AUGUST 2021

FORT MCMURRAY WOOD BUFFALO
LABOUR STUDY

FINAL REPORT

APPLICATIONS
MANAGEMENT CONSULTING LTD.

Acknowledgments

This project was undertaken in collaboration with diverse groups and individuals whom we would like to thank for their support and input.

Research Consultants:

In Partnership with:

Facilitated by:

Fort McMurray Wood Buffalo Economic Development & Tourism

We also want to thank the regional stakeholders who participated in the engagement process for their valuable input, experiences, and support for the project.

Executive Summary

In recent years, Fort McMurray Wood Buffalo (FMWB) has experienced natural and economic events that have had significant impacts on the population and employment in the region. Those challenges continue to evolve in a changing economy and most recently with the impacts of the Covid-19 pandemic.

Labour Market Information emerges as key to helping businesses, governments, non-governmental organizations and individuals respond to the changes that are happening throughout the economy. Understanding labour patterns and trends is essential to remaining competitive as the economy continues to change in terms of demographics, in-demand skills, and technological advancement.

The FMWB Labour Study provides strategies intended for use by regional stakeholders to enable them to better understand and strategically plan for future workforce requirements and to identify specific workforce needs and shortages, emerging occupations and workforce trends and training gaps.

The FMWB Labour Study incorporates data driven analysis along with stakeholder feedback. The study includes insights learned from local employers and labour stakeholders, a detailed overview of the region today, and a five year labour market forecast.

What We Heard

Through a comprehensive engagement process, regional stakeholders provided input on their existing workforce, future needs and labour market issues and opportunities.

- Occupations with the highest turnover include: Petroleum, Gas and Chemical Process Operators, Security guards and related security service occupations, Heavy equipment operators, Crane operators, Other Professional Engineers, and Truck drivers.

- Overall, 20% of FMWB employers reported they had vacant positions that needed to be filled at the time of the survey. It was estimated there are approximately 3,112 vacant positions at the time of the survey.

- Top vacant positions by industry: The Accommodation and food services industry has the highest vacancy rate at 19.3%. Information and cultural industries (13.1%), Other services (10.1%), Transportation and warehousing (7.9%), Healthcare and social assistance (7.1%).

- Top vacant positions by occupation: Cooks, Construction trades helpers and labourers, Light duty cleaners, Food counter attendants, kitchen helpers and related occupations, Crane operators, Janitors, caretakers, and building superintendents, Administrative clerks, Truck drivers, and Heavy equipment operators.

- Recruitment challenges:

- Overall, 33% of FMWB employers reported difficulty recruiting qualified employees.
- Common recruitment challenges include: Attracting workers post pandemic, competing with large employers, difficult to get skilled workers to relocate, attracting workers to rural communities, loss of Northern Living Allowance on attracting skilled child care workers.

- Retention:
  - Overall, positive work environment and competitive salary were the most successful retention strategies identified by FMWB employers.
  - As a result of the pandemic, employers are adjusting policies around how people work including: professional development, wellness programs, work schedules/ flexibility, employee check-ins, different ways to engage with staff.

- Underemployed Groups[1]:
  - Thirty one percent of FMWB employers identified they did have plans to recruit people from at least one of these groups in the next 12 months.
  - Need to address barriers that limit the labour force participation of the underemployed groups.

- Accessing workplace resources and supports:
  - Sixty one percent of employers reported they had never applied for any workplace resources. The top reasons for not accessing workplace resources included: they don't think they qualify, never heard of them and they don't know enough about them.

Employment Outlook

- By 2025 employment demand in FMWB is forecasted to change from 78,808 in 2020 to 78,729 in the Low Scenario, 84,884 in the Medium Scenario and 93,073 in the High Scenario.
- On average, the broad occupation categories that have the largest employment demand growth are the Trades, transport and equipment operators and related occupations, Sale and services occupations, and Natural and applied sciences and related occupations.
- The top 5 occupations with vacancies will include: Crane operators, Cooks , Construction trades helpers and labourers, Hotel front desk clerks and Transport truck drivers.

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[1] Underemployed groups include: Indigenous, Mature workers, Newcomers, Persons with disabilities, Rural population, Women and Youth,

Labour Strategy & Action Plan

The Fort McMurray Wood Buffalo Labour Market Strategy & Action Plan provides strategies and actions that address objectives that emerged through the stakeholder engagement process. The Labour Market Strategy & Action Plan is intended for use by regional stakeholders that support employers and job seekers to establish a path towards addressing labour market needs of the region.

The Vision for the Fort McMurray Wood Buffalo Labour Market Strategy & Action Plan is as follows:

"Fort McMurray Wood Buffalo's business and economic conditions: strengthen the labour market, create accessible jobs for residents, and provide compelling reasons for new talent to choose Fort McMurray Wood Buffalo as a place to further their career. We achieve this by becoming a community with access to skills, training, and knowledge, that supports workers and professional growth."

To support the Vision, 5 labour market objectives were identified as follows:

- Objective 1: Increase awareness and access to regional labour market information.
- Objective 2: Align in demand skills and local training opportunities. .
- Objective 3: Supports for jobseekers to access training opportunities.
- Objective 4: Build the local labour supply.
- Objective 5: Promote Fort McMurray Wood Buffalo as a place to live and work.

Labour Market Objectives

Skills & Training

3

Support for jobseekers to access training opportunities

Build the local labour supply

2

Align in-demand skills and local training opportunities

4

Local Capacity & Growth

Labour Market Information

Increase awareness and access to regional labour market information

1

5

Promote Fort McMurray Wood Buffalo as a place to live and work
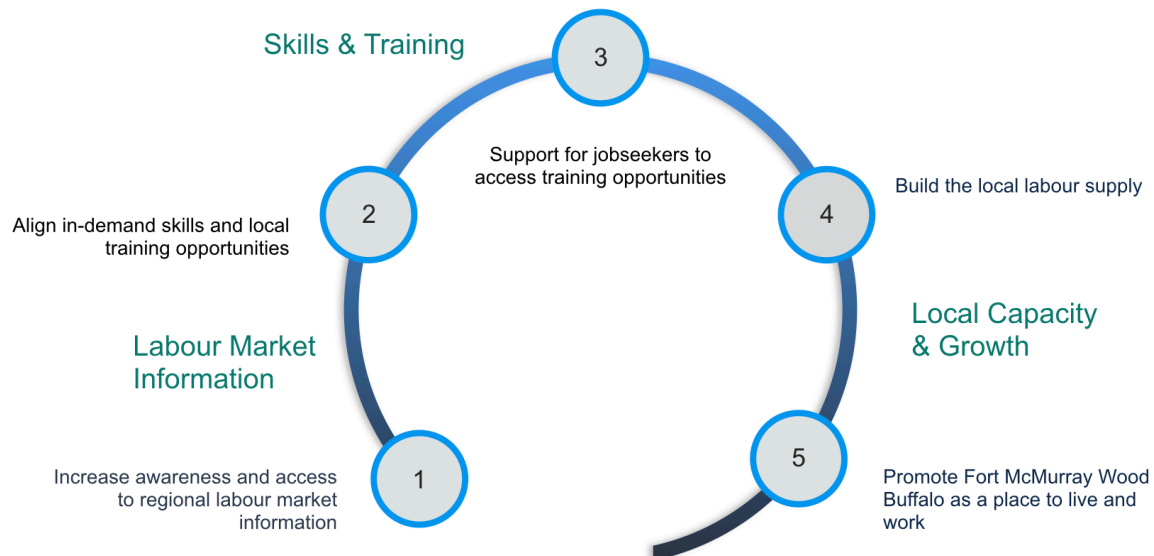
Summary of Labour Market Objectives & Strategies

Strategy	Objective 1 — Increase awareness of regional labour market information.	Objective 2 — Align in demand skills and local training opportunities.	Objective 3 — Supports for jobseekers to access training opportunities.	Objective 4 — Build the local labour supply in the Region.	Objective 5 — Promote the Region as a place to live and work.
Maintain a Regional Labour Market Committee.	●	●	●	●	●
Define shared goals among regional stakeholders	●	●	●	●	●
Maintain current, regional labour market information	●				
Promote and share Regional Labour Market Information	●				●
Align education and training with local needs		●	●	●	
Increase access to training opportunities			●	●	
Develop local capacity to fill jobs			●	●	
Increase participation of underemployed			●	●	
Attraction/retention of workers and families				●	●

Moving Forward

The Fort McMurray Wood Buffalo Labour Study is intended to be a living document that can support the regional labour market community over the coming years. The labour market issues and challenges identified during this process reflect the concerns at this time, and are expected to evolve over time requiring adjustments to the strategies and priorities.

Regional stakeholders expressed a common vision to advance labour market information to continue to build the local labour force and create opportunities for people to live and work in Fort McMurray Wood Buffalo.

Moving ahead, it is intended that this document has been developed to provide the Fort McMurray Wood Buffalo Region with a feasible, impactful path toward addressing some of the key labour market priorities and issues identified during the engagement process. Regional stakeholders can take the Labour Market Strategy & Action Plan and move it forward locally and regionally. Cross-sectional planning, collaboration between regional employers, programs and service providers, community organizations and the business community, and advocacy from local groups will aid in developing and implementing strategies to strengthen the regional labour market.

1. Introduction

1.1. Background

In recent years, Fort McMurray Wood Buffalo (FMWB) has experienced natural and economic events that have had significant impacts on the population and employment in the region. Those challenges continue to evolve in a changing economy and most recently with the impacts of the Covid-19 pandemic.

Labour Market Information (LM) emerges as key to helping businesses, governments, non-governmental organizations and individuals respond to the changes that are happening throughout the economy. Understanding labour patterns and trends is essential to remain competitive in an economy and labour market that has changed in terms of demographics, occupation skills required, technological advances and future training demands.

The FMWB Labour Study will provide strategies intended for use by regional stakeholders to enable them to better understand and strategically plan for future workforce requirements and to identify specific workforce needs and shortages, emerging occupations and workforce trends and training gaps.

1.2. Process

The FMWB Labour Study was initiated in the fall of 2020 and includes a significant component of stakeholder engagement through an employer survey and stakeholder discussion groups. The impacts of the Covid-19 pandemic resulted in several business shutdowns in late 2020 and early 2021, that made it challenging to engage with businesses. As a result, the employer survey was extended until March 2021, to ensure there was sufficient time to engage with a diverse range of employers.

The project includes a Steering Committee that represents different sectors and stakeholders across the region. The Steering Committee has met regularly to discuss project through the five different project phases.

Phase 1 included a review of existing background information to identify emerging trends, issues in the regional economy. In Phase 2 Stakeholder Engagement was implemented. The Stakeholder Engagement throughout the project included several opportunities to gather information on key labour market issues, challenges and opportunities to address issues.

- One-on-one discussions with key regional stakeholders to allow them the opportunity to provide background on labour market issues, challenges and opportunities facing the region. Initial key informant interviews were conducted in November 2020.

- Employer Survey: The employer survey reached out to employers across the region and throughout all industry sectors. The survey was conducted between November 2020 and March 2021. The employer survey included participation from 245

employers representing all industry sectors, business size and locations across the region.

- Stakeholder discussion groups: The purpose of these discussion groups was to further explore some of the themes emerging from the employer survey and initiate discussion around gaps and opportunities. Overall, 8 stakeholder discussion groups have been held that comprise organizations from different sectors, across the region and representing employers, job seekers and training providers.

- Verification Engagement: The purpose of these sessions was to review draft strategies and discuss potential opportunities to address issues and challenges identified during the process.

In Phases 3-5 the consulting team prepared a regional labour market analysis to project employment demand and supply for the next 5 years by industry and occupation.

All of these project elements provide a more in depth understanding of the regional labour force, identified labour market gaps and issues, and highlighted labour market assets. The resulting FMWB Labour Study will deliver a way forward for the region to guide stakeholders in addressing gaps and issues and capitalizing on opportunities that exist.

2. Regional Profile

The following sections provide a historical demographic and economic profile for FMWB.

2.1.Geography

For the purposes of the regional profile and the employment forecast in section 5 of the report, the geography is Fort McMurray Wood Buffalo which is based on the Wood Buffalo Census Agglomeration (CA) . This geography includes the following communities:

- Fort McMurray Urban Services Area
- Anzac
- Conklin
- Draper
- Fort Chipewyan
- Fort Fitzgerald
- Fort McKay
- Gregoire Lake Estates
- Janvier
- Saprae Creek Estates
- Allison Bay 219
- Chipewyan 201A
- Dog Head 218
- Fort Mackay
- Gregoire Lake 176
- Gregoire Lake 176A
- Janvier 194
- Old Fort 217
- Thabacha Nare 196A

A map of the geography is provided on the following page.

Geography Map[2]

The map shows the Wood Buffalo region with the following communities marked by stars: Fort Fitzgerald, Fort Chipewyan, Fort Mackay, Fort McMurray, Gregoire Lake Estates, Draper, Anzac, Saprae Creek, Janvier, and Conklin.

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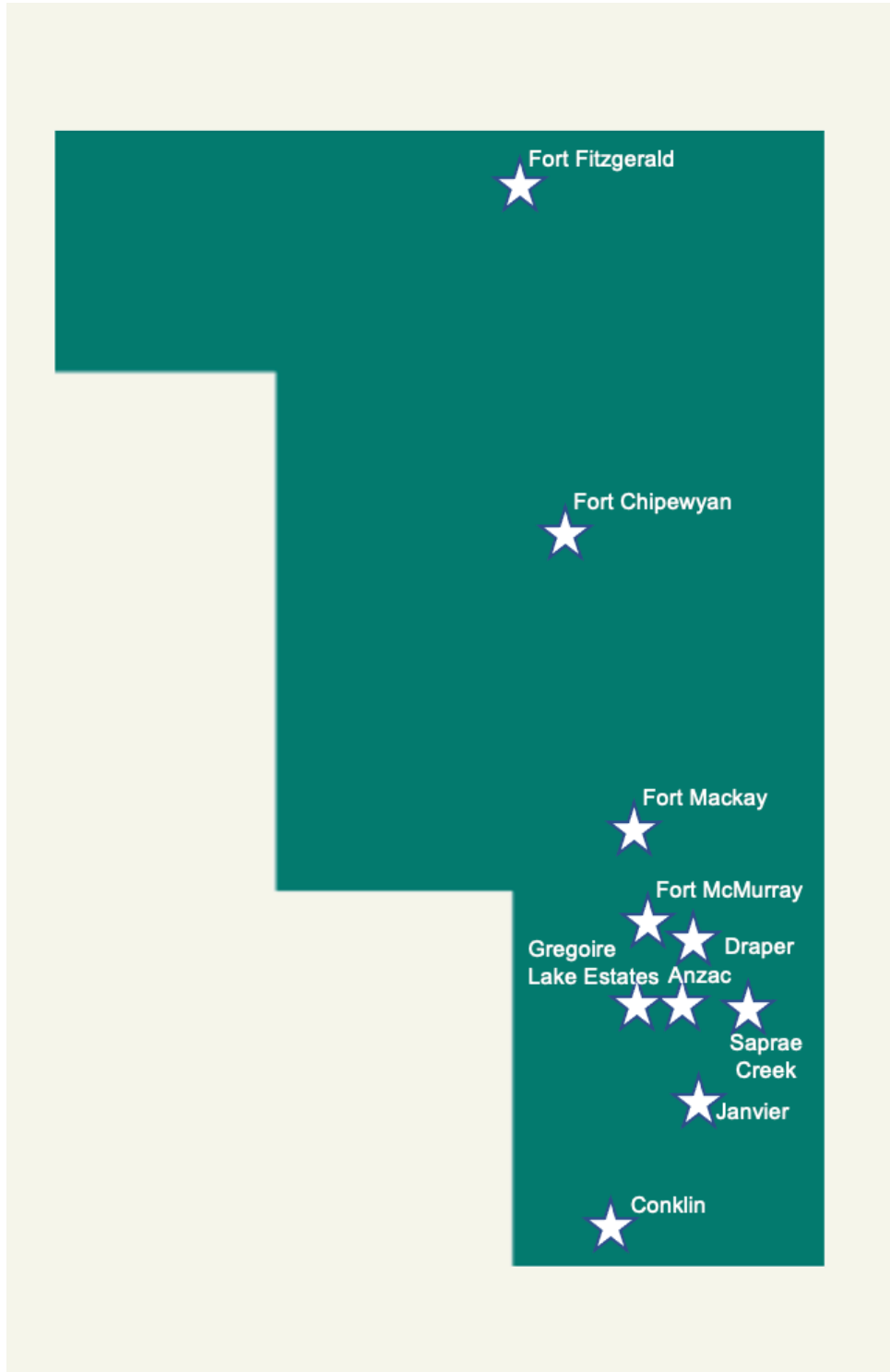
[2] The following communities are not identified on the map, but are included within the Wood Buffalo CA: Allison Bay 219, Chipewyan 201A, Dog Head 218, Fort MacKay IR, Gregoire Lake 176, Gregoire Lake 176A, Janvier 194, Old Fort 217, and Thabacha Nare 196A.

2.2. Regional Demographic Profile

The following sections provide a historical demographic profile for Fort McMurray Wood Buffalo.

- In 2020, there were an estimated 76,263 residents in FMWB, of which 93% live in the Fort McMurray Urban Services Area.
- Fifty four percent of the permanent population is male, which increases to 63% when including the shadow population.
- Residents who are not members of an economic family increased in the 2010s, accounting for 29% of the population in 2011 and reaching 49% in 2016.

2.2.1. Population

In 2018, FMWB had a population of 111,687 of which 75,009 were permanent residents and the remaining 36,678 were temporary residents belonging to the shadow population. [3] Statistics Canada reported an additional 1,910 people in the full census agglomeration which would increase the 2018 local population to 76,919 and the total population to 113,597. In 2020, the total population for the census agglomeration was 114,119, of which 76,263 were local residents and 37,856 were members of the shadow population.

FMWB Population 2006-2020[4]
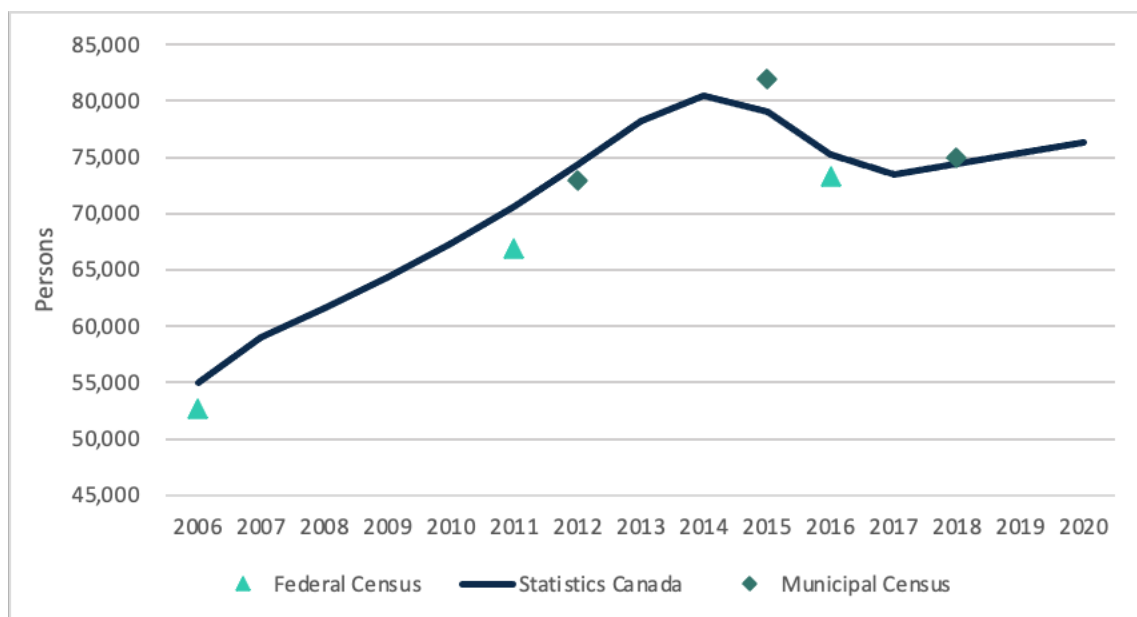
Source: Statistics Canada Federal Census, RMWB Municipal Census, Statistics Canada 17-10-0135-01

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[3] The shadow population refers to temporary residents of a municipality who are employed by an industrial or commercial establishment for a minimum of 30 days within a RMWB Municipal Census year.

[4] The population from the RMWB Municipal Census is representative of the Wood Buffalo census subdivision. The Statistics Canada data is for the broader Wood Buffalo census agglomeration.

2.2.2.Population Growth

Between 2006 and 2011 FMWB saw a sharp increase in population, increasing by an average of 4.9% a year. Following 2011, FMWB continued to see high growth through to 2014, but the growth slowed with the falling oil prices at the end of 2014, decreasing by 8.7% by the end of 2017. This is corroborated by the 2018 RMWB Municipal Census that shows the local population to decline by 9.1% from 2015 to 2018. According to Statistics Canada FMWB's population began to regrow in 2018, increasing by 1.2% a year through 2020.[5]

2.2.3.Regional Population

FMWB encompasses many communities, the largest of which is the Fort McMurray Urban Services Area (USA). In 2016, the USA accounted for 94.1% of the FMWB population, and 93.3% in 2020.

The following table provides a breakdown of the population within FMWB.

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[5] Statistics Canada Table 17-10-0135-01

Regional Population by Community[6]

Community	2016	2020 (Estimate)
Fort McMurray (USA)	66,573	71,187
Anzac	548	635
Conklin	185	220
Draper	-	180
Fort Chipewyan	852	880
Fort Fitzgerald	0	8
Fort McKay	-	57
Gregoire Lake Estates	165	196
Janvier	100	136
Saprae Creek Estates	572	688
Allison Bay 219	127	154
Chipewyan 201A	-	-
Dog Head 218	99	117
Fort Mackay	742	880
Gregoire Lake 176	191	225
Gregoire Lake 176A	130	155
Janvier 194	414	515
Old Fort 217	-	-
Thabacha Náre 196A	28	30
Total	70,726	76,263

Source: Statistics Canada Federal Census, Estimates prepared by Applications Management Consulting

2.2.4.Population by Age Group

The gender breakdown of FMWB shows males comprise 54% of the permanent population, which increases to 63% when the shadow population is included. Mining and oil and gas extraction, and the related industries, are primarily male dominated leading to the skewed gender profile of the total population. The following graphs show the

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[6] The regional populations are informed from the 2016 federal census, and there are some discrepancies between the individual community populations and the regional total due to data suppression. For the Wood Buffalo Census Agglomeration there is a discrepancy of 2,594 between the aggregate population and the sum of the individual communities reported populations.

demographic split for the region. The first is for the local population[7] and the second is the total population, including both the permanent and shadow population.

2020 Local Population Distribution
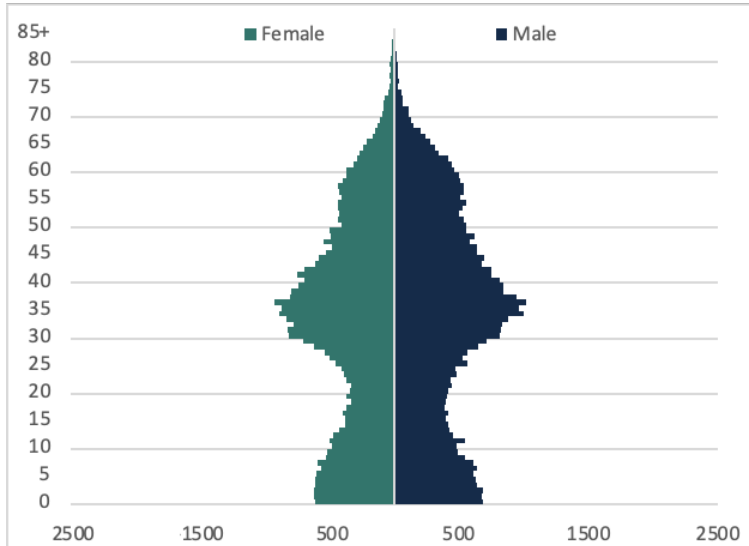
Source: Statistics Canada Federal Census, Estimates prepared by Applications Management Consulting

2020 Total Population Distribution[8]
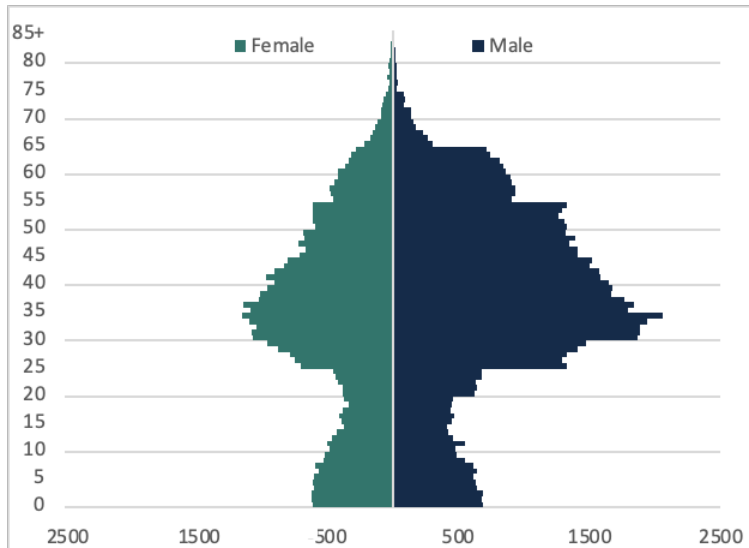
Source: Statistics Canada Federal Census, Estimates prepared by Applications Management Consulting

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[7] Permanent resident population excluding the residential shadow population and camp workers

[8] The demographic distribution of the shadow population is based on the 2016 profile for the Mining, quarrying, and oil and gas extraction sector in FMWB.

2.2.5.Family Composition

Statistics Canada defines families based on the relationships among the people who live in the household. In 2016, individuals not in families made up 49% of the families in the region, this is an increase from the 29% in 2011. The other three family types all saw a decline in their portion of the local population with couples with children declining from 29% to 18%, couples only families decreasing from 37% of the households to 25% and lone-parent households decreasing from 9% to 8% of the local population.

Family Characteristics
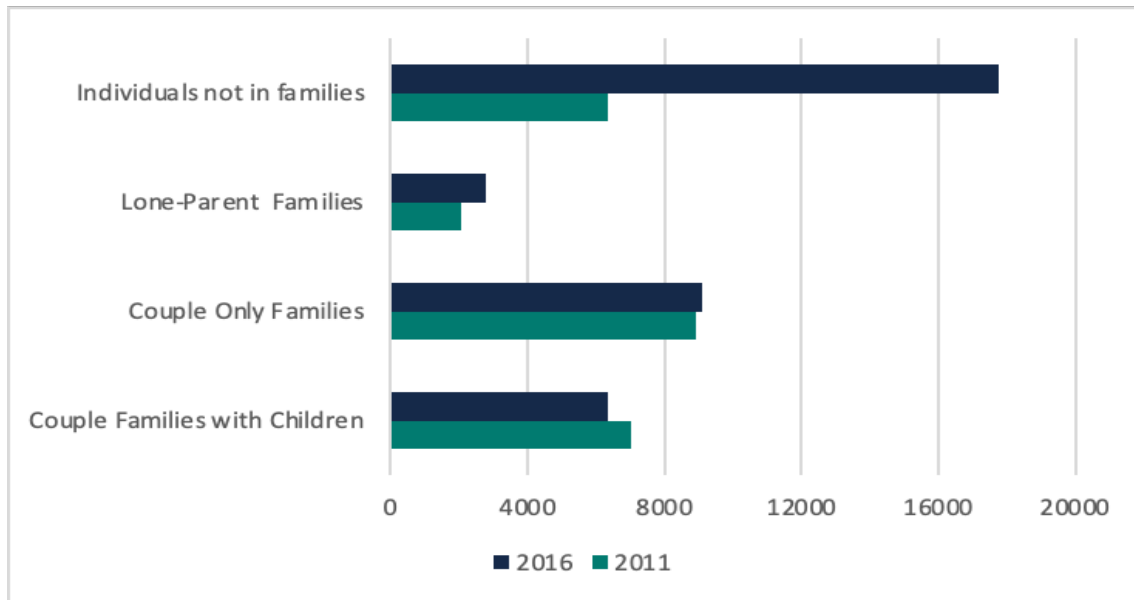
Source: Statistics Canada Federal Census

2.3.Labour Force

The working age population is defined as those persons aged 15 years and older. The labour force is a subset of the working age population and is defined as persons having a job or business and unemployed persons who are available for work and are actively seeking employment. Those deemed to be not in the labour force represent the rest of the working age population.

- In 2020 there were 40,952 local residents employed in FMWB, with approximately 37,856 people commuting from other jurisdictions. Due to the downturn in 2020, there were approximately 4,450 unemployed residents.

- In 2020, 38% of total employment in FMWB worked in Trades, transport and equipment operators and related occupations.

- Based on historical and provincial employment trends, there are an estimated 23,000 working age people from traditionally underemployed group (indigenous people, women, youth and seniors) that are not actively employed.

2.3.1.Working Age Population

The demographic breakdown of FMWB shows that the population trends young, with 67% of the permanent population between 15 and 64, increasing to 77% when the shadow population is included. In comparison the provincial demographics have only 55% of the population within the same age range.

In 2006, FMWB had 41,905 permanent residents in the working age population, of which 32,810 were employed. Similar to the overall population growth the working age population grew quickly reaching 54,225 by 2011, of which 42,765 were employed. The working age population continued to grow through 2016 reaching 58,505 in 2016, however despite the increasing potential labour force the employed residents decreased to 42,130. This new trend continues in 2020 with the working age population reaching with 59,963 and local employment at 40,952.

Fort McMurray-Wood Buffalo Labour Force Status
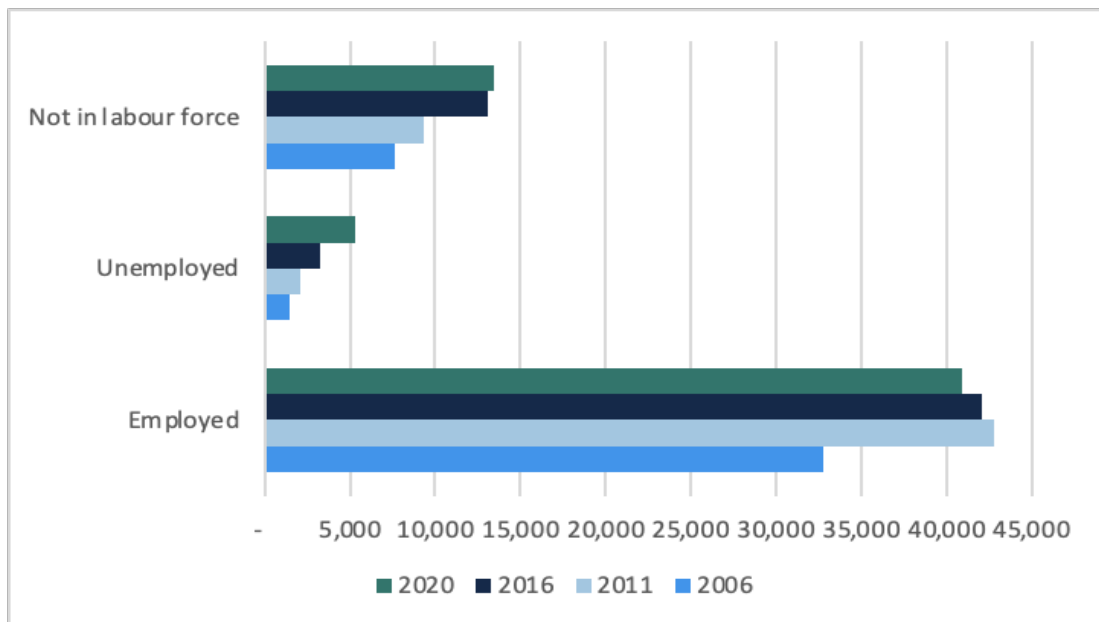
Source: Statistics Canada Federal Census

2.3.2.Employment

2020 does provide a unique circumstance due to the Covid-19 pandemic which impacted global employment. FMWB's total employment goes beyond the local population, incorporating a significant shadow population employment. According to the 2018 RMWB Municipal Census the shadow population had declined by 15% since the previous RMWB Municipal Census in 2015.

Fort McMurray Wood Buffalo Employment 2011-2020
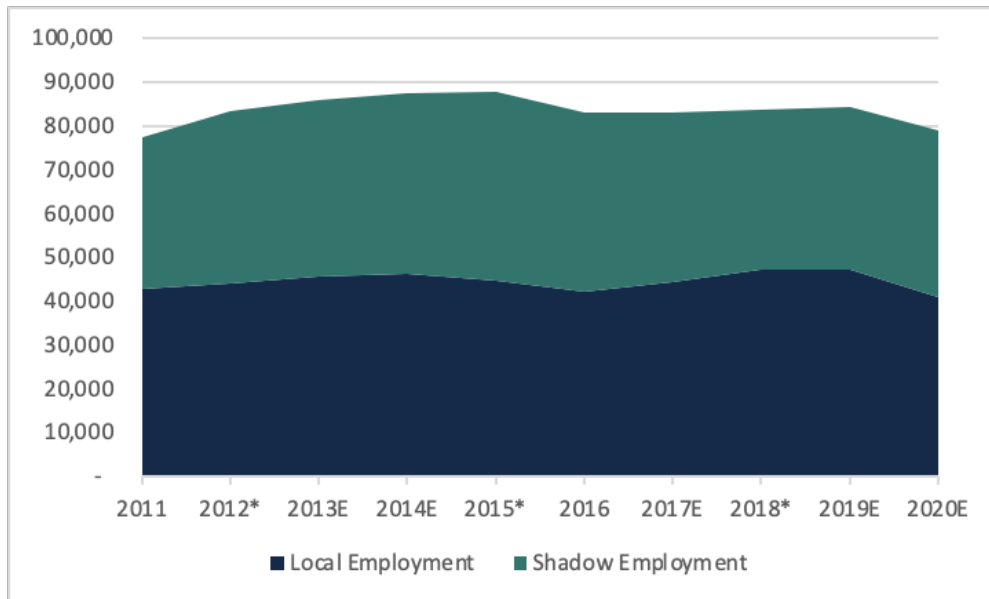
Source: Statistics Canada Federal Census, RMWB Municipal Census, Estimates from Applications Management Consulting Ltd.

Note: 2012, 2015, and 2018 the shadow population is from the RMWB Municipal Census.

2.3.3.Unemployment Rate

As the employment has shifted in the last 10-years so has the unemployment rate. According to Statistics Canada's Federal Census the Wood Buffalo Census Agglomeration had an unemployment rate of 4.7% in 2011 and in 2016 it had increased to 7.2%. Data on the broader economic region shows that the unemployment rate was beginning to decline with the increasing employment in FMWB until 2020 when Covid-19 led to a sharp increase in unemployment putting the regional rate at 9.3%. The total unemployment in FMWB is estimated at 4,456 in 2020.

FMWB Unemployment Rate 2011-2020
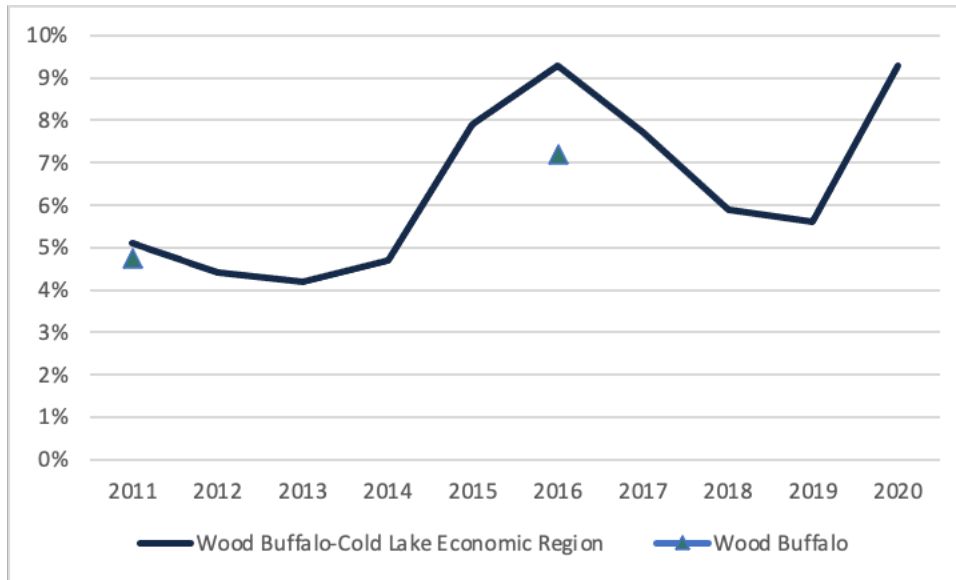
Source: Statistics Canada Federal Census, Statistics Canada table 14-10-0090-01

2.3.4.Employment by Community

Similar to the population by community, the Urban Services Area comprises the largest share of the local workforce, representing 95.9% of local employment in 2016 and 93.9% in 2020. This decreases significantly when the shadow population is included, putting the USA at 49.2% of total employment for both periods. This puts the shadow employment at 48.7% of the 2016 total employment and 47.6% of the 2020 employment.

Employment by Community[9]

	2016	2020 (Estimate)
USA	38,294	39,201
Anzac	231	228
Conklin	43	42
Draper	-	-
Fort Chipewyan	318	324
Fort Fitzgerald	-	-
Fort McKay	-	-
Gregoire Lake Estates	95	159
Janvier	45	47
Saprae Creek Estates	366	358
Allison Bay 219	42	40
Chipewyan 201A	10	7
Dog Head 218	13	12
Fort Mackay	222	323
Gregoire Lake 176	79	63
Gregoire Lake 176A	22	24
Janvier 194	115	124
Old Fort 217	-	-
Thabacha Náre 196A	-	-
Local Total Employment	39,895	40,952
Shadow Employment	43,090	37,856
Total Employment	82,985	78,808

Source: Statistics Canada Federal Census, Estimates prepared by Applications Management Consulting

2.3.5.Employment by industry

FMWB labour market includes local residents as well as the shadow population, which provides labour with primary residence outside the region. In 2020, 40,952 jobs in FMWB were filled by the local population. The industries that employee the largest share of the local population are Mining, quarrying, and oil and gas extraction (32%), Construction

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[9] 2020 Community employment is based on the employment reported in the Statistics Canada Federal Census and the RMWB 2015 Census

(10%), Retail trade (7%), and Accommodations and food services (6%). The remaining 38,381 jobs in FMWB are filled by the shadow population. The majority of the shadow population reside in industry camps, but a small portion does reside within the FMWB communities.

2020 Employment by Industry

	Local	Shadow	Total
11 Agriculture, forestry, fishing and hunting	159	-	159
21 Mining, quarrying, and oil and gas extraction	13,201	22,576	35,777
22 Utilities	329	-	329
23 Construction	4,281	10,987	15,268
31-33 Manufacturing	1,167	-	1167
41 Wholesale trade	344	-	344
44-45 Retail trade	2,952	350	3,302
48-49 Transportation and warehousing	1,574	1,355	2,929
51 Information and cultural industries	168	-	168
52 Finance and insurance	360	-	360
53 Real estate and rental and leasing	834	-	834
54 Professional, scientific and technical services	2,188	-	2188
55 Management of companies and enterprises	520	-	520
56 Administrative and support, waste management and remediation services	1,695	-	1695
61 Educational services	1,761	-	1761
62 Health care and social assistance	2,382	-	2382
71 Arts, entertainment and recreation	836	-	836
72 Accommodation and food services	2,645	2,413	5,058
81 Other services (except public administration)	1,645	175	1,820
91 Public administration	1,911	-	1911
Total	40,952	37,856	78,808

Source: 2016 census for Wood Buffalo adjusted based on the Fort McMurray Wood Buffalo Employer survey and Industry specific changes for the Wood Buffalo-Cold Lake economic region as reported in Statistics Canada Table 14-10-0092-01

2.3.6.Employment by Major Occupation

The occupational breakdown of the regional employment shows that the Trades, transport and equipment operators and related occupations account for the largest

portion of FMWB employment (38%), the next largest occupation grouping is Sales and service occupations with only 13% of the total population. The shadow population has a larger share of employment in three occupation groupings Trades, transport and equipment operators and related occupations (59% shadow population), Natural resources, agriculture and related production occupations (58% shadow population) and Natural and applied sciences and related occupations (51% shadow population).

2020 Employment by Occupation

	Local	Shadow	Total
0 Management occupations	3,681	3,056	6,737
1 Business, finance and administration occupations	5,089	3,921	9,010
2 Natural and applied sciences and related occupations	3,892	4,012	7,904
3 Health occupations	1,348	93	1,441
4 Occupations in education, law and social, community and government services	2,957	497	3,454
5 Occupations in art, culture, recreation and sport	529	20	549
6 Sales and service occupations	7,165	2,910	10,075
7 Trades, transport and equipment operators and related occupations	12,139	17,721	29,860
8 Natural resources, agriculture and related production occupations	1,603	2,175	3,778
9 Occupations in manufacturing and utilities	2,549	3,451	6,000
Total	40,952	37,856	78,808

Source: Estimates by Applications Management Consulting LTD.

2.3.7.Employment Trends: Indigenous Status

In FMWB approximately 10% of the local working age population identifies as Indigenous according to the 2016 census. In 2016, the Indigenous population participation rate of 72.2% was lower compared to the FMWB total participation rate of 80.9%. The unemployment rate was 11.1% for the FMWB Indigenous population which is notably higher than the FMWB rate of 6.8%. Due to the lower participation rate and higher unemployment rate 36% of FMWB's working age Indigenous population was not actively employed. Assuming the same profile for the labour availability of FMWB's

Indigenous population in 2020 approximately 2,315 Indigenous people of working age are not actively employed.

Unemployment Rate by Indigenous Status
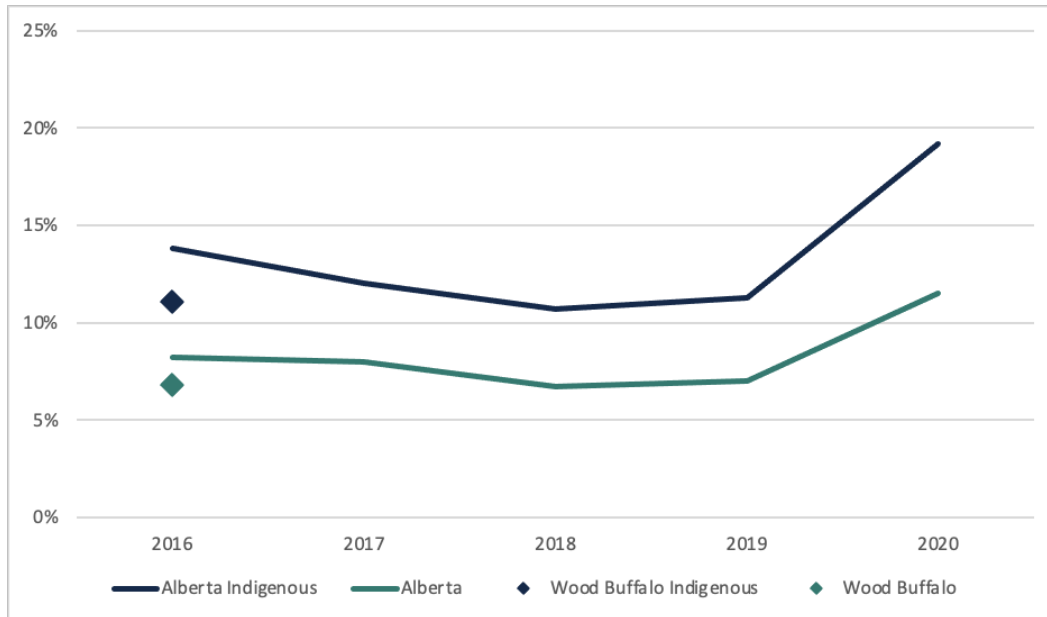
Source: Statistics Canada Federal Census Catalogue no. 98-400-X2016176.and Statistics Canada Table 14-10-0364-01

Participation Rate by Indigenous Status
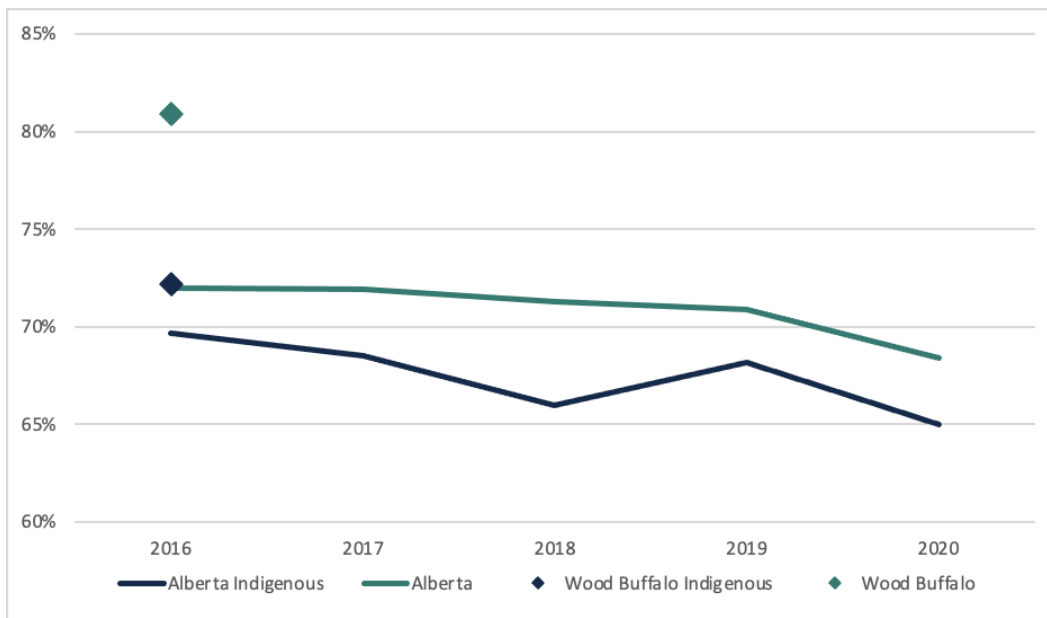
Source: Statistics Canada Federal Census Catalogue no. 98-400-X2016176.and Statistics Canada Table 14-10-0364-01

2.3.8.Employment Trends: Gender

In FMWB females make up a smaller portion of the labour force than males, while females are 46% of the working age population, they only account for 40% of the active labour force. In addition, females had a participation rate of 67.6%, which is higher than that of the provincial participation rate for females at 66.4%, but lower than the male participation in FMWB at 86%. This low participation rate for females indicates an untapped portion of the labour force. However, females also face a higher unemployment rate in FMWB at 8.4%, two percentage points higher than the 6.3% unemployment for males. While FMWB has a higher unemployment rate for females than males this does not hold true for the rest of the province, as the unemployment rate in Alberta was 7.4% for females and 8.8% for males. In 2016 both genders in FMWB had a lower unemployment rate and higher participation rate than the rest of Alberta. Assuming the same labour force status profile for FMWB females in 2020, approximately 13,600 women of working age are estimated to not be actively employed.

Unemployment Rate by Gender
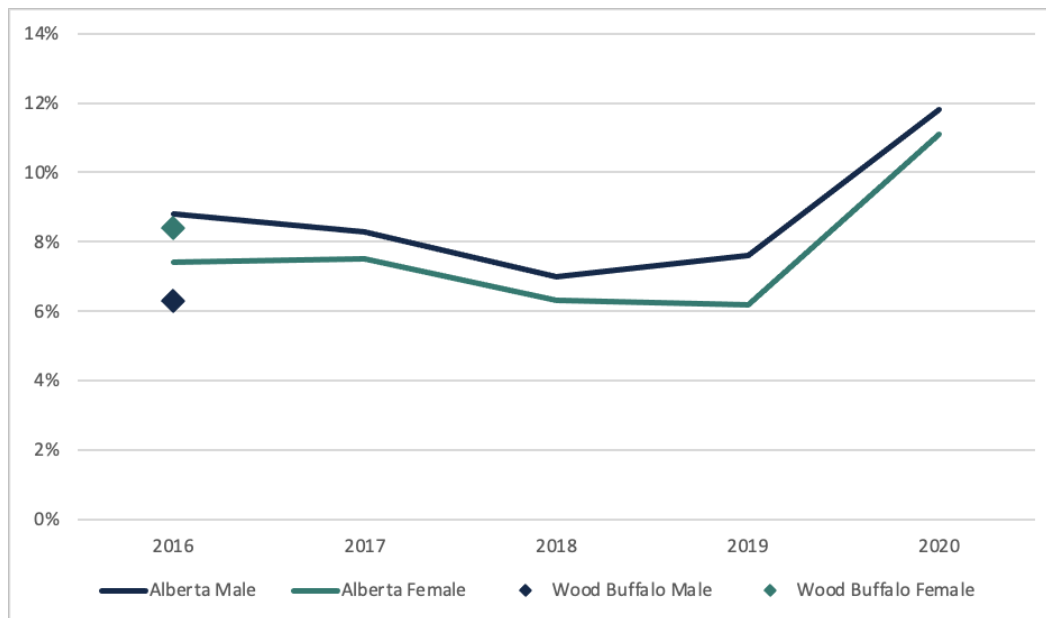
Source: Statistics Canada Federal Census and Statistics Canada Table 14-10-0327-01

Participation Rate by Gender
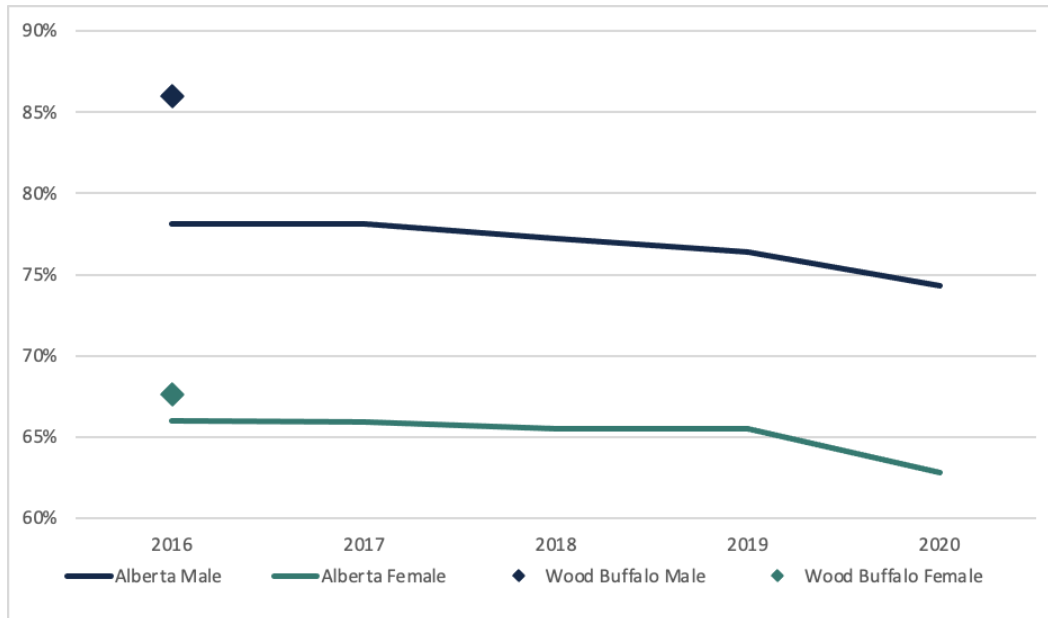
Source: Statistics Canada Federal Census and Statistics Canada Table 14-10-0327-01

2.3.9.Employment Trends: Age

Youth and seniors are often underemployed population groups with the potential to be further engaged in the labour force. In 2016, 14% of the working age population were youth, aged 15-24, and 3% were seniors, 65 and older. From 2016 to 2019 approximately 34% of youth were either unemployed or not actively participating in the labour force, this increased further to 39% in 2020. The low employment for youth was primarily driven by the unemployment rate which averaged at 12.6% from 2016 to 2019, reaching 24.1% in 2020. A smaller portion of Alberta seniors are actively working with approximately 82% unemployed or not actively engaged in the labour force from 2016-2019 and increasing slightly to 85% in 2020. The low employment for seniors is driven by the participation rate, which sat around 20% up until 2020 when it decreased to 16%. Assuming the provincial profile applies for the youth and seniors in FMWB there were approximately 4,250 youth and 2,600 seniors not actively employed in 2020.

Alberta Unemployment Rate by Age
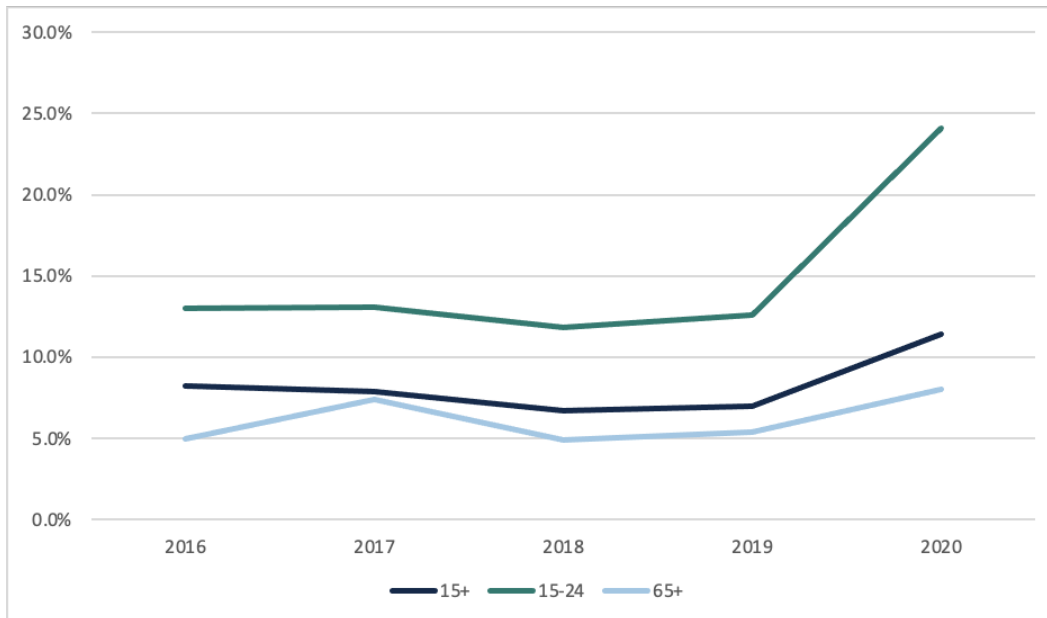
Source: Statistics Canada Table 14-10-0327-01

Alberta Participation Rate by Age
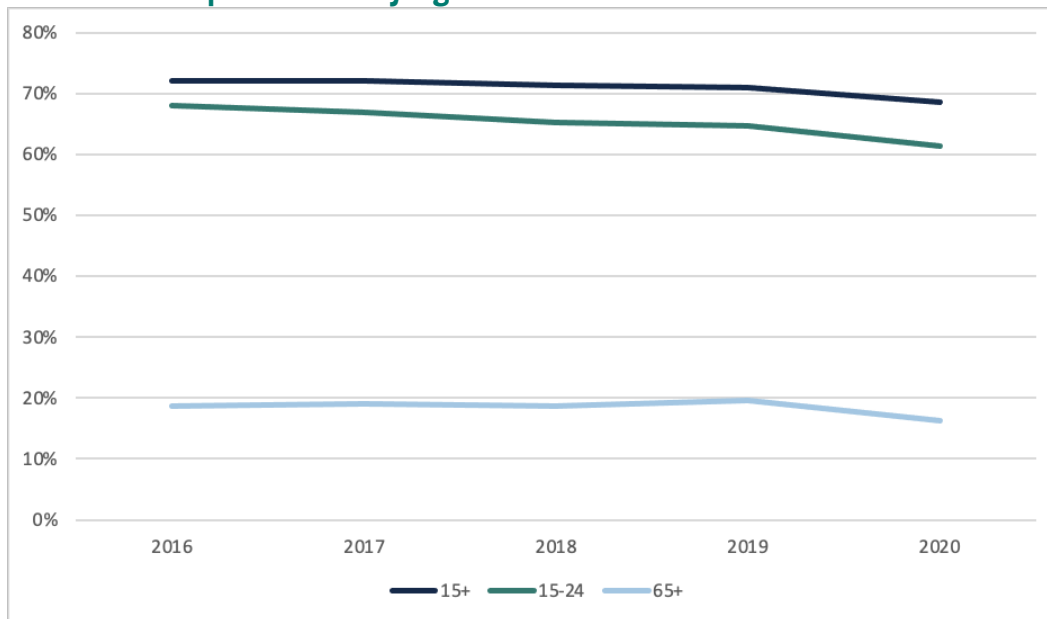
2.4.Income & Affordability

- At $193,511 in 2015, the median household income in FMWB was 106% higher than the provincial median income. However, between 2010 and 2015 the median household income grew at a faster rate provincially compared to FMWB.

- Despite the higher housing costs in FMWB only 12% of the population is spending more than 30% of their income on housing, in comparison provincially 21% of the population spends over 30% of their income on housing.

- While FMWB has some of the highest incomes in the province it is also faced with some of the highest costs of living. In 2018 cost of living in FMWB was approximately 11% higher than in Edmonton this is a decrease from previous years as in 2016 FMWB cost of living was approximately 14% higher than Edmonton.

2.4.1.Median Household Income

Median household income is the income which half of the population in the selected geography have a higher income and half have lower income. Median income is a useful metric as outliers on either side do not skew the data as with average incomes. Over the last 10-years FMWB has shown a high household income when compared to the provincial median income, in 2010 it was 99% higher. Through the last 10-years this trend has continued, however the FMWB income growth is not as high as the provincial growth. FMWB median income hit a peak in 2014 at $185,030. In 2015 and 2016 the median income in FMWB declined by a total of 11%. While incomes have become to rise the 2019 median household income was $176,650 in FMWB 70% than the provincial median of $104,130. Due to mid-decade decline, the median household income in FMWB was only 4% higher in 2019 compared to 2010, in comparison the median household income in Alberta was 22% higher than 2010.

Median Household Total Income (2010-2019)
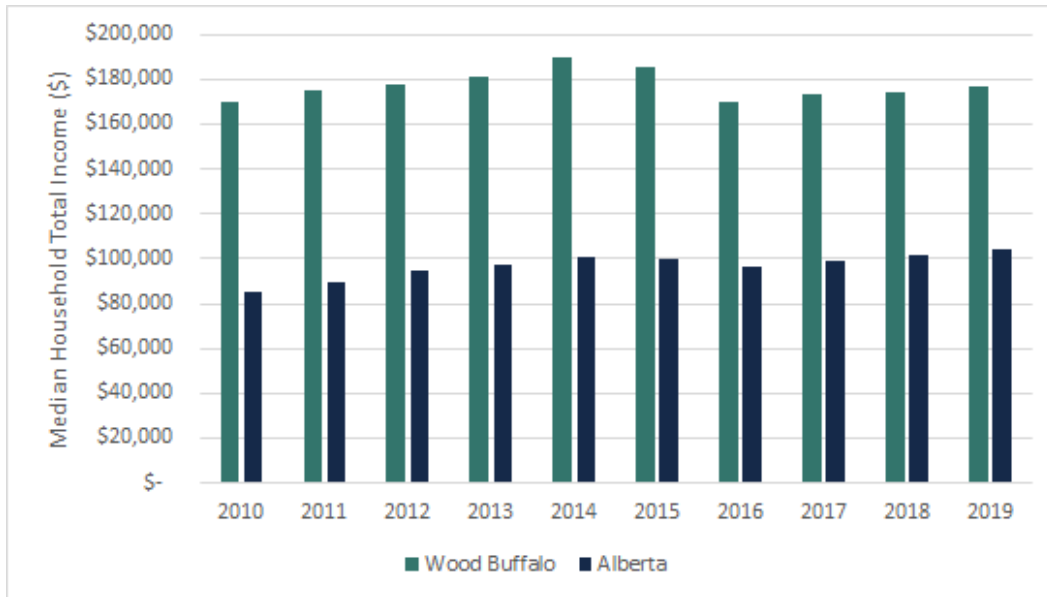
Source: Statistics Canada Federal Census

2.4.2.Household Income Distribution

While the median income is a strong indicator of the regional affordability it is also important to examine the income distribution to better understand the range of incomes and affordability in the region. The income distribution in FMWB shows that 80% of the households in FMWB earned at least $90,000 a year, showing that a large portion of the households under the median income had an income over the provincial median. Given that 2016 saw a sharp decline in the median household income it is likely that this profile will see a shift in the next census.

Household Income by Income Band (2015)
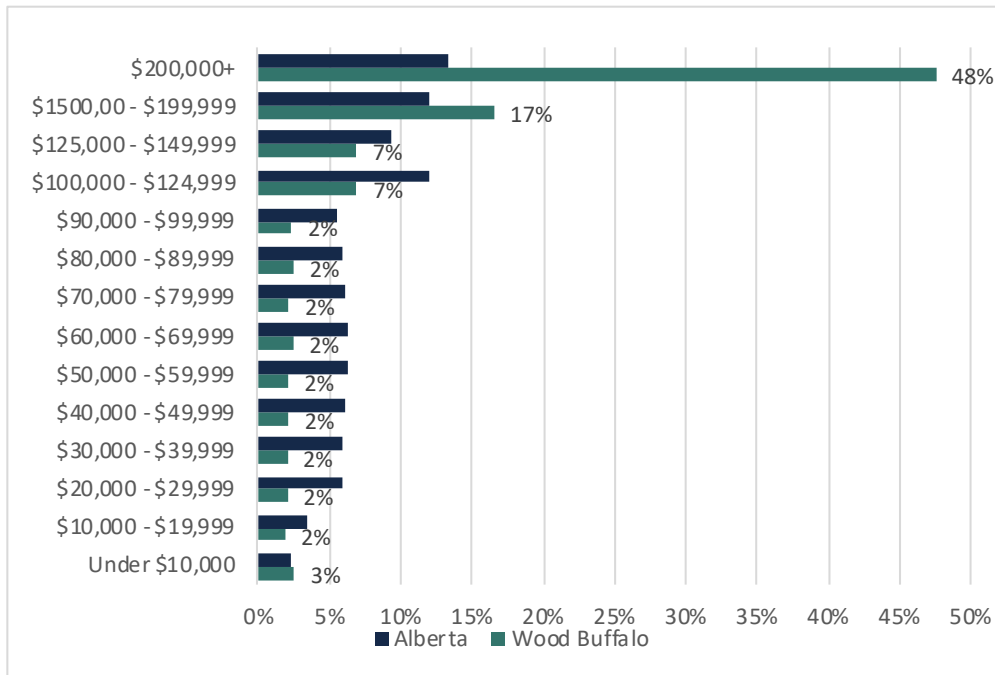
Source: Statistics Canada Federal Census

2.4.3. Housing Affordability

In 2016, the average cost for FMWB housing was $1,800 for rented dwellings and $2,696 for owned dwellings. In comparison, the average provincial cost for a rental was $1,279 and $1,531 for owned dwellings. Despite the higher costs for shelter 88% of households in FMWB spent less than 30% of their income on shelter, while across Alberta only 79% of households spent 30% or less of their earning on shelter. This indicates that higher housing prices in FMWB were made accessible due to the high income in the region. One thing to note is that when the ownership is considered the FMWB metrics due shift, as 90% of households that owned their dwelling were under the 30% cut-off, but this goes down to 82% for the rented dwellings. While both categories show the majority of households are under the affordability cut-off there is a slight difference in affordability for those who rent.

Housing Affordability by Type (2011, 2016)
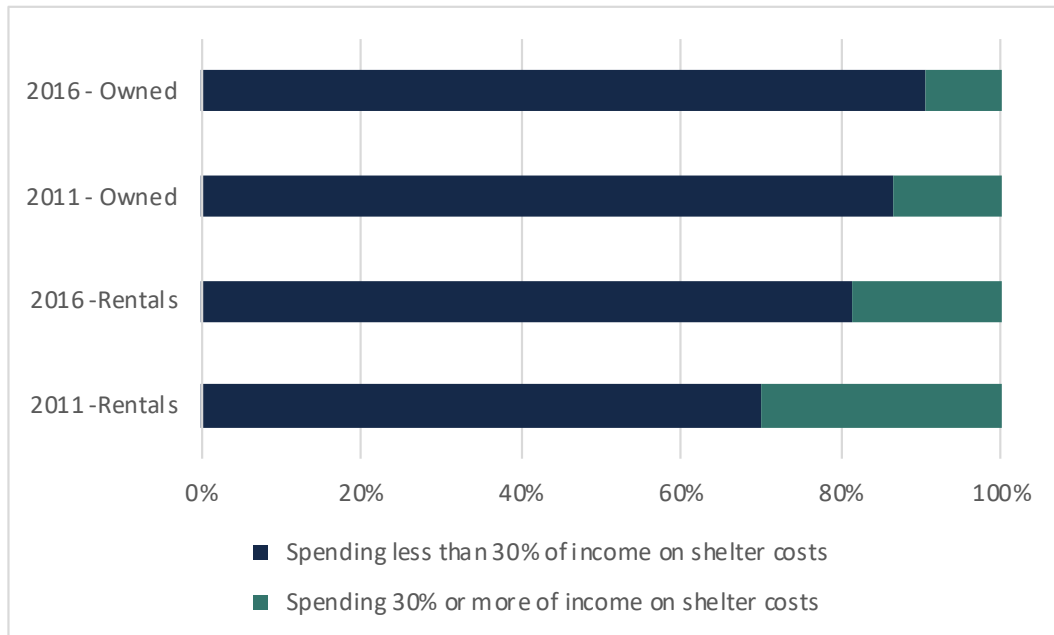
Source: Statistics Canada Federal Census

Despite the decline in median household income in FMWB the housing affordability will see a balance as the shelter costs have declined in the same period. From 2014-2020 the average rent for a bachelor pad declined by 7.1% a year, one bedroom suites declined by 6.4% a year, 2 bedroom suites declined by 6.9% a year, and three bedroom suites declined by 6.2% a year. This means that the annual costs of housing in a bachelor apartment would be approximately $6,200 less in 2020 than in 2014, and the annual cost of housing in a 3 bedroom apartment would be almost $9,700 less than 2014. Housing costs have also declined since 2014. In 2014 the average new construction sold for $802,571 which decreases by an average of 3% a year to $664,925 in 2020, although 2018 had the lowest average prices at $522,528.

2.4.4.Cost of Living Comparison

Shelter is only one portion of the costs that the residents of FMWB need to account for when considering the affordability of the region. Research from 2018 shows the affordability of different communities in Alberta for various categories, using Edmonton as a base for comparison. The following chart shows a sample of the categories and communities for comparison with FMWB, the percentage indicates how the prices for the category differ from Edmonton. For almost all categories FMWB has higher costs compared to Edmonton, with shelter the highest at 26% of the Edmonton prices. Looking at comparator regions shows that FMWB has higher prices for most goods and services, with the exception of utilities and recreation and leisure. While the study finds FMWB all items index to be 11.1% higher than the costs in Edmonton, this marks a narrowed difference compared to 2016 when the same study found FMWB prices to be 14.5% higher than Edmonton.

Regional Affordability by Category, 2018[10]
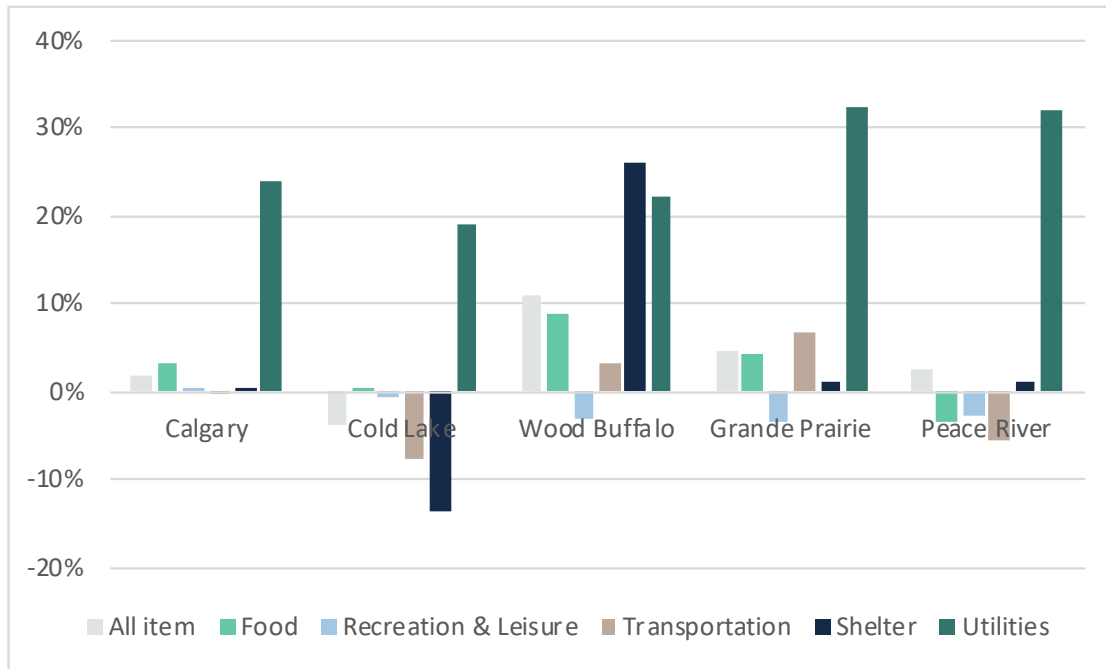
Source: Alberta Spatial Price Index, Alberta Place-to-Place Price Comparison Index.

2.5.Education

- Over the last five years FMWB has shown higher high school completion rates compared to the provincial average.

- FMWB has a slightly lower transition rate for high school students going to post-secondary education. The largest program band that FMWB student enrolled in is Trades and technologists, despite seeing a 50% drop since 2011.

- Overall FMWB is highly educated with almost 60% of the population having post-secondary training in 2016.

2.5.1.High School Completion

High school completion is a base for the educational and labour opportunities afforded to the local residents. High school completion is defined as receiving an Alberta High School Diploma, High School equivalency Diploma (GED), Certificate of High School Achievement or continuing on to post-secondary education such as Apprenticeship without receiving any of the above. Alberta's Ministry of Advanced Education provides data on high school completion rates across Alberta for those who meet the criteria of completion five years of starting grade 10. The following chart shows that since 2014 FMWB, designated as the Keyano Post-Secondary Region, the high school

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10 The study looks at Fort McMurray specifically and prices may see additional variation within the study area.

completion rate has increased. In 2014/15 FMWB had a completion rate of 83%, 1% higher than the Alberta average, in 2017/18 this had increased to 89% which was 4% the provincial average. In the 2018/19 Wood Buffalo did see a dip in completions returning to 87%, still above the provincial average and 4% above the 2014/15 rate for the region.

2.5.2.High School Transition Rate

Additional education is required for many positions. The high school transition rate shows the percentage of high school students that attend post-secondary within six years of starting grade 10. Transition to post-secondary is considered to be when a person attends a post-secondary institution or registers in an apprenticeship program. As the following chart shows Alberta has had a relatively consistent transition rate around the 60% mark since 2014/15. The Keyano Post-Secondary Region has shown more shifts in the same period, starting with a transition rate of 57% in 2014/15, which declines to 48% by 2016/17 before again increasing to 55% in 2018/19.

High School Transition Rate, within six-years of starting grade 10
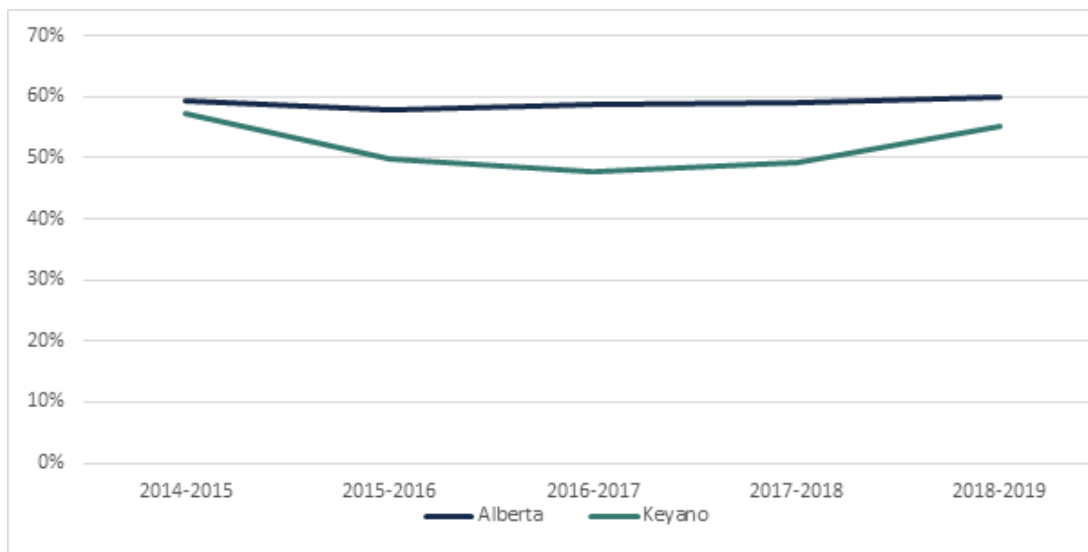
Source: Alberta Advanced Education High School to Post-Secondary Transition Rate by Post-Secondary Service Region

2.5.3.Post-secondary Enrolment by Program Band

Post-secondary education encompasses many types of training to support educational needs for many different fields. Looking at the post-secondary enrolment of FMWB residents since 2011 shows a declining total of residents enrolled in post-secondary with a declining enrolment in most programs. The programs that have increased since 2011 are Physical, Natural and applied science which has increased Languages, social sciences, arts & humanities, Health sciences and Education. These four programs have seen enrolment increase by 341 students, with Education showing the largest growth with 123 additional enrolments. The remaining programs have declined a combined total of 1,347 enrolments since 2011. The program band with the largest decline was Trades and

technologists which decreased by 738 enrolments, equivalent to 50% of the 2011 band cohort.

FMWB Enrolment by Program Band
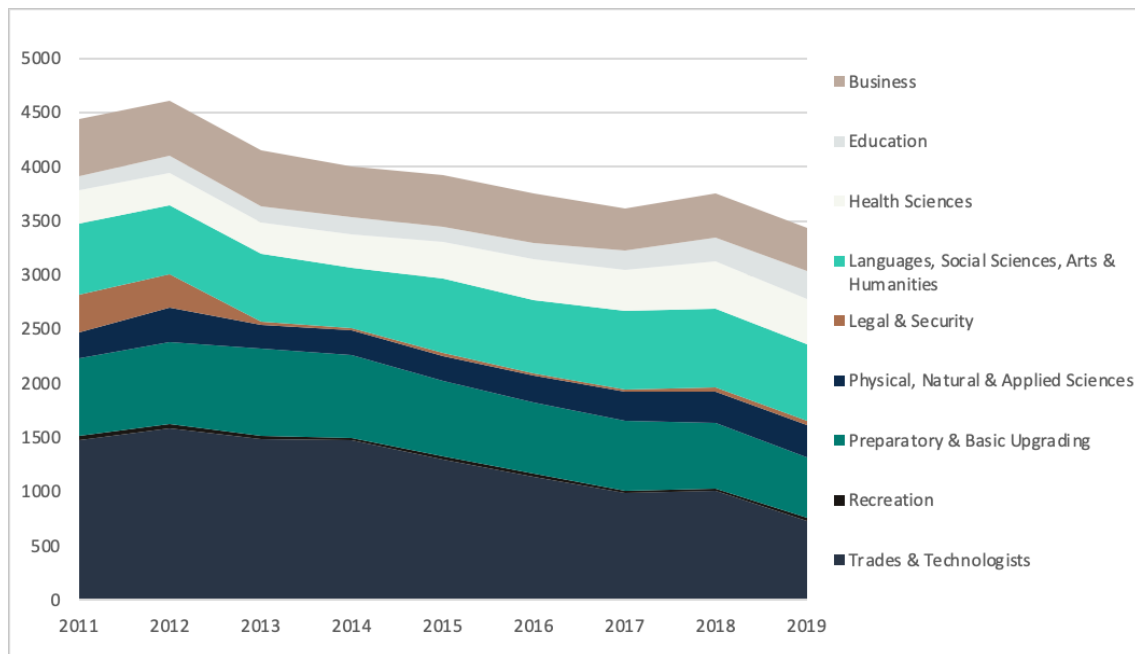
Source: Wood Buffalo Regional Dashboard Post-secondary Enrolment developed by Alberta Advanced Education

2.5.4.Educational Attainment

The educational attainment in a community is not only based on the local students as migrants bring additional qualifications that may not be available locally. The Statistics Canada Federal Census includes an overview of the educational attainment of residents in the community at that time. While FMWB has seen a decrease in enrolments, the educational attainment of the residents has been increasing overtime. In 2006 54.7% of the local population, or 22.940 people, had some level of post-secondary training, by 2016 is had increased to 58.9%, or 34,475 people. Residents who had attended University had the largest growth, going from 6,945 in 2006 to 12,655 in 2016, showing an increase of 82% in 10-years. Conversely those with less than a high school diploma was the only group to decline in the 10-years, going from 8,705 people in 2006 to 6,920 in 2016, which is a 21% decline in a 10-year period.

FMWB Education Attainment
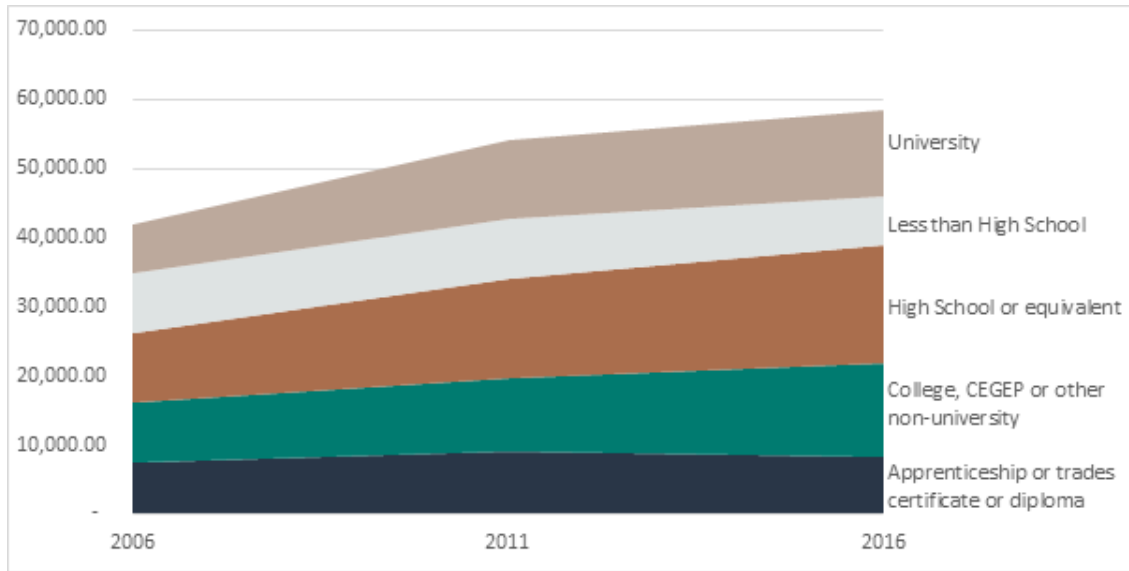
Source: Statistics Canada Federal Census

3. Employer Survey

This section provides an overview of selected findings from the survey of employers in FMWB.

The employer survey engaged stakeholders from all municipalities, industries and firm sizes to guarantee reasonable coverage of the employment base in FMWB.

- Overall, 245 employers completed the survey.
- 188 small employers, 26 medium and 31 large employers completed the survey.[11]
- 46 employers who completed the survey, self-reported as a Non-profit organization.

Employers by Firm Size

Employer Size (employees)	Employers Surveyed	Total # Employers	Sampling Rate
Small (<50)	188	1,619	12%
Medium (50-199)	26	93	28%
Large (200+)	31	49	63%
Total	245	1,761	14%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

While the overall sampling rate was 14% of all employers, the sampling rate varied by industry. Industries with the highest sampling rates included: Utilities (60%), Education services (52%), Mining, quarrying, and oil and gas extraction (38%), Public administration (33%), Manufacturing (29%), and Arts, entertainment and recreation (21%).

Of the total non-profit organizations, industries with the highest sampling rate included: Other services (33%), Healthcare and social assistance (20%), and Educational services (18%).

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[11] Employers from a range of firm sizes participated in the survey, including Small employers with 1 - 49 employees, Medium employers with 50 - 199 employees, and Large employers with 200 or more employees.

Employer Survey Response Rate by Industry

	Response Rate %
11 Agriculture, forestry, fishing and hunting	20%
21 Mining, quarrying, and oil and gas extraction	38%
22 Utilities	60%
23 Construction	17%
31-33 Manufacturing	29%
41 Wholesale trade	10%
44-45 Retail trade	8%
48-49 Transportation and warehousing	13%
51 Information and cultural industries	18%
52 Finance and insurance	14%
53 Real estate and rental and leasing	8%
54 Professional, scientific and technical services	8%
55 Management of companies and enterprises	50%
56 Administrative and support, waste management and remediation services	15%
61 Educational services	52%
62 Health care and social assistance	7%
71 Arts, entertainment and recreation	21%
72 Accommodation and food services	13%
81 Other services (except public administration)	16%
91 Public administration	33%
Total	14%

The industries which are estimated to have responses representing 50% or more of the employees in the region are: Education Services (96%), Public administration (82%), Transportation and warehousing (81%), Accommodation and food services (67%), Agriculture, forestry, fishing and hunting (57%), Other services (55%), and Utilities (50%).

Response Rate by Percentage of Employees by Industry

	Response Rate %
11 Agriculture, forestry, fishing and hunting	57%
21 Mining, quarrying, and oil and gas extraction	42%
22 Utilities	51%
23 Construction	25%
31-33 Manufacturing	5%
41 Wholesale trade	54%
44-45 Retail trade	11%
48-49 Transportation and warehousing	81%
51 Information and cultural industries	18%
52 Finance and insurance	7%
53 Real estate and rental and leasing	12%
54 Professional, scientific and technical services	29%
55 Management of companies and enterprises	50%
56 Administrative and support, waste management and remediation services	52%
61 Educational services	96%
62 Health care and social assistance	36%
71 Arts, entertainment and recreation	4%
72 Accommodation and food services	67%
81 Other services (except public administration)	55%
91 Public administration	82%
Total	48%

3.1.   Voluntary Turnover

Question 1: Voluntary Turnover

Question:	Have any employees left your organization in the last 12 months as a result of voluntary turnover?
Answer:	Twenty eight percent of Fort McMurray Wood Buffalo employers reported employees had voluntarily left their company in the prior year.

Overall, 28% of FMWB employers reported employees had left their company in the 12 months prior to their survey as a result of voluntary turnover.[12] Large employers experienced the most voluntary turnover with 51% reporting employees had voluntarily left in the prior year, as shown in the table below. In comparison, 30% of non-profit organizations reported voluntary turnover in the 12 months prior to the survey.

Employees voluntarily leave their jobs for various reasons. In the survey some of the reasons identified that employers are voluntarily leaving their jobs include: employees leaving for another job, for higher wages, for more work hours, for a more permanent position, to advance their career, to pursue further education, and to move to a different community.

Percentage of Fort McMurray Wood Buffalo employers reporting voluntary turnover in the 12 months prior to the survey

Employer Size (employees)	Experienced Turnover	Total # Employers	%
Small (<50)	425	1,619	26%
Medium (50-199)	41	93	44%
Large (200+)	25	49	51%
Total	491	1,761	28%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

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[12] Voluntary turnover does not include retirement, maternity/paternity leave, disability, layoff or termination.

Question 2: Voluntary Turnover

Question:	How many employees have left your company as a result of voluntary turnover?
Answer:	Overall, Fort McMurray Wood Buffalo employers reported the turnover rate was 4.1%.

Overall, FMWB employers reported voluntary turnover of approximately 3,209 employees in the 12 months prior to the survey.

This equates to a turnover rate of 4.1%.[13] The Administrative and support, waste management and remediation services industry has the highest voluntary turnover rate at 18%, as shown in table below.

This survey result is reflective of trends in the retail sector, which due to the part time or seasonal nature of work tends to have higher turnover. Other industries with turnover rates above the overall rate of 4.4% include: Other Services (14.7%), Healthcare and social assistance (11.2%), Real estate and rental and leasing (9.3%), Arts, entertainment and recreation (9.0%), and Retail trade (7.3%).

The Agriculture, forestry, fishing and hunting, Finance and insurance, Management of companies and enterprises, and Public administration industries reported no turnover.

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[13] Total turnover divided by total employees.

Number of FMWB employees who left as a result of voluntary turnover in the 12 months prior

Industry (employees)	Total (All)
11 Agriculture, forestry, fishing and hunting	0
21 Mining, quarrying, and oil and gas extraction	1,096
22 Utilities	26
23 Construction	349
31-33 Manufacturing	27
41 Wholesale trade	12
44-45 Retail trade	243
48-49 Transportation and warehousing	140
51 Information and cultural industries	6
52 Finance and insurance	0
53 Real estate and rental and leasing	77
54 Professional, scientific and technical services	60
55 Management of companies and enterprises	-
56 Administrative and support, waste management and remediation services	305
61 Educational services	32
62 Health care and social assistance	266
71 Arts, entertainment and recreation	75
72 Accommodation and food services	227
81 Other services (except public administration)	268
91 Public administration	0
Total	3,209

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

Question 3: Voluntary Turnover

Question:	Which occupations have experienced the most voluntary turnover?
Answer:	Petroleum, Gas and Chemical Process Operators were identified as having the most voluntary turnover.

FMWB employers were asked to specify the occupations that experienced the most voluntary turnover, the top results are shown in the table below.

These occupations were reported most frequently in part because they comprise a large share of employment in the region due to the industry mix of employers. Petroleum, Gas and Chemical Process Operators (10%), Security guards and related security service occupations (10%), Heavy equipment operators (8%), Crane operators, (5%), Other Professional Engineers (5%), Truck drivers (5%) were the occupations that employers specified had the most turnover.

Top 10 Occupations that experienced the most voluntary turnover

Occupation (employees)	Turnover (All)
Petroleum, Gas and Chemical Process Operators	309
Security guards and related security service occupations	301
Heavy Equipment Operators (Except Crane)	236
Crane Operators	169
Other Professional Engineers, n.e.c.	141
Truck Drivers	141
Automotive Service Technicians, Truck and Bus Mechanics and Mechanical Repairers	101
Registered nurses and registered psychiatric nurses	83
Administrative Clerks	71
Construction Trades Helpers and Labourers	65
Total	1,617

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

3.2. Vacant Positions

Question 4: Vacant Positions

Question:	Do you currently have any vacant positions that you are actively recruiting for?
Answer:	Twenty percent of Fort McMurray Wood Buffalo employers reported vacant positions.

Overall, 20% of FMWB employers reported they had vacant positions that needed to be filled at the time of their survey. 69% of Large employers reported they had vacant positions they are actively recruiting, as shown in the table below. 31% of Medium employers and 18% of Small employers reported they had vacant positions they are actively recruiting.

Number of employers with vacant positions they are actively recruiting

Employer Size (employees)	Experienced Turnover	Total # Employers	%
Small (<50)	286	1,619	18%
Medium (50-199)	29	93	31%
Large (200+)	34	49	69%
Total	349	1,761	20%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

Question 5: Vacant Positions

Question:	How many positions are you actively recruiting for?
Answer:	Overall, FMWB employers reported the vacancy rate was 3.9%.

Overall, FMWB employers reported approximately 3,112 vacant positions at the time of the survey, this equates to a vacancy rate of 3.9%.[14] The Accommodation and food services industry has the highest vacancy rate at 19.3%, as shown in table on the following page. This survey results are partially reflective of the timing of the survey, as employers in this industry tend to be hiring in the summer months.

Other industries with vacancy rates above the overall rate of 3.9% include: Information and cultural industries (13.1%), Other services (10.1%), Transportation and warehousing

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[14] Total vacant positions divided by all positions (vacant and occupied).

(7.9%), Healthcare and social assistance (7.1%), Construction (4.2 %) and Professional, scientific and technical services (4.1%).

Five industries reported no vacancies including: Agriculture, forestry, fishing and hunting, Utilities, Wholesale trade, Management of companies and enterprises, and Arts, entertainment and recreation.

Fort McMurray Wood Buffalo: Number of vacant positions and vacancy rates

Industry	# Vacant Positions	Total Employees	Vacancy Rate %
11 Agriculture, forestry, fishing and hunting	0	159	0.0%
21 Mining, quarrying, and oil and gas extraction	447	35,231	0.0%
22 Utilities	0	329	0.0%
23 Construction	636	15,016	4.2%
31-33 Manufacturing	13	1,167	1.1%
41 Wholesale trade	0	344	0.0%
44-45 Retail trade	69	3,302	2.1%
48-49 Transportation and warehousing	252	3,206	7.9%
51 Information and cultural industries	22	168	13.1%
52 Finance and insurance	22	360	0.0%
53 Real estate and rental and leasing	13	834	1.6%
54 Professional, scientific and technical services	89	2,188	4.1%
55 Management of companies and enterprises	0	520	0.0%
56 Administrative and support, waste management and remediation services	16	1,695	0.9%
61 Educational services	69	1,761	3.9%
62 Health care and social assistance	170	2,382	7.1%
71 Arts, entertainment and recreation	0	837	0.0%
72 Accommodation and food services	1078	5,578	19.3%
81 Other services (except public administration)	184	1,820	10.1%
91 Public administration	32	1,911	1.7%
Total	3,112	78,808	3.9%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

Question 6: Vacant Positions

Question:	Which occupations have experienced the most vacancies?
Answer:	Cooks were identified as the occupation with having the most vacant positions.

FMWB employers were asked to specify the occupations that had the most vacant positions. Based on the employer survey, occupations in the Accommodation and food services industry and Mining, oil and gas extraction had the most vacant positions. The the occupations with the most vacancies are shown in the table below.

Top 10 Vacant Occupations

Occupation (employees)	Top Vacant Positions
Cooks	246
Construction Trades Helpers and Labourers	236
Light Duty Cleaners	231
Food Counter Attendants, Kitchen Helpers and Related Occupations	222
Crane Operators	220
Janitors, Caretakers and Building Superintendents	166
Administrative Clerks	163
Truck Drivers	161
Heavy Equipment Operators (Except Crane)	158
Contractors and Supervisors, Electrical Trades and Telecommunications Occupations	127
Total	1,929

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

3.3.   Recruitment Challenges

Question 7: Recruitment Challenges

Question:	Have you had difficulty recruiting qualified employees in the last 12 months?
Answer:	Overall, 33% of Fort McMurray Wood Buffalo employers reported having difficulty recruiting qualified employees in the prior year.

Overall, 33% of FMWB employers reported having difficulty recruiting qualified employees. Medium employers reported having the most difficulty recruiting qualified employees (35%), as shown in the table below. Thirty four percent of Large employers reported having difficulty recruiting qualified employees, followed by 33% of Small employers.

Thirty five percent (16) of FMWB non-profit employers reported difficulty recruiting qualified employees in the prior year.

Number of employers reporting difficulty recruiting in the 12 months prior to the survey

Recruitment Challenges (employees)	Small (<50)	Medium (50-199)	Large (200+)	Total (All)
Yes, had difficulty recruiting qualified employees	33%	35%	34%	33%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

Question 8: Recruitment Challenges

Question:	What has been your most successful recruitment strategy to find applicants over the last 12 months?
Answer:	Word of mouth/employee referral and Career and classified websites were the most reported recruitment strategies by Fort McMurray Wood Buffalo employers.

The most successful recruitment strategies to find applicants according to FMWB employers include: Word of Mouth/referrals (41%), Career and classified websites (39%), Social media (21%), Company website/internal postings (17%). This demonstrates that job seekers benefit from having technological literacy and networking skills, to connect with employers in the Region.

The Other category includes strategies such as: industry associations and post-secondary institutions. Of the employers surveyed, 7% did not report a recruitment strategy because they did not hire over the last 12 months.

Non-profit employers reported similar strategies with 26% of non-profits reporting word of mouth/referrals as one of the most successful recruitment strategies. Other successful methods for non-profits were career and classified websites (24%) and social media (18%).

Successful recruitment strategies identified by employers

Response to difficulty recruiting (employees)	Small (<50)	Medium (50-199)	Large (200+)	Total (All)
Career and classified websites	36%	50%	45%	39%
Word of mouth/employee referrals	41%	58%	29%	41%
Walk-ins/unsolicited resumes	7%	19%	0%	7%
Social media	0	0	39%	21%
Company websites/internal postings	9%	23%	61%	17%
Industry associations	5%	4%	13%	6%
Signage	1%	0%	0%	0%
Employment Agencies	0	0%	3%	1%
Post-secondary institutions	3%	0%	6%	3%
Job fairs	0%	0%	6%	1%
Other	3%	4%	3%	3%
Unsure	1%	0%	3%	1%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

Question 9: Recruitment Challenges

Question:	How have or will you respond to the difficulty recruiting qualified employees?
Answer:	16% of employers in the Fort McMurray Wood Buffalo reported increased recruiting efforts as the top way to respond to the difficulty recruiting qualified employees.

The following table shows the different strategies used by employers dealing with difficulty recruiting. The three most commonly reported strategies were Increase recruiting efforts (16%), Increased workload for current workers (15%), and hired a less qualified applicant (11%).

Twenty three percent of non-profit employers reported both an Increased workload for current workers and increased recruiting efforts were tied as the top way to respond to difficulty recruiters.

Percentage of employers that reported responding to difficulty recruiting[15]

Response to difficulty recruiting (employees)	Small (<50)	Medium (50-199)	Large (200+)	Total (All)
Increased recruiting efforts	10%	38%	32%	16%
Increased wages/benefits to attract more applicants	6%	8%	6%	7%
Redesigned job to change the required skills	2%	0%	6%	2%
Did not fill job opening	0	0	10%	9%
Hired a less qualified applicant	11%	15%	13%	11%
Outsourced the work	2%	4%	3%	2%
Hired contingent workers, such as temps, contractors, freelancers, etc.	2%	4%	13%	4%
Applied for/hired temporary foreign workers	0	8%	0%	2%
Increased workload for current workers	13%	15%	26%	15%
Redeployed employees to new roles where their skills were more needed	3%	4%	6%	4%
Increased investment in training	6%	8%	10%	7%
Partnered with educational institutions to ensure programs develop candidates with the required skills	1%	4%	3%	2%
Targeted underutilized or new talent pools, such as youth, mature workers, persons with disabilities, Indigenous Peoples, new immigrants, etc.	1%	0%	3%	1%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

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[15] Respondents in the survey were able to select more than recruitment challenge.

3.4. Retention Strategies

Question 10: Retention Strategies

Question:	What has been your most successful employee retention strategy over the last 12 months?
Answer:	Positive work environment and Competitive salary were the most successful retention strategies identified by Fort McMurray Wood Buffalo employers.

The preferred retention strategies varied by firm size. Small employers also identified flexible work measures as another important retention strategy. Medium employers also identified Work/life balances as another important retention strategy. Large employers identified Competitive benefits package as another important strategy.

Both for profit and non-profit firms reported positive work environment as the most successful recruitment strategy. The other most successful retention strategies reported by non-profits were flexible work measures, and interesting/challenging work.

Percentage of employers that reported retention strategies[16]

Retention Strategy (employees)	Small (<50)	Medium (50-199)	Large (200+)	Total (All)
Competitive salary	24%	38%	35%	27%
Positive work environment	39%	35%	42%	39%
Excellent management/supervision	12%	15%	16%	13%
Competitive benefits package	7%	19%	35%	12%
Interesting/challenging work	14%	8%	19%	14%
Flexible work measures	18%	12%	10%	16%
Learning/growth opportunities	0	15%	19%	11%
Cash bonuses	5%	4%	0%	4%
Work/life balance	11%	27%	19%	13%
Housing supportst	9%	0%	10%	8%
Excellent communication	2%	0%	6%	2%
Reward and recognition program	3%	4%	16%	5%
Diversity and inclusion strategies	2%	0%	23%	4%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

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[16] Respondents in the survey were able to select more than retention strategy.

3.5. Underemployed Groups

Question 11: Underemployed Groups

Question:	Does your organization have plans (formal or informal) to recruit people from the following groups in the next 12 months? (Youth, Mature Workers, Persons with Disabilities, Indigenous Peoples, New Immigrants)
Answer:	31% of Fort McMurray Wood Buffalo employers identified they did have plans to recruit people from at least one of these groups in the next 12 months.

As only 31% of respondents indicating plans to recruit from underemployed group indicates a labour market issue. Overall, FMWB employers were least likely to report plans to recruit persons of disabilities with only 9% of respondents. The survey also found that results varied by firm size with large and medium employers most likely to recruit Indigenous people and Small employers most likely to recruit from youth.

Non-profits had a higher portion of respondents planning to recruit from at least one underemployed group in the next 12 months. From the non-profit sector 12% did not have plans to recruit from the underemployed groups, o of this 5% reported no plans to actively recruit in the next year.

Percentage of employers with plans to recruit people from the following groups

Labour Force Group (employees)	Small (<50)	Medium (50-199)	Large (200+)	Total (All)
Youth (15-24)	16%	42%	39%	22%
Mature workers (55+)	7%	31%	29%	13%
Indigenous peoples	13%	54%	65%	24%
New immigrants	7%	35%	19%	11%
Women	13%	46%	39%	20%
Persons with disabilities	5%	19%	23%	9%
Other	4%	12%	3%	4%

Source: Data is from the Fort McMurray Wood Buffalo Region employer survey.

3.6.   Workplace Resources

Question 12: Workplace Resources

Question:	Has your company ever applied for, or does your company have plans to apply for, any of the following workplace resources?
Answer:	39 percent of Fort McMurray Wood Buffalo employers reported applying for or having plans to apply for a workplace resource.

39% of FMWB employers reported applying for or having plans to apply for any workplace resources.

Of employers who applied for or have plans to apply for any workplace resources, the Wage Subsidy Program (29%) was the program most reported by employers of all sizes. The second most reported overall was the Canada Alberta Job Grant (14%), Medium employers (23%), Large employers (19%).

Small employers were the least likely to report plans or previous submissions for the Apprenticeship Job Creation Tax Credit. Medium and large employers were least likely to apply for the Canada Summer Jobs program.

52% of FMWB non-profit employers reported applying for or having plans to apply for a workplace resource, with 30% applying for two or more.

Percentage of employers who have applied for or have plans to apply for the following workplace resources

Workplace Resource	Small (<50)	Medium (50-199)	Large (200+)	Total (All)
Canada-Alberta Job Grant (CAJG)	14%	23%	19%	16%
Canada Summer Jobs	11%	8%	6%	10%
Apprenticeship Job Creation Tax Credit	4%	12%	13%	6%
Wage Subsidy Program	24%	54%	32%	29%
Canada Emergency Commercal Rent Assistance	12%	19%	0%	11%
Other	2%	0%	6%	2%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

Question 13: Workplace Resources

Question:	Has your company ever applied for, or does your company have plans to apply for, any of the following workplace resources?
Answer:	61% of employers reported they had never applied for any workplace resources.

Overall, 61% of FMWB employers reported they had never applied for and do not have plans to apply for any workplace resources. The low uptake of workplace resource amongst employers who participated in the survey represents a labour market issue.

Of the 23% of employers who identified a reason for not accessing workplace resources reported they Don't think they qualify, 46% . In addition, another 14% identified that they Never heard of them and 7% reported they Don't know enough about them.

Percentage of employers who reported reasons they have never applied for or do not have plans to apply for workplace resources

Workplace Resource	Small (<50)	Medium (50-199)	Large (200+)	Total (All)
Never heard of them	12%	0%	2%	14%
Don't know enough about them	7%	0%	0%	7%
Adminstrative burden	4%	0%	0%	4%
Don't think we qualify	40%	2%	4%	46%
Don't have the budget	2%	0%	0%	2%
Other	25%	2%	2%	28%

Source: Data is from the Fort McMurray Wood Buffalo employer survey.

4. Stakeholder Engagement

The engagement process captured the perspectives of various key stakeholders throughout the FMWB, across industry, municipality and firm size. As a result of the Covid-19 pandemic all stakeholder engagement was conducted virtually and over the telephone.

Stakeholder engagement included the following engagement activities:

- Initial one-on-one key person interviews (20 discussions)
- Stakeholder discussion groups (8 sessions)
- Verification Engagement Sessions (2 sessions)

4.1. Key Person Interviews

Early in the process, the consulting team engaged with 15-20 different regional stakeholders in one-on-one virtual discussions. The purpose of these discussions was to gather input on the key labour market issues and opportunities from their perspective. This process was valuable to understand key issues and helped to inform the questions to be included in the employer survey.

4.2. Stakeholder Discussion Groups

Following the employer survey, 8 discussion groups were held to gain further information on some labour market issues and opportunities identified during the employer survey.

The discussion groups focused on exploring the labour force challenges and opportunities in the FMWB from the perspective of employers, across industry, municipality and firm size.

The employer survey highlighted a need for more qualitative detail about certain labour market topics. These topics informed the areas for the discussion groups, which were as follows:

- Support/Service Sector
- Industrial Sector
- Oil/Large Construction Sector
- Skills & Training
- Rural & Indigenous
- Public Sector
- Non-Profit Sector

The following section outlines some of the key findings from the stakeholder discussion groups.

Support/Service Sector

- Challenges to get people back to work/competing with CERB benefits.
- Closures/openings due to Covid-19 have led to swings in demand.
- The support services sector has utilized Wage Subsidy programs.
- Hard to complete with large employers in the Region.

Industrial Sector

- Early in pandemic many projects delayed/cancelled which led to lay offs.
- This year there is a lot of pent up demand for which employers will need to do hiring to keep up.
- Some employers hired extra to have capacity for when people are in quarantine. This was challenging for those in specialized occupations.
- With travel restrictions less labour coming from around Canada.
- Costs associate with training and relocating new staff.
- Difficult to get people to relocate for some positions and people are moving to Edmonton and Calgary and coming up to do work when needed.
- Would like to target younger demographic for entry level, labour positions.

Oil/Large Construction Sector

- Early in pandemic there was a slowdown.
- Decision to proceed with large projects that already have investment.
- Turnaround was initially deferred but is back on schedule.
- Expecting more technology and digital implementation in the short-medium term.
    - This includes a need for more digital/IT/analyst type positions.
- Difficult to find technical roles locally.
- Attraction to Region can also be a challenge for recruitment.
- Employers work with some local stakeholders to fill positions (Careers Next Gen, RAP, Pathways, Keyano) - open to more collaboration
- Image of the energy sector (industry and environmental impacts) and ability to continue to attract and retain qualified workers in the region.

Skills & Training

- Many students are not able to get work experience during Covid-19.
- Many organizations have had training budget cuts.
- Training providers have had funding reductions.

- Professional development related to wellness and mental health is in demand.
- More opportunities for flexible training - virtual/in-person.
- Programs that are still in demand but can no longer operate. (i.e.Water/Wastewater operator, Non-destructive testing)
- More connection between students > training/experience > job.
- More understanding of the needs of larger employers in the region (workforce requirements, timing).
- Barriers to accessing training include: access to childcare, cost, and transportation.

Rural & Indigenous

- Rural communities are also finding it difficult to hire locally and are looking outside of the Region. Need to provide them with food and housing.
- Essential skills/life skills training programs.
- Wages are typically higher than in Fort McMurray but this creates business feasibility challenges.
- Transportation is a challenge if bringing workers from Fort McMurray to rural communities for work.
- Employers focus on retention to keep existing staff as that is easier than recruiting.
- Housing is an issue in some rural communities and makes it challenging to recruit workers.
- Desire to have more collaboration among employers and training providers and employment agencies in the region.
- Opportunities to connect underemployed groups to training opportunities.
- Organizations need to be more purposeful - times have changed in the region and need to plan accordingly.
- Look at opportunities for diversification (i.e. tourism, agri-business)

Public Sector

- During the pandemic tried to maintain staff levels.
- Wages and Compensation packages are considered near the top in the Region.
- Always look to hire locally first.

Non-Profit Sector

- Challenges in reduced funding to sector
- Challenges to fundraising as many events were previously in-person
- Employee fatigue - with work at home and less interaction

- Difficult to compete on wages/compensation packages with other large employers in the region.
- Retention:
    - Employers need to find creative ways to motivate staff with working from home.
    - Employee check-ins (survey, one on one, virtual lunches)
    - Adjust policies around how people can work.
    - Customize Statutory Holidays.
    - Inclusive/diversity movement to encourage diversity within organization.
    - Time off with pay instead of wage increase.
- Recruitment:
    - Hiring without face-to-sface meeting
    - On-boarding/training takes much longer than pre-pandemic.
    - Challenge of trying to pull back perks that existed before.
    - Try to be an employer of choice (Work culture/build your career/professional development opportunities)
- Many employers were able to transition to online services/programming.
- Shortage of skilled childcare workers
    - Loss of Northern Living Allowance has made it more difficult to recruit.s

4.3.Verification Engagement

Two verification engagement sessions were held with a mix of regional employers and service providers. The purpose of these sessions was to test draft strategies and discuss potential opportunities to address labour market issues and challenges.

Below are some of the key themes, issues and potential opportunitiies identified during the sessions.

Verification Engagement Key Findings

Theme	Issue	Potential Opportunity
Job Vacancies	How can employers connect with job seekers within the Region?	- Regional online job board - Job board by sector - Promote with high schools

Theme	Issue	Potential Opportunity
	How to attract workers into in demand fields (childcare, drivers)	- Funding options for training - Government incentives to attract workers in this field. - Promote with students considering career options.
	Lower wage workers	- Potential to advocate for any incentive supports from Government or Municipality?
	Government CERB is decentivizing people from going back to work.	
Regional Collaboration	Employers outside of Urban Services Area face different challenges and often are isolated.	- Connect them with employers in their sector. - Host virtual events that they could attend.
Barriers to hiring	Cost of training	- Awareness of programs to support training new hires.
	Remote hiring	- Virtual interviews - Educating potential hires of remoteness and job prior to hiring. - Offer housing/food as incentive
	Volume of resumes	- Local/Regional Job Boards would be more targeted.
	Potential candidates lack basic sklls	- Better understanding of employer expectations. - Offer training in life skills, on the job skills.
Underemployed Groups	Youth: - Higher unemployment rates - High school completion rates	- Need to establish process to connect with local high school students. - Encourage high school completion.
	Mature Workers: -require higher wages, need more flexible schedule - lack tech/computer skills.	- Offer computer skills/training to help when transitioning careers.
	Indigenous: - how to connect with pool of workers ready to work.	- Establish some links with rural communities and employers for hiring.

Theme	Issue	Potential Opportunity
	Women: - Often a secondary income and need a flexible schedule. - Child care can be a barrier for women/working parents.	
Cost of Living	Loss of Northern Living Allowance for Keyano College and childcare workers. - For some child care workers the loss of living allowance was a significant loss of income (>20%).	- Municipal support for sectors that have lost the Northern Living Allowance. - Other incentives that employers can provide to attract workers.
Barriers for job seekers	Transportation: - Lack of drivers license for rural residents. - Lack of bus service for residents to commute into FMM.	- Regular bus service to communities outside of FMM (Fort Mackay, Anzac).
	- Childcare	- Attract more skilled workers to childcare field with Level 2 & 3 Certification.
	Housing: - For rural community residents - For low wage workers.	- Rural employers offer housing/food as incentives to work.
	- Lack of life skills, experience in resume/interviews	- Offer job preparation training. - Life skill training. - (Virtual or in remote communities)
	- Awareness of employer expectations	- Awareness of drug and alcohol testing - Review job duties, daily responsibilities.
	Internet stability in rural communities when doing virtual training.	

5. Regional Employment Forecast

This section provides the overview of the 5-year labour forecast for FMWB. The data is based on public sources and updated based on results from the employment survey. The forecasts are developed using Applications Management Consulting Ltd.'s Employment Demand Forecasting Model and Labour Redistribution Model.

- By 2025, employment demand in FMWB is forecasted to be between 78,728 and 93,073 people. Of this between 43,131 and 47,321 are expected to be from the local population

- On average, the broad occupation categories that have the largest growth in employment demand are the Trades, transport and equipment operators and related occupations, Sale and services occupations, and Natural and applied sciences and related occupations.

- The occupations forecasted to have the largest local supply gap during the forecast period are Trades, transport and equipment operators and related occupations, and Sale and services occupations. If the supply does not shift to meet the demand employers may fill the positions through non-local labour supplies.

5.1. Forecast Overview

The forecasts have a 2020 base year which was generated using the 2016 census, the FMWB employer survey and other publicly available data. The forecast draws on two driver industries to promote economic growth in the region, with varried growth assumptions in the three scenarios. Growth in the remaining industries is informed from Applications Management Consulting LTD's demand and population models which estimates the required growth to fill the demand from the driver industries and the changing population. The two driver industries were:

- The first is the Mining, quarrying, and oil and gas extraction sector. The forecasts were developed based on publicly reported planned projects in the region, with varied assumptions on the timing of construction and operations during the forecast period. The high scenario assumes that there will be no additional delays for the projects planned for the forecast period, the medium scenario assumes many projects do begin though many with delayed construction, and finally the low scenario assumes that no projects that are not currently underway or were confirmed during the consultation will continue.

- The second driver industry is Tourism which was identified in the 2018 FMWB Economic Development Annual report an done of the hardest hit by the COVID-199 pandemic. The three scenarios all a period of recovery, which

is longest in the low scenario and shortest in the low scenario. Additional economic growth was incorporated following the recovery period, the additional growth is based on historical.

Additional details on the methodology for the forecasts are available in Appendix B

5.1.1.Local Employment

In 2020, the local FMWB employment was 40,952. In the low scenario the local employment is forecasted to grow by 1% a year, reaching 43,131 by 2025. In the medium scenario the annual growth is 1.9% brining the 2025 employment up to 45,052. Finally in the high scenario the annual growth is expected to average 2.9% brining the local employment up to 47,321. The following chart shows the annual growth of the three scenarios, and the historical employment reported by the census in 2016.

FMWB Local Employment
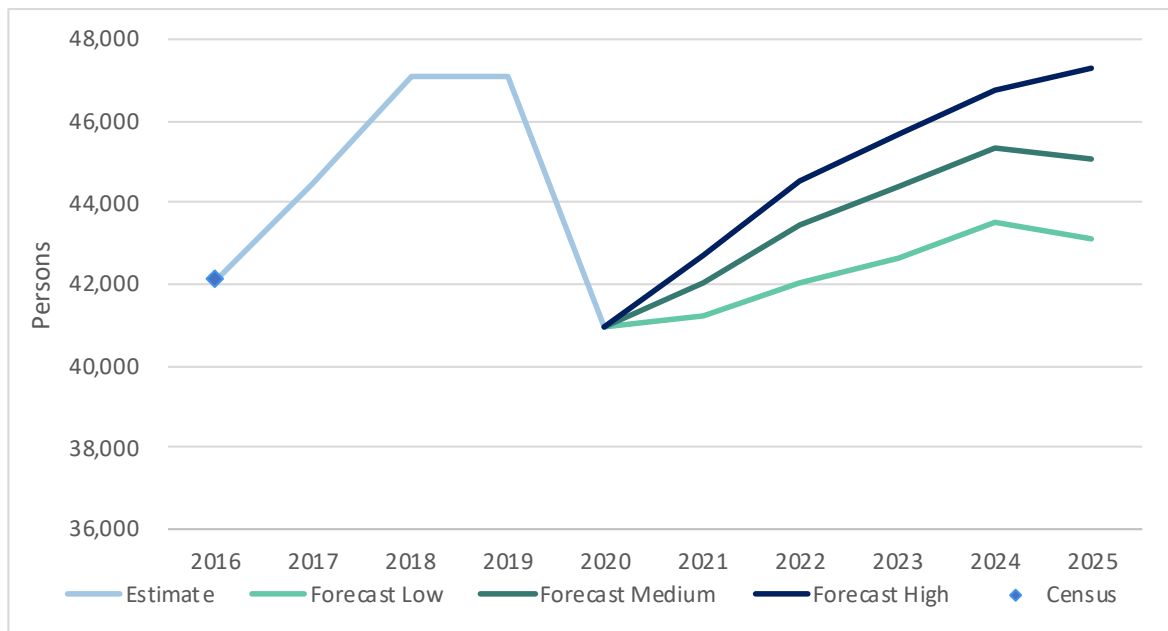
Source: Estimates prepared by Applications Management Consulting LTD.

5.1.2.Total Employment

The total employment incorporates both the employment of the local population as well as the additional employment filled by the shadow population. The shadow population primarily lives in camp accommodation; however, a small portion does reside within the municipalities. In 2020, the shadow population was 37,856 putting the total employment in FMWB at 78,808 jobs. In the low scenario there will be a slight decline in 2025 compared to 2020, this is due to the minimal industry investment included in the scenario and the modelled maintenance profile. The low scenario estimates the shadow employment in 2025 to be 35,598 putting the total employment at 78,728, with an average annual growth rate of 0%. The medium scenario assumes more industry investment

occurring during the forecast period, which puts the 2025 shadow employment at 39,832, and total employment reaching 84,884 in 2025, for an annual growth rate of 1.5%. Finally, the high scenario assumes a high level of industry investment within FMWB increasing the shadow employment to 45,752 in 2025, this puts the total employment at 93,073 for an average annual growth rate of 3.4%. The following chart shows the total employment for the three scenarios.

FMWB Total Employment
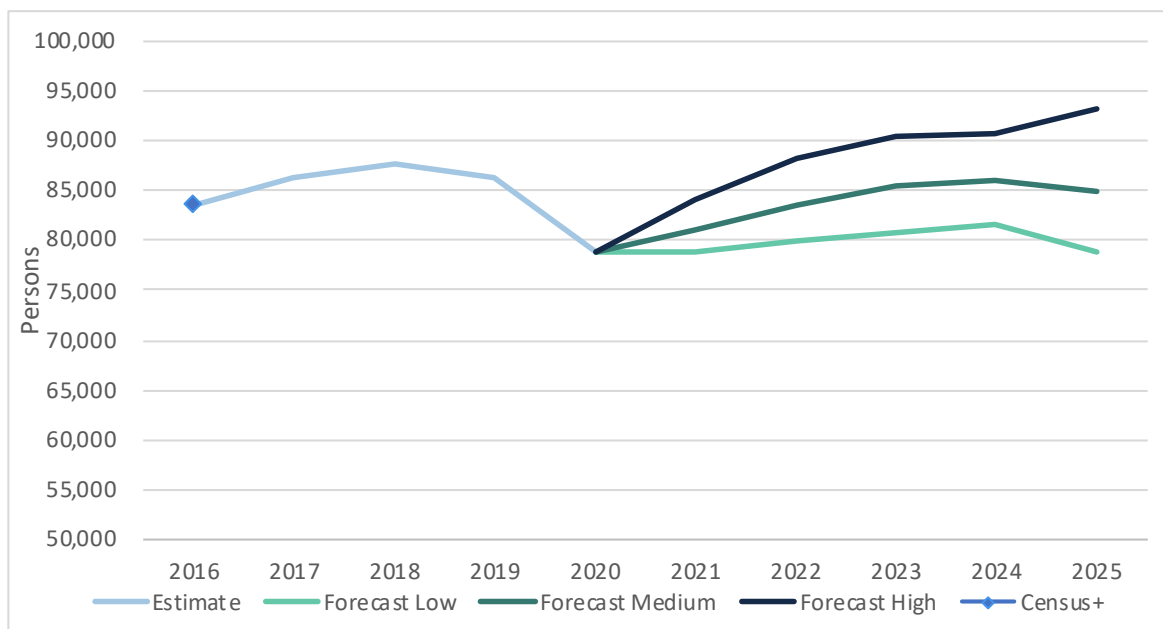
Source: Estimates prepared by Applications Management Consulting LTD.

5.1.3.Employment by Industry

In FMWB, Mining, quarrying, and oil and gas extraction industry is the largest direct employer of the local and shadow population. In 2020, the sector directly accounted for 32% of the local employment and 47% of the total employment. Other industries historically linked to the shadow population include construction, which was 10% of local employment and 19% of total in 2020, and accommodations and food services which is 7% of local employment and 6% of total employment.

The following table shows the industry breakdown for the local employment in FMWB for the 2020 base year and the forecasted employment in 2025 for each scenario. The table also presents the employment for the shadow population, separated into the project accommodations and residential shadow population.[17] The shadow employment is

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[17] Project Accommodations refers to the people who reside at project camps when they are working in the region, the residential population refers to the portion of the shadow population that reads within the communities when in the region.

primarily found in Mining, quarrying, and oil and gas extraction, Construction, Accommodations and food services, and Transportation and Warehousing.

Industry Employment by Scenario

Industry	2020	Low 2025	Medium 2025	High 2025
11 Agriculture, forestry, fishing, and hunting	159	172	176	185
21 Mining, quarrying, and oil and gas extraction	13,201	13,579	14,403	15,294
22 Utilities	329	346	351	358
23 Construction	4,281	4,435	4,816	5,429
31-33 Manufacturing	1,167	1,183	1,208	1,252
41 Wholesale trade	344	346	350	355
44-45 Retail trade	2,952	3,173	3,239	3,308
48-49 Transportation and warehousing	1,574	1,648	1,760	1,951
51 Information and cultural industries	168	183	187	191
52 Finance and insurance	360	392	402	412
53 Real estate and rental and leasing	834	894	912	931
54 Professional, scientific, and technical services	2,188	2,269	2,293	2,319
55 Management of companies and enterprises	520	523	523	524
56 Administrative and support, waste management and remediation services	1,695	1,815	1,851	1,889
61 Educational services	1,761	1,902	1,944	1,989
62 Health care and social assistance	2,382	2,539	2,585	2,634
71 Arts, entertainment, and recreation	836	866	874	883
72 Accommodation and food services	2,645	3,057	3,292	3,452
81 Other services (except public administration)	1,645	1,748	1,778	1,810
91 Public administration	1,911	2,061	2,106	2,153
Sub-Total	40,952	43,131	45,050	47,319
Temporary Worker Project Accommodations	34,356	31,883	36,002	41,826
Mobile Workers	3,500	3,715	3,830	3,926
Sub-Total	37,856	35,598	39,832	45,752
Total	78,808	78,729	84,882	93,071

Source: Estimates prepared by Applications Management Consulting LTD.

5.2. Employment by Community

The forecast for FMWB reports the employment across all of the communities within the region. The largest community is the Fort McMurray Urban Services Area (USA) accounting for 38,638 jobs, or 94%, of the 2020 local employment. The next largest communities are Fort Chipewyan, Saprae Creek Estates, and Anzac accounting for a combined additional 1,223 jobs, or 3% of the 2020 employment. The following table shows the breakdown of the local employment by community within FMWB for the 2020 base year and the forecasted employment for 2025 by scenario.

Employment by Community by Scenario

Community	2020	Low 2025	Medium 2025	High 2025
Fort McMurray (USA)	39,201	41,292	43,157	45,357
Anzac	228	239	249	262
Conklin	42	45	46	48
Draper	-	-	-	-
Fort Chipewyan	324	346	356	368
Fort Fitzgerald	-	-	-	-
Fort McKay	-	-	-	-
Gregoire Lake Estates	159	163	165	167
Janvier	47	51	52	53
Saprae Creek Estates	358	377	394	415
Allison Bay 219	40	41	42	43
Chipewyan 201A	7	8	8	8
Dog Head 218	12	12	13	13
Fort Mackay	323	332	336	341
Gregoire Lake 176	63	67	69	72
Gregoire Lake 176A	24	25	27	29
Janvier 194	124	131	137	145
Old Fort 217	-	-	-	-
Thabacha Náre 196A	-	-	-	-
Total	40,952	43,129	45,051	47,321

Source: Estimates prepared by Applications Management Consulting LTD.

5.3. Employment by Occupation

Each scenario provides an overview of the employment needs by industry and occupation. Throughout the forecasts demand for occupations fluctuate depending on the shifting needs of the local industry. As the demand for workers fluctuate some occupations will see higher demand in the middle of the forecast compared to the end. The following table looks at the top 15 occupations from the forecast with the maximum employment growth required in each scenario. The maximum is important as it represents the most individuals an occupation would require at a single time in the forecast.

Assuming the occupation demand peaked at the same point in time for all occupations the local labour pool would require at least 6,462 additional employees in the high scenario, 4,704 in the medium and 2,752 in the low scenario.

Top 15 Occupations by Increased Demand for Local Employment

Occupations	High	Medium	Low
7521 Heavy equipment operators (except crane)	534	397	196
7611 Construction trades helpers and labourers	214	148	67
6711 Food counter attendants, kitchen helpers and related support occupations	179	143	92
7511 Transport truck drivers	173	108	56
9232 Central control and process operators, petroleum, gas and chemical processing	159	117	59
6322 Cooks	131	104	67
6513 Food and beverage servers	123	98	63
6733 Janitors, caretakers and building superintendents	121	90	62
7312 Heavy-duty equipment mechanics	119	86	45
7271 Carpenters	109	75	33
0631 Restaurant and food service managers	107	86	55
6421 Retail salespersons	103	81	61
9241 Power engineers and power systems operators	101	74	38
6731 Light duty cleaners	99	77	52
1221 Administrative officers	90	62	36
Sub-Total	2,361	1,747	982
Share of total	37%	37%	36%
Total	6,462	4,704	2,752

As these occupations have the highest demand growth in the forecast period employers will want to ensure they remain competitive to attract new staff. Wages is one of the most important considerations in a regions competitiveness for an industry. The following table compares the FMWB starting and top wages, to the provincial average, both informed by the 2018 Alberta Wage and Salary Survey. When the hourly wages are within a dollar of each other they are considered on par.

Top 15 Occupations by Increased Demand for Local Employment - Wages

Occupations	Starting Wages	Top Wages	High	Medium	Low
7521 Heavy equipment operators (except crane)	Below Alberta	Above Alberta	534	397	196
7611 Construction trades helpers and labourers	Above Alberta	Above Alberta	214	148	67
6711 Food counter attendants, kitchen helpers and related support occupations	On Par	Below Alberta	179	143	92
7511 Transport truck drivers	Above Alberta	Above Alberta	173	108	56
9232 Central control and process operators, petroleum, gas and chemical processing	No Data	No Data	159	117	59
6322 Cooks	On Par	Below Alberta	131	104	67
6513 Food and beverage servers	On Par	On Par	123	98	63
6733 Janitors, caretakers and building superintendents	On Par	Above Alberta	121	90	62
7312 Heavy-duty equipment mechanics	Above Alberta	Above Alberta	119	86	45
7271 Carpenters	Below Alberta	Below Alberta	109	75	33
0631 Restaurant and food service managers	On Par	Below Alberta	107	86	55
6421 Retail salespersons	On Par	Below Alberta	103	81	61
9241 Power engineers and power systems operators	No Data	No Data	101	74	38
6731 Light duty cleaners	On Par	Above Alberta	99	77	52
1221 Administrative officers	Above Alberta	Above Alberta	90	62	36

The non-profit sector reported starting wages ranging from $15 to $60.11, while the full range of starting wages for FMWB was reported as $15 to $110. The median starting wage for the non-profit sector was $3.12 higher than the median wage for FMWB. For the top wages the non-profit sector reported a range of $17 to $80, while employers in FMWB reported a full range from $15 to $135. The median top wage for the non-profit sector were $1.37 an hour less than the median wage for FMWB. The table below shows the range for the top and starting wages for the non-profit sector and for FMWB as a whole, and the average wage for some example occupations.

Non-Profit Wages vs. Total FMWB Wages

Indicator	Non-Profit Starting Wages	FMWB Starting Wages	Non-Profit Top Wages	FMWB Top Wages
Range	$15 - $60	$15 - $110	$17 - $80	$15 - $135
Median	$28.12	$25.00	$38.09	$36.00

Source: Data is from the Fort McMurray Wood Buffalo employer survey

Selected Occupations in Non-Profit Sector[18]

Indicator	Non-Profit Starting Wages	Alberta Starting Wages	Non-Profit Top Wages	Alberta Top Wages
Executive director	$39.00	$58.22	$51.50	$53.34
Social Workers	$25.00	$31.68	$35.00	$28.27
Early Childhood Educator	$16.50	$17.88	$18.50	$26.32

Sources: Data is from the Fort McMurray Wood Buffalo employer survey, Alberta Wage and Salary Survey

5.4.Employment Gaps

While identifying the top occupation in FMWB provides an understanding of the types of economic activity that will occur, it does not necessarily reflect where there will be gaps between supply and demand in the local labour force. The demand gaps refer to the number of job openings, or vacancies, in FMWB at a given time. The supply gap is number of people looking for a particular type of work. Given that positions are not standardized and require different skills the local labour market will have both supply and demand gaps. The gaps analysis is based on the forecasted employment demanded compared to the projected skills available in the labour market, assuming that an open position will be filled if there is a local job seeker with the required skills.

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[18] Executive director is the 0014 Senior managers - health, education, social and community services and membership organizations occupation. Social Workers is the 4152 Social workers Occupations. Early Childhood Educator is 4214 Early childhood educators and assistants

5.4.1.Employment Demand Gaps

From the employer survey it was reported that there were 3,113 open jobs in FMWB looking for employees. The 10 occupations with the most vacancies account for 73% of the reported openings. Many of the occupations with high vacancies are demanded by more than one industry such as Heavy equipment operators (except crane) which was in demand from five unique industries including, Mining, quarrying, and oil and gas extraction, Transportation and warehousing, and Retail trade. The occupations in the top 10 that had vacancies in only one industry were: Light duty cleaners, Food counter attendants, kitchen helpers and related support occupations, Hotel front desk clerks and Crane operators.

Top 10 Occupation by Open Positions

Occupation	Job Vacancies
7521 Heavy equipment operators (except crane)	338
7611 Construction trades helpers and labourers	258
6322 Cooks	248
6731 Light duty cleaners	231
7511 Transport truck drivers	230
6711 Food counter attendants, kitchen helpers and related support occupations	222
7371 Crane operators	220
6733 Janitors, caretakers and building superintendents	181
6525 Hotel front desk clerks	181
7612 Other trades helpers and labourers	161
Sub-Total	2,269
Share of total	73%
Total	3,113

Source: Estimates reported in the Fort McMurray Wood Buffalo Employer Survey

Over the forecast period the vacancies evolve as new postings are opened based on industry demand, and the number of available employees adjusts as people find jobs, others move to the community, and youth reach the working age. Depending on the scenario the in-demand occupations vary based on the industry need. Through the forecast period the open positions and labour force fluctuate as demand and supply changes, the forecast fills the open positions based on an assumed skills profile. The following open vacancies are ones that remain at the end of the forecast period and have been identified as an ongoing gap that require additional labour supply. For this analysis,

the vacancies are assumed to be filled by the local labour force, however where gaps are pressing industry may find alternative labour sources to fill the roles.

In all three scenarios the vacancies decrease significantly in 2021 as the unemployed portion of the labour force finds new employment, then increases through the rest of the period as industry creates new demand. As the high scenario has an optimistic view of the recovery, especially for Mining, quarrying, and oil and gas extraction, the demand for labour ramps up and by 2025 the number of open positions is higher than it was at the beginning of the forecast period.

While the demand for employment varies between the three forecasts due to the differences in forecasted economic activity all three are relatively consistent in which occupations have the most vacancies for the forecast period. In 2025, all three scenarios overlap in 12 out of 15 occupations with the most vacancies. Based on the occupation profiles it appears that the industries facing the most difficulty getting sufficient labour from the currently projected local pool are Accommodations and food services, Mining, quarrying, and oil and gas extraction, and Construction. Increased engagement of the underemployed population or increased migration would allow the gaps to decrease over the forecast period.

Top 15 Occupations by Vacancies in 2025[19]

	High	Medium	Low
7371 Crane operators	211	210	208
6322 Cooks	225	199	180
7611 Construction trades helpers and labourers	213	184	157
6525 Hotel front desk clerks	171	171	172
7511 Transport truck drivers	216	168	150
6731 Light duty cleaners	167	152	148
6711 Food counter attendants, kitchen helpers and related support occupations	167	139	119
7612 Other trades helpers and labourers	125	134	144
7202 Contractors and supervisors, electrical trades and telecommunications occupations	127	127	128
6733 Janitors, caretakers and building superintendents	121	96	91
3234 Paramedical occupations	70	71	72
3012 Registered nurses and registered psychiatric nurses	50	42	39
3143 Occupational therapists*	18	20	22
7521 Heavy equipment operators (except crane)*	131	18	4
2148 Other professional engineers, n.e.c.*	15	17	20
Sub-Total	2,026	1,748	1,653
Share of Total	78%	87%	81%
Total	2,596	1998	2051

Source: Estimates prepared by Applications Management Consulting LTD.

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[19] Overall, the top 15 occupations with the largest demand growth are consistent between the three scenarios. The only exceptions are Restaurant and food service managers which is ranked 17th in the medium scenario and 44 in the low, and Food and beverage servers which is ranked 42nd in the low scenario.

6. Labour Market Strategy & Action Plan

The FMWB Labour Market Strategy & Action Plan provides strategies and actions that address objectives that emerged during the employer survey and stakeholder engagement process. The Labour Market Strategy & Action Plan is intended for use by regional stakeholders that support employers and job seekers to establish a path towards addressing labour market needs of the region.

6.1. Vision

A vision is intended to be a target for what an organization would like to achieve or accomplish. It is intended to serve as a clear guide for choosing current and future courses of action.

The vision for the FMWB Labour Market Strategy & Action Plan is as follows:

"Fort McMurray Wood Buffalo's business and economic conditions: strengthen the labour market, create accessible jobs for residents, and provide compelling reasons for new talent to choose Fort McMurray Wood Buffalo as a place to further their career. We achieve this by becoming a community with access to skills, training, and knowledge, that supports workers and professional growth."

6.2. Objectives

Objectives define the specific outcomes that would measure progress towards achieving the vision of an efficient regional labour market.

In the Labour Market Strategy & Action Plan there are 5 objectives identified. These objectives have been identified through key findings from the employer survey and stakeholder engagement process.

Labour Market Objectives
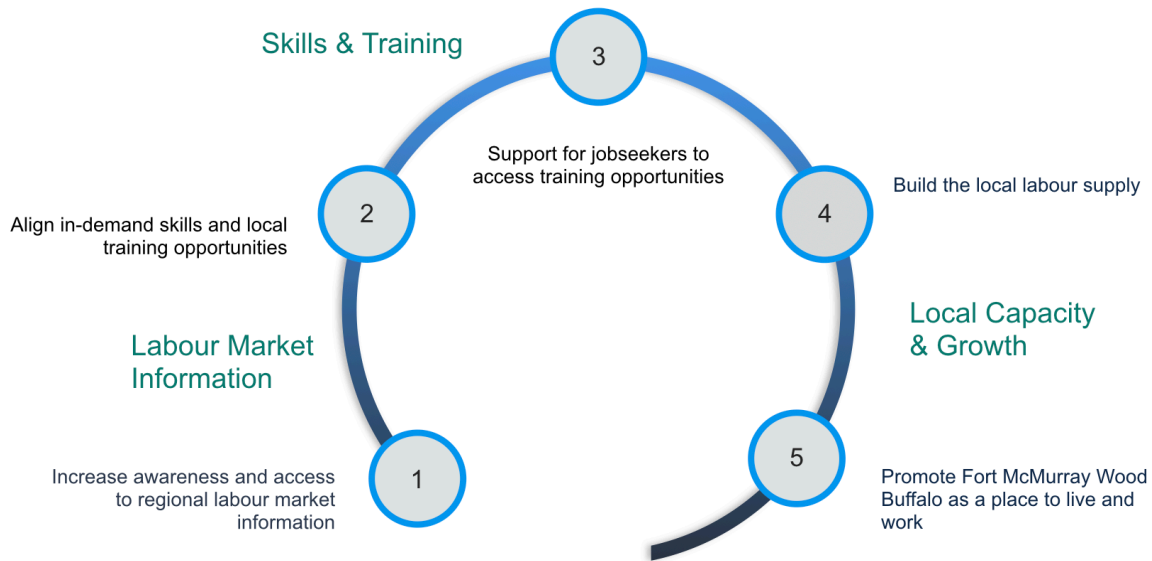
The 5 objectives are as follows:

- Objective 1: Increase awareness and access to regional labour market information.
- Objective 2: Align in demand skills and local training opportunities. .
- Objective 3: Supports for jobseekers to access training opportunities.
- Objective 4: Build the local labour supply.
- Objective 5: Promote Fort McMurray Wood Buffalo as a place to live and work.

6.3. Strategies

Strategies provide purposeful methods to address labour market gaps and opportunities, and to build on existing assets and opportunities. The strategies identified in this plan have been developed to support the 5 objectives. Each strategy has been considered to be impactful, practical, and effective.

Overall, 9 strategies have been developed in this plan. It is recommended that the following strategies be prioritized for the short-term to support the implementation of this work:

- Strategy 1: Maintain a Regional Labour Market Committee
- Strategy 2: Define shared goals among regional stakeholders

This section outlines the key strategies that have emerged and the actions that will support addressing each of the strategies. The section is organized to include the following information for each strategy:

- Strategy: This includes a description of the strategy and any context related to the need.

- Actions: Actions for implementation have been developed to provide a feasible, impactful path towards addressing strategies and objectives identified during the engagement process. Collaboration between regional stakeholders, and advocacy from the labour market committee will aide in the successful implementation of these actions to support the labour market.

- Committee Role: It is proposed that a Labour Market Committee be established to implement the FMWB Labour Market Study. The role of this committee has been defined for each strategy.

- Stakeholder Role: This plan has been developed to build on existing labour market resources and services in the Region. The actions defined in the strategy are expected to encourage participation from regional stakeholders, some of whom may be on the Labour Market Committee. Each strategy outlines the role stakeholders, whether they be committee members or other stakeholders, could take to help support implementation of the strategy.

- Monitoring Indicators: These indicators would allow the committee to evaluate the success of implementing strategies and actions, and also continue to monitor gaps and make changes to the Labour Market Strategy & Action Plan to reflect the needs of the labour market.

Labour Objectives and Strategies

Strategy	Objective 1 — Increase awareness of regional labour market information.	Objective 2 — Align in demand skills and local training opportunities.	Objective 3 — Supports for jobseekers to access training opportunities.	Objective 4 — Build the local labour supply in the Region.	Objective 5 — Promote the Region as a place to live and work.
Maintain a Regional Labour Market Committee.	●	●	●	●	●
Define shared goals among regional stakeholders	●	●	●	●	●
Maintain current, regional labour market information	●				
Promote and share Regional Labour Market Information	●				●
Align education and training with local needs		●	●	●	
Increase access to training opportunities			●	●	
Develop local capacity to fill jobs			●	●	
Increase participation of underemployed			●	●	
Attraction/retention of workers and families				●	●

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Strategy 1: Maintain a Regional Labour Market Committee.

Establish and maintain a committee to guide and advocate for the needs of regional stakeholders in support of the FMWB Labour Study. This committee will be responsible for the implementation and monitoring of the Labour Study. This oversight responsibility should not preclude members of the committee from taking on active roles in implementation of the strategies, but it is expected that the majority of this work will fall to other regional stakeholders.

This strategy supports the need for advocacy to continue with the implementation of the FMWB Labour Study.

Actions

- It is expected that the purpose of the committee will be overseeing and monitoring the vision, strategies and actions outlined in this Labour Study. Once formulated, the committee would need to revisit and revise this mission. As a starting point, it is recommended that the purpose of the committee include:
  - a) Maintain and expand the connections with regional stakeholders in support of a FMWB Labour Market Community.
  - b) Work towards implementation of the Labour Study Strategy & Action Plan
  - c) Monitor the success of the Labour Study Strategy & Action Plan
- The existing members of the project committee should identify other regional stakeholders to invite to the committee that would add value to the implementation of the plan and the Labour Market Community.
- Designate a member to act as Chairperson of the committee for the upcoming year.
- Assign committee member(s) to take a lead role in overseeing each strategy within the plan.
- Establish a frequency for committee meetings. Early in the implementation plan meetings may need to be monthly but could be quarterly later in the process.
- As a committee, develop a communications plan that could include: information sharing processes, a process and timing for providing updates on strategy implementations, branding for the FMWB Labour Market Community, and a process for developing content and approvals.
- Establish a timeline for the committee's work, perhaps a 12 month period, which will be followed by a review and a development of a plan of action for the next 12 months.

Committee Role

- Be responsible for the implementation of the Labour Study Strategy & Action Plan.

- Maintain and expand the FMWB Labour Market Community through partnerships and connecting stakeholders in the region.
- Be responsible for monitoring the success of the Labour Study Strategy & Action Plan.

Stakeholder Role

It is expected that the work of implementing the plan would largely be delegated to non-committee members. However, committee members should not be excluded from being able to actively participate in strategies and actions. It would be desirable to balance the workload of the committee with other regional stakeholders. This would also help to build on the labour market community, thus reinforcing the vision for the study.

Other stakeholders to expand the existing labour market committee could include:

- Regional education and training providers
- Employers (small/medium/large organizations)
- Organizations that serve underemployed groups

Monitoring Indicators

- Number of strategies and actions that have been implemented.
- Number of committee meetings.
- Number of organizations represented on the committee.
- The diversity of organizations on the committee to support the needs of employers and job seekers.

DRAFT for Discussion Purposes

Strategy 2: Define shared goals among regional stakeholders

Encourage opportunities for regional stakeholders to collaborate and define shared goals for the local labour market community.

This strategy addresses the changes that have occurred in the regional labour market and the desire for stakeholders to establish a common understanding and implement a path forward.

Actions

- Identify opportunities for regional stakeholders to discuss their organizations goals and how they align with regional labour market goals.
- Use the Labour Market Committee to prioritize labour market strategies.
- Discuss potential roles and responsibilities of stakeholders in the region.
- Identify opportunities for organizations with common labour market goals to work together/support each other.

Committee Role

- Find opportunities to connect regional stakeholders.
- Facilitate a session to prioritize labour market objectives and strategies.
- Continue to lead in promoting labour market information, best practices and collaboration among regional stakeholders.

Stakeholder Role

- Lead the implementation of labour market objectives and strategies.
- Facilitate employer workshops in the region.
- Continue to promote employer workshops.

Monitoring Indicators

- Prioritization and implementation of labour market strategies.
- Monitor the number of events to bring together regional stakeholders.
- Monitor the number of attendees per event from both urban and rural communities.
- Check-in on evolving labour market issues and needs that may require changes to the strategies or re-prioritization.

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Strategy 3: Maintain current, regional labour market information

Identify and maintain existing sources of labour market information, and develop new current and regional labour market information to support regional stakeholders.

This strategy supports the needs for more timely and local information regarding the local labour market.

Actions

- Identify existing source of regional labour market information. Some examples include:
    - ALIS Alberta[20]
    - Statistics Canada Labour Force Survey (LFS)
    - Alberta Regional Dashboard
- Establish a process to gather information from existing sources.
- Identify gaps in existing labour market information.
- Generate ideas for the development of new labour market information to fill gaps in existing information.

Committee Role

- Share known sources of regional labour market information.
- Gather intel from regional stakeholders on the demand for new labour market information.

Stakeholder Role

- Gather existing labour market information.
- Prepare new labour market information.

Monitoring Indicators

- Monitor sources of local labour market information.
- Monitor dissemination of local labour market information.

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[20]https://alis.alberta.ca/occinfo/occupations-in-alberta/

DRAFT for Discussion Purposes

Strategy 4: Promote and share regional labour market information

Develop opportunities to promote and disseminate labour market information throughout FMWB. This strategy is split into two phases.   Phase 1 is to enhance labour market information online presence. Phase 2 is to develop a FMWB labour market information website.

This strategy supports the need for greater awareness of existing labour market information and greater accessibility to information for regional stakeholders.

Phase 1: Develop/Enhance existing regional labour market information online and on social media to promote labour market information

Expand the online presence of labour market information in FMWB through the use of social media and existing websites. The online presence could be utilized to share regional labour market information such as promoting employers, information for job seekers and other relevant labour market information.

Actions
- Promote existing online labour market information tools (ALIS[21], existing social media accounts)
- Define the purpose and vision for social media accounts. This may include brand standards similar to the website.
- Identify appropriate new social media accounts to create specifically for labour market information (Facebook, Twitter, LinkedIn).
- Delegate a stakeholder to manage the social media accounts and post content. This could be the stakeholder(s) for the website, as this allows for cross promotion.
- Discuss opportunities to promote the social media accounts. This could include existing stakeholder websites, labour market information website, emails, community signage, and events.

Committee Role
- Share labour market information through their existing networks.
- Support the development of social media accounts. This would involve assisting with decision making related to the content for social media, and ideas to promote and support social media in the region.

Stakeholder Role
- Develop/maintain the social media accounts.

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[21] https://alis.alberta.ca/occinfo/occupations-in-alberta/

- Work with the committee to establish direction for the social media and supporting the promotion of it in the region.

Monitoring Indicators

- Monitor social media account followers.
- Monitor social media visits (impressions, tweets, likes, reposts).
- Monitor comments on social media accounts.

Phase 2: Labour market information website

Develop a FMWB labour market information website that further supports the needs of the regional labour market community. The website will provide an online platform to increase awareness on existing and new labour market information and resources specific to FMWB.

Actions

- Establish a purpose and vision for the website.
- Identify funding options for development of the website.
- Assign/hire a stakeholder(s) to be responsible for hosting/developing/updating the website.
- Establish brand policies for the website.
- Discuss content ideas for the website.
- Design a website sitemap.
- Develop the content for the website, including existing labour market information resources in the region.
- Establish a frequency for updating the website.
- Promote the website to the FMWB labour market community (stakeholder websites, community signage, stakeholder newsletters, emails to stakeholders, existing social media).

Committee Role

- Support the development of the website. This would involve making decisions related to the funding for the website, generating content ideas for the website, and ideas to promote and support the website.

Stakeholder Role

- Primary role of developing and maintaining a labour market information website.
- Work with the committee in establishing direction for the website and supporting the promotion of the website in the region.

Monitoring Indicators

- Monitor website traffic statistics.
- Monitor website downloads of resources.

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Strategy 5: Align education and training with local needs

Develop opportunities for regional stakeholders to engage on topics related to employer skill requirements and local education and training opportunities.

This strategy supports the need for on-going review of local training opportunities to better support the regional demand for workers.

Actions

- Connect regional employers with local education and training providers.
  - Hosting annual workshops to discuss skill requirements and gaps.
- Promote training programs that support employer upcoming skill requirements.
- Identify opportunities to provide/expand local training for in-demand/emerging occupations (childcare Level 2&3 certification, gas fitting, small equipment operation, inspectors, class 1&3 drivers, culinary program, IT, water/wastewater operator, non-destructive testing, technology related occupations to support energy sector such as data scientists, data architects).
- Awareness of Work Integrated Learning[22] to connect post-secondary students with short-term/virtual/hands on work experience that is integrated with their studies.
- Promote professional development opportunities with employers and employees to continue to build the local skillset.

Committee Role

- The committee can create opportunities to connect local education and training providers with regional employers.
- The committee can help stakeholders advocate for local training programs that meet employer needs.
- The committee can help to promote local training opportunities.
- The committee can help to promote employer skill requirements.

Stakeholder Role

- Advocate for funding to establish and maintain relevant training programs in FMWB.
- Develop training programs that meet local employer needs.
- Monitor training programs for those with low enrolment/waitlists.
- Promote local training programs.

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[22] Employment Social Development Canada: The Innovative Work-Integrated Learning Initiative

- Support new and emerging programs and training opportunities to support local employer needs.

Monitoring Indicators

- Monitor program enrolment levels.

- Monitor number of new local programs.

- Monitor job vacancies by occupation.

- Monitor number of promotions of local training opportunities through the labour market information website and social media.

DRAFT for Discussion Purposes

Strategy 6: Increase access to training opportunities

Encourage opportunities for job seekers to access local on the job and education training programs.

This strategy supports the need to encourage increased training opportunities for local job seekers to support the skill development of the local labour force.

Actions

- Educate employers on the benefits of mentorship, apprenticeship, work experience and workplace programs.
- Maintain a resource listing of current programs and supports that provide financial aid.
- Increase awareness of programs and supports to provide financial aid for training employees.
- Maintain a resource listing of local training providers and programs.
- Reduce barriers for job seekers to access training.
  - Limit financial barriers through the use of financial aid programs and supports.
  - Encourage employers to provide opportunities to students and those with limited experience.
  - Provide in-person and virtual training options that can support the region's population.
- Post pandemic outreach to regional training providers/employers to identify opportunities to re-engage students, youth for training programs , internships and mentorship opportunities.
- Identify opportunities to encourage post high school completion job training.

Committee Role

- Identify opportunities to educate employers on the benefits of mentorships, apprenticeship, work experience and workplace programs.
- Promote training programs and financial aid training programs through existing networks and online presence.
- Utilize the committee and their networks to identify regional employers/employees that have had success in workplace program and practices such as: mentorship programs, apprenticeships, work experience, summer job programs, job training programs, and scholarship/bursary opportunities.

Stakeholder Role

- Education and training providers share information on programs.
- Regional employers are encouraged to find opportunities to support training local labour.
- Regional employers connect with high school/post-secondary students for training/job opportunities.

Monitoring Indicators

- Monitor enrolment by regional employers in Government of Alberta financial aid training programs.
- Monitor local post-graduation employment rates.
- Monitor regional high school completion rates.

DRAFT for Discussion Purposes

Strategy 7: Develop local capacity to fill jobs

Foster and encourage opportunities to support the development of the local labour force in FMWB.

This strategy supports the need to develop the skills of the local labour force. This will help to encourage local hiring and higher rates of employment among underemployed groups.

Actions

- Encourage completion of high school and post-secondary education through access to post graduation training and job opportunities.
- Promote local in-demand occupations that have local job prospects.
- Increase online promotion of local job opportunities and training opportunities for job seekers.
- Develop a Hire Local Campaign.
- Promote professional development opportunities for local employers to build career paths for current employees.

Committee Role

- Identify opportunities to connect regional employers with local job seekers.
- Promote local job opportunities through existing networks and online presence.
- Identify opportunities to reduce barriers for employers to hire locally.

Stakeholder Role

- Encourage local hiring.
- Encourage local training opportunities for students.
- Employers collaborate with local training providers to fill employment gaps.
- Develop career paths for new and current employees.

Monitoring Indicators

- Monitor local unemployment rates.
- Monitor local high school completion rates.
- Monitor program enrolment and graduation rates through training providers.

DRAFT for Discussion Purposes

Strategy 8: Increase labour force participation of underemployed groups

Foster and encourage opportunities to increase the participation of underemployed groups. The underemployed groups include:

- Indigenous
- Mature Workers
- Newcomers
- Persons with disabilities
- Rural population
- Women
- Youth

This strategy supports the need to develop the skills among the underemployed groups and encourage higher rates of labour force participation.

Actions

- Promote pre-employment training opportunities for job seekers.
    - Essential life skills
    - Resume building, interview skills
    - Employer expectations/On the job expectations
    - On-site drug and alcohol policies
- Find opportunities for employers to hire directly from underemployed groups. For example:
    - Connect with labour in rural communities (reduce barriers related to transportation and scheduling).
    - Connect with Indigenous labour pools through organizations such as NAABA and ATC.
    - Work with Women Building Futures to connect women with local job opportunities.
    - Connect with other local organizations that support underemployed groups to understand barriers to employment, needs and skillsets.
- Promote regional success stories of employing a diverse workforce.
- Promote diversity inclusion training and awareness within organizations.
- Discussion of supports to rural employers that must offer housing to attract workers.
- Discussion of potential transportation from selected rural communities to Fort McMurray to encourage employment.

- Support development of childcare spaces to increase female labour force participation in rural communities.

Committee Role
- Promotion of local labour pools among regional employers.
- Promote local training programs to get workers job ready.
- Promote the regional success stories of employing a diverse workforce.
- Connect employers with underemployed groups.

Stakeholder Role
- Increase awareness of diversity inclusion within organizations.
- Connect with local underemployed groups to identify and help mitigate barriers to employment.
- Access financial aid to employ and provide training opportunities to underemployed groups.
- Share success stores of hiring underemployed groups and the value it brings to their organizations.

Monitoring Indicators
- Monitor unemployment rates for underemployed groups.
- Touch-point with organizations that support underemployed groups to identify barriers and needs.

DRAFT for Discussion Purposes

Strategy 9: Attraction and retention of workers and families

Continue to promote FMWB as a place to live and work.

This strategy supports the on-going need to attract and retain skilled workers to support the employment demands in the region. Having a diverse local workforce is key to supporting the range of job opportunities in both the energy and non-energy sector.

Actions

- Share the FMWB Community Toolkit[23] as a way to promote living and working in the region. This can be shared with regional stakeholders to integrate into their attraction and retention strategies.
- Share information with regional employers about the benefits of hiring locally. This includes best practices from employers and employee experiences.
- Attraction strategy for in-demand occupations such as within trades, construction management occupations, Class 1& 3 drivers and child-care workers.
- Attraction of families to enable spouses/children to work in support industries in the region.
- Awareness of adjusted employer retention strategies including: work from home options, wellness days off, employee check-ins, virtual luncheons.
- Promote employee referral programs.
- Information and support for newcomers and those looking to move to the region. (ie. experiences from people who moved to the region).
- Encourage rural employers to provide food/housing to attract workers.
- Encourage workplace social events to reduce isolation among workers.
- Discussion with levels of government to provide cost of living program to support critical occupations in region (ie. childcare workers) that have been impacted by loss of Northern Living Allowance.

Committee Role

- Use existing networks and online presence to promote FMWB as a place to live and work.
- Continue to identify barriers/opportunities to attracting people to live and work in the region.

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[23] Available through Fort McMurray Wood Buffalo Economic Development & Tourism.

Stakeholder Role

- Develop content to promote the region as a place to live and work (experiences of people who have moved to the region/employers who have hired locally).

- Employers can promote employee referral programs to attract workers and families to the FMWB.

- Promote career paths that showcase opportunities for advancement.

Monitoring Indicators

- Monitor the demographic profile of the region (gender, age, household composition).

- Monitor recruitment and retention challenges of regional employers.

7. Moving Forward

The FMWB Labour Study is intended to be a living document that can support the regional labour market community over the coming years. The labour market issues and challenges identified during this process reflect the concerns at this time, it is the intention that these may evolve over time and strategies and priorities may shift.

Regional stakeholders expressed a common vision to advance labour market information to continue to build the local labour force and create opportunities for people to live and work in the region.

In establishing the priorities and strategies from this study, there should be a clear understanding of the roles and responsibilities of various stakeholders. To gain a greater understanding of the potential roles and responsibility of local and regional organizations in supporting these strategies, the following can be explored:

- Which organizations have a mandate that supports the priority?
- Who has the capacity to take a leadership role?
- Are there opportunities for partnerships?
- Which organizations should be involved?

It is also not possible to address every priority at one time. It is recommended that there is a process to prioritize the strategies:

- Are there any immediate issues that need to be addressed?
- Are there any quick wins?
- Which issues will require the greatest amount of time and resources?

Moving ahead, it is intended that this document has been developed to provide the FMWB with a feasible, impactful path toward addressing some of the key labour market priorities and issues identified during the engagement process. Regional stakeholders can take the Labour Market Strategy & Action Plan and move it forward locally and regionally. Cross-sectional planning, collaboration between regional employers, programs and service providers, community organizations and the business community, and advocacy from local groups will aid in developing and implementing strategies to strengthen the regional labour market.

Appendix A: Survey Methodology

The purpose of the FMWB Employer Survey was to gain a better understanding of issues and opportunities facing the regional labour market from the perspective of employers. The survey gathered relevant, timely regional labour market information from various organizations in the FMWB regarding their employment practices. It is critical to gain insight from the employer perspective about worker needs and shortages in order to ensure that the Labour Market Study addresses the specific challenges organizations are currently facing within the Region.

Survey Methodology

The survey was designed to provide a more in depth picture of the regional labour market. The development of the survey questionnaire was informed by the background research, key informant interviews and steering committee members. The Steering Committee worked collaboratively to review and refine the survey questionnaire to ensure the questions aligned with the overall project purpose.

The employer survey was conducted in November 2020 to March 2021 to collect information from organizations that have workers in the FMWB. All employers were contacted by telephone to solicit their participation. The majority of employers chose to complete the survey online, with a small number of employers opting to complete the survey over the telephone.

Employers were selected to participate at random from a master contact list of organizations. Consideration was also given to the industry, municipality and firm size of the employers, to ensure a representative sample of organizations in the FMWB were contacted. This contact list was comprised of various contact lists obtained from the Steering Committee, Business License listing, and NAABA listing, The master contact list was then supplemented by online searching of organizations in the Region where required.

Employers were asked questions specific to their organization's operations and employment in the FMWB. Consequently, to qualify to participate in the survey, employers must have employed at least one paid worker in the FMWB at the time of their survey. Employers were asked to identify the industry or industries their organization belongs to, the locations their organization operates in the Region by municipality, and the number of people their organization employs in the Region by municipality. Employers were then asked questions about starting and upper end wage rates of top occupations, future business activity, current hiring, plans to hire, recruitment practices, voluntary turnover, retention practices, future recruitment of underemployed groups, current worker programs, accommodations and supports, and applications for workplace resources.

Survey Response Rate

When contacting employers in the FMWB, surveyors found that for the most part respondents were interested in participating. Overall, the response rate for completed surveys was 44%. Of the 656 organizations contacted, 245 respondents completed the survey.

Limitations of the Survey

When reviewing the survey results, there are some limitations that should be considered. The survey represents the views of employers. No attempt was made to contact employees and as a result their perspectives are not captured by the survey. The survey results are based on a sample of employers, therefore the results do not necessarily reflect all employers in the FMWB.

Appendix B: Forecast Methodology

An analysis of the growth potential for FMWB has been conducted using Applications Management Consulting LTD's Employment Demand Forecasting Model. This model projects economic growth by industry on a regional basis. It also estimates employment growth by industry and occupation. The employment gaps are based on the Applications Management Consulting LTD supply model which calibrates the increased demand for employment with the forecasted labour force.

Analytical Framework

The forecasts of growth for FMWB are based on a projection of economic activity and employment by industry group. The key assumptions used in these forecasts are provided below.

Employment Growth Forecasts

Employment growth in FMWB has been estimated based on an analysis of the economic factors that will propel growth over the forecast period. This includes consideration of 'driver' industries that are expected to lead growth. It also includes growth in 'support' industries that provide goods and services to local population and businesses.

Driver Sectors

Economic growth in FMWB has been estimated based on a determination of major sectors that will drive growth within the region. Growth in these sectors industries has been determined to have an effect on the net migration of workers and their families to the region. The driver sectors that have been identified are the Mining, quarrying, and oil and gas extraction and Tourism sectors.

◆ The Mining, quarrying, and oil and gas extraction industry is an important part of the FMWB economic ecosystem. In 2020 Oil and gas directly accounted for 47% of the total employment in FMWB, and further supports employment in other sectors due to the spill-over effects. The Oil and gas sector has been faced with change over the last few years which unlikely to end during the forecast period. The sector faces new competition on the international market, and due to increasing demand for alternative energy sources. FMWB is poised to continue leading the industry in Canada due to the economic viability of the Oil Sands but will likely feel the impact of the changing market. The Oil and gas scenario forecast is based on publicly reported data for planned projects in the region, with varied assumptions on the projects that begin construction and/or come on-line during the forecast period.

 ◆ The high scenario assumes that there are no further delays for projects that have been announced to either begin or end construction during the forecast period.

- The medium scenario assumes that there are some addition delays. This pushes some projects to a later start in the forecast period and others to not start during the forecast period.

- The low scenario assumes no additional projects will begin during forecast period except for those confirmed during the consultation.

- Tourism was identified as one the core pillars in the 2019 FMWB Economic Development Annual Report. Additionally, it was one of the hardest high sectors during the Covid-19 pandemic and is expected to recover driving high industry growth through the forecast period. The industries that belong to the Tourism sector also overlap with the Oil and gas sector and changes in the growth of the Oil and gas sector will impact the Tourism industry forecasts. The forecast for the Tourism sector assumes recovery for the included industries with adjustments based on the historic growth of each. The three scenarios incorporate different levels of growth over the forecast period.

Support Sectors

The remaining sectors are modelled as support sectors. This falls into two different subcategories. The first is community support sectors that grow with the population to provide local services to the region. Examples of the community support sectors include Educational services, Health care and social services, and Retail Trade. The second is industry supporting sectors, these are sectors that do not drive the regional economic climate on their own but instead provide goods and services to other industries within the region. Examples of the industry support sectors include Construction, Manufacturing, and Professional, scientific and technical services.

Labour Force Participation

Labour force participation is used in the analysis to estimate the proportion of each age group in FMWB's propensity to actively engage in employment, or employment seeking. The labour force is composed of anyone over the age of 15 who is active in the labour market either actively employed or unemployed. The overall participation rate for FMWB is 75% for the population over the age of 15. The participation rate for those between 25-64, which makes up the majority of the work force, was 81%.

Regional Economic Outlook

It is assumed that FMWB's growth outlook performance is highly correlated with, and dependent upon factors that are often external to the municipality itself, most specifically changes in the energy sector. The three scenarios incorporate different outlooks for the energy sector to account for the variability.

Population Forecast Assumptions

A number of assumptions related to FMWB's population and economic conditions are necessary to perform the analysis described in this report. The population forecast informs the demand for community support sectors, and the supply of available workers during the forecast period. These assumptions are described below.

Base Year Data

The 2016 Federal Census and the 2018 RMWB Municipal Census have been used as the starting point for the analysis. Employment is based on the federal and RMWB Municipal Census data and updated based on the FMWB Employer survey and industry specific changes for the FMWB-Cold Lake economic region as reported in Statistics Canada Table 14-10-0092-01. Local population estimates were from Statistics Canada Population estimates, July 1, by census metropolitan area and census agglomeration, 2016 boundaries.

Fertility

Fertility rates represent the estimated likelihood of a birth per female in a particular age group. The age-specific fertility rates used in this forecast were calculated based on the ten-year averages (2011 to 2020) of those reported in the Alberta health Region North Zone.

Mortality

Mortality rates represent the estimated likelihood of death in a particular demographic group. The age- and gender-specific mortality rates used in this forecast were calculated based on the ten-year averages (2011 to 2020) of those reported in the FMWB Census Agglomeration.

Migration

In this analysis, migration is primarily assumed to occur based on projected levels of job availability and general economic conditions in FMWB. Job vacancies that remain unfilled by the local labour force attract employment-based migrants, who are also expected to bring their families with them. Due to the unique nature of 2020 the forecasts all assume that there is no additional migration in 2021, this ensures that the forecast recalibrate the labour market after the high unemployment in 2020.

Appendix C: Community Profile

The community profiles are derived using the 2016 Federal Census labour force profile for each community. Labour force data by industry is used to ensure the employment changes reflect the strengths of each community. As the data is derived from the census some communities may be under-estimated due to data suppression in the base data.

2020 Community Profile

	Employment	Labour Force	Unemployment Rate
USA	39,201	43,433	10%
Anzac	228	251	9%
Conklin	42	46	9%
Draper	-	-	-
Fort Chipewyan	324	375	14%
Fort Fitzgerald	-	-	-
Fort McKay	-	-	-
Gregoire Lake Estates	159	172	8%
Janvier	47	53	11%
Saprae Creek Estates	358	396	10%
Allison Bay 219	40	43	7%
Chipewyan 201A	7	7	0%
Dog Head 218	12	13	8%
Fort Mackay	323	360	10%
Gregoire Lake 176	63	83	24%
Gregoire Lake 176A	24	32	25%
Janvier 194	124	144	14%
Old Fort 217	-	-	-
Thabacha Náre 196A	-	-	-
Total	40,952	45,408	10%

2025 Community Profile - Low Scenario

	Employment	Labour Force	Unemployment Rate
USA	41,292	44,237	7%
Anzac	239	250	4%
Conklin	45	49	8%
Draper	-	-	-
Fort Chipewyan	346	397	13%
Fort Fitzgerald	-	-	-
Fort McKay	-	-	-
Gregoire Lake Estates	163	169	4%
Janvier	51	56	9%
Saprae Creek Estates	377	400	6%
Allison Bay 219	41	45	9%
Chipewyan 201A	8	8	0%
Dog Head 218	12	14	14%
Fort Mackay	332	354	6%
Gregoire Lake 176	67	85	21%
Gregoire Lake 176A	25	33	24%
Janvier 194	131	152	14%
Old Fort 217	-	-	-
Thabacha Náre 196A	-	-	-
Total	43,131	46,246	7%

2025 Community Profile - Medium Scenario

	Employment	Labour Force	Unemployment Rate
USA	43,157	46,000	6%
Anzac	249	257	3%
Conklin	46	51	10%
Draper	-	-	-
Fort Chipewyan	356	407	13%
Fort Fitzgerald	-	-	-
Fort McKay	-	-	-
Gregoire Lake Estates	165	169	2%
Janvier	52	57	9%
Saprae Creek Estates	394	415	5%
Allison Bay 219	42	46	9%
Chipewyan 201A	8	8	0%
Dog Head 218	13	14	7%
Fort Mackay	336	355	5%
Gregoire Lake 176	69	88	22%
Gregoire Lake 176A	27	35	23%
Janvier 194	137	158	13%
Old Fort 217	-	-	-
Thabacha Náre 196A	-	-	-
Total	45,052	48,061	6%

2025 Community Profile - High Scenario

	Employment	Labour Force	Unemployment Rate
USA	45,357	48,038	6%
Anzac	262	270	3%
Conklin	48	53	9%
Draper	-	-	-
Fort Chipewyan	368	418	12%
Fort Fitzgerald	-	-	-
Fort McKay	-	-	-
Gregoire Lake Estates	167	170	2%
Janvier	53	58	9%
Saprae Creek Estates	415	436	5%
Allison Bay 219	43	46	7%
Chipewyan 201A	8	8	0%
Dog Head 218	13	14	7%
Fort Mackay	341	360	5%
Gregoire Lake 176	72	90	20%
Gregoire Lake 176A	29	37	22%
Janvier 194	145	166	13%
Old Fort 217	-	-	-
Thabacha Náre 196A	-	-	-
Total	47,321	50,164	6%