FORT McMURRAY WOOD BUFFALO

Regional Labour Market Needs Assessment

October 2024

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This Regional Labour Market Needs Assessment is being developed as part of the Regional Municipality of Wood Buffalo **Regional Workforce Development Strategy.** This Strategy is led by the Fort McMurray Wood Buffalo Economic Development & Tourism Department.

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Executive Summary

This Regional Labour Market Needs Assessment is part of the Regional Municipality (RM) of Wood Buffalo's Regional Workforce Development Strategy. This document is created as an informative piece completed in the fall of 2024. The data presented herein does not prescribe solutions or suggest that previous decisions were correct or incorrect. The information presented herein is designed to provide an introductory analysis of the current state of the Regional Municipality and inform future action planning.

This Labour Market Needs Assessment seeks to fully quantify the labour force and generate an understanding of the labour market conditions faced by businesses, job seekers, and employees in the Regional Municipality. More specifically, information was gathered on current and prospective gaps and opportunities related to the demand for skills, training programs, and crucial resources for workforce development. Crucial resources for workforce development include housing, transportation, childcare, healthcare services, career development opportunities, access to broadband, and access to technology, etc.

The first half of this report (Sections 1 and 2) presents quantitative data gathered from secondary sources (Statistics Canada, Lightcast Analyst, IBIS World, and Manifold Data Mining) with a focus on the broader population of the RM (Section 1) and then a specific Indigenous focus (Section 2). Related to labour demand, these sections:

- Compile and assess existing population and labour market data to understand the labour force demand, characteristics, skills, and knowledge supply locally.
- Measure job vacancies in the Economic Region to understand trends in unmet demand by occupation and relative to Alberta.
- Map labour skills supply by looking at residents' levels of education and major fields of study compared to Alberta.
- Identify labour force activity and employment status to understand which population groups are underemployed, underutilized, or lack representation in certain types of employment.

With respect to the demographic breakdown of the Regional Municipality it further:

- Assesses the people (socio-demographics) that make up the Regional Municipality to provide a snapshot of the local population and highlight potential future opportunities.
- Analyzes housing and income levels locally, to present a snapshot of the RM's current "livability".

Finally, to provide a broader review of the regional economy based on local industry impacts, this data assessment includes:

- Industry output analysis to identify key industries and jobs that can be leveraged to support future community goals and aspiration, and match them up with current, and emerging, community and economic drivers.

The data presented in the first half of this report does not tell the entire story of the RM – local context and realities matter. However, it provides a birds-eye view analysis of what jobs and occupations, businesses and industries impact the Municipality and where some growth opportunities may exist.

The second half of the report pivots to an analysis of primary data; Section 3 focuses on qualitative assessments distilled from conversations across an online survey, telephone interviews, and in-person focus groups with over 200 total participants. A SCOAR analysis was completed, presenting strengths, challenges, opportunities, assessments, and results based on our qualitative efforts. Next, core topics from the online survey are presented with a key focus on labour force dynamics from the perspective of both job seekers/employees and employers. Finally, four workforce development themes are presented, which will form the basis of the discussions that will take place at the Regional Labour Market Strategic Working Session, November 5th, in Fort McMurray.

1. Analysis of Secondary Data

1.1 Labour Demand

This subsection illustrates the number and size of employers by industry in the Regional Municipality. The data in this section comes from Statistics Canada's Canadian Business Patterns dataset. Employers in this dataset include businesses in the Business Register, which are all Canadian businesses that meet at least one of the three following criteria:

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

Statistics Canada divides businesses into two major groupings:

1. Businesses with a determinate number of employees.
2. Businesses with an indeterminate number of employees.

Businesses without employees correspond to the "indeterminate" employment category. For economic development purposes, businesses with a determinate number of employees (one or more) are of greater interest than indeterminate businesses (which frequently have low levels of economic activity or are uninterested in expanding operations).

According to the Canadian Business Registry, The Regional Municipality had 5,305 businesses as of December 2021[1], of which 1,956 (36.9%) had employees. Of these 1,956 businesses with employees, the majority had between one and nine employees (1,312, or 67.1%). Comparatively, 16 businesses (4.45%) had over 100 employers.

Table 1 highlights the difference in sectoral dominance, by number of **businesses with employees** in the Regional Municipality. In Wood Buffalo, *other services*[2], *construction,* and *retail trade* sectors see the largest percentage of businesses with employees, each with 12.3% representation.

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[1] Due to data accrual methods, December 2021 is the most recently available data for this dataset.

[2] Other services (except public administration) comprises establishments that do not fit within other sectors. It includes a host of niche services. For a complete list of businesses and industry definitions, see the Statistics Canada website here.

Table 1: Distribution of Businesses in the Regional Municipality of Wood Buffalo – 2021

Sector	RM of Wood Buffalo
Other services (except public administration)	12.3%
Construction	12.3%
Retail trade	12.3%
Unclassified	10.2%
Health care and social assistance	8.3%
Professional, scientific and technical services	8.3%
Accommodation and food services	6.5%
Wholesale trade	5.7%
Real estate and rental and leasing	4.9%
Transportation and warehousing	4.8%
Administrative and support, waste management and remediation services	4.3%
Mining, quarrying, and oil and gas extraction	2.1%
Finance and insurance	2.0%
Arts, entertainment and recreation	1.5%
Manufacturing	1.2%
Educational services	1.0%
Information and cultural industries	0.9%
Public administration	0.6%
Management of companies and enterprises	0.3%
Utilities	0.3%
Agriculture, forestry, fishing and hunting	0.1%

Source: Lightcast 2024.Q1 based on Statistics Canada, Canada Business Registry, December 2021.

Statistics Canada Business Registry data between 2016 and 2021 helps determine how businesses have evolved recently. Table 2 highlights the growing and declining sectors (by 2-digit NAICS) by the change in businesses in the RM. The economy has seen significant growth in most large sectors, with only *health care and social assistance and accommodation and food* services seeing decreases, among those with at least 100 businesses in 2021.

Table 2: Change in No. of Businesses in the Regional Municipality – 2016 to 2021

Sector	No. of Businesses in 2021	Change in No. of Businesses 2016-2021	% Change in No. of Businesses 2016-2021
Other services (except public administration)	241	25	10%
Retail trade	240	20	8%
Construction	240	4	2%
Unclassified	200	18	9%
Health care and social assistance	163	-29	-18%
Professional, scientific and technical services	162	11	7%
Accommodation and food services	127	-7	-6%
Wholesale trade	111	2	2%
Real estate and rental and leasing	96	-9	-9%
Transportation and warehousing	94	-8	-9%
Administrative and support, waste management and remediation services	85	6	7%
Mining, quarrying, and oil and gas extraction	42	-6	-14%
Finance and insurance	40	-7	-18%
Arts, entertainment and recreation	30	-4	-13%
Manufacturing	23	-5	-22%
Educational services	19	0	0%
Information and cultural industries	18	3	17%
Public administration	11	0	0%
Utilities	5	0	0%
Agriculture, forestry, fishing and hunting	3	0	0%

Source: Lightcast 2024.Q1 based on Statistics Canada, Canada Business Registry, December 2016 to 2021. Note that the numbers in red indicate negative figures.

1.1.1 Potential for Local Entrepreneurship

Entrepreneurship can be broadly defined to include self-employed workers (i.e. commission salespersons or professionals running unincorporated firms such as doctors and lawyers) and incorporated self-employment[3]. Here we review two proxies for both of these types of entrepreneurship in the Region. First, we again look to Canada's Business Registry to examine any businesses with an "indeterminate" level of employees. This captures owner-operated businesses that either had earning less than thirty thousand dollars annually or owner-operated businesses that are incorporated. These small, owner-operated businesses are an important part of the local economy, as they accounted for 3,349 businesses, or 63.1% of the 5,305 businesses operating in the municipality in 2021. This was a net increase of 212 businesses (4.2% growth) since 2016.

In terms of businesses without employees, the largest sectors at a 2-digit NAICS level are found within:

- Real estate and rental and leasing (1,211 businesses without employees).
- Construction (320)
- Professional, scientific and technical services (268)
- Transportation and warehousing (234)
- Other services (except public administration) (230)

The real estate and rental and leasing is typically heavily represented within this category of incorporated self-employment because individual real estate agents, individuals renting a second home, or people with short-term rental properties all fall under this category. While this information is helpful, many of these individuals are not running "businesses" in the traditional sense but often more geared towards earning passive income. To overcome this limitation, we can use another method.

[3]Statistics Canada. "The Entry into and Exit out of Self-employment and Business Ownership in Canada" Analytical Studies Branch Research Paper Series. July 2018.

As a second proxy, self-employed workers were estimated by Manifold SuperDemographics, and as can be seen in Table 6. The Regional Municipality has significantly lower levels in this type of entrepreneurship compared to the province. That is, while the province of Alberta sees 15% of residents in the labour force acting as self-employed individuals, in Wood Buffalo this figure is only 6%.

Table 3: Labour Force Aged 15 Years and Over By Class Of Worker

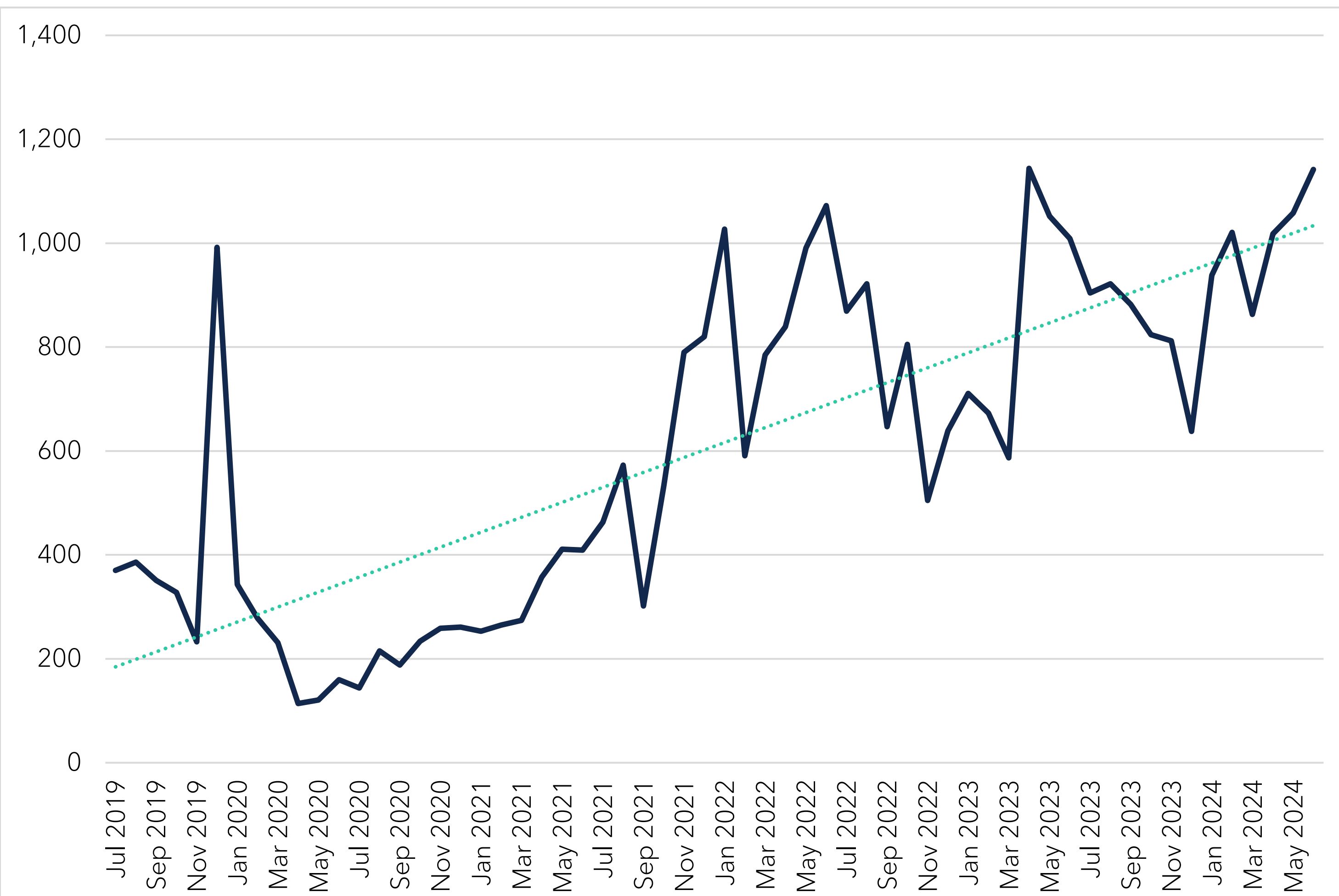
Variable Description	Regional Municipality of Wood Buffalo			Alberta		
	Total	Male	Female	Total	Male	Female
Total labour force aged 15 years and over	100%	100%	100%	100%	100%	100%
Class of worker - Not applicable	2%	1%	3%	3%	3%	3%
All classes of worker	98%	99%	97%	97%	97%	97%
Employee	92%	93%	91%	82%	80%	85%
Self-employed	6%	5%	7%	15%	18%	12%

Source: Manifold SuperDemographics 2024.

1.1.2 Job Posting Analytics

While many employers still rely on word of mouth to fill positions, there has been an increase in online job postings in the Regional Municipality since 2019 (see Figure 1). Outside of a few spike months (with unclear reasons, such as December of 2019), a clear trend has emerged (dotted line, Figure 1) of increased job postings in Fort McMurray. This can also be seen by looking at average unique monthly job postings for each of the four full year datasets (2020-2023). In 2020 there were an average of 212 postings per month; in 2021 that figure was 454, an increase of 114% year-over-year. In 2022 this increased a further 78% to 808 postings, with another 5% increase in 2023 to 847 job postings. Clearly, businesses are increasing their efforts in online recruitment.

Figure 1: Total number of Unique Job Postings in the Region, July 2019 to June 2024



Source: Lightcast 2024.Q1

According to Lightcast Analyst, there were 36,547 unique job postings for Wood Buffalo between July 2019 and July 2024. A unique job posting is the total number of job advertisements listed by different companies on career sites and job boards after removing duplicates. There were 89,014 total job postings, a posting intensity of 2.4-to-1, meaning that for every 2.4 postings there was 1 unique job posting.

The unique job postings data was first analyzed to understand where the strongest demand for labour is coming from by industry and occupation. This was done by looking at the total number of unique jobs posted.

Job posting analytics suggest that the strongest labour demand in the Municipality between July 2019 and July 2024 fell within the following industries:

1. Crude Petroleum Extraction (8% of total job posts)
2. Engineering Services (4%)
3. Employment Placement Agencies (4%)
4. Temporary Help Services (3%)
5. Industrial Building Construction (3%)
6. Investigation Services (2%)
7. Limited-Service Restaurants (2%)
8. Commercial Banking (2%)
9. Home Health Care Services (2%)
10. Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance (2%)

Job posting analytics for jobs advertised to residents in the area over the past year show that the top posted occupations in the area were:

1. Retail salespersons and visual merchandisers (3%)
2. Transport truck drivers (3%)
3. Home child care providers (3%)
4. Sales and account representatives - wholesale trade (non-technical) (3%)
5. Occupational health and safety specialists (3%)
6. Food service supervisors (3%)
7. Cooks (2%)
8. Security guards and related security service occupations (2%)
9. Material handlers (2%)
10. Contractors and supervisors, mechanic trades (2%)

Lightcast's job posting analytics software distinguishes between specialized skills, common (soft) skills, and qualifications. Specialized skills are specific, learnable, measurable, often industry-specific, or occupation-specific abilities related to a position (e.g. JavaScript, accounting). On the other hand, common skills are considered necessary across many industries and occupations (e.g. problem-solving, project management) and are generally related more to personal relations and people-management.

Qualifications and certifications are granted by a third-party entity (school, government, industry, etc.) and acknowledge a body of skills and abilities (e.g. MBA, Certified Registered Nurse). The following graphic illustrates, based on job posting analytics, the skills and qualifications with the highest demand in Wood Buffalo, over the past five years.

Top Qualifications

1. Valid Driver's License
2. First Aid and AED Certification
3. CPR Certification
4. Red Seal Certification
5. Security Clearance
6. Certified First Responder (CFR)
7. Registered Nurse (RN)
8. Security Guard License
9. Forklift Certification
10. Professional Engineer (PE) License

Top Common Skills

1. Communication
2. Operations
3. Customer Service
4. Management
5. English Language
6. Sales
7. Detail Oriented
8. Interpersonal Communications
9. Leadership
10. Planning

Top Hard Skills

1. Oil and Gass
2. Project Management
3. SAP Applications
4. Environment Health and Safety
5. Auditing
6. Construction
7. Safety Training
8. Food Services
9. Inventory Management
10. Hydrogen Sulfide (H2S) Training

1.1.3 Job Vacancies

This subsection explores unmet labour demand by looking at job vacancies over time calculated by Statistics Canada's Job Vacancies and Wage Survey. The data is collected by economic region (ER), which is a grouping created as a standard geographic unit for analysis. The ER is effectively the most localized unit for which Statistics Canada is collecting job vacancies data relevant to the Regional Municipality. Wood Buffalo is combined with Cold Lake for the purposes of the ER.

The Wood Buffalo-Cold Lake ER experienced higher-than-average rates of unmet labour demand in 2023, as can be seen by the average job vacancy rate calculated over the four quarters of 2023 and the first quarter of 2024. However, over the previous year (from Q1 2023 to Q1 2024) the job vacancy rate has fallen over 1.0%, from 5.1% to 4.0%, a positive indicator. This trend is similar to that experienced by other economic regions (though the trend is occurring more quickly locally compared to the provincial mark) and suggests that the provincial economy may be rebounding from post-pandemic lulls.

Table 4: Job Vacancy Rate by Quarterly Frequency, Alberta and its Regions - 2023

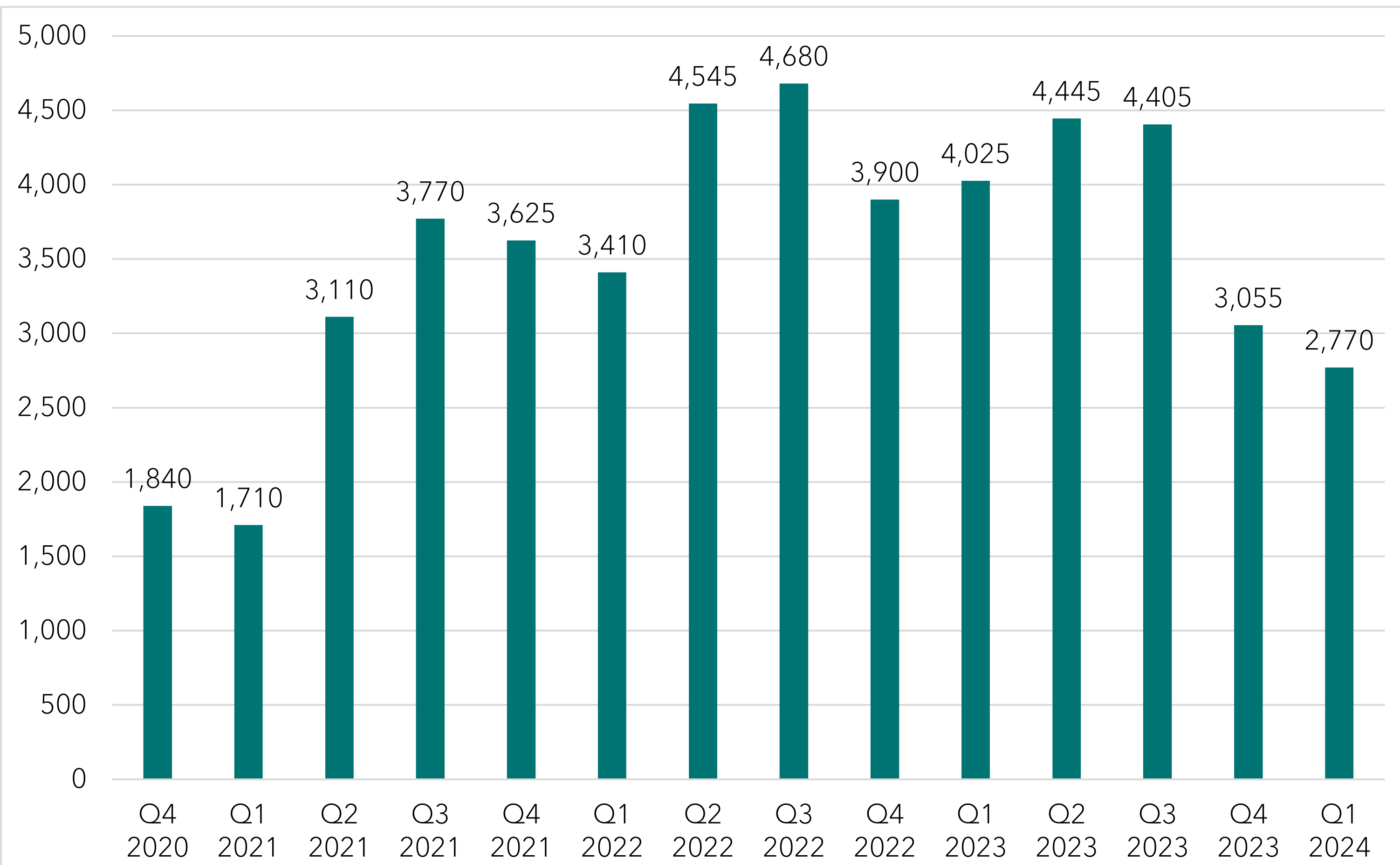
Alberta and its Regions	Q1 2023	Q2 2023	Q3 2023	Q4 2023	Q1 2024	Average Job Vacancy Rate
Alberta	4.4%	4.1%	4.0%	3.8%	3.6%	4.0%
Lethbridge-Medicine Hat	4.6%	4.4%	4.0%	3.4%	3.4%	4.0%
Camrose-Drumheller	4.9%	4.4%	4.5%	4.7%	4.2%	4.5%
Calgary	4.1%	3.7%	3.5%	3.4%	3.4%	3.6%
Banff-Jasper-Rocky Mountain House and Athabasca-Grande Prairie-Peace River	5.8%	5.6%	5.3%	5.0%	4.5%	5.2%
Red Deer	4.7%	3.9%	3.8%	3.5%	3.7%	3.9%
Edmonton	4.3%	4.2%	4.2%	3.9%	3.6%	4.0%
Wood Buffalo-Cold Lake	5.1%	4.6%	4.6%	4.1%	4.0%	4.5%

Source: Statistics Canada. Table 14-10-0398-Job vacancies, payroll employees, and job vacancy rate, by economic regions, quarterly, adjusted for seasonality. The job vacancy rate is the number of job vacancies expressed as a percentage of labour demand; that is, all occupied and vacant jobs.

The following page illustrates total job vacancies by major occupational grouping, (1-digit National Occupational Classification) for the Wood Buffalo-Cold Lake economic region, as calculated by Statistics Canada's Job Vacancy and Wage Survey. Some 1-digit occupation classifications are not included due to a lack of reliable data.

The figures below illustrate that, between the end of 2020 and mid 2023 job vacancies overall rose, but have begun to fall considerably since then. It is possible that this trend suggests businesses struggled mightily to find employees as the effects of the pandemic eased but have begun to have more success over the latter half of 2023 and first half of 2024. Over this time period, unmet labour demand grew most consistently for occupations in *occupations in education, law and social, community and government services*; *sales and services*; and *trades, transport, and equipment operators*. Specific occupation classification vacancies can be found in Appendix A.

Figure 2: Job Vacancies, All Occupations in Census Division 16



Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries

1.2 Labour Market Characteristics

Please note that this analysis is primarily based on population estimates by Manifold SuperDemographics for 2024, unless otherwise indicated. This section provides an assessment of Wood Buffalo from a socio-demographic standpoint; the people that make up the Regional Municipality. This analysis helps to provide a snapshot of the local population and highlight potential future opportunities.

1.2.1 Demographics

Table 5 illustrates population changes in Wood Buffalo from 2011 to 2034, compared to Alberta. After seeing explosive growth (with rates above 20%) from 2001 to 2011, the RM has seen more moderate growth rates of 9.2% and 1.0% from 2011 to 2021. Over the next decade, the rate of growth is projected to 8.2%, approaching 86,000 residents by 2034.

Wood Buffalo's population growth of a projected 4.2% over the next 5 years, is slightly less than the aggressive provincial mark of 6.9%. However, 4.2% growth is still considerable, and Wood Buffalo is in a unique position of having a very significant number of individuals engaging in work in the municipality while living all across Canada. As such, the local population figures do not fully encapsulate the talent pool available.

Table 5: Population Change, Wood Buffalo and Alberta, 2011-2034.

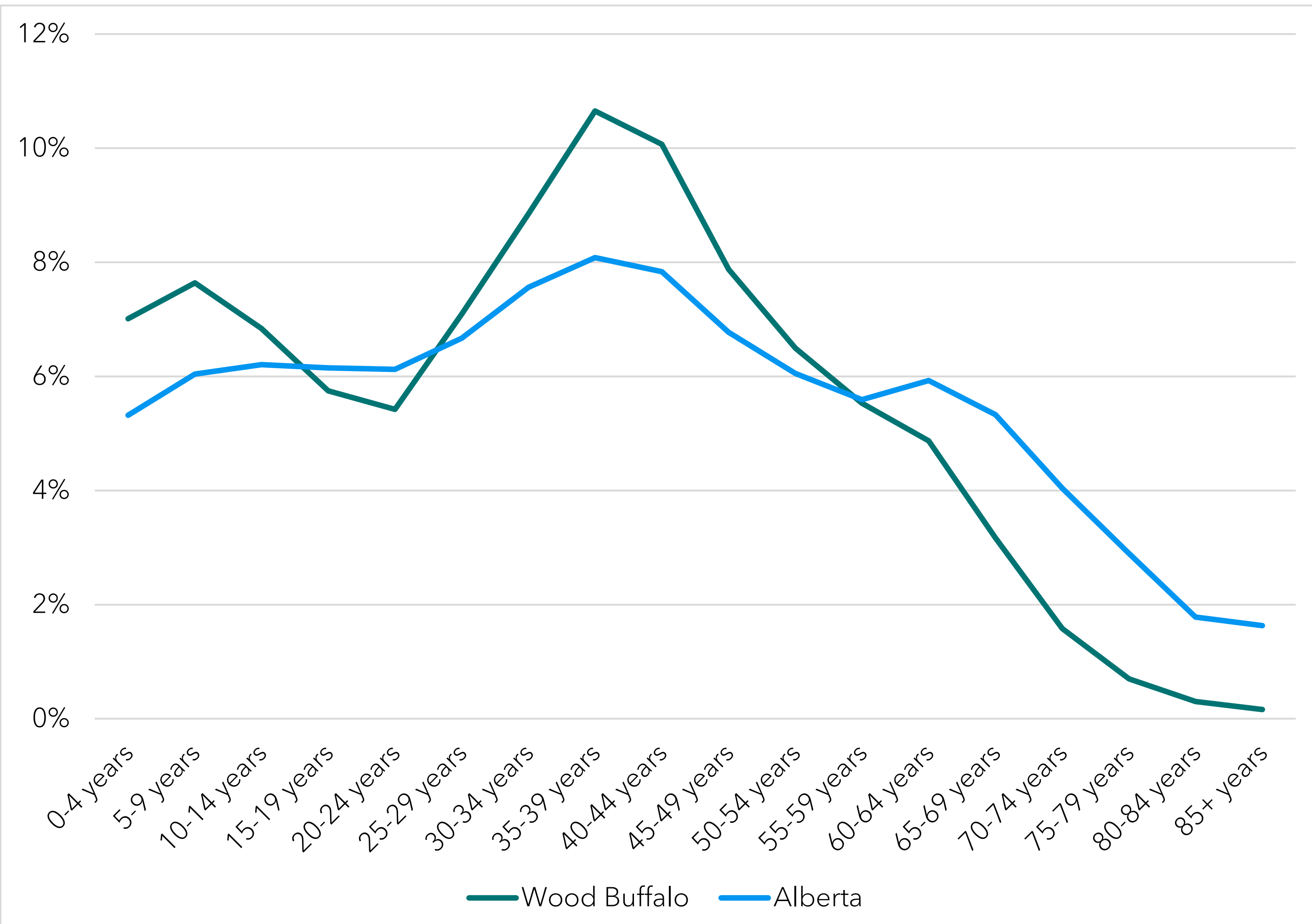
	2011	2016	2021	2024	2029	2034
Wood Buffalo	**65,565**	**71,594**	**72,326**	**79,478**	**82,840**	**85,988**
% Change	27.32%	9.20%	1.00%	n/c	4.23%	3.80%
Alberta Population Count	**3,645,257**	**4,057,175**	**4,262,635**	**4,790,474**	**5,121,975**	**5,439,537**
% Change	10.80%	11.60%	4.80%	n/c	6.92%	6.20%

Source: Statistics Canada Census Profiles 2011-2021; Manifold SuperDemographics 2024-2034.

Figure 3 contrasts the age profile of residents in Wood Buffalo and Alberta, in 2024. Wood Buffalo has a unique population distribution, in that it has a higher population of youth (under 19) and much higher representation among working aged individuals (ages 29 to 59), while having vastly fewer retirement-aged individuals (only 6% of residents are over 65, compared to 16% of Alberta residents).

The other trend worth noting is the lack of individuals aged 19 to 29, compared to the provincial mark. This is not at all surprising, as this age cohort tends to see higher representation in more urban centres, and those with large post-secondary institutions. While Fort McMurray is home to Keyano College, it is not large enough to greatly impact this cohort by itself.

Figure 3: Percent Population by Age, Wood Buffalo and Alberta, 2024.



Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2024.

The Regional Municipality has a younger age profile, compared to Alberta, due to its lack of retirement-aged individuals. That is, Wood Buffalo's average age of the population is 34.5, compared to 39.5 across the province. This is important for workforce development since these age ranges represent youth learning about labour opportunities, young families and young professionals, and established adults in the work force. Of particular note, young professionals (ages 25 to 40) benefit greatly from skills and career development opportunities beyond postsecondary programs. Overall, Wood Buffalo's working-age population (ages 15-64, 72.6%) is nearly 6% higher than Alberta's (66.8%).

Table 6: Wood Buffalo and Alberta Age Profile, 2024.

Age Group	Wood Buffalo	Alberta
0-14	21.5%	17.6%
15-64	72.6%	66.8%
65+	5.9%	15.7%

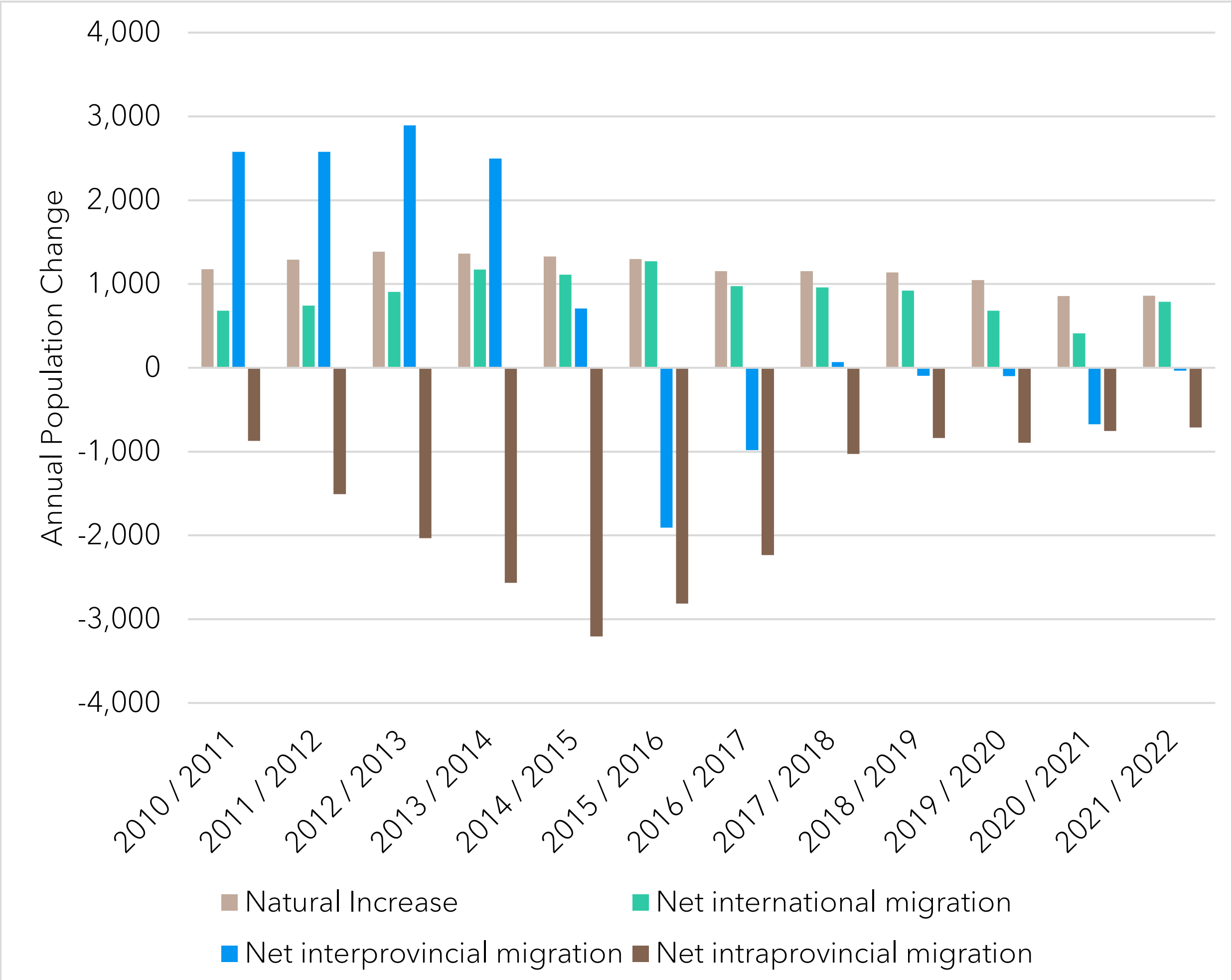
Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2024.

Figure 4 presents factors affecting population growth in Wood Buffalo from 2010 to 2022. The most consistent growth has come from natural population increases (births minus deaths), with an average increase to the population of 1,171 residents naturally. International migration has also seen steady rates of increase since 2010. International migration totals peaked from 2015-2016 with an increase in 1,271 net residents due to international migration (immigration minus emigration), and this cause has led to an average annual growth rate of 885 residents.

Net interprovincial migration (immigration from other provinces minus emigration to other provinces) has been positive more often than not (average net increase of 627 residents in Wood Buffalo) though there have been periods of stark decreases, as well (for example, 2015 to 2016 saw net losses of 1,909 residents due to interprovincial migration).

Finally, the largest source of population loss is due to net intraprovincial migration, or Wood Buffalo residents moving to other parts of Alberta. On average, this cause has led to a net decrease of 1,622 residents year-over-year, though this rate has slowed since 2017, with an average net loss of only 846 residents over that period.

Figure 4: Factors Affecting Population Growth in Wood Buffalo, Census Agglomeration, 2010-2022

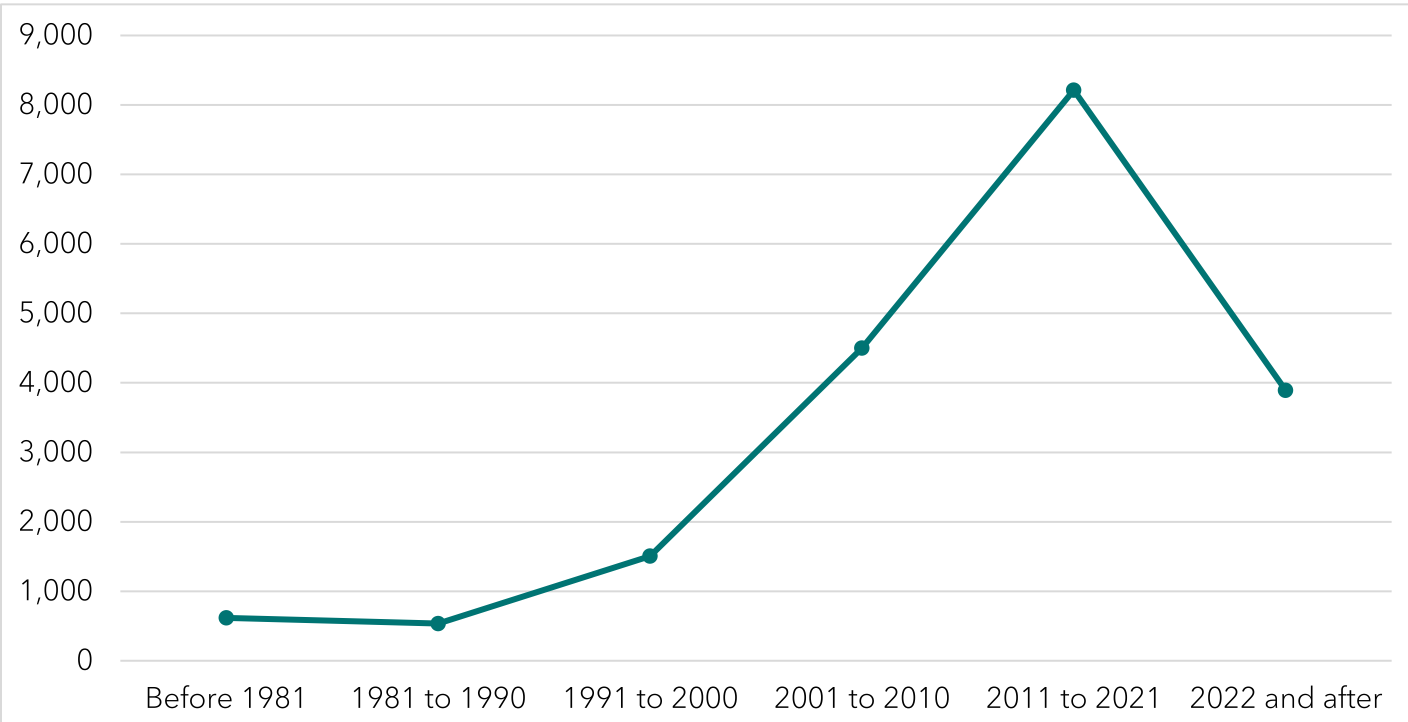


Source: Statistics Canada Table 17-10-0136-01 Components of population change by census agglomeration, 2021 boundaries

Figure 5 illustrates population estimates of total immigrants (includes persons who are, or who have ever been, landed immigrants or permanent residents) by census period in the Region, over the past 43 years. While remaining relatively low prior to 2000, the total international immigrant population has been steadily increasing in the new millennium. Although the below figure appears to show a decrease in the most recent data, please note that this is only because it is a much lesser reference period (two full years, rather than 10). As such, the final figure for this decade should be considerably higher than previous figures.

Immigrants to Wood Buffalo are most likely to come from Asia (with the Philippines and India each being the place of origin for over 600 immigrants), Africa (Nigeria, Ethiopia, and Morocco each are the place of origin for over 100 immigrants), and the Americas (Jamaica and Venezuela being the most common places of origin).

Figure 5: Total Immigrant Population in the Regional Municipality by Period of Immigration, 1981 to 2024



Source: Manifold SuperDemographics 2024

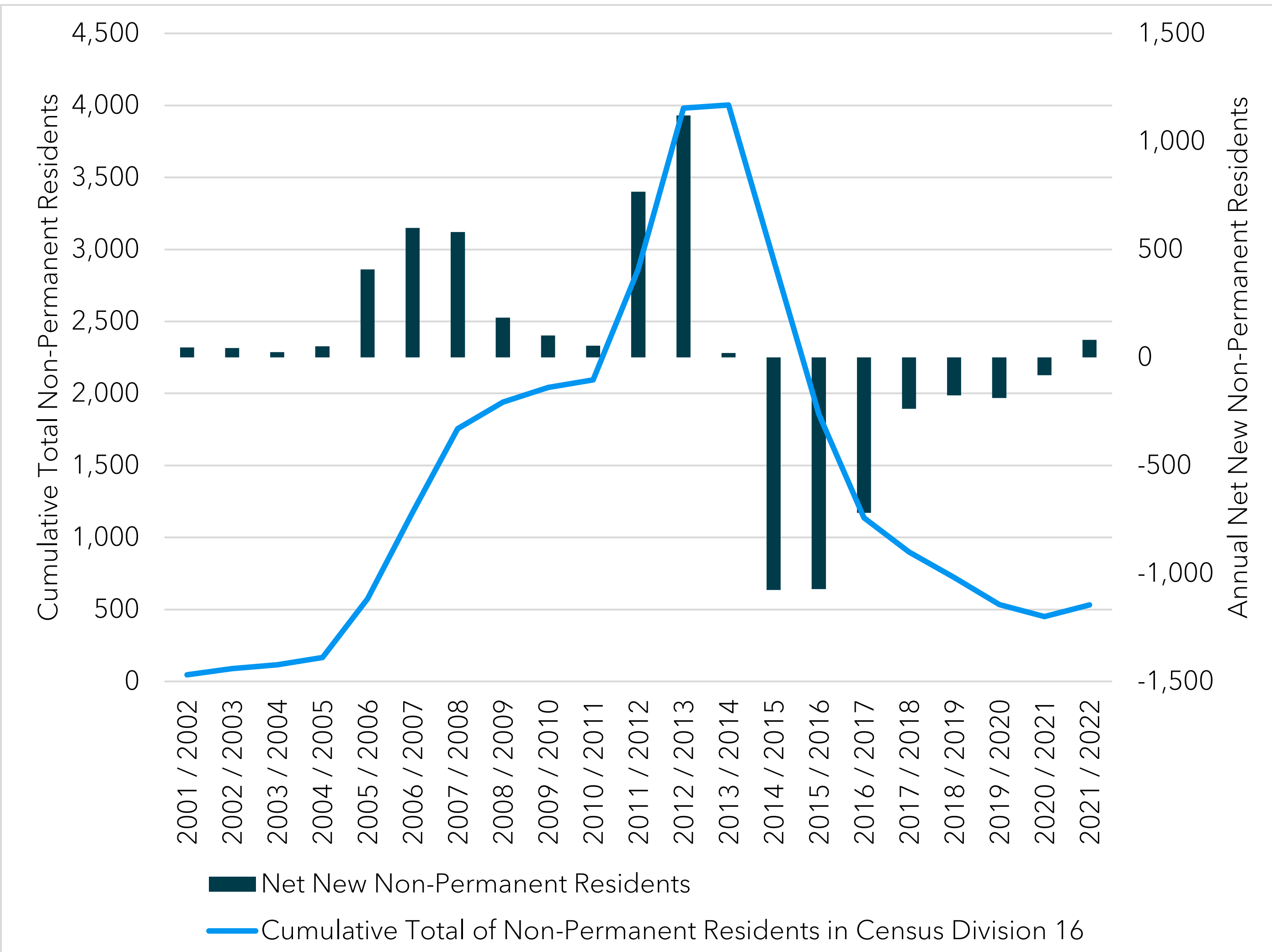
Like Canada and Alberta, the Regional Municipality relies on immigrants and non-permanent residents, particularly foreign temporary workers and foreign students, to fill jobs. The following table illustrates changes to net non-permanent residents[4], over the past 15 years, for Census Division 16, which incorporates Wood Buffalo and Improvement District Number 24.

Figure 6 shows that there were considerable increases in the number of non-permanent residents beginning in 2005 through 2013. However, beginning in 2014/2015 there was a large decline in the net number of non-permanent residents. According to the Canada West Foundation, as of 2014 "the TFWP (Temporary Foreign Worker Program) has new rules and processes that make bringing a foreign worker

[4]Non-permanent residents (NPRs) are persons who are in Canada on a temporary basis under the authority of a temporary resident permit, along with family members. NPRs include foreign workers, foreign students, and refugees.

into Canada more complicated".[5] The changes to the programs that came into effect place limits on low-wage temporary foreign workers (outside of agriculture workers and care givers) in order to incentivise employers to increase employment of Canadian citizens. This change led to stark decreases in the number of net non-permanent residents, with a decline from a high of approximately 4,000 in Census Division 16 to just over 500 by 2022.

Figure 6: Net non-permanent residents in Census Division 16



Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries.

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[5] Canadian West Foundation. "Work Interrupted". Mach 2015. Online: https://cwf.ca/wp-content/uploads/2015/10/CWF_HCP_TFWPWorkInterrupted_Report_MAR2015.pdf

1.2.2 Housing, Income, and Affordability

Households, income, and affordability are important subjects to consider when assessing labour market characteristics since diversity and affordability of housing are closely tied to the type of workforce a region can sustain. The Regional Municipality is in a unique position as there are a significant number of well-paying jobs propping up affordability metrics. While this is an enviable position to be in, it may also limit the ability to expand employment opportunities to service jobs that do not pay as highly as other sectors. This subsection begins with a profile of income cohorts, then presents affordability metrics, before discussing the availability of different dwelling types.

- In 2023, Wood Buffalo's median employment income was $96,350, nearly double (91%) higher than in Alberta ($50,378).
- In 2023, the average employment income for Wood Buffalo residents was $119,481, 72% higher than Alberta's ($69,602).

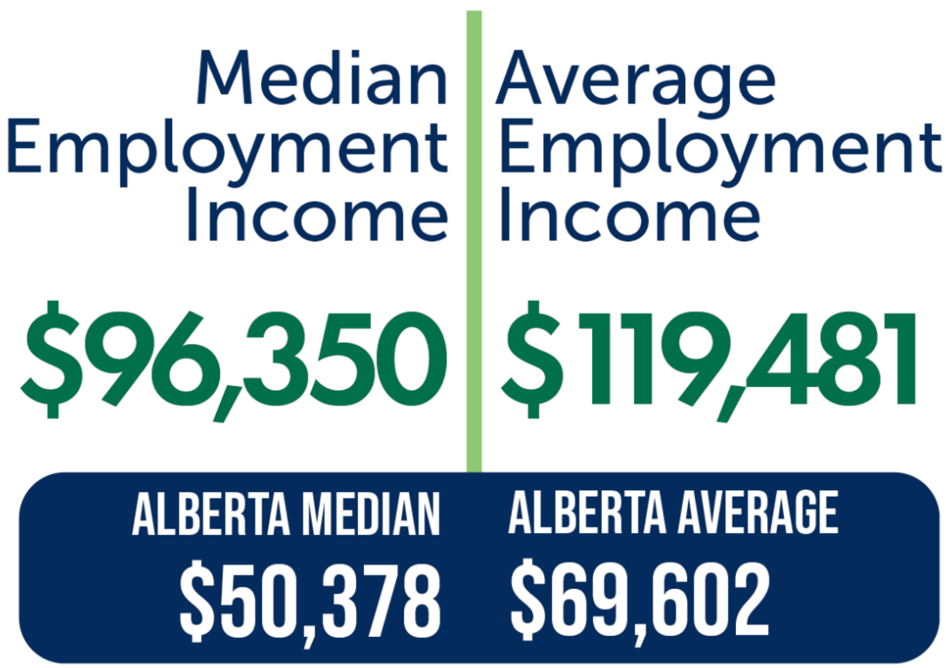
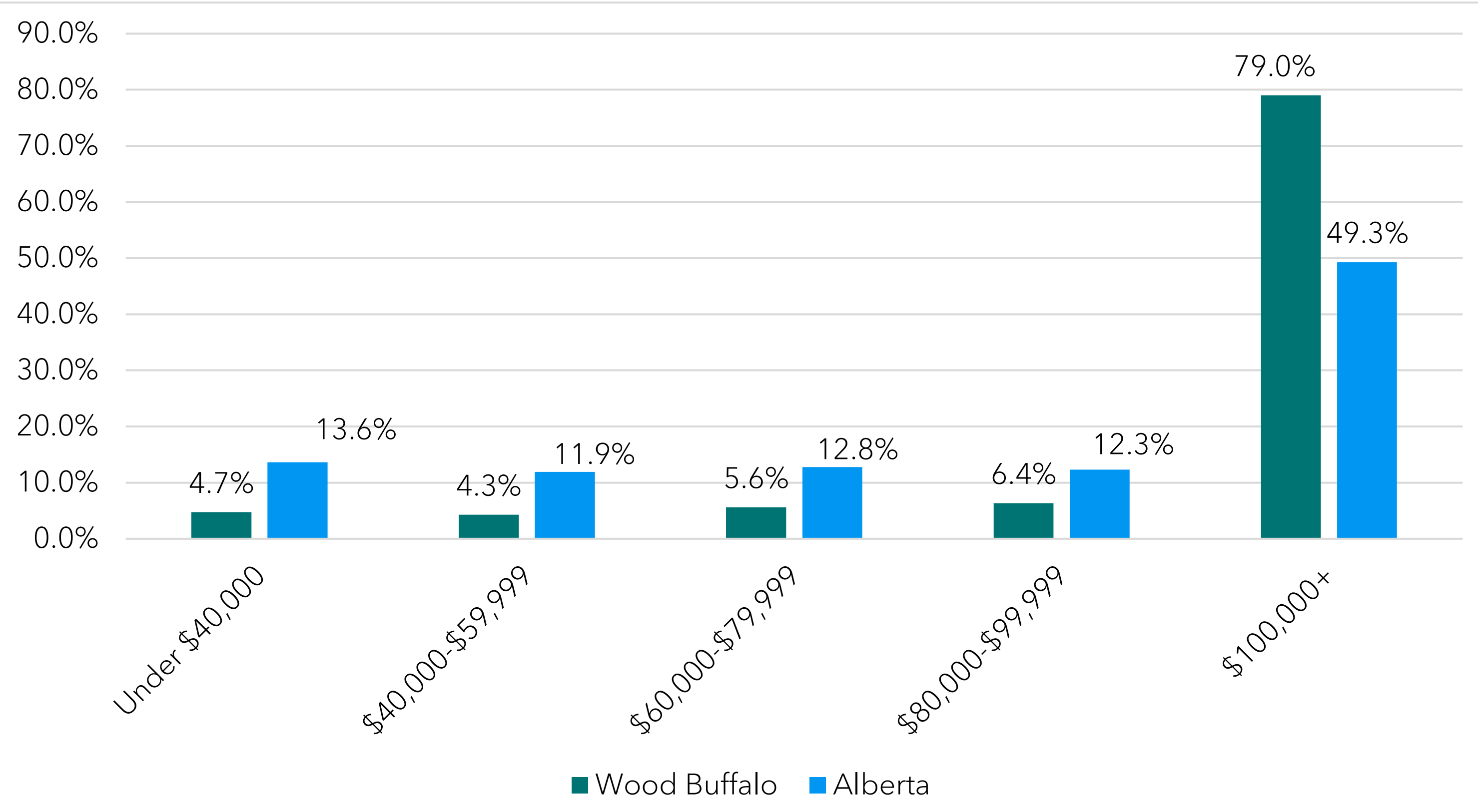


Figure 7 illustrates the distribution of household incomes. Approximately 79% of households in Wood Buffalo (4-in-5) earn above $100,000, compared to 49% in Alberta.

- Median household total income in Wood Buffalo: $230,460 vs. $107,953 in Alberta.
- Average household total income in Wood Buffalo: $241,127 vs. $137,719 in Alberta.

Figure 7: Household Income Levels by Percentage of the Population, 2023.



Source: Manifold Data Mining Inc. 2024 (2023 incomes).

Table 7 compares household affordability across the Regional Municipality to Alberta. Average dwelling values are fairly similar between Wood Buffalo and Alberta, with Wood Buffalo having a much higher median value. This disparity suggests that Wood Buffalo has fewer very expensive homes compared to Alberta as a whole, with a more level dwelling cost structure.

Shelter costs[6] for owned dwellings in the Regional Municipality are estimated to be nearly double those costs across the province, suggesting cost of living locally is considerable. However, as the monthly shelter costs for rented dwellings is comparable, there does appear to be more affordable options for those interested in renting, which speaks to the transient nature of much of the Wood Buffalo workforce. The percentage of households that spend 30% or more of total income on shelter is used in this study to assess affordability. Wood Buffalo residents are considerably less likely to be spending 30% or more of their household income on shelter costs, a positive indication that most residents of Wood Buffalo are able to afford their lifestyle.

Table 7: Household and Dwelling Attainability, Wood Buffalo and Alberta, 2024

Housing Characteristics	Wood Buffalo	Alberta
Total Number of Households	28,456	1,842,517
Average value of dwelling ($)	$499,190	$477,755
Median value of dwellings ($)	$520,147	$423,901
Median monthly shelter costs for owned dwellings	$3,237	$1,657
Average monthly shelter costs for owned dwellings	$3,061	$1,785
% of households owned	66%	70%
% of households rented	34%	29%
Median monthly shelter costs for rented dwellings ($)	$1,758	$1,368
Average monthly shelter costs for rented dwellings ($)	$1,870	$1,423
Average number of persons in private households	2.8	2.5
Population spending 30% or more of household total income on shelter costs	13%	21%

Source: Manifold SuperDemographics 2024

[6] Shelter costs for households include any mortgage payments, property taxes and condominium fees, along with the costs of electricity, heat, water and other municipal services.

Table 8 and Figure 8 speak to dwelling structures and adequacy in Wood Buffalo and Alberta. Rates of unsuitable size and dwellings in need of major repairs are fairly comparable between the RM and province. However, affordability is considerably greater for both owner and tenant households in Wood Buffalo, again suggesting that incomes locally are supporting a strong quality of life.

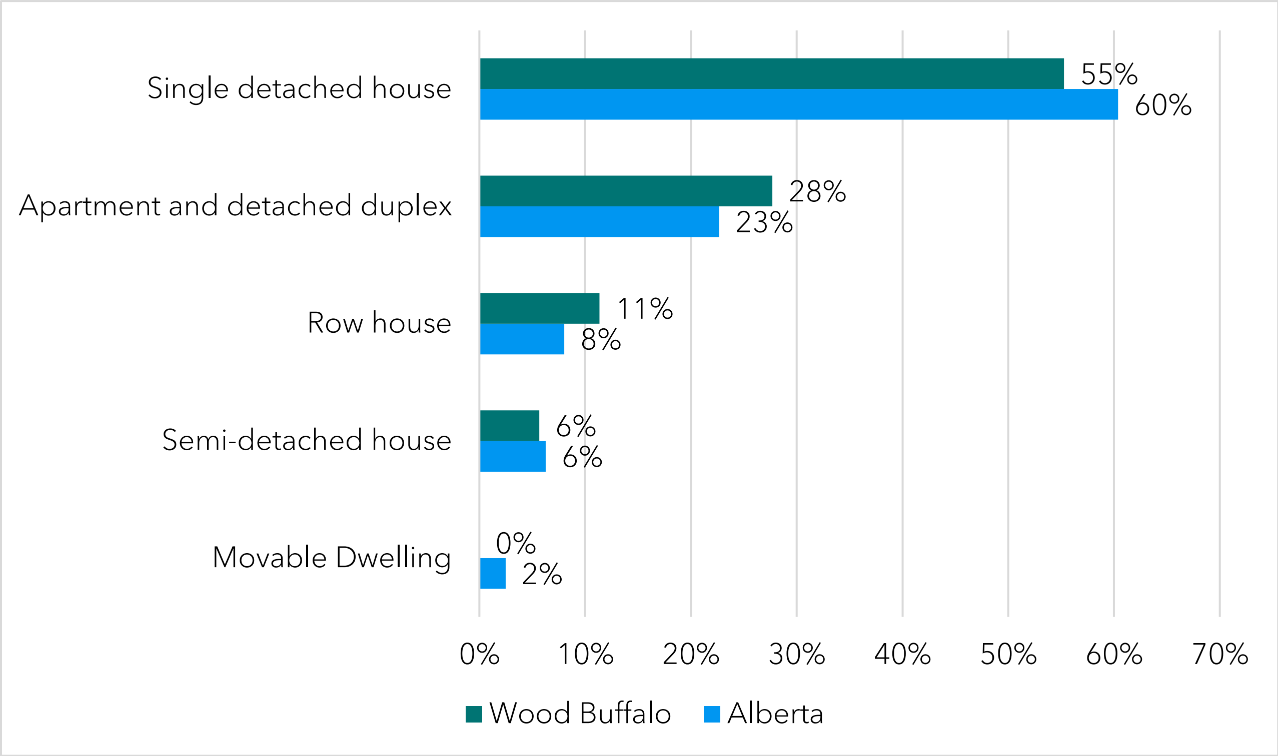
Table 8: Household Adequacy, Suitability, and Affordability - 2020

Description	Wood Buffalo	Alberta
Total number of occupied private dwellings	28,456	1,842,517
Major repairs needed	5.5%	5.4%
Size not suitable	6.3%	4.7%
% of owner households spending 30%+ of income on shelter costs	8.6%	14.9%
% of tenant households spending 30%+ of income on shelter costs	12.8%	30.4%

Source: Manifold SuperDemographics 2024

Regarding dwelling types, Wood Buffalo is well suited to providing housing to a variety of residents, with over a quarter of occupied dwellings being apartments (28% locally compared to 23% across Alberta). This is a positive statistic, as different dwelling offerings support different levels of socio-economic households and supports a diverse population.

Figure 8: Occupied Dwellings by Structure Type, 2023.

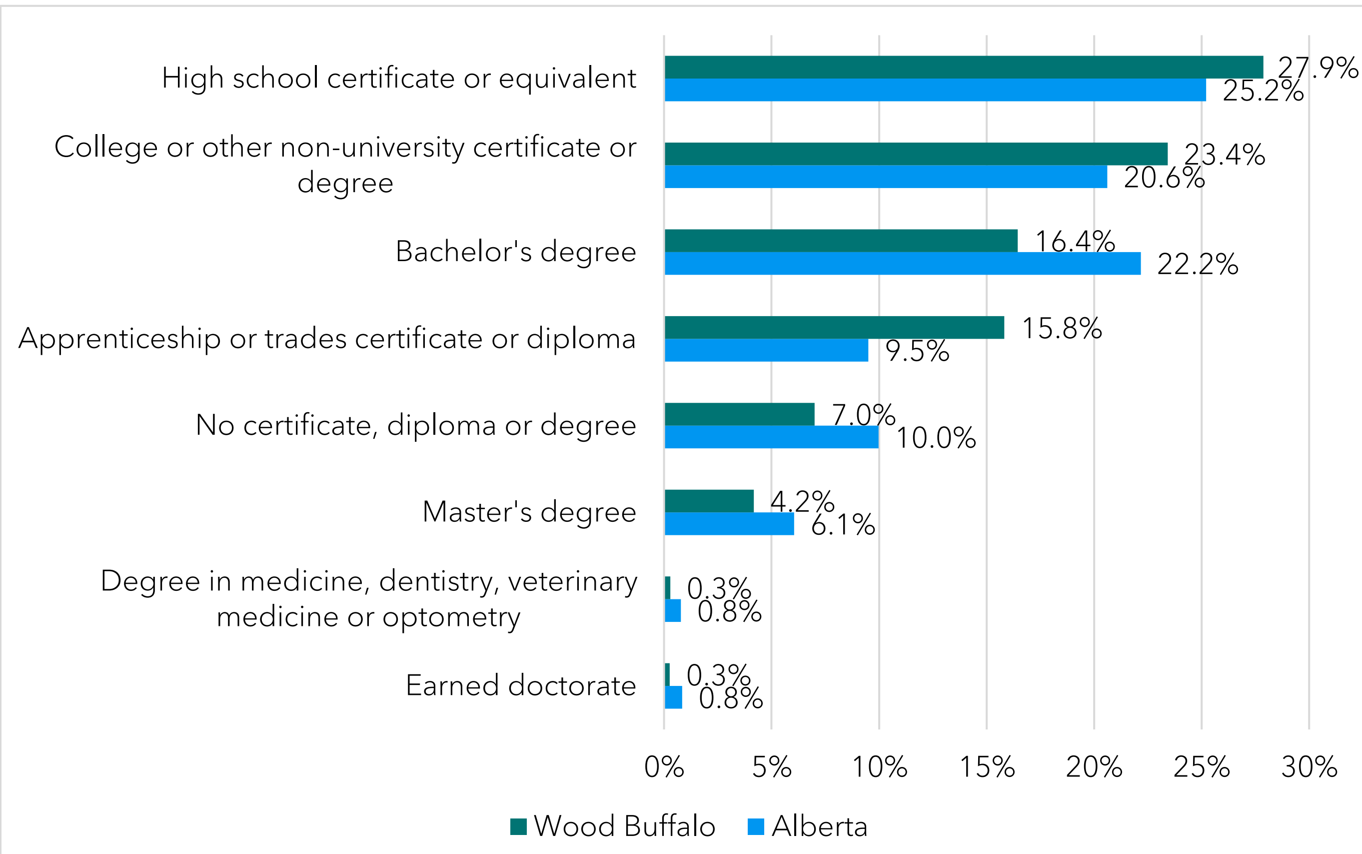


Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2024.

1.3 Labour Skills Supply

Approximately 58% of residents 15 years and older have completed postsecondary education in Wood Buffalo, compared to 56% in Alberta. When looking at residents ages 25 to 64 (prime working age) the percentage increases to 65% in the Region, which is comparable to Alberta (65%). The following figure shows the difference in postsecondary attainment levels between the Regional Municipality and Alberta and illustrates the fact that the Region's talent supply is oriented towards technical skills (usually requiring trades, apprenticeships, or college certificates and/or diplomas) more than university certificates (which see greater representation at the provincial level).

Figure 9: Postsecondary Attainment[7] Levels in the Regional Municipality - 2024



Source: Manifold SuperDemographics 2024

[7] Trades certificate or includes trades certificates or diplomas such as pre-employment or vocational certificates and diplomas from brief trade programs completed at community colleges, institutes of technology, vocational centres and similar institutions. Certificate of Apprenticeship or Certificate of Qualification' also includes Journeyperson's designations.

The following table illustrates the major fields of study for residents in the RM completing a postsecondary program, and how they compare to the share of residents in Alberta attaining these types of skills/knowledge. The fields of study that are concentrated in the RM (i.e., attained by a larger share of the residents), relative to the province, represent strengths and are highlighted with bolded text. Unsurprisingly, given local labour opportunities, many of the concentrated fields of study locally are related to technical skills and skilled trades.

Table 9: Common Major Fields of Study in Wood Buffalo and Alberta, over 0.5% of residents, 2023

Major Field of Study	Wood Buffalo	% Wood Buffalo	% Alberta
Total	62,397	100%	100%
No postsecondary certificate, diploma or degree	26,535	42.5%	44.6%
Business, management, marketing and related support services	6,517	10.4%	11.0%
Engineering technologies and engineering-related fields	**3,740**	**6.0%**	**3.2%**
Health professions and related programs	3,606	5.8%	8.1%
Mechanic and repair technologies/technicians	**3,331**	**5.3%**	**2.5%**
Construction trades	**2,983**	**4.8%**	**2.9%**
Engineering	2,590	4.2%	3.4%
Education	1,852	3.0%	3.8%
Transportation and materials moving	**1,477**	**2.4%**	**0.5%**
Precision production	**1,236**	**2.0%**	**1.4%**
Computer and information sciences and support services	1,014	1.6%	1.8%
Personal and culinary services	905	1.5%	1.8%
Social sciences	869	1.4%	1.9%
Family and consumer sciences/human sciences	523	0.8%	0.8%
Visual and performing arts	483	0.8%	1.3%
Liberal arts and sciences, general studies and humanities	419	0.7%	0.8%

Major Field of Study	Wood Buffalo	% Wood Buffalo	% Alberta
Security and protective services	398	0.6%	0.5%
Natural resources and conservation	385	0.6%	0.4%
Public administration and social service professions	364	0.6%	0.6%
Psychology	362	0.6%	0.9%
Physical sciences	342	0.5%	0.8%
Legal professions and studies	330	0.5%	0.9%

Source: Manifold SuperDemographics 2024

1.4 Excess Labour Supply

The Canadian Census (most recently conducted in 2021) is the only tool available to measure excess labour supply. It allows for an investigation into which skills (by major field of study) have the highest unemployment rates (i.e., represent excess supply), and which skills have the highest employment rates (i.e., have a tight labour supply).

For apprenticeships certificates and trades, underutilized/underemployed major fields of study (unemployment rate above 7.5%) include:

- Health professions and related programs;
- Culinary, entertainment, and personal services;
- Transportation and materials moving;
- Engineering/engineering-related technologies/technicians; and
- Precision production.

Meanwhile, at apprenticeships certificates and trades level, the following major fields of study had the highest employment rates (above 81%) / tightest labour markets:

- Mechanic and repair technologies/technicians;
- Transportation and materials moving;[8]
- Engineering/engineering-related technologies/technicians; and
- Construction trades.

At the college level, the most underutilized/underemployed fields of study (unemployment rate above 9%) include:

- Public administration and social service professions;
- Visual and performing arts;
- Family and consumer sciences/human sciences; and
- Natural resources and conservation.

Comparatively, at the college level, the highest employment rates (above 84%) were related to:

- Communication, journalism and related programs;

[8] Appearing on both the list of underemployed fields of study and tightest labour markets suggests that graduates with this degree are both aggressively looking for work (i.e., participating in the labour force, raising the employment rate) and likely outnumber the number of jobs available locally (i.e., there are more graduates than jobs, meaning many are looking for work and therefore unemployed).

- Mechanic and repair technologies/technicians;
- Transportation and materials moving.

It should be noted that a host of college degree fields of study have 100% employment rates but are not included here, including *communications technologies/technicians and support services; liberal arts and sciences, general studies and humanities; biological and biomedical science; physical sciences;* and *library science*. They are not included because the number of residents with this degree is quite low (under 100).

At the bachelor level, the most underutilized/underemployed fields of study (unemployment rate above 13%) include:

- Biological and biomedical sciences;
- Communication, journalism and related programs; and
- Liberal arts and sciences, general studies and humanities.

Meanwhile, at the bachelor level, the highest employment rates (above 84%) were related to:

- Engineering;
- Physical sciences;
- Agriculture and veterinary sciences/services/operations and related fields.

Once again, as with college graduate fields, a host of bachelor's degree fields of study have 100% employment rates but not enough residents having completed the degree to warrant discussion, including *theology and religious vocations; family and consumer sciences/human sciences; architecture;* and *interdisciplinary physical and life sciences.*

1.5 Labour Force Status & Activity

The Region's labour force status, employment by industry, employment income levels, work activity, and class of work are examined here and used to summarize the current labour market conditions. Manifold SuperDemographics estimated the labour force status for Wood Buffalo compared to Alberta for 2023. The following table illustrates total labour force engagement as well as unemployment, employment and participation rates in 2024.

Wood Buffalo has a labour force of approximately 62,397 individuals. Wood Buffalo has higher participation (74.4% compared to 69.0%) and employment rates (70.8%/64.5%), and a lower unemployment rate (4.8%/6.4%) relative to Alberta. This is a positive indicator, as it suggests that compared to the province, more residents are engaging in the labour force. A lower unemployment rate also suggests that those individuals who are looking for work are finding it at a better rate than their Alberta counterparts.

Table 10: Key Labour Force Statistics by Gender, Wood Buffalo, 2024.

Labour Force Activity	Wood Buffalo			Alberta		
	Total	Male	Female	Total	Male	Female
Total population 15 years and over	62,397	32,937	29,460	3,949,005	1,957,180	1,991,825
In the labour force	46,442	27,269	19,173	2,723,964	1,448,943	1,275,021
Employed	44,196	26,230	17,967	2,548,771	1,353,653	1,195,119
Unemployed	2246	1039	1207	175,193	95,290	79,903
Not in the labour force	15,955	5,668	10,287	1,225,040	508,237	716,804
Participation rate %	74.4	82.8	65.1	69.0	74.0	64.0
Employment rate %	70.8	79.6	61.0	64.5	69.2	60.0
Unemployment rate %	4.8	3.8	6.3	6.4	6.6	6.3

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2024.

Wood Buffalo has a higher participation rate than Alberta, suggesting that residents are more engaged in the economy.

Table 11 illustrates labour force characteristics for youth (15 to 24) and mature adults (25 and older) in Wood Buffalo, benchmarked against Alberta data. Wood Buffalo has a higher youth participation rate, suggesting that Wood Buffalo youth are significantly interested in engaging in the labour force. Notably, the gap is entirely due to male youth engagement, which is considerably higher than the provincial figure. This data suggests that female youth in Wood Buffalo are slightly *less* likely to be participating in the economy compared to Alberta. With a considerably higher unemployment rate compared to their male (and provincial) counterparts, this data also suggests that female youth in Wood Buffalo who are looking for work are struggling to find it. Understanding how to better engage female youth may help build upon these otherwise strong economic engagement figures.

Table 11: Labour Force Characteristics by Age and Gender, 2024.

Population 15 to 24 years old:						
	Wood Buffalo			Alberta		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	68.0	73.7	62.2	62.9	62.0	63.9
Employment rate (%)	58.5	66.5	50.4	55.0	54.3	55.8
Unemployment rate (%)	13.9	9.8	18.9	12.6	12.4	12.7
Population 25 years and over:						
	Wood Buffalo			Alberta		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	75.7	79.3	72.5	66.5	71.8	61.6
Employment rate (%)	73.3	76.8	70.2	63.7	68.9	58.9
Unemployment rate (%)	3.2	3.2	3.2	4.2	4.0	4.3

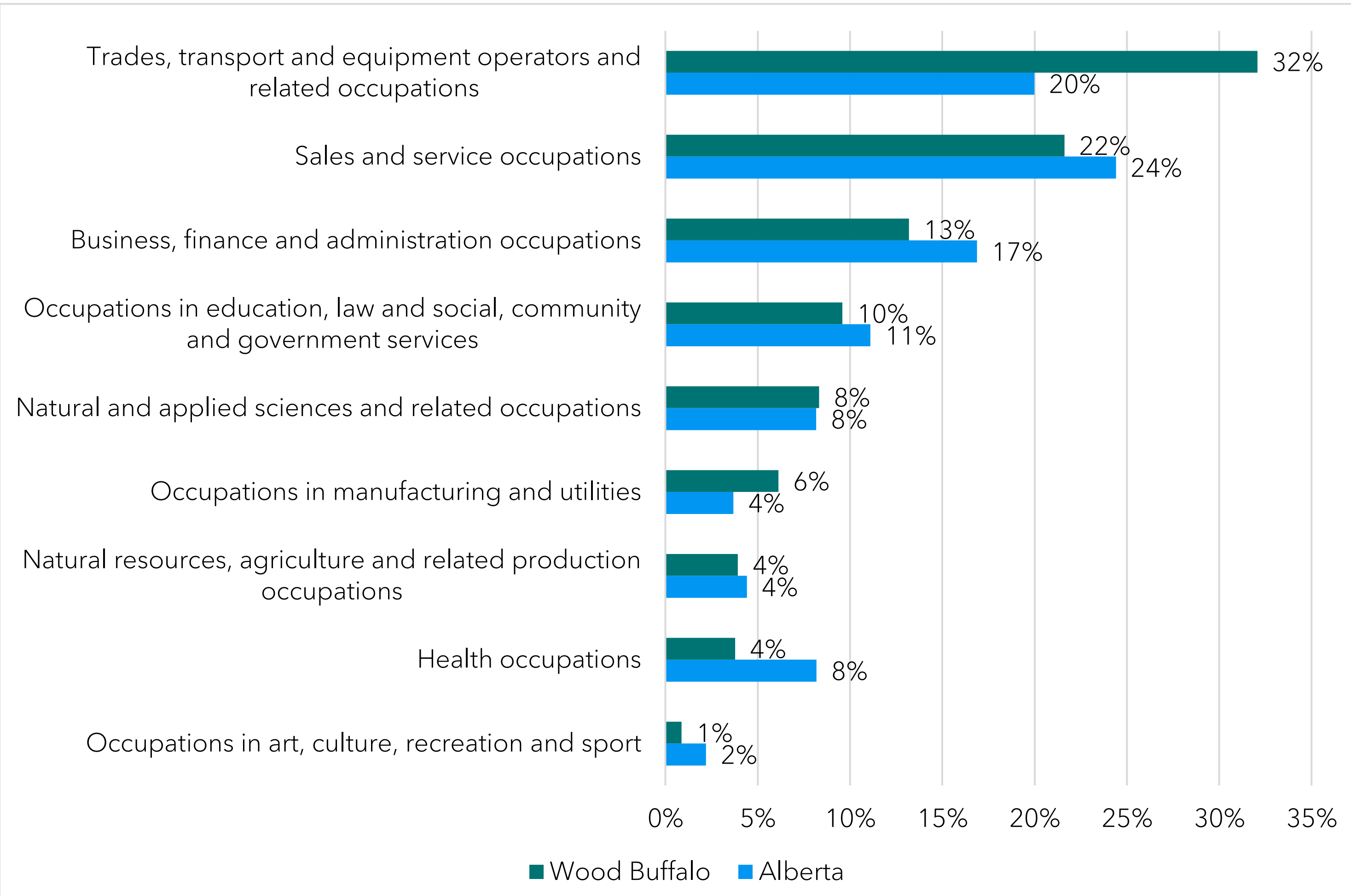
Source: Manifold SuperDemographics, 2024.

1.6 Labour Supply in Wood Buffalo

With regard to what occupations, at a broad level, Figure 10 shows that most commonly, Wood Buffalo residents work in:

- Trades, transport and equipment operators and related occupations;
- Sales and service occupations; and
- Business, finance and administration occupations.

Figure 10: Resident Labour Force by Occupation, 1-digit NOCs, 2024.



Source: Manifold SuperDemographics 2024.

Table 12 presents a breakdown of the top occupations (those representing at least 1% of the available jobs), at a more specific occupation classification. As can be seen, unsurprisingly, the most heavily concentrated occupations locally are mining, oil and gas, transportation, and trades related.

Table 12: Most Heavily Concentrated Jobs, Wood Buffalo, 2022

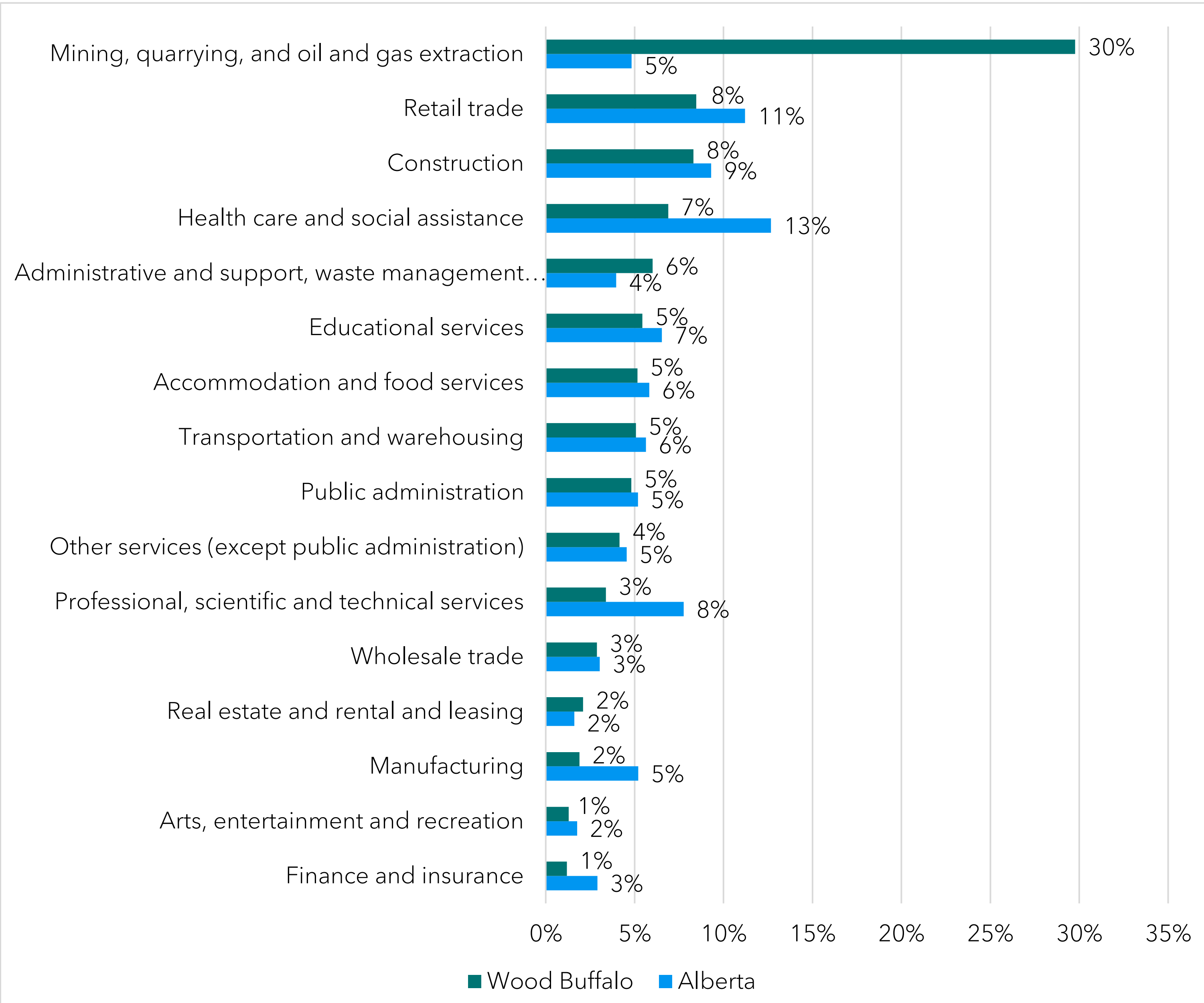
Occupation Classification	2022 Jobs	Percentage of Local Jobs
Underground miners, oil and gas drillers and related occupations	4,416	6.6%
Machinery and transportation equipment mechanics (except motor vehicles)	3,128	4.7%
Contractors and supervisors, mining, oil and gas	2,403	3.6%
Transport truck and transit drivers	2,341	3.5%
Cleaners	2,140	3.2%
Retail salespersons and non-technical wholesale trade sales and account representatives	1,737	2.6%
Cashiers and other sales support occupations	1,530	2.3%
Technical electrical trades and electrical power line and telecommunications workers	1,529	2.3%
Machining, metal forming, shaping and erecting trades	1,310	2.0%
Food support occupations	1,289	1.9%
Contractors and supervisors, technical maintenance trades and heavy equipment and transport operators	1,277	1.9%
Unclassified occupation	1,237	1.9%
Administrative, property and payroll officers	1,202	1.8%
Office support and court services occupations	1,170	1.8%
Central control and process operators in processing and manufacturing	1,060	1.6%
Secondary, elementary and kindergarten school teachers	1,058	1.6%
Operators, drillers and blasters	961	1.4%
Supply chain logistics, tracking and scheduling coordination occupations	909	1.4%

Occupation Classification	2022 Jobs	Percentage of Local Jobs
Technical inspectors and regulatory officers	890	1.3%
Contractors and supervisors, technical industrial, electrical and construction trades and related workers	853	1.3%
Office administrative assistants - general, legal and medical	750	1.1%
Managers in construction and facility operation and maintenance	687	1.0%
Retail sales supervisors	686	1.0%
Financial, insurance and related administrative support workers	668	1.0%
Customer and information services representatives	665	1.0%
Total	66,698	100%

Source: Lightcast Analyst 2024.1

Figure 11 illustrates the industries in Wood Buffalo that represent at least 1.0% of all local employment. Wood Buffalo has larger labour concentrations relative to Alberta in several sectors, but most prominently in mining, quarrying, and oil and gas extraction. Residents are employed at six times the provincial rate within this sector, which represents 30% of local employment and only 5% of provincial employment.

Figure 11: Labour Force by Industry, 2023.



Source: Manifold SuperDemographics 2023.

Similar to Table 12 focusing on occupations, Table 13 presents a breakdown of the top **industries** (those representing at least 1% of the available jobs), at a more specific classification. Once again, the oil and gas extraction sector is well represented, with the main industry combined with "support activities" representing nearly one-third (30.9%) of all jobs in Wood Buffalo.

Table 13: Most Heavily Concentrated Jobs, Wood Buffalo, 2022

Occupation Classification	2022 Jobs	Percentage of Local Jobs
Oil and gas extraction	15,338	23.0%
Support activities for mining, and oil and gas extraction	5,269	7.9%
Other specialty trade contractors	3,041	4.6%
Services to buildings and dwellings	2,213	3.3%
Full-service restaurants and limited-service eating places	2,205	3.3%
Elementary and secondary schools	1,815	2.7%
Building equipment contractors	1,742	2.6%
Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	1,625	2.4%
Commercial and industrial machinery and equipment rental and leasing	1,578	2.4%
Rooming and boarding houses	1,499	2.2%
Architectural, engineering and related services	1,496	2.2%
Local, municipal and regional public administration	1,481	2.2%
Unclassified	1,237	1.9%
General medical and surgical hospitals	1,136	1.7%
Utility system construction	1,020	1.5%
Grocery stores	873	1.3%
Traveller accommodation	832	1.2%
Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	803	1.2%
Investigation and security services	778	1.2%

Occupation Classification	2022 Jobs	Percentage of Local Jobs
Total	66,698	100%

Source: Lightcast Analyst 2024.1

In the Regional Municipality, a larger percentage of the population worked full-time in 2023 compared to the province, and a higher percentage of the population had some form of employment income as well. Both of these metrics suggest that the local population is significantly engaged in the workforce.

When it comes to comparing male and female populations, the median employment income for all work activity (full-time and part-time combined) is 87.1% higher (nearly double) for men than for women. Specifically, the median income for men over 15 in Wood Buffalo is $191,550, compared to $102,385 for women). This gap is considerably larger than what is seen across the province, where men's median employment income is only 27.1% higher than for women.

Table 14: Employment Income by Work Activity - 2023

Work Activity	RM of Wood Buffalo	Alberta
% Population ages 15 years and over with employment income	82%	72%
% population ages 15 years and over with full-time/full year income	41%	35%
% of the **Male** population with employment income ages 15 years and over who worked full-time/full year	49%	40%
% of the **Female** population with employment income ages 15 years and over who worked full-time/full year	32%	30%

Source: Manifold SuperDemographics 2024

1.7 Economic Output

This subsection highlights industries with the largest economic impact. Table 15 illustrates subindustries with the highest level of economic output as measured by total sales. Average wages by industry are also illustrated. Each of the top 19 subindustries by total sales supports average wages over $53,000, providing a strong quality of life for employees of those sectors. The only sector within the top 20 that does not provide average wages over $50,000 (full-service restaurants and limited-service eating places) typically employs part-time or season individuals, which skew average wages, which are assessed on a "full-time equivalent" basis. Unsurprisingly, oil and gas extraction businesses dominate total sales in Wood Buffalo, accounting for three quarters of all sales (75.3%).

Table 15: Economic Output by Industry, 2021.

Industry	Sales	Average Wages
Oil and gas extraction	$49,892,703,054	$156,494
Petroleum and coal product manufacturing	$2,438,373,665	$86,279
Support activities for mining, and oil and gas extraction	$1,430,047,420	$105,553
Other specialty trade contractors	$1,040,020,837	$98,550
Commercial and industrial machinery and equipment rental and leasing	$898,945,996	$111,189
Building equipment contractors	$643,725,241	$109,050
Local, municipal and regional public administration	$496,194,499	$113,006
Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	$434,601,165	$121,870
Metal ore mining	$428,243,696	$120,763
Residential building construction	$419,943,890	$83,892
Services to buildings and dwellings	$393,354,367	$59,680
Utility system construction	$374,575,194	$88,557
Architectural, engineering and related services	$358,555,428	$96,400
Lessors of real estate	$338,765,726	$93,712
Specialized freight trucking	$322,672,659	$88,521
Non-residential building construction	$320,354,084	$90,693

Industry	Sales	Average Wages
Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	$243,469,354	$114,433
Rooming and boarding houses	$242,369,970	$53,599
Elementary and secondary schools	$241,781,014	$70,741
Full-service restaurants and limited-service eating places	$203,725,244	$30,301
Total (all industries)	$66,182,760,476	**$99,726**

Source: Lightcast 2024.1, based on 2021 National Input-Output Tables by StatsCan.

1.8 Export Sales

Exports show the amount of money that is spent by industries outside the region (domestically and internationally) in exchange for goods or services produced by an industry located in the Regional Municipality. In 2021, the most recent data available, total export sales from Wood Buffalo amounted to just over $58 billion. Table 16 presents the twenty largest drivers of external revenues into Wood Buffalo. Once again, these figures are dominated by the impact of oil and gas extraction businesses, which saw exports of over $47 billion, representing 81.4% of the Regional Municipality's total.

Table 16: Top Export Dollars Flowing into Wood Buffalo by Industry, 2021.

Industry	Total Export Sales
Oil and gas extraction	$47,485,155,277
Petroleum and coal product manufacturing	$1,970,260,583
Support activities for mining, and oil and gas extraction	$869,769,772
Commercial and industrial machinery and equipment rental and leasing	$803,297,156
Other specialty trade contractors	$765,281,056
Local, municipal and regional public administration	$426,007,631
Metal ore mining	$392,107,540
Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	$360,560,841

Industry	Total Export Sales
Building equipment contractors	$340,752,066
Services to buildings and dwellings	$295,844,946
Utility system construction	$247,108,393
Specialized freight trucking	$240,637,404
Rooming and boarding houses	$226,440,859
Architectural, engineering and related services	$203,025,080
Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	$201,244,056
Elementary and secondary schools	$194,423,794
Aboriginal public administration	$142,086,188
General medical and surgical hospitals	$124,844,925
School and employee bus transportation	$119,967,123
Lessors of real estate	$114,643,100
Total	**$58,310,815,799**

Source: Lightcast 2024.1, based on 2021 National Input-Output Tables by StatsCan.

1.9 Industry Supply Chain Analysis

Supply chain analysis helps determine which economic activities “bring money in”, and where money might be “leaking out”. Table 17 presents industries with over $100 million in purchases in Wood Buffalo, noting the percentage of purchases that are made in-region and out-of-region. The majority of purchases made by the largest economic drivers are imported. The only industry where less than half of purchases are imported is mining, quarrying, and oil and gas extraction, where 43% of goods are still imported. This reality is not atypical of smaller municipalities; especially one with such a dependence on international-in-scope industries. However, it is possible that there are opportunities to attract aspects of the supply chain to Wood Buffalo to lower costs.

Table 17: Top Industries by Purchasing Power, Wood Buffalo, 2021.

Industry	Total Sector Purchases	% Purchased in Region	Percentage Imported
Manufacturing	$5,555,414,011	9%	91%
Mining, quarrying, and oil and gas extraction	$5,006,110,849	57%	43%
Professional, scientific and technical services	$2,824,320,428	7%	93%
Administrative and support, waste management and remediation services	$1,769,125,048	14%	86%
Finance and insurance	$1,554,250,949	3%	97%
Wholesale trade	$1,202,840,735	8%	92%
Transportation and warehousing	$1,146,692,961	19%	81%
Utilities	$642,595,983	3%	97%
Real estate and rental and leasing	$575,802,512	28%	72%
Construction	$511,418,113	19%	81%
Management of companies and enterprises	$501,879,392	5%	95%
Information and cultural industries	$424,713,670	4%	96%
Retail trade	$300,559,993	12%	88%
Other services (except public administration)	$191,237,458	29%	71%
Public administration	$179,496,293	16%	84%
Accommodation and food services	$113,230,991	29%	71%

Source: Lightcast 2024.1, based on 2021 National Input-Output Tables by StatsCan.

2. Indigenous Focus

Fort McMurray Wood Buffalo includes a large urban and rural Indigenous population. As part of the Regional Workforce Strategy, data and analysis has been conducted focusing specifically on the demographic and labour force profiles of the Indigenous population in the region. This section profiles available socio-demographic, education, income, and labour data for the Indigenous communities. The region is home to six First Nations and six Métis Communities:

- Athabasca Chipewyan First Nation
- Chard Métis Nation
- Chipewyan Prairie First Nation
- Conklin Métis Local
- Fort Chipewyan Métis Nation
- Fort McKay First Nation
- Fort McKay Métis Nation
- Fort McMurray 468 First Nation
- McMurray Métis Local #1935
- Mikisew Cree First Nation
- Smith's Landing First Nation
- Willow Lake Métis Nation

A Note on Terminology and Data

In using the term "Indigenous", we are following the direction of the Fort McMurray Wood Buffalo website. Specifically, we *"use the term 'Indigenous' respectfully to describe the original Peoples of the land (First Nations and Métis) The term "Indigenous" has been adopted by the provincial and federal government and used around the world."*

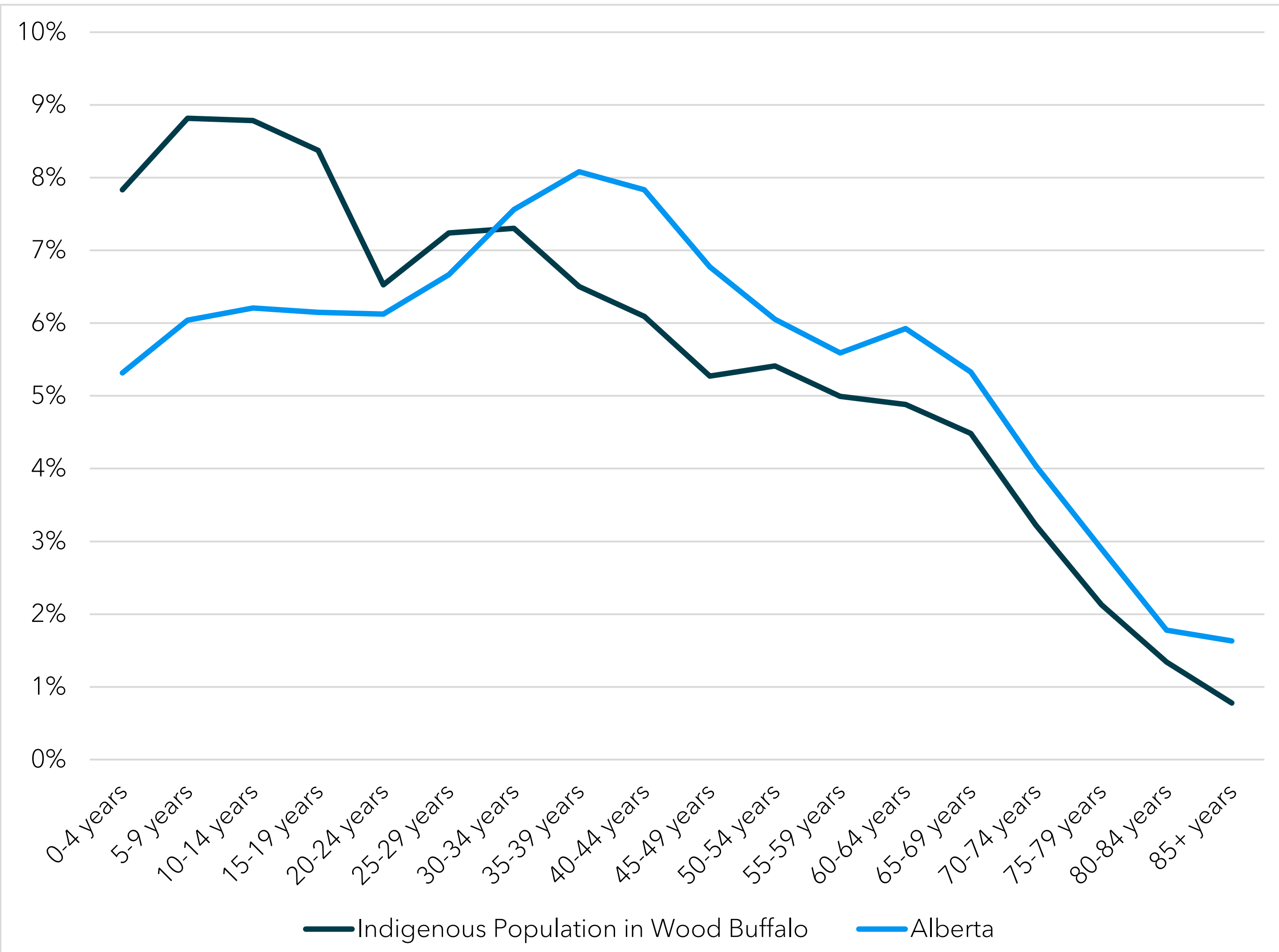
With respect to Manifold's labour force and demographic data, Indigenous identify is aligned with official Government of Canada definitions. That is, Indigenous Identity is defined as those persons who reported identifying with at least one Aboriginal group (i.e., North American Indian, Métis or Inuit, and/or those who reported being a Treat Indian or a Registered Indian as defined by the Indian Act of Canada and/or who were members of an Indian Band or First Nation. Included in the Aboriginal population are those persons who reported identifying with at least one Aboriginal group, that is, 'North American Indian', 'Métis' or 'Inuit (Eskimo)', and/or who reported being a Treaty Indian or a Registered Indian, as defined by the Indian Act of Canada, and/or who reported they were members of an Indian Band or First Nation.

2.1 Population

Figure 1 begins by contrasts the age profile of Indigenous peoples in Wood Buffalo and Alberta, in 2024. Indigenous people in Wood Buffalo are heavily represented by youth, with significantly more proportional representation of this population under the age of 30, compared to Alberta. All other age cohorts see a lesser relative percentage of the population compared to provincial benchmarks.

This is an intriguing trendline, in that as this younger population ages, significant opportunities abound to engage them economically and drive success in the region.

Figure 12: Percent Population by Age, Indigenous Population in Wood Buffalo and Alberta, 2024.



Source: Custom Calculations, Manifold SuperDemographics 2024.

The Indigenous Community, unsurprisingly, has a younger age profile compared to Alberta. That is, the Indigenous population's average age of is 34.5, compared to 39.5 across the province. As can be seen in Table 1, over one-in-four (25.4%) of Indigenous peoples in the area are between the ages of 0 and 14. Supporting this age cohort in education and training will be imperative to ensure developmental opportunities are not missed. Overall, Wood Buffalo's working-age population (ages 15-64, 62.6%) is slightly lower than Alberta's (66.8%), with an even more stark gap in older working-aged adults, as highlighted in Figure 1 above.

Table 18: Indigenous Population in Wood Buffalo and Alberta Age Profile, 2024.

Age Group	Indigenous Population in Wood Buffalo	Alberta
0-14	25.4%	17.6%
15-64	62.6%	66.8%
65+	12.0%	15.7%

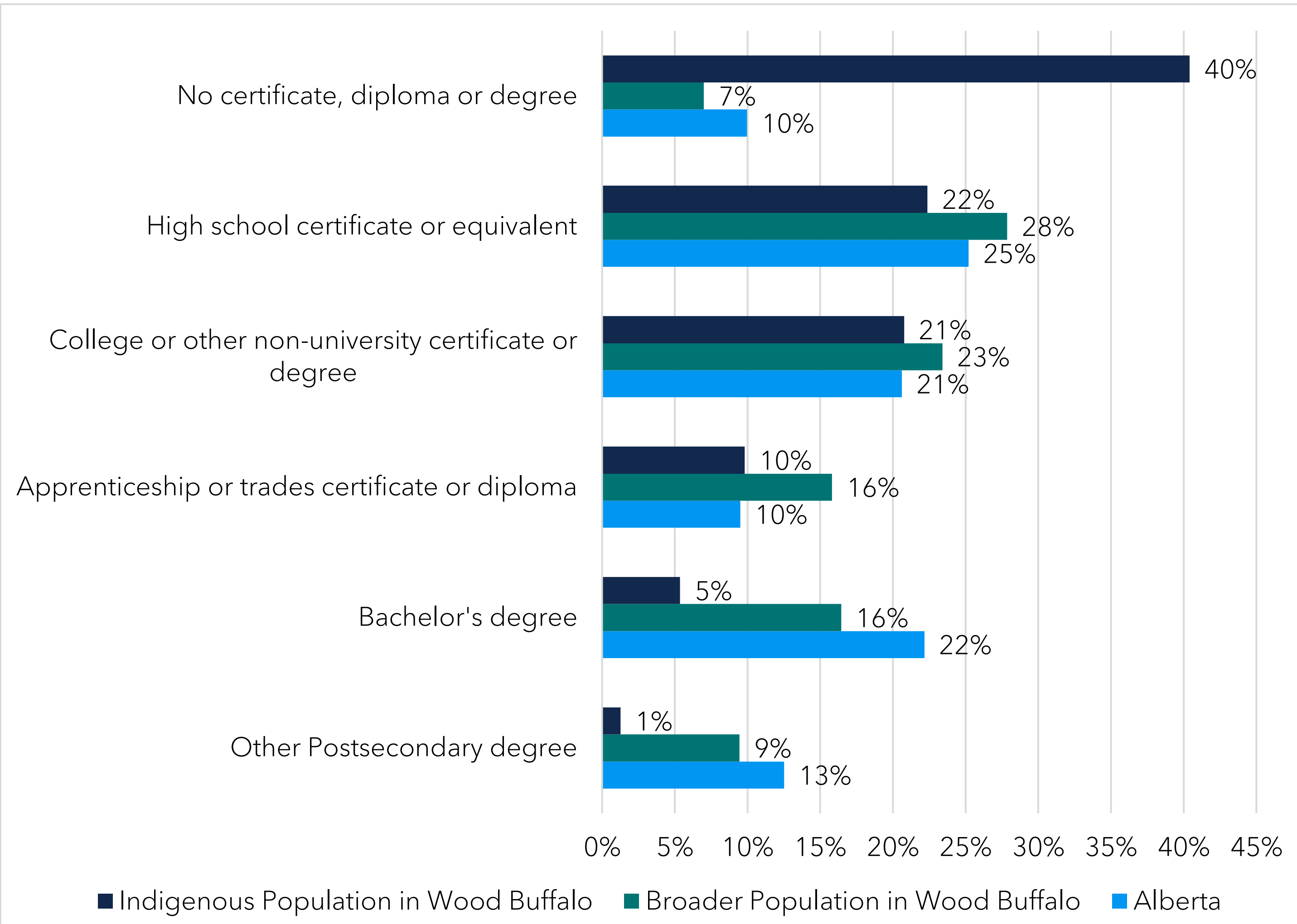
Source: Custom Calculations, Manifold SuperDemographics 2024.

2.2 Education

For the population ages 25-64, Indigenous peoples have a much higher likelihood of completing school without any formal certificate, diploma, or degree (40% of individuals). As noted in the population cohort subsection, there is a significant youth population in the area that has the potential to significantly change these figures.

In terms of post-secondary education, the Indigenous population is comparatively likely to have a college degree as both benchmark areas, and is similar to provincial rates (10%) in terms of apprenticeship or trades certificates or diplomas.

Figure 13: Education Levels, Indigenous and General Populations Locally and Alberta, 2024

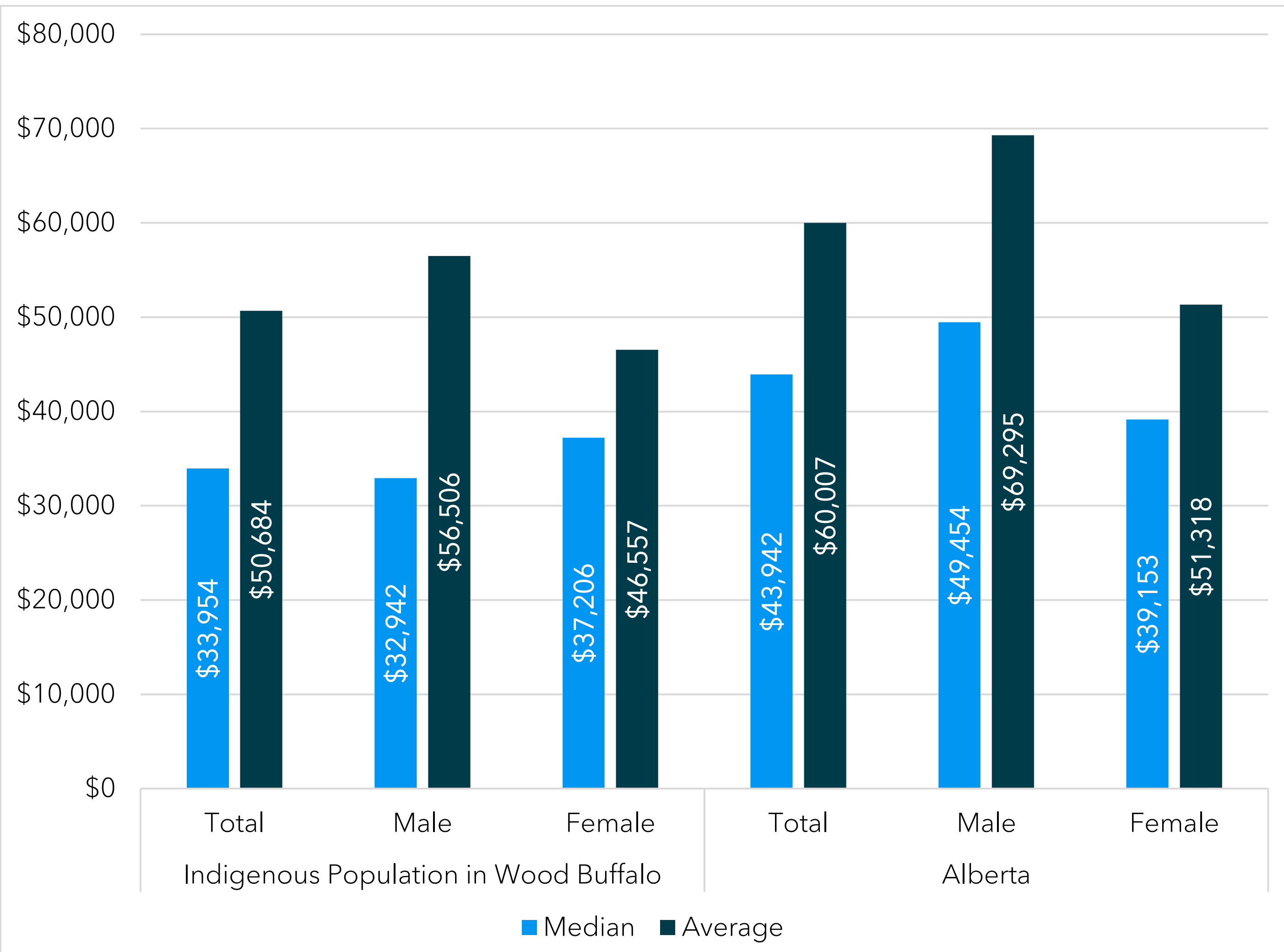


Source: Custom Calculations, Manifold SuperDemographics 2024.

2.3 Income

With respect to income data, the local Indigenous population lags behind provincial figures ($33,954 median income locally compared to $43,942 provincially). Of note, the majority of this difference is due to the male population, with female median incomes locally ($37,206) comparing favourably to provincial medians ($39,153). For the male population, the difference was sizable, with median incomes of $32,942 locally compared to a median income of $49,454 across the province.

Figure 14: Median and Average Employment Income, Indigenous Population in Wood Buffalo and Total Alberta Population, 2024 (2023 incomes)



Source: Custom Calculations, Manifold SuperDemographics 2024.

We can further break income analysis down by providing total cohort counts by income levels. As can be seen in Table 19, while males have a larger percentage of people earning under $29,999 (explaining the lower median income) it also has a substantially larger percentage of individuals earning over $100,000 (explaining the higher average income for males).

Table 19: Income cohorts, male and female, Indigenous Population, Wood Buffalo, 2024

Characteristic	Total	Male	Female
Total 15 years and over	6,901	3,528	3,372
Without total income	619	344	275
With total income	6,282	3,184	3,097
Under $10,000 (including loss)	675	403	271
$10,000 to $19,999	752	384	369
$20,000 to $29,999	1,200	615	585
$30,000 to $39,999	852	363	488
$40,000 to $49,999	636	263	373
$50,000 to $59,999	465	173	293
$60,000 to $69,999	428	176	251
$70,000 to $79,999	270	141	129
$80,000 to $89,999	210	119	91
$90,000 to $99,999	186	114	71
$100,000 and over	606	431	175
Characteristic	Total	Male	Female
Median total income $	$39,136	$32,942	$37,206
Average total income $	$51,643	$56,506	$46,557

Source: Custom Calculations, Manifold Superdemographics 2024.

2.4 Labour Force Participation

Within the labour force, the Indigenous population locally is less likely to be engaging in the labour market (lower participation rate) or finding work (lower employment rate and higher unemployment rate) compared to the broader Alberta population. Understanding how to better promote economic engagement and raise employment rates will be a considerable focal point of the qualitative assessment within this project.

Table 20: Labour Force Activity, Indigenous Population and Provincial Benchmark, 2024

Labour Force Activity	Indigenous Population in Wood Buffalo			Alberta		
	Total	Male	Female	Total	Male	Female
Total population 15 years and over	6,901	3,528	3,372	3,949,005	1,957,180	1,991,825
In the labour force	3,679	2,003	1,676	2,723,964	1,448,943	1,275,021
Employed	3,348	1,821	1,529	2,548,771	1,353,653	1,195,119
Unemployed	331	182	147	175,193	95,290	79,903
Not in the labour force	3,222	1,526	1,696	1,225,040	508,237	716,804
Participation rate %	53.3	56.8	49.7	69.0	74.0	64.0
Employment rate %	48.5	51.6	45.3	64.5	69.2	60.0
Unemployment rate %	9.0	9.1	8.8	6.4	6.6	6.3

Source: Custom Calculations, Manifold Superdemographics 2024.

We can similarly assess labour force activity specific to youth. Table 21 presents this information, showcasing that once again local rates of participation and employment lag considerably behind their provincial counterparts. Considering the population breakdown assessed in subsection 2.1, understanding how to engage youth locally is critically important. That is, because of the large percentage of youth relative to the total population, engaging this cohort and identifying/overcoming barriers will help foster significant successes into the future.

Table 21: Youth (15-24) Labour Force Activity, Indigenous Population and Provincial Benchmark, 2024

Labour Force Activity	Indigenous Population in Wood Buffalo			Alberta		
	Total	Male	Female	Total	Male	Female
Total population 15 years and over	1,379	689	691	587,794	288,362	299,433
In the labour force	516	265	251	368,369	185,242	183,127
Employed	422	211	209	316,870	160,984	155,887
Unemployed	94	54	42	51,499	24,259	27,240
Not in the labour force	864	424	440	219,425	103,119	116,306
Participation rate %	37.4	38.5	36.3	62.7	64.2	61.2
Employment rate %	30.6	30.6	30.2	53.9	55.8	52.1
Unemployment rate %	18.2	20.4	16.8	14.0	13.1	14.9

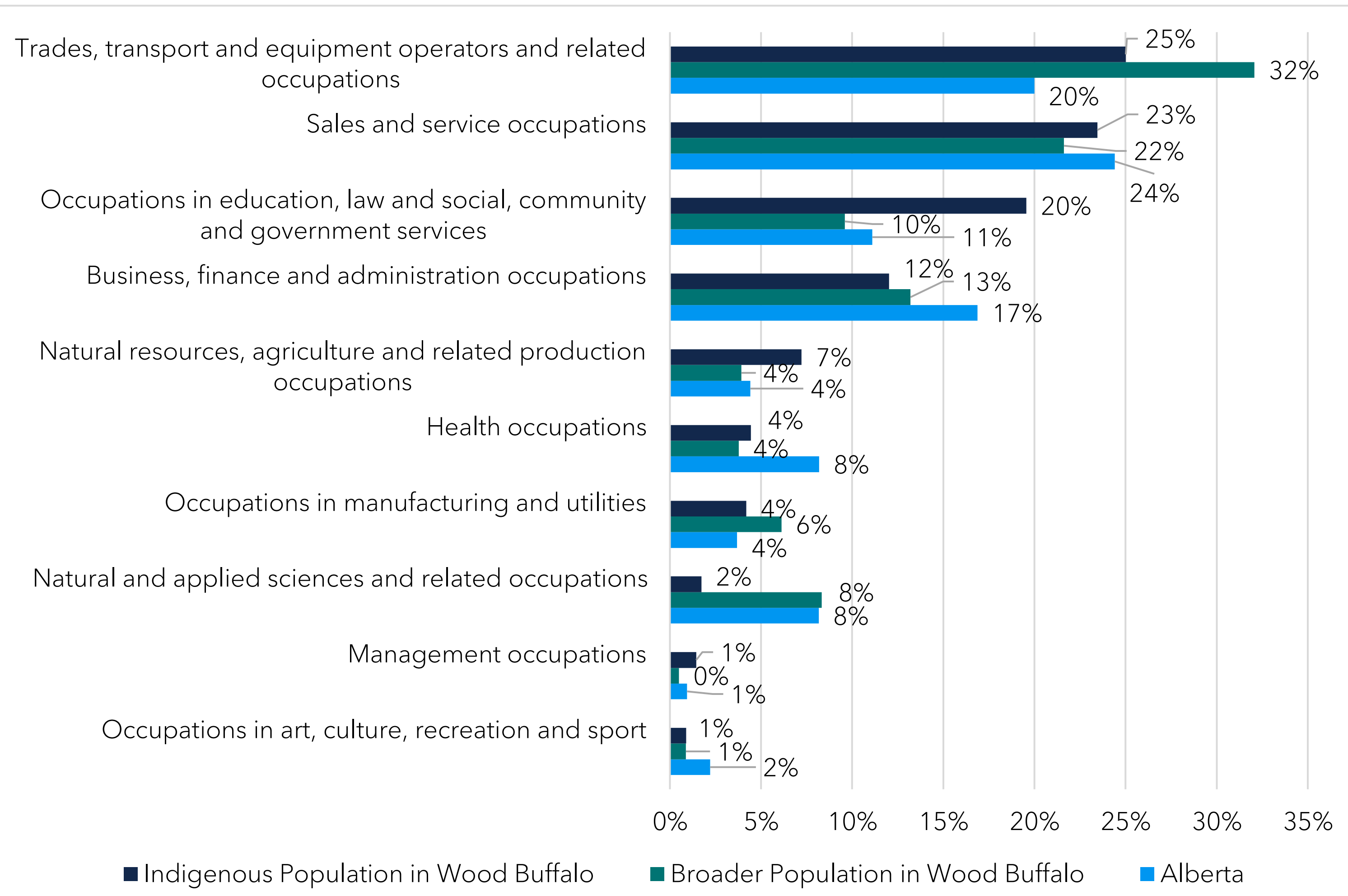
Source: Custom Calculations, Manifold SuperDemographics 2024.

2.5 Occupations of Employment

Figure 15 presents occupations of employment at a relative level for the Indigenous and general populations locally, and for the broader Alberta population. As a percentage of employment totals, the Indigenous population is most likely to be employed in:

- Trades, transport and equipment operators and related occupations (more concentrated within the region compared to the provincial benchmark– 25% to 20%);
- Sales and service occupations (23%, similar to local and provincial benchmarks); and
- Occupations in education, law and social, community and government services (20%, nearly double the rate of each benchmark region, which had rates of 10% and 11% respectively).

Figure 15: Occupations of Employment, Indigenous and General Populations Locally and Across Alberta, 2024



Source: Custom Calculations, Manifold SuperDemographics 2024.

2.6 Field of Study

The final table presented here assesses field of study for the local population, with those identifying as Indigenous benchmarked to the broader population in Wood Buffalo. As can be seen, decisions regarding field of study are fairly similar, with a larger percentage of Indigenous people choosing to study:

- Architecture, engineering, and related trades (42% of the Indigenous population compared to 38% of the broader population); and
- Personal, protective and transportation services (10% compared to 7%).

Correspondingly, the data shows fewer Indigenous people pursuing:

- Education (3% of the Indigenous population compared to 5% in the benchmark); and
- Humanities, physical and life sciences and technologies, and mathematics, computer and information sciences (each 1% compared to 3%).

Table 22: Field of Study for the Indigenous Population in Wood Buffalo, Benchmarked to the Broader Population in Wood Buffalo

Field of Study	Indigenous Population in Wood Buffalo	Broader Population in Wood Buffalo
Architecture, engineering, and related trades	42%	38%
Business, management and public administration	19%	19%
Personal, protective and transportation services	10%	7%
Health and related fields	9%	11%
Social and behavioural sciences and law	7%	7%
Agriculture, natural resources and conservation	4%	2%
Education	3%	5%
Visual and performing arts, and communications technologies	2%	2%
Humanities	1%	3%
Physical and life sciences and technologies	1%	3%
Mathematics, computer and information sciences	1%	3%

Source: Statistics Canada. Table 98-10-0414-01 Highest level of education by major field of study and Indigenous identity: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts.

3. Analysis of Primary Data Collected

The consultation process used to complete this Regional Labour Market Needs Assessment was meaningful and intensive. Participants were actively engaged, representing local businesses, community stakeholders, regional stakeholders, staff, Indigenous community members and businesses, elected officials, and residents interested in the well-being of the area and have gathered valuable input and information.

There were 233 participants throughout the consultation process. Specifically, there were:

- 17 phone interviews were conducted with key partners.
- 36 participants engaged in four focus groups (Indigenous community members, Regional Labour Market Committee, employers, and local business support organizations).
- 110 responses were gathered through an online survey targeted at job seekers and employees.
- 70 responses were gathered through an online survey targeted at employers.

233 community members participated in the consultation process.

3.1 SCOAR®

The SCOAR® (beginning on the following page) is the summary of the findings from the background research and stakeholder consultation portions of the Regional Workforce Development Strategy.

The **SCOAR® (Strengths, Challenges, Opportunities, Aspirations, Results)** is a detailed analysis of the current situation involving statistical analysis of the local economy, regional competitive outlook, trends and forecasts, investment readiness assessment, strengths/weaknesses/opportunities review using the McSweeney exclusive SCOAR® analysis.

3.1.1 Strengths

- **Supportive ecosystem for the business community:** with healthy business-to-business relationships and local businesses that are resilient and supported by the residents.
- **Oil and gas sector:** provide a very strong anchor sector with high-paying jobs supporting thousands of workers.
- **Sizable working age population between the ages 25 and 59:** a cohort that typically pays higher taxes and therein supports more services.
- **Large indigenous population:** that is home to six First Nations and six Metis communities.
- **Skills in engineering technologies and engineering-related fields; mechanic and repair technologies; construction trades; and transportation and materials moving:** with at least 2% more concentration locally compared to the provincial average, suggesting that there is a lot of knowledge in these sectors in Wood Buffalo.
- **An engaged labour force:** with a higher participation (74.4% compared to 69.0%) and employment rates (70.8%/64.5%), and a lower unemployment rate (4.8%/6.4%) relative to Albert.
- **Growing "family" population with roots in the community:** that is proud of their roots and are working hard to build a diverse economy locally, raising their kids to think of Wood Buffalo as home.
- **Quality of life and incomes:** with only 13% of local households spending 30% or more of their incomes on shelter costs, compared to 21% of Alberta households.
- **A close-knit community:** where residents are supportive and friendly, as shown in the collective response to and support of those struggling after the recent natural disasters.
- **A diverse population:** and home to one of the most diverse populations in Canada, offering a wealth of rich cultural heritage.
- **Affordable housing:** having "one of the few buyers' markets in all of Canada", offering newcomers affordable housing relative to much of the country.
- **Resilient population:** that are able to overcome any challenge, noting how they have rebuilt their community after the recent flood and forest fire.

3.1.2 Challenges

- **Perception of Fort McMurray:** being recognized across Canada as being home to the "oil sands" and not much else.
- **Infrastructure access across the entirety of the Region due to its vast geography:** makes it difficult to provide adequate infrastructure (roads, sewer/water, internet) across the entirety of the municipality.
- **Lack of year-round population:** Although the year-round population is growing, there are still challenges related to a smaller year-round population than larger urban centres (for example, an inability to attract certain professional services, a small labour pool, lack of niche skillsets locally, etc.)
- **Training and apprentice opportunities:** for long-term jobs in the trades.
- **Housing diversity and affordability: some** residents who purchased homes during the previous oil "boom" are struggling to afford their mortgages, with a number of foreclosures in the community. There is also a lack of diverse styles of housing aimed at supporting different income cohorts.
- **Dependency on anchor sectors:** with a lack of diversity in local economic opportunities leaves the community relatively beholden to the ups and downs of the oil sands' economic fortunes.
- **Lack of professional services to support larger population:** (veterinarian, dentists) that residents and potential newcomers.
- **Finding qualified, skilled and suitable workforce locally:** specifically for niche industries or industries that need employees with specific skills (i.e., oil and gas, health care, education) and senior leadership positions.
- **Transient workforce:** as job opportunities are not consistently available for full-time work, many stay for only a short period of time before leaving for other employment opportunities.
- **"Local" jobs do not pay as high as oil and gas jobs, but prevalence of high paying jobs increase costs of amenities in the community:** makes it difficult to compete for workers and cost of living is high.
- **Embracing diversity:** with a segment of the local population reticent to embrace different cultures.
- **Connection to the Indigenous community:** is still limited and disconnected.
- **Lack of affordable childcare:** is a considerable barrier for young families.
- **Employment services:** find it difficult matching employers with potential employees and that this service is lacking in the region. Targeted recruitment firms exist locally, but they are focused on jobs "at camps" and not for lower-paying jobs.
- **Rise in addictions and drug use:** with not enough shelters and counselling services for those in need.

- **Lack of cultural and recreational amenities:** a lack of diversity in options for growing the population.
- **Feelings of isolation**: exacerbated by only having one point of access to the southern part of Alberta and frigid winter weather.

3.1.3 Opportunities

- **Communicating and marketing Fort McMurray Wood Buffalo:** by developing a brand for the broader workforce opportunities that exist locally and marketing the community to a more diverse labour pool.
- **Continuing to build on the quality of life:** by continuing to acknowledge and embrace diversity, expand and recruit professional services and improve public transportation across the entirety of the region.
- **Proximity to oil and gas industry means local workforce can be on the cutting edge of new technology training:** and to take advantage of the AI and technology advances that supports the oil and gas sector.
- **Celebrating and promoting local diversity:** by an abundance of opportunities, whether through quality-of-life enhancements from different cultures, or unique business opportunities to drive economic growth and success.
- **FMWB as a tourism development zone:** take advantage of the Alberta Government's announcement of more than doubling tourism revenues across the province by 2035.
- **A large Indigenous youth population with over 25% of all Indigenous people in Wood Buffalo are under 14:** presents a significant opportunity to support the next generation and overcome local barriers.
- **Diversified training opportunities for gaps in skills:** that can support the local businesses.
- **Attracting youth to the community:** to fill jobs, to live and to play.

3.1.4 Aspirations

The community will:

- Support businesses and not-for-profits across a variety of sectors connect to promote best practices and cross-training.
- Promote local amenities and the local quality of life to people outside of Wood Buffalo.
- Continue to grow as a supportive and flexible community for Indigenous people, newcomers to Canada, and marginalized communities.
- Work with businesses to react to emerging workforce trends and train local residents for the workforce of tomorrow.
- Better connect and support Indigenous youth in developing the technical skills needed to thrive in the local workforce.
- Build strong relationships with each of the First Nation and Metis communities within Wood Buffalo, and promote linkages and the sharing of successful initiatives between each community.

3.1.5 Results

The Regional Municipality (RM) will become known outside of the local community for its strong quality of life and for being a "land of opportunity." While continuing to support the local oil and gas sector, it will also grow other sectors and become known for additional economic opportunities. The RM will be open and inclusive of all members of the local workforce, drawing on shared experiences and building strength through differences.

Rural and Indigenous communities will have better access to economic opportunity through the development of foundational skills, increased outreach, and improved access to businesses and throughout the region.

By increasing connectivity between different industries and organizations, the economic development team will help organizations and leaders tap into already created and utilized best practices, building knowledge across the region. Skillsets within the local labour pool will be enhanced through local retention and training efforts and an increased availability of training programs.

3.2 Major Findings from Survey Data

Employer Survey

To gather robust information specific to different aspects of the area's labour market, separate surveys were conducted for employers and job seekers/employees. **Seventy employers completed the online survey, with an additional 17 phone interviews conducted. An employer specific focus group was also held, with 11 attendees.** The other three focus groups were not employer-specific but did have representation from business owners or managers.

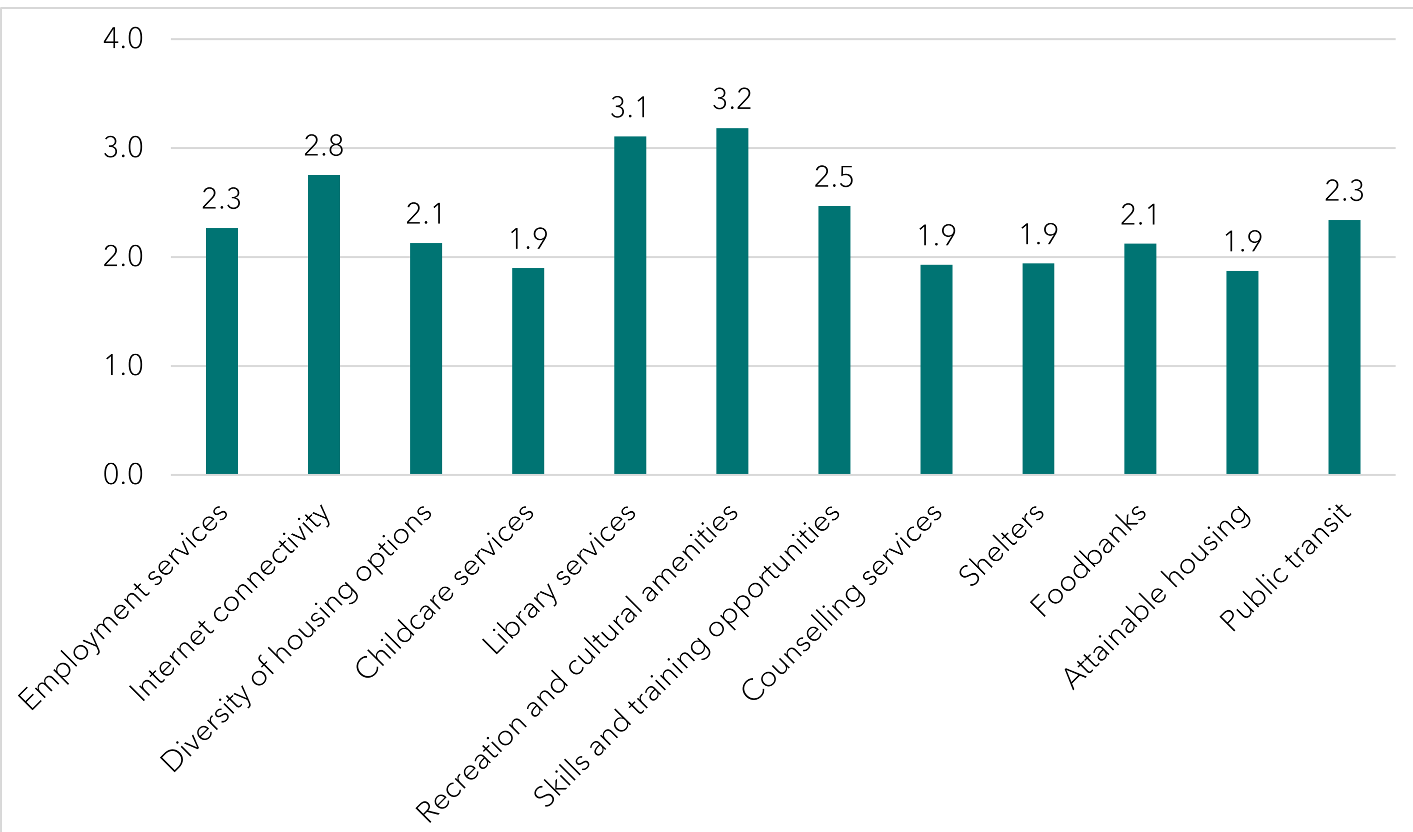
The Employer Survey was designed to identify labour force strengths, but also identify gaps and opportunities in skills, training, and workforce services. The survey was open to all businesses across the Wood Buffalo area. This subsection highlights key findings from the consultative efforts, while Appendix B illustrates a more complete visual representation of the findings from the survey.

- 21% of respondents were operating Indigenous-owned businesses
- 17% of businesses were from the educational services, with 14% of respondents from each of professional, scientific and technical services and the construction sectors.
- Employers who responded were typically medium sized businesses, with 51% of respondents having between 10 and 99 employees.
- Over the past two years, 43% of respondents saw a growth in employment, compared with only 28% seeing a decline in employment figures.
- The factors most responsible for the change (either increase or decrease) in employment were:
    - Change in consumer demand (53%)
    - Change in funding (31%)
    - Employee retention – i.e., employees leaving and unable to be replaced (31%)
- Recruitment of employees is most commonly done online, with 83% of respondents using job search websites and 74% using social media.
- 48% of respondents engage with co-op students in the area, and 39% are willing to take apprentices. Comparatively, 26% of respondents did not make use of any students in training (i.e., apprentices, high school placements).,

- 17% of business respondents are willing to use high school-based trainees, while 13% use external volunteers.
    - Within this dataset:
        - Construction businesses were the most likely to take on apprentices (63% of construction businesses were willing to do so).
        - Mining, quarrying, and oil and gas extraction businesses were most likely to take on high school-based trainees (43% of respondents) speaking to the interconnectedness of those businesses with the local education system.
        - Professional, scientific and technical services (50% of respondents), public administration (50%), and education services (50%) businesses were most likely to support co-op students – likely due to the alignment of education and skills within those sectors.
- For businesses who have had difficulty recruiting or retaining employees, the most common challenges had to do with a lack of people:
    - Lack of candidates with relevant qualifications (44%)
    - Lack of experience among candidates (39%) and
    - Lack of applicants altogether (26%)
    - Other factors were related to community development; undesirable location (20%), community perception (11%) and cost of accommodation (11%) all were noted by more than 10% of respondents.
- The more qualified/skilled a potential employee needed to be the harder businesses found it to be to find qualified individuals:
    - Specifically, while 46% of businesses had no difficulties finding employees for jobs requiring on-the-job training, only 8% had no difficulties finding a person to fill a "professional"-qualified role.
- When asked whether the lack of qualified candidates/number of candidates with relevant skills was a region or industry problem, 2/3rds (66%) of employers focused on the region over their industry.
- Businesses are active in identifying training needs among their staff (63% of respondents do this) and providing this training internally (the same 63% provide training internally). A majority of businesses are also willing to provide training to staff through an external organization (57%).
- However, businesses are less likely to work to develop strategies to address potential loss of staff (only 33% of respondents do this) a potentially troubling note when combined with the fact that 31% of businesses saw a recent decrease in staff due to previously employed individuals leaving their business.

- 61% of respondents were interested in partnering with outside training institutions to develop specific training. Regarding which institutions they might be interested in partnering with, the most consistent responses were:
  - Keyano College
  - CDI College
  - Careers: The Next Generation
  - FuseSocial
- Workforce-supported infrastructure is generally seen as lacking in the community. Respondents were given four options (excellent, good, fair and poor) and when converted to a numeric rating (excellent equalling four and poor equalling one). Only two responses (library services (3.1) and recreation and cultural amenities (3.2)) scored higher than three out of four, with four services (attainable housing, shelters, counselling services, and childcare services) all scoring under two (at 1.9). Figure 16 presents this numeric coding for each workforce-support infrastructure piece.

Figure 16: Workforce-Support Infrastructure Responses Coded Numerically



Skills Development

Finally, businesses were asked their top 3 types of skills/knowledge/qualifications that have been the most difficult to recruit, and what skills they expected to have the most difficulty recruiting into the future. Regarding current skills, three key themes emerged:

Theme 1: Trades & Technical Roles

- Specific roles, such as Boilermakers, Millwrights, Pipefitters, Heavy Duty Mechanics.
- Certifications & Skills, including certified trades, Class 1 licence, technical experience in instrumentation, mechanical trades, and engineering.
- Ticketed trades, including HVAC technicians, structural ironworkers, ticketed insulators, experienced power engineers, and operators.

Theme 2: Professional Roles

- Specific credentialling that is missing in the community included paramedic instructors, CPA (Chartered Professional Accountant), and individuals with a Master's degree or above.
- There was also a strong focus on formal qualifications for professional fields like geologists, technical trades as noted above, and civil engineering technologists.
- A lack of skills in social work-related fields, specifically an ability to work with marginalized people, community engagement, Indigenous cultural awareness, and front-line experience was also mentioned.
- A lack of early childhood educators was flagged as well.
- Finally, the community appeared to be lacking in skills related to administrative roles, project management, general managerial experience and office administration workers.

Theme 3: "Soft" Skills

- Communication skills (both written and oral in English), marketing, fundraising, and program delivery.
- Ability to work under pressure, time management, and general reliability.
- Management and community leadership were broadly mentioned as being lacking in the community as well.

With respect to future needs, most of the analysis was the same as above and can be replicated. Two noteworthy consideration were:

Future Consideration 1: A Continued Rise in Demand for "Soft" Skills

- First, a fear that reliability & commitment will become more difficult to find – having a high emphasis on loyalty, showing up on time, and consistency at the workplace.
- Second, an ability to engage with the community and spark positive interactions.

Future Consideration 2: Skills in Emerging Technologies (IT, automation, and telecommunications)

- A growing focus on IT and telecommunications infrastructure, especially in fields like building automation, security technologies and general IT and automation capabilities.

Job Seeker/Employee Survey

As with employers, specific information was sought from job seekers and employees, to understand the local labour market from the perspective of those seeking or undertaking work. **The online survey received 110 responses from job seekers/employees. A focus group specific to job support organizations was conducted, with nine attendees.** Once again, the other three focus groups were not employer-specific but did have representation from individuals within the labour pool.

As with the Employer Survey, the Employee Survey was designed to gather critical information from employees and jobseekers about their job expectations, needs, and challenges. This subsection again highlights key findings from the consultative efforts, while Appendix C illustrates a more complete rendering of the survey findings.

- 30% of respondents to the survey identified as an Indigenous person.
- 81% of respondents were between the ages of 25 and 54.
- College (38%), Bachelor's (31%), and high school (16%) were the most commonly held highest level of education among respondents.
- At the time of taking the survey, 61% of respondents were employed full-time.
- For respondents who changed jobs over the previous 12 months, the reasoning was generally positive, with 48% due to starting a new position and 39% looking for a new career or opportunity.
- 42% of respondents who had changed jobs were due to less positive reasons, including downsizing, a lack of job stability, or a lack of funding for their position.
- Reasons for staying at their current position were most consistently related to non-financial reasons:
    - *Supportive management* was a main reason for 76% of respondents.
    - *Benefits* (vacation, sick leave) and *career growth and learning and development* were both noted by 73% of respondents.
    - *Job stability* and *being recognized valued and respected* were each selected by 65% of respondents.
    - Of course, financial incentives are still valuable of course, with 73% of respondents seeing this as a very important reason to remain at their place of employment.
- The most common barriers to employment (both finding and keeping meaningful work) were a lack of available postings and lack of existence of well-paying jobs. This, when coupled with results from the employer survey noting a lack of applicants, suggests that there is a skills mismatch for a portion of the population.
    - Expectedly, given the previous findings and the possibility of a skills mismatch between employers and the labour pool, those who had lower

levels of education and qualifications found it more difficult to find relevant job postings.

- Services most commonly flagged as needed by respondents were access to training, getting information about skills/careers in demand, counselling or mentorships, and worker and employer matching.
- One out of four (25%) of respondents were worried that their job or current skills set could be automated, with 75% having no concerns.
- 46% of respondents felt that learning new skills for their current employment industry/occupation would be helpful.
- 28% of respondents felt that learning new skills for a new industry/occupation with demand for labour would be ideal.

Field of Expertise

Respondents were asked their field of expertise. Respondents' answers have been summarized in the Word Cloud below.

4. Conclusions: Emerging Themes

The following themes have been derived through a rigorous process that included a thorough study of the Region including a document review, data analysis and stakeholder consultations.

The following strategic themes emerged as areas of focus through the work done in building this labour market needs assessment. They reflect the gaps and opportunities that were consistently noted during phase one of the project and will be used for discussion purposes when building out the final Strategy through phase two. Each theme is discussed on the following pages, with an explanation of why it is important, as well as discussion questions that will be used to facilitate the remainder of the consultative engagements.

Following the development of this Labour Market Needs Assessment, a Working Session will take place in November 2024 that uses the questions and themes below to transition from general concepts and gaps/opportunities, to identifying clear coherent actions that allow for the Regional Municipality to address challenges and take advantage of opportunities in supporting the local workforce.

The strategic themes are:

Theme 1	Theme 2	Theme 3	Theme 4
Attracting and Retaining Labour.	Rural and Indigenous Outreach.	Building Local Capacity Through Training.	Developing Community Connections.

Theme 1: Attracting and Retaining Labour

Attracting talent to the area is a challenge, for businesses in a variety of industries across the municipality. Not only is the Region competing against other areas locally and globally, but local industry is competing with other local industries vying for the same talent.

- Locals are proud of the community in Fort McMurray but are frustrated that the area's reputation is still as just a "fly-in, fly-out oil and gas community." How can this perception be changed to encourage more people to move to the area?
- What tangible actions can be done to highlight the positive attributes that the Regional Municipality has to offer?
- Once people have come to Fort McMurray Wood Buffalo for work, how do you keep them?
- What actions could be taken to keep youth (under 25) in the Region or to attract young families?
- What actions are required to create public awareness of local industries, future careers and career pathways available in Fort McMurray Wood Buffalo?
- What actions could be taken to support newcomers to the Country and area and encourage them to remain in the Regional Municipality?
- What community investment or businesses are required that will help to keep talent in the area (e.g., daycare, sidewalks, etc.)?

Theme 2: Rural and Indigenous Outreach

The Fort McMurray Wood Buffalo area is home to 12 First Nations and Métis communities. These communities are foundational to local prosperity, but their remoteness can make it exceptionally difficult for members to engage with the economy. Moreover, a persistence of foundational gaps (i.e., a lack of a driver's license) has presented challenges for the population.

- What actions could be taken to address some of the infrastructure gaps to allow for engagement in these more rural and Indigenous communities?
- How can local employers and government agencies better connect with youth in rural and Indigenous communities to promote unique and innovative careers?
- How can the Regional Labour Market Committee support inter-community connectivity, to promote best practices and share success stories?
- What training programs are needed to grow local capacity?
    - How can the Regional Labour Market Committee champion these training programs and support uptake?

Theme 3: Building Local Capacity Through Training

Training and skills development in the local population can take a variety of forms. Certain "hard skills" (i.e., technical skills needed for specific positions) are missing from the local workforce. As well, changing dynamics in the workforce (computerization and AI, work-from-home) suggest that new skills will be needed for much of the current labour pool within the next decade.

Finally, the local population's diversity is a noted strength, however during consultations it was discussed that often community and business leaders need more training in embracing people from marginalized communities.

- How can businesses be encouraged to promote the hiring and training of local residents more frequently, rather than looking outside the regional municipality to fill their workforce needs?
- How can businesses be encouraged to promote the hiring and training of more local **youth**?
- Consultations made clear that there are a number of specific skillsets in need in the region, including welders, heavy equipment technicians, childcare workers, and general trades contractors. How can the Regional Labour Market Committee help with the recruitment and attraction of these (and other relevant) specific skills?
- How can community and business leaders engage better with newcomers to the community, Indigenous people, the LGBTQ+ community, etc.? What is needed to develop this skillset among local leaders?
- How can the Regional Labour Market Committee work with employers, Keyano College, and the local labour pool to address the potential new skills needed in the local workforce over the next decade?

Theme 4: Developing Community Connections

Continuing to build a connected community across sectors, community groups, and businesses through collaboration will help to attract and retain talent. Developing, maintaining, and finding new working relationships will enable the community to be better integrated and to help local business with the attraction and retention of talent.

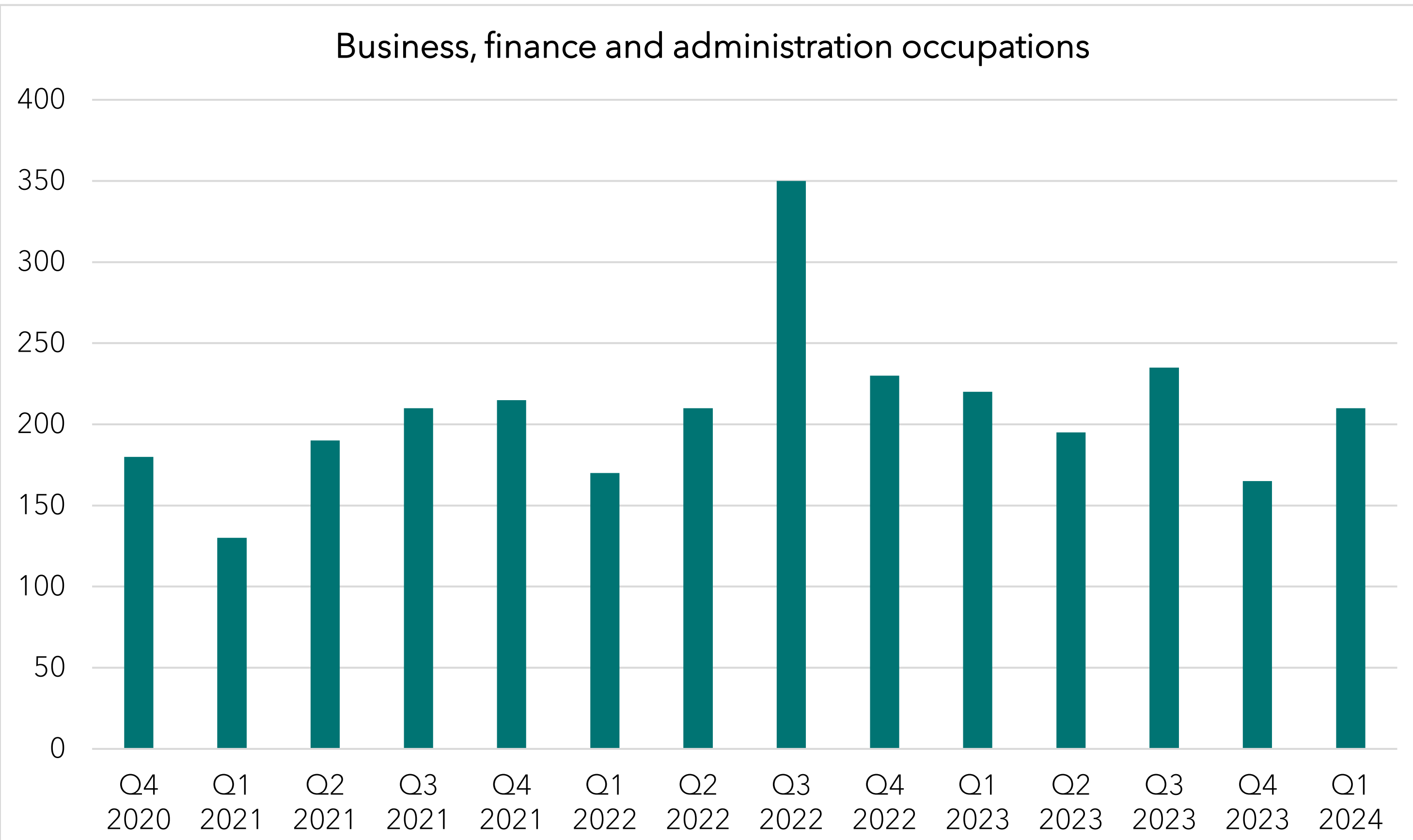
During previous consultations, a realization occurred multiple times that certain organizations had defined best practices or had created protocols and strategies that were unknown within the broader community but that would be beneficial to many. Bridging this informational divide would help grow skills and knowledge across the region, breaking down current barriers and gaps.

- How can employers engage with high school and post-secondary students to showcase local opportunities? What actions could be taken to create better partnerships with local schools (secondary and post secondary)?
- What actions could be taken to connect local not-for-profits with employers?
- What actions could be taken to connect local businesses with one another, to share best practices and growth opportunities?
- How can the Regional Labour Market Committee partner with local businesses, organizations, and Keyano College to improve training opportunities locally?

Appendix A: Job Vacancies By One Digit NOC Occupations

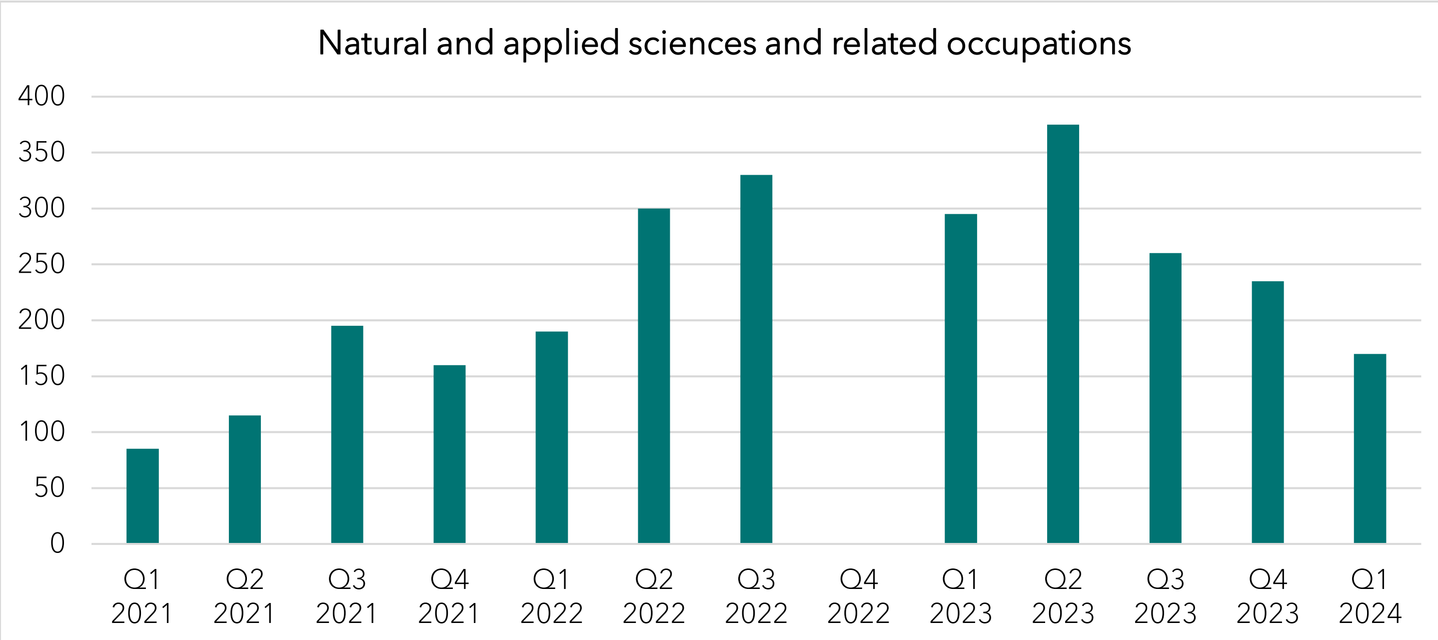
This appendix presents job vacancy data for all one-digit NOC occupations with reliable data, for Census Division 16. Timeframes with unreliable (or no) data are left blank (for example, see Q4 2022, Figure 18).

Figure 17: Job Vacancies, Census Division 16, Business finance and administration occupations, 2020-2024



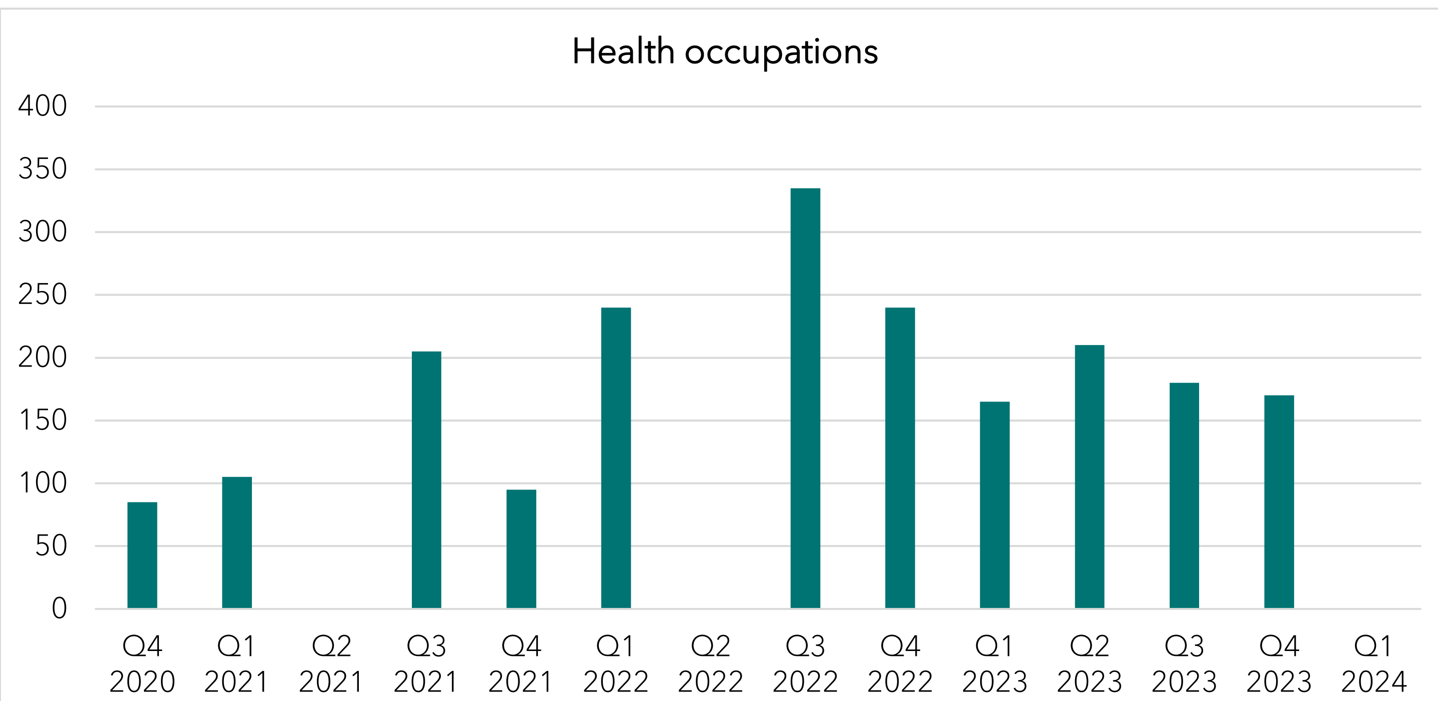
Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries.

Figure 18: Job Vacancies, Census Division 16, Natural and applied sciences and related occupations, 2020-2024



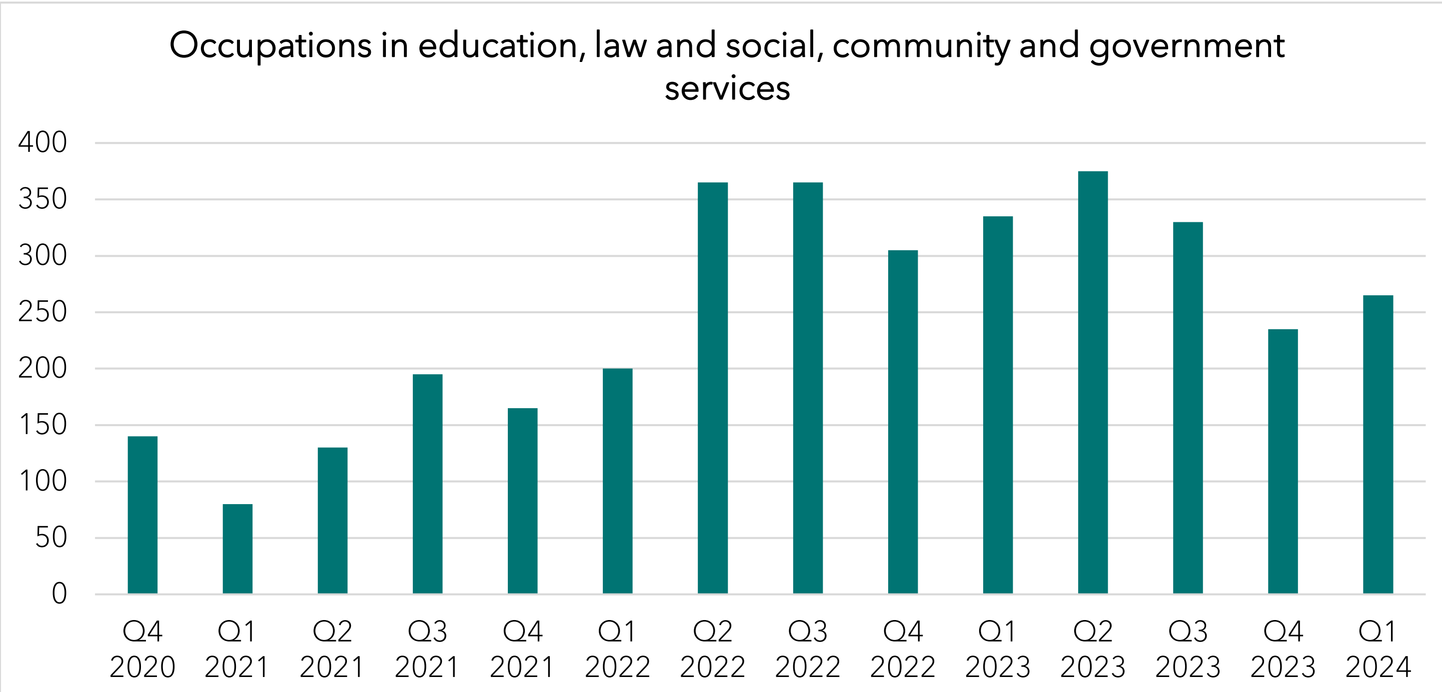
Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries.

Figure 19: Job Vacancies, Census Division 16, Health occupations, 2020-2024



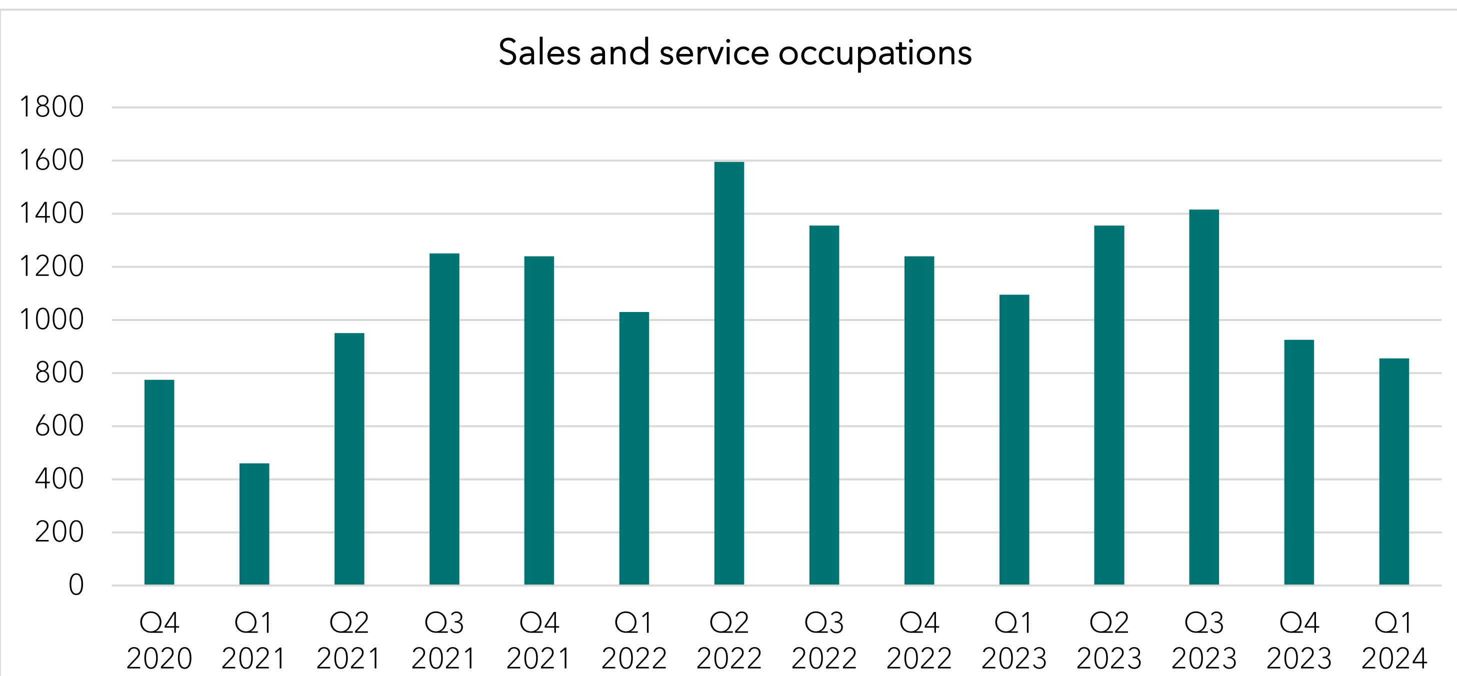
Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries.

Figure 20: Job Vacancies, Census Division 16, Occupations in education, law and social, community and government services, 2020-2024



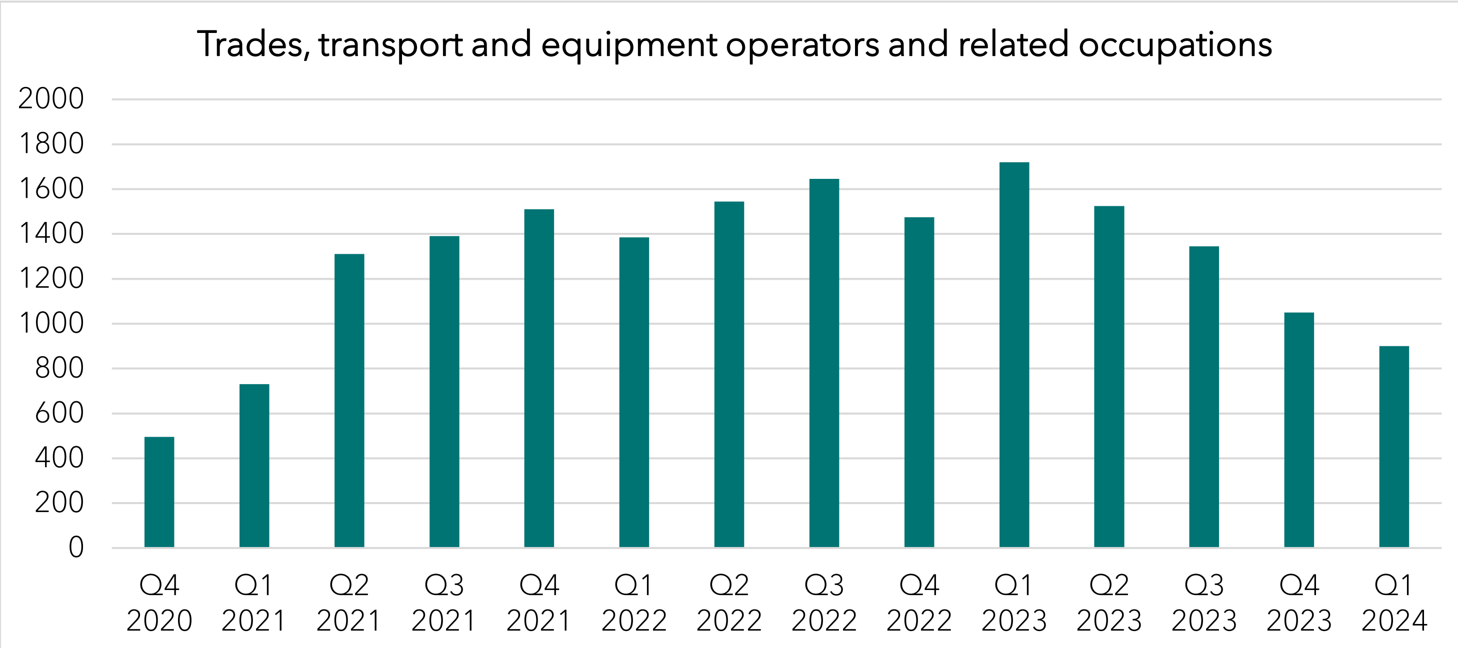
Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries.

Figure 21: Job Vacancies, Census Division 16, Sales and service occupations, 2020-2024



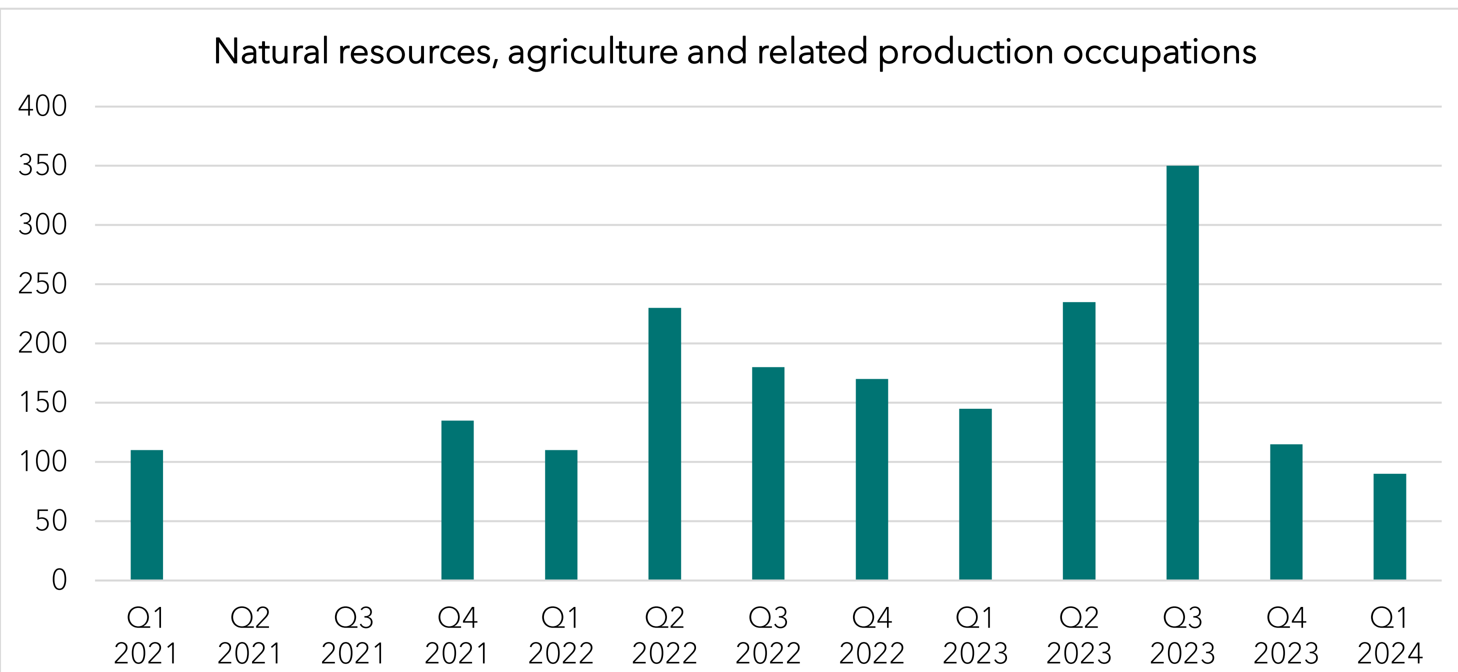
Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries.

Figure 22: Job Vacancies, Census Division 16, Trades, transport and equipment operators and related occupations, 2020-2024



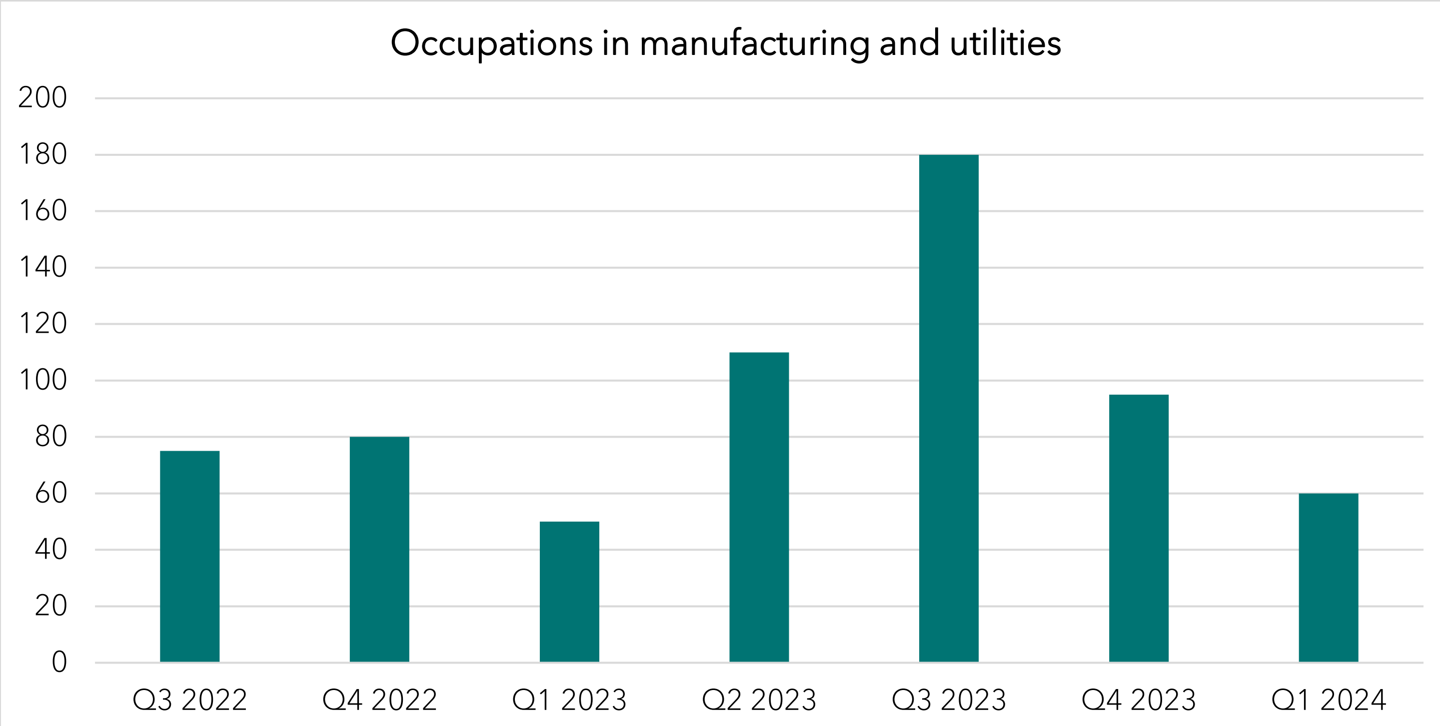
Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries.

Figure 23: Job Vacancies, Census Division 16, Natural resources, agriculture and related production occupations, 2020-2024



Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries.

Figure 24: Job Vacancies, Census Division 16, Occupations in manufacturing and utilities, 2020-2024



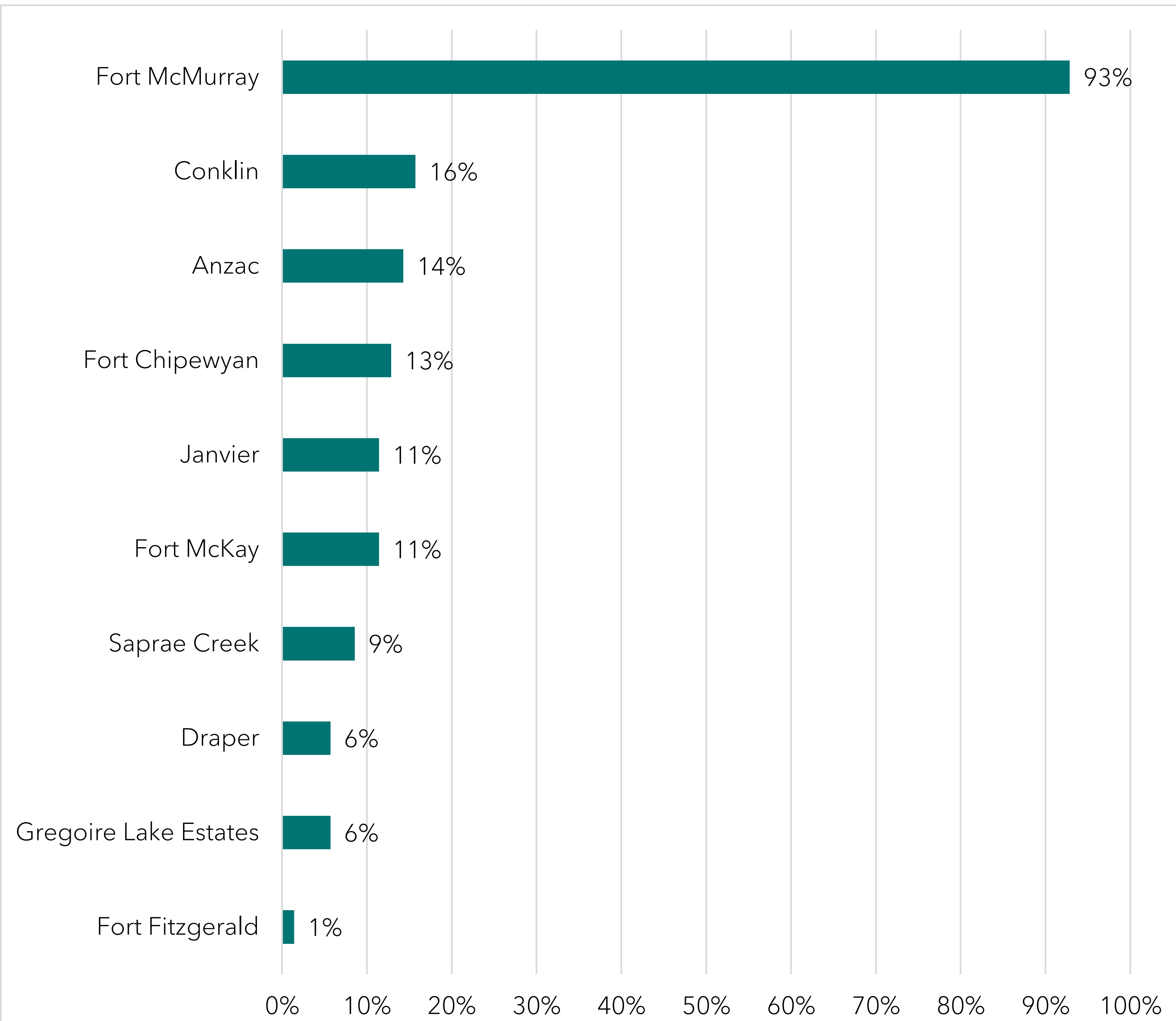
Source: Statistics Canada. Table 17-10-0140-01 Components of population change by census division, 2021 boundaries.

Appendix B: Survey Responses, Employers

Firmographics

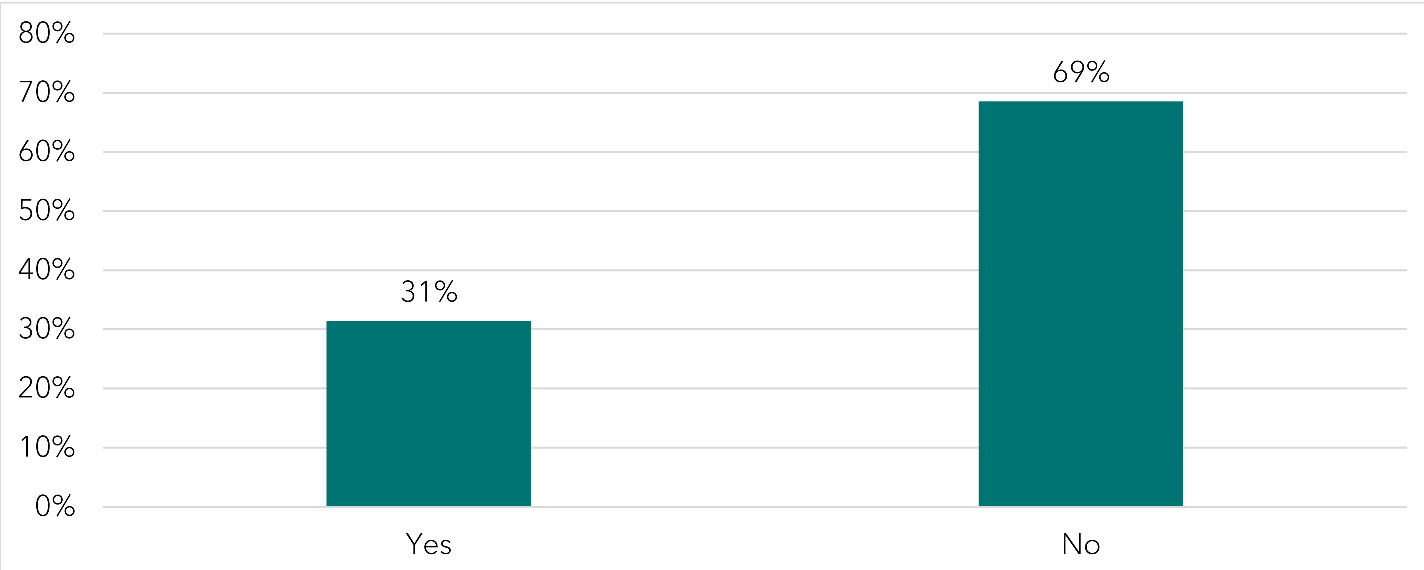
The vast majority of businesses who responded were from the Fort McMurray area (93% of respondents). Those who responded "other" were outside the region but provided services within Wood Buffalo. Respondents could check more than one option, so the percentage totals sum to over 100%.

Figure 25: Where is your Business Operating?



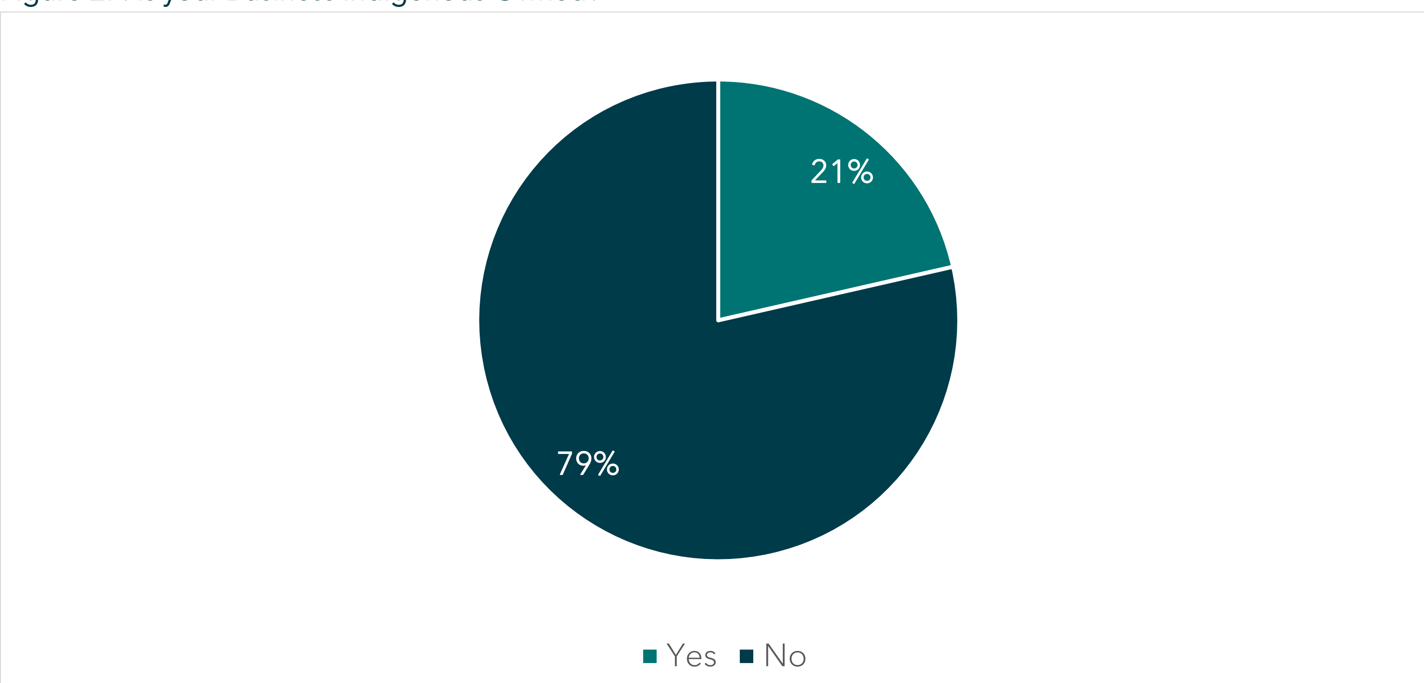
With respect to businesses' non-profit status, 31% of respondents stated they were non-profits compared to 69% of for-profit businesses.

Figure 26: Please Specify if your Organization is a Non-Profit.



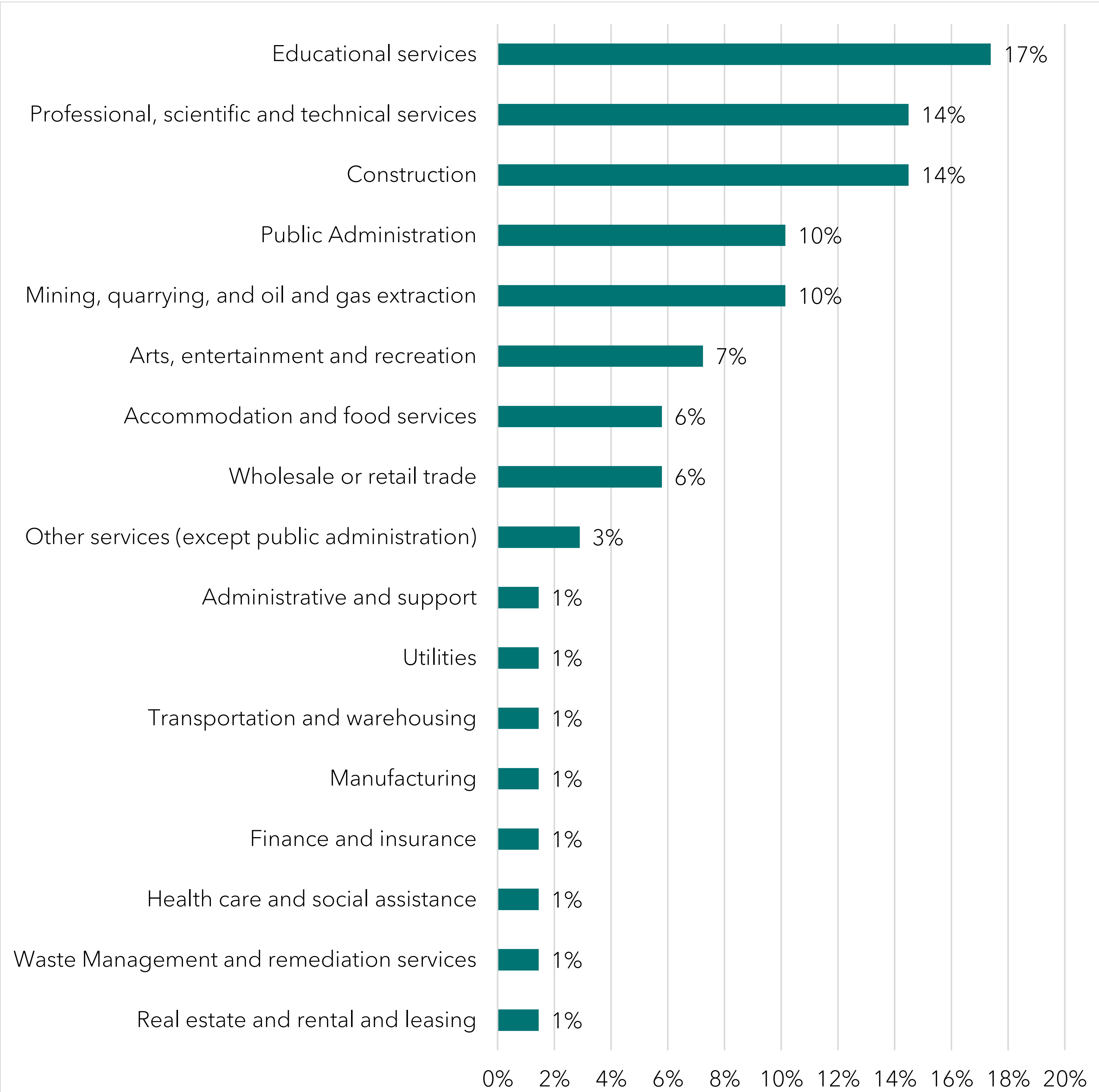
One out of five respondents (21%) reported their business as Indigenous-owned.

Figure 27: Is your Business Indigenous Owned?



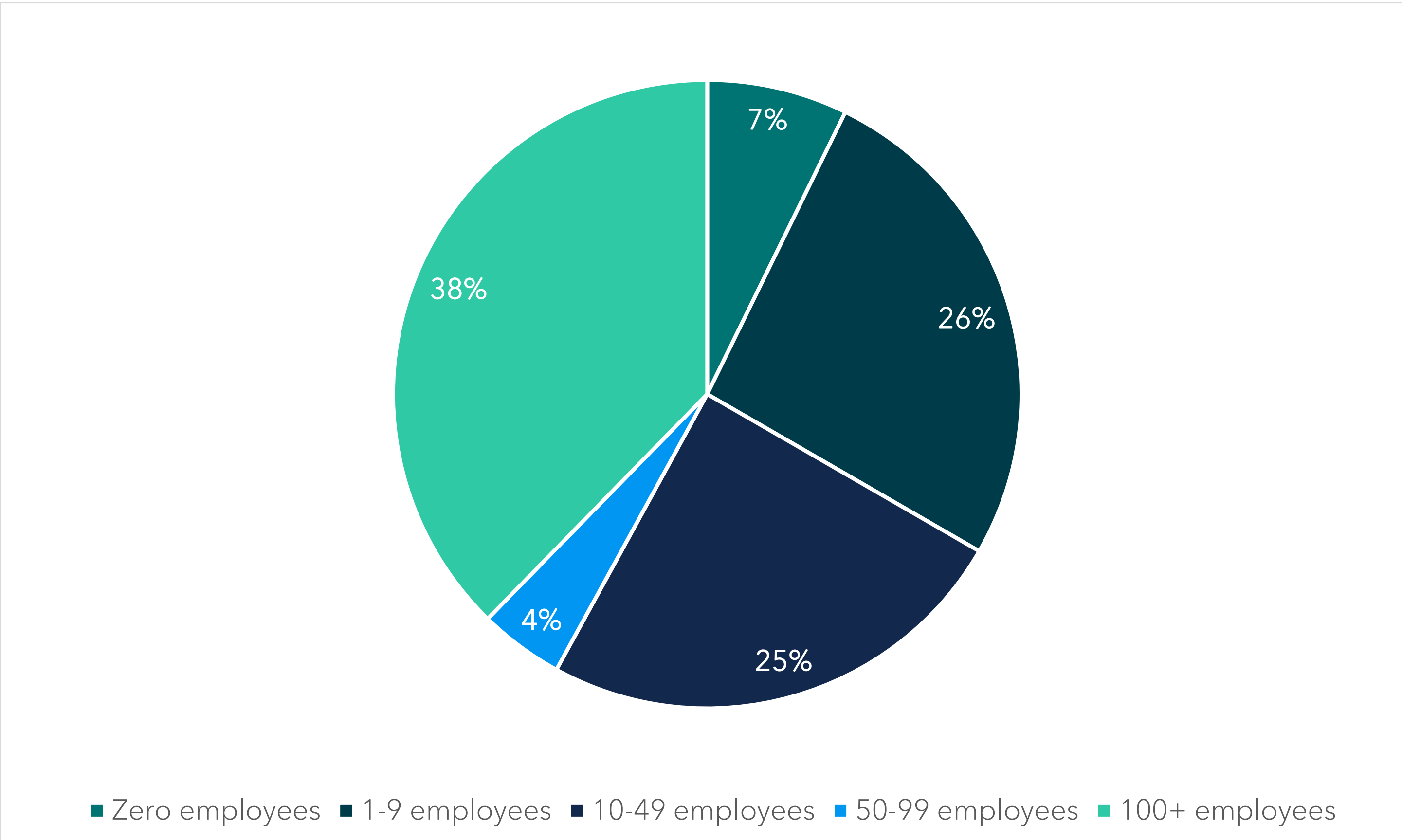
Regarding the sector that best describes their business operations, the most common responses were "educational services," "professional, scientific and technical services," and construction.

Figure 28: Which Industry Sector Best Describes your Business Operations?



With respect to the size of respondents' businesses, approximately one-quarter (26%) were small businesses (one to nine employees), a quarter (25%) were medium (10-49 employees), and two-fifths (38%) were very large (100+ employees). Employment totals were based on full-time equivalent staff. For example, if **two** employees work 20 hours part-time a week for a year, that equals **one** full-time equivalent job.

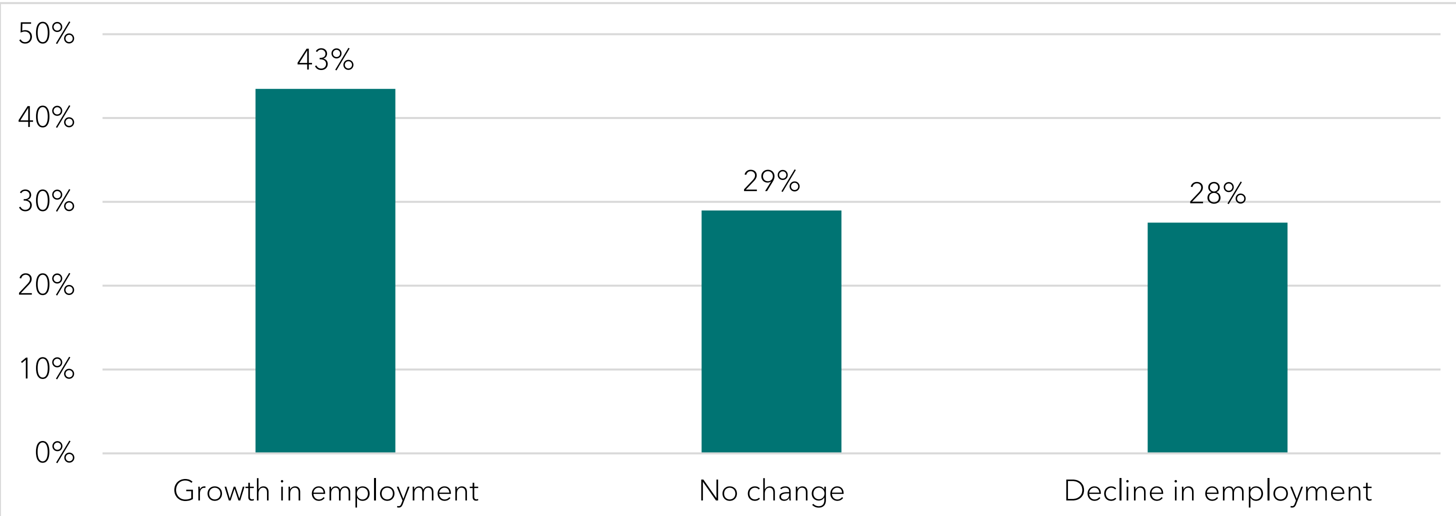
Figure 29: On an Annual Basis, Approximately how many Full-Time Equivalent Staff do you Employ?



Changes in Employment

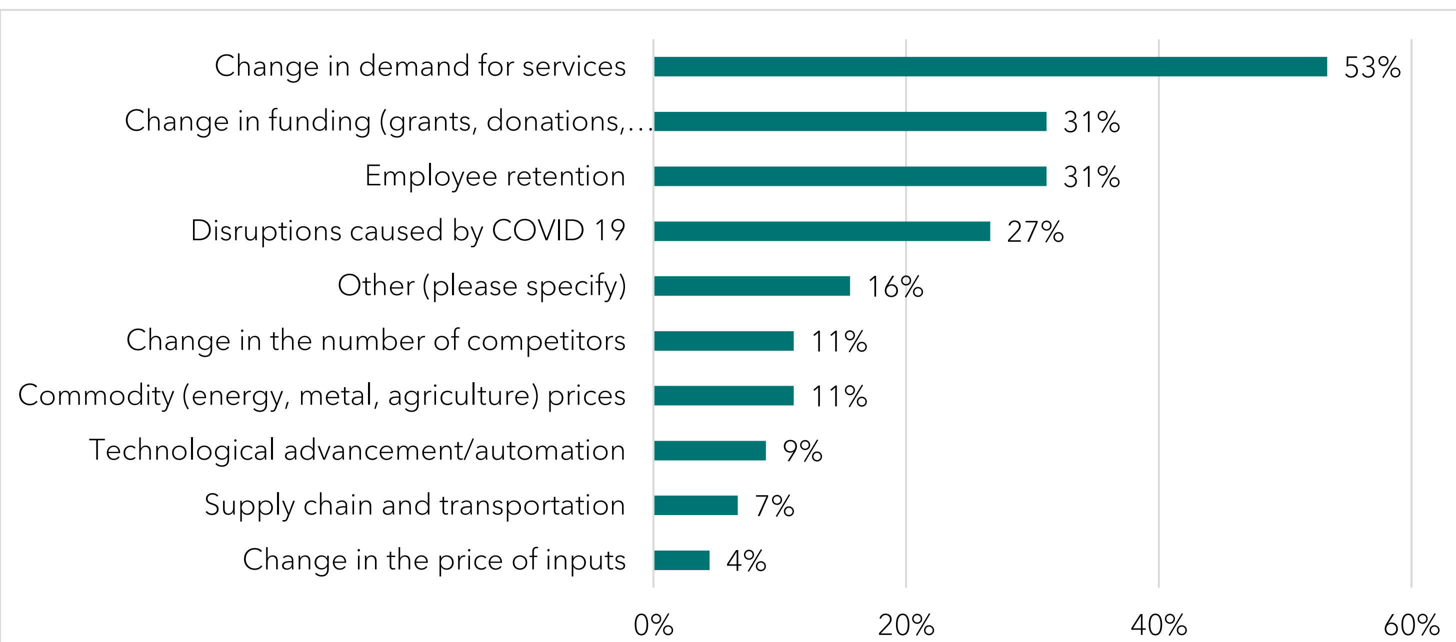
When asked whether they had seen a change in employment over the last two years, employers were most likely to have seen a growth in employment, although responses were fairly evenly distributed between employment growth, decline, or seeing no change.

Figure 30: Over the Past TWO Years, has your Company Experienced a Change in the Level of Employment?



When asked what factors impacted this change, those who had seen changes were most likely to report a change in demand or funding. Respondents could check more than one option, so the percentage totals sum to over 100%.

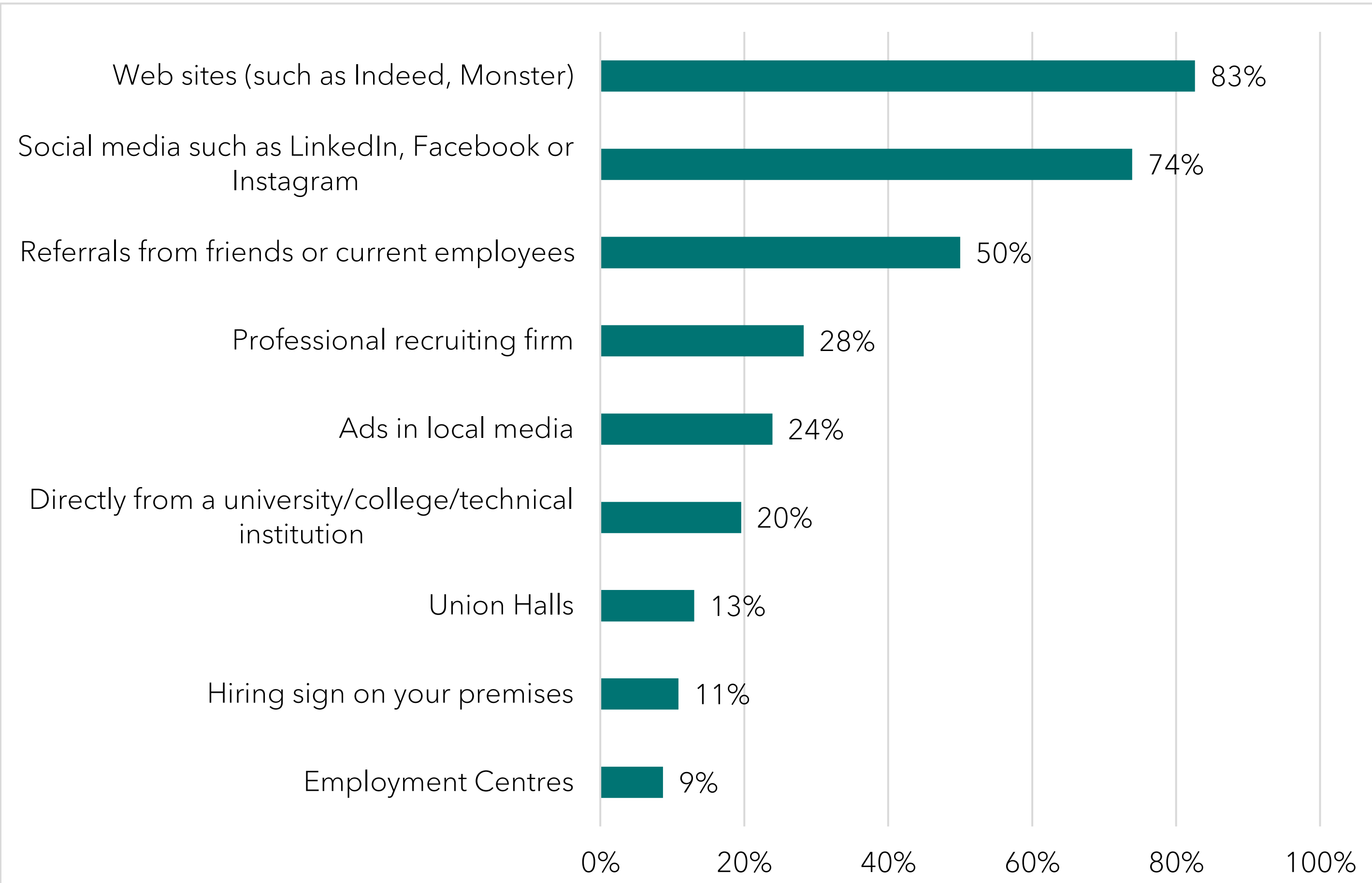
Figure 31: What Factors are Responsible for this Change?



Recruitment

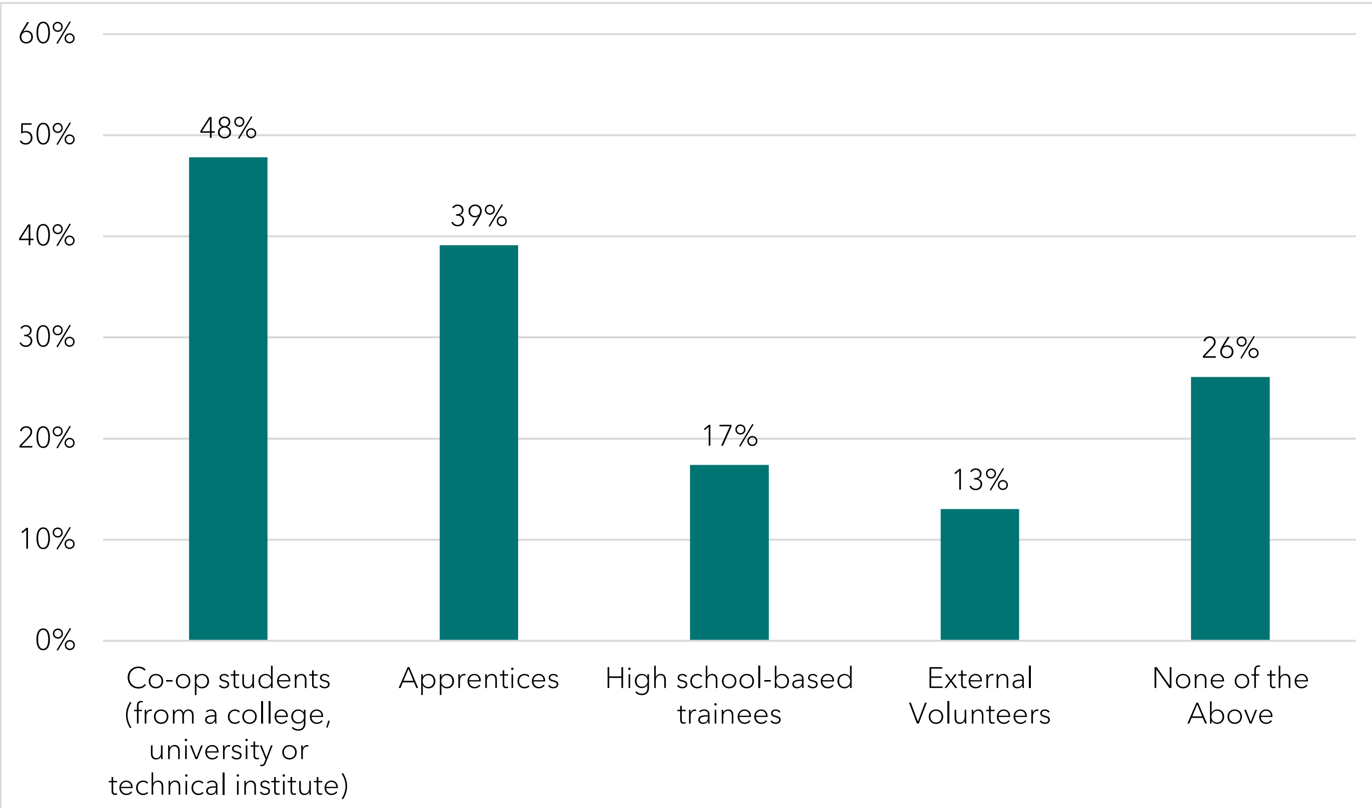
When recruiting new employees, the vast majority of businesses use web sites (whether formal recruitment sites such as Indeed, or social media sites such as LinkedIn or Facebook). Respondents could check more than one option, so the percentage totals sum to over 100%.

Figure 32: How do you Currently Recruit Employees?



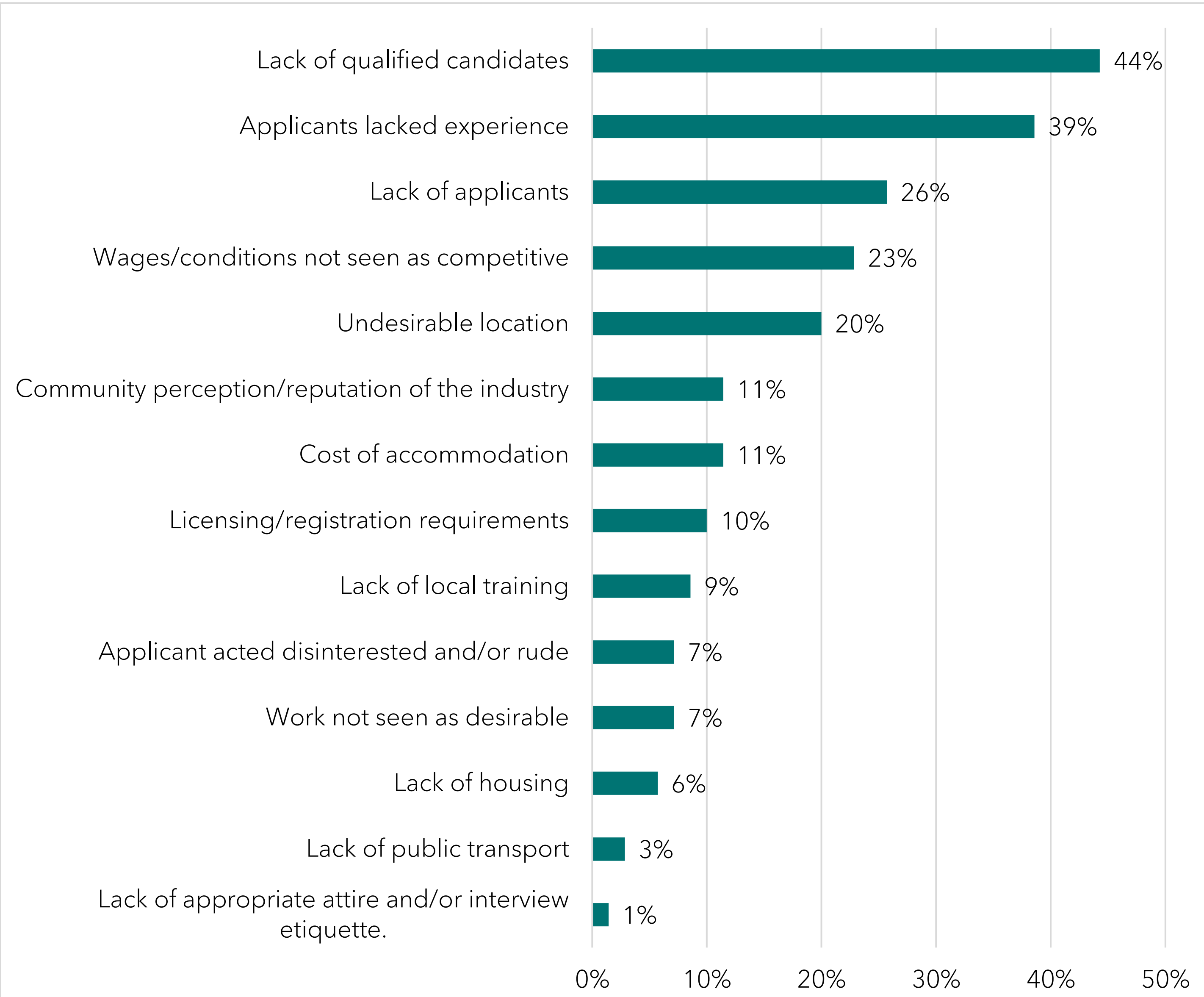
Regarding training the next generation of workers, nearly half (48%) of businesses surveyed noted they employ or engage with co-op students, while 39% work with apprentices. Over a quarter of respondents (26%) did not engage with any trainees. Respondents could check more than one option, so the percentage totals sum to over 100%.

Figure 33: Does your Business Engage/Employ any of the Following?



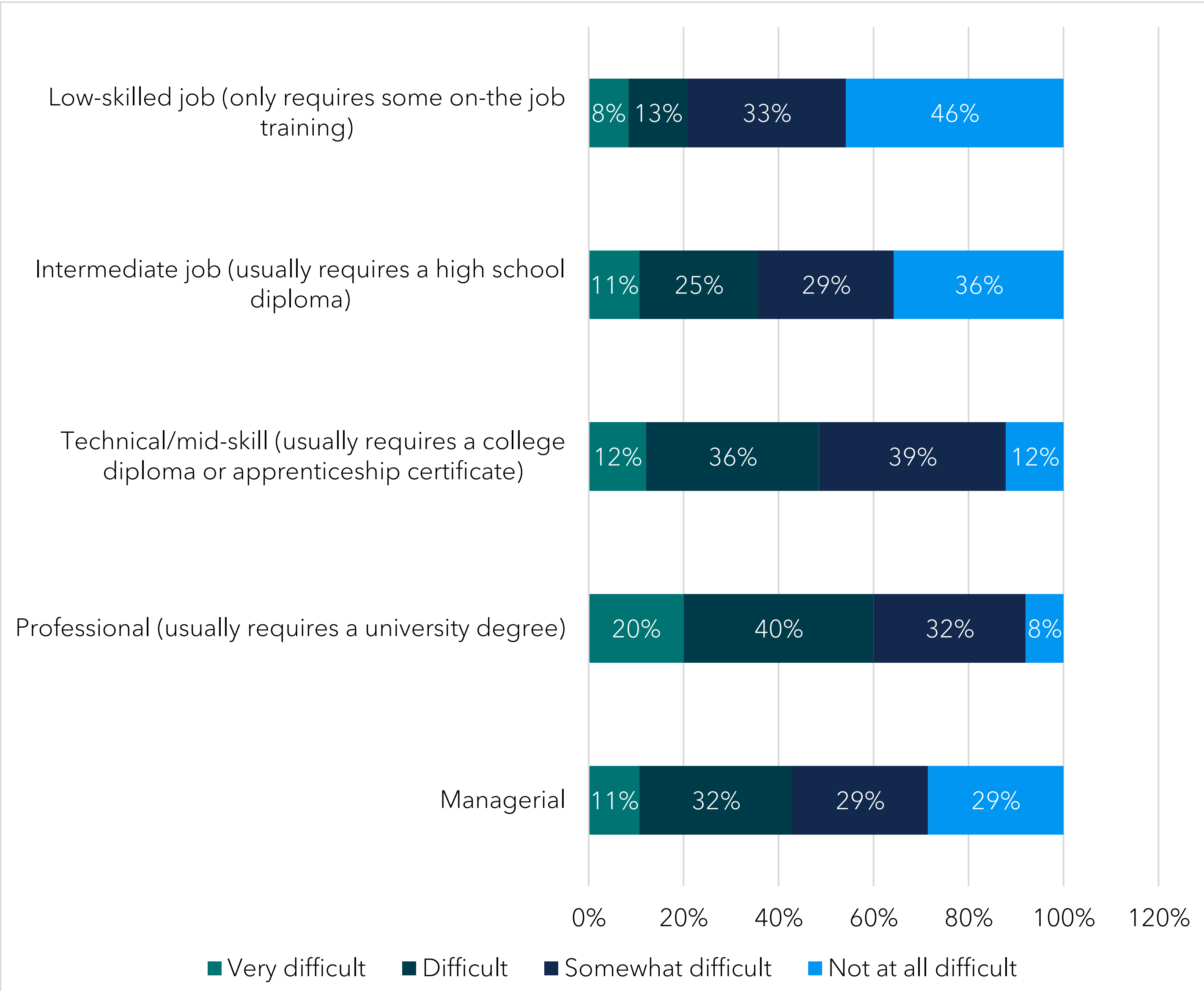
When asked whether their business has difficulty recruiting or retaining employees, the most consistent responses were due to a lack of candidates, experience, or qualifications among the labour pool. Respondents could check more than one option, so the percentage totals sum to over 100%.

Figure 34: Did you have Difficulty Recruiting or Retaining Employees for any of the Following Reasons?



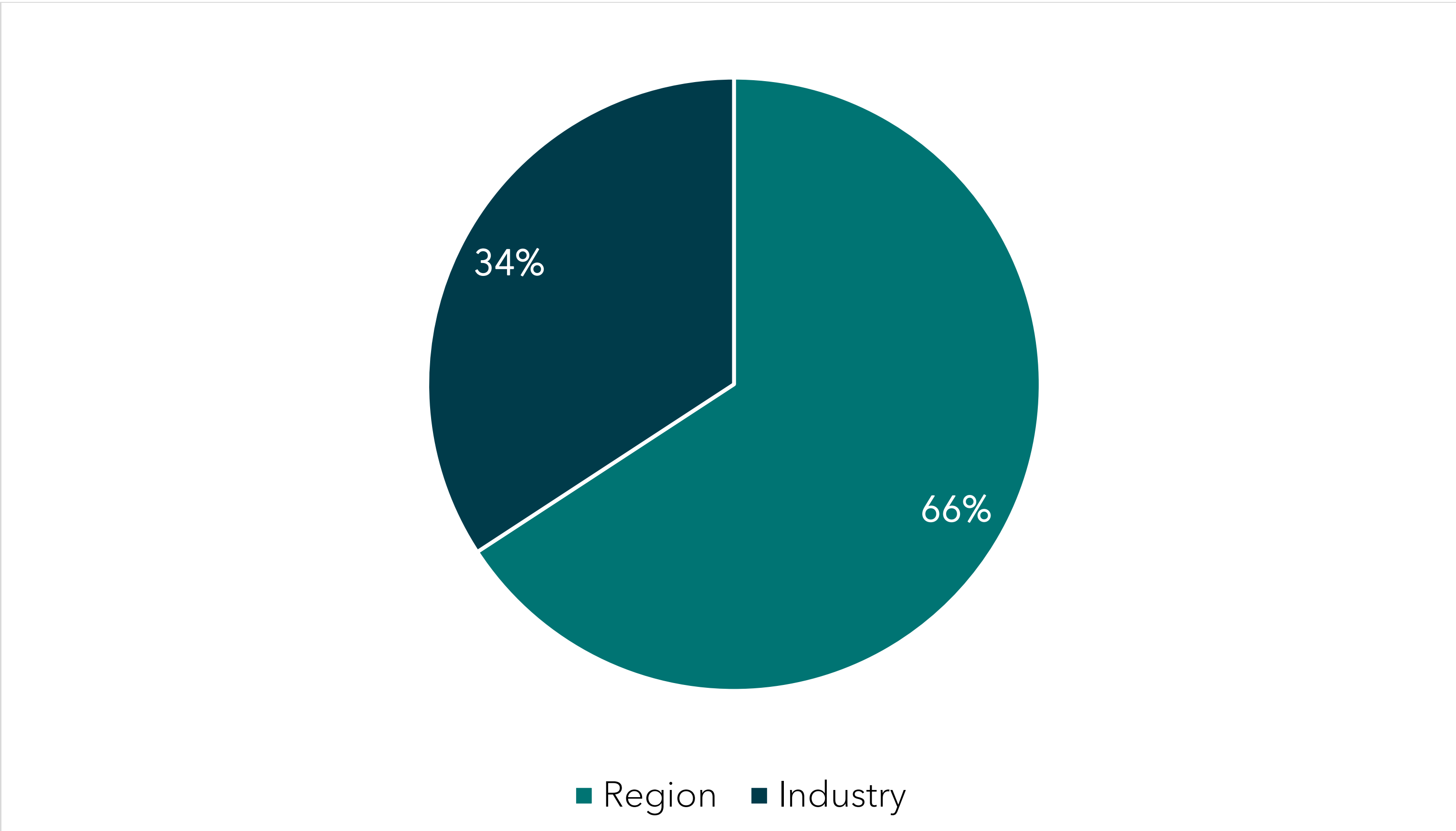
Responses showed that the more qualifications needed for a position, the more difficulty businesses had finding a suitable candidate.

Figure 35: Over the Past THREE Years, how Difficult has it been for you to Recruit for the Following Job Categories?



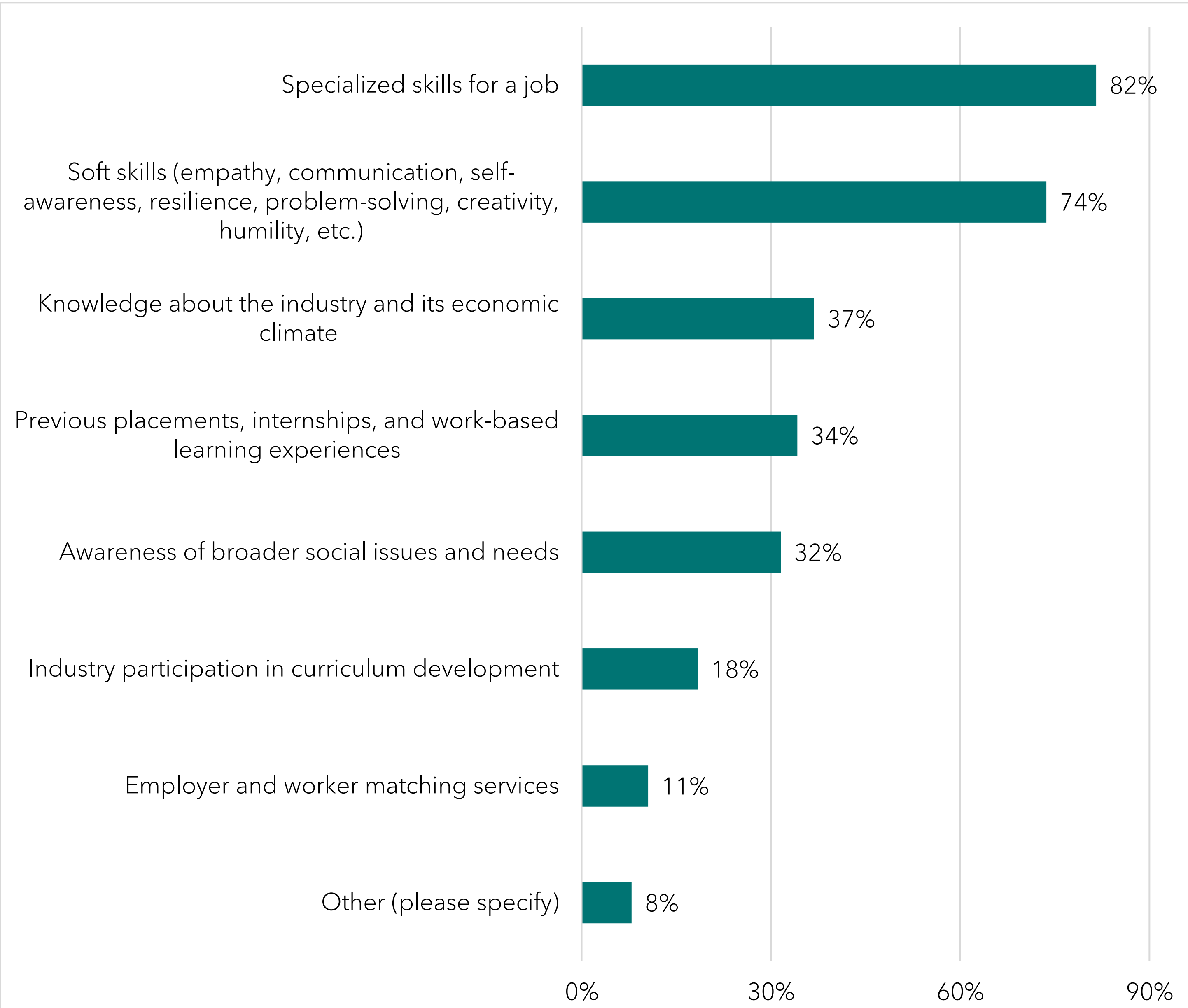
When asked whether the challenge in finding candidates with relevant skills was specific to the region or industry, two-thirds of respondents noted it was more regional than industry-specific. Explanatory comments noted that a lack of youth wanting to remain in the region, the region's reputation as a fly-in, fly-out community, and the isolation of many local communities makes training and skills development a considerable challenge.

Figure 36: Are the Challenges you Noted Specific to the Region OR your Industry?



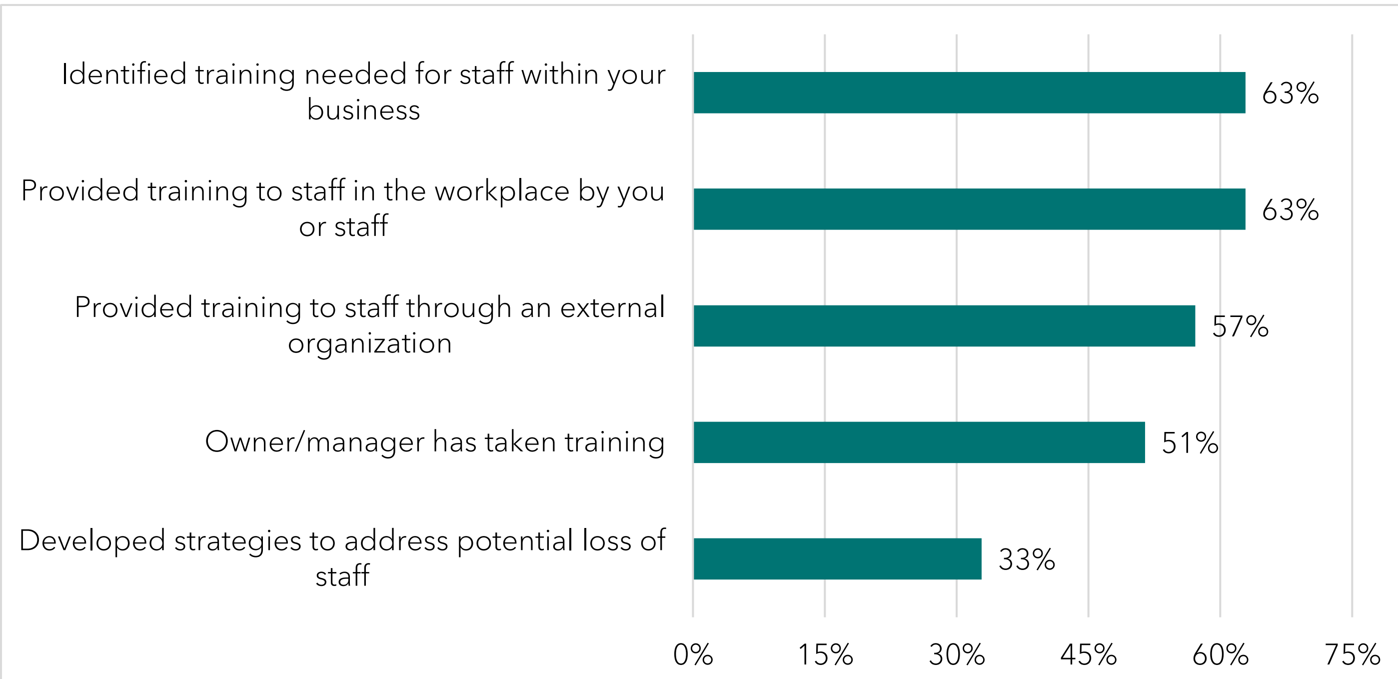
Building off of the previous question, businesses were asked the most important factors for employment success for new graduates. While a host of issues were discussed, the two most important factors were clearly technical skills and soft skills, echoing the sentiments above.

Figure 37: In your Industry, what are the Most Important Factors for Employment Success for Graduates upon Entering the Workforce?



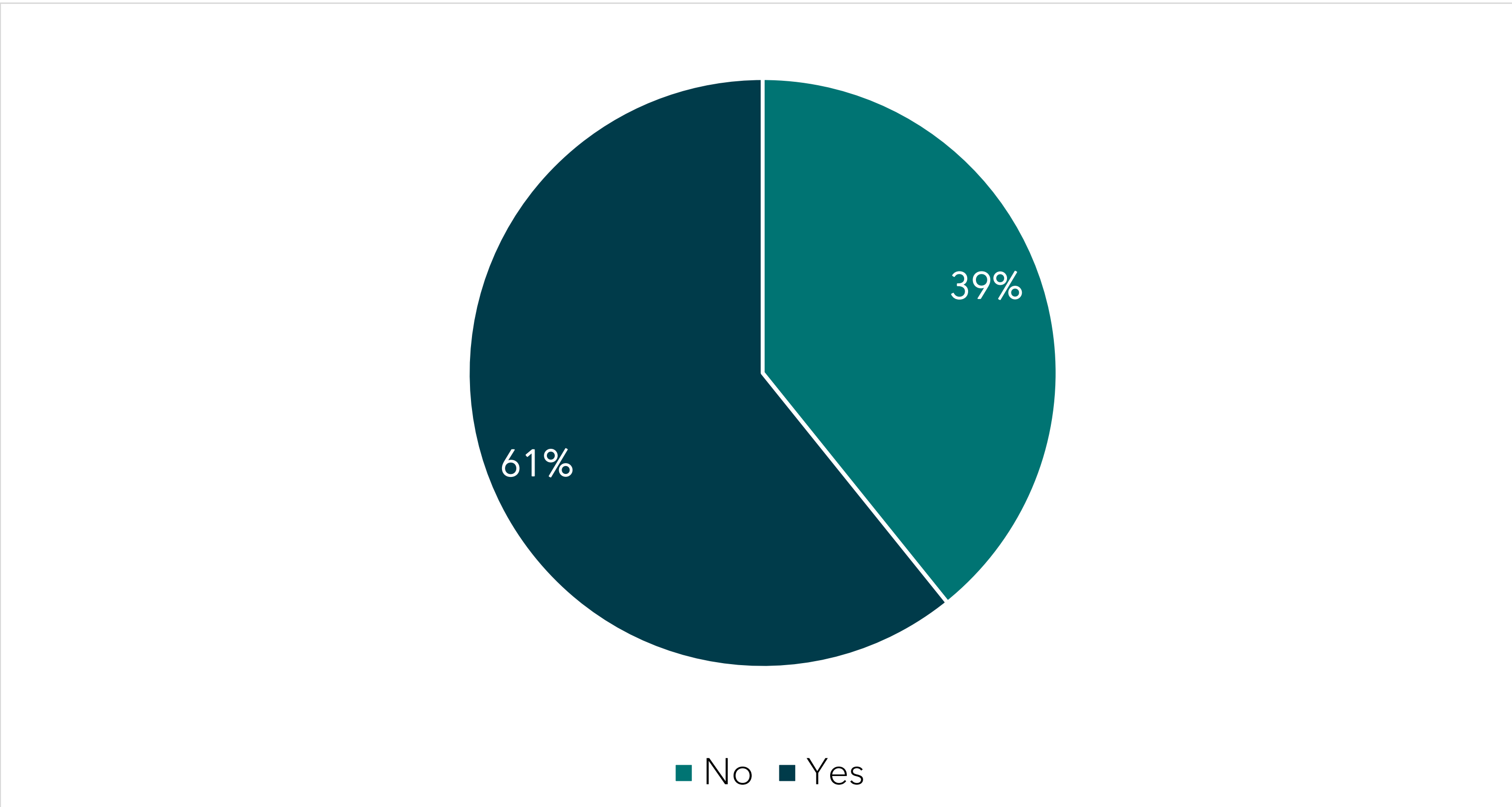
Regarding skills development within their own workforce, 63% of respondents stated that they identified training needs within staff, and similarly provided training to staff internally. While internal training uptake has been strong, less consistent was developing strategies to address potential loss of staff, with only one-third of all respondents noting they had done this (33%).

Figure 38: In the Past THREE Years has your Business Undertaken any of the Following Activities?



When asked whether their business would be willing to partner with a training institution to develop specific training, 61% of respondents stated they would be interested in doing so.

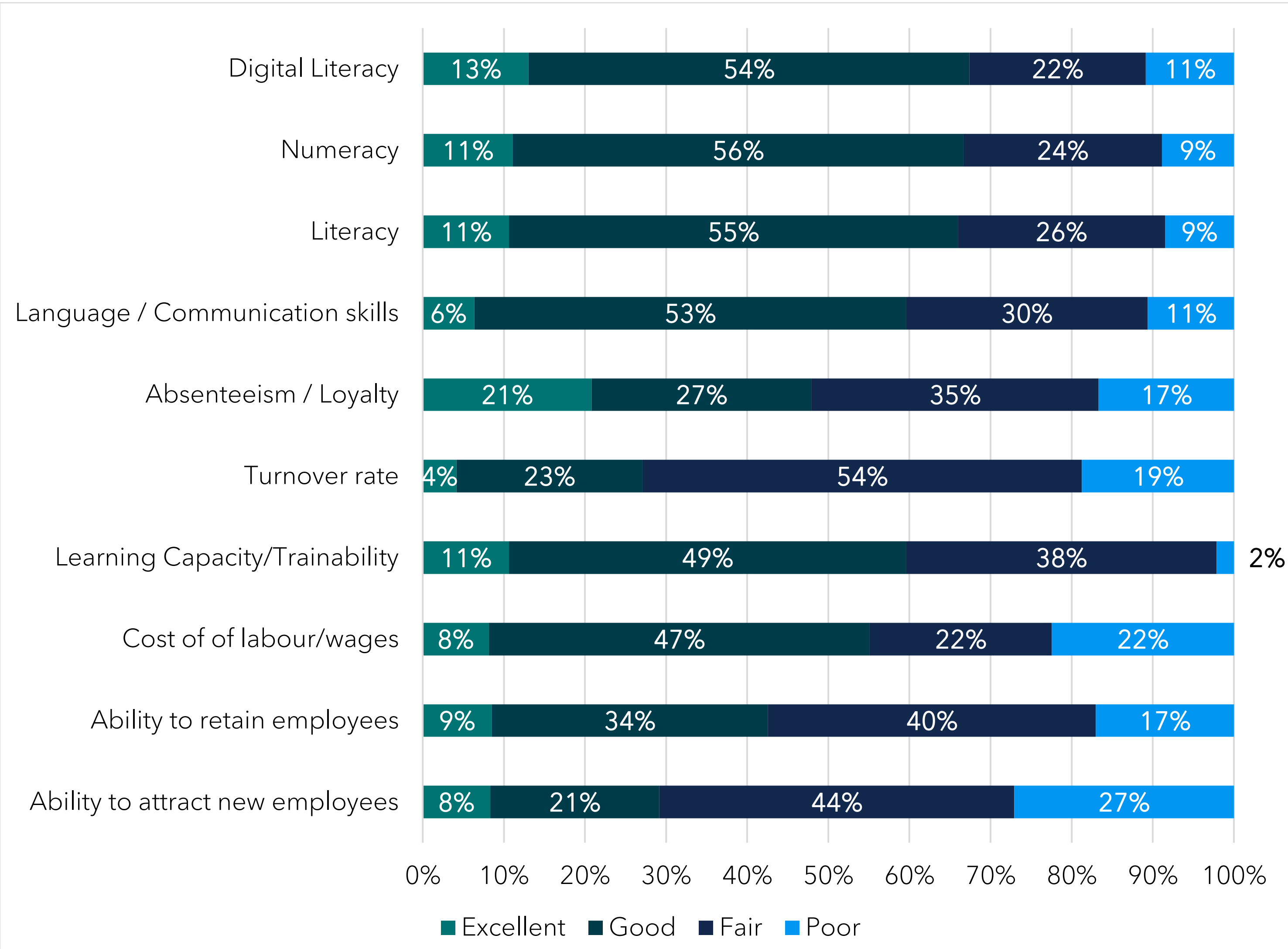
Figure 39 Would you be willing to partner with a training institution to develop the skills that you require? If so, which institution?



Community Factors

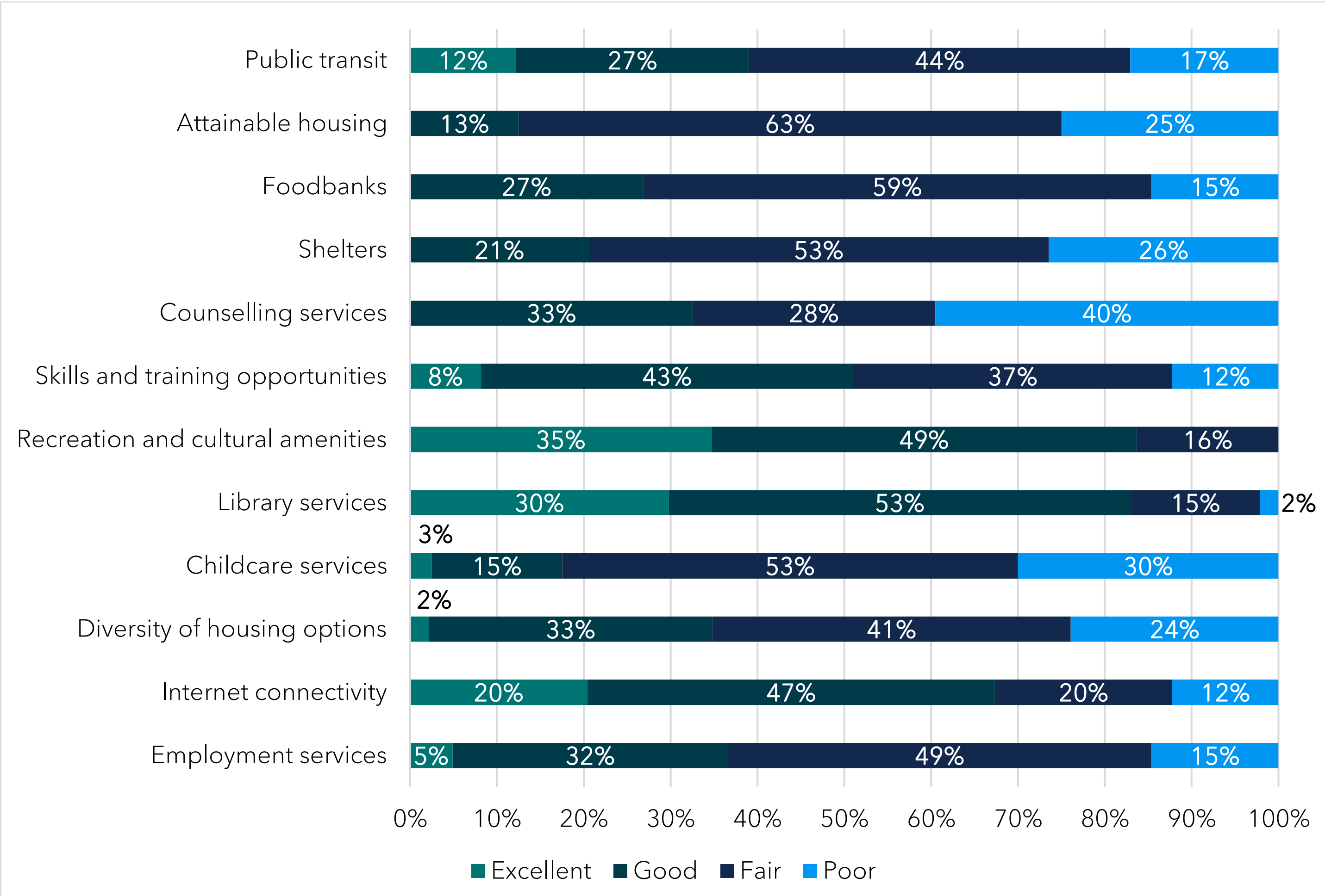
The final two questions in the employer survey focused on workforce factors and supports across the entire of the Regional Municipality. The first question asked respondents to rate a variety of workforce factors and basic skills across the RM, relative to business needs. While relatively few specific factors were consistently rated "poor" (only the ability to attract new employees, at 27%, was above 25%), relatively few specific factors consistently rated as "excellent" (only loyalty rated above 20%, at 21%). Generally, factors were most often considered middling, rating as either "good" or "fair."

Figure 40: How Would you Rate the Following Workforce Factors in your Community, Based on your Business Needs?



The second question was focused on the community infrastructure, rather than the existing workforce. Responses to this question made clear that workforce-support infrastructure is generally seen as lacking in the community.

Figure 41: How would you rate the following infrastructure supporting the workforce in the Regional Municipality of Wood Buffalo?

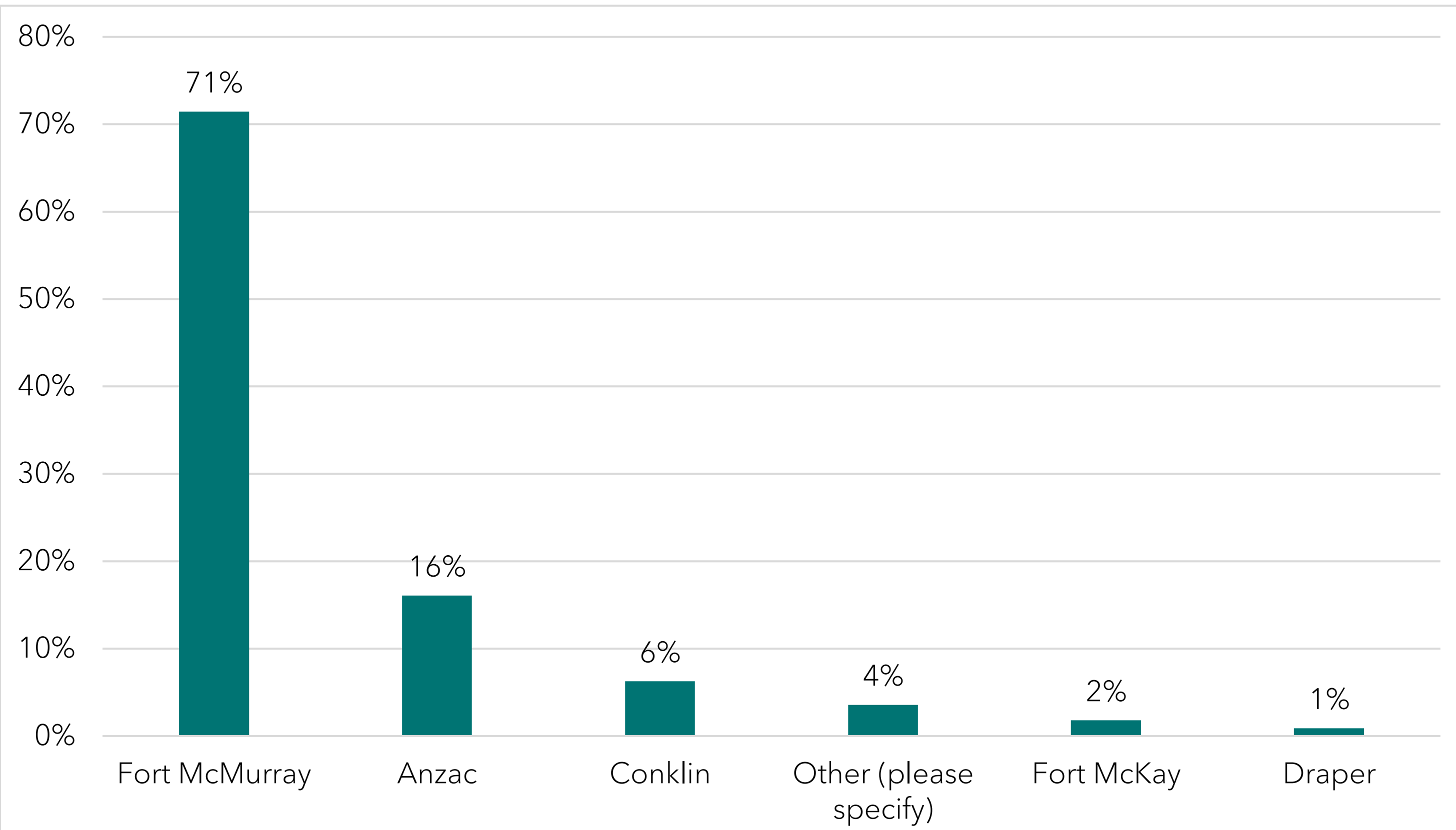


Appendix C: Survey Responses, Job Seekers and Employees

Demographics

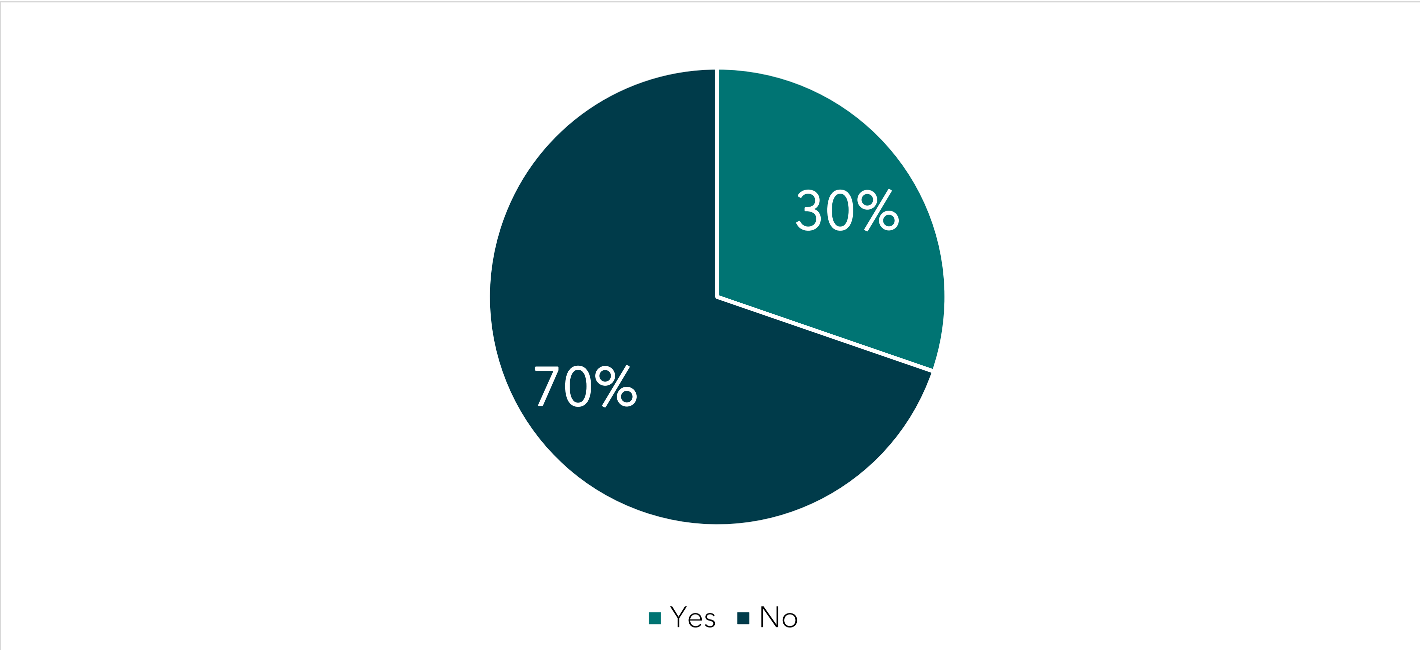
The majority (71%) of respondents were from the Fort McMurray area, with another 16% of respondents being from Anzac. Those who responded "other" were living outside the region but looking to move to Wood Buffalo.

Figure 42: Which Community do you Live in Most of the Time?



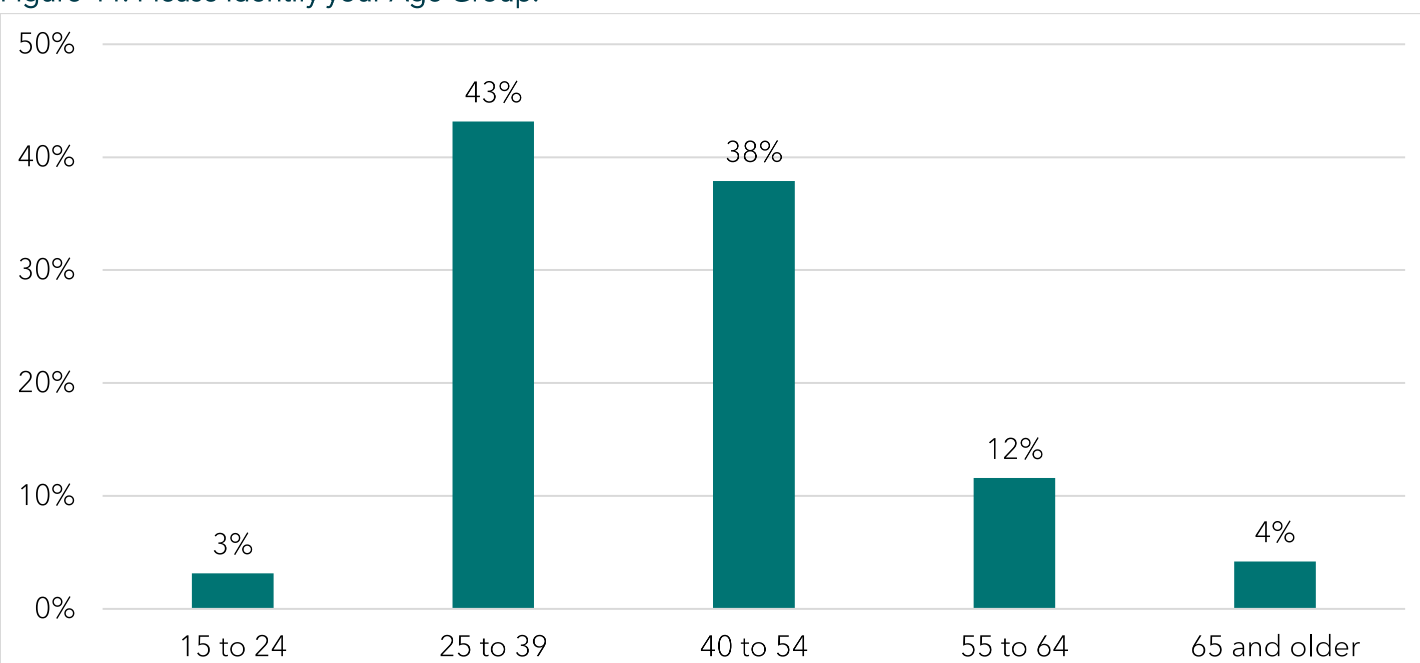
When asked whether they identify as an Indigenous person in Canada such as First Nation, Métis or Inuit, 30% of respondents confirmed that they do, while 70% do not.

Figure 43: Do you Identify as an Indigenous Person in Canada such as First Nation, Métis or Inuit?



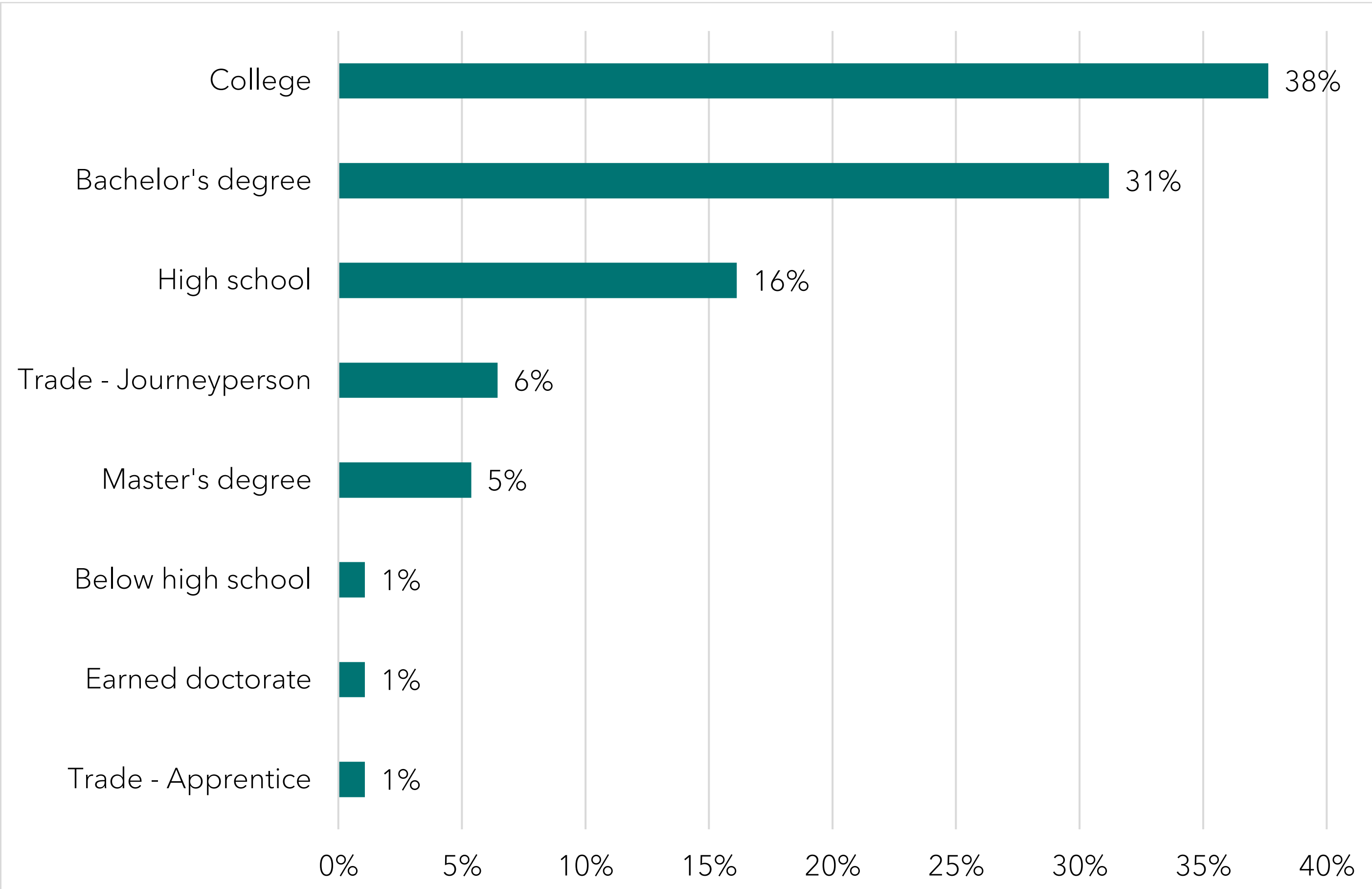
With respect to respondents' age, the majority (81%) were between 25 and 54, with 43% between 25 and 39 and 38% between 40 and 54.

Figure 44: Please Identify your Age Group.



College was the most commonly held highest level of education for respondents, with 38% receiving a college diploma and 31% receiving a Bachelor's degree.

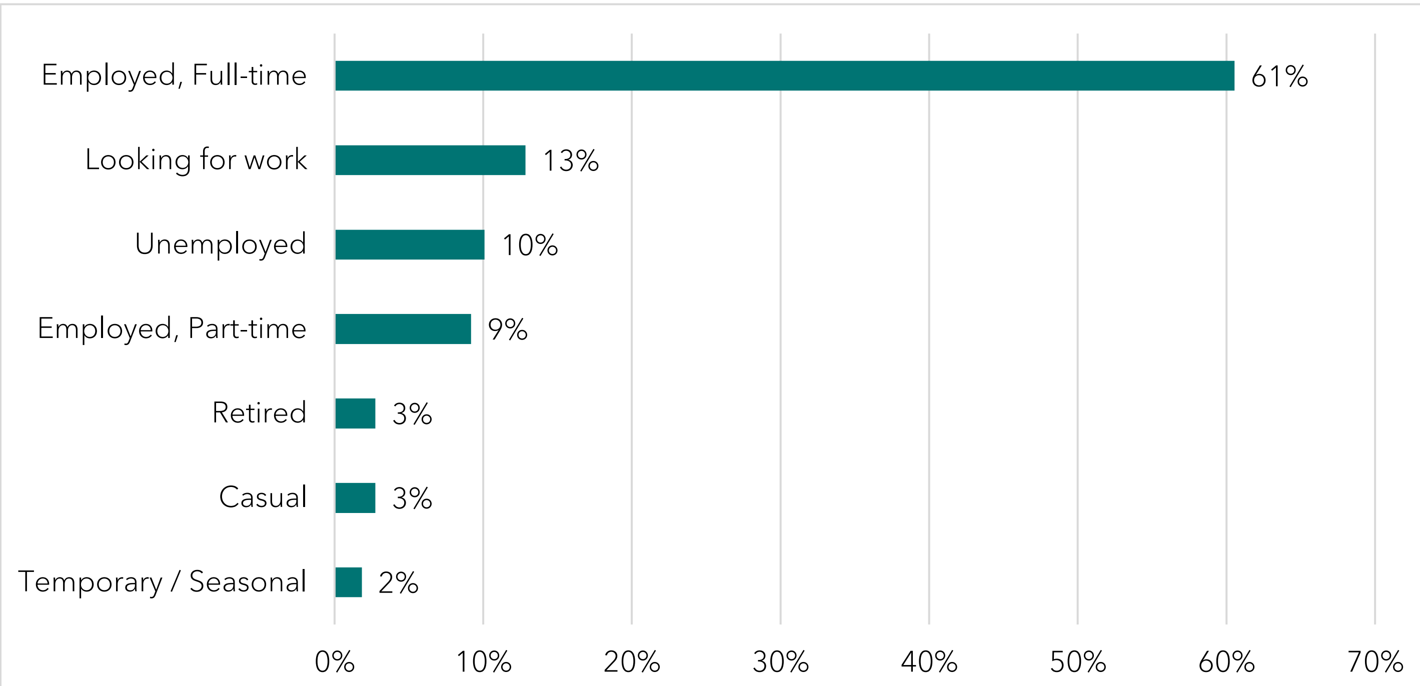
Figure 45: What is the Highest Level of Education you have Completed?



Labour Status

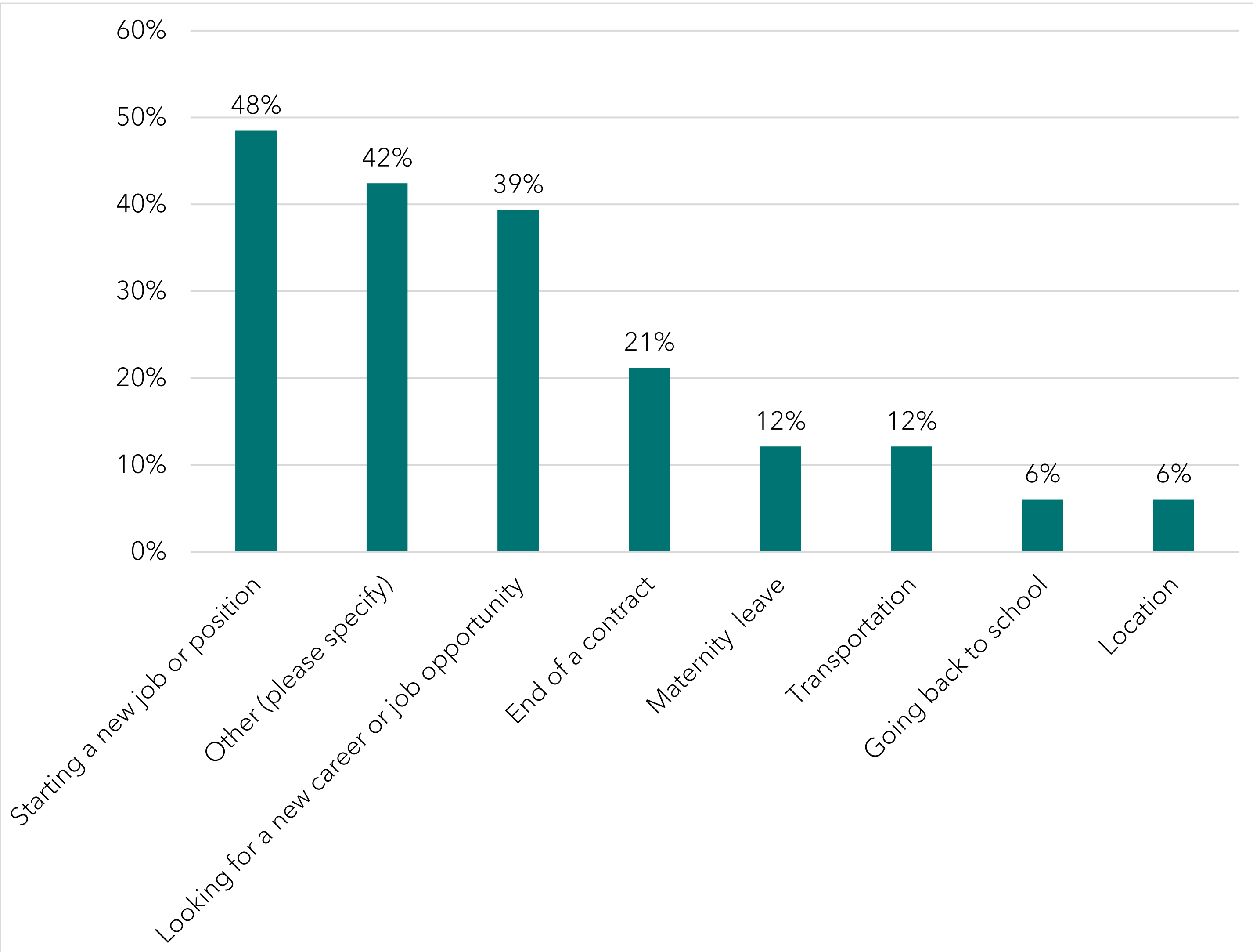
Three-fifths (61%) of respondents were employed full-time at the time of the survey, with 13% looking for work and 10% unemployed. Nine percent of respondents were underemployed, as they were employed part-time.

Figure 46: What is your Current Employment Status?



For respondents who had seen a change in employment status in the last 12 months, the most common reason was due to starting a new job or position.

Figure 47: If there has been a change in your employment status in the last 12 months, what factors are responsible for this change?



When noting what the most important reasons for staying in a job, respondents were most likely to focus on non-financial reasons. Please note again, as respondents could check more than one option, the percentage totals sum to over 100%.

Figure 48: Please Identify what you think are the Most Important Reasons for Staying in a Job.

Job Seeking

Respondents noted that barriers were generally low to finding and keeping meaningful employment.

Figure 49: To what Extent do you Feel the Following Factors Represent Barriers to you Finding, and Keeping, Meaningful Employment?

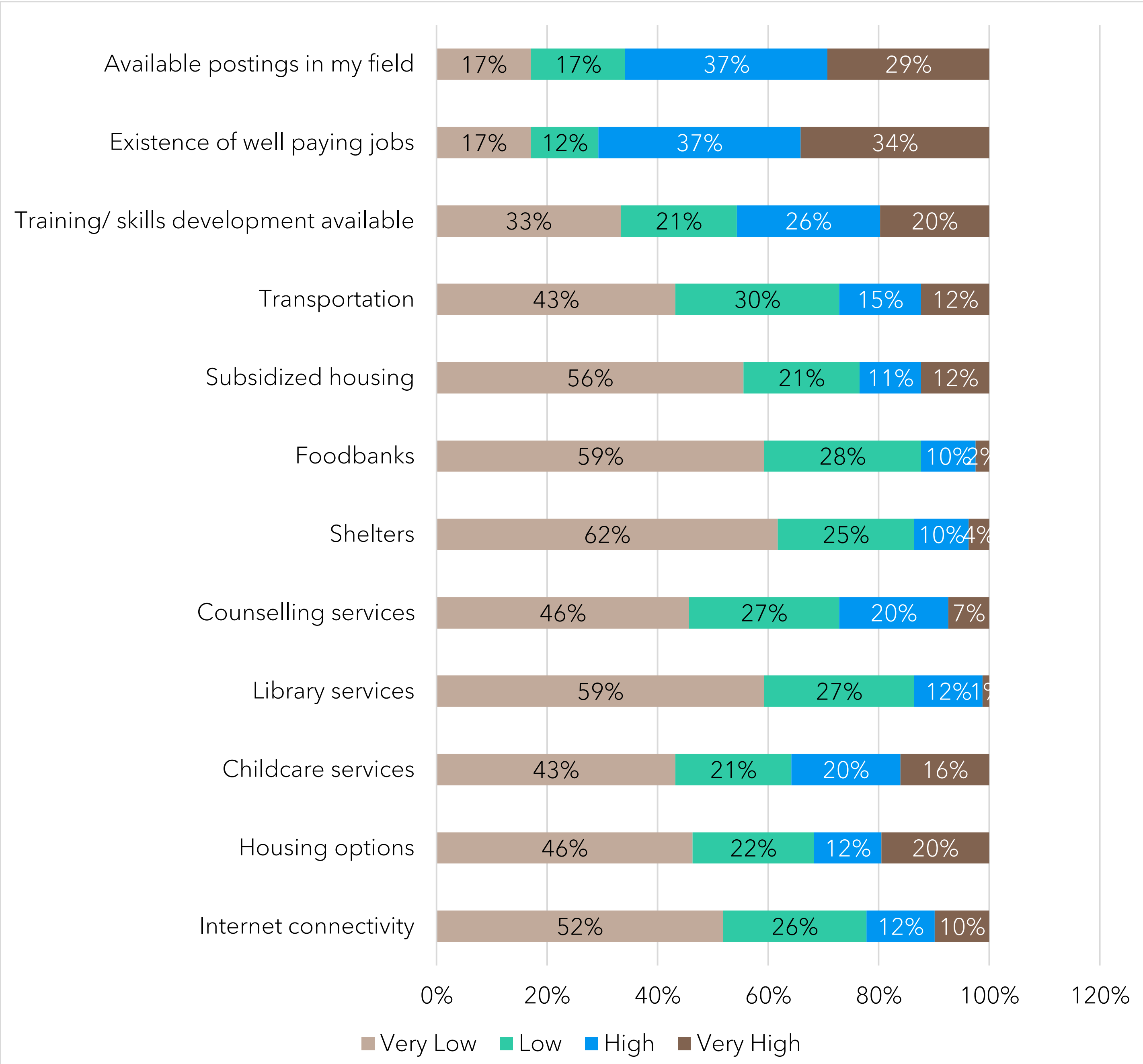
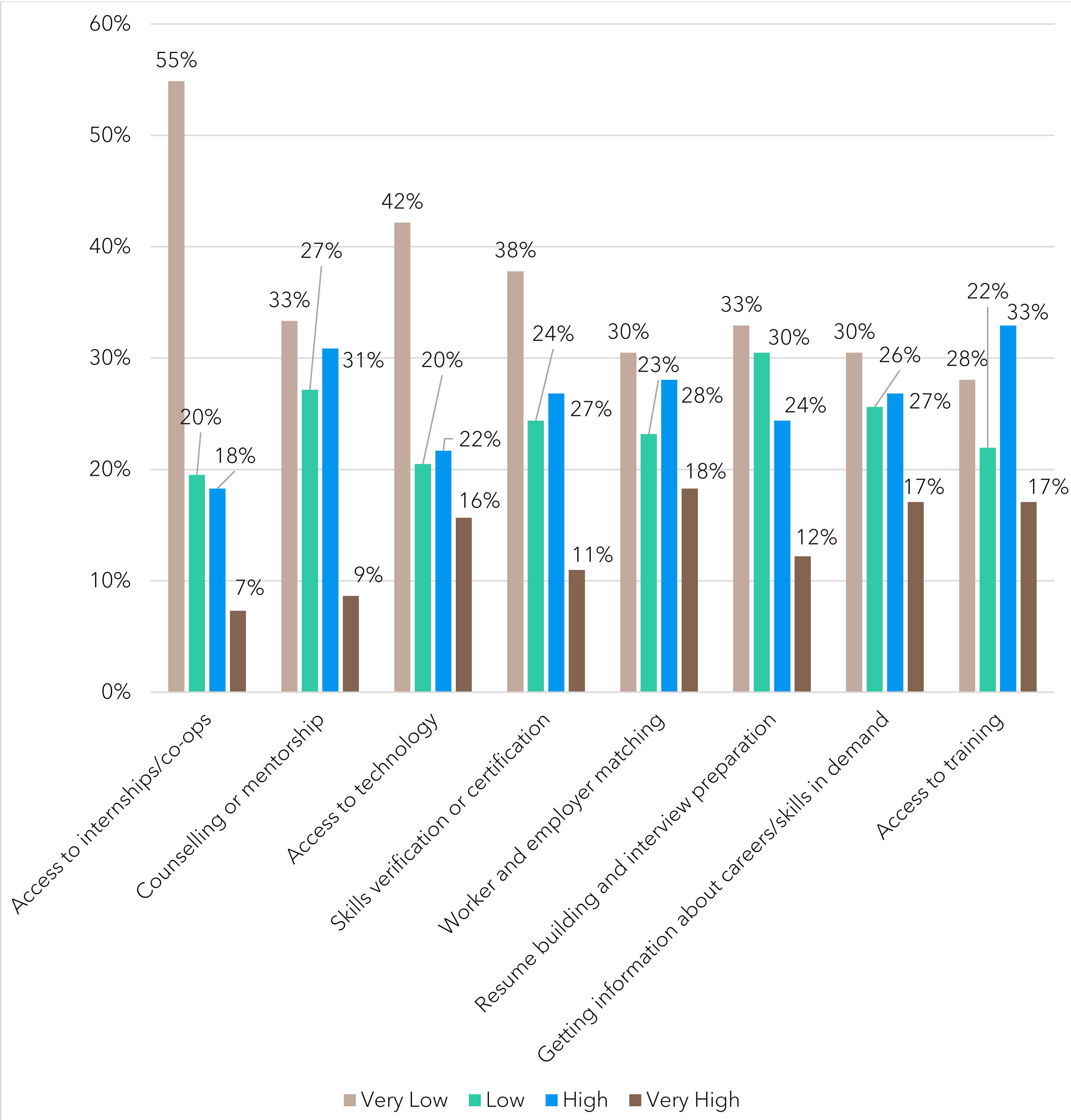


Figure 50: How Would you Rate your Current Need for the Following Services?



Training Questions

Respondents were typically interested in gaining new skills or re-training. In sum, 74% of respondents were interested in gaining new skills.

Figure 51: Are you Interested in Gaining New Skills or Re-Training?