of Current Job

When asked about their current jobs, the top three classifications were management at 25%, cashier/helper/labourer at 13%, and other at 11%. Other classifications included human resources, journalism, and education; among others, when respondents were asked what their specific occupations, the most common responses included cook, retail management, food delivery, janitor and sales.

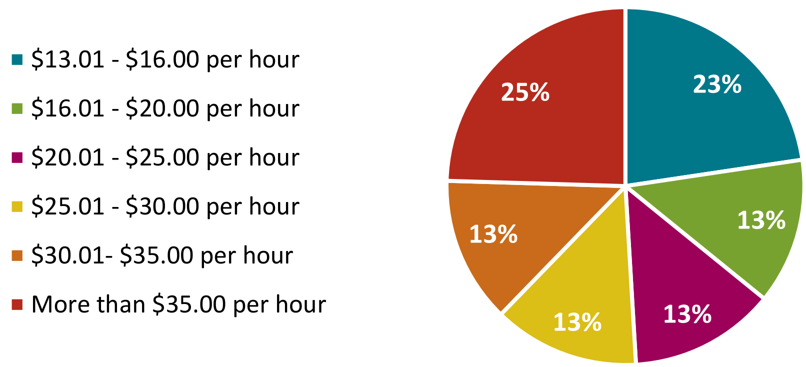
Figure 32: Which of the following best classifies your current/most recent job?



Average Hourly Wage in Current Job

When asked what the average hourly wage that respondents were receiving at the time of survey or in their most recent job, 48% of respondents stated they are making between $16.01-$35.00 per hour. 23% stated $13.01-$16.00, and 25% of respondents stated over $35/hour.

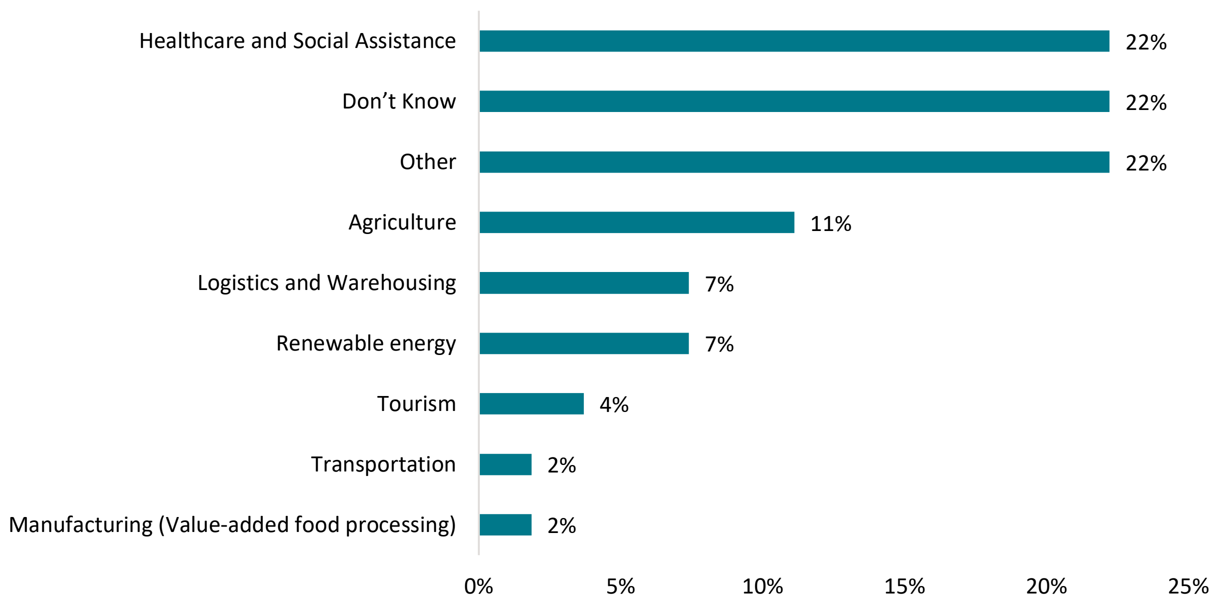
Figure 33: What is the average hourly wage (excluding benefits) you earn in your current job? If you are not currently working, please tell us the average hourly wage that you earned in your most recent job?



Industry of Preference

When asked what industries respondents would prefer to work in, 22% did not know, and 22% of respondents stated they prefer to work in the healthcare and social assistance industry. Other industries commonly mentioned include technology, communications, public sector, and business consulting.

Figure 34: In what industry would you prefer to work?



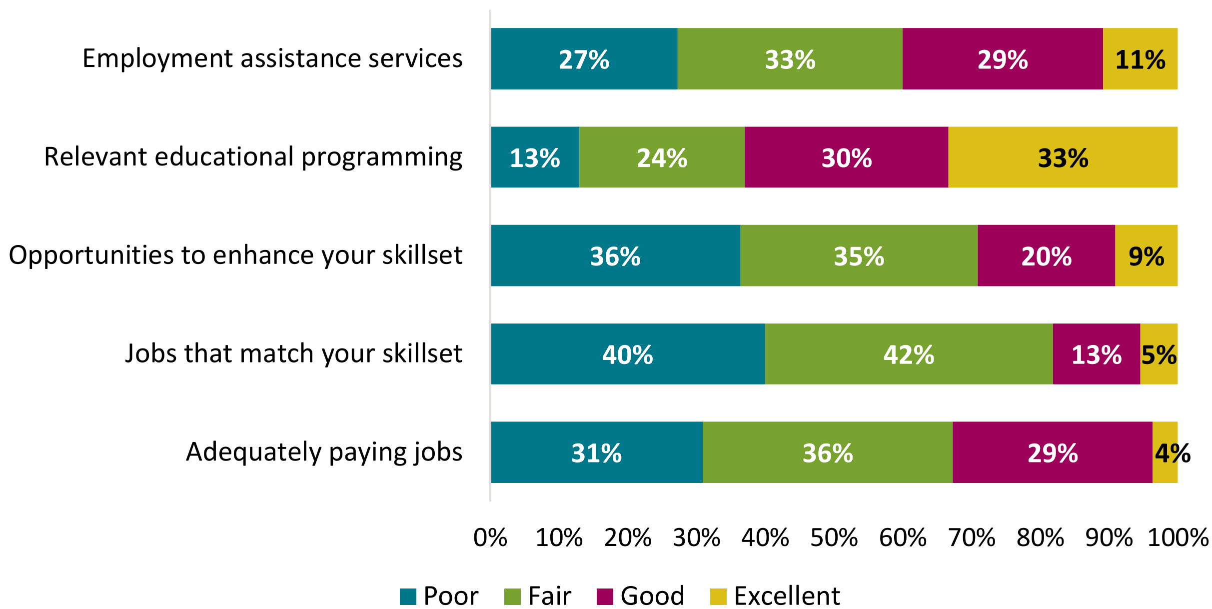
Ideal Job Based on Qualifications

When respondents were asked to think about future employment and their ideal job based on current qualifications, the most common responses were occupations such as management, policy analyst, data analyst, and dental assistant.

Rating of Employment Assets in The Region

When asked to rate the employment assets in the region, individuals rated the employment assistance services moderately, with 62% of respondents indicating these were good or fair. 63% of respondents rated the educational programming good or excellent on the other hand, 71% of respondents feel there are poor or fair opportunities to enhance their skill set, and 82% feel there are poor or fair jobs that match their skillset. 67% of respondents rated poor or fair, for adequately paying jobs.

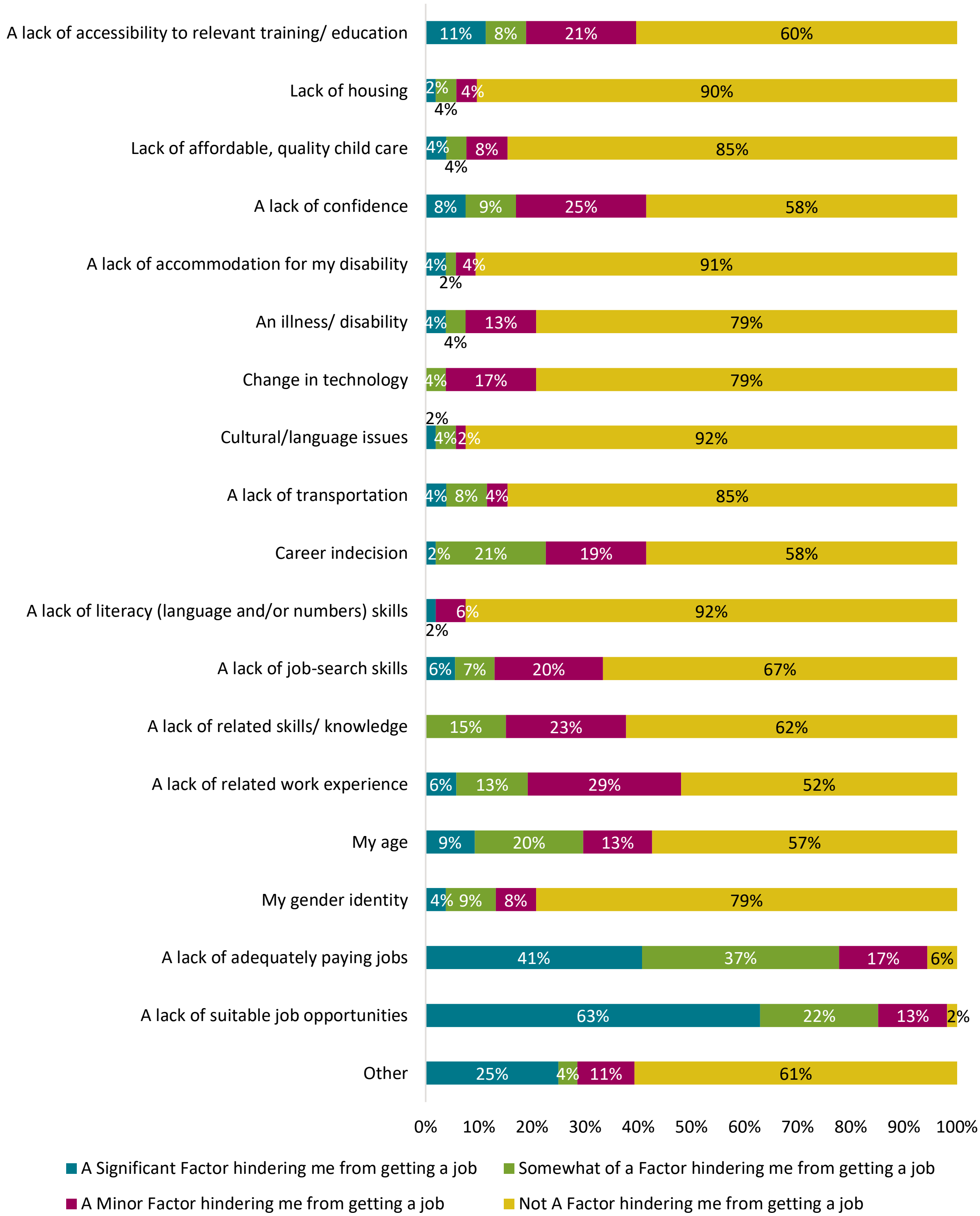
Figure 35: Please rate the Southwest Alberta region's availability …



Factors Hindering the Ability to Get a Job

When asked what factors are hindering the ability to get a job, a lack of quality paying jobs and lack of suitable job opportunities were the most noteworthy with 78% and 85% of respondents respectively stating these are factors significantly or somewhat hindering their ability to get a job. Other factors that were mentioned include employers not wanting to hire workers from the oil sands because they feel they will leave the region, insurance for international students is too high and cultural barriers, particularly for indigenous people. Respondents also felt they might lack confidence or the ability to access affordable education.

Figure 36: Which factors may be hindering you from getting a job/ a better job?



Methods Used When Looking For a job

Respondents listed the method they use to look for a job. The most commonly listed methods were online job boards, which were mentioned by 79% of respondents, social media at 45% and word of mouth at 43%. Other methods of looking for a job that were mentioned include career emails local universities and walking into workplaces and handing out resumes.

Figure 37: Which of the following methods have you used when looking for a job?

Mention	Percent
Online job boards (Indeed, Workopolis, etc.)	79%
Employer websites	48%
Social Media (Facebook, Twitter, Linkedin, Kijiji, etc.)	45%
Word of Mouth	43%
Local Employment Agencies	18%
Head-hunters, professional recruiters	11%
Job fairs/career fairs	11%
Advertising - newspaper	9%
Other	11%

Valuable Attribute When Making A Decision About Pursuing a Job

Respondents also listed the attributes of a job that they assign the most value when deciding to pursue a job. The most commonly mentioned attributes were wage rates and benefits at 88%, interesting/fulfilling work at 79% and job security, which was mentioned by 68% of respondents.

Figure 38: Which attribute do you assign the most value to when making decisions about the jobs you pursue?

Mention	Percent
Wage rates and benefits	88%
Interesting/fulfilling work	79%
Job security	68%
Work-life balance	63%
Training/advancement opportunities	54%
Company culture	52%
Flexible hours	45%
Upwards mobility	36%
Corporate responsibility	29%
Ability to participate in innovation/technological advancement	27%
Potential for remote work and work-from-home	16%

Labour Market Information, Tools or Services Used in The Past to Make Career Decisions

Respondents in the sample also mentioned some labour market information, tools and services they had used in the past to help decide their career path and choose their current industry. Commonly cited types of information were job description information/occupational and skill profiles (66%), employer websites (59%), and wage and benefits (57%).

Figure 39: Which of the following labour market information, tools or services have you used in the past to decide your career path and choose your current industry?

Mention	Percent
Job description information/occupational and skill profiles	66%
Employer websites	59%
Wage rates and benefits	57%
Job/resume banks	50%
Employer databases/links	29%
Licensing/credential requirements	20%
Availability of workers in the industry	18%
Occupational shortages and surpluses	16%
Employer recruiting practices	16%
Availability of training institutions for specific occupation	16%
I have never used labour market information, tools or service	13%
Legal requirements/labour code information	9%
Hiring of special employee groups (e.g. employment equity gr	4%

Sources Used to Find Relevant Labour Market Information in

The sources respondents used most often to find relevant labour market information were Federal government websites/publications such as business services (50%), provincial government website/publication (45%) and educational institutions, which was mentioned by 36% of respondents. Other sources mentioned include websites such as LinkedIn, Glassdoor and Indeed.

Figure 40: What source(s) do you typically use to find relevant labour market information?

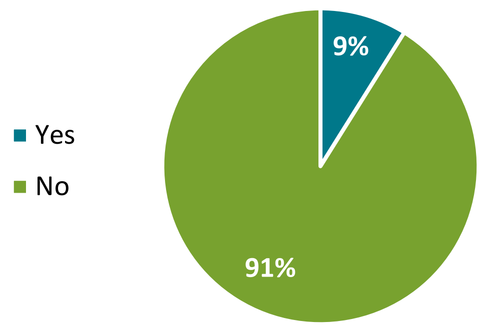
Mention	Percent
Federal government website/publication such as Business Service	50%
Provincial government website/publication	45%
Educational institution	36%
Colleagues	27%
Professional association/union/employee association	20%
Local employment support organizations	20%
Sector Council/Industry association	16%
Local business associations	14%
Private consulting firm	11%

Mention	Percent
Equipment suppliers	5%
Other	7%

Working with an Employment Specialist

91% of respondents reported that they were not using an employment services representative.

Figure 41: Are you currently working with an employment service organization to help you conduct your job search?



Assistance Needed to Achieve Full Employment Potential

Respondents in the sample also mentioned the types of assistance that they feel they need to achieve their full employment potential. The majority (79%) of respondents felt they needed more access to opportunities. Other commonly-mentioned assistance tools were career/employment counselling (34%) and skills training (27%). Respondents who selected the 'other' category commonly mentioned the potential benefits of mentors working in their industry.

Figure 42: What assistance do you need to achieve your full employment potential?

Mention	Percent
Access to opportunities	79%
Career/employment counselling	34%
Skills Training	27%
Jobseeker assistance	21%
Access to labour market information	14%
Retraining programs	14%
None, I don't need any assistance	5%
Other	13%

Types of Training That Would Enhance Employability

When asked what types of training respondents would consider enhancing their employability, 'on the job training' was the option selected the most often (48%). A professional designation (39%) or a university degree (32%) were also commonly mentioned. Advanced skills training (advanced excel, outlook, time management, project management) that did not involve going back to university was commonly mentioned in the 'other' category.

Figure 43: Which of the following types of training would you consider to enhance your employability?

Mention	Percent
On the job training	48%
Professional Designation	39%
University Degree	32%
Essential Skills	29%
Certification	21%
College Diploma	20%
Apprenticeship	9%
None, I don't need any additional training	9%
Other	7%

Additional Information Needed to Be Successful in Your Job Search

When respondents were asked what, if any additional information they needed to be successful in their job search, they responded with information on job qualifications, education needs, and extra guidance from a life coach.

Background Demographic Information

Figure 44 Which of the following represents your age?

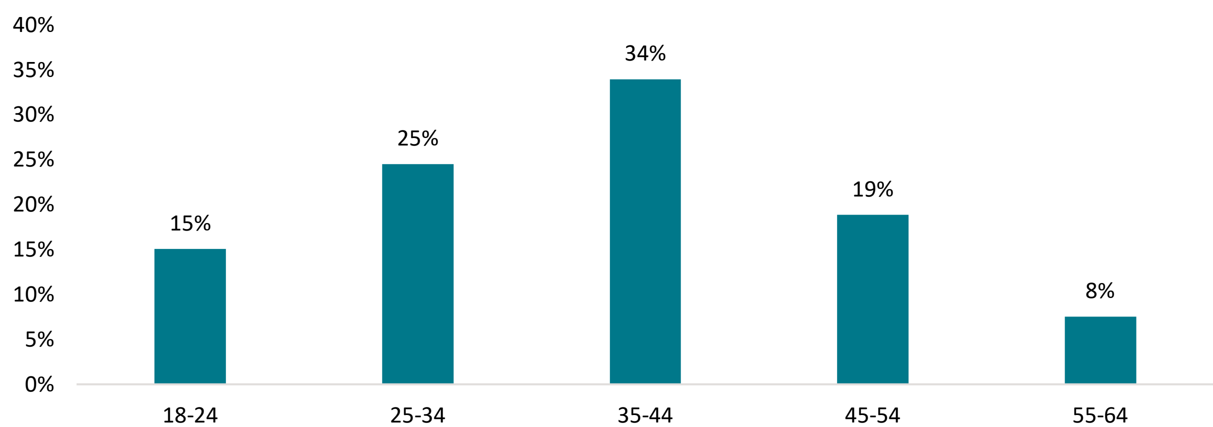


Figure 45: What is the highest level of educational attainment you have?

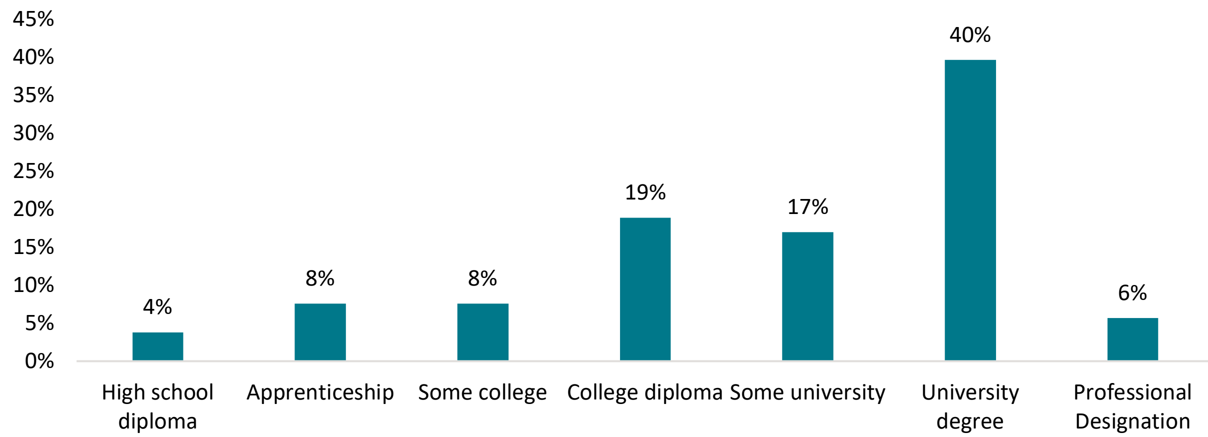
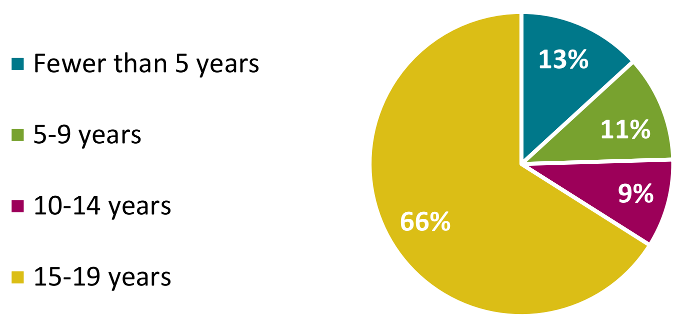
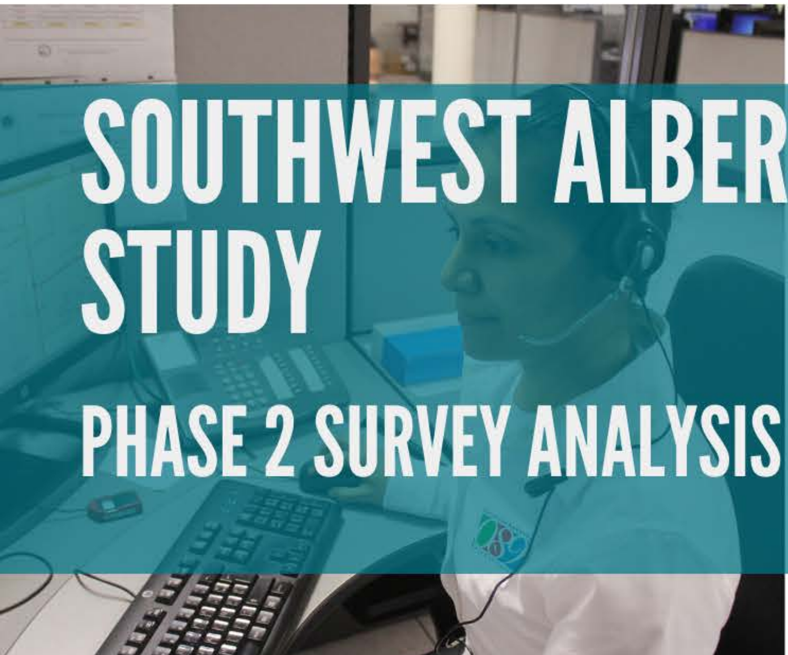


Figure 46: How long have you lived in the Southwest Alberta region?





MDB INSIGHT

SOUTHWEST ALBERTA REGIONAL SKILLS STUDY

PHASE 2 SURVEY ANALYSIS REPORT

Survey Input Summaries

Second Phase Business Survey

As a part of the Regional Skills Study, local employers were surveyed about their business's experiences with workforce recruitment, retention and skills. The survey was conducted via Computer-Assisted-Telephone-Interviewing. This methodology yielded 95 responses from businesses in the Southwest Alberta region, with a margin of error of +/- 10.1% using a 95% confidence level. The survey was completed in two phases: the first ran in March 2020 and the second in June 2020. Since the first phase was completed leading up to the COVID-19 pandemic in Canada, some additional questions were included in the second phase surrounding the impacts of the pandemic on local businesses. This report describes the outcomes of the second phase survey, and also the changes in the responses compared to the first phase report (the first phase report is included separately).

Summary of Survey Insights

COVID-19 has hampered business growth: One of the core focuses of the second phase business survey was to understand the impacts and implications of COVID-19. The pandemic has had a significant impact on local business productivity, growth, and employee retention. For example, 71% of businesses indicated that business activity had decreased significantly or slightly during the crisis, with less than 5% stating there had been any business growth at all.

During COVID-19, more employers temporary laid-off staff instead of terminating their contracts: A positive trend identified was of those employers that reduced staff numbers, 36% temporarily laid-off their workforce compared to the 17% of respondents who indicated they terminated staff contracts. Furthermore, 35% of respondents indicated that they re-hired back previously laid off staff. Overall, the data suggests that Federal and Provincial COVID-19 support programs such as the Canadian Emergency Response Benefit (CERB) are proving effective at encouraging employee retention.

Businesses have been forced to adapt workplace policies in response to COVID-19: Adapting quickly to the pandemic was a core insight gathered from the survey with top mentioned responses including limiting employee travel (37%), shortening hours of operation (33%) and requiring employees to work from home (24%). Additionally, employers noted greater focus had been placed on supporting employee's complete professional development training (24%). Overall, nearly half of respondents felt that if the pandemic continues or worsens, it will be business as usual, and only 22% mentioned potentially needing to lay off more staff.

Transitioning to a work from home model is gaining momentum: As noted above, working from home has gained considerable traction for many employers during the pandemic, with nearly half (46%) of respondents indicating that 1 to 49 percent of their workforce can work from home. However, more progress must be made to completely transition jobs online, with only 12% of respondents indicating their whole workforce is now digital.

Business satisfaction is still high for operating within Southwest Alberta: 95% of respondents indicated they were either very satisfied or somewhat satisfied with operating a business in the Southwest Alberta region.

Pre-COVID-19, the availability of qualified candidates and an ageing workforce/retirement were

critical regional issues: 62% of respondents indicating lack of qualified candidates to be either a significant challenge or somewhat of a challenge and 22% regarding an ageing workforce

Difficulties with labour attraction/retention remain critical indicators of employers likelihood of remaining in the region: A critical insight noted was that for over half of businesses (57%), difficulties with labour retention is either very likely or somewhat likely to impact their decision to remain operating in the region.

Conversely, before the pandemic, the availability of transportation and childcare were the least challenging issues: With 92% of respondents feeling that availability of transportation was not a challenge or not much of a challenge, followed by 88% of respondents regarding the availability of childcare.

Nearly half of businesses are still considering hiring within the next 12 months and require skilled employees: 48% indicated they are planning to hire within the year. The top two in-demand occupations mentioned were skilled trade (28% mentions) and sales/service occupations (26% mentions).

The highest priority workforce factors in Southwest Alberta were the availability of experienced workers, availability of a trained, local workforce, and marketing efforts describing the overall quality of life: These factors received a high priority ranking and represented potential avenues for improvement.

Key Changes from First Phase Local Employer Survey

Overall, businesses' ratings of local factors improved in the second phase compared to the first phase: In rating to what extent various factors were a challenge when recruiting, hiring, and retaining employees in their organization, all of the factors included had a higher proportion of businesses responding 'Not a factor' in the second phase compared to the first phase. Similarly, businesses were asked to rate the level of satisfaction with a range of local workforce factors, and each factor had a higher rating in the second phase compared to the first. While one might expect the impact of COVID-19 to have the opposite effect due to the workforce difficulties caused by the pandemic and provincial emergency order, the more significant issues caused by the pandemic (legislated closures, loss of business, broken supply chains, etc.) may be overshadowing the workforce issues as significant concerns for the organizations. Further, in June 2020, Alberta (and much of Canada) was already in a recovery phase, which may have influenced the business's overall outlook and optimism in a positive manner.

Some Challenges have shifted in the second phase: Amongst the potential challenges for recruiting, hiring, and retaining employees, drug and alcohol problems had become less of a significant factor among organizations. In contrast, the availability of adequate housing had moved up in businesses' relative ratings of factors (note that these are relative rankings since all factors were rated as less significant challenges overall compared to the first phase).

Some workforce priorities had changed in the second phase: Amongst the ratings of workforce factors in Government and non-profit/community support activities moved lower in the priority ranking, primarily due to the increase in performance ratings of this factor. Two factors had shifted upwards in their relative priority - marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the broader marketplace; and the productivity of a trained, local workforce. Both of these factors showed an increase in their relative importance (the amount which organizations' overall satisfaction with operating a business in Southwest

Alberta relates to the factor). As potential explanations, the former factor may be attributable to the difficulties currently experienced in the tourism industry, and the latter could be due to the difficulties experienced by organizations in keeping the workforce productive during times of physical restrictions and virtual communications.

The relative importance of many factors to organizations had not changed: When rating the significant challenges for recruiting, hiring, and retaining employees, the availability of qualified candidates was the factor which was most often rated as a significant challenge in both the first and second phases. Similarly, language barriers and availability of transportation were some of the least likely factors to be rated as a significant challenge by the organizations in both phases of the survey. The two highest-ranking priorities in both phases of the survey were the availability of experienced workers and the availability of a trained local workforce.

1.1 Second Phase Job Seeker Survey

The second phase online survey was advertised to Job seekers in Southwest Alberta in June 2020. The survey ended with 215 completed questionnaires and a margin of error of +/- 6.7% with a 95% confidence level. Respondents were asked about their perceptions of the local labour market and the available jobs in the Southwest Alberta Region after COVID-19.

Summary of Survey Insights

Implications of COVID-19: 79% of respondents mentioned very likely or likely going to consider employment in occupations that you may not have considered in the past. Post COVID-19, Food services, healthcare, and agriculture are the most prominent sectors seeing an increase in job postings. Furthermore, 49% of respondents are temporarily or permanently laid off, and 16% have had their hours reduced.

Job seeker's current job status: A large proportion of respondents are currently working in a clerical/administrative or a healthcare role, and 86% of them are making less than $35 an hour.

Job seekers view the job market: If respondents could work in any industry, 24% are not sure where they would like to work, but 25% would choose healthcare and social assistance, and 8% would choose agriculture. When looking at job seekers' view of the job market, respondents often feel there are relevant educational programming and poor or fair jobs that match their skillset and opportunities to enhance their skill set.

Job seekers view the job search support system: Jobseeker respondents primarily use online job boards such as indeed and Workopolis and social media for their job search. A large proportion of them use job description information/occupational and skill profiles and wage rates and benefits to find relevant labour market information and do not work with an employment service organization.

Job seekers view on skills, training, and local support: A large portion of job seeker respondents feel access to opportunities and skills training would help them achieve their full employment potential. They also feel on the job training, and certification would enhance their employability.

Key changes and themes between the first and second phase Job Seeker Survey

Profile of Job Seekers: The first report included 56 respondents, while this second report has a much larger sample size of 215 respondents. There was a noticeable increase in the proportion of respondents aged 55+ who made up 8% in report one and 17% in report two. On the other hand, there was a decrease in respondents aged 35-44 who made up 34% of respondents in the first phase and 21% in the second phase. There was also a proportionality higher number of respondents with a university degree (40%) in phase 1 compared to phase 2 (26%).

Employment Characteristics of Job Seekers: While 73% of respondents were employed in the first phase, less than half (47%) were employed in the second phase. Despite this significant difference in current employment, 75% are seeking new/additional employment in phase 2, which is only 4% higher than the 71% of respondents in phase 1. On the other hand, 53% of respondents are considering moving out of the Southwest Alberta Region to secure employment in report two relative to 44% of respondents in the first report. There is also a more substantial proportion of respondents that have been seeking work over the last 3-6 months in report two at 35%, then report one at 23% of respondents. This may be derived from the shutdown of many parts of the economy in March 2020 due to COVID-19.

Job seeker's current job status: Between reports one and two, management and sales/service was replaced by clerical/administrative and healthcare in the top proportions of sectors that best-classified respondents' current/most recent job. Both clerical/administrative and healthcare rose from 8% of respondents to 13% between reports one and two. It is also noteworthy that the proportion of respondents making over $35/hour dropped from 25% in report one to 14% in report two.

Job seeker's view of the job market: The top four industries of preference have not changed between reports one and two, but it is notable that the number of respondents preferring health care and risen from 22% to 25%. Job seekers' view of the job market is very similar between reports. Still, it is noted that in report two, a higher proportion of job seekers rated poor or fair to Southwest Alberta's ability to provide relevant educational programming, employment assistance, opportunities to enhance their skill sets, and adequately paying jobs by differing degrees. Wage rates and benefits and interesting/fulfilling work were the most mentioned attributes when deciding on pursuing a job among respondents in both reports. There is also a higher proportion of respondents in report two that feel a lack of skills/knowledge and a lack of related work experience were factors hindering them from getting a job/a better job. 62% in report two felt a lack of skills/knowledge was a factor relative to 38% in report one 62% in report two felt a lack of related work experience was a factor relative to 48% in report one

Job seekers view the job search support system: In both phases, job seekers primarily use online job boards such as indeed and Workopolis for their job search and rely on job description information and employer websites to decide on their career paths. In both reports majority of respondents stated they do not work with an employment service organization.

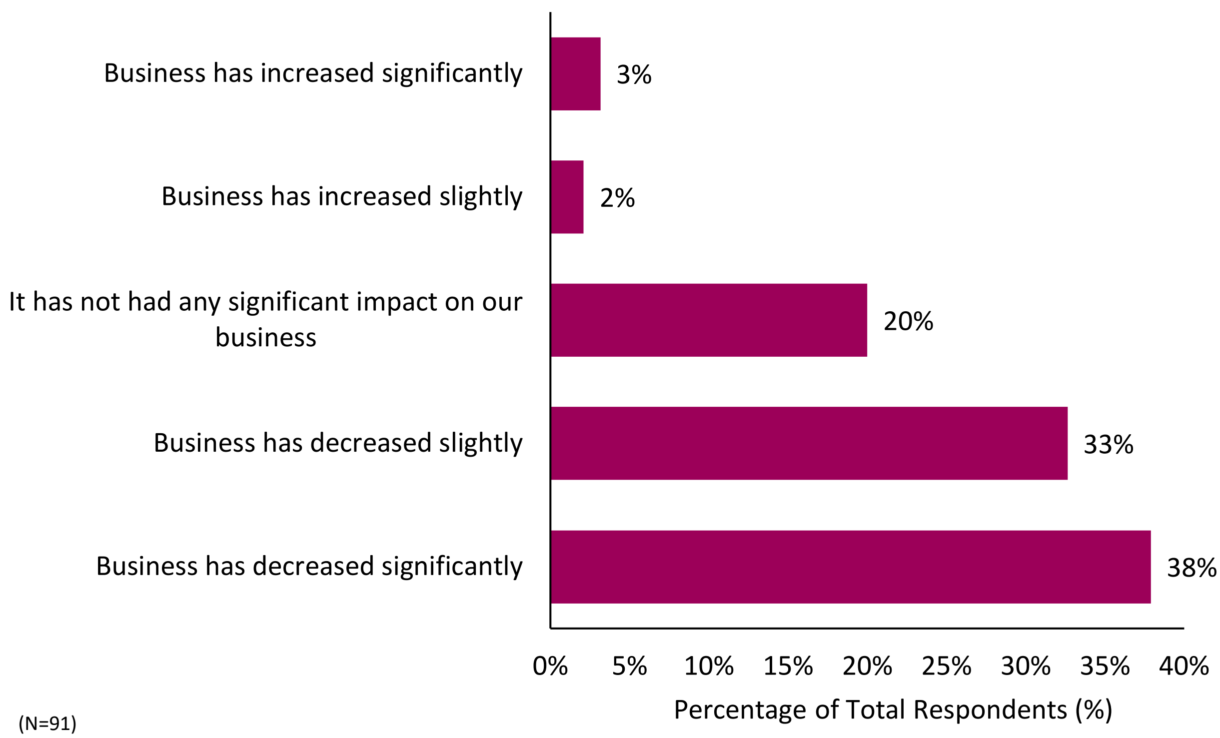
Job seeker's view on skills, training, and local support: In both phases, a large portion of job seeker respondents felt access to opportunities would help them achieve their full employment potential. In addition to this, respondents in report one also emphasized employment counselling. In phase 2, they emphasized skills training. In both reports, respondents felt on the job training and formal training (professional designation or a certification) would enhance their employability.

Second Phase Local Employer Survey Detailed Analysis

Impact of COVID-19

Businesses were asked to provide feedback on the extent to which the recent COVID-19 virus had impacted the health of their business (Figure 1). Based on the survey findings, nearly two-fifths (38%) of respondents indicated that businesses had decreased significantly, and a further 33% that there had been a slight decrease in business activity. Only 20% of respondents indicated there had not been a significant impact, and less than 6% that business activity had increased.

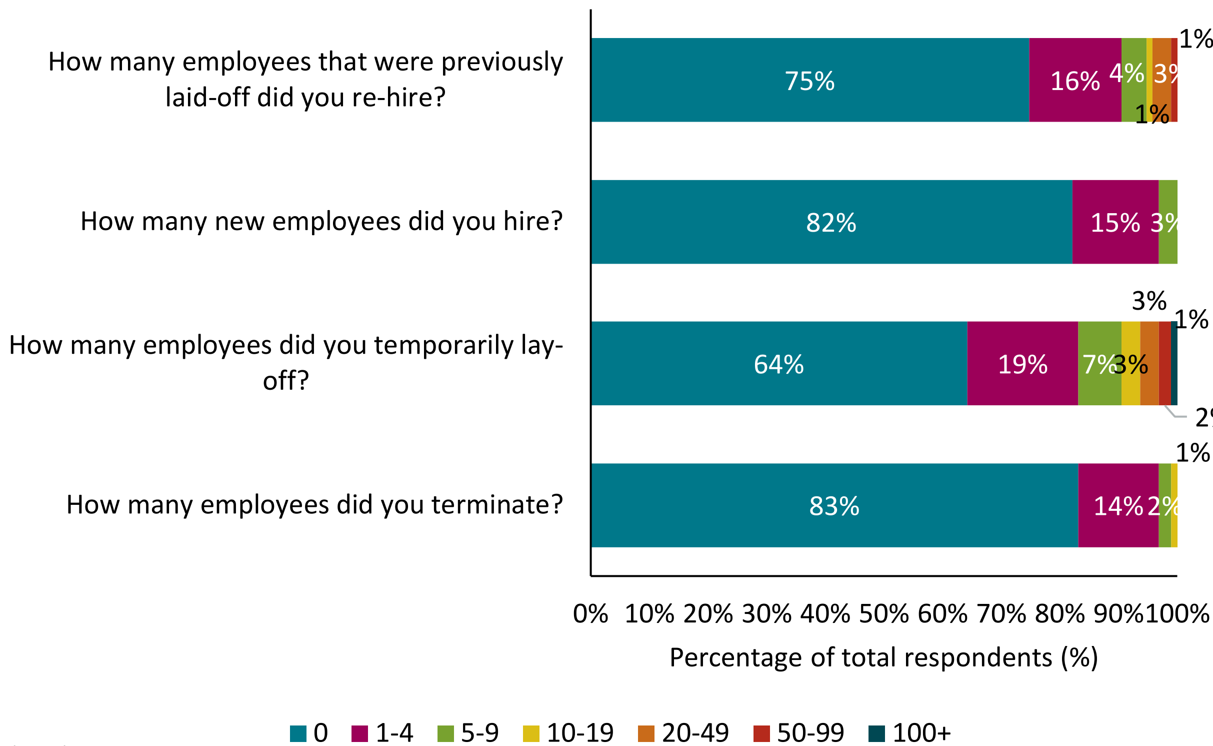
Figure 1: Please indicate which of the following best describes the extent to which the COVID-19 virus has had an impact on the health of your business?



(N=91)

Respondents were then asked several questions related to staffing during COVID-19. When asked how many employees they terminated during COVID-19, 83% of respondents indicated 0, with only 16% terminating between 1-9 employees. Respondents asked to indicate how many employees were temporarily laid off during the pandemic, with 64% stating they did not lay anyone off and 26% between 1 to 9 employees. Overall, the majority of respondents did not hire new employees during the crisis (82%), and if they did, it was between 1- 4 employees (15% of respondents). On a positive note, 20% of respondents indicated that they re-hired between 1-9 employees who were previously laid-off and 4% that they re-hired between 10-99 employees.

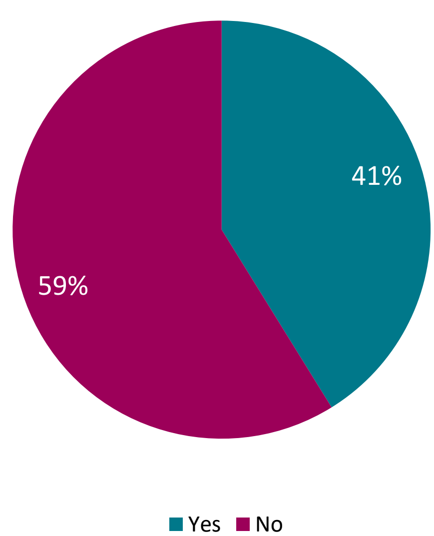
Figure 2: As a result of COVID 19, please respond to the following staffing questions:



(N=95)

Out of the 17 employers that hired during COVID-19, 59% of them felt that the new employees brought a different skill set to their workplace.

Figure 3: Did the new employees you hired bring a different skill set to your workplace?



(N=17)

The respondents listed the types of measures that they had taken in response to COVID-19. The most common included limiting employee travel (37% of responses), shortening the hours of operation (33%), and requiring employees to work from home (24%). Key themes identified in the 'other' response category (35% of responses) were incorporating new sanitary measures at work, updating the workplace safety and training policies, and limiting client interaction where possible. Only 15% of respondents noted that they had not taken any measures, and it was business as usual.

Figure 4: Which of the following measures have you taken in response to COVID-19?

Response	Frequency	Percent
We have limited employee travel	35	37%
We have shortened our hours of operation	31	33%
We now require employees to work from home	23	24%
We have supported staff to complete professional development	23	24%
We have had to take on additional liabilities (loan, capital injection)	22	23%
We have temporarily closed our business	15	16%
Business as usual, no measures taken	14	15%
We have extended our hours of operation	4	4%
Other	33	35%
Total Respondents	**95**	**100%**

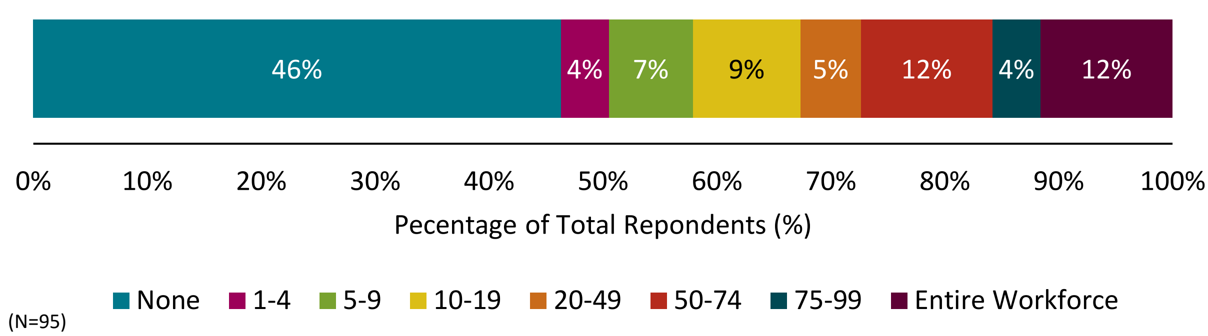
Respondents also listed their outlook if the current COVID-19 situation continues or worsens in the next 90 days. The majority of responses were that they would continue as business as usual (47%), with 22% stating they would have to lay off staff. Only 4% of respondents mentioned that they would need to permanently close their business, and 12% that they would need a temporary business closure. Notable responses within the 'other' category stated that their outlook would depend on further action taken by the Government (e.g., the continuation of the wage subsidy program) and reinstating working from home practices if the situation worsens.

Figure 5: If the current situation either continues or worsens, what is your outlook for the next 90 days?

Response	Frequency	Percent
Business as usual	45	47%
We will need to lay off staff	21	22%
We will need to take out a loan to keep operating	16	17%
We will need to shorten our hours of operation	17	18%
We will need to close our business temporarily	11	12%
We will need to close our business permanently	4	4%
Other	12	13%
Total Respondents	**95**	**100%**

In Figure 6, respondents were asked to indicate the proportion (%) of their workforce that can work remotely. The results indicate that nearly half (46%) of the workforces surveyed can not work remotely, and a further 26% of respondents indicating that 1 to 49 percent of their workforce could perform their job from home. Overall, only 12% of respondents felt that their entire workforce could work remotely.

Figure 6: What proportion of your workforce is able to perform their job, working remotely from home?



Businesses surveyed were also asked to indicate which out of a list of activities (Figure 7) they had undertaken during the pandemic. 38% of respondents mentioned that they had considered committing to future investment in skill development for staff, and 35% that they had re-evaluated the skill required to support their future business operations. Conversely, only 20% of businesses mentioned that had invested in skill development for staff and 8% that they had accessed funding to support skill development. It is important to note that the majority of responses within the 'other' category stated that they had done nothing regarding skill development or that the actions they had taken were not listed in the figure below.

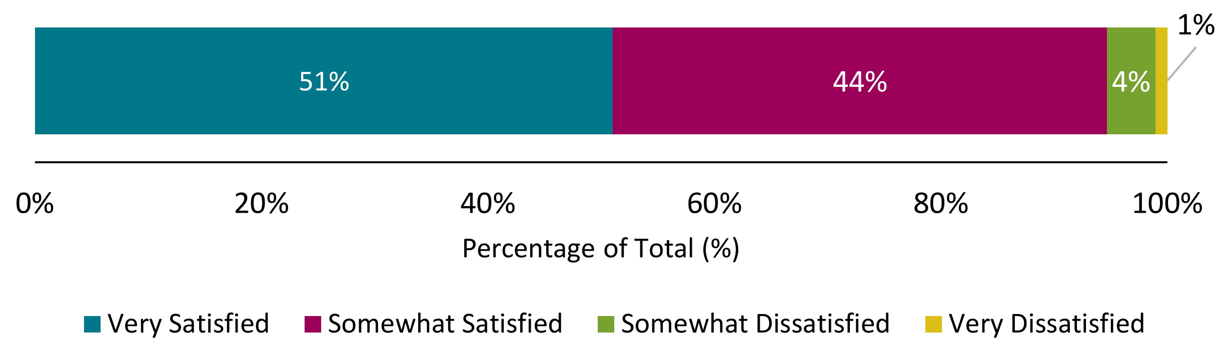
Figure 7: Have you undertaken any of the following activities during COVID-19?

Response	Frequency	Percent
Considered committing to future investment in skills development for staff	36	38%
A re-evaluation of the skills required to support future operations	33	35%
Committed to future investment in skills development for staff	29	31%
Identified skills gaps in your current workforce	28	29%
A re-evaluation of the skills required to support current operations	27	28%
Invested in skills development for my staff	19	20%
Accessed funding to support skills development	8	8%
Other	44	46%
Total Respondents surveyed	**95**	**100%**

General Survey Findings

As can be seen in Figure 8, nearly all of the respondents (95%) were either very satisfied for somewhat satisfied operating a business in the Southwest Alberta region. This 'top 2-box' ranking increased from the Southwest Business Survey before COVID-19 in March 2020, where 91% of businesses surveyed indicated that they were very or somewhat satisfied operating a business in the region.

Figure 8: Overall, how satisfied are you with operating a business in the Southwest Alberta region?

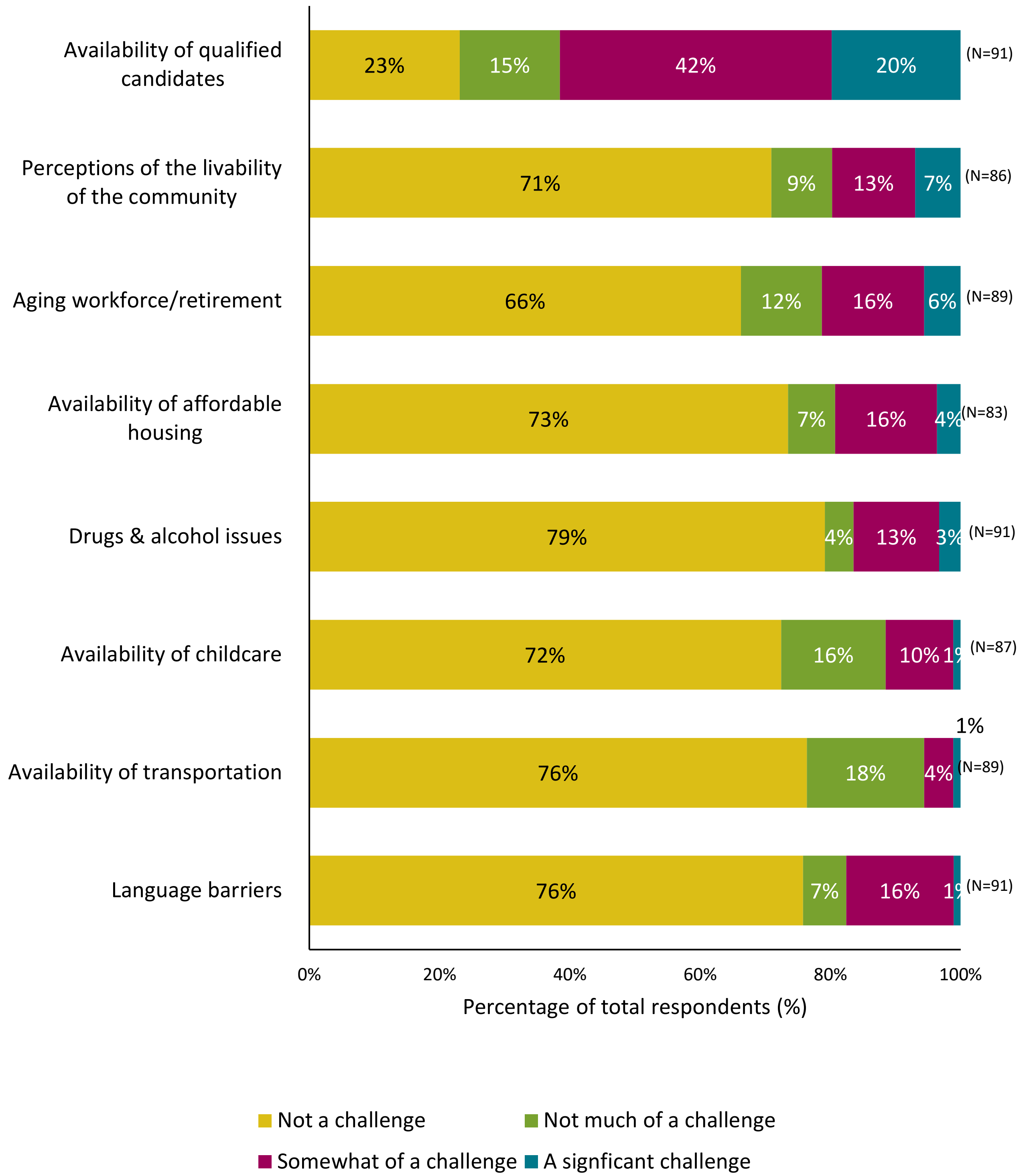


(N=95)

Figure 9 provides an overview of the respondent's opinions regarding recruiting, hiring, and retaining employees before the pandemic. Based on the findings, 62% of employers had either a significant challenge or somewhat of a challenge with the availability of qualified candidates, followed by an ageing workforce/retirement at 22% of total respondents. The perception of the liveability of the community and availability of affordable housing were other challenging factors for many employers, with a combined 20% of respondents respectively stating it was a significant or somewhat of a challenge. Conversely, employers had the least challenge with drug and alcohol issues (79%), the availability of transportation (76%). Note, respondents that indicated 'don't know' have been removed from the sample size for this question.

Compared to the Employer Survey completed in March 2020, businesses in June 2020 were much more likely to rate the potential challenges in Figure 9 as not a challenge. While this may seem counter-intuitive given the difficult economy compared to the pre-COVID times, it is possible that the listed issues were less of a concern due to the growing relative concern surrounding other issues (such as emergency closures and switching to electronic sales/communication). Comparing the relative positions of the factors, drug and alcohol problems moved down the list as a relative concern, and the availability of affordable housing moved up the list.

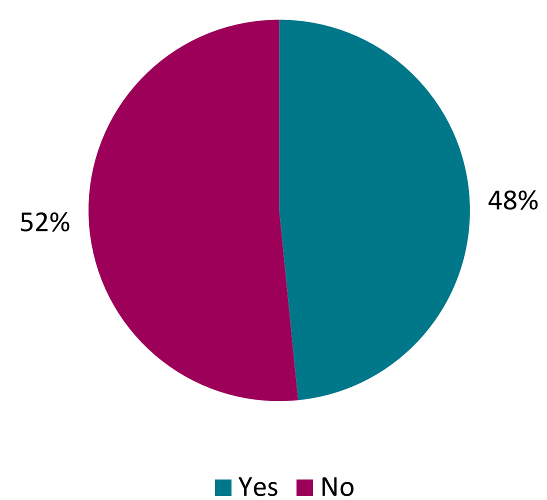
Figure 9: Thinking pre-COVID 19, to what extent was each of the following a challenge when recruiting, hiring, and retaining employees in your organization?



Other Key Questions

When asked about their hiring intentions for the next 12 months, 48% answered that they were intending to hire new staff. This metric had decreased from the March 2020 Employer survey, where 52% had responded that they intended to hire new employees in the next 12 months.

Figure 10: Are you planning to hire new employees in the next 12 months? (this does not include re-hiring those that may have been laid off due to COVID 19)



(N=95)

Of those 46 respondents who indicated that they were planning to hire staff in the next 12 months, the top three occupations that were mentioned included skilled trade (28% of mentions), sales/service (26% of mentions) and clerical/administrative (17% of mentions). Conversely, engineering (including Civil, Mechanical, Electrical & Chemical) and other professional occupations were the occupations that employees mentioned least. Of those 8% respondents that mentioned other, the most common responses were for truck drivers and general labourers.

Compared to the March 2020 Employer Survey, cashier/helper/labourer had decreased in relative mentions from 30% of respondents mentioning this occupation in March, to 17% of respondents mentioning this in the current survey. Meanwhile, the relative proportion of businesses mentioning that they expect to hire skilled trades had increase from 23% in March to 28% in June.

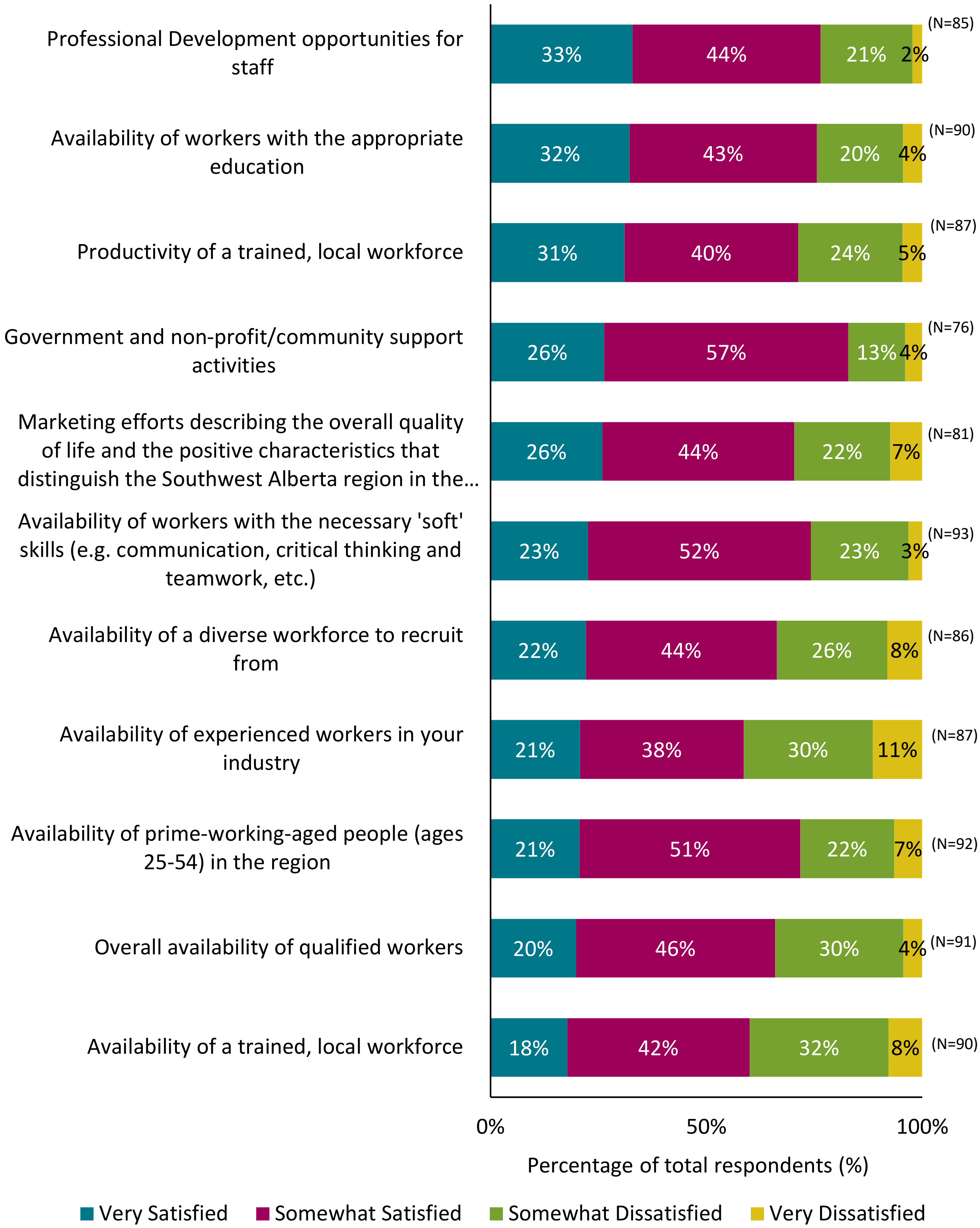
Figure 11: Which occupations/positions do you expect you will most likely require?

Response	Frequency	Percent
Skilled Trade	13	28%
Sales/ Service	12	26%
Clerical/ Administrative	8	17%
Cashier/ Helper/ Labourer	8	17%
Management	6	13%
Other Technical	5	11%
Machine Operator/ Assembly	5	11%
Computer & Information Systems Professionals (incl. software developers, database management, and information systems	4	9%
Engineering (incl. Civil, Mechanical, Electrical, & Chemical)	1	2%
Other Professional	1	2%
Other	8	17%
Total	**46**	**100%**

For Figure 12, respondents were asked to indicate their level of satisfaction for a number of factors. Based on the findings, businesses were 'most satisfied' with the number of professional development opportunities for staff (33%), followed by the availability of workers with the appropriate education (32% and the productivity of a trained local workforce (31%). Furthermore, when 'very satisfied' and 'somewhat satisfied' responses are combined the leading factors were government and non-profit/community support activities (combined 83%) and the availability of workers with the necessary 'soft' skills (e.g., communication, critical thinking, and teamwork, etc.) (combined 75%). On the flip side, respondents were 'most dissatisfied' the availability of experienced workers in their industry (11%) and the availability of a diverse workforce to recruit from (8%). Note respondents that stated 'don't know' were removed from the sample size.

The level of satisfaction tended to increase between the March and June surveys across the various the workforce factors. The proportion of businesses rating themselves as very or somewhat satisfied with the Government and non-profit/community support activities showed a notably large increase from 62% to 83%. The same top-2-box metric for availability of workers with the necessary 'soft' skills (e.g. communication, critical thinking and teamwork, etc.) also increased substantially from 61% in March to 74% in June.

Figure 12: For each of the following statements, please indicate your level of satisfaction



Each of the workforce factors in the table above was analyzed using their relationship with each businesses response to the Key Performance Indicator question - "Overall how satisfied are you with operating a business in the Southwest Alberta region?". MDB Insight's measure of derived importance (shown in Figure 13) demonstrates the degree to which each factor is related to Overall Satisfaction in the area. Together, alongside the level of performance on each factor (the proportion of businesses rating themselves very or somewhat satisfied), the priority ranking is created. Factors with a high priority ranking tend to have high importance and relatively low performance.

In Southwest Alberta, the highest priority workforce factors were the Availability of experienced workers in your industry, Availability of a trained, local workforce, and Marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace. The factors with a high priority rank in Figure 13 represent potential avenues for improvement, as these factors are important to businesses and have room for improvement.

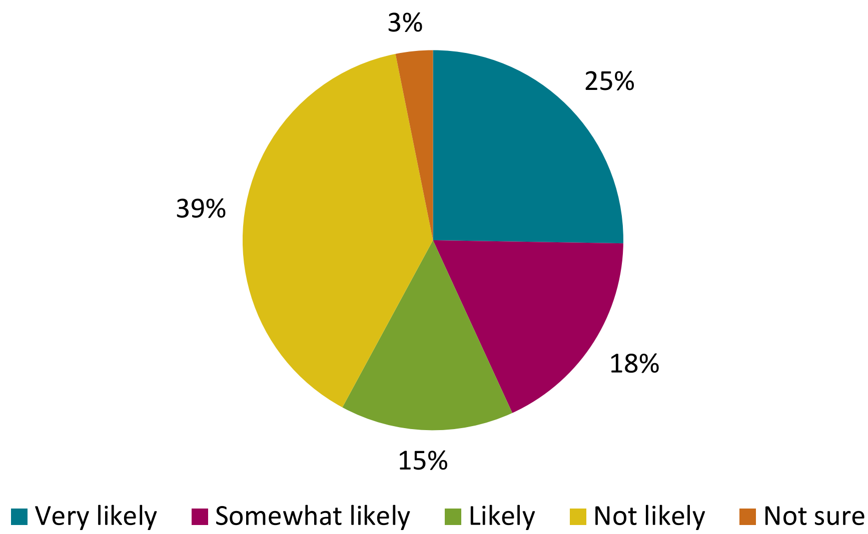
Compared to the March survey, while the relative priority levels of most of the factors remained similar, there were some notable changes. Government and non-profit/community support activities moved lower in the priority ranking, primarily due to the increase in performance ratings of this factor. The factor, "marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace" had moved up in priority ranking, due to both an increase in the level of importance of this factor, as well as a relatively small increase in performance compared to the other factors. This latter point may be a function of the difficulties experienced by the tourism industry during COVID-19. Further, the productivity of a trained, local workforce had also moved up in priority ranking. The level of importance attributed to this factor had increased substantially, which may be attributable to the difficulties of businesses keeping their workforce productive during times of physical restrictions and virtual communications.

Figure 13: Priority matrix depicting the relative priority of workforce issues in Southwest Alberta

Factor	Level of Importance	Performance	Priority Rank
Availability of experienced workers in your industry	7.4	59%	1
Availability of a trained, local workforce	6.6	60%	2
Marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace	8.8	70%	3
Productivity of a trained, local workforce	8.5	71%	4
Overall availability of qualified workers	7.1	66%	5
Availability of a diverse workforce to recruit from	6.5	66%	6
Availability of prime-working-aged people (ages 25-54) in the region	7.0	72%	7
Availability of workers with the appropriate education	7.7	76%	8
Professional Development opportunities for staff	8.0	76%	9
Availability of workers with the necessary 'soft' skills (e.g., communication, critical thinking, and teamwork, etc.)	6.8	74%	10
Government and non-profit/community support activities	7.1	83%	11

When businesses were asked if difficulties with labour retention would impact their decision to remain operating in the region (Figure 13), 57% of respondents stated 'very likely' or 'somewhat likely.' This number had increased from 46% in the March survey.

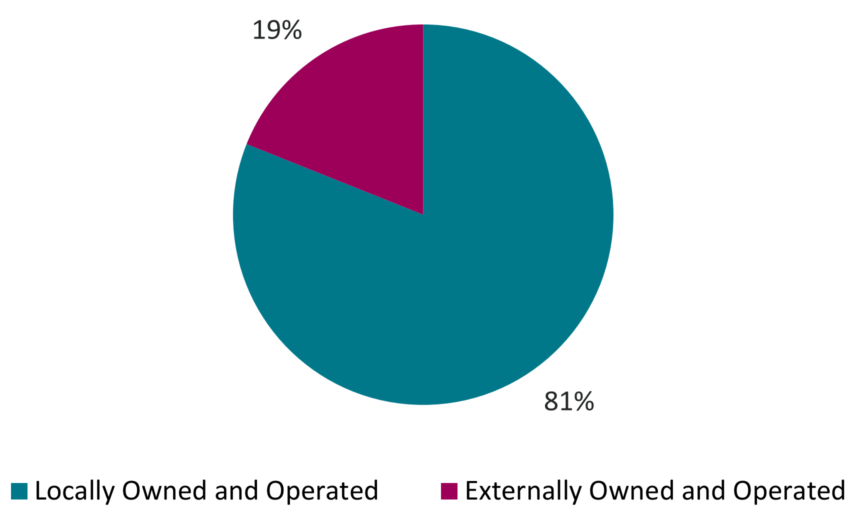
Figure 14: How likely are difficulties with skilled labour retention or recruitment to influence your decision to remain operating your organization in the Southwest Alberta region?



(N=95)

When asked how to best describe their organization (Figure 14), 81% of respondents stated that they were locally owned and operated.

Figure 15: Which of the following best describes your organization?



(N=95)

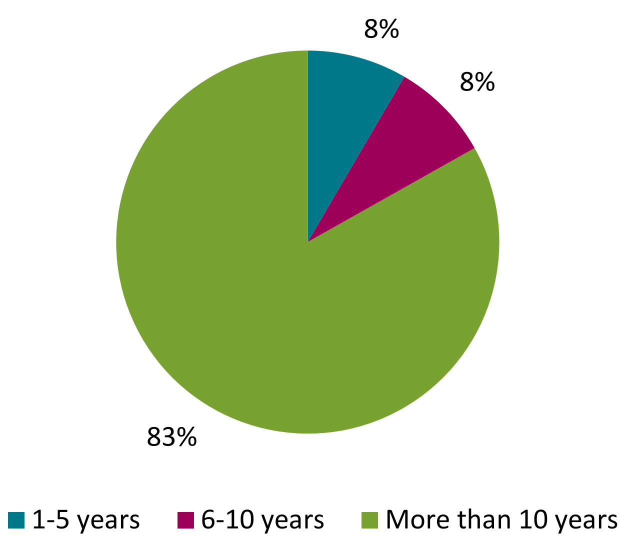
The majority of respondents mentioned that their businesses were located in Lethbridge (68%), followed by Taber (12%) (Figure 15). The top locations mentioned within the 'other' category (27%) included Picture Butte and Calgary.

Figure 16: In what communities is your organization located?

Response	Frequency	Percent
Lethbridge	65	68%
Taber	11	12%
Cardston	3	3%
Vulcan County	2	2%
Town of Vulcan	2	2%
Fort Macleod	2	2%
Other	26	27%
Total	**95**	**100%**

When asked how long their business had operated in the region (Figure 16), the majority of respondents stated for more than 10 years (83%).

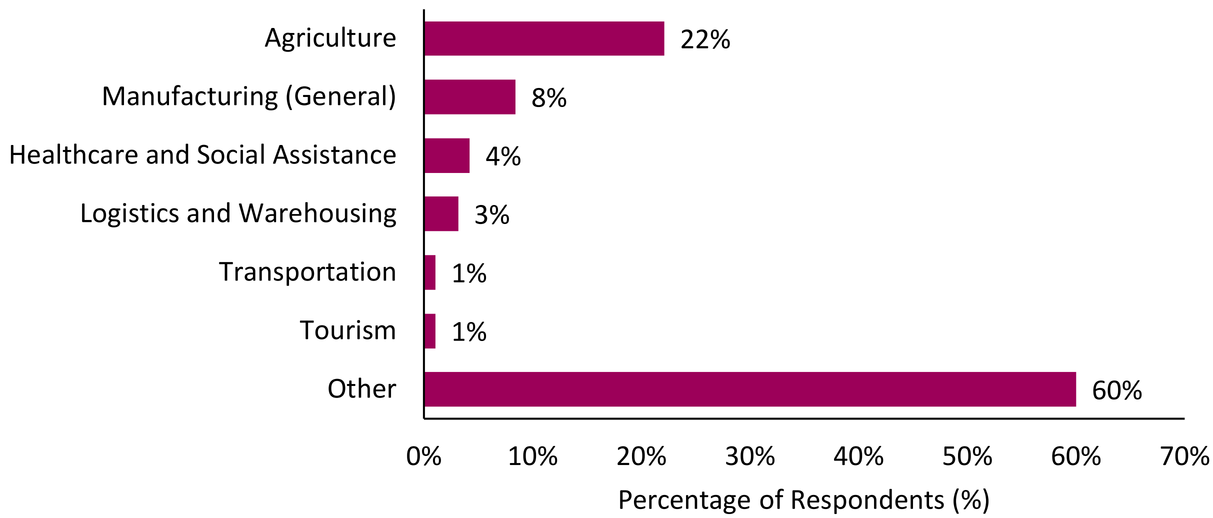
Figure 17: How many years has your organization operated in the region?



(N=95)

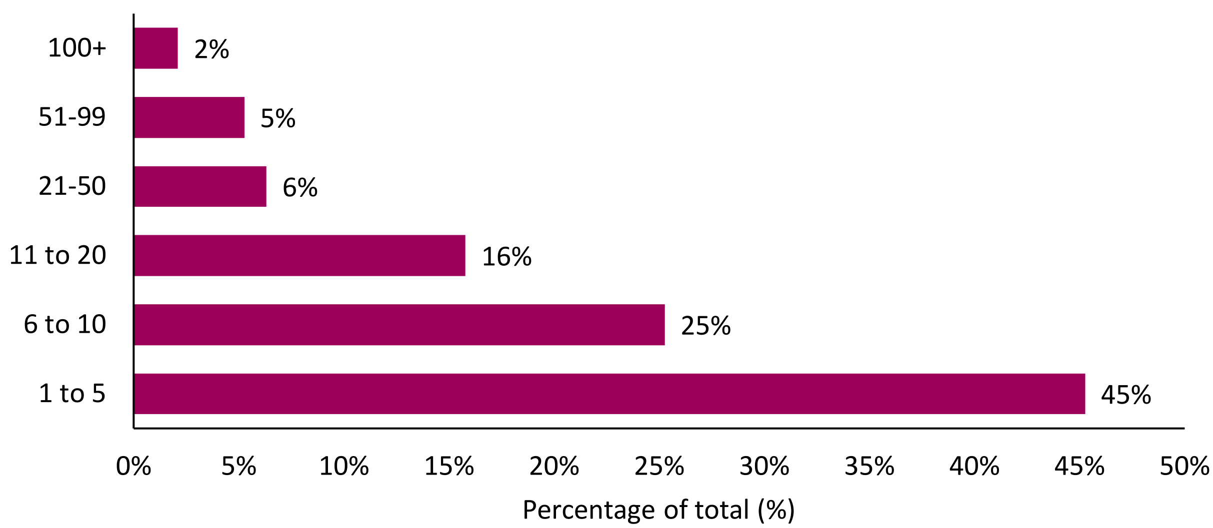
Figure 18 shows the breakdown of respondents but their businesses primary activity. 22% of respondents stated they were within the agriculture sector, followed by manufacturing (general) (8%) and healthcare and social assistance (4%). The top sectors noted within the 'other' category included construction, retail, and professional services (e.g. consultants).

Figure 18: Which of the following industries best describes your organization's primary activities?



Most businesses surveyed had between 1 to 10 people (70% of respondents) and less than 7% indicated that they had more than 51 full-time employees (Figure 18).

Figure 19: Including yourself, how many full-time employees (30 hours or more) do you employ whose primary place of work is in the Southwest Alberta region?



Second Phase Job Seeker Survey Detailed Analysis

Sample Employment Characteristics

Figure 20: Are you currently employed?

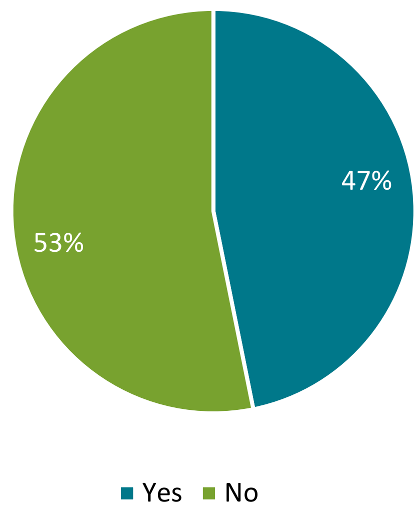


Figure 21: Are you seeking new/additional employment?

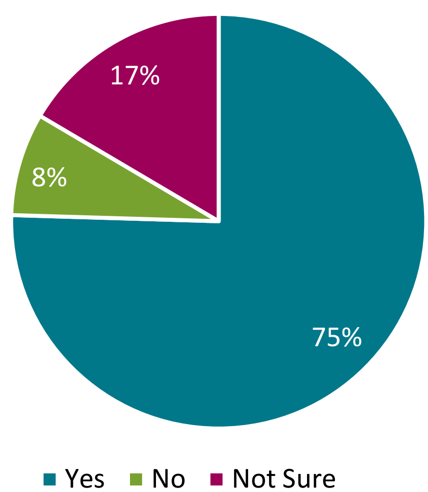


Figure 22: Do you consider yourself to be under-employed?

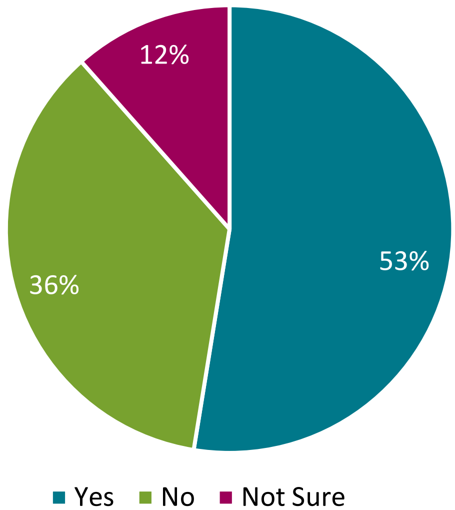


Figure 23: How long have you been actively seeking employment?

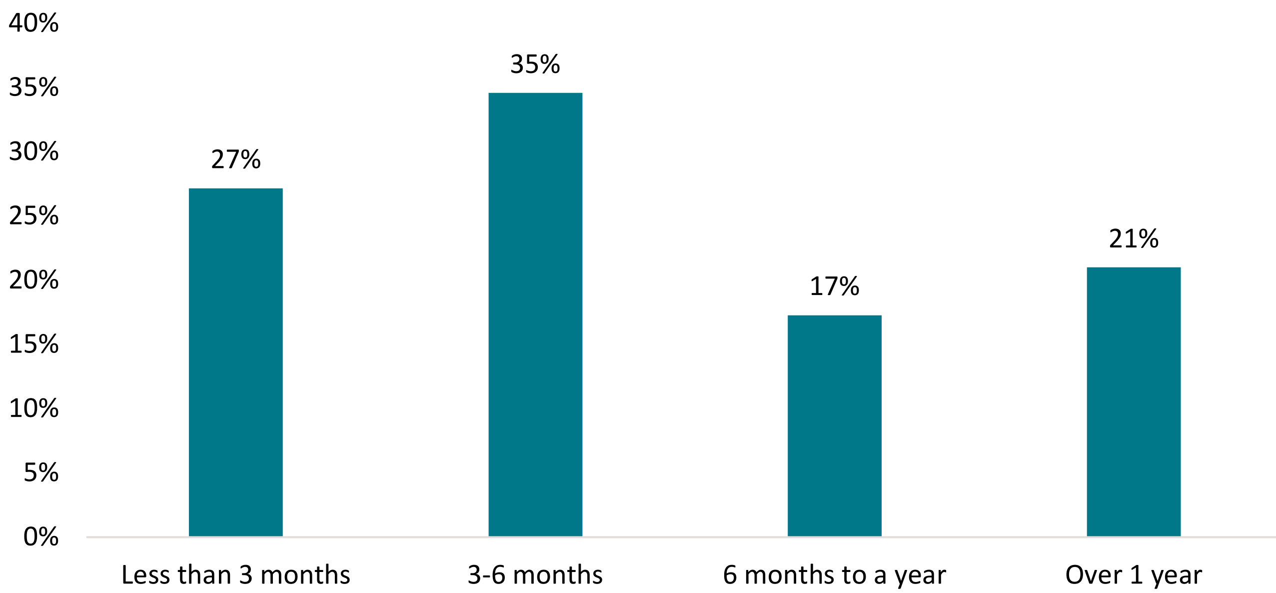


Figure 24: Would you consider moving out of the Southwest Alberta Region to secure employment?

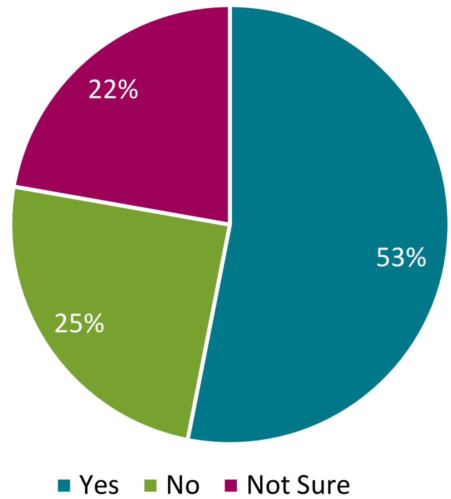
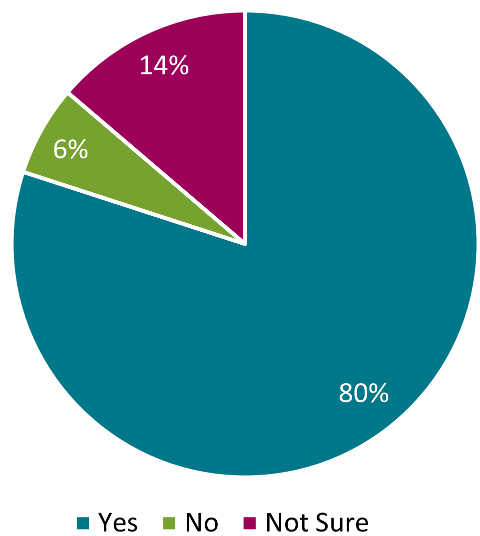


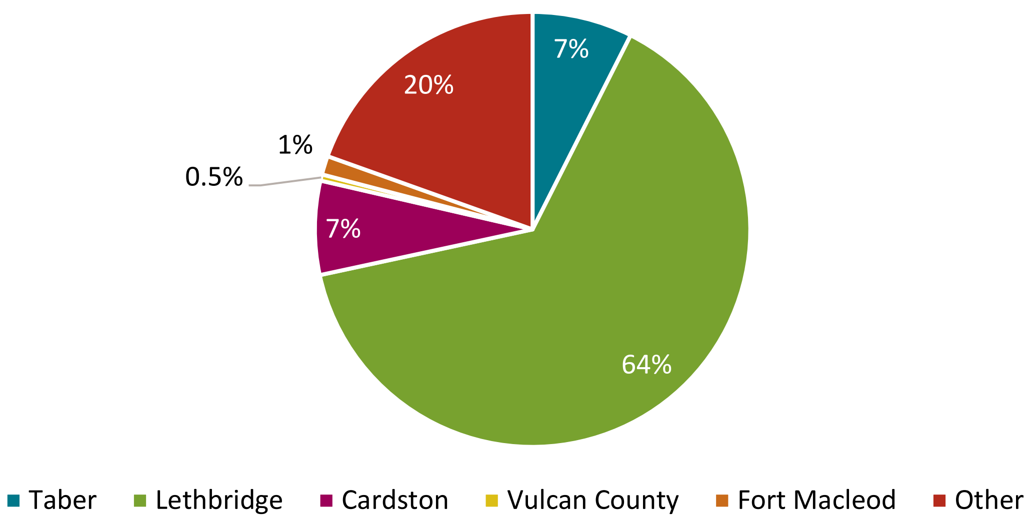
Figure 25: Would you consider retraining to be better prepared for local employment opportunities?



Residence of Respondents in the Southwest Alberta Region

64% of respondents reside in Lethbridge and, 7% are from Cardston, 7% are from Taber, 1% are from For Macleod, 0.5% are from Vulcan County, and 20% of respondents are in other regions such as Pincher Creek, High River, Coaldale and Crowns Pass

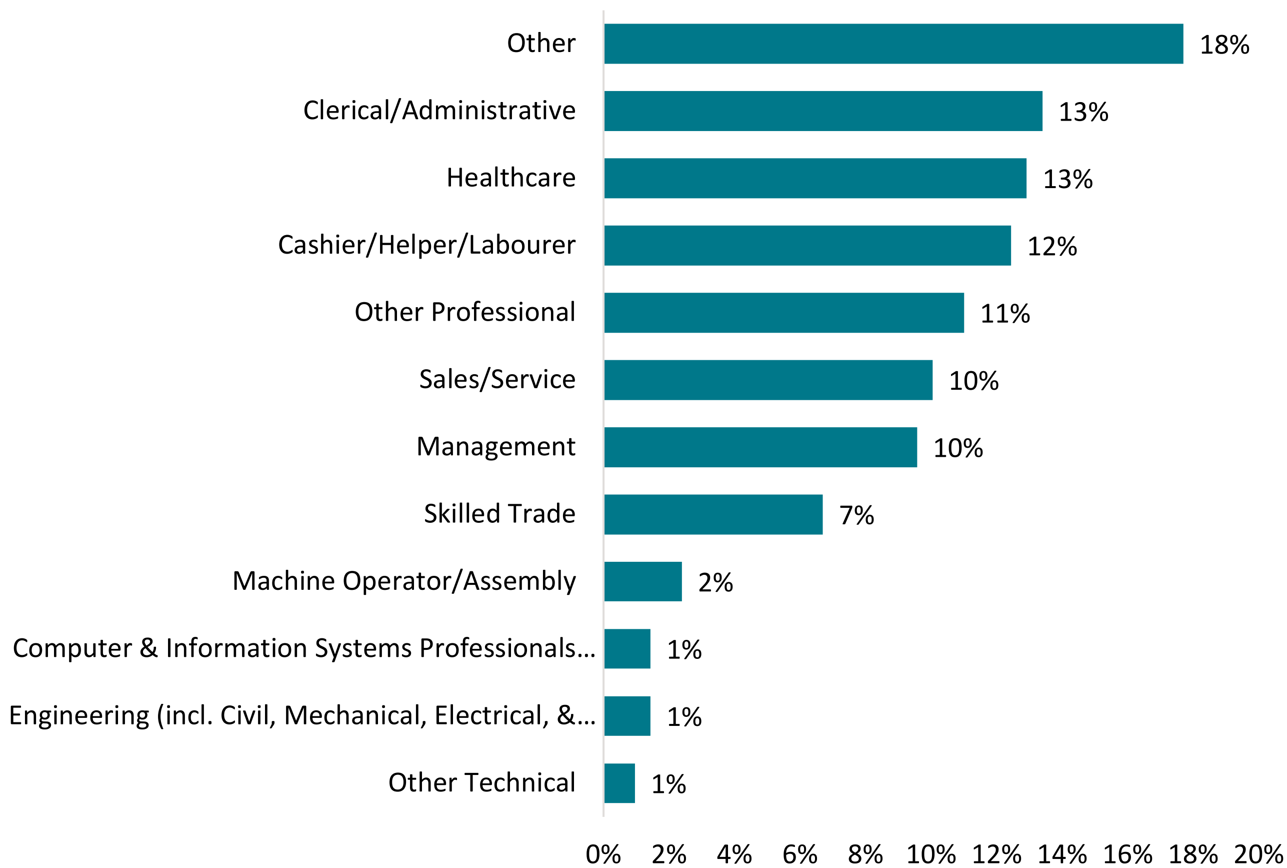
Figure 26: Where in the Southwest Alberta Region do you currently live?



Classifications of Current Job

When asked about their current jobs, the top three classifications after "other" (18%) were clerical/administrative roles at 13%, healthcare at 13%, and cashier/helper/labourer at 12%. Other classifications included childcare, journalist, education, and animal care.

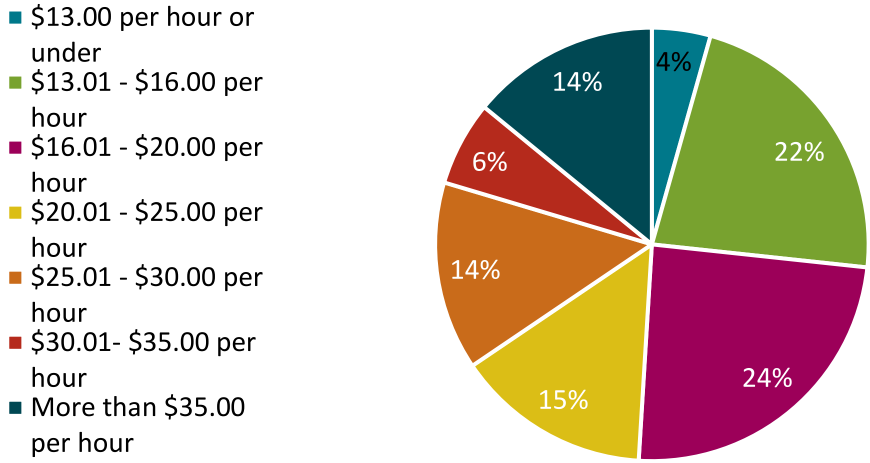
Figure 27: Which of the following best classifies your current/most recent job?



Average Hourly Wage in Current Job

When asked what the average hourly wage that respondents were receiving at the time of survey or in their most recent job, 53% of respondents stated they are making between $16.01-$35.00 per hour. 22% stated $13.01-$16.00, 4% stated $13.00 or less and 14% of respondents stated over $35/hour.

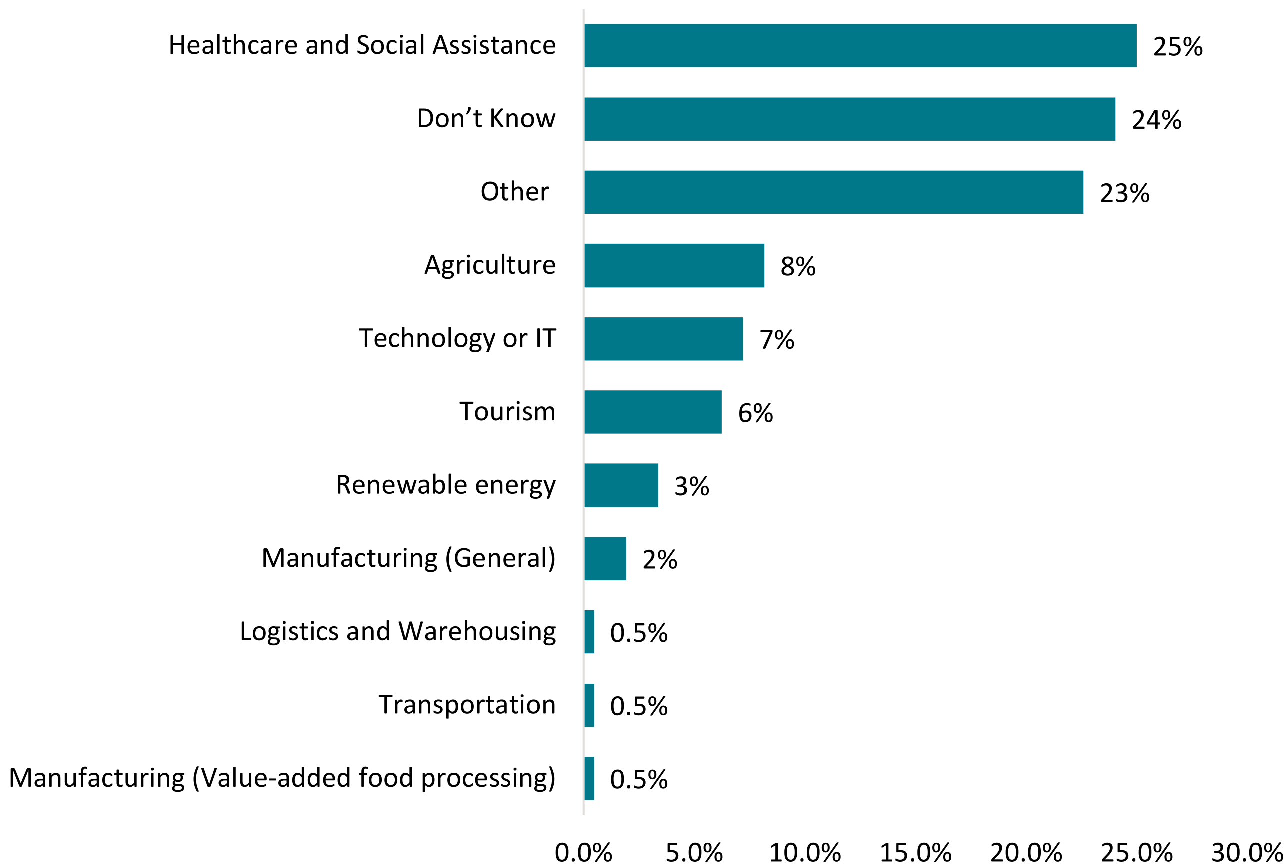
Figure 28: What is the average hourly wage (excluding benefits) you earn in your current job?



Industry of Preference

When asked what industries respondents would prefer to work in, the highest proportion of respondents (25%) mentioned the healthcare and social assistance industry, and 24% of respondents did not know. Other industries commonly mentioned include childcare, arts and culture, and hospitality.

Figure 29: In what industry would you prefer to work?



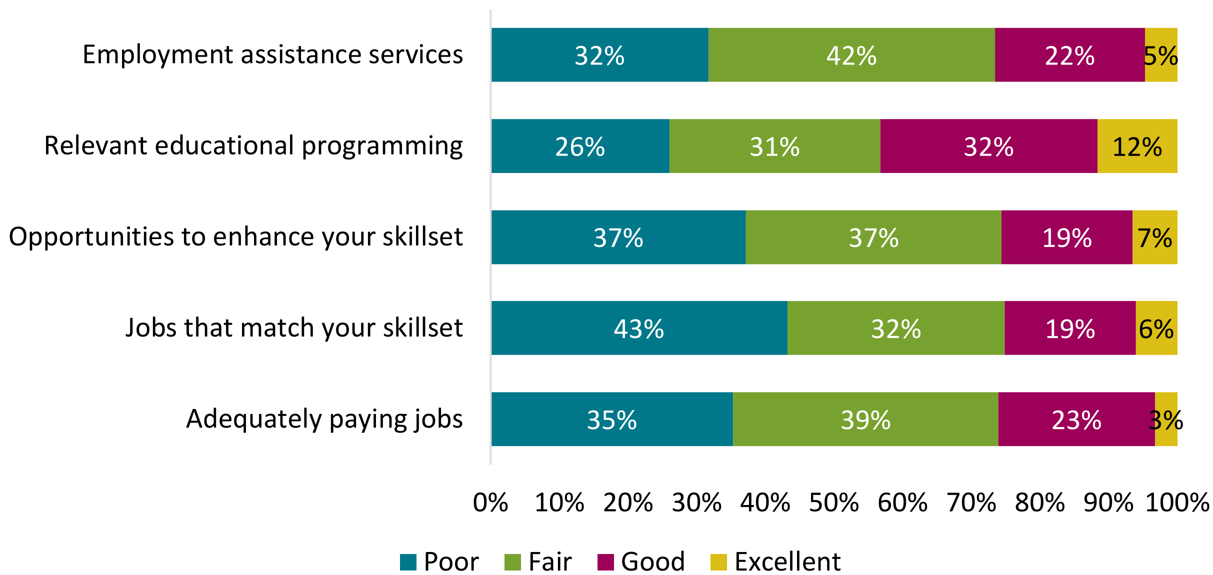
Ideal Job Based on Qualifications

When respondents were asked to think about future employment and their ideal job based on current qualifications, the most common responses were occupations such as management, healthcare worker, accounting and roles in the trades.

Rating of Employment Assets in The Region

When asked to rate the employment assets in the region, individuals rated the employment assistance services moderately, with 64% of respondents indicating these were good or fair. 44% of respondents rated the educational programming good or excellent on the other hand, 74% of respondents feel there are poor or fair opportunities to enhance their skill set, and 75% feel there are poor or fair jobs that match their skillset. 74% of respondents rated poor or fair, for adequately paying jobs.

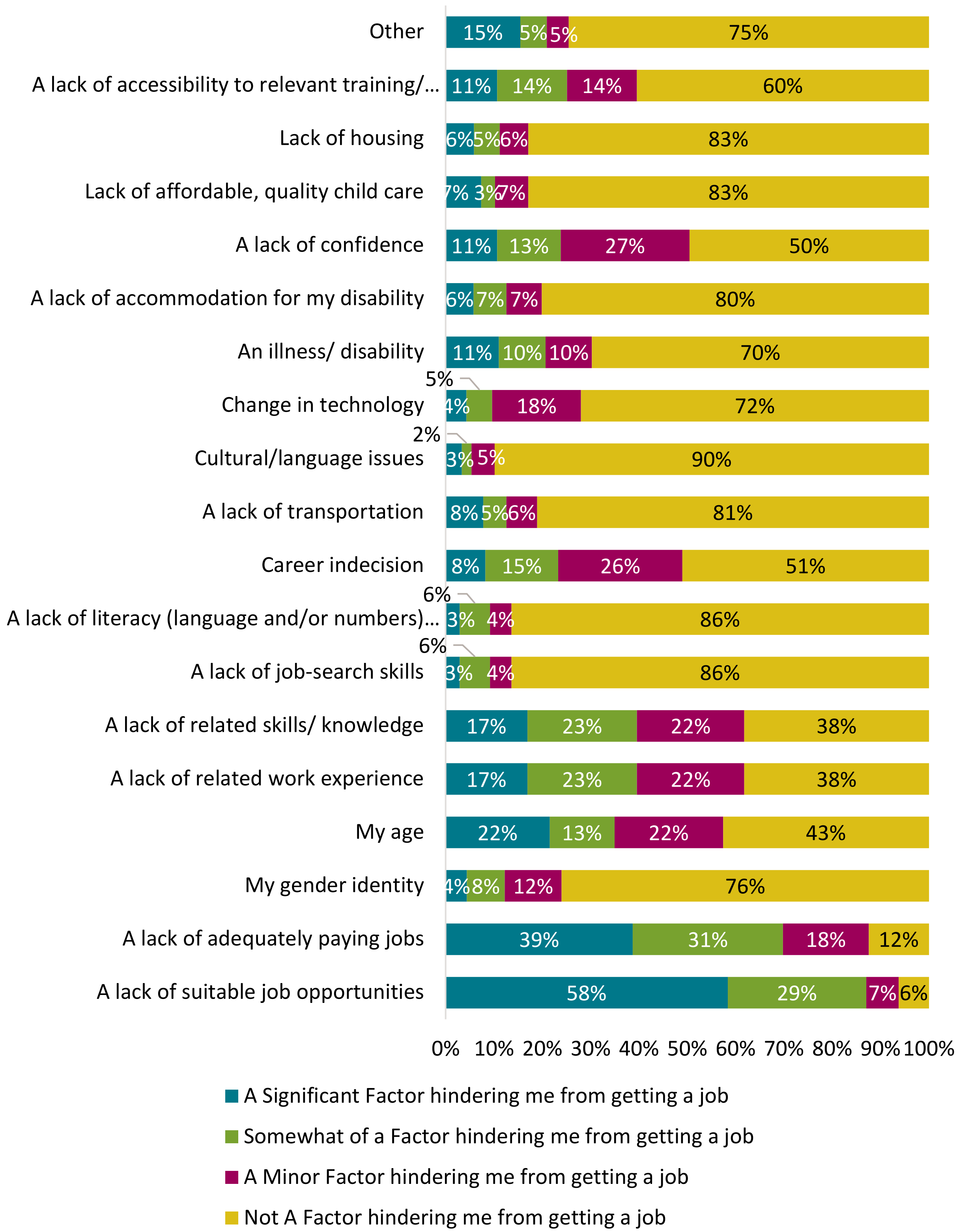
Figure 30: Please rate the Southwest Alberta region's availability of…



Factors Hindering the Ability to Get a Job

When asked what factors are hindering the ability to get a job, a lack of adequately paying jobs and lack of suitable job opportunities were the most noteworthy with 70% and 87% of respondents respectively stating these are factors significantly or somewhat hindering their ability to get a job. Other factors that were mentioned include healthcare concerns around hiring new workers, criminal records, and racial bias.

Figure 31: Which factors may be hindering you from getting a job/ a better job?



Methods Used When Looking For a job

Respondents listed the method they use to look for a job. The most commonly listed methods were online job boards, which were mentioned by 82% of respondents, social media at 64% and word of mouth at 54%. Other methods of looking for a job that was mentioned include networking events and handing out resumes.

Figure 32: Which of the following methods have you used when looking for a job?

Mention	Percent
Online job boards (Indeed, Workopolis, etc.)	82%
Social Media (Facebook, Twitter, Linkedin, Kijiji, etc.)	64%
Word of Mouth	54%
Advertising - newspaper	14%
Local Employment Agencies	7%
Other	3%

Valuable Attribute When Making A Decision About Pursuing a Job

Respondents also listed the attributes of a job that they assign the most value when deciding to pursue a job. The most commonly mentioned attributes were wage rates and benefits at 86%, interesting/fulfilling work at 77% and job security, which was mentioned by 71% of respondents.

Figure 33: What is most important to you when making decisions about the jobs you pursue?

Mention	Percent
Wage rates and benefits	86%
Interesting/fulfilling work	77%
Work-life balance	71%
Job security	71%
Flexible hours	51%
Training/advancement opportunities	51%
Company culture	49%
Potential for remote work and work-from-home	27%
Upwards mobility	26%
Ability to participate in innovation/technological advancement	20%
Corporate responsibility	19%

Labour Market Information, Tools or Services Used in The Past to Make Career Decisions

Respondents in the sample also mentioned some labour market information, tools, and services they had used in the past to help decide their career path and choose their current industry. Commonly cited types of information were job description information/occupational and skill profiles (59%), wage rates and benefits (51%), and employer websites (48%).

Figure 34: Which of the following information, tools or services have you used to decide your career path and choose your current industry?

Mention	Percent
Job description information/occupational and skill profiles	59%
Wage rates and benefits	51%
Employer websites	48%
Job/resume banks	39%
Licensing/credential requirements	20%
Availability of workers in the industry	19%
Occupational shortages and surpluses	19%
Employer databases/links	18%
Availability of training institutions for specific occupations	15%
I have never used labour market information, tools or services	15%
Employer recruiting practices	13%
Legal requirements/labour code information	8%
Hiring of special employee groups (e.g. employment equity groups, foreign workers)	6%
Other	4%

Sources Used to Find Relevant Labour Market Information in

The sources respondents used most often to find relevant labour market information were Federal government websites/publications such as business services (42%), provincial government website/publication (39%) and colleagues, which was mentioned by 32% of respondents. Other sources mentioned include job boards, social media websites such as Indeed.

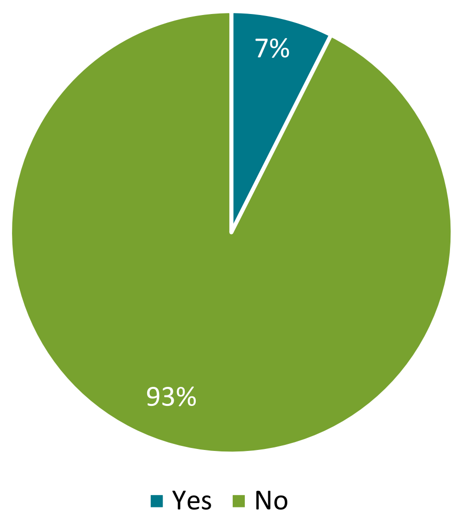
Figure 35: What source(s) do you typically use to find relevant labour market information?

Mention	Percent
Federal government website/publication such as Business Service Centres, JobFutures, HRDC, Industry Canada, Service Cana	42%
Provincial government website/publication	39%
Colleagues	32%
Local employment support organizations	25%
Educational institution	23%
Local business associations	19%
Professional association/union/employee association	14%
Other	7%
Sector Council/Industry association	7%
Private consulting firm	6%

Working with an Employment Service Organization

93% of respondents reported that they were not using an employment services representative.

Figure 36: Are you currently working with an employment service organization to help you conduct your job search?



Assistance Needed to Achieve Full Employment Potential

Respondents in the sample also mentioned the types of assistance that they feel they need to achieve their full employment potential. The majority (60%) of respondents felt they needed more access to opportunities. Other commonly mentioned assistance tools were skills training (36%) career/employment counselling (28%). Respondents who selected the 'other' category mentioned tailored support for individuals with medical disabilities.

Figure 37: What kind of help do you need to achieve the job you want?

Mention	Percent
Access to opportunities	60%
Skills Training	36%
Career/employment counselling	28%
Jobseeker assistance	24%
Retraining programs	24%
None, I don't need any assistance	19%
Access to labour market information	15%
Other	7%

Types of Training That Would Enhance Employability

When asked what types of training respondents would consider enhancing their employability, 'on the job training' was the option selected the most often (55%). A certification (32%) or essential skills (28%) were also commonly mentioned. Post-degree training for job-specific skills was commonly mentioned in the 'other' category.

Figure 38: Which of the following types of training would give you more opportunities?

Mention	Percent
On the job training	55%
Certification	32%
Essential Skills	28%
College Diploma	25%
University Degree	22%
Apprenticeship	19%
Professional Designation	19%
None, I don't need any additional training	15%
Other	6%

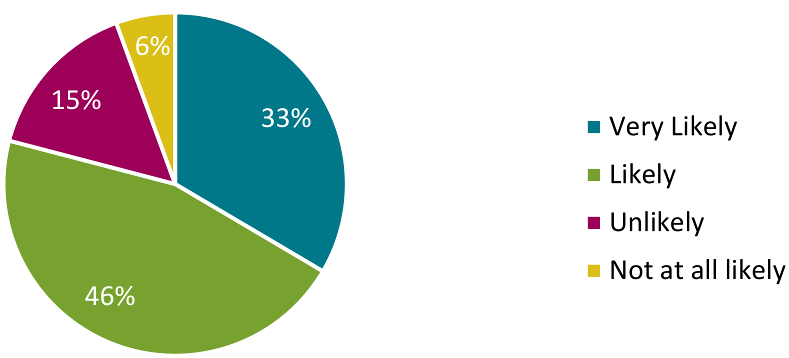
Additional Information Needed to Be Successful in Your Job Search

When respondents were asked what, if any additional information they needed to be successful in their job search, they responded with information on effective networking, education needs and how employers measure candidates when selecting for a role.

Implications of COVID-19

When asked how likely they would consider employment in occupations that they may not have considered in the past, 79% of respondents mentioned they are very likely or likely to make this consideration. On the other hand, 21% stated unlikely or not at all likely.

Figure 39: When you consider employment opportunities post COVID-19, how likely are you to consider employment in occupations that you may not have considered in the past?



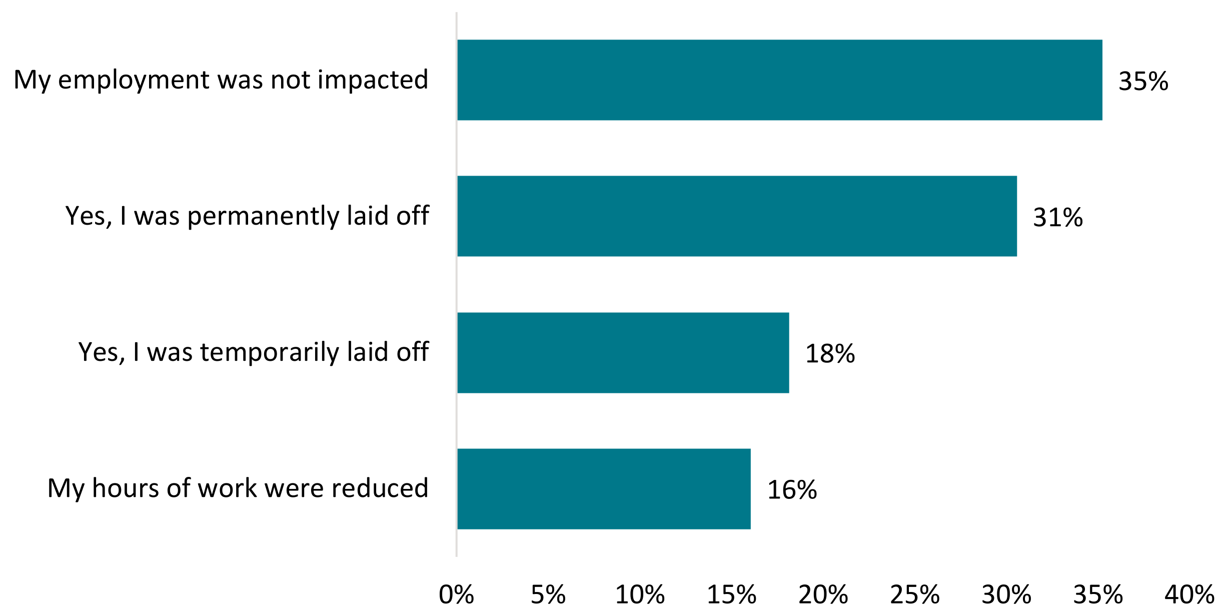
When asked which sectors have seen an increase in job postings, respondent's food services (50%), health care (31%) and agriculture (17%) were most often mentioned. It is noteworthy that these sectors are all related to the impact of COVID-19 on the local economy. On the other hand, 25% of respondents mentioned no sectors had increased postings. Deliver drivers and construction where sectors mentioned under the other category.

Figure 40: In which of the following sectors have you seen an increase in job postings?

Mention	Percent
Food Services (grocery stores, restaurants, warehouse/distributors, etc.)	50%
Health care	31%
No sectors have increased postings	25%
Agriculture	17%
Manufacturing	11%
IT and Technology	8%
Other	8%

When asked if COVID-19 impacted their employment, 35% of respondents mentioned their employment was not impacted. On the other hand, 49% of respondents are temporarily or permanently laid off, and 16% have had their hours reduced.

Figure 41: Was your employment impacted by COVID 19?



Background Demographic Information

Figure 42 Please tell us a little about yourself. How old are you?

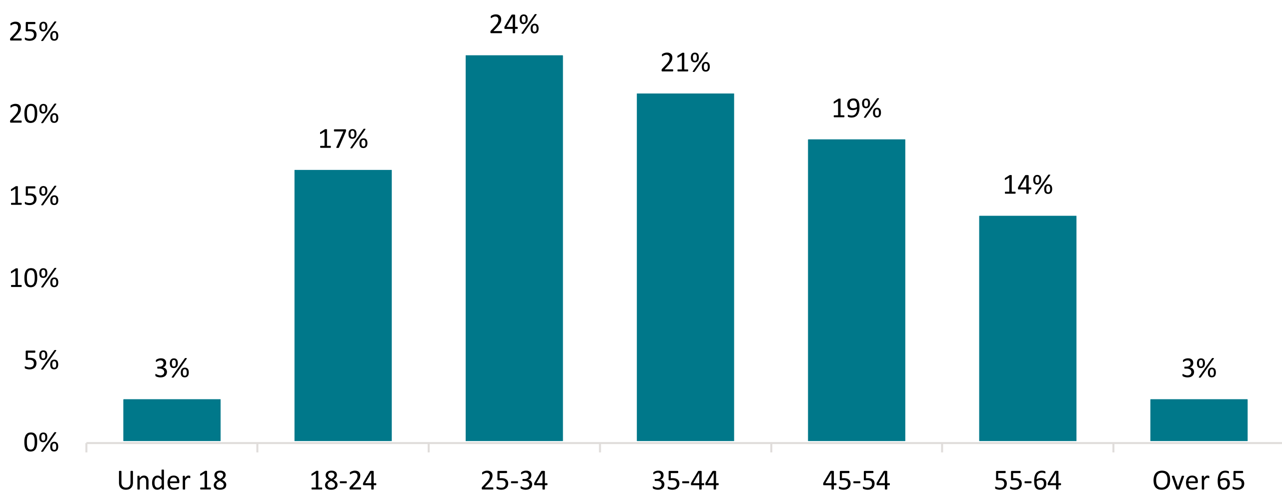


Figure 43: What is the highest level of educational attainment you have?

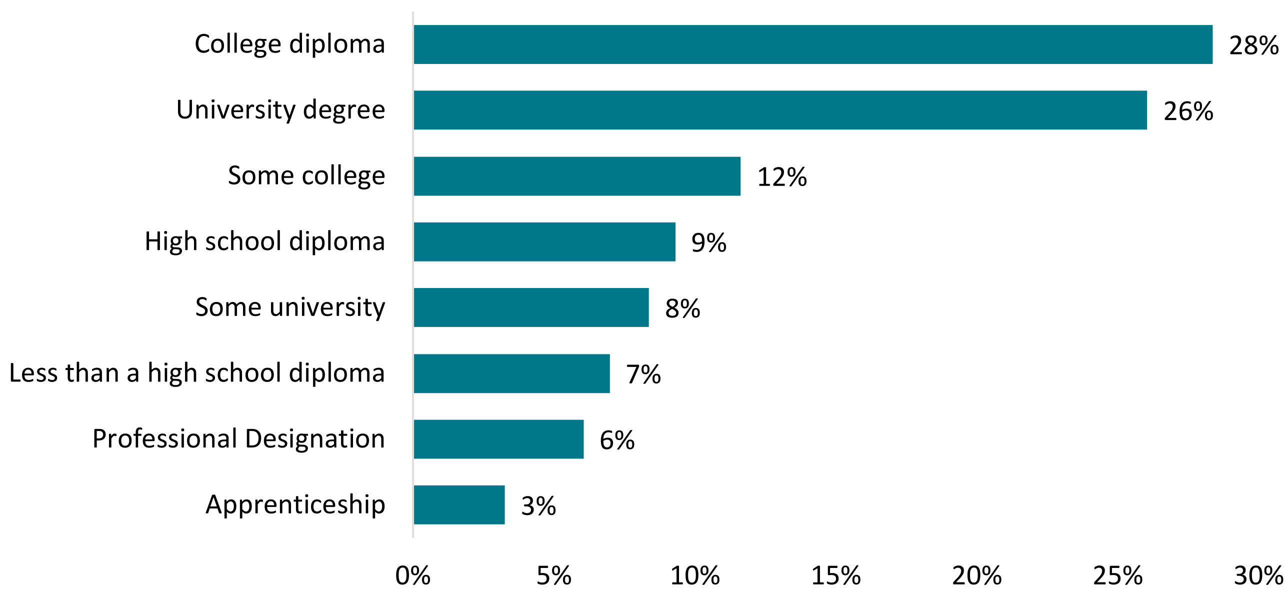
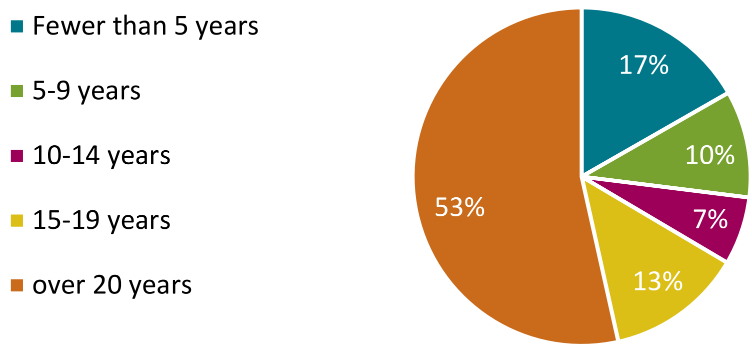


Figure 44: How long have you lived in the Southwest Alberta region?



Southwest Alberta Skills Study

Presented by: Trudy Parsons, Jordan Tidey, MDB Insight

Date: July 10, 2020

SOUTHGROW
REGIONAL ECONOMIC DEVELOPMENT
GROWTH•INNOVATION•PROSPERITY

Lethbridge College

Economic Development Lethbridge

Community Futures Alberta Southwest

Vulcan County
ECONOMIC DEVELOPMENT

ALBERTA SOUTHWEST
REGIONAL ALLIANCE

Taber Economic Development

Funded by:

Canada

Alberta

Session Overview

The Industry roundtable sessions were hosted as part of the engagement activities of the Southwest Alberta Skills Study. The focus of the Roundtables was:

- Engage in a more in-depth conversation that allows for exploration of findings from the business survey, gathering insight into the “what is happening.”
- Understand the challenges facing Educators locally
- Explore approaches being utilized to respond to challenges
- Test the labour market profile with “on the ground” experience.

The study will offer tangible solutions to local challenges related to skills needs in the labour market, ensuring that our resources are being best allocated and that efforts are coordinated for maximum results.

The sessions were held virtually on May 28th , June 10th and June 18th, 2020

Session Themes

- Top Workforce Challenges Employers are Facing:
  - Soft Skills
  - Wages (High Expectations)
  - Attracting Workforce to the region
  - Continuous learning access and support
  - Recruitment
  - Transition Training
- Most employers source all their employees from the local region with a few agricultural firms using the temporary foreign worker program
- The ratio of new grads to retirees is concerning to several businesses particularly in the trucking industry
- Accessing Training remotely in a cost and time effective manner is a concern
- Attracting workforce to the region is difficult, lack of awareness of the area and what it has to offer in both lifestyle and work opportunities
- Micro credentialing, including a system of recognition of soft skills was an area of interest for the employers

Session Themes

Positions Employers are having difficulty finding workforce to fill locally							
Sheet metal mechanics	Engineers	Technologists	Production Staff (Technology Ready)	Management	LEAN Trained	Mechanical Millwrights	Qualified truckers

Skills Gaps Employers are facing					
Leadership	Communication	Continuous Learning mindset	Divers Licenses	Soft Skills	Digital Literacy (HTML)

Session Themes

- Lack of awareness of all the programming and supports that exist in the region
- A clear desire to collaborate more closely with Secondary and Post Secondary institutions to improve student awareness of local opportunities, career pathways and experiential learning
- A desire to make the process of connecting with students easier and less labour intensive
- Employers would like to see KPI's relating to post secondary outcomes, placements and retention in the region
- Employers are also interested in collaborating on training to make it more accessible locally at lower cost particularly in LEAN Manufacturing
- Fort MacLeod businesses reported success in attracting and retaining workers from the Philippines, helping to develop a local community that supports newcomers
- Employers suggested making co-ops mandatory

MDB INSIGHT

Roundtable Questions

1. Over the next five years, what do you anticipate to be your number 1 challenge with respect to demand and supply of skilled and professional talent?

- Workforce needs to understand that careers will include continuous training
- Attracting workforce to the region is difficult, lack of awareness of the area and what it has to offer in both lifestyle and work opportunities
- Training and upskilling, is a responsibility of employers, but there needs to be a trade off between the two
- Specific Jobs:
  - Sheet metal mechanics
  - Engineers
  - Technologists
  - Production Staff (Technology Ready)
  - Management
  - LEAN Trained
  - Mechanical Millwrights
  - Qualified truckers
- Specific Skills Gaps
  - Leadership
  - Communication
  - Continuous Learning mindset
  - Divers Licenses
  - Soft Skills
  - Digital Literacy
  - Technology Ready for the Food Industry

1. Over the next five years, what do you anticipate to be your number 1 challenge with respect to demand and supply of skilled and professional talent?

- Reskilling and upskilling are challenges industry could do a better job on accessing external training: onus is placed on the individual to develop their own skills, but training costs are high
- Disconnect between education and skills many soft skills need to be gained through experience, new grads are not able to preform at higher levels right away and have high pay expectations
- Number of people retiring in the trades vs. new grads
- Apprenticeship, hands on learning shows what you are going to do in the job, not always an option in diploma or graduate programs there is a disconnect with real life experience, management training should have a real world experience, how do we get people out, they are disappointing each other on supply and demand.
- Businesses need to understand the supports that are available
- The competitive wage rate, we have to pay a premium, for pulling people into the community, some are not willing to travel, its our ability to provide continual training, (first aid, fork lift, soft skills, computer training, leadership opportunities are key)

1. Over the next five years, what do you anticipate to be your number 1 challenge with respect to demand and supply of skilled and professional talent?

- Access to courses that provide the training we need, there are grants, employees and employer deciding a common ground on training, finding those opportunities is the challenge
- Local training available not a fitting it into operations, time of year can be a bigger factor, seems to be a trend to move to asynchronous training platform, working around the schedule, Can be self paced or blended online and onsite or face to face options,
- Holes in training, starting younger, education is not always the classroom, the students don't have the soft skills when they come out, they need to be into more of these things, in trades, hand eye co-ordination skills are not being taught the same way in high school
- Improved access to LMI, surprised new grads are surprised they realize where they have invested in their education is not who and where they are, they take that and transition, understand at an earlier age, with hands on, what jobs are out there, what the opportunities are there
- Digital literacy, need to keep up as technology requirements of the business are changing
- Continuous learning, build the future workforce, use immigrants to fill in gaps, take the existing workforce and help them transition, continue to skill up


Top Challenges
Mentimeter
1st
Soft Skills
2nd
Wages
3rd
Attracting workforce to the region
4th
Transition Training
5th
Timing of training, fitting it in
6th
Continuous learning access and support
7th
Lack of experience
8th
digital literacy
9th
Incomplete Training
9

Session 3 Ranked Challenges

2. When recruiting new talent to your business from outside of the area, what is your primary market?

- Most businesses are sourcing most of their employees locally “Most of the talent is in the area, unless it is very specific to an industry”
- Specific skill and management are being sourced from outside the region
  - Most commonly Calgary but across Canada and Europe were mentioned
- Lack of local talent has slowed business growth
- The Rural Immigration program in Taber and Claresholm has seen success “We’ve approved 3 immigrants, gives us control over applications, get them to commit, eliminates those who are looking for a larger center”
- Post secondary education, clearly a disconnect with understanding what the real costs are to everyone with making bad decisions, education in programming need a dating app for jobs, preferences and how to connect in a better way, not understanding the expense,
- University Agriculture Program Students from Quebec do internships locally they get resume experience and references,
- Companies hire programmers from everywhere, they are not afraid, the hard goods industries require staff, the industry will dictate
- Depends on the type of Labour, professionals go to larger centers, general Labour smaller centers, (Calgary to Lethbridge can be easier if they are looking to move/lifestyle change)
- Limited knowledge of southern Alberta, lower wage area compare to other areas in the province, when people are looking for a specific lifestyle, people leave if it isn’t the right fit, some leave as quickly at they arrive, the person who is looking for this type of lifestyle

3. Are you aware of an employer-led collaborative working on the development of a talent pipeline for your sector?

- Informal group of HR people that meet every few months to share ideas in the food industry, “Struggle to keep people, high turnover, not a bad thing to meet every so often to talk“
- Worked with several, skills trade committee group, local group, working with career transitions and epic trade shows, problem is rooted at the high school level lost the ability to do job shadowing, experiential learning, get back to work experience, when they find something they like early they are more likely to pursue it
- Shop class was standard, some people come out but do not know how to use tools or fundamentals, work with things, lose the ability, virtual and online,
- COVID Concern for hands on lab driven learning, bias teachers came through academia, can be over promoted
- Teachers not aware/biased
- Last year/year and a half, trying to get momentum, provide experience and opportunity, will take good candidates try things out,
- Working one on one less efficient, administrative issues, HR, Resume sorting, process could be easier,
- Management training, co-op from college and university can be invaluable in terms of training
- Education Employer collaboration or partnership with equipment donated? Ag Technology degree program, high tech farm, equipment

3. Are you aware of an employer-led collaborative working on the development of a talent pipeline for your sector?

- Manufacturing (lean) interested in brining kids in person and virtual VR tools, factory tours, went to Japan and elementary kids were on tours, stumbling block in order to get funding, tight timelines,
- Integrated supply chain local employers, career and employment preparedness, (micro credential) deliberate not overlap or duplicate other programming
- Hired a teacher, collaborated, brought students into our business on rotation, 10 students applied and went through all departments, not just heavy duty technicians, software, accounting working with local businesses to educate the students in collaborating with the college, district 51, get students to do more stuff, try more things, realize they have an opportunity if they are given the chance to try
- We've had 7 RAP, registered apprenticeship programming, shadow programming, try different things, tech, sales, broad spectrum
- Chamber developed junior chamber program was going well until COVID, they apply and let us know what they want to do, they get connected with a position to help them develop skills, certificates and letters for resume and scholarships
- Vulcan County, partnered with SouthGrow and SAAEP, partnered to develop the skills pipeline into renewable energy, job task seminar, free to those who are registering, have a capacity of 300 almost full, reached out to Lethbridge college, large employers, Greengate, objective is to educate on the jobs, training and how to integrate skills set and develop a training workshop, identify how we can create and retain jobs based on those large projects

3b. What would an ideal collaborative look like to you?

- Awareness of needs LMI, database with access “This requires an agency to lead it and foster the collaboration and connections”
- Reduce Administrative burden working with councilors, make it easy
- Culinary Advisory board, collaborates with teachers and reps, excellent opportunity for the stakeholders to meet, discuss skills and curriculum, not sure if it exists in other program areas
- Education, discussing with employers about the skill levels required to make students employable, match the skill level to the employer, aiding training,
- Students don’t know what is in the community, new techs the VR, put kids into the skills, to expose them to working with hands, reducing liability, recently available
- College has a VR, AR program, looking to lead the way, Maintain automated machinery is expensive, the tech is getting future, AR is the future
- Not sure it helps at the university or college as some trades we need are not offered there,
- Better success dealing with career councilors through skills and RAP placements
- Very few co-ops, make it mandatory, identifying different types of industries, meets the needs of employers and employees it is limited, why not other industries,
- Job creation, limited co-ops need to be more inclusive, just the top students filling those positions, other job creators don’t necessarily fit that mold,
- Issues with assessment of expertise, willing to put the effort in, look at resume people getting culled out due to GPA

4. How might immigration and/or interprovincial migration provide a solution for overcoming a shortage of talent in Southwest Alberta?

- Claresholm, settlement site for immigrants, large number of international applications/interest
- We are seasonal at Lantic, we rely on out of province, northern Saskatchewan
- VRP We use a lot of immigration, due to labour shortage, using recruitment firm, long time employees from Mexico referring people, lots of people in with the skills set, referral payments, immigration consultant to hire Ukrainians, Russians and South Africans,
- Perspective on shorter term impact of COVID on the labour force availability?
  - More people available for work, some businesses are closed for good
  - Permanent and seasonal 6-month employees
  - CERB causing staff to not want to go to work, design issues, earnings reduce incentive, no regional sensitivity

4. How might immigration and/or interprovincial migration provide a solution for overcoming a shortage of talent in Southwest Alberta?

- Helped two eastern European families, went to smaller communities and then moved to Calgary, immigration Canada MTV (Montreal, Toronto, Vancouver) doesn't matter where they come from they like larger cities, immigrant came through the trucking program, feedback that the experience was not as ideal as possible
- Reality is, if we are not tracking turnover, you are missing the boat, trying to understand why, exit interviews, 200% not uncommon, in the skilling and upskilling area what are we tracking at the constituent and business level,
- Support for employers, understand key indicators and how to track, HR support, in smaller businesses
- Improved LMI tracking success rates, reason why there is turnover, accountability for the students, understand how their actions affect the economy, from an ROI perspective
- Barriers, access candidates from afar and relocating, unless they can be on site to be able to demonstrate skills, adds risk, ways to mitigate risks,
- Trips to the Philippines to recruit, is meeting their needs, large growing population in Fort Mcleod,
- Micro credentialing develop a system of recognized with the employees, level of competency based on those skills, can access programming on soft skills, when they are backed by institutions, transitioning to being able to offer recognized credentials,

5. How can businesses be supported in the development of the next wave of skilled talent?

- People used to be transient, economic challenges have impacted the ability to change jobs, staying does not mean they are engaged, want to stay but be challenged and develop skills, how do we help employers to provide new opportunities for their employees to develop new skills, subscription skills for upskilling,
- Track KPIs and develop methods to address these challenges, focus on working with employers that understand their industry,
- We've collaborated with Lethbridge College, our employers are not knowledgeable about what goes on at the college and what it can offer,
- Sector representatives and college, at the school district level? More at the post secondary level, our school divisions don't have the funds or expertise,
- Culinary advisory board, high school programming not a lot of success, kids at that age have no idea, 10% that know 90% don't, two-week placements, find a way to make it engaging, at the post secondary level
- Companies have been pushing for Lean training in each others' facilities
- Micro-credentialing, college initiative, Collaborative Centre of Excellence, some have foundational skills and just need an upskill, not a full credential
- Working with Southern Alberta Truck Group, they are retiring faster then they can replace them, technology and lack of access makes it more difficult to recruit, challenge, costs and insurance challenges, can't insure new drivers unless you are underwriting yourself

5. How can businesses be supported in the development of the next wave of skilled talent?

- Continuous improvement, advisory programs exist for number of programs, sometimes they lag and need to be updated, there should be more, have them more tightly tied to where their students go the college is leading the university in the advisory committee space
- Support system in Southern Alberta is important, lifeline, facing difficulties, many programs will suffer in the wake of COVID, where spending decisions will be made in the future,
- Career transitions supported by five school districts, is an efficient mechanism for coordination, connections and support is important, asset to our business and the community, the reality of rebuilding would cost a lot, reduce hiring,
- Similar techniques used for mature workers and with new graduates, students, critical for workers and employers, help prepare to what employers need, career development is less invested and hurts our workforce, correlated disconnect from the workforce, 30th anniversary, we average 83% employment 3 months after the program working, Career Transitions name of program Judy
- Having conversations with students and teachers, aware of other skills paths and options beyond university,
- Taber LGM community, leave by 9th grade to begin working, involve them in education options, help them stay in school, not fall through the cracks, they have skills, we are losing them as skilled workers, taking up minimum wage jobs, a lot more focus, recruiting them to stay in school
- Distance from faculties/facilities is an issue, loss of productivity, onsite training is a benefit, VR or physically come to the facility
- Programs with the Excellence in Manufacturing, management training, 8 week program but is only 4 hours a week, pulled 12 people off the floor, the outcome is they are given a problem to solve, inexpensive

MDB INSIGHT

Southwest Alberta Immigration Sessions Summary

Presented by: Trudy Parsons, MDB Insight

Date: June 1st, 2020

SOUTHGROW
REGIONAL ECONOMIC DEVELOPMENT
GROWTH•INNOVATION•PROSPERITY

Lethbridge College

Economic Development Lethbridge

Community Futures Alberta Southwest

Vulcan County
ECONOMIC DEVELOPMENT

ALBERTA SOUTHWEST
REGIONAL ALLIANCE

Taber Economic Development

Funded by:

Canada

Alberta

Session Overview

Two Immigration focused sessions were hosted as part of the engagement activities of the Southwest Alberta Skills Study.

The study will offer tangible solutions to local challenges related to skills needs in the labour market, ensuring that our resources are being best allocated and that efforts are coordinated for maximum results.

These sessions were held virtually on May 12th focused on service providers and May 26th focused on immigrants to Southwest Alberta.

Session Themes Support Providers

- The service providers agree there are significant barriers to attracting and retaining immigrants in the Southwest Alberta Region
- There are a wide variety of services available to support both businesses and immigrants but there have been disconnects in both awareness and access
- There is a desire to collaborate and engage with additional partners to improve services and access

Session Themes Immigrants

- Newcomers are facing barriers in getting jobs and integrating into Southwest Alberta
  - ESL, getting the first job and recognized Canadian experience or references and recognition of skills as compared to credentials
- Supports Requested include: Improved access to existing services, transition programming, career bridging, job shadowing and resume writing
- Participants would like to encourage employers to be more open to hiring immigrants and have more inclusive corporate cultures
- Continue to promote and make information more accessible to the immigrant community

Roundtable Questions Support Services

What is your interaction with immigrants to Canada? To Southwest Alberta?

- Social media is being used by employers to attract immigrants
- Southern Alberta is rarely identified as a region of choice, with Montreal, Toronto, Vancouver seen as better prospects with support networks and opportunities.
- Some groups have been successful attracting workforce through promoting, QOL and Cost of Living in the region.
- Many immigrants are highly skilled but cannot land or stay in positions, ESL but also barriers in the application phase including soft skills, teamwork and adapting to the corporate culture.
- Employers are better at credential assessments but bad at assessing foreign experience.
- Claresholm is seeing major interest: in 6 weeks 10K applications, the challenge is assessing fit, intention to reside, community connection.
- One existing community is seeing success specifically in food processing with Filipino candidates.
- Some are arriving at support services frustrated and may have burnt bridges at sooner we can connect with them the better, avoid burnout

The most mentioned barriers to hiring immigrants in the survey were Language / ESL and Concerns that qualifications/professional designations don't meet the Canadian standard. Do these concerns align with your experiences?

- There are sometimes ESL issues even with Economic Immigrants who need to pass an English exam. There can be frustration in understanding one another at the workplace, often due to the specific vocabulary used within the industry.
- A Toolkit has been developed for downtown businesses to help develop a sense of community
- There are cultural barriers and stigmas that exist within our community that affect Newcomers. We really can't dance around this reality.
- Connections to our local industry associations will be helpful to understand the key industry language and as facilitators E.g. Construction Assoc., Industrial Assoc., Builders Assoc.
- Understanding of the ESL guidelines, not trade specific, what do the levels mean, simplify language, guidelines exist languages Canada, disconnect between language providers, advocate for the student, Translate to employer speak, simplify, clarify,
- Micro credentialing for languages, big in UK,
- people can obviously be involved with the LIP, there is also the Lethbridge Diversity and Inclusion Alliance which the City supports financially - Victor mentioned that he is one of the Co-Chairs. That group is open to anyone interested in building a welcoming and inclusive community.
- The City is also going to be hosting an Inclusive Hiring Conference in October
- The City also will be looking to diverse populations to review our hiring practices to identify barriers.

What needs to change to allow greater support for immigrant integration into the workplace in Southwest Alberta?

- Businesses preferred methods to obtain support and information: Sharing of best practices, ESL Providers, Workshops, Mentorship from other employers
- Common language, clarity,
- Awareness of resources, access before they arrive, simplify access, LIPs?
- Perception the services were not available to them for example the Lethbridge Family Services, website to put it all together, is being used, 50 partners, 15 sectors, 25 organizations to use the website,
- Creating a more welcoming and inclusive community for all who call Lethbridge home. Resources for newcomers, employers, service providers and the community.
- lethbridgeimmigration.ca

How might Southwest Alberta present itself as a welcoming community?

- During the recruiting process focus on markets with local synergies and similar lifestyles for example areas of Brazil have similar crops and individuals who would like to immigrate
- Examine synergies and target recruitment in those areas
- The most successful recruitment occurs when there are connections to the region, look at culture, community characteristics and structure outreach.
- Promoting access to restaurants, foods from home countries, reflect the culture of immigrants, make sure they have access to essential products and services.
- Support the community’s adaptation to the new population.

What role can your organization play in achieving that vision?

- Work on developing an advisory committee that includes the School, hospital, NFP, Chamber to improve inclusiveness
- Develop a welcoming committee that facilitates making 1 on 1 connections this is currently in use in High River and Strathmore
- Settlement services and Economic Development should provide a facilitation and partnership role with the LIP
- There is an identified the need for a Labor Market Partnership and more data.
- Work with Recovery Task Forces
- Develop community retention strategies
- Help align seekers with jobs and part of workforce and resident recruitment strategies
- Combat the perception of immigrants taking jobs which is already starting to resurface.

Roundtable Questions Immigrants

Generally, what has been your experience in your job search in Southwest Alberta? (positive, negative, secured employment in my field, etc.)?

- Opportunities, employer did not give the chance to show skills. Barriers for new immigrants as they can't provide local references.
- Language was a barrier with some of the opportunities pursued.
- Came into the country with strong skills and references. Volunteer with immigrant services and the red cross and built networks that help her to land a job. Challenging for new immigrant to find the balance on the skills they bring from their home country and the local employers are looking for.
- Experience play a very important role. Having the references was also difficult, specially for jobs in finance and banking. It is easier to get a job in Lethbridge compared to bigger cities such as Calgary. Volunteering to show skills. Sponsored by the Federal Government to enhance skills.
- Employers do not give the opportunity due to the lack of local references.

What barriers have prevented you from securing employment in your field or in a position that utilizes your skills, knowledge, credentials? (education, source country, lack of Canadian experience, etc.)

- Recognition of language
- Recognized Canadian experience or references
- Recognition of skills as compared to credentials
- Cultural background

What additional supports would benefit you in your job search?

- Transition programs, the government should create a platform to get Canadian Experience. E.g. banking
    - Career Bridging Program
- Provide opportunities to allow newcomers to get Canadian Experience through job shadowing
- Transportation (to secure the job and get to work)
- Awareness of living conditions in Southwest Alberta (what does life looks like?, e.g. weather)
- Resume writing. How do people demonstrate the transferability of skills?
- There are systems in place for certain type of immigrants, but these do not cover all newcomers
- Training Inc.

What needs to change to allow greater support for immigrant integration into the workplace in Southwest Alberta?

- Educating employers is equally important. Creating a platform to discuss about the culture, backgrounds, etc.
- Value the international experience immigrants bring to the local economy
- Show more diversity in big corporations and government, as they can give example to other employers
- Educating employers on the immigrant population that have chosen Southwest Alberta as their home (share key learnings that employers should know about immigrant communities that reside in the area, e.g. language)
- NYSC - National Youth Service Corps (Nigeria): intern and work for a period of time to integrate people into the workforce

If you had the opportunity to speak directly to employers about hiring immigrants, what would your message be?

- Be open minded
- Give people the chance, trust them
- Stereotypes
- Be inclusive and diversified
- Be patience
- Take intelligence risk

How might Southwest Alberta present itself as a welcoming community?

- Improve communication – help people find their way in the community (e.g. affordable housing, transportation, groceries, how to find a job)
  - Having the resources to provide these services
  - Use social media platforms to facilitate reach out
  - Connect people with groups they identify/relate with
- www.lethbridgeimmigration.com (website has all basic information for newcomers) – accessible for mobile devices (phones).

MDB INSIGHT

Education Roundtable Presentation Summary

Presented by: Trudy Parsons, Jordan Tidey, MDB Insight

Date: June 3, 2020

SOUTHGROW
REGIONAL ECONOMIC DEVELOPMENT
GROWTH•INNOVATION•PROSPERITY

Lethbridge College

Economic Development Lethbridge

Community Futures Alberta Southwest

Vulcan County
ECONOMIC DEVELOPMENT

ALBERTA SOUTHWEST
REGIONAL ALLIANCE

Taber Economic Development

Funded by:

Canada

Alberta

Session Overview

The Educator roundtable sessions was hosted as part of the engagement activities of the Southwest Alberta Skills Study. The focus of the Roundtable was:

- Engage in a more in-depth conversation that allows for exploration of findings from the business survey, gathering insight into the "what is happening."
- Understand the challenges facing Educators locally
- Explore approaches being utilized to respond to challenges
- Test the labour market profile with "on the ground" experience.

The study will offer tangible solutions to local challenges related to skills needs in the labour market, ensuring that our resources are being best allocated and that efforts are coordinated for maximum results.

This session was held virtually on June 3rd

Session Themes

- COVID-19 is creating a great deal of uncertainty, creating high unemployment and shifting the skills required by employers
- Improving accessibility to training through micro credentialing and encouraging employers to invest in training is a major focus
- There is broad consensus that youth need to have more opportunities for experiential learning, including tours, co-ops and internships
- Participants agreed that new graduates are having difficulty articulating soft skills and experience when they apply for their first job, making it more difficult for them to find employment
- According to educators the top challenges facing employers are:
  - Soft Skills, Disconnect between employers and job seekers, COVID Uncertainty and Difficulty clarifying soft skills and experience

Session Themes

- The top challenges the education sector is facing are:
  - Funding, New program competencies in skills areas, Employers not funding professional development
- There is a consensus that due to lack of funding and the need to be more effective, education institutions will need to work together with industry to:
  - Develop and access LMI including alumni tracking
  - Provide more up to date, flexible and online programming
  - Connect Students to jobs by making them aware of the opportunities
  - Improve Experiential Learning
- There is a consensus that a wide variety of excellent programs are available but not always easy to access or do not have broad awareness, highlighting the need for improved LMI and coordination

Roundtable Questions

1. Share your general perspectives on the labour market in Southwest Alberta.

- COVID-19 is creating a great deal of uncertainty, creating high unemployment and shifting the skills required by employers
- Prior to COVID there were identified skilled labour shortages in Medicine Hat, the region had a hard year economically with, rising unemployment related to the oil and gas sector and new industries like Cannabis are also in downturn
- The group has not yet seen a large number of energy workers trying to retrain/reskill due to the downturn
- There are 400 newcomers from 34 countries in the Taber area, but they face barriers in literacy, drivers' licenses, Canadian certifications or equivalency
- There are 22 businesses run by the Mennonite community locally, they are significant players in the economy
- There is a desire to connect youth to business and industry, let them know things will move forward, climate of positivity, there will be opportunities, connect them to the university and businesses, post secondary and business support those connections, have some confidence in our youth, and businesses that they will reimagine the market, critical thinking, skills, innovation centered beyond preparing for a market, but learners and thinkers who can respond to change,
- Fear exists right now, youth are facing challenges, CYPC webinar, lesser uptake at post secondary possibly,
- Youth out of post secondary, employers are looking for experience, seems to be difficult to find jobs, without the first job its challenging,
- Some businesses will not be reopening, in some areas a saturated market with new entrants
- Seeing some applications decrease, greater focus on work integrated learning, employers hire at a subsidized cost and create the opportunity for increased employment

Mentimeter

1. Share your general perspectives on the labour market in Southwest Alberta.

There tends to be cutbacks in the labour market due to COVID. It tends to be in a holding pattern as the future is unknown.

We're lucky that one of our key industries is agriculture, which somewhat insulates us, but we will eventually be impacted by provincial economic challenges. If the provincial budget weakens, we need a strong labour mkt to absorb public sector job lo

There is a lot of uncertainty in the current market. With COVID what jobs will be available to our community members. Will those that are completing their education still be prepared for jobs because of forced changes in all levels of education

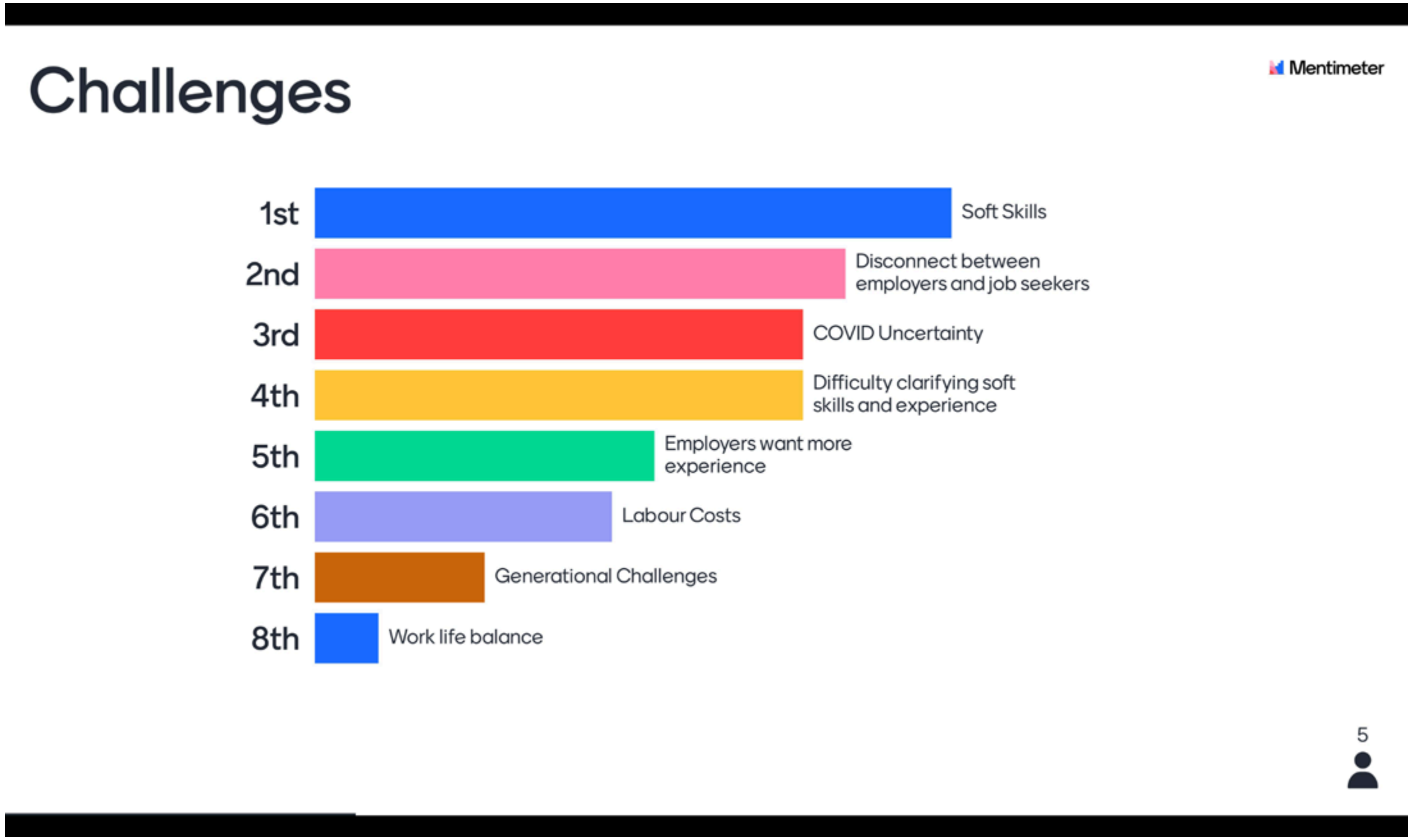
Even before Covid, we've worked to retain more of our post secondary graduates. There is often a bleed of our most valuable resources.

4

2. What do you perceive as the biggest workforce issues/challenges that employers face in Southwest Alberta?

- COVID/Uncertainty
- Employers looking for more experience/less willing to train
- We hear the soft skills are the ones that are most important, general understanding with the colleges and university the technical competency will be there, but soft skills are hard to teach, technical easier, employers want employees that come to them with soft skills,
- Students are having difficulty articulate their softskills, supporting students in expressing soft skills is a critical issue
- Ways to validate soft skills, more structure to articulate, get badges with assessment
- Students in school are having difficulty translating post secondary as experience, field trips, work integrated learning, volunteers, not making that connection, not sure how to make themselves stand out
- New generation that wants flexibility and to be on social media during the workday, work ethic differences, some do not want overtime, different challenges with youth,
- Validate the ability and competency, have a way to showcase what they can do in the workplace

2. What do you perceive as the biggest workforce issues/challenges that employers face in Southwest Alberta?



2a. What action is being taken to address these challenges and who is leading the action?

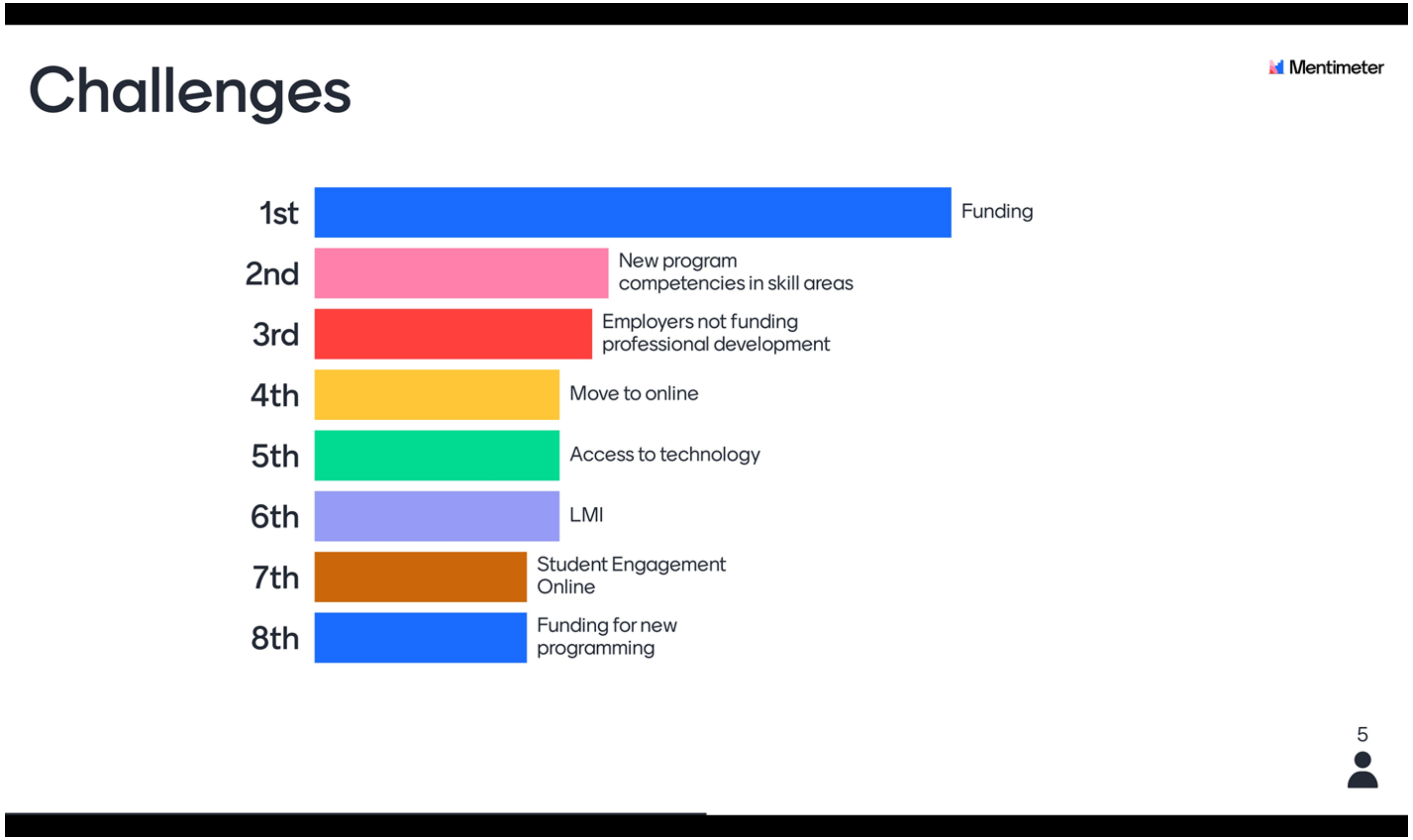
- Employers expect 4-year degree grads to have certain competencies, there needs to be a shared set of courses regardless of program, to ensure a baseline of soft skills
- On that point, we started liberal education program, early start experience course, grade 12 get a leg up on university, huge response, bookending with another course early career start, end of degree help them meet with employers, resume building, volunteer Lethbridge,
- Students work enormous hours in different industries, find the fit they would like, they often get hired, we don't require students to take them, a lot of them are taking them, we are adding sections, commitment to articulate the career they want, yes they are three credit courses, developed more minors, piloted last year, there is demand,
- First years that have applied we send them the recommendation, strong partnership with the Blackfoot Confederacy, partnership on dual credits, programs with dual credits,
- Partnering with University of Lethbridge on dual credits for five years, beneficial, expands thinking, critical thinking mindset, explore and think bigger, expanded to envirotech, engineering, liberal education thinking at the 1,000 and 2,000 level, looking for efficiencies, fill classes
- We have initiatives with off campus coordinators, very productive, challenges opportunities in rural education look different, accessing them has been difficult, issues accessing, partnership between groups has been effective,
- Two days fully online in spring and will be online in fall

3. What are the most significant issues/challenges that the education sector is facing in Southwest Alberta?

- Shift to online learning creating challenges
- Budget cutbacks,
- Post secondaries are major employers facing job losses
- Professional development, employers do not fund, relying on the individuals themselves, if they are not willing to fund it can hold people back,
- Move to at home learning, working with staff to build their capacity, technology and skills development, looks different for engaging students k-12, they won’t sit, engage in more interactive ways, engagement of learners, there will be a growing gap if students do not have support at home or access to technology
- At the college number of students with no access to technology, have to keep commons open to support, may increase with out of work individuals
- Programming aligned with labour market needs, hard to find funding to develop new programming and access to LMI
- Program approval based on old data, 3-5 years to get a cohort through, hard to be responsive, in the past it was easier to get programs approved
- Programs could be developed if championed by strong voices, need for those organizations and skills, was there enough demand to support a full program
- Recognizing some skill sets are not needed every year and are cyclical
- Collaborative centre of excellence, educational opportunities for specific skills, to make it faster and cheaper, continuing studies more agile, that signaling that non-credit courses does not convey the same impression,
- Some of the gaps, does it have the rigor and how we access that
- Jobs aren’t high paying enough, people come out of school with high expectations, they want to jump into positions, challenge employers are dealing, with not high paying in the area, managing expectations

www.menti.com and use the code 22 20 15

3. What are the most significant issues/challenges that the education sector is facing in Southwest Alberta?



3a. What action is being taken to address these challenges and who is leading the action?

- Experience based learning with employers
- Funding, hoping to adapt with collaborations with other institutions, share the financial burdens, collaboration is our biggest friend
- Collaboration agreements signed,
- Solution is collaboration, adult learning courses with other groups and move some courses online,
- Work integrated learning is built into the 10-year plan, build competency into programming, make sure they have that
- Indigenous collaboration and support to help students transition to the new institutions, very important for us, visible minority groups have access to employment opportunities, educational

4. How might the education and training sector further support development of the local talent pipeline?

- Online learning, school systems, use it as a channel, for skills development, continue to be developed
- Interesting to see the k-12, will it enhance skills moving to post secondary, focus on the gap and the transition,
- Need more opportunity to get educators working with businesses, communication and understanding what is out there and what skills are needed,
- Industry sessions will be held with opportunity for others to join
- Connection with industry with the advisory councils, meetings semi annually, shared communication

4a. What is needed to best position these institutions to achieve this goal?

- Access to LMI
- Flexibility on funding
- Collaboration
- Advanced education, pilot program, work with the post secondaries (Reach out to Jane)
- Rural perspective, connection to employers, support us in our programs, budget will be a challenge, efficiencies, shared costs
- Network, be plugged in, work towards a shared vision, measurable outcomes, how successful have we been suggestions for outcomes
- Opportunity for post secondary and school divisions, how the students are doing, alumni tracking, impacts,
- Educator opportunity to gather collectively to engage in these types of discussions
- We do have people responsible, off campus coordinators, they do meet, Zone six will meet and discuss dual credit, could be expanded, different groups come together at different times,

What two key priorities would you include to strengthen the success of talent retention, and readiness?

Mentimeter

1. opportunities for those who don't need a full credential to reskill and upskill2. close collaboration between post-secondaries and the school divisions

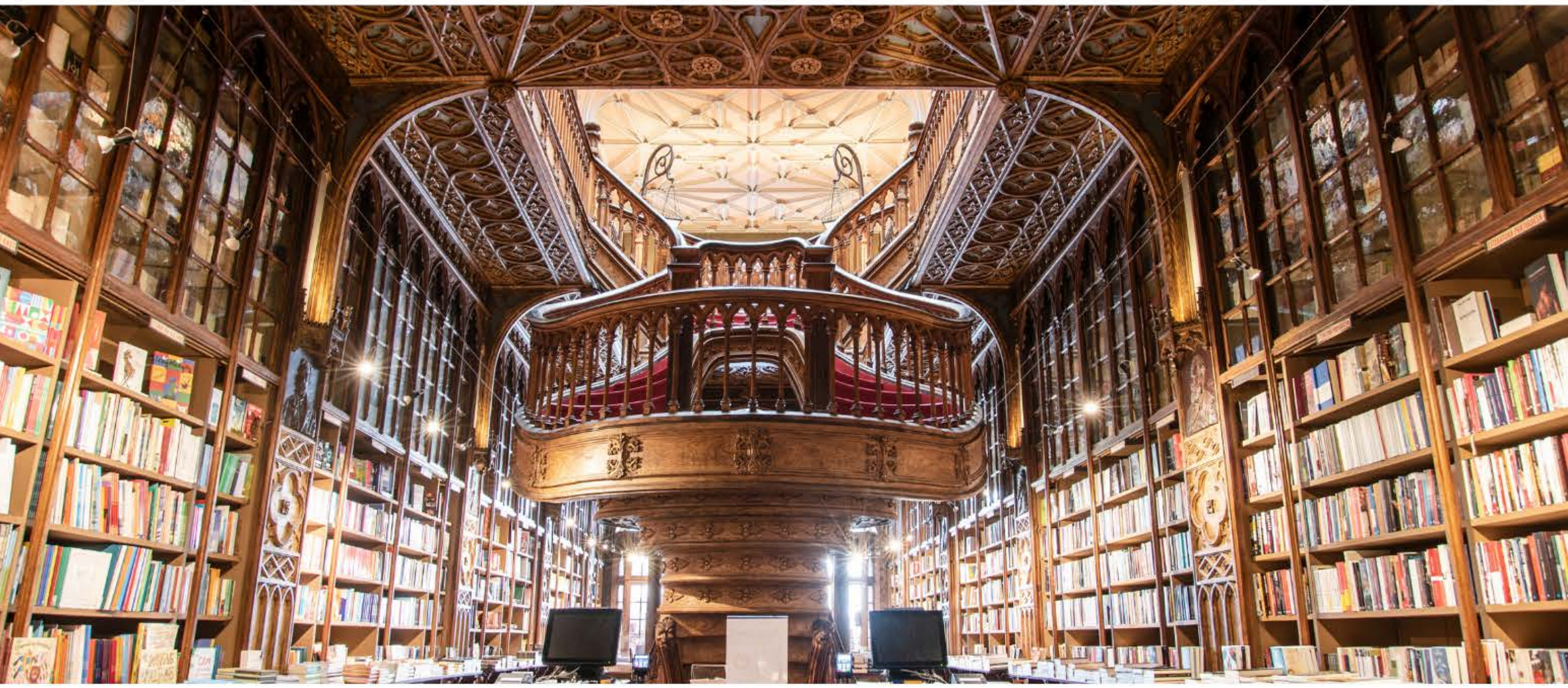
Improved collaboration with employers.

ongoing professional developmentclarity in role expectations and skills required

I love the focus on integrated learning and enhancing coop programs. 1. Continue to tie job creation and placements to funding for businesses as revert continues. 2. Educate the businesses about the talent pool and PSIs as partners for workforce.

1) Employers need to provide management development for their staff in order for potential supervisors to better manage new employees. The education sector could help with this retraining.2) Industry to focus on employee evalns to ensure proper mgt

5



MDB INSIGHT

SOUTHWEST ALBERTA REGIONAL SKILLS GAP STUDY

PHASE 1 REPORT

MARCH 2020

Contents

1. Purpose of Report

The Phase 1 report includes a Background Review, Situation Analysis and Labour Profile for the Study Area as a whole, providing the base statistical framework required to complete the next phases of the project. The data presented here supports the identification of skills gaps that will be further explored through research and engagement, directing the next phase of the project.

2. Economic Base Line Analysis

2.1 Background

This economic base analysis presents an overview of the socio-economic, labour force and industry composition in the following Geographies:

- City of Lethbridge
- Town of Taber
- Town of Cardston
- Town of Fort MacLeod
- Vulcan County
- Southwest Alberta *(formed by Cardston County; Improvement District No. 4 Waterton; Cardston; Glenwood; Hill Spring; Pincher Creek No. 9; Pincher Creek; Cowley; Willow Creek No. 26; Fort MacLeod; Granum; Claresholm; Stavely; Nanton; Crowsnest Pass; Ranchland No. 66)*
- SouthGrow Region *(formed by Warner County No. 5; Coutts; Milk River; Warner; Raymond; Stirling; Lethbridge; County; Lethbridge; Coalhurst; Nobleford; Barons; Coaldale; Taber; Taber MD; Barnwell; Vauxhall; Cardston County; Magrath; Cardston; Claresholm; Blood 148; Vulcan County; Carmangay; Champion; Vulcan; Lomond; Milo; Arrowwood)*
- Study Area (All of the above geographies)
- Province of Alberta

The results are derived from the following sources:

- Statistics Canada, Census Profile, 2016
- Statistics Canada, Census Profile, 2011
- Statistics Canada, Canadian Business Counts, December 2018
- Manifold Data Mining Inc.

2.1.1 Demographic portrait

According to Manifold Data Mining Inc., in 2018, the total population of the Study Area was approximately 206,271 people. Most of the people in the area are concentrated in the City of Lethbridge, which accounted for over 50% of the region's population. By 2018, the Study Area region's population represented 5% of Alberta's population.

In terms of population projections, Manifold Data Mining projects that in 2028 the Study Area Region will increase its population by 21%; this represents an increase of 44,569 people. More than half of this growth will take place in the City of Lethbridge; this city is projected to add 22,718 new residents in the next ten years. The regional growth will be similar to the one expected for the province at 24%.

From the communities showcased in this report, Fort MacLeod's is the only population projected to decrease. The community's population is expected to reduce by 8%, losing a total of 251 residents in the upcoming ten years.

Figure 1: Total population and population projections, 2018-2028

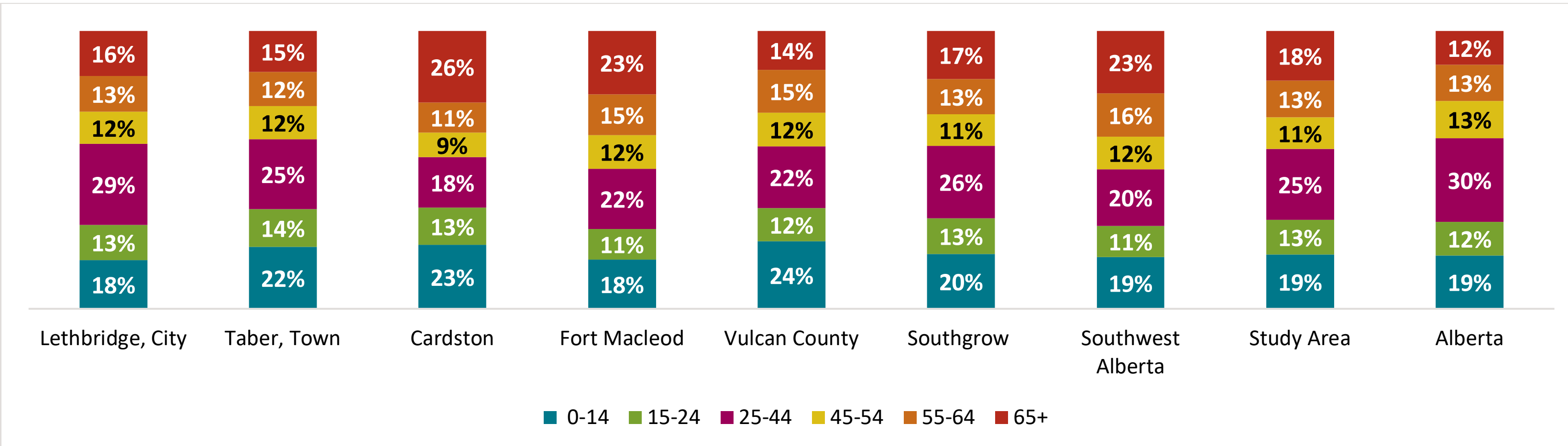
Year	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
2018 Total population	100,551	8,903	3,731	3,026	4,190	179,137	39,603	206,271	4,417,880
2023 Total population	111,446	9,255	3,739	2,894	4,305	198,669	41,435	227,253	4,925,270
2028 Total population	123,269	9,604	3,745	2,775	4,416	219,991	43,379	250,136	5,490,940
10-year net change	22,718	701	14	-251	226	40,854	3,776	43,865	1,073,060
10-year % change	23%	8%	0.4%	-8%	5%	23%	10%	21%	24%

Source: Manifold Data Mining Inc.

Age distributions (see figure below), evidences that the population of the Study Area is relatively young, around 59% of the region's residents are below 44 years of age, and 70% are under 55 years of age. This growing scenario represents an opportunity, as most of the country will face a shortage of labour force due to the ageing population.

Among comparators, Cardston and Fort MacLeod recorded the most significant percentage of its population over 55 years old, over 7% of the Study Area's share, and over 12% of the provincial share.

Figure 2: Age characteristics, percentage of the overall population – 2018



Source: Manifold Data Mining Inc.

2.1.2 Dwelling Characteristics

Most of the housing in the Study Area are single-detached houses, followed by apartment buildings that have fewer than five storeys. The share of people living in single-detached houses is higher in the Study Area compared to the province. This share is even higher in Southwest Alberta, where the percentage of people living in single-detached houses reached 81%.

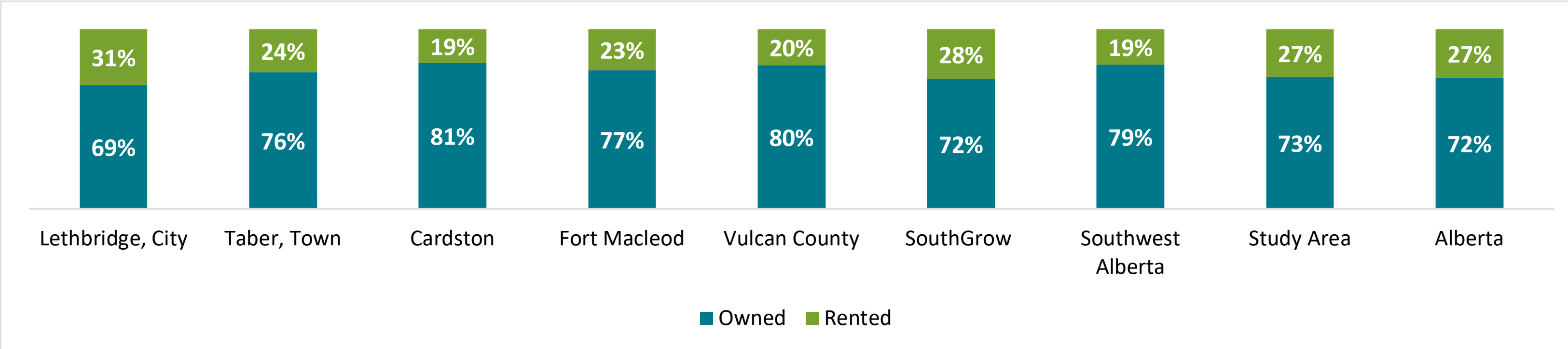
Figure 3: Occupied dwellings by type, percentage of the overall population, 2018

Type of Dwelling	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Single-detached house	63%	72%	90%	79%	92%	69%	81%	71%	62%
Apartment, building that has five or more storeys	2%	0%	0%	2%	0%	1%	0%	1%	4%
Movable dwelling	2%	4%	0%	10%	7%	5%	7%	5%	3%
Semi-detached house	6%	6%	2%	2%	1%	5%	2%	5%	6%
Apartment, detached duplex	8%	3%	1%	1%	0%	5%	1%	4%	3%
Row house	6%	2%	6%	3%	0%	4%	2%	4%	8%
Apartment, building that has fewer than five storeys	14%	12%	2%	4%	0%	8%	0%	7%	15%
Other single-attached house	0%	0%	0%	0%	0%	0%	0%	0%	0%

Source: Manifold Data Mining Inc.

In the Study Area, most of the dwelling is occupied by owners; the share of people renting dwellings represent a 26%, similar to the provincial share of renters. The City of Lethbridge recorded the largest share of renters among comparators at 31%.

Figure 4: Occupied dwellings by type, percentage of the overall population, 2018



Source: Manifold Data Mining Inc.

According to the Government of Alberta Regional Dashboard, 19 of the communities in the Study Area recorded a total of 2,168 building permits during 2018 for a total value of $553.3 million; this represented an increase of 68.8% in the number of building permits compared to the prior year[1].

Figure 5 shows the median value of dwellings is higher is Vulcan County compared to the rest of geographies, followed by the city of Lethbridge. Overall the median value of dwellings in the Study Area is lower than the provincial median. In terms of rent, the Study Area recorded a median monthly rent of $984; this value is lower than the provincial median cost of rented dwellings. Among the comparators, the city of Lethbridge registered the highest median monthly price of rent, followed by Vulcan County.

Figure 5: Median dwelling and shelter costs of dwellings, 2018

Period	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Median value of dwellings 2018 ($)	332,266	272,552	282,800	236,342	376,320	270,049	265,485	267,767	482,306
Median monthly rent 2018 ($)	1,056	943	915	944	983	1,023	945	984	1,259

Source: Manifold Data Mining Inc.

[1] Included communities: City of Lethbridge; Lethbridge County; Taber; Coaldale; Cardston County; Vulcan County; Warner County No. 5; Claresholm; Raymond; Coalhurst; Magrath; Vulcan; Noblefort; Vauxhall; Stirling; Milk River; Warner; Champion; Carmangay.

2.1.3 Income

Population Income

In 2018, the median population income in the Study Area reached $36,948, almost $11,000 lower than the province. Among the comparators, Vulcan County recorded the most considerable median population income at $43,919.

In terms of income growth, not all the communities recorded median income data due to the unavailability of data. However, the available data shows significant income growth in the city of Lethbridge and the town of Taber. Nevertheless, this growth is still smaller than the provincial gains at 31%.

Figure 6: Median total population income 2010-2018

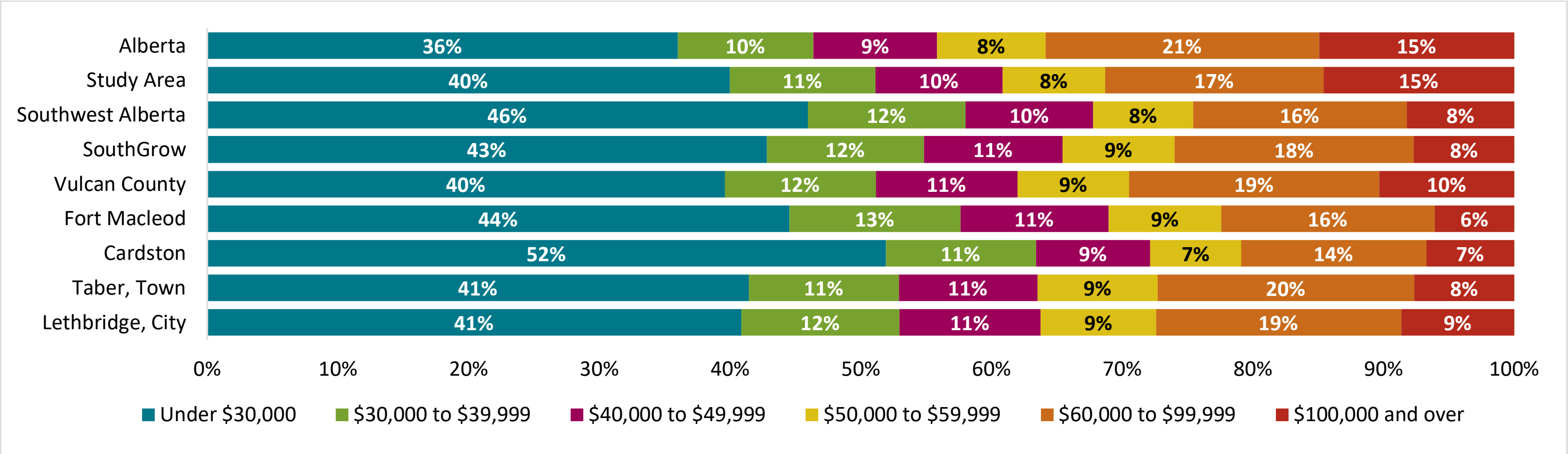
Period	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
2018 ($)	39,650	39,422	31,141	36,657	43,919	38,723	35,173	36,948	47,572
2010 ($)	31,151	31,354	*Not available*	*Not available*	*Not available*	30,506	27,718	29,112	36,306
% change	27%	26%	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	31%

Source: Statistics Canada, 2011 National Household Survey | Manifold Data Mining Inc.

Note: Highlighted figures have been calculated using data from limited communities. Do not use for income growth analysis

Moving to the subject of the income distribution, in 2018, the largest portion of the population in the Study Area received an income under $30,000. Among comparators, Cardston recorded the largest share of people with income under $30,000. There is also an evident income inequality in these geographies, with a relatively low percentage of people making more than $100,000.

Figure 7: Population income distribution, percentage of the overall population, 2018



Source: Manifold Data Mining Inc.

Household Income

In 2018 the Study Area recorded a median household income of approximately $75,336, just over $27,000 lower than the Alberta median.

Among communities, Vulcan County and the Town of Taber recorded the most substantial median household incomes. However, these median incomes are still below the provincial threshold. In terms of income growth, the Town of Taber recorded the most significant increase at 30%, the same as the provincial growth.

Figure 8: Median total household income 2010-2018

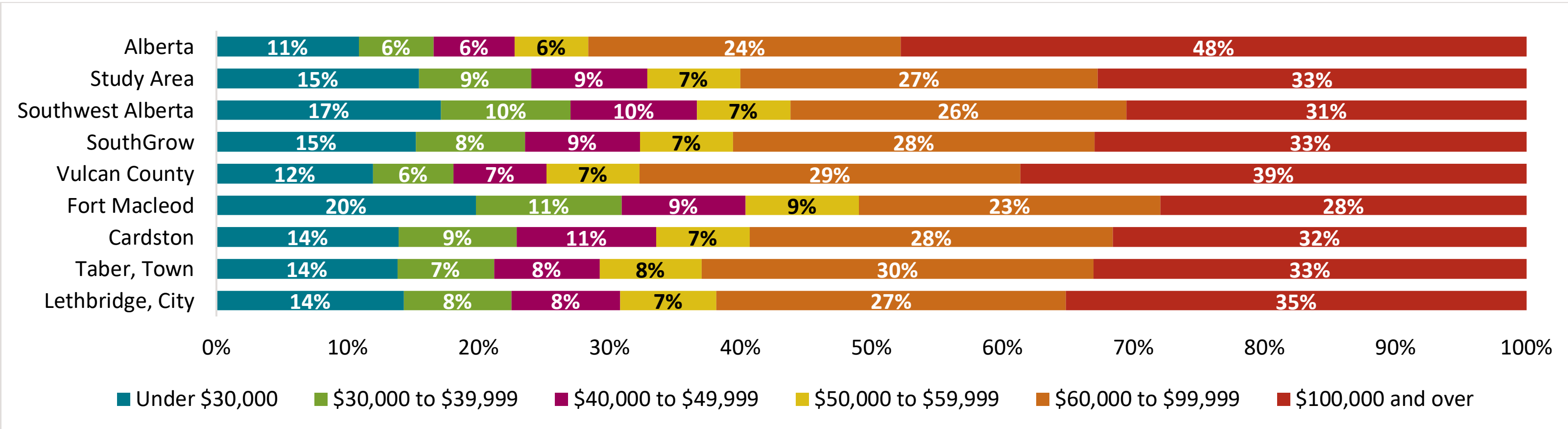
Period	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
2018 ($)	76,311	77,093	72,309	69,466	90,031	78,637	72,035	75,336	102,378
2010 ($)	62,298	59,467	Not available	Not available	Not available	62,924	61,045	61,985	78,632
% Change	22%	30%	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	30%

Source: Statistics Canada, 2011 National Household Survey | Manifold Data Mining Inc.

Note: Highlighted figures have been calculated using data from limited communities. Do not use for income growth analysis

In terms of income distribution, most of the households in all the geographies analyzed received more than $100,000. However, all the communities fall far behind the province of Alberta. On the opposite, low-income households represented more than 10% of the population in all the geographies. According to Statistics Canada, and given the size of the communities, any household income under $30,000 is under the Low-income Cut-off threshold[2]; this limits the availability of disposable income, which impacts local economies as it limits the availability of some residents to participate more actively in the local economy.

Figure 9: Household income distribution, percentage of the overall population, 2018



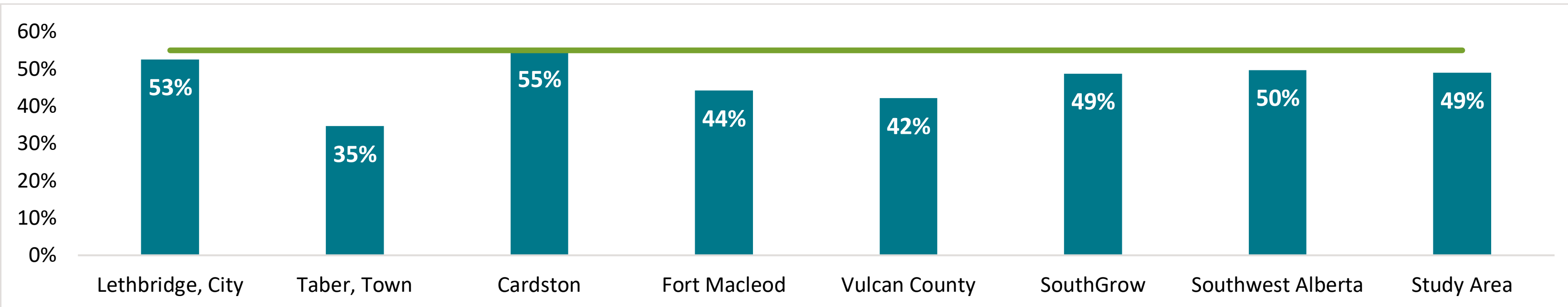
Source: Manifold Data Mining Inc.

[2] Statistics Canada. Table 11-10-0241-01 Low income cut-offs (LICOs) before and after tax by community size and family size, in current dollars

2.1.4 Education

Education attainment is a vital descriptor of labour force capacity. The figure below summarizes skilled labour proportions for comparator areas, which is composed of those people that have completed an apprenticeship, trade certificate, or college or university degree, diploma or certificate. In 2018, approximately 49% of the population 15 years and older in the Study Area had a post-secondary certificate, diploma or degree. Cardston recorded the largest share of people 15 years and older with a post-secondary certificate diploma or degree at 55%, similar to the province of Alberta at the same rate.

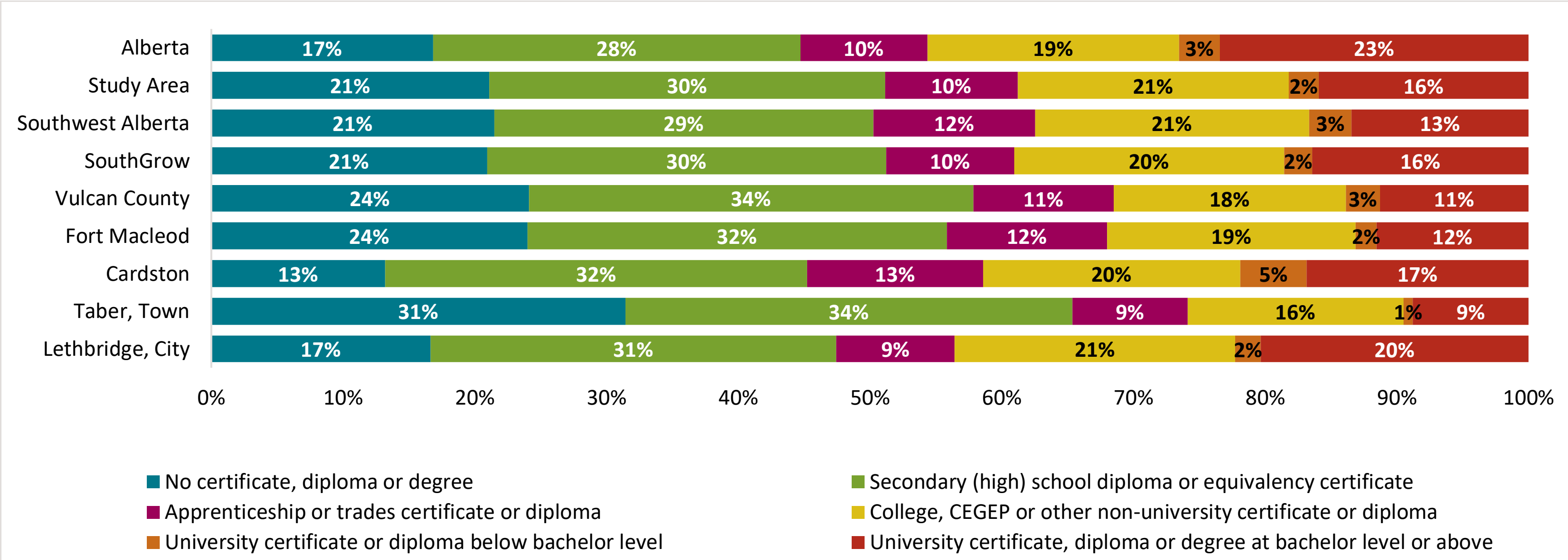
Figure 10: Proportion of population (15 years and over) with post-secondary or apprenticeship education (skilled labour), 2018



Source: Manifold Data Mining Inc.

Figure 11 shows that, for the most part, people in all geographies completed at least high school. In terms of university education, the city of Lethbridge recorded the largest share of people 15 and older with university education at the bachelor level or above; this might be the result of the city being home of the University of Lethbridge.

Figure 11: Highest level of education attainment (15 years and over), % of the population, 2018



Source: Manifold Data Mining Inc.

Most of the people (15 years and over) in all the geographies had a degree in architecture, engineering and related technologies, health and related fields, and business, management and public administration. The percentage of people with no post-secondary certificate, diploma or degree is higher in all comparators compared to the province.

Figure 12: Major field of study (15 years and over), percentage of the population, 2018

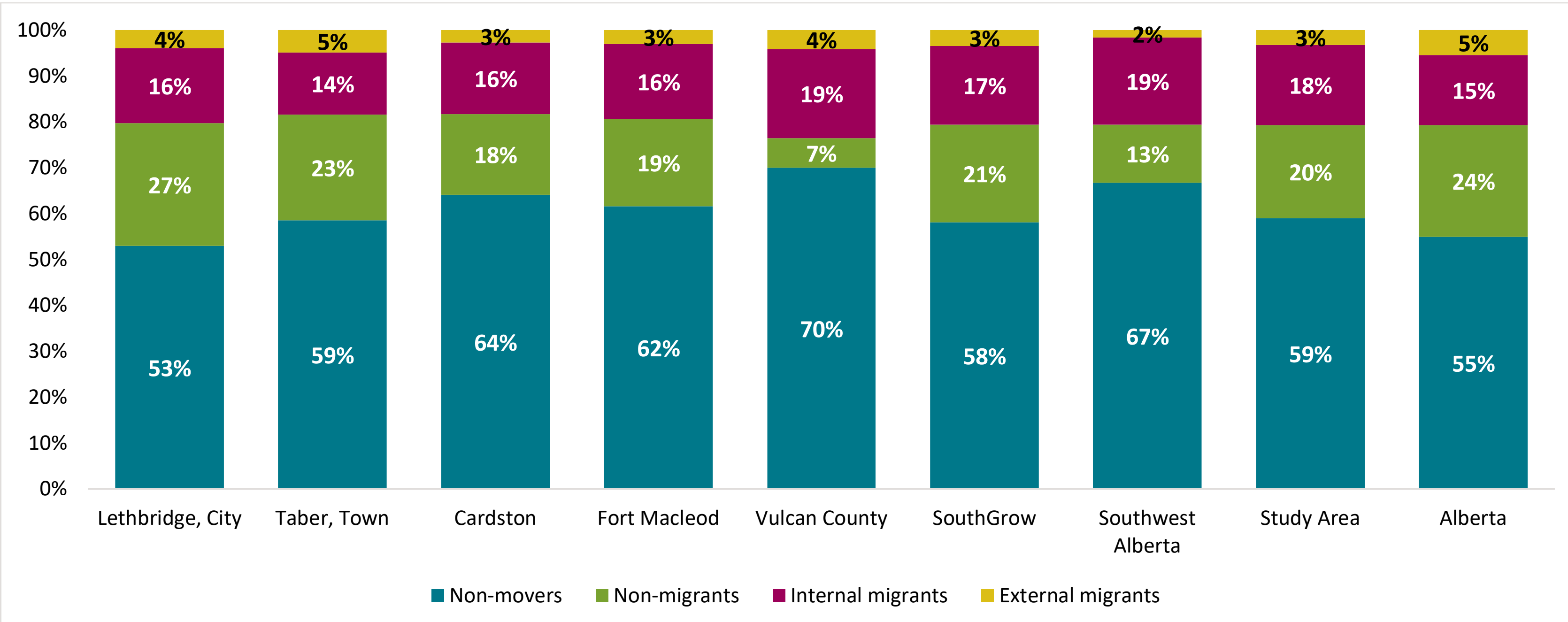
Field of Study	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
No postsecondary certificate, diploma or degree	47%	65%	45%	56%	58%	51%	49%	50%	44%
Education	4%	3%	8%	5%	3%	4%	5%	4%	4%
Visual and performing arts, and communications technologies	2%	1%	2%	1%	0%	2%	2%	2%	2%
Humanities	2%	1%	1%	2%	1%	2%	2%	2%	2%
Social and behavioural sciences and law	5%	2%	3%	3%	2%	4%	3%	4%	5%
Business, management and public administration	10%	6%	9%	7%	9%	9%	8%	9%	11%
Physical and life sciences and technologies	2%	1%	2%	0%	1%	2%	1%	2%	2%
Mathematics, computer and information sciences	2%	0%	1%	1%	0%	1%	1%	1%	2%
Architecture, engineering, and related technologies	10%	9%	10%	12%	11%	10%	12%	10%	14%
Agriculture, natural resources and conservation	2%	2%	2%	1%	5%	2%	3%	3%	2%
Health and related fields	10%	7%	13%	11%	9%	9%	10%	9%	8%
Personal, protective and transportation services	4%	3%	3%	3%	2%	4%	4%	4%	3%
Other fields of study	0%	0%	0%	0%	0%	0%	0%	0%	0%

Source: Manifold Data Mining Inc.

2.1.5 Mobility

The movement of people within a community or to the community from somewhere else constitutes mobility. Statistics Canada tracks this in two ways, by asking if a household has moved within the past year and asking if a household has moved within the past five years. According to Manifold Data Mining calculations, most people in all the geographies analyzed had either stayed where they were five years earlier or moved somewhere in the same geography. By 2018, Vulcan County recorded the largest share of migrants at almost 24%.

Figure 13: Mobility characteristics five years ago, 2018



Source: Manifold Data Mining Inc.

2.1.6 Labour Force

According to the standard definition employed by Statistics Canada, the employed are persons having a job or business. In contrast, the unemployed are without work, are available for work, and are actively seeking employment. Together the unemployed and the employed constitute the labour force[3]. In 2018, a total of 108,2981 people in the Study Area were participating in the labour force; this represents almost 4% of Alberta's labour force. Due to data limitation in several of the communities in the study, labour force growth calculations were only possible for the city of Lethbridge, the Town of Taber and the province. The first two communities experienced a labour force growth of 19% and 7%, respectively; both communities grew below the increase experienced by Alberta at 21%.

Figure 14: Labour force size, 2011-2018

Period	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Labour force 2018	57,163	4,751	1,583	1,456	2,172	94,669	19,551	108,281	2,559,960
Labour force 2011	47,960	4,425	Not available	Not available	Not available	72,785	9,420	80,455	2,115,640
% Change	19%	7%	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	21%

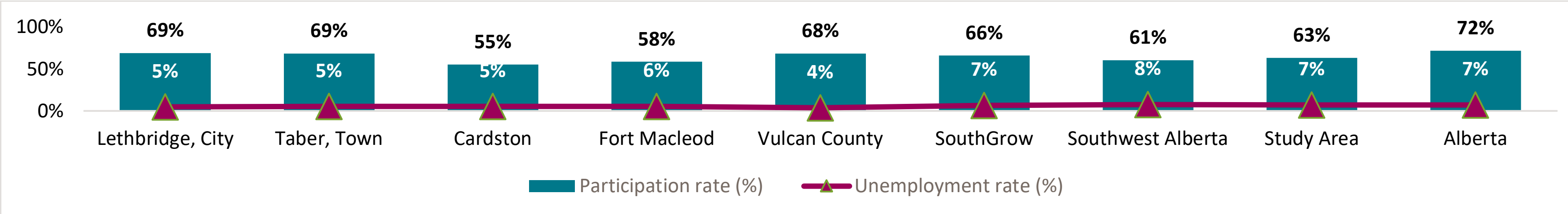
Source: Statistics Canada, 2011 National Household Survey | Manifold Data Mining Inc.

Note: Highlighted figures have been calculated using data from limited communities. Do not use for labour growth analysis

In 2018, participation rates in the SouthGrow Region and Southwest Alberta reached 66% and 61%, respectively. All comparators were below the provincial participation rate at 72%. In terms of the unemployment rate, most of the census subdivisions used as comparators recorded lower unemployment rated compared to the broader areas (SouthGrow, Southwest Alberta, Alberta). Vulcan County recorded the lowest unemployment rate in 2018 at 4%.

[3] Statistics Canada. Retrieved on January 7, 2019 from < https://www150.statcan.gc.ca/n1/pub/81-004-x/def/4153361-eng.htm>

Figure 15: Labour force status, percentage of population, 2018



Source: Manifold Data Mining Inc.

Turning to the class of worker, over 85% of the labour force in the Study Area work as employees. Nevertheless, in Vulcan County, 39% of the labour force work self-employed; this is more than three times the provincial share.

Figure 16: Class of worker ratio, 2018

	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Employees	89%	87%	84%	86%	60%	85%	78%	85%	86%
Self-employed	10%	12%	14%	12%	39%	13%	20%	15%	12%

Source: Manifold Data Mining Inc.

2.1.7 Commuting Patterns

The Study on commuting patterns measures the import and export characteristics of a region's workforce. A high percentage of the outside labour force working in the community depicts the attraction of the region for nearby communities. In contrast, if the majority of the workers in the community leave for their work (export of labour force), then it may hint towards a lack of proportional opportunities in the community.

In the Study Area, most of the employed labour force commutes within the same census subdivision of residence (e.g. people living and working in the city of Lethbridge). The share is lower for Southwest Alberta at 50%, for this area, 25% of the employed labour force commute to a different census subdivision within the same census division (e.g. people with residence in the Town of Taber and work in the city of Lethbridge. Both communities located within Division No. 2).

Vulcan County recorded the largest share of the labour force (44%) who commute to a different census subdivision and census division (e.g. people with residence in Vulcan who work in Stavely. One community located in Division No. 5, and the other located in Division No. 3).

Figure 17: Commuting destination for the employed labour force

Journey to work	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area	Alberta
Commute within census subdivision (CSD) of residence	87%	75%	77%	67%	14%	71%	50%	68%	73%
Commute to a different census subdivision (CSD) within census division (CD) of residence	9%	23%	15%	11%	41%	23%	25%	23%	22%
Commute to a different census subdivision (CSD) and census division (CD) within province or territory of residence	3%	2%	7%	21%	44%	6%	19%	7%	4%
Commute to a different province or territory	1%	0%	0%	1%	1%	1%	5%	1%	1%

Source: Statistics Canada. 2016 Census

While the labour force by industry data provides information on the type of industry where a community's population is employed, it does not indicate if the labour force is employed in industries within the community or if they commute outside the community to work. The commuting patterns indicate where the community's labour force lives and works.

In Figures 1, 4, 7, 10 and 12, the first column indicates the resident of the community is working in the community. The second column (indicated as A in the table) indicates the number of residents 'working outside' community while the third column (indicated as B in the table) indicates the number of jobs held by non-residents working in the community. When interpreting the table, if (B-A) is positive, it suggests a community is a net importer of workers; more people commute into the community to work in it than leave it. Conversely, if (B-A) is negative, it indicates a community is a net exporter of workers; more people leave the community to work than enter it for work.

Lethbridge

Approximately 33,865 residents work in Lethbridge. Most of these residents perform jobs in Lethbridge's health care and social assistance, retail trade and accommodation and food services. Approximately 5,125 Lethbridge residents work outside Lethbridge (A). Resident's travel to communities outside Lethbridge to work in their manufacturing, public administration and educational services sectors. Lethbridge attracts approximately 6,940 people from outside communities (B). Health care and social assistance, retail trade and manufacturing sectors are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, Lethbridge is a net importer of workers. While commuter outflow accounts for 5,125 residents, commuter inflow represents 6,940 people. Lethbridge has a net import of 1,815 workers. The industries that import the most workers from other communities include health care and social assistance, retail trade and accommodation and food services.

Figure 18: Net Export (-)/Net Import (+) of Labour by Industry, Lethbridge 2016

Industry	Live and Work in Lethbridge	Live in Lethbridge Commute to other community (A)	Commute to Lethbridge, Live in Other Community (B)	Net import/export
Total	33,865	5,125	6,940	1,815
Agriculture, forestry, fishing and hunting	320	355	130	-225
Mining, quarrying, and oil and gas extraction	60	280	0	-280
Utilities	170	35	90	55
Construction	1480	285	515	230
Manufacturing	2885	735	655	-80
Wholesale trade	880	320	315	-5
Retail trade	5745	295	945	650
Transportation and warehousing	740	300	255	-45
Information and cultural industries	455	0	80	80
Finance and insurance	1120	70	205	135
Real estate and rental and leasing	495	10	115	105
Professional, scientific and technical services	1505	200	345	145
Management of companies and enterprises	30	10	20	10
Admin. and support, waste mgmt. and remediation services	945	100	170	70
Educational services	3555	535	520	-15
Health care and social assistance	5825	480	1340	860
Arts, entertainment and recreation	625	145	120	-25
Accommodation and food services	3450	115	455	340
Other services (except public administration)	1790	150	405	255
Public administration	1795	635	380	-255

Source: Statistics Canada, 2016 Census of Population.

The majority of residents' commute to work in Lethbridge County (42% of the commuting workforce), followed by Coaldale (10% of the commuting workforce) and the Town of Taber (7.92% of the commuting workforce).

Figure 19: Place of Work for Residents of Lethbridge 2016

Communities	Number of Residents	% of the total
Commuting Workforce	5125	100%
Lethbridge County MD	2170	42%
Coaldale T	535	10%
Taber T	275	5%
Calgary CY	210	4%
Fort MacLeod T	195	4%

Source: Statistics Canada, 2016 Census of Population.

A large portion of the non-residents who work in Lethbridge are from Coaldale (24% of total) and Lethbridge County (20% of total) and Coalhurst (10% of total).

Figure 20: Place of Residence for Workers who Commute to Lethbridge to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	6940	100%
Coaldale T	1655	24%
Lethbridge County MD	1370	20%
Coalhurst T	695	10%
Raymond T	465	7%
Magrath T	265	4%

Source: Statistics Canada, 2016 Census of Population.

Town of Taber

Approximately 2,365 residents work in the Town of Taber. Most of these residents perform jobs in the Town of Taber's Retail trade, Manufacturing, Health care and social assistance. Approximately 780 of the Town of Taber residents work outside the Town of Taber (A). Resident's travel to communities outside the Town Taber to work in their manufacturing, retail trade and educational services sectors. The Town of Taber attracts approximately 1,275 people from outside communities (B). Manufacturing, educational services and healthcare and social assistance are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, the Town of Taber is a net importer of workers. While commuter outflow accounts for 780 residents, commuter inflow represents 1,275 people. The Town of Taber has a net import of 495 workers. The industries that import the most workers from other communities include health care and social assistance, educational services and manufacturing.

Figure 21: Net Export (-)/Net Import (+) of Labour by Industry, Town of Taber 2016

Industry	Live and Work in Taber	Live in Town of Taber Commute to other community (A)	Commute to Town of Taber, Live in Other Community (B)	Net import/export
Total	2,365	780	1,275	495
Agriculture, forestry, fishing and hunting	90	40	110	70
Mining, quarrying, and oil and gas extraction	80	45	40	-5
Utilities	15	10	10	0
Construction	40	25	35	10
Manufacturing	340	155	210	55
Wholesale trade	130	30	70	40
Retail trade	430	100	110	10
Transportation and warehousing	90	45	60	15
Information and cultural industries	15	20	10	-10
Finance and insurance	25	15	45	30
Real estate and rental and leasing	20	0	10	10
Professional, scientific and technical services	80	10	55	45
Management of companies and enterprises	0	0	0	0
Admin. and support, waste mgmt. and remediation services	45	10	30	20
Educational services	150	90	155	65
Health care and social assistance	250	60	135	75
Arts, entertainment and recreation	15	10	10	0
Accommodation and food services	280	15	50	35
Other services (except public administration)	180	60	90	30
Public administration	105	30	75	45

Source: Statistics Canada, 2016 Census of Population.

The majority of residents commute to work in Taber MD (51% of the commuting workforce), followed by Lethbridge (28% of the commuting workforce) and Lethbridge County (4% of the commuting workforce).

Figure 22: Place of Work for Residents of The Town of Taber 2016

Communities	Number of Residents	% of the total
Commuting Workforce	780	100%
Taber MD	395	51%
Lethbridge CY	220	28%
Lethbridge County MD	35	4%
Bow Island T	30	4%
Coaldale T	25	3%

Source: Statistics Canada, 2016 Census of Population.

A large portion of the non-residents who work in the Town of Taber are from Taber MD (44% of total) and Lethbridge (22% of total) and Coaldale (10% of total).

Figure 23: Place of Residence for Workers who Commute to The Town of Taber to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	1275	100%
Taber MD	555	44%
Lethbridge CY	275	22%
Coaldale T	130	10%
Barnwell VL	115	9%
Vauxhall T	40	3%

Source: Statistics Canada, 2016 Census of Population.

Cardston

Approximately 785 residents work in Cardston. Most of these residents perform jobs in Cardston's retail trade, educational services, health care and social assistance. Approximately 245 Cardston residents work outside Cardston (A). Resident's travel to communities outside Cardston to work in their educational services, public administration and health care and social assistance sectors. Cardston attracts approximately 555 people from outside communities (B). Retail trade educational services and healthcare and social assistance are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, Cardston is a net importer of workers. While commuter outflow accounts for 245 residents, commuter inflow represents 555 people. Cardston has a net import of 310 workers. The industries that import the most workers from other communities include retail trade educational services and healthcare and social assistance.

Figure 24: Net Export (-)/Net Import (+) of Labour by Industry, Cardston 2016

Industry	Live and Work in Cardston	Live in Cardston Commute to other community (A)	Commute to Cardston, Live in Other Community (B)	Net import/export
Total	785	245	555	310
Agriculture, forestry, fishing and hunting	10	10	45	35
Mining, quarrying, and oil and gas extraction	0	0	0	0
Utilities	10	0	0	0
Construction	10	20	40	20
Manufacturing	40	20	20	0
Wholesale trade	10	0	10	10
Retail trade	105	20	60	40
Transportation and warehousing	10	0	0	0
Information and cultural industries	0	0	0	0
Finance and insurance	20	20	10	-10
Real estate and rental and leasing	10	0	10	10
Professional, scientific and technical services	20	10	15	5
Management of companies and enterprises	0	0	0	0
Admin. and support, waste mgmt. and remediation services	30	20	20	0
Educational services	145	25	90	65
Health care and social assistance	185	45	155	110
Arts, entertainment and recreation	15	10	10	0
Accommodation and food services	45	0	10	10
Other services (except public administration)	35	0	35	35
Public administration	65	25	20	-5

Source: Statistics Canada, 2016 Census of Population.

The majority of residents commute to work in Blood 148 IRI (33% of the commuting workforce), followed by Lethbridge (24% of the commuting workforce) and Cardston County (8% of the commuting workforce).

Figure 25: Place of Work for Residents of Cardston 2016

Communities	Number of Residents	% of the total
Commuting Workforce	245	100%
Blood 148 IRI	80	33%
Lethbridge CY	60	24%
Cardston County MD	20	8%
Fort MacLeod T	20	8%
Magrath T	15	6%

Source: Statistics Canada, 2016 Census of Population.

A large portion of the non-residents who work in Cardston are from Cardston County (52% of total) and Lethbridge (14% of total) and Blood 148 (9% of total).

Figure 26: Place of Residence for Workers who Commute to Cardston to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	555	100%
Cardston County MD	290	52%
Lethbridge CY	80	14%
Blood 148	50	9%
Magrath T	30	5%
Calgary CY	15	3%

Source: Statistics Canada, 2016 Census of Population.

Fort MacLeod

Approximately 675 residents work in Fort MacLeod. Most of these residents perform jobs in Fort MacLeod's manufacturing, retail trade and healthcare and social assistance. Approximately 330 Fort MacLeod residents work outside Fort MacLeod (A). Resident's travel to communities outside Fort MacLeod to work in their manufacturing, educational services and health care and social assistance sectors. Fort MacLeod attracts approximately 915 people from outside communities (B). Agriculture, forestry, fishing and hunting, manufacturing and healthcare and social assistance are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, Fort MacLeod is a net importer of workers. While commuter outflow accounts for 330 residents, commuter inflow represents 915 people. Fort MacLeod has a net import of 585 workers. The industries that import the most workers from other communities include retail trade, manufacturing and agriculture, forestry, fishing and hunting.

Figure 27: Net Export (-)/Net Import (+) of Labour by Industry, Fort MacLeod 2016

Industry	Live and Work in Fort MacLeod	Live in Fort MacLeod Commute to other community (A)	Commute to Fort MacLeod, Live in Other Community (B)	Net import/export
Total	675	330	915	585
Agriculture, forestry, fishing and hunting	15	10	135	125
Mining, quarrying, and oil and gas extraction	0	30	10	-20
Utilities	0	0	0	0
Construction	35	20	70	50
Manufacturing	85	40	145	105
Wholesale trade	15	10	20	10
Retail trade	115	10	80	70
Transportation and warehousing	30	10	45	35
Information and cultural industries	20	0	10	10
Finance and insurance	15	20	20	0
Real estate and rental and leasing	10	20	10	-10
Professional, scientific and technical services	15	0	10	10
Management of companies and enterprises	0	0	0	0
Admin. and support, waste mgmt. and remediation services	10	10	30	20
Educational services	50	35	55	20
Health care and social assistance	125	100	100	0
Arts, entertainment and recreation	15	10	25	15
Accommodation and food services	75	20	10	-10
Other services (except public administration)	15	10	50	40
Public administration	30	10	40	30

Source: Statistics Canada, 2016 Census of Population.

The majority of residents commute to work in Lethbridge (35% of the commuting workforce), followed by Claresholm (14% of the commuting workforce) and Lethbridge County (11% of the commuting workforce).

Figure 28: Place of Work for Residents of Fort MacLeod 2016

Communities	Number of Residents	% of the total
Commuting Workforce	330	100%
Lethbridge CY	115	35%
Claresholm T	45	14%
Lethbridge County MD	35	11%
Pincher Creek T	20	6%
Blood 148 IRI	20	6%

Source: Statistics Canada, 2016 Census of Population.

Figure 12 shows the commuting patterns of workers who commute to Fort MacLeod to work. A large portion of the non-residents who work in Fort MacLeod are from Willow Creek No. 26 (33% of total) and Lethbridge (21% of total) and Edmonton (5% of total).

Figure 29: Place of Residence for Workers who Commute to Fort MacLeod to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	915	100%
Willow Creek No. 26 MD	305	33%
Lethbridge CY	195	21%
Edmonton CY	50	5%
Claresholm T	40	4%
Lethbridge County MD	35	4%

Source: Statistics Canada, 2016 Census of Population.

Vulcan County

Approximately 110 residents work in Vulcan County. Most of these residents perform jobs in Vulcan County's agriculture, forestry, fishing and hunting, accommodation and food services and mining, quarrying, and oil and gas extraction sectors. Approximately 690 Vulcan County residents work outside Vulcan County (A). Resident's travel to communities outside Vulcan County to work in their agriculture, forestry, fishing and hunting, manufacturing and health care and social assistance sectors. Vulcan County attracts approximately 175 people from outside communities (B). Agriculture, forestry, fishing and hunting, wholesale trade and educational services are the top three sectors that attract the greatest number of people.

Considering the net flow of labour, Vulcan County is a net exporter of workers. While commuter inflow accounts for 175 residents, commuter outflow represents 690 people. Vulcan County has a net export of 515 workers. The industries that export the most workers to other communities include health care and social assistance, agriculture, forestry, fishing and hunting and manufacturing.

Figure 30: Net Export (-)/Net Import (+) of Labour by Industry, Vulcan County 2016

Industry	Live and Work in Vulcan County	Live in Vulcan County Commute to other community (A)	Commute to Vulcan County, Live in Other Community (B)	Net import/export
Total	110	690	175	-515
Agriculture, forestry, fishing and hunting	55	125	50	-75
Mining, quarrying, and oil and gas extraction	10	20	10	-10
Utilities	0	0	0	0
Construction	0	50	0	-50
Manufacturing	0	75	0	-75
Wholesale trade	0	25	20	-5
Retail trade	0	65	10	-55
Transportation and warehousing	0	30	0	-30
Information and cultural industries	0	0	0	0
Finance and insurance	0	10	10	0
Real estate and rental and leasing	10	20	0	-20
Professional, scientific and technical services	0	50	10	-40
Management of companies and enterprises	0	0	0	0
Admin. and support, waste mgmt. and remediation services	0	0	0	0
Educational services	0	30	30	0
Health care and social assistance	0	105	0	-105
Arts, entertainment and recreation	0	0	0	0
Accommodation and food services	20	50	10	-40
Other services (except public administration)	0	30	0	-30
Public administration	0	25	0	-25

Source: Statistics Canada, 2016 Census of Population.

The majority of residents commute to work in Lethbridge (35% of the commuting workforce), followed by Claresholm (14% of the commuting workforce) and Lethbridge County (11% of the commuting workforce).

Figure 31: Place of Work for Residents of Vulcan County 2016

Communities	Number of Residents	% of the total
Commuting Workforce	690	100%
Vulcan T	190	28%
Calgary CY	120	17%
Nanton T	45	7%
Wheatland County MD	45	7%
Foothills No. 31 MD	40	6%

Source: Statistics Canada, 2016 Census of Population.

A large portion of the non-residents who work in Vulcan County are from Willow Creek No. 26 (33% of total) and Lethbridge (21% of total) and Edmonton (5% of total).

Figure 32: Place of Residence for Workers who Commute to Vulcan County to Work, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	175	100%
Vulcan T	30	17%
Wheatland County MD	20	11%
Milo VL	15	9%
Arrowwood VL	15	9%
Foothills No. 31 MD	15	9%

Source: Statistics Canada, 2016 Census of Population.

2.1.8 Business Counts

A business characteristics assessment was completed to study the number and type of businesses in the SouthGrow Region, Southwest Region, Lethbridge, Taber, Cardston, Fort MacLeod and Vulcan County. Specifically, these businesses were profiled total employee numbers, size of business establishments by employees and businesses by industry.

Notes on Data

Statistics Canada's Canadian Business Counts Data provides a record of business establishments by industry and size. This data is collected from the Canada Revenue Agency (CRA). The business data collected for Port Alberni include all local businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to CRA; or
- Have a minimum of $30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The SouthGrow region includes the following 28 communities:

- Warner County No. 5
- Coutts
- Milk River
- Warner
- Raymond
- Stirling
- Lethbridge County
- Lethbridge
- Coalhurst
- Nobleford
- Barons
- Coaldale
- Taber MD
- Taber
- Barnwell
- Vauxhall
- Cardston County
- Magrath
- Cardston
- Claresholm
- Blood 148
- Vulcan County
- Carmangay
- Champion
- Vulcan
- Lomond
- Milo
- Arrowwood

Due to the availability of data from Statistics Canada's Canadian Business Counts Milk River, Barnwell, Vauxhall, Carmangay, champion, milo and Arrowwood showed counts of zero for all business types.

The SouthWest region includes the following 16 communities:

- Cardston County
- Improvement District No. 4 Waterton
- Cardston
- Glenwood
- Hill Spring
- Pincher Creek No. 9
- Pincher Creek
- Cowley
- Willow Creek No. 26
- Fort MacLeod
- Granum
- Claresholm
- Stavely
- Nanton
- Crowsnest Pass
- Ranchland No. 66

Due to the availability of data from Statistics Canada's Canadian Business Counts Glenwood, Hill Spring, Cowley, Granum, Stavely and Ranchland No. 66 showed counts of zero for all business types.

The Study Area is a combination of the SouthGrow and Southwest regions and is made up of all 41 communities. While Claresholm, Cardston Cardston County are in both the SouthGrow and SouthWest regions that were only accounted for once in calculating the Study Area.

Interpreting the Data

Canadian business counts are compiled from the Business Register, Statistics Canada's central listing of Canadian businesses. The Canadian Business Counts Data records business counts by "Total" and "Subtotal" categories. It should be noted that the Canadian Business Counts Data uses the CRA as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than $30,000 are not included. The population of these small, unincorporated businesses is thought to be in the range of 600,000 in all of Canada.

There are some considerations when analyzing and interpreting the data.

As changes to the Business Register's methodology or business industrial classification strategies can bring about increases or decreases in the number of active businesses, it is important to study the data as a percentage of total businesses rather than focus on absolute numbers.

Statistics Canada also specifies that the business counts are based on the statistical concept of "location"—that is, each operating location is separately counted, including cases where one business comprises multiple locations. For example, a retail business with ten stores represents ten businesses in the Canadian business counts.

Canadian Business Counts Data includes all registered companies that have a Goods and Services Tax number, as registered through the Canada Revenue Agency. Results should not be compared directly to existing business directories in the regions in the study as the criteria for registering are different for both. The Canadian Business Counts data are used so that comparisons can be made to the Provincial Distribution of businesses across the same categories.

Local Concentration by Location Quotient (LQ)

An LQ measures the concentration of employment and business activity in a local area relative to an over-arching area.

An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist

Study Area Key Business Characteristics

A detailed review of the business counts data was studied using the Canadian Business Counts. As of December 2018, approximately 25,731 businesses were registered in the Study Area. These include businesses classified by industry (24,041 businesses) and those unclassified (1,690 businesses). The figure bellows the total businesses in the Study Area alongside a breakdown of businesses without employees and with employees.

Of the 25,731 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 70 percent of businesses in the Study Area are sole-proprietors (without employees), and the other 30 percent of businesses employ at least 1-4 people.

Figure 33: Study Area Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	25731	17937	7794	4291	1510	1055	645	175	77	30	11
Unclassified	1690	1361	329	255	44	20	8	0	2	0	0
Sub-total, classified	24041	16576	7465	4036	1466	1035	637	175	75	30	11
Agriculture, forestry, fishing and hunting	5435	4521	914	630	138	83	54	7	2	0	0
Mining, quarrying, and oil and gas extraction	314	180	134	96	15	11	9	3	0	0	0
Utilities	67	43	24	8	5	6	3	2	0	0	0
Construction	2494	1547	947	578	203	100	48	13	5	0	0
Manufacturing	441	198	243	84	34	47	44	15	12	6	1
Wholesale trade	628	262	366	143	88	80	47	6	2	0	0
Retail trade	1501	577	924	288	287	220	84	32	9	4	0
Transportation and warehousing	1252	848	404	257	61	43	27	10	4	2	0
Information and cultural industries	173	90	83	31	29	7	12	3	1	0	0
Finance and insurance	1315	1035	280	163	54	39	20	2	2	0	0
Real estate and rental and leasing	3665	3392	273	224	20	18	7	3	1	0	0
Professional, scientific and technical services	1773	1141	632	467	86	53	18	3	3	2	0
Management of companies and enterprises	213	175	38	23	5	2	5	2	1	0	0
Administrative and support, waste management and remediation services	713	454	259	129	57	40	24	7	0	2	0
Educational services	191	123	68	22	17	8	10	1	1	1	8
Health care and social assistance	1326	675	651	361	104	79	51	28	20	7	1
Arts, entertainment and recreation	276	174	102	33	19	18	22	6	3	1	0
Accommodation and food services	619	186	433	86	97	112	114	19	4	1	0
Other services (except public administration)	1598	952	646	406	142	61	29	5	1	2	0
Public administration	47	3	44	7	5	8	9	8	4	2	1

Source: Canadian Business Counts, December 2018 (Note: highlighted figures have been calculated using data from limited communities)

SouthGrow Region Key Business Characteristics

A detailed review of the business counts data was studied using the Canadian Business Counts. As of December 2018, approximately 21,824 businesses were registered in the SouthGrow Region. These include businesses classified by industry (20,338 businesses) and those unclassified (1,436 businesses). Figure 34 shows the total businesses in the SouthGrow Region alongside a breakdown of businesses without employees and with employees.

Of the 21,824 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 69 percent of businesses in the SouthGrow Region are sole-proprietors (without employees), and the other 31 percent of businesses employ at least 1-4 people.

Figure 34: SouthGrow Region Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	21,824	15,115	6,709	3,658	1,291	917	578	159	67	29	10
Unclassified	1,436	1,153	283	222	37	15	8	0	1	0	0
Sub-total, classified	20,388	13,962	6,426	3,436	1,254	902	570	159	66	29	10
Agriculture, forestry, fishing and hunting	4,400	3,622	778	531	119	69	50	7	2	0	0
Mining, quarrying, and oil and gas extraction	275	160	115	85	13	9	7	1	0	0	0
Utilities	50	35	15	5	2	4	3	1	0	0	0
Construction	2,101	1,284	817	492	173	86	48	13	5	0	0
Manufacturing	360	152	208	69	29	40	38	14	11	6	1
Wholesale trade	559	229	330	122	78	77	45	6	2	0	0
Retail trade	1,247	469	778	224	242	195	76	29	8	4	0
Transportation and warehousing	1,088	734	354	220	56	40	23	10	3	2	0
Information and cultural industries	132	64	68	24	25	6	9	3	1	0	0
Finance and insurance	1,175	924	251	149	47	32	19	2	2	0	0
Real estate and rental and leasing	3,256	3,015	241	198	19	14	6	3	1	0	0
Professional, scientific and technical services	1,506	944	562	412	78	46	18	3	3	2	0
Management of companies and enterprises	188	157	31	19	4	2	4	1	1	0	0
Admin. and support, waste mgmt. and remediation services	608	388	220	109	46	36	20	7	0	2	0
Educational services	175	113	62	20	16	7	9	1	1	1	7
Health care and social assistance	1,184	598	586	330	97	66	46	22	17	7	1
Arts, entertainment and recreation	222	141	81	26	13	15	18	6	2	1	0
Accommodation and food services	485	134	351	64	68	99	99	18	2	1	0
Other services (except public administration)	1,340	797	543	331	124	54	26	5	1	2	0
Public administration	37	2	35	6	5	5	6	7	4	1	1

Source: Canadian Business Counts, December 2018 (Note: highlighted figures have been calculated using data from limited communities)

Southwest Region Key Business Characteristics

A detailed review of the business counts data was studied using the Canadian Business Counts. As of December 2018, approximately 5,713 businesses were registered in the Southwest Region. These include businesses classified by industry (5,348 businesses) and those unclassified (1,693 businesses). The figure below shows the total businesses in the Southwest Region alongside a breakdown of businesses without employees and with employees. Of the 5,713 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 73 percent of businesses in the Southwest Region are sole-proprietors (without employees), and the other 27 percent of businesses employ at least 1-4 people.

Figure 35: Southwest Region Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	5,713	4,191	1,522	890	298	196	95	27	11	3	2
Unclassified	365	294	71	52	9	7	2	0	1	0	0
Sub-total, classified	5,348	3,897	1,451	838	289	189	93	27	10	3	2
Agriculture, forestry, fishing and hunting	1,693	1,485	208	155	29	19	5	0	0	0	0
Mining, quarrying, and oil and gas extraction	58	30	28	17	2	4	3	2	0	0	0
Utilities	25	14	11	4	3	2	1	1	0	0	0
Construction	509	345	164	110	38	16	0	0	0	0	0
Manufacturing	107	60	47	20	7	10	8	1	1	0	0
Wholesale trade	101	49	52	29	15	6	2	0	0	0	0
Retail trade	366	171	195	79	58	39	12	6	1	0	0
Transportation and warehousing	211	145	66	48	6	6	4	1	1	0	0
Information and cultural industries	52	30	22	10	6	3	3	0	0	0	0
Finance and insurance	213	165	48	24	12	10	2	0	0	0	0
Real estate and rental and leasing	605	564	41	33	3	4	1	0	0	0	0
Professional, scientific and technical services	360	258	102	80	14	8	0	0	0	0	0
Management of companies and enterprises	29	22	7	4	1	0	1	1	0	0	0
Admin. and support, waste mgmt. and remediation services	140	90	50	28	12	6	4	0	0	0	0
Educational services	24	15	9	4	1	1	1	0	0	0	2
Health care and social assistance	220	120	100	47	14	16	10	8	4	1	0
Arts, entertainment and recreation	71	44	27	10	7	3	6	0	1	0	0
Accommodation and food services	186	70	116	32	36	22	21	3	2	0	0
Other services (except public administration)	363	219	144	103	24	11	5	0	0	1	0
Public administration	15	1	14	1	1	3	4	4	0	1	0

Source: Canadian Business Counts, December 2018 (Note: highlighted figures have been calculated using data from limited communities)

Lethbridge Key Business Characteristics

A detailed review of the business counts data was studied using the Canadian Business Counts. As of December 2018, approximately 10,250 businesses were registered in Lethbridge. These include businesses classified by industry (9,451 businesses) and those unclassified (799 businesses). Figure 36 shows the total businesses in the Lethbridge alongside a breakdown of businesses without employees and with employees. Of the 10,250 businesses classified by industry, the greatest number of businesses are found in real estate and rental and leasing, construction and health care and social assistance. Approximately 64 percent of businesses in Lethbridge are sole-proprietors (without employees), and the other 36 percent of businesses employ at least 1-4 people.

Figure 36: Lethbridge Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	10,250	6,607	3,643	1,803	706	573	373	110	51	19	8
Unclassified	799	637	162	123	24	11	3	0	1	0	0
Sub-total, classified	9,451	5,970	3,481	1,680	682	562	370	110	50	19	8
Agriculture, forestry, fishing and hunting	322	290	32	20	2	7	3	0	0	0	0
Mining, quarrying, and oil and gas extraction	63	38	25	17	3	2	2	1	0	0	0
Utilities	8	4	4	1	1	1	1	0	0	0	0
Construction	1,063	625	438	253	87	47	34	12	5	0	0
Manufacturing	195	62	133	44	18	24	23	11	8	4	1
Wholesale trade	268	95	173	66	36	38	27	5	1	0	0
Retail trade	793	240	553	143	173	144	58	23	8	4	0
Transportation and warehousing	350	228	122	67	17	21	11	4	2	0	0
Information and cultural industries	80	40	40	9	16	3	8	3	1	0	0
Finance and insurance	727	559	168	102	25	23	15	1	2	0	0
Real estate and rental and leasing	1,971	1,807	164	129	13	13	5	3	1	0	0
Professional, scientific and technical services	976	574	402	284	55	39	16	3	3	2	0
Management of companies and enterprises	118	92	26	15	3	2	4	1	1	0	0
Admin. and support, waste mgmt. and remediation services	359	214	145	64	30	26	16	7	0	2	0
Educational services	109	73	36	10	12	2	7	0	0	0	5
Health care and social assistance	842	441	401	236	68	44	25	11	12	4	1
Arts, entertainment and recreation	140	85	55	16	5	13	13	5	2	1	0
Accommodation and food services	308	69	239	27	37	76	81	15	2	1	0
Other services (except public administration)	755	433	322	177	81	37	20	5	1	1	0
Public administration	4	1	3	0	0	0	1	0	1	0	1

Source: Canadian Business Counts, December 2018

Town of Taber Key Business Characteristics

As of December 2018, approximately 1,482 businesses were registered in the Town of Taber. These include businesses classified by industry (1,373 businesses) and those unclassified (109 businesses). Figure 37 shows the total businesses in the Town of Taber alongside a breakdown of businesses without employees and with employees. Of the 1,482 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 67 percent of businesses in the Town of Taber are sole-proprietors (without employees), and the other 33 percent of businesses employ at least 1-4 people.

Figure 37: Town of Taber Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100+
Total	1,482	991	491	250	98	74	50	12	7
Unclassified	109	93	16	14	0	0	2	0	0
Sub-total, classified	1,373	898	475	236	98	74	48	12	7
Agriculture, forestry, fishing and hunting	195	160	35	14	9	5	4	3	0
Mining, quarrying, and oil and gas extraction	75	39	36	27	3	3	3	0	0
Utilities	4	1	3	1	0	2	0	0	0
Construction	157	92	65	34	15	9	7	0	0
Manufacturing	25	9	16	2	1	5	4	1	3
Wholesale trade	49	18	31	9	8	9	5	0	0
Retail trade	73	29	44	12	14	10	6	2	0
Transportation and warehousing	143	100	43	27	4	5	5	2	0
Information and cultural industries	6	1	5	1	3	1	0	0	0
Finance and insurance	64	52	12	5	3	3	1	0	0
Real estate and rental and leasing	198	184	14	11	2	1	0	0	0
Professional, scientific and technical services	108	68	40	32	6	1	1	0	0
Management of companies and enterprises	15	15	0	0	0	0	0	0	0
Administrative and support, waste management and remediation services	37	24	13	6	5	1	1	0	0
Educational services	12	4	8	2	2	2	1	0	1
Health care and social assistance	52	27	25	13	2	3	3	3	1
Arts, entertainment and recreation	8	5	3	2	0	0	1	0	0
Accommodation and food services	32	6	26	6	7	8	4	1	0
Other services (except public administration)	118	64	54	32	14	6	2	0	0
Public administration	2	0	2	0	0	0	0	0	2

Source: Canadian Business Counts, December 2018

Cardston Key Business Characteristics

As of December 2018, approximately 622 businesses were registered in Cardston. These include businesses classified by industry (576 businesses) and those unclassified (46 businesses). Figure 38 shows the total businesses in Cardston alongside a breakdown of businesses without employees and with employees. Of the 622 businesses classified by industry, the greatest number of businesses are found in agriculture, forestry, fishing and hunting, construction and retail trade. Approximately 72 percent of businesses in Cardston are sole-proprietors (without employees), and the other 28 percent of businesses employ at least 1-4 people.

Figure 38: Cardston Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100+
Total	622	447	175	95	36	23	13	5	3
Unclassified	46	35	11	10	1	0	0	0	0
Sub-total, classified	576	412	164	85	35	23	13	5	3
Agriculture, forestry, fishing and hunting	120	111	9	7	1	1	0	0	0
Mining, quarrying, and oil and gas extraction	7	5	2	0	0	1	1	0	0
Utilities	6	5	1	0	0	0	1	0	0
Construction	58	34	24	17	5	2	0	0	0
Manufacturing	10	4	6	1	2	2	1	0	0
Wholesale trade	14	7	7	5	2	0	0	0	0
Retail trade	55	36	19	6	5	4	3	1	0
Transportation and warehousing	9	4	5	5	0	0	0	0	0
Information and cultural industries	6	2	4	2	1	1	0	0	0
Finance and insurance	34	25	9	5	3	1	0	0	0
Real estate and rental and leasing	77	72	5	4	1	0	0	0	0
Professional, scientific and technical services	42	28	14	11	2	1	0	0	0
Management of companies and enterprises	3	3	0	0	0	0	0	0	0
Administrative and support, waste management and remediation services	13	9	4	3	0	1	0	0	0
Educational services	3	1	2	1	0	0	0	0	1
Health care and social assistance	47	26	21	7	7	2	3	1	1
Arts, entertainment and recreation	8	5	3	2	0	0	1	0	0
Accommodation and food services	25	10	15	4	3	5	2	1	0
Other services (except public administration)	37	25	12	5	3	2	1	0	1
Public administration	2	0	2	0	0	0	0	2	0

Source: Canadian Business Counts, December 2018

Fort MacLeod Key Business Characteristics

As of December 2018, approximately 779 businesses were registered in Ford MacLeod. These include businesses classified by industry (719 businesses) and those unclassified (60 businesses). Figure 39 shows the total businesses in Ford MacLeod alongside a breakdown of businesses without employees and with employees. Of the 779 businesses classified by industry, the greatest number of businesses are found in agriculture, forestry, fishing and hunting, construction and retail trade. Approximately 72 percent of businesses in Ford MacLeod are sole-proprietors (without employees), and the other 28 percent of businesses employ at least 1-4 people.

Figure 39: Fort MacLeod Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100+
Total	779	561	218	119	46	29	17	5	2
Unclassified	60	51	9	6	3	0	0	0	0
Sub-total, classified	719	510	209	113	43	29	17	5	2
Agriculture, forestry, fishing and hunting	203	181	22	15	3	3	1	0	0
Mining, quarrying, and oil and gas extraction	2	1	1	0	0	1	0	0	0
Utilities	5	4	1	0	0	0	0	1	0
Construction	88	60	28	15	9	4	0	0	0
Manufacturing	14	4	10	2	2	1	4	0	1
Wholesale trade	21	8	13	8	4	0	1	0	0
Retail trade	52	20	32	15	9	5	2	1	0
Transportation and warehousing	50	29	21	14	4	1	2	0	0
Information and cultural industries	5	3	2	2	0	0	0	0	0
Finance and insurance	31	26	5	3	0	2	0	0	0
Real estate and rental and leasing	73	66	7	7	0	0	0	0	0
Professional, scientific and technical services	30	23	7	5	1	1	0	0	0
Management of companies and enterprises	8	5	3	2	0	0	1	0	0
Administrative and support, waste management and remediation services	19	12	7	4	2	1	0	0	0
Educational services	4	2	2	0	0	0	1	0	1
Health care and social assistance	34	23	11	2	1	4	2	2	0
Arts, entertainment and recreation	8	4	4	1	0	2	1	0	0
Accommodation and food services	26	11	15	8	4	0	2	1	0
Other services (except public administration)	45	27	18	10	4	4	0	0	0
Public administration	1	1	0	0	0	0	0	0	0

Source: Canadian Business Counts, December 2018

Vulcan County Key Business Characteristics

As of December 2018, approximately 738 businesses were registered in Vulcan County. These include businesses classified by industry (718 businesses) and those unclassified (20 businesses). Figure 40 shows the total businesses in Vulcan County alongside a breakdown of businesses without employees and with employees. Of the 738 businesses classified by industry, the greatest number of business are found in agriculture, forestry, fishing and hunting, real estate and rental and leasing and construction. Approximately 77 percent of businesses in Vulcan County are sole-proprietors (without employees), and the other 23 percent of businesses employ at least 1-4 people.

Figure 40: Vulcan County Business Counts, 2018

Sectors	Total Businesses	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100+
Total	779	561	218	119	46	29	17	5	2
Unclassified	60	51	9	6	3	0	0	0	0
Sub-total, classified	719	510	209	113	43	29	17	5	2
Agriculture, forestry, fishing and hunting	203	181	22	15	3	3	1	0	0
Mining, quarrying, and oil and gas extraction	2	1	1	0	0	1	0	0	0
Utilities	5	4	1	0	0	0	0	1	0
Construction	88	60	28	15	9	4	0	0	0
Manufacturing	14	4	10	2	2	1	4	0	1
Wholesale trade	21	8	13	8	4	0	1	0	0
Retail trade	52	20	32	15	9	5	2	1	0
Transportation and warehousing	50	29	21	14	4	1	2	0	0
Information and cultural industries	5	3	2	2	0	0	0	0	0
Finance and insurance	31	26	5	3	0	2	0	0	0
Real estate and rental and leasing	73	66	7	7	0	0	0	0	0
Professional, scientific and technical services	30	23	7	5	1	1	0	0	0
Management of companies and enterprises	8	5	3	2	0	0	1	0	0
Administrative and support, waste management and remediation services	19	12	7	4	2	1	0	0	0
Educational services	4	2	2	0	0	0	1	0	1
Health care and social assistance	34	23	11	2	1	4	2	2	0
Arts, entertainment and recreation	8	4	4	1	0	2	1	0	0
Accommodation and food services	26	11	15	8	4	0	2	1	0
Other services (except public administration)	45	27	18	10	4	4	0	0	0
Public administration	1	1	0	0	0	0	0	0	0

Source: Canadian Business Counts, December 2018

2.1.9 Business Counts LQ

An LQ measures the concentration of employment and business activity in a local area relative to an over-arching area.

An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist

The location quotients analysis (Figure 41) for the business sector in Lethbridge, Taber, Cardston, Fort MacLeod, Vulcan County, SouthGrow Region, SouthWest Region and Study Area are individually compared to the average Alberta community. The following sectors were found to have a high concentration of businesses relative to the province.

- **Lethbridge**: Retail trade, health care and social assistance and real estate and rental and leasing among others highlighted in green in figure 41
- **Town of Taber:** Mining, quarrying, and oil and gas extraction, utilities and transportation and warehousing among others highlighted in green in figure 41
- **Cardston:** Utilities, agriculture, forestry, fishing and hunting and public administration among others highlighted in green in figure 41
- **Fort MacLeod:** Utilities, agriculture, forestry, fishing and hunting, accommodation and food services and retail trade
- **Vulcan County:** Agriculture, forestry, fishing and hunting, utilities, public administration and mining, quarrying, and oil and gas extraction
- **SouthGrow Region:** Agriculture, forestry, fishing and hunting and Utilities
- **Southwest Alberta:** Agriculture, forestry, fishing and hunting, utilities, public administration, accommodation and food services
- **Study Area:** Agriculture, forestry, fishing and hunting and Utilities and construction

Figure 41: Location Quotient by Industry Businesses (NAICS), All Regions, 2018

Sectors	Lethbridge, City	Taber, Town	Cardston	Fort MacLeod	Vulcan County	SouthGrow	Southwest Alberta	Study Area
Agriculture, forestry, fishing and hunting	0.39	1.63	2.38	3.22	7.74	2.49	3.66	2.61
Mining, quarrying, and oil and gas extraction	0.27	2.25	0.50	0.11	1.51	0.56	0.45	0.54
Utilities	0.59	2.04	7.27	4.84	6.13	1.73	3.30	1.96
Construction	0.91	0.93	0.82	0.99	0.33	0.85	0.78	0.85
Manufacturing	1.14	1.01	0.96	1.08	0.24	0.99	1.12	1.03
Wholesale trade	1.18	1.50	1.02	1.22	0.43	1.16	0.80	1.11
Retail trade	1.47	0.94	1.68	1.27	0.15	1.09	1.22	1.11
Transportation and warehousing	0.63	1.77	0.27	1.18	0.42	0.92	0.68	0.90
Information and cultural industries	1.09	0.56	1.34	0.89	0.57	0.84	1.27	0.94
Finance and insurance	1.33	0.81	1.02	0.75	0.25	1.01	0.70	0.96
Real estate and rental and leasing	1.41	0.98	0.91	0.69	0.82	1.09	0.77	1.04
Professional, scientific and technical services	0.70	0.54	0.50	0.28	0.18	0.51	0.47	0.51
Management of companies and enterprises	1.30	1.14	0.54	1.16	N/A	0.97	0.57	0.93
Administrative and support, waste management and remediation services	0.95	0.68	0.57	0.66	0.15	0.76	0.67	0.75
Educational services	1.06	0.81	0.48	0.51	0.81	0.80	0.42	0.74
Health care and social assistance	1.45	0.62	1.34	0.77	0.05	0.96	0.68	0.91
Arts, entertainment and recreation	1.26	0.50	1.19	0.95	0.25	0.94	1.15	0.99
Accommodation and food services	1.20	0.86	1.60	1.33	0.38	0.89	1.30	0.96
Other services (except public administration)	1.09	1.17	0.88	0.85	0.50	0.91	0.94	0.92
Public administration	0.26	0.90	2.15	0.86	3.62	1.13	1.76	1.22

Source: Canadian Business Counts, December 2018 (Note: highlighted figures have been calculated using data from limited communities)

3. Southern Alberta Occupation Requirements

metroeconomics prepared this section of the report. It assesses the number of jobs expected to be created in the Lethbridge area between 2020 and 2025 from both an industrial and occupational perspective. Projections are provided for the number of new positions to be filled due both to economic expansion and to worker retirements over that span. Economic demand projections by industry and occupation have been developed for each of the following five individual municipalities (the Census refers to them as Census Sub-Divisions or CSDs):

- the City of Lethbridge
- the Town of Taber
- the Town of Cardston
- the Town of Fort MacLeod
- Vulcan County

Economic demand projections by industry and occupation have also been developed for SouthGrow Region as a whole and Southwest Alberta as a whole. SouthGrow Region includes the following 28 CSDs:

Figure 42: SouthGrow CSD Definition

CSD#	CSD Name	CSD Type
4802001	Warner County No. 5	Municipal district
4802002	Coutts	Village
4802004	Milk River	Town
4802006	Warner	Village
4802008	Raymond	Town
4802009	Stirling	Village
4802011	Lethbridge County	Municipal district
4802012	Lethbridge	City
4802013	Coalhurst	Town
4802014	Nobleford	Village
4802016	Barons	Village
4802019	Coaldale	Town
4802021	Taber	Municipal district
4802022	Taber	Town
4802023	Barnwell	Village
4802029	Vauxhall	Town
4803001	Cardston County	Municipal district
4803002	Magrath	Town
4803004	Cardston	Town
4803022	Claresholm	Town
4803802	Blood 148	Indian reserve
4805001	Vulcan County	Municipal district
4805002	Carmangay	Village
4805004	Champion	Village
4805006	Vulcan	Town
4805008	Lomond	Village
4805009	Milo	Village
4805011	Arrowwood	Village

South West Alberta includes the following 16 CSDs:

Figure 43: South West Alberta CSD Definition

CSD#	CSD Name	CSD Type
4803001	Cardston County	Municipal district
4803003	Improvement District No. 4 Waterton	Improvement district
4803004	Cardston	Town
4803006	Glenwood	Village
4803008	Hill Spring	Village
4803011	Pincher Creek No. 9	Municipal district
4803014	Pincher Creek	Town
4803016	Cowley	Village
4803018	Willow Creek No. 26	Municipal district
4803019	Fort MacLeod	Town
4803021	Granum	Town
4803022	Claresholm	Town
4803024	Stavely	Town
4803026	Nanton	Town
4815007	Crowsnest Pass	Specialized municipality
4815045	Ranchland No. 66	Municipal district

Considerable overlap exists across these geographic definitions. SouthGrow Region includes 4 of the five separately identified CSDs (shaded) while Southwest Alberta includes 2 of them (also shaded).

And the Town of Cardston appears in all three lists (not shaded).

From this point forward, all the CSDs mentioned above, excluding any double-counting, will be referred to collectively as the Study Area. Total economic demand projections are provided for each of:

- the five separate CSDs
- South Grow Region as a whole
- South West Alberta as a whole
- the Study Area as a whole

Economic demand and retiree replacement projections by detailed occupation are summarized in this report for the Study Area as a whole. Microsoft Excel files containing greater details are attached.

3.1.1 The Economy of the Study Area

The Study Area in 2016 was home to 198,568 people. Employers in the area provided a total of 77,080 jobs. Thus, the area provides an average of 388 jobs for every 1,000 residents, a ratio lower than the 442 jobs per 1,000 residents prevailing province-wide.

Based on a Location Quotient (LQ) assessment of employment by industry by place-of-work in 2016 for the Study Area compared to Alberta as a whole (Figure 40), 16,229 of the area's 77,080 jobs are economic base jobs (or 21 percent of the total) and the remaining 60,851 are community base jobs.

Figure 44: Study Area Employment by Place-of-Work by Major Industry in 2016 - Location Quotient Decomposition into Economic and Community Base Jobs

	Study Area		Alberta		Job Types	
					Economic Base	Community Base
	Number	Per 1,000	Number	Per 1,000		
Total population	198,568		4,067,175			
Total employment by place-of-work	77,080	388	1,796,530	442	16,229	60,851
Agriculture, other primary	7,645	39	55,750	14	7,645	0
Mining, oil and gas	725	4	99,045	24	725	0
Utilities	415	2	18,090	4	0	415
Construction	3,550	18	108,320	27	0	3,550
Manufacturing	6,015	30	107,260	26	6,015	0
Wholesale trade	2,400	12	68,785	17	0	2,400
Retail trade	9,855	50	222,695	55	0	9,855
Transportation, warehousing	2,235	11	75,810	19	0	2,235
Information, culture	840	4	27,345	7	0	840
Finance, insurance	3,245	16	98,505	24	0	3,245
Professional, scientific, technical services	3,420	17	136,670	34	0	3,420
Other business services	2,135	11	57,585	14	0	2,135
Education	7,110	36	131,365	32	696	6,414
Health, social services	12,030	61	222,895	55	1,148	10,882
Arts, entertainment, recreation	1,525	8	36,910	9	0	1,525
Accommodation, food	5,795	29	135,195	33	0	5,795
Other services	3,860	19	86,985	21	0	3,860
Government	4,280	22	107,320	26	0	4,280

Source: Statistics Canada and *metroeconomics*

Economic base jobs support the overall economy. Growth in economic base jobs can lead to overall growth. Community base jobs support the needs of the local population.[4] The economic base of the Study Area is primarily defined by agriculture and other primary activities (in this case other primary means forestry) (7,645 jobs), manufacturing (6,015) and mining and oil and gas (725) with a few exportable service jobs in health care and social services (1,148) and education (696).

Figure 45 indicates where within the Study Area, the 77,080 jobs are located and provide details regarding those industries within manufacturing that account for most of its jobs. The final column in Figure 41 repeats the first data column in Figure 40. It excludes any double counting across the Area.

The highlights of Figure 45 include the following:

- Lethbridge accounts for 92,729 residents or 47 percent of the Study Area's total
- Lethbridge accounts for 43,365 jobs or 56 percent of the Study Area's total
- South Grow accounts for 168,971 residents and 67,575 jobs (85 and 88 percent respectively of the Study Area's totals)
- South West accounts for 36,149 residents and 12,630 jobs (18 and 16 percent respectively)

[4] The Location Quotient procedure and the terms economic base and community are explained in greater detail in the accompanying appendix.

Figure 45: Study Area Employment by Place-of-Work by Major Industry in 2016 - Selected Geographic Areas within the Study Area

	Lethbridge	Taber	Cardston	Fort MacLeod	Vulcan County	Sum of the 5	South Grow	South West	Study Area
Population	92,729	8,428	3,585	2,967	3,984	111,693	168,971	36,149	198,568
Employed by place of residence (EPOR)	47,705	4,035	1,320	1,280	1,570	55,910	79,235	15,710	92,345
Employed by place of work (EPOW)	43,365	3,870	1,405	1,720	860	51,220	67,575	12,630	77,080
Agriculture, forestry	565	230	45	150	610	1,600	5,750	2,090	7,645
Mining, oil and gas	95	125	0	15	30	265	530	210	725
Utilities	250	20	10	0	0	280	390	35	415
Construction	2,150	90	75	145	15	2,475	3,235	535	3,550
Manufacturing	3,615	560	60	250	20	4,505	5,585	740	6,015
Wholesale trade	1,260	205	25	50	20	1,560	2,215	260	2,400
Retail trade	6,920	540	170	215	10	7,855	8,840	1,400	9,855
Transportation, warehousing	1,010	185	15	80	10	1,300	2,040	290	2,235
Information, culture	625	20	0	25	0	670	780	85	840
Finance, insurance	2,290	95	45	50	20	2,500	2,885	455	3,245
Professional, scientific, technical services	2,230	170	50	25	10	2,485	3,025	470	3,420
Other business services	1,290	75	60	40	10	1,475	1,930	305	2,135
Education	4,225	325	220	105	30	4,905	6,475	960	7,110
Health, social services	7,420	425	370	255	10	8,480	10,515	2,140	12,030
Arts, entertainment, recreation	825	20	25	50	0	920	1,140	460	1,525
Accommodation, food	4,000	340	50	105	30	4,525	5,050	900	5,795
Other services	2,360	285	85	70	25	2,825	3,395	620	3,860
Government	2,235	160	100	90	10	2,595	3,795	675	4,280
Manufacturing	3,615	560	60	250	20	4,505	5,585	740	6,015
Food	1,390	425	0	120	0	1,935	2,355	280	2,515
Beverage and tobacco product	120	45	0	0	0	165	190	10	200
Textile mills	0	0	10	0	0	10	10	10	10
Textile product mills	10	0	0	0	0	10	10	10	20
Clothing	0	0	0	0	0	0	0	0	0
Leather and allied product	0	0	0	0	0	0	0	10	10
Wood product	255	10	15	55	0	335	360	120	410
Paper	0	10	0	0	10	20	30	10	40
Printing and related support activities	65	0	0	0	0	65	85	0	85
Petroleum and coal products	15	0	0	15	10	40	35	50	70
Chemical	55	0	0	0	0	55	65	0	65
Plastics and rubber products	95	0	0	0	0	95	115	30	145
Non-metallic mineral product	110	20	15	0	0	145	235	35	255
Primary metal	195	0	0	10	0	205	205	10	205
Fabricated metal product	590	30	10	10	0	640	750	60	790
Machinery	95	10	0	30	0	135	190	75	235
Computer and electronic product	30	0	0	0	0	30	30	0	30
Electrical equipment, appliance and component	25	0	0	0	0	25	25	10	35
Transportation equipment	285	0	10	10	0	305	435	20	435
Furniture and related product	130	0	0	0	0	130	215	0	215
Miscellaneous	150	10	0	0	0	160	245	0	245

Source: Statistics Canada and *metroeconomics*

Manufacturing accounts for 37 percent of the Study Area's economic base jobs:

- Lethbridge accounts for 60 percent of the Study Area's manufacturing jobs while South Grow Area accounts for 93 percent and South West Alberta for 12 percent
- Manufacturing's 6,015 Study Area job base is diversified with food leading the way (2,515) followed by fabricated metal products (790), transportation equipment (435), wood products (410), non-metallic mineral products (255), miscellaneous products (245), machinery (235), furniture and related products (215), primary metals (205) and beverages and tobacco (200)

3.1.2 Projected Employment Growth 2020 to 2025 by Area

Figure 46 tabulates the projected changes in employment throughout the Study Area between 2020 and 2025 geographically. The jobs for 2020 are estimated by *metroeconomics,* while the jobs for 2025 are projected drawing on *metroeconomics*' detailed CSD level estimates and projection system.

Figure 46: Study Area Employment by Place-of-Work by Area - Estimated for 2020 and Projected for 2025

Geography	2020	2025	Change 2020-2025
Study Area	82,241	86,388	4,147
Lethbridge	47,047	51,205	4,158
Taber	4,078	4,137	59
Cardston	1,423	1,413	-10
Fort MacLeod	1,695	1,681	-14
Vulcan County	837	839	2
Sum of the 5	55,080	59,275	4,195
SouthGrow	71,135	75,242	4,107
Southwest	12,529	12,560	31

Source: *metroeconomics*

Over 2020 to 2025, the total number employed across the Study Area as a whole is projected to grow from 82,241 to 86,388 or by 4,147. Jobs across the selected five municipalities as a group are projected to grow by 4,195 with that growth distributed among the five as follows:

- jobs in Lethbridge are projected to grow by 4,158
- jobs in the Town of Taber are projected to grow by 59
- jobs in Cardston are projected to decline by 10
- jobs in Fort MacLeod are projected to decline by 14
- jobs in Vulcan County are projected to increase by 2

Employment across the 28 municipalities that define South Grow Region is projected to grow by 4,107, while employment across the 16 CSDs that define South West Alberta is projected to grow by 31.

On balance, Figure 46 shows that Lethbridge accounts for the lion's share of the job gains expected between 2020 and 2025 across the Study Area.

3.1.3 Projected Employment Growth 2020 to 2025 by Major Industry

Figure 47 tabulates the changes in employment projected throughout the Study Area between 2020 and 2025 by major industry. The jobs are estimated and projected by *metroeconomics'* detailed CSD level estimates and projection system.

Figure 47: Study Area Employment by Place-of-Work by Major Industry - Estimated for 2020 and Projected for 2025

Industry	2020	2025	Change 2020-2025
Total all industries	82,241	86,388	4,147
Agriculture, forestry	7,289	7,386	97
Mining, oil and gas	784	806	22
Utilities	539	665	126
Construction	3,685	3,715	30
Manufacturing	7,390	7,387	-2
Wholesale trade	2,562	2,665	103
Retail trade	10,064	10,283	219
Transportation, warehousing	2,513	2,769	255
Information, culture	864	896	32
Finance, insurance	2,119	1,989	-130
Real estate and rental and leasing	1,210	1,415	204
Professional, scientific, technical services	3,432	3,397	-36
Other business services	2,280	2,551	271
Education	7,812	8,509	697
Health, social services	13,199	14,311	1,111
Arts, entertainment, recreation	1,631	1,736	105
Accommodation, food	6,188	6,636	448
Other services	3,690	3,505	-185
Government	4,990	5,769	779

Source: *metroeconomics*

Over the 2020 to 2025 period, jobs across the Study Area as a whole are projected to grow from 82,241 to 86,388 or by 4,147. The job changes projected for each of the 19 major industries over that span include the following:

- health care and social services up 1,111
- government up 779
- education up 697
- accommodation and food up 448
- other business services up 271
- transportation and warehousing up 255
- retail trade up 219
- real estate and rental and leasing up 204
- utilities up 126
- arts, entertainment and recreation up 105
- wholesale trade up 103
- agriculture and forestry up 97

Modest gains are projected for:

- information and culture up 32
- construction up 30
- mining and oil and gas up 22

Several major employers are expected to witness modest job declines, including:

- manufacturing down by 2
- professional, scientific and technical services down 36
- finance and insurance down 130
- other services down 185

The gains and losses above projected for each of the 19 2-digit NAICS industries are summations of projections for employment for each of 300 detailed industries at the 4-digit NAICS level.

3.1.4 Study Area Projected Detailed Occupation Requirements 2020 to 2025

The detailed employment by industry projections for the Study Area as a whole and each of the seven constituent sub-areas discussed above was transformed into *economic demand* projections for each of the 500 occupations identified in the National Occupation Classification System (NOCS).

Estimates were made, as well, of the number of people likely to retire from each of the 500 occupations within the Study Area as a whole over 2020 to 2025. Each retiree will need to be replaced if all 86,388 jobs projected for the Study Area as a whole for 2025 are to be filled. The *retiree replacement demand*, therefore, is equal to the expected number of retirees over the 2020 to 2025 span.

The total number of recruits required for each occupation between 2020 and 2025 is equal to the *economic demand* plus the *retiree replacement demand*. A Microsoft Excel file covering these two demand categories for the Study Area as a whole over the 2020 to 2025 period accompanies this report.

Figure 44 summarizes that table by ranking the 50 occupations representing the greatest recruitment challenges over the 2020 to 2025 span across the Study Area as a whole. The highlights of Exhibit 5 include the following:

- 4,147 new jobs will be created due to economic expansion
- another 4,227 workers are projected to retire over that period
- thus, the total recruitment challenge is 8,347 against a base of 82,241 employed in 2020
- the total recruitment challenge equals just over 10 percent of all the jobs in 2020
- the top 50 jobs account for two-thirds of the entire recruitment effort faced by the area
- the greatest challenge (426 total recruits) is posed by managers in agriculture (NOCS# 821)
- the second greatest (275) is posed by retail salespersons (6421)
- the third (234) is posed by nurse aides, orderlies, etc. (3413)
- the fourth (232) is posed by registered nurses, etc. (3012)
- the fifth (210) is posed by food counter attendants, etc. (6711)

These top 5 occupations collectively account for 16 percent of the total recruitment challenge faced by the Study Area. The top 27 occupations account for more than 50 percent of the total challenge.

Figure 48: Study Area Projected Detailed Occupation Requirements - Economic Demand and Retiree Replacement Demand 2020 to 2025

Rank	NOC #	Occupations	Employed 2020	Employed 2025	Economic Demand	Retirees 20-25	Total Demand
		Total all 500 occupations	82,241	86,388	4,147	4,227	8,374
1	821	Managers in agriculture	3,396	3,434	38	388	426
2	6421	Retail salespersons	3,262	3,340	78	197	275
3	3413	Nurse aides, orderlies and patient service associates	1,827	1,971	144	90	234
4	3012	Registered nurses and registered psychiatric nurses	1,846	1,996	150	82	232
5	6711	Food counter attendants, kitchen helpers and related support occupations	2,243	2,408	165	45	210
6	621	Retail and wholesale trade managers	2,457	2,515	58	139	197
7	4032	Elementary school and kindergarten teachers	1,452	1,584	132	62	194
8	7511	Transport truck drivers	1,256	1,353	97	93	190
9	6733	Janitors, caretakers and building superintendents	1,125	1,216	91	89	180
10	1221	Administrative officers	1,313	1,392	79	81	160
11	1411	General office support workers	1,272	1,357	85	73	159
12	1241	Administrative assistants	1,211	1,282	71	84	155
13	4413	Elementary and secondary school teacher assistants	1,146	1,251	105	46	151
14	8431	General farm workers	2,223	2,253	30	118	147
15	6731	Light duty cleaners	953	1,034	80	50	131
16	4212	Social and community service workers	1,107	1,191	84	45	129
17	6322	Cooks	1,169	1,255	86	33	119
18	1311	Accounting technicians and bookkeepers	1,076	1,101	25	93	117
19	6232	Real estate agents and salespersons	358	433	75	40	115
20	4031	Secondary school teachers	699	765	66	33	98
21	1414	Receptionists	862	919	57	41	98
22	7512	Bus drivers, subway operators and other transit operators	391	439	48	49	97
23	8612	Landscaping and grounds maintenance labourers	633	699	67	28	95
24	4011	University professors and lecturers	487	532	45	45	90
25	6513	Food and beverage servers	1,077	1,156	80	6	86
26	6611	Cashiers	1,338	1,373	36	46	82
27	1111	Financial auditors and accountants	696	719	23	52	75
28	4214	Early childhood educators and assistants	642	695	53	21	74
29	631	Restaurant and food service managers	664	715	51	21	72

Rank	NOC #	Occupations	Employed 2020	Employed 2025	Economic Demand	Retirees 20-25	Total Demand
30	3233	Licensed practical nurses	618	665	46	23	69
31	4021	College and other vocational instructors	426	457	32	35	67
32	6541	Security guards and related security service occupations	355	395	41	24	65
33	6552	Other customer and information services representatives	574	604	30	30	60
34	4412	Home support workers, housekeepers and related occupations	445	476	30	26	57
35	4311	Police officers (except commissioned)	341	394	53	3	57
36	1224	Property administrators	217	247	30	27	56
37	1431	Accounting and related clerks	515	538	22	32	54
38	714	Facility operation and maintenance managers	340	364	23	26	49
39	6622	Store shelf stockers, clerks and order fillers	836	845	10	39	49
40	5254	Program leaders and instructors in recreation, sport and fitness	428	464	36	9	45
41	4012	Post-secondary teaching and research assistants	361	394	32	13	45
42	7452	Material handlers	678	702	24	20	44
43	3414	Other assisting occupations in support of health services	388	417	29	13	42
44	3411	Dental assistants	295	324	29	12	40
45	6311	Food service supervisors	444	477	33	7	40
46	1521	Shippers and receivers	468	481	13	27	40
47	4153	Family, marriage and other related counsellors	279	302	24	15	39
48	4152	Social workers	285	313	27	12	39
49	7321	Automotive service technicians, truck and bus mechanics and mechanical repairers	810	817	7	31	38
50	3112	General practitioners and family physicians	279	304	24	13	38

Source: *metroeconomics*

3.1.5 Economic and Community Base Jobs

Employment by industry in any given area can be decomposed into economic base jobs (those that drive the overall economy) and community base jobs (those that serve the local population). The population growth of an area typically depends on its potential for growth in economic base employment, while an area's growth in community base employment depends on its population growth. In recognition of this interdependence between population and employment growth, *metroeconomics* has developed a community-based projection system that takes account of the economic and demographic factors influencing an area's growth potential. The system takes these factors into account as follows:

- the economic base of the community is identified through the de-composition of local jobs on a place of work basis by industry into those that are *economic base* jobs and those that are *community base* jobs; this is achieved using a location quotient process
- economic base industries produce goods and services consumed primarily by businesses or people outside of the local community; these industries – also called export-based industries – produce agriculture, mining or manufactured products for consumption elsewhere or provide tourism or higher-order education/health care services to visitors/temporary residents
- the potential for growth of a local community's economic base jobs is identified through assessing how many such jobs exist today and how many might exist in the future drawing on *metroeconomics*' extensive forecasts of economic base industrial job trends nation-wide and province-wide
- an assessment is also made of the potential for residents to commute to jobs in nearby employment locations drawing on existing patterns and *metroeconomics*' base case forecasts of such jobs by sub-provincial area across the country
- the potential for job growth within the local area and job growth in nearby locations determines the potential for job growth among residents
- the *metroeconomics* system ties this resident job growth potential to the demographic side of the community; if potential job growth among residents exceeds the current supply of workers (based on age and gender assessment of the current population, age-specific rates of labour force participation, the level of unemployment, and the need to replace retiring workers), in-migration occurs; thus job growth potential determines population growth potential recognizing that each new job-holding resident typically brings along one or two dependents
- the system further takes into account the fact that each new resident job-holder increases the need for workers who service the local population – the community base jobs – and that these additional community base jobs, in turn, create the need for more workers, more residents, etc.
- employed residents growth, in other words, drives the community's net in-migration requirements which, along with standard assumptions regarding fertility and mortality rates, provide the parameters needed to develop local area population projections by age and gender
- projected economic base jobs by industry are added to projected community base jobs by industry to determine the total number of jobs by place of work that will exist in the community in the decades ahead

The Location Quotient procedure is carried out as follows:

- All jobs in agriculture and forestry, mining and oil and gas extraction, and manufacturing are considered to be economic base jobs as most of their production is consumed by businesses and people outside of the area
- For all other industries, the number of jobs per 1,000 residents in the Calgary CMA is compared to that ratio across all 32 CMAs in Canada as a group. Where the ratio in an industry in the CMA exceeds that of all CMAs, it is assumed the excess jobs in the Calgary CMA are providing services to people or businesses outside of the CMA. These excess jobs are defined as export-based service jobs and their output as exportable services, Expand on the region,

4. Labour Demand and Supply Assessment

4.1 Introduction

The real-time Jobs Demand Report's intelligence-gathering system provides ongoing monitoring of online job postings with extensive quality assurance to analyze and compile each local job demand report. The Data Warehouse and Reporting Engine allow for the monitoring of the on-line local job market within the province of Alberta. This technology permits the extraction of relevant information about each online job posting, including but not limited to the following metrics:

- Job Location
- Employer and employer industry (NAICS)
- Occupational Category (NOCS)

All labour demand and labour supply data provided in the following sections correspond to the job posting and job seekers published between **March 1, 2019, to February 29, 2020.** This report presents data for the following geographies:

- SouthGrow Region (Alberta)
- Southwest Alberta
- Study Area (aggregate of SouthGrow and Southwest Alberta)

4.2 Summary of Key Findings

- A total of 9,190 job postings and 9,152 job seekers were recorded in the study area between March 1, 2019, to February 29, 2020.
- The labour demand and supply trends were mostly driven by those in the SouthGrow Region. The city of Lethbridge itself accounted for 72% of job postings and 77% of job seekers.
- Healthcare and social assistance was the industry sector, with the most significant number of job postings. On the other hand, accommodation and food services recorded the most significant number of job seekers.
- Occupations in sales and services recorded the most significant number of job seekers and job postings in the study area.
- Most of the job postings tracked require at least a college diploma or certification. At the same time, most job seekers said to have a college diploma or certification.
- Skills in demand include:
  - General/soft skills: communication and customer services.
  - Specialized skills: sales and office administration.
  - Technologies: Microsoft office package
  - Tools and equipment: Forklifts and power tools.

4.2.1 Labour Demand and Supply Trends

Between March 1, 2019, and February 29, 2020, a total of 9,190 job postings were published in the study area. Most of these jobs were posted on the employer corporate websites, followed by Indeed.ca and Service Canada Jobbank.

Figure 49: Total job postings by data source – March 1, 2019, to February 29, 2020

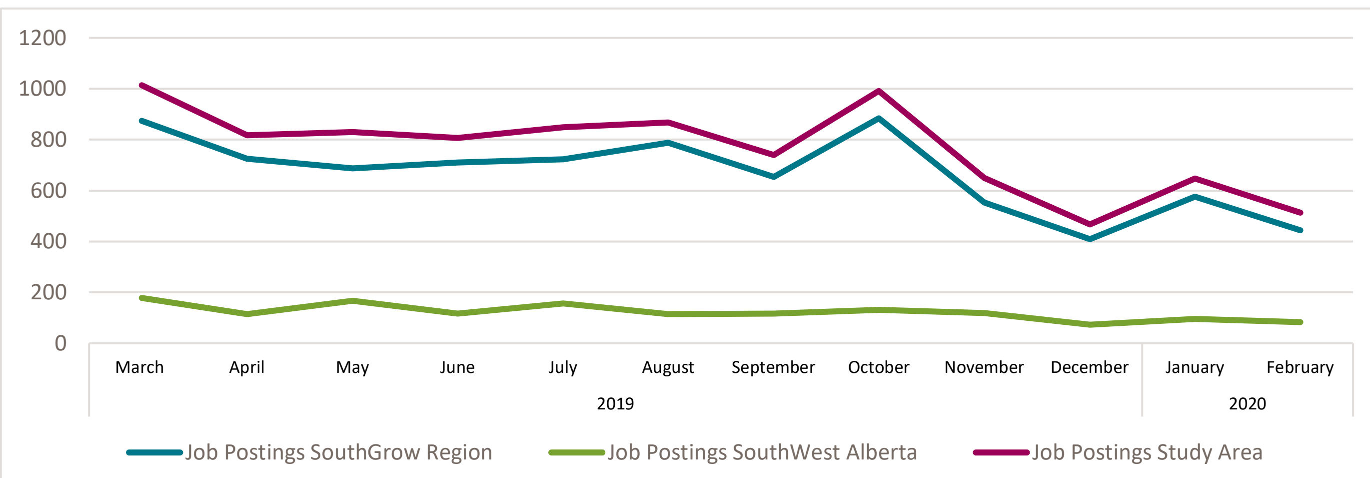
Data Source	Study Area	%
Employer Corporate Websites	4,888	53%
HCareers.ca	1	0%
Indeed	2,581	28%
JobServe	325	4%
Monster	314	3%
Service Canada Jobbank	1,081	12%
Grand Total	9,190	

Source: Vicinity Jobs

The figure below shows the job postings by month. In the study area, March 2019 had the most significant number of job postings (1,014 postings. Meanwhile, December 2019 had the lowest quantity of job postings (467 postings). The figure also evidences that most of the job postings were driven by the job posting trends in the SouthGrow Region.

The SouthGrow Region recorded a total of 8,023 job postings, and Southwest Alberta recorded a total of 1,466 job postings.

Figure 50: Total job postings by month – March 1, 2019, to February 29, 2020

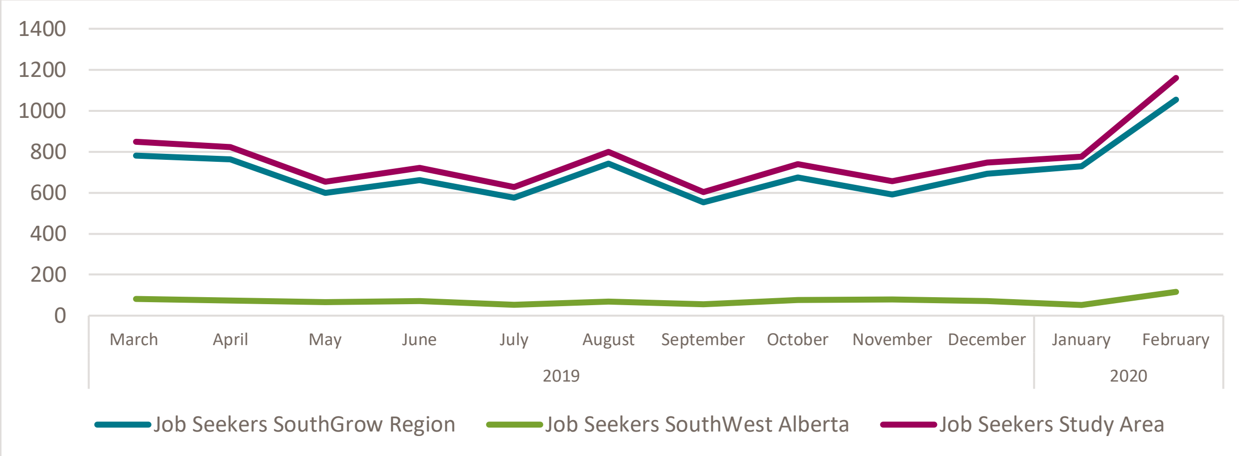


Source: Vicinity Jobs

In terms of job seekers, the study area recorded a total of 9,152 job seekers. Most of these job seekers were concentrated in the SouthGrow Region (8,415 job seekers). Southwest Alberta recorded a total of 867 job seekers.

The study area recorded the most significant number of job seekers in February 2020. Meanwhile, the month with the lowest quantity of job seekers was September 2019. Similar trend lines are observed between job seekers in the study area and the SouthGrow Region.

Figure 51: Total job seekers by month – March 1, 2019, to February 29, 2020



Source: Vicinity Jobs

4.2.2 Labour Demand and Supply by Location

In terms of specific locations, the city of Lethbridge recorded the most significant number of both job postings and job seekers in the whole study area. This community recorded 72% of job postings and 77% of job seekers in the study area.

Figure 52: Job posting and job seekers by location – March 1, 2019, to February 29, 2020

	Study Area			
Location	**Postings**	**%**	**Seekers**	**%**
Lethbridge, City	6,597	72%	7,071	77%
Taber, Town	574	6%	434	5%
Pincher Creek	464	5%	159	2%
Claresholm	239	3%	145	2%
Coaldale	207	2%	382	4%
Fort MacLeod	183	2%	138	2%
Cardston, Town	176	2%	103	1%
Blairmore	140	2%	71	1%
Mountain View	104	1%	12	0%
Picture Butte	97	1%	63	1%
Raymond	81	1%	145	2%
Nanton	71	1%	129	1%
Milk River	69	1%	24	0%
Crowsnest Pass	46	1%	20	0%
Vauxhall	33	0%	38	0%
Milo	29	0%	13	0%
Coleman	24	0%	75	1%
Siksika	23	0%	43	1%
Glenwood	19	0%	15	0%
Diamond City	7	0%	6	0%
Stirling	4	0%	60	1%
Mossleigh	3	0%	6	0%
Grand Total	**9,190**		**9,152**	

Source: Vicinity Jobs

4.2.3 Labour Demand and Supply by Industry Sector

In the SouthGrow Region, most of the labour demand took place in retail trade and health care and social assistance (19%, respectively). Meanwhile, most of the labour supply was in the accommodation and food services sector (29%).

On the other hand, the Southwest Alberta region saw most of the labour demand in health care and social assistance (almost 43% of job postings). Most job seekers in this area were in the accommodations and food services (33%).

Figure 53: Job postings and job seekers by industry sector (2-digit NAICS)

	SouthGrow Region		Southwest Alberta	
NAICS	Job Postings (1)	Job Seekers (2)	Job Postings (3)	Job Seekers (4)
11 - Agriculture, Forestry, Fishing and Hunting	0	5	43	
21 - Mining and Oil and Gas Extraction	2	19	1	4
22 - Utilities	3	4	4	1
23 - Construction	38	44	3	7
31-33 - Manufacturing	421	292	37	15
41 - Wholesale Trade	100	111	10	9
44-45 - Retail Trade	749	384	139	16
48-49 - Transportation and Warehousing	65	85	5	11
51 - Information and Cultural Industries	104	36	1	2
52 - Finance and Insurance	283	68	30	7
53 - Real Estate and Rental and Leasing	32	18	20	4
54 - Professional, Scientific and Technical Services	252	80	7	10
56 - Administrative and Support, Waste Management and Remediation Services	112	41	26	4
61 - Educational Services	445	298	1	21
62 - Health Care and Social Assistance	747	149	323	26
71 - Arts, Entertainment and Recreation	18	21	12	2
72 - Accommodation and Food Services	388	702	55	70
81 - Other Services (except Public Administration)	42	26	25	2
91 - Public Administration	47	18	3	1
Grand Total*	3,848	2,401	745	212

Source: Vicinity Jobs

Notes

(1) Number of Postings applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 4,175

(2) Number of Job Seekers applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 6,014

(3) Number of Postings applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 721

(4) Number of Job Seekers applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 655

In terms of specific industries, most of the job postings in the SouthGrow Region were in general medical and surgical hospitals, depository credit information, and department stores. Meanwhile, most of the job seekers were in the full-service restaurants and limited-service eating places, food services and drinking places, and traveller accommodation.

Figure 54: Top 10 job postings and job seekers by industry sector (4-digit NAICS) – SouthGrow Region

NAICS	Postings	NAICS	Seekers
6221 - General Medical and Surgical Hospitals	718	7225 - Full-service restaurants and limited-service eating places	297
5221 - Depository Credit Intermediation	204	722 - Food Services and Drinking Places	238
4521 - Department Stores	179	7211 - Traveller Accommodation	165
6112 - Community Colleges and C.E.G.E.P.s	163	6100 - Educational Services (unknown sub-category)	162
6113 - Universities	110	6221 - General Medical and Surgical Hospitals	111
5416 - Management, Scientific and Technical Consulting Services	108	4521 - Department Stores	101
4481 - Clothing Stores	100	6113 - Universities	84
3121 - Beverage Manufacturing	98	4800 - Transportation and Warehousing (unknown sub-category)	59
7225 - Full-service restaurants and limited-service eating places	95	4441 - Building Material and Supplies Dealers	54
5616 - Investigation and Security Services	82	4461 - Health and Personal Care Stores	53

Source: Vicinity Jobs

Southwest Alberta also experienced a high labour demand in sectors such as general medical and surgical hospitals; and department stores. The fishing sector also was at the top by labour demand.

The job seekers in the area looked mostly for jobs in the traveller accommodation and educational services sector.

Figure 55: Top 10 job postings and job seekers by industry sector (4-digit NAICS) – Southwest Alberta

NAICS	Postings	NAICS	Seekers
6221 - General Medical and Surgical Hospitals	308	7211 - Traveller Accommodation	25
4521 - Department Stores	109	6100 - Educational Services (unknown sub-category)	18
1141 - Fishing	43	6221 - General Medical and Surgical Hospitals	17
5221 - Depository Credit Intermediation	28	7225 - Full-service restaurants and limited-service eating places	17
5616 - Investigation and Security Services	24	4521 - Department Stores	7
7225 - Full-service restaurants and limited-service eating places	22	4800 - Transportation and Warehousing (unknown sub-category)	7
5312 - Offices of Real Estate Agents and Brokers	20	2382 - Building Equipment Contractors	5
3121 - Beverage Manufacturing	17	5413 - Architectural, Engineering and Related Services	5
6233 - Community Care Facilities for the Elderly	12	4143 - Home Furnishings Wholesaler-Distributors	4
4451 - Grocery Stores	11	5221 - Depository Credit Intermediation	4

Source: Vicinity Jobs

4.2.4 Labour Demand and Supply by Occupational Category

In all the geographies (SouthGrow Region and Southwest Alberta), the sales and service occupations recorded the highest labour demand and the most significant labour supply. 30% of SouthGrow's job postings and 32% of Southwest Alberta's job postings were in sales and services.

25% of SouthGrow's job seekers and 23% of Southwest Alberta's job seekers were in sales and services.

Figure 56: Job postings and job seekers by occupational category (1-digit NOC)

	SouthGrow		SouthWest	
NOC	Job Postings	Job Seekers	Job Postings	Job Seekers
0 - Management occupations	916	567	109	64
1 - Business, finance and administration occupations	791	560	136	54
2 - Natural and applied sciences and related occupations	121	116	22	19
3 - Health occupations	972	250	342	22
4 - Occupations in education, law and social, community and government services	486	370	59	34
5 - Occupations in art, culture, recreation and sport	93	169	18	15
6 - Sales and service occupations	2,371	2,065	473	199
7 - Trades, transport and equipment operators and related occupations	752	1278	122	157
8 - Natural resources, agriculture and related production occupations	117	111	32	17
9 - Occupations in manufacturing and utilities	137	172	16	11
Other / Unidentified	1,267	2,757	137	275
Grand Total	8,023	8,415	1,466	867

Source: Vicinity Jobs

In terms of specific occupations, most of the job postings in the SouthGrow Region were for retail salespersons, nurse aides, orderlies and patient service associates, and retail and wholesale trade managers.

On the other hand, most of the job seekers looked for positions such as cashiers, material handlers, and retail salespersons.

Figure 57: Top 10 job postings and job seekers by occupational category (4-digit NOC) – SouthGrow Region

NOC 4-Digit	Postings	NOC 4-Digit	Seekers
6421 - Retail salespersons	307	6611 - Cashiers	355
3413 - Nurse aides, orderlies and patient service associates	274	7452 - Material handlers	292
0621 - Retail and wholesale trade managers	217	6421 - Retail salespersons	261
6322 - Cooks	217	6322 - Cooks	200
3012 - Registered nurses and registered psychiatric nurses	182	6552 - Other customer and information services representatives	188
3233 - Licensed practical nurses	172	6623 - Other sales-related occupations	184
6311 – Food-service supervisors	169	0621 - Retail and wholesale trade managers	152
6411 - Sales and account representatives - wholesale trade (non-technical)	152	3413 - Nurse aides, orderlies and patient service associates	120
6235 - Financial sales representatives	128	7612 - Other trades helpers and labourers	120
6552 - Other customer and information services representatives	125	6711 - Food counter attendants, kitchen helpers and related support occupations	114

Source: Vicinity Jobs

The figure below shows that most of the labour demand in Southwest Alberta was in occupations such as nurses aides, orderlies and patient service associates; registered nurses and registered psychiatric nurses; ad licensed practical nurses. Meanwhile, the labour supply was most prominent in occupations such as material handlers, cashiers and cooks.

Figure 58: Top 10 job postings and job seekers by occupational category (4-digit NOC) – Southwest Alberta

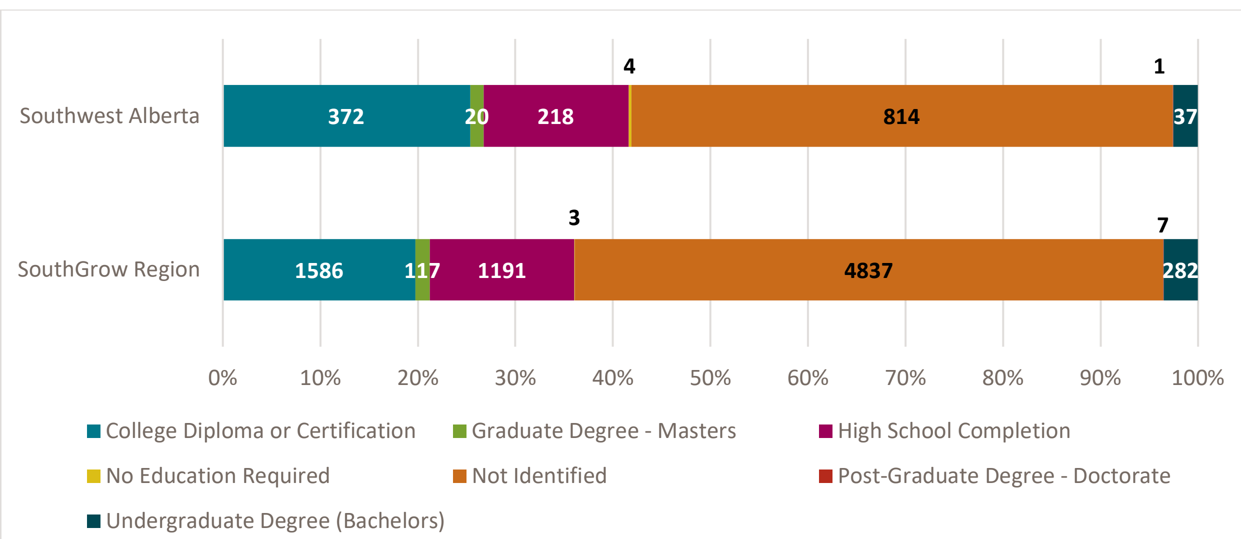
NOC 4-Digit	Postings	NOC 4-Digit	Seekers
3413 - Nurse aides, orderlies and patient service associates	98	**7452 - Material handlers**	30
3012 - Registered nurses and registered psychiatric nurses	93	**6611 - Cashiers**	29
3233 - Licensed practical nurses	59	**6322 - Cooks**	27
6322 - Cooks	50	**7511 - Transport truck drivers**	21
6421 - Retail salespersons	45	**6552 - Other customer and information services representatives**	17
6311 – Food-service supervisors	30	**6711 - Food counter attendants, kitchen helpers and related support occupations**	16
3414 - Other assisting occupations in support of health services	27	**6421 - Retail salespersons**	13
6222 - Retail and wholesale buyers	27	**6731 - Light duty cleaners**	12
6211 - Retail sales supervisors	25	**7237 - Welders and related machine operators**	12
6611 - Cashiers	20	**6623 - Other sales-related occupations**	11

Source: Vicinity Jobs

4.2.5 Labour Demand and Supply by Educational Requirements/Level

Most of the job postings in both areas required at least a college diploma or certification. The SouthGrow Region evidences a significant number of job postings requiring an undergraduate degree.

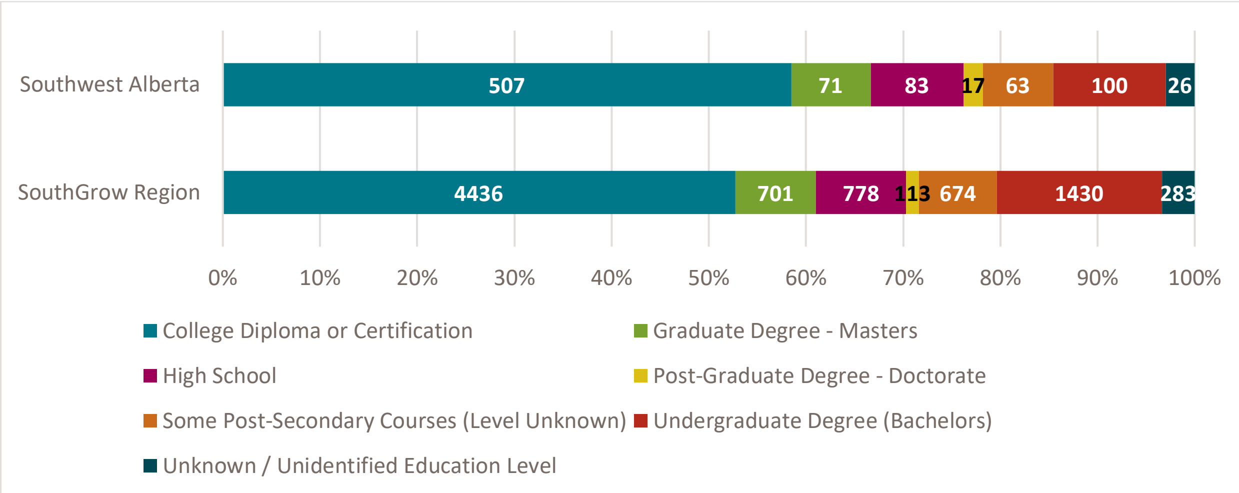
Figure 59: Job postings by educational requirements – SouthGrow Region and Southwest Alberta



Source: Vicinity Jobs

Turning to the educational level of job seekers, in both areas, most of the labour supply registered a college diploma or certification. The SouthGrow Region also recorded a significant number of job seekers with an undergraduate degree.

Figure 60: Job postings by educational requirements – SouthGrow Region and Southwest Alberta



Source: Vicinity Jobs

4.2.6 Labour Demand and Supply by Skills

The figure below shows the top skills for demand and supply in the SouthGrow Region. Skill groups are divided into general/soft skills, specialized skills, technologies, and tools and equipment

Figure 61: Top 5 skills by skill group – demand and supply, SouthGrow Region

Demand	Supply
General / Soft Skills	**General / Soft Skills**
Communication skills	Customer Service
Customer Service	Communication skills
Teamwork	Time Management
English language	Teamwork
Fast-paced Setting	Ability to Learn
Specialized Skills	**Specialized Skills**
Sales	Sales
Occupational Health and Safety	Office Administration
Budgeting	Accounting
Office Administration	Project Management
Analytical Skills	Inventory Management
Technologies	**Technologies**
Microsoft Office	Microsoft Office
Microsoft Excel	Microsoft Excel
Microsoft Word	Microsoft Word
Microsoft Outlook	Microsoft PowerPoint
Microsoft PowerPoint	Adobe Systems Adobe Photoshop
Tools and Equipment	**Tools and Equipment**
Forklifts	Forklifts
Power Tools	Power Tools
Conveyors	Boilers
Boilers	Skid steers
Disposal units	Lawnmowers

Source: Vicinity Jobs

The figure below shows the top skills for demand and supply in Southwest Alberta. Skill groups are divided into general/soft skills, specialized skills, technologies, and tools and equipment

Figure 62: Top 5 skills by skill group – demand and supply, Southwest Alberta

Demand	Supply
General / Soft Skills	**General / Soft Skills**
Customer Service	Customer Service
Communication skills	Communication skills
Teamwork	Time Management
Fast-paced Setting	Teamwork
English language	Ability to Learn
Specialized Skills	**Specialized Skills**
Sales	Office Administration
Budgeting	Sales
Office Administration	Accounting
Accounting	Occupational Health and Safety
Risk Management	Inventory Management
Technologies	**Technologies**
Microsoft Office	Microsoft Office
Microsoft Excel	Microsoft Excel
Microsoft Word	Microsoft Word
Microsoft Outlook	Microsoft PowerPoint
Customer relationship management CRM software	Intuit QuickBooks
Tools and Equipment	**Tools and Equipment**
Forklifts	Forklifts
Diesel engines	Power Tools
Navigation equipment	Backhoes
Alarm systems	Excavators
Boilers	Lowboys

Source: Vicinity Jobs

4.2.7 About Vicinity Jobs Data

"Real-time" labour market information (LMI) is generated by extracting information from publicly available online job postings. Since the Web has evolved as the primary media through which employers connect with job applicants, it houses information about a significant portion of the job openings that employers are looking to fill. By using continuously improved text-scraping and artificial intelligence technologies to extract intelligence from the content of those web postings, real-time LMI can gather, organize, categorize, and analyze the vast quantities of data in a very short period. Real-time LMI data include a vast volume of unstructured background information that employers provide to potential jobseekers through their current employment advertisements. These advertisements tell workers that employers plan to hire shortly to meet business needs, and they also describe the knowledge, skills, and abilities that a firm will require to succeed in the near-term future.

Organized and aggregated, this information provides a powerful tool that can help policymakers understand companies' short-term hiring plans and the factors influencing those plans. Current computing and data management technologies allow for quick data mining and processing, transforming raw job posting data into information that can be used for analysis. Data aggregated from job postings is cross-referenced against databases containing information about local employers and communities, to produce meaningful hiring demand reports by community, employer, and industry. In contrast to reports based on traditional reporting methodologies, which can take months or years to produce, real-time LMI reports are available within a few weeks. They enable analysts to monitor ongoing short-term job market trends as they unravel. In contrast, traditional public survey data usually only becomes available months or years after decisions have been made.

As with any other statistical analytic methodologies, it is very important to ensure the credibility of the analyzed data. For this reason, Vicinity Jobs / MDB have chosen only to process job postings advertised on websites that have deployed effective control processes to ensure the authenticity of job openings and the credibility of advertisers.

- Postings from free job boards that do not validate the authenticity of job openings (such as Kijiji and Craigslist) are not included in the Vicinity Jobs reporting service
- Postings from the Service Canada Job Bank are included because Service Canada verifies the employer's identity before accepting job postings (by requiring them to provide a valid CRA payroll ID).
- Significant sources of job postings are not added without prior notifications to users of the reporting system, accompanied by an analysis of the impact that the change is expected to have on overall numbers. Similar analysis and notifications are provided when a data source becomes unavailable.

However, real-time LMI is not produced by public data agencies, so it does not have the same quality standards as Federal statistical sources. Furthermore, because it is still experimental and likely biased in ways that are not clear, Federal data agencies have been slow to adopt the technology. The data focuses narrowly on the hiring outlook of those companies that advertise job opportunities on the web (rather than all employers). Private data providers, however, are experimenting extensively with real-time LMI. Despite these limitations, as businesses become increasingly comfortable with using the Internet as a worker recruitment tool and as analysts better understand the inherent biases of the data, real-time LMI can help to revolutionize the way data is collected and analyzed, including the speed at which insightful information is available to understand economic turning points and the characteristics of emerging trends.

5. Document Review – Common Threads Analysis

A detailed review of all relevant municipal reports and policy documents was conducted. Documents reviewed include:

- Lethbridge 2013 Economic Indicators of Industry
- Lethbridge Community Outlook 2015-2022
- Lethbridge Economic Trends & indicators Spring 2016
- Lethbridge Economic Trends & Indicators Fall 2016 Report
- Lethbridge Economic Trends & Indicators 2016 Year-End Report
- Lethbridge Labour Force Semi-Annual Update 2019
- Lethbridge 2019 Brighter Together Report
- Lethbridge Economic Trends & Indicators 10 years in Review
- Lethbridge Labour: Critical & Complex
- Calgary’s Talent Needs: Challenges and Opportunities
- Taber: Growing Our Economic Future Regional Economic Development Strategy
- Sprouted: The plant ingredient opportunity taking root on the Prairies

5.1 Summary of Findings

The reviewed policies and documents have been analyzed comparatively to uncover areas of thematic overlap. The policies have been catalogued according to common themes to observe patterns – in essence, to find the “common threads” among them. All documents were read, and all relevant documents with workforce-related information were analyzed. The following observations are important, as they highlight themes that are strongly represented in the current workforce trends.

The common threads identified among the policies and documents examined above include:

Population and Workforce Size

Population growth is correlated with an expanding workforce, which should lead to greater prosperity. Lethbridge 2013 Economic Indicators of Industry mentions that more than 50% of companies surveyed expect to increase their workforce in the next year. The Lethbridge 2019 Brighter Together Report followed up by stating more than 40% of businesses expect to increase their labour force in the next 6-12 months, with a similar proportion projecting increased operational spending over the same time. The Lethbridge Community profile projects that by 2022 the total number of people employed within Lethbridge is expected to increase by just under 4,400 to a total of 49,096 and that employment growth may ultimately be limited by the rate of anticipated growth in population. The Lethbridge Economic Trends & Reports in spring, fall, year-end of 2016 and 10 years in review document all mentioned Lethbridge witnessed the most stable population growth of any mid- to large-sized Alberta city with an annual population growth that averaged 2.1% over the past decade. They also mentioned the participation rate in the Lethbridge-Medicine Hat Economic Region was 69.5% in 2016, up 2.3

percentage points on a year-over-year basis. The Lethbridge Brighter Together Business Report 2019 comments on the rising participation rate as a good indicator of economic health and suggest there is enough labour supply to meet the needs of employers.

Education and Training

The Lethbridge Labour: Critical & Complex document stated that since 2003 the labour force has shifted from those with skills in construction and mining to people with more university education and now over-education and over-skilling in some areas coexist with under-education and under-skilling for young professionals in other areas. Furthermore, long-term employment is leading to a lack of relevant skills for older employees at an increasing rate, especially for those who are not pursuing ongoing professional development. It was also mentioned in the report's survey that employers feel less than half of graduates are adequately prepared to enter the job market, and one in three employers reported difficulty filling positions as a result of a lack of suitable candidates. The document recommended the city focus on expanding just in time training and programs for in-demand jobs and opportunities for secondary and post-secondary students to learn about career paths and opportunities. The report also put a spotlight on the industry, providing training and engaging more students to consider in-demand jobs through marketing materials and participation in career fairs and speaking/mentorship opportunities. The Calgary Talent Need's document focused on the benefits of attracting international students and The Lethbridge Community Outlook dived further into the profile of the school and mentioned the expansion to the University of Lethbridge with a new building expecting to open soon. There were 8,296 students at the University of Lethbridge in fall 2015 and 6,524 students at Lethbridge College during the 2014-2015 academic year.

Sector Specific Job Trends

The Lethbridge Community Outlook document 2015-2022 mentions the three largest employment categories were retail, healthcare and social services, and accommodation and food services, which collectively make up 42.7% of all employment in Lethbridge. With eight of Lethbridge's largest employers being in the public sector, Lethbridge has benefited from growth in public administration, health and education. The report also mentions that mining and oil and gas extraction has a relatively small business footprint in Lethbridge and makes up only 0.26% of all employment in the City. The report concludes that the small number of energy companies located in Lethbridge explains why the recent downturn in oil prices has not had a large impact on the local economy when compared to the rest of the province. The Labour Force Semi-Annual Update 2019 and 2019 Brighter Together Business Report complements the information in the community outlook document by mentioning the three largest employment categories, retail, healthcare and social services are continuing to witness substantial labour force growth and the biggest loss in jobs was in construction. The Lethbridge Labour: Critical & Complex document mentioned the transportation sector as an example of a skills mismatch. A survey found there is a surplus of transportation employees at the provincial level and a deficit in Lethbridge. Calgary's Talent Needs: Challenges and Opportunities document purposes policy solutions around education and immigration to fill vacancies in the tech industry.

Ageing workforce

The Lethbridge Community Outlook document 2015-2022 mentioned that for every senior who is actively participating in Lethbridge's workforce today, there would be 2.2 people aged 65-plus by 2041. this means that the increasing participation rates in Lethbridge will only partially offset the impact of the great number of retiring baby boomers, which is part of a nation-wide trend. The Lethbridge Labour: Critical & Complex document focuses on older people who are still working, which is ageing the workforce. This is a particularly salient point in Alberta, where the employment rate among people over

65 years of age increased by over seven percentage points between 2003 and 2013 and now exceeds the national rate by over six percentage points. One study referred to in this report correlated the ageing workforce is a short-term advantage for employers to eliminate the costs of finding and training new employees.

Shortage of Skills and Labour

According to the Lethbridge Labour: Critical & Complex document, the top 20 shortages of labour were dominated by low- to medium-skill level occupations and represent jobs that are often filled by younger workers, recent immigrants or temporary foreign workers. On the other hand, the report mentions immigration programs that lead to permanent residency are more tailored to the professional class, and youth unemployment rates have increased in about 80% of developed economies, which suggests young people are three times as likely as adult workers to be unemployed. When the report focuses on Lethbridge, it finds that food & beverage, agriculture and trades/industrial were the top three job vacancies. Calgary's Talent Needs: Challenges and Opportunities document focuses specifically on the shortage of tech workers in the largest City close to Southwestern Alberta communities. The document mentions Calgary is feeling the pressure of filling the demand for tech talent with approximately 2,000 open technology jobs, and this is expected only to be the beginning of the demand curve for this Talent. A study in the report found that 36 percent of tech companies state the lack of digitally skilled Talent is inhibiting their plans for growth.

The figure below presents a common threads matrix, showing the association between each theme relative to the documents it has been identified in via a series of checkmarks. A single checkmark (✓) indicates the document has some content relating to the theme, but it is not a primary focus of the document, while a double checkmark (✓✓) indicates there is a primary focus on the theme.

Table 47: Common Threads Analysis

Common Themes	Population and Workforce Supply/Demand	Education and Training	Sector Specific Job Trends	Ageing Workforce	Shortage of Skills and Labour
Lethbridge 2013 Economic Indicators of Industry	✓				
Lethbridge Community Outlook 2015-2022	✓✓	✓✓	✓✓	✓✓	
Lethbridge Economic Trends & indicators Spring 2016	✓✓				
Lethbridge Economic Trends & Indicators Fall 2016 Report	✓✓				
Lethbridge Economic Trends & Indicators 2016 Year-End Report	✓✓				
Lethbridge Labour Force Semi-Annual Update 2019	✓		✓✓		
Lethbridge 2019 Brighter Together Business Report	✓		✓✓		
Lethbridge Economic Trends & Indicators 10 years in Review	✓				
Lethbridge Labour: Critical & Complex	✓	✓✓	✓	✓✓	✓✓
Calgary's Talent Needs: Challenges and Opportunities		✓✓	✓✓	✓	✓✓
Taber: Growing Our Economic Future Regional Economic Development Strategy	✓✓	✓✓	✓✓	✓	✓✓
Sprouted: The plant ingredient opportunity taking root on the Prairies		✓	✓✓		✓

6. Literature Review: A Continually Updating Section

Note: Given the unprecedented nature of the current COVID 19 crisis, this section has been updated from the phase one report to reflect the current Canadian policy environment, key workforce drivers, and commentary on emerging workforce trends as they relate to Southwest Alberta. Note, due to publishing lags and the rapidly changing nature of the economy during COVID-19, these numbers may fail to encapsulate the true magnitude of the economic downturn.

Our literature review includes relevant industry publications, leading research related to issues surrounding workforce development, labour market planning, and talent attraction and retention in a globalized and innovative labour market. This review includes sources such as the Global Talent Competitiveness Index, reliable publications on the war for talent, Deloitte Global Human Capital Trends, and Manpower Workforce Insights publications. Local economic and workforce development strategies and relevant provincial and federal publications and reports and labour market studies (Conference Board of Canada, Sector Councils, Service Canada), and professional reports have been reviewed.

6.1 Introduction

According to the International Monetary Fund (IMF), the global economy is expected to contract by at least 3 percent this year, contrasted against the anticipated 3.3 percent growth in January 2020. Within Canada, the downturn appears to be twice as big. However, growth is expected to rebound in the latter part of 2020 and during 2021. The forced closures of businesses worldwide have resulted in huge spikes in unemployment, with policymakers trying to respond to insulate workers from the worst of the impact.

Deloitte[5], a consultancy, found the economy contracted an annualized 8.3 percent in Q1 of 2020, and decreased by 39.8 percent in Q2. Growth mostly resumed in May, with the economy predicted to grow by an average of 27 percentage in the second half of 2020. Overall, the economy is estimated to contract by 5.9 percent but will rebound by 5.6 percent in 2021. Statistics Canada's most recent labour force survey[6] found that from February to April, 5.5 million Canadian workers were affected by the COVID-19 economic shutdown. Employment dropped by 3.0 million and a COVID-related increase in absences from work of 2.5 million. The unemployment rate as of June 2020 was sitting at 12.3%, down by 1.4% from May. Over the long term, the Centre for Economics and Business Research (CEBRE)[4] predicts that Canada will climb to 8th position in terms of the top world economies by 2034, fuelled by immigrant-led population growth.

This macro analysis indicates that although growth is occurring, labour shortages and mismatches are happening across Canada[7]. National talent trends are making it more difficult for businesses to source the workers they need to compete. Particularly in the tech sector where

[5] Deloitte, *Unprecedented in every way Economic outlook*, June 2020

[6] Statistics Canada, *Labour Force Survey*, June 2020

[7] Manpower Talent Survey, manpowergroup.com/media-center/news-releases/talent+shortages+at+record+high+45+of+employers+around+the+world+report+difficulty+filling+roles

companies are desperately seeking talent[8]. The following major demographic shifts exacerbate these trends:

- Ageing populations;
- Depopulation of rural areas;
- Increased urbanization;
- Increased talent mobility (over 250 million international migrants in 2015);
- Declining birth rates.

Globally, these conditions have created new challenges in both the attraction and retention of talent, with 42% of employers reporting difficulty filling jobs due to talent attraction issues[9]. Canada, in particular, faces the real risk of brain drain as only two of the top ten companies identified by Engineering/IT as their most preferred place to work were Canadian Companies[10].

These challenges have led to cities and regions, rather than countries, developing more substantial roles as talent hubs. The growing importance of these sub-regions is due to their greater flexibility and ability to adapt to new trends and patterns where policy can be changed swiftly. Entrepreneurial talent can interact more readily with municipal systems than national policymakers[11].

This focus on more specific regions and firms have increased with the modern workforce's mobility and desire to qualify better where and how they work.

[8] Canadian Tech Companies Desparately Seeking Talent, theglobeandmail.com/business/careers/management/article-canadian-tech-companies-desperately-seeking-talent/

[9] Gartner Emerging Risks Survey, www.gartner.com/en/newsroom/press-releases/2019-01-17-gartner-survey-shows-global-talent-shortage-is-now-the-top-emerging-risk-facing-organizations Global Talent Shortage Survey

[10] Universum Canada Rankings 2019, universumglobal.com/rankings/canada/

[11] The Global Talent Competitiveness Index, 2019 Entrepreneurial Talent and Global Competitiveness, gtcistudy.com/wp-content/uploads/2019/01/GTCI-2019-Report.pdf

6.2 Global Workforce Drivers

The following section of this report describes critical global, national, and provincial workforce trends identified within the literature.

6.2.1 International and National Key Trends

COVID 19 – Comprehending and Overcoming the Most Significant Economic Challenge of Modern Times

The global economy and the future of workforce development is currently being challenged like never before. Coronavirus or COVID-19 is not only a health crisis of great severity, but it is also the most significant economic threat since the global financial crisis of 2007-08. While the economic fallout from the COVID-19 pandemic is still far from clear, economists worldwide are predicting that millions of jobs could be permanently removed within the coming months.

Research from the World Bank[12] predicts that the required lockdowns in Europe and across the US to control the virus will result in a 5.2 percent contraction in global GDP in 2020. The report argues that the crisis highlights the need for urgent action to cushion the pandemic's health and economic consequences, protect vulnerable populations, and set the stage for a lasting recovery. The pandemic is predicted to push most countries into recession in 2020, with per capita income contracting in the most considerable fraction of countries globally since 1870. Canada and other advanced economies are projected to shrink 7 percent.

Recent evidence now suggests that the trough in economic activity resulting from COVID-19 may have occurred in April. Governments and consumers are now starting to plan how the economy should reopen in a world still hampered by the virus. Policymakers' focus has now shifted from reacting to the virus into recovery mode. With the Canadian summer soon ending and the new school year about to begin, the question is being asked, "what are, and are we comfortable with the trade-offs from reopening the economy?". Perhaps the biggest takeaway is that whatever the future direction is, governments, businesses, and consumers will increasingly have to turn towards technology to provide innovative solutions to overcome these challenges.

The Threat and Unpredictability of Automation on Workforce Development

Another critical challenge identified within the literature review is the growing threat of automation on jobs and the required workforce skills. However, the inherent unpredictability of technology change means quantifying the impact automation will have on job losses is extremely difficult. Consolidation of research by The Future Skills Centre[13] found that jobs at risk of automation range anywhere from 6%-59% depending on the country, industry, and methodology used. For example, one study by McKinsey[14] found that globally, 49% of

[12] World Bank, The Global Economic Outlook During the COVID-19 Pandemic: A Changed World, 2020

[13] Future Skills Centre 2020, *Understanding The Future of Skills: Trends and Global Policy Responses*, https://fsc-ccf.ca/research/understanding-the-future-of-skills-trends-and-global-policy-responses/

[14] McKinsey & Company 2017. *A future that works: Automation, employment, and productivity*. https://www.mckinsey.com/featured-insights/digital-disruption/harnessing-automation-for-a-future-that-works

activities that workers are paid to do could be automated using existing technology. However, less than 5% of occupations are susceptible to total automation, and for about 60% of occupations, at least 30% of the activities involved are technically automatable today. From a national perspective, the critical finding is that 42% of Canadian jobs are at a high risk of automation and 36% at low risk. However, only 1% of Canadian jobs were found to be 100% automatable[15]. Overall, while the degree of jobs at risk by automation is unclear, what is clear is that automation is and will continue to change the workforce landscape drastically.

Routine and Manual Tasks are at the Highest Risk of Automation

Another theme identified within the literature is that tasks and jobs that are routine, whether that be manual or cognitive[13], are most at risk of automation. Any codifiable tasks[16]which a computer could complete will likely be automated over the coming years with immigrants and low-skilled workers, particularly at risk.

The Shift Towards Temporary and Contract Positions.

As research indicates that the complete automation of jobs is unlikely in the short term, occupations and jobs will increasingly be separated into discretely defined tasks. When combined with digital platforms that enable the instant skill and job matchmaking, a more fluid piecework-based labour market will likely occur within an increase in contract workers[13]. For example, a World Economic Forum survey[17] found that 50% of major companies surveyed are expected to cut their permanent workforce, while 48% are expected to hire specialist contractors instead of employees. Only 38% are expected to grow their permanent workforce. Overall, this could place additional pressure on government social supports, such as pensions and private health benefits, as more workers struggle to make ends meet between contracts.

On the flip side, the rise of automation will increase the number of remote workers. This shift presents an opportunity for municipalities to offer economic incentives to try to attract people to live and spend within their region[18]. Flow on effects could include drastic talent increases and decreases across regions, depending on the number of lifestyle-related amenities and services that municipalities could offer to draw in remote workers.

Businesses are Less Willing to Train, and New Graduates Have Less Experience

Businesses had become increasingly more critical of new graduates and less willing to train them; in 1979, the average worker would receive 2.5 weeks of training per year, compared to 11 hours in 1995[19] and 2011 when only a fifth of workers reported receiving on the job training in the past five years. This situation has been compared to the tragedy of the commons, wherein society is better off with

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[15] Brookfield Institute for Innovation + Entrepreneurship (2016), *The talented Mr. Robot: The impact of automation on Canada's workforce*. https://brookfieldinstitute.ca/report/the-talented-mr-robot/

[16] The World Bank 2019. *World Development Report 2019: The changing Nature of work*. https://www.worldbank.org/en/publication/wdr2019

[17] World Economic Forum 2018, *The Future of Jobs Report*, http://www3.weforum.org/docs/WEF_Future_of_Jobs_2018.pdf.

[18] Policy Horizons Canada 2019. *The future of work: Five game changers*. https://horizons.gc.ca/en/2019/06/20/the-future-of-work-five-game-changers/

[19] Young Workers No Longer Get the On-the-Job Training They Need, entrepreneur.com/article/314468

trained workers. Still, companies want to shift the cost of training to individuals and their competitors. These factors combine with the graduation of a generation of students with the lowest percentage of work experience recorded. "In 1948 and 1978, 57% and 58% of 16-19 year-olds had a paid summer job. By 2017, only 35% reported having a summer job. The percentage of 15-17 year-olds who reported working in any fashion in the prior year has dropped from 48% in 1968 to a mere 19% in 2018. And the percentage of 18-21 year-olds reporting working in the prior year has dropped from 80% in 1968 to 58% in 2018."[20]

These trends create a perfect storm of graduates without experience and workplaces less willing or able to provide training, causing significant frustration on both sides.

Growing Evidence of Skills Mismatch both Domestically and Abroad

A growing body of evidence suggests a mismatch between the skills employers are looking for and the skills workers possess. Within the European Union, more than 20% of workers receive either more or less formal education than is required for their job[21].

Domestically, Canada's workforce is increasingly being driven by a demand for skills; rather then the qualifications the graduates possess, and workers are struggling to keep up with the changing demand. For example, recent research[22] has found that one-third of Canadians hold a qualification higher than what is required of their job, and 35% of employers report difficulty finding skilled workers.

Another study by McKinsey reports 40% of American employers can not find talent with the skills they need, even for entry-level jobs, and almost 60% complain of lack of preparation, even for entry-level jobs[23]. Deloitte and The Manufacturing Institute research reveals an unprecedented majority (89 percent) of executives agree there is a talent shortage in the US manufacturing sector, 5 percent higher than 2015 results[24].

However, a vital issue domestically is Canada does not have a cohesive data on the skills required. The recently introduced Skills and Competency Taxonomy by Employment and Social Development Canada (ESDC) is Canada's best-known framework for defining skill needs. Research indicates that more significant expansion and utilization of this tool will benefit policymakers in understanding skill gaps in local communities.

[20] Why Aren't Graduates Ready For Work? They're The Least Working Generation In U.S. History, forbes.com/sites/brandonbusteed/2019/03/29/why-arent-graduates-ready-for-work-theyre-the-least-working-generation-in-us-history/#6e779e745e58

[21] OECD 2016, *Getting skills right: Assessing and anticipating changing skill needs*

[22] Skills Next 2020, *Solving the Skills Puzzle: The Missing Piece is Good Information*, https://ppforum.ca/publications/solving-the-skills-puzzle/

[23] Closing the skills gap, mckinsey.com/industries/social-sector/our-insights/closing-the-skills-gap-creating-workforce-development-programs-that-work-for-everyone?utm_source=Area+Development+Site+%26+Facility+Planning+Newsletters&utm_campaign=41aad6bef3-SFP_This_Week_377&utm_medium=email&utm_term=0_94850a8d43-41aad6bef3-302574205&goal=0_94850a8d43-41aad6bef3-302574205

[24] Deloitte and The Manufacturing Institute skills gap and future of work study, deloitte.com/us/en/insights/industry/manufacturing/manufacturing-skills-gap-study.html

A Surge in Demand for Digital Skills

Research from the McKinsey Global Institute found that automation will accelerate demand for technological skills[25]. The report predicts that by 2030 demand for technology skills will increase by 55% representing 17% of total hours worked, up from 11% in 2016. This unprecedented surge will affect both necessary digital skills, such as word processing and data entry, to more advanced skill sets such as programming. Canada's tech industry has emerged as being a key global destination for top tech talent and firms. Research by CBRE[26] found that the number of new tech jobs nationally increased by 161,700, or 24.1% over the past five years to 2019. The report indicated the key drivers behind this growth were the size of the talent pool, the high quality of labour, and the cost competitiveness of doing business in the Canadian market than the US. Regions such as Southwest Alberta, therefore, must continue to support local companies and workers who provide digital upskilling programs to ensure they remain competitive. According to a survey by Robert Half International Inc.,[27] more than 80% of roughly 2,800 tech-hiring decision-makers at US firms identified a lack of tech talent as a critical challenge, singling out data scientists as especially hard to find. According to Bain & Company, much of this demand will be sourced internationally. They estimate that the number of qualified candidates coming from India will climb to more than 200,000 by 2020, up from 65,000 in 2018, outpacing the talent supply in China, Western Europe, and North America[28]. Overall, this will create an opportunity for Canada as the United States becomes more hostile to immigration[29]. Businesses are already choosing their locations based on the availability of tech talent, with the most massive gains in tech real estate tied directly to graduation rates in specific programming[30].

Soft Skills are Increasingly Desired but Difficult to Obtain

According to a 2019 report published by LinkedIn[31], which surveyed 5,000 talented professionals across 35 countries, strong, soft skills – ones that are not easily replaceable by machines or Artificial Intelligence – are becoming increasingly valuable and sought after. The report found that 92% of talented professionals believe soft skills matter as much or more than hard skills when they hire, and 80% say they are essential to the company's success. The most important soft skills identified included creativity, persuasion, collaboration, adaptability, and time management[25]. However, despite the importance of soft skills, there is difficulty assessing them, with only 41% of respondents from the LinkedIn study having a formal measuring process in place. Traditional assessment methods such as interview questions and observing body language are not holding up, leading many companies to turn to online tools to better pre-screen

[25] McKinsey and Company, 2019, *Skill Shift, Automation and the Future of the Workforce* https://www.mckinsey.com/~/media/McKinsey/Featured%20Insights/Future%20of%20Organizations/Skill%20shift%20Automation%20and%20the%20future%20of%20the%20workforce/MGI-Skill-Shift-Automation-and-future-of-the-workforce-May-2018.ashx

[26] CBRE 2019, *Scoring Canadian Tech Talent*, https://www.cbre.ca/en/research-and-reports/Canada-Scoring-Tech-Talent-2019

[27] Robert Half, roberthalf.com/salary-guide/technology

[28] Supply of Analytics Workers Set to Double, wsj.com/articles/supply-of-analytics-workers-set-to-double-11556663406?mod=article_inline

[29] Indian immigrants have it bad in Donald Trump's America, qz.com/india/1667098/indians-in-trumps-america-have-it-better-than-early-immigrants/

[30] STEM Grads: At the Core of the Tech Location Decision, areadevelopment.com/skilled-workforce-STEM/Q1-2018/computer-science-talent-drives-tech-location-decision.shtml

[31] LinkedIn 2019, *Global Talent Trends 2019*, https://business.linkedin.com/talent-solutions/recruiting-tips/global-talent-trends-2019?trk=bl-po

candidates and remove the opportunity for biases to enter the equation[32]. Municipalities are also being encouraged to provide more significant training opportunities to support critical sectors. An interesting related trend is the development of so-called Hybrid Jobs[33] or Skills[34] that combine skill sets that never used to be found in the same job, such as marketing and statistical analysis, or design and programming. These often marry soft and hard skills in new and adaptive ways as workers adapt to changing conditions.

Adaptive Work Schedules – Now, an Integral Part of Any Job.

As technology has evolved and industries change, more employees and businesses have switched to the online realm. There has also been an increasing trend of employees wanting more flexibility in the location and timing. According to a 2019 report by Mercer[35], a consultancy, adaptive work schedules is growing in importance with 54% of employees indicating that managing work/life balance is one of the top 5 things their employer can do to help them thrive at work (compared to 40% in 2018 and 26% in 2017). Similarly, LinkedIn[31] found that there's been a 78% increase in job posts on LinkedIn that mention work flexibility over the past two years and a 24% increase over the past four years in the number of people who consider flexible work arrangements as being a critical factor when choosing a new job. In the post-COVID-19 era, adaptive work schedules are increasingly being viewed favourably. A survey of 120 US Company executives and 1,200 US office workers from May 29 and June 4, 2020, found that that 72% of office workers would like to work at least two days a week remotely[36].

Generational Divide

Another critical global workforce driver is the presence of five generations within the workforce. This generational divide has seen a shift in leadership style from formal authority to leadership by influence. The prevalence of technology has resulted in a flatter world that allows for more immediate responses with millennials attracted to leaders who are relatable and accessible and thrive in teams working towards a common goal[37]. With research from Mercer[35] indicating that two in five employees are planning to leave their organization in the next 12 months, it is increasingly important for firms to craft a compelling value proposition to attract and retain valuable staff. Employers are increasingly focusing on providing inhouse training and development resources to help ensure staff have the skill set they need.

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[32] What Is the Future of Work, areadevelopment.com/skilled-workforce-STEM/workforce-q4-2018/what_is-the-future-of-work.shtml?utm_source=Area+Development+Site+%26+Facility+Planning+Newsletters&utm_campaign=a7ffd763c8-SFP_Insider_1_18_2019&utm_medium=email&utm_term=0_94850a8d43-a7ffd763c8-302717633

[33] Hybrid Jobs, burning-glass.com/research-project/hybrid-jobs/?mod=article_inline

[34] The 'Hybrid' Skills That Tomorrow's Jobs Will Require, wsj.com/articles/the-hybrid-skills-that-tomorrows-jobs-will-require-11547994266

[35] Mercer 2019, Global Talent Trends 2019, https://www.mercer.com/content/dam/mercer/attachments/private/gl-2019-global-talent-trends-study.pdf

[36] Pricewaterhouse Coopers, *PwC's US Remote Work Survey*, June 25, 2020

[37] Adobe 2019, What Will The Future of Work Look Like? https://cmo.adobe.com/articles/2018/6/cwtk-what-will-the-work-place-of-the-future-look-like.html#gs.1fd8e4

6.2.2 National Outlook

Overview

As has been highlighted above, the rapid increase in technology and the effects of the current COIVD-19 pandemic are drastically reshaping Canada's economy and future of workforce development. As of July 26, 2020, over 8.46 million Canadians had applied for the CERB benefit scheme, with over $62.75B in benefits being paid out[38]. The Conference Board of Canada's forecast also reported the country's real GDP could fall 1.1 percent in 2020 and could shed 330,000 jobs over the second and third quarters with the unemployment rate to climb to 7.7%[39]. Key sectors, including tourism, retail, and household services, will be the hardest hit as consumer spending grinds to a halt. As is highlighted in the provincial outlook, a sharp decline in global oil prices to record lows is also compounding the problem.

COVID-19 Economic Response Plan

To combat this, on March 18, 2020, the Prime Minister announced a new set of economic measures to help stabilize the economy with $27 billion being allocated to support Canadian workers and businesses and $55 billion in tax deferrals. Amongst these initiatives, the most critical policies include the Canada Emergency Response Benefit (CERB) for individuals – providing $2,000 a month for up to 4 months for individuals who lose their income due to the virus – and the Wage Subsidy Program for Businesses, providing up to 75% of salaries up to a specified threshold. These measures have received a mostly positive response from the business community and residents. However, criticism has been raised, stating that the CERB benefit is too generous and disincentivizes lower-income workers from re-entering the job market. This disincentive leads to a peculiar situation where some employers are unable to find workers, despite unemployment being at record levels.

Municipalities Across Canada Respond

Alongside responses at the federal and provincial levels, municipalities across Canada have also been implementing their COVID-19 response plans to mitigate the impact on vulnerable worker populations and sectors. Notable local strategies include:

- **Edmonton Economic Recovery Grant**[40] – provides local businesses and business organizations with flexible funding to relaunch and strengthen their business models.
- **Red Deer Business Improvement Area (BIA) Tax Deferral**[41] – The City has extended property tax and BIA tax deferral until September 30, 2020.

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[38] Government of Canada, Canada Emergency Response Benefit statistics, 2020

[39] Conference Board of Canada, March 23 2020, https://www.conferenceboard.ca/insights/covid-19#economic-impact

[40] Edmonton, COVID-19 Response, 2020

[41] Red Deer, COVID-19 Response, 2020

- **Lethbridge Region Economy Recovery Task Force[42]: Lethbridge POST Promise[43] –** Implemented a marketing campaign whereby businesses can declare a POST Promise, a self-declaration that a business is working to help prevent the spread of COVID-19. They will then receive a logo, which is a nationally recognized symbol of businesses committed to protecting the local community.
- **Airdire Right for Business Support Program[44]** – The pilot will run May 21 to August 21, 2020, and is intended to provide Airdrie businesses with access to critical advisors and business service professionals to help them remain resilient through the COVID-19 pandemic.

Ahead by A Decade: Canadian Employment in 2030

The Brookfield Institute for Innovation and Entrepreneurship recently published a report outlining the future of employment in Canada up to 2030[45]. The 145-page document provides a detailed snapshot of crucial employment trends predicted to affect hiring decisions and which industries will decline or increase. One of the overarching insights from the report is that as Canada begins to recover from the COVID-19 pandemic thinking about the long term is now more critical than ever. The need to design policies and program supports that benefits Canadians in recovering from the crisis and ensuring they are at the forefront for the future of work is essential. Note, although a significant portion of the research for the report was conducted pre COVID-19, the insights are still insightful. The following lists relevant takeaways from the report.

- **Industries predicted to grow and decline** – A third of workers are currently employed in occupations with a high probability of change. Occupations in health, natural, and applied sciences are projected to grow, along with those with a high degree of service orientation and technical expertise. Occupations in manufacturing and utilities, however, are generally projected to decline by 2030. Strong support at all levels of government in helping workers upskill and transition industries is critical.
- **Essential skills and abilities –** The report identified five social skills and cognitive abilities that are foundational for the workforce of the future: fluency of ideas, memorization, instructing, persuasion, and service orientation. Greater focus on teaching these core skills in an educational curriculum must occur so that new graduates are prepared to enter the workforce. Workers will also need to become even more resilient to change and influence others in their behaviours, and learning as technology becomes more prevalent.
- **Job opportunities will not be equitable –** The report highlights the numerous inequities predicted to occur in the employment landscape by 2030. A wage gap will continue to exist with women earning significantly less than men ($33,552 versus $42,883), although they are less likely to work in industries expected to decline. Furthermore, nearly 50% of employees with a bachelor's degree or higher will work in an industry expected to grow, compared to 13% for those occupations predicted to decline.

[42] Lethbridge Region Economy Recovery Task Force, business.chooselethbridge.ca

[43] Lethbridge, COVID-19 Response, 2020

[44] Airdire, COVID-19 Response, 2020

[45] Brookfield Institute for Innovation and Entrepreneurship, *Ahead by a Decade: Employment in 2030*, 2020

- **Immigrants to fuel economic growth –** The report discusses how first-generation immigrants are more likely to work in occupations likely to grow. This will be a crucial driver of workforce growth for Canada.
- **Recommended policy changes –** To ensure equitable access to meaningful job opportunities, the report recommends reducing barriers to education, such as reducing student debt or a push to create and recognize other qualifications and micro-credentials instead of only university degrees. Additionally, more flexible training options for older workers to ensure they stay engaged within the workforce is needed and that this training adapts to their level of technology literacy.

6.2.3 Provincial Outlook

Overview

According to the latest data published by the Government of Alberta[46], in June 2020, Alberta's seasonally adjusted unemployment rate was 15.5%, up 8.9% from the same time the previous year. This rate was the second-highest in Canada, behind Newfoundland at 16.5% and was above the national rate of 12.3%. Overall employment in goods-producing sectors (e.g., agriculture, forestry, fishing, mining, oil, and gas, etc.) grew by 9,300 jobs from May to June but is still 80,100 jobs lower than June 2019. Services-producing sectors (e.g., trade, transportation and warehousing, professional, scientific and technical services, etc.) also grew by 82,200 from May to June but is still 189,100 jobs lower than June 2019[47].

A report published by RBC predicts that Alberta, as well as Saskatchewan, are expected to enter recession due to the collapse of the crude oil price and a slowdown in other industries such as wholesale and retail trade affected by COVID-19. The report forecasts Alberta's GDP will decline by 2.5% in 2020, down from a slight gain of 0.3% last year. [48]

Uncertain future for Alberta's oil and gas sector

Alberta's economy has struggled to recover from the 2015-16 oil shock. The latest mix of virus-related financial uncertainty and dramatic oil demand reduction (e.g., reduced travel) has sent oil prices down to a low of US$30 per barrel. Although economic predictions from TD Bank anticipate a slight recovery in oil prices once the worst of the pandemic has hit, they have downgraded oil projections to between US$40 and US$50 a barrel over the next two years[49].

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[47] Open Alberta, June 2020, https://open.alberta.ca/dataset/6b9b6e8b-247f-4513-905c-b4f49b1261c4/resource/434f7e94-4f10-4c6d-966b-e6964c7a6a10/download/li-lfs-package-2020-06.pdf

[48] Royal Bank of Canada March 2020, https://royal-bank-of-canada-2124.docs.contently.com/v/provincial-outlook-march-2020?utm_medium=internal&utm_source=website&utm_campaign=prov+march

[49] TD Bank 2020, Provincial Economic Forecast, https://economics.td.com/provincial-economic-forecast

What is most worrying is the current Alberta budget relies on a US$58 assumption for world oil prices for this fiscal year, roughly $20 above current levels. This discrepancy, combined with exchange rate fluctuations, means the budget could deteriorate up to $5 -$5.5 billion across the next year. According to TD, this would cause a revised budget deficit target of $12 billion.

On a positive note, the economic impact from this drastic drop in oil prices is unlikely to have severe an impact on Alberta's economy as was felt during the 2015-16 price crash. Since 2014, the industry has undergone severe consolidation and restructuring as it shifts from its growth phase to its mature phase. There has been a slowdown in production growth, the number of new projects, and capital expenditure in addition to massive employment reductions.

According to a report from the Parkland Institute[50], a non-partisan public policy research institute, 2014 saw peak employment for the Canadian oil and gas industry. Since then, employment across the sector has decreased for three years before increasing slightly in 2018 and declining further in 2019. Overall, the industry has terminated an estimated 53,119 jobs from 2014-2019 and saw oil capital expenditure decreased by an estimated 64.6% during the same period. The unemployment rate among young men aged 15 to 24 years in Alberta as of June 6 is now at a whopping 30.9 percent, up almost 24 percentage points from the same time last year.[51]

The report also found that the industry slowdown has resulted in firms attempting to do more with less, with productivity per employee in Canada's oil sands industry growing by 72% from 2011 through 2019 and productivity in oil and gas overall 47%. This productivity increase and subsequent labour reduction have been primarily driven by technological innovations such as driverless haul trucks in the oil sands, more robust data analytics technology, and horizontal multi-well drilling pads. For Southwest Alberta, there exist some opportunities to develop specialized talent to service the ongoing maintenance of the oil patch over the coming years. However, these jobs will be minimal, and the industry is unexpected to recover to pre-2014 employment levels. It is, therefore, clear that other alternative industries must be explored to create jobs for residents.

Managing the Talent Shift from Oil and Gas to Renewables

The future of Alberta's oil and gas sector is being challenged like never before. The question now is not, 'When will the sector recover?' but rather, 'What will a transition away from oil and gas mean for workers in Alberta?'. There is mounting pressure for the Provincial and Federal governments to establish a clear talent transition strategy, but the reality of this transition is complicated.

A key barrier preventing workers from transitioning is that the renewable energy sector is not growing at the same pace that the oil and gas sector is shedding jobs. For example, a 2018 report estimated there would be 8,800 annual full-time equivalent jobs by 2030 in the solar industry[52], which, while significant, does not compare to employment loss across the oil and gas sector. The renewable sector is also only expected to see a sizeable initial spike in employment during the initial construction period, with only a handful of engineers required

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50 Parkland Institute, The Future of Alberta's Oil Sands Industry 2019. https://www.parklandinstitute.ca/media_oil_sands_spending_and_productivity_figures_indicate_majority_of_lost_jobs_not_likely_to_return

51 Government of Alberta, *Economic Dashboard Unemployment Rate*, 2020

52 Solar Alberta, *Alberta's Solar PV Value Chain Opportunities Report*, 2018

for maintenance purposes in the long term. Large salary discrepancies are another key disincentive for those seeking work outside the oil and gas industry. For instance, an oil & gas project manager in North America earns an average of US$120,004, compared to the US$81,316 taken home by a wind farm project manager[53]. Overall, while it is clear that the clean energy sector cannot fully accommodate the job losses from oil and gas, it is apparent that the sector offers substantial employment opportunities. Local institutions (e.g., Southern Alberta Institute of Technology, University of Calgary, and Lethbridge College), which offer alternative energy program courses, should be supported and additional talent training courses created to help workers make this critical career transition. These courses could potentially be streamlined (e.g., no longer than 12 months), include practical placements, and have strong connections to employers, so job opportunities are easy to obtain. More significant promotion and perhaps even subsidies of these courses could also help workers make the transition.

Capitalizing upon Growth in the Plant-Based Protein Market

Will a meatless industry be a new source of job growth for Southwest Alberta? The COVID-19 pandemic disrupts the traditional meat processing industry, highlighting major health concerns and causing a future where protein is not sourced from conventional meat sources to be seriously considered. In Canada, more than 40% of the population is actively trying to incorporate more plant-based food into their diets. This growth has substantial economic repercussions with annual global sales of plant-based meat alternatives growing by an average of 8% a year since 2010, with projections forecasting that, in 25 years, 20% of meat will consist of plant-based and clean meat. Domestically, Canadian sales of plant-based protein products have grown by 7% to more than $1.5 billion in the 2016/17 fiscal year. Overall, plant-based protein is expected to contribute more than $4.5 billion in GDP growth for Canada[54].

The Canadian Prairies, including the Southwest Alberta region, is ideally positioned to become the world's 'protein basket,' with a competitive advantage in pulse fractionation, a new way of proceeding and extracting proteins to use as food ingredients and large areas of arable land. The Federal Government recently identified Protein Industries Canada (PIC)[55] as one of Canada's five innovation superclusters with the vision of positioning Canada as being 'a world leader in plant protein.' PIC is currently working with private sector industry partners to create co-investment projects that can transform the agriculture and food production sector and is expected to help generate an estimated $853 million in new commercial activity and upwards of 50,000 jobs. Key challenges preventing growth in the sector include outdated regulation, labour training, and infrastructure. Additionally, regulatory methods for measuring protein quality differ across regions, making it difficult for manufacturers to sell protein abroad.

The Plant Protein Alliance of Alberta (PPAA) is actively trying to overcome these challenges and make plant protein a critical economic driver of Alberta's economy. Canada currently exports nearly 95 percent of the agricultural products. It grows as raw commodities. Allison Ammeter, chair of PPAA and Pulse Canada, argues that "when we're shipping away raw products, we're shipping away jobs, we're shipping away GDP, and we're shipping away intellectual capacity — and then we're buying it all back again at full cost. We can be so

[53] Global Energy Talent Index, *The Global Energy Talent Index Report*, 2020.

[54] Government of Canada, *Plant-based protein market: global and Canadian market analysis*, 2019

[55] Protein Industries Canada, 2020.

much more."[56] She highlights the substantial job creation opportunities by bringing food production back and retaining the business and job growth in the local economy, which over the coming years, Southwest Alberta should be able to capitalize.

Importance of Agriculture

Agriculture is also a key component of Alberta's economy, earning 26% of Canada's farm cash receipts in 2015[57]. The wide diversity of landscapes and favourable climatic conditions means that the province supports various crops and livestock, with the Province recording over 43,000 farms in 2016 or 21% of Canada's total [58]. In 2016[59] the industry employed 33,498 full, part-time or seasonal employees and 57,605 farm operators. The Province's agricultural land base is also significant, with over 50.3 million acres that accounted for 31.7% of the national total in 2016.

Due to the high production volume, exports form a core part of Alberta's agriculture sector. In 2018, Alberta was the third-largest exporter of primary and processed agricultural and food products in Canada, exporting C$11.6 billion to international markets[60]. Alberta's strong international reputation drives these exports as a clean and safe food producer that consistently produces high-quality products. Recent changes to Canada's exchange rate and lowering of domestic demand will likely reduce growth within this sector moving forward. The Southwest Alberta region must continue to leverage Alberta's vital agriculture sector to secure steady employment for workers as the economy transitions moving forward.

[56] Alberta Seed Guide, *Plant Protein Alliance of Alberta Striving for a Paradigm Shift in Alberta Agriculture*, 2019

[57] Statistics Canada. Table 32-10-0436-01 Farms classified by total gross farm receipts in the year prior to the census

[58] Statistics Canada. Table 32-10-0403-01 Farms classified by farm type

[59] 2016 Census of Agriculture Summary, https://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/sdd16594/$file/Ag_Census_2016.pdf?OpenElement

[60] The Government of Alberta, Export Catalogue 2019, Accessed from: https://open.alberta.ca/dataset/d9d76bbb-b9de-429b-b8a8-d0ec5496ad08/resource/bbb07760-9914-4bc5-b2a1-3155cc3c1170/download/export-catalogue-web-july2019.pdf

6.2.4 Southwest Alberta

Nationally a focus on developing technology firms and talent has been a high priority over the past five years. The Information and Communications Technology Council's (ICTC) report *Digital Talent: Road to 2020 and Beyond,*[61] released in 2016, shares the tech talent and diversification themes of Alberta's recovery since the sustained downturn in oil prices has impacted the economy. As noted by Calgary Economic Development in their *Calgary in the New Economy*[62] , talent and innovation are seen as critical to the success of the region with four key initiatives:

- Create Canada's largest Talent accelerator,
- Establish Calgary as a magnet for students,
- Emphasize creativity and innovation from kindergarten to university, and
- Address immediate needs through attraction efforts.

The focus on talent in tech is a best practice and has been paying dividends for Calgary as the city has maintained its 6th place rank on CBRE's Scoring Canadian Tech Talent Index[63]. However, as noted in TD's Digital Divide Between Canadian Cities[64] , tech gains and economic growth are increasingly being concentrated in Canada's largest cities. To avoid this risk, the Southwest Alberta Skills Partnership needs to leverage Calgary's growing status at a tech hub to support regional, not concentrated growth. Critical takeaways for growing and retaining talent were compiled by Made in Canada: How to attract and retain top talent[65]:

- Increase opportunities for students. Expand co-op and internship opportunities.
- Start a mentorship or coaching program.
- Commit to digital literacy.
- Allow employees to grow.
- Demonstrate engagement in the community.

These actions echo a clear theme growing in the workforce development space of collaboration with employers to provide them with job-

[61] Digital Talent: Road to 2020 and Beyond, ictc-ctic.ca/wp-content/uploads/2016/03/ICTC_DigitalTalent2020_ENGLISH_FINAL_March2016.pdf

[62] Calgary in the New Economy, calgaryeconomicdevelopment.com/assets/Calgary-in-the-New-Economy/Calgary-in-the-New-Economy-Final.pdf

[63] 2019 Scoring Canadian Tech Talent, cbre.vo.llnwd.net/grgservices/secure/2019%20Canada%20Scoring%20Tech%20Talent%20EN-final.pdf?e=1585318024&h=3195a6fa9a222af7485383cc652e3d83

[64] The Digital Divide Between Canadian Cities, economics.td.com/bridging-the-digital-divide

[65] Made in Canada: How to attract and retain top talent, theglobeandmail.com/report-on-business/careers/leadership-lab/made-in-canada-how-your-organization-can-attract-and-retain-top-talent/article35654124/

ready employees, increasing their hands-on experience[66]. A significant component driving this is the disconnect between educators and employers; McKinsey & Company[67] reported 83% of educators felt youth are ready for work, 34% of employers and 44% of youth agreed. While the majority of this focus has been on new graduates, there has been significant research on continuing education to help those active in the workforce upgrade their skills to meet the needs of their current employers or switch to sectors with more opportunities.

Understanding which jobs are in demand is an essential aspect of the project, but focusing on the quality of jobs to pursue is a necessary component. Recently, Indeed, Canada published a report indicating the top in-demand jobs in Canada[68] , and four of the top ten are low paying with relatively low advancement opportunities. The Brookings Institute's Opportunity Industries Report[69] focuses on workers without a four-year college degree and the concentrations of "good jobs" (jobs that pay the area's median annual earnings and include health insurance) and "promising jobs," entry-level jobs that provide a pathway to good jobs). Understanding which career paths align with the promising and good jobs in the Southwest Alberta context will be essential to successfully promoting training opportunities in the skills that lead to higher quality employment. Particularly relevant in assessing the quality of work is the conversation around science, technology, engineering, and math (STEM) and highly digital occupations[70] , which have seen wages increase vs. other sectors of the economy with the same level of education[71].

A key challenge for many of the members of the Southwest Alberta Skills Partnership will be aligning their unique value propositions to the desires of the skilled workers they would like to attract and retain within their communities. According to a study by Area Development, millennials have made their preferences clear: 88 percent say they want to live in an urban environment within a close distance to their jobs[72]. With many of the partners representing more rural jurisdictions, a deeper understanding of what their target workforce wants will be critical to attracting them.

[66] Seeking Tech Talent, Companies Kickstart Apprenticeship Programs, wsj.com/articles/seeking-tech-talent-companies-kickstart-apprenticeship-programs-11580396400?mod=searchresults&page=1&pos=7

[67] Youth in transition Bridging Canada's path from education to employment, cacee.com/_Library/docs/Youth_in_transition_Bridging_Canadas_path_from_education_to_employment_2_.pdf

[68] Fastest-Growing SMB Jobs in Canada, blog.indeed.ca/2018/05/23/fastest-growing-smb-jobs-canada/

[69] Brookings Institute, Opportunity Industries Report, brookings.edu/wp-content/uploads/2018/12/2018.12_BrookingsMetro_Opportunity-Industries_Report_Shearer-Shah.pdf

[70] Digitization and the American Workforce, brookings.edu/wp-content/uploads/2017/11/metro_20171115_digitalization-and-the-american-workforce-infographic.pdf

[71] 7 facts about the STEM workforce, pewresearch.org/fact-tank/2018/01/09/7-facts-about-the-stem-workforce/

[72]The War for Talent, areadevelopment.com/skilled-workforce-STEM/workforce-q4-2018/war-for-talent-battle-for-employee-attraction-retention.shtml?utm_source=Area+Development+Site+%26+Facility+Planning+Newsletters&utm_campaign=69e910a516-SFP_Insider_12_20_2018&utm_medium=email&utm_term=0_94850a8d43-69e910a516-302717633

7. Appendix Background Document Review

1.1.1 Lethbridge 2013 Economic Indicators of Industry

Purpose: This report looks at economic indicators such as corporate revenues, current and anticipated workforce levels, export locations and areas of investment based on a 2013 survey. The survey was for 47 medium and large size companies in Lethbridge and included manufacturing, agri-food, supply chain and logistics, construction and information technology

Key Takeaways & Workforce Development Considerations

- On average, the largest employers who operate head offices in Lethbridge were in the sectors of construction and transportation
- The average reported an increase for companies that augmented their workforce (getting work done through IT) this past year was 13%. These companies were relatively well distributed across industries and sizes, with sizable increases being noted by both large and small organizations
- More than 50% of the surveyed companies employ less than 100 workers
- The majority of companies have maintained or increased their workforce in the past fiscal year with 51% increasing their workforce 26% maintaining their workforce 4% reducing their workforce
- Companies at the time of this report were anticipating comparable average growth of 12% (or roughly 260 new jobs) compared to the previous fiscal year

1.1.2 Lethbridge Community Outlook 2015-2022

Purpose: The Community Outlook Report evaluates the current state of the City of Lethbridge to provide a snapshot of how well the City is positioned to continue to prosper and to balance the needs of the community through time.

Key Takeaways & Workforce Development Considerations

- In 2015, the total number of people employed within Lethbridge was estimated to be 44,713 with a ratio of employees to the population of 0.47
- Population growth in Lethbridge has traditionally been stable, averaging about 1.7% annually.
- Unemployment in the Lethbridge-Medicine Hat region was 5% in 2015
- The participation rate of 67.2% was the highest annual figure since 2012 and growth is expected to be spread amongst the different employment categories relatively evenly

- By 2022 the total number of people employed within Lethbridge is expected to increase by just under 4,400 to a total of 49,096
- The reason for a projected decrease is due to an ageing population with more retirees living in Lethbridge who are no longer employed
- The major expansion to the University of Lethbridge is currently underway with a significant new building expected to open and expected to lead to educational services seeing the largest employment gain of any other city sector
- While increasing labour force participation rates are expected in the coming years, the lifecycle pattern of labour force participation declining through older age groups suggests that these increases will only partially offset the loss of labour supply as the baby boomers age towards retirement
- For every senior who is actively participating in Lethbridge's workforce today, there would be 2.2 people aged 65-plus by 2041
- Overall, South Lethbridge contains the majority of employment in the City with 24,802 or 56% of all employees working in this sector of the City, and North Lethbridge contains 15,785 or 35% of all employees
- West Lethbridge is the largest sector of the City in terms of population but is the smallest in terms of employment as only 4,126 or 9%
- The three largest employment categories were retail healthcare and social services and accommodation and food services. all told, these three categories composed 42.7% of all employment in Lethbridge
- With eight of Lethbridge largest employers being in the public sector, Lethbridge has benefited with growth in public administration, health and education
- Continued growth in traditional industries such as agri-business and manufacturing will also benefit Lethbridge in 2016 and 2017
- Most industrial type jobs such as those found in the Manufacturing, Transportation and Warehousing and Construction employment categories are found in North Lethbridge
- South Lethbridge where Lethbridge College is located has 41% of the City's total educational services staff, while West Lethbridge where the University of Lethbridge is located has 44%
- Educational services are a major strength in Lethbridge.
- There are few energy companies located in Lethbridge and helps to explain why the recent downturn in oil prices has not had a large impact on the local economy when compared to the rest of the province
- Mining and Oil and Gas Extraction has a relatively small business footprint in Lethbridge and makes up only 0.26% of all employment in the City
- Employment growth may ultimately be limited by the rate of anticipated growth in population

1.1.3 Lethbridge Economic Trends & indicators Spring 2016

Purpose: The report provides a snapshot of the type of economic information that we track to understand trends in areas such as new developments, labour force, housing markets and economic growth as of Spring 2016.

Key Takeaways & Workforce Development Considerations

- Public sector employment in Lethbridge remains strong, with nine of the top 10 major employers in health care, education, and government services. Public sector employment accounts for 20% of the employed workforce in the City.
- Lethbridge had the lowest average unemployment rate of all Alberta jurisdictions in 2015, with a 4.0% annual measure.
- Annual population growth in Lethbridge has averaged 2.1% over the past decade, which is in line with the stable growth that epitomizes our City.

1.1.4 Lethbridge Economic Trends & Indicators Fall 2016 Report

Purpose: The report provides a snapshot of the type of economic information that we track to understand trends in areas such as new developments, labour force, housing markets and economic growth as of Fall 2016.

Key Takeaways & Workforce Development Considerations

- Public sector employment in Lethbridge remains strong, with nine of the top 10 major employers in health care, education, and government services. Public sector employment accounts for 20% of the employed workforce in the City
- 2.1% population growth exceeds the five-year average in Lethbridge between 2011 and 2015 of 1.8%
- The provincial unemployment rate was up 2.8 percentage points compared with the first half of 2014 which is around the time that broad-based oil price declines were witnessed
- The unemployment rate in the Lethbridge-Medicine Hat region averaged 6.9% over the first half of 2016, the lowest comparable rate in the province over this time
- The participation rate in the Lethbridge-Medicine Hat region averaged 69% over the first six months of 2016, up 3.1% from the same time in 2015 and the largest appreciation for any Alberta region so far this year

1.1.5 Lethbridge Economic Trends & Indicators 2016 Year-End Report

Purpose: This report provides a snapshot of the type of economic information that we track to understand trends in areas such as new developments, labour force, housing markets and economic growth.as of the end of 2016.

Key Takeaways & Workforce Development Considerations

- Lethbridge witnessed the fastest annual population growth of any mid- to large-sized Alberta city that conducts an annual census in 2016 (2.1% growth in Lethbridge vs 0.4% in Calgary and -1.0% in Red Deer)
- For the second consecutive year, Lethbridge had the lowest annual unemployment rate (5.9%) of any Census Agglomeration or Census Metropolitan Area in the province in 2016
- The annual unemployment rate in Alberta was 8.2% in 2016, an increase of 2.2 percentage points from the year prior. This represents the lowest comparative figure since 1994
- The participation rate in the Lethbridge-Medicine Hat Economic Region was 69.5% in 2016, up 2.3 percentage points on a year-over-year basis. This was the biggest increase among all comparable regions in Alberta
- The annual participation rate in Alberta was 72.5% in 2016, the lowest comparative figure since 2001.

1.1.6 Lethbridge Labour Force Semi-Annual Update 2019

Purpose: The profile provides an overview of the labour force status in Lethbridge and an in-depth industry-based analysis.

Key Takeaways & Workforce Development Considerations

- The Lethbridge participation rate has been on the rise over the last few months
- Manufacturing and Health Care positions have been on the rise locally which represents positive momentum for the area
- Full-time job positions are down 7% compared to the year before which is a factor in higher unemployment in the first half of 2019
- The Manufacturing sector witnessed an uptick in jobs over the first half of the year, with employment in this industry up by an aggregate average of 2,000
- Health Care & Social Assistance (+1,400) and Wholesale & Retail Trade (+1,400) were other sectors witnessing substantial gains
- Throughout the first half of the year, Health Care was the second-largest local employer by industry (average of 20,500 employees) while manufacturing was fourth-highest (average of 12,800)
- The largest job losses were concentrated in Construction (-2000). With no substantial new projects yet announced, there is the potential this trend could continue
- Public Administration was another sector of importance that witnessed a retraction in employment over the first half of the year with jobs declining by 1,500

1.1.7 Lethbridge 2019 Brighter Together Report

Purpose: The report is based on a major employer's survey, which provides valuable information to potential businesses and the community regarding economic health. It also provides economic development organizations with information on how to help existing small to medium-sized businesses succeed and potentially grow into major employers if they are ready to take that step.

Key Takeaways & Workforce Development Considerations

- More than 40% of businesses expect to increase their labour force in the next 6-12 months, with a similar proportion projecting increased operational spending over the same period
- The total number of businesses has increased by 1% over the past two years
- Mid-sized businesses (defined here as 20-99 employees) witnessed the strongest growth
- There was a decrease of 3% in the number of major employers
- There was an increase of 4% in mid-sized and 1% in small businesses in the Lethbridge CMA between 2017-2019

1.1.8 Lethbridge Economic Trends & Indicators 10 years in Review

Purpose: This sector profile highlights the impact and opportunities for growth within the Region over the last ten years.

Key Takeaways & Workforce Development Considerations

- Lethbridge started to shed jobs in 2009 like the other cities, but that loss was not as severe or as quick as it was in the other comparable centers
- Lethbridge has the most stable population growth trend of all mid to large cities in Alberta with a Population grown of 1.5-2% per year

1.1.9 Lethbridge Labour: Critical & Complex – March 2015

Purpose: This whitepaper compares and contrasts the local and provincial labour situations and discusses the perspectives local employers have as well as the issues they face. It also includes a summary of recommendations put forth by experts and thought leaders to improve the current state of labour, from the perspective of business, education, and government.

Key Takeaways & Workforce Development Considerations

- From an international perspective, the main issues with regards to labour are a skills mismatch, persistent unemployment, and elevated youth unemployment
- From a national lens, the issues of priority include skill mismatch, elevated youth unemployment, cutbacks in worker training,

immigration effects

- Major trends include the increase of older employees in the workforce, longer hours for employees, a shortage of medium- to low-skill workers, and the effects of immigration-related to changes
- Local businesses remain most concerned about their inability to find qualified candidates and retain staff
- Elevated shortages are witnessed in the Food & Beverage, Trades & Industrial and Retail & Sales employment areas
- A skills mismatch can be linked to the impact of technology on modes of production and the disappearance of traditional manual low-skilled jobs
- Over-education and over-skilling coexist with under-education and under-skilling, and increasingly with skills obsolescence brought about by long-term unemployment
- Less than half of employers who were polled in a survey indicated that graduates are adequately prepared to enter the job market, and one in three employers reported difficulty filling positions as a result of a lack of suitable candidates
- Informal employment among young people remains pervasive, and transitions to decent worker are slow and difficult
- The increase of 18.8% from 2003-2013 of employment rate among people over 65 years old in Alberta exceeds the national rate
- The top 20 labour shortages are dominated by low to medium skill level occupations. That are typically filled by younger workers, recent immigrants or temporary foreign workers
- Top vacancies by job classification included trades and industrial, business, agriculture, food and beverage and retail and sales
- One area of recommendation focused on expanding just-in-time training and programs for in-demand jobs and enhancing opportunities for secondary and post-secondary students to learn about career paths and opportunities
- Another suggestion was to create more opportunities for students to meet and network with industry
- Suggestions for the industry included training apprentices and to offer incentives for staff willing to work with these employees, providing more training and engaging more students to in-demand jobs through marketing materials and participation in career fairs

1.1.10 Calgary's Talent Needs: Challenges and Opportunities

Purpose: This report lays out the present and potential future opportunities within the tech sector and challenges related to attracting tech workers to maximize entrepreneurship and foster growth for tech companies in the region.

Key Takeaways & Workforce Development Considerations

- The number of tech jobs in Calgary has increased by 5 percent in the past 12 months and 27.5 percent growth in employment of

Software Developers & Programmers in the same period

- Calgary is feeling the pressure of filling the demand for tech talent with approximately 2,000 open technology jobs. This is mentioned only to be the beginning of the demand curve for this Talent
- With a job growth rate in tech that doubles that of the overall economy in the coming years, total employment in key digital roles in Alberta is expected to surpass 77,000 by 2023
- Approximately half of all digital jobs in Alberta are and will be in Calgary
- 36 percent of tech companies in a survey stated that lack of digitally skilled Talent as inhibiting their plans for growth
- A problem that is not helping with the skills shortages the lack of adaptability in the post-secondary school system. This makes it harder to approve new degree/diploma programs and tougher to attract foreign students
- Ways of tackling a shortage of tech talent are to implement a technology talent stream for immigration which waives the need for Labour Market Impact Assessments and to speed up the process of bringing new post-secondary programs to market
- Ways of tackling the challenge in increasing number of tech entrepreneurs are to Increase the number of Startup Visa entrants into Alberta and create specialized immigration stream for angel investors

7.1.1 Growing Our Economic Future Regional Economic Development Strategy

Purpose: This report sets a roadmap for attaining a collective vision of growing economic prosperity, backed by a thoroughly researched and consultation-informed action plan framework. The Strategy applies to the Town of Taber, Municipal District (MD) of Taber and Town of Vauxhall, as well as communities across the region that stand to benefit from its strategic objectives.

Key Takeaways & Workforce Development Considerations

- Agriculture is an important section of the economy in the Taber region, and the large-scale acreages are well poised to take advantage of new advanced and precision agriculture techniques.
- Fracking in Southern Alberta provides an opportunity for cleantech firm attraction because there has been progressive investment in wastewater cleaning technologies by Canadian firms.
- As an agricultural hub, the Taber region is well positioned to develop its culinary tourism offerings.

7.1.2 Sprouted: The plant ingredient opportunity taking root on the Prairies

Purpose: This report highlights the demand for protein, including plant-based protein, and other plant-based ingredients, is

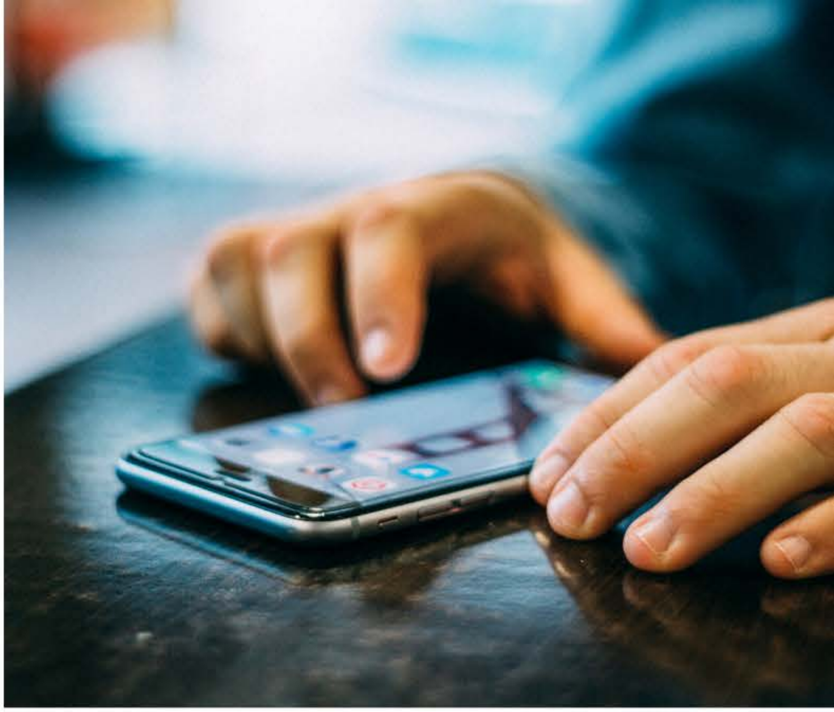
Growing and that Canada's Prairie provinces are well-placed to dominate the non-soy plant ingredient processing sector.

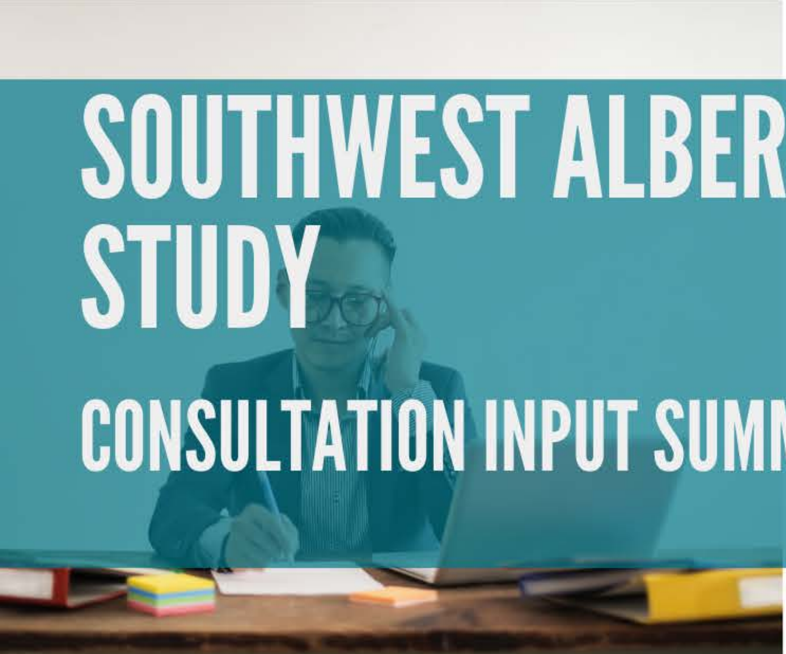
Key Takeaways & Workforce Development Considerations

- Plant-based protein and plant-based ingredients demand is rapidly growing, creating opportunities for primary production and value-added processing.
- In addition to food and beverages, plant-based ingredients are in high demand for use in nutraceuticals, pharmaceuticals, cosmetics, pet food and animal feed.
- The demand for plant-based protein alone is already valued at more than US$8 billion and growing rapidly, and this is only one of the ingredients that can be extracted from crops.

MDB
INSIGHT

MDB INSIGHT





SOUTHWEST ALBERTA REGIONAL SKILLS STUDY

CONSULTATION INPUT SUMMARY REPORT

Contents

1. Introduction

A wide range of inputs from approximately 780 individuals within Southwest Alberta has helped form this input summary report. Drawing from the extensive consultative initiatives that were held between February and June 2020, this report offers a synopsis of the emerging themes and priorities that have evolved through a comprehensive analysis of all inputs. It is these themes and priorities that reflect the perceptions of participants. The identification of these emerging themes and priorities is intended to inform the Southwest Alberta Regional Skills Strategy that will influence and inform planning and actions for the region and its municipalities over the coming years.

2. Stakeholder Consultations

Stakeholder consultation is essential to understanding what the needs and perspectives of stakeholder groups are in the Southwest Alberta Region. It shapes the nuanced understanding of the region and assists in grounding elements of the strategic planning process. The following engagement and consultation activities have contributed to this initiative:

	Regional Employer Survey Part One and Two: Employer surveys were completed across the Southwest Region through direct telephone interviews and supplemented with an online web link to allow for flexible participation. The activity was interrupted as a result of the emergency measures put in place due to COVID-19, resulting in a business shutdown. To best accommodate business participation, the survey activity was split into two timeframes to align with business closing and openings. Part one ran until mid-March, resulted in 309 completes. To achieve the goal of 400 total completes, the survey was relaunched in late May, resulting in an additional 95 completes, surpassing our goal. The part two survey was revised to include several COVID-19 specific questions to inform how the pandemic has influenced skills requirements. The surveys probed workforce demand, skills need, challenges, and immigration considerations.
	Regional Jobseeker Survey Part One and Two: Similar to the regional employer survey, the launch of the job seeker survey was interrupted as a result of the emergency measures put in place due to COVID-19. The survey targeted job seekers that were unemployed, underemployed, or employed and looking for new opportunities. The survey was available through a web-based linked and resulted in 56 online completes in Part 1, which launched in early March and closed in mid-March. For the relaunch in late May, the survey was revised to include additional questions that were focused on COVID-19 impacts. Part two resulted in 215 completes for a total of 271 completed surveys. The Southwest Alberta Skills Partnership organizations promoted the survey broadly across the region to maximize awareness and engagement and offered a prize draw to promote participation.
	Industry Roundtables: To garner direct input from local industry representatives, three industry roundtables were conducted with a focus on geography representation from SouthGrow, Southwest, and Lethbridge. Sessions were held via Zoom, with 35 participants

	across all three. Discussions informed on the labour market situation and talent pipeline in the region.
	Key Informant Interviews: A total of 35 key informant interviews were completed with identified stakeholders throughout the region; these included educational representatives, businesses, immigration service providers, local government, and workforce service providers.
	Education Roundtable: An education roundtable was conducted via Zoom to gather perspectives from education and training representatives on the labour market situation and talent pipeline in the region. A total of 12 individuals participated in this session.
	Immigration Roundtables: Working in collaboration with Lethbridge Local Immigration Partnership (LIP) / Lethbridge Family Services, two roundtables were conducted via Zoom. The first session engaged immigrant-serving organizations and some local businesses to gather perspectives on immigrant integration to the workplace and into the community. The second session engaged new immigrants to the region. A total of 20 individuals participated in these sessions.

The summary findings of the perceptions of those that contributed through the engagement activities follow. These observations reflect the views, perceptions, and opinions of the respondents.

3. Consultation Input Summary

Collected inputs provided local insights and perspectives necessary to inform strategic directions for a targeted and custom strategy and action plan, designed to identify solutions to the current skills gap in the area and strengthen talent attraction and retention. Key findings from these consultations are included in the following subsections. Detailed results, including breakdowns by the community, are in the Appendices.

3.1 Survey Results Key Findings – Business and Job Seekers

Two surveys were conducted to gain perspective on the local workforce and identify any gaps that exist in skills, experience, or training. The first was an online survey of local job seekers that was completed in two phases: the first from February - March 2020, and the second from May 15 - June 29, 2020. The second was a survey of local organizations that employ workers in the Southwest Alberta region, which was also done in two phases: February - March 2020, and June 1 – June 10, 2020. The first phase of each survey was collected before the COVID-19 pandemic in Canada, and the second phase was collected during the recovery phase.

For this reason, select COVID-19 impact-related questions were included in the second phase survey, and all questions were compared across the two phases. This summary showcases the key findings from both phases of the surveys, including an analysis of how the surveys changed over this period.

Business Optimism in the Region

Overall, businesses had very high satisfaction with operating a business in Southwest Alberta throughout both phases of surveys. For example, 91% of respondents reported they were 'very satisfied' or 'somewhat satisfied' with doing businesses in Southwest Alberta in the first pre-COVID-19 businesses survey, and 95% during the second phase survey.

Further, across all workforce factors that were rated in the business surveys, the respondents in phase 2 of the survey tended to have more positive perceptions than those in phase 1. Businesses rated all of the potential challenges to recruiting, hiring, and retaining employees as less of a factor. They also tended to respond that they were more satisfied with the workforce attributes mentioned.

Evidence of Skills and Experience Gaps

The phase 1 employer survey results strongly indicated evidence of a skill gap, with 48% of respondents indicating they had experienced a challenge during the recruitment or retaining of talent. Phase 2 results also supported this claim, with 57% of respondents stating that difficulties with labour retention was either 'very likely' or 'somewhat likely' to impact their decision to remain operating in the region. Furthermore, when asked to rate their level of satisfaction on several criteria, respondents were 'most dissatisfied' with the availability of experienced workers in their industry (11%) and the availability of a diverse workforce to recruit from (8%). However, the second phase survey results indicated that businesses' perceptions of local factors (e.g. talent availability, housing, transportation, etc.) had improved compared to the first phase results.

From a job seeker perspective, the critical insight from the phase 1 survey was that 85% of local job seekers had listed a lack of suitable job opportunities as 'a significant factor' or 'somewhat of a significant factor' hindering them from getting a job.

Phase 2 results also supported this insight, with 87% of respondents listing this as a critical issue preventing them from gaining employment. The phase 2 job seeker survey also found that a lack of adequately paying jobs was a contributing factor hindering their ability to gain employment, with 70% rating this as either 'significant' or 'somewhat significant.'

Need for Educational Programming and Training

An observation across both phases of surveys has been that while there is a relative abundance of employees with educational qualifications, employers do not feel this education is translating into a large adequately trained talent pool. For example, when asked about workers with the appropriate level of education, 25% of business survey respondents in phase 1 were extremely satisfied; however, 18% tended to be dissatisfied with the 'availability of a locally trained workforce.' In the phase 2 business survey, 32% indicated a high level of satisfaction regarding workers with the appropriate level of education; and 11% were 'very dissatisfied,' and 8% indicated the same regarding the availability of a trained local workforce. Overall, these results indicate that while employees may have solid educational qualifications on paper, their level of training and ability to 'perform ' into a job context is lower and would benefit from additional tailored training and support services.

From the perspective of a job seeker, this insight is also supported, with phase 1 results finding that 85% of job seekers thought a lack of suitable job opportunities as 'somewhat of a factor' or 'a significant factor' hindering them from getting a job. Interestingly, results from the phase 2 survey found that the impacts of COVID-19 rendered the respondents more likely to consider employment in occupations they had not considered in the past (79%).

Workforce Development Support Services are Desired by Jobs Seekers & Employers

Regarding specific types of educational training and support activities needed in the region, the results were mixed. From the business side, employers in the phase 1 survey were highly satisfied with professional development opportunities available for staff (26%), with 31% of respondents indicating that they spent around $250 per employee on professional development activities each year.

Conversely, job seekers felt that more professional development opportunities, particularly regarding soft and core skills training and employment counselling, would increase their level of employability. Mentorship and more training on the job were critical aspects to increasing their likelihood of employment, as noted across both surveys. Businesses also mentioned in the second phase survey that they expect the most in-demand occupations across the next 12 months to be in skilled trades (28%), the sales/service sector (26%), and the clerical and administrative sector (17%). Ensuring local training services are aligned to these upcoming demand occupations should be a core priority for the region moving forward. However, businesses indicated they were highly satisfied with existing government and non-profit/community support activities, with 83% reported being either 'very satisfied' or 'somewhat satisfied' for this question.

Increased need for marketing efforts of the region

In phase 2 of the employers' survey, one of the factors that had moved up in priority compared to phase 1 was the 'marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace.' Tourism and individuals' ability to relocate can be an essential factor to address some of the challenges that employers have mentioned frequently (such as a lack of qualified candidates in the region). The job seeker survey found, there was a significant decrease in the percentage of respondents who were currently employed. Hence, as the economy recovers from COVID-19, it can be expected that a larger group of job seekers will be looking for new employment opportunities and potentially re-evaluating the region where they live and work. Therefore, the post-COVID economy will require attention to talent retention, along with talent attraction.

Impacts of the COVID-19 pandemic

The timing of the second phase business and job seeker survey was intended to capture local perceptions on the impact of the COVID-19 pandemic from both a supply and demand perspective. Based on businesses' feedback from the second phase survey, respondents were clear that the pandemic had impacted local business productivity significantly, with 71% of businesses indicating that business activity had 'decreased significantly' or 'slightly' during the crisis. However, employer respondents acknowledged a focus on staff retention activities compared to terminations, with 36% of respondents only temporarily laying-off their workforce, whereas 17% of respondents indicated they terminated staff contracts. However, approximately 35% of respondents stated that they had re-hired previously laid off staff. Overall, this trend towards employee retention can be attributed mainly to the Federal Government employee retention program, which included the Canadian Emergency Response Benefit (CERB). The region should closely monitor employee retention and rates of layoffs versus termination as the wage subsidy funding begins to be removed.

Conversely, from the job seeker perspective, COVID-19 is impacting individuals' career choices and levels of confidence in gaining employment. For example, 79% of respondents mentioned they were 'very likely' or 'likely' going to consider employment in occupations that they may not have considered in the past. Equally, students, particularly recent graduates, have been some of the hardest hit during the pandemic as local firms enact strict new hire freezes. Many are turning towards workforce training and education support services to assist them in finding employment or re-enrolling in further education programs such as a masters program to wait out the worst effects of the crisis. This is a common strategy in times of economic downturn. What is different this time, is the shift in program delivery to either online learning or a blended approach, much of which is still be determined within the post-secondary sector.

3.2 Education Roundtable Key Findings

An Education roundtable session was held via Zoom on June 3rd, 2020, to gather the perspectives of education and training sector representatives on the labour market situation in the region. This included:

- Engaging in an in-depth conversation that allowed for exploration of findings from the phase 1 business survey and gathering insight into the "what is happening."
- Understanding the challenges facing Educators locally
- Exploring approaches being utilized to respond to challenges
- Testing the labour market profile with "on the ground" experience.

3.2.1 Emerging Key Themes

- **Better Labour Market Information & Intelligence:** Throughout discussions, the need for better labour market information was identified.
- **COVID-19**: The pandemic is creating a great deal of uncertainty, creating high unemployment, and shifting the skills required by employers
- **Improving Accessibility:** Both online training and micro-credentialing is a crucial focus of several institutions
- **Employer Investment:** Encouraging employers to invest in training is a goal for many institutions
- **Experiential Learning:** There is broad consensus that youth need to have more opportunities for experiential learning, including tours, co-ops, and internships
  - Participants agreed that new graduates are having difficulty articulating soft skills and experience when they apply for their first job, making it more difficult for them to find employment
- According to educators, the top challenges facing employers are:
  - Soft Skills, disconnect between employers and job seekers, COVID Uncertainty and Difficulty clarifying soft skills and experience
- The top challenges the education sector is facing are:
  - Funding, New program competencies in skills areas, Employers not funding professional development
- There is a consensus that due to lack of funding and the need to be more active, education institutions will need to work together with industry to:
  - Develop and access LMI including alumni tracking
  - Provide more up to date, flexible and online programming
  - Connect students to jobs through increased awareness of opportunities
  - Improve Experiential Learning

- There is a consensus that a wide variety of excellent programs are available but not always easy to access or that lack awareness, highlighting the need for improved LMI and coordination.

3.3 Industry Roundtables Key Findings

Three Industry roundtable sessions were held via Zoom on May 28th, June 10th, and June 18th, 2020. The focus of these roundtables was to:

- Engage in a more in-depth conversation that allows for exploration of findings from the business survey, gathering insight into the "what is happening."
- Understand the challenges facing employers locally
- Explore approaches employers are utilizing to respond to challenges
- Test the labour market profile with their "on the ground" experience

3.3.1 Emerging Key Themes

Top Workforce Challenges Employers are Facing

- Soft Skills
- Wages (High Expectations)
- Attracting Workforce to the Region
- Continuous learning access and support
- Recruitment
- Transition Training

Talent Recruitment

- Attracting the workforce to the region is difficult, influenced by a lack of awareness of the area and what it has to offer in lifestyle and work opportunities
- Most employers source all their employees from the local region with a few agricultural firms using the temporary foreign worker program
- The ratio of new grads to retirees concerns several businesses, mainly in the trucking industry
- Employers want to make the process of connecting with students more manageable and less labour intensive
- Employers suggested making co-ops mandatory
- Fort McLeod businesses reported success in attracting and retaining workers from the Philippines, helping to develop a local community that supports newcomers

Access to Training

- Access to training remotely in a cost and time-effective manner is a concern
- Micro credentialing, including a system of recognition of soft skills, is an area of interest for employers

- There is a lack of awareness of all the programming and supports that exist in the region
- There is a clear desire to collaborate more closely with Secondary and Post Secondary institutions to improve student awareness of local opportunities, career pathways and experiential learning
- Employers would like to see KPI's relating to post-secondary outcomes, placements, and retention in the region
- Employers are also interested in collaborating on training to make it more accessible locally and at a lower cost, particularly in LEAN Manufacturing

Workforce Occupation Gaps

- Sheet metal mechanics
- Engineers
- Technologists
- Production Staff (Technology Ready)
- Management
- LEAN Trained
- Mechanical Millwrights
- Qualified truckers

Skills Gaps Employers identified

- Leadership
- Communication
- Continuous Learning mindset
- Divers Licenses
- Soft Skills
- Digital Literacy (HTML)

3.4 Immigration Roundtables Key Findings

Two Immigration roundtable sessions were held via Zoom. The first was held on May 12th and engaged with service providers and select employers, while the second was held on May 26th and engaged new immigrants to Southwest Alberta. These sessions were designed to gather the perspectives of immigrants and immigrant service providers on local challenges related to immigrant integration into the community and the workplace, skills needs in the labour market and to identify opportunities to strengthen labour market alignment and talent development.

3.4.1 Emerging Key Themes

Service Provider Session

- The service providers agree there are significant barriers to attracting and retaining immigrants in the Southwest Alberta Region
- There are a wide variety of services available to support both businesses and immigrants, but there have been disconnects in both awareness and access
- There is a desire to collaborate and engage with additional partners to improve services and access

Immigrant Session

- Newcomers are facing barriers in getting jobs and integrating into Southwest Alberta, including:
  - English as a Second Language (ESL)
  - Getting their first job and in Canada
  - Getting recognized Canadian experience or references
  - Recognition of skills as compared to credentials
- Supports requested include:
  - Improved access to existing services
  - Transition programming
  - Career bridging
  - Job shadowing and
  - Resume writing
- Participants would like to encourage employers to be more open to hiring immigrants and have more inclusive corporate cultures
- There is a desire to see improved collaboration and continued promotion to increase the accessibility of information and services to the immigrant community

3.5 Key Informant Interviews Key Findings

A total of 35 key informant interviews were completed with select stakeholders in the region; these included educational representatives, businesses, immigration service providers, local government, and workforce service providers. These interviews were designed to identify skills gaps in the region and better understand how to address workforce challenges.

3.5.1 Emerging Key Themes

Availability of Talent

- Interviewee opinions were diverse when asked about the general availability and quality of talent
- A significant number of interviewees mentioned large numbers of unskilled or lower-skilled workers are currently looking for work in the region and seem to be applying for jobs indiscriminately, creating challenges for the hiring staff of local businesses
- Some firms that require more specialized skillsets identified challenges in finding skilled and experienced professional-level staff in niche industries. Many of these individuals recognized the skill sets they are seeking, are rare in the region, and there is a limited concentration of firms doing similar work. This reduces potential future employment and may impede candidates from relocating to the area. These businesses often cited the importance of internships and co-op training, where they have the opportunity to develop the skills they cannot find in the market.
- One employer is interviewing international candidates from Toronto because graduates from nearby universities were "OK, not great."
- Local entry-level positions do not pay well enough to attract workers from outside the area. Urban centres attract skilled workers willing to drive the distance, creating a brain drain.
- There is lots of work available for people willing to work in 'terrible conditions,' no experience required.

New Generation of Workers

- There are not as many entry-level positions with a broad range of learning opportunities, so young workers or those in transition cannot get foundational work experience skills.
- Stakeholders identified several challenges employers are having with younger workers, leading to higher turnover and training costs.
- Young people want flexible hours, more input and decision-making ability in their work than the previous generations
- Some firms felt young people do not understand the growth opportunities that flow from a minimum wage, entry-level position
- It was noted that career exploration events at school would help young people make more informed career decisions, and HR consultants could help firms better understand the needs of their younger workers
- Employers acknowledged a general lessening of work ethic among job seekers

Wage Competition

Challenges around employers' ability to pay competitive wages were also expressed. Southern Alberta still pays less than other parts of Alberta, which can be difficult for employers when negotiating wages with a talented candidate.

Temporary Foreign Workers (TFW) and Mennonite Workforce

- Low German Mennonites and foreign workers were identified as a source of manual labour, but employers need to be educated on cultural differences. Otherwise, it is difficult to attract workers to the area.
- Some concerns were expressed about a lack of literacy. High school completion rates are low regionally. Many Low German Mennonites live in the area and are not literate in English.
- Employers described the job market as tight, with a lack of qualified individuals.
- Concerns that local training institutions do not offer required programming.

3.5.2 Key Informant Perspective on Job Seeker Challenges

Quality of Employment Opportunities

The key informants interviewed had diverse opinions on the general quality of employment opportunities.

- Many stakeholders referenced the importance of a good match between the employment opportunity and the job seekers' skills and interests.
- For example, new projects are appearing in agriculture that require technical skills for higher-paid roles. However, many mid-level and senior-level professionals' roles, such as human resources management, are not in Lethbridge and are in larger cities such as Calgary.
- Others mentioned a lack of full-time opportunities with individuals working two or three part-time jobs to make ends meet, which empties the pool of qualified candidates.
- Many students and job seekers from other parts of Canada like the area and want to stay, but the length of contracts and hours available is a limiting factor. Eventually, they need to move to a community where employers provide a much more stable income.

Cultural and Wage Mismatch for Youth in Southwest Alberta

- Stakeholders mentioned that youth want to live and work in dynamic and amenity-rich communities to support their personal and professional goals.
- Many feel there is better long-term earning potential in larger cities, and opportunities are limited in Lethbridge, which has a perception of an older rural city.
- It was suggested that organizations need to work with youth to encourage entrepreneurial thinking and help them understand the opportunities that they can create for themselves in these smaller communities.

Gap Between Job Seeker Skills and Employer Expectations

- Stakeholders mentioned that job seekers might find it challenging to find the job they want because they need more experience before obtaining the higher-level role and increased compensation that many young job seekers seek.
- The importance and expectation for job candidates to have soft skills, which are not always prevalent among job seekers, was emphasized.
- Communication skills are particularly crucial for a job seeker so they can communicate their previous experiences and vision for the future both verbally and orally to stand-out from the pool of candidates with the same formal education.
- Key informants felt job seekers are finding it hard to find a job that fits their wage expectancy. It was mentioned that Southwest Alberta's pace of business is slower than larger cities, and job seekers need to slow down the pace at which they want to advance their careers to match the pace of the city. This expectation may be correlated to high wages for relatively low-skilled roles seen in the oil fields relative to the lower wages that require more skills in Lethbridge.
- Key informants also felt jobseekers are challenged to pursue the right education stream for full-time jobs, without going into debt with tuition. Education is costly, and many jobs require specific degrees or certificates that demand individual prerequisites. Jobseekers are concerned the jobs will be gone by the time they complete their training.

Communities are not as welcoming to newcomers

A better job needs to be done on acknowledging cultural differences for newcomers and recognizing education credentials and experience. Accreditation programs tend to be time-consuming and do not help or appear to benefit those already in the trade.

3.5.3 Key Informant Perspectives on Education and Training: Challenges and Opportunities

Challenge - Align Education and Training with Needs of Local Employers

The stakeholders interviewed had diverse opinions in terms of education and local training gaps, depending on their sector.

- The region's many agriculture programs are not offered elsewhere and secure connections to the agriculture community. This alignment between local education/training and the needs of local employers brings young people to the region. Other sectors require local education and training institutions better to align their offerings with the needs of local employers.
- Tech sector course content needs to stay up to date with trends in the sector.
- It was noted that educational institutions could do a better job of promoting and creating awareness of the trades as a viable career option to attract higher-quality applicants to these roles.

Opportunity – Collaboration Between Businesses and Education/Training Institutions

Collaboration between businesses and education/training institutions has increased over time.

- There is more cooperation between high schools and post-secondary to encourage students to consider a variety of different careers.
- Employers mentioned they have continuous opportunities to present to students.
- Local business incubators also act as a link between educational institutions and businesses.
- Co-ops and internships were consistently mentioned as a great way to connect job seekers and employers.

Challenge – Collaboration between industry and education

- Among employers, opinions ranged from wishing educational institutions took business needs more seriously to outright dismissal of the education system – saying business should take care of their training and avoid the educational system.
- Those who work in education and training, believe there are more opportunities for collaboration among various players, specifically businesses and trade associations.
- Post-secondary education institutions could enhance their relationships with local employers by listening to their concerns and addressing them. Lethbridge College's agricultural programs were highlighted as an example for other industries and institutions to consider.
- Some stakeholders reported that post-secondary institutions do not spend enough time promoting their programs at the high school level.
- Business owners also felt students could be introduced to work experiences at a much younger age to develop better expectations for the opportunities in the working world and understanding of the importance of skills and experience to be successful in their careers.

Challenge – Understanding and addressing attitudes of jobseekers and employers

Concerns were expressed about the gap between expectations of both employers and jobseekers, acknowledging that business owners will need to shift their thinking.

- Employers who embrace the realities of attitudes among job seekers, in general, are more apt to retain them for more extended periods.

Opportunity – Enhance work experience programs

The Registered Apprenticeship Program was viewed as a positive program that helps build a connection between youth, educational institutions and employers, providing the all-important on-the-job experience for job seekers and determining if they have a passion for the industry sector or not.

There were negative aspects of the Registered Apprenticeship Program (RAP) (e.g. transportation challenges for apprentices, higher insurance costs for employers), but the benefits outweigh the burden. A similar work experience program could be developed for new Canadians.

Challenge – Who does what

Interviewees felt there were a variety of solutions and opportunities to assist employers and jobseekers but seemed confused about who was responsible. A general lack of leadership, collaboration, and understanding of the next steps were evident.

3.5.4 Specific Gaps Identified through Interviews

Identified Job Gaps

- Lack of entry-level positions
- Millwrights
- Plumbers
- Electricians
- Truck Drivers

Identified Skills Gaps

- Training on technical systems used in agricultural or construction equipment and trucks. Some farmers do not want expensive equipment damaged by an inexperienced worker.
- Digital literacy skills.
- Soft Skills (Communication, Writing)
- Robotics
- LEAN Manufacturing

4. Appendix A Phase 1 Survey Analysis Report

See Attached

5. Appendix B Phase 2 Survey Analysis Report

See Attached

6. Appendix C Immigration Roundtables Report

See Attached

7. Appendix D Education Roundtable Report

See Attached

8. Appendix E Industry Roundtables Report

See Attached

9. Appendix F Key Stakeholder Interviews Report

See Attached

MDB INSIGHT

Alberta Southwest Regional Skills Study
Skills Gap Analysis

August 2020

Funded by:

Acknowledgements

We take this opportunity to thank those that contributed to this important regional initiative, including local businesses, associations, organizations, job seekers, students, educators, and government representatives. Your input has been invaluable.

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Contents

1. Introduction

The Southwest Alberta Regional Skills Gap Study Partnership is a stakeholder collaboration formed to help identify regional skills and competency gaps and explore ways to address them. The partnership is made up of Lethbridge College, Alberta SouthWest, Economic Development Lethbridge, SouthGrow, Community Futures Alberta Southwest, Vulcan County and Town of Taber.

The Regional Skills Gap Study is designed to support greater alignment between job vacancies of local employers with those looking for work. For this study, the Southwest Alberta region is defined as the area spanning east of the BC border, south of Calgary, and west of Brooks.

The goal of this project is a strategy that offers tangible solutions to local and regional challenges related to the labour market, ensuring that resources are being best allocated and that efforts are coordinated for maximum results. The project goals are:

- Understanding the technical and core competency skills gaps in the region, the causes of those gaps and the impact they are having on economic activity
- Identifying methods employers use to address these gaps
- Identifying opportunities for underrepresented groups to fill these gaps with specific training and
- How employers, regional development agencies, post-secondary institutions, and other stakeholders may cooperate to address the challenges.

This report is designed to provide a comprehensive understanding of the specific skills gaps identified through the study area data. Occupation projections were commissioned to identify demand due to economic growth and retirements. Once identified, the top projected occupations were classified by Employment and Social Development Canada (ESDC) as skill level A or B, with A representing those that require university-level education, and B is defined as those requiring College level education. Further analysis informed the relative labour supply from educational institutions in the region.

The data gathered supported the development of occupational profiles that identified specific skills requirements, trends and expected labour supply. The last section of this report includes the development of a shared skills matrix, which highlights the most common transferrable skills between the top occupations in the region. The skills identified in this report have been combined with skills gaps identified through earlier reporting from this initiative, resulting in a broader understanding of the skills needs in the region.

2. Study Area Projected Occupation Requirements 2020 to 2025

The detailed employment by industry projections for the Study Area as a whole and each of the seven constituent sub-areas was transformed into *economic demand* projections for each of the 500 occupations identified in the National Occupation Classification System (NOCS).

Estimates were made, as well, of the number of people likely to retire from each of the 500 occupations within the Study Area looking out to 2020 to 2025. In this model, the *retiree replacement demand* is equal to the expected number of retirees over the five years. It does not reflect potential job elimination or technology impacting the need for replacement workers.

The total number of new hires required for each occupation between 2020 and 2025 is equal to the *economic demand* plus the *retiree replacement demand*. A Microsoft Excel file covering these two demand categories for the Study Area as a whole over the 2020 to 2025 period accompanies this report.

Figure 1 summarizes that table by ranking the 50 occupations representing the highest recruitment demand over the 2020 to 2025 span across the Study Area as a whole. The highlights include the following:

- 4,147 new jobs will be created due to economic expansion
- another 4,227 workers are projected to retire over that period
- thus, the total recruitment challenge is 8,347 against a base of 82,241 employed in 2020
- the total recruitment challenge equals just over 10 percent of all the jobs in 2020
- the top 50 jobs account for two-thirds of the entire recruitment effort faced by the area
- the most significant challenge (426 total recruits) is posed by managers in agriculture (NOCS# 821)
- the second greatest (275) is posed by retail salespersons (6421)
- the third (234) is posed by nurse aides, orderlies, etc. (3413)
- the fourth (232) is posed by registered nurses, etc. (3012)
- the fifth (210) is posed by food counter attendants, etc. (6711)

These top 5 occupations collectively account for 16 percent of the total recruitment in the Study Area. The top 27 occupations account for more than 50 percent of the total demand.

Figure 1: Study Area Projected Detailed Occupation Requirements, TOP 50 - Economic Demand and Retiree Replacement Demand 2020 to 2025

Rank	NOC #	Occupations	Employed 2020	Projected Employed 2025	Economic Demand	Retirees 2020-2025	Total Demand
		Total all 500 occupations	82,241	86,388	4,147	4,227	8,374
1	821	Managers in agriculture	3,396	3,434	38	388	426
2	6421	Retail salespersons	3,262	3,340	78	197	275
3	3413	Nurse aides, orderlies and patient service associates	1,827	1,971	144	90	234
4	3012	Registered nurses and registered psychiatric nurses	1,846	1,996	150	82	232
5	6711	Food counter attendants, kitchen helpers and related support occupations	2,243	2,408	165	45	210
6	621	Retail and wholesale trade managers	2,457	2,515	58	139	197
7	4032	Elementary school and kindergarten teachers	1,452	1,584	132	62	194
8	7511	Transport truck drivers	1,256	1,353	97	93	190
9	6733	Janitors, caretakers and building superintendents	1,125	1,216	91	89	180
10	1221	Administrative officers	1,313	1,392	79	81	160
11	1411	General office support workers	1,272	1,357	85	73	159
12	1241	Administrative assistants	1,211	1,282	71	84	155
13	4413	Elementary and secondary school teacher assistants	1,146	1,251	105	46	151
14	8431	General farm workers	2,223	2,253	30	118	147
15	6731	Light duty cleaners	953	1,034	80	50	131
16	4212	Social and community service workers	1,107	1,191	84	45	129
17	6322	Cooks	1,169	1,255	86	33	119
18	1311	Accounting technicians and bookkeepers	1,076	1,101	25	93	117
19	6232	Real estate agents and salespersons	358	433	75	40	115
20	4031	Secondary school teachers	699	765	66	33	98
21	1414	Receptionists	862	919	57	41	98
22	7512	Bus drivers, subway operators and other transit operators	391	439	48	49	97
23	8612	Landscaping and grounds maintenance labourers	633	699	67	28	95
24	4011	University professors and lecturers	487	532	45	45	90
25	6513	Food and beverage servers	1,077	1,156	80	6	86
26	6611	Cashiers	1,338	1,373	36	46	82
27	1111	Financial auditors and accountants	696	719	23	52	75
28	4214	Early childhood educators and assistants	642	695	53	21	74

Rank	NOC #	Occupations	Employed 2020	Projected Employed 2025	Economic Demand	Retirees 2020-2025	Total Demand
29	631	Restaurant and food service managers	664	715	51	21	72
30	3233	Licensed practical nurses	618	665	46	23	69
31	4021	College and other vocational instructors	426	457	32	35	67
32	6541	Security guards and related security service occupations	355	395	41	24	65
33	6552	Other customer and information services representatives	574	604	30	30	60
34	4412	Home support workers, housekeepers and related occupations	445	476	30	26	57
35	4311	Police officers (except commissioned)	341	394	53	3	57
36	1224	Property administrators	217	247	30	27	56
37	1431	Accounting and related clerks	515	538	22	32	54
38	714	Facility operation and maintenance managers	340	364	23	26	49
39	6622	Store shelf stockers, clerks and order fillers	836	845	10	39	49
40	5254	Program leaders and instructors in recreation, sport and fitness	428	464	36	9	45
41	4012	Post-secondary teaching and research assistants	361	394	32	13	45
42	7452	Material handlers	678	702	24	20	44
43	3414	Other assisting occupations in support of health services	388	417	29	13	42
44	3411	Dental assistants	295	324	29	12	40
45	6311	Food service supervisors	444	477	33	7	40
46	1521	Shippers and receivers	468	481	13	27	40
47	4153	Family, marriage and other related counsellors	279	302	24	15	39
48	4152	Social workers	285	313	27	12	39
49	7321	Automotive service technicians, truck and bus mechanics and mechanical repairers	810	817	7	31	38
50	3112	General practitioners and family physicians	279	304	24	13	38

Source: *metroeconomics*

3. Labour Pool by Skill Level

The only two educational institutions providing skill level A or B training in the region are part of the Lethbridge Service Area, which includes the University of Lethbridge and Lethbridge College.

- During the last five years, the University of Lethbridge has graduated 9,120 individuals, most of them in program bands such as business and languages, social sciences, arts and humanities.
- Lethbridge College has graduated 7,541 individuals since 2015, most of these graduated in areas such as trade and technologies and health science.

Recognizing that these students will go on to pursue a wide array of career paths, some outside of the region, the numbers show a promising trend for the supply of new talent to the area.

If the number of final-year secondary students remains constant for the next five years, this will result in approximately 6,070 new young workers graduating secondary school and beginning post-secondary education/training or entering the workforce. While the number of expected graduates is higher than the anticipated demand for new workers, the region's ability to provide labour will depend on the career paths that these students pursue and the ability to retain that talent. To ensure that there is an adequate number of qualified individuals within each discipline, the region will require a pipeline of young workers that is proportionate to the employment needs and opportunities in the local labour market.

The following table highlights the top projected occupations at skill level C (High School Graduates).

Figure 2: Skill Level C

NOC	2020-2025 Projection Demand	Skill Level	Post-Secondary Program Band	Relevant Graduate Labour Pool (graduates 2014-2019)*
Total (All NOCs)	**8,374**	**N/A**	**N/A**	**N/A**
7511 Transport truck drivers	190	C	N/A (High school graduates)	11,625
6733 Janitors, caretakers and building superintendents	180	C	N/A (High school graduates)	11,625
1411 General office support workers	159	C	N/A (High school graduates)	11,625
8431 General farm workers	147	C	N/A (High school graduates)	11,625
6513 Food and beverage servers	86	C	N/A (High school graduates)	11,625

Source: metroeconomics | LERS Cubes | Alberta Open Data

* The Total number of unique individuals who completed a program at a PSI in the Study Area (University of Lethbridge and Lethbridge College).

3.1 Skill Level A and B Occupation Profiles

To inform the skills requirements more fully in the region, the following section highlights the top 10 projected occupations from skill levels A and B (those requiring University, College Degrees or Certifications). These profiles include:

- Employment and Social Development Canada (ESDC) identified skill level
- National Occupation Code
- Employment Requirements
- Example Titles
- Skills and Knowledge Requirements
- The 6-digit CIP Code Programs being offered in the Study area that teach the skills required to do these jobs at both the College and University level
- The number of students to graduate from these programs in the Study area over the past five years
- The projected number of workers needed to fill these occupations due to retirement and economic growth
- The adjusted supply of graduates based on a 50% retention rate
- Identified relevant trends impacting the future of these occupations.

Skill Level
A

3.1.1 NOC 0821 – Managers in Agriculture

Employment Requirements: Extensive farming experience, obtained as a farm supervisor or specialized crop or livestock worker or by working on a farm, is usually required. A university degree or college diploma in agricultural management or other field related to crop or livestock production may be required.

Example Titles: Apiarist, Apple grower, Chicken farmer, Dairy farmer, Domestic animal breeder, Fruit farmer, Hog breeder, Horse breeder, Maple syrup producer, Market gardener, Potato farmer, Rancher, Seed grower, Sod farmer, Vegetable grower, Vineyard manager, Viticulturist, Wheat farmer.

Skills and Knowledge Requirements: Maintain farm machinery, equipment and buildings; manage overall operation of farm; purchase machinery, livestock, seed, feed and other supplies; organize and co-ordinate planting, cultivating and crop harvesting activities; raising and breeding of livestock and poultry; establish marketing programs; determine the amount and kinds of crops to be grown and livestock to be raised; maintain financial and production records; perform general farm duties; recruit, hire and supervise staff and/or volunteers; processing pig litters; reining; tying; seed cutting; shearing with knife, etc.

6-Digit-CIP Skill Level A (University) Programming:

- 01.0000 - Agriculture, general

Trend Analysis: Agriculture is becoming a high-tech business. Farmers and ranchers are using technology to grow more crops and raise more animals on less land, controls pests and disease, and use data to make faster, better decisions.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
187	N/A	187	93	426

3.1.2 NOC 3012 - Registered Nurses and Registered Psychiatric Nurses

Skill Level **A**

Employment Requirements: Completion of a university, college or other approved registered nursing program is required. Additional academic training or experience is required to specialize in a specific area of nursing. A master's or doctoral degree in nursing is usually required for clinical nurse specialists, clinical nurses, nursing consultants and nursing researchers. Registration with a regulatory body is required in all provinces and territories. Registered psychiatric nurses Completion of a university or college registered psychiatric nursing program is required.

Example Titles: Emergency care nurse, public health nurse, community health nurse, critical care nurse, clinical nurse, occupational health nurse, private duty nurse, registered nurse (R.N.), registered psychiatric nurse (R.P.N.), nursing consultant, nurse researcher, intensive care nurse.

Skills and Knowledge Requirements: Assess patients to identify appropriate nursing interventions; operate or monitor medical apparatus or equipment; provide supportive counselling and life skills programming; provide nursing care; provide consultative services regarding issues relevant to nursing profession and nursing practice; assist in surgery and other medical procedures; participate in community needs assessment and program development; monitor, assess, address, document and report symptoms and changes in patients' conditions; manage home care cases; engage in research activities related to nursing; collaborate to plan, implement, co-ordinate and evaluate patient care, etc.

6-Digit-CIP Skill Level A (University) Programming:

- 51.3801 - Registered nursing/registered nurse (RN, ASN, BSN, BScN, MSN, MScN)

Trend Analysis: Canada will need over 60,000 nurses by 2022. Not only are they currently in demand but they will be for the next 10 years, according to industry-focused organizations such as the World Economic Forum.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
794	N/A	794	397	232

Skill Level
A

3.1.3 NOC 0621 - Retail and Wholesale Trade Managers

Employment Requirements: Completion of secondary school is required. A university degree or college diploma in business administration or other field related to the product or service being sold may be required. Several years of related retail sales experience at increasing levels of responsibility are usually required.

Example Titles: Antique dealer, assistant manager – retail, automobile repair shop manager, bookstore manager, car dealership manager, cattle dealer, clothing store manager, department store manager, pleasure boat dealer, sporting goods store manager, store manager – retail, supermarket manager, variety store manager.

Skills and Knowledge Requirements: Skills management help – management; recruiting and hiring; allocating and controlling resources; evaluating; supervising; analysis help – analysis; planning; projecting outcomes; analysing; information; communication help – communication; interviewing; negotiating and adjudicating.

6-Digit-CIP Skill Level A (University) Programming:

- 52.0201 - Business administration and mgmt., general
- 52.1001 - Human resources mgmt./personnel administration, general
- 52.1101 - International business/trade/commerce
- 52.1201 – Mgmt. information systems, general
- 52.1401 - Marketing/marketing mgmt., general
- 52.9999 - Business, mgmt., marketing, and related support services, other

Trend Analysis: The sector is undergoing disruption as key e-commerce players such as Amazon shift consumer spending online. Traditional retail stores and mangers are now having to compete with large scale global businesses. Yet, the digitalisation of goods and services also offers potential for mangers to transform the retail experience through the influence of tech (e.g. augmented reality etc.). Problem solving, management, comfortability with tech and ability to think forward will be critical skills long term.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,208	N/A	1,208	604	197

Skill Level A

3.1.4 NOC 4032 - Elementary School and Kindergarten Teachers

Employment Requirements: A bachelor's degree in education is required. A bachelor's degree in child development may be required. Additional training is required to specialize in special education or second language instruction. A provincial teaching certificate is required. Additional certification is required to teach English or French as a second language. Membership in a provincial or territorial teachers' association or federation is usually required.

Example Titles: Special education teacher - primary school, remedial teacher - elementary school, teacher-librarian - elementary school, primary school teacher, supply teacher - elementary school, special education teacher - elementary school, English as a second language elementary school teacher, French as a second language elementary school teacher, French immersion teacher - elementary school, kindergarten teacher.

Skills and Knowledge Requirements: Prepare subject material for presentation according to an approved curriculum; participate in staff meetings, educational conferences and teacher training workshops; identify childrens' individual learning needs; evaluate the progress of students and discuss results with students, parents and school officials; develop course content; teach students using lessons, discussions, audio-visual presentations and field trips; prepare, administer and correct tests; lead students in activities to promote their physical, mental and social development and their school readiness; prepare and implement remedial programs for students requiring extra help; etc.

6-Digit-CIP Skill Level A (University) Programming:

- 13.0101 - Education, general
- 13.1302 - Art teacher education
- 13.1303 - Business teacher education
- 13.1305 - Language arts teacher education
- 13.1311 - Mathematics teacher education
- 13.1312 - Music teacher education
- 13.1314 - Physical education and coaching
- 13.1316 - Science teacher/science education
- 13.1318 - Social studies teacher education
- 13.1324 - Drama and dance teacher education
- 13.1325 - Languages arts teacher education

Trend Analysis: COVID-19 has highlighted the fragility of the education sector and multitude of areas in which it can be disrupted. The next generation of teachers will need to be equipped for working in a blended virtual and in-person teaching environment. Further, the selected blending of technology mediums (e.g. video) into the classroom to better engage students will be required as the world becomes ever more connected and over stimulated.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,014	N/A	1,014	507	194

Skill Level
B

3.1.5 NOC 1221/1241 Administrative Officers and Administrative Assistants

Employment Requirements: Completion of secondary school is required. A university degree or college diploma in business or public administration may be required. Experience in a senior clerical or executive secretarial position related to office administration is usually required. Project management certification may be required by some employers.

Example Titles: Access to information and privacy officer, records analyst - access to information, university admissions officer, administrative officer, administrative services co-ordinator, co-ordinator, office services, forms management officer, liaison officer, office manager, planning officer, surplus assets officer, office administrator.

Skills and Knowledge Requirements: Review, evaluate and implement new administrative procedures; establish work priorities and ensure procedures are followed; carry out administrative activities of establishment; administer policies and procedures related to the release of records in processing requests under government access to information and privacy legislation; co-ordinate and plan for office services such as accommodation, relocation, equipment, supplies, forms, disposal of assets; assist in the preparation of operating budget and maintain inventory and budgetary controls; assemble data and prepare periodic and special reports, oversee and co-ordinate office administrative procedures; etc.

6-Digit-CIP Skill Level A (University) Programming:

- 52.0201 - Business administration and management, general
  - 52.9999 - Business, management, marketing, and related support services, other

6-Digit-CIP Skill Level B (College) Programming:

- 52.0201 - Business administration and management, general
- 52.1401 - Marketing/marketing management, general

Trend Analysis: As routine tasks continue to become automated (e.g. file management, data analysis etc.) administration officials will be challenged to perform more high order thinking roles. There is evidence to suggest assistants will have to compete more for full time positions as the workforce transitions closer to a contract-based work model. Additionally, advances in technology such as Artificial Intelligence (AI) and virtual assistants (e.g. Apple's Siri) will continue to improve and transform or replace the job function for admin assistants.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
552	367	919	459	315

Skill Level
B

3.1.6 NOC 4212 - Social and Community Service Workers

Employment Requirements: Completion of a college or university program in social work, child and youth care, psychology or other social science or health-related discipline is usually required. Previous work experience in a social service environment as a volunteer or in a support capacity may replace formal education requirements for some occupations in this unit group.

Example Titles: Income maintenance officer, shelter supervisor, rehabilitation worker – community and social services worker, crisis intervention worker, developmental service worker, family service worker, group home worker, mental health worker, Aboriginal outreach worker, veteran services officer, welfare and compensation officer, child and youth worker, life skills instructor.

Skills and Knowledge Requirements: Obtain information and prepare reports or case histories; appraise clients' needs or eligibility for specific services; implement life skills workshops; assess client's relevant skill strengths and development needs; conduct follow-up assessments; develop, co-ordinate and implement the delivery of specific services within the community; provide suicide and crisis intervention; resolve conflict situations; supervise activities of clients living in group homes and half-way houses; supervise children's visits with parents to ensure their safety; assist offenders in pre-release and release planning; implement substance abuse treatment programs; etc.

6-Digit-CIP Skill Level A (University) Programming:

- 45.0101 - Social sciences, general

6-Digit-CIP Skill Level B (College) Programming:

- 44.0000 - Human services, general
- 44.0702 - Youth services/administration

Trend Analysis: The increase in stimulation via technology and social platforms has already created a crisis of mental health that has been further compounded by the impacts of COVID-19. Social and community service workers will be challenged to service this growing need for nuanced mental health support, potentially over virtual platforms, in a way that is both tailored yet accessible to the masses. Workers will also more likely have to deal with low skilled and minority groups who are predicted to be the most severely affected economically by the shift towards automation.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
219	148	367	184	129

Skill Level
B

3.1.7 NOC 6322 - Cooks

Employment Requirements: Completion of secondary school is usually required. Completion of a three-year apprenticeship program for cooks or completion of college or other programs in cooking or several years of commercial cooking experience are required. Trade certification is available, but voluntary, in all provinces and territories. Red Seal endorsement is also available to qualified cooks upon successful completion of the interprovincial Red Seal examination.

Example Titles: Apprentice cook, journeyman/woman cook, licensed cook, cook, institutional cook, hospital cook, short order cook, dietary cook, grill cook, first cook, second cook, line cook.

Skills and Knowledge Requirements: Prepare and cook complete meals or individual dishes and foods; prepare and cook special meals for patients as instructed by dietitian or chef; plan menus, determine size of food portions, estimate food requirements and costs, and monitor and order supplies; inspect kitchens and food service areas; train staff in preparation, cooking and handling of food; order supplies and equipment; supervise kitchen staff and helpers; maintain inventory and records of food, supplies and equipment; clean kitchen and work areas; recruit and hire staff; organize and manage buffets and banquets; manage kitchen operations.

6-Digit-CIP Skill Level A (University) Programming:

- N/A

6-Digit-CIP Skill Level B (College) Programming:

- 12.0500 - Cooking and related culinary arts, general
- 2.0503 - Culinary arts/chef training

Trend Analysis: Population and income growth are expected to result in greater consumer demand for food at a variety of dining places. People will continue to eat out, buy takeout meals, or have food delivered. In response to increased consumer demand, more restaurants, cafeterias, and catering services will open and serve more meals. These establishments will require more cooks to prepare meals for customers.

There is also likely to be a shift away from traditional fast food chains, towards healthier, more green options. Specifically, whole food, plant-based diets are gaining traction as consumers realise the associated health benefits.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
N/A	172	172	86	119

Skill Level
B

3.1.8 NOC 1311 - Accounting Technicians and Bookkeepers

Employment Requirements: Completion of secondary school is required. Completion of a college program in accounting, bookkeeping or a related field or completion of two years (first level) of a recognized professional accounting program (e.g., Chartered Accounting, Certified General Accounting) or courses in accounting or bookkeeping combined with several years of experience as a financial or accounting clerk are required.

Example Titles: Accounting technician, bookkeeper, accounting bookkeeper.

Skills and Knowledge Requirements: Calculate and prepare cheques for payroll; reconcile accounts; post journal entries; maintain general ledgers and financial statements; prepare trial balance of books; calculate fixed assets and depreciation; prepare other statistical, financial and accounting reports; prepare tax returns; keep financial records and establish, maintain and balance various accounts using manual and computerized bookkeeping systems.

6-Digit-CIP Skill Level A (University) Programming:

- 52.0301 - Accounting 52.0801 - Finance, general
-

6-Digit-CIP Skill Level B (College) Programming:

- 52.0301 - Accounting

Trend Analysis: The future of accountancy is promising with a projected 10% increase in accountant and auditor employment between 2016 and 2026, according to the U.S. Bureau of Labor Statistics (BLS). Technology advancements such as minibots, machine learning, and adaptive intelligence are increasingly being added to finance and accounting teams toolkit.

As technology progress and becomes more complex there will be a shift towards further education and upskilling programs to cater for this skill gap.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,053	288	1,341	671	117

Skill Level
A

3.1.9 NOC 4031 - Secondary School Teachers

Employment Requirements: Teachers of academic subjects require a bachelor's degree in education which is often preceded by a bachelor's degree in the arts or sciences. Teachers of vocational or technical subjects require a bachelor's degree in education which is usually preceded by specialized training or experience in the subject. Department heads usually require several years of teaching experience. To specialize in special education or English or French as a second language, additional training is required. A provincial teaching certificate is required.

Example Titles: Librarian, remedial teacher, trades instructor, commerce teacher, adult education teacher, biology teacher, department head, ESL teacher, English teacher, French as a second language teacher, secondary school teacher, special education supply teacher, history teacher, vocational teacher.

Skills and Knowledge Requirements: Assign and correct homework; prepare and deliver presentations at conferences, workshops and symposia; prepare subject material for presentation according to an approved curriculum; teach students through lectures, discussions, audio-visual presentations and laboratory, shop and field studies; evaluate the progress of students and discuss results with students, parents and school officials; develop course content; provide tutoring assistance; participate in staff meetings, educational; conferences and teacher training workshops; prepare, administer and correct tests.

6-Digit-CIP Skill Level A (University) Programming:

- 13.0101 - Education, general; 13.1302 - Art teacher education; 13.1303 - Business teacher education; 13.1305 - English/English language arts teacher education; 13.1311 - Mathematics teacher education; 13.1312 - Music teacher education; 13.1314 - Physical education teaching and coaching; 13.1316 - Science teacher education/general science teacher education
- 13.1318 - Social studies teacher education; 13.1324 - Drama and dance teacher education; 13.1325 - French language/French language arts teacher education; 13.1326 - German language teacher education; 13.1399 - Teacher education and professional development

Trend Analysis: As mentioned in section 4.1.4, secondary school teachers are being forced to integrate virtual learning into the traditional physical teaching model. At the high school level curriculum reform is also likely to occur, with a shift towards more problem based, team learning as opposed to the traditional lecture and route learning model of the 20th century.

Like social workers, high school teacher's role will also become part mental health worker and advocate as they have some of the highest interaction within society with youths.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,014	N/A	1,014	507	98

Skill Level A

3.1.10 NOC 4011 - University Professors and Lecturers

Employment Requirements: A doctoral degree in the field of specialization is required for university professors. A master's degree in the field of specialization is required for university lecturers. Licences or professional certification may be required for professors teaching future practitioners in certain professionally regulated fields, such as medicine, engineering, architecture, psychology, or law.

Example Titles: Department chairperson; assistant professor; associate professor; department head; chairperson, computer science professor; professor of medicine; French language professor; English professor; university professor; lecturer; engineering instructor.

Skills and Knowledge Requirements: Teach one or more university subjects to undergraduate and graduate students; prepare and deliver lectures to students and conduct laboratory sessions or discussion groups; prepare, administer and grade examinations, laboratory assignments and reports; advise students on course and academic matters and career decisions; direct research programs of graduate students and advise on research matters; conduct research in field of specialization and publish findings in scholarly journals or books; may serve on faculty committees, and perform a variety of administrative duties; etc.

6-Digit-CIP Skill Level A (University) Programming:

- 13.0101 - Education, general; 13.1302 - Art teacher education; 13.1303 - Business teacher education; 13.1305 - English/English language arts teacher education; 13.1311 - Mathematics teacher education; 13.1312 - Music teacher education; 13.1314 - Physical education teaching and coaching; 13.1316 - Science teacher education/general science teacher education
- 13.1318 - Social studies teacher education; 13.1324 - Drama and dance teacher education; 13.1325 - French language/French language arts teacher education; 13.1326 - German language teacher education; 13.1399 - Teacher education and professional development

Trend Analysis: As with elementary and high school teachers, the tertiary level education system is set to be disrupted by technology change. COVID-19 impacts on international student numbers and the practicalities of conducting in person classes means that universities are having to quickly adapt to stay relevant and cash flow positive.

Looking forward there will be greater demand for industry experts to deliver online, virtual classes accessible worldwide and increased personalisation across an individual’s learning journey. This will be challenging for existing professors who have traditionally been reluctant to change.

University Program Graduates 2014-2019*	College Program Graduates 2014-2019*	Projected Supply* (2020-2025)	Adjusted Supply* (Based on 50% retention)	Projected Demand 2020-2025
1,014	N/A	1,014	507	90

4. Common Skills Matrix

The figure below presents the overlap of common key skills and knowledge requirements across the occupations identified as highest in demand the A and B skill levels, as presented in Section 3.

Figure 3: Common Skills between Top Projected Occupations Requiring University/College, 2020-2025

Top NOCs	Use Technology	Management of Staff	Purchasing	Report Writing	Marketing	Training/ Teaching	Recruiting /Hiring	Communications	Maintain Equipment	Maintain Financial Records
821 Managers in agriculture	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3012 Registered nurses and registered psychiatric nurses	Yes	Yes	N/A	Yes	N/A	N/A	N/A	Yes	N/A	N/A
621 Retail and wholesale trade managers	Yes	Yes	Yes	Yes	N/A	Yes	Yes	Yes	N/A	N/A
4032 Elementary school and kindergarten teachers	Yes	N/A	N/A	Yes	N/A	Yes	N/A	Yes	N/A	N/A
1221 Administrative officers, 1241 Administrative assistants	Yes	N/A	Yes	Yes	N/A	N/A	N/A	Yes	N/A	Yes
4212 Social and community service workers	Yes	N/A	N/A	Yes	N/A	N/A	N/A	Yes	N/A	N/A
6322 Cooks	Yes	Yes	Yes	N/A	N/A	Yes	Yes	Yes	Yes	N/A
1311 Accounting Technicians and Bookkeepers	Yes	N/A	N/A	Yes	N/A	N/A	N/A	Yes	N/A	Yes
4031 Secondary School Teachers	Yes	N/A	N/A	Yes	N/A	Yes	N/A	Yes	N/A	N/A
4011 University professors and lecturers	Yes	N/A	N/A	Yes	N/A	Yes	N/A	Yes	N/A	N/A

MDB INSIGHT

SOUTHWEST ALBERTA REGIONAL SKILLS STUDY

KEY STAKEHOLDER INTERVIEWS REPORT

Contents

Key Informant Interview Key Findings

A total of 35 key informant interviews were completed with select stakeholders in the region; these included educational representatives, businesses, immigration service providers, local government, and workforce service providers. These interviews were designed to identify skills gaps in the region and better understand how to address workforce challenges.

1.1.1 Emerging Key Themes

Availability of Talent

- Interviewee opinions were diverse when asked about the general availability and quality of talent
- A significant number of interviewees mentioned large numbers of unskilled or lower-skilled workers are currently looking for work in the region and seem to be applying for jobs indiscriminately, creating challenges for the hiring staff of local businesses
- Some firms that require more specialized skillsets identified challenges in finding skilled and experienced professional-level staff in niche industries. Many of these individuals recognized the skill sets they are seeking, are rare in the region, and there is a limited concentration of firms doing similar work. This reduces potential future employment and may impede candidates from relocating to the area. These businesses often cited the importance of internships and co-op training, where they have the opportunity to develop the skills they cannot find in the market.
- One employer is interviewing international candidates from Toronto because graduates from nearby universities were "OK, not great."
- Local entry-level positions do not pay well enough to attract workers from outside the area. Urban centres attract skilled workers willing to drive the distance, creating a brain drain.
- There is lots of work available for people willing to work in 'terrible conditions,' no experience required.

New Generation of Workers

- There are not as many entry-level positions with a broad range of learning opportunities, so young workers or those in transition cannot get foundational work experience skills.
- Stakeholders identified several challenges employers are having with younger workers, leading to higher turnover and training costs.
- Young people want flexible hours, more input and decision-making ability in their work than the previous generations
- Some firms felt young people do not understand the growth opportunities that flow from a minimum wage, entry-level position
- It was noted that career exploration events at school would help young people make more informed career decisions, and HR consultants could help firms better understand the needs of their younger workers
- Employers acknowledged a general lessening of work ethic among job seekers

Wage Competition

Challenges around employers' ability to pay competitive wages were also expressed. Southern Alberta still pays less than other parts of Alberta, which can be difficult for employers when negotiating wages with a talented candidate.

Temporary Foreign Workers (TFW) and Mennonite Workforce

- Low German Mennonites and foreign workers were identified as a source of manual labour, but employers need to be educated on cultural differences. Otherwise, it is difficult to attract workers to the area.
- Some concerns were expressed about a lack of literacy. High school completion rates are low regionally. Many Low German Mennonites live in the area and are not literate in English.
- Employers described the job market as tight, with a lack of qualified individuals.
- Concerns that local training institutions do not offer required programming.

1.1.2 Key Informant Perspective on Job Seeker Challenges

Quality of Employment Opportunities

The key informants interviewed had diverse opinions on the general quality of employment opportunities.

- Many stakeholders referenced the importance of a good match between the employment opportunity and the job seekers' skills and interests.
- For example, new projects are appearing in agriculture that require technical skills for higher-paid roles. However, many mid-level and senior-level professionals' roles, such as human resources management, are not in Lethbridge and are in larger cities such as Calgary.
- Others mentioned a lack of full-time opportunities with individuals working two or three part-time jobs to make ends meet, which empties the pool of qualified candidates.
- Many students and job seekers from other parts of Canada like the area and want to stay, but the length of contracts and hours available is a limiting factor. Eventually, they need to move to a community where employers provide a much more stable income.

Cultural and Wage Mismatch for Youth in Southwest Alberta

- Stakeholders mentioned that youth want to live and work in dynamic and amenity-rich communities to support their personal and professional goals.
- Many feel there is better long-term earning potential in larger cities, and opportunities are limited in Lethbridge, which has a perception of an older rural city.
- It was suggested that organizations need to work with youth to encourage entrepreneurial thinking and help them understand the opportunities that they can create for themselves in these smaller communities.

Gap Between Job Seeker Skills and Employer Expectations

- Stakeholders mentioned that job seekers might find it challenging to find the job they want because they need more experience before obtaining the higher-level role and increased compensation that many young job seekers seek.
- The importance and expectation for job candidates to have soft skills, which are not always prevalent among job seekers, was emphasized.
- Communication skills are particularly crucial for a job seeker so they can communicate their previous experiences and vision for the future both verbally and orally to stand-out from the pool of candidates with the same formal education.
- Key informants felt job seekers are finding it hard to find a job that fits their wage expectancy. It was mentioned that Southwest Alberta's pace of business is slower than larger cities, and job seekers need to slow down the pace at which they want to advance their careers to match the pace of the city. This expectation may be correlated to high wages for relatively low-skilled roles seen in the oil fields relative to the lower wages that require more skills in Lethbridge.
- Key informants also felt jobseekers are challenged to pursue the right education stream for full-time jobs, without going into debt with tuition. Education is costly, and many jobs require specific degrees or certificates that demand individual prerequisites. Jobseekers are concerned the jobs will be gone by the time they complete their training.

Communities are not as welcoming to newcomers

A better job needs to be done on acknowledging cultural differences for newcomers and recognizing education credentials and experience. Accreditation programs tend to be time-consuming and do not help or appear to benefit those already in the trade.

1.1.3 Key Informant Perspectives on Education and Training: Challenges and Opportunities

Challenge - Align Education and Training with Needs of Local Employers

The stakeholders interviewed had diverse opinions in terms of education and local training gaps, depending on their sector.

- The region's many agriculture programs are not offered elsewhere and secure connections to the agriculture community. This alignment between local education/training and the needs of local employers brings young people to the region. Other sectors require local education and training institutions better to align their offerings with the needs of local employers.
- Tech sector course content needs to stay up to date with trends in the sector.
- It was noted that educational institutions could do a better job of promoting and creating awareness of the trades as a viable career option to attract higher-quality applicants to these roles.

Opportunity – Collaboration Between Businesses and Education/Training Institutions

Collaboration between businesses and education/training institutions has increased over time.

- There is more cooperation between high schools and post-secondary to encourage students to consider a variety of different careers.
- Employers mentioned they have continuous opportunities to present to students.
- Local business incubators also act as a link between educational institutions and businesses.
- Co-ops and internships were consistently mentioned as a great way to connect job seekers and employers.

Challenge – Collaboration between industry and education

- Among employers, opinions ranged from wishing educational institutions took business needs more seriously to outright dismissal of the education system – saying business should take care of their training and avoid the educational system.
- Those who work in education and training, believe there are more opportunities for collaboration among various players, specifically businesses and trade associations.
- Post-secondary education institutions could enhance their relationships with local employers by listening to their concerns and addressing them. Lethbridge College's agricultural programs were highlighted as an example for other industries and institutions to consider.
- Some stakeholders reported that post-secondary institutions do not spend enough time promoting their programs at the high school level.
- Business owners also felt students could be introduced to work experiences at a much younger age to develop better expectations for the opportunities in the working world and understanding of the importance of skills and experience to be successful in their careers.

Challenge – Understanding and addressing attitudes of jobseekers and employers

Concerns were expressed about the gap between expectations of both employers and jobseekers, acknowledging that business owners will need to shift their thinking.

- Employers who embrace the realities of attitudes among job seekers, in general, are more apt to retain them for more extended periods.

Opportunity – Enhance work experience programs

The Registered Apprenticeship Program was viewed as a positive program that helps build a connection between youth, educational institutions and employers, providing the all-important on-the-job experience for job seekers and determining if they have a passion for the industry sector or not.

There were negative aspects of the Registered Apprenticeship Program (RAP) (e.g. transportation challenges for apprentices, higher insurance costs for employers), but the benefits outweigh the burden. A similar work experience program could be developed for new Canadians.

Challenge – Who does what

Interviewees felt there were a variety of solutions and opportunities to assist employers and jobseekers but seemed confused about who was responsible. A general lack of leadership, collaboration, and understanding of the next steps were evident.

1.1.4 Specific Gaps Identified through Interviews

Identified Job Gaps

- Lack of entry-level positions
- Millwrights
- Plumbers
- Electricians
- Truck Drivers

Identified Skills Gaps

- Training on technical systems used in agricultural or construction equipment and trucks. Some farmers do not want expensive equipment damaged by an inexperienced worker.
- Digital literacy skills.
- Soft Skills (Communication, Writing)
- Robotics
- LEAN Manufacturing

Southwest Alberta Regional Skills Study Interview Summary – Lethbridge

Employers Point of View on the Local Regional Skills Gap

Availability of Talent

The stakeholders interviewed had a wide diversity of opinions on the general availability and quality of talent. A significant number of interviewees mentioned large numbers of unskilled or lower-skilled workers are currently looking for work in the Region and seem to be applying for jobs indiscriminately, creating challenges for the hiring staff of local businesses. Some firms that require more specialized skillsets identified challenges in finding skilled and experienced professional-level staff in niche industries. Many of these individuals recognized the skill sets they are looking for are rarer in the Region, and there are not concentrations of firms doing similar work, creating fewer opportunities. These businesses often cited the importance of internships and co-op training, where they have the opportunity to develop the skills they cannot find in the market.

New Generation of Workers

Some stakeholders also mentioned challenges related to a gap in understanding between employers and the new generation of workers, which leads to a concern around employee turnover and rising hiring and training costs. For example, millennials are wanting more flexible hours and more input and decision-making ability in their work than the previous generation. Some firms also felt young people don't understand the growth the comes with a minimum wage role or a position where one works with their hands. It was noted that career exploration events at school would help young people make more informed career decisions, and HR consultants could help firms better understand the needs of their younger workers.

Wage Competition

Challenges around employers' ability to pay competitive wages were also expressed. Historically the city felt the impact of the wage war with the oil fields. However, even as this the economy shifts some stakeholders mentioned, Southern Alberta still pays less than other parts of Alberta, which can be difficult for employers when negotiating wages with a talented candidate. On the other hand, one stakeholder feels local economic development does an excellent job of attracting business and employees and universities have contributed to growing technical talent within the community.

Job Seekers Point of View on the Local Regional Skills Gap

Quality of Employment Opportunities

The stakeholders interviewed had diverse opinions on the general quality of employment opportunities. Many stakeholders referenced the importance of a good match between the employment opportunity and the job seekers' skills and interests. For example, new projects are appearing in agriculture that require technical skills for higher-paid roles. On the other hand, many mid-level and senior-level professionals' roles, such as human resources management, are not in Lethbridge and are in larger cities such as Calgary.

Cultural Mismatch Between Youth's Desires and The Image of Lethbridge

Stakeholders mentioned that youth want to live and work in dynamic and amenity-rich communities to support their personal and professional goals. Many youths feel there are more opportunities with long-term earning potential in larger cities, and opportunities are limited in Lethbridge, which has a perception of an older rural city. This was mentioned alongside statements that there are fewer headquarters in Lethbridge relative to larger cities. It was suggested that organizations need to work with youth to encourage entrepreneurial thinking and help them understand the opportunities that they can create for themselves in this smaller community. Lethbridge could also improve its image by promoting rural opportunities, modernizing infrastructure, and strengthening relationships between stakeholders.

Gap Between Job Seeker Skills and Employer Expectations

Stakeholders mentioned that job seekers might find it challenging to find the job they want because they need more experience before obtaining the higher-level role and increased compensation that many young job-seekers desire. Many individuals also stressed the importance and expectation for job candidates to have soft skills, which are not always prevalent among job seekers. Communication skills are particularly crucial for a job seeker so they can communicate their previous experiences and vision for the future both verbally and orally to stand-out from the pool of candidates with the same formal education. Internships and co-ops, as well as committees focused on developing interest and experience in the trades for high school students, are opportunities currently taken advantage of in Lethbridge.

Wage Expectations

Job seekers are finding it hard to find a job that fits their wage expectancy. It was mentioned that Southwest Alberta's pace of business is slower than larger cities, and job seekers need to slow down the pace at which they want to advance their careers to match the pace of the city. This expectation may be correlated to high wages for relatively low-skilled roles seen in the oil fields relative to the lower wages that require more skills in Lethbridge.

Large Influx of Job Applications

A few interviewees mentioned that due to a large number of applicants for most jobs that may or may not be qualified for the role, serious job seekers find it harder to stand out to prospective employers. One employer mentioned they help mitigate this challenge by Inviting candidates to present their resumes personally to their physical workplace. Candidate profiles in Indeed and Monster and from Co-ops and internship programs are also helpful in finding these qualified job seekers.

Education and Training – Challenges and Opportunities

Challenge - Align Education and Training with Needs of Local Employers

The stakeholders interviewed had diverse opinions in terms of education and local training gaps, depending on their sector. Compared to other regions in Southern Alberta, such as Medicine Hat, Lethbridge is an education hub with many agriculture programs not offered elsewhere and secure connections to the agriculture community. This alignment between local education/training and the needs of local employers brings young people to Lethbridge. On the other hand, some sectors require local education and training institutions to better aligning their offerings with the needs of local employers. For example, more focus could be dedicated to expanding training for the trades as millwright plumbers and other trades students currently have to leave the Region for training. Tech sector course content needs to stay up to date with trends in the sector. Gaps were noted in robotics, lean manufacturing, robotics specialization and basic lean training. Stakeholders also expressed the need for educational institutions to teach students' softs skills to support their performance in the working world.

Challenge - Promoting Education in Sectors Requiring More Labour

Stakeholders mentioned that trades had seen fewer candidates interested in pursuing a long-term career, particularly in areas such as electricians and millwrights. It was noted that educational institutions could do a better job of promoting and creating awareness of the trades as a viable career option to attract higher-quality applicants to these roles.

Opportunity – Collaboration Between Businesses and Education/Training Institutions

The stakeholders interviewed mentioned the collaboration between businesses and education/training institutions has increased over time. There is more cooperation between high schools and post-secondary to encourage students to consider a variety of different careers. Employers mentioned they have continuous opportunities to present to students. Local business incubators also act as a link between educational institutions and businesses. Co-ops and internships were consistently mentioned as a great way to connect job seekers and employers. Networking events and job fairs were also mentioned.

Opportunity – Invest in Career Development at a Younger Age

A few stakeholders expressed the importance of youth developing an understanding of the relationship between skills and learning with work opportunities at a younger age. Stakeholders mentioned government funding could be used to incorporate career development starting at Kindergarten. Experiential learning could also be provided at a younger age to develop better expectations for the opportunities in the working world and understanding of the importance of skills and experience to be successful in their career.

Southwest Alberta Regional Skills Study Interview Summary – SouthGrow

Employers Point of View on the Local Regional Skills Gap

Availability of Talent

- The availability of talent is sector-specific.
- Many workers are available for construction. One interviewee said construction is more organized in terms of recruitment, bringing in labour from greater distances if needed, given the sector's temporary nature. Interviewees said construction has kept up with technology.
- Cleaners and health care workers seem to be easy to source. Health care uses a charge-back method to workers have to pay for training if they don't stick with the employer who funded the courses.
- If an employer is looking for specific skills, labour supply can be tighter, as some workers are less willing to venture into the area.
- Local entry-level positions do not pay well enough to attract workers from outside the area. Urban centres attract skilled workers willing to drive the distance, creating a brain drain.

Training levels vary

- Some concerns were expressed about a lack of literacy. High school completion rates are low regionally. Many Low German Mennonites live in the area and are not literate in English.
- There is not as much entry-level work with a broad range of learning opportunities, so young workers or those in transition cannot get foundational work experience skills.
- Workers not learning specialized systems used on agricultural or construction equipment and trucks. Some farmers do not want expensive equipment damaged by an inexperienced worker. There were concerns expressed about a drop in digital literacy skills. Without those skills, one interviewee said, it's like being illiterate.

A disconnect between outside companies and local workers

One interviewee noted a disconnect between companies based in urban centres looking for workers locally, and not receiving the support they need, and not being able to identify local workers with the skill sets. As a result, there has been some local public opposition to the projects. Businesses complain that commuter workers are not spending any money in the community other than lunch. Buy-local marketing campaigns have been attempted, but often shops and businesses are not open when residents want to purchase items.

Differing appetites for 'hard work.'

- There is lots of work available for people willing to work in 'terrible conditions,' no experience required.

- However, younger workers are not interested in manual-labour positions due to the nature of the work or the pay level. Younger workers don't possess the resilient work ethic that older workers do.
- Some workers have become accustomed to high rates of pay and would instead perform a service job that manual labour if the income is similar. Workers are also not willing to put in extra time, arrive early or stay late.
- Low German Mennonites and foreign workers were identified as a source of manual labour, but employers need to be educated on cultural differences. Otherwise, it is difficult to attract workers to the area.

Job Seekers Point of View on the Local Regional Skills Gap

It's not what you know

Getting a job in the area depends on who you know. As a result, experienced newcomers and highly qualified individuals without local connections are working low-skills jobs. Affluent individuals are scooping higher pays even though they are not as skilled because they know someone.

Wages are low

Even in harsh work conditions, wage rates offered are low, resulting in less disposable income, multiple part-time jobs, and mental health issues. Workers are drawn to urban areas that pay better, resulting in a shrinking labour pool.

Communities are not welcoming

A better job needs to be done on acknowledging cultural differences for newcomers. Small towns are not as welcoming as they could be. Slow accreditation programs do not help and appear to benefit those already in the trade. The example of the qualified foreign dentist cleaning horse stalls highlights the perception that newcomers should be diminished and discounted before they are accepted in a community, a situation that needs to change.

Employers need to understand youth perspective

Employers are not creating jobs with growth potential; they are not willing to confront the demands of a younger workforce want flexible work hours and little manual work. Some youth don't want to be saddled with a mortgage and the expense of owning a vehicle. As a result, local youth head to better-paying urban centres with more opportunities and suitable quality of life and don't return.

Education and Training – Challenges and Opportunities

Challenge – Build a bridge between business and education

Those who work in the education and training realm, believed there are more opportunities for collaboration among various players, specifically businesses and trade associations. Among employers, opinions ranged from wishing educational institutions took business needs more seriously to outright dismissal of the education system – saying business should take care of their training and avoid the educational system. The answer is likely somewhere in the middle, but a stronger bridge needs to be built among the various players facing the challenges. Besides, there could be more productive relations between levels of education, with one public education stakeholder complaining that post-secondary institutions do not spend enough time promoting their programs at the high school level. Business owners also felt students could be introduced to work experiences at a much younger age, but the system is not set up for this.

Challenge – Understanding and addressing attitudes of jobseekers and employers

Concerns were expressed about the gap between expectations of both employers and job seekers, with a grudging admission that business owners will need to shift their thinking more than those in the job market. Employers who embrace the realities of attitudes among job seekers, in general, are more apt to retain them for more extended periods. What motivated an employer to take a job when he or she was younger (stable job, income, settling down) might not be attractive to workers in today's society (seeking professional stimulation, advancement, gym pass, flex time). The good news is young newcomers from other countries, or other parts of Canada may share the mindset of employers – seeking stability, but willing to work hard. Again, employers will need to shift gears on how they attract and retain newcomers.

Opportunity – Enhance work experience programs

The Registered Apprenticeship Program was viewed as a positive program that helps build a connection between youth, educational institutions and employers, providing an all-important on-the-job experience for a job seeker and determining if they have a passion for the industry sector or not. There were negative aspects of RAP (e.g. transportation challenges for apprentices, higher insurance costs for employers), but the benefits outweigh the burden. A similar work experience program could be developed for new Canadians.

Opportunity – Employer input into training and employee recruitment

Post-secondary education institutions could enhance their relationships with local employers by listening to their concerns and addressing them. Lethbridge College's agricultural programs were highlighted as an excellent example for other industries and institutions to consider. Some worker recruitment and retention initiatives were praised, such as job fairs and competitions. Still, all could benefit from better communication between business, education, workforce agencies, economic development offices and other stakeholders.

Southwest Alberta Regional Skills Study Interview Summary – Southwest

Employers Point of View on the Local Regional Skills Gap

Economy in transition has a ripple effect

The loss of manufacturing jobs and the downturn in traditional oil and gas has been detrimental to associated service sectors, such as agri-food, IT, and others. As a result, jobs in some industries have moved out of province, so luring highly qualified employees back from further afield is very difficult.

Difficulty finding workers

Employers described the job market as tight, with a lack of qualified individuals to draw from. One established small business felt comfortable with the workers on staff but expressed concern that he had no training institution to assist him. A health care employer expressed concern about burn-out among existing workers, due to the economies of scale of expanding services in a small community. One employer is interviewing international candidates and from Toronto, because graduates from nearby universities were "OK, not great."

Work ethic and training quality

Employers acknowledged a general lessening of work ethic among job seekers, although expressing concern that their employers are abusing some young people while other young people "act like King Tut." Another employer voiced concern about the quality of education and training students were receiving. There is more demand for jobseekers to have a degree or diploma, but even if they do have the papers, they are not necessarily ready to work. One employer expressed concern that a worker could do an excellent job if they are balancing two or three responsibilities simultaneously.

Job Seekers Point of View on the Local Regional Skills Gap

Lack of full-time opportunities

People are working two or three part-time jobs to make ends meet, which empties the pool of qualified candidates.

Cost of training

Jobseekers are challenged to pursue the right education stream for full-time jobs, without going into debt with tuition. Education is costly, and many jobs require specific degrees or certificates that demand individual prerequisites. Jobseekers are concerned the jobs will be gone by the time they complete their training.

Quality of life is good, but

Many students and job seekers from other parts of Canada like the area and want to stay, but the length of contracts and hours available is a limiting factor. Eventually, they need to move to a community where employers provide a much more stable income. Then they can consider buying a house or taking a loan, something they cannot do on part-time hours.

Education and Training – Challenges and Opportunities

Challenge – Education institutions disconnected from businesses

Employers felt the education system is failing employers and job seekers in terms of a lack of career fairs, job placements, field trips to universities and colleges, and generally enhancing communication between those who train and those who employ. Some felt criteria and guidelines for programs developed by the education system do not meet the needs of employers.

Challenge – Who does what

Interviewees felt there were a variety of solutions and opportunities to assist employers and jobseekers but seemed confused about who was responsible. A general lack of leadership, collaboration, and understanding of the next steps were evident.

Opportunity – On the job experience

Stakeholders felt the focus should be placed on trying to get new graduates as much as experience and opportunity as possible. Students should be provided on-the-job experience while they are still in school. Employers should be asked to provide input into these programs, so they see the graduate as employable when they are being considered for a job.

Opportunity – Incentives for employers to hire full-time

Interviewees encouraged the government to find ways for employers to provide full-time jobs for job seekers, as opposed to casual workers. Also, providing incentives and highlighting the benefits of living and working in rural Alberta could help draw more jobseekers.

SOUTHWEST ALBERTA REGIONAL SKILLS STUDY

PHASE 1 SURVEY ANALYSIS REPORT

Contents

Key Themes from the Surveys

Two quantitative survey instruments were used in the Southwest Alberta Regional Skills Gap Study to provide evidence of potential skills gaps in the workforce and also to identify potential pathways towards their resolution. The job seeker survey was an online open web link sent to individuals in the Southwest Alberta Region who were in search of employment. The local employer survey was conducted via telephone targeting the businesses and organizations in the region. The detailed methodology and survey results are described in the next two sections. Here are some key themes that were identified for the Skills Gap Study from these surveys:

Worker training – The local employers survey identified that many local organizations find worker training was a challenge for their business. Out of 160 businesses who had reported experiencing challenges recruiting or retaining talent for specific occupations, 93% listed the availability of qualified candidates as either somewhat of a challenge or a significant challenge. On the job seekers' side, 71% rated the opportunities to enhance their skillsets in the region as poor or fair. This discrepancy highlights a potential source of friction in the labour force since businesses report a need for skills and qualifications that the potential workers feel they don't have enough opportunities to obtain.

Evidence of a skills gap – Among the local job seekers surveyed, 85% listed a lack of suitable job opportunities as somewhat of a factor or a significant factor hindering them from getting a job. Among the employers surveyed, 51% noted that they were somewhat or very dissatisfied with the availability of a trained, local workforce. This mismatch provides further evidence of a skills gap since both the demand and supply side of the workforce equation expresses a lack of options instead of just one side.

Soft skills – In many regions across North America, employers are increasingly reporting that job applicants lack soft skills compared to previous decades. In the Southwest Alberta Region, the rating of soft skills among local workers was moderately high from both employers and job seekers. Approximately 60% of local employers said that they were very or somewhat satisfied with the availability of workers with the necessary soft skills. Similarly, only 21% of job seekers mentioned skills training as a possible way to achieve their full employment potential. However, it is work noting that the availability of soft skills in workers was highly correlated with businesses' overall satisfaction with the Southwest Alberta Region as a place to do business, which placed this factor as a high priority to address. This finding signifies that workers' soft skills are highly valuable to businesses in the area, so any potential to enhance soft skills among workers in the area should be considered worthwhile.

Culture/immigration – The successful integration of a culturally diverse workforce can be a significant strength for a region. Similarly, immigrant talent can be an essential source of labour to fill gaps that might exist in the local workforce. In the Southwest Alberta Region, 62% of the employers who answered the questions about immigrant labour on the questionnaire listed language or ESL barriers as a factor that might impede them from hiring a position beyond entry-level. Further, 61% of the local employer respondents mentioned language and cultural training as support that would significantly increase their likelihood of hiring more immigrants.

Worker priorities – There was a perception among the job seekers surveyed that there is a lack of adequately paying jobs in the area, with 67% of job seekers rating this as poor or fair in the region. Further, 88% of the job seeker respondents listed wage rates and benefits as the attribute that they assign the most value to when making decisions about the jobs they pursue, and this was the most chosen factor. Wages aside, there were some other factors that job seekers valued in the jobs they pursued. When choosing their top 3 attributes that they assign the most value to, 79% chose interesting/fulfilling work, 68% chose job security, and 63% chose work-life balance. These statistics suggest that local employers may be able to significantly improve their recruitment of talent through other means than wages and benefits.

Professional Development – Investments in professional development opportunities could be an opportunity for recruitment and retention improvement in the Southwest Alberta Region. Among job seekers, 54% rated training/advancement opportunities as a top 3 attribute that they assign the value to when making decisions about jobs to pursue. On the employer's side, 31% reported spending less than $250 per employee on professional development activities. The amount spent on training varied greatly by employer, with 14% stating that they spend more than $3000 per year per employee.

In addition to these key themes that were identified in the two surveys, many other survey-specific insights were drawn from the analyses. The following two sections show the results from the questions ask on both questionnaires and dive deeper into the results from these surveys.

Southwest Alberta Local Employer Workforce Survey – Detailed Analysis

Summary of Key Findings

As a part of this Regional Skills Study, we surveyed Local Employers where representatives answered questions about their business' experiences with workforce recruitment and retention. The survey was conducted over the phone via Computer-Assisted-Telephone-Interviewing. This methodology yielded 309 responses from businesses in Southwest Alberta, with a margin of error of +/- 5.6% using a 95% confidence level.

As a part of the questionnaire, respondents were asked to rate various factors about operating a business in Southwest Alberta and critical factors that may be hindering them from attracting a diverse talent pool. Some key points that the responses identified were:

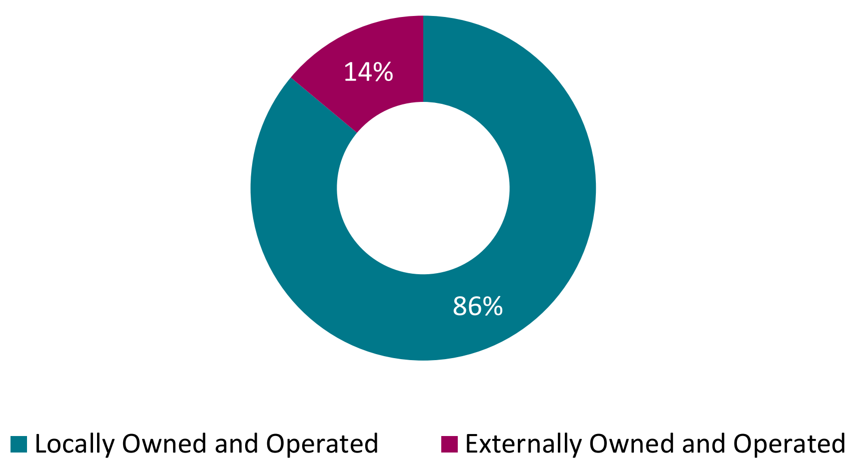
- **Businesses Satisfaction Level:** The majority of businesses surveyed were 'very satisfied' (48%) or 'somewhat satisfied' (43%) with operating a business in the Southwest Alberta region. In an additional question that ranked satisfaction levels for different factors, businesses indicated they were most satisfied with professional development opportunities for staff (26%) and the availability of workers with appropriate levels of education. Conversely, businesses showed lower levels of satisfaction with government and non-profit/community support activities (18%) and the availability of experienced workers in the region.
- **Businesses view challenges with talent attraction and retention:** The results were divided, with 48% of respondents indicating they had experienced a challenge during recruitment or retaining of talent and 52% that they had not.
- **Critical challenges in attracting a retaining talent:** According to survey responses, the most significant challenge was the 'availability of qualified candidates,' with 44% of respondents indicating this to be a significant challenge or somewhat of a challenge (49%). Other significant challenges included 'drugs & alcohol issues' (12%) and the 'availability of childcare' (12%). The perception of 'liveability in communities' was also identified by respondents as being a challenge.
- **Hiring intentions over the coming year:** Over half of the business respondents (52%) indicated that they were planning to hire a new employee within 12 months[1].

[1] Note that the data were gathered prior to the COVID-19 pandemic.

Local Employer Workforce Survey – Detailed Analysis

Among the businesses surveyed (see Figure 1), 86% were locally owned and operated, and 14% of businesses were externally owned and operated.

Figure 1: Which of the following best describes your organization?



As can be seen in Figure 2, Lethbridge had the highest concentration of organizations surveyed at 54%, followed by Taber at 16% and Cardston at 9%. The high proportion of Lethbridge respondents is likely due to the city's population compared to the rest of the region, ranking 4th in Alberta with 96,000 people[2]. Notable communities included in the 'other' category include Picture Butte, Fort Macleod, Vauxhall and Claresholm.

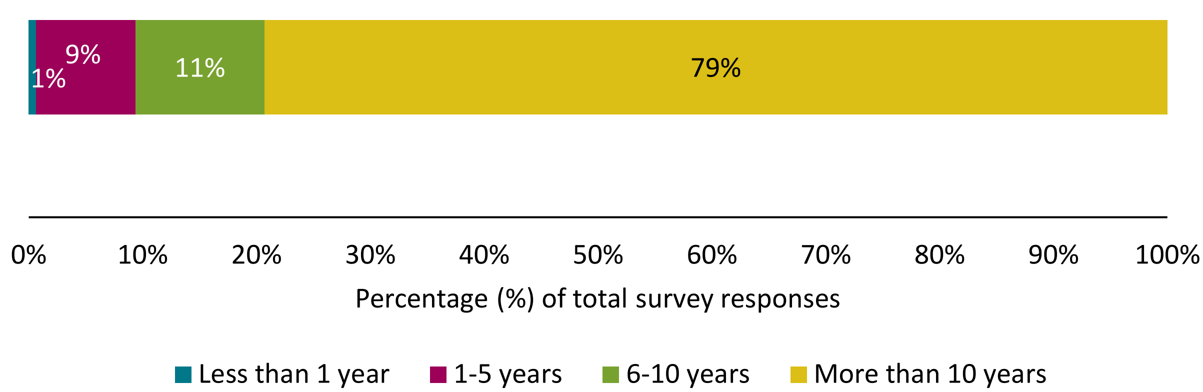
Figure 2: In what communities is your organization located?

Mention	Number	Percentage
Lethbridge	167	54%
Taber	50	16%
Cardston	27	9%
Vulcan County	25	8%
Willow Creek	13	4%
Pincher Creek	10	3%
Ranchland	1	0.32%
Other	94	30%

[2] Canadian Census 2016, City of Lethbridge Population

Among the 309 businesses surveyed (see Figure 3), there was a high concentration of established organizations, with 79% residing for more than ten years. Conversely, less than 1% of surveyed businesses indicated they had been in operation for less than a year.

Figure 3: How many years has your organization operated in the region?



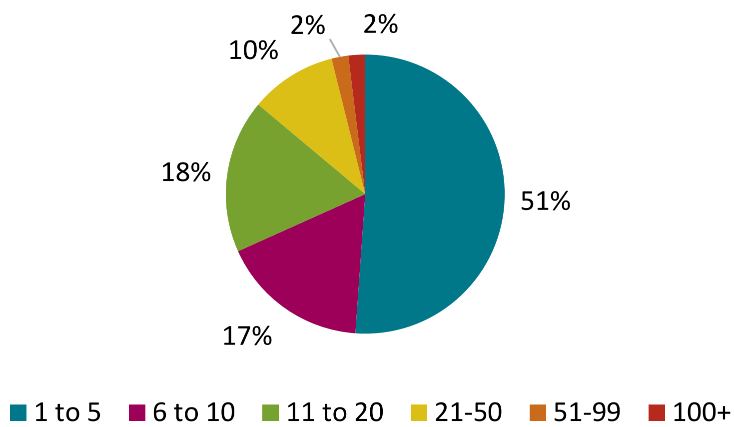
All survey respondents were asked to describe their organization's primary activities (see Figure 4). The highest proportion of activities included agriculture (19%), followed by manufacturing and transportation at 8%. The majority of businesses (57%) indicated that their primary industry was in an 'other' category than those listed. Common industries identified within this 'other' category included construction-based businesses, retail stores, and financial institutions.

Figure 4: Which of the following industries best describes your organization's primary activities?

Primary Activity	Percent
Agriculture	19%
Manufacturing (General)	8%
Transportation	8%
Healthcare and Social Assistance	5%
Tourism	1%
Manufacturing (Value-added food processing)	1%
Logistics and Warehousing	1%
Other	57%

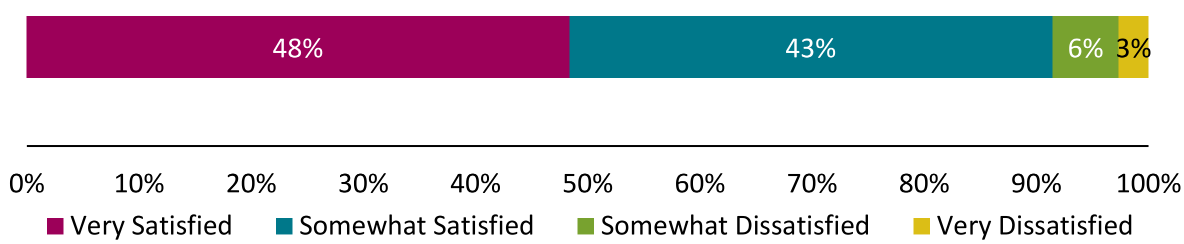
Figure 5 demonstrates the number of full-time employees within the 309 surveyed businesses. As can be seen in the data, the majority of businesses are small, with 51% (158 businesses) employing between 1 to 5 people and 17% (53 businesses) employing between 6 and 10. From a medium to large business perspective, there was a lower concentration, with only 4% of businesses employing 51 or more people.

Figure 5: Including yourself, how many full-time employees (30 hours or more) do you employ whose primary place of work is in the Southwest Alberta region?



As can be seen in Figure 6, the majority of businesses surveyed are either 'very satisfied' (48%) or 'somewhat satisfied' (43%) with operating a business in the Southwest Alberta region. Only a small percentage (6%) of respondents indicated they were 'somewhat dissatisfied' and an even smaller percentage (3%) that they were 'very dissatisfied.'

Figure 6: Overall, how satisfied are you with operating a business in the Southwest Alberta region?



Respondents were also asked to identify if they had experienced recruiting or talent retention challenges in the past year (see Figure 7). The results were split, with 48% indicating they had experienced a challenge during recruitment or retaining of talent and 52% that they had not. This may indicate a greater need for attraction and retention support services in the region.

Figure 7: Has your business experienced any past or present challenges in recruiting or retaining talent for specific occupations?

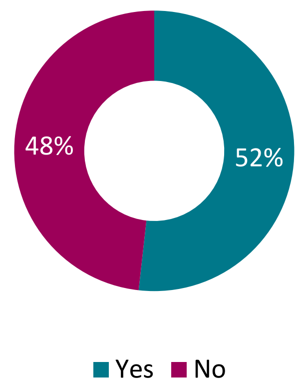
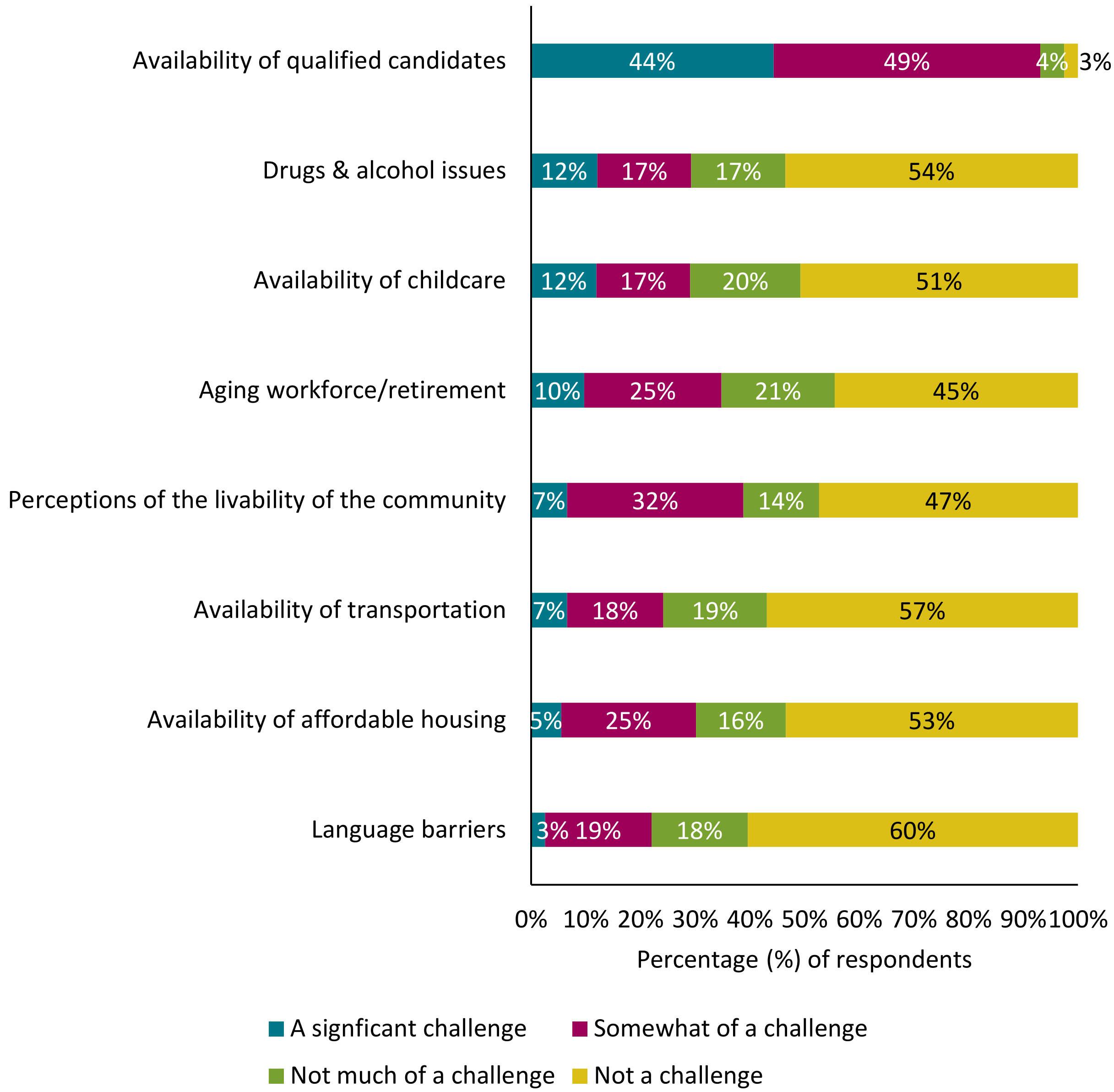


Figure 8 outlines the key recruiting, hiring, and retention challenges that business owners face in Southwest Alberta. According to survey responses, the most significant challenge is the 'availability of qualified candidates,' with 44% of respondents indicating it to be a significant challenge or somewhat of a challenge (49%). Other significant challenges included 'drugs & alcohol issues' (12%) and the 'availability of childcare' (12%). The perception of 'liveability in communities' was also identified by respondents as being a challenge in attracting talent, 7% indicating it to be a 'significant challenge,' and 32% 'somewhat of a challenge.' Factors of low relative importance in attracting and retaining talent included 'language barriers,' 'affordable housing,' and the 'availability of transportation.'

Figure 8: To what extent are each of the following a challenge when recruiting, hiring and retaining employees in your organization?



Respondents were also asked to indicate their hiring plans for the upcoming year. Out of the 309 businesses, just over half at 52% (162 businesses) indicated that they were planning to hire a new employee within 12 months and 48% (147 businesses) that they did not intend to hire.

Figure 9: Are you planning to hire new employees in the next 12 months?

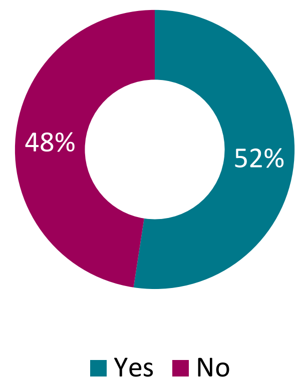
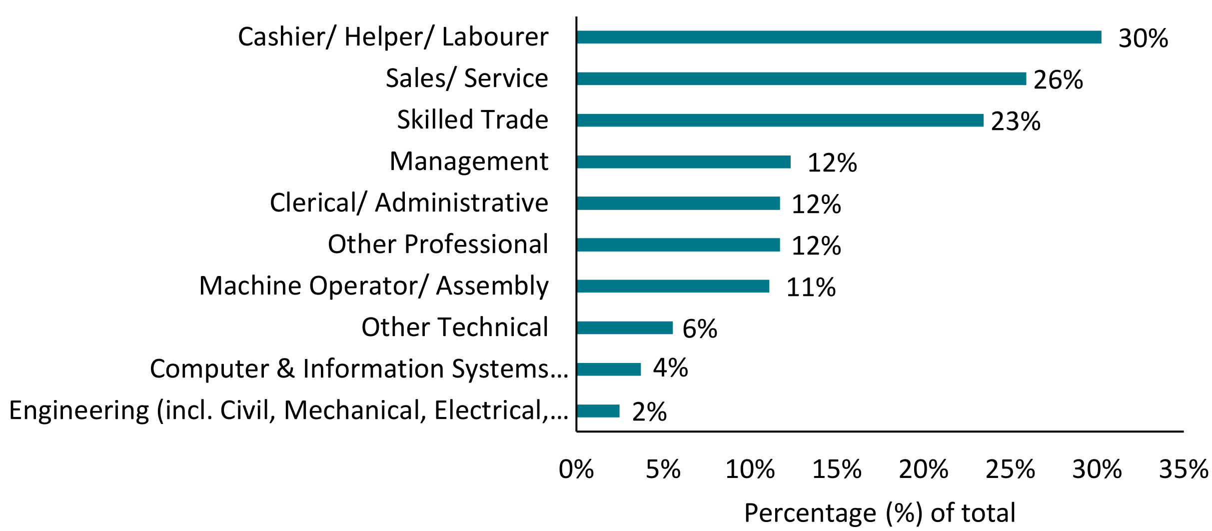


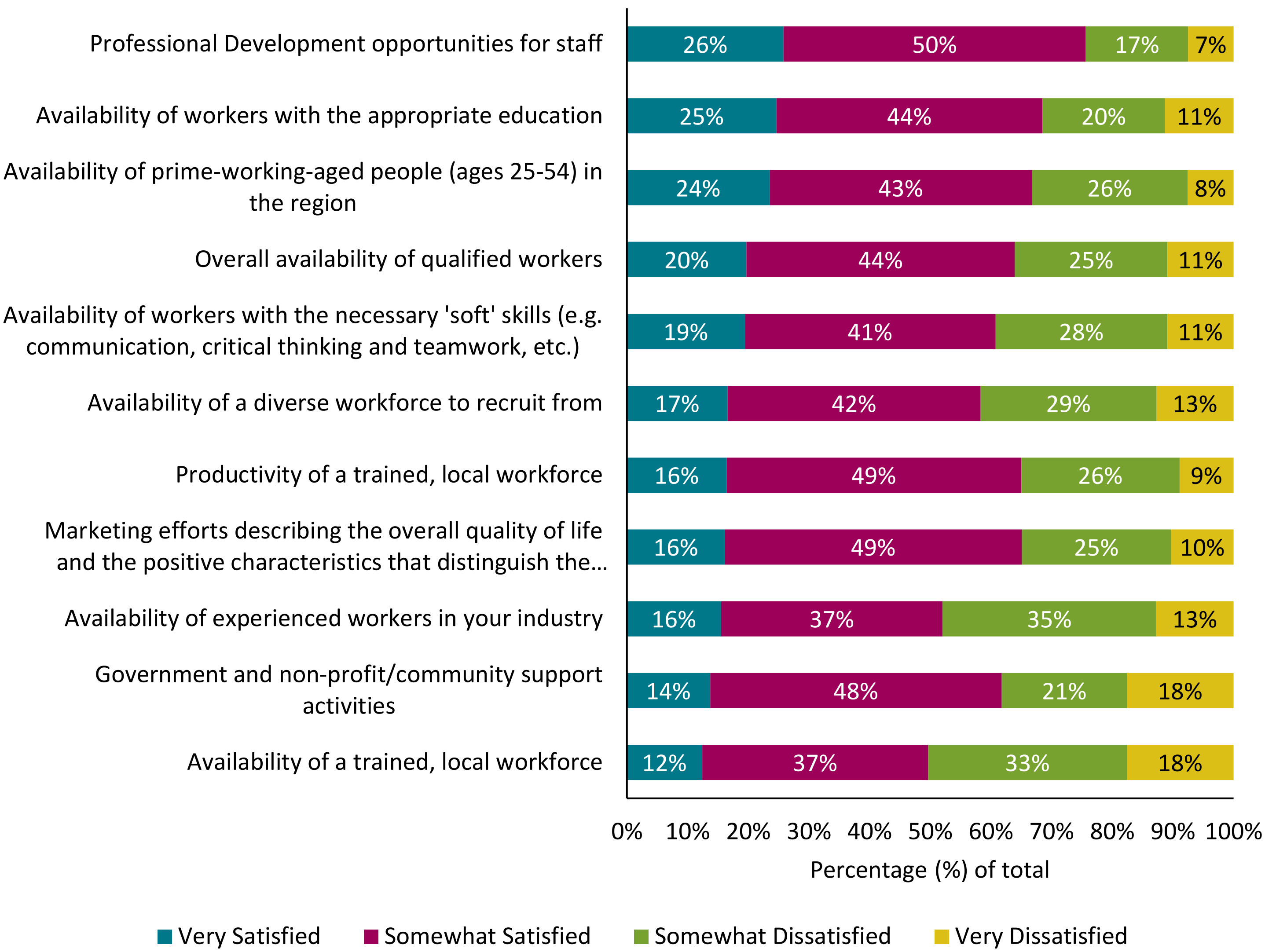
Figure 10 shows out of the 162 businesses likely to hire a new employee, which occupations or positions were most likely to be hired within a 12-month window. Based on the responses, it can be seen that unskilled labour is most in demand across the following year, with 'cashier, helper and labourers' ranked as the second-highest response at 30%, followed by sales and service at 26%. Higher skilled positions such as engineering and computer and information system professionals were less likely to be hired, with both categories recording less than 4%. Approximately a third of respondents (34%) indicated they would require 'other' occupations and positions in the upcoming year. Of these responses, notable themes included requiring drivers (including truck drivers), general labourers, veterinarians, and other trades (e.g. electricians).

Figure 10: Which occupations/positions do you expect you will most likely require?



As can be seen in Figure 11, respondents were most satisfied with professional development opportunities for staff, with 26% stating they were 'very satisfied' and 50% 'somewhat satisfied.' The availability of workers with the appropriate education and the availability of prime-working-aged people (age 25 – 54) in the region were the next two categories that respondents were most likely to be either 'very satisfied' or 'somewhat satisfied.' Conversely, the factors that respondents were most dissatisfied with included the availability of experienced workers in their industry (35%) and the availability of a trained local workforce (33%). Just over a quarter (28%) of respondents were 'very dissatisfied' with the availability of workers with the necessary soft skills and (11%) were 'somewhat dissatisfied.'

Figure 11: For each of the following statements, please tell me your level of satisfaction



Using local employers' levels of satisfaction on the various workforce attributes of the Southwest Alberta Region, we developed a priority matrix for the area (Figure 12). Using MDB Insight's unique methodology, we calculate the level to which each of the workforce factors is associated with changes in businesses' overall level of satisfaction operating a business in the area (shown in Figure 6). Together with the levels of performance on each factor (the percent of respondents rating the factor as 'very satisfied' or 'somewhat satisfied'), we calculate our priority ranking for the various workforce factors.

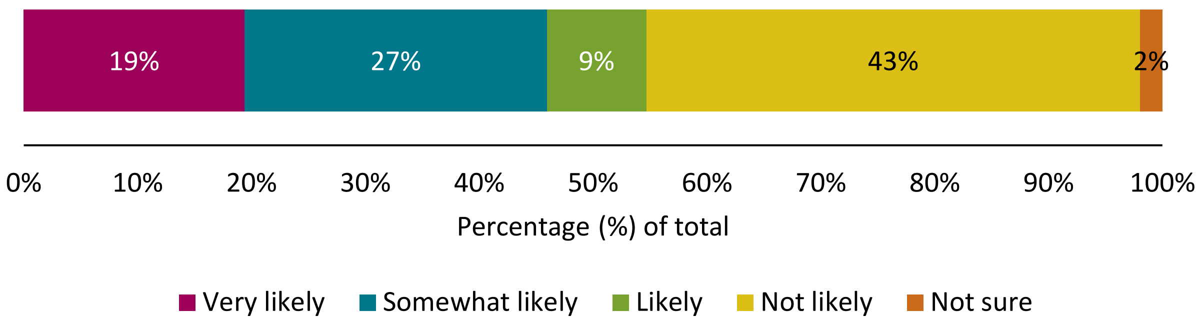
In the Southwest Alberta Region, the top three priorities were: the availability of a trained, local workforce, the availability of experienced workers in your industry, and the availability of a diverse workforce. These factors showed high levels of importance to overall satisfaction and low levels of performance. The relatively lower priorities in the region were: the professional development opportunities for staff, availability of workers with the appropriate education, and the availability of prime-working-aged people (ages 25-54) in the region. Priority rankings can be helpful to take into consideration, alongside the associated costs/challenges associated with taking action on certain workforce factors, to determine the most efficient ways to support businesses through workforce development in the region.

Figure 12: Workforce priority matrix

Workforce Factor	Level of Importance	Performance	Priority Rank
Availability of a trained, local workforce	7.9	50%	1
Availability of experienced workers in your industry	8.0	52%	2
Availability of a diverse workforce to recruit from	8.7	58%	3
Availability of workers with the necessary 'soft' skills (e.g. communication, critical thinking and teamwork, etc.)	7.9	61%	4
Marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace	8.5	65%	5
Overall availability of qualified workers	8.1	64%	6
Government and non-profit/community support activities	7.6	62%	7
Productivity of a trained, local workforce	7.7	65%	8
Availability of prime-working-aged people (ages 25-54) in the region	8.1	67%	9
Availability of workers with the appropriate education	7.6	68%	10
Professional development opportunities for staff	8.4	76%	11

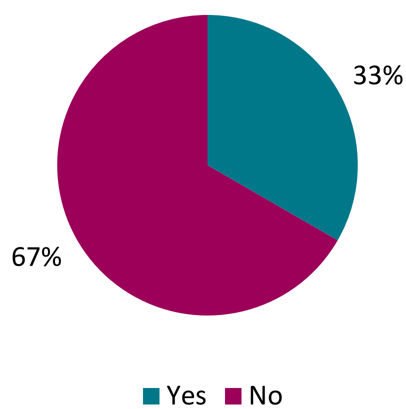
Respondents were also asked to indicate how likely difficulties with skilled labour retention or recruitment would impact their long term decision to stay in the Southwest Alberta region (see Figure 13). Nearly a fifth (19%) of responses indicated the factor to be 'very likely' and just over a quarter (27%) that is was 'somewhat likely.' Conversely, 43% of respondents indicated that labour retention or recruitment is 'not likely' to affect their decision to stay in the region.

Figure 13: How likely are difficulties with skilled labour retention or recruitment to influence your decision to remain operating your organization in the Southwest Alberta region?



As can be seen in Figure 14, among the 309 businesses in the survey, over half (67%) indicated that they recruit labour from outside of the Southwest Alberta region. This could indicate a lack of local skilled and unskilled talent in the region.

Figure 14: Does your organization recruit labour from outside the region to fill local positions?



The 103 businesses that responded that they recruit talent from outside of Southwest Alberta were also asked about where they recruit from (Figure 15). The three most often cited answers were 'Outside the region but inside Alberta' (80%), 'Outside Alberta, BC and Saskatchewan but inside Canada' (37%) and BC or Saskatchewan (36%). Only 21% of businesses mentioned recruiting from outside Canada, with the US being the primary recruitment destination.

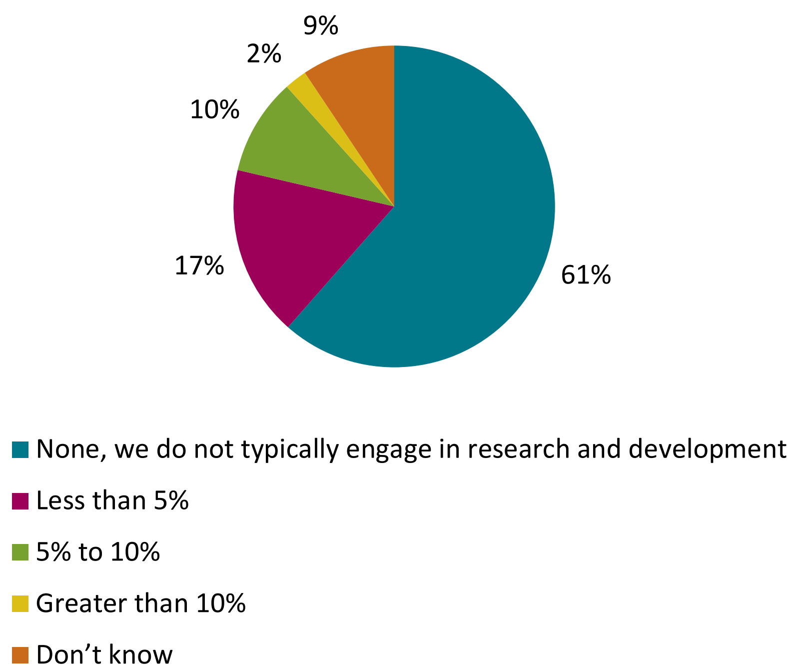
Figure 15: Where do you recruit from most often?

Mention	Percentage
Outside the region but inside Alberta	80%
Outside Alberta, BC and Saskatchewan but inside Canada	37%
BC or Saskatchewan	36%

Mention	Percentage
Outside Canada	21%

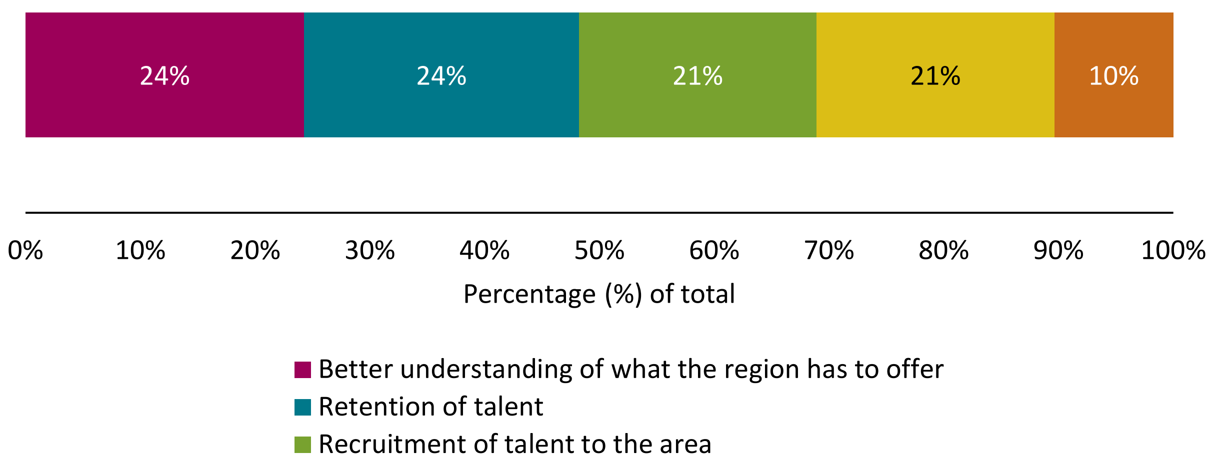
Out of the 309 businesses surveyed, the majority (61%) did not typically engage in research and development (R&D) activities. Among those that do engage in R&D activities, 17% (53 businesses) indicated they spend less than 5% of their revenue, and 10% (30 businesses) spend between 5 to 10 percent. Only 2% (7 businesses) indicated that they spend more than 10% of revenue on R&D activities.

Figure 16: If your organization is engaged in research and development, what percentage of your revenue do you typically spend on this activity?



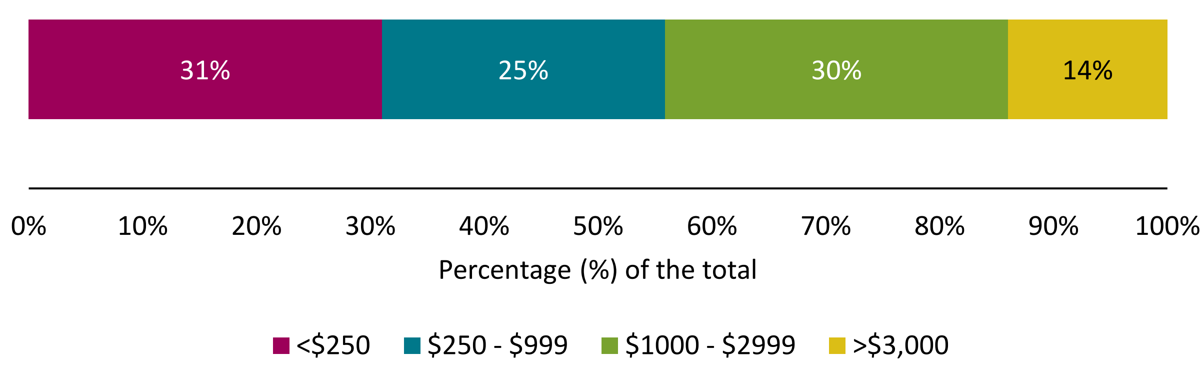
Respondents were also asked to indicate which labour force issue was the most important and should be addressed in this strategy (see Figure 17). The top two ranked issues that should be addressed were 'better understanding of what the region has to offer' and 'retention of talent,' which both received 24% of responses. 'Recruitment of talent to the area' (21%) was another key priority.

Figure 17: What is the most important labour force issue that must be addressed through this strategy?



During the survey, respondents were also asked how much they spend per employee on professional development activities (see Figure 18). Out of the 229 businesses that knew their professional development spending, a majority (31%) indicated that they spend less than $250. A further quarter spent between $250-$999, and only a small percentage (14%) spent more than $3,000. Interestingly, out of the 309 businesses surveyed, 80 respondents indicated that they did not know their professional development spend.

Figure 18: In a typical year, on average, how much per employee do you spend on professional development activities?



37% of all 309 businesses indicated that they expect the amount they spend on professional development to increase over the next five years, and 46% expect it to remain the same (see Figure 19). Only 3% of respondents expected this amount of decrease, and 14% were unsure.

Figure 19: Over the next five years, do you expect this amount to increase, decrease or stay the same?

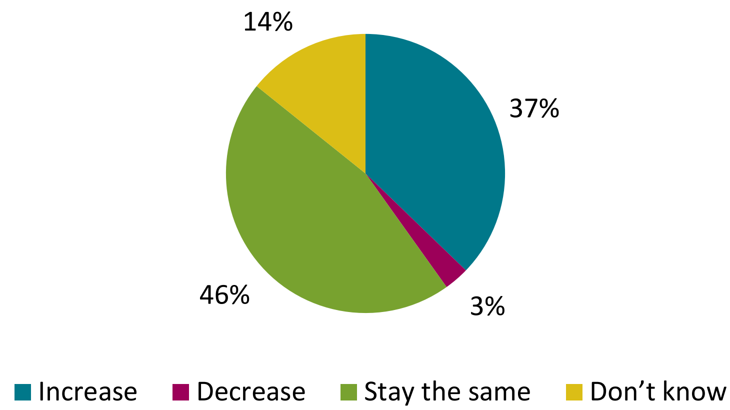
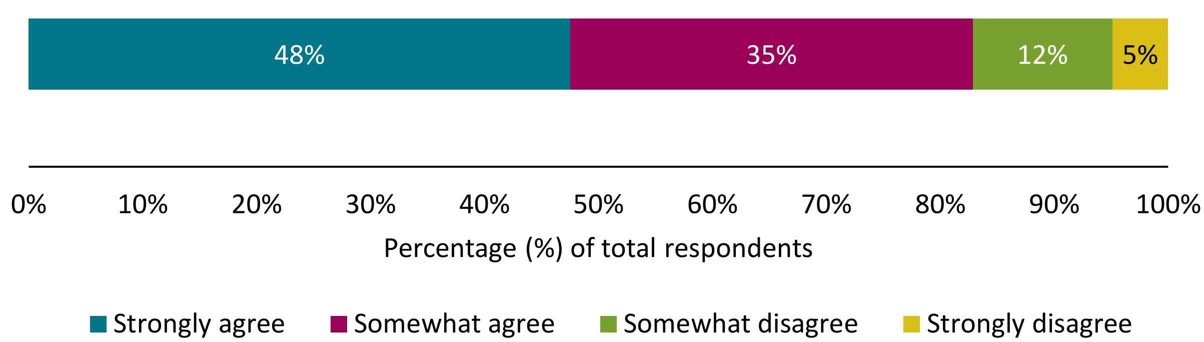


Figure 20 aims to understand the level of support the businesses have for employees seeking professional development opportunities. Based on the results from the survey, nearly half (48%) of respondents' strongly agree' that they are encouraging of employees seeking professional development and over a third (35%) that they 'somewhat agree.' Only 12% of firms indicated that they 'somewhat disagreed' with the statement and 5% 'strongly disagree.'

Figure 20: To what extent do you agree or disagree with the following statement: When my employees seek training to learn new skills, my organization encourages them to seek accredited training, even if it costs more.



Respondents in the survey were also asked if they would be willing to answer additional questions relating to the hiring of immigrant workers. The following three questions are based on responses from the 95 businesses, which indicated that they were willing to participate.

Respondents were asked to indicate the barriers that might impede them from hiring immigrant workers for higher-level positions beyond entry-level (see Figure 21). Language or English as a Second Language (ESL) was the top-ranked barrier at 62% of total respondents. Concern over the qualifications of immigrant workers was another critical issue (45% of respondents), as was the quality of their resumes (20%). Twenty respondents also indicated 'other issues' that impede hiring immigrant workers, such as the lack of relevant insurance, the high financial and time cost associated with doing a labour market impact assessment and a lack of understanding of the visa and regulatory requirements.

Figure 21: What barriers, if any, do you feel might impede you from hiring immigrant workers for higher-level positions that are beyond entry-level?

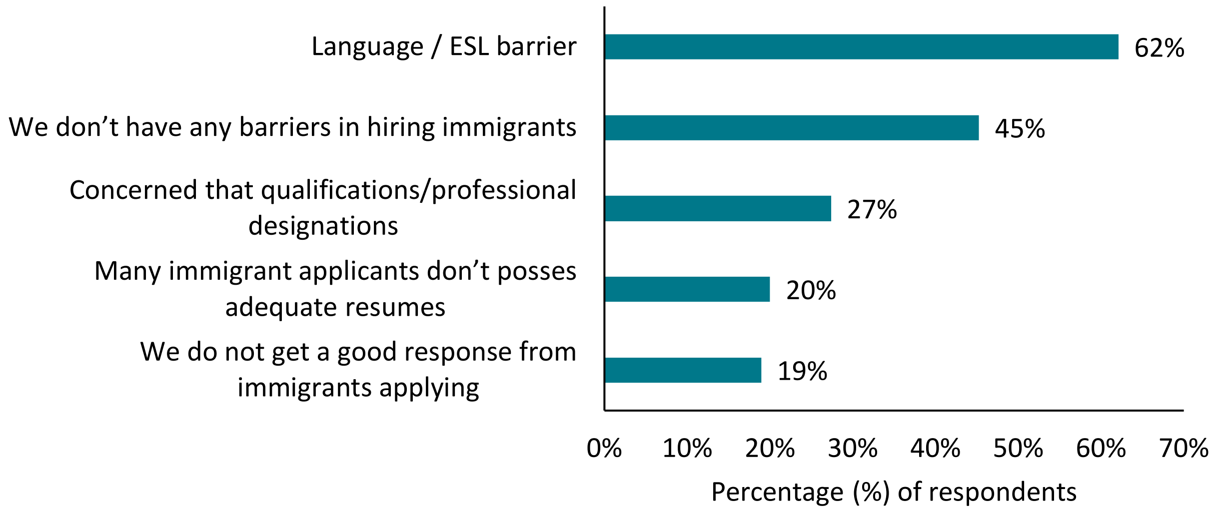
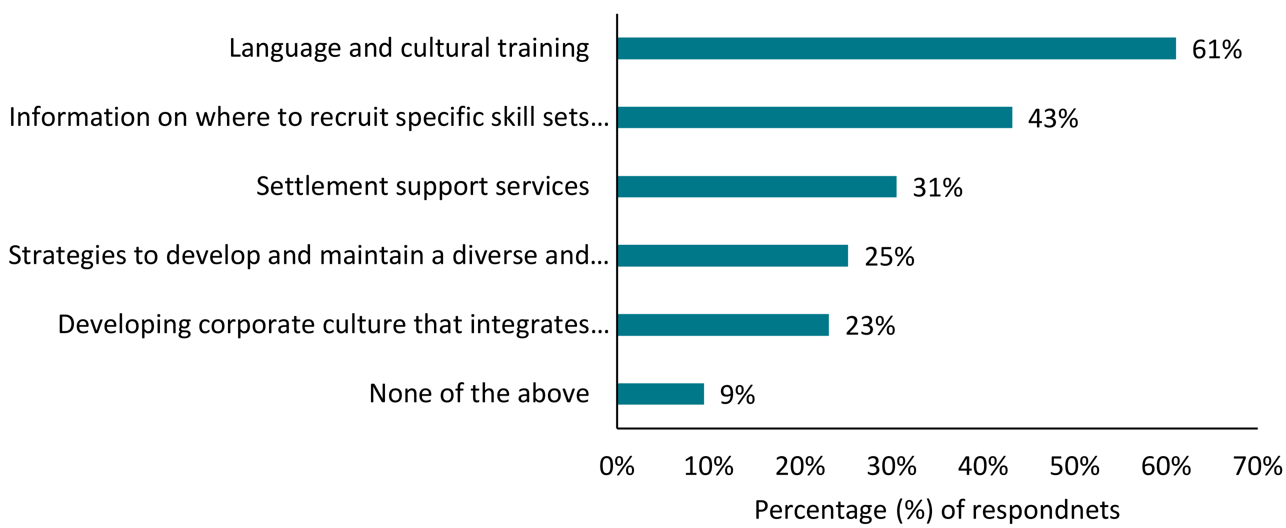


Figure 22 details the types of information and supports that businesses require to increase their likelihood of hiring immigrant workers. As can be seen from the responses, 'language and culture training' is the most critical at 61%, followed by 'information on where to recruit specific skill sets' at 43%. Other important support services identified included 'strategies to develop and maintain a diverse and inclusive workplace' at 40% and 'settlement support services' at 31%. Only 23% of respondents identified 'developing a corporate culture that integrates immigrants' as being important.

Figure 22: Please indicate which of the following types of information and support would significantly increase your likelihood of hiring more immigrants?



Respondents were also asked to indicate their preferred methods to obtain support and information (Figure 23). 'Sharing of best practices' was the top-ranked response at 81%, followed by 'workshops' and 'ESL Providers, ' which each received 69% of the total responses. Forums were the least chosen category at only 42%.

Figure 23: Which of the following methods listed below would be your preferred method to obtain the support and information you indicated in the last question?

Mention	Percentage
Sharing of best practices	81%
Workshops	69%
ESL providers	69%
Mentorship from other employers	67%
Webinars	66%
Immigrant hiring guides	65%
Cross-cultural training courses	64%
Forums	42%
Other	3%

Respondents to the job seeker survey were given the opportunity to provide open-ended responses to some questions about the employment opportunities in the Southwest Alberta region. These responses are summarized into themes below.

Figure 24: Open-ended questions

Question	Key Themes
Which occupations have been the most difficult to fill or retain?	- Drivers - General labourers - Management personal - Technicians - Veterinarians - Welders
Thinking about skilled workers, are there any specific skills, knowledge and/or abilities that you find difficult to hire or retain?	- Analytical skills - Strong technology skills and data manipulation skills - Basic driver skills (class 1) - Strong organization and communication skills - Technical engineering skills - Heavy equipment operators - Management skills - Leadership skills and taking the initiative

Question	Key Themes
What, if any, specific educational or certification programs or training would you like to see made available in the Southwest Alberta region to support future growth of your organization?	- More trainers for the class 1 & 3 drivers' license (Note: This was highly requested) - More agricultural certification programs (e.g., equipment operation) - Heavy equipment technician training - More computer technician and basic skills certification courses - Increased availability of training for indigenous populations
How have technological change and disruptive technology impacted your business in the past 5 years?	- Airbnb has reduced hotel occupancy - Automation has reduced labour costs for low skilled roles - Greater efficiency due to more advanced equipment (but higher costs to constantly update the system and hire people with technical skills) - Greater marketing opportunities and online presence but also higher levels of competition - Greater need for training on computer skills for employees - Communication has switched to being primarily online or via text messages
How can the economic development organizations and/or post-secondary institutions best support your business in dealing with technological change over the next 5-10 years?	- Increasing computer skills training for students and allowing for ICT upskill training for current employees (e.g., Excel and other data manipulation programs) - Aiding firms to take their products and services online (e.g., workshops/grants) - Greater promotion of how automation is affecting the workforce and support for those groups most affected - Subsiding some new technology software's - Supporting greater internships in local businesses to ensure talent has opportunity to develop

Question	Key Themes
What best or promising practices have you implemented in your business to support your retention and recruitment of talent?	- Good benefits program - Health and fitness access for employee well-being (either in the office or discounted gym membership) - Accommodating work schedules for students/staff with young families - Competitive salary - Professional development opportunities - Create a positive work environment with team bonding activities
You mentioned something other as being when recruiting, hiring, and retaining employees, could you please specify the other challenge?	- Wages in the oil and gas industry are high meaning it is hard to attract talent to other sectors - Tourism is in a downturn meaning there is not enough work for people to be hired - The remoteness of communities has made it hard to access, and not is attractive to many people

Southwest Alberta Job Seeker Survey – Detailed Analysis

Summary of Key Findings

An online survey was advertised to job seekers in the SouthWest Alberta Region in March 2020. The survey ended with 56 completed questionnaires and a margin of error of +/- 13% with a 95% confidence level. Respondents were asked about their perceptions of the local labour market and the available jobs in the SouthWest Alberta Region.

As a part of the questionnaire, respondents were asked to rate various factors that may be hindering them from getting a new job/better job (Figure 15). Some key points that the responses identified were:

- **Job seekers' current job status:** The most significant proportion of respondents were currently working in a management or a cashier/helper/labourer role, and 75% of them were making less than $35 an hour.
- **Job seekers view of the job market:** If respondents could choose to work in any industry, 22% were not sure where they would like to work. When looking at job seekers' view of the job market, respondents often felt there was a lack of relevant educational programming and poor or fair jobs that match their skillset.
- **Job seekers view the job search support system:** Jobseeker respondents primarily used online job boards such as indeed and Workopolis for their job search and relied on job description information and employer websites to decide on their career paths. A large proportion of them used federal and provincial government websites to find relevant labour market information and had not worked with an employment service organization.
- **Job seekers' view on skills and training**: A large portion of job seeker respondents felt that access to opportunities and career/employment counselling would help them achieve their full employment potential. They also feel on the job training, and a professional designation would enhance their employability.

Detailed Analysis

Sample Employment Characteristics

The following section outlines the demographic and economic characteristics of the respondents in the Job Seeker survey. The respondents represented a variety of age and employment-status groups in the Southwest Alberta Region.

Figure 25: Are you currently employed?

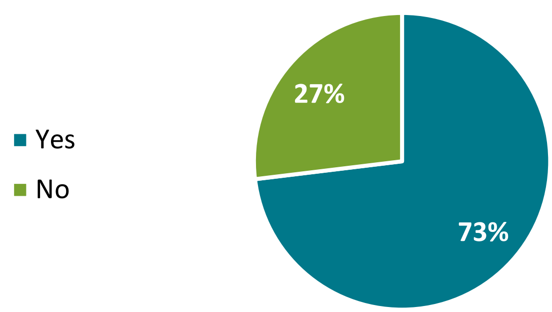


Figure 26: Are you seeking new/additional employment?

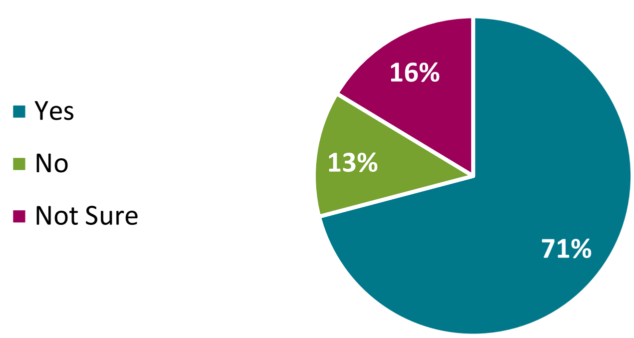


Figure 27: Do you consider yourself to be under-employed?

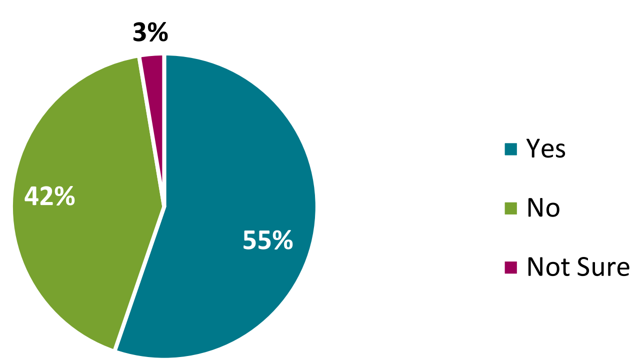


Figure 28: How long have you been actively seeking employment?

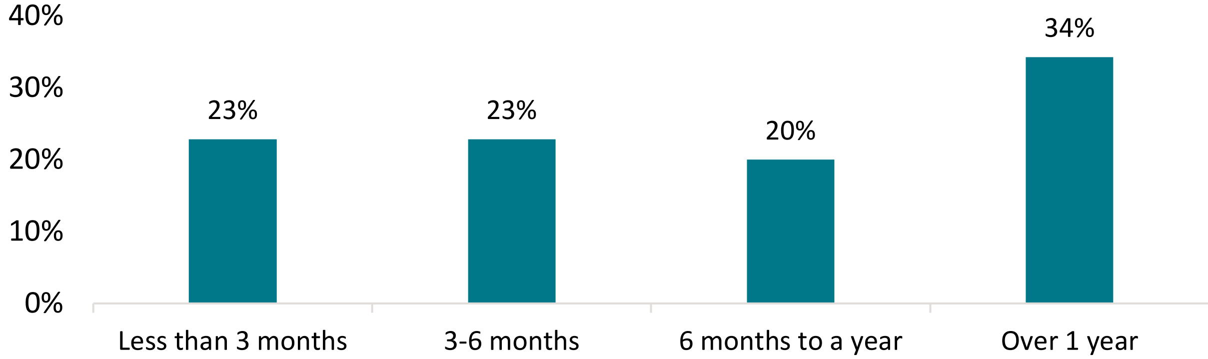


Figure 29: Would you consider moving out of the Southwest Alberta Region to secure employment?

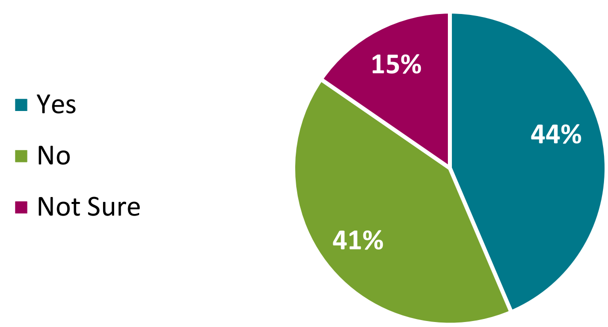
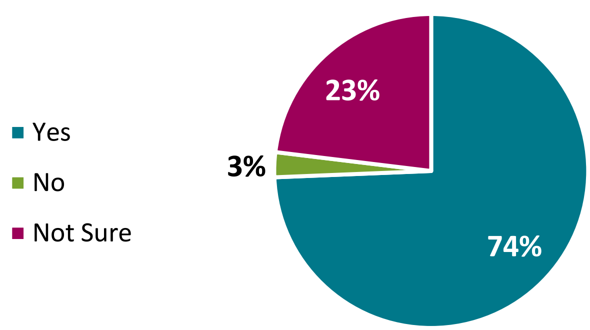


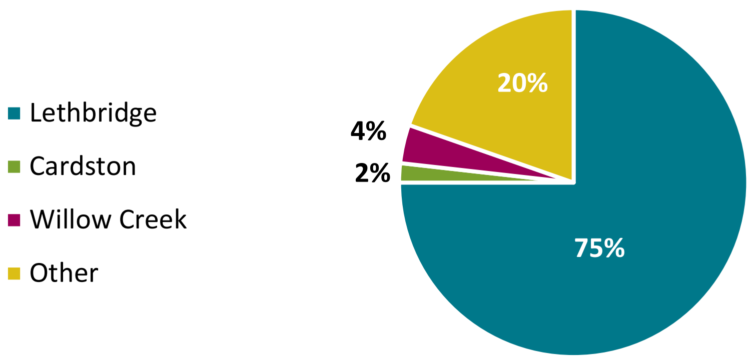
Figure 30: Would you consider retraining to be better prepared for local employment opportunities?



Residence of Respondents in the Southwest Alberta Region

75% of respondents reside in Lethbridge and, 4% are from Willow Creek, 2% are from Cardston, and 20% of respondents are in other regions such as Nobleford, Stirling, Warner County, Coutts and Milk River.

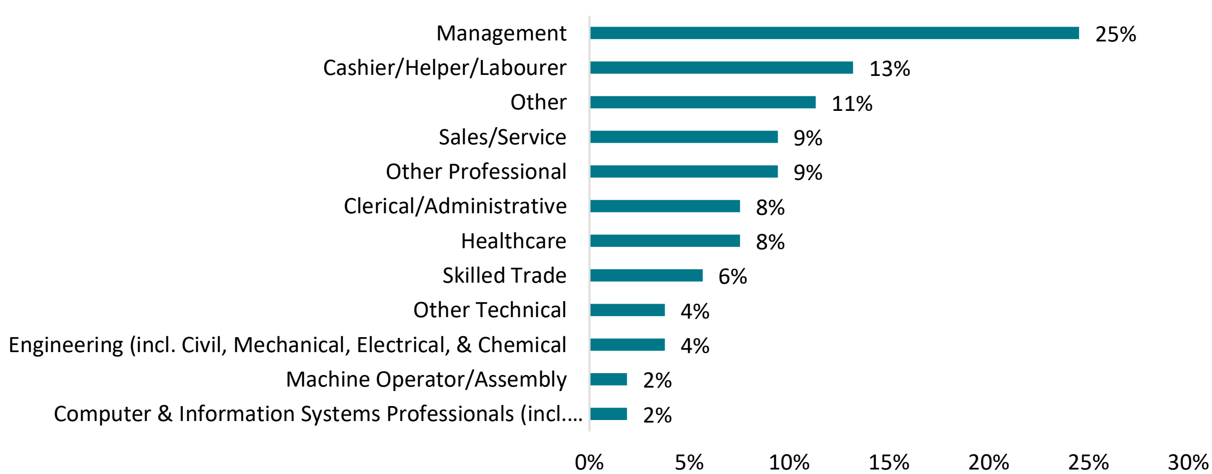
Figure 31: Where in the Southwest Alberta Region do you currently live?



Classifications of Current Job

When asked about their current jobs, the top three classifications were management at 25%, cashier/helper/labourer at 13%, and other at 11%. Other classifications included human resources, journalism, and education; among others, when respondents were asked what their specific occupations, the most common responses included cook, retail management, food delivery, janitor and sales.

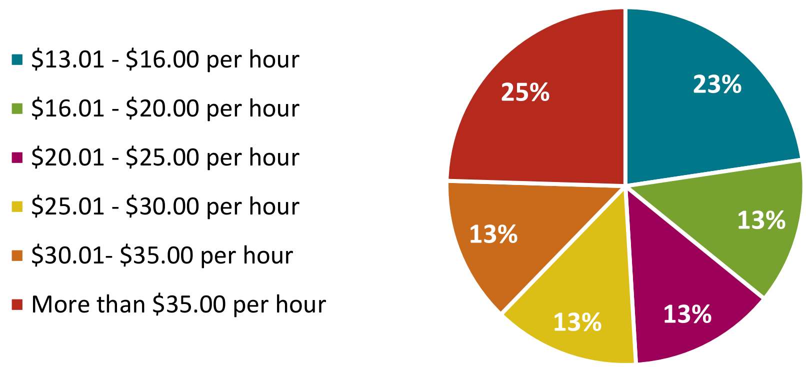
Figure 32: Which of the following best classifies your current/most recent job?



Average Hourly Wage in Current Job

When asked what the average hourly wage that respondents were receiving at the time of survey or in their most recent job, 48% of respondents stated they are making between $16.01-$35.00 per hour. 23% stated $13.01-$16.00, and 25% of respondents stated over $35/hour.

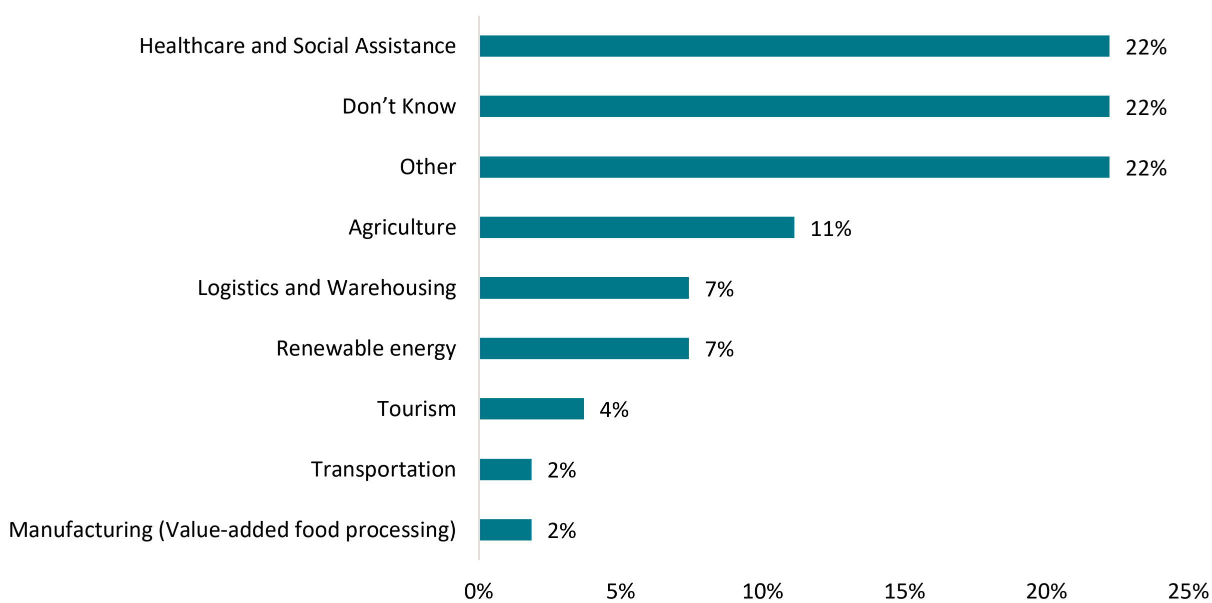
Figure 33: What is the average hourly wage (excluding benefits) you earn in your current job? If you are not currently working, please tell us the average hourly wage that you earned in your most recent job?



Industry of Preference

When asked what industries respondents would prefer to work in, 22% did not know, and 22% of respondents stated they prefer to work in the healthcare and social assistance industry. Other industries commonly mentioned include technology, communications, public sector, and business consulting.

Figure 34: In what industry would you prefer to work?



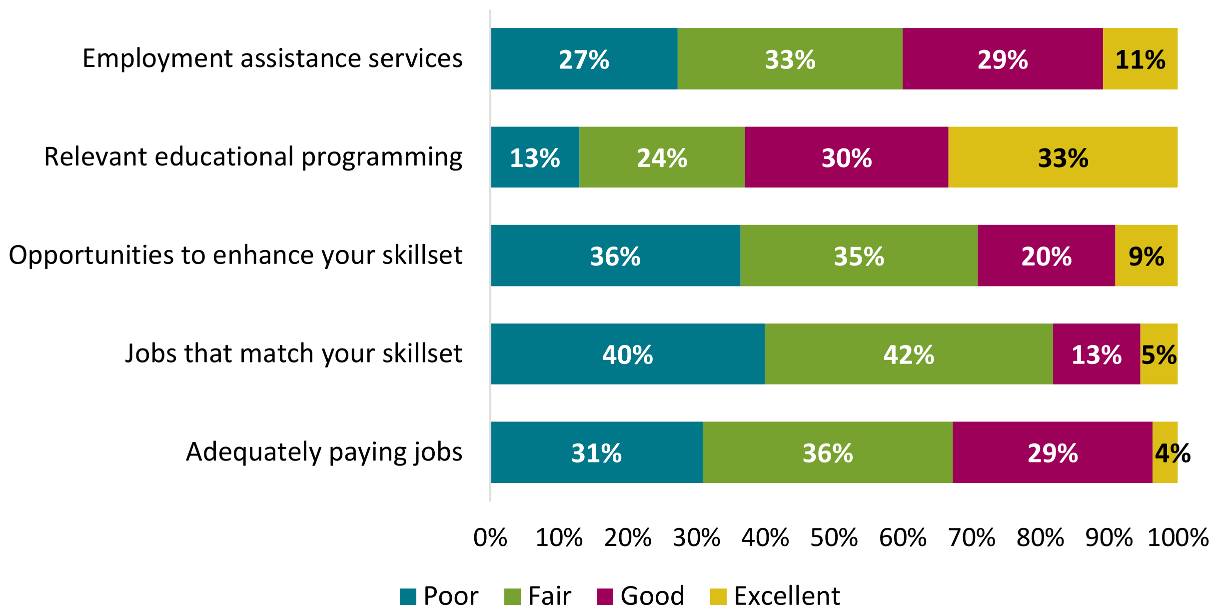
Ideal Job Based on Qualifications

When respondents were asked to think about future employment and their ideal job based on current qualifications, the most common responses were occupations such as management, policy analyst, data analyst, and dental assistant.

Rating of Employment Assets in The Region

When asked to rate the employment assets in the region, individuals rated the employment assistance services moderately, with 62% of respondents indicating these were good or fair. 63% of respondents rated the educational programming good or excellent on the other hand, 71% of respondents feel there are poor or fair opportunities to enhance their skill set, and 82% feel there are poor or fair jobs that match their skillset. 67% of respondents rated poor or fair, for adequately paying jobs.

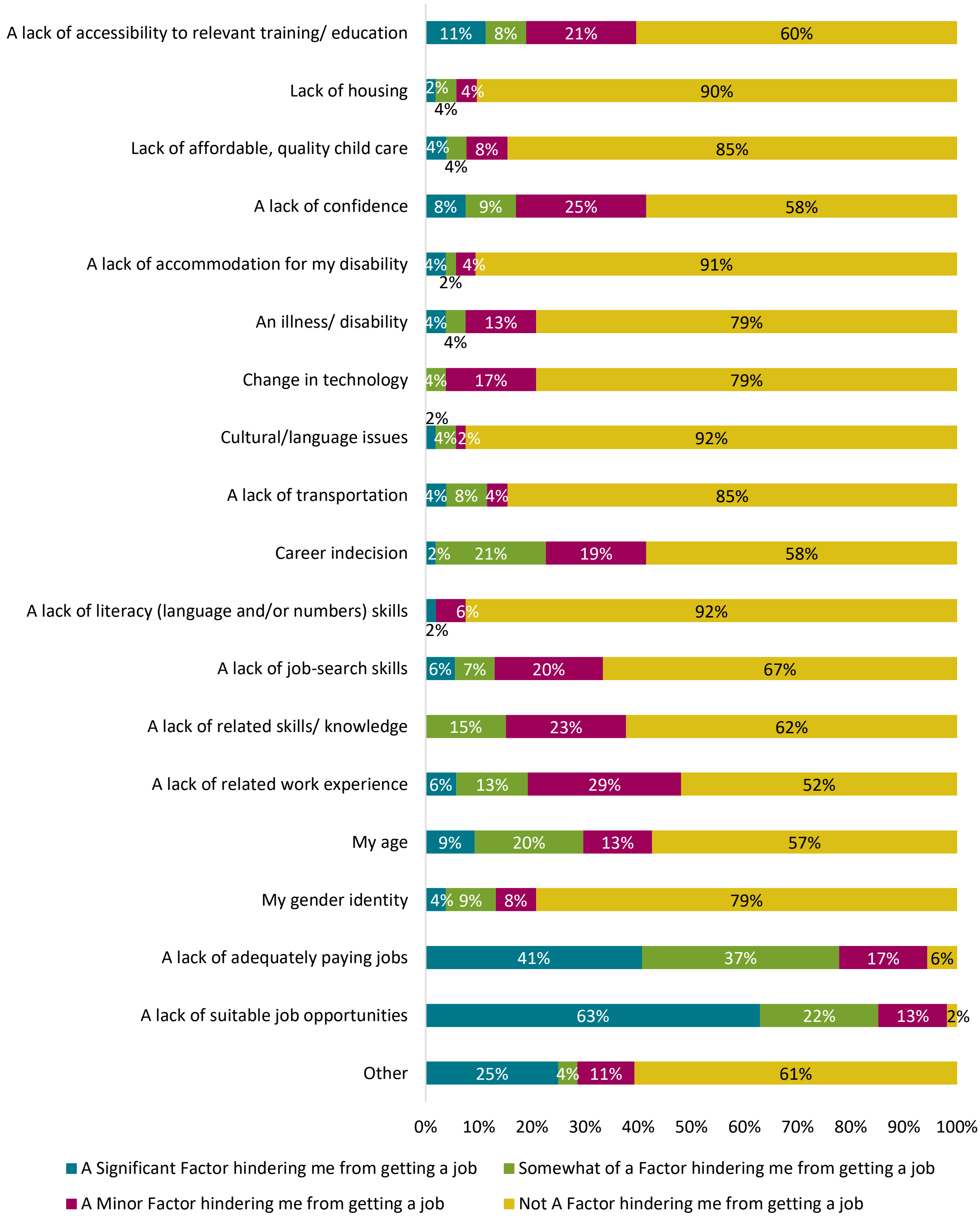
Figure 35: Please rate the Southwest Alberta region's availability …



Factors Hindering the Ability to Get a Job

When asked what factors are hindering the ability to get a job, a lack of quality paying jobs and lack of suitable job opportunities were the most noteworthy with 78% and 85% of respondents respectively stating these are factors significantly or somewhat hindering their ability to get a job. Other factors that were mentioned include employers not wanting to hire workers from the oil sands because they feel they will leave the region, insurance for international students is too high and cultural barriers, particularly for indigenous people. Respondents also felt they might lack confidence or the ability to access affordable education.

Figure 36: Which factors may be hindering you from getting a job/ a better job?



Methods Used When Looking For a job

Respondents listed the method they use to look for a job. The most commonly listed methods were online job boards, which were mentioned by 79% of respondents, social media at 45% and word of mouth at 43%. Other methods of looking for a job that were mentioned include career emails local universities and walking into workplaces and handing out resumes.

Figure 37: Which of the following methods have you used when looking for a job?

Mention	Percent
Online job boards (Indeed, Workopolis, etc.)	79%
Employer websites	48%
Social Media (Facebook, Twitter, Linkedin, Kijiji, etc.)	45%
Word of Mouth	43%
Local Employment Agencies	18%
Head-hunters, professional recruiters	11%
Job fairs/career fairs	11%
Advertising - newspaper	9%
Other	11%

Valuable Attribute When Making A Decision About Pursuing a Job

Respondents also listed the attributes of a job that they assign the most value when deciding to pursue a job. The most commonly mentioned attributes were wage rates and benefits at 88%, interesting/fulfilling work at 79% and job security, which was mentioned by 68% of respondents.

Figure 38: Which attribute do you assign the most value to when making decisions about the jobs you pursue?

Mention	Percent
Wage rates and benefits	88%
Interesting/fulfilling work	79%
Job security	68%
Work-life balance	63%
Training/advancement opportunities	54%
Company culture	52%
Flexible hours	45%
Upwards mobility	36%
Corporate responsibility	29%
Ability to participate in innovation/technological advancement	27%
Potential for remote work and work-from-home	16%

Labour Market Information, Tools or Services Used in The Past to Make Career Decisions

Respondents in the sample also mentioned some labour market information, tools and services they had used in the past to help decide their career path and choose their current industry. Commonly cited types of information were job description information/occupational and skill profiles (66%), employer websites (59%), and wage and benefits (57%).

Figure 39: Which of the following labour market information, tools or services have you used in the past to decide your career path and choose your current industry?

Mention	Percent
Job description information/occupational and skill profiles	66%
Employer websites	59%
Wage rates and benefits	57%
Job/resume banks	50%
Employer databases/links	29%
Licensing/credential requirements	20%
Availability of workers in the industry	18%
Occupational shortages and surpluses	16%
Employer recruiting practices	16%
Availability of training institutions for specific occupation	16%
I have never used labour market information, tools or service	13%
Legal requirements/labour code information	9%
Hiring of special employee groups (e.g. employment equity gr	4%

Sources Used to Find Relevant Labour Market Information in

The sources respondents used most often to find relevant labour market information were Federal government websites/publications such as business services (50%), provincial government website/publication (45%) and educational institutions, which was mentioned by 36% of respondents. Other sources mentioned include websites such as LinkedIn, Glassdoor and Indeed.

Figure 40: What source(s) do you typically use to find relevant labour market information?

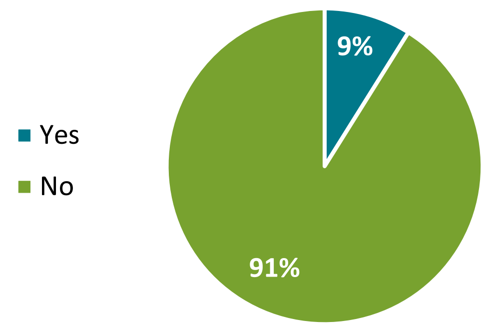
Mention	Percent
Federal government website/publication such as Business Service	50%
Provincial government website/publication	45%
Educational institution	36%
Colleagues	27%
Professional association/union/employee association	20%
Local employment support organizations	20%
Sector Council/Industry association	16%
Local business associations	14%
Private consulting firm	11%

Mention	Percent
Equipment suppliers	5%
Other	7%

Working with an Employment Specialist

91% of respondents reported that they were not using an employment services representative.

Figure 41: Are you currently working with an employment service organization to help you conduct your job search?



Assistance Needed to Achieve Full Employment Potential

Respondents in the sample also mentioned the types of assistance that they feel they need to achieve their full employment potential. The majority (79%) of respondents felt they needed more access to opportunities. Other commonly-mentioned assistance tools were career/employment counselling (34%) and skills training (27%). Respondents who selected the 'other' category commonly mentioned the potential benefits of mentors working in their industry.

Figure 42: What assistance do you need to achieve your full employment potential?

Mention	Percent
Access to opportunities	79%
Career/employment counselling	34%
Skills Training	27%
Jobseeker assistance	21%
Access to labour market information	14%
Retraining programs	14%
None, I don't need any assistance	5%
Other	13%

Types of Training That Would Enhance Employability

When asked what types of training respondents would consider enhancing their employability, 'on the job training' was the option selected the most often (48%). A professional designation (39%) or a university degree (32%) were also commonly mentioned. Advanced skills training (advanced excel, outlook, time management, project management) that did not involve going back to university was commonly mentioned in the 'other' category.

Figure 43: Which of the following types of training would you consider to enhance your employability?

Mention	Percent
On the job training	48%
Professional Designation	39%
University Degree	32%
Essential Skills	29%
Certification	21%
College Diploma	20%
Apprenticeship	9%
None, I don't need any additional training	9%
Other	7%

Additional Information Needed to Be Successful in Your Job Search

When respondents were asked what, if any additional information they needed to be successful in their job search, they responded with information on job qualifications, education needs, and extra guidance from a life coach.

Background Demographic Information

Figure 44 Which of the following represents your age?

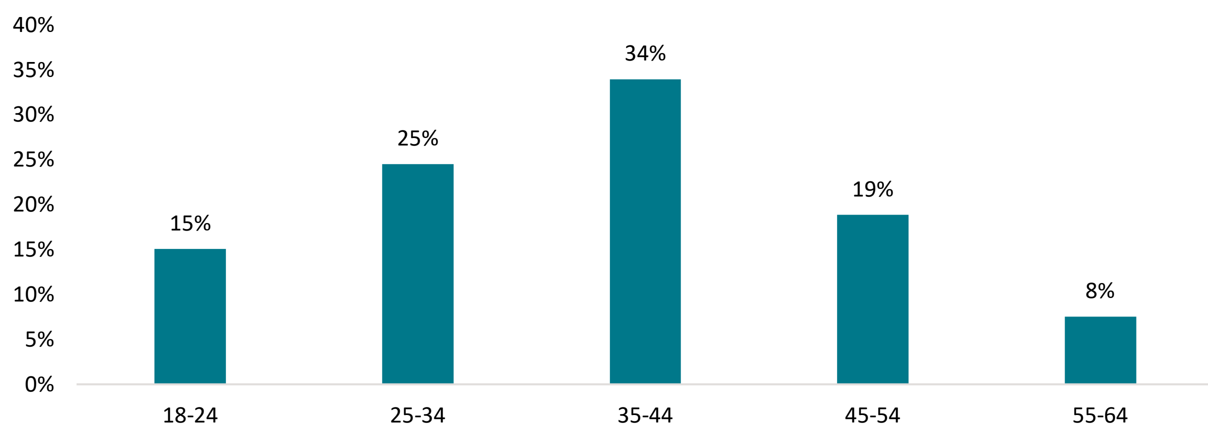


Figure 45: What is the highest level of educational attainment you have?

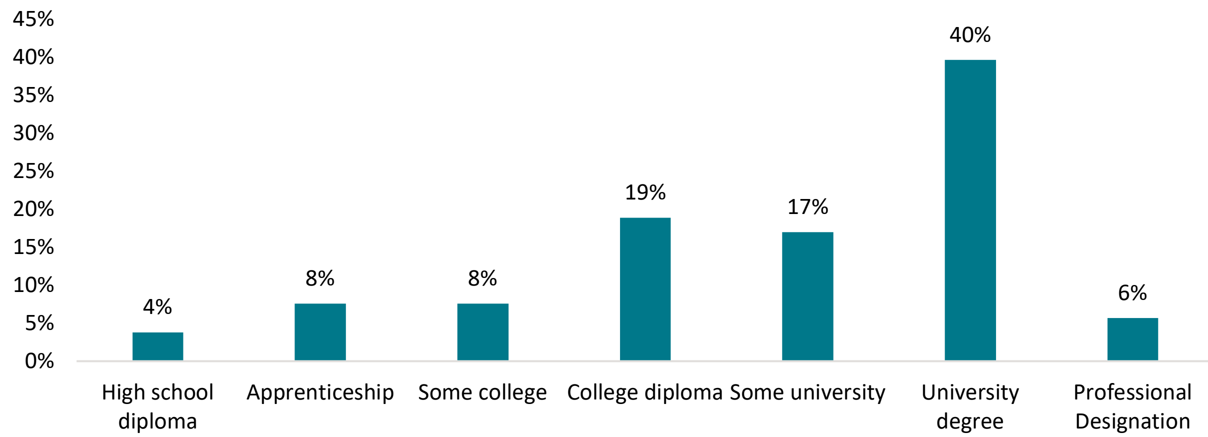
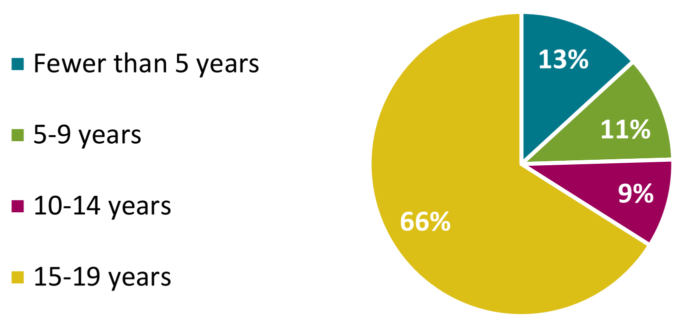
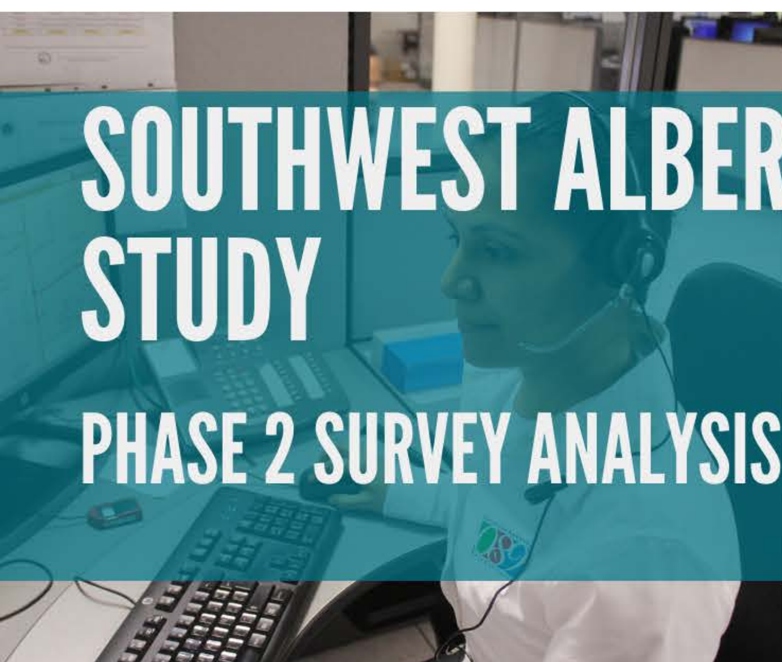


Figure 46: How long have you lived in the Southwest Alberta region?





SOUTHWEST ALBERTA REGIONAL SKILLS STUDY

PHASE 2 SURVEY ANALYSIS REPORT

Survey Input Summaries

Second Phase Business Survey

As a part of the Regional Skills Study, local employers were surveyed about their business's experiences with workforce recruitment, retention and skills. The survey was conducted via Computer-Assisted-Telephone-Interviewing. This methodology yielded 95 responses from businesses in the Southwest Alberta region, with a margin of error of +/- 10.1% using a 95% confidence level. The survey was completed in two phases: the first ran in March 2020 and the second in June 2020. Since the first phase was completed leading up to the COVID-19 pandemic in Canada, some additional questions were included in the second phase surrounding the impacts of the pandemic on local businesses. This report describes the outcomes of the second phase survey, and also the changes in the responses compared to the first phase report (the first phase report is included separately).

Summary of Survey Insights

COVID-19 has hampered business growth: One of the core focuses of the second phase business survey was to understand the impacts and implications of COVID-19. The pandemic has had a significant impact on local business productivity, growth, and employee retention. For example, 71% of businesses indicated that business activity had decreased significantly or slightly during the crisis, with less than 5% stating there had been any business growth at all.

During COVID-19, more employers temporary laid-off staff instead of terminating their contracts: A positive trend identified was of those employers that reduced staff numbers, 36% temporarily laid-off their workforce compared to the 17% of respondents who indicated they terminated staff contracts. Furthermore, 35% of respondents indicated that they re-hired back previously laid off staff. Overall, the data suggests that Federal and Provincial COVID-19 support programs such as the Canadian Emergency Response Benefit (CERB) are proving effective at encouraging employee retention.

Businesses have been forced to adapt workplace policies in response to COVID-19: Adapting quickly to the pandemic was a core insight gathered from the survey with top mentioned responses including limiting employee travel (37%), shortening hours of operation (33%) and requiring employees to work from home (24%). Additionally, employers noted greater focus had been placed on supporting employee's complete professional development training (24%). Overall, nearly half of respondents felt that if the pandemic continues or worsens, it will be business as usual, and only 22% mentioned potentially needing to lay off more staff.

Transitioning to a work from home model is gaining momentum: As noted above, working from home has gained considerable traction for many employers during the pandemic, with nearly half (46%) of respondents indicating that 1 to 49 percent of their workforce can work from home. However, more progress must be made to completely transition jobs online, with only 12% of respondents indicating their whole workforce is now digital.

Business satisfaction is still high for operating within Southwest Alberta: 95% of respondents indicated they were either very satisfied or somewhat satisfied with operating a business in the Southwest Alberta region.

Pre-COVID-19, the availability of qualified candidates and an ageing workforce/retirement were

critical regional issues: 62% of respondents indicating lack of qualified candidates to be either a significant challenge or somewhat of a challenge and 22% regarding an ageing workforce

Difficulties with labour attraction/retention remain critical indicators of employers likelihood of remaining in the region: A critical insight noted was that for over half of businesses (57%), difficulties with labour retention is either very likely or somewhat likely to impact their decision to remain operating in the region.

Conversely, before the pandemic, the availability of transportation and childcare were the least challenging issues: With 92% of respondents feeling that availability of transportation was not a challenge or not much of a challenge, followed by 88% of respondents regarding the availability of childcare.

Nearly half of businesses are still considering hiring within the next 12 months and require skilled employees: 48% indicated they are planning to hire within the year. The top two in-demand occupations mentioned were skilled trade (28% mentions) and sales/service occupations (26% mentions).

The highest priority workforce factors in Southwest Alberta were the availability of experienced workers, availability of a trained, local workforce, and marketing efforts describing the overall quality of life: These factors received a high priority ranking and represented potential avenues for improvement.

Key Changes from First Phase Local Employer Survey

Overall, businesses' ratings of local factors improved in the second phase compared to the first phase: In rating to what extent various factors were a challenge when recruiting, hiring, and retaining employees in their organization, all of the factors included had a higher proportion of businesses responding 'Not a factor' in the second phase compared to the first phase. Similarly, businesses were asked to rate the level of satisfaction with a range of local workforce factors, and each factor had a higher rating in the second phase compared to the first. While one might expect the impact of COVID-19 to have the opposite effect due to the workforce difficulties caused by the pandemic and provincial emergency order, the more significant issues caused by the pandemic (legislated closures, loss of business, broken supply chains, etc.) may be overshadowing the workforce issues as significant concerns for the organizations. Further, in June 2020, Alberta (and much of Canada) was already in a recovery phase, which may have influenced the business's overall outlook and optimism in a positive manner.

Some Challenges have shifted in the second phase: Amongst the potential challenges for recruiting, hiring, and retaining employees, drug and alcohol problems had become less of a significant factor among organizations. In contrast, the availability of adequate housing had moved up in businesses' relative ratings of factors (note that these are relative rankings since all factors were rated as less significant challenges overall compared to the first phase).

Some workforce priorities had changed in the second phase: Amongst the ratings of workforce factors in Government and non-profit/community support activities moved lower in the priority ranking, primarily due to the increase in performance ratings of this factor. Two factors had shifted upwards in their relative priority - marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the broader marketplace; and the productivity of a trained, local workforce. Both of these factors showed an increase in their relative importance (the amount which organizations' overall satisfaction with operating a business in Southwest

Alberta relates to the factor). As potential explanations, the former factor may be attributable to the difficulties currently experienced in the tourism industry, and the latter could be due to the difficulties experienced by organizations in keeping the workforce productive during times of physical restrictions and virtual communications.

The relative importance of many factors to organizations had not changed: When rating the significant challenges for recruiting, hiring, and retaining employees, the availability of qualified candidates was the factor which was most often rated as a significant challenge in both the first and second phases. Similarly, language barriers and availability of transportation were some of the least likely factors to be rated as a significant challenge by the organizations in both phases of the survey. The two highest-ranking priorities in both phases of the survey were the availability of experienced workers and the availability of a trained local workforce.

1.1 Second Phase Job Seeker Survey

The second phase online survey was advertised to Job seekers in Southwest Alberta in June 2020. The survey ended with 215 completed questionnaires and a margin of error of +/- 6.7% with a 95% confidence level. Respondents were asked about their perceptions of the local labour market and the available jobs in the Southwest Alberta Region after COVID-19.

Summary of Survey Insights

Implications of COVID-19: 79% of respondents mentioned very likely or likely going to consider employment in occupations that you may not have considered in the past. Post COVID-19, Food services, healthcare, and agriculture are the most prominent sectors seeing an increase in job postings. Furthermore, 49% of respondents are temporarily or permanently laid off, and 16% have had their hours reduced.

Job seeker's current job status: A large proportion of respondents are currently working in a clerical/administrative or a healthcare role, and 86% of them are making less than $35 an hour.

Job seekers view the job market: If respondents could work in any industry, 24% are not sure where they would like to work, but 25% would choose healthcare and social assistance, and 8% would choose agriculture. When looking at job seekers' view of the job market, respondents often feel there are relevant educational programming and poor or fair jobs that match their skillset and opportunities to enhance their skill set.

Job seekers view the job search support system: Jobseeker respondents primarily use online job boards such as indeed and Workopolis and social media for their job search. A large proportion of them use job description information/occupational and skill profiles and wage rates and benefits to find relevant labour market information and do not work with an employment service organization.

Job seekers view on skills, training, and local support: A large portion of job seeker respondents feel access to opportunities and skills training would help them achieve their full employment potential. They also feel on the job training, and certification would enhance their employability.

Key changes and themes between the first and second phase Job Seeker Survey

Profile of Job Seekers: The first report included 56 respondents, while this second report has a much larger sample size of 215 respondents. There was a noticeable increase in the proportion of respondents aged 55+ who made up 8% in report one and 17% in report two. On the other hand, there was a decrease in respondents aged 35-44 who made up 34% of respondents in the first phase and 21% in the second phase. There was also a proportionality higher number of respondents with a university degree (40%) in phase 1 compared to phase 2 (26%).

Employment Characteristics of Job Seekers: While 73% of respondents were employed in the first phase, less than half (47%) were employed in the second phase. Despite this significant difference in current employment, 75% are seeking new/additional employment in phase 2, which is only 4% higher than the 71% of respondents in phase 1. On the other hand, 53% of respondents are considering moving out of the Southwest Alberta Region to secure employment in report two relative to 44% of respondents in the first report. There is also a more substantial proportion of respondents that have been seeking work over the last 3-6 months in report two at 35%, then report one at 23% of respondents. This may be derived from the shutdown of many parts of the economy in March 2020 due to COVID-19.

Job seeker's current job status: Between reports one and two, management and sales/service was replaced by clerical/administrative and healthcare in the top proportions of sectors that best-classified respondents' current/most recent job. Both clerical/administrative and healthcare rose from 8% of respondents to 13% between reports one and two. It is also noteworthy that the proportion of respondents making over $35/hour dropped from 25% in report one to 14% in report two.

Job seeker's view of the job market: The top four industries of preference have not changed between reports one and two, but it is notable that the number of respondents preferring health care and risen from 22% to 25%. Job seekers' view of the job market is very similar between reports. Still, it is noted that in report two, a higher proportion of job seekers rated poor or fair to Southwest Alberta's ability to provide relevant educational programming, employment assistance, opportunities to enhance their skill sets, and adequately paying jobs by differing degrees. Wage rates and benefits and interesting/fulfilling work were the most mentioned attributes when deciding on pursuing a job among respondents in both reports. There is also a higher proportion of respondents in report two that feel a lack of skills/knowledge and a lack of related work experience were factors hindering them from getting a job/a better job. 62% in report two felt a lack of skills/knowledge was a factor relative to 38% in report one 62% in report two felt a lack of related work experience was a factor relative to 48% in report one

Job seekers view the job search support system: In both phases, job seekers primarily use online job boards such as indeed and Workopolis for their job search and rely on job description information and employer websites to decide on their career paths. In both reports majority of respondents stated they do not work with an employment service organization.

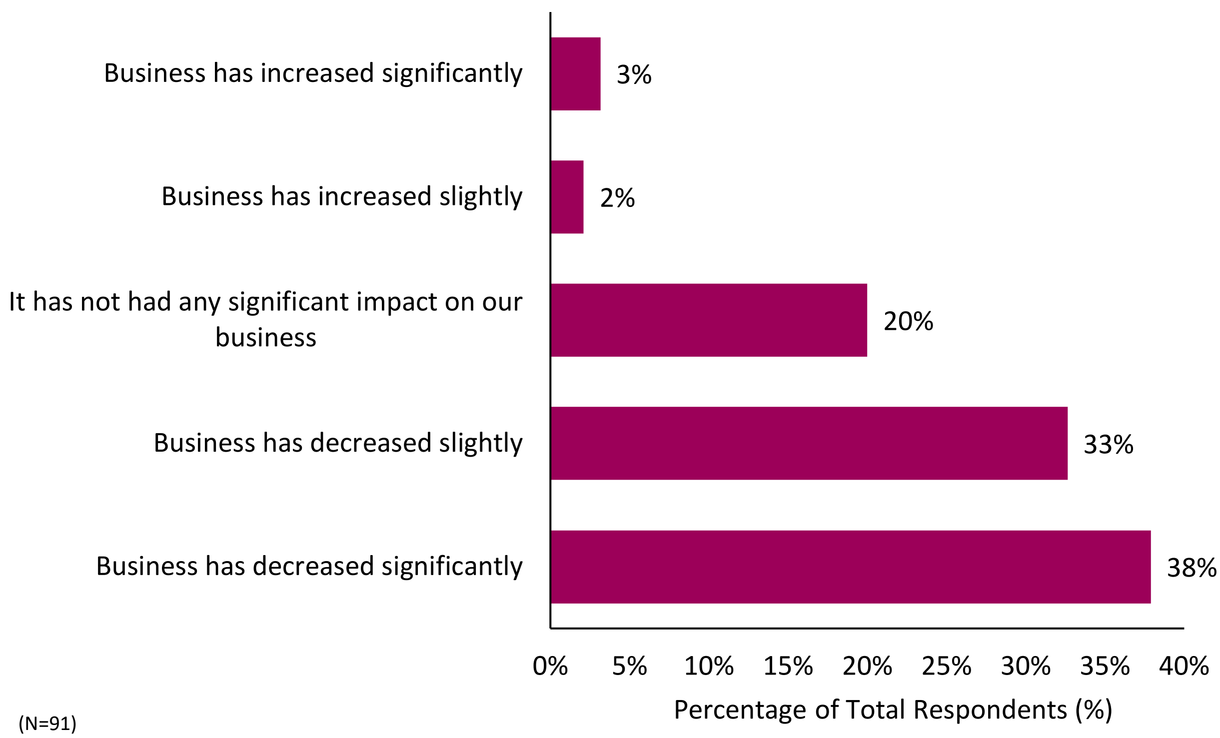
Job seeker's view on skills, training, and local support: In both phases, a large portion of job seeker respondents felt access to opportunities would help them achieve their full employment potential. In addition to this, respondents in report one also emphasized employment counselling. In phase 2, they emphasized skills training. In both reports, respondents felt on the job training and formal training (professional designation or a certification) would enhance their employability.

Second Phase Local Employer Survey Detailed Analysis

Impact of COVID-19

Businesses were asked to provide feedback on the extent to which the recent COVID-19 virus had impacted the health of their business (Figure 1). Based on the survey findings, nearly two-fifths (38%) of respondents indicated that businesses had decreased significantly, and a further 33% that there had been a slight decrease in business activity. Only 20% of respondents indicated there had not been a significant impact, and less than 6% that business activity had increased.

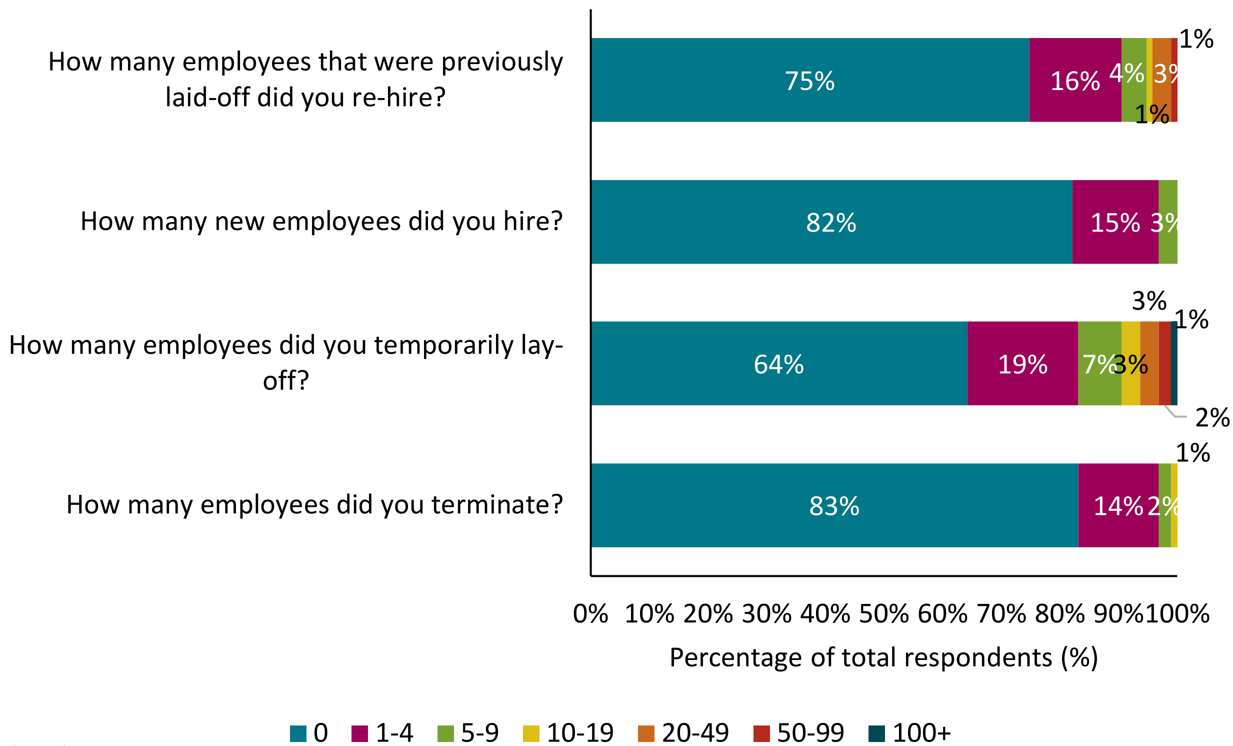
Figure 1: Please indicate which of the following best describes the extent to which the COVID-19 virus has had an impact on the health of your business?



(N=91)

Respondents were then asked several questions related to staffing during COVID-19. When asked how many employees they terminated during COVID-19, 83% of respondents indicated 0, with only 16% terminating between 1-9 employees. Respondents asked to indicate how many employees were temporarily laid off during the pandemic, with 64% stating they did not lay anyone off and 26% between 1 to 9 employees. Overall, the majority of respondents did not hire new employees during the crisis (82%), and if they did, it was between 1- 4 employees (15% of respondents). On a positive note, 20% of respondents indicated that they re-hired between 1-9 employees who were previously laid-off and 4% that they re-hired between 10-99 employees.

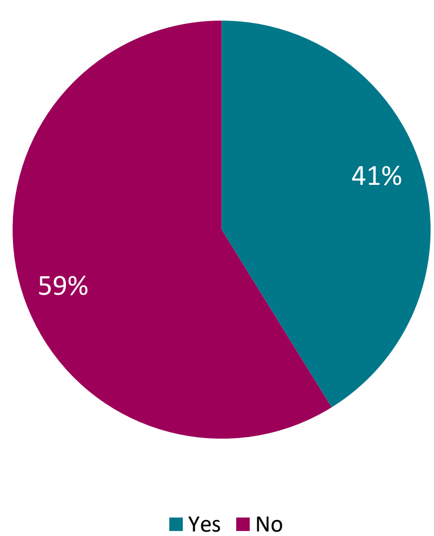
Figure 2: As a result of COVID 19, please respond to the following staffing questions:



(N=95)

Out of the 17 employers that hired during COVID-19, 59% of them felt that the new employees brought a different skill set to their workplace.

Figure 3: Did the new employees you hired bring a different skill set to your workplace?



(N=17)

The respondents listed the types of measures that they had taken in response to COVID-19. The most common included limiting employee travel (37% of responses), shortening the hours of operation (33%), and requiring employees to work from home (24%). Key themes identified in the 'other' response category (35% of responses) were incorporating new sanitary measures at work, updating the workplace safety and training policies, and limiting client interaction where possible. Only 15% of respondents noted that they had not taken any measures, and it was business as usual.

Figure 4: Which of the following measures have you taken in response to COVID-19?

Response	Frequency	Percent
We have limited employee travel	35	37%
We have shortened our hours of operation	31	33%
We now require employees to work from home	23	24%
We have supported staff to complete professional development	23	24%
We have had to take on additional liabilities (loan, capital injection)	22	23%
We have temporarily closed our business	15	16%
Business as usual, no measures taken	14	15%
We have extended our hours of operation	4	4%
Other	33	35%
Total Respondents	**95**	**100%**

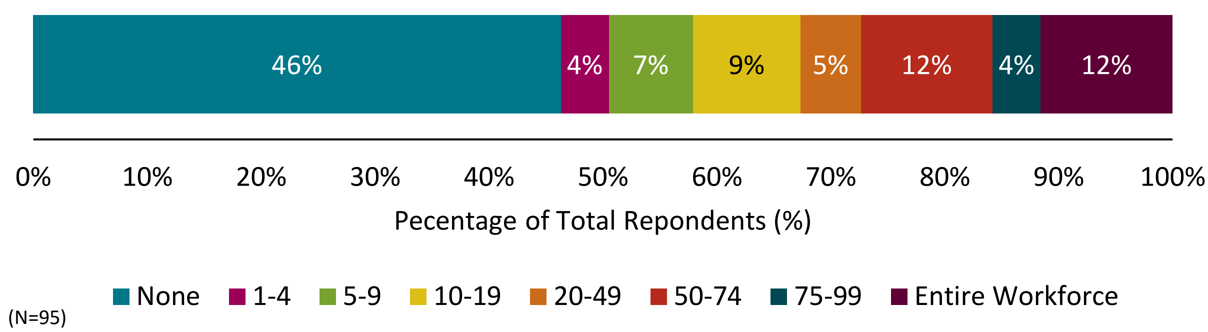
Respondents also listed their outlook if the current COVID-19 situation continues or worsens in the next 90 days. The majority of responses were that they would continue as business as usual (47%), with 22% stating they would have to lay off staff. Only 4% of respondents mentioned that they would need to permanently close their business, and 12% that they would need a temporary business closure. Notable responses within the 'other' category stated that their outlook would depend on further action taken by the Government (e.g., the continuation of the wage subsidy program) and reinstating working from home practices if the situation worsens.

Figure 5: If the current situation either continues or worsens, what is your outlook for the next 90 days?

Response	Frequency	Percent
Business as usual	45	47%
We will need to lay off staff	21	22%
We will need to take out a loan to keep operating	16	17%
We will need to shorten our hours of operation	17	18%
We will need to close our business temporarily	11	12%
We will need to close our business permanently	4	4%
Other	12	13%
Total Respondents	**95**	**100%**

In Figure 6, respondents were asked to indicate the proportion (%) of their workforce that can work remotely. The results indicate that nearly half (46%) of the workforces surveyed can not work remotely, and a further 26% of respondents indicating that 1 to 49 percent of their workforce could perform their job from home. Overall, only 12% of respondents felt that their entire workforce could work remotely.

Figure 6: What proportion of your workforce is able to perform their job, working remotely from home?



Businesses surveyed were also asked to indicate which out of a list of activities (Figure 7) they had undertaken during the pandemic. 38% of respondents mentioned that they had considered committing to future investment in skill development for staff, and 35% that they had re-evaluated the skill required to support their future business operations. Conversely, only 20% of businesses mentioned that had invested in skill development for staff and 8% that they had accessed funding to support skill development. It is important to note that the majority of responses within the 'other' category stated that they had done nothing regarding skill development or that the actions they had taken were not listed in the figure below.

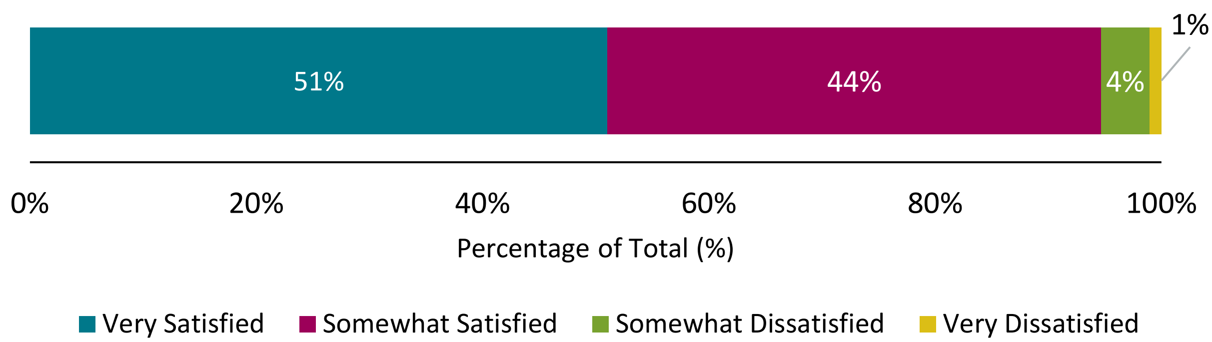
Figure 7: Have you undertaken any of the following activities during COVID-19?

Response	Frequency	Percent
Considered committing to future investment in skills development for staff	36	38%
A re-evaluation of the skills required to support future operations	33	35%
Committed to future investment in skills development for staff	29	31%
Identified skills gaps in your current workforce	28	29%
A re-evaluation of the skills required to support current operations	27	28%
Invested in skills development for my staff	19	20%
Accessed funding to support skills development	8	8%
Other	44	46%
Total Respondents surveyed	**95**	**100%**

General Survey Findings

As can be seen in Figure 8, nearly all of the respondents (95%) were either very satisfied for somewhat satisfied operating a business in the Southwest Alberta region. This 'top 2-box' ranking increased from the Southwest Business Survey before COVID-19 in March 2020, where 91% of businesses surveyed indicated that they were very or somewhat satisfied operating a business in the region.

Figure 8: Overall, how satisfied are you with operating a business in the Southwest Alberta region?

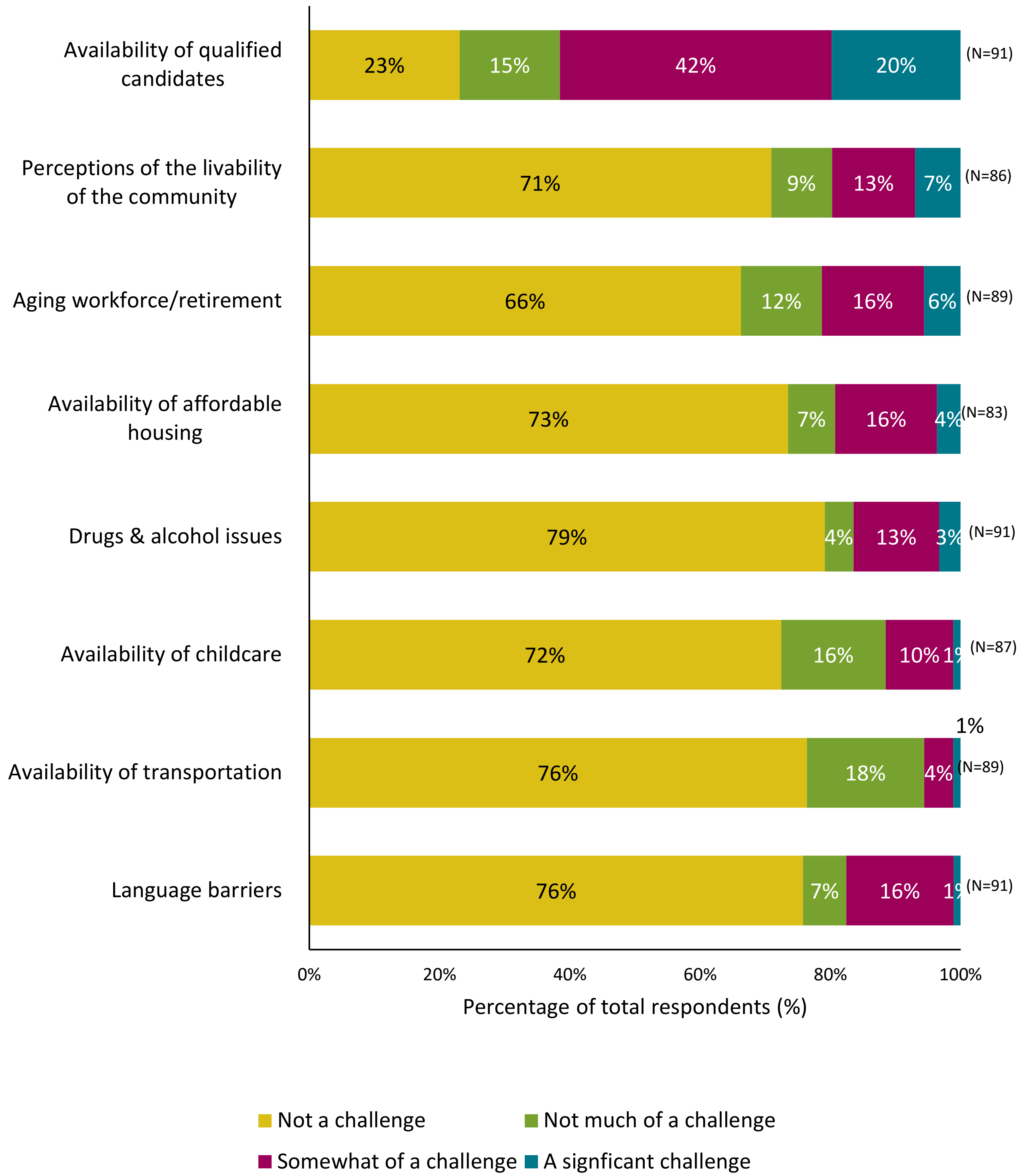


(N=95)

Figure 9 provides an overview of the respondent's opinions regarding recruiting, hiring, and retaining employees before the pandemic. Based on the findings, 62% of employers had either a significant challenge or somewhat of a challenge with the availability of qualified candidates, followed by an ageing workforce/retirement at 22% of total respondents. The perception of the liveability of the community and availability of affordable housing were other challenging factors for many employers, with a combined 20% of respondents respectively stating it was a significant or somewhat of a challenge. Conversely, employers had the least challenge with drug and alcohol issues (79%), the availability of transportation (76%). Note, respondents that indicated 'don't know' have been removed from the sample size for this question.

Compared to the Employer Survey completed in March 2020, businesses in June 2020 were much more likely to rate the potential challenges in Figure 9 as not a challenge. While this may seem counter-intuitive given the difficult economy compared to the pre-COVID times, it is possible that the listed issues were less of a concern due to the growing relative concern surrounding other issues (such as emergency closures and switching to electronic sales/communication). Comparing the relative positions of the factors, drug and alcohol problems moved down the list as a relative concern, and the availability of affordable housing moved up the list.

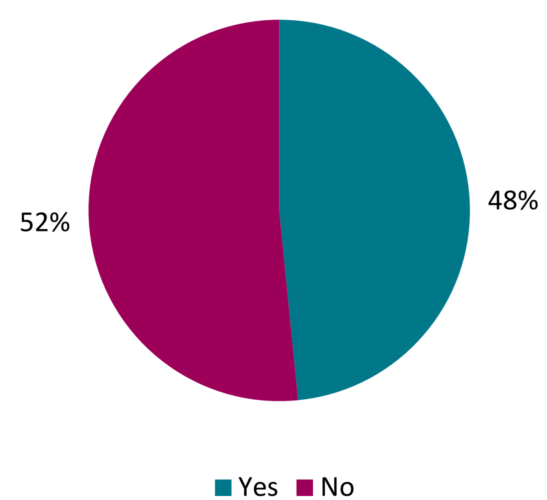
Figure 9: Thinking pre-COVID 19, to what extent was each of the following a challenge when recruiting, hiring, and retaining employees in your organization?



Other Key Questions

When asked about their hiring intentions for the next 12 months, 48% answered that they were intending to hire new staff. This metric had decreased from the March 2020 Employer survey, where 52% had responded that they intended to hire new employees in the next 12 months.

Figure 10: Are you planning to hire new employees in the next 12 months? (this does not include re-hiring those that may have been laid off due to COVID 19)



(N=95)

Of those 46 respondents who indicated that they were planning to hire staff in the next 12 months, the top three occupations that were mentioned included skilled trade (28% of mentions), sales/service (26% of mentions) and clerical/administrative (17% of mentions). Conversely, engineering (including Civil, Mechanical, Electrical & Chemical) and other professional occupations were the occupations that employees mentioned least. Of those 8% respondents that mentioned other, the most common responses were for truck drivers and general labourers.

Compared to the March 2020 Employer Survey, cashier/helper/labourer had decreased in relative mentions from 30% of respondents mentioning this occupation in March, to 17% of respondents mentioning this in the current survey. Meanwhile, the relative proportion of businesses mentioning that they expect to hire skilled trades had increase from 23% in March to 28% in June.

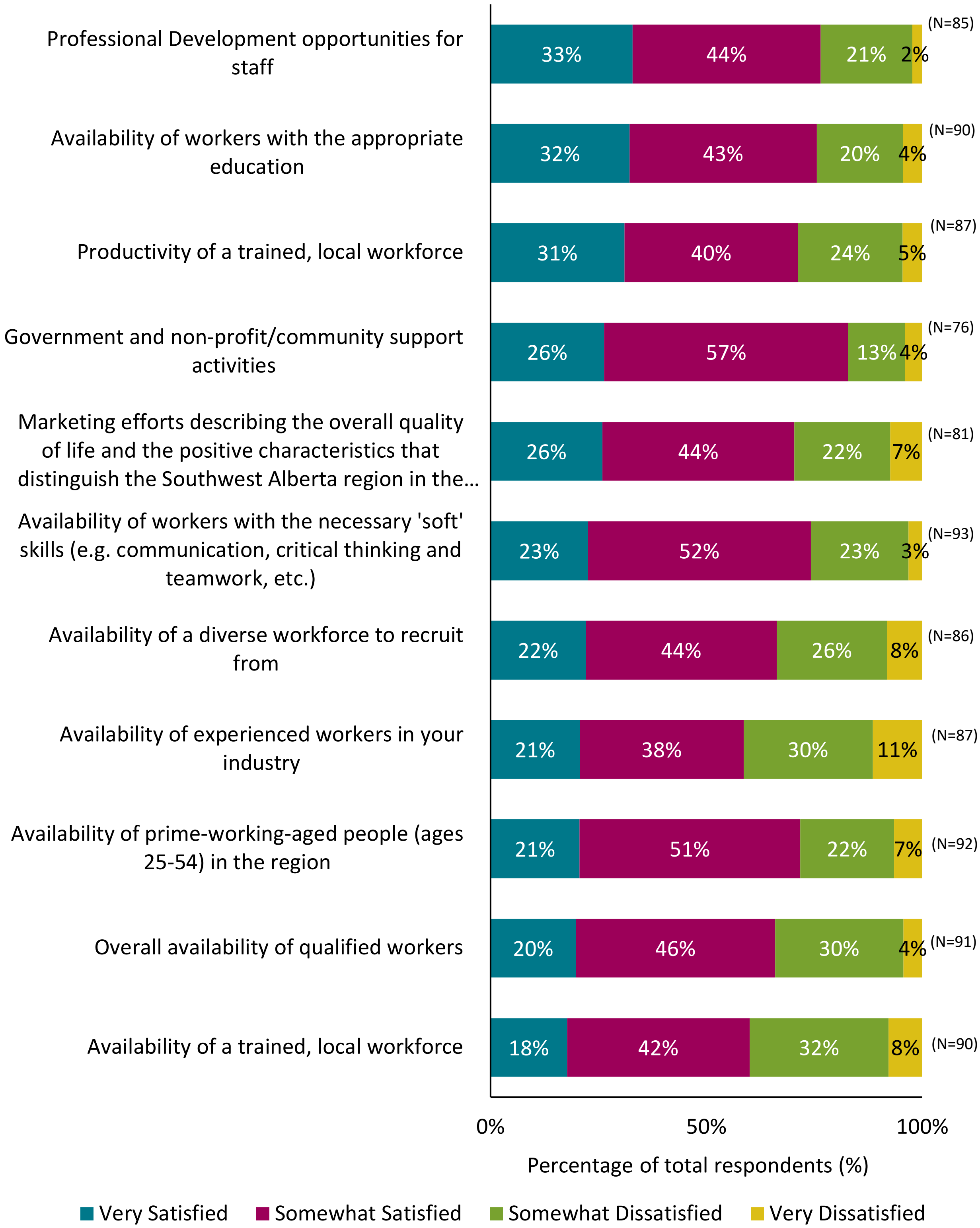
Figure 11: Which occupations/positions do you expect you will most likely require?

Response	Frequency	Percent
Skilled Trade	13	28%
Sales/ Service	12	26%
Clerical/ Administrative	8	17%
Cashier/ Helper/ Labourer	8	17%
Management	6	13%
Other Technical	5	11%
Machine Operator/ Assembly	5	11%
Computer & Information Systems Professionals (incl. software developers, database management, and information systems	4	9%
Engineering (incl. Civil, Mechanical, Electrical, & Chemical)	1	2%
Other Professional	1	2%
Other	8	17%
Total	**46**	**100%**

For Figure 12, respondents were asked to indicate their level of satisfaction for a number of factors. Based on the findings, businesses were 'most satisfied' with the number of professional development opportunities for staff (33%), followed by the availability of workers with the appropriate education (32% and the productivity of a trained local workforce (31%). Furthermore, when 'very satisfied' and 'somewhat satisfied' responses are combined the leading factors were government and non-profit/community support activities (combined 83%) and the availability of workers with the necessary 'soft' skills (e.g., communication, critical thinking, and teamwork, etc.) (combined 75%). On the flip side, respondents were 'most dissatisfied' the availability of experienced workers in their industry (11%) and the availability of a diverse workforce to recruit from (8%). Note respondents that stated 'don't know' were removed from the sample size.

The level of satisfaction tended to increase between the March and June surveys across the various the workforce factors. The proportion of businesses rating themselves as very or somewhat satisfied with the Government and non-profit/community support activities showed a notably large increase from 62% to 83%. The same top-2-box metric for availability of workers with the necessary 'soft' skills (e.g. communication, critical thinking and teamwork, etc.) also increased substantially from 61% in March to 74% in June.

Figure 12: For each of the following statements, please indicate your level of satisfaction



Each of the workforce factors in the table above was analyzed using their relationship with each businesses response to the Key Performance Indicator question - "Overall how satisfied are you with operating a business in the Southwest Alberta region?". MDB Insight's measure of derived importance (shown in Figure 13) demonstrates the degree to which each factor is related to Overall Satisfaction in the area. Together, alongside the level of performance on each factor (the proportion of businesses rating themselves very or somewhat satisfied), the priority ranking is created. Factors with a high priority ranking tend to have high importance and relatively low performance.

In Southwest Alberta, the highest priority workforce factors were the Availability of experienced workers in your industry, Availability of a trained, local workforce, and Marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace. The factors with a high priority rank in Figure 13 represent potential avenues for improvement, as these factors are important to businesses and have room for improvement.

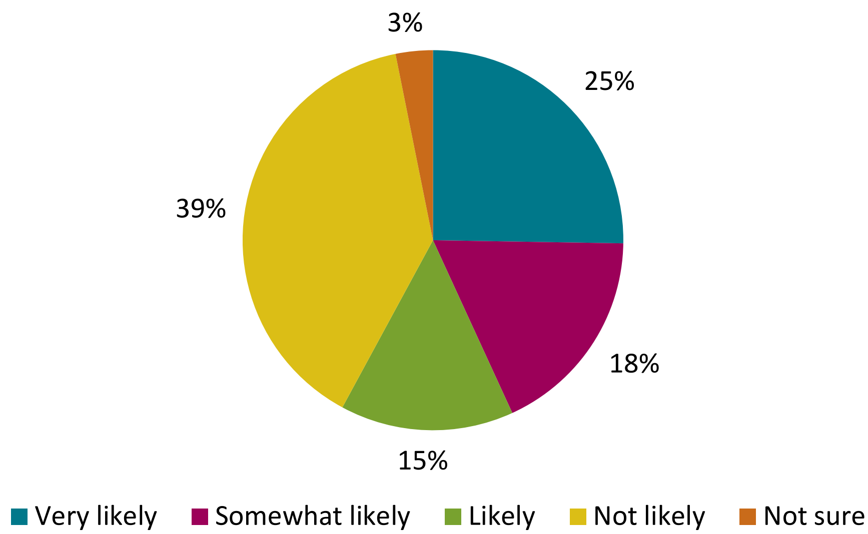
Compared to the March survey, while the relative priority levels of most of the factors remained similar, there were some notable changes. Government and non-profit/community support activities moved lower in the priority ranking, primarily due to the increase in performance ratings of this factor. The factor, "marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace" had moved up in priority ranking, due to both an increase in the level of importance of this factor, as well as a relatively small increase in performance compared to the other factors. This latter point may be a function of the difficulties experienced by the tourism industry during COVID-19. Further, the productivity of a trained, local workforce had also moved up in priority ranking. The level of importance attributed to this factor had increased substantially, which may be attributable to the difficulties of businesses keeping their workforce productive during times of physical restrictions and virtual communications.

Figure 13: Priority matrix depicting the relative priority of workforce issues in Southwest Alberta

Factor	Level of Importance	Performance	Priority Rank
Availability of experienced workers in your industry	7.4	59%	1
Availability of a trained, local workforce	6.6	60%	2
Marketing efforts describing the overall quality of life and the positive characteristics that distinguish the Southwest Alberta region in the larger marketplace	8.8	70%	3
Productivity of a trained, local workforce	8.5	71%	4
Overall availability of qualified workers	7.1	66%	5
Availability of a diverse workforce to recruit from	6.5	66%	6
Availability of prime-working-aged people (ages 25-54) in the region	7.0	72%	7
Availability of workers with the appropriate education	7.7	76%	8
Professional Development opportunities for staff	8.0	76%	9
Availability of workers with the necessary 'soft' skills (e.g., communication, critical thinking, and teamwork, etc.)	6.8	74%	10
Government and non-profit/community support activities	7.1	83%	11

When businesses were asked if difficulties with labour retention would impact their decision to remain operating in the region (Figure 13), 57% of respondents stated 'very likely' or 'somewhat likely.' This number had increased from 46% in the March survey.

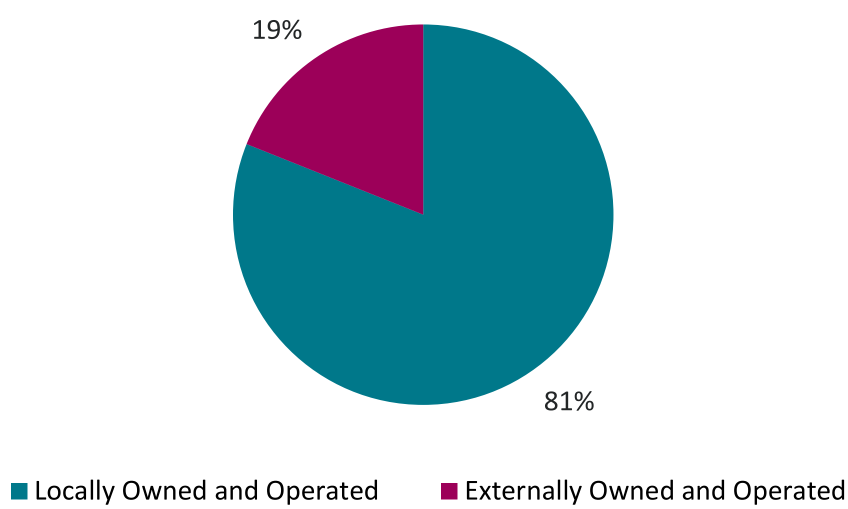
Figure 14: How likely are difficulties with skilled labour retention or recruitment to influence your decision to remain operating your organization in the Southwest Alberta region?



(N=95)

When asked how to best describe their organization (Figure 14), 81% of respondents stated that they were locally owned and operated.

Figure 15: Which of the following best describes your organization?



(N=95)

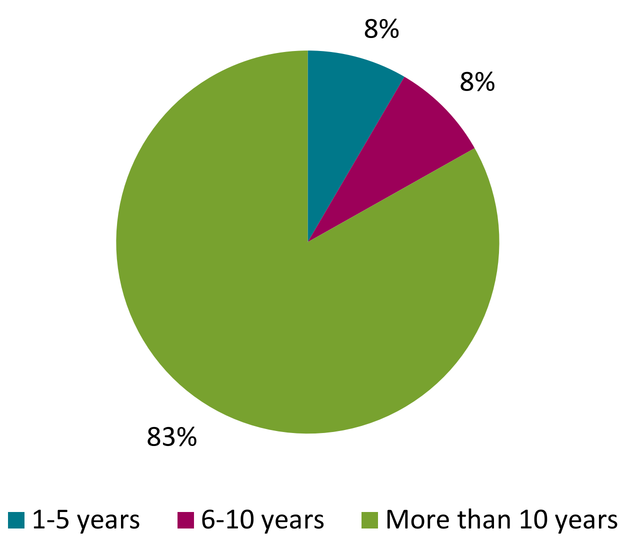
The majority of respondents mentioned that their businesses were located in Lethbridge (68%), followed by Taber (12%) (Figure 15). The top locations mentioned within the 'other' category (27%) included Picture Butte and Calgary.

Figure 16: In what communities is your organization located?

Response	Frequency	Percent
Lethbridge	65	68%
Taber	11	12%
Cardston	3	3%
Vulcan County	2	2%
Town of Vulcan	2	2%
Fort Macleod	2	2%
Other	26	27%
Total	**95**	**100%**

When asked how long their business had operated in the region (Figure 16), the majority of respondents stated for more than 10 years (83%).

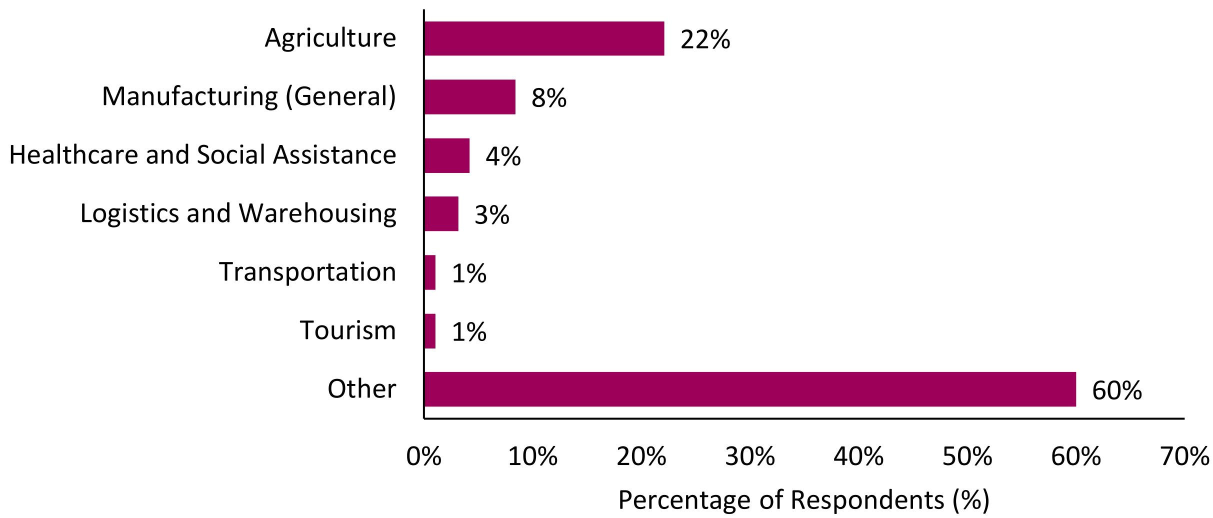
Figure 17: How many years has your organization operated in the region?



(N=95)

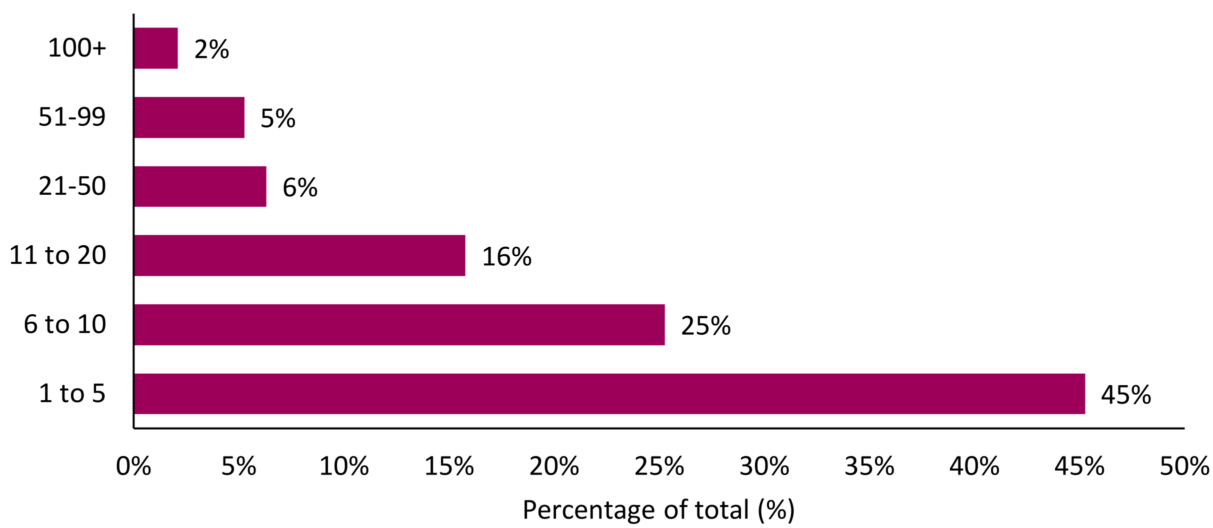
Figure 18 shows the breakdown of respondents but their businesses primary activity. 22% of respondents stated they were within the agriculture sector, followed by manufacturing (general) (8%) and healthcare and social assistance (4%). The top sectors noted within the 'other' category included construction, retail, and professional services (e.g. consultants).

Figure 18: Which of the following industries best describes your organization's primary activities?



Most businesses surveyed had between 1 to 10 people (70% of respondents) and less than 7% indicated that they had more than 51 full-time employees (Figure 18).

Figure 19: Including yourself, how many full-time employees (30 hours or more) do you employ whose primary place of work is in the Southwest Alberta region?



Second Phase Job Seeker Survey Detailed Analysis

Sample Employment Characteristics

Figure 20: Are you currently employed?

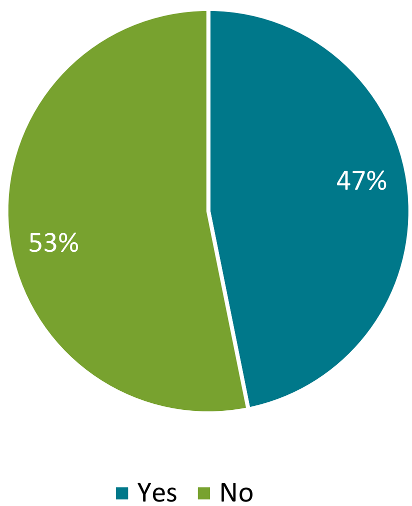


Figure 21: Are you seeking new/additional employment?

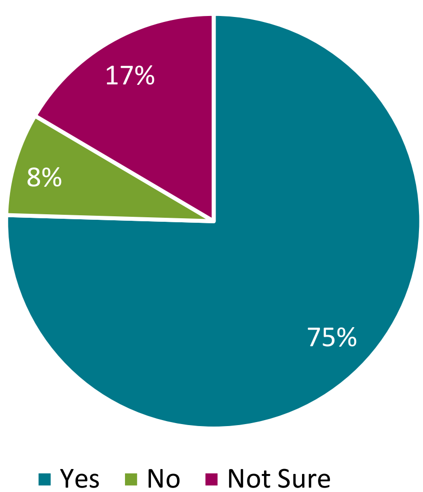


Figure 22: Do you consider yourself to be under-employed?

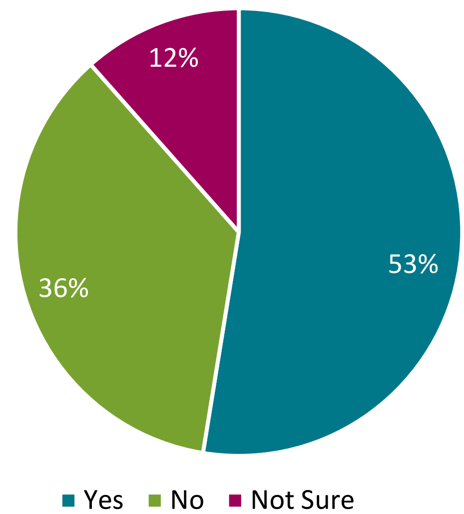


Figure 23: How long have you been actively seeking employment?

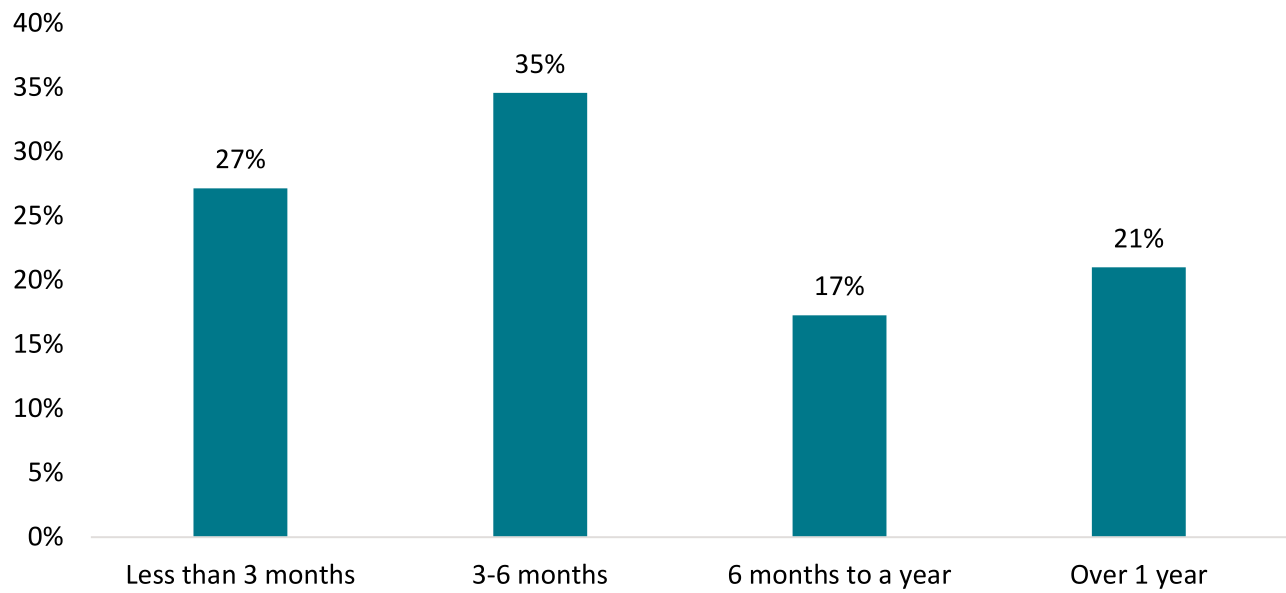


Figure 24: Would you consider moving out of the Southwest Alberta Region to secure employment?

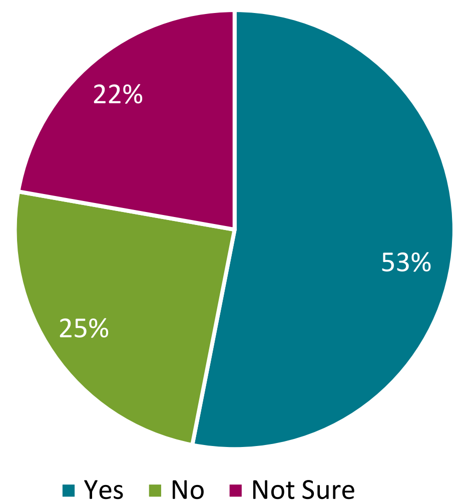
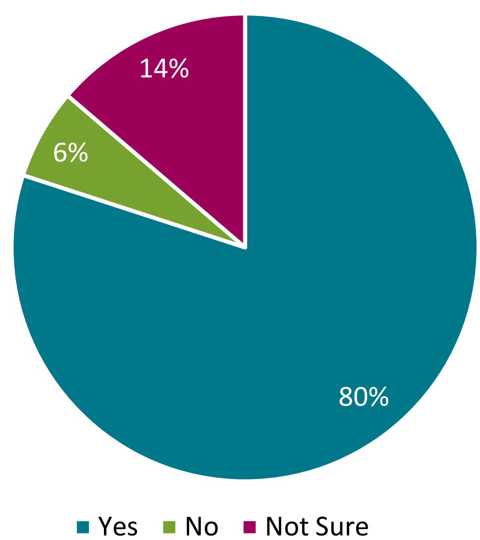


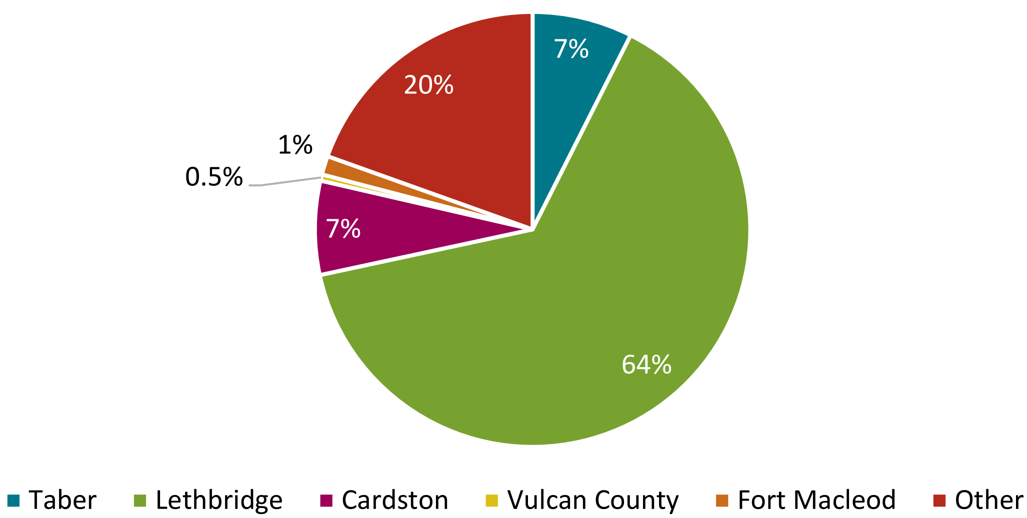
Figure 25: Would you consider retraining to be better prepared for local employment opportunities?



Residence of Respondents in the Southwest Alberta Region

64% of respondents reside in Lethbridge and, 7% are from Cardston, 7% are from Taber, 1% are from For Macleod, 0.5% are from Vulcan County, and 20% of respondents are in other regions such as Pincher Creek, High River, Coaldale and Crowns Pass

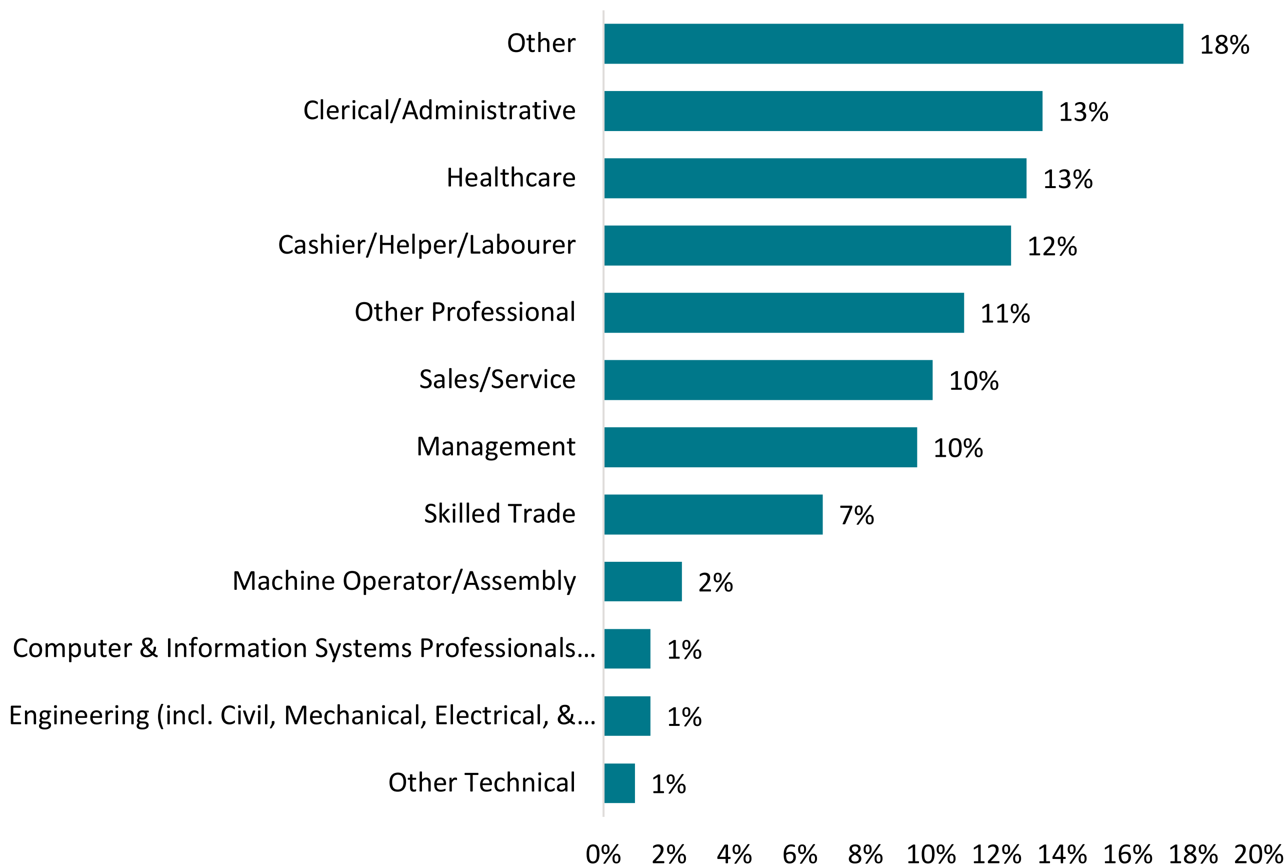
Figure 26: Where in the Southwest Alberta Region do you currently live?



Classifications of Current Job

When asked about their current jobs, the top three classifications after "other" (18%) were clerical/administrative roles at 13%, healthcare at 13%, and cashier/helper/labourer at 12%. Other classifications included childcare, journalist, education, and animal care.

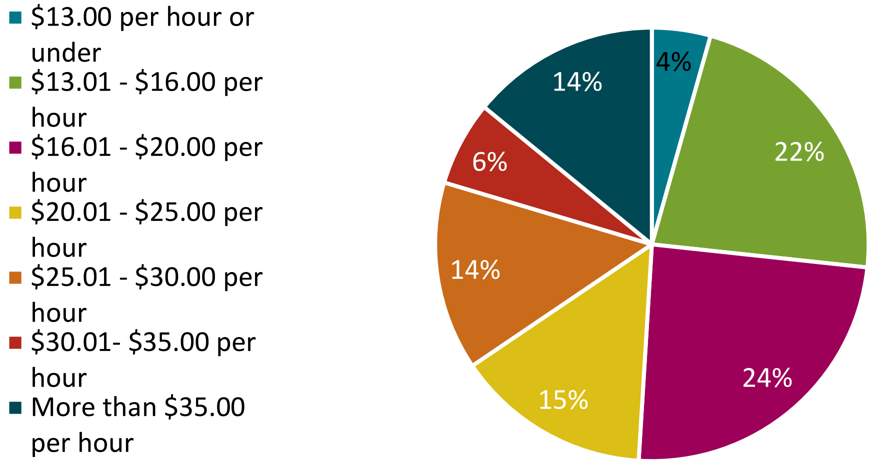
Figure 27: Which of the following best classifies your current/most recent job?



Average Hourly Wage in Current Job

When asked what the average hourly wage that respondents were receiving at the time of survey or in their most recent job, 53% of respondents stated they are making between $16.01-$35.00 per hour. 22% stated $13.01-$16.00, 4% stated $13.00 or less and 14% of respondents stated over $35/hour.

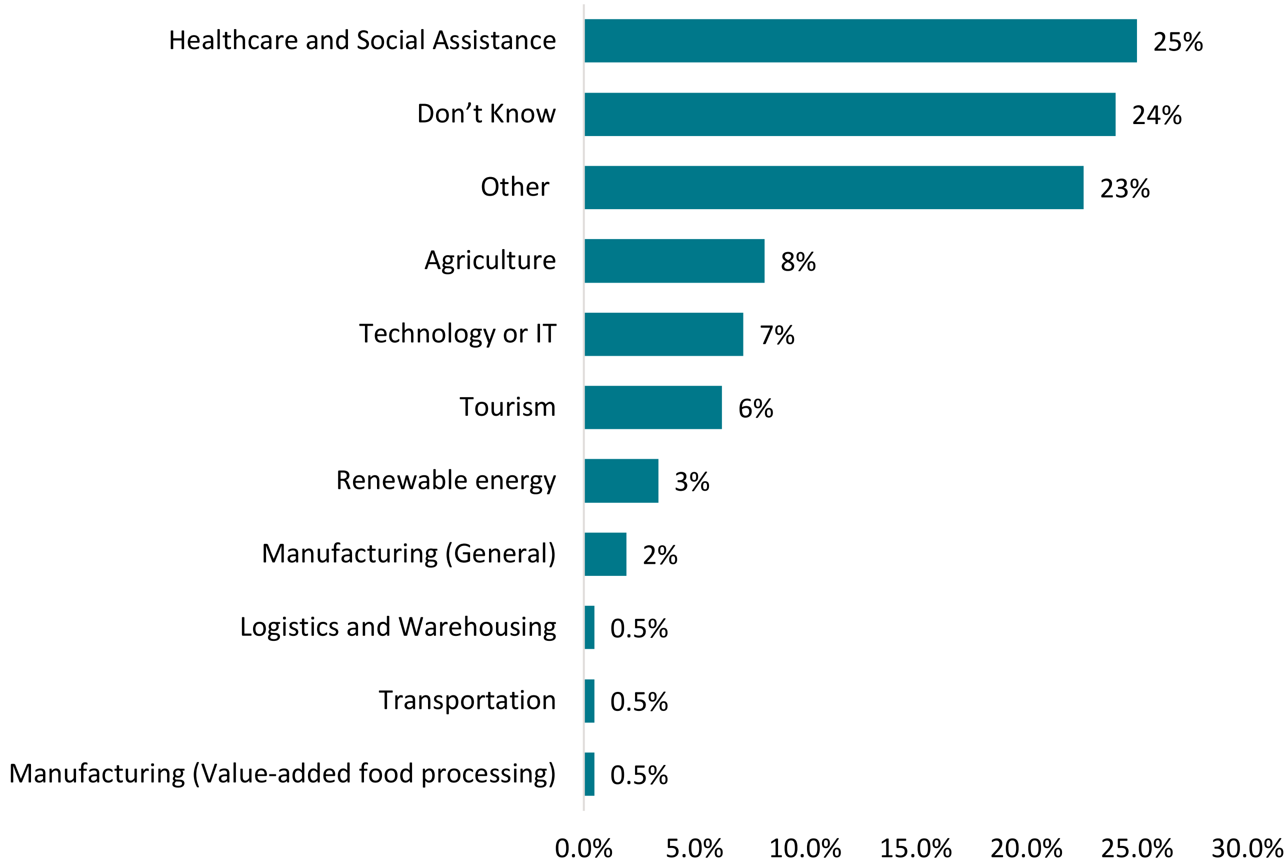
Figure 28: What is the average hourly wage (excluding benefits) you earn in your current job?



Industry of Preference

When asked what industries respondents would prefer to work in, the highest proportion of respondents (25%) mentioned the healthcare and social assistance industry, and 24% of respondents did not know. Other industries commonly mentioned include childcare, arts and culture, and hospitality.

Figure 29: In what industry would you prefer to work?



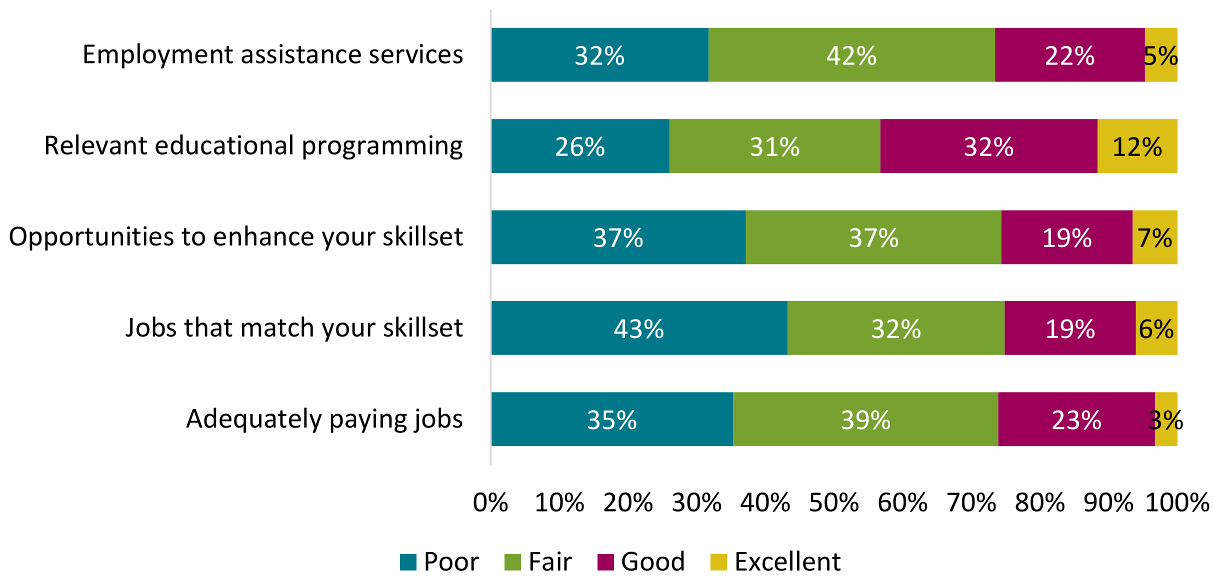
Ideal Job Based on Qualifications

When respondents were asked to think about future employment and their ideal job based on current qualifications, the most common responses were occupations such as management, healthcare worker, accounting and roles in the trades.

Rating of Employment Assets in The Region

When asked to rate the employment assets in the region, individuals rated the employment assistance services moderately, with 64% of respondents indicating these were good or fair. 44% of respondents rated the educational programming good or excellent on the other hand, 74% of respondents feel there are poor or fair opportunities to enhance their skill set, and 75% feel there are poor or fair jobs that match their skillset. 74% of respondents rated poor or fair, for adequately paying jobs.

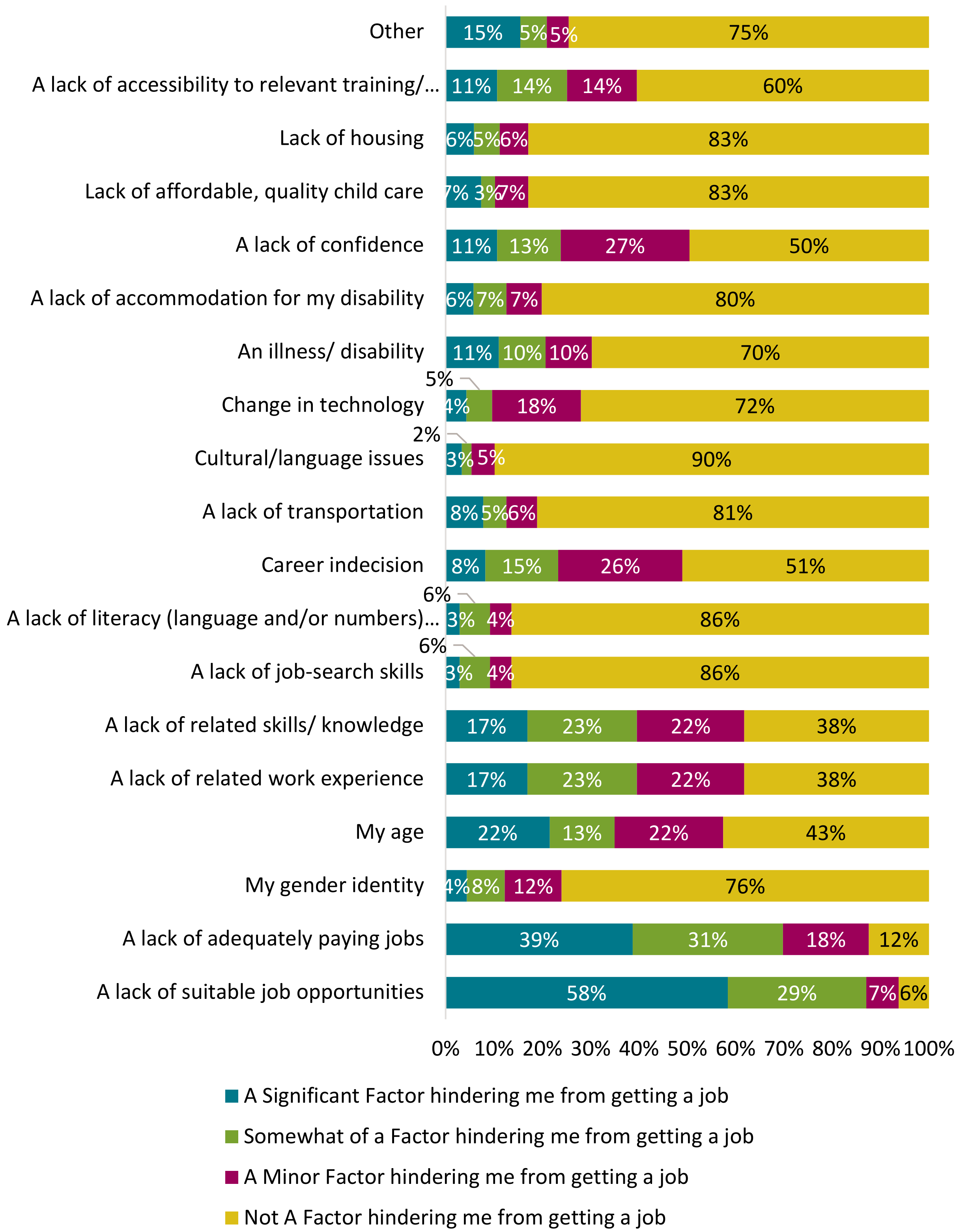
Figure 30: Please rate the Southwest Alberta region's availability of…



Factors Hindering the Ability to Get a Job

When asked what factors are hindering the ability to get a job, a lack of adequately paying jobs and lack of suitable job opportunities were the most noteworthy with 70% and 87% of respondents respectively stating these are factors significantly or somewhat hindering their ability to get a job. Other factors that were mentioned include healthcare concerns around hiring new workers, criminal records, and racial bias.

Figure 31: Which factors may be hindering you from getting a job/ a better job?



Methods Used When Looking For a job

Respondents listed the method they use to look for a job. The most commonly listed methods were online job boards, which were mentioned by 82% of respondents, social media at 64% and word of mouth at 54%. Other methods of looking for a job that was mentioned include networking events and handing out resumes.

Figure 32: Which of the following methods have you used when looking for a job?

Mention	Percent
Online job boards (Indeed, Workopolis, etc.)	82%
Social Media (Facebook, Twitter, Linkedin, Kijiji, etc.)	64%
Word of Mouth	54%
Advertising - newspaper	14%
Local Employment Agencies	7%
Other	3%

Valuable Attribute When Making A Decision About Pursuing a Job

Respondents also listed the attributes of a job that they assign the most value when deciding to pursue a job. The most commonly mentioned attributes were wage rates and benefits at 86%, interesting/fulfilling work at 77% and job security, which was mentioned by 71% of respondents.

Figure 33: What is most important to you when making decisions about the jobs you pursue?

Mention	Percent
Wage rates and benefits	86%
Interesting/fulfilling work	77%
Work-life balance	71%
Job security	71%
Flexible hours	51%
Training/advancement opportunities	51%
Company culture	49%
Potential for remote work and work-from-home	27%
Upwards mobility	26%
Ability to participate in innovation/technological advancement	20%
Corporate responsibility	19%

Labour Market Information, Tools or Services Used in The Past to Make Career Decisions

Respondents in the sample also mentioned some labour market information, tools, and services they had used in the past to help decide their career path and choose their current industry. Commonly cited types of information were job description information/occupational and skill profiles (59%), wage rates and benefits (51%), and employer websites (48%).

Figure 34: Which of the following information, tools or services have you used to decide your career path and choose your current industry?

Mention	Percent
Job description information/occupational and skill profiles	59%
Wage rates and benefits	51%
Employer websites	48%
Job/resume banks	39%
Licensing/credential requirements	20%
Availability of workers in the industry	19%
Occupational shortages and surpluses	19%
Employer databases/links	18%
Availability of training institutions for specific occupations	15%
I have never used labour market information, tools or services	15%
Employer recruiting practices	13%
Legal requirements/labour code information	8%
Hiring of special employee groups (e.g. employment equity groups, foreign workers)	6%
Other	4%

Sources Used to Find Relevant Labour Market Information in

The sources respondents used most often to find relevant labour market information were Federal government websites/publications such as business services (42%), provincial government website/publication (39%) and colleagues, which was mentioned by 32% of respondents. Other sources mentioned include job boards, social media websites such as Indeed.

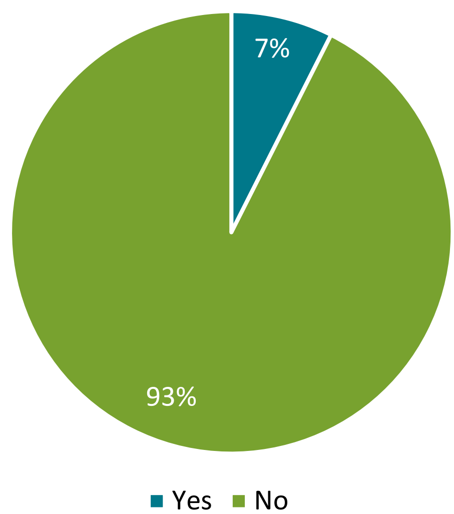
Figure 35: What source(s) do you typically use to find relevant labour market information?

Mention	Percent
Federal government website/publication such as Business Service Centres, JobFutures, HRDC, Industry Canada, Service Cana	42%
Provincial government website/publication	39%
Colleagues	32%
Local employment support organizations	25%
Educational institution	23%
Local business associations	19%
Professional association/union/employee association	14%
Other	7%
Sector Council/Industry association	7%
Private consulting firm	6%

Working with an Employment Service Organization

93% of respondents reported that they were not using an employment services representative.

Figure 36: Are you currently working with an employment service organization to help you conduct your job search?



Assistance Needed to Achieve Full Employment Potential

Respondents in the sample also mentioned the types of assistance that they feel they need to achieve their full employment potential. The majority (60%) of respondents felt they needed more access to opportunities. Other commonly mentioned assistance tools were skills training (36%) career/employment counselling (28%). Respondents who selected the 'other' category mentioned tailored support for individuals with medical disabilities.

Figure 37: What kind of help do you need to achieve the job you want?

Mention	Percent
Access to opportunities	60%
Skills Training	36%
Career/employment counselling	28%
Jobseeker assistance	24%
Retraining programs	24%
None, I don't need any assistance	19%
Access to labour market information	15%
Other	7%

Types of Training That Would Enhance Employability

When asked what types of training respondents would consider enhancing their employability, 'on the job training' was the option selected the most often (55%). A certification (32%) or essential skills (28%) were also commonly mentioned. Post-degree training for job-specific skills was commonly mentioned in the 'other' category.

Figure 38: Which of the following types of training would give you more opportunities?

Mention	Percent
On the job training	55%
Certification	32%
Essential Skills	28%
College Diploma	25%
University Degree	22%
Apprenticeship	19%
Professional Designation	19%
None, I don't need any additional training	15%
Other	6%

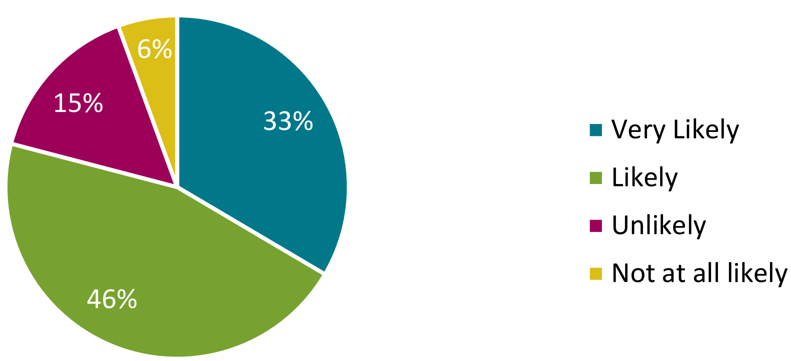
Additional Information Needed to Be Successful in Your Job Search

When respondents were asked what, if any additional information they needed to be successful in their job search, they responded with information on effective networking, education needs and how employers measure candidates when selecting for a role.

Implications of COVID-19

When asked how likely they would consider employment in occupations that they may not have considered in the past, 79% of respondents mentioned they are very likely or likely to make this consideration. On the other hand, 21% stated unlikely or not at all likely.

Figure 39: When you consider employment opportunities post COVID-19, how likely are you to consider employment in occupations that you may not have considered in the past?



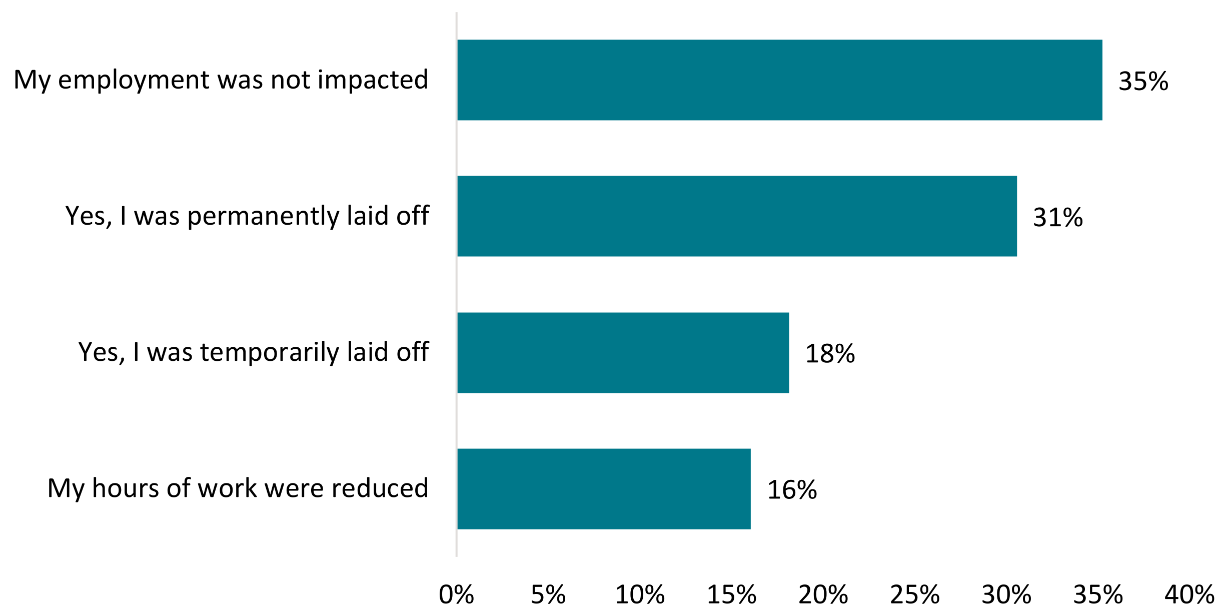
When asked which sectors have seen an increase in job postings, respondent's food services (50%), health care (31%) and agriculture (17%) were most often mentioned. It is noteworthy that these sectors are all related to the impact of COVID-19 on the local economy. On the other hand, 25% of respondents mentioned no sectors had increased postings. Deliver drivers and construction where sectors mentioned under the other category.

Figure 40: In which of the following sectors have you seen an increase in job postings?

Mention	Percent
Food Services (grocery stores, restaurants, warehouse/distributors, etc.)	50%
Health care	31%
No sectors have increased postings	25%
Agriculture	17%
Manufacturing	11%
IT and Technology	8%
Other	8%

When asked if COVID-19 impacted their employment, 35% of respondents mentioned their employment was not impacted. On the other hand, 49% of respondents are temporarily or permanently laid off, and 16% have had their hours reduced.

Figure 41: Was your employment impacted by COVID 19?



Background Demographic Information

Figure 42 Please tell us a little about yourself. How old are you?

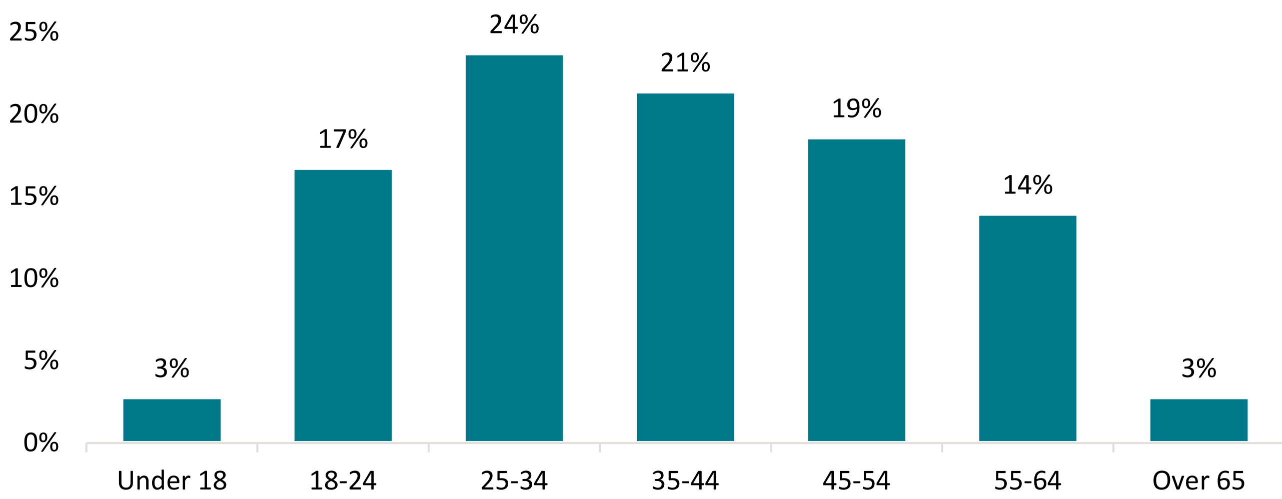


Figure 43: What is the highest level of educational attainment you have?

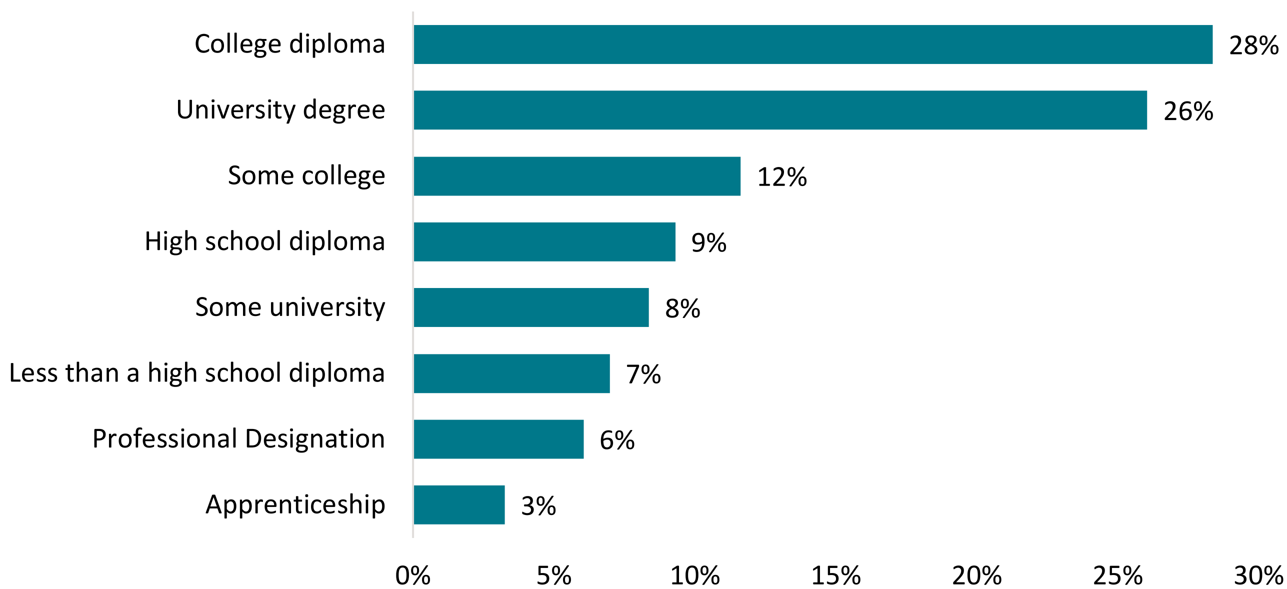
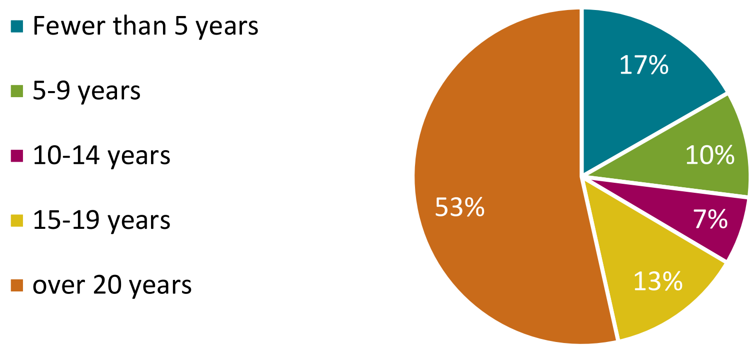


Figure 44: How long have you lived in the Southwest Alberta region?



Southwest Alberta Skills Study

Presented by: Trudy Parsons, Jordan Tidey, MDB Insight

Date: July 10, 2020

SOUTHGROW
REGIONAL ECONOMIC DEVELOPMENT
GROWTH•INNOVATION•PROSPERITY

Lethbridge College

Economic Development Lethbridge

Community Futures Alberta Southwest

Vulcan County
ECONOMIC DEVELOPMENT

ALBERTA SOUTHWEST
REGIONAL ALLIANCE

Taber Economic Development

Funded by:

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Alberta

Session Overview

The Industry roundtable sessions were hosted as part of the engagement activities of the Southwest Alberta Skills Study. The focus of the Roundtables was:

- Engage in a more in-depth conversation that allows for exploration of findings from the business survey, gathering insight into the "what is happening."
- Understand the challenges facing Educators locally
- Explore approaches being utilized to respond to challenges
- Test the labour market profile with "on the ground" experience.

The study will offer tangible solutions to local challenges related to skills needs in the labour market, ensuring that our resources are being best allocated and that efforts are coordinated for maximum results.

The sessions were held virtually on May 28th , June 10th and June 18th, 2020

Session Themes

- Top Workforce Challenges Employers are Facing:
  - Soft Skills
  - Wages (High Expectations)
  - Attracting Workforce to the region
  - Continuous learning access and support
  - Recruitment
  - Transition Training
- Most employers source all their employees from the local region with a few agricultural firms using the temporary foreign worker program
- The ratio of new grads to retirees is concerning to several businesses particularly in the trucking industry
- Accessing Training remotely in a cost and time effective manner is a concern
- Attracting workforce to the region is difficult, lack of awareness of the area and what it has to offer in both lifestyle and work opportunities
- Micro credentialing, including a system of recognition of soft skills was an area of interest for the employers

Session Themes

Positions Employers are having difficulty finding workforce to fill locally							
Sheet metal mechanics	Engineers	Technologists	Production Staff (Technology Ready)	Management	LEAN Trained	Mechanical Millwrights	Qualified truckers

Skills Gaps Employers are facing					
Leadership	Communication	Continuous Learning mindset	Divers Licenses	Soft Skills	Digital Literacy (HTML)

Session Themes

- Lack of awareness of all the programming and supports that exist in the region
- A clear desire to collaborate more closely with Secondary and Post Secondary institutions to improve student awareness of local opportunities, career pathways and experiential learning
- A desire to make the process of connecting with students easier and less labour intensive
- Employers would like to see KPI’s relating to post secondary outcomes, placements and retention in the region
- Employers are also interested in collaborating on training to make it more accessible locally at lower cost particularly in LEAN Manufacturing
- Fort MacLeod businesses reported success in attracting and retaining workers from the Philippines, helping to develop a local community that supports newcomers
- Employers suggested making co-ops mandatory

Roundtable Questions

1. Over the next five years, what do you anticipate to be your number 1 challenge with respect to demand and supply of skilled and professional talent?

- Workforce needs to understand that careers will include continuous training
- Attracting workforce to the region is difficult, lack of awareness of the area and what it has to offer in both lifestyle and work opportunities
- Training and upskilling, is a responsibility of employers, but there needs to be a trade off between the two
- Specific Jobs:
  - Sheet metal mechanics
  - Engineers
  - Technologists
  - Production Staff (Technology Ready)
  - Management
  - LEAN Trained
  - Mechanical Millwrights
  - Qualified truckers
- Specific Skills Gaps
  - Leadership
  - Communication
  - Continuous Learning mindset
  - Divers Licenses
  - Soft Skills
  - Digital Literacy
  - Technology Ready for the Food Industry

1. Over the next five years, what do you anticipate to be your number 1 challenge with respect to demand and supply of skilled and professional talent?

- Reskilling and upskilling are challenges industry could do a better job on accessing external training: onus is placed on the individual to develop their own skills, but training costs are high
- Disconnect between education and skills many soft skills need to be gained through experience, new grads are not able to preform at higher levels right away and have high pay expectations
- Number of people retiring in the trades vs. new grads
- Apprenticeship, hands on learning shows what you are going to do in the job, not always an option in diploma or graduate programs there is a disconnect with real life experience, management training should have a real world experience, how do we get people out, they are disappointing each other on supply and demand.
- Businesses need to understand the supports that are available
- The competitive wage rate, we have to pay a premium, for pulling people into the community, some are not willing to travel, its our ability to provide continual training, (first aid, fork lift, soft skills, computer training, leadership opportunities are key)

1. Over the next five years, what do you anticipate to be your number 1 challenge with respect to demand and supply of skilled and professional talent?

- Access to courses that provide the training we need, there are grants, employees and employer deciding a common ground on training, finding those opportunities is the challenge
- Local training available not a fitting it into operations, time of year can be a bigger factor, seems to be a trend to move to asynchronous training platform, working around the schedule, Can be self paced or blended online and onsite or face to face options,
- Holes in training, starting younger, education is not always the classroom, the students don't have the soft skills when they come out, they need to be into more of these things, in trades, hand eye co-ordination skills are not being taught the same way in high school
- Improved access to LMI, surprised new grads are surprised they realize where they have invested in their education is not who and where they are, they take that and transition, understand at an earlier age, with hands on, what jobs are out there, what the opportunities are there
- Digital literacy, need to keep up as technology requirements of the business are changing
- Continuous learning, build the future workforce, use immigrants to fill in gaps, take the existing workforce and help them transition, continue to skill up


Top Challenges
Mentimeter
1st
Soft Skills
2nd
Wages
3rd
Attracting workforce to the region
4th
Transition Training
5th
Timing of training, fitting it in
6th
Continuous learning access and support
7th
Lack of experience
8th
digital literacy
9th
Incomplete Training
9


Top Challenges
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5th
digital literacy
6th
Lack of experience
7th
Timing of training, fitting it in
8th
Soft Skills
9th
Wages
10th
Incomplete Training
8

2. When recruiting new talent to your business from outside of the area, what is your primary market?

- Most businesses are sourcing most of their employees locally “Most of the talent is in the area, unless it is very specific to an industry”
- Specific skill and management are being sourced from outside the region
  - Most commonly Calgary but across Canada and Europe were mentioned
- Lack of local talent has slowed business growth
- The Rural Immigration program in Taber and Claresholm has seen success “We’ve approved 3 immigrants, gives us control over applications, get them to commit, eliminates those who are looking for a larger center”
- Post secondary education, clearly a disconnect with understanding what the real costs are to everyone with making bad decisions, education in programming need a dating app for jobs, preferences and how to connect in a better way, not understanding the expense,
- University Agriculture Program Students from Quebec do internships locally they get resume experience and references,
- Companies hire programmers from everywhere, they are not afraid, the hard goods industries require staff, the industry will dictate
- Depends on the type of Labour, professionals go to larger centers, general Labour smaller centers, (Calgary to Lethbridge can be easier if they are looking to move/lifestyle change)
- Limited knowledge of southern Alberta, lower wage area compare to other areas in the province, when people are looking for a specific lifestyle, people leave if it isn’t the right fit, some leave as quickly at they arrive, the person who is looking for this type of lifestyle

3. Are you aware of an employer-led collaborative working on the development of a talent pipeline for your sector?

- Informal group of HR people that meet every few months to share ideas in the food industry, "Struggle to keep people, high turnover, not a bad thing to meet every so often to talk"
- Worked with several, skills trade committee group, local group, working with career transitions and epic trade shows, problem is rooted at the high school level lost the ability to do job shadowing, experiential learning, get back to work experience, when they find something they like early they are more likely to pursue it
- Shop class was standard, some people come out but do not know how to use tools or fundamentals, work with things, lose the ability, virtual and online,
- COVID Concern for hands on lab driven learning, bias teachers came through academia, can be over promoted
- Teachers not aware/biased
- Last year/year and a half, trying to get momentum, provide experience and opportunity, will take good candidates try things out,
- Working one on one less efficient, administrative issues, HR, Resume sorting, process could be easier,
- Management training, co-op from college and university can be invaluable in terms of training
- Education Employer collaboration or partnership with equipment donated? Ag Technology degree program, high tech farm, equipment

3. Are you aware of an employer-led collaborative working on the development of a talent pipeline for your sector?

- Manufacturing (lean) interested in brining kids in person and virtual VR tools, factory tours, went to Japan and elementary kids were on tours, stumbling block in order to get funding, tight timelines,
- Integrated supply chain local employers, career and employment preparedness, (micro credential) deliberate not overlap or duplicate other programming
- Hired a teacher, collaborated, brought students into our business on rotation, 10 students applied and went through all departments, not just heavy duty technicians, software, accounting working with local businesses to educate the students in collaborating with the college, district 51, get students to do more stuff, try more things, realize they have an opportunity if they are given the chance to try
- We've had 7 RAP, registered apprenticeship programming, shadow programming, try different things, tech, sales, broad spectrum
- Chamber developed junior chamber program was going well until COVID, they apply and let us know what they want to do, they get connected with a position to help them develop skills, certificates and letters for resume and scholarships
- Vulcan County, partnered with SouthGrow and SAAEP, partnered to develop the skills pipeline into renewable energy, job task seminar, free to those who are registering, have a capacity of 300 almost full, reached out to Lethbridge college, large employers, Greengate, objective is to educate on the jobs, training and how to integrate skills set and develop a training workshop, identify how we can create and retain jobs based on those large projects

3b. What would an ideal collaborative look like to you?

- Awareness of needs LMI, database with access “This requires an agency to lead it and foster the collaboration and connections”
- Reduce Administrative burden working with councilors, make it easy
- Culinary Advisory board, collaborates with teachers and reps, excellent opportunity for the stakeholders to meet, discuss skills and curriculum, not sure if it exists in other program areas
- Education, discussing with employers about the skill levels required to make students employable, match the skill level to the employer, aiding training,
- Students don’t know what is in the community, new techs the VR, put kids into the skills, to expose them to working with hands, reducing liability, recently available
- College has a VR, AR program, looking to lead the way, Maintain automated machinery is expensive, the tech is getting future, AR is the future
- Not sure it helps at the university or college as some trades we need are not offered there,
- Better success dealing with career councilors through skills and RAP placements
- Very few co-ops, make it mandatory, identifying different types of industries, meets the needs of employers and employees it is limited, why not other industries,
- Job creation, limited co-ops need to be more inclusive, just the top students filling those positions, other job creators don’t necessarily fit that mold,
- Issues with assessment of expertise, willing to put the effort in, look at resume people getting culled out due to GPA

4. How might immigration and/or interprovincial migration provide a solution for overcoming a shortage of talent in Southwest Alberta?

- Claresholm, settlement site for immigrants, large number of international applications/interest
- We are seasonal at Lantic, we rely on out of province, northern Saskatchewan
- VRP We use a lot of immigration, due to labour shortage, using recruitment firm, long time employees from Mexico referring people, lots of people in with the skills set, referral payments, immigration consultant to hire Ukrainians, Russians and South Africans,
- Perspective on shorter term impact of COVID on the labour force availability?
  - More people available for work, some businesses are closed for good
  - Permanent and seasonal 6-month employees
  - CERB causing staff to not want to go to work, design issues, earnings reduce incentive, no regional sensitivity

4. How might immigration and/or interprovincial migration provide a solution for overcoming a shortage of talent in Southwest Alberta?

- Helped two eastern European families, went to smaller communities and then moved to Calgary, immigration Canada MTV (Montreal, Toronto, Vancouver) doesn't matter where they come from they like larger cities, immigrant came through the trucking program, feedback that the experience was not as ideal as possible
- Reality is, if we are not tracking turnover, you are missing the boat, trying to understand why, exit interviews, 200% not uncommon, in the skilling and upskilling area what are we tracking at the constituent and business level,
- Support for employers, understand key indicators and how to track, HR support, in smaller businesses
- Improved LMI tracking success rates, reason why there is turnover, accountability for the students, understand how their actions affect the economy, from an ROI perspective
- Barriers, access candidates from afar and relocating, unless they can be on site to be able to demonstrate skills, adds risk, ways to mitigate risks,
- Trips to the Philippines to recruit, is meeting their needs, large growing population in Fort Mcleod,
- Micro credentialing develop a system of recognized with the employees, level of competency based on those skills, can access programming on soft skills, when they are backed by institutions, transitioning to being able to offer recognized credentials,

5. How can businesses be supported in the development of the next wave of skilled talent?

- People used to be transient, economic challenges have impacted the ability to change jobs, staying does not mean they are engaged, want to stay but be challenged and develop skills, how do we help employers to provide new opportunities for their employees to develop new skills, subscription skills for upskilling,
- Track KPIs and develop methods to address these challenges, focus on working with employers that understand their industry,
- We've collaborated with Lethbridge College, our employers are not knowledgeable about what goes on at the college and what it can offer,
- Sector representatives and college, at the school district level? More at the post secondary level, our school divisions don't have the funds or expertise,
- Culinary advisory board, high school programming not a lot of success, kids at that age have no idea, 10% that know 90% don't, two-week placements, find a way to make it engaging, at the post secondary level
- Companies have been pushing for Lean training in each others' facilities
- Micro-credentialing, college initiative, Collaborative Centre of Excellence, some have foundational skills and just need an upskill, not a full credential
- Working with Southern Alberta Truck Group, they are retiring faster then they can replace them, technology and lack of access makes it more difficult to recruit, challenge, costs and insurance challenges, can't insure new drivers unless you are underwriting yourself

5. How can businesses be supported in the development of the next wave of skilled talent?

- Continuous improvement, advisory programs exist for number of programs, sometimes they lag and need to be updated, there should be more, have them more tightly tied to where their students go the college is leading the university in the advisory committee space
- Support system in Southern Alberta is important, lifeline, facing difficulties, many programs will suffer in the wake of COVID, where spending decisions will be made in the future,
- Career transitions supported by five school districts, is an efficient mechanism for coordination, connections and support is important, asset to our business and the community, the reality of rebuilding would cost a lot, reduce hiring,
- Similar techniques used for mature workers and with new graduates, students, critical for workers and employers, help prepare to what employers need, career development is less invested and hurts our workforce, correlated disconnect from the workforce, 30th anniversary, we average 83% employment 3 months after the program working, Career Transitions name of program Judy
- Having conversations with students and teachers, aware of other skills paths and options beyond university,
- Taber LGM community, leave by 9th grade to begin working, involve them in education options, help them stay in school, not fall through the cracks, they have skills, we are losing them as skilled workers, taking up minimum wage jobs, a lot more focus, recruiting them to stay in school
- Distance from faculties/facilities is an issue, loss of productivity, onsite training is a benefit, VR or physically come to the facility
- Programs with the Excellence in Manufacturing, management training, 8 week program but is only 4 hours a week, pulled 12 people off the floor, the outcome is they are given a problem to solve, inexpensive

MDB INSIGHT

Southwest Alberta Immigration Sessions Summary

Presented by: Trudy Parsons, MDB Insight

Date: June 1st, 2020

SOUTHGROW
REGIONAL ECONOMIC DEVELOPMENT
GROWTH • INNOVATION • PROSPERITY

Lethbridge College

Economic Development Lethbridge

Community Futures Alberta Southwest

Vulcan County
ECONOMIC DEVELOPMENT

ALBERTA SOUTHWEST
REGIONAL ALLIANCE

Taber Economic Development

Funded by:

Canada

Alberta

Session Overview

Two Immigration focused sessions were hosted as part of the engagement activities of the Southwest Alberta Skills Study.

The study will offer tangible solutions to local challenges related to skills needs in the labour market, ensuring that our resources are being best allocated and that efforts are coordinated for maximum results.

These sessions were held virtually on May 12th focused on service providers and May 26th focused on immigrants to Southwest Alberta.

Session Themes Support Providers

- The service providers agree there are significant barriers to attracting and retaining immigrants in the Southwest Alberta Region
- There are a wide variety of services available to support both businesses and immigrants but there have been disconnects in both awareness and access
- There is a desire to collaborate and engage with additional partners to improve services and access

Session Themes Immigrants

- Newcomers are facing barriers in getting jobs and integrating into Southwest Alberta
  - ESL, getting the first job and recognized Canadian experience or references and recognition of skills as compared to credentials
- Supports Requested include: Improved access to existing services, transition programming, career bridging, job shadowing and resume writing
- Participants would like to encourage employers to be more open to hiring immigrants and have more inclusive corporate cultures
- Continue to promote and make information more accessible to the immigrant community

Roundtable Questions Support Services

What is your interaction with immigrants to Canada? To Southwest Alberta?

- Social media is being used by employers to attract immigrants
- Southern Alberta is rarely identified as a region of choice, with Montreal, Toronto, Vancouver seen as better prospects with support networks and opportunities.
- Some groups have been successful attracting workforce through promoting, QOL and Cost of Living in the region.
- Many immigrants are highly skilled but cannot land or stay in positions, ESL but also barriers in the application phase including soft skills, teamwork and adapting to the corporate culture.
- Employers are better at credential assessments but bad at assessing foreign experience.
- Claresholm is seeing major interest: in 6 weeks 10K applications, the challenge is assessing fit, intention to reside, community connection.
- One existing community is seeing success specifically in food processing with Filipino candidates.
- Some are arriving at support services frustrated and may have burnt bridges at sooner we can connect with them the better, avoid burnout

The most mentioned barriers to hiring immigrants in the survey were Language / ESL and Concerns that qualifications/professional designations don't meet the Canadian standard. Do these concerns align with your experiences?

- There are sometimes ESL issues even with Economic Immigrants who need to pass an English exam. There can be frustration in understanding one another at the workplace, often due to the specific vocabulary used within the industry.
- A Toolkit has been developed for downtown businesses to help develop a sense of community
- There are cultural barriers and stigmas that exist within our community that affect Newcomers. We really can't dance around this reality.
- Connections to our local industry associations will be helpful to understand the key industry language and as facilitators E.g. Construction Assoc., Industrial Assoc., Builders Assoc.
- Understanding of the ESL guidelines, not trade specific, what do the levels mean, simplify language, guidelines exist languages Canada, disconnect between language providers, advocate for the student, Translate to employer speak, simplify, clarify,
- Micro credentialing for languages, big in UK,
- people can obviously be involved with the LIP, there is also the Lethbridge Diversity and Inclusion Alliance which the City supports financially - Victor mentioned that he is one of the Co-Chairs. That group is open to anyone interested in building a welcoming and inclusive community.
- The City is also going to be hosting an Inclusive Hiring Conference in October
- The City also will be looking to diverse populations to review our hiring practices to identify barriers.

What needs to change to allow greater support for immigrant integration into the workplace in Southwest Alberta?

- Businesses preferred methods to obtain support and information: Sharing of best practices, ESL Providers, Workshops, Mentorship from other employers
- Common language, clarity,
- Awareness of resources, access before they arrive, simplify access, LIPs?
- Perception the services were not available to them for example the Lethbridge Family Services, website to put it all together, is being used, 50 partners, 15 sectors, 25 organizations to use the website,
- Creating a more welcoming and inclusive community for all who call Lethbridge home. Resources for newcomers, employers, service providers and the community.
- lethbridgeimmigration.ca

How might Southwest Alberta present itself as a welcoming community?

- During the recruiting process focus on markets with local synergies and similar lifestyles for example areas of Brazil have similar crops and individuals who would like to immigrate
- Examine synergies and target recruitment in those areas
- The most successful recruitment occurs when there are connections to the region, look at culture, community characteristics and structure outreach.
- Promoting access to restaurants, foods from home countries, reflect the culture of immigrants, make sure they have access to essential products and services.
- Support the community’s adaptation to the new population.

What role can your organization play in achieving that vision?

- Work on developing an advisory committee that includes the School, hospital, NFP, Chamber to improve inclusiveness
- Develop a welcoming committee that facilitates making 1 on 1 connections this is currently in use in High River and Strathmore
- Settlement services and Economic Development should provide a facilitation and partnership role with the LIP
- There is an identified the need for a Labor Market Partnership and more data.
- Work with Recovery Task Forces
- Develop community retention strategies
- Help align seekers with jobs and part of workforce and resident recruitment strategies
- Combat the perception of immigrants taking jobs which is already starting to resurface.

Roundtable Questions Immigrants

Generally, what has been your experience in your job search in Southwest Alberta? (positive, negative, secured employment in my field, etc.)?

- Opportunities, employer did not give the chance to show skills. Barriers for new immigrants as they can't provide local references.
- Language was a barrier with some of the opportunities pursued.
- Came into the country with strong skills and references. Volunteer with immigrant services and the red cross and built networks that help her to land a job. Challenging for new immigrant to find the balance on the skills they bring from their home country and the local employers are looking for.
- Experience play a very important role. Having the references was also difficult, specially for jobs in finance and banking. It is easier to get a job in Lethbridge compared to bigger cities such as Calgary. Volunteering to show skills. Sponsored by the Federal Government to enhance skills.
- Employers do not give the opportunity due to the lack of local references.

What barriers have prevented you from securing employment in your field or in a position that utilizes your skills, knowledge, credentials? (education, source country, lack of Canadian experience, etc.)

- Recognition of language
- Recognized Canadian experience or references
- Recognition of skills as compared to credentials
- Cultural background

What additional supports would benefit you in your job search?

- Transition programs, the government should create a platform to get Canadian Experience. E.g. banking
    - Career Bridging Program
- Provide opportunities to allow newcomers to get Canadian Experience through job shadowing
- Transportation (to secure the job and get to work)
- Awareness of living conditions in Southwest Alberta (what does life looks like?, e.g. weather)
- Resume writing. How do people demonstrate the transferability of skills?
- There are systems in place for certain type of immigrants, but these do not cover all newcomers
- Training Inc.

What needs to change to allow greater support for immigrant integration into the workplace in Southwest Alberta?

- Educating employers is equally important. Creating a platform to discuss about the culture, backgrounds, etc.
- Value the international experience immigrants bring to the local economy
- Show more diversity in big corporations and government, as they can give example to other employers
- Educating employers on the immigrant population that have chosen Southwest Alberta as their home (share key learnings that employers should know about immigrant communities that reside in the area, e.g. language)
- NYSC - National Youth Service Corps (Nigeria): intern and work for a period of time to integrate people into the workforce

If you had the opportunity to speak directly to employers about hiring immigrants, what would your message be?

- Be open minded
- Give people the chance, trust them
- Stereotypes
- Be inclusive and diversified
- Be patience
- Take intelligence risk

How might Southwest Alberta present itself as a welcoming community?

- Improve communication – help people find their way in the community (e.g. affordable housing, transportation, groceries, how to find a job)
  – Having the resources to provide these services
  – Use social media platforms to facilitate reach out
  – Connect people with groups they identify/relate with
- www.lethbridgeimmigration.com (website has all basic information for newcomers) – accessible for mobile devices (phones).

MDB INSIGHT

Education Roundtable Presentation Summary

Presented by: Trudy Parsons, Jordan Tidey, MDB Insight

Date: June 3, 2020

SOUTHGROW
REGIONAL ECONOMIC DEVELOPMENT
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Lethbridge College

Economic Development Lethbridge

Community Futures Alberta Southwest

Vulcan County
ECONOMIC DEVELOPMENT

ALBERTA SOUTHWEST
REGIONAL ALLIANCE

Taber Economic Development

Funded by:

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Alberta

Session Overview

The Educator roundtable sessions was hosted as part of the engagement activities of the Southwest Alberta Skills Study. The focus of the Roundtable was:

- Engage in a more in-depth conversation that allows for exploration of findings from the business survey, gathering insight into the "what is happening."
- Understand the challenges facing Educators locally
- Explore approaches being utilized to respond to challenges
- Test the labour market profile with "on the ground" experience.

The study will offer tangible solutions to local challenges related to skills needs in the labour market, ensuring that our resources are being best allocated and that efforts are coordinated for maximum results.

This session was held virtually on June 3rd

Session Themes

- COVID-19 is creating a great deal of uncertainty, creating high unemployment and shifting the skills required by employers
- Improving accessibility to training through micro credentialing and encouraging employers to invest in training is a major focus
- There is broad consensus that youth need to have more opportunities for experiential learning, including tours, co-ops and internships
- Participants agreed that new graduates are having difficulty articulating soft skills and experience when they apply for their first job, making it more difficult for them to find employment
- According to educators the top challenges facing employers are:
  - Soft Skills, Disconnect between employers and job seekers, COVID Uncertainty and Difficulty clarifying soft skills and experience

Session Themes

- The top challenges the education sector is facing are:
  - Funding, New program competencies in skills areas, Employers not funding professional development
- There is a consensus that due to lack of funding and the need to be more effective, education institutions will need to work together with industry to:
  - Develop and access LMI including alumni tracking
  - Provide more up to date, flexible and online programming
  - Connect Students to jobs by making them aware of the opportunities
  - Improve Experiential Learning
- There is a consensus that a wide variety of excellent programs are available but not always easy to access or do not have broad awareness, highlighting the need for improved LMI and coordination

Roundtable Questions

1. Share your general perspectives on the labour market in Southwest Alberta.

- COVID-19 is creating a great deal of uncertainty, creating high unemployment and shifting the skills required by employers
- Prior to COVID there were identified skilled labour shortages in Medicine Hat, the region had a hard year economically with, rising unemployment related to the oil and gas sector and new industries like Cannabis are also in downturn
- The group has not yet seen a large number of energy workers trying to retrain/reskill due to the downturn
- There are 400 newcomers from 34 countries in the Taber area, but they face barriers in literacy, drivers' licenses, Canadian certifications or equivalency
- There are 22 businesses run by the Mennonite community locally, they are significant players in the economy
- There is a desire to connect youth to business and industry, let them know things will move forward, climate of positivity, there will be opportunities, connect them to the university and businesses, post secondary and business support those connections, have some confidence in our youth, and businesses that they will reimagine the market, critical thinking, skills, innovation centered beyond preparing for a market, but learners and thinkers who can respond to change,
- Fear exists right now, youth are facing challenges, CYPC webinar, lesser uptake at post secondary possibly,
- Youth out of post secondary, employers are looking for experience, seems to be difficult to find jobs, without the first job its challenging,
- Some businesses will not be reopening, in some areas a saturated market with new entrants
- Seeing some applications decrease, greater focus on work integrated learning, employers hire at a subsidized cost and create the opportunity for increased employment

www.menti.com and use the code 22 20 15

1. Share your general perspectives on the labour market in Southwest Alberta.

Mentimeter

There tends to be cutbacks in the labour market due to COVID. It tends to be in a holding pattern as the future is unknown.

We're lucky that one of our key industries is agriculture, which somewhat insulates us, but we will eventually be impacted by provincial economic challenges. If the provincial budget weakens, we need a strong labour mkt to absorb public sector job lo

There is a lot of uncertainty in the current market. With COVID what jobs will be available to our community members. Will those that are completing their education still be prepared for jobs because of forced changes in all levels of education

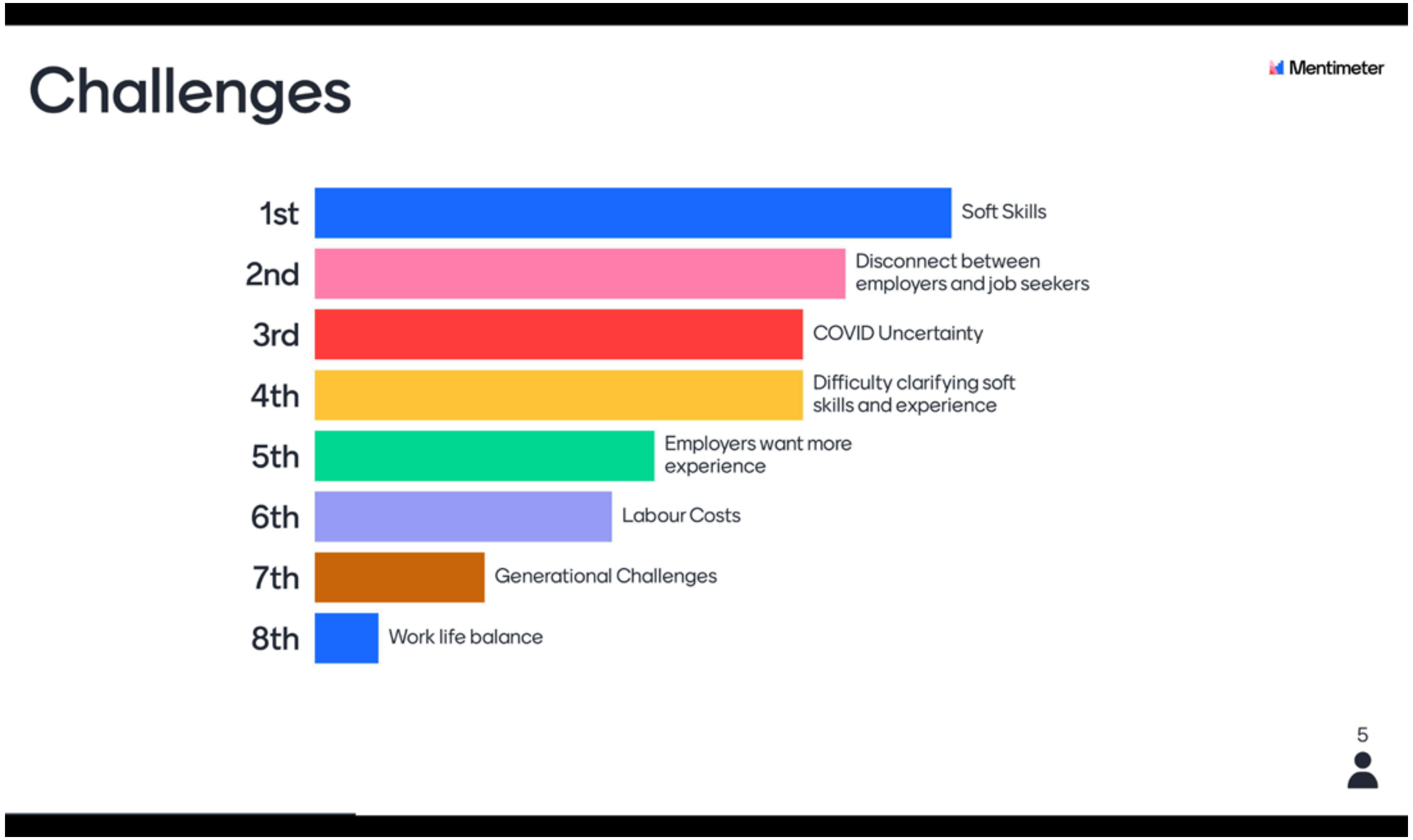
Even before Covid, we've worked to retain more of our post secondary graduates. There is often a bleed of our most valuable resources.

4

2. What do you perceive as the biggest workforce issues/challenges that employers face in Southwest Alberta?

- COVID/Uncertainty
- Employers looking for more experience/less willing to train
- We hear the soft skills are the ones that are most important, general understanding with the colleges and university the technical competency will be there, but soft skills are hard to teach, technical easier, employers want employees that come to them with soft skills,
- Students are having difficulty articulate their softskills, supporting students in expressing soft skills is a critical issue
- Ways to validate soft skills, more structure to articulate, get badges with assessment
- Students in school are having difficulty translating post secondary as experience, field trips, work integrated learning, volunteers, not making that connection, not sure how to make themselves stand out
- New generation that wants flexibility and to be on social media during the workday, work ethic differences, some do not want overtime, different challenges with youth,
- Validate the ability and competency, have a way to showcase what they can do in the workplace

2. What do you perceive as the biggest workforce issues/challenges that employers face in Southwest Alberta?



2a. What action is being taken to address these challenges and who is leading the action?

- Employers expect 4-year degree grads to have certain competencies, there needs to be a shared set of courses regardless of program, to ensure a baseline of soft skills
- On that point, we started liberal education program, early start experience course, grade 12 get a leg up on university, huge response, bookending with another course early career start, end of degree help them meet with employers, resume building, volunteer Lethbridge,
- Students work enormous hours in different industries, find the fit they would like, they often get hired, we don't require students to take them, a lot of them are taking them, we are adding sections, commitment to articulate the career they want, yes they are three credit courses, developed more minors, piloted last year, there is demand,
- First years that have applied we send them the recommendation, strong partnership with the Blackfoot Confederacy, partnership on dual credits, programs with dual credits,
- Partnering with University of Lethbridge on dual credits for five years, beneficial, expands thinking, critical thinking mindset, explore and think bigger, expanded to envirotech, engineering, liberal education thinking at the 1,000 and 2,000 level, looking for efficiencies, fill classes
- We have initiatives with off campus coordinators, very productive, challenges opportunities in rural education look different, accessing them has been difficult, issues accessing, partnership between groups has been effective,
- Two days fully online in spring and will be online in fall

3. What are the most significant issues/challenges that the education sector is facing in Southwest Alberta?

- Shift to online learning creating challenges
- Budget cutbacks,
- Post secondaries are major employers facing job losses
- Professional development, employers do not fund, relying on the individuals themselves, if they are not willing to fund it can hold people back,
- Move to at home learning, working with staff to build their capacity, technology and skills development, looks different for engaging students k-12, they won't sit, engage in more interactive ways, engagement of learners, there will be a growing gap if students do not have support at home or access to technology
- At the college number of students with no access to technology, have to keep commons open to support, may increase with out of work individuals
- Programming aligned with labour market needs, hard to find funding to develop new programming and access to LMI
- Program approval based on old data, 3-5 years to get a cohort through, hard to be responsive, in the past it was easier to get programs approved
- Programs could be developed if championed by strong voices, need for those organizations and skills, was there enough demand to support a full program
- Recognizing some skill sets are not needed every year and are cyclical
- Collaborative centre of excellence, educational opportunities for specific skills, to make it faster and cheaper, continuing studies more agile, that signaling that non-credit courses does not convey the same impression,
- Some of the gaps, does it have the rigor and how we access that
- Jobs aren't high paying enough, people come out of school with high expectations, they want to jump into positions, challenge employers are dealing, with not high paying in the area, managing expectations

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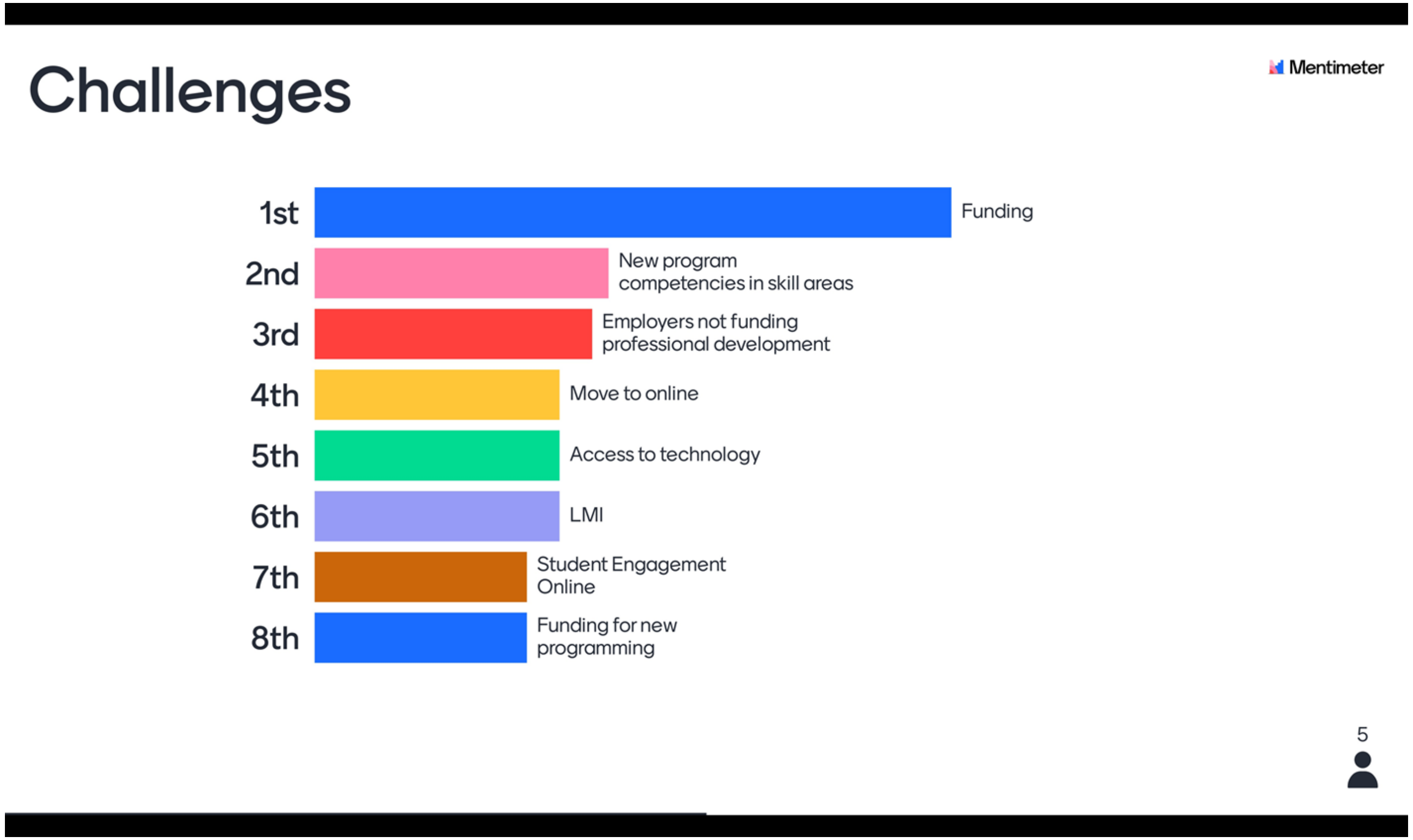
3. What are the most significant issues/challenges that the education sector is facing in Southwest Alberta?



3a. What action is being taken to address these challenges and who is leading the action?

- Experience based learning with employers
- Funding, hoping to adapt with collaborations with other institutions, share the financial burdens, collaboration is our biggest friend
- Collaboration agreements signed,
- Solution is collaboration, adult learning courses with other groups and move some courses online,
- Work integrated learning is built into the 10-year plan, build competency into programming, make sure they have that
- Indigenous collaboration and support to help students transition to the new institutions, very important for us, visible minority groups have access to employment opportunities, educational

4. How might the education and training sector further support development of the local talent pipeline?

- Online learning, school systems, use it as a channel, for skills development, continue to be developed
- Interesting to see the k-12, will it enhance skills moving to post secondary, focus on the gap and the transition,
- Need more opportunity to get educators working with businesses, communication and understanding what is out there and what skills are needed,
- Industry sessions will be held with opportunity for others to join
- Connection with industry with the advisory councils, meetings semi annually, shared communication

4a. What is needed to best position these institutions to achieve this goal?

- Access to LMI
- Flexibility on funding
- Collaboration
- Advanced education, pilot program, work with the post secondaries (Reach out to Jane)
- Rural perspective, connection to employers, support us in our programs, budget will be a challenge, efficiencies, shared costs
- Network, be plugged in, work towards a shared vision, measurable outcomes, how successful have we been suggestions for outcomes
- Opportunity for post secondary and school divisions, how the students are doing, alumni tracking, impacts,
- Educator opportunity to gather collectively to engage in these types of discussions
- We do have people responsible, off campus coordinators, they do meet, Zone six will meet and discuss dual credit, could be expanded, different groups come together at different times,

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What two key priorities would you include to strengthen the success of talent retention, and readiness?

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1. opportunities for those who don't need a full credential to reskill and upskill2. close collaboration between post-secondaries and the school divisions

Improved collaboration with employers.

ongoing professional developmentclarity in role expectations and skills required

I love the focus on integrated learning and enhancing coop programs. 1. Continue to tie job creation and placements to funding for businesses as revert continues. 2. Educate the businesses about the talent pool and PSIs as partners for workforce.

1) Employers need to provide management development for their staff in order for potential supervisors to better manage new employees. The education sector could help with this retraining.2) Industry to focus on employee evalns to ensure proper mgt

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