Southwest Alberta Regional Skills Study
Regional Report: City of Lethbridge

September 2020

Economic Development Lethbridge

MDB INSIGHT

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Glossary of Terms

AI: Artificial Intelligence

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

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

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

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

ESDC: Employment and Skills Development Canada

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

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

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

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

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

SME: Small and Medium-Sized Enterprises

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

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

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

Workforce/Labour Force: People engaged in or available for work in the Study Area

Preamble

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

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

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

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

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

Methodology – Phased Approach

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

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

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

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

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

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

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

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

About the Data

Where does the data presented in this report come from?

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

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

About the Canadian Business Counts

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

This section includes all registered companies that have a Goods and Services Tax number, as registered through the Canada Revenue Agency. Results should not be compared directly to existing business directories in Ajax as the criteria for registering are different for both. The Canadian Business Counts data are used primarily so that comparisons can be made to the Provincial Distribution of businesses across the same categories. In some cases, companies are registered in a community but operate in another community in the proximity.

About the Employment Projections

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

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

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

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

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

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

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

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

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

Skill level A

- University degree (bachelors, masters or doctorate)

Skill Level B

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

Skill level C

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

Skill level D

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

1. Executive Summary - City of Lethbridge Skills Profile

The City of Lethbridge is the largest and fastest-growing centre in the Study Area and the hub of the region's educational institutions, healthcare, and social services. The city is expected to grow by 22,718 residents by 2028 and will require 4,517 new workers by 2025.

The city is recognized as a regional hub and will see most of its projected growth in healthcare and social assistance, accommodation and food services, and educational services.

Engagement Findings

- As the largest community in the region, Lethbridge had proportionally higher representation in the engagement process. Key themes that emerged included:
- COVID-19 has had a significant effect on the economy, causing businesses to adopt technology and job seekers to change their approaches to employment and the sectors they are choosing to work in
  - The most mentioned sectors seeing an increase in job postings by job seekers post COVID-19 were food services, healthcare, and agriculture.
  - 47% of job seeker respondents are temporarily or permanently laid off, and 14% have had their hours reduced.
- There is a perceived opportunity and skills gap between employers and job seekers in Lethbridge.
  - The majority of employers are 'very dissatisfied' or 'somewhat dissatisfied' with the availability of experienced workers in their industry and the availability of a trained, local workforce.
  - The vast majority of Lethbridge businesses indicated that the availability of qualified candidates was either a significant or somewhat of a challenge.
  - The top three occupations/positions that businesses in Lethbridge indicated they are likely to require included: Cashiers/helpers/general labourers, skilled trades and sales/service workers.
  - Job seekers reported a lack of suitable job opportunities and a lack of adequately paying jobs were the most mentioned factors that significantly hindered job seekers' ability to get a job/better job.

Overall, these factors indicate that while workers are abundant with the appropriate level of education, there is a disconnect between this education and the tangible skills employees bring into the workforce.

- Opportunities to address challenges
  - Industry and educators want to work together to understand what skills are needed and to prepare graduates for the workforce.
  - The importance of experiential learning to support soft skills development gaps and retention of the workforce to stakeholders.

Education Pipeline

The City of Lethbridge is home to two of the principal education institutions in Southwest Alberta, The University of Lethbridge, and Lethbridge College.

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

Workforce Projections

- Among all the critical sectors analyzed, health care is expected to have the highest projected demand by 2025. In total, the health care sector will require 1,041 new workers, followed by the tourism sector, which will require 614 new workers. Over the next five years, if the current educational pipeline maintains its trends and the region is successful in retaining graduates, the City will able to meet projected demand.
- COVID-19 is likely to have a depressing effect on many sectors in the short term; from the selected sectors, Tourism is expected to take the most significant hit. The other sectors are likely to see continued or increased growth, particularly healthcare, which has been stress tested throughout the pandemic.
- Overall, the City of Lethbridge, as a hub of education, has a significant oversupply of new graduates in every sector identified by the project team. However, the presence of graduates in the City does not mean they will remain to fill these projected jobs. The City should focus on not on how to increase the supply of skilled workforce but on connecting these individuals with local opportunities to retain them in the region.

2. Community Economic Context and Projections

2.1 Labour Supply and Demand/Projections/and Assessment

2.1.1 Population Growth

According to Manifold Data Mining, in 2018, the City of Lethbridge had a population of approximately 100,551 people; this represents 49% of the Study Area's total population and 2% of Alberta's residents. During the next ten years, the City's population is expected to grow by 23%, and this means 22,718 new people will reside in Lethbridge by 2028. The City will experience similar growth to the province and higher growth than the Study Area.

Figure 1: Population growth projections, 2018-2028

Year	Lethbridge, City	Study Area	Alberta
2018 Total population	100,551	206,271	4,417,880
2023 Total population	111,446	227,253	4,925,270
2028 Total population	123,269	250,136	5,490,940
10-year net change	22,718	43,865	1,073,060
10-year % change	23%	21%	24%

Source: Manifold Data Mining. 2018

2.1.2 Labour Force and Industry Sectors

Lethbridge's labour force grew 19% from 2011 to 2018, adding a total of 9,203 people to the workforce. This growth is only 2% lower than the increase experienced at the provincial level. Due to data limitations, labour force growth for the Study Area is not available.

Figure 2: Labour Force Change, 2011-2018

Period	Lethbridge, City	Study Area	Alberta
Labour force 2018	57,163	108,281	2,559,960
Labour force 2011	47,960	80,455	2,115,640
% Change	19%	Not applicable	21%

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

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

Most of the labour force in Lethbridge are employed in sectors such as health care and social assistance (14%), and retail trade (13%). These sectors also employ the largest share of the labour force in the Study Area and Alberta.

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

2-Digital Labor Force	Lethbridge	Study Area	Alberta
11 Agriculture, forestry, fishing and hunting	2%	8%	3%
21 Mining, quarrying, and oil and gas extraction	2%	3%	6%
22 Utilities	1%	1%	1%
23 Construction	8%	9%	10%
31-33 Manufacturing	8%	7%	6%
41 Wholesale trade	3%	3%	4%
44-45 Retail trade	13%	12%	11%
48-49 Transportation and warehousing	3%	4%	5%
51 Information and cultural industries	1%	1%	2%
52 Finance and insurance	3%	3%	3%
53 Real estate and rental and leasing	2%	1%	2%
54 Professional, scientific and technical services	5%	4%	7%
55 Management of companies and enterprises	0%	0%	0%
56 Administrative and support, waste management and remediation services	4%	4%	4%
61 Educational services	9%	8%	6%
62 Health care and social assistance	14%	13%	11%
71 Arts, entertainment, and recreation	2%	2%	2%
72 Accommodation and food services	8%	7%	7%
81 Other services (except public administration)	5%	5%	5%
91 Public administration	6%	5%	5%

Source: Manifold Data Mining. 2018

2.1.3 Labour Demand Projections

Metroeconomics projects that by 2025, a total of 4,517 workers will be needed to meet the employment demand in Lethbridge; this represented an increase of 10% compared to the employment estimates in 2020. Most of this growth will be in healthcare and social assistance, accommodation and food services, and educational services.

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

Industry Sector	2020	2025	Net Change	% Change
Total all industries	46,964	51,482	4,517	10%
11 Agriculture, forestry, fishing and hunting	527	535	8	2%
21 Mining, quarrying, and oil and gas extraction	103	106	3	3%
22 Utilities	317	316	- 1	-0.2%
23 Construction	2,209	2,446	237	11%
31-33 Manufacturing	4,251	4,242	- 9	-0.2%
41 Wholesale trade	1,325	1,336	10	1%
44-45 Retail trade	7,213	7,703	490	7%
48-49 Transportation and warehousing	1,136	1,313	178	16%
51 Information and cultural industries	657	690	33	5%
52 Finance and insurance	1,475	1,562	87	6%
53 Real estate and rental and leasing	894	991	97	11%
54 Professional, scientific and technical services	2,250	2,397	147	7%
55 Management of companies and enterprises	1,473	1,650	176	12%
56 Administrative and support, waste management and remediation services	4,694	5,213	519	11%
61 Educational services	8,226	9,534	1,308	16%
62 Health care and social assistance	904	1,021	118	13%
71 Arts, entertainment, and recreation	4,382	5,063	681	16%
72 Accommodation and food services	2,294	2,493	199	9%
81 Other services (except public administration)	2,635	2,872	237	9%

Source: metroeconomics 2020

2.1.4 Labour Supply and Demand – Job Postings Analysis

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

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

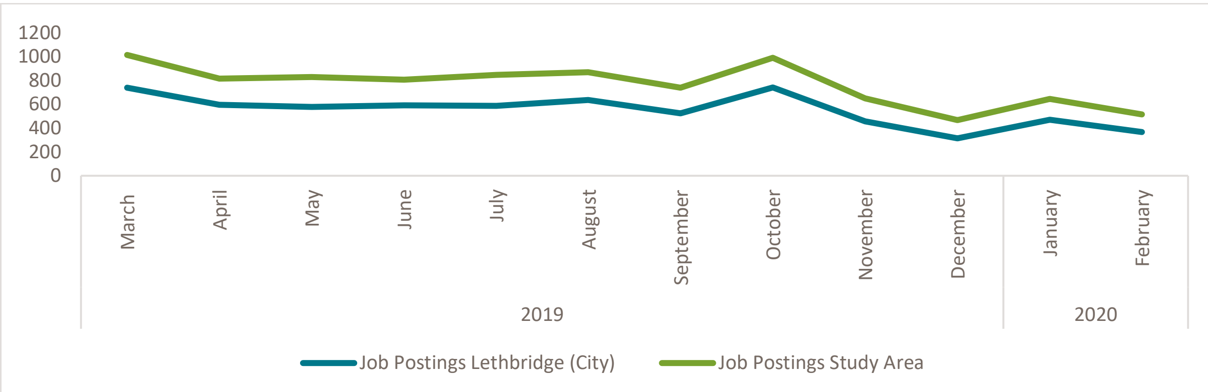
All labour demand and labour supply data provided in the following sections correspond to the job posting and job seekers published between **March 1, 2019, to February 29, 2020.** This report presents data for the City of Lethbridge.

Job Postings and Jobs Seekers in the City of Lethbridge

Figure 5 and Figure 6 show the trendlines of job postings and job seekers by month for the City of Lethbridge compared to the Southwest Alberta Study Area.

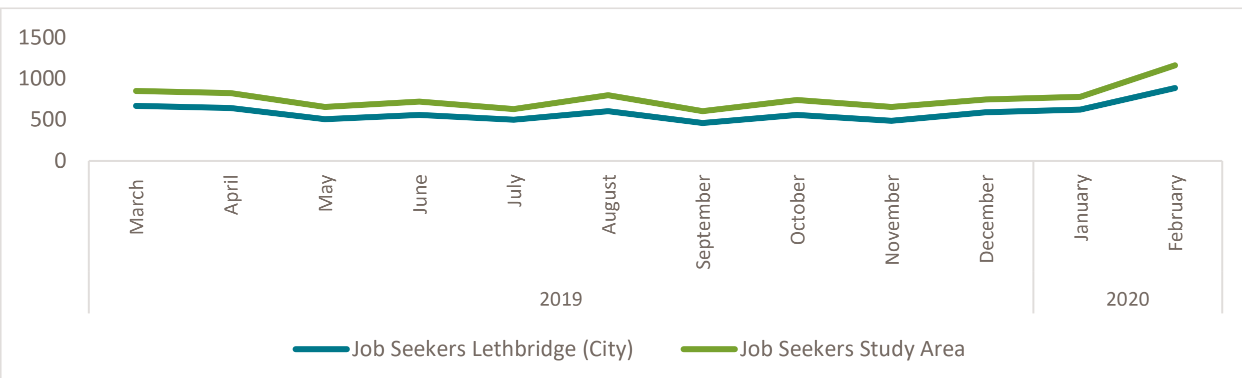
During the reporting period, a total of 6,597 job postings were recorded in the City of Lethbridge; this represented 72% of the Southwest Alberta Study Area. On the other hand, 7,071 job seekers were recorded in the City; this represented 77% of the region's job seekers. It is essential to mention that there was a more significant number of job seekers than job postings in the City of Lethbridge.

Figure 5: Job Posting by Month – March 1, 2019, to February 29, 2020



Source: Vicinity Jobs

Figure 6: Job Seekers by Month – March 1, 2019, to February 29, 2020



Source: Vicinity Jobs

Job Postings and Jobs Seekers by Industry Sector in the City of Lethbridge

During the reporting period, a total of 3,208 job posting and 2,098 job seekers were classified to an industry sector. The industry sectors with the most significant number of job postings in Lethbridge were retail trade, healthcare, and social assistance, and educational services. On the other hand, accommodation and food services, retail trade, and educational services were the industry sector targeted by job seekers.

Figure 7: Job Postings and Seekers by Industry Sector (2-Digit NAICS) – March 1, 2019, to February 29, 2020

NACIS	Job Postings*	Job Seekers**
11 - Agriculture, Forestry, Fishing and Hunting	0	3
21 - Mining and Oil and Gas Extraction	1	14
22 - Utilities	3	3
23 - Construction	36	36
31-33 - Manufacturing	335	253
41 - Wholesale Trade	93	97
44-45 - Retail Trade	695	352
48-49 - Transportation and Warehousing	44	67
51 - Information and Cultural Industries	102	34
52 - Finance and Insurance	229	57
53 - Real Estate and Rental and Leasing	15	15
54 - Professional, Scientific and Technical Services	200	69
56 - Administrative and Support, Waste Management and Remediation Services	89	34
61 - Educational Services	405	262
62 - Health Care and Social Assistance	564	130
71 - Arts, Entertainment and Recreation	18	17
72 - Accommodation and Food Services	327	616
81 - Other Services (except Public Administration)	8	23
91 - Public Administration	44	16

Source: Vicinity Jobs * Number of **Job Postings** applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 3,389 ** Number of **Job Seekers** applicable to the reporting period but excluded from this report's total due to lack of reliable and relevant information: 4,973

In terms of specific industry sectors, general medical and surgical hospitals were the industry sector with the most significant number of job postings (17% of total job postings associated with an industry sector). Followed by food services and drinking place, and depository credit intermediation.

Figure 8: Top 15 Job Postings by Industry Sector (4-Digit NAICS) – March 1, 2019, to February 29, 2020

NAICS	Job Postings	%
6221 - General Medical and Surgical Hospitals	538	17%
5221 - Depository Credit Intermediation	174	5%
6112 - Community Colleges and C.E.G.E.P.s	163	5%
4521 - Department Stores	139	4%
6113 - Universities	110	3%
5416 - Management, Scientific and Technical Consulting Services	102	3%
4481 - Clothing Stores	98	3%
3121 - Beverage Manufacturing	80	3%
4461 - Health and Personal Care Stores	75	2%
5152 - Pay and Specialty Television	75	2%
7225 - Full-service restaurants and limited-service eating places	74	2%
7211 - Traveller Accommodation	62	2%
5616 - Investigation and Security Services	61	2%
4452 - Specialty Food Stores	59	2%
4421 - Furniture Stores	56	2%

Source: Vicinity Jobs

Most of the job seekers looked for jobs in the full-service restaurants and limited-service eating places, followed by traveller accommodation, and general medical and surgical hospitals.

Figure 9: Top 15 Job Seekers by Industry Sector (4-Digit NAICS) – March 1, 2019, to February 29, 2020

NAICS	Job Seekers	
7225 - Full-service restaurants and limited-service eating places	253	12%
7211 - Traveller Accommodation	148	7%
6221 - General Medical and Surgical Hospitals	96	5%
4521 - Department Stores	86	4%
6113 - Universities	82	4%
4461 - Health and Personal Care Stores	50	2%
4441 - Building Material and Supplies Dealers	48	2%
3219 - Other Wood Product Manufacturing	39	2%
4451 - Grocery Stores	37	2%
6112 - Community Colleges and C.E.G.E.P.s	37	2%
4481 - Clothing Stores	29	1%
3114 - Fruit and Vegetable Preserving and Specialty Food Manufacturing	26	1%
2382 - Building Equipment Contractors	25	1%
4143 - Home Furnishings Wholesaler-Distributors	25	1%
4421 - Furniture Stores	25	1%

Source: Vicinity Jobs

Job Postings and Jobs Seekers by Occupational Category in the City of Lethbridge

During the reporting period, 31% of the job postings and 25% of job seekers were in the sales and service occupations. In the second place, the job postings showed a significant number of job postings in management occupations. On the other hand, trades, transport and equipment operators and related occupations were the second largest occupation in terms of job seekers.

Figure 10: Job Postings and Seekers by Occupational Category (1-Digit NOC) – March 1, 2019, to February 29, 2020

NOC	Postings	Job Seekers
0 - Management occupations	808	489
1 - Business, finance and administration occupations	634	455
2 - Natural and applied sciences and related occupations	101	99
3 - Health occupations	685	220
4 - Occupations in education, law and social, community and government services	439	310
5 - Occupations in art, culture, recreation and sport	87	142
6 - Sales and service occupations	2,072	1,794
7 - Trades, transport and equipment operators and related occupations	590	1,006
8 - Natural resources, agriculture and related production occupations	51	79
9 - Occupations in manufacturing and utilities	105	148
Other / Unidentified	1,025	2,329

Source: Vicinity Jobs

In terms of specific occupations, Lethbridge had the highest demand for retail salespersons (4%), retail and wholesale trade managers (3%), and cooks (3%).

Figure 11: Top 15 Job Postings by Occupational Category (4-Digit NOC) – March 1, 2019, to February 29, 2020

NOC	Job Postings	%
6421 - Retail salespersons	293	4%
0621 - Retail and wholesale trade managers	204	3%
6322 - Cooks	193	3%
3413 - Nurse aides, orderlies and patient service associates	145	2%
6311 - Food service supervisors	140	2%
3012 - Registered nurses and registered psychiatric nurses	136	2%
6411 - Sales and account representatives - wholesale trade (non-technical)	126	2%
3233 - Licensed practical nurses	112	2%
6235 - Financial sales representatives	107	2%
6552 - Other customer and information services representatives	102	2%
6623 - Other sales-related occupations	96	2%
4021 - College and other vocational instructors	84	1%
7452 - Material handlers	77	1%
6731 - Light duty cleaners	75	1%
7514 - Delivery and courier service drivers	75	1%

Source: Vicinity Jobs

Most of the job seekers looked for jobs in occupations such as cashiers (4%), retail salespersons (3%), and material handlers (3%).

Figure 12: Top 15 Job Seekers by Occupational Category (4-Digit NOC) – March 1, 2019, to February 29, 2020

NOC	Job Seekers	%
6611 - Cashiers	303	4%
6421 - Retail salespersons	241	3%
7452 - Material handlers	233	3%
6322 - Cooks	174	3%
6552 - Other customer and information services representatives	168	2%
6623 - Other sales-related occupations	159	2%
0621 - Retail and wholesale trade managers	128	2%
3413 - Nurse aides, orderlies and patient service associates	102	1%
6711 - Food counter attendants, kitchen helpers and related support occupations	100	1%
7612 - Other trades helpers and labourers	89	1%
6513 - Food and beverage servers	87	1%
7514 - Delivery and courier service drivers	84	1%
6731 - Light duty cleaners	72	1%
7237 - Welders and related machine operators	71	1%
7511 - Transport truck drivers	71	1%

Source: Vicinity Jobs

2.2 Labour Profile and Sector Analysis

The City of Lethbridge, along with the regional partners, identified the key industry sectors for the regional economy. These sectors are:

Sector	Total Labour	Total Businesses
Renewable Energy	314	17
Agricultural Manufacturing	1,133	33
Other Manufacturing	2,336	163
Tourism	6,179	480
Transportation Logistics and Warehousing	3,643	616
Agriculture	1,783	390
Healthcare and Social Assistance	8,021	869

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

Renewable Energy

A total of 314 residents were employed in the renewable energy sector; most of these people were employed in electric power generation, transmission, and distribution. In terms of businesses, a total of 17 companies were recorded in this sector in the City of Lethbridge: ten in remediation and other waste management services; six in electric power generation, transmission, and distribution; and one in engine, Turbine, and Power Transmission Equipment Manufacturing.

Figure 13: Labour Force and Business in Renewable Energy

NAICS	Labour Force	Total Businesses
2211 Electric Power Generation, Transmission and Distribution	285	6
3336 Engine, Turbine, and Power Transmission Equipment Manufacturing	11	1
5629 Remediation and Other Waste Management Services	18	10
Total	314	17

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

Agricultural Manufacturing

A total of 1,133 residents were employed in the agricultural manufacturing sector; most of these people were employed in fruit and vegetable preserving and specialty food manufacturing, followed by other food manufacturing. In terms of businesses, a total of 33 businesses were recorded in this sector in the City of Lethbridge. Most of these businesses were in other food production (9) and animal food manufacturing (7).

Figure 14: Labour Force and Business in Agricultural Manufacturing

NAICS	Labour Force	Total Businesses
3111 Animal food manufacturing	58	7
3112 Grain and oilseed milling	152	4
3113 Sugar and confectionery product manufacturing	30	0
3114 Fruit and vegetable preserving and specialty food manufacturing	354	3
3115 Dairy product manufacturing	136	1
3117 Seafood product preparation and packaging	29	0
3118 Bakeries and tortilla manufacturing	106	5
3119 Other food manufacturing	171	9
3121 Beverage manufacturing	96	4
3122 Tobacco manufacturing	1	0
Total	1,133	33

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

Other Manufacturing

A total of 2,336 residents were employed in other manufacturing industries; most of these people were employed in architectural and structural metals manufacturing (350 people) and other wood product manufacturing (255 people). In terms of businesses, a total of 163 businesses were recorded in this sector in the City of Lethbridge. Most of these businesses were in other miscellaneous manufacturing (26), household and institutional furniture and kitchen cabinet manufacturing (15), and printing and related support activities (14).

Figure 15: Labour Force and Business in Other Manufacturing

NAICS	Labour Force	Total Businesses
3132 Fabric mills	0	0
3133 Textile and fabric finishing and fabric coating	0	1
3141 Textile furnishings mills	0	0
3149 Other textile product mills	10	3
3151 Clothing knitting mills	0	0
3159 Clothing accessories and other clothing manufacturing	0	4
3161 Leather and hide tanning and finishing	0	1
3162 Footwear manufacturing	0	1
3169 Other leather and allied product manufacturing	0	0
3211 Sawmills and wood preservation	29	0
3212 Veneer, plywood and engineered wood product manufacturing	28	1
3219 Other wood product manufacturing	255	6
3221 Pulp, paper and paperboard mills	2	0
3222 Converted paper product manufacturing	2	0
3231 Printing and related support activities	73	14
3241 Petroleum and coal products manufacturing	34	2
3251 Basic chemical manufacturing	15	0
3252 Resin, synthetic rubber, and artificial and synthetic fibres and filaments	2	0
3253 Pesticide, fertilizer and other agricultural chemical manufacturing	2	0
3254 Pharmaceutical and medicine manufacturing	16	0
3255 Paint, coating and adhesive manufacturing	4	0
3256 Soap, cleaning compound and toilet preparation manufacturing	5	1
3259 Other chemical product manufacturing	34	2
3261 Plastic product manufacturing	111	6
3262 Rubber product manufacturing	1	0
3271 Clay product and refractory manufacturing	0	0
3272 Glass and glass product manufacturing	20	1
3273 Cement and concrete product manufacturing	78	8
3274 Lime and gypsum product manufacturing	10	0
3279 Other non-metallic mineral product manufacturing	23	3
3311 Iron and steel mills and ferro-alloy manufacturing	32	0
3312 Steel product manufacturing from purchased steel	6	1
3313 Alumina and aluminum production and processing	32	0
3314 Non-ferrous metal (except aluminum) production and processing	20	0
3315 Foundries	121	1
3321 Forging and stamping	9	0
3322 Cutlery and hand tool manufacturing	11	0
3323 Architectural and structural metals manufacturing	350	9
3324 Boiler, tank and shipping container manufacturing	133	5
3326 Spring and wire product manufacturing	6	0
3327 Machine shops, turned product, and screw, nut and bolt	70	4

NAICS	Labour Force	Total Businesses
3328 Coating, engraving, heat treating and allied activities	4	0
3329 Other fabricated metal product manufacturing	34	6
3331 Agricultural, construction and mining machinery manufacturing	74	8
3332 Industrial machinery manufacturing	16	1
3333 Commercial and service industry machinery manufacturing	4	2
3334 Ventilation, heating, A/C and commercial refrigeration equip.	14	2
3335 Metalworking machinery manufacturing	8	5
3336 Engine, turbine and power transmission equipment manufacturing	11	1
3339 Other general-purpose machinery manufacturing	31	1
3341 Computer and peripheral equipment manufacturing	2	0
3342 Communications equipment manufacturing	11	1
3343 Audio and video equipment manufacturing	0	0
3344 Semiconductor and other electronic component manufacturing	15	0
3345 Navigational, measuring, medical and control instruments	31	1
3346 Manufacturing and reproducing magnetic and optical media	0	0
3351 Electric lighting equipment manufacturing	0	0
3352 Household appliance manufacturing	1	0
3353 Electrical equipment manufacturing	1	0
3359 Other electrical equipment and component manufacturing	0	1
3361 Motor vehicle manufacturing	33	0
3362 Motor vehicle body and trailer manufacturing	89	3
3363 Motor vehicle parts manufacturing	56	1
3364 Aerospace product and parts manufacturing	110	1
3365 Railroad rolling stock manufacturing	1	0
3366 Ship and boat building	2	0
3369 Other transportation equipment manufacturing	19	0
3371 Household and institutional furniture and kitchen cabinet	51	15
3372 Office furniture (including fixtures) manufacturing	34	2
3379 Other furniture-related product manufacturing	16	0
3391 Medical equipment and supplies manufacturing	7	12
3399 Other miscellaneous manufacturing	117	26
Total	2,336	163

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

Tourism

A total of 6,179 residents were employed in tourism-related industries; most of these people were employed in full-service restaurants and limited-service eating places (3,708 people), and other amusement and recreation industries (661 people). In terms of businesses, a total of 480 businesses were recorded in this sector in the City of Lethbridge. Most of these businesses were full-service restaurants and limited service eating places (216), other amusement and recreation industries (67), and traveller accommodation (31).

Figure 16: Labour Force and Business in Tourism Related Industries

NAICS	Labour Force	Total Businesses
4532 Office supplies, stationery and gift stores	181	20
4811 Scheduled air transportation	37	0
4812 Non-scheduled air transportation	2	4
4821 Rail Transportation	164	0
4872 Scenic and sightseeing transportation, water	0	1
5615 Travel arrangement and reservation services	62	14
7111 Performing arts companies	43	30
7112 Spectator sports	81	9
7113 Promoters (presenters) of performing arts, sports and similar events	49	6
7114 Agents and managers for artists, athletes, entertainers and other public figures	0	1
7115 Independent artists, writers and performers	43	22
7121 Heritage institutions	198	4
7131 Amusement parks and arcades	8	3
7132 Gambling industries	119	6
7139 Other amusement and recreation industries	661	67
7211 Traveller accommodation	431	31
7212 Recreational vehicle (RV) parks and recreational camps	17	6
7213 Rooming and boarding houses	0	0
7223 Special food services	258	21
7224 Drinking places (alcoholic beverages)	117	19
7225 Full-service restaurants and limited service eating places	3,708	216
Total	6,179	480

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

Transportation Logistics and Warehousing

A total of 3,643 residents were employed in transportation logistics and warehousing industries; most of these people were employed in general freight trucking (535 people) and specialized freight trucking (298 people). In terms of businesses, a total of 616 businesses were recorded in this sector in the City of Lethbridge. Most of these businesses were in general freight trucking (144) and specialized freight trucking (76).

Figure 17: Labour Force and Business in Transportation Logistics and Warehousing

NAICS	Labour Force	Total Businesses
4111 Farm product merchant wholesaler	94	10
4121 Petroleum and petroleum products merchant wholesalers	30	6
4131 Food merchant wholesalers	140	19
4132 Beverage merchant wholesalers	52	6
4133 Cigarette and tobacco product merchant wholesalers	3	0
4142 Home entertainment equipment and household appliance merchant wholesalers	5	2
4143 Home furnishings merchant wholesalers	14	1
4144 Personal goods merchant wholesalers	48	0
4145 Pharmaceuticals, toiletries, cosmetics and sundries merchant wholesalers	12	8
4151 Motor vehicle merchant wholesalers	72	14
4152 New motor vehicle parts and accessories merchant wholesalers	111	18
4153 Used motor vehicle parts and accessories merchant wholesalers	19	1
4161 Electrical, plumbing, heating and air-conditioning equipment and supplies merchant wholesalers	137	20
4162 Metal service centres	97	4
4163 Lumber, millwork, hardware and other building supplies merchant wholesalers	155	37
4171 Farm, lawn and garden machinery and equipment merchant wholesalers	229	21
4172 Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	142	20
4173 Computer and communications equipment and supplies merchant wholesalers	18	4
4179 Other machinery, equipment and supplies merchant wholesalers	49	17
4182 Paper, paper product and disposable plastic product merchant wholesalers	16	2
4183 Agricultural supplies merchant wholesalers	98	15
4184 Chemical (except agricultural) and allied product merchant wholesalers	18	5
4189 Other miscellaneous merchant wholesalers	40	12
4191 Business-to-business electronic markets, and agents and brokers	90	12
4811 Scheduled air transportation	37	0
4812 Non-scheduled air transportation	2	4
4821 Rail Transportation	164	0
4841 General freight trucking	535	144
4842 Specialized freight trucking	298	76
4851 Urban transit systems	21	1
4852 Interurban and rural bus transportation	16	0
4853 Taxi and limousine service	76	35
4854 School and employee bus transportation	41	0
4855 Charter bus industry	11	2
4859 Other transit and ground passenger transportation	11	3
4862 Pipeline transportation of natural gas	1	0
4869 Other pipeline transportation	0	0
4871 Scenic and sightseeing transportation, land	0	0
4872 Scenic and sightseeing transportation, water	0	1
4881 Support activities for air transportation	50	6

NAICS	Labour Force	Total Businesses
4882 Support activities for rail transportation	23	2
4883 Support activities for water transportation	21	0
4884 Support activities for road transportation	82	8
4885 Freight transportation arrangement	56	5
4889 Other support activities for transportation	2	5
4911 Postal service	171	1
4921 Couriers	143	26
4922 Local messengers and local delivery	22	17
4931 Warehousing and storage	109	12
5615 Travel arrangement and reservation services	62	14
Total	3,643	616

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

Agriculture

A total of 1,783 residents were employed in agriculture industries; most of these people were employed in farms - except greenhouses and aquaculture (1,049 people), and farm, lawn and garden machinery and equipment merchant wholesalers (229 people). In terms of businesses, a total of 390 businesses were recorded in this sector in the City of Lethbridge. Most of these businesses were farms - except greenhouses and aquaculture (269), support activities for farms (44), and farm, lawn and garden machinery and equipment merchant wholesalers (21).

Figure 18: Labour Force and Business in Agriculture

NAICS	Labour Force	Total Businesses
1110 Farms (except Greenhouses and Aquaculture) (1111 to 1124 and 1129)	1,049	269
1114 Greenhouse, nursery and floriculture production	39	1
1125 Aquaculture	1	0
1141 Fishing	6	0
1142 Hunting and trapping	0	3
1150 Support activities for farms (1151 and 1152)	53	44
1153 Support activities for forestry	19	2
4111 Farm product merchant wholesaler	94	10
4131 Food merchant wholesalers	140	19
4132 Beverage merchant wholesalers	52	6
4133 Cigarette and tobacco product merchant wholesalers	3	0
4171 Farm, lawn and garden machinery and equipment merchant wholesalers	229	21
4183 Agricultural supplies merchant wholesalers	98	15
Total	1,783	390

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

Healthcare and Social Assistance

A total of 8,021 residents were employed in the healthcare and social assistance sector; most of these people were employed in hospitals (2,205 people), and nursing and residential care facilities (1,511 people). In terms of businesses, a total of 869 businesses were recorded in this sector in the City of Lethbridge. Most of these businesses were offices of physicians (277), offices of other health practitioners (229), and child day-care services (130).

Figure 19: Labour Force and Business in Healthcare and Social Assistance

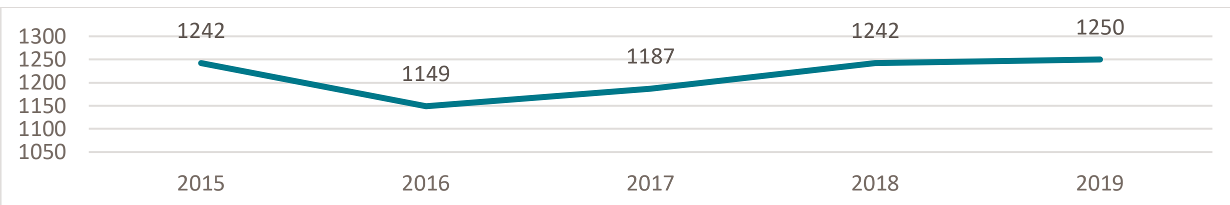
NAICS	Labour Force	Total Businesses
6211 Offices of Physicians	948	277
6212 Offices of Dentists	482	80
6213 Offices of Other Health Practitioners	753	229
6214 Out-patient care centres	268	33
6215 Medical and Diagnostic Laboratories	81	10
6216 Home Health Care Services	182	13
6219 Other Ambulatory Health Care Services	101	2
6220 Hospitals (6221 to 6223)	2,205	6
6230 Nursing and residential care facilities (6231 to 6239)	1,511	28
6241 Individual and Family Services	760	53
6242 Community Food and Housing, and Emergency and Other Relief Services	43	4
6243 Vocational Rehabilitation Services	79	4
6244 Child day-care services	608	130
Total	8,021	869

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

2.3 Education Pipeline and Graduation Rates/Patterns

An average of 1,214 students per year have enrolled in schools within the Lethbridge area (City and county together). Recognizing that these students will go on to pursue a wide array of career paths, some outside of the region, the numbers show a promising trend for the supply of new talent to the area. The Southern Alberta Occupations Requirements section of the Phase 1 Report projected that between 2020 and 2025, there will be a net demand of 4,158 new job openings that will need to be filled due to newly created positions and upcoming retirements. If the number of final-year secondary students remains constant for the next five years, this will result in approximately 6,070 new young workers graduating secondary school and beginning post-secondary education/training or entering the workforce. While the number of expected graduates is higher than the anticipated demand for new workers in the City, Lethbridge's ability to provide labour will depend on the career paths that these students pursue and the ability of the City to retain that talent. To ensure that there is an adequate number of qualified individuals within each discipline, the City will require a pipeline of young workers that is proportionate to the employment needs and opportunities in the local labour market.

Figure 20: Grade 12 enrollment in the Lethbridge City Area (Includes Lethbridge County) 2015-2019



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

In terms of post-secondary graduates, the data was divided by college graduates and university graduates to distinguish the skill levels A (university education) and B (college education). The data presented bellow identifies individuals who completed a program at a public post-secondary institution in the Lethbridge Service Area (Figure 23). These institutions include the University of Lethbridge and the Lethbridge College.

University Education

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

Figure 21: Estimates of numbers of graduates - University of Lethbridge (2014 to 2019)

Program Band	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	Total
Business	470	461	473	448	409	2,261
Education	239	245	252	226	249	1,211
Health Science	383	381	324	317	332	1,737
Languages, Social Sciences, Arts & Humanities	457	458	428	414	424	2,181
Legal & Security	0	0	0	0	0	0
Physical, Natural & Applied Sciences	235	242	251	266	266	1,260
Recreation	95	94	99	90	92	470
Trades & Technologists	0	0	0	0	0	0
Total	1,879	1,881	1,827	1,761	1,772	9,120

Source: LERS Cubes

College Education

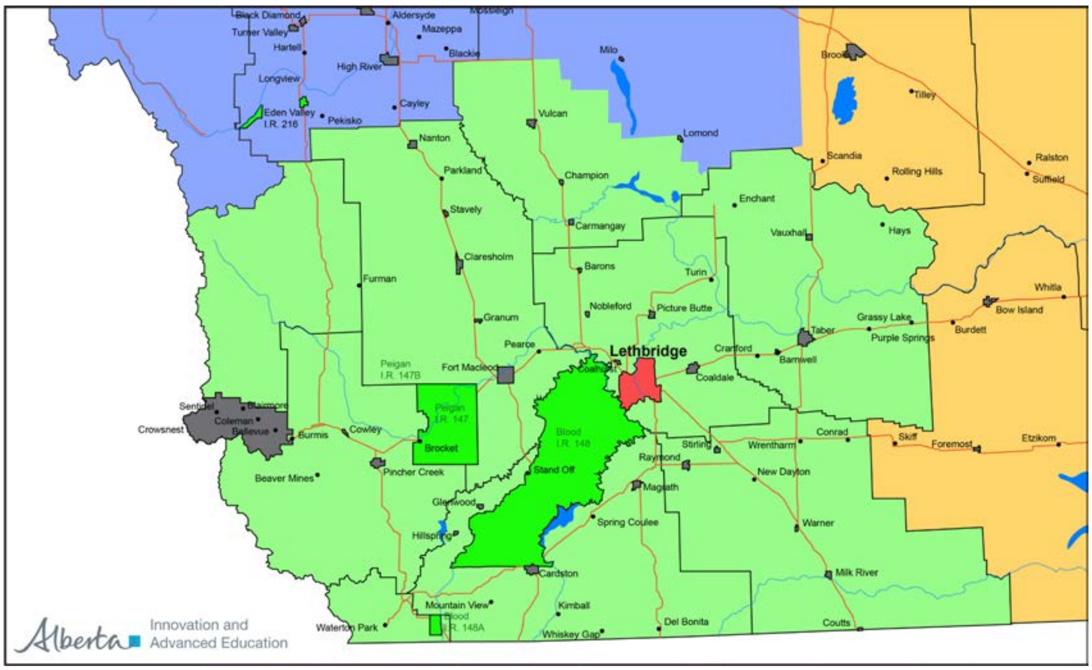
Most of the individuals who graduated from Lethbridge College between 2014 and 2019 obtained a diploma in trades and technologies, followed by health science, and legal and security.

Figure 22: Estimates of numbers of graduates – Lethbridge College (2014 to 2019)

Program Band	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	Total
Business	161	148	162	137	148	756
Education	12	21	38	47	39	157
Health Science	362	336	313	308	363	1,682
Languages, Social Sciences, Arts & Humanities	229	159	186	164	197	935
Legal & Security	200	144	211	220	302	1,077
Physical, Natural & Applied Sciences	183	181	192	212	239	1,007
Recreation	16	15	20	18	18	87
Trades & Technologists	393	396	378	361	312	1,840
Total	1,556	1,400	1,500	1,467	1,618	7,541

Source: LERS Cubes

Figure 23: Lethbridge Service Area – Innovation and Advanced Education Alberta



Source: Alberta Ministry of Innovation and Advanced Education

3. Local Consultation and Engagement

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

A wide range of inputs from approximately 780 individuals in the Study Area has helped form this local consultation and engagement report. Drawing from the extensive consultative initiatives that were held between February and June 2020, this report offers a synopsis of the emerging themes and priorities that have evolved through a comprehensive analysis of all inputs relating to Lethbridge. It is these themes and priorities that reflect the perceptions of participants.

The majority of respondents in all engagement activities indicated they are residents of Lethbridge in many cases, the themes identified in the Southwest Alberta Regional Skills Study Consultation Input Summary Report are echoed here. Each section below highlights the themes most relevant to Lethbridge; for the full engagement report, see the Southwest Alberta Regional Skills Study Consultation Input Summary Report.

3.1 Business Telephone Survey

Employer surveys were completed across the Southwest Region through direct telephone interviews and supplemented with an online web link to allow for flexible participation. The activity was interrupted and delayed as a result of COVID-19 emergency measures causing businesses to close temporarily. This resulted in the data collection being separated into two parts. Part one ran until mid-March, resulted in 309 completes. To achieve the goal of 400 total completes, the survey was relaunched in late May, resulting in an additional 95 completes, surpassing our goal. The part two survey was revised to include several COVID-19 specific questions to inform how the pandemic has influenced skills requirements. The surveys probed workforce demand, skills need, challenges, and immigration considerations. In part, one 151 respondents were located in Lethbridge in part two, 64, for a total of 215. The purpose of this section of the report is to highlight key insights from the survey that are relevant to Lethbridge.

3.1.1 Local Employer Survey Part 1

NOTE: Numbers of respondents varied per question, causing a variance in the number of businesses noted in question analysis.

Profile of Local Businesses and Employees

- **Business Location –** The largest group of survey respondents, 151 or 49% of the total, are in Lethbridge. A further 15 businesses indicated they had multiple locations, one of which in Lethbridge for a total of 167 surveyed companies with a location in the City. The majority of businesses in Lethbridge (82%) are locally owned and operated.

- **Years of Operation –** 73% of businesses have been operating for more than ten years, while 1% are less than a year old, and 10% have been in operation for 1 to 5 years.
- **Industry Type –** Out of the 151 businesses in Lethbridge, the top three industry types included: General Manufacturing (11%), transportation (10%) and agriculture (9%). When compared to all survey responses across the Study Area, agriculture was the largest category at 19.4%.
- **Number of Employees –** Almost half (48%) of businesses surveyed have 1-5 employees. Medium-sized businesses classified as having 11 to 50 employees were the next largest group at 27% of responses, while those with 51-100+ employees were 5%.
- **High Level of Business Satisfaction –** The vast majority (93%) of Lethbridge business owners indicated that they were either 'very satisfied' or 'somewhat satisfied' with operating in the Southwest Alberta region.

Key Business Talent Attraction and Retention Satisfaction Indicators

- **Challenges related to recruiting, hiring, and retaining employees –** Most businesses in Lethbridge (51%) have faced challenges in recruiting or retaining talent. Of those that have had challenges, the majority (95%) indicated that the availability of qualified candidates was either 'a significant' or 'somewhat of a challenge.' Other challenges identified by the respondents were an ageing workforce/retirement (36%) and drugs & alcohol issues.
- **Difficult skills, knowledge and/or abilities to hire or retain –** Lethbridge businesses indicated that the most challenging attributes to hire or retain are employees with a drivers licence (particularly class 1 and class 3), employees who are proactive and take the initiative/embody leadership skills, advanced technology skills and skilled trade workers (e.g. equipment operators, welders etc.).
- **12-month hiring intentions –** 60% of Lethbridge businesses indicated that they are planning to hire new employees within the coming year, which is in line with the overall Southwest Alberta region at 52%.
- **In-demand occupations/positions –** The top three most mentioned occupations/positions that businesses in Lethbridge indicated they are likely to require included: Cashiers/helpers/general labourers (28% of mentions), skilled trades (25% of mentions), and sales/service workers (22% of mentions).
- **Level of satisfaction regarding workforce development –** Lethbridge respondents were 'very satisfied' or 'somewhat satisfied' with professional development opportunities for staff (70%), the availability of prime-working-aged people (ages 25-54) in the region (72%) and the availability of workers with the appropriate education (69%). Conversely, they were 'very dissatisfied' or 'somewhat dissatisfied' with the availability of experienced workers in their industry (51%) and the availability of a trained local workforce (49%). Overall, these factors indicate that while are sufficient workers with the appropriate level of education, there is a disconnect with experience and trained workers.
- **Likelihood of staying in the region –** Slightly below half of Lethbridge respondents (35%) indicated that difficulties with skilled labour retention or recruitment are likely, somewhat likely, or very likely to influence their decision to stay operating within the region. This is an important indicator to monitor as it influences business retention.

Support Requirements

- **Needed educational/training services –** The most commonly mentioned educational training or certification programs that Lethbridge businesses mentioned included: more class 1 and class 3 drivers licence training programs, more significant soft skill development support programs, particularly for youth, a greater focus on trade training for students during high school as respondents felt there is currently too much focus on post-secondary (university) education and fewer pathways into trades.
- **Tendency to hire local talent –** 72% of Lethbridge respondents indicated that they do not recruit labour from outside of the region, in line with the 67% reported from all survey respondents within the Southwest Alberta region. When hiring outside of Alberta, BC or Saskatchewan were the top mentioned provinces of choice.
- **Limited R&D investments within Lethbridge –** 61% of Lethbridge respondents indicated that they do not allocate any percentage of revenue towards R&D activities. Of those firms that do engage with R&D, the majority (24%) spend less than 10% of total revenue.
- **Talent retention and recruitment should be prioritized in this strategy –** 24% of Lethbridge respondents felt that the retention of talent is the most critical labour force issue that requires focus in the strategy, followed by recruitment of talent to the area (19%). Respondents also felt that better understanding what the region has to offer need significant focus.
- **Current business employee retention and attraction tactics –** Employers noted that the most common way they attract or retain employees within Lethbridge is through financial benefits such as above-average wages, better benefits, or investments in ongoing training. Some companies mentioned providing flexible working options to young families and ongoing mentorship services.
- **Spending on professional development activities –** Of those respondents who knew their professional development spend, 15% of Lethbridge respondents indicated that they do not spend anything. Of those that do spend money, 28% spend between $1 and $1,000 on development activities. When asked what they expect to spend on professional development next year, nearly half (46% of respondents) indicated that they expected it to remain the same.
- **Lethbridge businesses encourage employee training and development –** 82% of Lethbridge respondents indicated that they ‘strongly agree’ or ‘somewhat agree’ that they encourage and support employees that want to learn new skills by helping them complete accredited training programs.

Hiring Immigrant Workers

- **ESL/Language barriers are the most mentioned factor impeding Lethbridge businesses hiring immigrant workers –** Followed by concerns regarding the qualification’s professional designations. 50% of respondents indicated that they do not feel they have any barriers preventing the hiring of immigrant workers.
- **Improved access to language and culture training was the most mentioned factor to increase the business's likelihood of hiring immigrant workers –** Followed by strategies to create and maintain a diverse workforce.

3.1.2 Local Employer Survey Part 2

Profile of Local Businesses and employees

- **Businesses type –** Of the 64 Lethbridge businesses included in this survey, 78% are locally owned and operated, compared to 81% for the entire survey region.
- **Years of operation –** The majority of Lethbridge businesses surveyed had been in operation for more than ten years (78%), with 13% operating for 1 to 5 years.
- **Industry type –** The most common industry of those Lethbridge businesses surveyed was agriculture (14%), followed by general manufacturing (11%), healthcare and social assistance (5%) and logistics and warehousing (5%).
- **Number of employees –** The majority of Lethbridge businesses surveyed were small businesses with less than ten employees (66%), three percent less than the entire survey area. Only 9% were medium to large businesses with more than 50 employees.
- **Lethbridge businesses are overall satisfied with operating within the Southwest Alberta Region –** 94% of surveyed businesses indicated that they were either 'very satisfied' or 'somewhat satisfied,' which equals the overall results gained from the whole survey region.

Pre-COVID-19

Key Challenges when recruiting, hiring, and retaining employees – When asked to identify challenges, the availability of qualified candidates was the top-ranked response, with 61% of respondents stating it as either a 'significant challenge' or 'somewhat of a challenge.' Drugs & alcohol issues were the second-highest ranked challenge at 20% of total responses, followed by an ageing workforce/retirement (17% of respondents). Lethbridge businesses indicated that the availability of transportation and language barriers to be either 'not much of a challenge' or 'not a challenge' at 92% and 83%, respectively.

COVID-19 Questions

- **COVID-19 has had a significant impact on Lethbridge businesses –** 75% of Lethbridge respondents indicated that the pandemic had an impact on the health of their businesses with activity decreasing 'slightly' or 'significantly.' This result is 5% higher than the overall survey region.
- **Responses to COVID-19 –** Lethbridge business's most common response to COVID-19 was to limit employee travel, followed by shortening hours of operation and requiring employees to work from home. Overall, these findings are in line with the broader Southwest survey region.
- **Short term planning outlook –** When asked about their plans if the current COVID-19 situation worsens, Lethbridge business owners stated that they plan to continue as business as usual (45%) followed up potentially laying of additional staff (23%). Overall, both actions are in line with the total Study Area (responses +/- 1%).
- **Most Lethbridge businesses workforce surveyed cannot work remotely –** 36% of Lethbridge businesses surveyed indicated that none of their workforces was able to work remotely, lower than the survey region (46%).
- **Workforce development activities taken during COVID-19 –** Lethbridge businesses' most commonly mentioned activity taken during COVID-19 was 'considered committing to future investment in skills development,' followed by 'a re-evaluation of the skills required to support future operations.'

- **Short-term hiring intentions –** Results were primarily split around hiring intentions for the upcoming 12 months, with 55% of Lethbridge businesses indicating that they do intend to hire new employees, compared to 48% for the entire survey region. Note, this does not include rehiring those that may have been laid off due to COVID 19.
- **In-demand occupations/positions:** When asked to indicate the top in-demand occupations/positions, the most common response was skilled trades, followed by sales/service occupations and Cashier/Helper/Labourers.
- **Level of satisfaction regarding workforce development –** The availability of workers with the appropriate education was the highest-ranked response, with 72% of Lethbridge businesses being either 'very satisfied' or 'somewhat satisfied.' Businesses were also 'very satisfied' with the productivity of a trained local workforce (25%) and professional development opportunities for staff (28%). Conversely, respondents were most dissatisfied with the availability of experienced workers in their industry (44%), the availability of a diverse workforce to recruit from (31%) and availability of workers with the necessary 'soft' skills (30%).
- **Likelihood of staying in the region –** 49% of Lethbridge respondents indicated that difficulties with skilled labour retention or recruitment were 'very likely' or 'somewhat likely' to influence their decision to stay operating within the region.

3.2 Job Seeker Survey

The survey targeted job seekers that were unemployed, underemployed, or employed and looking for new opportunities. The survey was available through a web-based link and resulted in 56 online completes in Part 1, which launched in early March and closed in mid-March. For the relaunch in late May, the survey was revised to include additional questions that were focused on COVID-19 impacts. Part two resulted in 215 completes for a total of 271 completed surveys. The Southwest Alberta Skills Partnership organizations promoted the survey broadly across the region to maximize awareness and engagement and offered a prize draw to promote participation.

3.2.1 Job Seeker Survey Part 1

An online survey was advertised to Job seekers in the Study Area in March 2020. The survey ended with 42 completed questionnaires from Job seekers in Lethbridge. Respondents were asked about their perceptions of the local labour market and the available jobs in the City of Lethbridge.

Some key points that the responses identified included the following:

Profile of Job Seekers:

- The majority (60%) of respondents were aged between 25-44 and would be considered a part of the core workforce in Lethbridge.
- 71% of respondents have lived in Lethbridge for longer than ten years
    - Compared to 75% in the overall study group that has lived in Southwest Alberta for longer than ten years
- 41% of respondents had a University Degree, and 98% of respondents had education beyond a high school diploma

Employment Characteristics of Job Seekers:

- 69% of respondents were employed in this first wave
    - This is 4% less than the overall Study Area
- 76% of respondents were seeking new/additional employment
    - This is 5% higher than the overall Study Area
- On the other hand, 53% of respondents are considering moving out of the Lethbridge to secure employment
    - This is 9% higher than the overall Study Area
- 56% of respondents have been actively seeking employment for over six months.

Job seekers current job status:

- The most significant proportion of respondents are currently working in a management (26%) or a cashier/helper/labourer role (14%)
- 76% of respondents are making less than $35 an hour
    - This is 11% lower than the overall Study Area

Job seekers view of the job market:

- The majority of respondents feel relevant educational programming is good or excellent (62%)
- On the other hand, respondents feel there are “poor or fair” jobs that match their skillset (81%) and offer adequate pay (62%)
  - Comparable to 75% for jobs that match their skillset and 74% for adequately paying jobs found in the overall study
- A lack of suitable job opportunities and a lack of adequately paying jobs were also the most mentioned factors that significantly hindered job seekers' ability to get a job/better job.

Job seekers view on the job search support system

- The majority of job seekers use online job boards (79%) such as Indeed and Workopolis or social media (57%) when looking for a job
  - Social Media usage for respondent’s job search is 12% higher in Lethbridge compared to the overall study
- They also rely on job description information (69%) and employer websites (64%) to decide on their career paths
  - Comparable to 66% for job description information and 59% for employer websites found in the overall study
- A large proportion of them use federal (50%) and provincial (43%) government websites to find relevant labour market information and do not work with an employment service organization (91%).

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

- A large portion of job seeker respondents feel access to opportunities (83%) and career/employment counselling (43%) would help them achieve their full employment potential
  - Comparable to 79% for access to opportunities and 34% for career/employment counselling found in the overall study
- It's noteworthy that despite employment counselling being valued, few respondents work with an employment service organization
- Many respondents also feel on the job training (50%) and a professional designation (45%) would enhance their employability
  - Comparable to 48% for on the job training and 39% for professional designation found in the overall study

3.2.2 Job Seeker Survey Part 2

The second release of the online survey was advertised to Job seekers in the Lethbridge in June 2020. The survey ended with 138 completed questionnaires. Respondents were asked about their perceptions of the local labour market and the available jobs in the City of Lethbridge.

Some key points that the responses identified included the following:

Implications of COVID-19

- 77% of respondents mentioned they were very likely or likely going to consider employment in occupations that they may not have considered in the past
  - This is 2% lower than the overall Study Area
- The most mentioned sectors seeing an increase in job postings post COVID-19 were food services (56%), healthcare (32%) and agriculture (17%)
- It was mentioned by 22.5% of respondents that no sectors had increased postings
- Furthermore, 47% of respondents are temporarily or permanently laid off, and 14% have had their hours reduced
  - This is comparable to 49% of respondents in the overall study temporarily or permanently laid off, and 16% stating their hours are reduced.

Profile of Job Seekers:

- A large proportion (50%) of respondents are aged between 25-44 and would be considered a part of the core workforce in Lethbridge. 13.1% of respondents were over the age of 55.
  - Lethbridge respondents were younger than the overall Study Area, with individuals aged 55+ making up 17% of respondents in the overall Study Area
- 67% of respondents have lived in Lethbridge for longer than ten years. 49% of respondents have lived in the City for over 20 years
- 31% of respondents had a university degree, and 86% of respondents had an education beyond a high school diploma
  - Lethbridge has 5% more individuals with a university degree than the overall Study Area.

Employment Characteristics of Job Seekers:

- 44% of respondents were employed in this second wave survey
  - This is 3% less than the overall Study Area (47%)
- 78% of respondents were seeking new/additional employment
- 57% of respondents are considering moving out of the Southwest Alberta Region to secure employment
  - This is 4% higher than the overall Study Area (53%)
- 60% of respondents have been actively seeking employment for less than six months.

Job seekers current job status:

- The most significant proportion of respondents are currently working in healthcare (15.2%) or a sales/service role (12.3%)
  - Clerical/administrative and healthcare were the most significant proportion in the overall Study Area with both making up 13% each
- 89% of respondents are making less than $35 an hour

    - This is 3% higher than the overall Study Area

Job seekers view of the job market:

- The majority of respondents feel there are "poor or fair" jobs that match their skillset (78%), opportunities to enhance their skillset (78%), relevant education programs (54%), employment assistance services (76%), and adequately paying jobs (76%)
    - Comparable to 75% of respondents in the overall Study Area rating poor or fair to jobs that match their skill set, opportunities to enhance their skillset (74%), relevant education programs (57%), employment assistance services (74%) and adequately paying jobs (74%)
- A lack of suitable job opportunities (mentioned by 87% of respondents) and a lack of adequately paying jobs (mentioned by 71% of respondents) were the most mentioned factors that significantly hindered job seekers' ability to get a job/better job.

Job seekers view on the job search support system

- The majority of Jobseeker respondents use online job boards (89%) such as Indeed and Workopolis or social media (64%) when looking for a job
    - 7% more people in Lethbridge use online job boards then the overall Study Area
- They also rely on job description information (mentioned by 57% of respondents) and wage rates and benefits (mentioned by 54% of respondents) to decide on their career paths
- A large proportion of them use federal (mentioned by 48% of respondents) and provincial (mentioned by 42% of respondents) government websites to find relevant labour market information and do not work with an employment service organization (94%)
    - 6% more people use federal job boards in Lethbridge relative to the overall Study Area.

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

- A large portion of job seeker respondents feel access to opportunities (mentioned by 61% of respondents) and career/employment counselling (mentioned by 33% of respondents) would help them achieve their full employment potential
    - Comparable to 79% for access to opportunities and 34% for career/employment counselling, which was the factor job seekers in the overall Study Area stated would help them achieve their full employment potential
- Many respondents also feel on the job training (mentioned by 57% of respondents) and a certification (mentioned by 24% of respondents) would enhance their employability
    - 8% more respondents mentioned certification in the overall Study Area relative to Lethbridge.

3.3 Key Informant Interviews

A total of 35 key informant interviews were completed with identified stakeholders throughout the region; these included educational representatives, businesses, immigration service providers, local government, and workforce service providers. Twenty-one interviews from the City of Lethbridge were conducted exclusive to SouthGrow interviews and provided the following Analysis.

3.3.1 Employers Point of View on the Local Regional Skills Gap

Availability of Talent

The stakeholders interviewed had a wide diversity of opinions on the general availability and quality of talent. A significant number of interviewees mentioned large numbers of unskilled or lower-skilled workers are currently looking for work in the Region and seem to be applying for jobs indiscriminately, creating challenges for the hiring staff of local businesses.

Some firms that require more specialized skillsets identified challenges in finding skilled and experienced professional-level staff in niche industries. Many of these individuals recognized the skill sets they are looking for are rare in the Region, and there are not concentrations of firms doing similar work, creating fewer opportunities. These businesses often cited the importance of internships and co-op training, where they have the opportunity to develop talent with the skills they cannot find in the market.

New Generation of Workers

Some stakeholders mentioned challenges related to a gap in understanding between employers and the new generation of workers, leading to a concern with employee turnover and rising hiring and training costs. Examples included millennials wanting more flexible hours and more input and decision-making ability in their work. There was a sense that young people don't understand the growth that comes with a minimum wage role or a position that is hands-on work. It was noted that career exploration events at school would help young people make more informed career decisions, and HR consultants could help firms better understand the needs of their younger workers.

Wage Competition

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

3.3.2 Employers Perspective on Job Seekers Point of View on the Local Regional Skills Gap

Quality of Employment Opportunities

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

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

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

Gap Between Job Seeker Skills and Employer Expectations

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

Wage Expectations

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

Large Influx of Job Applications

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

3.3.3 Education and Training – Challenges and Opportunities

Challenge - Align Education and Training with Needs of Local Employers

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

Challenge - Promoting Education in Sectors Requiring More Labour

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

Opportunity – Collaboration Between Businesses and Education/Training Institutions

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

Opportunity – Invest in Career Development at a Younger Age

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

3.4 Regional Roundtables

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

3.4.1 Educator Roundtable

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

- COVID-19 is creating a great deal of uncertainty, creating high unemployment, and shifting the skills required by employers
- Improving accessibility to training through micro-credentialing and encouraging employers to invest in training is a primary focus
- There is broad consensus that youth need to have more opportunities for experiential learning, including tours, co-ops, and internships
- Participants agreed that new graduates are having difficulty articulating soft skills and experience when they apply for their first job, making it more difficult for them to find employment

According to educators, the top challenges facing employers are:

- Soft Skills, disconnect between employers and job seekers, COVID Uncertainty and Difficulty clarifying soft skills and experience

The top challenges educators are facing:

- Funding, New program competencies in skills areas, Employers not funding professional development
- There is a consensus that due to lack of funding and the need to be more effective, education institutions will need to work together with industry to:
  - Develop and access LMI, including alumni tracking
  - Provide more up to date, flexible and online programming
  - Connect Students to jobs by making them aware of the opportunities
  - Improve Experiential Learning
  - There is a consensus that a wide variety of excellent programs are available but not always easy to access or do not have broad awareness, highlighting the need for improved LMI and coordination

3.4.2 Industry Roundtable

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

Top Workforce Challenges Employers are Facing:

- Lack of Soft Skills among staff
- Wages and the high expectations of new graduates
- Recruitment and attracting workforce to the region is difficult, lack of awareness of the area and what it has to offer in both lifestyle and work opportunities
- Continuous learning access and support
- Transition Training
- The ratio of new grads to retirees is concerning to several businesses, specifically in the trucking industry

- Micro credentialing, including a system of recognition of soft skills, was an area of interest for the employers
- Lack of awareness of all the programming and supports that exist in the region
- A clear desire to collaborate more closely with Secondary and Post Secondary institutions to improve student awareness of local opportunities, career pathways and experiential learning
- A desire to make the process of connecting with students more accessible and less labour intensive
- Employers would like to see KPI's relating to post-secondary outcomes, placements, and retention in the region
- Employers are also interested in collaborating on training to make it more accessible locally at a lower cost, particularly in LEAN Manufacturing
- Employers suggested making co-ops mandatory

Positions Employers are having difficulty finding filling

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

- Skills Gaps Employers are facing
  - Leadership, Communication, Continuous Learning mindset, Divers Licenses, Soft Skills, Digital Literacy (HTML)
  - People who can code or do programming and design websites etc. and people who are competent using a computer and using software related to their job.

3.4.3 Immigration Roundtables

Working in collaboration with Lethbridge Local Immigration Partnership (LIP) / Lethbridge Family Services, two roundtables were conducted via Zoom. The first session engaged immigrant-serving organizations and some local businesses to gather perspectives on immigrant integration to the workplace and into the community. The second session engaged new immigrants to the region. A total of 20 individuals participated in these sessions.

Session Themes Support Providers

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

Session Themes Immigrants

- Newcomers are facing barriers in getting jobs and integrating into Southwest Alberta, including:
  - ESL, getting the first job and recognized Canadian experience or references and recognition of skills as compared to credentials
- Supports Requested include:
  - Improved access to existing services, transition programming, career bridging, job shadowing and resume writing
- Participants would like to encourage employers to be more open to hiring immigrants and have more inclusive corporate cultures
- Continue to promote and make information more accessible to the immigrant community

4. Aligning Talent Supply and Demand

4.1 Local Labour Force

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

4.1.1 Renewable Energy

Based on retirements and economic activity, it is projected that the renewable energy sector will require a total of 42 new workers by 2025. Considering only the individuals graduating from post-secondary institutions in the Lethbridge Service Area, it is evident that if the graduate numbers trend continues, workers graduating just from Lethbridge College and the University of Lethbridge could meet the demand for workers in the top in-demand occupations in the renewable energy sector. However, it is recognized that graduates are mobile and may not remain in the community post-graduation. This suggests an opportunity to engage graduates further, and promote the assets of the region, as a means of retaining them upon graduation. However, there is likely to be a significant workforce considering transitioning to renewable energy from the depressed oil and gas sector. This workforce has the potential to reduce opportunities for new graduates, pushing them out of the region in search of work.

Figure 24: Labour Force Demand – Renewable Energy

NOC	2025 Projection Demand	Skill Level[3]
Total (All NOC in Renewable Energy)	42	N/A
7244 Electrical power line and cable workers	3	B
2133 Electrical and electronics engineers	3	A
9241 Power engineers and power systems operators	3	B
0912 Utilities managers	2	A
1111 Financial auditors and accountants	1	A
7243 Power system electricians	1	B
1221 Administrative officers	1	B
7511 Transport truck drivers	1	C
6552 Other customer and information services representatives	1	C
2171 Information systems analysts and consultants	1	A

Source: metroeconomics | LERS Cubes | Alberta Open Data

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

4.1.2 Agricultural Manufacturing

The agricultural manufacturing sector will decline by a total of 6 workers by 2025; in fact, only six of the business subsectors will experience growth in the next five years. Considering only the unique individuals graduating from post-secondary institutions in the Lethbridge Service Area, and individuals enrolling in grade 12 in local high schools. It is evident that if the graduate numbers trend continues, the pipeline of workers could meet the demand for workers in the top in-demand occupations in the agricultural manufacturing sector if retained in the region.

Figure 25: Labour Force Demand – Agricultural Manufacturing

NOC	2025 Projection Demand	Skill Level
Total (All NOC in Agriculture Manufacturing)	**-6**	**N/A**
6332 Bakers	4	B
6421 Retail salespersons	2	C
6411 Sales and account representatives - wholesale trade (non-technical)	1	C
7514 Delivery and courier service drivers	1	C
6711 Food counter attendants, kitchen helpers and related support occupations	1	D
1431 Accounting and related clerks	1	C

Source: metroeconomics | LERS Cubes | Alberta Open Data

4.1.3 Other Manufacturing

Other manufacturing will experience a minimal increase in the next five years. Metroeconomic's projections show the net increase would be only one person for the whole sector; this considers the industries that will increase, minus the industries that will experience declines.

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

Figure 26: Labour Force Demand – Other Manufacturing

NOC	2025 Projection Demand	Skill Level
Total (All NOC in Other Manufacturing)	**1**	**N/A**
7315 Aircraft mechanics and aircraft inspectors	4	B
7237 Welders and related machine operators	2	B
7233 Sheet metal workers	2	B
9537 Other products assemblers, finishers and inspectors	1	C
7272 Cabinetmakers	1	B
9416 Metalworking and forging machine operators	1	C
2244 Aircraft instrument, electrical and avionics mechanics, technicians and inspectors	1	B
7235 Structural metal and platework fabricators and fitters	1	B
0911 Manufacturing managers	1	A
9612 Labourers in metal fabrication	1	D

Source: metroeconomics | LERS Cubes | Alberta Open Data

Tourism

The tourism sector will require 614 new workers by 2025. Most of these workers will be needed in occupations such as food counter attendants, kitchen helpers and related support occupations; food and beverage servers; and cooks. Most of these occupations do not require formal education, with some exceptions. Thus, considering only the unique individuals graduating from post-secondary institutions in the Lethbridge Service Area, and individuals enrolling in grade 12 in local high schools. It is evident that if the graduate numbers trend continues, the pipeline of workers could meet the demand for workers in the top in-demand occupations in the tourism sector.

Figure 27: Labour Force Demand – Tourism

NOC	2025 Projection Demand	Skill Level
Total (All NOC in Tourism)	**614**	**N/A**
6711 Food counter attendants, kitchen helpers and related support occupations	132	D
6513 Food and beverage servers	95	C
6322 Cooks	76	B
0631 Restaurant and food service managers	60	A
6611 Cashiers	24	D
6311 Food service supervisors	24	B
6321 Chefs	21	B
5254 Program leaders and instructors in recreation, sport and fitness	18	B
6512 Bartenders	16	C
6511 Maîtres d'hôtel and hosts/hostesses	14	C

Source: metroeconomics | LERS Cubes | Alberta Open Data

4.1.4 Transportation, Logistics and Warehousing

The transportation, logistics and warehousing sector will require 262 new workers by 2025. Most of these workers will be needed in occupations such as transport truck drivers, material handlers, and retail and wholesale trade managers. Most of these occupations do not require formal education and can be filled with individuals with a high school diploma or less educational attainment.

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

Figure 28: Labour Force Demand – Transportation Logistics and Warehousing

NOC	2025 Projection Demand	Skill Level
Total (All NOC in Transportation, Logistics & Warehousing)	**262**	**N/A**
7511 Transport truck drivers	55	C
7452 Material handlers	17	C
0621 Retail and wholesale trade managers	11	A
7514 Delivery and courier service drivers	9	C
7513 Taxi and limousine drivers and chauffeurs	9	C
6411 Sales and account representatives - wholesale trade (non-technical)	8	C
1512 Letter carriers	8	C
7512 Bus drivers, subway operators and other transit operators	7	C
1521 Shippers and receivers	7	C
1511 Mail, postal and related workers	6	C

Source: metroeconomics | LERS Cubes | Alberta Open Data

4.1.5 Agriculture

The agriculture sector will require 47 new workers by 2025. Most of these workers will be needed in occupations such as retail and wholesale trade managers, managers in agriculture, and sales and account representatives -wholesale trade (non-technical). Although the top two occupations are managerial occupations, the rest of the top ten occupations are mostly skill level C "occupations usually require secondary school and occupation-specific training."

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

Figure 29: Labour Force Demand – Agriculture

NOC	2025 Projection Demand	Skill Level
Total (All NOC in Agriculture)	**47**	**N/A**
0621 Retail and wholesale trade managers	4	A
0821 Managers in agriculture	4	A
6411 Sales and account representatives - wholesale trade (non-technical)	3	C
7452 Material handlers	3	C
8431 General farm workers	3	C
6421 Retail salespersons	2	C
7312 Heavy-duty equipment mechanics	2	B
7511 Transport truck drivers	1	C
1521 Shippers and receivers	1	C
9617 Labourers in food and beverage processing	1	D

Source: metroeconomics | LERS Cubes | Alberta Open Data

4.1.6 Healthcare and Social Assistance

The healthcare and social assistance sector will require 1,041 new workers by 2025. This sector will experience the most significant employment growth among all the key industries in the City of Lethbridge. Most of this growth will take place in occupations such as registered nurses and registered psychiatric nurses, nurse aides, orderlies and patient services associates, and social and community services workers.

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

Figure 30: Labour Force Demand – Healthcare and Social Assistance

NOC	2025 Projection Demand	Skill Level
Total (All NOC in Healthcare & Social Assistance)	**1,041**	**N/A**
3012 Registered nurses and registered psychiatric nurses	147	A
3413 Nurse aides, orderlies and patient service associates	106	C
4212 Social and community service workers	53	B
1414 Receptionists	44	C
4214 Early childhood educators and assistants	38	B
3233 Licensed practical nurses	34	B
1411 General office support workers	32	C
4411 Home child care providers	31	C
3112 General practitioners and family physicians	30	A
3411 Dental assistants	26	C

Source: metroeconomics | LERS Cubes | Alberta Open Data

4.2 Regional Skills Gap Analysis

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

Figure 31: Identified Workforce Challenges: General / Soft Skills

General / Soft Skills					
Challenge Area	**Engagement**	**Common Skills Matrix***	**Trends**	**Vicinity Data**	**Points****
Ability to Learn	Business Survey, Interviews, Workshops	Yes	Yes	Yes	9
Interpersonal Skills	Business Survey, Interviews, Workshops	Yes	Yes	Yes	9
Work Ethic	Business Survey, Interviews, Workshops	Yes	Yes	Yes	9
Computer Literacy	Business Survey, Workshops, Interviews	Yes	Yes	Yes	9
General Labour	Business Survey, Workshops, Interviews	Yes	Yes	Yes	9
Communications Skills	Business and Job Seeker Survey	Yes	Yes	Yes	8
Ability to communicate in English	Workshops, Business Survey	Yes	Yes	Yes	8
Time Management and Prioritization	Business Survey	Yes	Yes	Yes	7
Teamwork	Business Survey	N/A	Yes	Yes	5
Customer Service	Business Survey	Yes	N/A	Yes	4
Sales/Service Skills	Business Survey	Yes	N/A	Yes	4
Critical thinking and problem-solving skills	N/A	Yes	Yes	N/A	3

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

Figure 32: Identified Workforce Challenges: Specialized Skills

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

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

Figure 33: Identified Workforce Challenges: Technologies

Technologies					
Challenge Area	**Engagement**	**Common Skills Matrix***	**Trends**	**Vicinity Data**	**Total****
Technical Skills (Comfort using machinery)	Industry Sessions, Business Survey, Job Seeker Survey	Yes	Yes	Yes	9
Technical Skills (Comfort using machinery)	Industry Sessions, Business Survey, Job Seeker Survey	Yes	Yes	Yes	9
Microsoft Office Suite	N/A	Yes	Yes	Yes	6
Driver Licenses and Certification	Business Survey, Workshops, Interviews	Yes	Yes	N/A	6
Adobe Suite (Photoshop)	N/A	N/A	N/A	Yes	4
LEAN Manufacturing	Workshops, Business Survey, Interviews	N/A	Yes	N/A	4
Data and statistical analysis	Business Survey	Yes	N/A	N/A	3
Computer Programming	Business Survey	N/A	N/A	N/A	1
Robotics Expertise	Interviews	N/A	N/A	N/A	1

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

Figure 34: Identified Workforce Challenges: Tools and Equipment

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

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

5. Strategic Directions

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

Pillar 1: Labour Market Information

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

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

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

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

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

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

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

Pillar 2: Talent Retention

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

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

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

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

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

Pillar 3: Skills Alignment

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

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

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

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

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

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

Pillar 4: Talent Attraction

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

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

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

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

6. Moving from Strategy Development to Action

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

In the regional strategy, a series of thirteen objectives are offered as recommendations with tactical actions applied to support implementation and impact. Actions have been assigned a timeline that informs on which actions should move forward in the short (0-18 months), medium (2-3 years), and longer-term (3-5 years). Actions have also been identified as regional, local or both and assigned an estimated cost $ (0-$5,000), $$ ($5,000 -$10,000 and $$$ ($10,000+). Again, it is important to take into consideration changes in the economy and the region, as this may shift timelines for implementation.

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

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

6.1 Critical Path Action Plan

The Southwest Alberta Skills Study Partnership includes communities and educational institutions within the Study Area with differing levels of resources and capacity. Recognizing these differences has led to the development of critical path action plans specific to each partner community. The following action plan represents the objectives and actions for the city of Lethbridge. There is an opportunity for the city to work collaboratively with other communities or as part of the regional Study Area to maximize efforts and outcomes.

Pillar 1: Labour Market Information

		Priority Timing			Cost	Scale
Objective #1	**Develop a Comprehensive, Central and Current Labour Market Information System**	**S**	**M**	**L**	**$**	**L&R**
Action #1	Support the development of or contribute to a regional/community business database to support future business outreach and engagement. (Business database developed through this initiative will be shared as a starting point).	✓			**$$**	**L&R**
Objective #2	**Disseminate Relevant LMI to Inform Decisions and Promote Opportunity**	**S**	**M**	**L**	**$**	**L&R**
Action #2	Develop/Share New and Existing training resource guides for job seekers and students that showcase career pathways to high demand occupations and local training options and micro-credentialing that support necessary skills and knowledge development and credentials. The guide should clearly outline the career paths, educational requirements, local training options, and available resources, assistance, and potential grants.		✓		**$$**	**L&R**

Pillar 2: Talent Retention

		Priority Timing			Cost	Scale
Objective #3	**Foster Work Integrated Learning**	**S**	**M**	**L**	**$**	**L&R**
Action #3	Continue to engage local business associations and local businesses to promote and encourage experiential work term opportunities (internships, co-ops, apprenticeships) to increase participation and career awareness for local secondary and post-secondary students.	✓			**$**	**L&R**
Objective #4	**Create In-depth Awareness of Local Careers**	**S**	**M**	**L**	**$**	**L&R**
Action #4	Host "familiarization tours" with local businesses that are experiencing growth to expose faculty members, career counsellors, and administration from local educational institutions to local workplaces. These tours should be tailored to educators and foster education – business relations. This strengthens educators understanding of how workplaces have changed over time and promotes economic sectors in the region.		✓		**$**	**L**

Objective #5	Retain Graduates	Priority Timing			Cost	Scale
		S	M	L	$	L&R
Action #5	Promote mentorship programming for businesses and educational institutions to foster graduate connections within the community and within a sector or local business. This further supports knowledge exchange, career exploration, and skills development.	✓			$	L&R

Objective #6	Support Business Talent Retention Efforts	Priority Timing			Cost	Scale
		S	M	L	$	L&R
Action #6	Continue to work with businesses to promote existing provincial and federal COVID-19 recovery initiatives to rehire workers.	✓			$	L&R

Pillar 3: Skills Alignment

Objective #7	Support Career Development and Upskilling	Priority Timing			Cost	Scale
		S	M	L	$	L&R
Action #7	Support the development of deeper alignment between local school boards, colleges, and universities and employers, ensuring students, graduates, and teachers understand career paths and required skills. Consider the formation of a Talent Supply Table to foster regular discussions and information sharing.		✓		$	L&R

Objective #8	Support the Integration of the Immigrant Workforce	Priority Timing			Cost	Scale
		S	M	L	$	L&R
Action #8	Connect businesses with immigrant services providers and support the development of transitional employment programming for new immigrants that include ESL and cultural training.	✓			$	L
Objective #9	Support the Development of Indigenous Talent					

		Priority Timing			Cost	Scale
		S	M	L	$	L&R
Action #9	Work with Indigenous Governments and Economic Development Agencies to share LMI data and opportunities.	✓			$$	L&R

Pillar 4: Talent Attraction

Objective #10	**Promote Welcoming Communities**	Priority Timing			Cost	Scale
		S	M	L	$	L&R
Action #10	Continue economic development efforts on diversifying and growing the economy (e.g., renewable sector) to grow the overall number of jobs in the region. Focus on areas that create long-term, meaningful employment opportunities.		✓		$	L&R
Action #11	Create a targeted marketing campaign encouraging skilled workers to relocate to the region. Provide materials and support to businesses that are recruiting talent.		✓		$$	L&R
Action #12	Continue to work with local employers and employees who recently moved to the region and have been successful and promote their positive experiences via online and offline channels.		✓		$	L
Objective #11	**Foster Business Culture, Inclusiveness and Diversity**	Priority Timing			Cost	Scale
		S	M	L	$	L&R
Action #13	Encourage businesses to promote corporate culture as a company benefit and a key consideration for potential employees. Focus on leveraging regional brand, local assets, employer perks, and workplace culture, incentives, and inclusive practices. This may be in the form of an employer guide, webpage, or a publication that depicts the return on investment.	✓			$	L&R
Action #14	Utilize on-line resources designed to guide stronger inclusiveness[6], and share with employers to foster the concept of a "welcoming and inclusive workplace culture" among businesses to promote diversity in the workplace.		✓		$$	L&R
Action #15	Consider creating a welcome package bundle for workers who relocate to the region for work. This package could include discounts for local services (e.g., community gyms, pools, etc.), local deals from businesses, and more. Collaboration with the business community to develop appropriate incentives is advised. Investigate creating a promotion campaign highlighting the package and sense of community across the region.	✓			$	L&R

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

Tools and Projects Active in the Region

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

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

6.2 Local Assets Inventory

A lifestyle asset inventory in the City of Lethbridge identified 392 health care amenities, 136 education institutions, 123 social services, 133 cultural and recreational assets, and 134 environmental assets. The number of each of these asset categories indicates that the region offers a variety of services and opportunities for residents of Lethbridge; this characteristic might support broader business attraction and retention efforts. When considering the influencing factors that are top of mind for those seeking to relocate for career considerations, the opportunities must be known. Beyond job opportunities, more attention is now given to understanding the influencing factors of quality of life, including affordable housing, transportation and walkability, tourism and cultural assets, post-secondary and life-long learning accessibility, health care, school, social and sports programming for children. The Study Area has a wide variety of lifestyle assets that present a significant opportunity to showcase the value proposition of the region as a component of the talent attraction and retention effort.

For further detail, see complete Asset Inventory – City of Lethbridge.

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

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

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

7. Conclusion

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

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

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

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