Local Labour Market Plan
2019 – 2020

TWIG TORONTO WORKFORCE INNOVATION GROUP

About the Toronto Workforce Innovation Group

Toronto Workforce Innovation Group (TWIG) is a leading-edge research and partnership organization responding to the diverse needs of local communities and businesses in the area of workforce development. It is one of the 26 similar planning groups tasked by the Ministry of Labour, Training and Skills Development to work closely with our local economies. As Toronto's Workforce Planning Board, we conduct dynamic labour market research, disseminate information and convene stakeholders to address workforce development trends, gaps and opportunities. Among similar organizations in Toronto, our multi-stakeholder approach is unique; we work on issues across many sectors and engage stakeholders from a wide range of perspectives including federal government departments, provincial government departments, industry, training institutes, labour groups, and special interest groups to address skills and labour market information needs. Our research is an on-going and continuous process that includes our numerous consultations and focus groups with employment/training service providers and job seekers in addition to the deep data dive that informs our publications. We work to ensure that Toronto's workforce has the skills and talent it needs to meet the demands of a changing economy. TWIG achieves its goals through:

- Researching, analyzing and reporting on workforce development trends, gaps and opportunities in Toronto
- Acting as a resource to inform our stakeholders (community groups, educators and trainers, employers, governments, labour groups and media) about Toronto's workforce development issues

Acknowledgements

This report was prepared by TWIG's expert staff team. We acknowledge the participation of numerous Employment Ontario service providers whose network meetings informed this report, as well as conversations with many of those working with Toronto Employment and Social Services, community organizations, local employers and all other key labour market stakeholders. We are, as always, grateful for the support of the Ministry of Labour, Training and Skills Development that makes this work possible. The report does not reflect the views of the funders/sponsors and is solely the product of Toronto Workforce Innovation Group.

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1.0 Executive Summary

The annual Local Labour Market Planning (LLMP) report is prepared by the workforce planning board of Toronto, Toronto Workforce Innovation Group (TWIG) to share labour market characteristics and conditions in the City of Toronto. The 2019/20 update to Toronto's Labour Market Planning report is built on an evidence-based analysis of labour market strengths and challenges within the City of Toronto, and in some cases, Toronto, CMA. The intent of this report is to add value to local government, community organizations, job seekers, employers, employment service providers and other key labour market stakeholders in the City of Toronto and offer a basis for discussions on the latest labour market trends.

The Growth Plan (2019) forecasts 3.4 million people and 1.72 million jobs in the City of Toronto by 2041[1]. In 2019, the Toronto Employment Survey[2] recorded 1,569,800 jobs in the City of Toronto, a gain of 46,920 jobs or 3.1% from 2018. The 2018-2019 trend reflects a long-term increase in the share of part-time employment in the city. Service-based industries make up 78.4% of employment in Toronto's economy.

Toronto is now rated number three in North America for tech talent, according to the CBRE Group Inc.'s annual report[3]. In 2019, the city held steady at spot number seven for the most livable city in the world based on the Economist's Intelligence Unit's 2010 Global Livability Index ranking[4]. The city fared particularly well in its scores for healthcare, education and stability.

In 2019, the Toronto Employment Survey counted a record 76,560 business establishments in the city, a net increase of 920 establishments or 1.2%. This is the highest annual increase since 2011. Based on the Canadian Business Counts June 2019 data, the top 10 industries with the highest proportion of businesses with employees were: Professional, scientific and technical services (19.4%), health care and social assistance (11.5%) and retail trade (10.2%).

According to the labour force survey data analysis, in the year 2018, the top five industries with the largest share of employment in the City of Toronto were: professional, scientific and technical services[5] (13%); finance, insurance, real estate and leasing (11%) and health care and social assistance (11%), retail trade (10%), manufacturing (8%), accommodation and food services (7%) and educational services (7%). During the same year, 55 per cent of employment in the City of Toronto were in the following three occupations: sales and service (24%), business, finance and administration (19%), education, law and social, community and government services (12%).

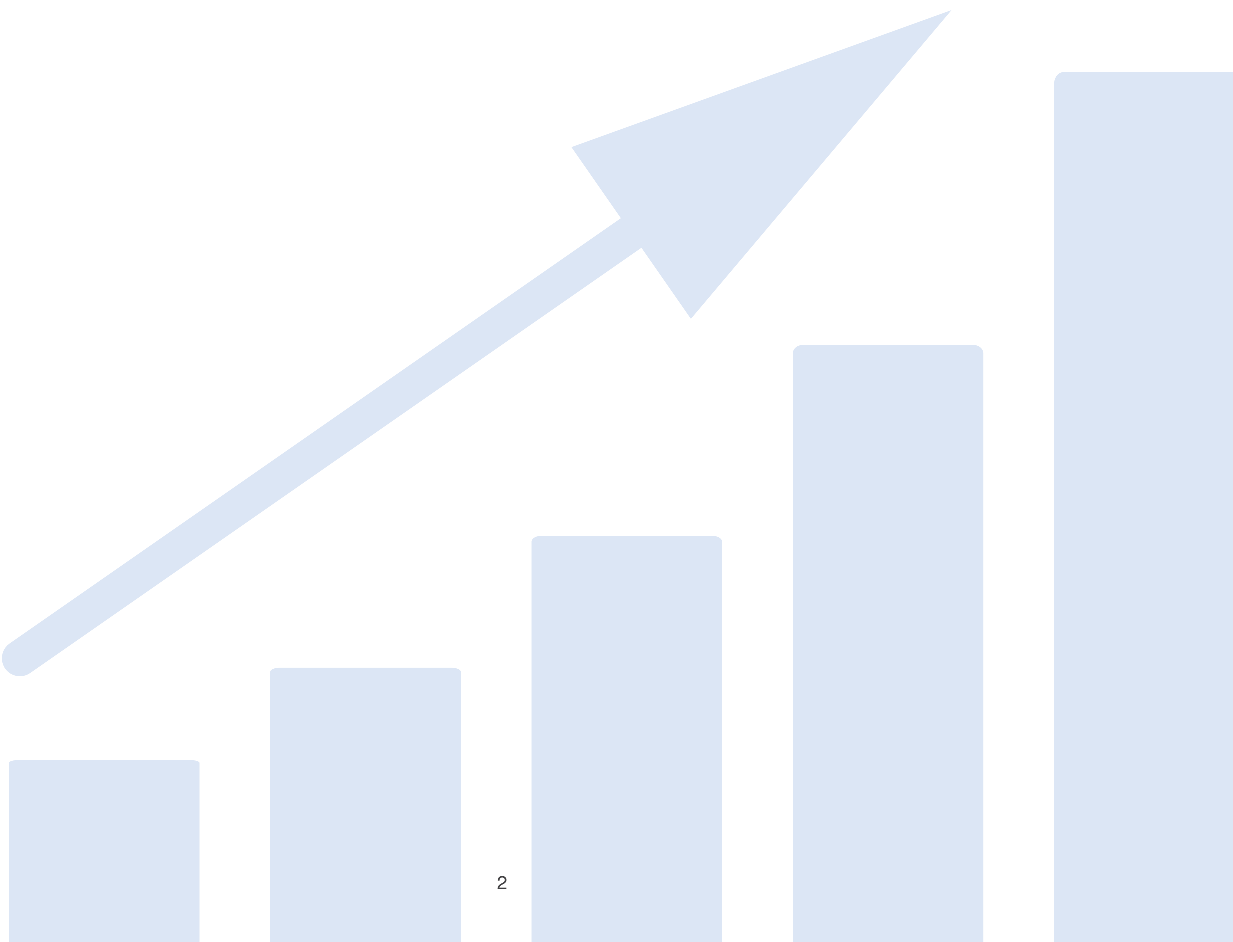
According to the job postings data by Vicinity Jobs, in the year 2019 there were a total of 273,333 jobs posted in the City of Toronto. Based on this source, in 2019, the hiring demand in Toronto was highest for sales and service occupations (19.2%), followed by management occupation (17.4%) as well as business, finance and administration occupations (16.1%). The top three occupations that experienced the highest growth in average hourly wage in the past five years were: sales and service (12.7%), business, finance and administration (10.4%) and education, law and social, community and government services (8.7%).

For the past four years, the labour force in the City of Toronto has been comprised of a higher share of individuals with an above bachelor's degree compared to a high school degree only and there was a strong positive correlation between a person's level of education and his or her earnings in the City of Toronto.

In 2018-19, the total number of clients that accessed Employment Ontario's suite of services were 159,171 of which 44,239 were assisted clients and 114,932 were unassisted clients. The number of assisted clients between 2017-18 and 2018-19 remained fairly steady with a slight increase of 0.2% only. However, during the same time period, the number of unassisted service clients increased by 4%. Overall 70% of the clients successfully secured employment after exiting the program.

2.0 Methodology

Information for this report was collected through a variety of data sources, including Statistics Canada (Canadian Business Patterns, Job Vacancy and Wage Survey and the Labour Force Survey), City of Toronto (Toronto Employment Survey, Toronto Economic Bulletin), Vicinity Jobs Inc-a Canadian Big Data analytics and Internet search technologies company, the Ontario Ministry of Finance and other relevant reports. The plan also incorporates information derived from ongoing stakeholder engagement, community consultations and local intelligence from private, public and not-for-profit sectors. The report also highlights the ongoing and emergent trends effecting industry, employment and working conditions. We also examined Employment Ontario (EO) program data that provides details of Employment Ontario's programs such as Employment Services, Literacy and Basic Skills, Second Career, Apprenticeship, Youth Job Connection Grant, Canada Ontario Job Grant Program and Ontario Employment Services. Taken together, these data sources and analysis can help to inform program and policy directions for the coming year.



3.0 Labour Force Characteristics

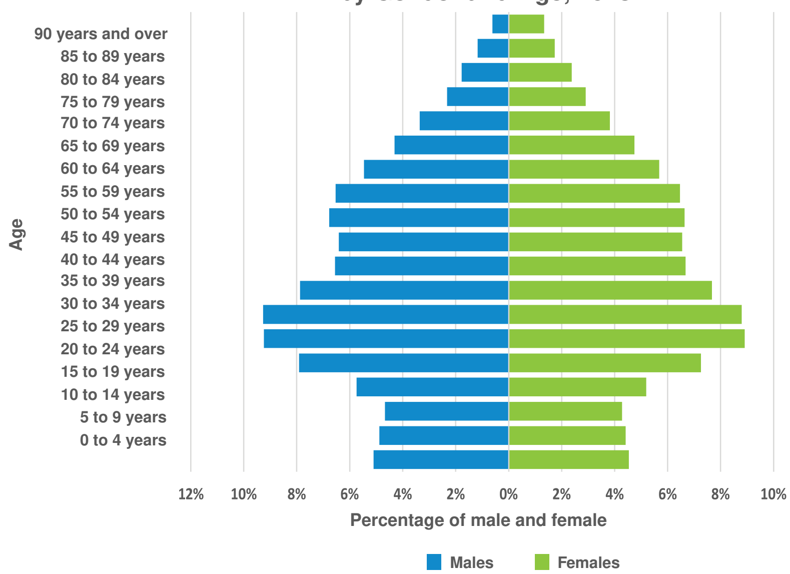
Population by Age and Gender

A latest report[6] by the Ontario Ministry of Finance projected Toronto's population to increase from 2.96 million in 2018 to 4.27 million in 2046, an increase of 44.5%, which is somewhat faster than the Ontario average.

In 2018, City of Toronto's population was 2,956,024 which comprised of 20.7% of the population in the province of Ontario. The share of male was 48.7% and female was 51.3%. The population grew annually by 2.7% between the year 2017-18 which was slightly higher at 0.7 percentage point increase compared to the annual growth in the previous year.

Figure-1 illustrates the gender and age distribution of the City's population as of 1st July 2018. The top three age cohorts that comprised the City's total population were 25-29 years (9.1%), 30-34 years (9.0%) and 35-39 years (7.8%). However, the age cohorts of the city residents that experienced the largest percentage increase were 90+ years (7.0%) followed by 30-34 years (6.0%) and 35-39 years (5.7%).

Figure 1: City of Toronto Population by Gender and Age, 2018



Source: City of Toronto, Economic Development and Culture Division

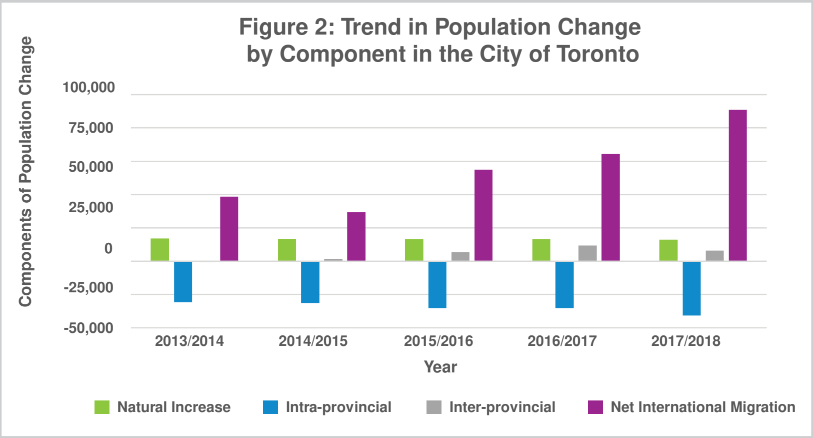
According to the Ryerson University's Centre for Urban Research and Land Development[7] for the 12 months ending July 1, 2018, Toronto was the second fastest growing metropolitan area and the top growing city in all of the United States and Canada.

3.0 Labour Force Characteristics

Population Change by Components for the City of Toronto

The City of Toronto is made up of a growing and diverse population. Figure-2 reports the change in population by four key components- natural increase[8], intra-provincial migration[9], inter-provincial migration[10] and net international migration[11].

Net International migration is the main driver of population growth in the City of Toronto and appeared to have an upward trend in the past five years. Between 2017/18 and 2016/17, the net international migration increased significantly by 41% compared to a rise of 17% in the previous period. While the natural increase in population stagnated over time, the net intra-provincial migration in 2017/18 were -32,567.



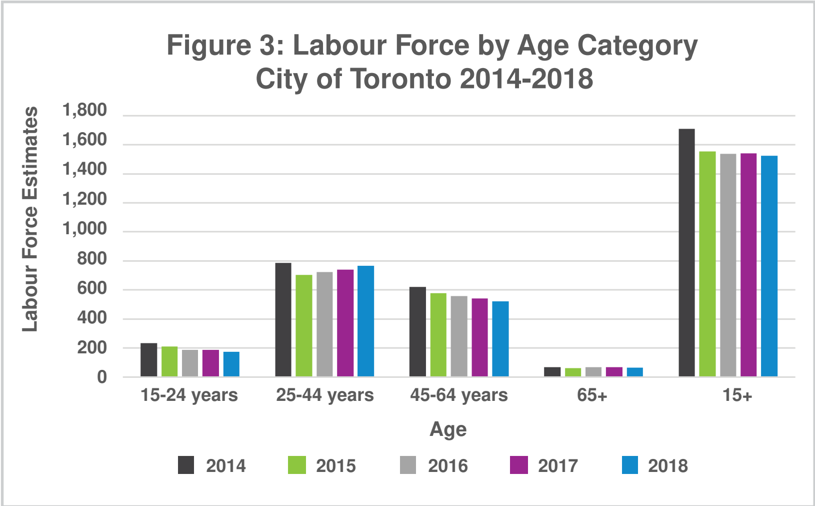
Source: City of Toronto, Economic Development and Culture Division

3.0 Labour Force Characteristics

City of Toronto's Labour Force Characteristics

According to the standard definition, labour force constitutes those who are employed and unemployed. The employed are persons having a job or business, whereas the unemployed are without work, are available for work, and are actively seeking work. Figure-3 illustrates the trend in the labour force estimates in the City of Toronto for the past five years by broad age-categories. In 2018, the labour force aged (15+ years) in the City of Toronto was 1,525,400 of which 52% were male and 48% were female.

There has been a significant change in the size of the city's labour force in the past five years from 2014-18. The size of the labour force aged 15+ years declined by 10.7% with declines in all age categories except for the age category 25-44 years that increased between 2015 and 2018. The composition of the labour force by age categories in the year 2018 were: 15-24 years (11%); 25-44 years (50%); 45-64 years (34%) and 65+ years (4%).

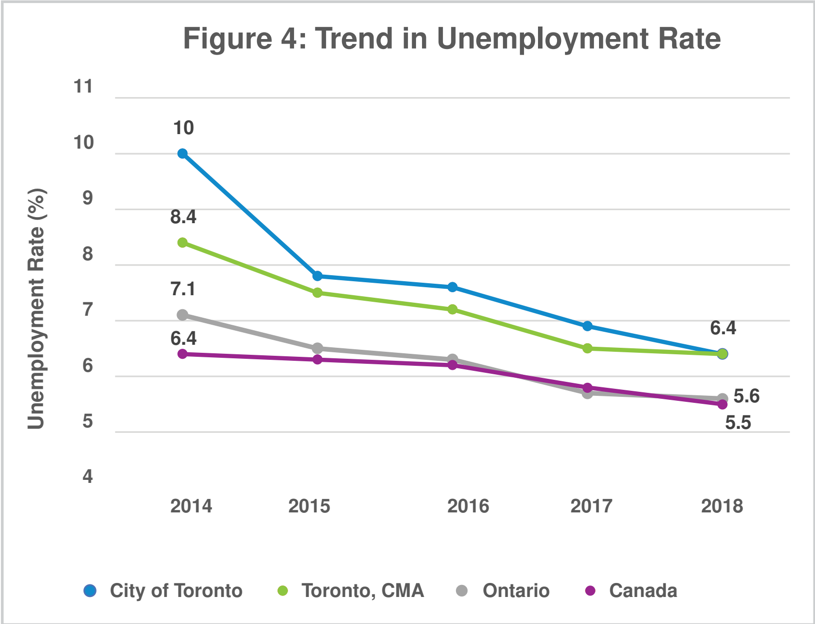


Source: Statistics Canada, Labour Force Survey Data

Labour Force Activity

In 2018, a total of 517, 200 residents in the City of Toronto were unemployed. Figure 4 below compares the trend in the unemployment rate for individuals aged 15+ years for four levels of geography- City of Toronto, Toronto CMA, Ontario and Canada between 2014 and 2018.

According to figure-4, the unemployment rate[12] trended downwards for all four levels of geography in the past five years. Although the unemployment rate in the City of Toronto has been relatively higher compared to the unemployment rate of the other geographies, this gap has been declining over the years. In 2018, the unemployment rate by the four levels of geographies were: City of Toronto (6.4%), Toronto CMA (6.4%), Ontario (5.6%) and Canada (5.5%).



Source: Statistics Canada, Labour Force Survey Data

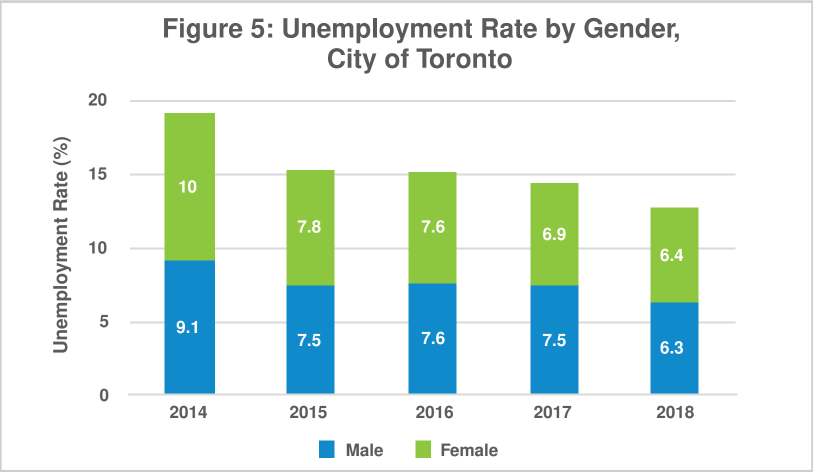
3.0 Labour Force Characteristics

In these past five years, unemployment has improved more than at any point in Toronto's history. The city's unemployment rate reading fell by 3.6 percentage points from 10% in the year 2014 to 6.4% in the year 2018 indicating signs of recovery in the local economy. However, temporary and self-employed jobs are increasing far faster in Toronto than the rest of the country, while permanent jobs are increasing faster in the rest of Canada[13].

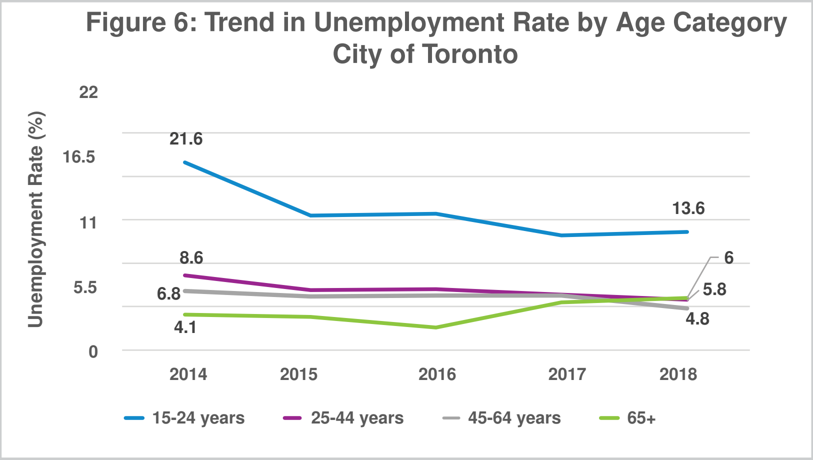
Figure-5 reports the unemployment rate by gender for individuals aged 15+ years between the years 2014 and 2018. As reported by figure-4, the city saw a decline in the overall unemployment rate over the past five years and both male and female workforce has been a part of this trend.

In 2018, the unemployment rate for male (6.3%) versus female (6.4%) in the City of Toronto suggested that both the genders were doing equally well in terms of this labour market indicator. It is admirable that the city managed to reduce the unemployment rate gap between its male and female residents that was relatively higher in the past couple of years.

Figure 6 below highlights the trend in the unemployment rate by broad age categories for the City of Toronto residents. The unemployment rate in 2018 by age categories were: 15-24 years (13.6%); 25-44 years (5.8%); 45-64 years (4.8%) and 65+ years (6%). While the unemployment rate has declined for all age groups except for 65+ years, the jobless condition appeared to be more prevalent among the age group 15-24 years.



Source: Statistics Canada, Labour Force Survey Data



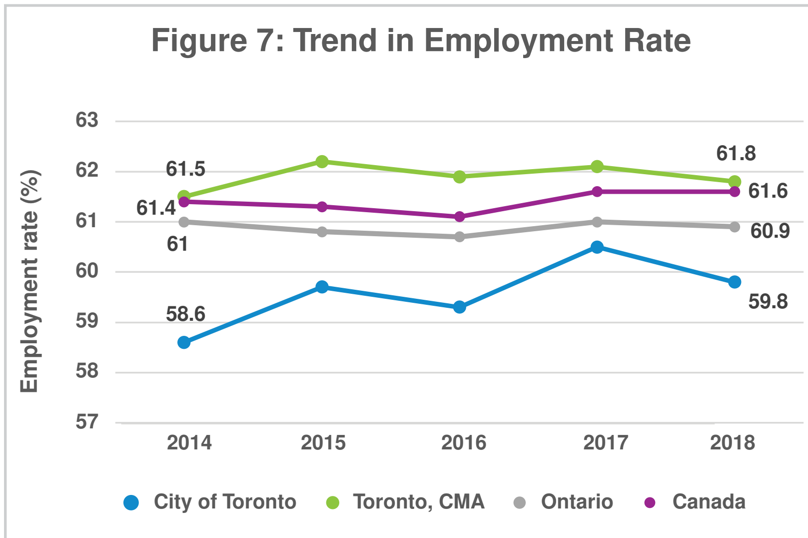
Source: Statistics Canada, Labour Force Survey Data

3.0 Labour Force Characteristics

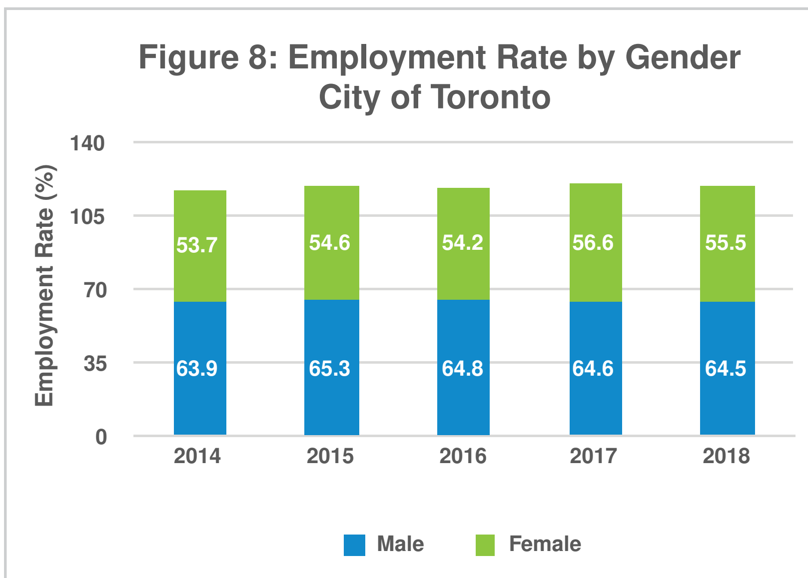
As Figure-6 illustrates, the youth (15-24 years) unemployment rate is consistently, roughly, twice the rate of the core-age (25-44 years) unemployment rate. In a CBC interview[14], Gordon Betcherman a labour economist at the University of Ottawa mentioned some reasons behind higher youth unemployment rate. Firstly, young people tend to start out in low-wage job in retail and fast food that are really big turnover industries. Also, this age group was more likely to be in period that experts call "transition to work" i.e. switching from one job to another until they find a niche in steady employment. As more and more people are choosing to stay in school to acquire higher levels of skills, this transitionary period may easily apply to individuals up to 30 years of age.

Figure 7 depicts an upward trend in employment rate[15] for individuals aged 15+ years in four levels of geography between 2014 and 2018. In 2018, the employment rates were: City of Toronto (59.8%); Toronto CMA (61.8%); Ontario (60.9%) and Canada (61.6%).

According to 2018 Toronto Employment Survey[16], service-based industries made up 78.1% of employment in Toronto's economy. In 2018, the city counted a total of 1,523,180 jobs (an increase of 26,940 jobs or 1.8% increase) compared to the previous year. However, this was slightly below long-term trends. The same survey reported that the 2017-2018 trend reflected a long-term increase in the share of part-time employment in the city. Part-time employment (24.7% of total) added 11,360 jobs (3.1%) from 2017 whereas full-time employment (75.3% of total) grew more slowly than the city average, adding 15,580 jobs (1.4%) from 2017. In the last five years, net new jobs are increasingly concentrated in the downtown area versus the rest of the city.



Source: Statistics Canada, Labour Force Survey Data

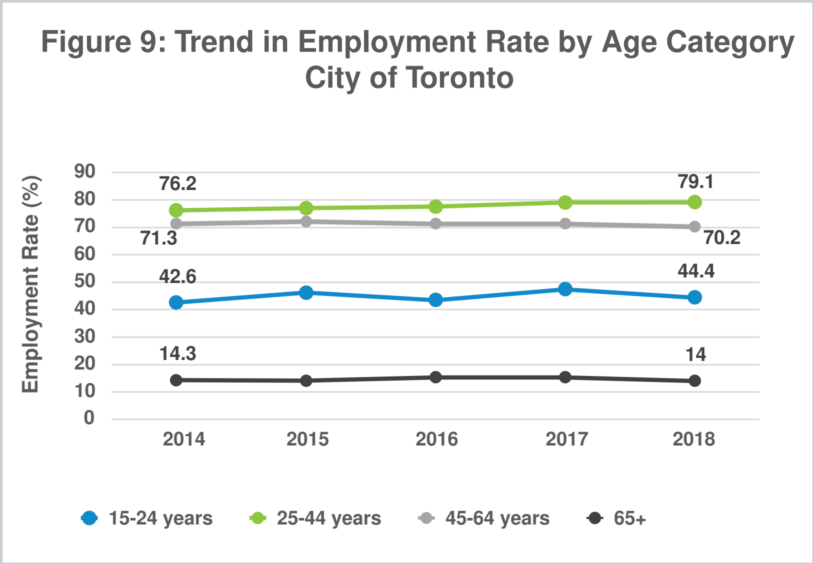


Source: Statistics Canada, Labour Force Survey Data

3.0 Labour Force Characteristics

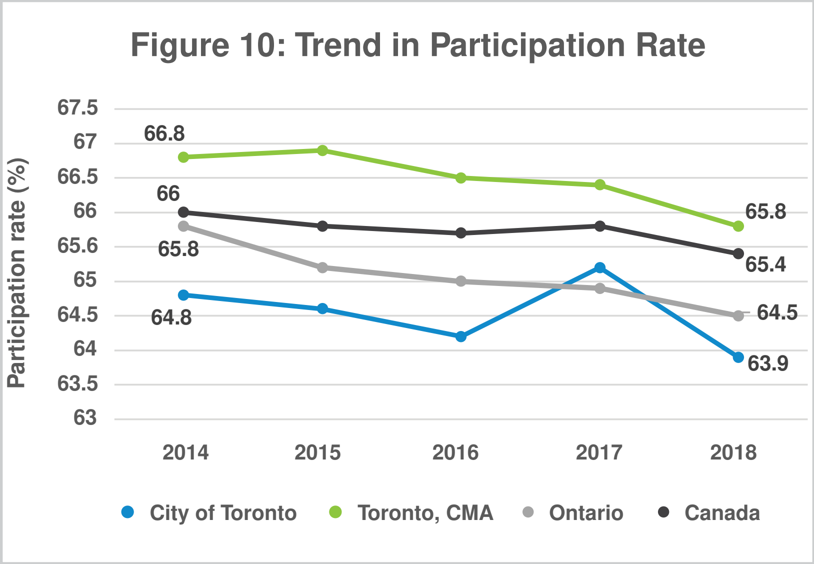
There has been an upward trend in employment rate for both the genders in the City of Toronto in the past five years. However, unlike the unemployment rate gap getting smaller between the male and female (see figure 5); there is still a persistent gap between the two groups in terms of the employment rate.

As reported in Figure-9, employment rate in the City of Toronto between 2014 and 2018 remained steady for all broad categories of age. The age category that reported notable developments in the employment rate during this time period was core working age group 25-44 years. Employment rate for this category, increased by 2.9 percentage point. Youth workforce aged 15-24 years also saw a 1.8 percentage point increase in the level of employment. Employment rate declined slightly for the age groups 45-64 years and 65+ years.



Source: Statistics Canada, Labour Force Survey Data

Figure-10 represents a five-year trend in labour market participation rate[17] for individuals aged 15+ years for four levels of geography. It appears that the participation rate is following a declining trend for all the geographies used in the analysis. In the year 2018, the participation rates were: City of Toronto (63.9%), Toronto, CMA (65.8%); Ontario (64.5%) and Canada (65.4%).



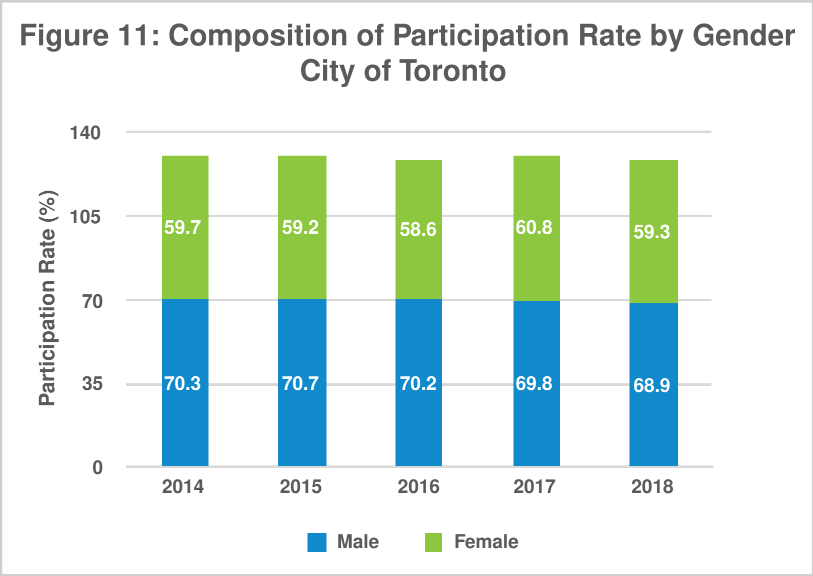
Source: Statistics Canada, Labour Force Survey Data

According to a latest Statistics Canada report[18] in recent years, the overall Canadian participation rate began to decline due to the fact that the population aged 15 and over is now growing faster than the labour force. The latter is also still growing, but at a slower pace. Population aging—aging of the large cohort of people born during the baby boom era who are leaving the labour force too—is the dominant factor that is putting a downward pressure on the labour force participation rate.

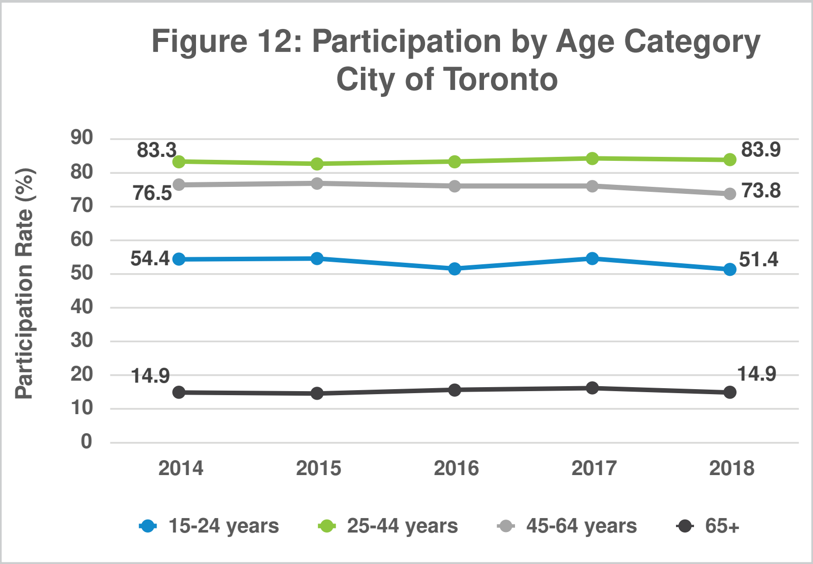
3.0 Labour Force Characteristics

The labour force participation rate for 15+ years by gender (see figure-11) corroborates the findings reported in figure-10. Both male and female in the labour force were part of the declining trend in the labour participation rate in the City of Toronto, between 2014 and 2018. Also, the participation rate continues to be higher for males compared to their female counterparts. However, it must be noted that the gender gap in the participation rate has declined over time.

While the labour force participation rate (see figure-12) has remain fairly consistent over the years for the age groups 25-44 years and 65+ years, there has been a decline in the labour force participation rates for people in the age category 15-24 years (3 percentage point decline) and 45-64 years (2.7 percentage point decline).



Source: Statistics Canada, Labour Force Survey Data



Source: Statistics Canada, Labour Force Survey Data

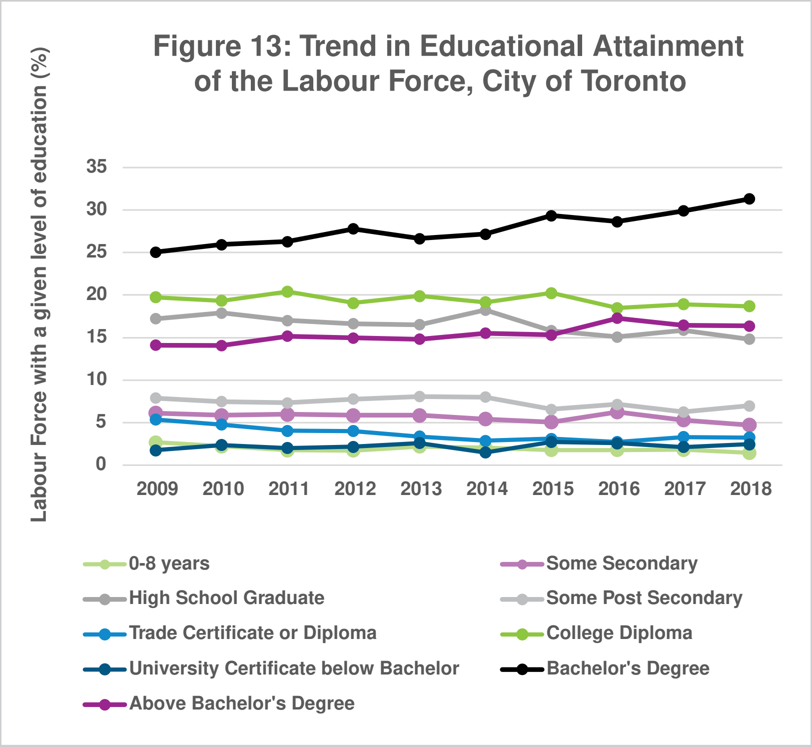
3.0 Labour Force Characteristics

Labour Force by Level of Education

Educational attainment of the labour force is one of the key determinants of the labour market outcome for any economy. Figure-13 reports the past ten-year trend in educational attainment of the City's labour force aged 15+ years. Since 2009, bachelor's degree, college diploma, high school graduate, above bachelor's degree and some post-secondary degree were the top five broad categories of educational levels that made up a significant share of the city's labour force.

It is to be noted that although between 2009 and 2014, the share of labour force with a high school degree only were greater than share of labour force with an above bachelor's degree, this scenario changed in 2015. For the past four years, the labour force in the City of Toronto is comprised of a higher share of individuals with an above bachelor's degree compared to a high school degree only.

Between 2009 and 2018, the share of the labour force made up of people with a bachelor's degree and above bachelor's degree has grown consistently, from 25% to 31% and from 14% to 16% respectively. Over the same time period, the proportion of people with other types of educational attainment like (below high school degree, high school degree, trade certificate, college diploma) all declined by 1-3 percentage point.



Source: Statistics Canada, Labour Force Survey Data

Given that educational attainment is a crucial determinant of labour market outcome, everything else remaining same, a rising share of labour force with a university degree signals better chances on the labour market. It indicates that the workforce is supposed to be at a lower risk of unemployment[19] and stand a better chance of being employed on stable life-time contracts[20]. Secondly, more highly educated people also tend to participate more frequently in the labour force[21].

In a latest Toronto Vital Signs report 2019/20[22] although more and more Torontonians are graduating, and attending post-secondary institutions, the rising costs of education and living coupled with the increase in precarious work are causing new challenges for students and recent graduates.

3.0 Labour Force Characteristics

Employment by Level of Education

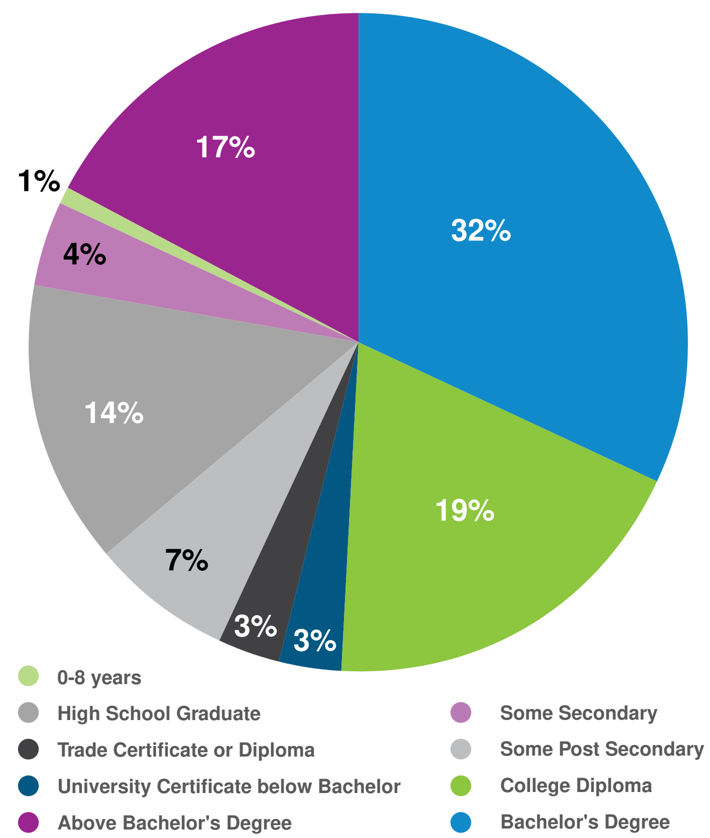
Figure-14 illustrates the educational qualifications of the employed residents in the City of Toronto in the year 2018. The top three broader classification of educational qualification that comprised the employed residents in the City of Toronto were bachelor's degree (32%), above bachelor's degree (17%) and college diploma (19%). Only 1% of those employed didn't complete high school.

Trend in Average Hourly Wage

Figure-15 displays a 10- year upward trend in the average hourly wage for individuals aged 15+ years for all levels of education in the City of Toronto. The same framework has been used to report the average hourly wage rate by gender to depict the gender wage gap.

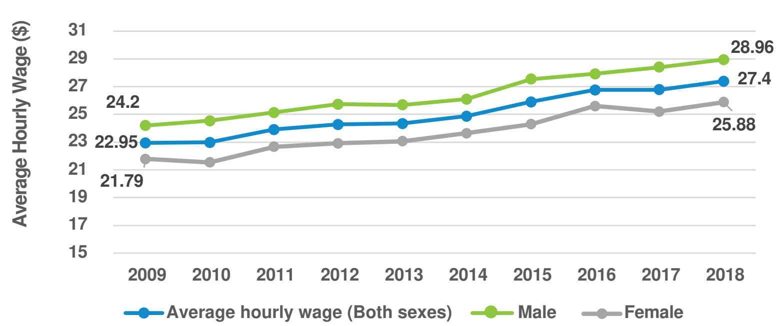
The overall average hourly wage has increased from $22.95 in 2009 to $27.4 in 2018. In these 10 years' time period, the average hourly wage rate of male has been higher than the average hourly wage rate representing both sexes. Although there has been a rise in the average hourly wage for both genders, a persistent gap existed in the average hourly wage of males and females. In 2018, the average hourly wage earned by females were ($25.9) compared to male ($30.0).

Figure 14: Employment by Educational Attainment, City of Toronto 2018



Source: Statistics Canada, Labour Force Survey Data

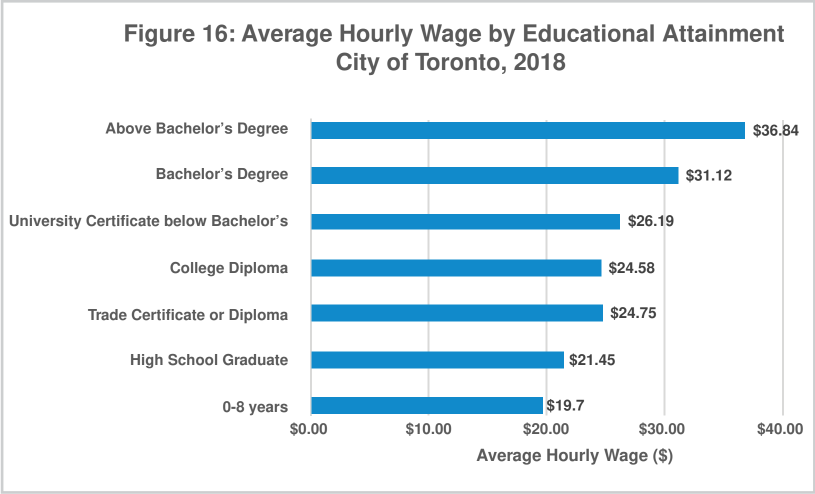
Figure 15: Trend in Average Hourly Wage City of Toronto



Source: City of Toronto, Economic Development and Culture

3.0 Labour Force Characteristics

In the past ten years, the gender wage gap was the lowest in the year 2016 with a gap of $2.33 an hour and highest in the year 2015 with a gap of $3.24 an hour. Compared to the national level data, the gender wage gap in hourly rate is lesser in the City of Toronto. A latest Statistics Canada study[23], reported that in 2018, female employees aged 25-54 years in Canada earned $4.13 less per hour, on average, than their male counterparts. According to this Statistics Canada report, the two largest factors explaining the gender wage gap in 2018 were the distribution of women and men across industries (three high paying male dominated sector's that drove gender wage gap in the country were construction, manufacturing , and mining, quarrying, and oil and gas extraction) and the second factor behind persistent gender wage gap is women's overrepresentation in part-time work.



Source: City of Toronto, Economic Development and Culture

Average Hourly Wage by Educational Attainment

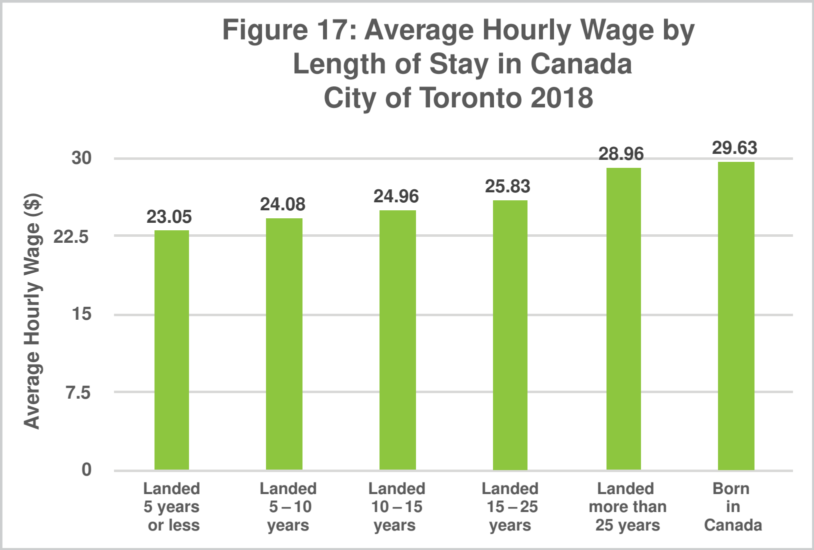
Using the labour force survey data, Figure-16 confirms that in the year 2018, there was a positive correlation between a person's level of education and his or her earnings in the City of Toronto. The analysis suggested that Torontonians with higher educational attainment earned far more over their lifetimes than those who only graduated from high school. This brief statistical analysis reveals that staying in school really does pay off.

3.0 Labour Force Characteristics

Average Hourly Wage by Length of Stay in Canada

Figure-17 reports the average hourly wage earned by the City of Toronto residents based on the number of years they lived in Canada. Using the labour force survey data, on average, immigrants make less an hour compared to people born in Canada. However, this gap reduces the longer the immigrant has lived in the country.

The immigrant wage gap varies by province[24], with the widest gap in Alberta and the narrowest in Nova Scotia. On the other hand, in the Northwest Territories and in Newfoundland and Labrador, immigrants earn on average more than people born in Canadians. According to a Conference Board of Canada report[25] the main factors that contributes to the wage gap are language skills, foreign qualification and skill recognition, and discrimination. In 2018, the wage gap between a newcomer immigrant and someone born in Canada stood at $6.6 an hour in the City of Toronto.



Source: Statistics Canada, Labour Force Survey Data

3.0 Labour Force Characteristics

Share of Employment in the City of Toronto by Industry Classification

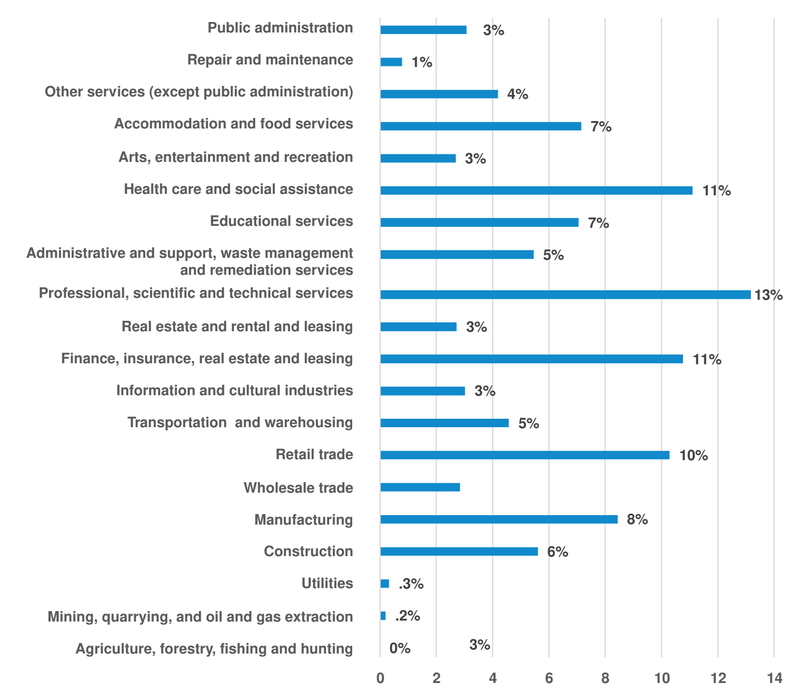
The City of Toronto has a diverse economic base providing wide variety of jobs and opportunities for its labour force. The share of service-oriented jobs for the City of Toronto has shown steady growth over the years. In comparison, the share of employment in the goods-producing sectors has shown a gradual decline over time. Based on labour force survey data analysis, in 2018 the share of employment in the City of Toronto in the service producing sector was 85.4% compared to 84.5% in 2009. On the other hand, the share of employment in the goods producing sector was 14.6% in 2018 versus 15.4% in 2009.

Figure-18 illustrates the distribution of employed residents 15+ years by the North American Industrial Classification (NAICS) in 2018 in the City of Toronto. According to the labour force survey, in the year 2018, the top five industries with the largest share of employment in the City of Toronto were:

1. Professional, scientific and technical services[26] (13%);
2. Finance, insurance, real estate and leasing (11%) and Health care and social assistance (11%)
3. Retail trade (10%)
4. Manufacturing (8%)
5. Accommodation and food services (7%) and Educational services (7%)

In the future, with emerging new trends and technologies leading to corresponding changes to employment needs there is likely to be shifts within employment sectors.

Figure 18: Share of Employment by NAICS City of Toronto, 2018



Source: Statistics Canada, Labour Force Survey Data

3.0 Labour Force Characteristics

Share of Employment in the City of Toronto by Occupation

Figure 19 below depicts the share of employment by broader occupational classification for individuals aged 15+ years for all levels of education in the City of Toronto in the year 2018.

In the year 2018, 55 per cent of employment in the City of Toronto were in the following three occupations:

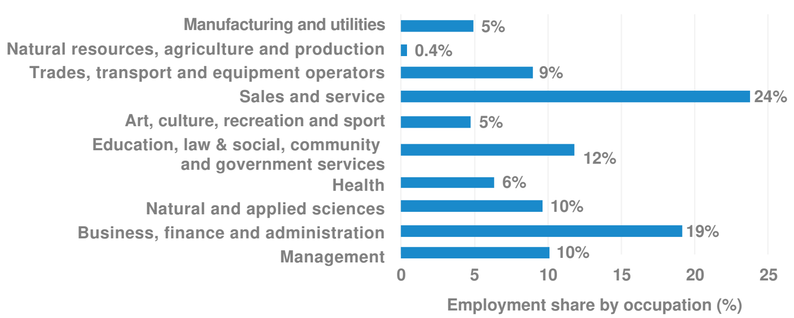
1. Sales and service (24%)
2. Business, finance and administration (19%)
3. Education, law and social, community and government services (12%)

Under sales and service occupations, majority of the employment fell under the category service support and other service occupations. This included food counter attendants, kitchen helpers and related support occupations, support occupations in accommodation, travel and amusement services, cleaners and other support.

Occupations in business, finance and administration were mostly made up of the professional occupations of business and finance. This included auditors, accountants and investment professionals, human resources professionals, business management consultants, consultants in advertising, marketing and public relations.

Education, law and social, community and government services occupations mostly comprised of professional occupations in education services. This included university professors and post-secondary assistants, college and other vocational instructors, secondary and elementary school teachers and educational counsellors.

Figure 19: Share of Employment by National Occupational Classification (NOC), City of Toronto, 2018



Source: Statistics Canada, Labour Force Survey Data

3.0 Labour Force Characteristics

Trend in the Average Hourly Wage by National Occupational Classification (NOC)

Figure-20 illustrates the annual five-year trend in the offered average hourly wage rate by broader occupational classification in the City Toronto between 2014 and 2018.

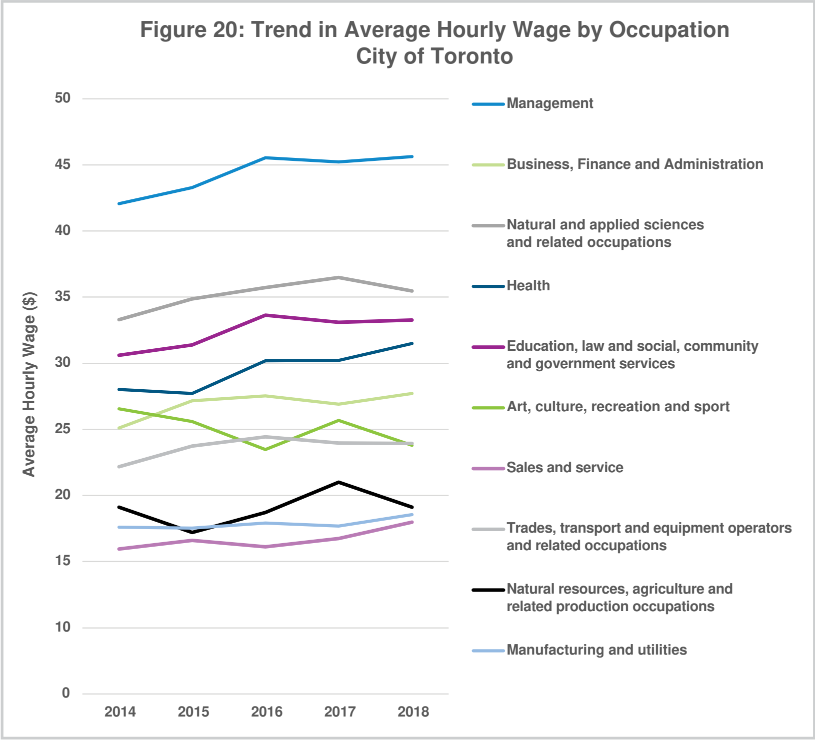
During this five-year period, the top three high paying occupational categories in terms of average hourly rate were:

1. Management ($45.6)
2. Natural and applied sciences and related occupations ($35.5)
3. Education, law and social, community and government services ($33.3)

However, unlike management occupations and occupations in education, law and social, community and government services, occupations in natural and applied sciences experienced a 6.6 % decline in the average hourly wage between 2018 and 2014.

The top three occupations that experienced the highest growth in average hourly wage in the past five years were:

1. Sales and service (12.7%)
2. Business, finance and administration (10.4%)
3. Education, law and social, community and government services (8.7%).



Source: Statistics Canada, Labour Force Survey Data

3.0 Labour Force Characteristics

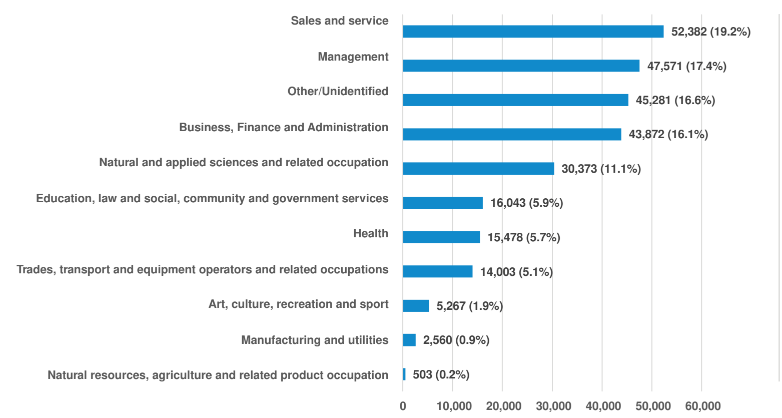
Hiring Demand, City of Toronto, 2019

The trend and pattern in hiring demand in the City of Toronto in the year 2019 has been reported using the following figure-21, table-1 and table-2. These analyses were done based on a web-based platform called Vicinity Jobs that collects real time labour market data.

The regional search engine of this web-based platform has been used to generate labour demand analytic reports for the City of Toronto using data on job postings found between 1st Jan 2019 and 31st Dec 2019. According to the job postings data by Vicinity Jobs, in the year 2019 there were a total of 273,333 jobs posted in the City of Toronto.

In 2019, hiring demand in Toronto was highest for sales and service occupations (19.2%), followed by management occupation (17.4%) as well as business, finance and administration occupations (16.1%). The category other/unidentified in the figure includes all job postings that do not provide a sufficiently specific job title and employer information to allow allocation to a 4-Digit NOC code, as per NOC 2016 specifications.

Figure 21: Job Postings by Occupational Category in the City of Toronto, 2019



Source: Vicinity Jobs

Table-1 below reports a break-down of the in-demand occupations by 4-digit NOCS for the three occupational categories-Sales and service, Management and Business, Finance and Administration that had the most numbers of jobs posted in the city in 2019.

Table 1: Top Three In-Demand Occupations by 4-digit NOCS

Sales and Service Occupations	Management Occupations	Business, Finance and Administration Occupations
Retail salespersons	Corporate Managers	Administrative Officers
Cooks	Retail and Wholesale Trade Managers	Administrative Assistant
Other customer and information services representatives	Advertising, Marketing and Public Relations Manager	Professional occupations in advertising, marketing and public relations

Source: Vicinity Jobs

3.0 Labour Force Characteristics

Randstad Canada[27], using data from Gartner Talent Neuron and Randstad's internal systems which measure job openings, job placements and other data in Canadian markets reported the following as the 15 best jobs in Canada for 2020:

1. Sales associate
2. Driver
3. Receptionist
4. Welder
5. Developer
6. Business development manager
7. General labourer
8. Project manager
9. Heavy duty mechanic
10. Merchandiser
11. Electrical engineer
12. Accountant
13. HR manager
14. Financial advisor
15. Registered nurse

Table 2 below lists the top-10 industries by 2-digit that advertised the largest number of job postings in the city in the year 2019.

Table 2: Top 10 industries by 2-Digit NAICS based on hiring demand in 2019

1	Finance and Insurance
2	Professional, Scientific and Technical Services
3	Health Care and Social Assistance
4	Retail Trade
5	Manufacturing
6	Educational Services
7	Accommodation and Food Services
8	Information and Cultural Industries
9	Transportation and Warehousing
10	Public Administration

Source: Vicinity Jobs

4.0 Employer Characteristics

Canadian Business Counts

Canadian business counts reported by Statistics Canada is an on-going count of active businesses by industry classification and employment-size categories for Canada, the provinces and territories. The counts are compiled from the Business Register, Statistics Canada's central listing of Canadian businesses. They are based on the statistical concept of "location"—that is, each operating location is separately counted, including cases where one business comprises multiple locations. There are two general industrial classification categories: "classified" that lists the existing category for businesses which have received a NAICS code and "unclassified" that lists new category for businesses which have not received a NAICS code.

On June 2019, there were a total of 109,212 businesses with employees versus 312,216 businesses without employees. 89% of the businesses with employees were classified versus the rest 11% that could not be classified. Existing category for businesses which have received a NAICS code are considered as classified businesses whereas new category for businesses which have not received a NAICS code is considered as unclassified businesses.

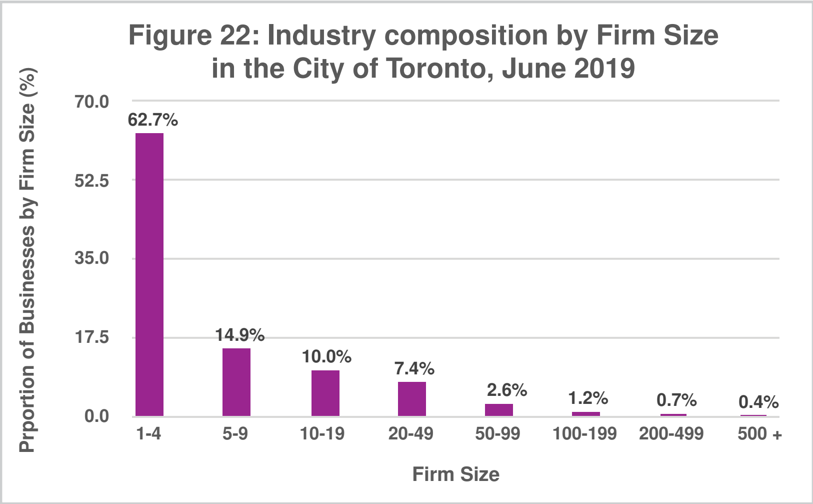
Innovation, Science and Economic Development Canada (ISED) businesses can be defined based upon the number of paid employees/sizes of the business. Accordingly, to ISED, based on the number of employees, businesses can be broadly categorized as:

- A small business-1 to 99 paid employees
- A medium-sized business-100 to 499 paid employees
- A large business-500 or more paid employees

Between June 2018 and June 2019, the number of classified businesses with employees in the City of Toronto increased by 3.8% compared to 1.3% increase the year before that.

4.0 Employer Characteristics

Figure-22 reports the industry composition by firm size (no of employees) in the City of Toronto as of June 2019. Based on the ISED definition, the City of Toronto's economy is mostly dominated by small-sized and medium-sized businesses that account for about 99.5% of the share of the total businesses. Between June 2018 and June 2019, only the share of businesses of size 1-4 employees increased from 58.6% to 62.7%. The share of businesses of all other sizes declined during this period. This means that the rise in the number of classified businesses with employees can be attributed to the increase in micro-sized businesses employing 1-4 employees.



Source: Statistics Canada, Canadian Business Count

4.0 Employer Characteristics

Table 3 below represents the number of businesses by the industry and size (measured by the number of employees in the business) in the City of Toronto for June 2018.

Table 3: Number of Businesses by Industry and Employee Size Range June 2019

	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Agriculture, forestry, fishing and hunting	451	124	80	22	15	6	1	0	0	0
Mining, quarrying, and oil and gas extraction	369	139	73	33	13	10	3	2	2	3
Utilities	401	65	34	2	10	11	3	0	1	4
Construction	21,516	6,639	4,400	1,112	552	361	121	58	28	7
Manufacturing	3,548	3,645	1,350	739	591	495	234	136	82	18
Wholesale trade	4,669	4,279	2,057	945	576	441	143	65	37	15
Retail trade	9,757	9,901	4,357	2,239	1,676	919	448	186	70	6
Transportation and warehousing	13,542	2,912	2,384	212	106	116	49	23	10	12
Information and cultural industries	7,658	2,958	1,836	371	269	248	123	50	37	24
Finance and insurance	24,525	4,836	2,527	754	695	490	181	88	56	45
Real estate and rental and leasing	78,531	6,512	4,954	679	473	238	95	46	22	5
Professional, scientific and technical services	42,937	18,846	14,266	1,882	1,246	894	286	149	92	31
Management of companies and enterprises	4,318	947	302	130	110	135	74	65	58	73
Administrative and support, waste management and remediation services	10,264	4,420	2,300	755	494	412	190	131	98	40
Educational services	3,199	1,519	658	276	216	198	93	38	22	18
Health care and social assistance	14,230	11,201	7,178	1,790	1,050	755	197	110	80	41
Arts, entertainment and recreation	7,663	1,578	970	210	132	167	40	21	21	17
Accommodation and food services	3,424	7,111	1,984	1,658	1,489	1,438	401	98	36	7
Other services (except public administration)	12,570	9,183	6,313	1,435	735	467	132	59	33	9
Public administration	26	297	114	47	41	36	23	9	11	16
Sub-Total Classified	263,598	97,112	58,137	15,291	10,489	7,837	2,837	1,334	796	391
Unclassified	48618	12100	10393	937	455	241	56	11	5	2
Total	**312,216**	**109,212**	**68,530**	**16,228**	**10,944**	**8,078**	**2,893**	**1,345**	**801**	**393**

Source: Statistics Canada, Canadian Business Count

4.0 Employer Characteristics

The top 10 industries with the highest proportion of businesses with employees in June 2019 were:

1. Professional, scientific and technical services (19.4%)
2. Health care and social assistance (11.5%)
3. Retail trade (10.2%)
4. Other services (except public administration) (9.5%)
5. Accommodation and food services (7.3%)
6. Construction (6.8%)
7. Real estate and rental and leasing (6.7%)
8. Finance and insurance (5%)
9. Administrative and support, waste management and remediation services (4.6%)
10. Wholesale trade (4.4%)

The top 10 industries with the highest proportion of sole proprietorship in June 2019 were:

1. Real estate and rental and leasing (29.8%)
2. Professional, scientific and technical services (16.3%)
3. Finance and insurance (9.3%)
4. Construction (8.2%)
5. Health care and social assistance (5.4%)
6. Transportation and warehousing (5.1%)
7. Other services (except public administration) (4.8%)
8. Administrative and support, waste management and remediation services (3.9%)
9. Retail trade (3.7%)
10. Arts, entertainment and recreation (2.9%)

4.0 Employer Characteristics

Table 4 below reports the change in the number of businesses with employees in the different industries between June 2018 and June 2019.

Table 4: Change in Number of Businesses by Industry, Toronto 2018-19

All Industries	June 2019 Total with employees	June 2018 Total with employees	Change in no. of businesses
Agriculture, forestry, fishing and hunting	124	97	27
Mining, quarrying, and oil and gas extraction	139	162	-23
Utilities	65	65	0
Construction	6,639	6,460	179
Manufacturing	3,645	3,602	43
Wholesale trade	4,279	4,307	-28
Retail trade	9,901	9,847	54
Transportation and warehousing	2,912	2,806	106
Information and cultural industries	2,958	2,903	55
Finance and insurance	4,836	4,742	94
Real estate and rental and leasing	6,512	5,633	879
Professional, scientific and technical services	1,8846	17,964	882
Management of companies and enterprises	947	935	12
Administrative and support, waste management and remediation services	4420	4,374	46
Educational services	1,519	1,459	60
Health care and social assistance	1,1201	10,680	521
Arts, entertainment and recreation	1,578	1,509	69
Accommodation and food services	7,111	6,903	208
Other services (except public administration)	9,183	8,835	348
Public administration	297	298	-1
Sub-Total Classified	**97,112**	**93,581**	**3,531**

Source: Statistics Canada, Canadian Business Count

4.0 Employer Characteristics

Based on the findings reported in Table 4, the top ten industries that experienced the largest increase in the number of businesses in the City of Toronto between June 2018 and June 2019 were:

1. Professional, scientific and technical services
2. Real estate and rental and leasing
3. Health care and social assistance
4. Other services (except public administration
5. Accommodation and food services
6. Construction
7. Transportation and warehousing
8. Finance and insurance
9. Arts, entertainment and recreation
10. Educational services

Only three industries in the City of Toronto experienced a shut down in the number of businesses between June 2018 and June 2019. They were: wholesale trade, mining, quarrying, and oil and gas extraction and public administration.

5.0 Analysis of Employment Ontario Program Related Data

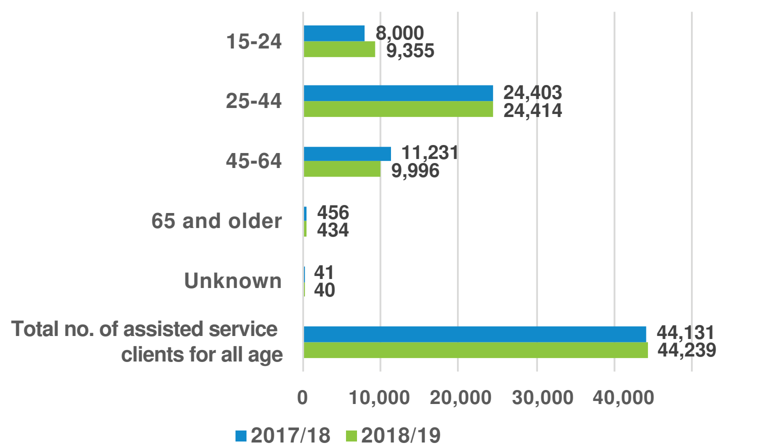
This section analyses Employment Ontario (EO) program data compiled and provided by the Ministry of Labour, Training and Skills Development in the year 2019. The data set covers program statistics related to Apprenticeship, Employment Service, Literacy and Basic Skills, Second Career, Youth Job Connection Program, Ontario Employment Clients and Canada Ontario Job Grant.

The data released offers broad insights into the client demographics, their levels of education at in-take and possible outcomes at exit. A thorough analysis around these elements have been conducted for the year 2018-19 for each of the seven programs run in Toronto with comparisons to the previous period's statistics.

Employment Services Clients

The Employment Services (ES) program responds to the employment needs of individuals in Ontario by providing information about who is hiring in their community, offering career counselling to help individuals assess their skills and experience, and provide employers with the help they need to hire individuals with the right skills. Figure 23 reports the changes in the assisted employment services clients by broad age categories between 2018-19 and 2017-18. Female clients (54%) continue to be the dominant users of these services versus male clients (46%).

Figure 23: Employment Services Clients by Age Category



Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data

In 2018-19, the total number of service clients that accessed Employment Ontario's suite of services were 159,171 of which (44,239 were assisted clients and 114,932 were unassisted clients). The number of assisted clients between 2017-18 and 2018-19 remained fairly steady with a slight increase of 0.2% only. However, during the same time period, the number of unassisted service clients increased by 4%.

Figure-23 above revealed that during this time, the usage of employment centres by youth (15-24 years) increased by 17%. This was in keeping with Toronto LFS data that points to a high youth unemployment rate. It could mean that apart from relying on the digital platforms as a resource to participate in the labour market, more and more youth are becoming aware of the employment service programs. In 2018-19, the top three designated groups of clients were internationally trained professionals (36%), newcomers (29%) and visible minorities (26%).

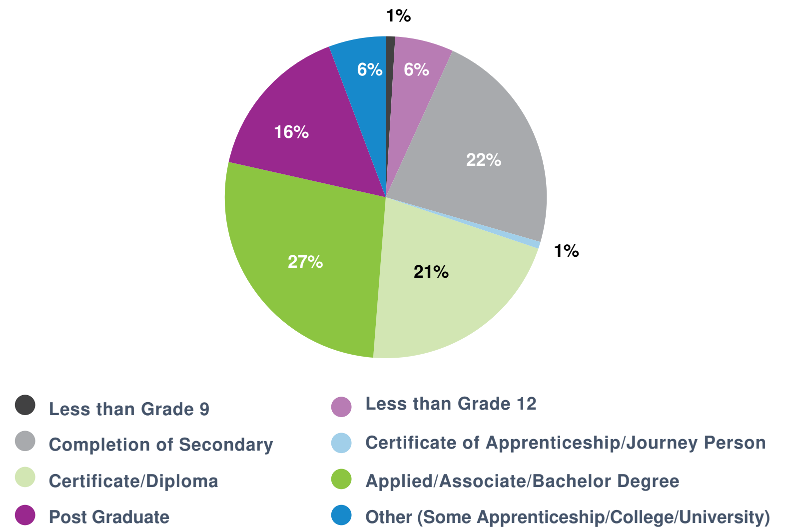
5.0 Analysis of Employment Ontario Program Related Data

Figure 24 represents the academic qualification of ES clients at intake. The majority of the clients have applied/associated/bachelor degrees (27%); certificate/diplomas (21%); and secondary education (22%).

A significant portion of clients having high levels of education is a reflection of clients in the designated categories like Internationally Trained Professionals and Newcomers. This supports the findings in Figure-13 of this report that suggests that a significant share of the labour force in Toronto has a bachelor's degree.

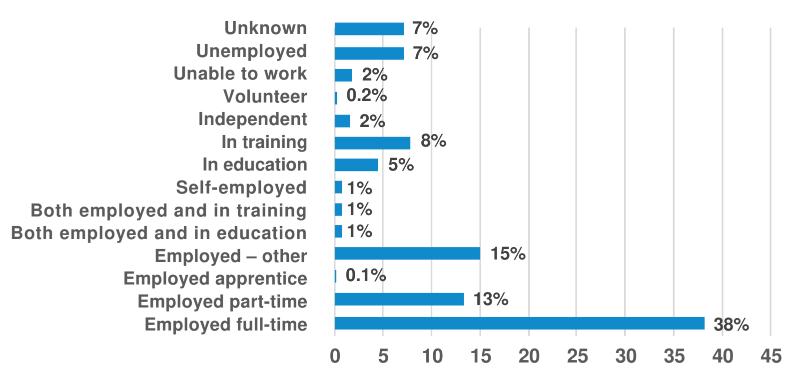
Figure 25 illustrates employment services clients' outcome at exit in 2018-19. Overall 70% of the clients successfully secured employment after exiting the program. A detailed breakdown of the outcome at exit has been reported in figure 25. Note that the category Employed, other (see figure 25) includes employment in a more suitable job, in a prof occ/trade, employed in area of training/choice. However, 7% of the clients were still unemployed after exiting the program and information for another 7% clients at exit were missing. 13% of the clients were either in education or training after exiting the program.

Figure 24: Education Level of ES Clients at Intake 18/19



Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data

Figure 25: Outcome of ES Clients 2018-19 at Exit



Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data

5.0 Analysis of Employment Ontario Program Related Data

Table 5: Top Employed Industry and Occupation at Exit 2018-19	
Top 5 employed industry outcome at exit	**Top 5 employed occupation outcome at exit**
Administrative and Support and Waste Management and Remediation Services	Service representatives and other customer and personal services occupations
Accommodation and Food Services	Service support and other service occupations
Health Care and Social Assistance	Administrative and financial supervisors and administrative occupations
Professional, Scientific, and Technical Services	Sales support occupations
Retail Trade	Office support occupations

Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data

Apprenticeship Program

Apprenticeship is a skilled trades training program wherein apprentices train on the job with qualified skilled workers for 85% to 90% of their program, and spend the remaining 10% to 15% of their program in classroom or online training[28]. Apprentices are usually required to complete three to four levels of schooling over the course of a two to five-year apprenticeship.

Table 6: No. of Clients in Apprenticeship Program		
	Toronto, 2018-2019	**Ontario, 2018-2019**
Number of New Registrations	3,645	27,821
Number of Active Apprentices	10,210	71,279
Number of CofAs Issued	1,382	9,878
Number of Modular Training Registrations	266	13,156

Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data

In 2018-19, 13% of Ontario's new registrations in Apprenticeship programs happened in Toronto. Between the years 2018-19 and 2017-18, the number of clients in all categories of apprenticeship program reported in table-6 increased as follows: New registration (17%), active apprentices (3%), CofAs issued (27%), Modular training (24%). Overall there was an 8% increase in the no of clients whose average age was 27 years. Of the new registrations, 50% fell in the age category 25-44 years followed by 46% in the age category 15-24 years and 4% in the age category 45-64 years.

5.0 Analysis of Employment Ontario Program Related Data

Table 7 below identifies a list of top 10 new registrations in trades. It appears that the list in 2018-19 remained fairly consistent when compared to 2017-18 except for two new trades that hit the top ten list were Steamfitter and Construction Craft Worker. The trade that exited this list was truck and coach technician.

Table 7: Top 10 New Registrations in Trade in Toronto

	2018-19		2017-18	
1	Electrician - Construction and Maintenance	746	Electrician - Construction and Maintenance	479
2	Plumber	476	Automotive Service Technician	403
3	Automotive Service Technician	438	Plumber	384
4	Hairstylist	261	Hairstylist	275
5	Sheet Metal Worker	254	Sheet Metal Worker	247
6	Construction Millwright	159	Construction Millwright	129
7	Child Development Practitioner	154	Child Development Practitioner	129
8	i. Steamfitter ii. Construction Craft Worker	103	Truck and Coach Technician	98
9	Ironworker - Structural and Ornamental	93	Architectural Glass and Metal Technician	92
10	Architectural Glass and Metal Technician	81	Ironworker - Structural and Ornamental	87

Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data

Canada Ontario Job Grant Program (COJGP)

The Canada-Ontario Job Grant (COJG) is an Ontario government funding program that allows employers to invest in their workforce by offering them training grants for their staff. Through the program, companies may receive non-repayable funding from the government to purchase third-party business training programs, including training for in-demand skillsets.

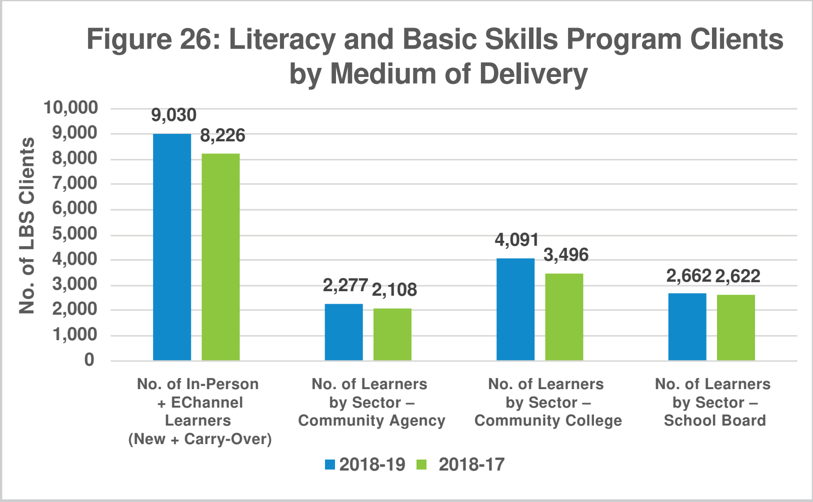
516 employers received the Canada Job Grant in 2018-19 for a total of 3,572 clients. The number of employers receiving the grant declined by 13% compared to the previous period. Share of employers receiving the COJG by employee size were: Less than 50 employees (64%); 50-150 employees (21%); 151-300 employees (6%); 301-550 (3%) and 501-1500 employees (4%). At exit, 93% of the trainees showed increase in productivity and 97% of these trainings meet workforce needs.

5.0 Analysis of Employment Ontario Program Related Data

Literacy and Basic Skills Program

The Literacy and Basic Skills (LBS) program helps individuals develop and apply skills like numeracy, interpersonal and digital skills to transition into employment, postsecondary, apprenticeship and secondary school. The program is delivered through colleges, school boards and community-based organizations.

The total number of LBS clients is made up of in-person learners or e-learners[29] either new or carried over. In 2018-19, LBS clients increased by 10% compared to the previous period. The proportion of the LBS program clients by age category in 2018-19 were: 15-24 years (24%); 25-44 years (51%); 45-64 years (22%) and 65+ years (2%). Figure-26 represents the LBS program clients by medium of delivery for two periods 2018-19 and 2017-18. Increase in the no of learners by these medium of deliveries were as follows: Community agency (8%), Community college (17%) and School board (2%). The share of LBS learners by streams in 2018-19 were anglophone (94%); deaf (1%); francophone (3%) and native (2%).



Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data

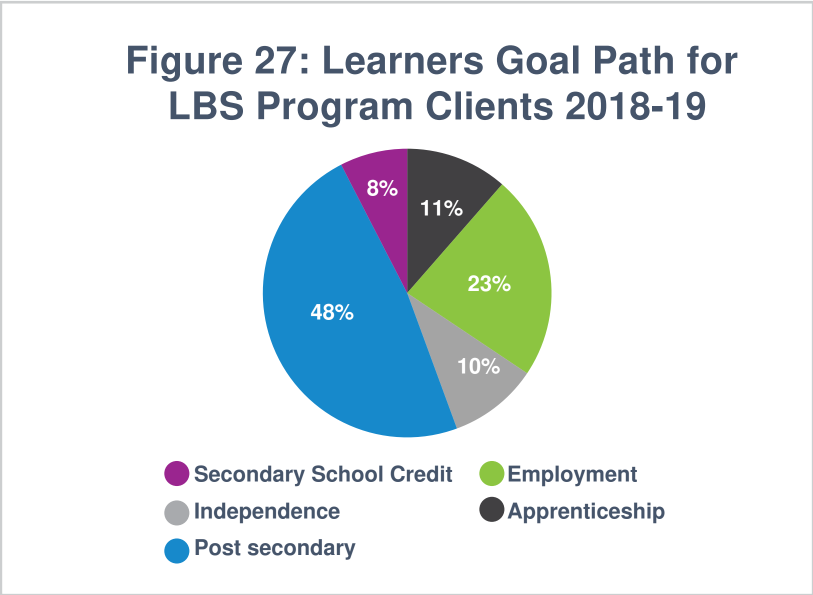
5.0 Analysis of Employment Ontario Program Related Data

Figure 27 illustrates data for the learner's goal path for the literacy and basic skills program clients in 2018-19. Every learner in the LBS program has a goal path it wants to achieve once leaving the program. It is the next step to which the learner transitions after completing the program. The goal path refers to the preparation required to exit LBS and transition to the goal. Among the five LBS goal paths post-secondary education consisted of the highest proportion of clients (48%); followed by employment (23%) and apprenticeship (11%). This share is persistent compared to the previous period.

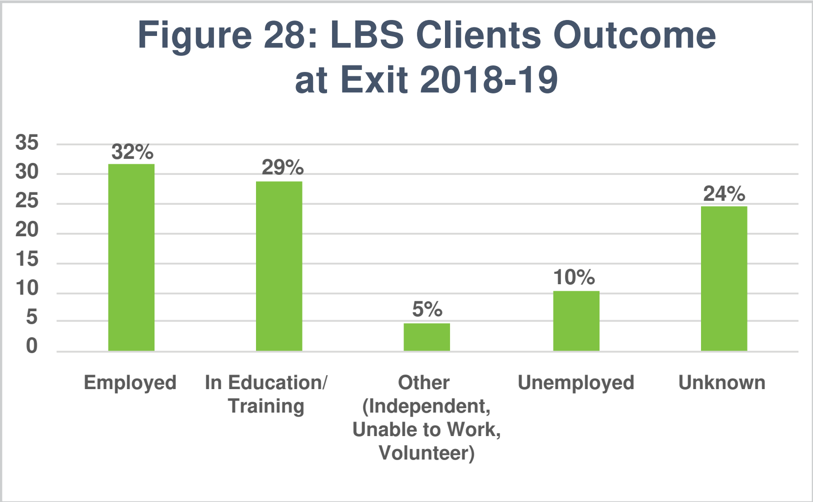
Figure 28 displays the outcome at exit for LBS program clients in 2018-19. A significant portion of the clients were either employed (32%) or in education/training (29%). However, 10% were unemployed at exit and 24% of the clients never reported the outcome at exit.

Second Career

The program Second Career offers laid-off workers with upskilling and training opportunities to help them find jobs in high-demand occupations, as well as provide them with the necessary financial assistance for tuition, books, transportation and a basic living allowance.



Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data



Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data

5.0 Analysis of Employment Ontario Program Related Data

In the year 2018-19 the number of clients under this program were 613 which was a 42% decline compared to the number of second career clients in the year 2017-18.

Table 8: The Top Approved Skills Training Program

2018-19	2017-18
Transport Truck Drivers	Accounting and Related Clerks
Early Childhood Educators and Assistants	Computer Network Technicians
Accounting and Related Clerks	Early Childhood Educators and Assistants
Social and Community Service Workers	Social and Community Service Workers
Computer Network Technicians	Transport Truck Drivers

Source: Ministry of Labour, Training and Skills Development, Employment Ontario Data

Transport and Truck drivers jumped all the way to top the skills training program list for the year 2018-19. There were no new occupations that were added or excluded from the top five list between 2018-19 and 2017-18. A large portion of the second career clients (33%) didn't report on their outcome at exit. Clients who reported by the following categories were: employed (20%), unemployed (36%), in education (8%) and others who were independent, unable to work or volunteering (2%).

Youth Job Connection Program

The Youth Job Connection program is designed to support multi-barriered youth aged 15-29 years by offering them intensive supports beyond traditional job search and placement opportunities. In 2018-19, the Youth Job Connection program served 3,173 clients of which 75% fell in the age category 15-24 years and 25% fell in the age category 25-44 years. Clients identified themselves in the following designated groups: visible minority (52%), person with disability (19%), newcomer (17%), internationally trained professionals (9%) and francophones (3%).

Ontario Employment Assistance Services

Ontario Employment Services offers financial support to organizations that deliver employment services to unemployed people with disabilities[30]. In 2018-19, a total of 2,144 clients were served by the program which was an increase by 11% compared to the previous period. There were slightly more male clients than female majority of whom lied in the age group 25-44 years. 27% of these clients had no source of income with 24% relying on Ontario Works (OW) and another 24% relying on Ontario Disability Support Program (ODSP) as a source of their income.

6.0 Where We Were 2019-2020

CAMH Education and Information Fair

This was the fifth consecutive year, TWIG partnered with CAMH for the Employment & Education Fair hosted by the Social Determinants of Health (SDH) Service. The fair featured employers (non-profit, academic and social businesses) who support equitable hiring, practices and mentally healthy workplaces. The fair attendees included job seekers, students and education seekers, people who are eager to learn about opportunities and resources relating to employment and people who are contemplating future career goals. The information fair for CAMH clients offered opportunities to break down barriers to employment, education and housing for people experiencing issues related to mental health and addiction.

Warehousing and Distribution Industry Analysis

A key function to the logistics process is Warehousing and Distribution. Although this industry is a micro component of the sector Transportation and Warehousing it is becoming an increasingly predominant industry on the face of the rise of e-commerce and appears to be experiencing an unprecedented era of dynamism. This report uses both quantitative and qualitative approach to offer insights on the skills and scope of work requirements within key occupations in the industry and the impact of accelerated technology in the near future. Key players in the warehousing and distribution industry like employers in the industry, recruiting agencies serving this industry by connecting the employers and job seekers and subject matter experts who have extensive knowledge in supply chain management were interviewed on workforce gaps and challenges and how automation will play a critical role in shaping the labour need of the warehousing and distribution industry.

Creating Pathways to Mobility

This report was an extension of a study on newcomer's relocation decision conducted by TWIG last year. While the big cities or the larger communities don't necessarily face difficulties filling in job vacancies, rural/remote and small-town communities in Ontario with lower birth rates, an aging population, and an increased out-migration are causing employers to struggle to fill vacant positions. In a time where there is a lot of precarity in the GTA and rising income inequality, channeling human resources where their skills are needed the most is crucial for the economy. This study explored how the hard to serve, multi-barriered workforce like racialized person/visible minority, person in conflict with the law and woman trying to flee violence view relocation to smaller communities in Ontario for the purpose of better employment opportunities. The objective is to get an in-depth understanding of the barriers, challenges, incentives, and opportunities that may effect the willingness/ ability of this group of the workforce to relocate.

6.0 Where We Were 2019-2020

Construction Industry Training Programs

Ontario's construction workforce has been on the steady rise over the past 10 years and Toronto is no exception. This deliverable engaged with EO networks, employers and community networks to bring awareness about the programs and opportunities available to build a career in the industry. The objective was to ensure a greater understanding of the apprenticeship and trades process by EO providers and job seekers.

In-Demand Skilled Trades

Over the fall and winter of 2019-20, TWIG conducted the In-Demand Skilled Trades Analysis project based on the guidelines and directive of the Ministry. The goal of the project was to better understand and validate the demand for labour and specific skills and to further understand the experience of employers related to the skilled trades and finding and training talent. As part of the project, we engaged with employers in the Automotive Repair, Residential Construction, Heavy Civil Construction: Road and Sewer Construction, Electrical, Manufacturing, Early Childhood Educators / Childhood Development Practitioners and Landscape and Horticulture trades. A total of 194 employers were engaged through interviews, focus groups and surveys. Although the findings from the engagement identified several trends among employers, they should not be applied as representative of the entire sector and all employers. Based on the engagements, specific findings identified large needs among employers in specific areas of highly skills as well as unskilled work, and in positions that were apprenticeable as well as those that were not, but in high demand, such as construction general labourers and manufacturing production workers. Across all of the engagement, there was strong support for: 1.) increase education and awareness among job seekers and students to promote career pathways in-demand trades and trade related occupations, including support to enhance the consistency and quality of high school programs like OYAP and SHSM and build on existing best practice programs; 2.) an increase in the number of funded training seats and availability of training that is delivered to industry standard and provides new entrants with hands-on experience and realistic expectations of what they can expect on-the-job; and 3.) centralized industry specific support for recruitment, on-the-job training and apprenticeship coordination, including through apprenticeship group sponsor programs. Among the recommendations and identified trends, there are several opportunities for enhance support and new initiatives in order to prepare people for in-demand jobs in the skills trades.

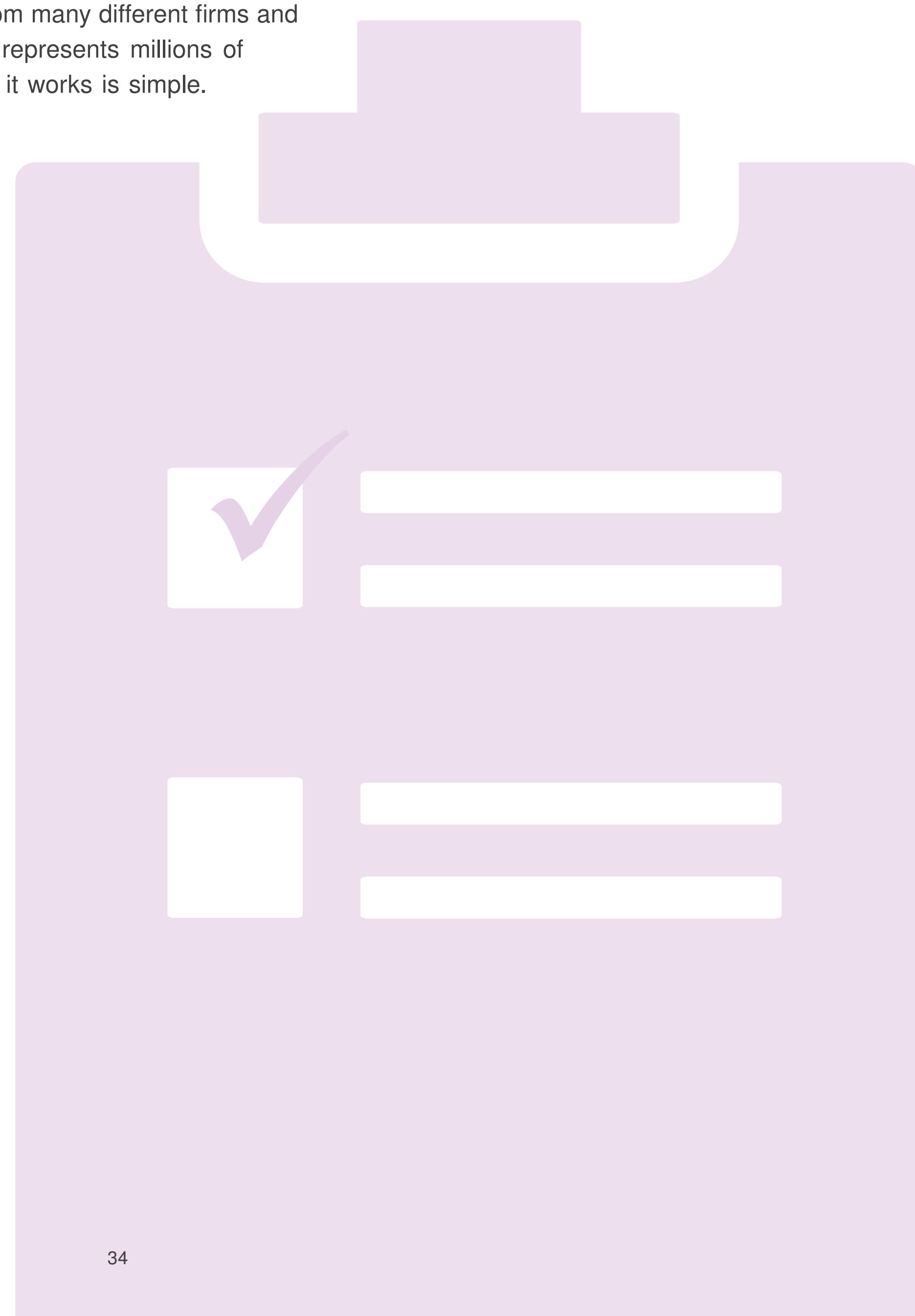
Business Improvement Areas (BIA)s in Toronto

There are a significant number of Business Improvement Areas in Toronto that plays a critical role to the city's economic and cultural vitality. TWIG partnered with some of these BIAs to disseminate information through social medical campaign informing local employment/training service delivery agencies about the culture and needs of their local businesses.

6.0 Where We Were 2019-2020

Micro-tasking Platforms

Understanding the technology industry and technology jobs is critical for workforce planning. TWIG's Microtasking Project takes a look at the work that is enabled by technology platforms. Microwork (or crowdsourcing) platforms are a new type of intermediary. They support a marketplace where individuals and businesses can outsource small isolated tasks. This project is looking at microtasks, which we define as: found and undertaken on an internet platform work that is not part of the standard employment relationship, involves taking on short tasks (i.e. 15 minutes to a few hours) completed by a micro jobber, someone who takes on tasks from many different firms and people. Microwork is an invisible workforce. It represents millions of people worldwide who work on platforms. How it works is simple. People access the platform to perform tasks, usually for small amounts of money. Two of the dominant platforms are Figure Eight and Amazon Mechanical Turk. There's little in the way of qualitative data on microwork in Toronto. So, TWIG used foresight methodology for this project. This will lead to strategic perspectives on micro tasking and workforce development. The website, microtasking.ca, is an online resource that features research findings, articles, interviews, and a toolkit for planners. All the resources are also downloadable in a single report from the website.



7.0 Action Plan and Stakeholder Consultations

Every year, Toronto Workforce Innovation Group (TWIG) engages the community in a comprehensive consultative process and collaborates with economic development departments, municipalities, employment service providers, employers, job seekers and other key stakeholders in the labour market. This helps to identify, validate and prioritize key labour market issues, opportunities and challenges that prevail in the local economy. The Action Plan of TWIG is informed by the latest labour market analysis and challenges and opportunities that stemmed from the consultations and community collaborations we have done over the past year.

There were a number of persistent local issues identified this year that our conversations with stakeholders and partners were eager to discuss. Some obvious broad trends were: diversity/inclusion, social responsibility related to diversity, automation/AI/machine learning, alternative work (freelance, contract, gig employment) now being mainstream, employee wellness (including mental health) & human focused organizations and influencer marketing.

Existing studies have identified that employers in Ontario and Canada are finding it challenging to filling positions in the skilled trades. To add local perspectives to the understanding of the labour market conditions for the skilled trades in Ontario, TWIG conducted an in-Demand Skilled Trades Project engaging local employers. In almost all discussions with employers across sectors, they felt that young people and students were either not aware of the career pathways in their industry, or were not interested in them, which was contributing to their labour shortages. Specially, employers discussed the disconnection between what is being taught in high school and the lack of people pursuing work in the trades. Employers also discussed challenges with education and training programs that were not preparing students with a realistic expectation of what they will experience on the job (e.g.– the requirement to work outside in bad weather).

The following skilled trades positions were identified as hardest to fill:

- Automotive Service Technician
- Crane Operator
- Mainline Operators
- Electricians
- Trim Carpenters
- Landscape Technicians
- Automotive Service Technician Apprentices
- Electrician Apprentices.

Among almost all employers there was a request to fund more apprenticeship seats in college or union training centres, as there was a general feeling that these classes were full or oversubscribed and not meeting demand.

7.0 Action Plan and Stakeholder Consultations

The advent of new technologies and globalization continues to shape how businesses work today. With technologies enabling remote working, TWIG conducted a study on Microtasking that takes a look at the work that is enabled by technology platforms. Microwork (or crowdsourcing) platforms are a new type of intermediary that support a marketplace where individuals and businesses can outsource small isolated tasks.

According to a 2019 Metcalf report[31], the number of working poor[32] in the Toronto region has been increasing at an alarming rate and the racialization of working poverty in the Toronto CMA among both the immigrant population and those born in Canada is very striking. Despite this rising precarity in the Toronto region, more and more people continue to crowd the metropolitan areas in the hope of securing standard employment. The scenario is different in small town Ontario where more and more employers over a period of time are facing long-term challenges filling in vacant positions. On the face of such findings, a potential match between the skills demanded by employers in the small-town communities and the skills and experiences that can be offered by the multi-barriered individuals from the metropolitan cities could generate economic and social benefits for both the parties. Using a qualitative approach, TWIG collated information on the latest labour market trends in non-metro Ontario with knowledge on the labour market opportunities, priorities, and challenges facing some small-town Ontario communities. TWIG also held focus group discussion and one-on-one telephone interviews with the multi-barriered job seekers who resided in the Toronto, CMA.

Participants who have mostly lived in larger cities all their lives had very limited knowledge about small town communities in Ontario. It appeared that participants' opinions were generalized for all small-town communities. TWIG held a workshop with these job seekers residing in Toronto, CMA to share labour market information about non-metro Ontario. For the majority of respondents in the FGD, relocation was circumstantial. They emphasized how it's really an array of considerations and not just a high paying job offer that would incentivize them to relocate to a smaller community.

This year TWIG also did an industry analysis of warehousing and distribution centres. With rapid growth in e-commerce, businesses are often considering warehousing and distribution center operations as an integral part of the company's business strategy and it is often included among the industries that will be transformed radically by technology.

7.0 Action Plan and Stakeholder Consultations

TWIG conducted a semi-structured interview of employers, recruiting agencies and subject matter experts to gain a better understanding of the warehousing and distribution industry and the impact of accelerated technology in the industry processes and its workforce.

Experts in supply chain management speculated that there could be potential skills gap for the requisite skills needed to fill in managerial level positions in the warehousing industry. These managerial positions will require holistic skills and interdisciplinary understanding needed to integrate the hardware and software of these facilities. It also appeared that most businesses were unaware of the available government training funds or knowledge-based resources that can create a critical pathway to connect these businesses with government funding resources to foster innovation and workforce development in the industry.

Moving forward, TWIG will continue to generate job demand/skills demand reports and infographics outlining the hard and soft skills required in occupations from prominent sectors in the local labour market and disseminate the information to job seekers and employment service providers. We look forward to evaluate the potential for greater collaboration with the University of Waterloo to do a study on worker deliberation in Crowd Work. There are also initiations to sketch proposals for workforce development ecosystem map and identify the best fields to study for jobs of the future.

For the upcoming projects, we will have working groups composed of Industry, academicians, lived experience experts, government officials/ policy makers and funders. Using a network of employers, representative of the local labour market TWIG will continue to gather intelligence on skills gaps, employee engagement and employment trends that will assist community stakeholders in development of programs and resources to meet employer needs.

End Notes

1. City of Toronto. 2020. Toronto Employment Survey 2019. Retrieved from https://www.toronto.ca/wp-content/uploads/2020/01/9453-Toronto-Employment-Survey-2019-Bulletin.pdf

2. City of Toronto. 2020. Toronto Employment Survey 2019. Retrieved from https://www.toronto.ca/wp-content/uploads/2020/01/9453-Toronto-Employment-Survey-2019-Bulletin.pdf

3. Retrieved from https://www.thestar.com/business/technology/2019/07/16/toronto-now-ranked-one-of-top-three-tech-cities-in-north-america.html

4. Retrieved from https://www.blogto.com/city/2019/09/toronto-ranked-most-liveable-cities-world/

5. This sector includes subsectors such as information technology, legal services, accounting, engineering and technical services, architectural and interior design services, management consulting and research and development.

6. Ontario Ministry of Finance. *2019. Ontario Population Projections, 2018–2046*. Retrieved from Ontario Ministry of Finance https://www.fin.gov.on.ca/en/economy/demographics/projections/

7. Clayton, F., & Shi, H,Y. 2019. Centre for Urban Research and Land Development at Ryerson University. Retrieved from https://www.ryerson.ca/cur/Blog/blogentry35/

8. The difference between the number of live births and the number of deaths during the year. The natural increase (or natural decrease) is negative when the number of deaths exceeds the number of births.

9. Intra-provincial migration occurs when a person moves to a different city, town, township, village or Indian reserve within Canada but stayed within the same province or territory

10. Interprovincial migration occurs when a person moves to a different city, town, township, village or Indian reserve within Canada, and changed province or territory

11. Net international migration is obtained according to the following formula: Immigrants + returning emigrants + net non-permanent residents – (emigrants + net temporary emigration).

12. The unemployment rate is the number of unemployed people as a percentage of the labour force (employed and unemployed)

13. Vital signs report 2019/20 Retrieved from https://www.communityfoundations.ca/wp-content/uploads/2019/10/Toronto-VitalSigns2019.pdf

14. CBC NEW. Don Petitis, July 5, 2018. Opportunity knocks for youth as unemployment expected to stay at record lows. Retrieved from https://www.cbc.ca/news/business/youth-employment-jobs-1.4731868

15. The employment rate is the number of employed people as a percentage of the population aged 15 and older.

16. City of Toronto. 2019. Toronto Employment Survey 2018. Retrieved from https://www.toronto.ca/legdocs/mmis/2019/ph/bgrd/backgroundfile-130549.pdf

End Notes

17. The **participation rate** is the number of employed and unemployed people as a percentage of the population

18. Statistics Canada. 2019. *The labour force in Canada and its regions: Projections to 2036*. Retrieved from https://www150.statcan.gc.ca/n1/pub/75-006-x/2019001/article/00004-eng.htm

19. OECD (2001): Education at a Glance: OECD Indicators, Paris

20. European Commission (2002): Key Data on Education in Europe, Luxembourg

21. OECD (2001): Education at a Glance: OECD Indicators, Paris

22. Vital signs report 2019/20 Retrieved from https://www.communityfoundations.ca/wp-content/uploads/2019/10/Toronto-VitalSigns2019.pdf

23. Statistics Canada. 2019. *The gender wage gap in Canada: 1998 to 2018.* Retrieved from https://www150.statcan.gc.ca/n1/pub/75-004-m/75-004-m2019004-eng.htm

24. Rocha, R., & Loewen, C. Nov 28, 2017. Immigrant wages rising, but gaps with Canadian-born earners persist. CBC News. Retrieved from https://www.cbc.ca/news/canada/montreal/immigrant-wages-canada-1.4421783

25. Retrieved from https://www.conferenceboard.ca/(X(1)S(15my32ldxxz2tvtqhytttx32))/hcp/provincial/society/immigrant-gap.aspx?AspxAutoDetectCookieSupport=1

26. This sector includes subsectors such as information technology, legal services, accounting, engineering and technical services, architectural and interior design services, management consulting and research and development.

27. Randstad Canada (2020). Retrieved from: https://www.randstad.ca/best-jobs/top-15-jobs/?utm_campaign=2019-074-BEST-JOBS&utm_source=hs_email&utm_medium=email&utm_content=82252079&_hsenc=p2ANqtz-_Y_O9U2DKWbF4bfi_Ywbu4wkrUqcPaY7KNP9drQ4NvOR9DcD7NwFQeVj6RpbIu81gOFKI9YIx3XOuap7a4UJ1vDUX-w6anKtZmXr1jbLWIci_DoW8&_hsmi=82252079

28. Retrieved from http://www.tcu.gov.on.ca/eng/eopg/publications/appr-resource-eo-sp-en.pdf

29. Note that MTCU EO data was available for in-person clients only.

30. Ontario Ministry of Training, Colleges and Universities. 2016. Retrieved from http://www.auditor.on.ca/en/content/annualreports/arreports/en16/v1_304en16.pdf

31. Stapelton, J., James, C. & Hope, K. (2019). *The Working Poor in the Toronto Region: A closer look at the increasing numbers.* Retrieved from Metcalf Foundation https://metcalffoundation.com/site/uploads/2019/11/Working-Poor-2019-NEW.pdf

32. The Metcalf defines working poor as someone who has an after-tax income below the Low-Income Measure (LIM),has earnings of at least $3,000 a year, is between the ages of 18 – 64, is not a student, and lives independently.