# Southwest Alberta Regional Skills Study

## Regional Report: SouthGrow

September 2020

SouthGrow Regional Initiative

MDB INSIGHT

# 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.

We would also like to thank the Southwest Alberta Regional Skills Study Partnership members that guided this project, composed of representatives from; SouthGrow Regional Economic Development, Lethbridge College, Economic Development Lethbridge, Community Futures Alberta Southwest, Vulcan County, Alberta Southwest Regional Alliance and Taber Economic Development.

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# Glossary of Terms

**AI:** Artificial Intelligence

**Apprenticeship:** This form of training results in a skilled certification qualification, generally acquired through a combination of in-class and on-the-job learning.

**Co-op:** A Cooperative program (Co-op) combines classroom education with practical, structured work experience. It differs from the apprenticeship as it is usually facilitated through an educational institution.

**Economic Development Officer:** An employee that is responsible for planning, developing, coordinating, and implementing economic development policies, strategies, and initiatives that improve a community or region's economy.

**Employability Skills:** Skills needed to enter, stay, and progress in the world of work. Examples of Employability Skills include essential skills such as communication, personal management skills, and teamwork skills.

**ESDC:** Employment and Skills Development Canada

**Internships:** Internships are usually completed as part of the coursework, and students receive credit towards final program completion. They can be full time or part-time and can be paid or unpaid

**LMI:** Labour Market Information is intelligence that helps inform about the current job market in a geographic region, province, or nationally. It informs decisions by sharing information about jobs, companies, industries/sectors, wages, etc.

**Micro-credentials**: A single, shareable endorsement or attestation of a learner's achievement of specific knowledge, skills or even competencies. Some micro-credentials utilize a badge system.

**NAICS:** The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments to collect, analyze, and publish statistical data related to the economy.

**NOC:** The National Occupational Classification (NOC) system is a federal statistical standard used by federal agencies to classify workers into occupational categories to collect, calculate, or disseminate data.

**SME**: Small and Medium-Sized Enterprises

**Study Area:** For this study, the Southwest Alberta region (Study Area) is defined as the area spanning east of the BC border, south of Calgary, and west of Brooks.

**Transferrable Skills:** Transferable skills are any skills you possess that are useful to employers across various jobs and industries. These might include skills like adaptability, organization, teamwork, or other qualities employers seek in strong candidates.

**Soft skills:** The Collins English Dictionary defines soft skills as "desirable qualities for certain forms of employment that do not depend on acquired knowledge: they include common sense, the ability to deal with people, and a positive, flexible attitude.

**Workforce/Labour Force:** The people engaged in or available for work in the Study Area.

# Preamble

The Southwest Alberta Region Skills Study Partnership is a collaboration between regional stakeholders 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 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 final product is a strategy that offers tangible solutions to local challenges related to the labour market, ensuring that resources are being best allocated and that efforts are coordinated for maximum results. The overarching goal of this work is to ensure Southwest Alberta Region has a productive and valued workforce that meets the needs of local employers and contributes to the local and regional economic competitiveness today and into the future.

Emerging from this work will be a series of reports specific to:

- Southwest Alberta
- SouthGrow
- City of Lethbridge
- Town of Taber
- Vulcan County
- Town of Fort MacLeod
- Town of Cardston

## Methodology – Phased Approach

The first phase of the project included a full background review and situational analysis for the Study Area. This report included labour supply and demand projections, definitions of the focus sectors identified by the project team, the development of a lifestyle asset inventory and an analysis of the education pipeline and graduation rates in the region.

The second phase of the project focused on community engagement, which collected a wide range of inputs from approximately 780 individuals within Southwest Alberta. Activities included surveying the Study Areas business, and job seeker communities (delivered in two phases due to COVID-19 interruptions), stakeholder interviews, and a series of 6 workshops focused on key stakeholder groups, including industry and educators.

The third and final phase of the project combines data from the earlier phases into regional and community level skills reports. Seven reports have been developed in this phase for Southwest Alberta, SouthGrow, The City of Lethbridge, Town of Taber, Vulcan County, Fort MacLeod and Cardston.

These regional and community level skills reports delve into three main areas:

- The economic context and projections for each region and community which provide a data-driven understanding of which sectors are projected to grow, decline, and require replacement workers due to retirements. This section also breaks down projected growth in targeted sectors identified by the project team, which include:

  - Renewable Energy
  - Agricultural Manufacturing
  - Other Manufacturing
  - Tourism
  - Transportation Logistics and Warehousing
  - Agriculture
  - Healthcare and Social Assistance

- The Education Pipeline and Graduation Rates/Patterns projected for each community are included to provide an understanding of the number of graduates expected in the region and their skill levels.
- The final section combines data from the previous studies to align the projected number of graduates and their skills levels to the projected labour demand looking out to 2025. This section identifies skills gaps or oversupply in each of the top occupations in the targeted sectors.

These profiles will support the development of the final deliverable, the Southwest Alberta Regional Skills Strategic action plan.

# About the Data

## Where does the data presented in this report comes from?

MDB Insight Inc. gathers Statistical data from Manifold Data Mining; this tool use census data to calculate current year estimates with the following approaches: enhanced cohort survival methods, collaborative filtering techniques, and structural coherence techniques. The cohort survival method is used as a foundation for developing population forecasts. In addition to historical trends from 1991 to 2016, Manifold Data Mining considers the current birth and mortality rates, migration and immigration statistics, labour force activities and economic indicators. This tool has developed nonlinear modelling techniques for estimating other demographic variables and preserving the coherence structure in the census data.[1]

Other sources include the Canadian Business Counts and employment projection developed by metroeconomics.

## About the Canadian Business Counts

Statistics Canada's Canadian Business Counts provides a record of business establishments by industry sector and size. This data is collected from the Canadian Revenue Agency (CRA). The Canadian Business Counts data records business counts as either "Without Employees" or "With Employees." The establishments in the "Without Employees" category include the self-employed (i.e. those who do not maintain an employee payroll but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Counts data use the Canada Revenue Agency as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than $30,000 are not included.

This section 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 Ajax as the criteria for registering are different for both. The Canadian Business Counts data are used primarily so that comparisons can be made to the Provincial Distribution of businesses across the same categories. In some cases, companies are registered in a community but operate in another community in the proximity.

## About the Employment Projections

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:

[1] https://www.polarisintelligence.com/resources/

- 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 areas 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.

## About the NOC Skill Levels – how NOCs are classified to a skill level

According to Statistics Canada[2], the skill level is defined first of all by the amount and type of education and training required to enter and perform the duties of an occupation. In determining skill level, the experience required for entry, and the complexity and responsibilities typical of an occupation are also considered in relation to other occupations. Four skill level categories are identified in the NOC. Each major, minor and unit group is assigned to one of the skill levels. The skill level categories are broad aggregates, reflecting four commonly accepted educational, training or preparatory routes for entering

[2] https://www.statcan.gc.ca/eng/subjects/standard/noc/2016/introductionV1.1

employment. Requirements for individual unit groups or occupations may overlap between the boundaries of the skill levels. For example, some occupations can be entered with either a university degree or a college diploma. When the entry requirements for a unit group or occupation reflect a range of possible educational and training specifications, skill level placement of the group was determined by considering several factors. These include the requirements most generally demanded by employers, the minor group context, complexity of overall responsibilities and knowledge requirements, as well as further training and specialization acquired on the job.

The classification describes the educational and training requirements for occupations. However, the education and experience of particular job incumbents may not correspond exactly to the level described. Individuals may be over-qualified for their work, or they may work in occupations for which the entry requirements have changed after they became employed.

It is important to note that the skill level categories are not intended to designate socio-economic status or prestige. Rather they are intended to reflect actual occupational entry requirements. These requirements are expressed in terms of the formal educational system and other types of training specified by employers. NOC skill level criteria are presented below:

**Skill Level A**

- University degree (bachelors, masters or doctorate)

**Skill Level B**

- Two to three years of post-secondary education at community college, institute of technology or CÉGEP
- Two to five years of apprenticeship training
- Three to four years of secondary school and more than two years of on-the-job training, occupation-specific training courses or specific work experience
- Occupations with supervisory responsibilities are also assigned to skill level B.
- Occupations with significant health and safety responsibilities (e.g., firefighters, police officers and licensed practical nurses) are assigned to skill level B.

**Skill Level C**

- Completion of secondary school and some short-duration courses or training specific to the occupation
- Some secondary school education, with up to two years of on-the-job training, training courses or specific work experience

**Skill Level D**

- Short work demonstration or on-the-job training
- No formal educational requirements

# 1. Executive Summary - SouthGrow Region Skills Profile

The Southwest Alberta Region Skills Study Partnership is a collaboration between regional stakeholders 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.

In 2018, the SouthGrow Region of Alberta had a population of 179,137 people. SouthGrow's population is projected to grow by 23% in the next ten years. This growth is driven by the increase expected for the City of Lethbridge. SouthGrow will experience a similar growth than that of the province, and higher growth than the broader Southwest Alberta Region (Study Area).

Labour force growth calculations were limited due to data suppression in several of the communities in the SouthGrow Region. In 2018, the healthcare and social assistance sector and retail trade employed the largest share of the labour force in the region (13% and 12%, respectively). The SouthGrow Region employment projections show a net requirement of 5,057 people to meet new employment demand by 2025; 89% of this growth is expected to take place in the city of Lethbridge.

## Engagement Findings

Key themes that emerged included:

- COVID-19 has had a significant effect on the economy, causing businesses to adopt technology and job seekers to change their approaches to employment and the sectors they are pursing
  - The most mentioned sectors seeing an increase in job postings by job seekers post COVID-19 were food services, healthcare, and agriculture.
  - 24% of job seeker respondents are temporarily or permanently laid off, and 18% have had their hours reduced.
  - 71% of job seekers mentioned they are very likely or likely going to consider employment in occupations that they may not have considered in the past.
- There is a perceived opportunity and skills gap between employers and job seekers in SouthGrow.
  - The majority of employers surveyed have experienced difficulties in recruiting and retaining talent (54%). In this group, the vast majority are 'very dissatisfied' or 'somewhat dissatisfied' with the availability of experienced workers in their industry and the availability of a trained, local workforce.
  - The majority of job seekers feel there are "poor or fair" job opportunities that match their skillset (65%) in the region.
  - The availability of qualified candidates and an ageing workforce/retirement were the most mentioned workforce challenges in SouthGrow.
  - SouthGrow businesses indicated that the most challenging attributes to hire or retain skilled trades (e.g. plumbers, painters) and workers with strong technical skills

- Stakeholders in SouthGrow indicated significant challenges in attracting and retaining talent from outside the region and are seeing residents leave to larger centres
- 46% of businesses reported that difficulties with skilled labour retention or recruitment were 'very likely,' 'somewhat likely' or 'likely' to influence their decision to stay in the region.
- Job seekers reported a lack of suitable job opportunities and a lack of adequately paying jobs were the most mentioned factors that significantly hindered job seekers' ability to get a job/better job.

- Opportunities to address challenges:
    - Industry and educators want to be working closely together to understand what skills are needed and how to prepare graduates for the workforce. This includes the expansion of experiential learning opportunities to support soft skills development and retain the workforce in the region.

## Education Pipeline

The SouthGrow Region is 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.

## Workforce Projections

Among all the sectors analyzed, health care is expected to have the highest projected demand by 2025. In total, the health care sector will require 1,070 new workers, followed by the tourism sector, which will require 556 new workers, and transportation, logistics and warehousing, which will require 350 new workers. Over the next five years, if the current educational pipeline maintains its trends and the region is successful in retaining graduates, SouthGrow should meet projected demand. However, the presence of graduates in the area does not mean they will remain to fill these projected jobs. The region should focus both on how to increase the supply of skilled workforce and connect these individuals with local opportunities to retain them.

Nonetheless, smaller communities within the region will have to make more significant efforts to attract the needed talent to their communities as the workforce is drawn to larger centres.

COVID-19 is likely to have a depressing effect on many sectors in the short term; from the selected industries, Tourism is expected to take the most significant hit. The other industries are likely to see continued or increased growth, particularly healthcare, which has been stress tested throughout the pandemic.

The SouthGrow Region has a significant oversupply of new graduates in the target sectors identified in this study. However, many new graduates do not have the necessary soft skills employers require.

# 2. Community Economic Context and Projections

## 2.1 Labour Supply and Demand/Projections/and Assessment

### 2.1.1 Population Growth

According to Manifold Data Mining, in 2018, the SouthGrow Region had a population of approximately 179,137 people; this represents 87% of the Study Area's total population and 4% of Alberta's residents. It is important to note that 56% of the SouthGrow Region population is concentrated in the city of Lethbridge. During the next ten years, the region's population is expected to grow by 23%, and this means 40,854 new people will reside in the SouthGrow area by 2028. The region will experience similar growth to the province and higher growth than the Study Area. This growth is going to take place mainly in the city of Lethbridge.

**Figure 1: Population growth projections, 2018-2028**

| Year | SouthGrow | Study Area | Alberta |
|---|---|---|---|
| **2018 Total population** | 179,137 | 206,271 | 4,417,880 |
| **2023 Total population** | 198,669 | 227,253 | 4,925,270 |
| **2028 Total population** | 219,991 | 250,136 | 5,490,940 |
| **10-year net change** | 40,854 | 43,865 | 1,073,060 |
| **10-year % change** | 23% | 21% | 24% |

Source: Manifold Data Mining. 2018

### 2.1.2 Labour Force and Industry Sectors

In 2018, SouthGrow recorded a total labour force of approximately 94,669 people, which represented 87% of the Study Area labour force. Due to data limitations for some of the communities within this region for 2011, it is not possible to calculate statistically reliable labour force changes.

**Figure 2: Labour Force Change, 2011-2018**

| Period | SouthGrow | Study Area | Alberta |
|---|---|---|---|
| **Labour force 2018** | 94,669 | 108,281 | 2,559,960 |
| **Labour force 2011** | 72,785 | 80,455 | 2,115,640 |
| **% Change** | Not applicable | Not applicable | 21% |

Source: Statistics Canada, 2011 National Household Survey | Manifold Data Mining Inc. 2018

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

Most of the labour force in SouthGrow are employed in sectors such as health care and social assistance (13%), and retail trade (12%). These sectors also employ the largest share of the labour force in the Study Area and Alberta.

**Figure 3: Labour Force (15 years and over) Employed by Industry Sector (2-Digit NAICS)**

| 2-Digital Labor Force | SouthGrow | Study Area | Alberta |
|---|---|---|---|
| **11 Agriculture, forestry, fishing and hunting** | 7% | 8% | 3% |
| **21 Mining, quarrying, and oil and gas extraction** | 2% | 3% | 6% |
| **22 Utilities** | 1% | 1% | 1% |
| **23 Construction** | 8% | 9% | 10% |
| **31-33 Manufacturing** | 7% | 7% | 6% |
| **41 Wholesale trade** | 3% | 3% | 4% |
| **44-45 Retail trade** | 12% | 12% | 11% |
| **48-49 Transportation and warehousing** | 4% | 4% | 5% |
| **51 Information and cultural industries** | 1% | 1% | 2% |
| **52 Finance and insurance** | 3% | 3% | 3% |
| **53 Real estate and rental and leasing** | 1% | 1% | 2% |
| **54 Professional, scientific and technical services** | 4% | 4% | 7% |
| **55 Management of companies and enterprises** | 0% | 0% | 0% |
| **56 Administrative and support, waste management and remediation services** | 4% | 4% | 4% |
| **61 Educational services** | 8% | 8% | 6% |
| **62 Health care and social assistance** | 13% | 13% | 11% |
| **71 Arts, entertainment, and recreation** | 2% | 2% | 2% |
| **72 Accommodation and food services** | 7% | 7% | 7% |
| **81 Other services (except public administration)** | 5% | 5% | 5% |
| **91 Public administration** | 5% | 5% | 5% |

Source: Manifold Data Mining. 2018

## 2.1.3 Labour Demand Projections

Metroeconomics projects that by 2025, a total of 5,057 workers will be needed to meet the employment demand in the SouthGrow Region; this represented an increase of 7% compared to the employment estimates in 2020. Most of this growth will be in arts, entertainment and recreation, and educational services.

**Figure 4: Employment Projections (Place of Work) by Industry Sector, 2020-2025**

| Industry Sector | 2020 | 2025 | Net Change | % Change |
|---|---|---|---|---|
| **Total all industries** | 71,622 | 76,679 | 5,057 | 7% |
| **11 Agriculture, forestry, fishing and hunting** | 5363 | 5,446 | 83 | 2% |
| **21 Mining, quarrying, and oil and gas extraction** | 577 | 594 | 17 | 3% |
| **22 Utilities** | 483 | 469 | -14 | -3% |
| **23 Construction** | 3,267 | 3,542 | 275 | 8% |
| **31-33 Manufacturing** | 6,567 | 6,553 | -13 | 0% |
| **41 Wholesale trade** | 2,276 | 2,230 | -46 | -2% |
| **44-45 Retail trade** | 9,105 | 9,582 | 477 | 5% |
| **48-49 Transportation and warehousing** | 2,225 | 2,475 | 250 | 11% |
| **51 Information and cultural industries** | 812 | 844 | 32 | 4% |
| **52 Finance and insurance** | 1,892 | 1,971 | 79 | 4% |
| **53 Real estate and rental and leasing** | 1,047 | 1,148 | 101 | 10% |
| **54 Professional, scientific and technical services** | 3,010 | 3,153 | 143 | 5% |
| **55 Management of companies and enterprises** | 2,168 | 2,376 | 208 | 10% |
| **56 Administrative and support, waste management and remediation services** | 7,065 | 7,669 | 604 | 9% |
| **61 Educational services** | 11,454 | 12,970 | 1,516 | 13% |
| **62 Health care and social assistance** | 1,228 | 1,360 | 131 | 11% |
| **71 Arts, entertainment, and recreation** | 5,472 | 6,233 | 762 | 14% |
| **72 Accommodation and food services** | 3,246 | 3,456 | 210 | 6% |
| **81 Other services (except public administration)** | 4,364 | 4,608 | 244 | 6% |

Source: metroeconomics 2020

## 2.2 Labour Profile and Sector Analysis

The SouthGrow Region, along with the regional partners, identified the key industry sectors for the local economy. These sectors are:

| Sector | Total Labour | Total Businesses |
|---|---|---|
| Renewable Energy | 494 | 32 |
| Agricultural Manufacturing | 2,004 | 57 |
| Other Manufacturing | 3,744 | 273 |
| Tourism | 8,630 | 728 |
| Transportation Logistics and Warehousing | 6,684 | 1,575 |
| Agriculture | 7,810 | 3,951 |
| Healthcare and Social Assistance | 11,893 | 1,212 |

This section will showcase the total labour force employed within these sectors and analyze the total number of businesses with employees in each of the industry subsectors.

### Renewable Energy

A total of 494 residents were employed in the renewable energy sector; most of these people were engaged in electric power generation, transmission, and distribution. In terms of businesses, a total of 32 companies were recorded in this sector in the SouthGrow Region: 18 in remediation and other waste management services; 13 in electric power generation, transmission, and distribution; and one in engine, Turbine, and Power Transmission Equipment Manufacturing.

**Figure 5: Labour Force and Business in Renewable Energy**

| NAICS | Labour Force | Total Businesses |
|---|---|---|
| 2211 Electric Power Generation, Transmission and Distribution | 447 | 13 |
| 3336 Engine, Turbine, and Power Transmission Equipment Manufacturing | 13 | 1 |
| 5629 Remediation and Other Waste Management Services | 34 | 18 |
| **Total** | 494 | 32 |

Source: Manifold Data Mining, 2018 | Statistics Canada; Canadian Business Counts, December 2019

## Agricultural Manufacturing

A total of 2,004 residents were employed in the agricultural manufacturing sector; most of these people were engaged in fruit and vegetable preserving and specialty food manufacturing, followed by other food manufacturing. In terms of businesses, a total of 57 companies were recorded in this sector in the SouthGrow Region. Most of these businesses were in other food production (15) and animal food manufacturing (13).

**Figure 6: Labour Force and Business in Agricultural Manufacturing**

| NAICS | Labour Force | Total Businesses |
|---|---|---|
| **3111 Animal food manufacturing** | 97 | 13 |
| **3112 Grain and oilseed milling** | 180 | 4 |
| **3113 Sugar and confectionery product manufacturing** | 161 | 1 |
| **3114 Fruit and vegetable preserving and specialty food manufacturing** | 627 | 6 |
| **3115 Dairy product manufacturing** | 141 | 4 |
| **3117 Seafood product preparation and packaging** | 42 | 0 |
| **3118 Bakeries and tortilla manufacturing** | 178 | 9 |
| **3119 Other food manufacturing** | 348 | 15 |
| **3121 Beverage manufacturing** | 228 | 5 |
| **3122 Tobacco manufacturing** | 2 | 0 |
| **Total** | 2,004 | 57 |

Source: Manifold Data Mining, 2018 | Statistics Canada; Canadian Business Counts, December 2019

## Other Manufacturing

A total of 3,744 residents were employed in other manufacturing industries; most of these people were engaged in architectural and structural metals manufacturing (403), and motor vehicle body and trailer manufacturing (333 people). In terms of businesses, a total of 273 businesses were recorded in this sector in the SouthGrow Region. Most of these businesses were in other miscellaneous manufacturing (38), household and institutional furniture and kitchen cabinet manufacturing (29), and printing and related support activities (17).

**Figure 7: Labour Force and Business in Other Manufacturing**

| NAICS | Labour Force | Total Businesses |
|---|---|---|
| 3132 Fabric mills | 1 | 0 |
| 3133 Textile and fabric finishing and fabric coating | 0 | 1 |
| 3141 Textile furnishings mills | 1 | 0 |
| 3149 Other textile product mills | 13 | 4 |
| 3151 Clothing knitting mills | 0 | 0 |
| 3159 Clothing accessories and other clothing manufacturing | 0 | 6 |
| 3161 Leather and hide tanning and finishing | 0 | 1 |
| 3162 Footwear manufacturing | 1 | 1 |
| 3169 Other leather and allied product manufacturing | 0 | 0 |
| 3211 Sawmills and wood preservation | 46 | 0 |
| 3212 Veneer, plywood and engineered wood product manufacturing | 44 | 1 |
| 3219 Other wood product manufacturing | 281 | 14 |
| 3221 Pulp, paper and paperboard mills | 19 | 0 |
| 3222 Converted paper product manufacturing | 14 | 0 |
| 3231 Printing and related support activities | 134 | 17 |
| 3241 Petroleum and coal products manufacturing | 69 | 2 |
| 3251 Basic chemical manufacturing | 20 | 1 |
| 3252 Resin, synthetic rubber, and artificial and synthetic fibres and filaments | 3 | 1 |
| 3253 Pesticide, fertilizer and other agricultural chemical manufacturing | 5 | 2 |
| 3254 Pharmaceutical and medicine manufacturing | 26 | 0 |
| 3255 Paint, coating and adhesive manufacturing | 15 | 3 |
| 3256 Soap, cleaning compound and toilet preparation manufacturing | 18 | 1 |
| 3259 Other chemical product manufacturing | 34 | 3 |
| 3261 Plastic product manufacturing | 172 | 11 |
| 3262 Rubber product manufacturing | 4 | 0 |
| 3271 Clay product and refractory manufacturing | 46 | 0 |
| 3272 Glass and glass product manufacturing | 40 | 1 |
| 3273 Cement and concrete product manufacturing | 135 | 12 |
| 3274 Lime and gypsum product manufacturing | 13 | 0 |
| 3279 Other non-metallic mineral product manufacturing | 50 | 3 |
| 3311 Iron and steel mills and ferro-alloy manufacturing | 39 | 0 |
| 3312 Steel product manufacturing from purchased steel | 8 | 3 |
| 3313 Alumina and aluminum production and processing | 34 | 0 |
| 3314 Non-ferrous metal (except aluminum) production and processing | 21 | 0 |
| 3315 Foundries | 143 | 1 |
| 3321 Forging and stamping | 13 | 3 |
| 3322 Cutlery and hand tool manufacturing | 11 | 0 |
| 3323 Architectural and structural metals manufacturing | 403 | 15 |
| 3324 Boiler, tank and shipping container manufacturing | 210 | 8 |
| 3326 Spring and wire product manufacturing | 7 | 0 |
| 3327 Machine shops, turned product, and screw, nut and bolt | 115 | 8 |

| NAICS | Labour Force | Total Businesses |
|---|---|---|
| **3328 Coating, engraving, heat treating and allied activities** | 9 | 1 |
| **3329 Other fabricated metal product manufacturing** | 40 | 15 |
| **3331 Agricultural, construction and mining machinery manufacturing** | 113 | 16 |
| **3332 Industrial machinery manufacturing** | 21 | 1 |
| **3333 Commercial and service industry machinery manufacturing** | 11 | 3 |
| **3334 Ventilation, heating, A/C and commercial refrigeration equip.** | 20 | 2 |
| **3335 Metalworking machinery manufacturing** | 15 | 6 |
| **3336 Engine, turbine and power transmission equipment manufacturing** | 13 | 1 |
| **3339 Other general-purpose machinery manufacturing** | 46 | 3 |
| **3341 Computer and peripheral equipment manufacturing** | 3 | 1 |
| **3342 Communications equipment manufacturing** | 12 | 2 |
| **3343 Audio and video equipment manufacturing** | 1 | 0 |
| **3344 Semiconductor and other electronic component manufacturing** | 17 | 0 |
| **3345 Navigational, measuring, medical and control instruments** | 28 | 2 |
| **3346 Manufacturing and reproducing magnetic and optical media** | 1 | 0 |
| **3351 Electric lighting equipment manufacturing** | 1 | 0 |
| **3352 Household appliance manufacturing** | 1 | 0 |
| **3353 Electrical equipment manufacturing** | 21 | 0 |
| **3359 Other electrical equipment and component manufacturing** | 2 | 2 |
| **3361 Motor vehicle manufacturing** | 64 | 0 |
| **3362 Motor vehicle body and trailer manufacturing** | 333 | 8 |
| **3363 Motor vehicle parts manufacturing** | 90 | 1 |
| **3364 Aerospace product and parts manufacturing** | 122 | 1 |
| **3365 Railroad rolling stock manufacturing** | 2 | 0 |
| **3366 Ship and boat building** | 4 | 0 |
| **3369 Other transportation equipment manufacturing** | 21 | 0 |
| **3371 Household and institutional furniture and kitchen cabinet** | 273 | 29 |
| **3372 Office furniture (including fixtures) manufacturing** | 34 | 4 |
| **3379 Other furniture-related product manufacturing** | 16 | 0 |
| **3391 Medical equipment and supplies manufacturing** | 10 | 14 |
| **3399 Other miscellaneous manufacturing** | 192 | 38 |
| **Total** | 3,744 | 273 |

Source: Manifold Data Mining, 2018 | Statistics Canada; Canadian Business Counts, December 2019

## Tourism

A total of 8,630 residents were employed in tourism-related industries; most of these people were employed in full-service restaurants and limited-service eating places (5,240 people), and other amusement and recreation industries (798 people). In terms of businesses, a total of 728 businesses were recorded in this sector in the SouthGrow Region. Most of these businesses were full-service restaurants and limited service eating places (310), other amusement and recreation industries (100), and traveller accommodation (49).

**Figure 8: Labour Force and Business in Tourism Related Industries**

| NAICS | Labour Force | Total Businesses |
|---|---|---|
| **4532 Office supplies, stationery and gift stores** | 224 | 24 |
| **4811 Scheduled air transportation** | 56 | 1 |
| **4812 Non-scheduled air transportation** | 24 | 8 |
| **4821 Rail Transportation** | 205 | 2 |
| **4872 Scenic and sightseeing transportation, water** | 1 | 1 |
| **5615 Travel arrangement and reservation services** | 143 | 20 |
| **7111 Performing arts companies** | 76 | 38 |
| **7112 Spectator sports** | 99 | 15 |
| **7113 Promoters (presenters) of performing arts, sports and similar events** | 59 | 9 |
| **7114 Agents and managers for artists, athletes, entertainers and other public figures** | 1 | 2 |
| **7115 Independent artists, writers and performers** | 168 | 32 |
| **7121 Heritage institutions** | 275 | 10 |
| **7131 Amusement parks and arcades** | 9 | 3 |
| **7132 Gambling industries** | 201 | 6 |
| **7139 Other amusement and recreation industries** | 798 | 100 |
| **7211 Traveller accommodation** | 573 | 49 |
| **7212 Recreational vehicle (RV) parks and recreational camps** | 39 | 31 |
| **7213 Rooming and boarding houses** | 1 | 0 |
| **7223 Special food services** | 300 | 39 |
| **7224 Drinking places (alcoholic beverages)** | 138 | 28 |
| **7225 Full-service restaurants and limited service eating places** | 5,240 | 310 |
| **Total** | 8,630 | 728 |

Source: Manifold Data Mining, 2018 | Statistics Canada; Canadian Business Counts, December 2019

## Transportation Logistics and Warehousing

A total of 6,684 residents were employed in transportation logistics and warehousing industries. Most of these people were engaged in general freight trucking (1,303 people), and specialized freight trucking (677 people). In terms of businesses, a total of 1,575 businesses were recorded in this sector in the SouthGrow Region. Most of these businesses were in general freight trucking (566) and specialized freight trucking (265).

**Figure 9: Labour Force and Business in Transportation Logistics and Warehousing**

| NAICS | Labour Force | Total Businesses |
|---|---|---|
| 4111 Farm product merchant wholesaler | 157 | 54 |
| 4121 Petroleum and petroleum products merchant wholesalers | 38 | 20 |
| 4131 Food merchant wholesalers | 281 | 30 |
| 4132 Beverage merchant wholesalers | 65 | 9 |
| 4133 Cigarette and tobacco product merchant wholesalers | 3 | 0 |
| 4142 Home entertainment equipment and household appliance merchant wholesalers | 8 | 2 |
| 4143 Home furnishings merchant wholesalers | 14 | 3 |
| 4144 Personal goods merchant wholesalers | 54 | 3 |
| 4145 Pharmaceuticals, toiletries, cosmetics, and sundries merchant wholesalers | 36 | 10 |
| 4151 Motor vehicle merchant wholesalers | 146 | 25 |
| 4152 New motor vehicle parts and accessories merchant wholesalers | 117 | 22 |
| 4153 Used motor vehicle parts and accessories merchant wholesalers | 19 | 3 |
| 4161 Electrical, plumbing, heating and air-conditioning equipment and supplies merchant wholesalers | 146 | 21 |
| 4162 Metal service centres | 99 | 9 |
| 4163 Lumber, millwork, hardware and other building supplies merchant wholesalers | 250 | 44 |
| 4171 Farm, lawn and garden machinery and equipment merchant wholesalers | 396 | 67 |
| 4172 Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers | 270 | 34 |
| 4173 Computer and communications equipment and supplies merchant wholesalers | 125 | 4 |
| 4179 Other machinery, equipment and supplies merchant wholesalers | 110 | 21 |
| 4182 Paper, paper product and disposable plastic product merchant wholesalers | 24 | 4 |
| 4183 Agricultural supplies merchant wholesalers | 178 | 63 |
| 4184 Chemical (except agricultural) and allied product merchant wholesalers | 23 | 8 |
| 4189 Other miscellaneous merchant wholesalers | 111 | 20 |
| 4191 Business-to-business electronic markets, and agents and brokers | 105 | 29 |
| 4811 Scheduled air transportation | 56 | 1 |
| 4812 Non-scheduled air transportation | 24 | 8 |
| 4821 Rail Transportation | 205 | 2 |
| 4841 General freight trucking | 1,303 | 566 |
| 4842 Specialized freight trucking | 677 | 265 |
| 4851 Urban transit systems | 62 | 1 |
| 4852 Interurban and rural bus transportation | 20 | 1 |
| 4853 Taxi and limousine service | 145 | 44 |
| 4854 School and employee bus transportation | 151 | 12 |
| 4855 Charter bus industry | 14 | 2 |

| NAICS | Labour Force | Total Businesses |
|---|---|---|
| **4859 Other transit and ground passenger transportation** | 18 | 7 |
| **4862 Pipeline transportation of natural gas** | 2 | 0 |
| **4869 Other pipeline transportation** | 0 | 1 |
| **4871 Scenic and sightseeing transportation, land** | 0 | 0 |
| **4872 Scenic and sightseeing transportation, water** | 1 | 1 |
| **4881 Support activities for air transportation** | 64 | 9 |
| **4882 Support activities for rail transportation** | 23 | 4 |
| **4883 Support activities for water transportation** | 36 | 1 |
| **4884 Support activities for road transportation** | 97 | 21 |
| **4885 Freight transportation arrangement** | 92 | 17 |
| **4889 Other support activities for transportation** | 15 | 7 |
| **4911 Postal service** | 285 | 1 |
| **4921 Couriers** | 251 | 31 |
| **4922 Local messengers and local delivery** | 25 | 21 |
| **4931 Warehousing and storage** | 200 | 27 |
| **5615 Travel arrangement and reservation services** | 143 | 20 |
| **Total** | 6,684 | 1,575 |

Source: Manifold Data Mining, 2018 | Statistics Canada; Canadian Business Counts, December 2019

## Agriculture

A total of 7,810 residents were employed in agriculture industries; most of these people were employed in farms - except greenhouses and aquaculture (6,270 people), and farm, lawn and garden machinery and equipment merchant wholesalers (396 people). In terms of businesses, a total of 3,951 businesses were recorded in this sector in the SouthGrow Region. Most of these businesses were farms - except greenhouses and aquaculture (3,410), support activities for farms (275), and farm, lawn and garden machinery and equipment merchant wholesalers (67).

**Figure 10: Labour Force and Business in Agriculture**

| NAICS | Labour Force | Total Businesses |
|---|---|---|
| **1110 Farms (except Greenhouses and Aquaculture)(1111 to 1124 and 1129)** | 6,270 | 3,410 |
| **1114 Greenhouse, nursery and floriculture production** | 164 | 24 |
| **1125 Aquaculture** | 4 | 1 |
| **1141 Fishing** | 76 | 0 |
| **1142 Hunting and trapping** | 0 | 12 |
| **1150 Support activities for farms (1151 and 1152)** | 134 | 275 |
| **1153 Support activities for forestry** | 82 | 6 |
| **4111 Farm product merchant wholesaler** | 157 | 54 |
| **4131 Food merchant wholesalers** | 281 | 30 |
| **4132 Beverage merchant wholesalers** | 65 | 9 |
| **4133 Cigarette and tobacco product merchant wholesalers** | 3 | 0 |
| **4171 Farm, lawn and garden machinery and equipment merchant wholesalers** | 396 | 67 |
| **4183 Agricultural supplies merchant wholesalers** | 178 | 63 |
| **Total** | 7,810 | 3,951 |

Source: Manifold Data Mining, 2018 | Statistics Canada; Canadian Business Counts, December 2019

## Healthcare and Social Assistance

A total of 11,893 residents were employed in the healthcare and social assistance sector; most of these people were employed in hospitals (3,205 people), and nursing and residential care facilities (2,237 people). In terms of businesses, a total of 1,212 businesses were recorded in this sector in the SouthGrow Region. Most of these businesses were offices of physicians (354), offices of other health practitioners (288), and child day-care services (174).

**Figure 11: Labour Force and Business in Healthcare and Social Assistance**

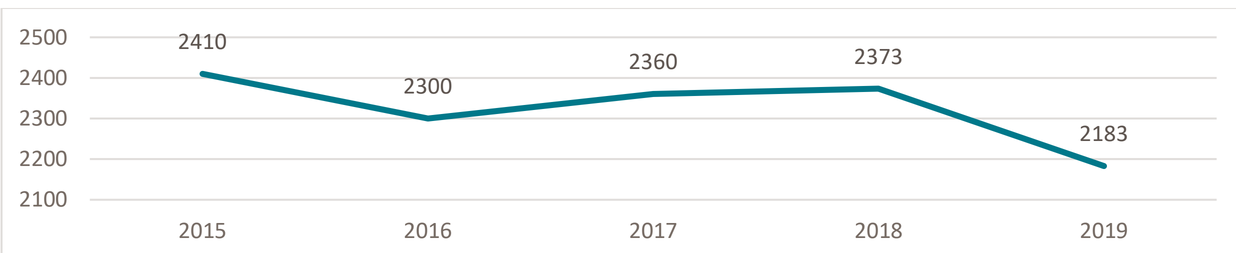
| NAICS | Labour Force | Total Businesses |
|---|---|---|
| **6211 Offices of Physicians** | 1,492 | 354 |
| **6212 Offices of Dentists** | 828 | 136 |
| **6213 Offices of Other Health Practitioners** | 972 | 288 |
| **6214 Out-patient care centres** | 389 | 52 |
| **6215 Medical and Diagnostic Laboratories** | 138 | 12 |
| **6216 Home Health Care Services** | 292 | 18 |
| **6219 Other Ambulatory Health Care Services** | 109 | 7 |
| **6220 Hospitals (6221 to 6223)** | 3,205 | 18 |
| **6230 Nursing and residential care facilities (6231 to 6239)** | 2,237 | 45 |
| **6241 Individual and Family Services** | 1,383 | 88 |
| **6242 Community Food and Housing, and Emergency and Other Relief Services** | 47 | 15 |
| **6243 Vocational Rehabilitation Services** | 94 | 5 |
| **6244 Child day-care services** | 707 | 174 |
| **Total** | 11,893 | 1,212 |

Source: Manifold Data Mining, 2018 | Statistics Canada; Canadian Business Counts, December 2019

## 2.3 Education Pipeline and Graduation Rates/Patterns

An average of 2,325 students have enrolled in schools within the SouthGrow Region. 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. The Southern Alberta Occupations Requirements section of the Phase 1 Report projected that between 2020 and 2025, there will be a net demand of 5,057 new job openings that will need to be filled due to newly created positions and upcoming retirements. If the number of final-year secondary students remains constant for the next five years, this will result in approximately 11,625 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 in the region, SouthGrow's ability to provide labour will depend on the career paths that these students pursue. 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.

**Figure 12: Grade 12 enrollment in the SouthGrow Region 2015-2019**




Source: Alberta Open Data. https://open.alberta.ca/opendata/high-school-enrollments-by-municipality

In terms of post-secondary graduates, the data was divided between college graduates and university graduates to identify those individuals within the skill levels better A (university education) and B (college education). The data presented bellow identifies individuals who completed a program at a public post-secondary institution in the Lethbridge Service Area (Figure 15). These institutions include the University of Lethbridge and the Lethbridge College.

### University Education

Most of the individuals who graduated from the University of Lethbridge between 2014 and 2019 obtained a degree in business, followed by languages, social sciences, arts and humanities.

**Figure 13: Estimates of numbers of graduates - University of Lethbridge (2014 to 2019)**

| Program Band | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 | Total |
|---|---|---|---|---|---|---|
| **Business** | 470 | 461 | 473 | 448 | 409 | 2,261 |
| **Education** | 239 | 245 | 252 | 226 | 249 | 1,211 |
| **Health Science** | 383 | 381 | 324 | 317 | 332 | 1,737 |
| **Languages, Social Sciences, Arts & Humanities** | 457 | 458 | 428 | 414 | 424 | 2,181 |
| **Legal & Security** | 0 | 0 | 0 | 0 | 0 | 0 |
| **Physical, Natural & Applied Sciences** | 235 | 242 | 251 | 266 | 266 | 1,260 |
| **Recreation** | 95 | 94 | 99 | 90 | 92 | 470 |
| **Trades & Technologists** | 0 | 0 | 0 | 0 | 0 | 0 |

Source: LERS Cubes

## College Education

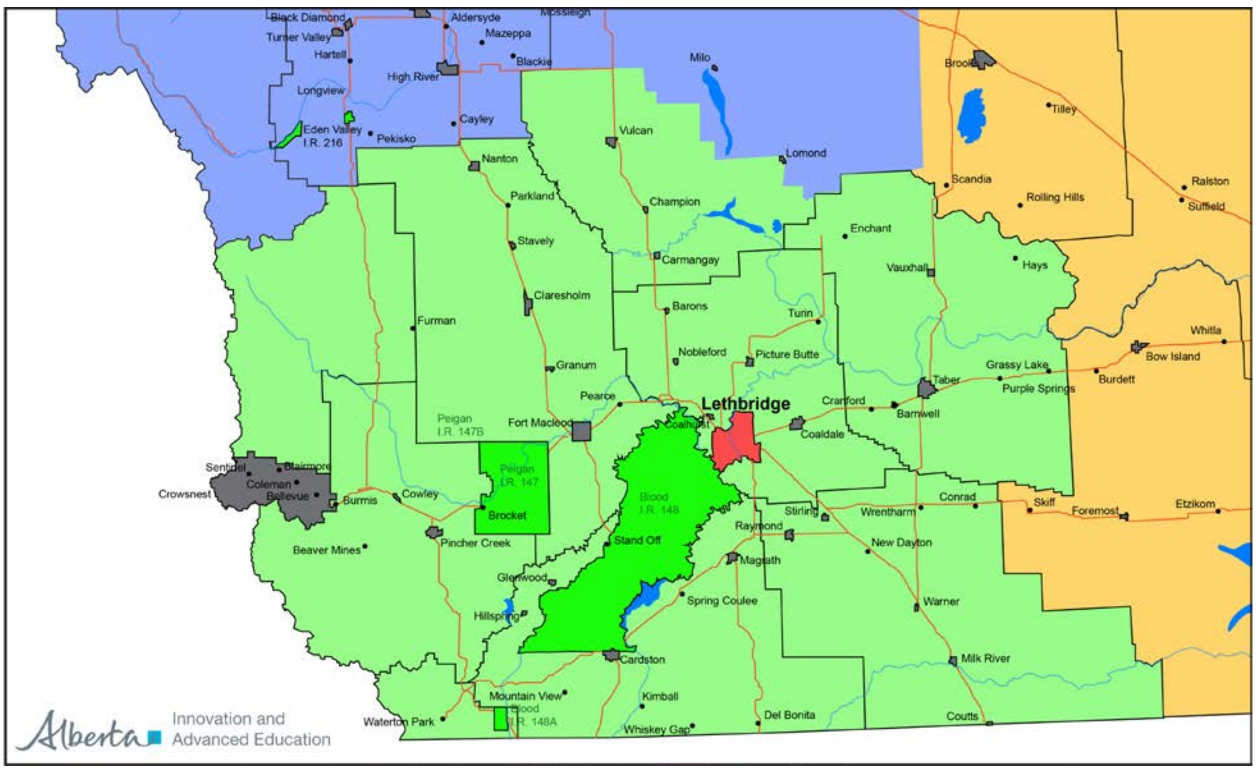
Most of the individuals who graduated from Lethbridge College between 2014 and 2019 obtained a diploma in trades and technologies, followed by health science, and legal and security.

**Figure 14: Estimates of numbers of graduates – Lethbridge College (2014 to 2019)**

| Program Band | 2014-2015 | 2015-2016 | 2016-2017 | 2017-2018 | 2018-2019 | Total |
|---|---|---|---|---|---|---|
| **Business** | 161 | 148 | 162 | 137 | 148 | 756 |
| **Education** | 12 | 21 | 38 | 47 | 39 | 157 |
| **Health Science** | 362 | 336 | 313 | 308 | 363 | 1,682 |
| **Languages, Social Sciences, Arts & Humanities** | 229 | 159 | 186 | 164 | 197 | 935 |
| **Legal & Security** | 200 | 144 | 211 | 220 | 302 | 1,077 |
| **Physical, Natural & Applied Sciences** | 183 | 181 | 192 | 212 | 239 | 1,007 |
| **Recreation** | 16 | 15 | 20 | 18 | 18 | 87 |
| **Trades & Technologists** | 393 | 396 | 378 | 361 | 312 | 1,840 |

Source: LERS Cubes

**Figure 15: Lethbridge Service Area – Innovation and Advanced Education Alberta**




Source: Alberta Ministry of Innovation and Advanced Education

# 3. Local Consultation and Engagement

Engagement activities were designed to encourage participants across Southwest Alberta to share their experiences and insights related to workforce issues and challenges, and gaps and opportunities that would improve the region's positioning in having a strong pipeline of talent. The comments in this section reflect the views, perceptions, and opinions as received. They have not been vetted for accuracy, instead reflect individual participant perspectives and viewpoints. Insights gathered, and conclusions drawn from the engagement and consultation activities reflect the collective responses. They should not be taken as generalizations about all employers or job seekers within the study area.

A wide range of inputs from approximately 780 individuals within Southwest Alberta has helped form this local consultation and engagement report. Drawing from the extensive consultative initiatives that were conducted 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 relating to SouthGrow. It is these themes and priorities that reflect the perceptions of participants.

Each section below highlights the themes most relevant to SouthGrow; for the full engagement report, see the Southwest Alberta Regional Skills Study Consultation Input Summary Report.

## 3.1 Business Telephone Survey

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 and delayed as a result of COVID-19 emergency measures causing businesses to close temporarily. This resulted in the data collection being separated into two parts. 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. The part one survey comprised 117 businesses from SouthGrow, not from Lethbridge, whereas wave 2 totalled 25 businesses for a total of 142. The purpose of this section of the report is to highlight key insights from the survey that are relevant to SouthGrow.

### 3.1.1 Local Employer Survey Part 1

#### Profile of Local Businesses and Employees

- **Business location –** Out of the 309 business survey respondents, 117 were located within the SouthGrow region and 88% considered themselves to be locally owned and operated, in line with the overall Study Area at 86%.
- **Years of operation –** 86% of respondents stated they had been in operation for more than ten years. Only one of the respondents indicated that they were new businesses less than a year old, and 7% stated that they had been in operation for 6 to 10 years.
- **Industry type –** The top industry types included: agriculture (35%), general manufacturing (7%), transportation (4%) and health and social assistance (4%). Agriculture was the largest category across the study region, at 19%.

- **Total number of employees –** 64% of respondent's businesses were small, with between 1 to 10 employees.
- **High level of business satisfaction –** Overall, 90% of SouthGrow respondents indicated that they were either 'very satisfied' or 'somewhat satisfied' with operating a business in the region.

## Key Business Talent Attraction and Retention Satisfaction Indicators

- **Key challenges related to recruiting, hiring, and retaining employees –** 54% of businesses indicated having experienced challenges recruiting or retaining employees. Of the businesses experiencing challenges, 92% reported that the availability of qualified candidates was either 'a significant' or 'somewhat of a challenge.' This was followed by 49% for the perceptions of liveability within the community and 38% regarding the availability of affordable housing.
- **Difficult skills, knowledge and/or abilities to hire or retain –** Skilled trades (e.g. plumbers, painters) and workers with strong technical skills were the most challenging sectors.
- **12-month hiring intentions –** Nearly half (47%) from SouthGrow indicated that they are planning to hire new employees within the coming year, slightly lower than the overall results in the survey area of 52%.
- **In-demand occupations/positions –** The top three mentioned occupations/positions in demand were: cashiers/helpers/general labourers, sales/service workers and skilled trades.
- **Level of satisfaction regarding workforce development –** 75% of respondents were 'very satisfied' or 'somewhat satisfied' with professional development opportunities for staff; 57% with the availability of prime-working-aged people (ages 25-54) in the region, and 67% for the availability of workers with the appropriate education
  - Conversely, 52% were 'very dissatisfied' or 'somewhat dissatisfied' with the availability of a trained local workforce to recruit from and government and non-profit/community support activities 48%.
  - 45% of SouthGrow businesses were somewhat or very dissatisfied with the availability of experienced workers in their industry. Overall, these factors indicate that while workers are abundant with the appropriate level of education, there is a disconnect between this education and the tangible skills employees bring into the workforce.
- **Likelihood of staying in the region –** Slightly above half of the SouthGrow respondents (54%) indicated that difficulties with skilled labour retention or recruitment are 'likely,' 'somewhat likely,' or 'very likely' to influence their decision to stay operating within the region.

## Support Requirements

- **Needed educational/training services –** The most commonly mentioned educational training or certification programs included: more class 1 and class 3 drivers licence training programs, more significant training for students and youths on increasing soft skill development. Technical and skilled trade development was also deemed necessary

- **Tendency to hire local talent –** 62% of SouthGrow respondents indicated that they do not recruit labour from outside of the region, in line with the 67% reported the survey area. When hiring outside of the region, other areas in Alberta was the most common choice, followed by BC and Saskatchewan.
- **Limited R&D investments within SouthGrow –** 60% of SouthGrow respondents indicated that they do not allocate any percentage of revenue towards R&D activities. Of those firms that do engage with R&D, 32% spend less than 10% of total revenue.
- **Talent retention and recruitment should be prioritized in this strategy –** 24% of SouthGrow respondents felt that recruitment of talent is the most crucial labour force issue, followed by retention of talent to the area 22%. Respondents also felt that better understanding what the region has to offer needs significant focus. Overall, these results fall in line with the broader survey area responses.
- **Current employee retention and attraction tactics –** More competitive wages and benefits were the most common tactics to increase employee retention and attraction, followed by investments in professional development opportunities.
- **Spending on professional development activities –** Of those respondents who knew their professional development spend, 19% of SouthGrow respondents indicated that they do not spend anything. Of those that do spend money on professional development, 41% spend between $1 and $1,000 on development activities. When asked what they expect their professional development spend to total the following five years, 39% of respondents felt that it would increase, whereas 44% felt it would remain the same.
- **Encouraging employee training and development –** 84% indicated that they 'strongly agree' or 'somewhat agree' that they encourage and support employees that want to learn new skills by helping them complete accredited training programs even if it costs them more.

### Hiring Immigrant Workers

- **ESL/Language barriers are the most mentioned factor impeding SouthGrow businesses hiring immigrant workers** – Followed by concerns that qualifications/professional designations do not meet the Canadian standard and adequate resumes. A minority (36%) indicated they do not have any barriers to hiring immigrant workers; this was lower in SouthGrow compared to Lethbridge and SouthWest Alberta at 50%, respectively.
- **Information and support services needed to increase immigrant hiring -** Improved access to language and culture training was the most mentioned support service that would increase businesses' likelihood of hiring immigrant workers, followed by information on where to recruit specific skill sets outside the country and settlement support services.
- **The preferred method to obtain further immigration support and information –** The sharing of best practices (86%), Webinars (83%), and ESL Providers (72%) were the top-ranked preferences by SouthGrow businesses on engaging with further immigration support information.

## 3.1.2 Local Employer Survey Part 2

### Profile of Local Businesses and employees

- **Businesses type –** Of the 25 SouthGrow businesses included in this survey, the majority (88%) are locally owned and operated, compared to 81% for the entire survey region
- **Years of operation –** All of the SouthGrow business respondents had been in operation for more than ten years (100%), higher than the survey region at 83%
- **Industry type –** The most common industry represented was agriculture (48%). Most of the other respondents listed 'other industries,' which included firms with professional services and retail.
- **Total number of employees –** The majority of SouthGrow businesses surveyed were small businesses with ten or fewer employees (76% of respondents), 5 percent more than the entire survey area. 20% were medium to large businesses with 11 to 50 employees.
- **SouthGrow businesses are very satisfied with operating in the Southwest Alberta Region –** 100% of surveyed firms indicated that they were either 'very satisfied' or 'somewhat satisfied,' which is 6% higher than the overall results gained from the survey region.

### Pre-COVID-19

**Workforce Challenges –** 54% of respondents have experienced challenges in recruiting or retaining employees. Of employers that have experienced challenges, 56% indicated the availability of qualified candidates as either a 'significant challenge' or 'somewhat of a challenge. Other challenges included language barriers (32%), ageing workforce/retirement (28%) and the availability of affordable housing (28%).

### COVID-19 Questions

- **COVID-19 has had a significant impact on SouthGrow businesses –** 50% of SouthGrow respondents indicated that the pandemic had an effect on the health of their businesses with activity decreasing 'slightly' or 'significantly.' This result is 20% lower than the overall survey region. The majority (88%) were able to avoid permanently terminating staff, and 68% avoided temporary lay-offs.
- **Responses to COVID-19 –** SouthGrow business's most common reactions to COVID-19 was to shorten their hours of operations and support staff to complete professional development. Overall, these findings are in line with the total Southwest survey region results. Still, the SouthGrow region had the highest number of businesses that have not had to take any measures at 28%.
- **Short-term planning outlook if COVID-19 worsens –** 56% of respondents stated that they plan to continue with business as usual, while 16% indicated needing to take out loans or that they might have to lay-off additional staff.
- **Most SouthGrow businesses workforce surveyed cannot work remotely –** 64% of SouthGrow businesses surveyed indicated that none of their workforce was able to work remotely, 18% above that of the survey region.
- **Key workforce development activities taken during COVID-19 –** The most mentioned activities included; 'A re-evaluation of the skills required to support future operations,' 'future investment in skills development,' 'investigation of the skill gap amongst employees' and 'Committed to future investment in skills development for staff.'

- **Short-term hiring intentions within 12 months –** Firms are divided on their hiring plans, with 60% of SouthGrow businesses indicating that they do intend to hire new employees, compared to 52% for the entire survey region. Note, this does not include rehiring those that may have been laid off due to COVID 19.
- **In-demand occupations/positions:** The most commonly mentioned occupations were management, engineering, and sales/service occupations.
- **Level of satisfaction regarding workforce development –** 76% of SouthGrow businesses were either 'very satisfied' or 'somewhat satisfied' with the overall availability of qualified workers and availability of workers with the appropriate education, the highest satisfaction rates in the Study Area. However, 40% were dissatisfied with the availability of a trained local workforce, 36% with the availability of prime working-age people (25-54) and 28% with the availability of experienced workers.
- **Likelihood of staying in the region –** 52% of SouthGrow respondents indicated that difficulties with skilled labour retention or recruitment were 'very likely,' 'somewhat likely' or 'likely' to influence their decision to stay operating within the region. Indicating that for nearly half of SouthGrow businesses, access to talent is not likely to influence their decision to remain in their location 10% higher than the Study Area.

## 3.2 Job Seeker Survey

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.

### 3.2.1 Job Seeker Survey Part 1

An online survey was advertised to Job seekers in Southwest Alberta in March 2020. The survey ended with no responses recorded for SouthGrow. The following bullets offer a brief overview of the broader Study Area job seeker survey findings.

- **Job seekers' current job status:** The largest proportion of respondents are currently working in a management or a cashier/helper/labourer role, and 75% of them are making less than $35 an hour.
- **Job seekers view of the job market:** If respondents could work in any industry, 22% are not sure where they would like to work. 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.
- **Job seekers view the job search support system:** Jobseeker respondents 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. A large proportion of them use federal and provincial government websites to find relevant labour market information and do not work with an employment service organization.
- **Job seekers' view on skills and training**: A large portion of job seeker respondents feel 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.

### 3.2.2 Job Seeker Survey Part 2

The second release of the online survey was advertised to Job seekers in the SouthGrow Region in June 2020. The survey ended with 17 completed questionnaires, 16 of these from the Town of Taber. Respondents were asked about their perceptions of the local labour market and the available jobs in the SouthGrow Region.

While participation was low and cannot be interpreted to be representative of job seekers in SouthGrow, the following offers a brief snapshot of responses:

#### Implications of COVID-19

- 71% of respondents mentioned they are very likely or likely going to consider employment in occupations that they may not have considered in the past
    - This is 8% lower than the overall Study Area
- The most mentioned sectors seeing an increase in job postings post COVID-19 were food services (35%), healthcare (29%), and agriculture (24%)
- 41% of respondents feel no sectors had increased postings
    - This is 16% higher than the overall Study Area
- Furthermore, 24% of respondents are temporarily or permanently laid off, and 18% have had their hours reduced
    - This is comparable to 49% of respondents in the overall Study Area temporarily or permanently laid off, and 16% of respondents in the overall Study Area reporting reduced hours

#### Profile of Job Seekers:

- A large proportion (41%) of respondents are aged between 25-44 years old and would be considered a part of the core workforce in SouthGrow. 6% of respondents were over the age of 55
    - This is comparable to 45% of respondents aged 25-44 and 17% over age 55 in the overall Study Area
- 82% of respondents have lived in SouthGrow for longer than ten years. 59% of respondents have lived in the area for over 20 years
    - This is comparable in line with 75% of respondents in the Study Area who have lived in Southwest Alberta for longer than ten years
- 18% of respondents had a university degree, and 76% of respondents had education beyond a high school diploma.

#### Employment Characteristics of Job Seekers:

- 65% of respondents were employed during this timeframe of the second survey release
    - This is 18% higher than the overall Study Area (47%)
- 53% of respondents were seeking new/additional employment

- This is 22% higher than the overall Study Area

- 50% of respondents are considering moving out of the Southwest Alberta Region to secure employment
    - This is 3% lower than the overall Study Area (53%)
- 100% of respondents have been actively seeking employment for less than six months
    - Comparable to 62% in the overall Study Area

## Job seekers current job status:

- A large proportion of respondents are currently working in clerical/administrative roles (35%), healthcare (12%) or a machine operator/assembly role (12%)
    - The largest proportion of respondents in the overall Study Area are working in clerical/administrative roles (13%) and healthcare (13%)
- 83% of respondents are making less than $35 an hour
    - 82% of respondents are making less than $35/hour in the overall Study Area.

## Job seekers view of the job market:

- The majority of respondents feel there are "poor or fair" jobs that match their skillset (65%), opportunities to enhance their skillset (71%), relevant education programs (53%), and adequately paying jobs (71%)
    - Comparable to 75% of respondents in the overall Study Area rating poor or fair to jobs that match their skill set, opportunities to enhance their skillset (74%), relevant education programs (57%), employment assistance services (74%) and adequately paying jobs (74%)
- Most job seekers in SouthGrow mentioned the following sectors have a significant or somewhat of a factor in hindering their ability to get a job: A lack of suitable job opportunities (mentioned as a significant or somewhat of a factor by 82% of respondents) and a lack of adequately paying jobs (53%)
    - Within the overall Study Area, a lack of adequately paying jobs (70%) and a lack of suitable job opportunities (87%) were the factors most mentioned as significantly or somewhat hindering job seekers' ability to get a job.

## Job seekers view on the job search support system

- The majority of Jobseeker respondents rely on online job boards such as Indeed and Workopolis (88%), word of mouth (71%) and social media (47%) when looking for a job
    - Comparable to 82% of job seekers in the overall Study Area mentioning online job boards. 64% mentioning social media, and 54% mentioning word of mouth
- They also rely on job description information (mentioned by 56% of respondents), wage rates and benefits (mentioned by 61% of respondents) and employer websites (mentioned by 41% of respondents) to decide on their career paths. 22% of respondents expressed they have never used labour market information, tools, or services

- Comparable to 66% for job description information and 59% for employer websites, which are the most relied on information for respondents in the overall study to make career decisions

- A large proportion of them use federal (mentioned by 29% of respondents) and provincial (mentioned by 41% of respondents) government websites to find relevant labour market information and do not work with an employment service organization (100%)
  - Comparable to 42% of job seekers in the overall Study Area mentioning federal government websites, 39% mentioning provincial government websites and 32% mentioning colleagues.

### Job seekers view on skills, training, and local support:

- A large portion of job seeker respondents feel access to opportunities (mentioned by 65% of respondents) and skills training (mentioned by 41% of respondents) would help them achieve their full employment potential
  - Comparable to 79% for access to opportunities and 34% for career/employment counselling, which was the factor job seekers in the overall Study Area stated would help them achieve their full employment potential
- Many respondents also feel certifications (mentioned by 35% of respondents) and a college diploma (mentioned by 24% of respondents) would enhance their employability
  - Comparable to 48% for on the job training and 39% for professional designation, which were the factors that job seekers in the overall study mentioned would enhance their employability.

## 3.3 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. Eight interviews from the Town of Taber and Vulcan County are combined below to showcase perspectives separate from the City of Lethbridge.

### 3.3.1 Employers Point of View on the Local Regional Skills Gap

#### Availability of talent

Competition for most low-skilled labour is tight. 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. On the other hand, specific roles such as cleaners, janitors, workers in transport and health care workers seem to be easier to source.

If an employer is looking for specific skills, labour supply can be tighter, as some workers are less willing to venture into the area. For example, as skilled truck drivers retire, employers are finding it hard to find new, younger workers.

#### Training levels vary

Some concerns were expressed about the lack of literacy. The number of residents pursuing high school education is low compared to other regions. 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. This may be tied to the high pay and low formal education requirements in the oil sands.

Workers are also 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. An approach taken by the Health care industry is to uses a charge-back method where workers have to pay for training if they don't stick with the employer who funded the courses.

#### 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 commuters are not spending 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.

#### Disconnect in expectations related to the job description and accompanying salaries

While there are entry-level work opportunities that don't require experience, employers providing these opportunities feel younger workers that could take on these roles are not interested in manual-labour positions due to the nature of the work or the pay level. There is a perception in the community that younger workers do not have the same tolerance for manual labour positions and their accompanying salary as older workers had in the past.

Some workers, particularly those that had worked in the oil sands, have become accustomed to high rates of pay and would prefer to work in a service job than manual labour if the income is similar. Some employers also feel the new generation of workers is less 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.

### 3.3.2 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.

#### Job seekers feel 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. An example of a 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 who 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.

### 3.3.3 Education and Training – Challenges and Opportunities

#### Challenge – Build a bridge between business and education

Those who work in education and training believe 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 the industry should take care of their training and avoid the educational system. A stronger bridge needs to be built among the various players facing the challenges. Also, 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 a potential young Canadian-born worker 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.

#### Opportunity – Enhance work experience programs

The Registered Apprenticeship Program (RAP) 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 job seekers need to determine if they have a passion for the industry. 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.

## 3.4 Regional Roundtables

Six roundtables were conducted with a focus on industry, education, and immigration to facilitate input from representatives. Efforts were made to include geographic representation from each Study Area region. Discussions informed on the labour market situation and talent pipeline in the region.

### 3.4.1 Educator Roundtable

An education roundtable was conducted via Zoom to gather perspectives from education and training representatives, with a total of 12 individuals participating.  Key themes included:

- 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 primary 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

#### The top challenges educators are facing:

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

## Industry Roundtable

An Industry roundtable was completed with identified stakeholders throughout the region.

### Top Workforce Challenges Employers are Facing:

Lack of Soft Skills among staff

Wages and the high expectations of new graduates

Recruitment and 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

Continuous learning access and support

Transition Training

The ratio of new grads to retirees is concerning to several businesses, specifically in the trucking industry

- Micro credentialing, including a system of recognition of soft skills, was an area of interest for the employers
- 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 more accessible 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 a lower cost, particularly in LEAN Manufacturing
- Employers suggested making co-ops mandatory

### Positions Employers are having difficulty finding filling

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)
  - People who can code or do programming and design websites etc. and people who are competent using a computer and using software related to their job.

## 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 with new immigrants to the region. A total of 20 individuals participated in these sessions.

### Themes from the First Session with 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

### Themes from the Second Session with New Immigrants

- Newcomers are facing barriers in getting jobs and integrating into Southwest Alberta, including:
  - 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

# 4. Aligning Talent Supply and Demand

## 4.1 Local Labour force Gaps

This section examines the top 10 occupations employed in each identified industry sector, as well as the employment projections for these occupations, the skill level required according to Stats Canada, and the current pipeline of workers, to identify the labour skill gaps. This analysis only considers individuals graduating from post-secondary institutions in the Lethbridge Service Area, and high-school students enrolled in grade 12 in local schools. Occupations under the skill level A are matched to university graduate number, skill level B to college graduates, and skill level C and D are matched to the grade 12 enrollment number.

### 4.1.1 Renewable Energy

Based on retirements and economic activity, it is projected that the renewable energy sector will require a total of 39 new workers by 2025. Considering only the individuals graduating from post-secondary institutions in the Lethbridge Service Area, it is evident that if the graduate numbers trend continues, workers graduating just from Lethbridge College and the University of Lethbridge could meet the demand for workers in the top in-demand occupations in the renewable energy sector. However, it is recognized that graduates are mobile and may not remain in the community post-graduation. This suggests an opportunity to engage graduates further, and promote the assets of the region, as a means of retaining them upon graduation.

**Figure 16: Labour Demand – Renewable Energy**

| NOC | 2025 Projection Demand | Skill Level[3] |
|---|---|---|
| **Total (All NOC in Renewable Energy)** | **39** | **N/A** |
| **7244 Electrical power line and cable workers** | 3 | B |
| **2133 Electrical and electronics engineers** | 2 | A |
| **9241 Power engineers and power systems operators** | 2 | B |
| **0912 Utilities managers** | 2 | A |
| **1111 Financial auditors and accountants** | 1 | A |
| **7243 Power system electricians** | 1 | B |
| **1221 Administrative officers** | 1 | B |
| **6552 Other customer and information services representatives** | 1 | C |
| **2171 Information systems analysts and consultants** | 1 | A |
| **7511 Transport truck drivers** | 1 | C |

Source: metroeconomics | LERS Cubes | Alberta Open Data

[3] Based on the National Classification Code Skill Matrix, developed by the Government of Canada

### 4.1.2 Agricultural Manufacturing

The agricultural manufacturing sector will decline by a total of 40 workers by 2025; Nonetheless, some industries will experience a small growth in some occupations during the same period, including bakers, retail salespersons, and sales and account representatives – wholesale trade (non-technical). Considering only the unique individuals graduating from post-secondary institutions in the Lethbridge Service Area, and individuals enrolling in grade 12 in local high schools. It is evident that if the graduate numbers trend continues, the pipeline of workers could meet the demand for workers in the top in-demand occupations in the agricultural manufacturing sector if retained in the region.

**Figure 17: Labour Force Demand – Agricultural Manufacturing**

| NOC | 2025 Projection Demand | Skill Level |
|---|---|---|
| **Total (All NOC in Agriculture Manufacturing)** | **-40** | **N/A** |
| **6332 Bakers** | 7 | B |
| **6421 Retail salespersons** | 3 | C |
| **6411 Sales and account representatives - wholesale trade (non-technical)** | 2 | C |
| **7514 Delivery and courier service drivers** | 2 | C |
| **1431 Accounting and related clerks** | 1 | C |
| **6552 Other customer and information services representatives** | 1 | C |

Source: metroeconomics | LERS Cubes | Alberta Open Data

### 4.1.3 Other Manufacturing

Other manufacturing will decline by a total of six workers by 2025; Nonetheless, some sectors will experience a small growth in some occupations during the same period, including welders, and aircraft mechanics and inspectors. Considering only the unique individuals graduating from post-secondary institutions in the Lethbridge Service Area, and individuals enrolling in grade 12 in local high schools. It is evident that if the graduate numbers trend continues, the pipeline of workers could meet the demand for workers in the top in-demand occupations in the other manufacturing sector.

**Figure 18: Labour Force Demand – Other Manufacturing**

| NOC | 2025 Projection Demand | Skill Level |
|---|---|---|
| **Total (All NOC in Other Manufacturing)** | **-6** | **N/A** |
| **7237 Welders and related machine operators** | 5 | B |
| **7315 Aircraft mechanics and aircraft inspectors** | 4 | B |
| **7233 Sheet metal workers** | 3 | B |
| **9537 Other products assemblers, finishers and inspectors** | 2 | C |
| **7272 Cabinetmakers** | 2 | B |
| **9416 Metalworking and forging machine operators** | 2 | C |
| **7235 Structural metal and platework fabricators and fitters** | 1 | B |
| **2244 Aircraft instrument, electrical and avionics mechanics, technicians and inspectors** | 1 | B |
| **7321 Automotive service technicians, truck and bus mechanics and mechanical repairers** | 1 | B |
| **9612 Labourers in metal fabrication** | 1 | D |

Source: metroeconomics | LERS Cubes | Alberta Open Data

### 4.1.4 Tourism

The tourism sector will require 556 new workers by 2025. Most of these workers will be needed in occupations such as food counter attendants, kitchen helpers and related support occupations; food and beverage servers; and cooks. Most of these occupations do not require formal education, with some exceptions. Thus, considering only the unique individuals graduating from post-secondary institutions in the Lethbridge Service Area, and individuals enrolling in grade 12 in local high schools. It is evident that if the graduate numbers trend continues, the pipeline of workers could meet the demand for workers in the top in-demand occupations in the tourism sector.

**Figure 19: Labour Force Demand – Tourism**

| NOC | 2025 Projection Demand | Skill Level |
|---|---|---|
| **Total (All NOC in Tourism)** | **556** | **N/A** |
| **6711 Food counter attendants, kitchen helpers and related support occupations** | 116 | D |
| **6513 Food and beverage servers** | 83 | C |
| **6322 Cooks** | 66 | B |
| **0631 Restaurant and food service managers** | 52 | A |
| **6611 Cashiers** | 21 | D |
| **6311 Food service supervisors** | 21 | B |
| **5254 Program leaders and instructors in recreation, sport and fitness** | 19 | B |
| **6321 Chefs** | 18 | B |
| **6512 Bartenders** | 13 | C |
| **6511 Maîtres d'hôtel and hosts/hostesses** | 12 | C |

Source: metroeconomics | LERS Cubes | Alberta Open Data

### 4.1.5 Transportation, Logistics and Warehousing

The transportation, logistics and warehousing sector will require 350 new workers by 2025. Most of these workers will be needed in occupations such as transport truck drivers, material handlers, bus drivers/subway operators. Most of these occupations do not require formal education and can be filled with individuals with a high school diploma or less educational attainment.

Considering only the unique individuals graduating from post-secondary institutions in the Lethbridge Service Area, and individuals enrolling in grade 12 in local high schools. It is evident that if the graduate numbers trend continues, the pipeline of workers could meet the demand for workers in the top in-demand occupations in the transportation, logistics and warehousing sector.

**Figure 20: Labour Force Demand – Transportation Logistics and Warehousing**

| NOC | 2025 Projection Demand | Skill Level |
|---|---|---|
| **Total (All NOC in Transportation, Logistics & Warehousing)** | **350** | **N/A** |
| **7511 Transport truck drivers** | 82 | C |
| **7452 Material handlers** | 21 | C |
| **7512 Bus drivers, subway operators and other transit operators** | 19 | C |
| **0621 Retail and wholesale trade managers** | 13 | A |
| **1512 Letter carriers** | 10 | C |
| **6411 Sales and account representatives - wholesale trade (non-technical)** | 9 | C |
| **7513 Taxi and limousine drivers and chauffeurs** | 9 | C |
| **7514 Delivery and courier service drivers** | 8 | C |
| **1521 Shippers and receivers** | 8 | C |
| **0731 Managers in transportation** | 8 | A |

Source: metroeconomics | LERS Cubes | Alberta Open Data

### 4.1.6 Agriculture

The agriculture sector will require 135 new workers by 2025. Most of these workers will be needed in occupations such as managers in agriculture, general farmworkers, and retail and wholesale trade managers. Four of the top ten occupations by projected growth require a skill level A or B, which means university and college education, the rest in the list are occupations under the skill level C (occupations usually require secondary school and occupation-specific training).

Considering only the unique individuals graduating from post-secondary institutions in the Lethbridge Service Area, and individuals enrolling in grade 12 in local high schools. It is evident that if the graduate numbers trend continues, the pipeline of workers could meet the demand for workers in the top in-demand occupations in the agriculture sector.

**Figure 21: Labour Force Gaps – Agriculture**

| NOC | 2025 Projection Demand | Skill Level |
|---|---|---|
| **Total (All NOC in Agriculture)** | **135** | **N/A** |
| **0821 Managers in agriculture** | 32 | A |
| **8431 General farm workers** | 18 | C |
| **0621 Retail and wholesale trade managers** | 7 | A |
| **6411 Sales and account representatives - wholesale trade (non-technical)** | 5 | C |
| **8252 Agricultural service contractors, farm supervisors and specialized livestock workers** | 4 | B |
| **7312 Heavy-duty equipment mechanics** | 4 | B |
| **7452 Material handlers** | 4 | C |
| **6421 Retail salespersons** | 4 | C |
| **7511 Transport truck drivers** | 3 | C |
| **1521 Shippers and receivers** | 2 | C |

Source: metroeconomics | LERS Cubes | Alberta Open Data

## 4.1.7 Healthcare and Social Assistance

The healthcare and social assistance sector will require 1,070 new workers by 2025; the vast majority of this increase will take place in the city of Lethbridge. This sector will experience the most significant employment growth among all the key industries in the city of Lethbridge. Most of this growth will take place in occupations such as registered nurses and registered psychiatric nurses, nurse aides, orderlies and patient services associates, and social and community services workers.

Considering only the unique individuals graduating from post-secondary institutions in the Lethbridge Service Area, and individuals enrolling in grade 12 in local high schools. It is evident that if the graduate numbers trend continues, the pipeline of workers could meet the demand for workers in the top in-demand occupations in the healthcare and social assistance sector.

**Figure 22: Labour Force Demand – Healthcare and Social Assistance**

| NOC | 2025 Projection Demand | Skill Level |
|---|---|---|
| **Total (All NOC in Healthcare & Social Assistance)** | **1,070** | **N/A** |
| **3012 Registered nurses and registered psychiatric nurses** | 148 | A |
| **3413 Nurse aides, orderlies and patient service associates** | 117 | C |
| **4212 Social and community service workers** | 59 | B |
| **1414 Receptionists** | 44 | C |
| **4214 Early childhood educators and assistants** | 38 | B |
| **3233 Licensed practical nurses** | 36 | B |
| **1411 General office support workers** | 32 | C |
| **3112 General practitioners and family physicians** | 31 | A |
| **4411 Home child care providers** | 31 | C |
| **3411 Dental assistants** | 25 | C |

Source: metroeconomics | LERS Cubes | Alberta Open Data

## 4.2 Regional Skills Gap Analysis

The following figures depict workforce challenges and requirements in the region identified through stages of the project. The figures illustrate the challenges in General / Soft Skills, Specialized Skills, Technologies and Tools and Equipment and the sources through which they were identified. Rankings were determined through a weighted point system, Vicinity Jobs being allocated 3 points (3), Common Skills Matrix (2), Engagement Activities (1 for a mention in each activity for a possible total of 3), Trends (1). Key themes reiterated through these phases include the need to improve on soft skills (e.g., interpersonal skills), reducing the experience gap for new graduates entering the workforce, and providing more training and support to help individuals upskill. These can include introductory technology courses (e.g., Adobe Suite) or more specialized training for skilled trades and project management.

**Figure 23: Identified Workforce Challenges: General / Soft Skills**

| General / Soft Skills | | | | | |
|---|---|---|---|---|---|
| **Challenge Area** | **Engagement** | **Common Skills Matrix*** | **Trends** | **Vicinity Data** | **Points**** |
| Ability to Learn | Business Survey, Interviews, Workshops | Yes | Yes | Yes | 9 |
| Interpersonal Skills | Business Survey, Interviews, Workshops | Yes | Yes | Yes | 9 |
| Work Ethic | Business Survey, Interviews, Workshops | Yes | Yes | Yes | 9 |
| Computer Literacy | Business Survey, Workshops, Interviews | Yes | Yes | Yes | 9 |
| Communications Skills | Business and Job Seeker Survey | Yes | Yes | Yes | 8 |
| Time Management and Prioritization | Business Survey | Yes | Yes | Yes | 7 |
| Teamwork | Business Survey | N/A | Yes | Yes | 5 |
| Customer Service | Business Survey | Yes | N/A | Yes | 4 |
| Sales/Service Skills | Business Survey | Yes | N/A | Yes | 4 |

*Technical Report: Southwest Alberta Regional Skills Study Skills Gaps Analysis, Common Skills Matrix ** Rankings were determined through a weighted point system Vicinity Jobs (3), Common Skills Matrix (2), Engagement Activities (1 for a mention in each activity for a possible total of 3), Trends (1).

**Figure 24: Identified Workforce Challenges: Specialized Skills**

| Specialized Skills | | | | | |
|---|---|---|---|---|---|
| **Challenge Area** | **Engagement** | **Common Skills Matrix*** | **Trends** | **Vicinity Data** | **Total**** |
| Analytical Skills | Business Survey, Interviews, Workshops | Yes | Yes | Yes | 9 |
| Budgeting | Business Survey | Yes | N/A | Yes | 6 |
| Project Management | Business Survey | Yes | N/A | Yes | 6 |
| Skilled Trades | Business Survey, Interviews | Yes | Yes | N/A | 5 |
| Report Writing | N/A | Yes | N/A | Yes | 5 |
| Marketing | N/A | Yes | N/A | Yes | 5 |
| Ability to operate agricultural equipment | Interviews | Yes | Yes | N/A | 4 |
| Training/Teaching | N/A | Yes | Yes | Yes | 4 |
| Maintain Equipment | Business Survey | Yes | N/A | Yes | 4 |
| Maintain Financial Records | Business Survey | Yes | N/A | Yes | 4 |
| Management/Leadership skills | Business Survey | Yes | Yes | N/A | 4 |
| Inventory Management | N/A | N/A | N/A | Yes | 3 |
| Food Service | Business Survey | Yes | N/A | N/A | 3 |
| Electricians | Business Survey, Workshops | N/A | N/A | N/A | 2 |
| Millwrights | Business Survey, Interviews | N/A | N/A | N/A | 2 |
| Plumbing | Business Survey, Interviews | N/A | N/A | N/A | 2 |
| Engineering | Business Survey, Workshops | N/A | N/A | N/A | 2 |
| Safety Training | Business Survey | N/A | N/A | N/A | 1 |
| Ability to operate construction equipment | Interviews | N/A | N/A | N/A | 1 |
| Heavy Equipment Technician | Business Survey | N/A | N/A | N/A | 1 |
| Mechanics | Business Survey | N/A | N/A | N/A | 1 |
| Animal Husbandry | Business Survey | Yes | N/A | N/A | 1 |
| Graphic Design | Business Survey | N/A | N/A | N/A | 1 |
| Carpentry Skills | Business Survey | N/A | N/A | N/A | 1 |
| Accounting | Business Survey | N/A | N/A | N/A | 1 |
| Culinary Skills | Business Survey | N/A | N/A | N/A | 1 |
| Welding | Business Survey | N/A | N/A | N/A | 1 |

*Technical Report: Southwest Alberta Regional Skills Study Skills Gaps Analysis, Common Skills Matrix ** Rankings were determined through a weighted point system Vicinity Jobs (3), Common Skills Matrix (2), Engagement Activities (1 for a mention in each activity for a possible total of 3), Trends (1).

**Figure 25: Identified Workforce Challenges: Technologies**

| Technologies | | | | | |
|---|---|---|---|---|---|
| **Challenge Area** | **Engagement** | **Common Skills Matrix*** | **Trends** | **Vicinity Data** | **Total**** |
| Technical Skills (Comfort using machinery) | Industry Sessions, Business Survey, Job Seeker Survey | Yes | Yes | Yes | 9 |
| General Labour | Business Survey, Workshops, Interviews | Yes | Yes | Yes | 9 |
| Ability to communicate in English | Workshops, Business Survey | Yes | Yes | Yes | 8 |
| Microsoft Office Suite | N/A | Yes | Yes | Yes | 6 |
| Driver Licenses and Certification | Business Survey, Workshops, Interviews | Yes | Yes | N/A | 6 |
| Adobe Suite (Photoshop) | N/A | N/A | N/A | Yes | 4 |
| LEAN Manufacturing | Workshops, Business Survey, Interviews | N/A | Yes | N/A | 4 |
| Critical thinking and problem-solving skills | N/A | Yes | Yes | N/A | 3 |
| Technical Skills (Comfort using machinery) | Industry Sessions, Business Survey, Job Seeker Survey | Yes | Yes | Yes | 9 |
| Data and statistical analysis | Business Survey | Yes | N/A | N/A | 3 |
| Recruiting/Hiring | N/A | Yes | N/A | N/A | 2 |
| Purchasing | N/A | Yes | N/A | N/A | 2 |
| Computer Programming | Business Survey | N/A | N/A | N/A | 1 |
| Robotics Expertise | Interviews | N/A | N/A | N/A | 1 |

*Technical Report: Southwest Alberta Regional Skills Study Skills Gaps Analysis, Common Skills Matrix ** Rankings were determined through a weighted point system Vicinity Jobs (3), Common Skills Matrix (2), Engagement Activities (1 for a mention in each activity for a possible total of 3), Trends (1).

**Figure 26: Identified Workforce Challenges: Tools and Equipment**

| Tools and Equipment | | | | | |
|---|---|---|---|---|---|
| **Challenge Area** | **Engagement** | **Common Skills Matrix*** | **Trends** | **Vicinity Data** | **Total**** |
| Forklifts | N/A | N/A | N/A | Yes | 3 |
| Power Tools | N/A | N/A | N/A | Yes | 3 |
| Conveyors | N/A | N/A | N/A | Yes | 3 |
| Boilers | N/A | N/A | N/A | Yes | 3 |
| Skid steers | N/A | N/A | N/A | Yes | 3 |
| Disposal units | N/A | N/A | N/A | Yes | 3 |
| Lawnmowers | N/A | N/A | N/A | Yes | 3 |

*Technical Report: Southwest Alberta Regional Skills Study Skills Gaps Analysis, Common Skills Matrix ** Rankings were determined through a weighted point system Vicinity Jobs (3), Common Skills Matrix (2), Engagement Activities (1 for a mention in each activity for a possible total of 3), Trends (1)

# 5. Strategic Directions

This strategic plan is the culmination of all research, analysis, and community stakeholder input. While each pillar offers a series of objectives and tactical actions, they are designed to work in concert, each building on and influencing the overall impact towards addressing identified labour force challenges and skills gaps in the Study Area.

### 5.1.1 Pillar 1: Labour Market Information

Access to relevant and recent LMI is paramount to informed decision making. Regional service providers, residents, businesses, and academia all need to be current in their knowledge and understanding of what is happening in the labour market, both locally at the community level, regionally, and beyond. Keeping informed on provincial policies and their implications, economic shifts, employment and unemployment activity, employer hiring or downsizing, enrollments all support the identification of challenges, opportunities, trends, and priorities. Making this information available in a clear, concise, and useable manner expands knowledge to employers, job seekers, students, businesses, local intermediaries, and governments. It also supports opportunities for greater collaboration and collective efforts to prioritize and respond promptly.

It has been long identified in Canada that access to local labour market information is still challenging, even though our labour market intelligence (LMI) system is recognized as one of the best in the world[4].

In the Study Area, employer and job seeker needs and education pipeline data are not broadly understood, not easily accessible, or consolidated for easy access. Completed employer surveys, interviews, and the talent pipeline analysis all illustrated gaps.

The majority of job seekers surveyed indicated a lack of suitable job opportunities in the region. In contrast, nearly half of all businesses surveyed indicated a lack of suitable applicants. These perceptions indicate that a gap exists between supply and demand for labour that may be addressed through better LMI.

An essential aspect of this pillar is establishing a centralized, shared, and accessible platform for data that is currently being collected by the members of the partnership, or through established and credible organizations that focus on LMI collection and dissemination. One such organization is the newly formed Labour Market Information Council, which would serve as a great resource and potential link from a regional LMI site. The next step is collecting data to fill gaps, including alumni tracking, improving LMI literacy, job postings and relevant data that can be extracted, and simplifying the language and methods used to communicate skills proficiencies or deficits. Understand that different audiences, such as job seekers and employers, require a different approach than researchers, institutions, and government. It is not merely putting information on a website, instead of disseminating it in a manner that can be used.

There was a wide variety of perceptions of which skills existed and were needed in the workforce that clashed with available data. Stakeholders indicated they would like to have access to better information.

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[4] Advisory Panel on Labour Market Information; Working Together to Build a Better Labour Market Information System for Canada Final Report, May 20, 2009;

## 5.1.2 Pillar 2: Talent Retention

Demand for talent, particularly specialized talent, is growing, locally, regionally, and worldwide. It is recognized that COVID 19 has slowed this demand in select geographies and sectors due to the economic fallout and business closures. However, to remain competitive in the battle for talent, it is necessary to remain vigilant and responsive to identified talent needs. Talent retention demands proactive and thoughtful consideration of targeted strategies that support an evidence-based understanding of what talent is needed, what talent is available and the influencing factors that support talent retention and skills development. Significant efforts will be necessary to ensure that local talent remains in the area, beginning with those who come to the region for education and migrants. As with business retention, there is a greater return on investment to keep workers in the area than attract new workers. The region is projected to see population growth over the coming years, which creates an opportunity to further build the available labour pool, through retention and attraction. The assets of the region can play a significant influencing role in that regard.

A significant component of retention is aligning the workforce with jobs available now and through sector growth into the future. This spans occupations across all skill levels, and all who chose to be active in the labour market. Communities can improve retention by improving access to reskilling, retraining, workplace integration, and workforce readiness services.

A survey conducted by Lethbridge College indicated that 6-months post-graduation, 51% of graduates were no longer living in the Lethbridge area. The local labour pool attracted to the University of Lethbridge and Lethbridge College represents the most promising long-term pipeline of talent into the region. Efforts to integrate this population into the community and strengthen their exposure to life in Southwest Alberta may prove favourable and support retention.

Engaging broader community support to facilitate experiential learning prospects such as co-ops and internships to link graduates to local businesses is a prime opportunity. These may include maker spaces, familiarization tours, and hands-on learning at the secondary and post-secondary level, further exposing students with the community and providing local employers with the opportunity to interact with potential future employees.

Employers have indicated they want to participate in experiential learning, but they perceive the current programs as onerous. Educational institutions can benefit from understanding the barriers experienced by employers and students and strengthening the process to achieve positive outcomes. These efforts support talent retention.

### 5.1.3 Pillar 3: Skills Alignment

At the core of an aligned labour market is the need to ensure that those skills, competencies, and abilities that employers are seeking are present in the labour force. Where specific skills are absent, the role of local post-secondary and training providers is amplified. Talent readiness to enter the labour market, to transition within the labour market, and to remain current in skills, knowledge, and abilities support a community's competitiveness and attraction for both business and labour force participants. This benefits from a deep alignment between education and trainers and employers. Employers are best positioned to inform what skills they need and where the gap exists within the existing labour force. Educators are well-positioned to be responsive to these needs and create an opportunity for skills development and upskilling.

There has been a significant workforce shift over the last few decades wherein employers are less willing or able to train entry-level employees. A growing share of the responsibility for training falls to individuals, and educational institutions must be responsive. Combine this trend with the lower direct employment experience of recent graduates; it is not surprising the most commonly identified labour force gaps with new graduates was lack of experience. Based on the research, this was followed closely with the lack of soft skills.

A significant challenge identified by employers was the relatively slower pace that education institutions could adapt their programming to support the integration of newer technology. Given the recent rise in the use of technology to carry out business as a result of COVID, the importance of a responsive strategy to improve on technology use and technology learning rises in importance.

Preparing the next generation of Alberta workers starts with integrating work and learning. As automation erodes entry-level jobs, companies will expect students to mix higher-level technical and soft skills. [5] Addressing the skills gap ensures a focus is placed on the specificity for skills development, through responsive and flexible learning channels and credentialing.

One issue raised through interviews and workshop sessions was the lack of commonly understood terminology to describe soft skills and non-work skills experience. A component of this project has been developing skills profiles of top occupations projected to be in demand over the next five years. Building on these profiles, it would be helpful to continue to articulate the specific skills required and to ensure clear communication of this insight to those looking to develop or enhance their skills. These profiles lay the groundwork to develop career pathways, skills transferability, and employer identified skills needs. They may also inform on programming development, the introduction of micro-credentialing, or programming updates.

[5] https://coppoa.ca/; accessed 8-31-2020

### 5.1.4 Pillar 4: Talent Attraction

A key factor impacting the ability of businesses to recruit talent successfully is the narrative and persona of the community and surrounding region. The Study Area, and particularly the smaller communities within, has recognized challenges to attracting residents, who are often active participants in the labour market. This amplifies the necessity of a reflective and common message that showcases the area and all it has to offer. A clearly stated value proposition supports consistent communication that can be utilized by local employers in the promotion of their business and their employment opportunities. Part of this message should showcase the success stories of those that have chosen the region and the assets that drew them to the area.

Communities are encouraged to utilize existing professional associations, established entrepreneurs, employment support organizations, and other networks to connect newcomers with those that call the region home. This is an essential aspect of promoting a welcoming community.

Documenting and sharing with employers' best practices in modernizing workplaces and adapting to the needs of the changing labour market reflects input received through the consultation process. This could include best practices addressing ESL/Language and cultural barriers, which were the most mentioned factors to businesses hiring immigrant workers. These businesses' best practices are critical as they were the most preferred method identified by employers on engaging with further immigration support information.

The Registered Apprenticeship Program (RAP) was viewed as a complementary program that helps build a connection between youth, educational institutions, and employers, providing the all-important on-the-job experience job seekers need explore career pathways. There were negative aspects of RAP (e.g., transportation challenges for apprentices, higher insurance costs for employers), but the benefits outweigh the burden.

# 6. Moving from Strategy Development to Action

This skills study has resulted in identifying common themes emerging through the data analysis and the engagement undertaken over the lifecycle of the project. It is this evidence that grounds the formation of a strategic plan to respond to the emerging priorities and advance Southwest Alberta towards a more balanced labour market. While the emphasis is placed on validating what skills gaps exist, and how that might be addressed, other priorities were also identified as requiring attention. In total, the strategy presents four independently important foundation pillars, and collectively they are necessary to achieve the desired goal, that being an aligned labour market.

In the regional strategy a series of thirteen objectives are offered as recommendations with tactical actions applied to support implementation and impact. Actions have been assigned a timeline that informs on which actions should move forward in the short (0-12 months), medium (2-3 years) , and longer-term (4-5 years). Actions have also been identified as regional (R), local (L) or both and assigned an estimated cost $ (0-$5,000), $$ ($5,001 -$10,000 and $$$ ($10,001+). Again, it is important to take into consideration changes in the economy and the region, as this may shift timelines for implementation.

In its simplest form, this strategic plan addresses the disconnect between labour supply and labour demand. It articulates and informs on existing skills gaps and the vital role post-secondary institutions and local training providers can play in bridging this gap. For the region to remain competitive, a proactive, evidence-informed approach must be utilized to ensure the labour force is best positioned to contribute actively. This means employers can access talent with the skills necessary to perform services or create products, and job seekers recognize and respond to the assets that make Southwest Alberta a place they are happy to call home.

It is important to note that this must be fluid, as unforeseen circumstances will drive the necessity to review the strategy regularly to validate its relevance. Never has this been more evident than in current times, where COVID forced the shutdown of many local economies and shifted the tight labour market to one that saw record unemployment rates.

## Pillar 1: Labour Market Information

| Objective #1 | Develop a Comprehensive, Central and Current Labour Market Information System | Priority Timing | | | Cost | Scale |
|---|---|---|---|---|---|---|
| | | S | M | L | $ | L&R |
| Action #1 | Support the development of or contribute to a regional/community business database to support future business outreach and engagement. (Business database developed through this initiative will be shared as a starting point). | ✓ | | | $$ | L&R |
| Action #2 | Establish a supported process to collect and analyze relevant enrollment and graduation data across all educational institutions to inform program planning, emerging trends, and maintain insight for the local talent pipeline.<br><br>To support this initiative, it is recommended that an Education Roundtable be tasked with identifying relevant data points and follow-through. | | ✓ | | $ | R |
| Action #3 | Conduct an annual/bi-annual business survey to monitor workforce challenges and employer talent needs.<br><br>This information can be disseminated through the LMI website, infographics, and social media messaging to keep both labour supply and businesses informed.<br><br>Example: www.niagararegion.ca/projects/employment-inventory/default.aspx | | ✓ | | $$ | R |
| Action #4 | Track metrics on businesses hiring new graduates, and co-op and internship programming and promote success stories. These metrics raise awareness and encourage businesses to engage with these programs and should be reported by employers and education institutions. | | ✓ | | $ | R |
| Action #5 | Develop, maintain and promote local labour market information at the regional and community level to inform on critical data such as # of job postings, types of occupations in demand, employers who are hiring, skills and education levels in demand, etc.<br><br>Example: www.worktrends.ca | | | ✓ | $$ | L&R |

| Objective #2 | Disseminate Relevant LMI to Inform Decisions and Promote Opportunity | Priority Timing | | | Cost | Scale |
|---|---|---|---|---|---|---|
| | | S | M | L | $ | L&R |
| Action #6 | Promote knowledge sharing with educators (targeting career classes), employers, and job seekers to highlight and build awareness of relevant | ✓ | | | $ | L&R |

| | | | | | | |
|---|---|---|---|---|---|---|
| | economic and labour market activity. This may be facilitated through infographics, videos, or social media. | | | | | |
| Action #7 | Develop a dedicated webpage on existing partner sites to present workforce development trends, demand, and policy changes; offer links to relevant and credible LMI sites such as LMIC, Statistics Canada, Conference Board of Canada. Enhance the inventory of information and services accessible through this new resource, explicitly highlighting specific demand sectors. Where possible, link these pages to maintain consistent messaging and updates. | | ✓ | | **$$** | **L&R** |
| Action #8 | Develop/Share New and Existing training resource guides for job seekers and students that showcase career pathways to high demand occupations and local training options and micro-credentialing that support necessary skills and knowledge development and credentials. The guide should clearly outline the career paths, educational requirements, local training options, available resources, assistance, and potential grants. | | ✓ | | **$$** | **L&R** |

## Pillar 2: Talent Retention

| **Objective #3** | **Foster Work Integrated Learning** | **Priority Timing** | | | **Cost** | **Scale** |
|---|---|---|---|---|---|---|
| | | **S** | **M** | **L** | **$** | **L&R** |
| Action #9 | Support and enhance work-integrated learning opportunities such as co-ops and internships to strengthen graduate and local employer relations.<br>This may begin with documenting all programming with a work integrated component, examining potential occupations common for each program; explore these occupations against projected growth occupations to promote opportunities for employment upon graduation. | ✓ | | | **$$** | **R** |
| Action #10 | Continue to streamline processes for employers and students to participate in work integrated learning opportunities to maximize participation and improve participant experiences.<br>This may help reduce steps, utilize technology to support access, and enhance customer (student and employer) satisfaction with the experience. | ✓ | | | **$** | **L&R** |
| Action #11 | Work with secondary schools to integrate practical shop classes that include job camps, job shadowing, guest speakers, pre-apprenticeship programs, and programs to showcase alternative learning pathways and career exploration opportunities. | | ✓ | | | **L** |

| | | | | | | |
|---|---|---|---|---|---|---|
| Action #12 | Continue to engage local business associations and local businesses to promote and encourage experiential work term opportunities (internships, co-ops, apprenticeships) to increase participation and career awareness for local secondary and post-secondary students.<br><br>This initiative will also support the integration of students new to the area into the community to expose them to life in the region. | ✓ | | | | **L&R** |
| Action #13 | Consider creating a welcome package bundle for students who relocate to the region for school. This package could include discounts for local services (e.g., community gyms, pools, etc.), local deals from businesses, and more.<br>Collaboration with the business community to develop appropriate incentives is advised. Investigate creating a promotion campaign highlighting the package and sense of community across the region. | ✓ | | | **$** | **R** |
| **Objective #4** | **Create In-depth Awareness of Local Careers** | **Priority Timing** | | | **Cost** | **Scale** |
| | | **S** | **M** | **L** | **$** | **L&R** |
| Action #14 | Host "familiarization tours" with local businesses experiencing growth to expose faculty members, career counsellors, and administration from local educational institutions to local workplaces. These tours should be tailored to educators and foster education – business relations.<br>This strengthens educators understanding of how workplaces have changed over time and promotes economic sectors in the region. | | ✓ | | **$** | **L** |
| Action #15 | Work with businesses to elevate their status in the community by inviting educational providers, locals, and students to experience their workplaces through scheduled tours or career days. These open houses can forge stronger connections between academia and employers, promoting understanding of local opportunities. | | ✓ | | **$$** | **L** |
| Action #16 | Explore the establishment of a Speakers Bureau made available to educators who wish to invite local business representatives into the classroom to share career pathways and work experiences with students. This promotes the diversity of employment opportunities in the region and demonstrates the importance of education and experience in career advancement. | | ✓ | | **$$** | **L&R** |
| **Objective #5** | **Retain Graduates** | **Priority Timing** | | | **Cost** | **Scale** |
| | | **S** | **M** | **L** | **$** | **L&R** |
| Action #17 | Promote mentorship programming for businesses and educational institutions to foster graduate connections within the community, sectors or local business. | ✓ | | | **$** | **LR** |

| | | S | M | L | Cost | Scale |
|---|---|---|---|---|---|---|
| | This further supports knowledge exchange, career exploration, and skills development. | | | | | |
| Action #18 | Develop and deliver training for employers to increase knowledge and share strategies for managing diverse and multi-generational workplaces. | ✓ | | | **$$** | **L&R** |

| **Objective #6** | **Support Business Talent Retention Efforts** | **Priority Timing** | | | **Cost** | **Scale** |
|---|---|---|---|---|---|---|
| | | **S** | **M** | **L** | **$** | **L&R** |
| Action #19 | Continue to work with businesses to promote existing provincial and federal COVID-19 recovery initiatives to rehire workers. | ✓ | | | **$** | **L&R** |
| Action #20 | Collate best practice research on modernizing workplaces, staff retention techniques, and local good news stories and share these findings with local businesses to illustrate how they should adapt to retain talent. Key findings can be shared online via the workforce development microsite or through workshops. | | ✓ | | **$** | **L&R** |
| Action #21 | Support employers and employees in the transition to remote work through research of best and promising practices and review of broadband connectivity across the region to ensure it meets businesses and employee requirements.<br>Example: WORKShift (see KPMG book - Workshift: Future-Proof Your Organization for the 21st Century) | ✓ | | | **$** | **R** |
| Action #22 | Explore the feasibility of a public-private recruitment coalition to formalize and share talent recruitment and retention strategies, align messaging and strengthen local talent alignment.<br><br>Example: Greater Halifax Partnership Connector Program halifaxpartnership.com/how-we-help/grow-your-business/connect-to-talent/ | | ✓ | | **$$** | **L&R** |

## 6.1 Pillar 3: Skills Alignment

| Objective #7 | Develop Accessible Training Programs | Priority Timing | | | Cost | Scale |
|---|---|---|---|---|---|---|
| | | S | M | L | $ | L&R |
| Action #23 | Work with local education providers and the private sector to promote upskilling courses (e.g., the University of Lethbridge's Renewable Resource Management Courses, or courses available through the Collaborative Centre of Excellence (CCoE) in People Development at Lethbridge College) to help workers successfully transition into occupations that are in higher demand or sectors experiencing growth.<br>Promote utilization of Prior Learning Assessment Recognition (PLAR) to support student assessments to minimize separation from the workforce. | ✓ | | | $ | R |
| Action #24 | Target development of micro-credentialing upskilling programs that educate on key technology (manufacturing and agricultural equipment) and LEAN manufacturing. These courses can range from beginner to advanced and should be developed in conjunction with local industries and educational institutions to ensure skills are relevant in the workplace. | ✓ | | | $ | R |
| Action #25 | Foster increased on-line learning opportunities within credited and non-credit programming to maximize access and support varied learning styles among students and students in remote areas.<br><br>This will further support learning through COVID recovery. | ✓ | | | $$ | L&R |
| Action #26 | Explore the expansion of the University of Lethbridge's THRIVE Professional Skills Program to support a wide-reaching workforce readiness program accessible to non-university students, including the general labour force population. | ✓ | | | $$ | L |

| Objective #8 | Support Career Development and Upskilling | Priority Timing | | | Cost | Scale |
|---|---|---|---|---|---|---|
| | | S | M | L | $ | L&R |
| Action #27 | Working with educational institutions investigate employers understanding of soft skills (employability skills) to ensure appropriate measures are being taken to build these skills among students at all levels of the education system.<br><br>This may be achieved through the annual survey of employers to keep current with workforce-related issues and employer solutions. | | ✓ | | $$ | L&R |
| Action #28 | Develop a pilot project to support employability skills development among select students through a customized program designed to provide an in-class learning component and a work-integrated learning placement.<br>Program outcomes should be measured to demonstrate pre and post-project results. | | ✓ | | $$$ | R |

| | | S | M | L | $ | L&R |
|---|---|---|---|---|---|---|
| Action #29 | Work with local education institutions to support dual credit programming between colleges and secondary schools through the development and dissemination of relevant information about occupations in high demand. Example: Ontario's Specialist High Skills Major programming (www.ontario.ca/page/specialist-high-skills-major#:~:text=The%20Specialist%20High%20Skills%20Major%20(%20SHSM%20)%20is%20a%20specialized%20program,Ministry%20of%20Education%20approved%20program) | | | ✓ | $$ | L&R |
| Action #30 | Support the development of deeper alignment between local school boards, colleges, and universities and employers, ensuring students, graduates, and teachers understand career paths and required skills.<br><br>Consider the formation of a Talent Supply Table to foster regular discussions and information sharing. | | ✓ | | $ | L&R |
| **Objective #9** | **Support the Integration of the Immigrant Workforce** | **Priority Timing** | | | **Cost** | **Scale** |
| | | **S** | **M** | **L** | **$** | **L&R** |
| Action #31 | Promote the immigrant labour pool as a significant source of labour, sharing local business success stories. This work would be carried out in collaboration with local immigrant service organizations. | ✓ | | | $ | L |
| Action #32 | Connect businesses with immigrant services providers and support transitional employment programming for new immigrants that include ESL and cultural training. | ✓ | | | $ | L |
| **Objective #10** | **Embrace and Build Technology Capacity** | **Priority Timing** | | | **Cost** | **Scale** |
| | | **S** | **M** | **L** | **$** | **L&R** |
| Action #33 | Improve the use of technology to streamline the process of accessing training for remote employers and students. | | ✓ | | $$ | L&R |
| Action #34 | Support the employer's capacity to hire and manage remote workers. | ✓ | | | $ | L&R |
| **Objective #11** | **Support the Integration of Indigenous Talent** | **Priority Timing** | | | **Cost** | **Scale** |
| | | **S** | **M** | **L** | **$** | **L&R** |
| Action #35 | Work with Indigenous Governments and Economic Development Agencies to share LMI data and opportunities. | ✓ | | | $$ | L&R |
| Action #36 | Connect businesses with Indigenous service providers that support the development of welcoming workplaces. | ✓ | | | $ | L&R |
| Action #37 | Improve Indigenous access to skills training and upskilling programming by specifically targeting/recruiting the Indigenous community and provide information on specific support programming available. | ✓ | | | $ | L&R |

## 6.2 Pillar 4: Talent Attraction

| Objective #11 | Promote Welcoming Communities | Priority Timing | | | Cost | Scale |
|---|---|---|---|---|---|---|
| | | S | M | L | $ | L&R |
| Action #34 | Develop and disseminate a unified brand that supports local and regional talent attraction and retention. Consider the information that highlights housing, education, lifestyle, affordability, diversity, etc.<br><br>Resource to be used across organizations, local businesses, and stakeholder groups to promote the region with a standard message to strengthen and consistently reflect the local brand and welcoming nature. | | ✓ | ✓ | $$ | R |
| Action #35 | Continue economic development efforts on diversifying and growing the economy (e.g., renewable sector) to grow the overall number of jobs in the region. Focus on areas that create long term, meaningful employment opportunities. | | ✓ | | $ | L&R |
| Action #36 | Create a targeted marketing campaign encouraging skilled workers to relocate to the region. Provide materials and support to businesses that are recruiting talent. | | ✓ | | $$ | L&R |
| Action #37 | Continue to work with local employers and employees who recently moved to the region and successfully promote their positive experiences via online and offline channels. | | ✓ | | $ | L |

| Objective #12 | Foster Business Culture, Inclusiveness and Diversity | Priority Timing | | | Cost | Scale |
|---|---|---|---|---|---|---|
| | | S | M | L | $ | L&R |
| Action #38 | Encourage businesses to promote corporate culture as a company benefit and a key consideration for potential employees. Focus on leveraging regional brand, local assets, employer perks, workplace culture, incentives, and inclusive practices.<br><br>This may be in the form of an employer guide, webpage, or a publication that depicts the return on investment. | ✓ | | | $ | L&R |
| Action #39 | Document and share best and promising practices for employers to showcase tangible approaches to creating and adapting to a flexible workplace. | | ✓ | | $ | L&R |

| | | | | | | |
|---|---|---|---|---|---|---|
| Action #40 | Utilize on-line resources designed to guide stronger inclusiveness[6], and share with employers to foster the concept of a "welcoming and inclusive workplace culture" among businesses to promote diversity in the workplace. | | ✓ | | **$$** | **L&R** |
| Action #41 | Consider creating a welcome package bundle for workers who relocate to the region for work. This package could include discounts for local services (e.g., community gyms, pools, etc.), local deals from businesses, and more. Collaboration with the business community to develop appropriate incentives is advised. Investigate creating a promotion campaign highlighting the package and sense of community across the region. | ✓ | | | **$** | **L&R** |

## Tools and Projects Active in the Region

Member of the Southwest Alberta Skills Partnership have identified tools and projects active in the region that support the objectives and actions.

1. Lethbridge Brighter Together Brand: chooselethbridge.ca/userfile/file/Brighter%20Together%20Business%20Health%20Infographic.pdf
2. Choose Lethbridge is currently working with: Career Transitions www.careersteps.ca/
3. Choose Lethbridge is currently tracking graduate by program band: chooselethbridge.ca/?p=0&action=table&subaction=view&ID=1613

[6] See for example: https://www.shrm.org/hr-today/news/hr-magazine/0418/pages/6-steps-for-building-an-inclusive-workplace.aspx; https://business.linkedin.com/talent-solutions/blog/diversity/2017/50-ideas-for-cultivating-diversity-and-inclusion-in-the-workplace

## 6.3 Local Assets Inventory

A lifestyle asset inventory was conducted for the broader Study Area, excluding the city of Lethbridge. Data from D&B Hoovers was used to assess the number and type of amenities available within the region. As talent becomes more mobile and jobs are less location-specific, the quality of life a community can offer is a more significant factor in the recruitment and retention of labour. Beyond job opportunities, more attention is now given to understanding the influencing factors of quality of life, including affordable housing, transportation and walkability, tourism and cultural assets, post-secondary and life-long learning accessibility, health care, school, social and sports programming for children. The Study Area has a wide variety of lifestyle assets that present a significant opportunity to showcase the value proposition of the region as a component of the talent attraction and retention effort.

The lifestyle assets examined in the Study Area in Southwest Alberta (not including the city of Lethbridge) include health care amenities (78), education institutions (92), social services (39), cultural and recreational assets (52), and environmental assets (5). The number of each of these asset categories indicates that the region offers a relatively small variety of services and opportunities for residents outside the city of Lethbridge. These communities need to leverage these assets to be competitive and being able to attract and retain the talent required to meet the demand for workers in the future.

**Source Note:** Data for this report has been sourced from D&B Hoovers, which maintains the world's largest commercial database from Dun & Bradstreet[7]. The Categories in this report correspond with the 2017 North American Industry Classification System (NAICS). This industry classification system was developed by the statistical agencies of Canada, Mexico and the United States[8].

[7] D&B Hoovers, dnb.com/products/marketing-sales/dnb-hoovers.html

[8] Stats Canada NAICS Codes, statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=1181553

# 7. Conclusion

The Southwest Alberta Regional Skills Study Partnership was formed to provide leadership and direction to address regional skills and competency gaps and explore strategic approaches to best position greater supply and demand alignment. The Partnership has recognized that local and regional competitiveness is significantly influenced by the business's ability to access the talent and skills needed to deliver products and services. In this ever-changing global environment, access to talent is no longer constrained by geography, rather ease of mobility and the speed at which technologies are transforming sectors, processes, and strategies are further influencing where talent works and lives. As a result of COVID-19, many communities are experiencing a slowdown or stall in the economy, while the labour force is seeing increased unemployment rates and displacement from the labour market. It is still unclear how long these disruptions will last, nor do we fully understand the implications and fall out. Communities that are being proactive and thinking longer-term will be best positioned to respond accordingly.

The convergence of workforce and economic development has also evolved in recent years. Recognition that a community's strongest asset is its talent pool is now guiding economic activity such as investment, site selection, and business expansion.[9] Where once serviced land was the key driver for investment interest, today, this is being upstaged by the availability of talent and the capacity through which communities can support talent development. Southwest Alberta is strongly positioned in talent development, with its post-secondary institutions being an attractor of students pursuing post-secondary education. Additionally, the region offers significant benefits that influence the quality of life, a second key factor that influences the job seeker decision on where to live.

This strategy positions Southwest Alberta to be responsive and proactive to the opportunities that will influence the capacity and capability to not only build the talent needed to drive local competitiveness but to attract and retain the talent necessary to fill those difficult-to-fill vacancies. Through a collaborative and collective effort, the Southwest Alberta Regional Skills Study Partnership, with the inclusion of additional partners that may choose to come to the table, has the roadmap to forge ahead with a future-focused plan that will support its communities and the region as a whole.

[9] https://aboutdci.com/2018/03/episode-40-next-practices-site-selection-insights-site-selectors-guild/; accessed 9-22-2020