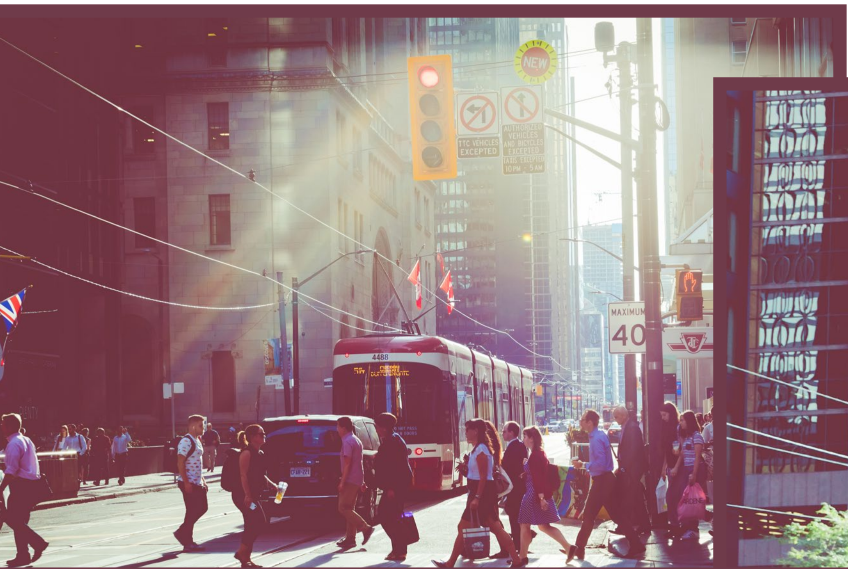
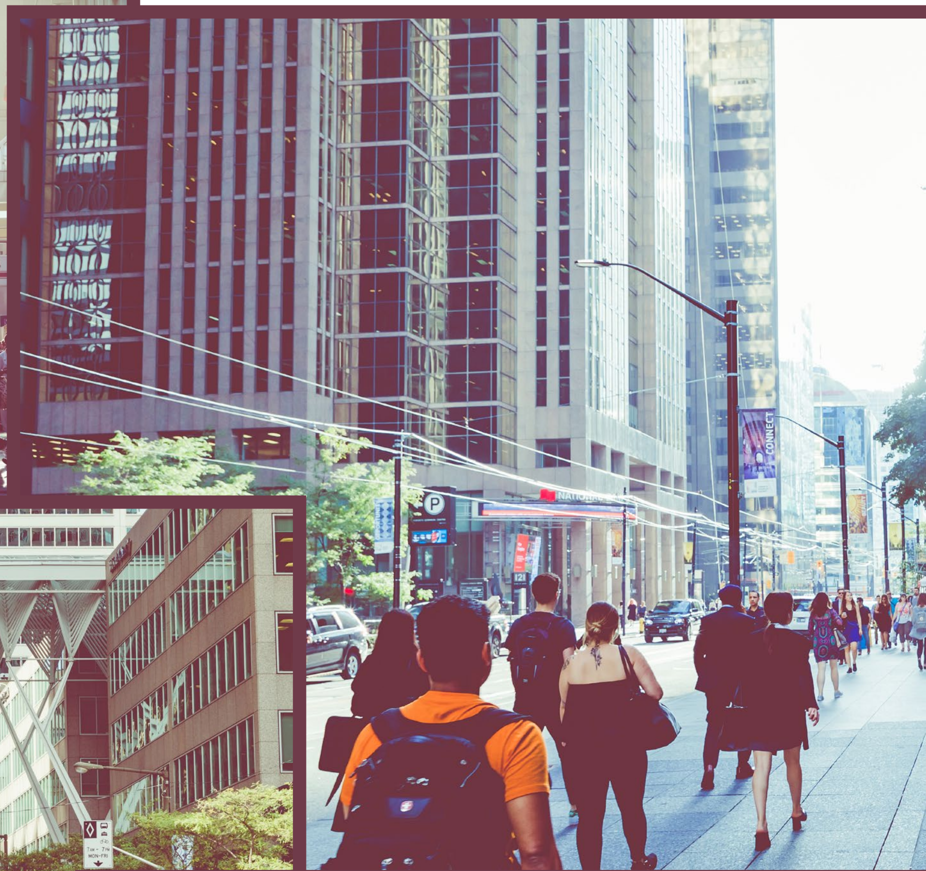
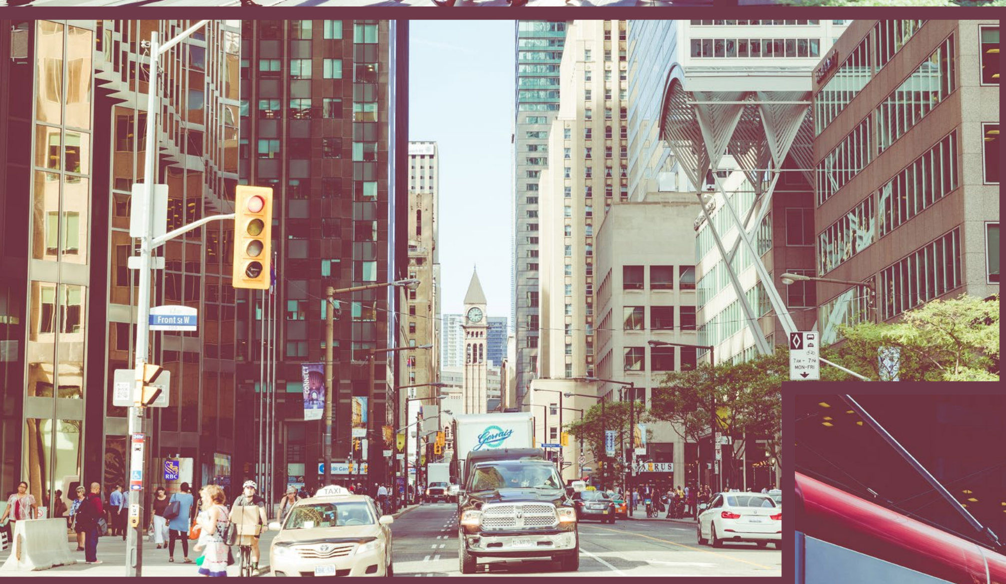
TWIG TORONTO WORKFORCE INNOVATION GROUP







Local Labour Market Plan 2018-2019

About the Toronto Workforce Innovation Group

Toronto Workforce Innovation Group 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 Training, Colleges and Universities (MTCU) 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. We are, as always, grateful for the support of the Ministry of Training, Colleges and Universities 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.

We aim to continue providing our communities with valuable labour market information. Please give us feedback by completing the 2018 Local Labour Market Plan Report survey.

Survey

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Toronto's Economy at a Glance, 2017-2018

Toronto has one of the most diverse economies in North America and is considered the major economic engine of the country. It is home to half of Ontario's labour force and businesses; industries here account for nearly 50% of the province's GDP. In the last three years, the average annual economic growth in Toronto accelerated to 3.7%, but is expected to slow down to 2.08% over the next five years (2018-2022) [1].

The Economist's Intelligence Unit's 2018 Global Liveability Report[2] ranks Toronto as the seventh most livable city in the world, down three spots from 2017. The City of Toronto is Canada's largest city with a population of 2.9 million residents, making it the fifth most populous city in North America. In 2017, the population in the City of Toronto was 20.6% of the population in all of Ontario.

International immigration is the main driver of population growth in the City of Toronto. In the past five years Toronto experienced a population growth rate of 5.4% and based on the annual demographic estimates of the past five years, Toronto, CMA is on the path of having more individuals over the age of 60 years. The age category that underwent the largest growth in population (37%) were residents aged 90+ years.

According to the Census 2016, majority of the residents in the City of Toronto (51.5%) identified themselves as visible minorities. While diversity increased in every census division in the GTA from 2011 to 2016, the numbers varied widely. The higher proportions (more than 50%) of diversity[3] were concentrated in the inner suburbs of Scarborough, North York and Etobicoke.

The unemployment rate (7.2%) for city residents in 2017 was slightly higher than the national unemployment rate of Canada (6.3%). Although youth unemployment (13%) has steadily declined over the past ten years it is still twice that of the overall unemployment rate. The labour market conditions for newcomer immigrants have improved. In 2017, for the first time in 12 years the unemployment rate for recent immigrants dropped below double-digits to 9% in Toronto, CMA.

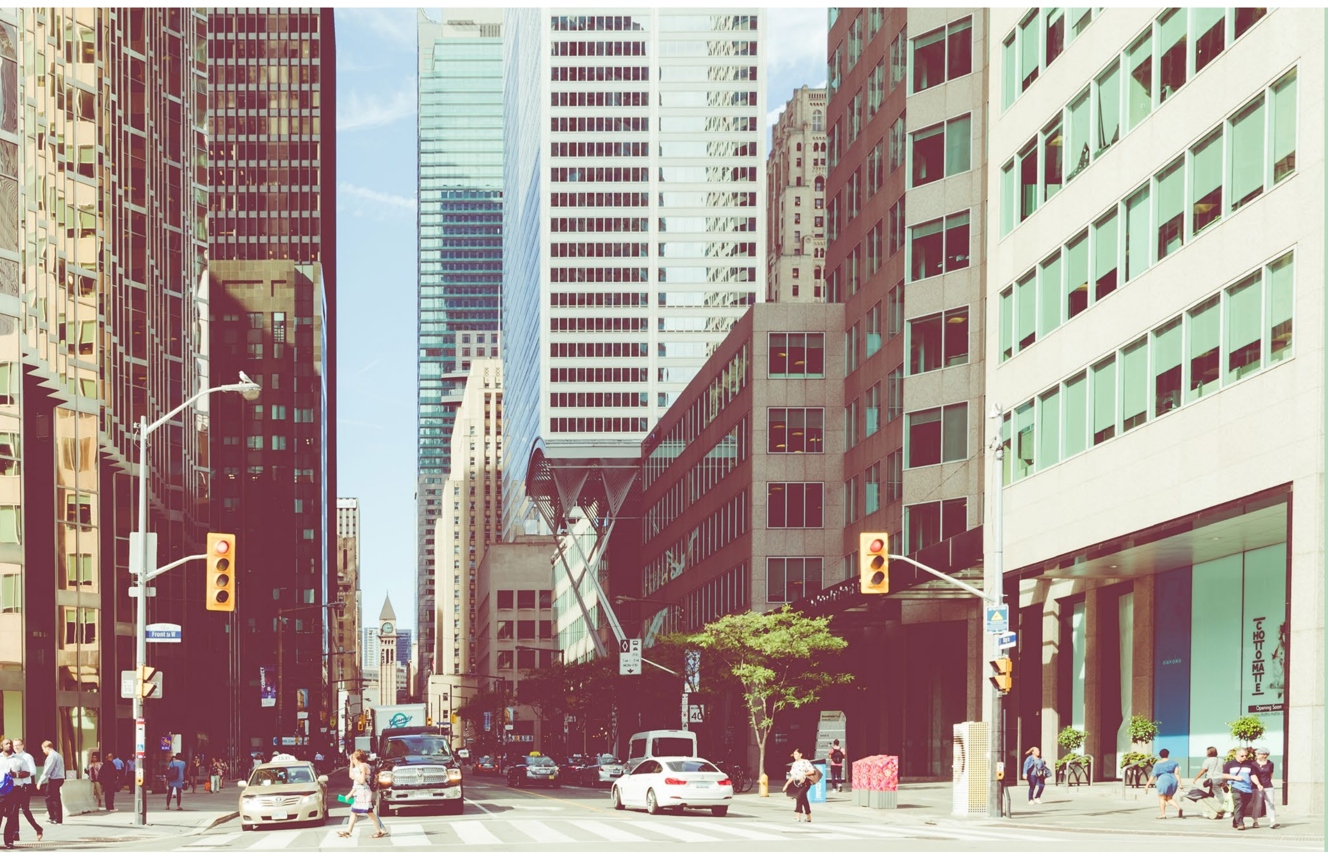
According to the Labour Force Survey (LFS), in 2017, the employment rate in the City of Toronto[4] was 60.5%. Toronto Employment Survey[5], 2017 recorded 1,518,560 jobs in the City of Toronto, a gain of 57,550 jobs or 3.9% from 2016. During this year, the top five NAICS sector with the greatest share (49.8%) of all employment in the City of Toronto were Health care and social assistance, Professional, Scientific and technical services, Finance and insurance, Retail trade and Educational services.

A recent report[6] by Coldwell Banker Canada Inc. (CBRE) stated that in the past five years, Toronto has added the most technology jobs (82,100) to beat out the San Francisco Bay Area to become the fourth-best tech talent market in Canada and the U.S.

It appears that the city's labour force has become increasingly educated over the last ten years. In 2017, 70% of the labour force comprised of individuals with a university degree or a post-secondary certificate or diploma compared to 66% in 2008. During the same year, 71% of all employed in the City of Toronto, either had a university degree or post-secondary certificate or diploma, and only 2% of those employed did not complete high school.

Methodology

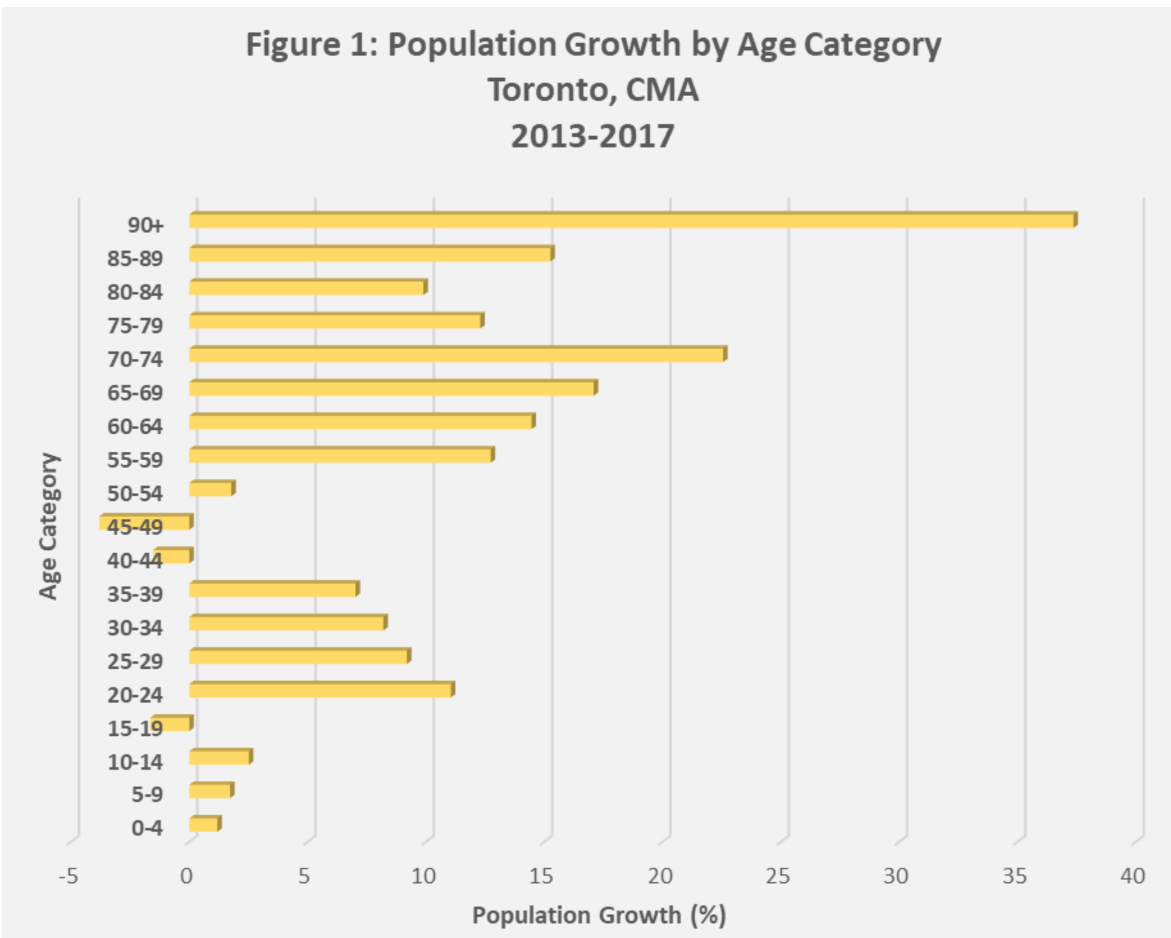
Information for this report is collected through a variety of data sources, including Statistics Canada (Canadian Business Patterns, Census 2016, Job Vacancy and Wage Survey and the Labour Force Survey), City of Toronto (Toronto Employment Survey, Toronto Economic Bulletin), the Ontario Ministry of Finance 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. 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. Finally, we look at ongoing and emergent trends effecting industry, employment and working conditions.



Labour Force Characteristics

Population

- Based on annual demographic estimates of the past five years (see Figure-1 below), Toronto, CMA is on the path of having more and more individuals over the age of 60 years.
- In 2017, Toronto, CMA had a population of 6,346,088 that comprised of 44.7% of the population in Ontario. During the same period, the population in the City of Toronto was 2,929,886 which was 20.6% of the population in the province.
- Between 2013-17, the population growth rate in Toronto, CMA for all age groups were 6.3%. Figure 1 below illustrates the population growth by broader age category in the past five years.



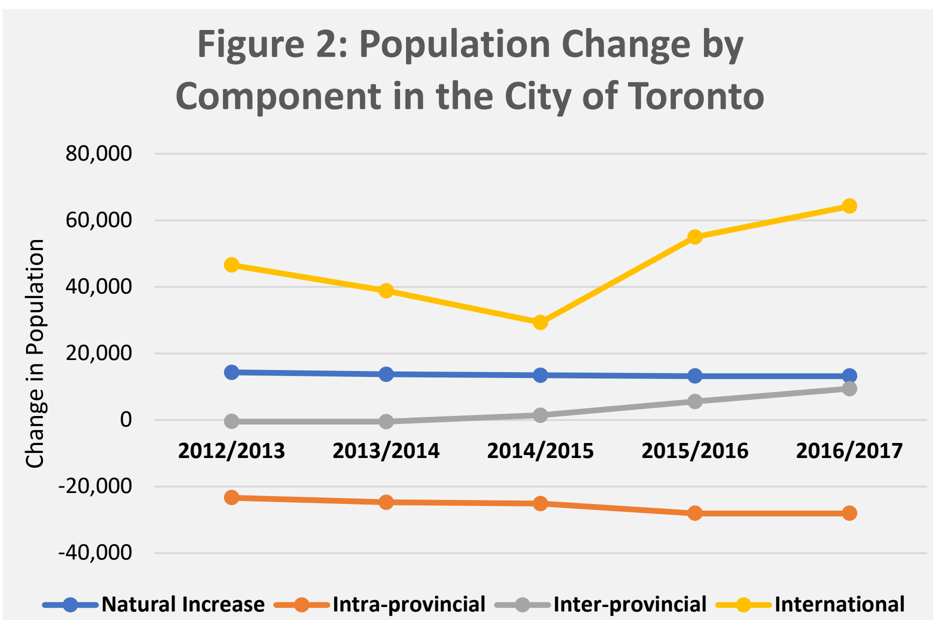
Source: Statistics Canada. Table 17-10-0078-01. Annual demographic estimates by census metropolitan area, age and sex, based on the Standard Geographical Classification (SGC) 2011

The top three age categories with the greatest growth in population between 2013-17 were 90+ years (37%); 70-74 years (23%) and 65-69 years (17%).

- During the same time period, youth in the age category 15-19 years experienced a negative growth in population (-2%) versus a positive growth rate (11%) for the youth in age category 20-24 years.
- Prime working age category of 25-39 years experienced a positive population growth hovering around (7-9%) whereas those falling on the higher end of the spectrum of age category of 40-50 years experienced a decline in population growth between (1-3%).
- Mature workers in the age category 55-64 years experienced a significant growth in population of (12-14%).
- In 2017, the proportion of total population 15 years and over in the labour force were 65% in the City of Toronto and 66% in Toronto, CMA.

Components of Population Change

Figure 2 below breaks down the change in population in the City of Toronto between the year 2012 and 2017 by four components: natural increase[7], intra-provincial migration[8], inter-provincial migration[9] and international migration. While the natural increase in population stagnated over time, there was an increasing outflow of population from the City of Toronto following intra-provincial migration. On the contrary, the rate at which people entered the city from another province exceeded the rate at which people left the city to move another province. International immigration is the main driver of population growth in the City of Toronto. Between the years 2014-2017, there was a significant rise in this particular component of population growth.



City of Toronto, Economic Development and Culture Division

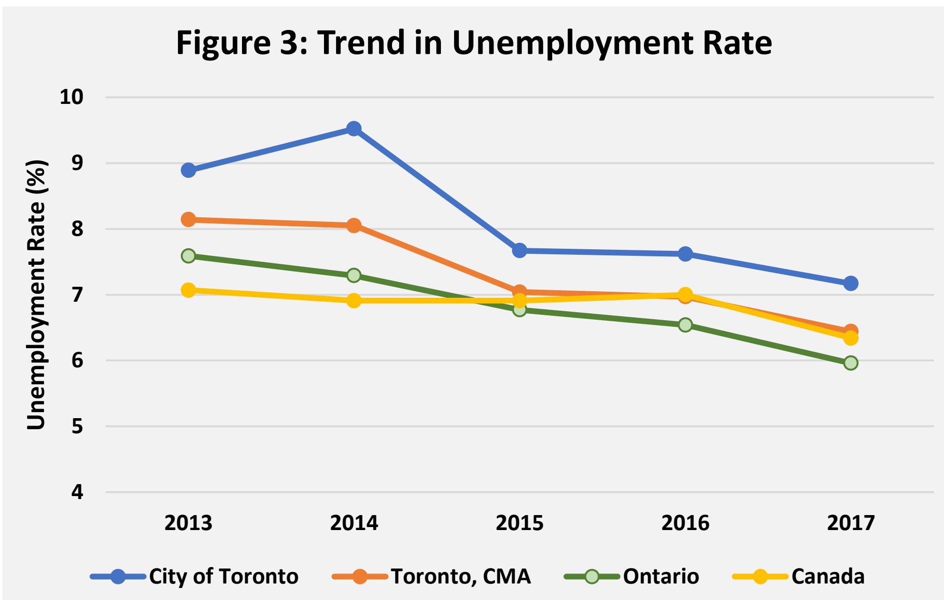
Almost 30 percent of Canada's immigrants made Toronto their new home[10] between 2001 and 2016. According to the census data, in the last five years, Toronto attracted more than three-quarters of all immigrants to Ontario[11]. Between 2011-16, 400,950 people moved into the City of Toronto. Of this, 35% were migrants from within Ontario, 11% were from other provinces and the rest were from outside Canada[12]. Within the GTHA, the city has the highest proportion of recent immigrants at 8.5% of the city's population.

Labour Force Activity

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.

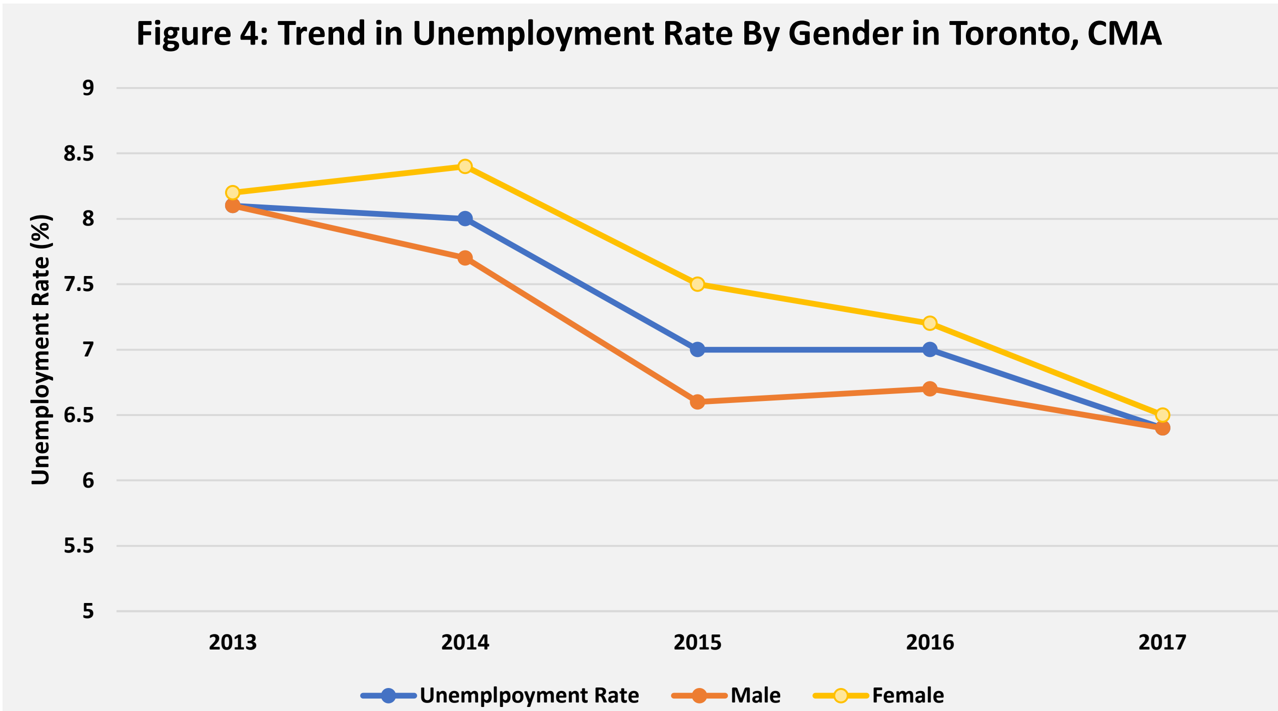
Unemployment Rate

In 2017, a total of 1,624,558 residents (or 65%) of the total population in the City of Toronto aged 15 years and over were in the labour force. 51.6% of those in the labour force were male and the rest were female. During the same year, in Toronto, CMA, the percentage of population aged 15 years and over that were part of the labour force was 66% versus 65% for the province of Ontario and 66% in Canada.



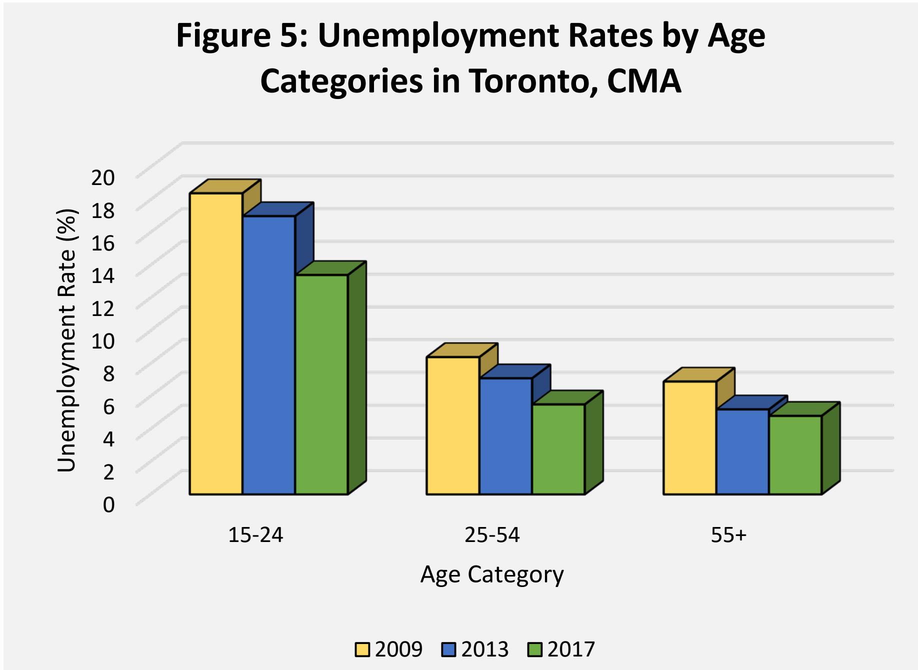
Source: City of Toronto, Labour Force Survey Summary

Figure 3 compares the unemployment rate[13] in the last five years for four levels of geography- Canada, Ontario, Toronto, CMA and the City of Toronto. Unemployed individuals are the unused supply of labour in the labour force[14]. For the given number of years in the above figure, the level of unemployment rate has always been the highest in the City of Toronto relative to Toronto, CMA, Ontario and Canada. This indicates that compared to the other geographies illustrated, a much larger portion of the city's labour force were willing and able to work but were unable to secure a position effectively. However, the unemployment rate declined steadily over the past five years for all levels of geography. In 2017, the unemployment rate in the City of Toronto[15] was 7.2% less than 8.9% in the year 2013.



Source: Statistics Canada. Table 14-10-0096-01. Labour force characteristics by census metropolitan area, annual.

Based on the past five years of analysis depicted in Figure 4, unemployment rate in Toronto, CMA have been more prevalent among females in the labour force. However, this difference between male and female unemployment is seen to reduce over time. In 2017, the female unemployment rate was 6.5% whereas the male unemployment rate was 6.4%.



Source: Statistics Canada. Table 14-10-0096-01. Labour force characteristics by census metropolitan area, annual

Figure 5 reports unemployment rates by broad age categories in Toronto, CMA for the past ten years with five-year intervals indicating a persistent decline in the unemployment rates of all age groups. However, the unemployment rates have been significantly high for youth residents (15-24 years) compared to the other age categories.

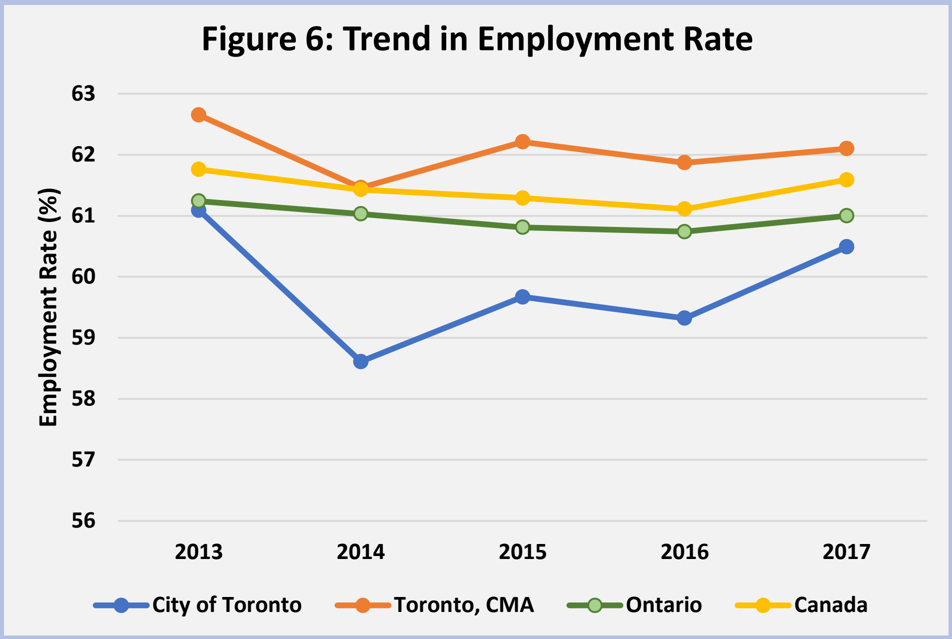
In 2017, the unemployment rate for the age category 15-24 was 13% versus 18% in the year 2009. Despite this decline, the youth unemployment rate is still twice double that of the unemployment rate for the total labour force in Toronto, CMA. According to a latest Stats Can report[16], this could be explained by several factors. Whenever firms implement layoffs based on seniority rules, young workers are more likely to be terminated. In addition, young workers are overrepresented in small firms, that tend to exert higher than average layoffs. Finally, at the beginning of their career, youth workers change jobs more frequently than older workers, looking for a position whose requirements fit their skills and work-life balance best thus leading to unemployment rate.

Canadian Centre for Policy Alternatives (CCPA) report, The Young and the Jobless: Youth Unemployment in Ontario by Goebey (2013)[17] states that the coordination between employers, organized labour and educational institutions have been key for countries with low youth unemployment rate. The OECD countries like Austria, the Netherlands, Japan, Germany and Switzerland with low youth unemployment rates all have strong apprenticeship and work placement systems. Ontario has some similar initiatives in place, such as apprenticeship programs, but should take steps in making greater use of these systems and initiatives.

The unemployment rate for the prime-working age category (25-54 years) also fell from 8.4% in 2009 to 5.5% in 2017. Mature workers (55+ years) also experienced a decline in unemployment rates from 6.9% in 2009 to 4.8% in 2017.

Employment Rate

Figure 6 below illustrates the trend in the employment rate[18] between the year 2013 and 2017 for four levels of geography. It appears that the employment rate has steadily increased starting from 2014 in the City of Toronto and Toronto, CMA. In 2017, the employment rate in the City of Toronto[19] was 60.5% and in Toronto, CMA was 62.1%.



Source: City of Toronto, Labour Force Survey Summary

In 2017, the Toronto Employment Survey[20] recorded 1,518,560 jobs in the city of Toronto, a gain of 57,550 jobs or 3.9% from 2016. According to the same source, 74.3% of this total employment were full-time versus 25.7% part-time. Between 2016-17, part-time employment increased by a higher percentage of 4.4% compared to a rise in full-time employment of 3.8%. The Toronto Employment Survey, 2017 also reported the employment share and employment growth by the North American Industrial Classification System (NAICS) in the City of Toronto.

In 2017, the top five industries with the greatest share (49.8%) of all employment in the City of Toronto were:

- Health Care and Social Assistance
- Professional, Scientific and Technical Services
- Finance and Insurance
- Retail Trade
- Educational Services

The top sectors with the greatest job growth in the year 2017 included:

- Administrative and Support, Waste Management and Remediation Services (adding 8,410 net jobs or 12.4%)
- Finance and Insurance (adding 7,350 net jobs or 5.1%)
- Educational Services (adding 6,610 net jobs or 5.8%)

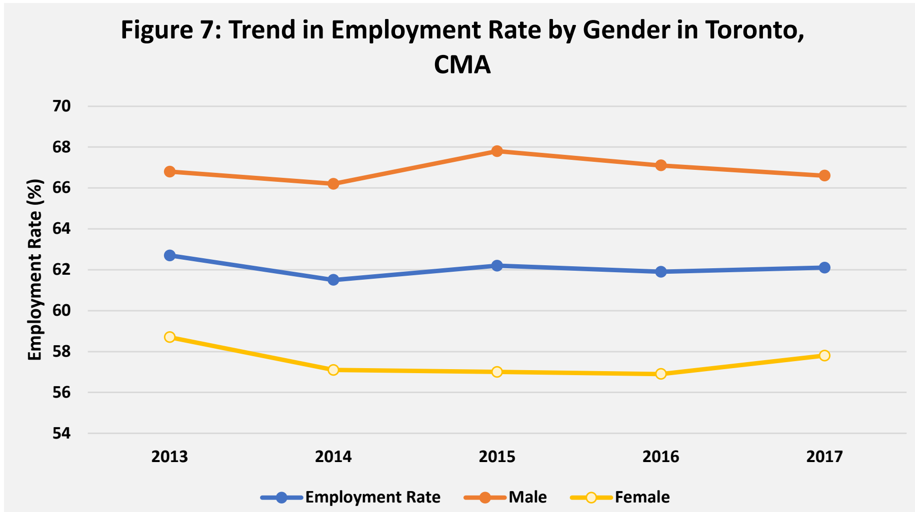


Figure 7: Statistics Canada. Table 14-10-0096-01. Labour force characteristics by census metropolitan area, annual

Figure 7 indicates that for the years analyzed in this report, there is a significant gap in female and male employment rates with some sign of the two rates converging over time. In 2017, the employment rate in Toronto, CMA was 62.1% for all residents aged 15 years and over. During this year, male employment rate was 66.6% while the female employment rate was 57.8%. According to a latest report by the Ontario government[21] there are insufficient options for child care and elder care, resulting in women doing more unpaid caregiving and having less time for paid work.

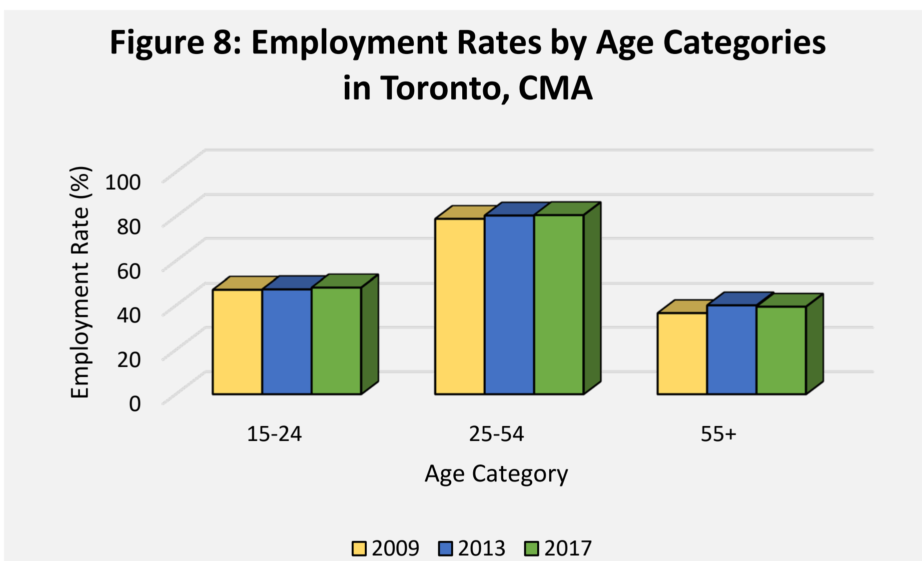
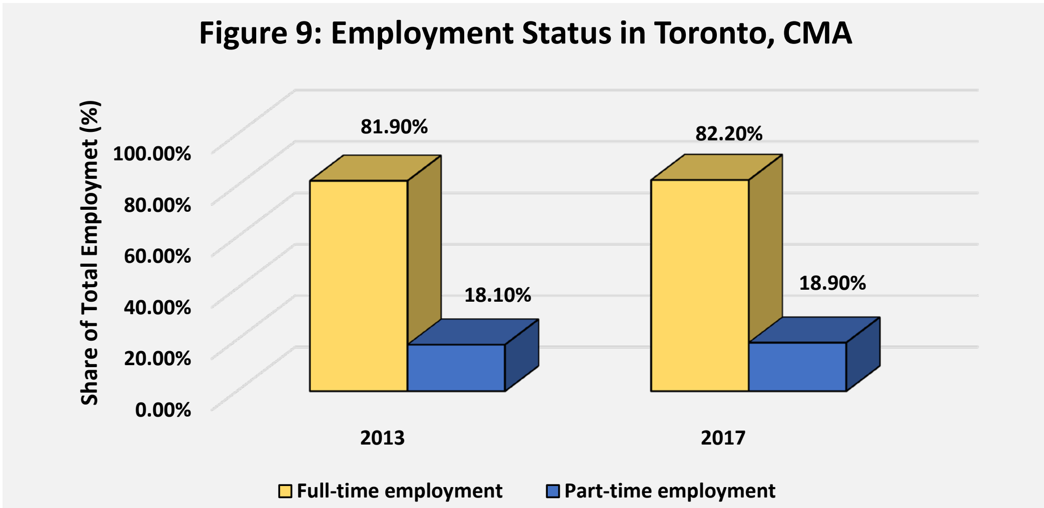


Figure 8: Statistics Canada. Table 14-10-0096-01. Labour force characteristics by census metropolitan area, annual

Figure 8 represents the employment rates by broad age categories. Employment rates for all age categories have gone up in the past ten years. The employment rate for prime-working age in 2017 is 81% significantly higher than the total employment rate of 62% for all ages in Toronto, CMA. On the contrary, the employment rate for youth residents (15-24 years) and mature residents (55+ years) are 48% and 39.5% respectively considerably lower than the total employment rate in Toronto, CMA.

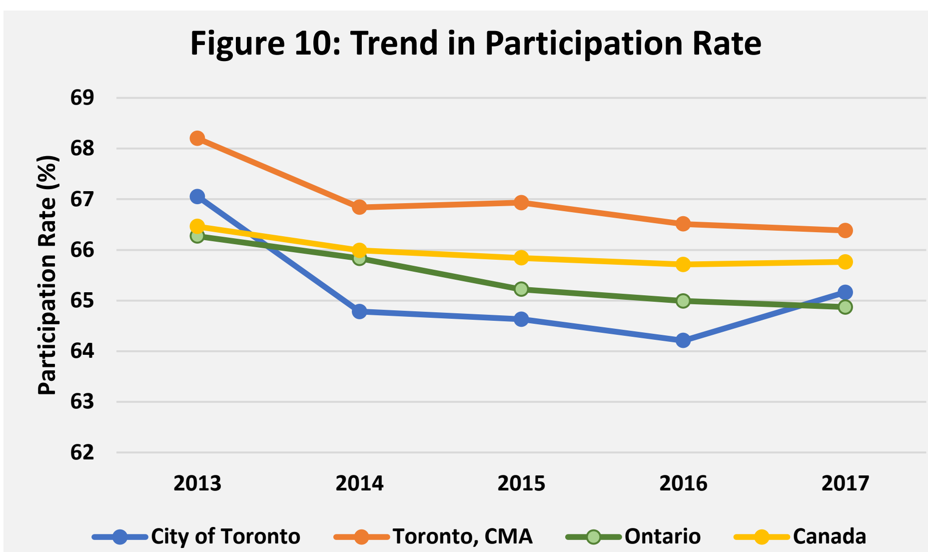
Figure 9 reports the employment status of working Torontonians: full-time[22] versus part-time jobs. In aggregate, the percentage of people employed full time has increased slightly since 2013. For groups who have a strong attachment to the labour market, the proportion employed full time, apart from the unemployment rate, is an important dimension along which success can be gauged.



Source: Statistics Canada. Table 14-10-0096-01. Labour force characteristics by census metropolitan area, annual

Participation Rate

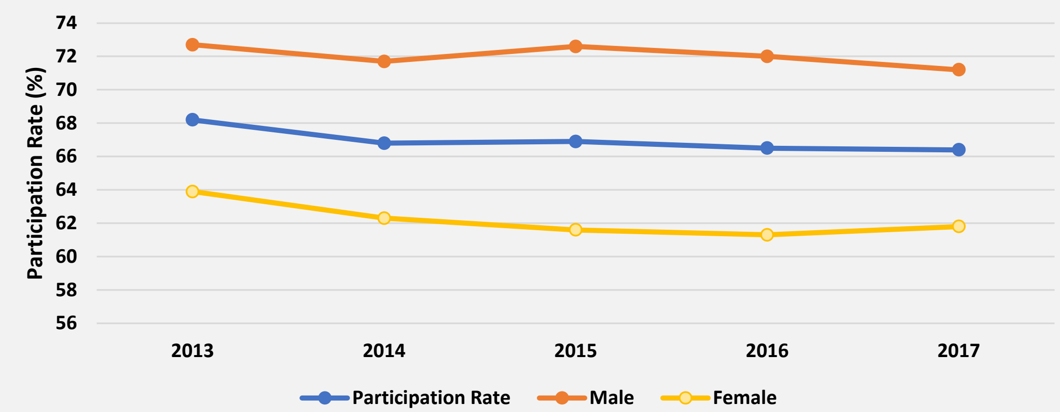
Figure 10 below depicts the trend in the labour force participation rate of people aged 15+ years for four levels of geography in the past five years. Analysis using the labour force survey data reveals that the participation rate has been the highest in Toronto, CMA for all the years compared to country, province and city level.



Source: City of Toronto, Labour Force Survey Summary

There is seemingly an impact of an aging labour market given the falling trend in labour market participation rate. According to a latest report by Statistics Canada[23], other factors like education and family responsibilities may also affect the participation rate. Rising school attendance among younger populations could have a negative impact since students participate less than non-students. Marital status and the presence of children can also have an impact on labour market participation. In 2017, the participation rates in the City of Toronto[24] was 65.2% versus 67.1% in 2013. This was higher than the provincial rate but lower than Toronto, CMA and Canada.

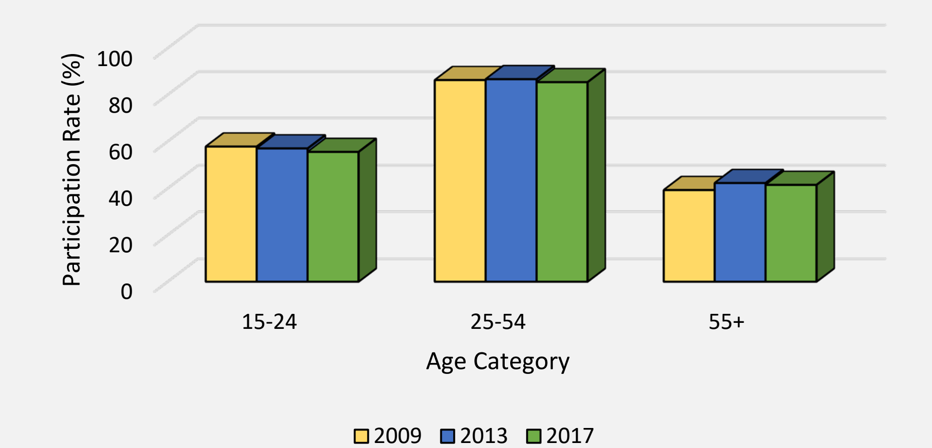
Figure 11: Trend in Participation Rate by Gender in Toronto, CMA



Source: Statistics Canada. Table 14-10-0096-01. Labour force characteristics by census metropolitan area, annual

As illustrated by Figure 11, the labour market participation rate have steadily declined for both genders in the past five years in Toronto, CMA. In 2017, the participation rate for all working age populations in Toronto, CMA was 66.4%, a 1.8 percentage point decline compared to the year 2013. The participation rate was 71% for male and 62% for female in 2017, a 2-percentage point decline compared to 2013.

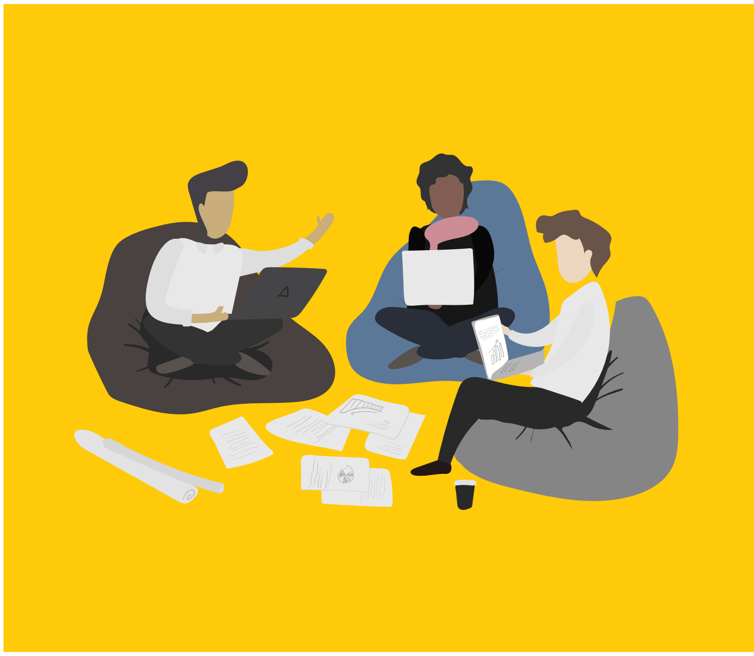
Figure 12: Participation Rates by Age Categories in Toronto, CMA

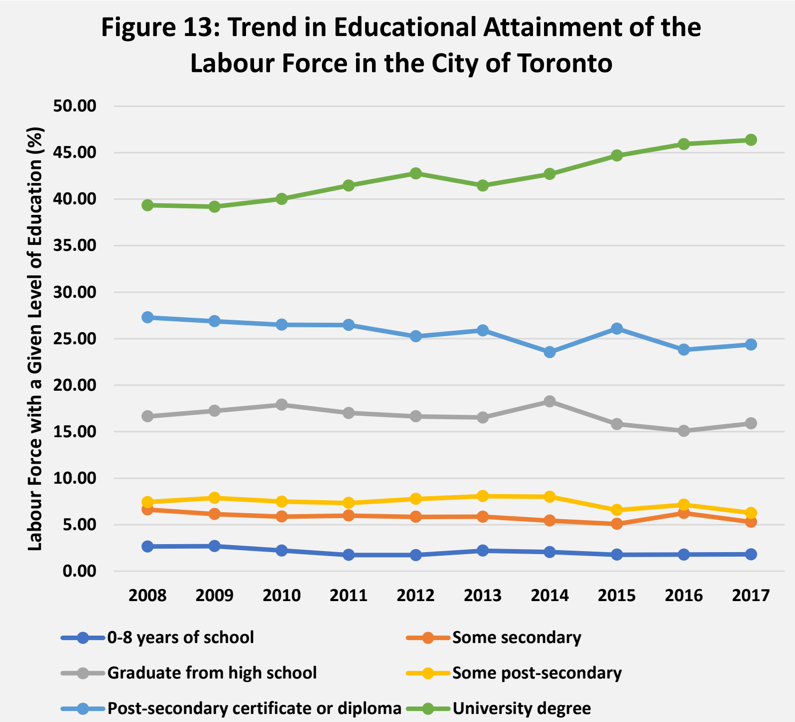


Source: Statistics Canada. Table 14-10-0096-01. Labour force characteristics by census metropolitan area, annual

Figure 12 reports labour market participation rates by broad age categories over the past ten years with five-year intervals. The participation of youth (15-24 years) have declined over time from 57.8% in 2009 to 55.5% in 2017. Similarly, the participation rate for prime working age population (25-54 years) has also declined from 86.3% in 2009 to 85.4% in 2017. A rising level of educational attainment in Toronto, CMA suggests that more people in this age category are engaged in full-time education effecting labour force participation.

On the contrary, mature residents aged (55+ years) have higher rates of participation rate increasing from 39.3% in 2009 to 41.5% in 2017. This suggests that mature workers now make a large portion of the working age population in Canada. According to a latest Stats Can report[25] in 2016, Canadians aged 55 and over accounted for 36% of the working-age population (aged 15 and over), up from 30% in 2007 and noticeably higher than the average of 25% through the 1990s. Based on the same study, factors that led to the rising participation rate among mature workers are higher levels of education, better health, presence of children in the household, lower levels of wealth (due to lower rates of return on assets or rising debt) or simply more and/or better employment opportunities.





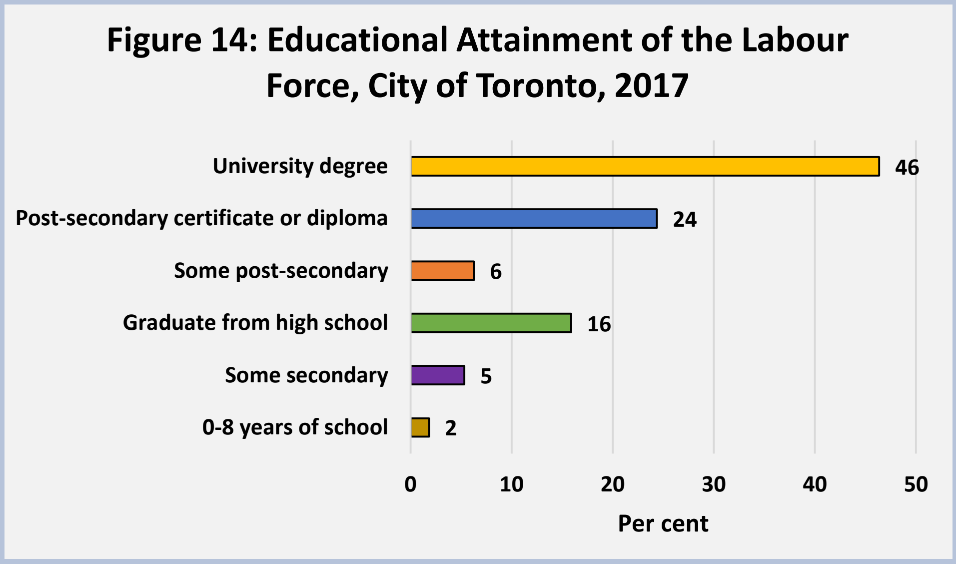
Source: City of Toronto, Labour Force Survey Summary

Labour Force by Levels of Education

Educational attainment of the labour force can largely influence the labour market status in an economy. Figure 13 represents the trend in educational attainment of the labour force in the City of Toronto over the past ten years. LFS data analysis reveals that the city's labour force has become increasingly educated over the last ten years. Since 2008, university and post-secondary certification or diploma are the two levels of education that made up the largest share of the city's labour force compared to all other major categories of educational attainment.

Between 2008 and 2017, the share of the labour force made up of people with a university degree has grown consistently, from 39% in 2008 to 46% in 2017. Over the same time period, the proportion of people with other types of educational attainment declined by 1-3 percentage point.

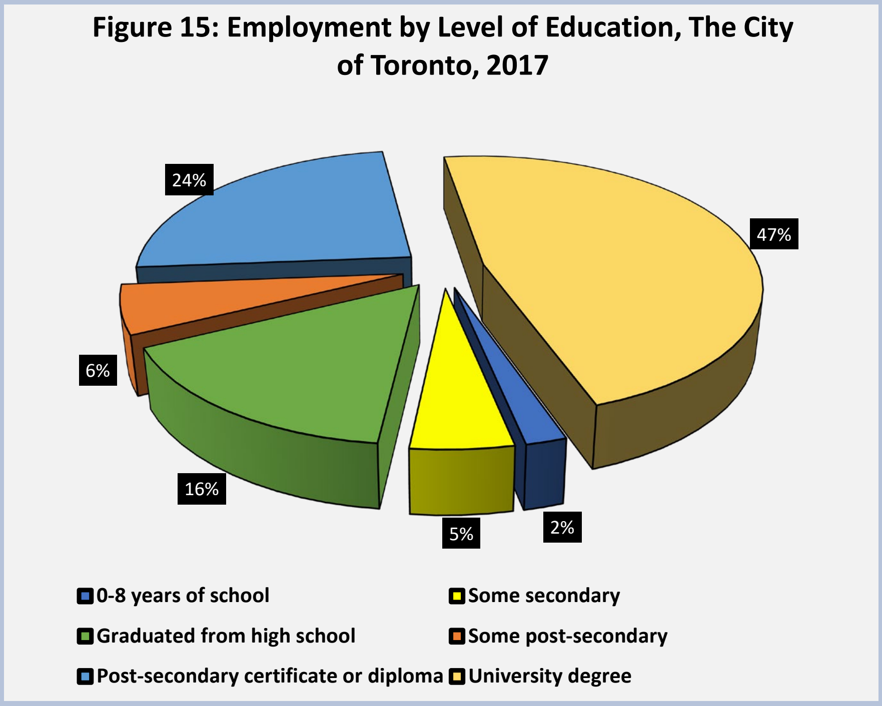
Figure 14 below highlights the educational attainment of the labour force in the City of Toronto for the year 2017. In 2017, 70% of the labour force comprises of individuals with a university degree or a post-secondary certificate or diploma.



Source: City of Toronto, Labour Force Survey Summary

Employment by Level of Education

In general, people with higher levels of education have better job prospects. Figure 15 below illustrates the educational qualifications of the employed residents in the City of Toronto in the year 2017.
Data analysis using the LFS revealed that 71% of all employed in the City of Toronto in the year 2017 either has a university degree or post-secondary certificate or diploma. Only 2% of those employed did not complete high school.



Source: City of Toronto, Labour Force Survey Summary

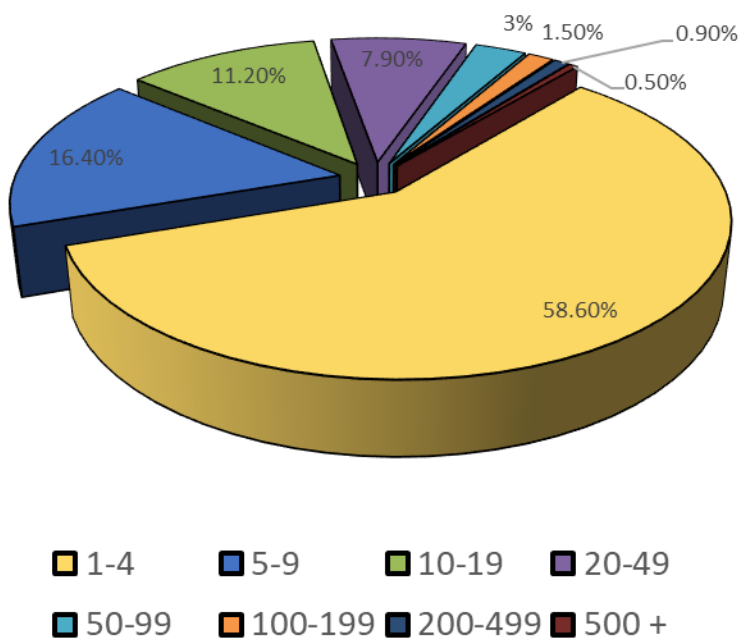
Employer Characteristics

Canadian Business Counts

Statistics Canada[26] maintains an on-going count of active businesses by industry classification and employment-size categories for Canada and 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.

As of June 2018, there were a total of 106,274 businesses with employees in the City of Toronto. Of this, 93,581 businesses were classified with employees were as the rest were unclassified. During the same time period, there were a total of 300,298 businesses without employees of which 248,721 were classified.

Figure 16: Proportion of Businesses by Firm Size in the City of Toronto, June 2018



Source: Statistics Canada, Canadian Business Count

Figure 16 represents the share of businesses by firm size in the City of Toronto as of June 2018. Small size firms (1-4 employees) continued to make up the largest share (58.6%) of businesses with employees as of June 2018. Although firms with 500+ employees had the least share of business (0.5%), based on Table 1 below, between June 2017 and June 2018, this size of firms experienced the largest percentage increase in the number of businesses (10.3%). However, in terms of an absolute number, it was the small sized firms (1-4 employees) that increased by the largest units, 625 businesses.

Table 1: Change in Number of Businesses[27] By Employee Size, Toronto 2017-18

No of employee/Firm Size	Jun-17	Jun-18	% Change 2017-18
1-4	54,229	54,854	1.2
5-9	15,337	15,337	0.0
10-19	10,047	10,522	4.7
20-49	7,380	7,439	0.8
50-99	2,867	2,800	-2.3
100-199	1,340	1,361	1.6
200-499	802	827	3.1
500 +	400	441	10.3
Total	92,402	93,581	1.3

Source: Statistics Canada, Canadian Business Count

Table 2 below represents the number of businesses by the industry and employee size in the City of Toronto for June 2018. It lists businesses that are classified and that have employees.

Table 2: Number of Businesses by Industry and Employee Size Range June 2018

	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Professional, scientific and technical services	17,964	13,579	1,830	1,173	812	312	152	74	32
Health care and social assistance	10,680	6,846	1,752	1,080	583	191	114	74	40
Retail trade	9,847	4,288	2,352	1,724	883	385	141	71	3
Other services (except public administration)	8,835	5,950	1,482	730	444	125	64	30	10
Accommodation and food services	6,903	1,928	1,615	1,471	1,386	360	109	29	5
Construction	6,460	4,194	1,101	577	362	128	62	27	9
Real estate and rental and leasing	5,633	4,027	672	473	256	123	50	18	14
Finance and insurance	4,742	2,436	718	701	472	184	96	76	59
Administrative and support, waste management and remediation services	4,374	2,200	786	514	408	181	138	105	42
Wholesale trade	4,307	2,063	931	617	431	154	64	33	14

Manufacturing	3,602	1,300	755	580	500	241	124	83	19
Information and cultural industries	2,903	1,734	450	256	214	119	71	36	23
Transportation and warehousing	2,806	2,259	211	129	104	51	28	13	11
Arts, entertainment and recreation	1,509	928	193	128	162	35	28	23	12
Educational services	1,459	618	279	214	195	86	27	26	14
Management of companies and enterprises	935	289	128	106	151	78	49	59	75
Public administration	298	35	16	22	44	42	42	46	51
Mining, quarrying, and oil and gas extraction	162	91	39	10	15	2	0	1	4
Agriculture, forestry, fishing and hunting	97	62	19	8	6	1	0	1	0
Utilities	65	27	8	9	11	2	2	2	4
Total	93,581	54,854	15,337	10,522	7,439	2,800	1,361	827	441

Source: Statistics Canada, Canadian Business Count

The top 10 industries with the highest proportion of businesses with employees in June 2018 are:

1. Professional, scientific and technical services (19.2%)
2. Health care and social assistance (11.4%)
3. Retail trade (10.5%)
4. Other services (except public administration) (9.4%)
5. Accommodation and food services (7.4%)
6. Construction (6.9%)
7. Real estate and rental and leasing (6%)
8. Finance and insurance (5.1%)
9. Administrative and support, waste management and remediation services (4.7%)
10. Wholesale trade (4.6%)

The table below represents the percentage change in the number of businesses by the different industries in the City of Toronto between June 2017 and June 2018. Analysis is conducted for industries that have employees only.

Table 3 reports the change in the number of firms with employees in the different industries between June 2017 and June 2018.

Table 3: Change in Number of Businesses by Industry, Toronto 2017-18

	Total, with employees June 2017	Total, with employees June 2018	Change in the No of Businesses
Agriculture, forestry, fishing and hunting	92	97	5
Mining, quarrying, and oil and gas extraction	164	162	-2
Utilities	68	65	-3
Construction	6,212	6,460	248
Manufacturing	3,657	3,602	-55
Wholesale trade	4,343	4,307	-36
Retail trade	9,890	9,847	-43
Transportation and warehousing	2,690	2,806	116
Information and cultural industries	2,597	2,903	306
Finance and insurance	4,723	4,742	19
Real estate and rental and leasing	5,588	5,633	45
Professional, scientific and technical services	17,389	17,964	575
Management of companies and enterprises	827	935	108
Administrative and support, waste management and remediation services	4,396	4,374	-22
Educational services	1,432	1,459	27
Health care and social assistance	10,584	10,680	96
Arts, entertainment and recreation	1,452	1,509	57
Accommodation and food services	6,925	6,903	-22
Other services (except public administration)	9,059	8,835	-224
Public administration	314	298	-16

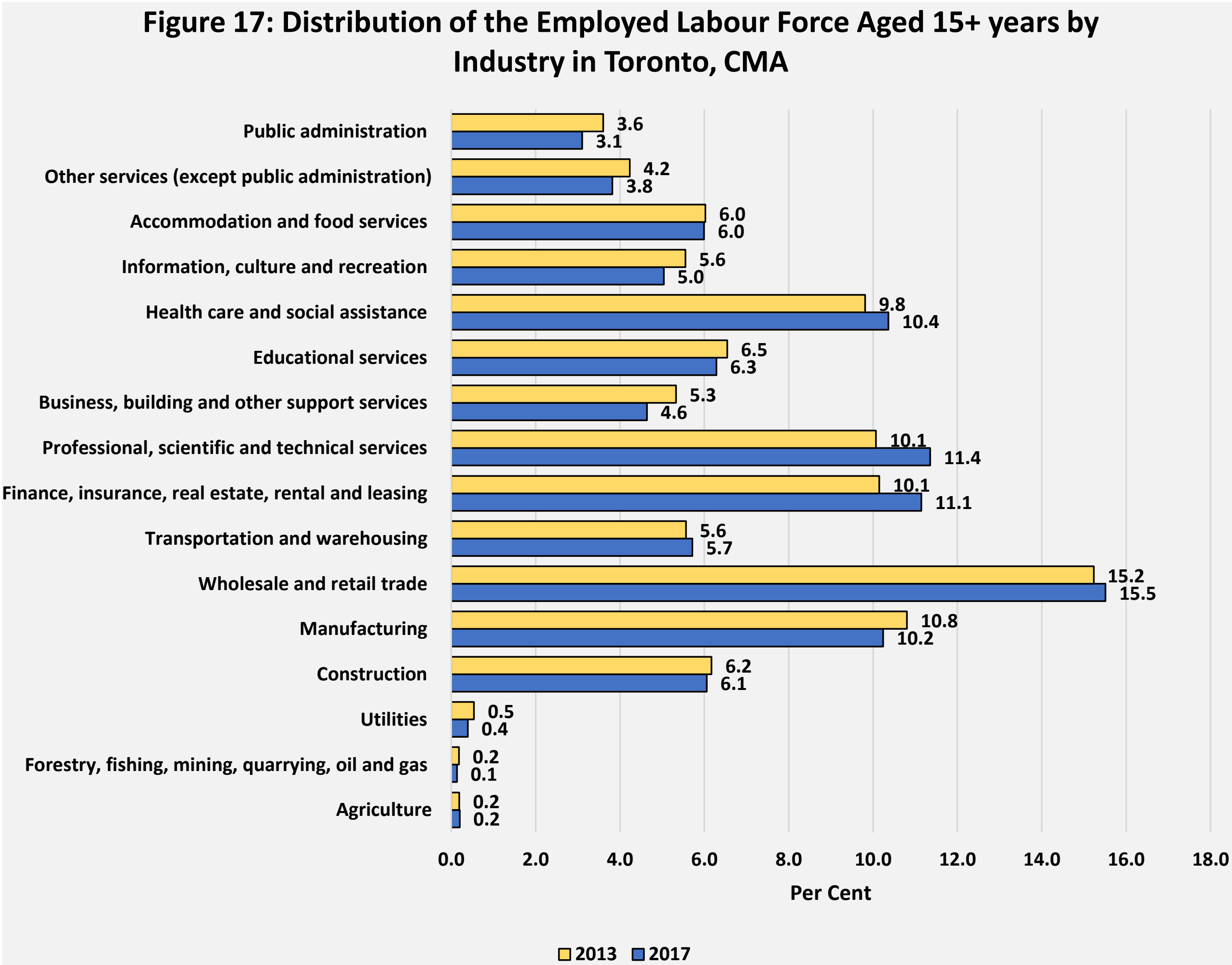
Source: Statistics Canada, Canadian Business Count

Based on table 3, the top ten industries that experienced the largest rise in the number of businesses between June 2017 and June 2018 were:

1. Professional, scientific and technical services
2. Information and cultural industries
3. Construction
4. Transportation and warehousing
5. Management of companies and enterprises
6. Health care and social assistance
7. Arts, entertainment and recreation
8. Real estate and rental and leasing
9. Educational services
10. Finance and insurance

Employment by Industry

Figure 17 below depicts the proportion of total employment by the different sectors in Toronto, CMA in the year 2017. To some extent this analysis could shed light on the importance of the industry in terms of job creation and whether or not that industry is booming or shrinking.



Source: Statistics Canada, Table: 14-10-0098-01 (formerly CANSIM 282-0131)

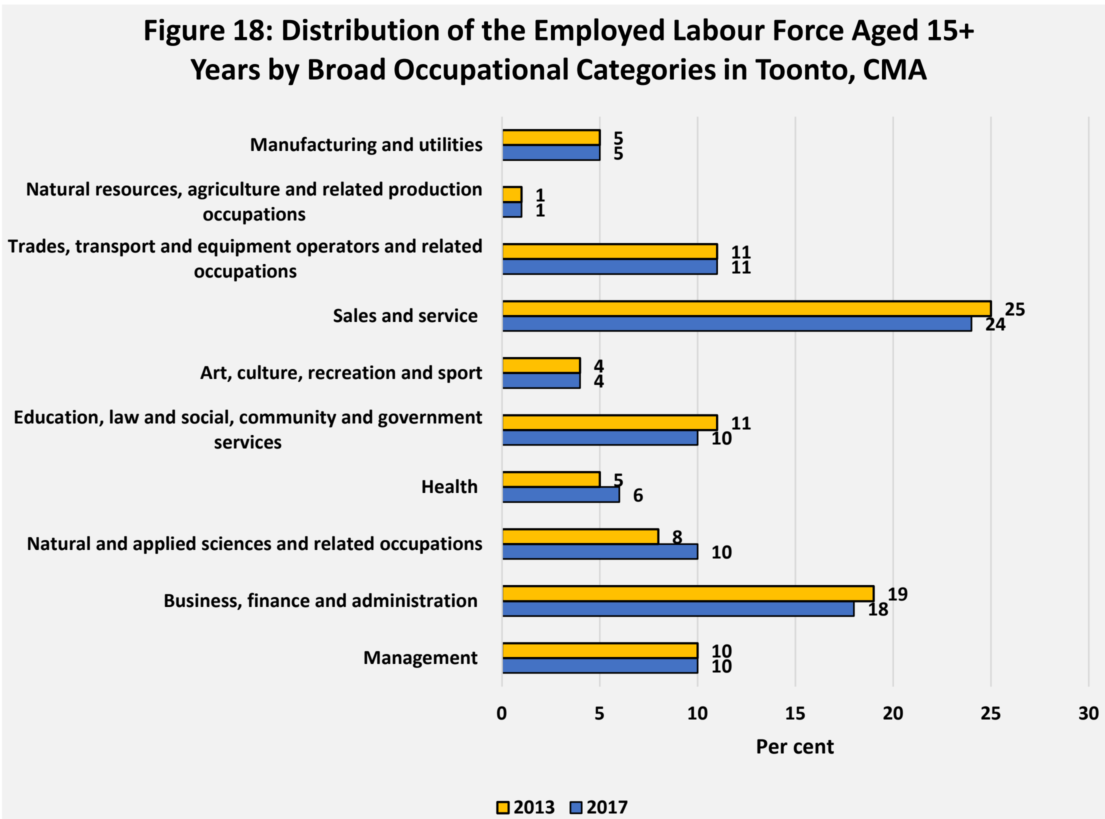
Toronto, CMA continues to be a service-oriented economy with 83% of total employment being generated in this sector versus 17% of employment in the goods-producing sector.

The top five industries that comprised of majority of employment in Toronto, CMA were:

1. Wholesale and retail trade (15.5%)
2. Professional, scientific and technical services (11.4%)
3. Finance, Insurance, real estate, rental and leasing (11.1%)
4. Health care and social assistance (10.4%)
5. Manufacturing (10.2%)

Employment by Level of Occupation

Figure 18 depicts the distribution of the employed labour force aged 15 years and over by broad occupational categories in Toronto, CMA. Over the last five years, share of employment by occupation has remained fairly stable. The dominant occupation among those employed in Toronto, CMA in 2017 is sales and service (24%), followed by business, finance and administration (18%) and trades, transport and equipment operators and related occupation (11%).

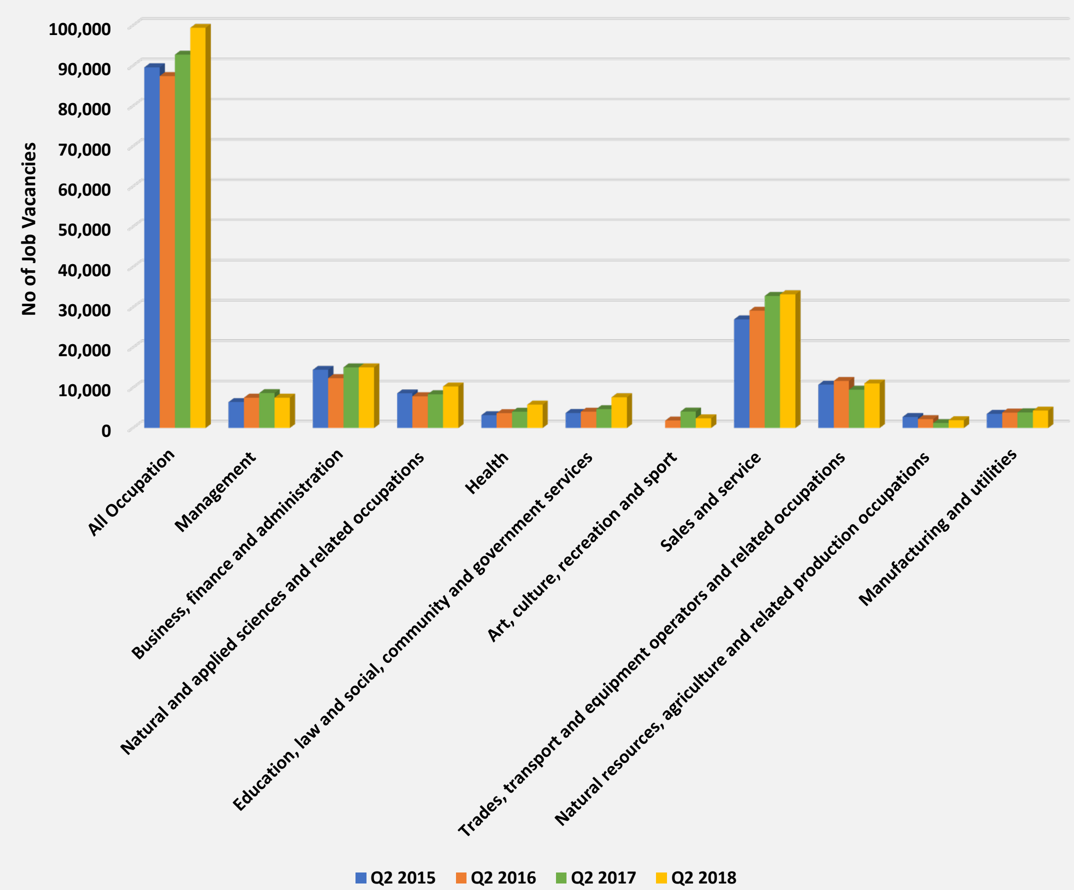


Source: Statistics Canada. Table 14-10-0314-01. Employment by census metropolitan areas and occupation, annual (x 1,000)

Job Vacancies by Occupation

Figure 19 represents the job vacancies in Toronto, CMA by various occupations over time using the quarterly Job Vacancy and Wage Survey (JVWS). There were 99,415 job vacancies in Toronto, CMA in the second quarter of 2018, up 6,645 (7%) from the second quarter of 2017. Compared to the second quarter of 2015, this was a 11% increase.

Figure 19: Job Vacancies by Occupations in Toronto, CMA



Source: Statistics Canada. Table 14-10-0356-01. Job vacancies and average offered hourly wage by occupation (broad occupational category), quarterly, unadjusted for seasonality

Majority of job vacancies in Ontario are concentrated in Toronto, CMA. In the second quarter of 2018, 48% of all job vacancies in Ontario were located in Toronto, CMA. The job vacancy rate[28] for the Toronto, CMA has not varied much over the past year and was 3.1% in the second quarter of 2018, one percentage point less compared to the same period in 2017.

In Toronto the largest number of job vacancies were in:

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

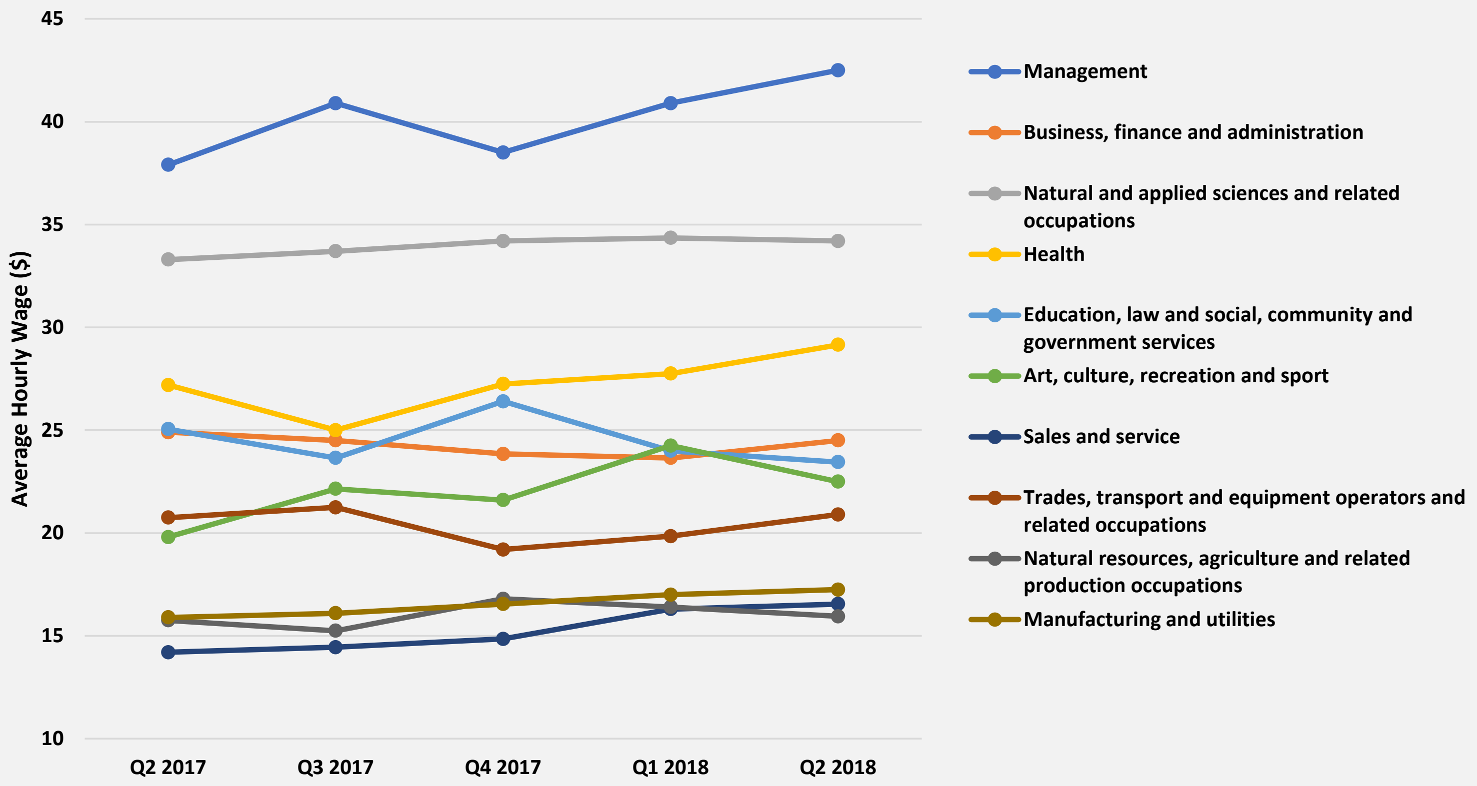
Occupations that saw persistent rise in job vacancies between second quarter of 2015 and 2018 were:

- Health
- Education, law and social, community and government services
- Sales and services
- Manufacturing and utilities.

Average Offered Hourly Wage by Occupation

Figure 20 below illustrates the quarterly trend in the offered average hourly wage rate for job vacancies by different occupations in Toronto, CMA between 2017 and 2018. The average offered hourly wage for all occupations in the second quarter of 2018 was $23.5, a 6.6% increase compared to the average hourly wage for all occupations in the second quarter of 2017.

Figure 20: Average Offered Hourly Wage by Occupation in Toronto, CMA



Source: Statistics Canada. Table 14-10-0356-01. Job vacancies and average offered hourly wage by occupation (broad occupational category), quarterly, unadjusted for seasonality.

However, during the same time period, larger changes were observed across broad occupational categories, particularly sales and services (16.5 %), art, culture, recreation and sport (13.6%) and management (12.1%). Occupations that experienced a decline in the average offered hourly wage during this time were education, law and social, community and government services (-6.4%) and business, finance and administration (-1.6%). Changes in the average hourly wage offered for job vacancies reflect multiple factors like wage growth and changes in the composition of job vacancies by occupation, by sector and between part-time and full-time positions.

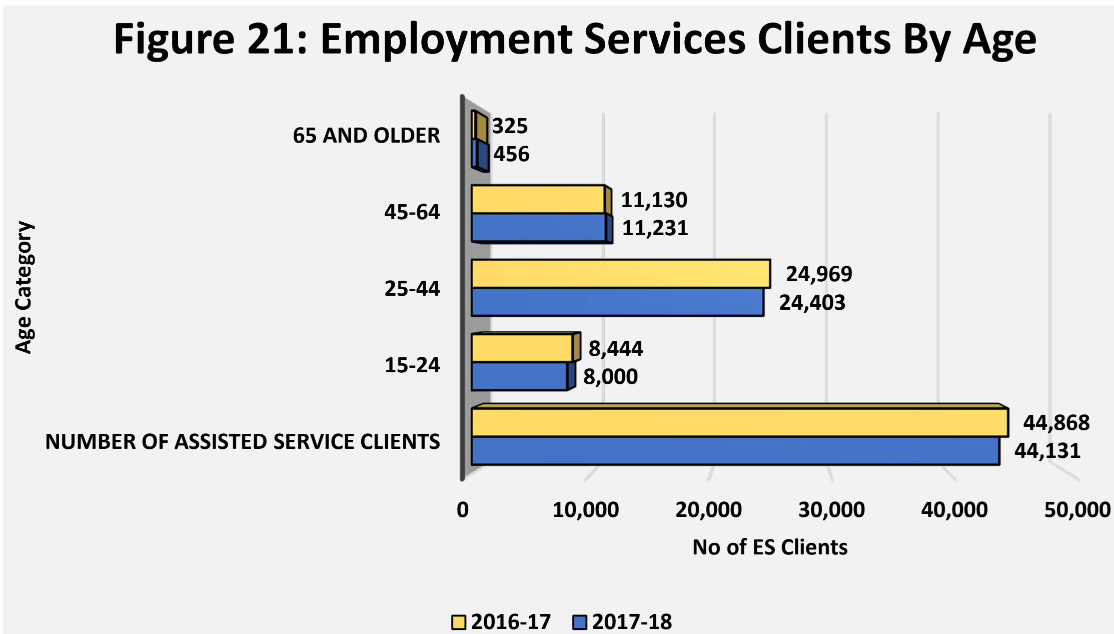
Analysis of Employment Ontario Program Related Data

This analysis is based on data compiled by the Ontario Ministry of Training, Colleges and Universities (MTCU) and provided to the Workforce Planning Boards and the Local Employment Planning Councils in Ontario. The data has 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 descriptions of the clients of these programs, their demographics, levels of education at in-take and possible outcomes at exit. A thorough analysis around these elements have been conducted for the year 2017-18 for each of the seven programs run in Toronto with comparisons to the previous period's statistics occasionally.

Employment Services

One of the key employment and training programs under Employment Ontario is Employment Services. It is a network of third-party service providers that deliver career counselling and support services to help people at the community level find sustainable employment. Individuals can find out about employment and training services by visiting an Employment Ontario Service provider.



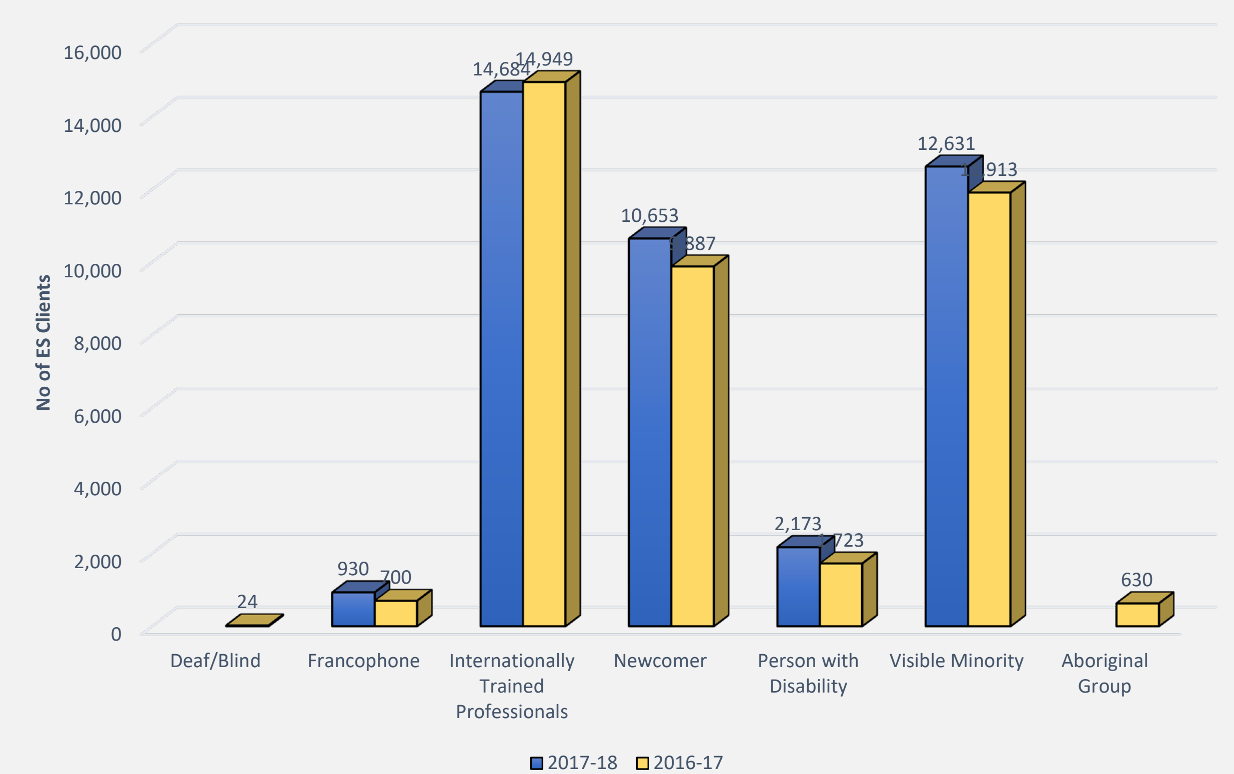
Source: Ministry of Training, Colleges and Universities, Employment Ontario

163,844 Torontonians accessed Employment Ontario's suite of services in 2017-18. This was a 20% reduction in the number of ES clients compared to the previous periods. The number of assisted service clients fell by 2% while the number of unassisted service clients fell by 5%. This reflects the current labour force trend of declining unemployment rate.

Figure 21 depicts the changes in the number of ES assisted service clients between 2016 and 2018 by age category. Data reveals that during this time, the usage of employment centres by youth (15-24 years) and prime working age (25-44 years) declined by 5% and 2% respectively. This is in keeping with Toronto LFS data that points to an easing of the youth unemployment rate over the past year. It could also be because youth tend to rely more on digital platforms as a resource to participate in the labour market or simply because of their lack of awareness about the employment service programs. The number of senior clients aged (65+ years) significantly increased by 40%.

The gender split for ES clients was virtually the same in 2017-18 compared to the previous period. Female clients continue to be the dominant users of these services.

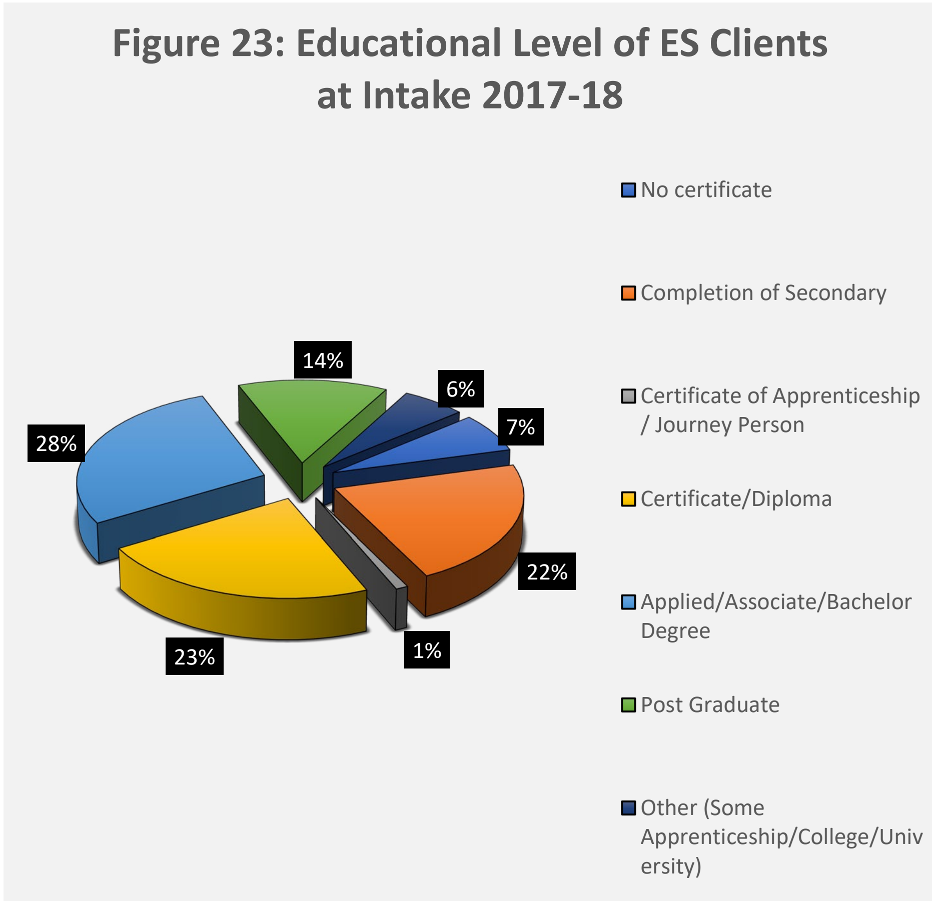
Figure 22: Employment Services Clients By Designated Group



Source: Ministry of Training, Colleges and Universities, Employment Ontario

Figure 22 reports clients by designated groups. While there was an overall decline in ES clients in 2017-18, analyzing the clients by designated group revealed a rise in the use of services by some designated groups such as Francophone (33%), Person with disability (26%), Newcomers (8%), and Visible Minorities (6%). These groups were actually using the services more in 2017-18 compared to the previous period. Usage by Internationally Trained Professionals declined by (2%) while nothing was recorded for Aboriginal groups and the Deaf/Blind category for 2017-18.

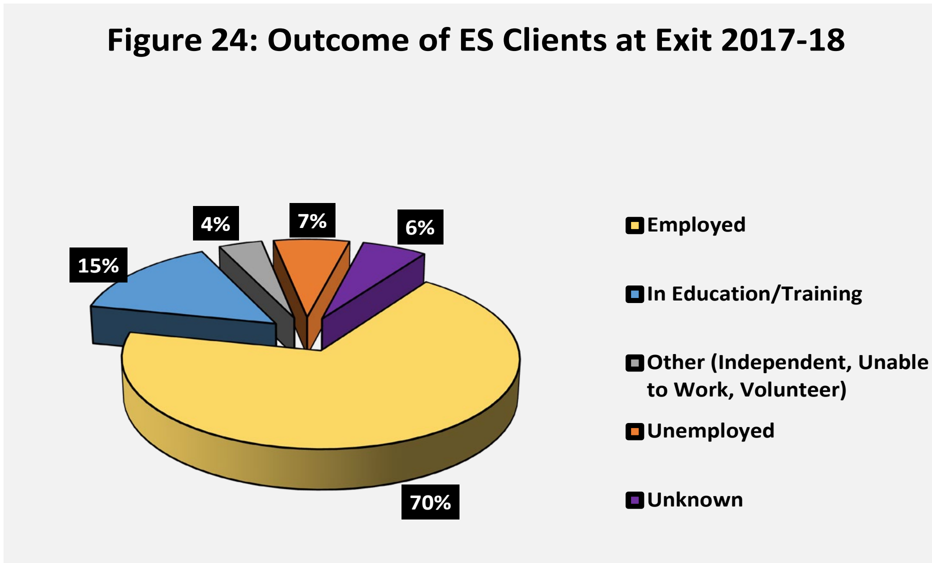
Figure 23 represents the educational level of ES clients at intake. The majority of the clients have applied/associated/bachelor degrees (28%); certificate/diplomas (23%); and secondary education (22%). A significant portion of clients having high levels of education is a reflection of clients in the designated categories like Internationally Trained Professionals and Newcomers.



Source: Ministry of Training, Colleges and Universities, Employment Ontario

Given the persistent employment challenges of those with low-educational attainment it would appear that job-seekers with high school or less may well be underrepresented in the use of employment services. This is also documented in the report by Toronto Workforce Innovation Group, “What Would It Take”[29], which described the challenges of finding work for the long-term unemployed in Toronto.

Figure 24 illustrates the employment services clients' outcome at exit in 2017-18. The numbers are similar to the previous years. 70% of the clients successfully secured employment after exiting the program while 13% got into education and training. A significant portion of the clients at exit however remained unemployed (7%).



Source: Ministry of Training, Colleges and Universities, Employment Ontario

The top 5 employed industry outcome at exit are:

1. Administrative and support and waste management/remediation services (704)
2. Health care and social assistance (387)
3. Accommodation and food services (353)
4. Professional, scientific and technical services (340)
5. Retail trade (335)

The top 5 employed occupation outcome at exit are:

1. Sales representatives and other customer and personal services occupations (476)
2. Service support and other service occupation (325)
3. Administrative and financial supervisors and administrative occupations (314)
4. Office support occupations (280)
5. Labourers in processing, manufacturing and utilities (230)

The number beside each industry and occupation represents the number of clients employed at exit. Data for occupation and industry have been aggregated at the 2-digit NOCS and NAICS level.

Apparently the top 5 employed occupations are also the same as the top 4 lay off occupations in the same order. This indicates that individuals with a work history in a particular occupation will look forward for and find work in the same occupation.

Apprenticeship

An apprenticeship is a pathway to a rewarding career in the trades, taking two to five years to complete training. The average age of registration for 2017-18 was 27 years old, of which 84% were male, 96% of all the clients were between the age of 15-44 years, and the majority of the clients had completed secondary education.

During 2017-18 the number of new registrations, the number of active apprentices, and the number of certificate of apprenticeships issued all declined by 1.5%, 0.5% and 12% respectively compared to the previous period. Given the recent policy focus on increasing the number of apprenticeships in Toronto, the numbers would suggest that this has yet to translate into concrete participation numbers. However, a significant rise of 42% was recorded with the number of registrants for modular training. Modular training is on-the-job training where the trainee is accredited at each step. Training is provided in response to skills needed and health and safety concerns, mainly in the mining and forestry sectors, and in crane-operation and commercial vehicle maintenance.

Table 4 below identifies a list of top 10 new registrations in trades. It appears that while the list remained the same for the first four types of trade, there have been some new additions in the list for the year 2017-18 like Construction Millwright, Truck and Coach Technician, Architectural Glass and Metal Technician and Ironworker - Structural and Ornamental.

Table 4: List of Top 10 New Registrations in Trade

2017-18	2016-17
Electrician - Construction and Maintenance	Electrician - Construction and Maintenance
Automotive Service Technician	Automotive Service Technician
Plumber	Plumber
Hairstylist	Hairstylist
Sheet Metal Worker	Child Development Practitioner
Construction Millwright	Sheet Metal Worker
Child Development Practitioner	Construction Millwright
Truck and Coach Technician	Cook
Architectural Glass and Metal Technician	Powerline Technician
Ironworker - Structural and Ornamental	Construction Craft Worker

Source: Ministry of Training, Colleges and Universities, Employment Ontario

Second Career

Second Career provides laid-off workers with skills training to help them find jobs high in demand in Ontario. It is a cost-sharing grant provided on the basis of need and can provide financial assistance for tuition, books, transportation and a basic living allowance.

The number of clients under Second Career for the year 2017-18 was 1055, a 32% reduction compared to the previous period. 97% of these clients fall under the age category of 25-64 years of age.

Table 5: Top 10 Skills Training Program in Toronto

2017-18	2016-17
Accounting and Related Clerks	Accounting and Related Clerks
Computer Network Technicians	Social and Community Service Workers
Early Childhood Educators and Assistants	Home Support Workers, Housekeepers and Related Occupations
Social and Community Service Workers	Computer Network Technicians
Transport Truck Drivers	Early Childhood Educators and Assistants
Medical Administrative Assistants	Medical Administrative Assistants
Home Support Workers, Housekeepers and Related Occupations	Transport Truck Drivers
Paralegal and Related Occupations	Paralegal and Related Occupations
Massage Therapists	Estheticians, Electrologists and Related Occupations
Accounting Technicians and Bookkeepers	Massage Therapists
Estheticians, Electrologists and Related Occupations	Administrative Officers

Source: Ministry of Training, Colleges and Universities, Employment Ontario

Table 5 lists the top 10 second career training options in Toronto. Accounting and related clerks topped the list for 2017-18 and the previous period. Some new occupations made its way into the list of 2017-18 while some skills training program exited the list.

Canada Ontario Job Grant Program

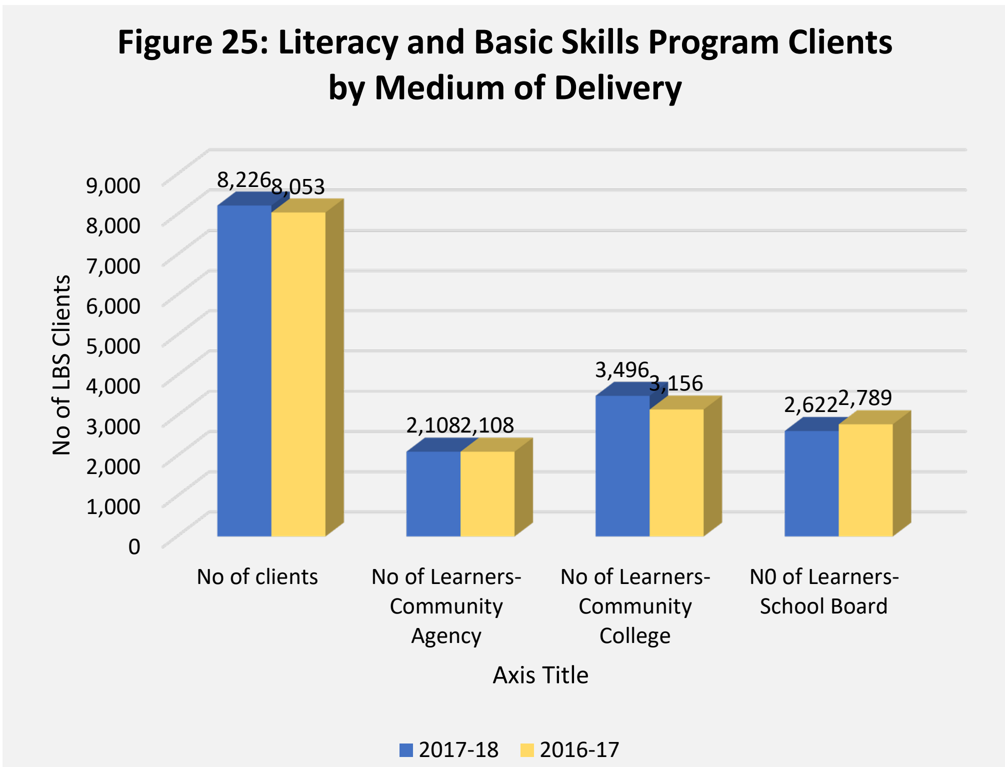
The Canada-Ontario Job Grant (COJG) provides an opportunity for employers to invest in their workforce. The Job Grant supports employers financially to purchase training for their employees. It is available to small, medium and large businesses with a plan to deliver short-term training to existing and new employees.

598 employers received the COJG funding for 2017-18, this was 22% less than the number of employers in the previous period. Of those who had received funding, 81.6% of the employers had a staff count of less than 150, 9% of the businesses had employees between 151-500 and 9% had employees of 500+.

At exit, 93% of the trainees showed increase in productivity and 97% of these trainings meet workforce needs. A majority of the trainees had completed applied/associate/bachelor's degrees, and 88% of the clients fell under the age category of 25-64 years, 11% were youth in the age category 15-24 years and only 1% were 64+ years.

Literacy and Basic Skills Program

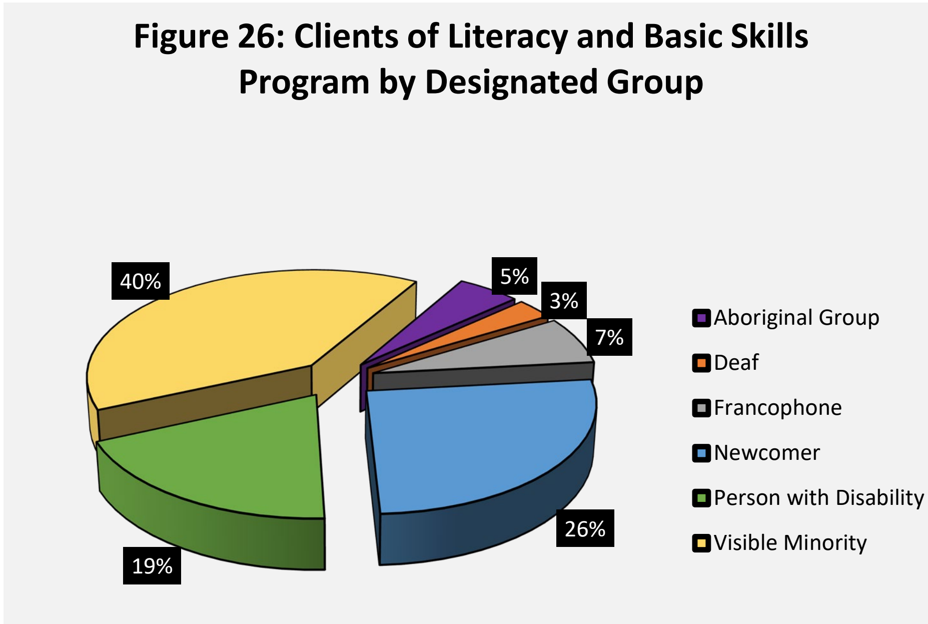
This program[30] mainly serves adult learners whose skills fall below Grade 12 of the Ontario Curriculum to help improve their literacy and numeracy skills to achieve employment, post-secondary, apprenticeship, secondary school credit and independence. The program is delivered through colleges, school boards and community-based organizations.



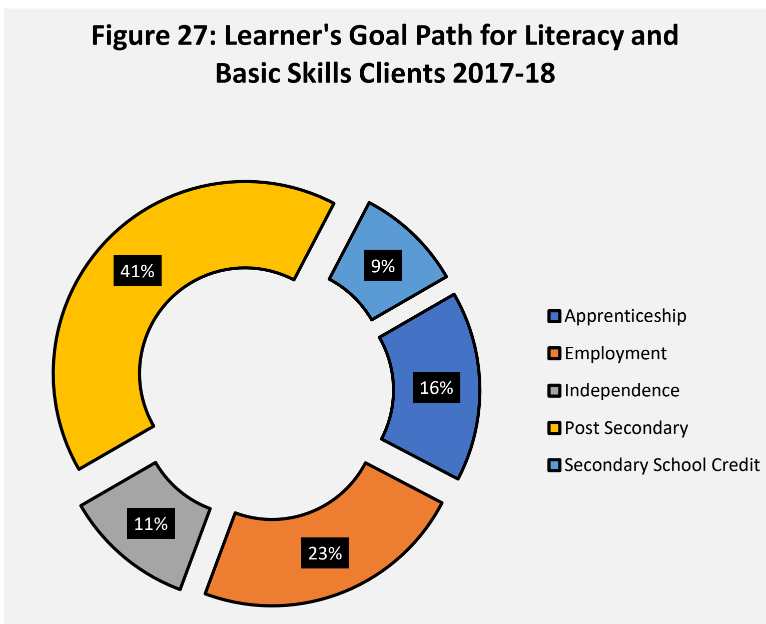
Source: Ministry of Training, Colleges and Universities, Employment Ontario

The number of clients for Literacy and Basic Skills program comprises of in-person and e-learners new or carried over from previous years. In 2017-18 there was a 2% increase in the number of clients compared to the previous period. Community agencies delivered to the same number of clients like the previous period. However, compared to 2016-17, community colleges served 11% more clients whereas school boards served 5% less in 2017-18. Majority of these clients were female in the prime working age category (25-44 years).

Figure 26 reports statistics for the designated groups of clients in the literacy and basic skills program. This data relies on self-reported information and therefore could be understated. The top three designated groups were Visible minority (40%); Newcomer (26%) and Person with disability (19%).



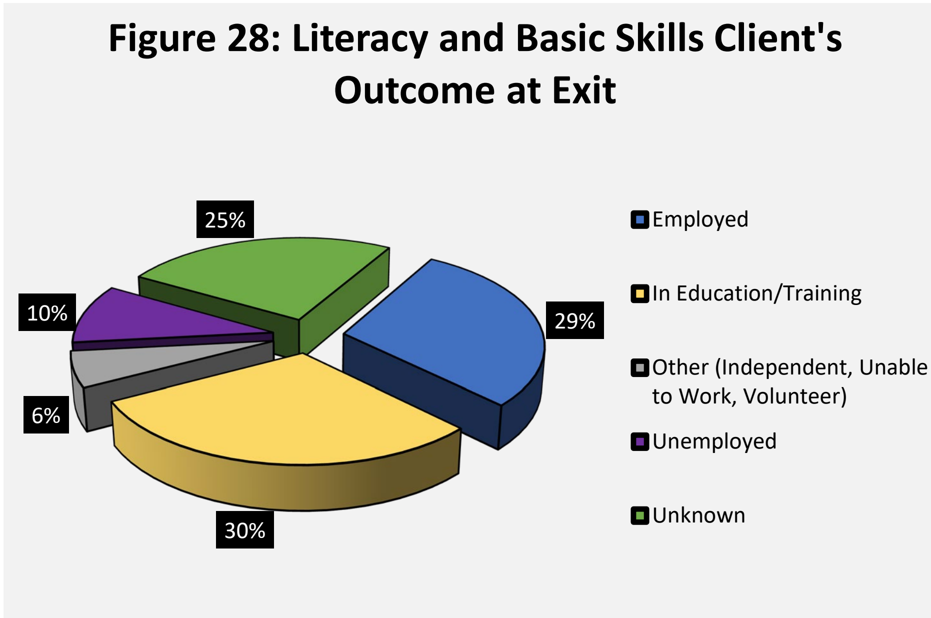
Source: Ministry of Training, Colleges and Universities, Employment Ontario



Source: Ministry of Training, Colleges and Universities, Employment Ontario

Figure 27 presents data for the learner's goal path for the literacy and basic skills program clients. The goal[31] is what the learner wants to achieve once leaving the LBS Program. It is the next step to which the learner transitions after completing the program. The goal path[32] 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 (40%); followed by employment (23%) and apprenticeship (16%).

A large proportion (30%) of LBS clients at exit got into in education/training and 29% successfully secured employment. However, 25% of the clients never reported the outcome at exit.



Source: Ministry of Training, Colleges and Universities, Employment Ontario

Youth Job Connection Grant

The Youth Job Connection program serves youth aged 15-29 years who experience multiple and/or complex barriers to employment by providing intensive supports beyond traditional job search and placement opportunities.

In 2017-18, this program served 3,240 clients a reduction of 7.5% compared to the previous period. Share of grant by gender was fair. While 60% of the youth served had completed secondary education/certificate of apprenticeship /certificate/diploma, 16.5% of the clients had no certificates (less than grade 12 or grade 9). Visible minorities and newcomers were the top two designated groups of clients for the year 2017-18.

Ontario Employment Services

This program provides financial support to organizations that deliver employment services to unemployed people with disabilities[33]. This program served 1,931 clients in 2017-18, a reduction of 5% compared to the previous period. The majority of clients were males in their prime working age (24-44 years), had completed secondary education or had a diploma.

Action Plan

The Action Plan of the Toronto Workforce Innovation Group 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.

Labour market participation in the City of Toronto is a challenge that will see a continued trend over the next two decades. As the older workforce remains in the labour force for extended periods of time, fewer youth aged 15 to 24 are entering it[34]. We can attribute the lower participation rates to more young people pursuing further education[35]; however, this demographic is discouraged by a lack of suitable work available, a common belief shared amongst their peers[36]. The cost of Ontario's skills gap issue is a constant dialogue discussed by employers, governments, and educators throughout the province. Toronto is no exception. Employers expect youth entering the workforce to come equipped with a diverse skill set than previous generations due to the shifts in Ontario's economy. To address this ongoing challenge, it is recommended that the education sector understands the skills necessary to thrive in the age of technological advancements and provide students with a skills-based approach to the future of work[37].

In some sectors, economic insecurity affects a majority of part-time and full-time workers. Faculty workers in Canadian universities are experiencing precarious employment at an all-time high[38], while older workers are beginning to participate in the gig economy and using digital platforms to find freelance work. Gig work has become its own trend, as the rise in temporary work and income insecurity grew over the last 13 years. Online platform-mediated work has the potential to transform the future of Canada's employment landscape[39]. With 73% of millennials anticipating gig jobs as a way of surviving our economic climate, a major concern is the lack of income volatility, benefits and job security, coupled with an increasing number of workers experiencing mental health challenges. The City of Toronto is committed to promoting mentally healthy workplaces and psychological well-being. In our work with CAMH as well as with frontline TESS staff, actions are committed to preventative harm to employees' psychological health through the delivery of programs, services and policies.

Racialized groups in Ontario are concentrated in lower-wage jobs and continue to face higher unemployment rates, with racialized women earning 58 cents for every dollar a non-racialized man earns[40]. With low-spending on labour market programs and the high costs of housing in the city centre, intergenerational social mobility will affect many low-earning Canadians, as it could take up to four generations of families to become middle income earners[41]. The province of Ontario is no stranger to immigration, but high-barriers to entry in the labour market leave skilled immigrants without effective ways of integrating into our economy[42]. Settlement services focused on assisting in the employability of skilled immigrants

and effectiveness of support by government and non-governmental agencies is one way in which TWIG works with community partners to address these interconnected challenges.

Thus far, all issues mentioned above lend itself to the future of work in Canada. With a fourth industrial revolution on the rise, the labour market as we know it is poised to disrupt completely by means of automation and digitalization by 2030[43]. In some way or form, all occupations have components that are technically automatable, with a number of jobs being lost due to disruption and majority of them being created because of it. The supply of jobs and demand of skills will be severely altered as the landscape shifts as a result of automation. Those who are able to change careers swiftly and build a harder to automate skill set such as emotional, social and high-cognitive skills will fare better in the workforce than those working physical labour jobs.

There will always be concern on how to best serve clients with mental health issues, those facing greater opposition to employment, racial barriers and non-inclusive employment practices, and caring for frontline staff. Access to substantive, local labour market information will allow for more innovation to shape the way we proceed to take action in addressing current and future labour market trends and issues.

Where We Were 2018-2019

CAMH Education and Information Fair

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. The event allowed CAMH clients seeking work to connect with potential employers in a supportive environment. The job fair was tailored to opportunities in seasonal hiring and engaged more employers than in previous years. The key partner was CAMH. This is a long-term project as we have been working with CAMH for over 4 years and expect to continue to do so as the issues, goals and initiative are on-going as mental health awareness increases in our society.

Retail Trade Sector Study

The retail sector of the city is faced by an exciting but challenging transformation; marked by the rise of online shopping, omnichannel retailing, and emergent competition as technology drives constant change in the way Torontonian's shop. This report describes and documents the composition of local retailers in Toronto by the different sub-sectors in retail trade, distribution of the retailers by size (number of employees working in the firm), changes in the number of retail business units by sub-sectors of retail trade. Census 2016 data and labour force survey is used to report and analyze retail trade workforce demographics and income statistics by occupation of those employed in the sector. A locational survey of retailers is conducted at one of the biggest shopping malls in Canada, Yorkdale Shopping Centre. The report also provides an overview of the fastest growing jobs in retail trade and other career transition scope according based on secondary research. The key partners were Toronto Employment and Social Services and Oxford Properties Management, Yorkdale Shopping Centre.

Builders and Dreamers

Builders and Dreamers 2019 is a half day conference for youth age 19 – 29 years old who have an interest in starting their own small business enterprises. Youth attended workshops on banking and financial literacy, developing business plans, attracting funders while also acquiring new entrepreneurial skills to help them in all stages of entrepreneurship journey. With the addition of workshops, businesses, organizations, programs and funders were invited to participate as vendors for the fair to showcase their opportunities and connect with youth attendees. The objective was to engage 60 newcomer youth in priority neighbourhoods across the City of Toronto on the best practices for entrepreneurship while offering resources for each step of launching their own small business enterprises.

Workforce Development Forum

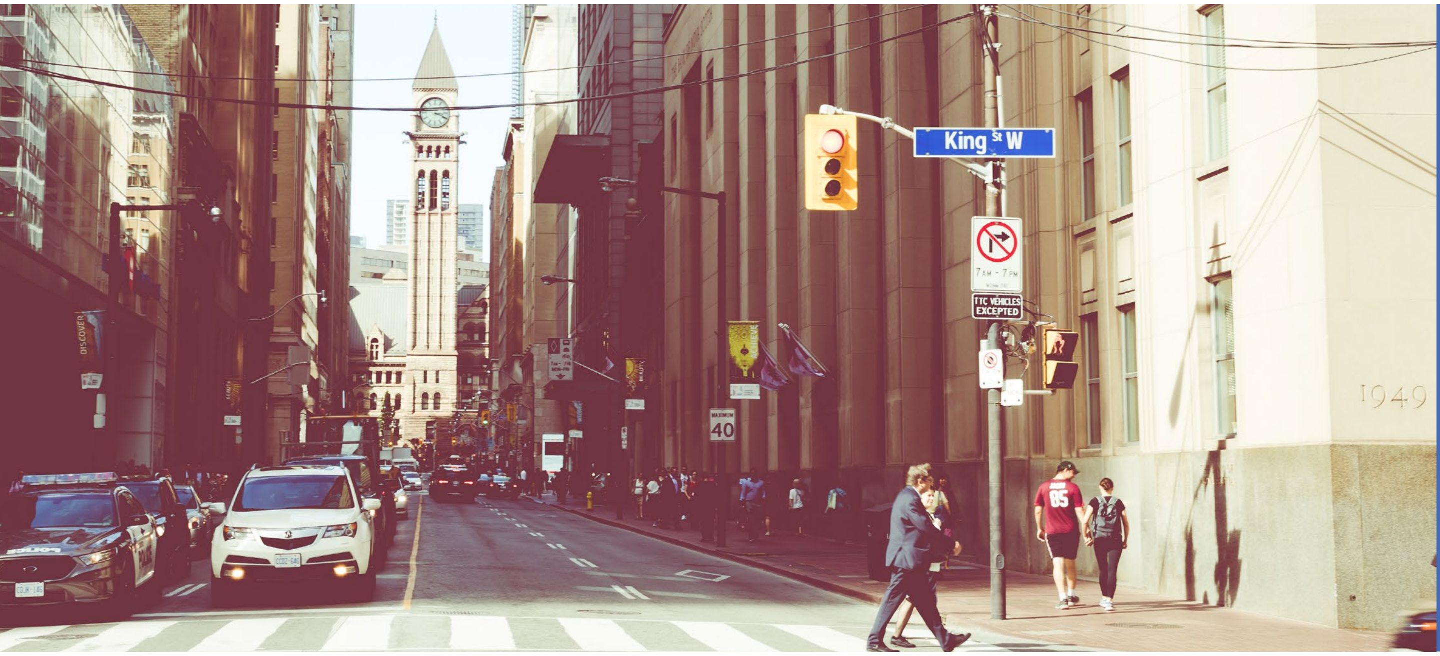
This event shed light upon the different job seeking population in Toronto. A panel of two subject matter experts were formed that focused on two separate reports on distinct job seeking population in Toronto like racialized groups, the invisible workforce and job seekers with mental health issues. The objective was to ensure that service providers have a better understanding of these population so that it is easier for them to match services to people's needs.

Construction and Building Maintenance Program Presentations

Homeless and at-risk youth in the City of Toronto are becoming even more displaced by systemic barriers to employment, the cycle of poverty and a lack of secure housing. We believe a program such as Eva's Construction and Building Maintenance (CBM) Training Program gives back to these communities by training and upskilling youth to see not only the importance of the trades but also how they can make an impact in the communities in which they live. TWIG presented this innovative opportunity CBM Training Program to five Employment Ontario service providers across the City of Toronto to bring awareness, increase registration and diversify the trades/construction sector thus so that youth build tangible skills, are independent, and acquire sustainable full-time employment.

Opportune Move for Newcomers Immigrant

Newcomer immigrants can be a critical component of Ontario's economic strength. To realize the full economic benefit the province must support newcomer immigrants gain meaningful employment. Newcomer immigrants are often driven to settle in the Greater Toronto Area due to the availability of a wealth of services for the newcomers in these communities. However, as housing prices are soaring in the GTA, job opportunities are weak leading to unemployment or underemployment more so for newcomer immigrants small-town or rural Ontario could be an alternate area of greater and sustainable employment opportunities for this category of the population. This study that will showcases promising practices and strategies that can be used to attract newcomers and immigrants currently living within the GTA to relocate elsewhere in Ontario. The study aims to bring great awareness of the community services, employment, housing and education related services demanded by the those willing to relocate outside the GTA but within Ontario. The key partners were Toronto Employment and Social Services and Toronto Region Immigrant Employment Council.



Stakeholder Engagement and Consultations

Toronto Workforce Innovation Group recognizes the significance of community stakeholders, local government and employers in identifying workforce issues. This year TWIG facilitated several consultation processes with these parties discussing the need to well define the overall workforce development ecosystem, identifying gaps in that system as well as collaboration with all sectors.

During these consultations it was reiterated to review our ecosystem, the stakeholders, and identify interrelated elements towards achieving related goals and shared values. Our labour market is comprised of a number of well-intentioned, feasible efforts but many of these initiatives are working in isolation. Community stakeholders suggested that we focus on the contributors to the changing nature of work, the current nature of the gig economy, precarity, the aging workforce, and disrupting technology. How do we prepare this workforce to this change in the nature of work? As precarity is a risk, it is important to find out how this risk can be depreciated. Research should focus on the mechanisms of how-to de-risk for the individuals involved, as employers are already de-risking in their own businesses.

Due to the changing nature of work, there will always be a constant need of skills upgrading among the job seekers. However, there were concerns whether the employers have the incentives or the capability to support that. It was identified that the government, educational institutions and community organizations and private sector have a role to play in supporting the long-term upskilling of employees. For example, Dixon Hall brings in CIBC to educate staff on the pathways available to job seekers in the financial sector. Employment service providers and employers during the consultation process mentioned that alignment to the needs of both parties is important and can be done by identifying the unique elements community agencies can bring to satisfy employer needs effectively. They also exaggerated that youth and mature workers should not be lumped into one homogenous entity by policy makers as the employment needs of each of this age category are very different. Governments, educational institutions, employers and job seekers themselves all play an important role in the transition from school to work.

It appeared that the success of most workforce development or employment support programs models depends on the scale. Service providers claimed that bigger programs are riskier. They believe what Toronto's workforce development strategy also requires is looking at the elements of success in each program. There is no benefit to 'creating another program', or replicating an existing program. It's more looking at core elements of an existing program, the keys to success, and making sure they're woven into the bigger system. Stakeholders identified that it is important to come together to explore common visions, and draw on collective strength.

A key sector that plays a significant role in the city's economic development and social progress in the city's neighbourhood is the retail trade sector. This year TWIG conducted a sector study on retail trade to gain a better understanding of issues facing Toronto's retail sector. One quantitative component of this research initiative involved conducting group administered surveys with retailers of various retail sub-sectors in Yorkdale Shopping Centre at a full day structured forum/participatory session. Toronto Employment and Social Services (TESS) in partnership with Oxford Properties, Yorkdale supported this research project by bringing together 20 retail employers from Yorkdale mall who participated in the survey allowing Toronto Workforce Innovation Group (TWIG) to collect the required information for the study.

Although the intent was to collect in-depth information that reflects the varied contexts and perspectives offered by the different employers, given that retail trade sector is so diversified the survey findings of 20 retailers for one retail location would only give a snapshot of the employers' view located in the Yorkdale Shopping Centre[44]. The surveys were conducted with the staff member(s) in the mall that had the primary responsibility for hiring new employees. Topics addressed included: company background, recruitment practices, training requirements, recruitment and retention challenges, essential skills for in-store retail positions, working conditions, wage, commission, and benefit structure, and the typical career path in retail.

Employers participating in the survey were asked what were the most frequently used method to fill the company vacancies. The top three most widely used recruitment methods identified by the respondents were job fairs, employment search engines (e.g. Indeed, LinkedIn etc.), and walk-ins. Employers mentioned that employment search engines and job-fairs are time efficient and allow them to screen out job-candidates from a larger platform of job-seekers. Walk-ins also allow them to immediately get a good gage of how candidates present themselves and interact with people.

Good communications skills, outstanding customer service, and time-management were found to be the most desired set of skills for all types of positions in a retail store. Most participants reported multiple challenges encountered while recruiting a new worker[45]. 62% of the survey participants said their biggest recruitment challenge was the ability to identify the right candidates given the large pool of candidates. Lack of specific product knowledge, budget constraint to volume recruitment, inflexible work hours of potential candidates, lack of required technical/technological skills, difficulty in competing for talent at the senior management level were also identified as critical recruitment challenges in the sector.

Retail employers identified the following as a challenge to retain employees: inflexible workers (for example not willing to accept irregular hours, weekends/work during public holidays), inflexible workers (students going back to school) and compensation issues (minimum wages and no/poor benefit packages posing a challenge to attract highly qualified individuals).

TWIG also conducted an online survey as a part of a study to check the extent to which newcomer immigrants were willing to relocate for the purpose of employment outside the GTA but within Ontario. A total of 52 newcomer immigrants participated. 56 % of the respondents said if there was an opportunity to work in an occupation related to their education and training with higher wages and added job security then they were willing to leave the GTA community and relocate in other parts of Ontario. 72% of the respondents identified access to good schools, affordable housing and easy access to transit and transportation as the key community/regional features they would consider for relocating in a community.

Endnotes

1 Toronto Economic Bulletin, Open Data

2 The Economist. Web: http://www.eiu.com/topic/liveability

3 The Toronto Star. Web: https://www.thestar.com/news/gta/2017/10/25/a-majority-of-torontonians-now-identify-themselves-as-visible-minorities-census-shows.html

4 City of Toronto. Web: https://www.toronto.ca/city-government/data-research-maps/toronto-economy-labour-force-demographics/

5 City of Toronto. Toronto Employment Survey 2017. Web: https://www.toronto.ca/wp-content/uploads/2018/03/95b8-Toronto-Employment-Survey-2017-Bulletin.pdf

6 The Globe and Mail. Web: https://www.theglobeandmail.com/business/article-toronto-ranked-highest-in-tech-jobs-growth-in-canada-us/

7 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.

8 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

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

10 Ontario 360. Web: http://on360.ca/wp-content/uploads/2018/04/ON360-Northern-Development.pdf

11 Ontario Ministry of Finance, 2016 Census Highlights. Web: https://www.fin.gov.on.ca/en/economy/demographics/census/cenhi16-8.html.

12 City of Toronto. 2016 Census: Education, Labour, Journey to work, Language of work, Mobility and migration. Web: https://www.toronto.ca/wp-content/uploads/2017/12/94ce-2016-Census-Backgrounder-Education-Labour-Journey-to-work-Language-Mobility-Migration.pdf

13 The unemployment rate is calculated by dividing the total number of unemployed people by the number of people in the labour force. Statistics Canada defines unemployed persons as those who were available for work during the survey reference week (when labour force statistics are collected), but: were without work and had looked for work in the past four weeks; were on temporary layoff due to business conditions and expected to return to work; were waiting for a new job to begin within four weeks.

14 The Canadian Encyclopedia. Web: https://www.thecanadianencyclopedia.ca/en/article/unemployment

15 City of Toronto. Web: https://www.toronto.ca/city-government/data-research-maps/toronto-economy-labour-force-demographics/

16 https://www150.statcan.gc.ca/n1/pub/11-630-x/11-630-x2017004-eng.htm

17 Canadian Centre for Policy Alternative, 2013. Web: https://uwaterloo.ca/canadian-index-wellbeing/sites/ca.canadian-index-wellbeing/files/uploads/files/the_young_and_the_jobless-youth_unemployment_in_ontario.pdf

18 The employment rate refers to the number of persons who did any paid work at a job or business during the survey reference week, either as an employee or under

self-employment expressed as a percentage of the total population 15 years of age and over.

19 City of Toronto. Web: https://www.toronto.ca/city-government/data-research-maps/toronto-economy-labour-force-demographics/

20 City of Toronto. Toronto Employment Survey 2017. Web: https://www.toronto.ca/wp-content/uploads/2018/03/95b8-Toronto-Employment-Survey-2017-Bulletin.pdf

21 Government of Ontario. Final Report and Recommendations of the Gender Wage Gap Strategy Steering Committee. Web: https://files.ontario.ca/7198_mol_gwg_finalreport_eng_wa_08f_v2_1.pdf

22 Full-time job is one in which a person usually works 30 hours or more per week in the main job

23 Statistics Canada. The impact of ageing on labour market participation rate. 2017. Web: https://www150.statcan.gc.ca/n1/pub/75-006-x/2017001/article/14826-eng.htm

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25 Statistics Canada. The impact of ageing on labour market participation rate. 2017. Web: https://www150.statcan.gc.ca/n1/pub/75-006-x/2017001/article/14826-eng.htm

26 Statistics Canada. Canadian Business Counts. June 2018. Web: https://www150.statcan.gc.ca/n1/daily-quotidien/180821/dq180821c-eng.htm

27 Analysis presented in the table has been made using businesses that are classified.

28 The job vacancy rate represents the number of job vacancies expressed as a percentage of labour demand; that is, the sum of all occupied and vacant jobs.

29 Toronto Workforce Innovation Group. What Would it Take? A Longitudinal Study of the Unemployed in Toronto. 2017. Web: http://workforceinnovation.ca/wp-content/uploads/2017/11/What-Would-It- Take_V2.pdf.

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

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32 ibid

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

34 Statistics Canada. The impact of ageing on labour market participation rate. 2017. Web: https://www150.statcan.gc.ca/n1/pub/75-006-x/2017001/article/14826-eng.htm.

35 Statistics Canada. Table 282-0218. Labour Force Survey Estimates (LFS), Reason for not Looking for Work, by Sex and Age Group, Unadjusted for Seasonality.

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39 https://www.glomhi.org/uploads/7/4/4/8/74483301/workers_in_the_global_gig_

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41 OECD Library. 2018. Web: https://read.oecd-ilibrary.org/social-issues-migration-health/broken-elevator-how-to-promote-social-mobility_9789264301085-en

42 Kaushik, V., & Drolet, J. (2018). Settlement and Integration Needs of Skilled Immigrants in Canada. Social Sciences, 7(5), 76.

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44 This survey is locational and gives a snapshot of retailers in general but does not claim to be a representative of all retailers in general.

45 Percentages would not add to 100%.

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