

Automotive Labour Market Project Eastern Ontario Economic Region Initial Consultation

July 2019

CSTEC

Canadian Skills Training and Employment Coalition



Automotive Labour Market Project:

Three-year project funded by the Government of Canada to provide the broader automotive sector, educators, policy makers, job seekers and other stakeholders with current labour market information related to the sector including the examination of trends and the forecasting of supply and demand for key occupations.

The project will produce profiles, research findings and forecasts in order to help:

1. Industry make more informed decisions related to workforce planning and skills development;
2. Job seekers, students and young people have a better sense of where employment opportunities will be in the sector;
3. Educators and policy makers better understand the sector's employment trends.

Project Partners

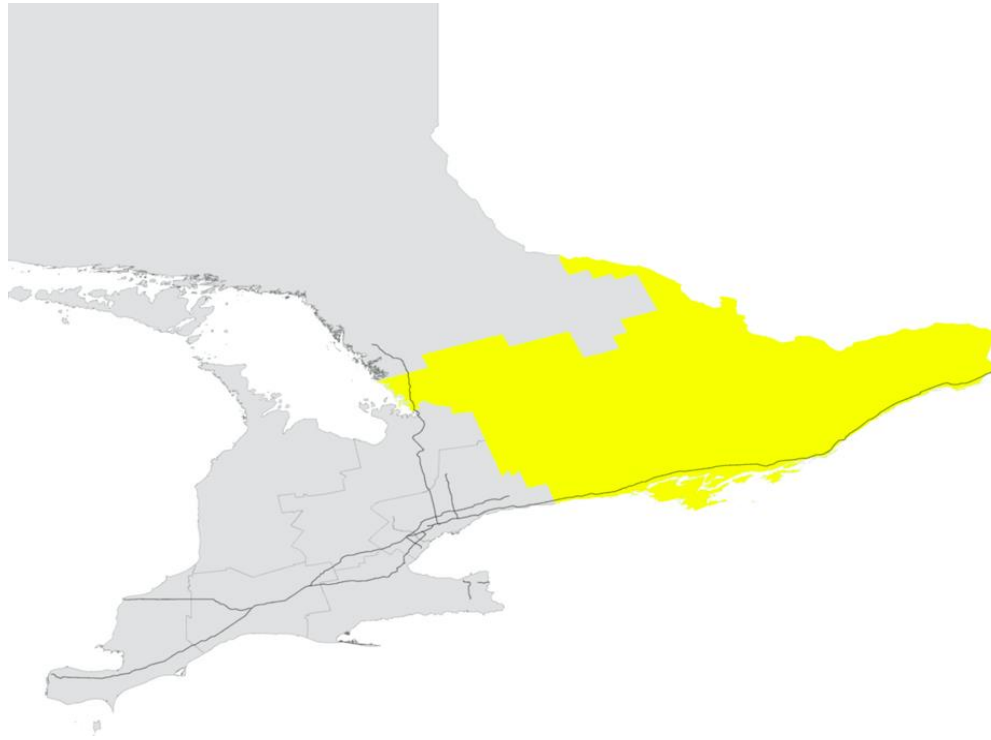
CSTEC: The Canadian Skills Training and Employment Coalition is an enabler of innovative, multi-stakeholder solutions to training related problems faced by employers within the broader manufacturing sector. We focus on a broad range of training issues related to workplace training, apprenticeship, labour market information, adjustment and career enhancement. <https://cstec.ca>

APRC: The Automotive Policy Research Centre (APRC) is non-profit organization that conducts research and disseminates knowledge about how public policy supports Canada's globally competitive automotive industry in an increasingly challenging global environment. <https://automotivepolicy.ca/>

Prism Economics: For two decades, Prism has extended a variety of analytical and management-related services to clients in government, non-profit, post secondary, and labour sectors. Prism's in-depth knowledge of labour market structures, issues, sources, people, institutions, regulations, and policies leads to credible and practical research. <https://www.prismeconomics.com/>

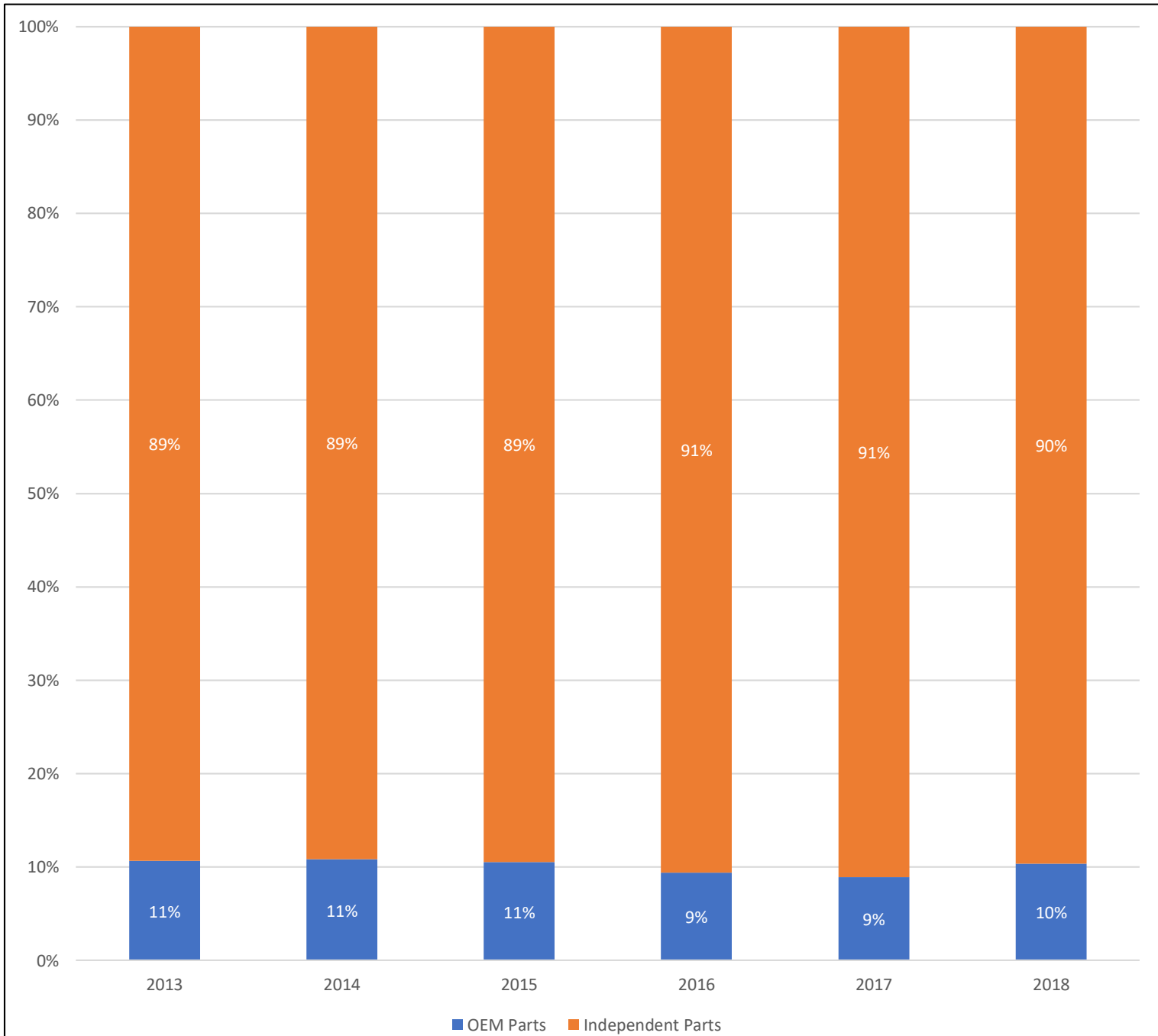


Eastern Ontario
Automotive
Manufacturing
Region

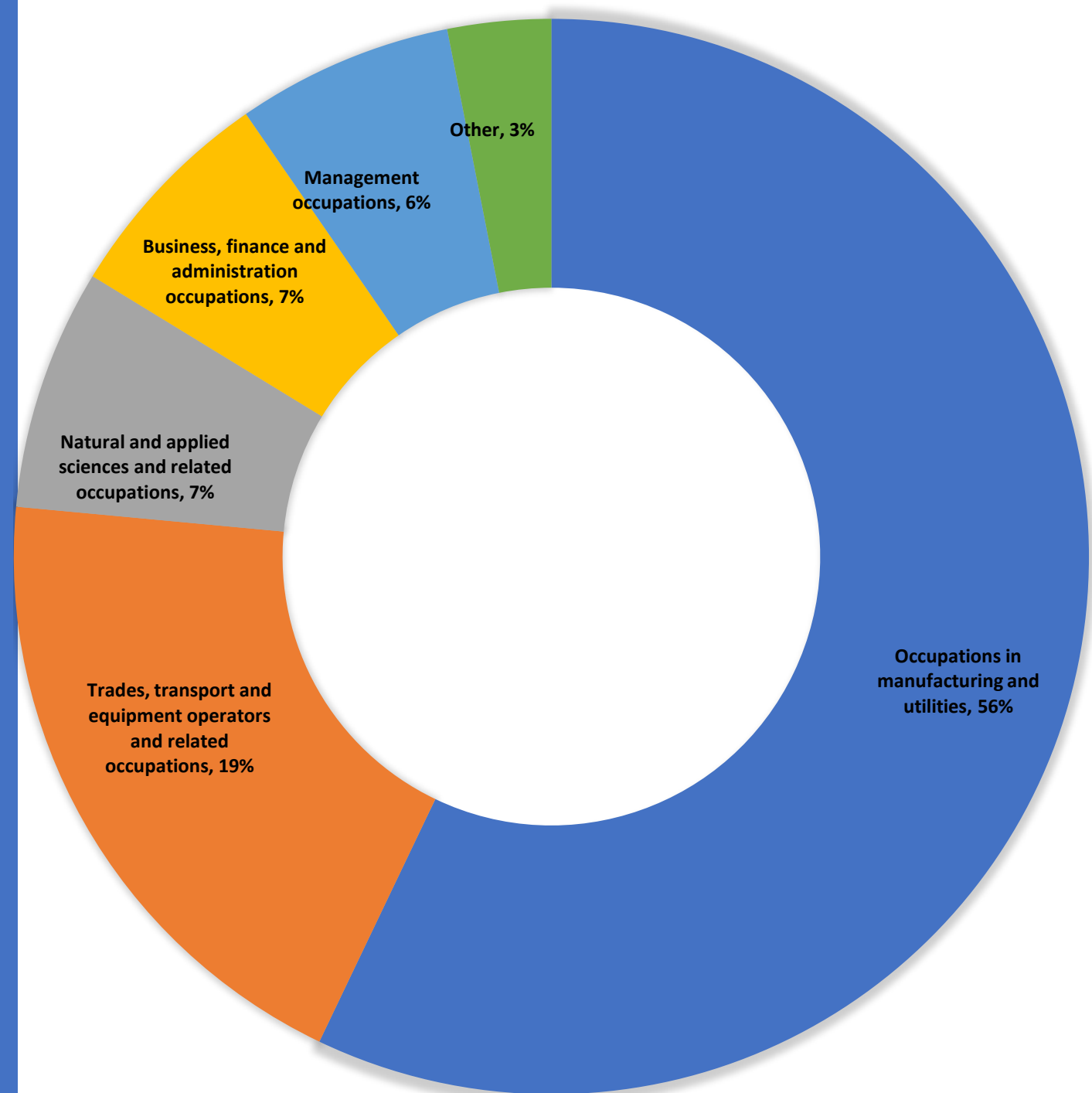


- The Eastern Ontario region is comprised of the Economics Regions (ERs) of Ottawa, Kingston-Pembroke, and Muskoka-Kawarthas.
- Eastern Ontario region's automotive industry employed an estimated 4,000 workers across 19 businesses in 2018.
- The region is home to a total of 18 parts suppliers employing nearly 3,600 workers and a OEM supplier employing nearly 400 workers.

Automotive Manufacturing Employment by Activity in Eastern Ontario, 2018



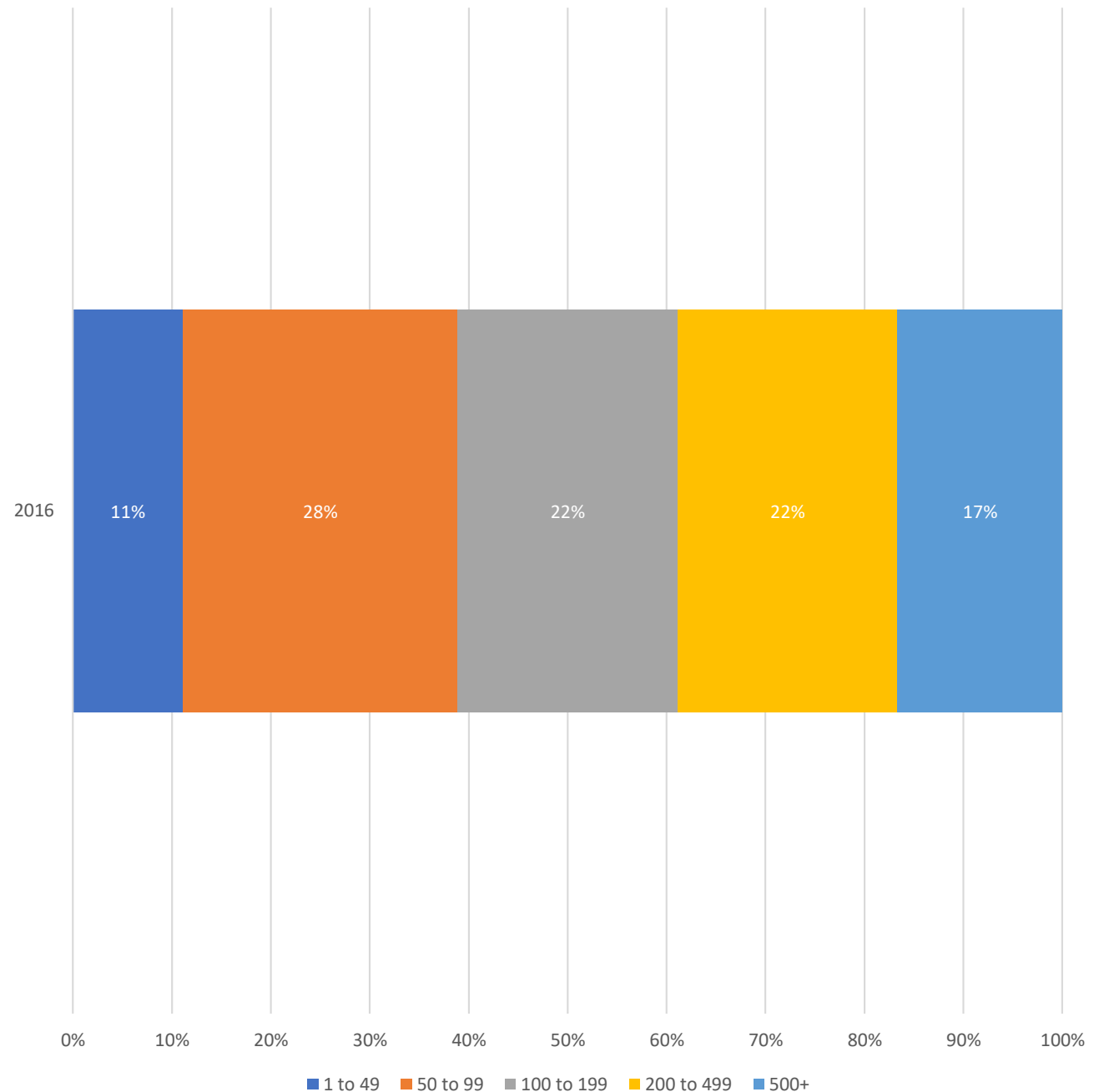
Automotive Manufacturing Workforce by Occupation in Eastern Ontario 2016



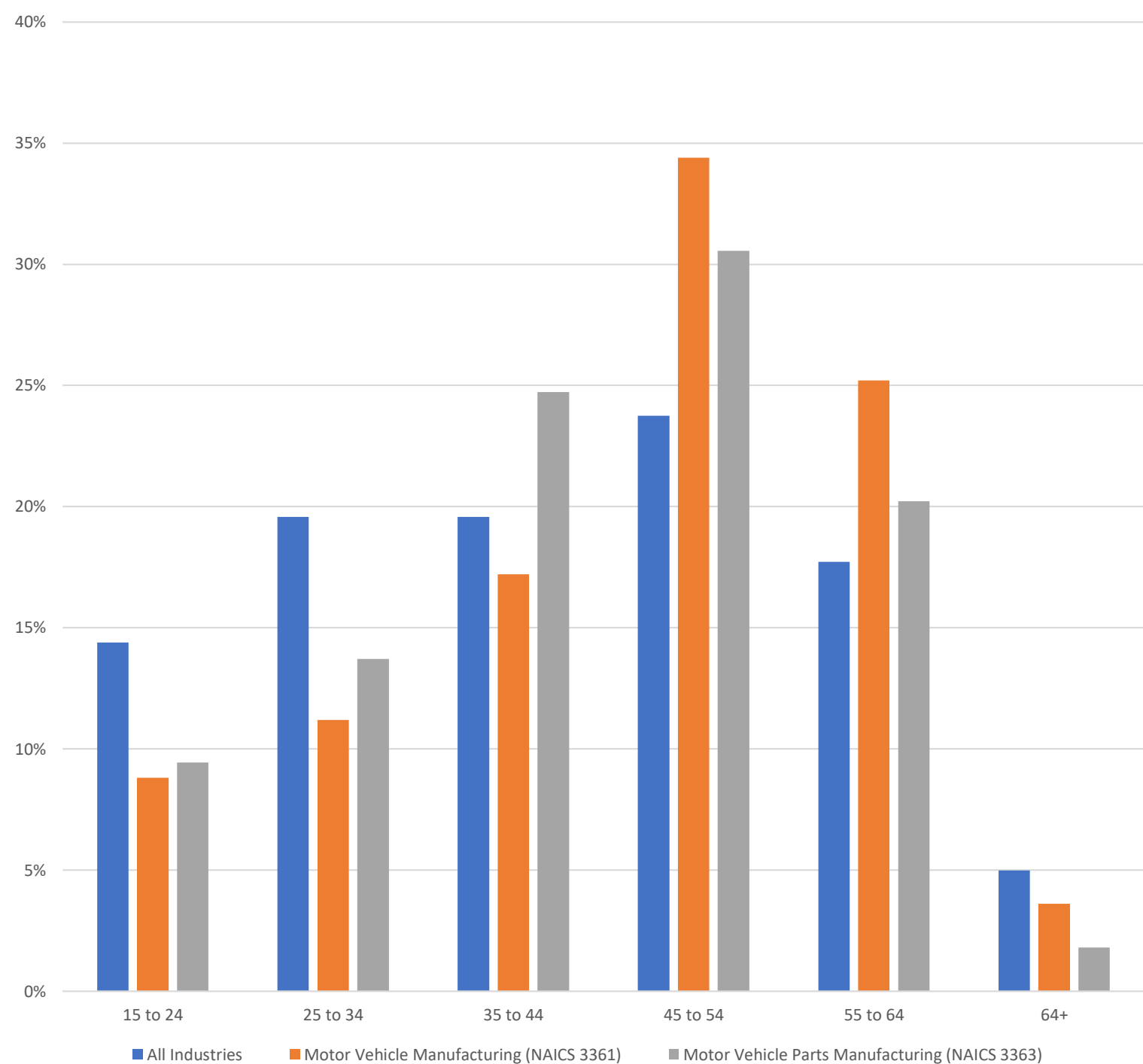
Key Regional Automotive Manufacturing Occupations and Trades. 2016

Occupation	Automotive Manufacturing Labour Force	Share of Automotive Manufacturing Labour Force
Motor vehicle assemblers, inspectors and testers (NOC 9522)	1450	42.3%
Material handlers (7452)	185	5.4%
Supervisors, motor vehicle assembling (9221)	120	3.5%
Manufacturing managers (0911)	110	3.2%
Other labourers in processing, manufacturing, and utilities (9619)	110	3.2%
Construction millwrights and industrial mechanics (7311)	100	2.9%
Automotive technicians, truck and bus mechanics and mechanical repairers (7321)	100	2.9%
Welders and related machine operators (7237)	65	1.9%
Industrial electricians (7242)	50	1.5%
Metalworking and forging machine operators (9416)	45	1.3%
Mechanical engineers (2132)	40	1.2%
Industrial painters, coaters, and metal finishing process operators (9536)	35	1.0%
Tool and die makers (7232)	30	0.9%
Shippers and receivers (1521)	30	0.9%
Industrial and manufacturing engineers (2141)	25	0.7%
Mechanical assemblers and inspectors (9526)	10	0.3%

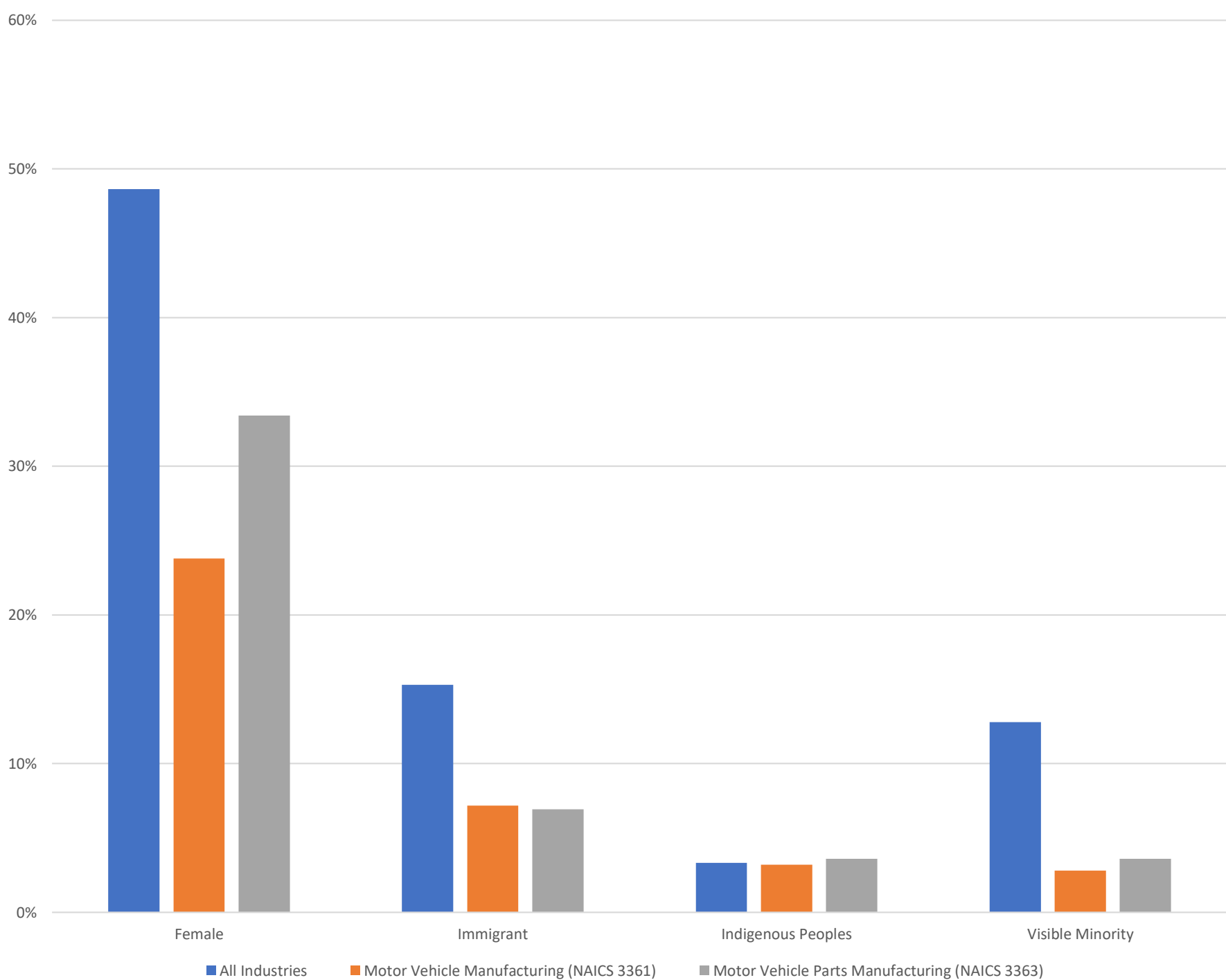
Vehicle Assembly and Automotive Parts Manufacturing Establishments by Size in Eastern Ontario



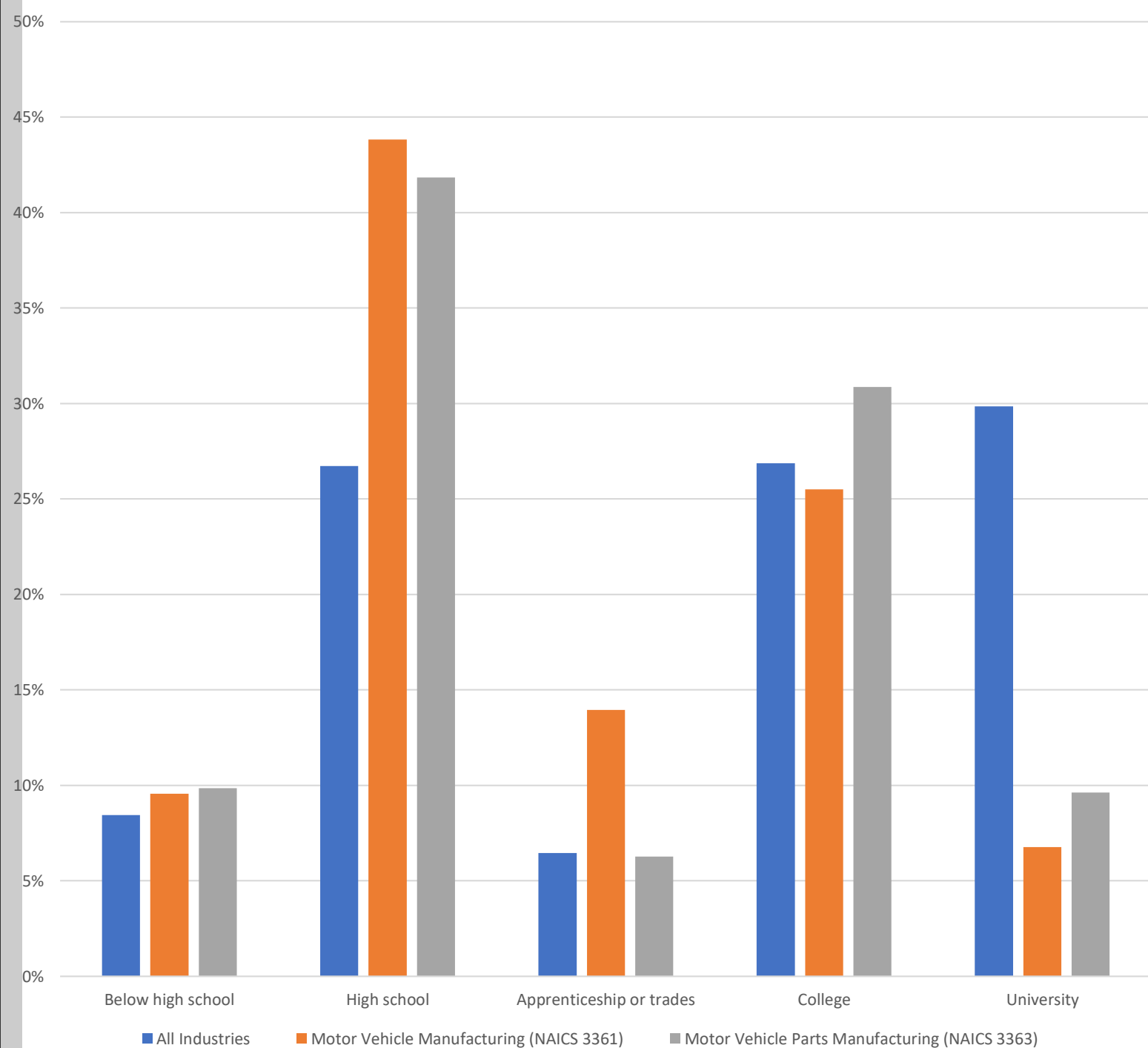
Age Composition of Automotive Manufacturing Workforce in Eastern Ontario 2016



Diversity of Automotive Manufacturing Workforce in Eastern Ontario



Highest Educational Attainment of Automotive Manufacturing Workforce in Eastern Ontario



Auto LMI Project Objectives

A comprehensive labour market analysis of the Canadian automotive industry and its supply chain for the purpose of:



Documenting the importance and size of Canada's automotive sector and helping job seekers and students understand the type of employment opportunities available.



Provide rigorous, forward-looking labour data to employers to support informed strategic decisions around recruitment and retention



Support informed discussions between the industry, government and policy-makers

A Different Approach to LMI:

Takes a broad definition of the automotive industry that includes vehicle assemblers, automotive parts and components manufacturers, materials suppliers, companies supplying tooling and production technology (including dies and molds), and connected and autonomous vehicle technology suppliers. Broader definition raises number of individuals working in automotive sector to the 176,000 to 188,000 range or more.

Forecasts will be variable, with multiple demand side scenarios based on assumptions about economic growth rates, sectoral investment levels and productivity enhancements.

Robust input and consultations with employers and industry associations on important labour market issues, recruitment and retention issues and other important industry trends.

Key Outputs



AUTOMOTIVE
LABOUR MARKET
FORECASTING
MODEL



PROVINCIAL
FORECASTS FOR
ONTARIO AND
QUÉBEC



DETAILED FORECASTS
FOR WINDSOR-SARNIA,
LONDON/STRATFORD-
BRUCE, KITCHENER-
WATERLOO-BARRIE, THE
GOLDEN HORSESHOE,
EASTERN ONTARIO,
MONTRÉAL, WINNIPEG,
AND VANCOUVER

Additional Outputs

Forecast supply and demand for approximately 48 important automotive sector occupations, including engineers, technicians, and skilled trades such as millwrights, electricians, and tool and die makers.

A sectoral wage overview based on StatsCan's various reports and data collected from collective agreements and electronic job postings.

Eight or more trend reports on important topics including industry wages, diversity and demographics of workforce, emergent technology, labour mobility, supply trends, work-integrated learning, etc.

Final report with recommendations from employers on how to solve labour market challenges in the automotive sector.

The Automotive Trend Reports

To be Produced in 2019

Labour market mobility

How industry and other stakeholders define competitiveness

Rationale for defining automotive sector more broadly

Catalogue of training programs relevant to industry

Possible Future Reports

Key labour market challenges and industry led solutions

Review of technological trends and impact on workforce

Apprenticeship and work integrated learning

Examination of diversity in automotive workforce

Other topics as suggested by industry

Questions and Discussion

Recruitment and Hiring

Are you experiencing any recruitment and hiring challenges?

How serious are the challenges and why do they exist?

Skills and Occupations

Do you think there are shortages of workers in your region?

If so, for what occupations is there a shortage?

Workforce Demographics

Are you concerned about the age of your workforce?

Women currently only comprise 33% of the sector's workforce. Do you have a program or approach to encourage the hiring of women or other underrepresented groups?

Competition

Do you compete with any other companies/industries/regions for workers?

What industries seem to be getting the best talent?

Technology

Have you made any major upgrades in new production technologies?

Are there any skills or training challenges related to the adoption of new technology?

Education and Training

Are you partnering with any colleges/universities/high schools/trade schools?

How beneficial are these partnerships?
Could they be improved?

Infrastructure

Are there any infrastructure advantages and/or challenges in your plant/region?

Electricity, traffic/mobility, communications, etc.

Policy Supports and Government Programs

Are there any Federal or Provincial programs that you use to help you train, recruit, and modernize production?

Are there any new programs or improvements to existing programs that would help you recruit and retain people with the right skills?

Is there a government funded program or policy we should examine?

Thank You

Contact: general@cstec.ca

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