EQUITABLE RECOVERY AND NEW FRONTIERS:

Understanding Demand and Supply in Retail, Manufacturing, Construction, and Hospitality

Research by

The Information and Communications Technology Council

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Preface

The Information and Communications Technology Council (ICTC) is a not-for-profit national centre of expertise for strengthening Canada's digital advantage in a global economy. Through trusted research, practical policy advice, and creative capacity-building programs, ICTC fosters globally competitive Canadian industries enabled by innovative and diverse digital talent. In partnership with an expansive network of industry leaders, academic partners, and policymakers from across Canada, ICTC has empowered a robust and inclusive digital economy for over 30 years.

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The opinions and interpretations in this publication are those of the authors and do not necessarily reflect those of the Government of Ontario.

Designed by Nick Routley.

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Mechanical Contractors Association of Canada (MCAC)

Restaurants Canada

Skills Ontario

RESCON (The Residential Construction Council of Ontario)

Contents

Glossary of Terms

Affected Sectors (for purposes of this study): manufacturing, construction, retail, and accommodation and food services industries (hereafter referred to interchangeably as the hospitality sector).

Affected Populations (for purposes of this study): youth, women, newcomers to Canada, racialized populations, and other underrepresented groups.

Women: individuals who self-identify as a woman.

Youth: individuals aged 15 to 24 as of March 1, 2022, unless otherwise specified.

Newcomers to Canada: a landed immigrant or permanent resident who has been in Canada for five years or less as of March 1, 2022. International students and temporary foreign workers are included in this study's definition.

Underrepresented groups: individuals who self-identify with at least one of the following groups:

> **Indigenous peoples:** Refers to the original people of any land around the world. Within the context of this report, the term 'Indigenous Peoples' refers to individuals who are First Nations, Inuit and Métis.

> **Racialized persons:** Often used to stand in for "visible minorities," this more fluid term acknowledges that race is a social construction that can change over time and place. It can be applied to people who have racial meanings attributed to them as a group that negatively impact their social, political, and economic life.

> **Persons with disability:** individuals who self-identify as a person with a disability, including those requiring specialized mental health support or with a disability as defined in Section 10 (1) of the Ontario Human Rights Code.

Precarious work: employment that does not offer adequate income, security, stability, and normal employment benefits.[1]

Note on intersectionality: In conducting research with equity-seeking groups, ICTC acknowledges the differences among and within such groups while reflecting on convergences and experiences that are felt collectively. Intersectionality is the concept that individuals navigate through multiple forms of social and structural barriers simultaneously.[2] ICTC recognizes that groups of people are not homogenous, and individuals have multiple, diverse intersecting factors that shape their perspectives and impact their employment and career experiences. The experiences of individuals are complex and not indicative of or related to one single social identity. This study takes an intersectional approach to its methodology and analysis of research findings.

1 *"Precarious Work," International Labour Organization, 2010, https://www.ilo.org/wcmsp5/groups/public/@ed_dialogue/@actrav/documents/meetingdocument/wcms_161381.pdf*

2 *Chia Longman and Katrien De Graeve, "From Happy to Critical Diversity: Intersectionality as a Paradigm for Gender and Diversity Studies," 2014, https://doi.org/10.11116/jdivegendstud.1.1.0033*

Acronyms

APQP: Advanced Product Quality Planning

AFS: Accommodation and Food Services

BIPOC: Black, Indigenous, and People of Colour

B2B: Business-to-Business

B2C: Business-to-Consumer

CERB: Canada Emergency Response Benefit

CET: Certified Engineering Technologist

CMA: Census Metropolitan Area

CNC: Computer Numerical Control

COVID-19: Coronavirus Disease 2019

CRM: Customer Relationship Management

DEI: Diversity, Equity, and Inclusion

DMS: Digital Main Street

ERP: Enterprise Resource Planning

GDP: Gross Domestic Product

GMP: Guaranteed Maximum Price

GTA: Greater Toronto Area

GTHA: Greater Toronto and Hamilton Area

HVAC: Heating, Ventilation, and Air Conditioning

IIot: Industrial Internet of Things

IoT: Internet of Things

ISO: International Organization for Standardization

KPI: Key Performance Indicator

LGBTQ2S+: Lesbian, Gay, Bisexual, Transgender, Queer or Questioning, and Two-Spirit Plus

NEET: Not in Education, Employment, or Training

NOC: National Occupational Classification

OSAP: Ontario Student Assistance Program

PPE: Personal Protective Equipment

PQS: Professional Quantity Surveyor

PTSD: Post-Traumatic Stress Disorder

SEM: Search Engine Marketing

SEO: Search Engine Optimization

SHISM: Secondary School of Integrated Manufacturing

SHSM: Specialist High Skills Major

SME: Small and Medium-Sized Enterprise

ROI: Return on Investment

P&L: Profit and Loss

TEER: Training, Education, Experience and Responsibilities

4IR: Fourth Industrial Revolution

Executive Summary

Ontario's economy underwent significant change, both during and after the pandemic. While some sectors thrived and even experienced employment growth in the early days of COVID-19, public health protocols and changing consumer behaviour inevitably caused contraction. Manufacturing, construction, retail, and hospitality bore the brunt of this change, with all four sectors initially experiencing substantial decreases in employment. Deemed essential services early on, manufacturing and construction quickly recovered, while retail and hospitality took longer to balance.

Today, Ontario's labour market has not only fully recovered but exceeds pre-pandemic levels. Total employment increased from approximately 7.3 million in February 2020 to 7.7 million in December 2022; the province added 388,000 jobs, and all four impacted sectors rebounded. Manufacturing and construction each employed more workers in 2022 than in 2019, and hospitality and retail made strides to close the gap; in December 2022, they were just 7% and 3% below pre-pandemic levels, respectively.

Changes in demand can be viewed from a dual lens: first, the "return to normal activities" seen in late 2021 and 2022—including increased spending, resumption of travel, continued booms in residential and commercial development, and growing demand for products combined with persisting supply chain bottlenecks—created what is referred to as "pent up demand." Unusually strong demand for consumer products and services following a period of low activity also led to a boom in labour demand. While spending has somewhat stabilized and is likely to continue to cool as Canada officially enters a mild recession, employers in all affected sectors struggle to secure and retain workers.

Part of the demand challenge relates to sheer volume (i.e., insufficient number of workers available), whereas another part is tied to skill imbalances or mismatches. During the survival and recovery phases, all affected sectors underwent changes. Reacting to health policy conditions and shifting consumer demands, many businesses changed their business models, introduced new products and services, and looked to digitization and automation to fill gaps. Manufacturers, for example, invested in Industry 4.0 technologies like 3D printing or began experimenting with digital twinning; construction businesses ramped up Building Information Modeling (BIM) techniques to generate efficiencies in the built environment life cycle. Retailers leaned into intelligent retail, including e-commerce, augmented reality, and cashier-less stores; and hospitality businesses developed or leveraged digital tools and platforms to create high quality but largely contactless guest experiences. These and other changes create an environment of evolving skill needs. Although workers with soft skills are in high demand across the board, digital and technical skills are increasingly sought, at least at a foundational level. This reality further highlights a need for new entrants with foundational digital skills and upskilled current workers—who, through lived experience, possess critical domain knowledge—to take on more advanced or leadership roles.

In manufacturing, for example, in-demand roles like production supervisors and program managers require a suite of soft skills, including adaptability, time management, and problem solving, alongside technical and digital skills like proficiency with Enterprise Resource Planning (ERP), experience with the Scrum framework, and working knowledge of Jira. In construction, roles such as estimators and project coordinators need soft skills like verbal communication, planning, and leadership, alongside some technical and digital know-how that includes proficiency with On Centre software, Microsoft Project, and SharePoint.

Retail experienced the most substantial shift to digital. With storefronts shuttered, brick-and-mortal retailers moved online, learning to engage customers digitally to drive sales. Although small businesses tend to rely on “off-the-shelf” e-commerce platforms, they still need workers with the ability to leverage these tools. As such, roles often seen in the technology or financial sectors also became in demand in retail. Business analysts and digital marketing specialists are two examples; these roles necessitate workers with strong soft skills, including problem solving, but technical knowledge like understanding of design thinking and social media marketing is important, as are digital skills like proficiency with SQL, Agile methodology, Search Engine Optimization (SEO), and CRM tools like Salesforce.

To a lesser extent, hospitality also shifted to the online world during the pandemic. Hotels, in particular, led this change, and many introduced contact-free platforms to support guests and workers. Customer-facing roles, like team leads and salespeople, are still in high demand, but the nature of these roles has shifted somewhat. Undoubtedly, these workers still need exceptional soft skills, including reliability, adaptability, negotiation, and conflict resolution, as well as some technical knowledge and digital proficiency. Team leads need experience with Excel and ERP, and a knowledge of KPI (key performance indicator) measurement, including proficiency with tracking tools, while salespeople must come equipped with B2B sales experience and be proficient with CRM and CMS tools.

All four affected sectors face talent supply shortages, which are further exacerbated by existing barriers. Groups most impacted by the pandemic—namely women, newcomers to Canada, racialized people, and youth—tend to be overrepresented in these sectors, especially hospitality and retail. In contrast, women, in particular, are underrepresented in the manufacturing and construction sectors, signalling a gender diversity shortage and associated barriers, including pay equity. Racialized people face additional barriers to labour market participation. Recent research by Statistics Canada finds that newcomers to Canada are more likely to be subject to precarious employment.

Precarity can include factors such as unstable work and, in some cases, unsafe conditions. This became a clear concern early in the pandemic for essential workers. While, for the most part, essential workers were spared the brunt of job loss, other negative experiences caused some of them to rethink future employment in these fields and, in some cases, pivot their careers to other sectors. Challenges included chronic understaffing, uncertain work schedules, heightened exposure to the virus, and stressful engagements with customers. At the time, these realities were further compounded by the shutdown of community spaces, including community centres, places of worship, and libraries; the closure of educational institutions; and the curtailing or reduction of government services that many underrepresented groups rely on. Other core barriers articulated by workers in the affected sectors included the high cost of living in Ontario, reduction of public transit services, unclear information about career advancement opportunities and sectoral evolution, and challenges in accessing the training and upskilling needed to advance. Although some barriers are systemic in nature and will take time to fully correct, timely and granular labour market information, clear career pathways, and impactful upskilling programs are essential to bolster the talent pipeline and retain skilled workers.

Introduction

This report provides an in-depth analysis of structural changes in Ontario's economy and labour market as the province moves further into recovery from the pandemic. Four core sectors are the focal point of this work: manufacturing, construction, retail, and hospitality.

On the demand side, the report investigates macroeconomic shifts and their impact on labour, as well as other pandemic-driven changes, including new methods of doing business, changing consumer needs and behaviours, and increasing digitization. The supply analysis unravels the impact of demand shifts on workers, namely those most adversely impacted by the pandemic: women, youth, newcomers to Canada, and racialized populations. Leveraging extensive accounts of lived experience from Ontarians in the noted demographic groups, the supply analysis goes further to uncover barriers to participation and offer potential solutions for a truly equitable recovery.

This research is developed using mixed methods. Secondary research includes two literature reviews and analysis of datasets from Statistics Canada and other credible sources. Owing to the timely nature of this work, extensive primary research was conducted; this includes 29 interviews with industry leaders and employers in the four sectors, a survey completed by 525 employers across the four sectors, and focus groups that garnered participation from 165 Ontarians from impacted demographic groups. Supplemental primary research includes three advisory committee meetings with industry experts to review and validate research findings, and nearly a year of job and skill data collection and analysis to uncover career pathways and opportunities for advancement. The following roadmap guides readers through the content of this study.

Section I offers an economic and labour market outlook of the four sectors, pre (2013–2019), during (2020–2021) and "post" (2022 onward) pandemic. This section analyzes changes in these sectors in Ontario and compares them against the national lens and to other provinces.

Section II provides a detailed analysis of worker composition in the four affected sectors and unravels barriers, needs, and opportunities for change to better support the demographic groups most impacted. This section also produces sector profiles, including employment composition, education needs, the impact of digitization, and changing consumer trends.

Section III concludes with information on the jobs identified as both in-demand and capable of offering career advancement opportunities for current workers and new entrants. More than 20 career pathways are provided across the four sectors. This section also clarifies the responsibilities of in-demand roles and shines a spotlight on critical skills and skill importance.

SECTION 1

The COVID-19 Pandemic and Beyond

To thoroughly explore the workforce needs and pipeline of talent in construction, manufacturing, retail, and accommodation and food service (AFS) (hereafter referred to as “hospitality”), it is important to first examine the economic and labour market impacts of COVID-19 protocols in Ontario and Canada. This section includes the establishment of pre-pandemic sectoral performance as a baseline, then examines the pandemic's effects on these sectors and their workforce, including youth, women, newcomers, racialized populations, and other underrepresented groups. This section then dives into the state of recovery for affected sectors and impacted populations in Ontario.

1.1 The Before Times: Canada's Pre-Pandemic Economy and Labour Market: 2013–2019

1.1.1 National Lens

In the years leading up to the pandemic, Canada saw strong and steady labour growth in almost all sectors. Employment across the entire Canadian economy grew by 9% from January 2013 to January 2020, and most sectors employed more people compared to January 2013 levels. Figure 1.a shows the manufacturing sector was the exception to this, with flat, albeit fluctuating, growth in employment. Construction saw the largest growth in employment among the affected sectors during this time, followed by retail and hospitality.

Taking a closer look at the four affected sectors, as of January 2020, nearly one in five Canadians were employed in either manufacturing or retail. Retail was the largest employer, followed by manufacturing. Construction and hospitality were also significant employers, employing another 15% of Canada's labour market. In the months leading up to the pandemic, the four affected sectors accounted for nearly 35% of Canada's employment, or just over one-third of employed people.

Employment in Canada: An Overview

Industry Groups	Change in Employment from Jan 2013	Percentage of Employment Jan 2020	Average Change in Unemployment vs 2013
Total, All Industries	+9.0%	100.0%	−3.5%
Health Care and Social Assistance	+16.8%	13.2%	−4.4%
Retail Trade	+7.9%	11.7%	−2.2%
Manufacturing	-0.4%	9.1%	−5.0%
Professional, Scientific and Technical Services	+21.2%	8.1%	−2.9%
Construction	+11.6%	7.8%	−2.1%
Educational Services	+12.9%	7.3%	−0.3%
Accommodation and Food Services	+6.5%	6.5%	−2.5%
Finance, Insurance, Real Estate, Rental and Leasing	+15.8%	6.5%	−4.6%
All Other Industries	+4.0%	29.9%	−3.1%

Figure 1.a, Employment in Canada: Pre-Pandemic Period. Source: Statistics Canada: Tables 14-10-0022-01, 14-10-0023-01

From 2013 to 2020, all of Canada's largest sectors saw decreases in the unemployment rate.[3,4] This is at least partly driven by industry growth and the corresponding demand for workers. From a performance perspective, the four affected sectors saw growth in output, although not evenly. Specifically, construction's output (GDP) varied substantially depending on the year, and by January 2020 was nearly 8% above its January 2013 levels. The other three sectors saw more steady growth. By January 2020, construction and manufacturing contributed the most to national GDP among the four affected sectors, at 7.4% and 9.6%, respectively.

Employment in Canada: An Overview

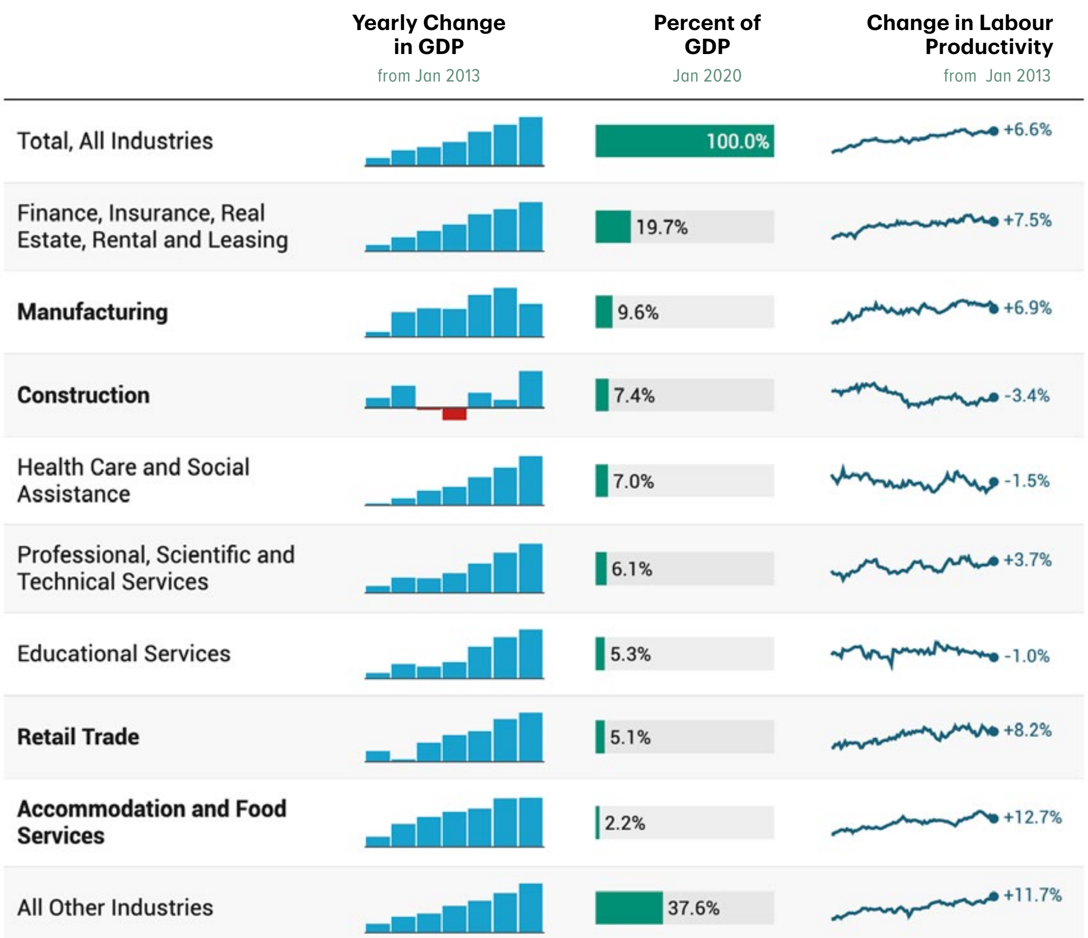


Figure 1.b, Industry in Canada: Pre-Pandemic Period. Source: Statistics Canada: Tables 14-10-0022-01, 36-10-0434-01

3 Largest as defined by employment.

4 The unemployment rate can be a challenging metric to contextualize because it captures more than one piece of information and is affected by multiple factors. For the purposes of this analysis, it is important to note that the unemployment rate can decrease because more individuals have found jobs but also because there is an increase in the number of individuals who are no longer searching for work. Only those individuals who are actively searching for work are included in the unemployment rate numbers.

Another trend emerges when comparing labour and output. Labour productivity, as measured by output per worker, had been increasing in many, but not all, of Canada's sectors. Notably, both retail and hospitality saw large gains in productivity, with increases of 8.2% and 12.7%, respectively. In essence, this means that the same number of employees were producing more in 2020 than in 2013. Manufacturing also saw productivity gains, but at a lower rate. Construction was the only sector that did not experience productivity growth, declining by 3.4% over the same period. Productivity declines or stagnation is a challenge for most industrialized economies.[5] Typically, in addition to labour, productivity increases are often related to investment in capital assets (e.g., machinery, facilities, etc.) or improvements in technology.[6]

1.1.2 Ontario and the Other Provinces[7]

Most Canadian provinces experienced similar employment changes during this period. Since 2013, in most provinces, the proportion of workers employed in the four sectors saw small decreases, but the actual number of employees grew.

Together, the four affected sectors are large contributors to employment in Canada's provinces

Proportion of Employment from Construction, Manufactuing, Retail, and Food & Accommodation 2013 - 2019

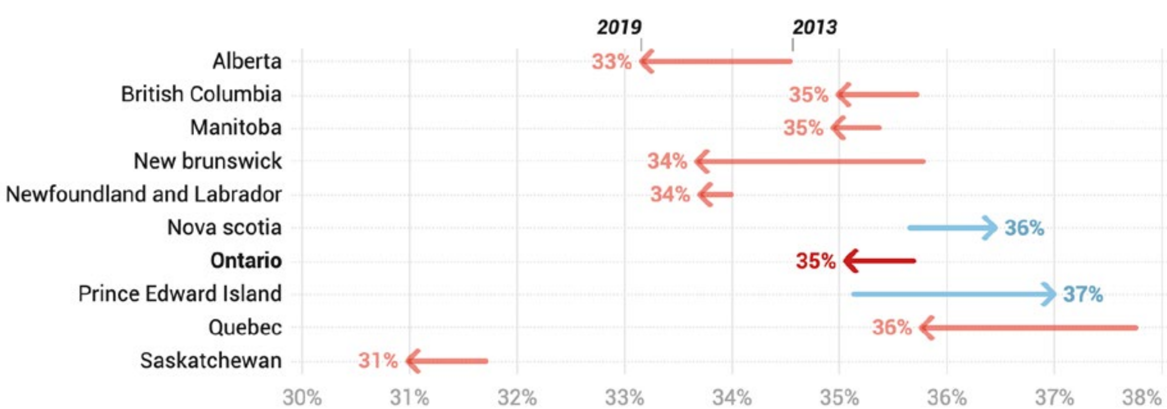


Figure 1.c, Employment in Affected Industries Across Provinces. Source: Statistics Canada: Table: 14-10-0023-01

The four affected sectors employ similar proportions of people when aggregated (Figure 1.c), but individually, they have varying levels of employment from province to province.[8] In Ontario, manufacturing proportionately employs more people than in Alberta, British Columbia (B.C.), and Nova Scotia.

5 Filipe Barbosa et al., "Reinventing construction through a productivity revolution," McKinsey Global Institute, February 27, 2017, https://www.mckinsey.com/capabilities/operations/our-insights/reinventing-construction-through-a-productivity-revolution

6 Paul Romer, "Endogenous Technical Change," Journal of Political Economy, October 1990, https://www.jstor.org/stable/2937632

7 Provincial data is available at the annual level, so the pre-pandemic period ends year-end 2019 with values adjusted to reflect the entire year, rather than January 2020 at the national level.

8 While it is important to get of sense of how Ontario compares to the all the other provinces, given its size, it is also important to understand how Ontario compares to the other large provinces, specifically those with large populations, economic output, and working populations.

As seen in Figure 1.d, manufacturing plays a large role in Ontario's economy but finds itself somewhere in the middle for employment. For retail, the provinces employ similar levels of talent, apart from Nova Scotia, whose retail sector is large.

Proportion of Canadians Employed in Selected Sectors

by province for the year 2019

	Ontario	Alberta	British Columbia	Nova Scotia	Quebec
Accommodation and Food Services	6.1%	6.3%	7.5%	7.5%	5.9%
Construction	7.3%	10.1%	9.4%	7.4%	6.2%
Educational Services	7.3%	6.7%	6.9%	7.9%	7.0%
Finance, Insurance, Real Estate, Rental and Leasing	8.0%	4.3%	6.2%	4.5%	5.5%
Health Care and Social Assistance	12.2%	12.5%	12.6%	15.8%	14.1%
Manufacturing	10.3%	5.9%	6.5%	6.9%	11.5%
Professional, Scientific and Technical Services	9.1%	7.8%	8.6%	6.0%	8.0%
Retail Trade	11.3%	10.8%	11.6%	14.6%	12.1%

Low High

Figure 1.d, Employment in Ontario Compared to Other Large Provinces. Source: Statistics Canada: Tables: 14-10-0023-01

The economic output of these sectors varies across provinces (Figure 1.e). At the national level, they account for just over 23% of Canada's GDP, whereas at the provincial level, their contribution ranges from 16% in Newfoundland and Labrador to 28% in Quebec. In addition, there were varying levels of change in GDP at the provincial level from 2013 to 2019. As visualized in Figure 1.e, the GDP generated from the four affected sectors in Ontario remained relatively stable at approximately 26%.

The proportion of GDP generated by the four affected sectors varies considerably by province

Proportion of Employment from Construction, Manufactuing, Retail, and Food & Accommodation 2013 - 2019

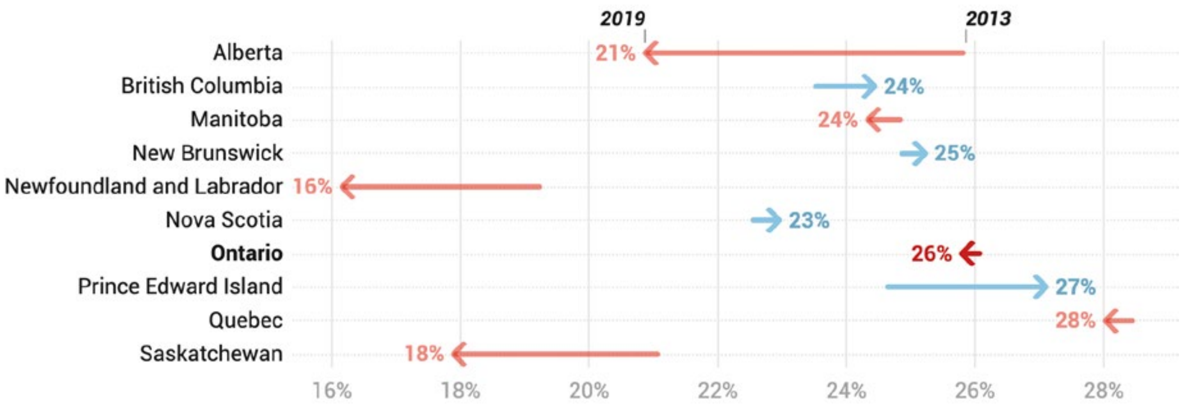


Figure 1.e, Output by Affected Industries Across Provinces. Source: Statistics Canada: Table: 36-10-0402-02

When breaking provincial GDP analysis down further, a different story unfolds than one told by labour analysis across Canada's largest provinces. Again, manufacturing is a large contributor to GDP in both Ontario and Quebec, with Quebec being the only province that saw higher proportional GDP. The other affected sectors—construction, retail, and hospitality—see similar levels of contribution to economic output across Canada's largest provinces.

Proportion of GDP Generated from Selected Sectors

by province for the year 2019

	Ontario	Alberta	British Columbia	Nova Scotia	Quebec
Accommodation and Food Services	**2.1%**	2.0%	3.0%	2.5%	2.3%
Construction	**7.1%**	7.3%	9.1%	6.6%	6.6%
Educational Services	**5.7%**	3.7%	5.1%	6.6%	5.9%
Finance, Insurance, Real Estate, Rental and Leasing	**22.8%**	14.3%	24.1%	22.3%	17.6%
Health Care and Social Assistance	**6.6%**	5.5%	6.9%	10.3%	8.1%
Manufacturing	**11.7%**	7.4%	6.6%	7.2%	13.2%
Professional, Scientific and Technical Services	**7.1%**	4.9%	6.9%	4.6%	6.5%
Retail Trade	**4.9%**	4.1%	5.8%	6.7%	5.9%

Low High

Figure 1.f, GDP in Ontario Compared to Other Large Provinces. Source: Statistics Canada: Table: 36-10-0402-02

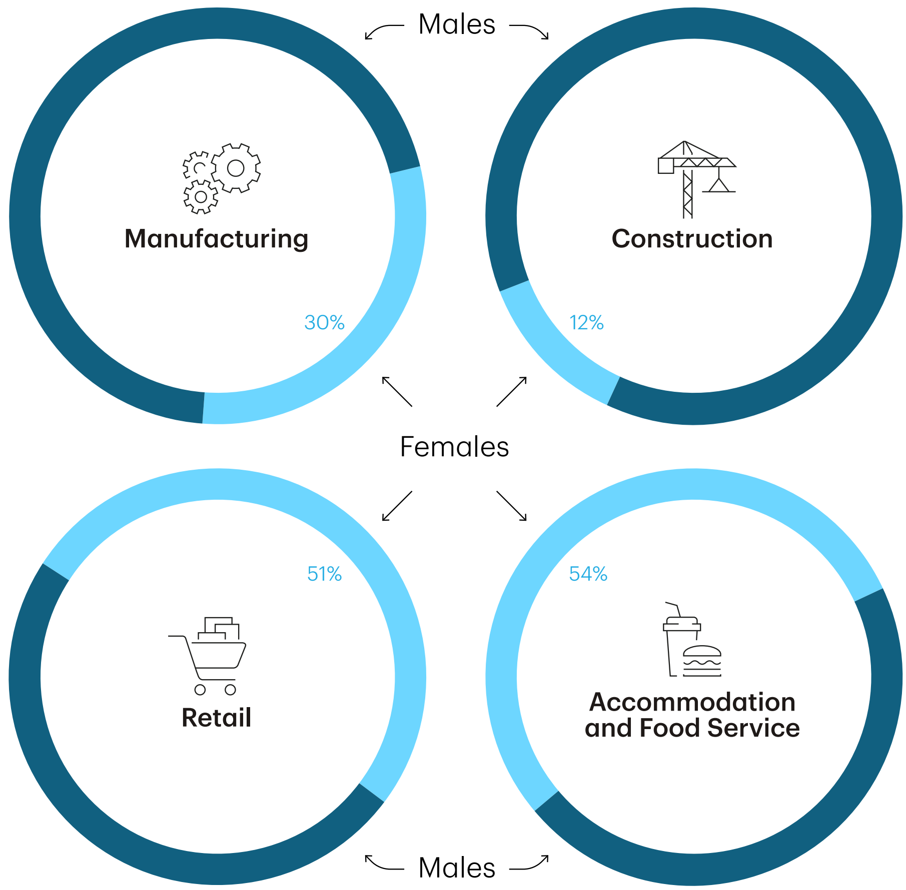
1.1.3 Affected Populations and Sectors in Ontario

Exploring the demographic composition of the workforce in the affected sectors,[9] representation varies. At year-end 2019, retail saw a more even split between men and women, and hospitality employed more women than men, but not by a substantial amount. It is important to note that the total employment share of women in Ontario's industry employment is approximately 47.5%; more women are working in both retail and accommodation compared to the provincial average. Gender parity is lacking significantly in the other two affected sectors, with women in Ontario constituting only 12% of the employed workforce in construction and 30% of the employed workforce in manufacturing.

9 Lack of data on racialized Canadians and newcomers.

In Ontario, females are underrepresented in both manufacturing and construction sectors

% of females in each of the four affected sectors; year end 2019



Data note: In 2019, females in Ontario made up 47.5% of the employed population

Figure 1.g, Participation Rates for Affected Sectors by Females. Source: Statistics Canada: Table: 14-10-0023-01

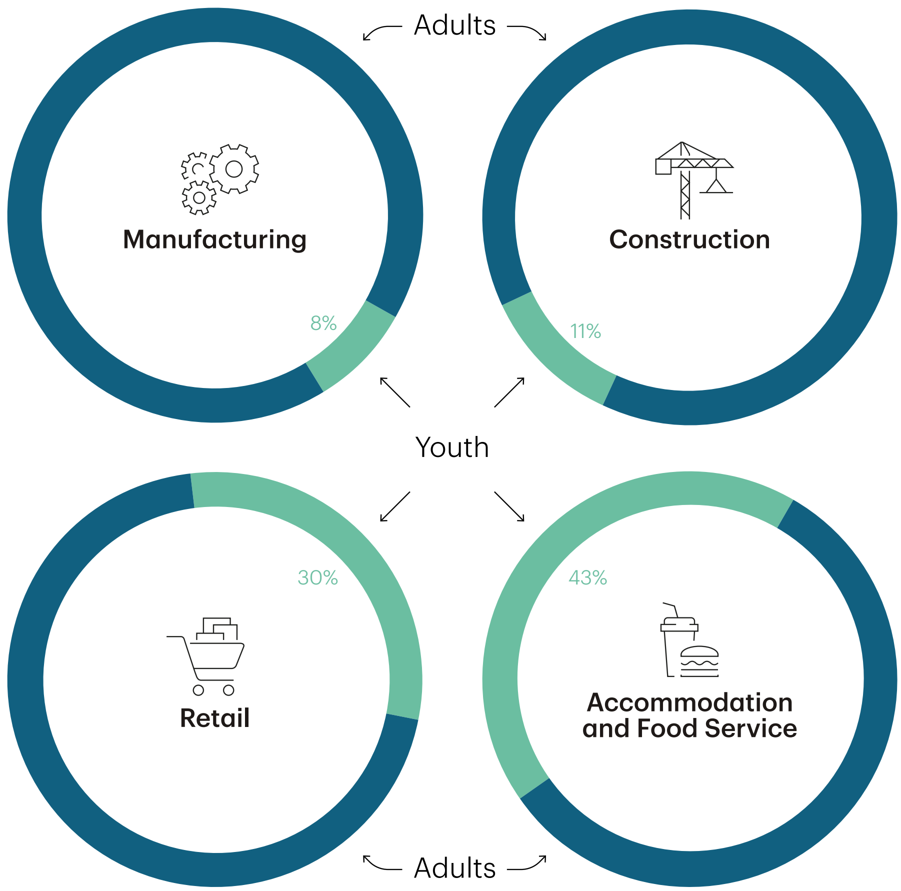
Similar to the proportion of women, youth aged 15–24 are overrepresented in the retail and hospitality sectors. In Ontario, youth make up 13.9% of the total employed population, but 30% of those employed in retail and 43% of those employed in hospitality. These proportions are not necessarily surprising given that many individuals will hold their first jobs in either of these two sectors.[10] What is notable is the underrepresentation seen in the construction and manufacturing sectors. Higher rates of youth employment in these areas are frequently seen,[11] but discussions with industry experts interviewed in this study offer a different perspective. Here, employers believed that many youths do not pursue employment opportunities in these sectors, often citing complicated training processes, lack of clarity on employment pathways, and little knowledge of longer-term employment opportunities as reasons.

9 GTA-based CivicAction reports that many young Canadians often enter the workforce through the retail sector. See: CivicAction, "Now Hiring: The Skills Companies Want that Young Canadians Need," December 2018, https://civicaction.ca/app/uploads/2021/03/SkillsConnect_NowHiring_Dec_2018_DIGITAL.pdf

10 As explored in ICTC's interviews with industry experts, many entry-level roles in construction and manufacturing do not necessarily require formal post-secondary education.

In Ontario, youth are substantially overrepresented in the hospitality sector, and make up a large portion of retail

% of youth in each of the four affected sectors; year end 2019



Data note: In Ontario, youth (age 15-24) make up 13.9% of the employed population

Figure 1.h, Participation Rates for Affected Sectors by Youth Aged 15-24. Source: Statistics Canada: Table: 14-10-0023-01

The pre-pandemic period in Canada and Ontario was characterized by strong labour and economic growth, and for the affected sectors, employment and economic performance were largely positive. These historical trends create a foundation that provides context for this study. The next sections explore the pandemic period, from the onset of the shutdowns to the end of 2021, followed by what this study refers to as a "recovery period" from 2022 onward.

1.2 In the Eye of the Storm: Canadian Economy and Labour Market During COVID-19: 2020–2021

In March 2020, government mandates to limit the spread of COVID-19 in Canada led to the closure of many in-person operations. Domestic transportation was shut down, effectively ceasing all recreational and business travel to mitigate the spread of COVID-19 and the resulting strain on public health systems. Businesses and organizations that could move their operations online were required to allow staff to work remotely.

Yet, some businesses had to stay open, at least to some degree. Businesses and workers were determined by governments as essential based on whether their offerings were critical for the health, safety, and wellbeing of the public. These included grocery stores, food preparation (delivery and takeaway only), hotels and other shared rental units, transportation services, and eventually certain manufacturing and construction subsectors.[12] Allowed to operate while others were shuttered, even essential businesses and their employees were impacted by these changes.

1.2.1 National Lens

At the national level, most sectors saw substantial declines in the number of people employed in those first few months following the March 2020 shutdowns. The mass adoption of remote working technologies allowed many organizations to resume operations virtually. For these businesses, further drops in employment productivity were short-lived, and some workers returned as businesses adapted to the new pandemic normal. For sectors that could not fully switch to remote work, employment loss was substantial.

As of December 2021, employment in the hospitality sector was approximately 18% below January 2020 levels, whereas the construction sector was 1.9% below its January 2020 levels. While manufacturing and retail regained their labour forces, growth in employment between January 2020 and December 2021 remained relatively flat. This is especially the case in comparison to employment gains in other sectors like finance, education, and healthcare (Figure 1.i).

11 Ibid.

Employment in Canada: In the Midst of the Pandemic

Pandemic period: January 2020 – December 2021

	Change in Employment from Jan 2020	Percentage of Employment Dec 2021	Average Change in Unemployment vs 2019
Total, All Industries	+1.3%	100.0%	22.8%
Health Care and Social Assistance	+3.4%	13.5%	42.4%
Retail Trade	+1.9%	11.8%	29.9%
Manufacturing	+1.3%	9.1%	27.6%
Professional, Scientific and Technical Services	+10.8%	8.9%	17.6%
Educational Services	+6.3%	7.7%	18.9%
Construction	-1.9%	7.6%	1.2%
Finance, Insurance, Real Estate, Rental and Leasing	+6.9%	6.8%	30.4%
Accommodation and Food Services	-17.8%	5.3%	84.4%
All Other Industries	-0.4%	29.4%	27.8%

Employment data adjusted for seasonality.

Figure 1.i, Employment in Canada: In the Midst of the Pandemic. Source: Statistics Canada: Table: 14-10-0022-01, 14-10-0023-01

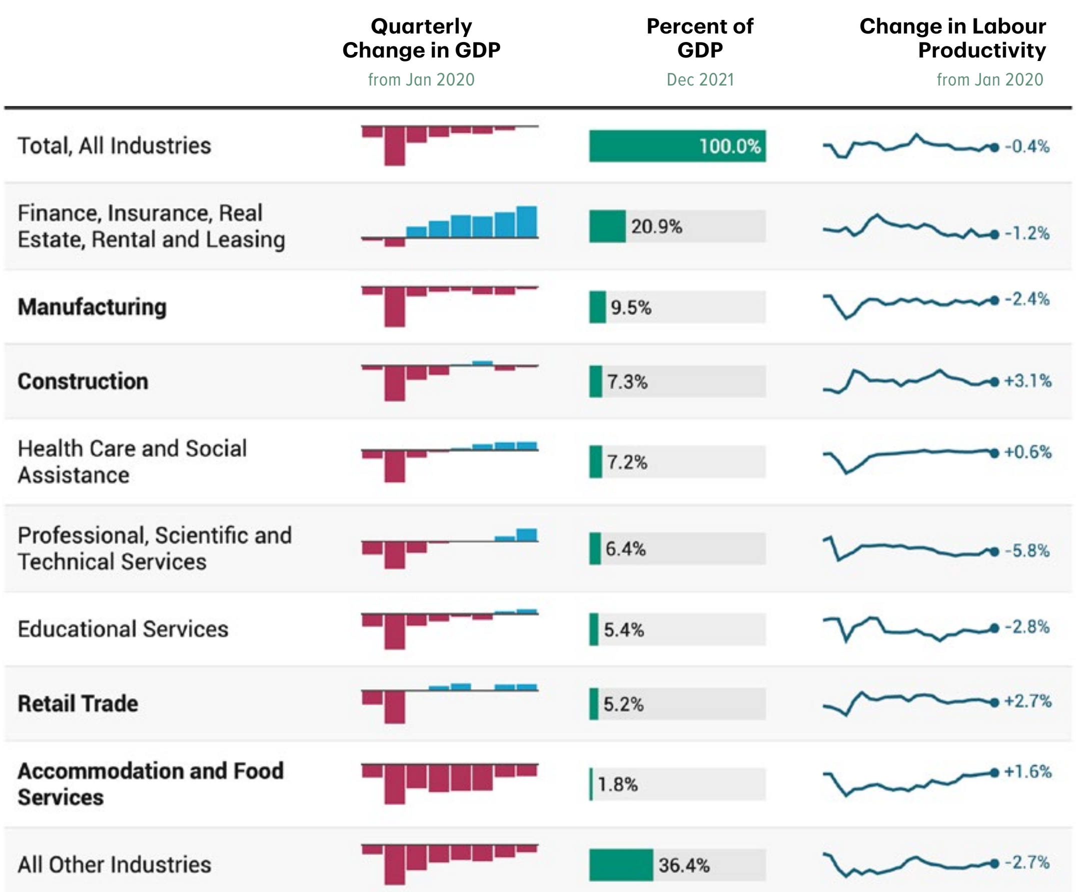
There were substantial increases in the average unemployment rate over 2020 and 2021 across all affected sectors except for construction.[13] Manufacturing, retail, and hospitality saw a steep rise in unemployment, but hospitality was by far the most negatively affected. This rise in unemployment is unsurprising given that hospitality is typically characterized by on-site business; the nature of the shutdowns meant there were few options to keep these businesses open or operating at full capacity.

13 It is not entirely clear why the construction sector saw such low increases in the unemployment rate. As discussed earlier, identifying the cause of change in the unemployment rate is difficult because changes in unemployment rate are affected by both the number of people looking for work and those that leave the labour force all together. Similarly, the increase in unemployment rates for finance sector are likely driven by talent migrating to those industries from other industries, as this industry was better sheltered from the effects of the shutdown.

The restructuring of labour across industries looks different when including economic output as part of the picture. Looking at the quarterly change in GDP (Figure 1.j), many sectors did not begin to recover until 2021. There are two exceptions: finance and retail. A Statistics Canada analysis found that finance & insurance was the sector with the greatest ability to adopt remote working.[14] Retail's output recovery began between October and December 2020, though this may be at least partially related to the holiday shopping season. While total holiday spending[15] in 2020 was down 18% from 2019,[16] increases in disposable income and personal savings, including through the induction of the Canada Emergency Response Benefit (CERB), may have also fueled a seasonal uptick.[17]

Industry in Canada: In the Midst of the Pandemic

Pandemic period: January 2020 – December 2021



Employment data adjusted for seasonality.

Figure 1.j, Industry in Canada: In the Midst of the Pandemic. Source: Statistics Canada: Table: 14-10-0022-01, 36-10-0434-01

14 Statistics Canada, "COVID-19 in Canada: A One-year Update on Social and Economic Impacts," March 2021, https://www150.statcan.gc.ca/n1/pub/11-631-x/11-631-x2021001-eng.htm

15 These estimates of holiday spending not only include shopping for gifts, but all holiday expenditure including travel, alcohol, and dining out.

16 Deloitte, "Holiday Spirits Prove Resilient: 2021 Holiday Retail Outlook," 2021, https://www2.deloitte.com/content/dam/Deloitte/ca/Documents/consumer-industrial-products/ca-en-consumer-industrial-products-holiday-retail-outlook-2021-aoda.pdf

17 The Bank of Canada notes that "disposable income of the average Canadian rose by an additional $1,800 in 2020" due to pandemic era income supports. See: https://www.bankofcanada.ca/2021/03/covid-19-savings-and-household-spending/

Apart from retail, economic output in the other affected sectors had not recovered by the end of 2021. Construction and manufacturing concluded 2021 closer to pre-pandemic levels but were still 0.5% and 1.2% below GDP compared to January 2020. As seen in Figure 1.i, hospitality was hit the hardest on this front, finishing 2021 about 17% below January 2020 levels.

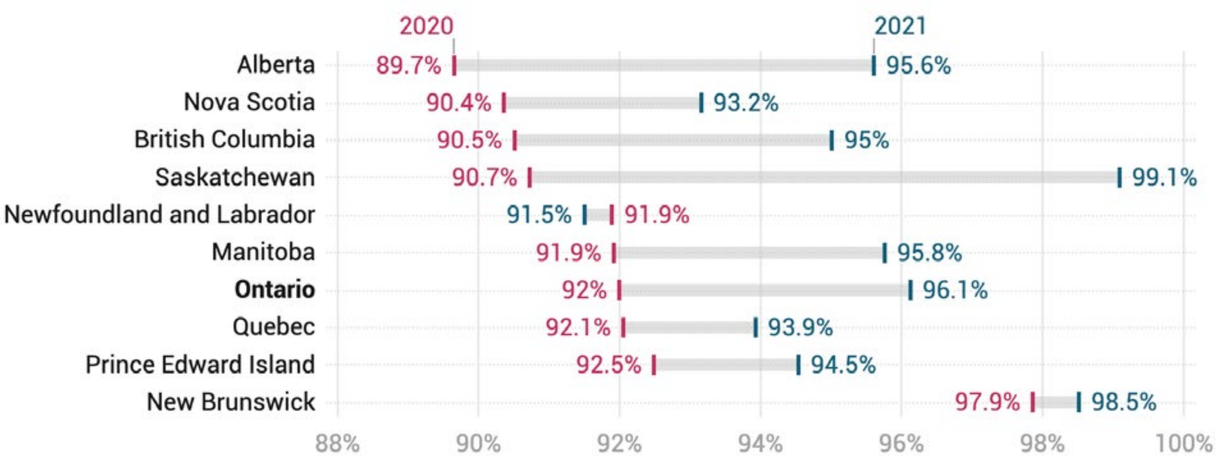
Another trend emerges when looking at productivity. In most sectors, productivity was down during this period. However, in construction, retail, and hospitality, productivity was up over the two years, meaning that output per worker was higher than before the pandemic. While some of this may be attributed to technological advancements boosting output, on the surface, in these areas, fewer employees were responsible for the same amount or more work.

1.2.2 Ontario and the Other Provinces

Similar trends appear across Canada. Across all provinces, employment in the four affected sectors fell. For the most part, provinces saw similar decreases in the amount of talent employed during the pandemic. However, as shown in Figure 1.k, not all provinces were affected similarly. For example, New Brunswick's affected sectors appear to have weathered the shutdown well. Ontario sits somewhere in the middle, appearing to have lost fewer employees than Alberta, B.C., and Nova Scotia, but not by a substantial amount.

Employment in four key industries saw substantial contractions in 2020, before beginning to recover in 2021

Relative Size of Employment Compared to 2019 Levels



Annual Data.

Figure 1.k, Employment Contraction in the Affected Sectors in 2020 and 2021. Source: Statistics Canada: Table: 14-10-0023-01

In 2021, all provinces, except for Newfoundland and Labrador, saw increases in employment in the four sectors. Out of the larger provinces, Ontario returned close to pre-pandemic levels, Alberta and B.C. saw similar recovery trajectories, while Nova Scotia and Quebec's economic recoveries lagged.

Programs were put in place to support pandemic-induced transition needs, such as the Digital Main Street - Digital Transformation Grant, the Ontario Together Fund, and the Ontario Small Business Grant. The success of these interventions comes with mixed reviews.[18] The need to adapt to changing economic conditions meant adopting new technologies and digital ways of doing business at a rate previously unforeseen. A report by the auditor general estimates that one in five of all businesses in Ontario implemented some type of online sales platforms as a result of the pandemic; the highest adoption rate was found in businesses with more than 100 employees. Despite a concerted effort to navigate the challenges of the pandemic, lost revenue in Ontario was second highest after Alberta and above the Canadian average.[19]

1.2.3 Disproportionate Labour Market Impacts

The shutdowns also did not affect all individuals equally. As explored earlier, youth and female participation rates across the four affected sectors varied. Ontario women saw heavy losses in employment in all affected sectors during the pandemic period. By the end of 2021, construction and hospitality employed women at levels well below the pre-pandemic period. In the manufacturing sector, despite women's share of the labour force remaining at proportionate levels prior to the pandemic, the number of women employed had substantially decreased overall.

For females in Ontario, employment levels vary relative to January 2020 levels and share of employment remains stable

Female Employment Across the Four Affected Sectors

		Share of Employment 2020	Share of Employment 2021
Accommodation and Food Services	-6.9%	56.1%	56.3%
Construction	-8.1%	12.6%	12.1%
Manufacturing	+6.8%	29%	30.7%
Retail Trade	+3.8%	51.2%	50.6%

Annual and monthly data. Monthly data is seasonally adjusted.

Figure 1.l, Women's Labour Levels Across the Four Affected Sectors. Source: Statistics Canada: Table: 14-10-0022-01, 14-10-0023-01

18 Office of the Auditor General of Ontario, "Value for Money Audit: COVID-19 Economic Response and Support for Businesses," December 2021, https://www.auditor.on.ca/en/content/annualreports/arreports/en21/AR_COV-Economic_en21.pdf

19 Ibid.

Youth in Ontario experienced a decrease in hospitality sector employment during the pandemic period. While many youths work in hospitality as their first jobs,[20] in 2020, their share of employment decreased from approximately 43% to approximately 40%. By 2021 youth employment was still below pre-pandemic levels in the sector.

Canadian youth were also disproportionately impacted due to education disruptions and their overrepresentation in the hardest-hit sectors. It is predicted that youth with lower levels of education or from low-income households are more likely to suffer the longer-term effects of higher unemployment, income loss, and social development.[21] Racialized youth face additional barriers. A recent report by Statistics Canada finds that racialized Canadians are less likely to find jobs with the same wages and benefits as their non-racialized and non-Indigenous counterparts.[22]

For youth in Ontario, employment in accommodation and food services remains largely below pre-pandemic levels

Youth Employment Across the Four Affected Sectors

	Change in Employment from January 2020	Share of Employment 2020	Share of Employment 2021
Accommodation and Food Services	-11.9%	39.6%	42.1%
Construction	-3.8%	12.8%	12.1%
Manufacturing	+4.9%	7.5%	8.6%
Retail Trade	+3.5%	28.7%	29.6%

Annual and monthly data. Monthly data is seasonally adjusted.

Figure 1.m, Youth Labour Levels Across the Four Affected Sectors. Source: Statistics Canada: Table: 14-10-0022-01, 14-10-0023-01

The pandemic also affected newcomers and underrepresented groups severely. These groups are more likely to be employed in precarious work arrangements and the sectors most affected by the pandemic.[23] For example, in the hospitality sector, racialized people account for the majority of employees. Additionally, unemployment rates for racialized people were substantially higher in the early days of the pandemic. People from Asian backgrounds and Asian newcomers also reported higher levels of harassment during the pandemic, potentially affecting their employment levels.[24]

20 See section 1.1.3

21 Parisa Mahboubi, Amira Higazy, "Lives Put on Hold: The Impact of COVID-19 Pandemic on Canada's Youth," C.D. Howe Institute, Commentary no. 624, July 2022, https://www.cdhowe.org/sites/default/files/2022-07/Commentary_624_R4.pdf

22 Statistics Canada, "Racialized Canadians are less likely to find as good jobs as their non-racialized and non-Indigenous counterparts early in their careers," Component of Statistics Canada catalogue no. 11-001-X, January 18, 2023, https://www150.statcan.gc.ca/n1/en/daily-quotidien/230118/dq230118b-eng.pdf?st=iAL_FikC

23 Statistics Canada, "The Social and Economic Impacts of COVID-19: A Six Month Update," September 2020, https://www150.statcan.gc.ca/n1/en/pub/11-631-x/11-631-x2020004-eng.pdf?st=A_yFnW0W

24 Ibid.

Indigenous peoples were also significantly affected during the pandemic, with many of the impacts tied to structural inequalities. A crowdsourced look at the experience of Indigenous peoples in Canada identified a 37% job loss rate.[25] Moreover, a higher proportion of Indigenous peoples report challenges meeting financial obligations compared to non-Indigenous people. Much of the financial impact appears to be driven by lower levels of liquidity.[26]

While the descriptive statistics during the pandemic are important, ultimately, they do not provide the full story of the disproportionate impact that the pandemic had on equity-seeking groups. The nature of shutdowns meant that services that many communities rely on, especially in the early months, were no longer available. The following is an overview of this disruption, and its impact on underrepresented groups, as identified via interviews and focus groups with impacted populations in this study.

The Closure of Schools and Day Care Services

For many working families, schools are both places of education and childcare. The closure of schools and the move to online learning meant that parents not only needed to adapt to their own changing work conditions but also supervise their children's transition to online education.[27] Analysis shows that women bore the burden of caring for young children during the pandemic, resulting in some deciding not to return to the labour force.[28] As one expert said, this experience was particularly bad for racialized women working on the front lines.

> *You can't leave a six-year-old child at home. And if you do not have paid care or you don't have the ability to pay for care, you really are stuck between a rock and a hard place. You have to stay home.* – Community Organization Representative (Women)

Closure of Higher-Ed Campuses and Libraries

The closure of higher education campuses and public libraries during the pandemic impacted many individuals, particularly lower-income equity-seeking groups who rely on institutional and public spaces to access the internet.[29] Research on equitable internet access found that 42% of Toronto residents without access to internet at home relied on internet provided by public libraries. A significant number of Toronto residents also relied on workplaces, businesses such as coffee shops, and the homes of friends and family to access internet.[30]

25 Ibid.

26 Ibid.

27 Jane Sims, "Daycare shutdown leaves Londoner to choose between pay and protecting toddler," The London Free Press, March 19, 2020, https://lfpress.com/news/local-news/column-daycare-shutdown-leaves-londoner-to-choose-between-pay-and-protecting-toddler

28 Sylvia Fuller and Yue Quan, "Covid-19 and The Gender Gap in Employment Among Parents of Young Children in Canada," Gender & Society, vol. 25, no. 2, (2021): 206–217, https://doi.org/10.1177/08912432211001287

29 Toward Common Ground, "The impact of COVID-19 on access to the internet and digital devices," VitalFocus, May 2021, http://www.towardcommonground.ca/en/resourcesGeneral/VitalFocus_DigitalDivide_03_AODA-May-12-2021.pdf

30 Sam Andrey, M.J. Masoodi, Nisa Malli, Selasi Dorkenoo, "Mapping Toronto's Digital Divide," Ryerson Leadership Lab and The Brookfield Institute for Innovation + Entrepreneurship, January 2021, https://www.toronto.ca/wp-content/uploads/2021/07/95dc-Mapping-Torontos-Digital-Divide.pdf

Low-income minorities might not have access to a laptop at home where they can build these skills. They heavily relied on pre-pandemic [systems] where they could actually go into places like a school... So, it was a bit harder for these individuals to access jobs online and be able to build skills online, especially not having a laptop, or a personal outlet that they can use, or something that's shared, or things like that. – Community Organization Representative (Underrepresented Groups)

The Closure of Government and Public Services

For many that identify as belonging to affected groups, the closure of many government services and the subsequent backlog upon reopening impacted their ability to find meaningful work.[31] Youth and newcomers who participated in ICTC's focus groups said that obstacles or delays in completing driving tests, renewing licences, or obtaining documents made it challenging to find or be eligible for work.

Many youth, newcomers, and underrepresented groups in Canada rely on public transportation to get to work, conduct errands, or more generally get around their community. While public transportation did not shut down, certain services were reduced.[32] As a result, accessing work becomes more difficult for those without access to a car. Adding to the challenge was the increased fear of health and safety concerns in public spaces during the pandemic.[33] As one employment services representative noted:

[Women and newcomers] didn't want to take public transportation because they felt they were in danger [and] endangering their personal health.

– Community Organization Representative (Underrepresented Groups)

31 Pat Doherty, Jeff Allen, and Steven Farber, "Giving up public transit during the coronavirus is a luxury many Canadians can't afford," University of Toronto, June 1 2020, https://uttri.utoronto.ca/news/giving-up-public-transit-during-the-coronavirus-is-a-luxury-many-canadians-cant-afford/

32 Codi Wilson, "About 25 per cent of former TTC riders say they won't take transit before COVID-19 vaccine is ready: survey," CP24, May 12, 2020, https://www.cp24.com/news/about-25-per-cent-of-former-ttc-riders-say-they-won-t-take-transit-before-covid-19-vaccine-is-ready-survey-1.4935313?cache=

33 Government of Canada, "Social determinants and inequities in health for Black Canadians: A Snapshot," September 8, 2020, https://www.canada.ca/en/public-health/services/health-promotion/population-health/what-determines-health/social-determinants-inequities-black-canadians-snapshot.html

Vaccine Uptake, Trust, and Health

Racialized Canadians inordinately work in low paying frontline work and were exposed to the virus in ways that individuals who were able to work from home were not.[34] This resulted in many leaving the workforce due to unsafe conditions:

[South Asian communities are] still kind of forced to be in frontline service delivery. So, there's been a lot of members of the community that are leaving the labour force because they're in unsafe frontline conditions where they're very much exposed to the virus. – Community Organization Representative (Underrepresented Groups)

The pandemic re-illuminated the challenges faced by many racialized communities and the importance of trust in institutions. Whether through distrust of the government or misinformation relating to the vaccines, Indigenous peoples and Black Canadians saw some of the lowest vaccination rates in Canada.[35] This, in turn, further marginalized these communities and meant that fewer jobs were available to them, or they were unable to maintain employment in sectors that required proof of vaccination:

And I think the other issue [facing] Indigenous people... was the fear of the vaccine. I know that there was a healthy percentage that were not getting vaccinated, which also prevented them from applying [for jobs], particularly right in the height of the pandemic. – Community Organization Representative (Underrepresented Groups)

The experiences of the affected populations during the pandemic as well as the barriers to employment for women, youth, and equity-seeking groups will be further explored in this report.

34 Government of Canada, "Social determinants and inequities in health for Black Canadians: A Snapshot," September 8, 2020, https://www.canada.ca/en/public-health/services/health-promotion/population-health/what-determines-health/social-determinants-inequities-black-canadians-snapshot.html

35 Government of Canada, "COVID-19 vaccination coverage by ethnicity: Insight from the Canadian Community Health Survey (CCHS)," June 17, 2022, https://www.canada.ca/en/public-health/services/immunization-vaccines/vaccination-coverage/covid-19-vaccination-coverage-ethnicity-insight-canadian-community-health-survey.html

1.3 Path to Recovery: Canadian Economy and Labour Market post-Pandemic: (to) 2022 and Beyond

Through 2022, many of the restrictions posed by public health mandates began to disappear. On February 14, 2022, the Government of Ontario announced that as of February 17, 2022, public health measures would ease, increasing social gathering sizes and business capacity limits.[36] Similarly, on February 15, 2022, the Government of Canada announced that as of February 28, 2022, border measures would be lightened, including the easing of on-arrival testing for fully vaccinated travellers.[37] On October 1, 2022, the federal government removed the remaining travel restrictions, including requiring proof of vaccination, use of the ArriveCAN app, and stopped requiring travellers to pre-test before arriving.[38]

1.3.1 National Lens

By year-end 2022, labour levels in all industries except retail and hospitality had returned to or surpassed pre-pandemic levels. Employment levels in manufacturing remained flat, but that followed the trend of flat growth over the previous 10 years. Retail stayed close to its pre-pandemic levels, but was still below January 2020 levels by 2.3%. The hospitality sector still struggled and has not returned to pre-pandemic levels, falling from employing 6.5% of the workforce in Canada to 5.6%.[39] Despite not fully recovering, retail and hospitality unemployment rates are now improving.

36 Government of Ontario, "Ontario Moving to Next Phase of Reopening on February 17," February 2022, https://news.ontario.ca/en/release/1001600/ontario-moving-to-next-phase-of-reopening-on-february-17

37 Public Health Agency of Canada, "Government of Canada lightens border measures as part of transition of the pandemic response," February 2022, https://www.canada.ca/en/public-health/news/2022/02/government-of-canada-lightens-border-measures-as-part-of-transition-of-the-pandemic-response.html

38 Public Health Agency of Canada, "Government of Canada to remove COVID-19 border and travel measures effective October 1," https://www.canada.ca/en/public-health/news/2022/09/government-of-canada-to-remove-covid-19-border-and-travel-measures-effective-october-1.html

39 Statistics Canada, Table 14-10-0291-02 Labour force characteristics by industry, monthly, seasonally adjusted (x 1,000), https://doi.org/10.25318/1410029101-eng

Employment in Canada: Recovery

Post-Pandemic Period: January 2022 – December 2022

	Change in Employment from January 2020	Percentage of Employment December 2022	Average Change in Unemployment vs 2021
Total, All Industries	+3.2%	100.0%	−29.3%
Health Care and Social Assistance	+3.1%	13.2%	−11.1%
Retail Trade	-2.3%	11.1%	−30.6%
Professional, Scientific and Technical Services	+18.5%	9.3%	−16.0%
Manufacturing	+0.8%	8.8%	−28.9%
Construction	+3.5%	7.8%	−20.7%
Educational Services	+6.6%	7.5%	-5.3%
Finance, Insurance, Real Estate, Rental and Leasing	+10.3%	6.9%	−27.8%
Accommodation and Food Services	-11.1%	5.6%	−39.8%
All Other Industries	+2.5%	29.7%	−33.2%

Employment data adjusted for seasonality.

Figure 1.n, Employment in Canada: Recovery. Source: Statistics Canada: Table: 14-10-0022-01, 14-10-0023-01

Looking at economic output, again, many of Canada's sectors recovered by the end of 2022. However, as with impacts, recovery is not equal. Some sectors, like finance or professional and scientific services, have made substantial gains in economic growth over the pandemic and recovery period, whereas construction, manufacturing, and retail experienced more modest gains. By the end of 2022, construction saw GDP growth of 2% above January 2020 levels. For manufacturing, growth was approximately 0.5%, and retail was closer to 4% growth. Hospitality, on the other hand, was still more than 6% below its January 2020 GDP levels.

Industry in Canada: Recovery

Pandemic & Recovery Period: January 2022 – December 2022

	Quarterly Change in GDP from January 2020	Percent of GDP November 2022	Change in Labour Productivity from January 2020
Total, All Industries		100.0%	+0.5%
Finance, Insurance, Real Estate, Rental and Leasing		20.2%	-3.8%
Manufacturing		9.3%	-0.9%
Construction		7.3%	-0.3%
Health Care and Social Assistance		7.2%	+2.9%
Professional, Scientific and Technical Services		6.6%	-5.0%
Educational Services		5.3%	-3.5%
Retail Trade		5.2%	+6.7%
Accommodation and Food Services		1.9%	+5.1%
All Other Industries		37.0%	-0.1%

Industry and Employment data adjusted for seasonality.

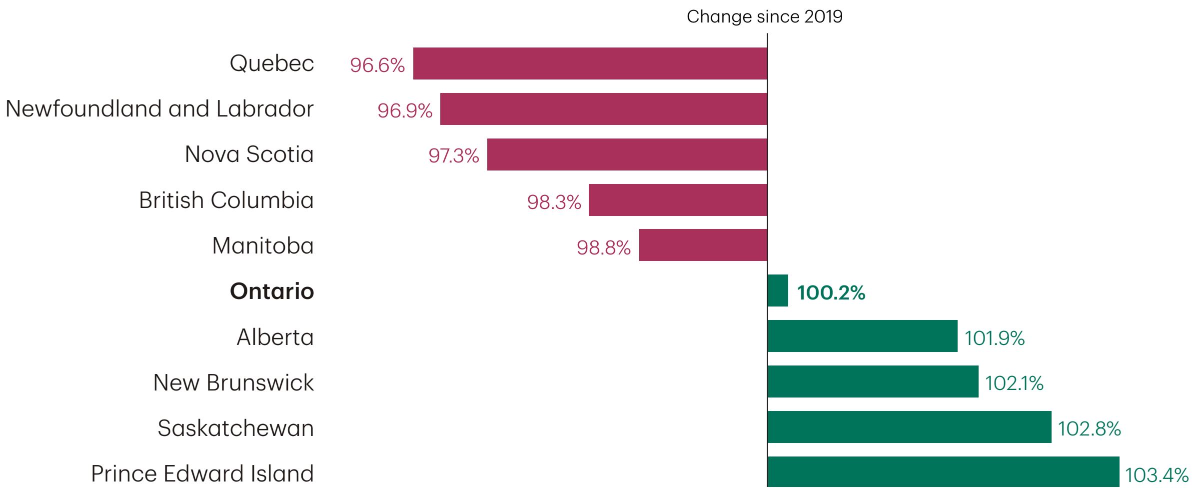
Figure 1.o, Industry in Canada: Recovery. Source: Statistics Canada: Table: 14-10-0022-01, 36-10-0434-01

1.3.2 Ontario and the Other Provinces

At the provincial level, employment recovery within affected sectors has not been even, either. In many Canadian provinces, employment in these sectors remains below pre-pandemic levels. Of Canada's largest provinces, only Alberta and Ontario have returned to pre-pandemic employment. As seen in the national analysis, recovery within the four affected sectors has not been even, with manufacturing and construction returning to pre-pandemic levels faster than retail and hospitality.

In many provinces employment in the four affected sectors remains below pre-pandemic levels

Relative Size of Employment Compared to 2019 Levels



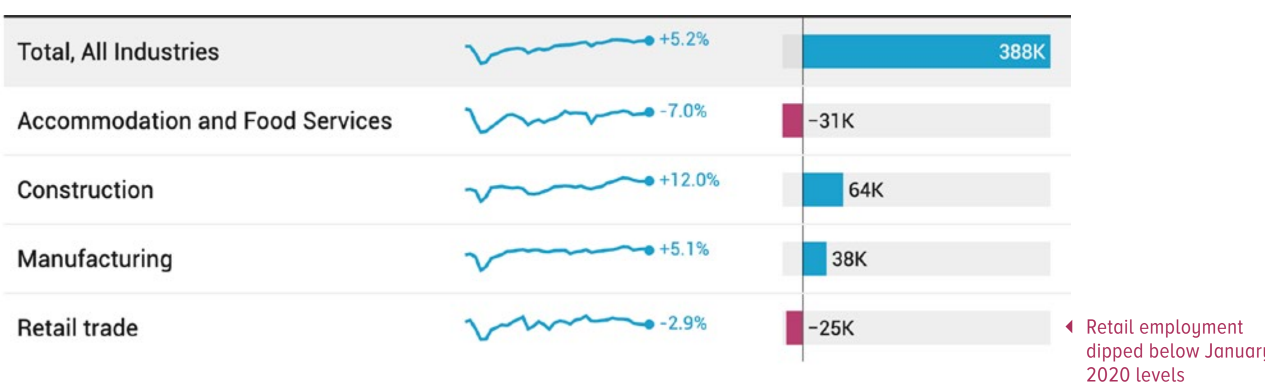
Annual Data.

Figure 1.p, Employment Contraction in the Affected Sectors in 2022 vs. 2019. Source: Statistics Canada: Table: 14-10-0023-01

Total employment in Ontario increased from approximately 7.3 million people in February 2020 to around 7.7 million in December 2022. In other words, the labour market as a whole has fully recovered from the decline it experienced during the pandemic. In fact, the province added 388,000 jobs—an increase of around 5.2%. However, not all industries enjoyed a total recovery. Total employment in the hospitality sector in December 2022 was 7% below the pre-pandemic levels, resulting in a net reduction of 31,000 jobs. Despite early economic recoveries in retail, the sector was almost 3% below its pre-pandemic employment level in December 2022, totalling a loss of 25,000 jobs.

By the end of 2022, Ontario's Accommodation and Food Service (hospitality) sector had still not recovered

Employment Levels in Ontario from January 2020 to December 2022



Annual Data.

Figure 1.q, Employment Levels Across the Four Affected Sectors. Source: Statistics Canada: Table: 14-10-0023-01

In contrast, both the manufacturing and construction sectors had higher employment rates in December 2022 compared to pre-pandemic levels. In Ontario, employment in manufacturing grew by almost 6% or 38,000 jobs. Employment in construction grew by approximately 12%, or 64,000 jobs (Figure 1.r).

The State of Construction

During the pandemic, the construction sector proved highly flexible in adapting to COVID-19 protocols and returning workers to job sites. By building in additional health and safety procedures such as screening, site cleaning protocols, limited touch points, and other hygiene measures,[40] the sector quickly rebounded. However, despite a fast recovery in the number of people employed, discussion with experts points to a sector that faces significant labour challenges, including an unstable talent pipeline, unclear job paths for potential employees, and a significant shortage of people at the management level.

Prior to being labelled an essential service in Ontario,[41] pandemic shutdowns created labour issues for construction, which continue to have cascading effects. Construction projects adhere to specific procedures and timing: for example, framing and concrete pouring need to happen before electrical and drywalling. Social distancing and the need to stagger work schedules caused challenges, and new protocols meant that few team members were allowed on site, leading to bottlenecks in work.[42] Conversations with experts identified that even though the sector was deemed essential, temporary layoffs and worksite closures in the early period of the pandemic were common, and they created a labour shortage, with many workers moving on, finding work elsewhere.[43] Although talent supply is a big challenge, showcasing the importance of construction and how it impacts the broader economy can be key in widening the talent pool.

The State of Manufacturing

The impact of the pandemic on Ontario's manufacturing sector can be seen when comparing the revenue from goods manufactured in Ontario to the total revenue from goods manufactured throughout Canada. From 2019 to 2020, Canada's revenue from manufactured goods dropped by $70 million, from $704 to $634 million. Ontario's manufacturing sector was the most impacted of all provinces, accounting for $34 million (49%) of the total decrease in revenue from goods manufactured in Canada.[44]

40 Canadian Construction Association, "COVID-19 – Standardized Protocols for All Canadian Construction Sites," April 16, 2020, https://www.cca-acc.com/wp-content/uploads/2020/04/CCA-COVID-19-Standardized-Protocols-for-All-Canadian-Construction-Sites-04-16-20.pdf

41 "What's essential? List of services and workplaces allowed to be open gets smaller," CTV News, March 24, 2020, https://toronto.ctvnews.ca/what-s-essential-list-of-services-and-workplaces-allowed-to-be-open-gets-smaller-1.4865668

42 Canadian Construction Association, "COVID-19 – Standardized Protocols for All Canadian Construction Sites," April 16, 2020, https://www.cca-acc.com/wp-content/uploads/2020/04/CCA-COVID-19-Standardized-Protocols-for-All-Canadian-Construction-Sites-04-16-20.pdf

43 The labour shortage in this case refers to the supply necessary to complete on-going projects, which was still insufficient given the return to pre-pandemic levels of employment.

44 Statistics Canada, "Principal statistics for manufacturing industries, by North American Industry Classification System. Table: 16-10-0117-01," https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1610011701&pickMembers%5B0%5D=1.1&pickMembers%5B1%5D=3.1&cubeTimeFrame.startYear=2018&cubeTimeFrame.endYear=2021&referencePeriods=20180101%2C20210101

The four areas responsible for over half of sales include motor vehicles and parts, food products, chemicals, and primary metals.[45] Ontario's manufacturing sector was and remains affected by the global shortage of semiconductor chips, an integral component of vehicle manufacturing. Ontario's manufacturing sector is also vulnerable to material shortages, given its high degree of global integration and heavy reliance on imports.[46]

Subject-matter experts from the manufacturing sector spoke to the unstable supply of manufacturing inputs and the drop in demand for many products during the pandemic. In North America, for example, delays due to backed-up shipping hindered the unloading process.[47]

The post-pandemic labour markets present several challenges for the manufacturing sector, including the impact of automation, which can lead to a net workforce reduction. Technology is constantly evolving and improving, and one notable development at the intersection of technology and manufacturing is 3D printing.[48] Interviewees note that the move from manual control to computer control in manufacturing processes was inevitable, as machines are now able to self-modulate and—to a degree—learn from previous experiences. A post-pandemic survey of Canadian manufacturers suggests an appetite for continued investment in emerging manufacturing technologies, such as Industrial Internet of Things (IIot).[49]

The State of Retail

The pandemic disrupted many retail business models, leading to the rapid acceleration of e-commerce and the decline of traditional brick-and-mortar retail stores.[50] The post-pandemic state of retail varies greatly depending on retailer size.[51]

45 Statistics Canada, "Manufacturing sales by industry and province, monthly. Table: 16-10-0048-01," https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1610004801

46 Ontario Chamber of Commerce, "2022 Ontario Economic Report," 2022, https://occ.ca/wp-content/uploads/2022-Ontario-Economic-Report.pdf

47 Advanced Technology Services, "How has the Coronavirus Impacted Manufacturing?" https://www.advancedtech.com/blog/how-is-the-coronavirus-impacting-manufacturing/

48 Creig Lamb, Matt Lo, "Automation Across the Nation: Understanding the potential impacts of technological trends across Canada," The Brookfield Institute for Innovation + Entrepreneurship, June 2017. https://brookfieldinstitute.ca/wp-content/uploads/RP_BrookfieldInstitute_Automation-Across-the-Nation.pdf

49 Plant & Canadian Manufacturing, "2022 Advanced Manufacturing Outlook Report," September 2022, https://www.ngen.ca/hubfs/PLT_AdvMfg_Sept2022_LAZ%20DE.pdf

50 EDC Economics, "COVID-19 How Covid-19 is Change the Retail Sector, Export Development Canada, March 2021. https://www.edc.ca/content/dam/edc/en/premium/guide/covid-19-retail-sector-impact.pdf

51 Ibid.

For example, smaller retailers that traditionally relied on customer foot traffic in brick-and-mortar establishments were among the most impacted, while large retailers were more likely to have digital options, namely e-commerce channels, and fewer restrictions.

The retail sector competes for workers with other customer service-oriented industries across Canada. In the face of structural labour shortages in Ontario, it is unlikely that retailers, large and small, will be able to return to their pre-2020 recruitment and talent management practices. The pandemic and its impacts also sent many retail workers seeking other jobs altogether.[52]

A challenge faced by the retail sector in the aftermath of the pandemic is high turnover among employees, partly related to mental health. As one industry professional stated:

> *We're seeing a very high turnover rate. I think naturally we can equate this to the pandemic being a very hard time on people emotionally, and they've had a very hard time developing the hard skills and the emotional skills to be able to overcome challenges.* – Industry Expert (Retail)

The State of Hospitality

While only 12.4% of employment in the hospitality sector relates to accommodation services (i.e., the remaining 87.6% is dominated by food services and drinking places),[53] sales in food service and drinking places fell by over 30% from 2019 to 2020. By 2021, they were still only about 80% of their 2019 levels.[54] Furthermore, Ontario's hotel occupancy rates went from 69% in 2019 to 35% in 2020, and as of 2022, occupancy crept up to above 55%.[55]

The pandemic has significantly affected the hospitality workforce, exacerbating existing issues and highlighting the need for more stable and sustainable work conditions. At the end of 2022, youth aged 15 to 24 comprised 42.8% of the sector in Ontario, but youth were especially impacted by the public health measures, and some have left the sector for greater economic security.[56] In general, high attraction and retention rates pre-pandemic have given way to high turnover since the outbreak of COVID-19, particularly among new hires. Industry experts highlighted a prevalence of "quick quits," or the departure of an employee within 90 days of starting employment.[57]

52 Kimberly Bowman, et al., "Pathways Forward: Mapping Job Transitions for Ontario Food Retail Workers," Brookfield Institute for Innovation + Entrepreneurship, June 2021, https://brookfieldinstitute.ca/wp-content/uploads/BIIE-Job-Pathways-food-II-FINAL.pdf, 14

53 Statistics Canada. Table 14-10-0392-01 Employment by industry, annual (x 1,000). https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410039201

54 Service Canada (Ontario), "Outlooks for COVID-19 Impacted Occupations in Ontario," Government of Canada, 2020, https://jobbank-guichetemplois.service.canada.ca/Prospect_reports/2020NOCCovidReport_E.pdf

55 Ibid.

56 International Labour Organization, "The future of work in the tourism sector: Sustainable and safe recovery and decent work in the context of the COVID-19 pandemic," April 2022, https://www.ilo.org/wcmsp5/groups/public/ed_dialogue/sector/documents/meetingdocument/wcms_840403.pdf

57 A 2021 report by McKinsey & Company found that throughout the Australia, Canada, Singapore, the United Kingdom, and the United States workforces, up to 40% of employees were considering leaving their current job within the next three to six months. See: Aaron De Smet, et al., "'Great Attrition' or 'Great Attraction'? The choice is yours?" McKinsey Quarterly, September 8, 2021, https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/great-attrition-or-great-attraction-the-choice-is-yours

The pandemic also drove a decrease in youth entering the hospitality sector, alongside an increase in accelerated retirements and layoffs. Layoffs and furloughs in hotels and restaurants, which were previously steady operations, resulted in unprecedented staffing challenges. Moreover, the shortage of staff resulted in a decrease in operational capacity and posed a negative impact on financial performance.

1.3.3 Affected Populations in Ontario

By the end of 2022, women working in Ontario's affected sectors still have not returned to pre-pandemic levels of employment, except for in the manufacturing sector. As seen in the pandemic period analysis, women working in retail had recovered to above pre-pandemic levels by the end of 2021 but, by the end of 2022, returned to below pre-pandemic levels. This follows what was seen at the national level; employment in retail experienced a temporary recovery followed by a drop toward the end of 2022. Women took an even larger share of employment and were even more over-represented in the sector than before the pandemic.

With the exception of manufacturing, female employment across the key sectors has not returned to pre-pandemic levels

Female Employment Across the Four Key Sectors; January 2020 – December 2022

	Change in Employment from January 2020	Share of Employment 2021	Share of Employment 2022
Accommodation and Food Services	-12.4%	56.3%	54.6%
Construction	-5.7%	12.1%	11.5%
Manufacturing	+8.4%	30.7%	28.6%
Retail Trade	-5.9%	50.6%	53.8%

Annual and monthly data. Monthly data is seasonally adjusted.

Figure 1.r, Women's Labour Levels in Ontario Across the Four Affected Sectors.
Source: Statistics Canada: Table: 14-10-0022-01, 14-10-0023-01

In manufacturing, despite a decrease in women's share of employment, actual levels of employment have grown. This is partially because of overall employment growth in Ontario's manufacturing sector: 5.1% above pre-pandemic levels. For construction, women's share of the employed labour force remained somewhat steady from 2021 to 2022, but the total number of women employed in construction decreased, highlighting continued underrepresentation. In hospitality, women's share of employment dropped back to closer to pre-pandemic levels, but the number of women working in the sector fell. By the end of 2022, the sector lost more than one woman for every 10 it employed pre-pandemic.

Despite early recovery in retail, youth employment is largely below pre-pandemic levels

Youth Employment Across the Four Key Sectors; January 2020 – December 2022

	Change in Employment from January 2020	Share of Employment 2021	Share of Employment 2022
Accommodation and Food Services	-9.5%	42.1%	42.8%
Construction	+5.3%	12.1%	11.7%
Manufacturing	+4%	8.6%	8.6%
Retail Trade	-6.6%	29.6%	30.3%

Annual and monthly data. Monthly data is seasonally adjusted.

Figure 1.s, Youth Labour Levels in Ontario Across the Four Affected Sectors.
Source: Statistics Canada: Table: 14-10-0022-01, 14-10-0023-01

Recovery and the "return to work" have propped up many of the services that were shut down during the pandemic. Most universities, public libraries, and other places that underserved groups utilize to access digital services and technologies have reopened.[59] Services that youth and underrepresented groups rely on to succeed in Canada are also open again and easier to access. In addition, public transit has mostly resumed to pre-pandemic service levels,[60] and overall immigration has resumed, which will help address the demand for labour.

The caregiver conundrum is also improving as schools and childcare centres reopened after the pandemic and the federal childcare plan began to roll out across the provinces.[61] New research from Statistics Canada finds that more women than ever are participating in the labour force,[62] and some of this is driven by access to childcare. This finding is supported by previous research showing that access to affordable childcare is a key indicator of women's labour force participation.[63]

59 University Affairs, "COVID-19: Updates for January 2022," https://www.universityaffairs.ca/news/news-article/covid-19-updates-for-january-2022/; Toronto Public Library, "COVID-19 Information," https://torontopubliclibrary.typepad.com/programming/our-reopening-plan.html

60 Though Ontario public transit agencies such as TTC and Metrolinx are still struggling to recover their pre-pandemic ridership levels in some cases. Furthermore, ridership patterns are reported to have evolved during the pandemic years. See: Vanessa Balintec, "Riders are coming back but transit agencies warn they're not fully up to speed after COVID-19," CBC News, June 2022, https://www.cbc.ca/news/canada/toronto/commuters-return-sector-recovery-1.6497882

61 Employment and Social Development Canada, "Toward $10-a-Day: Early Learning and Child Care," Government of Canada, December 6, 2022, https://www.canada.ca/en/employment-social-development/campaigns/child-care.html

62 Jeannine N. Bailliu and Danny Leung, "Measuring the value of women's contribution to the Canadian economy: New insights based on recent work," Statistics Canada: Economic and Social Reports, February 2023, https://doi.org/10.25318/36280001202300200001-eng

63 Pierre Lefebvre and Philip Merrigan, "Child- Care Policy and the Labor Supply of Mothers with Young Children: A Natural Experiment from Canada," Journal of Labor Economics, vol. 26, no. 3 (2008), https://doi.org/10.1086/587760

SECTION 2

Bolstering the Supply Pipeline: Building a Resilient and Equitable Labour Market

2.1 Employment Experiences: Job Opportunities, Mobility, Growth

Broad Labour Market Supply Trends

As a whole, Ontario's labour market has rebounded from the pandemic and is experiencing above pre-pandemic employment. As of February 2023, Ontario has 7.9 million employed individuals, which is up from the 7.7 million that were employed at the year-end of 2022.[62] The province's labour force participation is strong and reflective of Canada's national rate of 65.5%.[63] Since February 2022, Ontario's unemployment rate decreased to 5.1%.

62 Government of Ontario, Ontario's labour market: https://www.ontario.ca/page/labour-market#reports.

63 "Table 3: Labour force characteristics by province, seasonally adjusted," Statistics Canada, Labour Force Survey, February 2023, March 10, 2023, https://www150.statcan.gc.ca/n1/daily-quotidien/230310/dq230310a-eng.htm

Throughout autumn 2022 and early 2023, economists and financial institutions were warning of a significant recession in Canada.[66] These recession fears are driving uncertainty across the Canadian economy. On top of this, Ontario's employers are also facing a historically low unemployment-to-job-vacancy ratio.[67] With a smaller number of available workers in the labour pool, employers across the affected sectors report an inability to find enough workers to fulfill critical business operations. Undoubtedly, Canada's economy is facing long-term structural labour shortages,[68] and this challenge is likely to persist and evolve.

Demand for labour in Ontario during the post-pandemic period has increased, with continued growth anticipated.[69] Yet, an insufficient supply of talent was repeatedly raised by interviewees as a significant challenge. This labour shortage goes beyond concerns of a skill gap—where workers do not have the needed skills for a given job. Although that challenge is at times present, overall, employers note simply struggling to find enough workers. Additionally, as more and more workers retire, attracting, retaining, and building a strong pipeline of labour is paramount.

Looking ahead, it is estimated that about one in five job openings in Ontario will be in the skilled trades by 2026. More specifically, the construction sector will need to employ 72,000 new workers by 2027 to fill the positions of retired workers and new positions due to increased labour demand.[70] For the manufacturing sector, companies such as Volkswagen and LG are investing significantly in new electric vehicle (EV) battery manufacturing facilities in southwestern Ontario.[71] With growing EV sales and recent federal and provincial funding supporting these ventures, the addition of battery plants will create new jobs for Ontarians. Another example is a new Amazon warehouse that will bring additional job growth and economic benefits along with logistics work to Windsor, one of Ontario's manufacturing hubs. Job opportunities in entry-level and mid-management retail and hospitality roles will remain in high demand in the GTA until 2027.[72]

66 Pamela Heaven, "These three provinces are expected to feel the most pain as recession looms," Financial Post, January 23, 2023, https://financialpost.com/executive/executive-summary/recession-provinces-economic-outlook-rbc; David Ristovski, "There's a 70 Per Cent Probability of a Recession Next Year," Conference Board of Canada, October 18, 2022, https://www.conferenceboard.ca/insights/theres-a-70-per-cent-probability-of-a-recession-next-year/; Craig Wright, Robert Hogue, and Nathan Janzen, "Rate-hiking cycle ending as recession edges closer," RBC Economics, December 14, 2022, https://thoughtleadership.rbc.com/rate-hiking-cycle-ending-as-recession-edges-closer/; Iva Poshnjari, "Deloitte calls for a Canadian recession in 2023," BNN Bloomberg, January 17, 2023, https://www.bnnbloomberg.ca/deloitte-calls-for-a-canadian-recession-in-2023-1.1871200

67 Clair Parker, "The myth of the Canadian Great Resignation: Essentials for a tight labour market," January 23, 2023, https://www.national.ca/en/perspectives/detail/canadian-great-resignation-tight-labour-market/

68 BDC, "How to Adapt to the Labour Shortage Situation: Hiring Difficulties Are Not Going Away," September 2021, https://www.bdc.ca/en/about/analysis-research/labour-shortage

69 Government of Ontario, "Labour market report, January 2023," last updated, February 22, 2023, https://www.ontario.ca/page/labour-market-report-january-2023

70 "Ontario to allow Grade 11 students to enter full-time skilled trades apprenticeships," CBC News, March 8, 2023, https://www.cbc.ca/news/canada/toronto/grade-11-apprenticeship-programs-ontario-labour-1.6771809

71 Dave Waddell, "Volkswagen battery plant enhances Windsor position in EV space," Windsor Star, March 16, 2023, https://windsorstar.com/news/local-news/volkswagen-battery-plant-enhances-windsor-position-in-ev-space

72 Government of Ontario, "Explore Ontario's labour market by region," Ministry of Labour, Immigration, Training and Skills Development, 2022, https://www.services.labour.gov.on.ca/labourmarket/regions.xhtml?lang=en

While tight labour market conditions challenge Ontario's economy overall, it provides a wealth of opportunity for workers in this "job seekers market."[73] In July 2022, almost a quarter of Canadians made the decision to switch jobs.[74] However, recovery has not been entirely equitable. Underrepresented groups continue to have higher unemployment rates compared to workers from non-equity-seeking groups. Many affected populations may not be able to take advantage of favourable employment conditions due to persistent structural, systemic, and personal barriers.[75]

Implications of Essential Work and Essential Workers for Employment

The concept of *essential work* and *essential workers* has had a significant impact on employment experiences in Ontario during the pandemic. Despite low wages and risks to health and safety, many essential workers continued to work. Longstanding issues with job insecurity, low wages, and poor working conditions that many essential workers face were highlighted by focus group participants in this study and contrasted with the alleged importance of essential work and essential workers in society. This dichotomy presents a concerning disconnect between the value of the work and the treatment of workers in these essential roles.

Sectors that faced significant workforce reduction, or where work conditions became precarious as pandemic restrictions took hold, are now facing some reputational challenges among prospective job seekers. Numerous interviewees and focus group participants working across all affected sectors reported changing sectors or taking their careers in a new direction after experiencing essential work conditions or a pandemic-era layoff. As one interviewee from the manufacturing industry put it, "*[The pandemic] really showed what everybody's bottom line was.*"

Flexibility and Enhanced Benefits

With the pandemic accelerating remote work, a high proportion of Ontario's workforce was able to take advantage of remote-capable jobs and hybrid work settings.[76] The preference for flexibility resonates at the national level as well. A Canadian survey of over 6,000 people found that three in four remote-capable workers prioritize it.[77] Despite this preference, however, the same study finds that 52% to 63% of paid jobs in advanced economies such as Canada cannot be performed remotely.[78]

73 See section 3.2.
74 Olivia Bush, "Working From Home Statistics In Canada," Made in CA, February 24, 2023, https://madeinca.ca/working-from-home-canada-statistics/
75 Diversity Institute and the Environics Institute, "The shift to remote work: How workers in Canada are adapting to working from home," The Future Skills Centre at Toronto Metropolitan University, September 15, 2022, https://fsc-ccf.ca/wp-content/uploads/2022/09/The-shift-to-remote-work_How-workers-in-Canada-are-adapting-to-working-from-home.pdf, 27.
76 Ibid.
77 Ibid.

This is particularly true for work in the four affected sectors, which are often characterized by on-site and inflexible working conditions. As the demand for flexible work arrangements grows and worker preferences change, failing to offer flexibility creates a risk for organizations in hiring, employee engagement, performance and wellbeing, and talent retention.[78]

The Unequal Burden: Understanding the Most Affected Demographic Groups

Women, youth, newcomers to Canada, and underrepresented communities suffered disproportionate labour market impacts during the pandemic. The pandemic had notable and negative effects on young people in Canada as well, who experienced significant strains on their employment prospects, opportunities for higher education and training, and wellbeing.[79] An analysis by Statistics Canada found that Ontario had some of the highest numbers of youth who were not participating in employment, education, or training (NEET) during the pandemic.[80] The pandemic's effects on youth were especially severe for young people from racialized backgrounds.[81]

Affected sectors that employ relatively high proportions of women workers from other equity-seeking groups were the hardest hit by the pandemic (i.e., retail and hospitality, as explored in Section 1). In other words, women were overrepresented in sectors that were more likely to institute layoffs during the pandemic and were more likely to hold positions in frontline roles where they were more exposed to the COVID-19 virus. In September 2022, unemployment among racialized persons was 7.5%, which is higher in comparison to the unemployment rate of 5% for non-racialized persons.[82]

This was in addition to the inequities that permeate Canada's labour force, such as the gender-pay gap. According to OECD's 2022 data, there is a 16.1% difference between the annual median earnings of full-time working women relative to the annual median earnings of men.[83] Further compounding these challenges, a pre-pandemic study found that 60% of racialized persons in Canada are in the bottom half of the distribution of economic family incomes, compared to 47% of non-racialized families.[84] A 2021 report by the Canadian Centre for Policy Alternatives corroborates some of these disproportionate economic hardships, identifying that racialized groups suffered higher rates of unemployment during the height of the pandemic and a slower and less complete job recovery as the pandemic subsided.[85]

78 Ibid.

79 Environics Institute, the Diversity Institute, and Future Skills Centre, "Making up time: The impact of the pandemic on young adults in Canada," November 2021, https://www.torontomu.ca/diversity/reports/making-up-time/

80 Jaclyn Layton, "The impact of the COVID-19 pandemic on the proportion of youth not in employment, education or training: A regional analysis and international perspective," Statistics Canada, October 18, 2022, https://www150.statcan.gc.ca/n1/pub/81-599-x/81-599-x2022001-eng.htm, table 4.

81 Environics Institute, Diversity Institute, and Future Skills Centre, "Making up time: The impact of the pandemic on young adults in Canada."

82 StatsCan (from lit review, Statistics Canada, Table 14-10-0355-01)

83 Organisation for Economic Co-operation and Development, "Gender wage gap (indicator)," https://doi.org/10.1787/7cee77aa-en.

84 Sheila Block, Grace-Edward Galabuzi and Ricardo Tranjan, "Canada's Colour Coded Income Inequality," Canadian Centre for Policy Alternatives, December 2019, pg. 18.

85 Angele Alook, Sheila Block, and Grace-Edward Galabuzi, "A Disproportionate Burden: COVID-19 labour market impacts on Indigenous and racialized workers in Canada," Canadian Centre for Policy Alternatives, December 2021, https://policyalternatives.ca/publications/reports/disproportionate-burden, 21-26.

Finally, a 2022 study published by Statistics Canada found that the pandemic and associated lockdowns disproportionately affected the economic prospects of newcomers to Canada.[86] Those who entered Canada between 2019 and 2022 were unable to integrate into the Canadian economy as quickly, and women newcomers, in particular, suffered from slower job recoveries compared to male newcomers, and the Canadian population as a whole.[87,88] A significant challenge for employment growth among newcomers is a lack of what is commonly referred to as "Canadian experience."[89,90] This lack of Canadian-based work experience and education results in these groups often being relegated to low paying, precarious jobs.

The following section takes a closer look at the supply pipeline for Ontario's labour market, highlighting the barriers to employment and career progression experienced by equity-seeking groups. This study recognizes that people have multiple diverse and intersecting factors in their lives and do not have experiences in isolation. Further, a combination of various identities may increase the overall burden of inequality. In conducting research with equity-seeking groups, ICTC acknowledges the differences among and within such groups while reflecting on convergences and experiences that are felt collectively.

2.2 Employment Barriers and Considerations

The current labour market is characterized by pre-existing socioeconomic barriers, with equity-seeking groups such as women, newcomers, and underrepresented groups facing higher rates of unemployment and lower earnings.[91] A 2020 Canadian workforce survey finds that one-third of respondents belonging to equity-seeking groups reported facing negative effects on their careers due to their identities.[92] Barriers to training and employment can be systematic and will manifest themselves differently depending on an individual's life circumstances and career stage.[93] Focus group discussions noted that barriers to employment are often experienced in multiple and overlapping ways.[94] This idea of overlapping barriers speaks directly to the issue of intersectionality in understanding labour market outcomes experienced by affected communities.

86 Statistics Canada, "The COVID-19 pandemic disrupted the economic integration of many immigrants," December 5, 2022, https://www150.statcan.gc.ca/n1/daily-quotidien/221205/dq221205b-eng.htm

87 Diana Gerasimov, "COVID-19 IMPACTS on Employment Transitions by Immigrants," The Vanier Institute of the Family, March 16, 2021, https://vanierinstitute.ca/in-brief-covid-19-impacts-on-employment-transitions-by-immigrants/

88 Feng Hou, Garnett Picot, and Jue Zhang, "Transitions into and out of employment by immigrants during the COVID-19 lockdown and recovery," Statistics Canada, August 20, 2020, https://www150.statcan.gc.ca/n1/pub/45-28-0001/2020001/article/00070-eng.htm

89 Labour Market Information Council, "Settling Down: Recent Immigrants and Labour Market Information," LMI Insights Report, no. 19, November 2019, https://lmic-cimt.ca/publications-all/lmi-insight-report-no-19-settling-down-recent-immigrants-and-labour-market-information/#toc-5

90 Ilene Hyman and Michelle Goldberg, "Who is Succeeding in the Canadian Labour Market: Predictors of Career Success for Skilled Immigrants," World Education Services, 2019, https://files.eric.ed.gov/fulltext/ED602857.pdf, 18.

91 Sheila Block, Grace-Edward Galabuzi, and Ricardo Tranjan, "Canada's Colour Coded Income Inequality," Canadian Centre for Policy Alternatives, December 2019, https://policyalternatives.ca/sites/default/files/uploads/publications/National%20Office/2019/12/Canada%27s%20Colour%20Coded%20Income%20Inequality.pdf; Suzanne Spiteri, "What can the data tell us about Black Canadians and the labour market?," Labour Market Information Council, February 1, 2023, https://lmic-cimt.ca/part-3-what-can-the-data-tell-us-about-black-canadians-and-the-labour-market/

92 ADP Canada, "Canadians believe workplaces still have work to do when it comes to diversity and inclusion," 2021, https://www.adp.ca/-/media/adpca/redesign2019/pdf/q2-insights-dei.pdf?rev=60386eb69eb541648ba1b263940725af

93 Basia Pakula, and Heather Smith Fowler, "Barriers to employment and training for equity-seeking groups," May 2021, Social Research and Demonstration Corporation, https://www.srdc.org/media/553157/training-barriers-for-equity-seeking-groups-final-report.pdf

94 Many of the focus group participants ICTC spoke to self-identified as belonging to multiple demographic groups.

These barriers can be categorized into a few main structural challenges, according to focus group feedback. First, for those currently working in, or considering entering, one of the four affected sectors, career advancement opportunities are not always clear. Both workers and job seekers shared a concern about individuals from equity-seeking backgrounds becoming “stuck” in roles without the opportunity to advance into mid- and senior-level positions. This can weaken an organization's talent pipeline (i.e., fewer people applying) or cause “quick quits,” which impact an organization’s turnover and employee retention rates.[94]

Second, even once a career pathway is identified, existing financial pressures make it difficult for these groups to access the training and skill development programs often needed for career advancement—this was particularly prominent in the skilled trades. Training programs or certifications required for advancement are not always covered by the workplace. Employees can be required to pursue career training during their personal time, such as enrolling in weekend or evening classes or taking unpaid time off to attend the training during the workday.

Third, focus group participants highlighted the high cost of living proximate to work in Ontario. The Canada Mortgage and Housing Corporation reports a lack of affordable rental housing in the province, where less than 1% of available units were affordable for those with the lowest 20% of income.[95] The high cost of housing in many of Ontario’s towns and cities can make finding housing within a reasonable distance from jobs in the affected industries very challenging.[96]

Access to housing is crucial for people to be able to work. Focus group participants spoke about racialized individuals, Indigenous peoples, and newcomers often facing difficulty getting rental leases approved and evictions. In low-vacancy rental markets, such as the GTA, the practice of landlords carrying out “renovictions” further exacerbates housing precarity for renters.[97] While the Ontario Human Rights Commission has measures in place to ensure renters are not discriminated against based on race or ethnicity,[98] respondents spoke about how this ongoing practice affects their ability to search for meaningful employment.

Fourth, and related to the cost of living, low-income minorities often rely on public transit for day-to-day travel. Even in highly connected regions, such as the GTA, the difficulty or inability to access places of work by public transit was commonly mentioned by focus group participants.

94 As shared by an industry representative in an interview with ICTC.

95 In the data from 2022, the Canada Mortgage and Housing Corporation reported that less than 1% of available units in Ontario were affordable for those with the lowest 20% of incomes. See: The Canada Mortgage and Housing Corporation, “Rental Market Report – January 2023,” CMHC, January 2023, https://assets.cmhc-schl.gc.ca/sites/cmhc/professional/housing-markets-data-and-research/market-reports/rental-market-report/rental-market-report-2022-en.pdf?rev=ff8ebfd2-961f-4589-8ae2-fac01d1aedac

96 In its 2022 report, the Ontario Housing Affordability Task Force notes that the cost of housing in Ontario has grown faster than incomes across Ontario's cities, towns, and rural areas. The report notes that buying a home in Ontario is beyond the means of most first-time home buyers, while renting is also becoming increasingly unaffordable. See: Ontario Housing Affordability Task Force, “Report of the Ontario Housing Affordability Task Force,” Government of Ontario, February 8, 2022, https://www.ontario.ca/page/housing-affordability-task-force-report, 4.

97 City of Toronto, “Renoviction Policy - Creating a Framework to Protect Affordable and Mid-range Rental Homes and Deter Renovictions,” June 20, 2022, https://www.toronto.ca/legdocs/mmis/2022/ph/bgrd/backgroundfile-227757.pdf

98 Ontario Human Rights Commission, “Types of Rental Housing Discrimination,” accessed March 23, 2023, https://www.ohrc.on.ca/en/human-rights-and-rental-housing-ontario-background-paper/types-rental-housing-discrimination

The high price of transportation can also significantly erode a worker's daily earnings, further exacerbating the affordability challenge and adding personal and financial stress to those working in low-wage jobs.[99] As one focus group participant shared, "[People] have to finance cars and pay for insurance and pay for gas, and then they can't have any savings." A lack of savings places individuals in economically precarious positions if they lose their job or otherwise suffer a disruption to their income. One respondent working in construction shared their experience of being moved to a different job site inaccessible by public transit:

> *If you have a licence, that's a big thing. Access to a vehicle. If you don't have a lot of money, then it's difficult for you. And the subway opens at 6:00 a.m., and some of these jobs start at 6:00 a.m. So, unless you want to get on a night bus... And some of these jobs start at $18.00, so to get up at 3:30 a.m. and get on a night bus, it's not a big incentive.* – Focus Group Participant

According to experts interviewed in this study, the impact on mental health and the provision of adequate mental health support was challenging for affected communities. Cultural stigmas could often dissuade individuals from accessing programs, and like other parts of Ontario's healthcare and social services systems, wait times can be long for those seeking professional mental health services.[100] Focus group participants believed that some employers and older generations of workers do not have the same perspective on mental health, with one participant sharing, "I feel like they think we use it as an excuse, but it's not! It's real." Individuals experiencing mental health challenges may struggle to bring their full selves to work, seek out new opportunities, or suffer a job loss.

To increase employment and reduce barriers, better systems of support must be created, both within firms (internal) and industry-wide (external). Some supports that were suggested by interviewees include providing flexible work environments, recognizing foreign education and credentials, and supporting employee career goals (e.g., internal progression, upskilling, or training). However, as became clear through focus groups, people are not always aware of what barriers they may face, complicating the process of career progression.

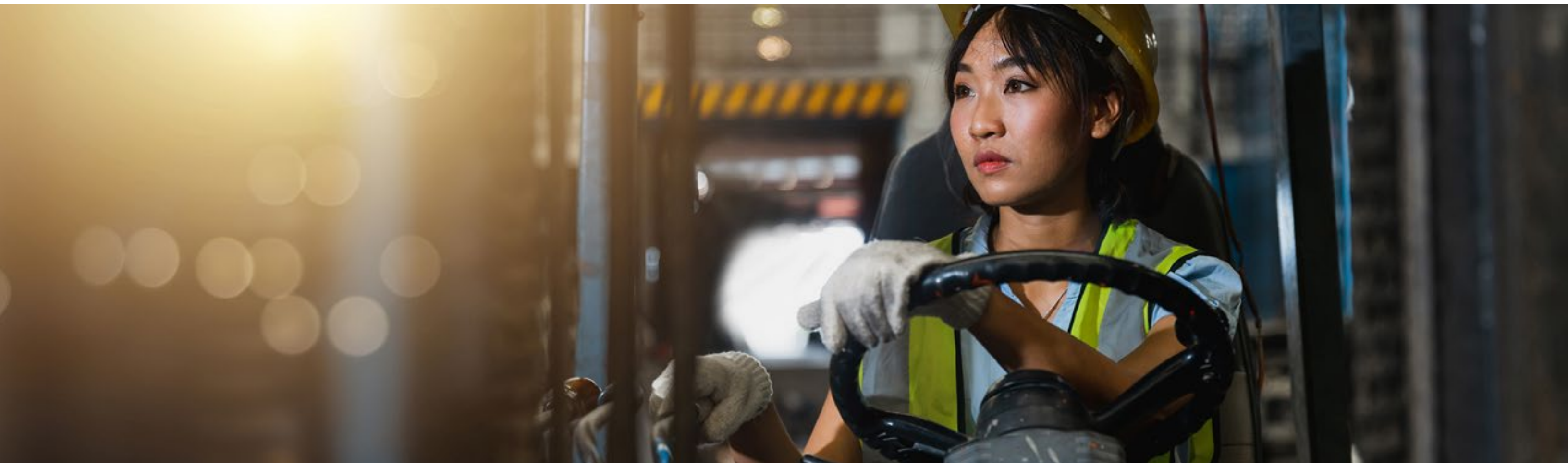
Programming that can help job seekers identify and then overcome barriers is valuable. As a representative from an Ontario community organization shared, "For new Canadians that don't have money, or youth who have been unemployed, those free programs that get them ready to go right into the job market are really amazing."

99 In a 2020 study, the Canadian Centre for Economic Analysis notes that in the GTA housing and transportation costs for those in the lowest income brackets can exceed over 50 percent of before-tax income. Housing and transportation costs are closely linked, as housing in outlying areas far away from employment centres are more affordable, but also necessitate longer commutes and increased transportation costs. See: Canadian Centre for Economic Analysis, "Transportation Pressures in the GTHA," February 2020, https://www.cancea.ca/wp-content/uploads/2022/11/Transportation-Pressures-in-the-GTHA-1.pdf, 20-22.

100 Nicholas Moroz, Isabella Moroz, and Monika Slovinec D'Angelo, "Mental health services in Canada: Barriers and cost-effective solutions to increase access," Healthcare Management Forum, vol. 33, no. 6 (2020): 282-287, https://journals.sagepub.com/doi/10.1177/0840470420933911

In addition to upskilling programs, one interviewee advocated for an approach that creates "wraparound supports" for underrepresented communities and other equity-seeking groups. This includes fostering relationships with community groups, developing community capacity, and engaging meaningfully with members of the local community.

For all the advancements and opportunities digital technology provides, an increasingly digital world also introduces barriers to employment for certain communities. Addressing the barriers discussed is crucial to addressing labour shortages and talent pipeline issues that could lead to labour gaps and loss of institutional knowledge. Improvements to attraction, hiring, and retention practices will help to ensure more diverse and inclusive workplaces, engaged and productive workforces, and economic prosperity in a tight labour market.



2.2.1 Women

Prior to the pandemic, women faced many longstanding barriers, including chronic undervaluation of women's labour, a higher propensity to work in precarious and low-paying jobs, and workplace discrimination. These barriers can each have unique impacts on women but were not exclusive to the experience of women during the pandemic.

From conversations with focus groups, industry experts, and others, the barrier with the greatest influence on women's ability to participate in the workforce is dependent care duties. The majority of women respondents in focus groups cited unpaid care (e.g., child minding and elder care) as the most significant barrier to employment and career growth. For many women, particularly those in low-paid, precarious employment, in frontline positions, or for newcomers who must maintain employment for work permits or other residency requirements, the impact of the pandemic meant choosing between work and looking after their families.[101] Women worldwide faced increased hours of unpaid care during the COVID-19 pandemic.[102]

101 Statistics Canada, "More than half of women provide care to children and care-dependent adults in Canada, 2022," November 8, 2022, https://www150.statcan.gc.ca/n1/daily-quotidien/221108/dq221108b-eng.htm

102 Kate Power, "The COVID-19 pandemic has increased the care burden of women and families," Sustainability: Science, Practice and Policy, vol. 16, no. 1, 2020, pg. 67-73, https://www.tandfonline.com/doi/full/10.1080/15487733.2020.1776561

Research by Oxfam found that nearly 50% of Canadian women experienced an increase in the time spent carrying out unpaid care during the pandemic.[103] Furthermore, Oxfam's research found that newcomer and minority women were more likely to experience increased hours of unpaid domestic care during the pandemic compared to domestic-born Canadian women.[104]

Childcare Challenges in Canada

Crises in childcare are experienced more acutely by single parents, families living in Northern, rural, and Indigenous communities, and families working non-standard hours, part-time, or precarious jobs.[105] Based on the most recent Time Use Survey, in 2015, women accounted for about 60% of hours spent on unpaid childcare and other household activities in Canada, and they spent an average of one more hour per day on childcare tasks than men.[106,107]

Single parents do not always have another caregiver to offload some of their caregiver responsibilities to, but even in dual-headed households or for women who work from home, these responsibilities of care often fall to the women. According to a June 2020 report by Statistics Canada, 42% of mothers served as the primary stay-at-home caretaker (versus only 8% of fathers), while 47% of mothers (versus 14% of fathers) stated that they were the primary parent helping their children with schooling and homework.[108] Within a few months of the spring 2020 lockdowns, women were 58% more likely than men to provide care.[109]

103 Oxfam International, "Care in the Time of Coronavirus: Why care work needs to be at the centre of a post-COVID-19 feminist future," June 2020, https://www.oxfam.ca/publication/care-in-the-time-of-coronavirus/ , 10.

104 Ibid., 14.

105 "Child care and the gender wage gap," Ontario Coalition for Better Child Care, June 2018, https://assets.nationbuilder.com/childcareon/pages/2522/attachments/original/1530124573/Child_care_and_the_gender_wage_gap_fact_sheet.pdf?1530124573

106 Wulong Gu, "The value of unpaid childcare and paid employment by gender: What are the impacts of the low-fee universal childcare program?," July 27, 2022, https://www150.statcan.gc.ca/n1/pub/36-28-0001/2022007/article/00003-eng.htm

107 Marilyn Gladu, "Women's unpaid work in Canada: Report of the Standing Committee on the Status of Women," House of Commons, 43rd Parliament, 2nd session, June 2021, https://publications.gc.ca/collections/collection_2021/parl/xc71-1/XC71-1-1-432-8-eng.pdf

108 Sylvia Fuller and Yue Quan, "Covid-19 and The Gender Gap in Employment Among Parents of Young Children in Canada," Gender & Society, 2021, https://doi.org/10.1177/08912432211001287

109 Statistics Canada, "More than half of women provide care to children and care-dependent adults in Canada, 2022," August 11, 2022, https://www150.statcan.gc.ca/n1/daily-quotidien/221108/dq221108b-eng.htm

Women focus group participants across sectors highlighted struggling with balancing work and childcare. For example, one single mom said, It's hard to find accommodating hours in jobs. It's stressful." As a result, many women attempted to pivot their careers during the pandemic, opting for more flexible work environments, and some left the workforce altogether. One interviewee representing a women's community organization service said, "If you don't have childcare, I think you're not going to have a workforce that can show up in person."

The challenge of finding accessible childcare is not limited to the pandemic, but closures of childcare facilities and schools exacerbated it. In an interview for this study, a community organization that serves women noted that the loss of "those [services] women relied on to help offload some of the unpaid care threw women under the bus." A pair of women focus group participants noted:

My career got put on hold because I had to take care of my mom.

I'm a mom and with kids doing online learning. It was hard to work remotely because I needed to multitask. All I had time for was to sleep and cook. I had to supervise the kids.

For an equitable post-pandemic recovery, childcare supports are key to reducing this barrier for women. The Government of Canada is working toward a more affordable childcare program. Current goals focus on bringing childcare down to $10.00 a day on average by 2026. Examination of Quebec's affordable daycare policy shows that access to affordable childcare has "been positive for maternal employment, family incomes, the support of families and the reduction of poverty."[110,111]

2.2.2 Youth

A steady pipeline of youth is an important way to ensure a robust supply of talent that will provide the necessary support to affected sectors in the future. As youth work to discover and build networks, lack of early exposure to career options and clarity on pathways is a significant barrier that was commonly referred to by young people who participated in focus groups and in one-on-one interviews as part of this study.[112] Research conducted in the United States finds that building social capital between young people, peers, and near-peer groups can also positively impact education and employment outcomes.[113]

110 Gordon Cleveland, Sophie Mathieu, and Christa Japel, "What is the 'Quebec model' of early learning and child care?" Policy Options, February 18, 2021, https://policyoptions.irpp.org/magazines/february-2021/what-is-the-quebec-model-of-early-learning-and-child-care/

111 Pierre Lefebvre and Philip Merrigan, "Child-Care Policy and the Labor Supply of Mothers with Youth Children: A Natural Experiment from Canada," Journal of Labor Economics, https://doi.org/10.1086/587760

112 Literature on the matter suggests that having such career information available can greatly benefit young people as they transition from education to the workforce. See: Krista Benes, Donnalee Bell, and Dave Redekopp, "Improving the School-to-Work Transitions: A Scoping Review," The Canadian Career Development Foundation, 2016, https://ccdf.ca/wp-content/uploads/2016/09/Literature-Scan_FINAL1.pdf

113 Ashley Boat, Jenna Sethi, Clare Eisenberg, and Rachel Chamberlain, "'It Was a Support Network System that Made Me Believe in Myself:' Understanding Youth and Young Adults' Experiences of Social Capital in Six Innovative Programs," Search Institute and the Bill and Melinda Gates Foundation, 2020, https://www.search-institute.org/wp-content/uploads/2020/12/SOCAP_Deliverable_121720.pdf

Young people graduating from high school or post-secondary and striving to launch careers during the time of the pandemic at times missed out on opportunities for summer jobs, internships, mentorships and networking.[114] For young people in Ontario, navigating an ever-shifting job market became more challenging. The impact of the pandemic meant that traditional pathways of exploring work opportunities through school were no longer available, and services designed to bridge this gap were no longer being effectively utilized.

Youth numbers accessing [employment] services actually decreased. And I think this was common, [from] talking to the other service providers and our service system managers. It was very disheartening to see that people have given up on accessing [employment] services. That means that they don't believe there is a job out there for them or that there's any reason to look. – Community Organization Representative (Youth)

To overcome the challenge of information gaps, one interviewee mentioned that their company regularly makes use of government programs to help them hire high school students for co-op positions, including young women and individuals from the LGBTQ2S+ community. Interviewees reported that "empowered youth can make empowered decisions about their careers," and developmental opportunities such as internship or co-op positions are essential for the career growth of young workers completing their education and entering the workforce. Effective pipeline development requires industry and employment organizations to work closely with school boards and local communities to identify pathways and educate youth of all backgrounds on the viability of these sectors providing long-term, high-quality careers.

Once the information gap is closed, other considerations like soft skills and mental health become important. There has been a significant shift in skill demand that places greater emphasis on "soft skills" (i.e., problem solving, communication, interpersonal skills, critical thinking, etc.). Many young people rely on entry-level jobs in the hospitality and retail sector to gain necessary experience and soft skills. As seen in Section 1, youth make up 30% of the retail workforce and 43% of the workforce in hospitality. Additionally, mental health challenges continue to mount, and many focus group participants cited it as a personal barrier to employment and career progression. Employment services professionals have noticed youth with "gaps" in their employment since the beginning of COVID-19, and some note that their inability to find a job causes feelings of depression. The uncertainty brought on by lockdowns and interruptions to education and work had a significant impact on youth:

Not believing in yourself and your abilities is a common yet unfortunate personal barrier to career progression. A lack of self-confidence and self-esteem can cause you to miss out on new opportunities and advancements in your career. – Focus Group Participant

114 Jared Lindzon, "Coronavirus derails summer work plans for Canadian students," The Globe and Mail, April 9, 2020, https://www.theglobeandmail.com/business/careers/article-coronavirus-derails-summer-work-plans-for-canadian-students/

2.2.3 Newcomers

When they come from abroad [through] the immigration process, they see Canada as like a haven, a land of opportunities, and all these things. Then they get here, and they realize what the roadblocks are ahead of them. And they spend two to three years trying to accredit their degrees, trying to find work and not be underemployed... – Community Organization Representative (Newcomer communities)

As highlighted in interviews with employment services professionals, newcomers to Canada face several barriers to employment, including lack of Canadian work experience, language proficiency challenges, cultural differences, and detrimental loss of traditional networks through the pandemic. Even with the overreliance on what is often referred to as "survival jobs," many newcomers discussed their struggles in finding any work at all. Core challenges included lack of experience, processing delays for documents, and discriminatory hiring practices. To this point, recent research from the Diversity Institute found that job applicants with "foreign-sounding names" are 20% to 40% less likely to get a call back for a job interview.[115]

As mentioned, a major obstacle to employment growth for newcomers is the active or passive requirement for Canadian experience. This requirement often relegates newcomers to low-paying, precarious jobs, many of which were not available during the pandemic. Requiring candidates to have Canadian experience or credentials is a discriminatory practice that prevents meaningful economic contributions by skilled immigrants in the workforce. In addition, newcomers across all focus groups noted facing additional barriers related to their foreign education, credentials, and work experience questioned or not recognized. As shared by one focus group participant, "[I am] happy to have [my work permit], but companies don't know the name of my university or the companies [I've worked at] and don't trust me." Other focus group participants shared similar sentiments:

When you come here...you have to prove yourself all over again.

We don't lose our skills by coming to Canada.

As a nebulous term, "Canadian experience" often refers to the combination of experience demonstrating relevant technical skills and an understanding of Canadian workplace culture.[116] Even when securing jobs, newcomers may face additional challenges integrating into the workplace.

115 Eddy S. Ng and Suzanne Gagnon, "Employment gaps and underemployment for racialized groups and immigrants in Canada: Current findings and future directions," Diversity Institute and the Future Skills Centre, January 2020, https://fsc-ccf.ca/wp-content/uploads/2020/01/EmploymentGaps-Immigrants-PPF-JAN2020-EN.pdf

116 Izumi Sakamoto, Matthew Chin, and Melina Young, "'Canadian Experience,' Employment Challenges, and Skilled Immigrants: A Close Look Through 'Tacit Knowledge,'" Canadian Social Work 12, no.1 (2010): 145-151, https://tspace.library.utoronto.ca/bitstream/1807/94782/1/Canadian%20Experience%20employement%20challenges_Sakamoto.pdf

Although support networks and organizations can help newcomers navigate this challenge, many such services were unavailable to operate or halted their services during the pandemic, increasing newcomer feelings of isolation. As stated by focus group participants:

> *Knowing someone within an organization that can help move your file along, even if you don't have Canadian experience really, really helps.*

> *It's hard to find references for a job application if you've only been here a few years. This is especially tough if you're new to Canada. And it's hard to find opportunities without references.*

Aside from employment services, support sought by newcomers generally relates to affordable housing, transportation, and living wages. Housing for newcomers to Canada—during and post-pandemic—is an issue that stands in the way of obtaining gainful employment. For those who relied on community housing during the pandemic, there was a shortage of affordable, safe housing or shelters. Focus group participants spoke about how the violence against women in housing shelters increased, forcing women with children to flee. In addition, a case of COVID-19 in community housing meant that the building would be put into lockdown, creating conditions of forced isolation and missed work. A focus group participant from Toronto spoke to this issue:

> *As a newcomer living in community housing, every time someone had COVID, there would be a forced shutdown, so [I would] not [be] able to go to work. This happened consecutively three times in one month, about four to seven days isolation each time...it upset my employer.*

Respondents also spoke about how low-income individuals also face discrimination from employers based on where they live, referred to in focus groups as "area code discrimination." When speaking to their career advancement opportunities, a focus group participant shared their experience: "I've seen discrimination based on area codes. Discrimination impacted me moving up." They added that they would like to see "better integration via class," where individuals are not categorized by their postal code. Additionally, having an address is often a requirement for job applications or in hiring processes. Without a permanent address, it becomes much harder to get a job.

Language proficiency is a significant barrier to employment for new immigrants, as it may affect their ability to communicate effectively with coworkers, understand instructions, and express their ideas. In addition, many Canadian employers require proof of language proficiency as part of the hiring process.

However, as heard in interviews with employers, while a newcomer may have a good English language score and good written English, conversational English abilities are key to customer-facing roles. Focus group participants highlighted the following:

> *I have no confidence speaking English. With the hiring freeze, [it was hard for me] because I have no connections or existing network.*

> *English was not [my mom's] first language, and I saw her struggle in trying to look for a job. I feel like a lot of individuals assess your ability according to the way you speak.*

The Institute for Canadian Citizenship speaks to a "crisis of confidence" among Canada's immigrant population,[117] referencing March 2022 data that shows 30% of newcomers aged 18 to 34 could leave Canada in the next couple of years.[118] Younger, highly skilled immigrants are "starting to fall between the cracks," and new immigrants to Canada are more likely to believe that Canadians do not understand the challenges that immigrants face.[119] Newcomers have many conditions they need to meet in order to enter the workforce in Ontario and face higher levels of scrutiny by employers when seeking jobs; if newcomers are not integrated fully into Canadian society, they may leave the province or country.

> *About 60% of the Arab population in Canada are under the age of 34. And they are mostly young people that want a job, they want to work, they want to get an education. They want to be recognized for their contributions to Canadian society. But they just feel like either because of their accents, because of their language barriers, or because of the fact that they don't have Canadian experience, they are automatically excluded from participation in full Canadian society.* – Community Organization Representative (Underrepresented groups)

> *When we're talking about integration, we don't want immigrants to feel like it's over for them, that they're just going to be doing survival jobs for the rest of their lives. No, they should still feel like they can develop their career somehow.* – Community Organization Representative (Newcomer populations)

117 From 2001 to 2021, the number of newcomers obtaining Canadian citizenship has dropped to 45% from 75%: "Institute for Canadian Citizenship, Newcomers falling out of love with Canadian citizenship," February 15, 2023, https://inclusion.ca/article/newcomers-falling-out-of-love-with-canadian-citizenship/

118 Institute for Canadian Citizenship, "Immigrants to Canada Facing a Crisis of Confidence," March 2022, http://inclusion.ca/wp-content/uploads/2022/05/Leger_ICC_Citizenship-Report-March-2022.pdf

119 Ibid.

The Effects of the Pandemic on Arab-Canadians and Newcomers

People of Arabic identity are one of the largest ethnocultural groups in Canada. While it is important to remember that not all newcomers and racialized groups face the same issues, the experiences of those who identify as Arabic can shed light on some of the challenges newcomers must overcome, more generally. The Canadian Arab Institute (CAI) published a number of reports on the experience and issues facing Arab-Canadians and newcomers as they look to participate in the Canadian labour market. Together, these studies paint a picture of the barriers Arab-Canadians must navigate as they strive to build economic futures in Canada. According to the Canadian Arab Institute's research, these barriers were exacerbated by the COVID-19 pandemic.

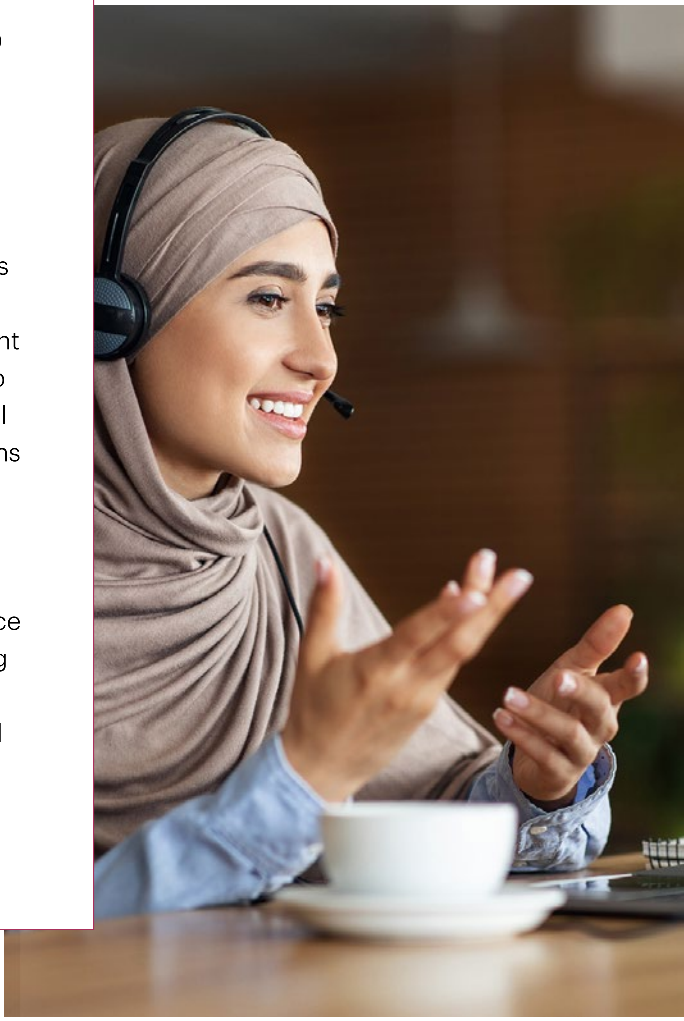
The CAI's 2021 study on the experiences of Arabs and other visible minority communities during the COVID-19 pandemic found that Arab and other racialized groups in Canada experienced challenging circumstances. Arab-Canadians and other racialized communities endured negative effects on their physical, financial, spiritual, emotional, and social wellbeing.

Furthermore, Arab-Canadians reported job loss, reduced hours, and corresponding losses of income. Yet, only one-third of Arab respondents and less than 30% of respondents from other racialized groups accessed government financial relief programs during the pandemic. The COVID-19 pandemic and its associated economic and social disruptions created significant barriers for Arab-Canadians to finding meaningful employment opportunities and prosperity in Canada.

Arab-Canadian women also faced discrimination and significant employment barriers in Canada's contemporary labour market. According to a 2022 study by the CAI, "Arab-Canadian women are the least employed group of eligible workers in Canada."[120] The study finds that barriers keeping Arab women from fully participating in the Canadian labour market include "inadequate employment services, identity, foreign credentials, Canadian experience, and language and communication obstacles."[121] The study explores how these barriers mirror those faced by non-Arab racialized women in Canada.[122]

Arab-Canadian youth also face employment barriers. In a 2019 report on Arab youth workforce integration, the CAI noted that "institutionalized racial discrimination is deeply rooted in the labour market," and it remains persistent despite the efforts of governments and employers to address such issues.[123] The report finds that despite having comparable education and qualifications, Arab youth experienced poorer career outcomes in Canada compared to their peers.[124] Arab youth in Canada struggle to obtain the same degree of professional development when compared to other young workers. Furthermore, Arab job seekers often face a dilemma between expressing their cultural identities as Arab-Canadians and meeting employer expectations and workplace norms.[125]

The Canadian Arab Institute suggests that the development of formalized mentorship and networking programs can be effective ways to help Arab youth enter the Canadian workforce and enhance their professional development.[126] Corresponding research by the University of Calgary's School of Public Policy finds that initiatives such as career coaching, mentorship, and developing "career success plans" can improve newcomers' participation in the Canadian labour market and that these programs are associated with significantly higher incomes.[127]



120 Canadian Arab Institute, "Employment Barriers Facing Arab Women in Canada," April 2022, https://www.canadianarabinstitute.org/employmentbarriers, 16.

121 Ibid., 10.

122 Ibid., 10.

123 Aisha Shibli, "Discrimination in the Workplace: A Stumbling Block Toward Professional Development for Arab Youth in the Canadian Labour Market," September 2019, Canadian Arab Institute, https://static1.squarespace.com/static/5e09162ecf041b5662cf6fc4/t/5e7cda6e678813093fc50022/1585240686622/Professional+Development.pdf, 2.

124 Ibid., 5.

125 Ibid., 5-6.

126 Ibid., 11.

127 Robert Falconer, "Social Policy Trends: Career Success Plans for Immigrants," School of Public Policy, University of Calgary, June 2022, https://www.policyschool.ca/wp-content/uploads/2022/06/A-HSP-84ImmigrantMentorship.pdf

2.2.4 Underrepresented Groups

Underrepresented groups face systemic issues such as discrimination and biases, poverty, lower access to education, and inadequate job training opportunities, which contribute to employment barriers, limited job prospects, and career advancement challenges.

Following the Black Lives Matter movement in June 2020, applicants saw more spots in businesses for diversity, and companies were eager to highlight new diversity targets. However, many focus group participants felt that diversity targets are not actually a good system or that these spots were not actually available. Participants spoke of poor hiring practices like tokenism and suggested that "diversity hires" may actually act as a barrier:

Usually there is one spot to hire a Black person for diversity legal purposes and maybe one spot to hire a woman for gender equality... So let's see, one spot for a Black man and one spot for a white woman—what about me as a Black woman?

There's been a lot of organizations that have wanted to commit themselves to more of a diverse applicant portal. And obviously, it's kind of like a win for the Black community that we are finally having spaces curated for us like there are literally companies that want to have more diversity. But at the same time, it causes this fear of tokenism or diversity hires and still not feeling valuable in your workspace.

A lack of diversity and inclusion in a workplace can create a hostile or unwelcoming work environment for racialized persons.[128] Diverse representation in leadership and decision-making roles is required in order to help racialized peoples find gainful employment and improve opportunities for meaningful career progression.[129] Most importantly, experts advised that diversity, inclusion, and equity is more than just a statement at the end of a job posting.

What resources do you have in your organization that ensure that once we are welcomed into the space, we feel that we can go through upward mobility? That we do feel like our voices are heard? That we are not tokenized and our skills can be used and we can be challenged? – Focus Group Participant

Focus group participants spoke about career progression barriers caused by mental health and the challenges it creates when left unchecked. Cultural norms among newcomers and racialized groups may compound this barrier.

128 ADP Canada, "Canadians believe workplaces still have work to do when it comes to diversity and inclusion," 2021, https://www.adp.ca/-/media/adpca/redesign2019/pdf/q2-insights-dei.pdf?rev=60386eb69eb541648ba1b263940725af

129 Zhong and Shetty, "Diversity, Equity and Inclusion in Responsive Career Pathways."

One interviewee shared that "not only is it a personal thing that they have mental health issues, but they can't talk about them because it's not accepted by their community or it's not something that's done... You just don't talk about it, you don't go ask for help."

A barrier affecting low-income individuals, many of whom identify as racialized, is access to technology and internet at home.[130] For example, many Indigenous peoples do not have easy access to the internet, which challenges their ability to access external resources like educational, employment and health services.[131] Reliance on public spaces prior to the pandemic had a significant impact on the lives of low-income communities during the pandemic. Without reliable access to the internet, these groups were unable to stay connected to the labour market (e.g., for job applications) or build the skills needed to re-enter the workplace. Many people used the pandemic as an opportunity to upskill and invest in personal development, but some low-income minorities experienced further marginalization.

Experts interviewed in this study note that it is imperative that employers "engage with [the people] where they are." Canadian Indigenous charity Indspire identifies how a lack of understanding among employers and policies limits opportunities for Indigenous peoples.[132] While digital platforms are valuable, it is necessary to engage with Indigenous communities through more traditional means and create barrier-free pathways to employment. One expert suggested job fairs hosted in Indigenous communities, employer participation in community events, or sitting in community circles to learn about Indigenous peoples' experiences. Employers must collaborate with communities to effectively create meaningful work opportunities that support community development and self-determination.

The multitude of barriers explored above that affects equity-seeking groups have real and tangible impacts on the lives and careers of youth, women, newcomers, and underrepresented communities. To ensure programs address the unique perspectives and needs of equity-seeking groups, interventions to support these groups must internalize lived experiences and prioritize equity-driven solutions and wraparound supports.[133] More generally, you have to design systems with these barriers in mind. As one expert said, "You just have to clear the pathway for people."

130 Sam Andrey, M.J. Masoodi, Nisa Malli, Selasi Dorkenoo, "Mapping Toronto's Digital Divide," Ryerson Leadership Lab and The Brookfield Institute for Innovation + Entrepreneurship, January 2021, https://www.toronto.ca/wp-content/uploads/2021/07/95dc-Mapping-Torontos-Digital-Divide.pdf

131 Angela Mashford-Pringle et al., "What we heard: Indigenous Peoples and COVID-19: Public Health Agency of Canada's companion report," Public Health Agency of Canada, March 3, 2023, https://www.canada.ca/content/dam/phac-aspc/documents/corporate/publications/chief-public-health-officer-reports-state-public-health-canada/from-risk-resilience-equity-approach-covid-19/indigenous-peoples-covid-19-report/cpho-wwh-report-en.pdf

132 Shawna D'Antimo, "Navigating Two Worlds: Paths to Indigenous Career Success," 2021, https://indspire.ca/wp-content/uploads/2021/11/Navigating-Two-Worlds-Report-EN-Final-WEB.pdf, 6.

133 Zhong and Shetty, "Diversity, Equity and Inclusion in Responsive Career Pathways."

2.3 Worker Profiles: Understanding Supply

The challenge of attracting talent into the affected sectors is a multifaceted problem. In many ways, the labour gap in affected sectors should be understood as a departure to other sectors that are perceived as safer, more predictable, and offering greater flexibility. It's not that workers are leaving the workforce altogether, but for the evolution of the affected sectors to be successful, ensuring a steady pipeline of talent is a must.

Job switching and career pivots are a defining factor of the post-pandemic workforce.[134] However, focus groups uncovered that women, youth, newcomers, and underrepresented groups feel they struggle to break out of survival jobs to move into better opportunities and long-term careers. One interviewee shared how "a lot of these survival jobs are going to naturally be in retail, manufacturing, and the service industry." Many individuals, particularly newcomers to Canada, find themselves stuck in these survival jobs; they have children to feed, bills to pay, and other financial responsibilities that need to be met. For those that do enter these sectors with the goal of building a long-term career, the pathways for progression are not always clear.

These workforce challenges are not new to the manufacturing, construction, retail, and hospitality sectors. Instead, the pandemic exacerbated and illuminated pre-existing systemic employment issues and barriers across the economy. Further, affected populations have well-ingrained beliefs about the affected sectors. These beliefs appear to be long-standing and have been exacerbated by the pandemic. Table 1 provides the results from a word-association exercise that was conducted with focus group participants from affected communities across the province.

Table 1: **Results from focus group word-association exercises**

Manufacturing		
NEGATIVE ASSOCIATIONS	**NEUTRAL**	**POSITIVE ASSOCIATIONS**
Long hours	Factories	Rewarding
Quotas	Line work	Well paid
Labour intensive		Specialized
Dangerous		Talented
Sexism		Detail oriented
Repetitive		High-quality
Shrinking field		Technical skills
Wage gaps		Innovative
Underappreciated		Hard working

134 Caroline Castrillon, "Why Millions of Employees Plan to Switch Jobs Post-Pandemic," Forbes, https://www.forbes.com/sites/carolinecastrillon/2021/05/16/why-millions-of-employees-plan-to-switch-jobs-post-covid/?sh=61a9ef511e7e

Construction

Physically tough/labour intensive	Hard work	Productive
Brutal weather	Machinery	Well paying
Long hours	Early mornings	Unionized
Unforgiving	Essential work	Entrepreneurial
Dangerous	Trade school	Skilled / specialized
Uneducated	Not requiring post-secondary	Dynamic
Sexism / Misogyny	Outside	
Unfair job distribution		
Wage gaps		
Prejudice		
Nepotism		

Retail

Starter job / temporary	Customer service	Adaptive
Small opportunities for growth	Multitasking	Teamwork
Minimum wage	Food, merchandise, sales, wholesale (variety)	Commission / tips
Stressful	Female dominated	Fast-paced
Lack of work-life balance		
Difficult customers		
Stereotypes		
Underappreciated		

Hospitality

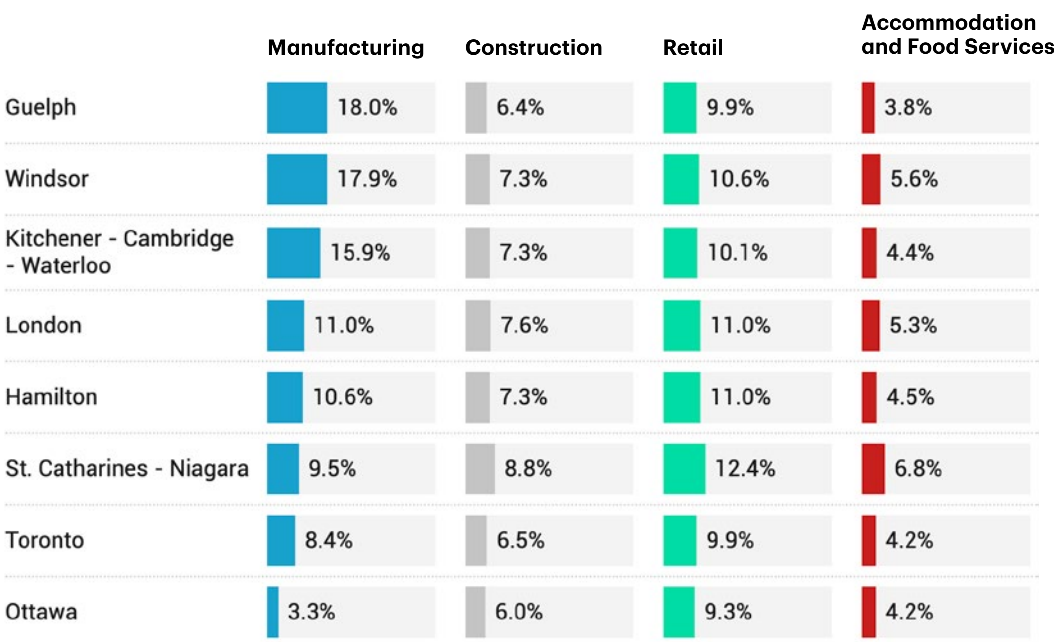
Emotionally demanding	Customer service	High tips
Physically demanding	First job	Fun
Inappropriate customers	High expectations	Sociable
Underpaid / lower base wage	Good communication needed	Networking
Relying on tips	Memory skills	Fast-paced
Long hours		Self-expression / passion
Unhealthy lifestyle		
Stressful		
Underappreciated		

Regional Concentrations

There is some variation in the proportion of residents employed in the affected sectors, but overall, the values do not change much except in a few regions, and for the manufacturing industry. For example, the St. Catharines–Niagara region employs proportionately more talent in the hospitality sector, likely because of the region's high economic dependency on tourism.[135] The St. Catharines–Niagara region also exhibits proportionately higher levels of employment in retail and construction.

With the exception of manufacturing, employment rates in key sectors are relatively similar across major census metropolitan areas

Percentage of residents working in key affected sectors



Note: X-axis takes on the values of 0-50, inclusive.

Figure 2.a, Affected Population Employment Concentration by Census Metropolitan Area. Source: Statistics Canada: 2021 Census

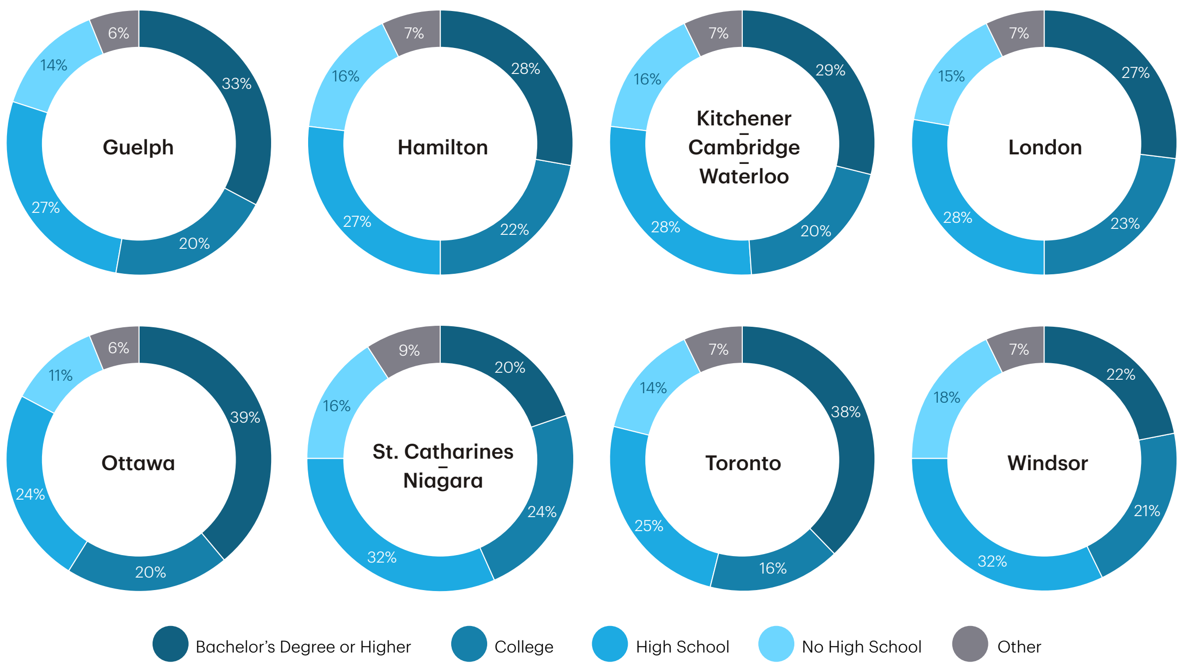
For manufacturing, there is a large variation in the proportion of workers employed across Ontario's CMAs. In Guelph and Windsor, manufacturing employs close to one in five workers. Whereas in Toronto, St. Catharines, and Hamilton, that number is closer to one in 10. This high variation should inform decisions about how to support industry growth and how best to attract new labour to the industry.

135 Ray Spiteri, "Tourism: Many Niagara Falls residents have grievances about their city's No.1 industry," Toronto Star, https://www.thestar.com/nd/news/niagara-region/2022/11/25/tourism-niagara-falls-residents-air-grievances-about-their-citys-no-1-industry.html

From an education perspective, the percentage of the population with university degrees can vary quite substantially from region to region. Regions like St. Catharines and Windsor have proportionately low levels of university graduates and high levels of high school graduates, whereas for Toronto and Ottawa, that relationship is reversed. The rest of the CMAs fall somewhere in between those two extremes.

High school and university levels can vary quite substantially by census metropolitan area

Higher education certificate obtained by CMA, 2021



Other includes: Trades diplomas and certificates, apprenticeship certificates, non-bachelor university certificates

Figure 2.b., Education Levels across Census Metropolitan Areas. Source: Statistics Canada: 2021 Census

Discussions with industry experts identified that for those pursuing careers in the sectors, work often precedes school. Many pathways to careers are discovered through on-the-job experiences and discovering a passion, and then returning to school to obtain the necessary skills, credentials, or certifications. Education is not necessarily a requirement for entry into manufacturing, construction, retail, or hospitality but can be an outcome of entering the sectors.

2.2.2 Profile: Manufacturing in Ontario

Occupations

Occupations in the manufacturing sector are concentrated around the manufacturing process and the trades, transportation, and equipment operators needed to support manufacturing operations. Outside of technical occupations, the sector has a need for individuals with business expertise and scientific and engineering backgrounds. Finally, the sector also employs individuals whose roles focuses on sales and service.

In the manufacturing sector, most people are employed in occupations in manufacturing and utilities

Percentage of labour force employed in manufacturing across occupational categories

	Guelph	Hamilton	Kitchener – Cambridge – Waterloo	London	Ottawa	St. Catharines – Niagara	Toronto	Windsor
Legislative and senior management occupations	1.5%	1.7%	1.1%	0.9%	2.4%	1.3%	1.9%	1.1%
Business, finance and administration occupations	11.0%	13.5%	11.1%	11.1%	14.2%	12.7%	15.5%	10.4%
Natural and applied sciences and related occupations	11.2%	13.4%	12.7%	11.6%	29.2%	8.9%	14.0%	16.4%
Health occupations	0.2%	0.6%	0.4%	0.2%	1.5%	0.3%	0.7%	0.3%
Occupations in education, law and social, community and government services	0.6%	0.6%	0.5%	0.5%	1.7%	0.3%	0.8%	0.4%
Occupations in art, culture, recreation and sport	0.8%	1.1%	0.7%	1.2%	3.1%	1.2%	1.5%	1.1%
Sales and service occupations	6.2%	9.1%	6.9%	7.5%	10.4%	8.0%	9.7%	4.7%
Trades, transport and equipment operators and related occupations	20.0%	21.8%	20.0%	21.8%	14.1%	26.4%	16.4%	26.2%
Natural resources, agriculture and related production occupations	0.4%	0.3%	0.4%	0.3%	0.3%	0.8%	0.2%	0.3%
Occupations in manufacturing and utilities	48.2%	38.0%	46.2%	44.7%	23.2%	40.2%	39.4%	39.1%

Employment evaluated at the 2-digit NAICS level: Manufacturing [31-33]

Figure 2.c, Occupation Concentration in Manufacturing across Census Metropolitan Areas. Source: Statistics Canada: 2021 Census

Sector Transformation

At the same time, the character of manufacturing is changing. Manufacturing employers interviewed in this study identified several “niches” in which they can play an active role in Ontario: renewable energy and the deployment of Industry 4.0 technologies and processes were viewed as avenues for economic growth and talent attraction. In fact, some employers said that growing digital adoption in the sector would enable it to compete for high-skilled technical talent even with the technology sector.

Business model changes undertaken during the pandemic also signal a shift. Several manufacturing employers participating in this study’s interviews noted constantly seeking and testing new technologies to increase output and maximize efficiencies; for many, this became critical to survival during the pandemic. Aside from broad economic disruption, supply chain shortages and bottlenecks caused many industry leaders to re-evaluate existing processes and dependencies and even look to technology to fill gaps. ICTC’s employer survey corroborates this trend: nearly half of surveyed manufacturing employers plan to make further technological investments, and more than one-third intend to develop new service offerings in the near future. The introduction of new technologies and service offerings also creates a need for retraining or upskilling existing talent that have valuable domain skills. For example, manufacturers are increasingly adopting lean business practices to reduce or repurpose waste.[145]

What significant changes do you plan to make to your business in the next 1–2 years MANUFACTURING

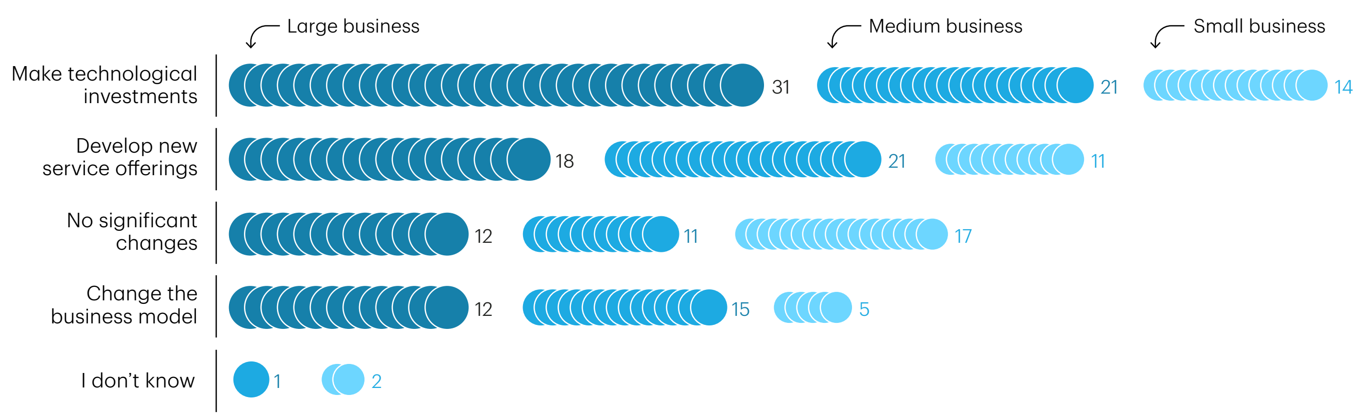


Figure 2,d: Employer Survey - What significant changes do you plan to make to your business in the next 1 to 2 years? (Manufacturing), Source: ICTC, n=142.

Education

The manufacturing sector requires a wide range of educational backgrounds to support the types of occupations noted above. Education is not always necessary for skill-based roles related to trades, transportation, and manufacturing. However, post-secondary education and specialized knowledge play a part in developing talent for the scientific and business-oriented positions in the sector.

The Ontario public education system has a crucial role to play in preparing individuals for a career in manufacturing. Educators, parents, and industry leaders recognize the importance of vocational education, but some industry experts interviewed in this study believe that in the past, clearer pathways to the sector were provided to students, and this type of high school and post-secondary education has waned.

While the education system, especially at the post-secondary level, is responsible for providing new entrants into the workforce with in-demand technical skills associated with their chosen pathways, soft skills are just as critical. Nearly 54% of manufacturing employers surveyed believe that "general communication" is a required skill for manufacturing roles, and another 44% see it as very or somewhat important. Almost half (48.1%) believe that "time management" is also required, and another 51% state that it is very or somewhat important. In fact, of the seven top-ranked skills in manufacturing-associated jobs, five can be classified as soft skills (i.e., generalized skills that are not technical or specialized in nature).

Required and Important Skills MANUFACTURING

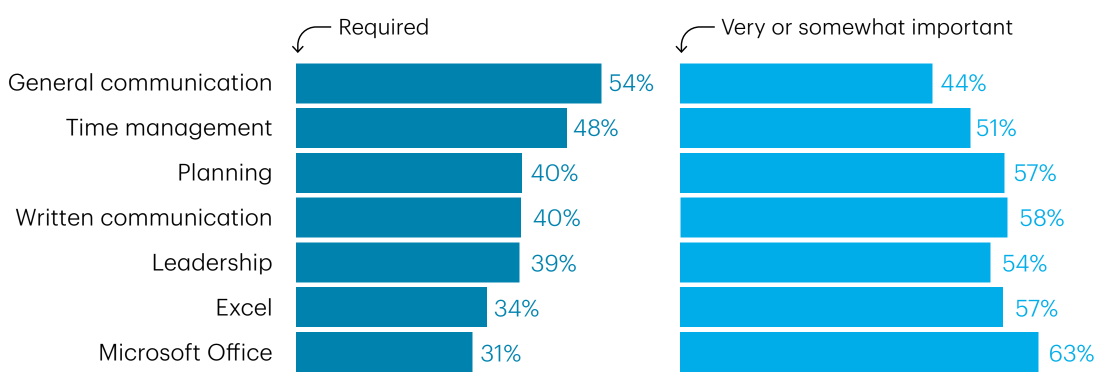


Figure 2, e.: Top skill requirements among manufacturing roles, Source: ICTC.

Employment Barriers

During the focus groups, participants raised concerns about the perception of manufacturing work. Perceptions toward manufacturing included “labour intensive,” “male dominated,” “dangerous,” and largely associated with factory and line work. However, related to clarity on employment pathways and opportunities, many industry interviewees believe that workers are not always aware that they can earn significant wages in the manufacturing sector; awareness of potential earnings can help offset stigmas. Moreover, different perceived values placed on white-collar versus blue-collar careers increasingly introduce barriers for manufacturing and the affected sectors more broadly. As noted by one employer interviewed in this study:

Through no one's fault, we lost almost an entire generation of potential skilled labour. And why I say that is because—and I'm guilty of it as being a parent myself—as my kids were growing up, I encouraged them to go to university and to get their education.... By pushing kids in one direction, we totally neglected the skill set that’s needed to go into the manufacturing world. – Industry Expert (Manufacturing)

Moving Manufacturing Forward

With a wide variety of high-quality occupations available in the sector, there are significant opportunities in Ontario’s manufacturing sector. Industry experts spoke of how anyone with a strong work ethic can have a prosperous career in manufacturing and believed that it allows young workers to try different things and find a specialty they are interested in. For example, in an interview, one employer was excited to share that they often hire young people into entry-level positions and then move them through the company’s manufacturing operations to help them develop a passion and specialization. At this early stage, students can be better introduced to the work by trying it. As one interviewee noted: “It's one thing to look online, but it's another thing actually being there, on site, getting a feel for the environment and what you actually will be doing.”

To attract affected populations to careers in manufacturing, it is important to find new and creative ways to make the public familiar with how the sector is changing and evolving. Additionally, accelerated foreign credential recognition may fill gaps at the mid or senior levels with newcomers to Canada with engineering degrees or other knowledge specializations.

Industry experts also acknowledge potential stigmas associated with the sector but see an opportunity to raise awareness by promoting its positive attributes. According to some focus group participants, the manufacturing sector is also associated with innovation, the use of technical skills, and rewarding and well-paid work. Many feel that working in manufacturing can help them gain specializations, develop and showcase their talents, and contribute to high-quality Ontario-made products.

2.3.2 Profile: Construction Workers in Ontario

Occupations

The majority of employment in the construction sector is in the trades, transportation, and equipment operator professions. Outside of the skill-based occupations, almost one in 10 of those employed in the construction sector work in business, finance, and administration roles.

In the construction sector, most people are employed in trades, transport, and equipment operators and related occupations

Percentage of labour force employed in construction across occupational categories

	Guelph	Hamilton	Kitchener – Cambridge – Waterloo	London	Ottawa	St. Catharines – Niagara	Toronto	Windsor
Legislative and senior management occupations	2.4%	1.9%	1.9%	1.3%	2.2%	1.3%	1.9%	1.2%
Business, finance and administration occupations	10.7%	9.4%	10.8%	8.3%	10.3%	9.1%	11.2%	8.2%
Natural and applied sciences and related occupations	6.2%	6.9%	6.5%	6.4%	7.3%	5.2%	7.9%	5.9%
Health occupations	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
Occupations in education, law and social, community and government services	0.3%	0.4%	0.6%	0.1%	0.4%	0.2%	0.5%	0.2%
Occupations in art, culture, recreation and sport	0.7%	0.6%	0.5%	0.7%	0.8%	0.5%	0.7%	0.4%
Sales and service occupations	3.2%	3.7%	3.7%	2.8%	3.1%	2.6%	3.5%	3.4%
Trades, transport and equipment operators and related occupations	72.8%	74.8%	73.0%	78.1%	74.6%	79.1%	72.0%	78.3%
Natural resources, agriculture and related production occupations	0.8%	0.3%	0.3%	0.2%	0.4%	0.4%	0.3%	0.6%
Occupations in manufacturing and utilities	2.9%	1.7%	2.5%	1.9%	0.8%	1.7%	1.9%	1.8%

Employment evaluated at the 2-digit NAICS level: Construction [23]

Figure 2.f, Occupation Concentration in Construction across Census Metropolitan Areas.   Source: Statistics Canada: 2021 Census

Sector Transformation

At present, work in construction tends to have some level of physicality and is usually performed on-site. While the sector is digitizing and some processes are increasingly automated, industry experts interviewed in this study expect that most digitization will especially benefit supervisory and management roles. This includes advancements in automation than can support customer engagement, bring efficiency to the sales pipeline, streamline supply chain management, and simplify procurement.

Another key opportunity for the sector rests with the prioritization of a greener or more sustainable economy and society. The shift to construction practices will undoubtedly require skilled labour to fully realize,[136] and at the same time, many employers believe that it will function as an attractor of talent. Although part of the transition depends on developing a sector-wide vision and talent roadmap—including an understanding of different jobs and skills associated with green construction—employers interviewed in this study were optimistic about the potential of green construction.

If we're thinking about getting people to see themselves [working] in the construction industry–and how that can fit into the society and the world of tomorrow–they need to see how it actually works firsthand. Particularly [when] we think about green jobs and a green economy, the transition is very important for everyone, for all of us. – Industry Expert (Construction)

The transition from fossil fuel to green energy is always going to be a major challenge as well because you're changing your way of thinking and the processes. – Industry Expert (Construction)

Education

Experts interviewed in this study spoke about how hands-on learning is considered more effective than traditional classroom learning for the sector. However, this type of learning was particularly challenged during the pandemic. Further, the sector's relationship with the secondary education system saw significant disruptions during the COVID-19 pandemic and associated lockdowns. Representatives from the construction sector report having trouble re-establishing relationships with Ontario high schools once restrictions ended.

Creating robust talent pipelines for construction requires collaboration with Ontario high schools, including industry leader participation in schools as guest speakers and offering students exposure to career options in construction. School boards that offer dual credit opportunities or programs like the Specialist High Skills Major (SHSM) also better enable students to explore career options in skilled trades.

136 Cristina Martinez-Fernandez, Carlos Hinojosa, and Gabriela Miranda, "Green jobs and skills: the local labour market implications of addressing climate change," Organisation for Economic Co-operation and Development, February 8, 2010, https://www.oecd.org/employment/leed/44683169.pdf; Canadian Construction Association, "Canada's construction sector recommendations on adapting to climate change," March 2021, https://www.cca-acc.com/wp-content/uploads/2021/03/Strength-resilience-sustainability-Full-Report-Final.pdf

Working in the compulsory trades (trades that can only be worked in by apprentices and licensed journeypersons: electricians, plumbers, HVAC, etc.) requires aptitude tests and in-class learning.[137] As a result, the compulsory trades have a more complicated training and career path and thus higher barriers to entry compared to the non-compulsory or voluntary trades (painters, carpentry, drywallers, etc.).

[There are] 100+ skilled trades, and each one is different—different hours, different schooling required, different opportunities available, different levels, different certifications, etc. – Industry Expert (Construction)

The disconnect between college programming and unions reinforces this barrier. In many cases, college diplomas earned at institutions without strong employer connections are not well-regarded, and many new graduates struggle to start apprenticeships or find an employer. The lack of harmonization in training and career pathway options points to "a huge gap in the system right now that lets down a lot of [people]," as one industry representative put it.

I don't think the training programs really align to what we need because I don't think people recognize how we work in the residential side.... There's more than enough people that want to get into construction, but there's a lot of barriers in the way. – Industry Expert (Construction)

Like the manufacturing sector, soft skills are viewed as essential for construction workers, trumping technical skills. About 42% of construction employers surveyed in this study ranked "responsibility" as a required skill, and another 56% saw it as very or somewhat important; 35% of respondents perceived "general communication" skills are key; and another 62% said they are somewhat or very important. Overall, six of the eight highly ranked skills are soft skills.

137 "Work in the compulsory trades," Skilled Trades Ontario, https://www.skilledtradesontario.ca/about-trades/work-in-the-compulsory-trades/

Required and Important Skills CONSTRUCTION

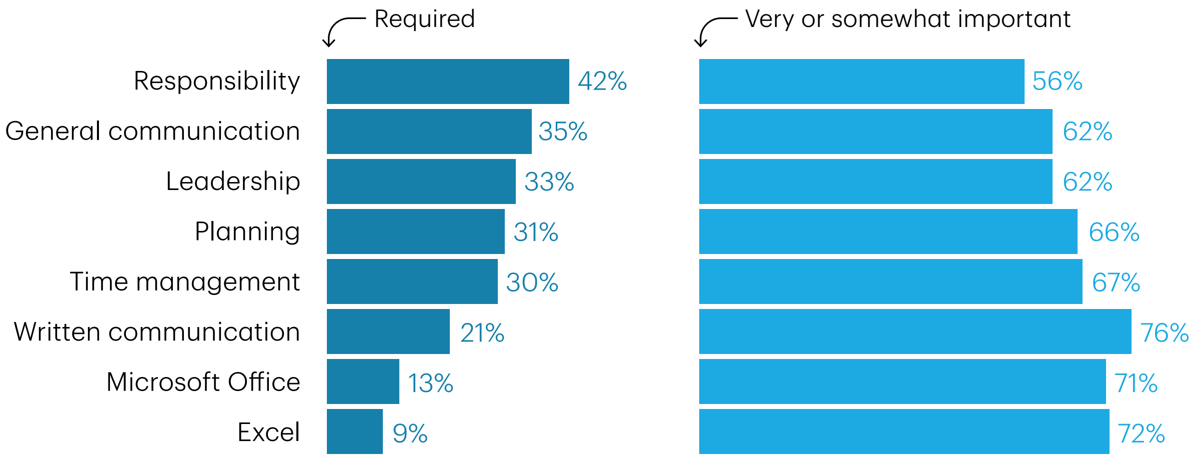


Figure 2.g, Top skill requirements construction-related roles, Source: ICTC.

Employment Barriers

The 2022 *3M State of Science Index* found that while 96% of Canadians believed that the workforce needs more skilled tradespeople, and 92% of Canadians believed that there are significant career opportunities for skilled tradespeople, 76% of Canadians would not pursue a skilled trade themselves.[138] From focus groups, it appears that barriers relating to construction can be grouped into three broad categories: prejudices, education stigmas, and stigmas relating to the physical nature of the work.

First, individuals from racialized communities and newcomers felt their career advancement was challenged due to prejudice in apprenticeship opportunities and hiring decisions. Many newcomers and underrepresented participants noted that “favouritism and nepotism fill positions,” and that “it is difficult to enter without a family member or personal advocate to open the door.” Women felt that they were not valued or trusted on job sites to the same extent as their male counterparts. While more women are entering the skilled trades, women focus group participants highlighted the male-dominated environment of construction as a key element that caused some of them to self-select out.

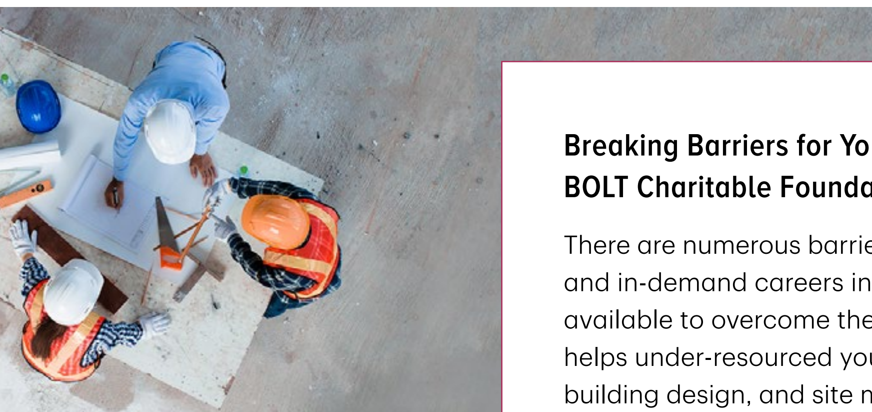
Second, the sector still faces the perception of “being lower status” compared to other career pathways offered through higher education.[139] Ingrained social biases about the skilled trades deter affected groups from pursuing fulfilling and gainful employment. Similarly, young people who could thrive in the skilled trades may be steered away due to social pressures.

138 3M Science Centre, “The future of skilled trades: inspiring the next generation,” July 15, 2022, https://sciencecentre.3mcanada.ca/articles/the-future-of-skilled-trades-how-we-can-inspire-the-next-generation

139 Wolfgang Lehmann, Alison Taylor, and Laura Wright, “Youth apprenticeships in Canada: on their inferior status despite skilled labour shortages,” Journal of Vocational Education & Training, vol. 66, no. 4 (2014): 572-589, https://www.tandfonline.com/doi/abs/10.1080/13636820.2014.958868

Last, focus group participants noted the requirement for physical abilities and mobility as significant barriers to career advancement in the sector. They noted that it is common to be "pushed away from [the] industry if you have an injury or disability." Those who get injured on site face "modified duties after WSIB [Workplace Safety and Insurance Board]," or in general could "lose their livelihood if hurt." However, this appears to be changing, with a growing balance between physicality and other characteristics. Experts and focus groups noted that the need to be physically strong is not a barrier the way it once was. The increased use of mechanical assistance on job sites is transforming workflows and making job sites more accessible to those with physical limitations.[140,141] As one focus group participant noted:

> *I'm sure everyone sees–on social media too–the big tough guy who's like, 'I work with my hands. I work 80 hours a week.' And I know I'm stereotyping here, but... it's [an] unhealthy mindset to have.* – Focus Group Participant



Breaking Barriers for Youth in the Skilled Trades: BOLT Charitable Foundation

There are numerous barriers deterring youth from pursuing prosperous and in-demand careers in construction. By making various supports available to overcome these barriers, the BOLT Charitable Foundation helps under-resourced youth find careers in construction, skilled trades, building design, and site management.

Backed by Tridel, a GTA-based high-rise residential builder, BOLT offers career information and immersive career exploration, financial support for skills training and post-secondary, and meaningful one-on-one programming. BOLT's career exploration model supports youth in achieving career goals through identifying, demystifying, and navigating pathways to employment, providing individualized assessment, determining the best options for career development, and providing the wraparound support to get there.

140 MFS Construction, "The Importance of Lifting Equipment During Construction Projects," https://mfsconstruction.com/news/2022/the-importance-of-lifting-equipment-during-construction-projects

141 In the near future mechanical assistance technologies used in the Canadian construction industry could include exoskeletons. See: Jean Thilmany, "Exoskeletons for Construction Workers Are Marching On-Site," Trimble Construction, February 27, 2019, https://constructible.trimble.com/construction-industry/exoskeletons-for-construction-workers-are-marching-on-site

The foundation works directly with contractors and unions to offer experiential learning and work placements, allowing youth to gain valuable exposure and experience in high-demand occupations. Youth participating in BOLT programs can visit active Tridel construction sites throughout the GTA, directly experiencing what the day-to-day work in the industry looks like and to better understand the culture and career pathways. Lack of information is one of the greatest barriers to entry for all youth, but especially those with no connections to the industry. BOLT ensures its participants gain clear, accurate information about the prerequisites needed to pursue their career of choice.

By arranging for youth to be on job sites, they have the opportunity to shadow industry professionals. Once student goals have been identified, BOLT provides information, support for training, and connections with industry partners to help get youth into in-demand apprenticeships. BOLT also recognizes that informal networks and word-of-mouth hiring processes still dominate the hiring process in construction. BOLT helps articulate candidate skills and positive worker qualities, reinforcing to those hiring why candidates deserve apprenticeships.

Financial barriers are some of the most difficult aspects for under-resourced youth to overcome. BOLT provides financial support of up to $2,000, on average, per skilled trade participant to cover the start-up costs. This funding helps cover upskilling and certification costs, personal protective equipment (PPE), safety training, and starter tool kits, but is flexible and based on individual needs. In certain cases, the financing can be applied to travel subsidies or wraparound supports like childcare. BOLT also provides scholarships for college and university students interested in working in site management and building design careers, encouraging youth to stay in school and complete the education necessary to succeed in the industry.

These flexible and individualized support programs, grassroots community network, and reputation within the GTA make BOLT a critical partner in helping under-resourced youth overcome barriers and find meaningful employment in Ontario's construction sector.

Moving Construction Forward

One key strategy to attract talent is to provide more transparent information and resources for students, educators, and parents to better understand the various career pathways available in construction and the trades.

> *The biggest challenge is confusion, especially for youth... Let's say they know what they want to do. How do they get there? There's a lot of different ways that you can approach it.* – Industry Expert (Construction)

This includes promoting the trades as a viable and rewarding alternative to traditional university pathways. It will be important for the sector to leverage positive and neutral perceptions to attract diverse talent. Opportunities for dynamic work, the security of union positions, or the ability to start your own business can go a long way in attracting individuals from various groups.

The Ontario government is implementing new measures to allow students to transition to full-time apprenticeship programs starting in Grade 11.[142] Consultations are also on the horizon for lowering entry requirements for the 106 skilled trades in Ontario that require a Grade 12 education.[143] This is in addition to efforts to improve trades training and simplify the apprenticeship and skilled trades system in Ontario,[144] but understanding how to find work still remains a challenge.[145] For example, unions may have additional requirements for entry into apprenticeship beyond the Ontario Ministry of Labour's minimum standards.[146]

One positive example of a step forward in diversity, equity and inclusion (DEI) for the construction industry is new labour legislation regarding washroom facilities for women.[147] The Ministry of Labour is also proposing improvements to the requirement that personal protective equipment (PPE) must be properly fitted, such that "women and 'workers with diverse body types' are specifically taken into account."[148] One industry expert reported that some employers are adopting specific programs to recruit more women and visible minorities into construction and the skilled trades. As stated by one employer, specific programming that created a "sense of security" for racialized employees was the most effective in attracting talent from diverse backgrounds.

142 "Ontario to allow Grade 11 students to enter full-time skilled trades apprenticeships," CBC News, March 8, 2023, https://www.cbc.ca/news/canada/toronto/grade-11-apprenticeship-programs-ontario-labour-1.6771809

143 Ibid.

144 Brian Dijkema and Sean Speer, "Advancing Structural Reforms to the Skilled Trades and Apprenticeships in Ontario," Ontario 360, February 13, 2020, https://on360.ca/policy-papers/advancing-structural-reforms-to-the-skilled-trades-and-apprenticeships-in-ontario/

145 Shared with ICTC in discussion with industry representatives.

146 Additional requirements may include a valid Ontario driver's license, provincially accepted identification, prior work experience in the sector, and passing pre-screening aptitude tests, among others specific to the union. For example, see Labourers' International Union of North America (LiLUNA!) Local 183 Training Centre's requirements, https://www.183training.com/apprenticeship-programs/#how-it-works

147 Allison Jones, "Ontario plans to require women-only bathrooms on large construction sites," The Globe and Mail, March 15, 2023, https://www.theglobeandmail.com/amp/canada/article-ontario-plans-to-require-women-only-bathrooms-on-large-construction/

148 Ibid.

2.3.3 Profile: Retail Workers in Ontario

Occupations

Retail occupations are highly concentrated in sales and service roles. However, there is also a relatively large proportion of people working in business occupations and roles related to health and trades and transportation. Although the retail sector comprises of various jobs, the predominance of sales and service positions has significant implications for how people perceive the industry as a viable source of gainful employment.

In the retail sector, most people are employed in sales and service occupations

Percentage of labour force employed in retail across occupational categories

	Guelph	Hamilton	Kitchener – Cambridge – Waterloo	London	Ottawa	St. Catharines – Niagara	Toronto	Windsor
Legislative and senior management occupations	0.4%	0.6%	0.6%	0.5%	0.6%	0.5%	0.9%	0.4%
Business, finance and administration occupations	9.9%	9.4%	9.7%	8.4%	8.9%	7.7%	12.2%	6.8%
Natural and applied sciences and related occupations	2.1%	1.8%	2.4%	1.5%	1.9%	1.2%	3.9%	1.9%
Health occupations	4.8%	4.5%	4.2%	5.0%	5.0%	4.8%	5.0%	6.3%
Occupations in education, law and social, community and government services	0.5%	0.4%	0.4%	0.3%	0.3%	0.2%	0.7%	0.2%
Occupations in art, culture, recreation and sport	1.3%	1.3%	1.1%	1.0%	1.0%	1.0%	1.6%	0.9%
Sales and service occupations	72.1%	73.8%	70.1%	72.9%	74.2%	75.8%	65.9%	73.6%
Trades, transport and equipment operators and related occupations	6.8%	6.7%	9.3%	8.6%	7.2%	7.1%	7.5%	7.4%
Natural resources, agriculture and related production occupations	0.2%	0.3%	0.3%	0.2%	0.2%	0.5%	0.1%	0.2%
Occupations in manufacturing and utilities	2.0%	1.2%	2.0%	1.7%	0.7%	1.3%	2.1%	2.2%

Employment evaluated at the 2-digit NAICS level: Retail [44-45]

Figure 2.h, Occupation Concentration in Retail across Census Metropolitan Areas. Source: Statistics Canada: 2021 Census

Sectoral Transformation

As consumer preferences and behaviour evolved during the pandemic, so too did the retail sector. Much of this evolution was rooted in digitization. When storefronts shuttered, the adoption of e-commerce strategies and other intelligent retail practices became paramount to sustain brick-and-mortar operations. Public health protocols put in place to mitigate the effects of COVID-19 disrupted many traditional (brick-and-mortar) retail business models. In fact, Service Canada estimates that Canadian e-commerce grew by 99.3% between February 2020 and May 2020.[149]

However, even as health protocols were gradually eased in Ontario, retailers that reopened were often operating at limited capacity. Some industry experts believe the pandemic has altered consumer habits and preferences altogether. As consumers of all ages become even more confident and familiar with online shopping,[150] the intelligent retail space is expected to continue to evolve, in some cases even blending in-person shopping experiences with digital applications.

Many retailers saw technology as a lifeline during the pandemic. Retailers surveyed during this study largely invested in technological adoption as a means of survival during 2020-2021, however, many still see the benefits of continuing to invest in digitization and automation. Over the next few years, surveyed retailers of all sizes intend to make significant changes to their business offerings and models, with the majority highlighting technological investment as the driving force. Key examples include the continued implementation of self-checkout technology and the expansion of online stores.

What significant changes do you plan to make to your business in the next 1–2 years RETAIL

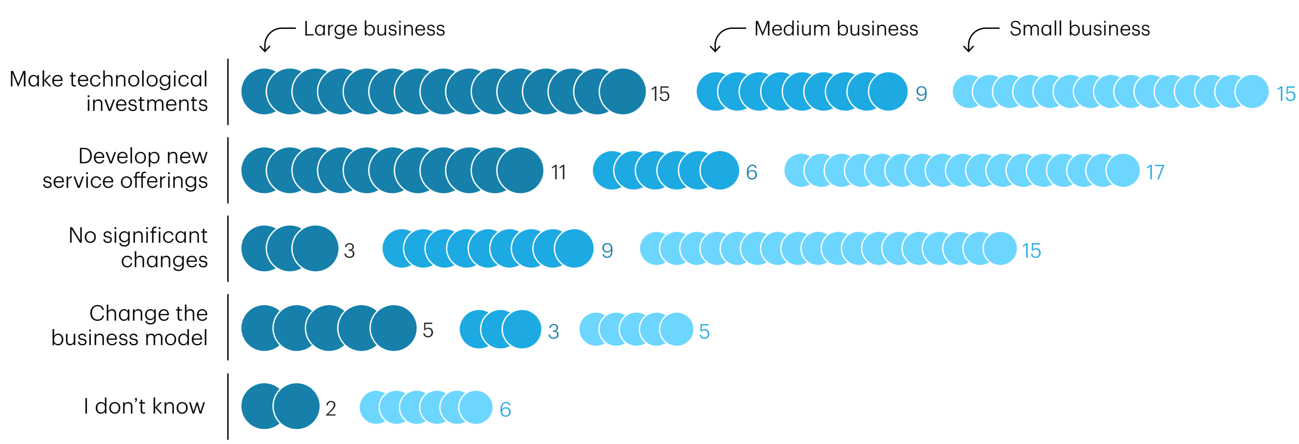


Figure 2,i. Employer Survey - What significant changes do you plan to make in the next 1-2 years? (Wholesale and retail trade)
Source: ICTC, n= 106.

149 Service Canada (Ontario), "Outlooks for COVID-19 Impacted Occupations in Ontario," Government of Canada, 2020, https://jobbank-guichetemplois.service.canada.ca/Prospect_reports/2020NOCCovidReport_E.pdf

150 Accenture, "COVID-19: New habits are here to stay for retail consumers," August 13, 2020, https://www.accenture.com/ca-en/insights/retail/coronavirus-consumer-habits

Education

Educational requirements for the retail sector vary by role. Generally, there is both the opportunity to apply skills developed in post-secondary education and develop skills through hands-on learning and work experience. While many roles in retail do not require a formal education, progressing beyond sales and service positions does tend to require some business acumen.

Whether you're aiming to be a CEO or whether you just want to be a buyer, you [need knowledge of topics like] finance, or soft skills to deal with people and to be an [effective] leader. – Industry Expert (Retail)

Educational needs are also likely to evolve as the demand for talent shifts. While most small businesses will utilize "out of the box" services or platforms like Shopify to build and manage online stores, larger retailers are likely to build and manage these tools in-house. As such, these firms will see an increasing demand for workers with core digital skills. Key roles include software developers, UX developers, graphic designers, and digital marketing specialists.[151] Diverse educational pathways will be needed to support the sector as it transitions. This includes new or revamped programs offered by traditional post-secondary institutions alongside the development of short-duration training options, including micro-credentials that can be leveraged to rapidly upskill existing retail workers. This omnichannel approach can bolster the junior talent pipeline while simultaneously offering existing workers better access to high-quality careers and real opportunities for advancement.

Barriers

The pandemic was especially challenging for retail workers. As layoffs mounted, economic and social uncertainty defined workers' lives. Frontline retail workers found themselves facing the wrath of uncivil customers objecting to shortages, public health restrictions, and other inconveniences. Dealing with difficult customers and the stress of frontline work during the pandemic combined with minimum wage pay turns many individuals off from working in the sector.

The post-pandemic period is proving to be just as difficult of an environment for retail workers. Retail workers still often work in precarious jobs with low pay and few benefits. Though retail wages are growing in Ontario, the sector faces the challenge of a difficult work environment and negative societal perceptions. Focus group participants across all demographics revealed opinions and associations about the sector that may hold it back, including few opportunities for growth, poor work-life balance, minimum wage, and the belief that retail work is just a starting point for other career paths. As noted by one participant, "We were calling people and grocery stores essential. Clearly, they are, but we don't treat them [as such]."

151 eTalent Canada, 2023, ICTC

Moving Retail Forward

As the retail sector looks to the future, large Canadian retailers are reportedly making strategic investments into diversity, equity, and inclusion initiatives, including recruitment drives, and automation technology in an attempt to address labour shortages.[152] However, what is key to a strong recovery post-pandemic is restructuring the status quo and shifting to people-centric business practices. Many individuals enjoy working in the conditions offered by retail: being on your feet, dynamic and adaptive work, teamwork, as well as commission and tips in some cases.

To help shift perceptions of retail away from temporary work or just a "starter job," employers can consider how best to overcome the perception of lack of career advancement, uncompetitive compensation and benefits, and training and development programs. Additionally, highlighting the diverse range of skills and experiences that can be gained from working in retail and promoting it as an essential part of the economy could help shift perceptions and attract more talent.

While a female-dominated workplace was generally seen as a positive feature of the sector, greater gender parity would reduce the overrepresentation of women in low-paying, precarious work. Emotional resilience training may also mitigate the challenge that many focus group participants noted with regard to dealing with difficult customers in a fast-paced and sometimes high-stress environment.

152 "2022 Canadian retail outlook," Deloitte.

2.3.4 Profile: Hospitality Workers in Ontario

Occupations

Across all CMAs, over 90% of those working in the hospitality sector are in sales and service roles. In fact, of the four affected sectors, occupations in hospitality are the most concentrated in terms of responsibility and skills.

In the hospitality sector, most people are employed in accomodation and food service occupations

Percentage of labour force employed in hospitality across occupational categories

	Guelph	Hamilton	Kitchener – Cambridge – Waterloo	London	Ottawa	St. Catharines – Niagara	Toronto	Windsor
Legislative and senior management occupations	0.0%	0.5%	0.4%	0.1%	0.4%	0.3%	0.6%	0.2%
Business, finance and administration occupations	4.3%	3.3%	2.8%	2.4%	2.7%	3.7%	4.5%	1.8%
Natural and applied sciences and related occupations	0.5%	0.5%	0.7%	0.3%	0.5%	0.5%	0.7%	0.2%
Health occupations	0.0%	0.2%	0.2%	0.2%	0.1%	0.3%	0.2%	0.3%
Occupations in education, law and social, community and government services	0.3%	0.3%	0.2%	0.4%	0.2%	0.1%	0.4%	0.1%
Occupations in art, culture, recreation and sport	0.5%	0.4%	0.5%	0.2%	0.2%	0.2%	0.4%	0.0%
Sales and service occupations	90.5%	92.1%	92.2%	93.6%	92.9%	90.2%	90.3%	94.4%
Trades, transport and equipment operators and related occupations	2.7%	2.3%	2.3%	2.4%	2.7%	3.8%	2.2%	2.4%
Natural resources, agriculture and related production occupations	0.5%	0.1%	0.4%	0.2%	0.0%	0.6%	0.1%	0.1%
Occupations in manufacturing and utilities	0.8%	0.5%	0.3%	0.3%	0.3%	0.3%	0.6%	0.6%

Employment evaluated at the 2-digit NAICS level: Accommodation and Food Services [72]

Figure 2.j, Occupation Concentration in Hospitality across Census Metropolitan Areas. Source: Statistics Canada: 2021 Census

Sectoral Transformation

The impact of COVID-19 health protocols on the hospitality sector underlined the need and opportunity for digitization. Where developments like digital platforms for hiring and onboarding were infrequently used before the sector pre-pandemic, they became a key lifeline during the pandemic. The same can be said about digital service offerings for customers.

Many hotels, for example, adopted self-check-ins, touchless payments, and app-based services to provide a superior level of guest service without putting guests or workers at risk. Restaurants also pivoted to meet customer needs by offering online ordering, curb-side pick-up and delivery, and adopting new technology such as menu QR codes. A recent survey by Restaurants Canada suggests many of these changes are now permanent.[153]

As demonstrated above, adaptations made by the hospitality sector during the pandemic were driven primarily by need. ICTC's employer survey corroborates this reality, showcasing that across company size, hospitality businesses surveyed in this study largely developed new service offerings and changed business models to survive. Although only a few respondents made new technological investments during the pandemic, the intent to invest in technology in the near future is strong.

Did your organization make any significant changes during the pandemic? HOSPITALITY

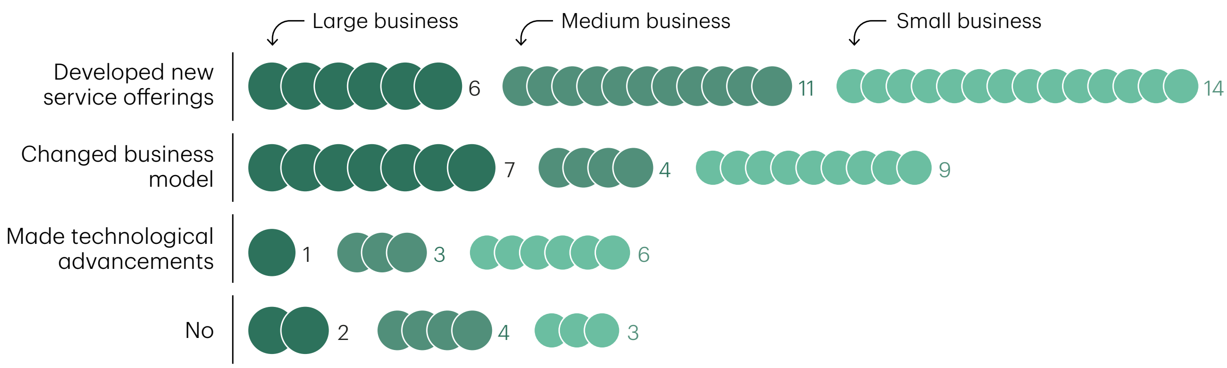


Figure 2,k: Employer Survey - Did your organization make any significant changes during the pandemic? (Food, beverage, and hospitality sector). Source: ICTC, n=52.

What significant changes do you plan to make to your business in the next 1–2 years? HOSPITALITY

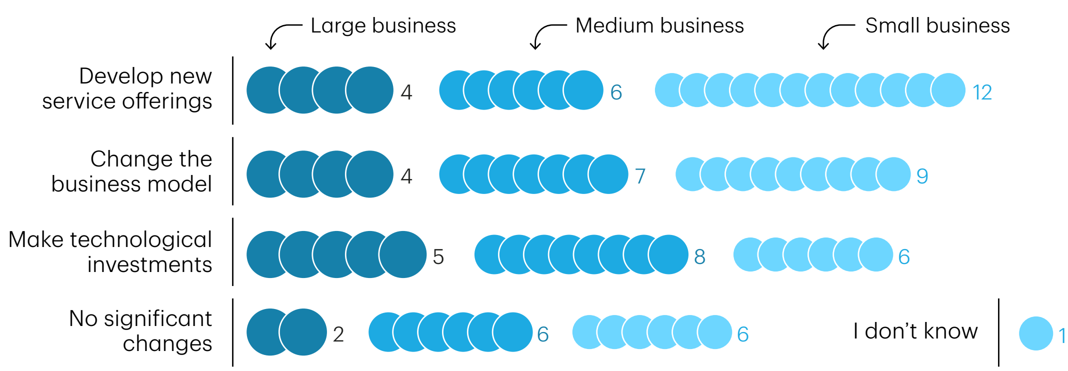


Figure 2.l: Employer Survey - What significant changes do you plan to make to your business in the next one to two years? (Food, beverage, and hospitality sector). Source: ICTC, n=52.

153 Restaurants Canada, "Foodservice facts 2021," RC Intel, 2021, https://www.restaurantscanada.org/product/foodservice-facts-2021/

Education

The pandemic has had a ripple effect on educational program uptake that directly supports the hospitality sector. Hospitality programs at colleges and universities are a significant source of talent for the sector, and the pandemic has increased the demand for these graduates. However, industry experts interviewed in this study reported a notable drop in graduates after the pandemic. They also noted that over the last few years, recent graduates from hospitality and culinary arts programs are securing first jobs in roles that would have previously taken years to obtain. As one interviewee put it, “We're seeing more people who have less experience being considered for roles [than in the past].”

However, formal education is not always a prerequisite to careers in hospitality. Employers highlighted that soft skills and behavioural competencies and skills are more valued than industry-specific education in most cases. Once an individual begins a career in hospitality, the employer can teach the hard skills or recommend a return to school to upskill, creating career advancement opportunities regardless of original education. It is imperative that the future workforce is knowledgeable of these and other opportunities for advancement in the hospitality sector. That said, automation and digital systems being adopted by the sector will require workers to be more digitally savvy. Even traditional roles such as front desk attendants and hosts will increasingly require basic digital skills. Specific on-the-job training may be required for each hotel's unique system.

Barriers

Barriers in hospitality are less structural and more about perception. Overwhelmingly, focus group participants perceived hospitality as synonymous with low-paying jobs, poor treatment by difficult clientele, and long hours. However, new graduates and current students who have chosen hospitality as a career path were also engaged in this study. These individuals had opposing perceptions. In fact, they often spoke passionately about their belief in the sector’s ability to provide long-term, stable, and gainful employment. They were also quick to acknowledge misconceptions held by the public about the sector.

Clear information on career growth opportunities is a gap for the sector. Most of the careers that focus group participants were aware of in hospitality were entry-level. Entry-level positions like housekeepers and front desk attendants are most often associated with poor reputations, including being underpaid and overworked. Without a clear understanding of advancement opportunities beyond the entry-level, job seekers can be reluctant to apply for hospitality roles altogether, creating a tighter labour market. Timely information highlighting how workers can progress out of entry-level roles into mid and senior-level positions is critical.

Other barriers in the hospitality sector relate to training and upskilling. While larger hotels and signature resorts offer training to workers moving into supervisory and managerial roles for the first time, interviewees reported that smaller businesses in the hospitality sector did not always offer such supports to newly promoted employees. One focus group participant shared the belief that "[employers] will say, 'Here, we'll promote you,' and then you sink or swim." Comprehensive onboarding and training are both essential for employees to be successful in their jobs and thrive in the long term. On that note, some employers noted challenges with onboarding employees after the pandemic. One employer said, "We have so many new employees that we are not set up to welcome them and onboard them and give them the attention and the training."

Barrier-Free Work in Ontario's Hotels

Hotel work can be demanding, but Ontario's hospitality sector is committed to "barrier-free" pathways and emphasis on professional growth. For those looking to build a career, hotels provide a great opportunity, particularly in this period of recovery from the pandemic.

Hotels often offer workers the opportunity to "work their way up" through the organization. While there is no shortcut to the top, career progression within Ontario's hotels is common; many upper-level staff and executives started in entry-level positions like dishwashers, bartenders, or room attendants. Employers in Ontario's hotel sector identify and leverage transferable and complementary skills. This "hire for attitude and train everything else" mentality allows for meaningful recognition of an individual's abilities. As mentioned by an employer in the sector, "There's a place for you, and we'll work with you to help you learn and progress."

The sector is also unique for its recognition of international credentials. Hotel jobs have provided a safe and gainful landing place for newcomers to Canada and other equity-seeking groups, such as refugees from Ukraine. Candidates can be placed in non-customer-facing positions where their skills can be utilized even without strong English language proficiency. One employer notes a five-year pipeline from entry-level to mid-manager or supervisory position: "Candidates wanting to progress their careers in hospitality have plentiful opportunities to move up quickly as long as they have a good attitude and are willing to learn."

Moving Hospitality Forward

Staff shortages are reported to be a major strain on individual hospitality workers, who face heavier workloads and potentially longer hours in order to fill gaps. Focus group participants reported strains on employee mental health caused by shortages, which have the potential to create further staff retention problems and employee experience burnout. Chronic staffing shortages "create a work environment that's very challenging." Or, as another respondent put it, "It's stressful, right? It brings a level of stress that is higher for everyone."

Although the sector has numerous employment and advancement opportunities, the sector needs a "rebranding," allowing job seekers to see it as a provider of both entry-level jobs and longer-term career opportunities. Focusing on training programs to reskill or upskill existing workers is key to retention and greater participation of women, racialized individuals, and others from equity-seeking groups.

SECTION 3

Critical Skills: Building a Career in Manufacturing, Construction, Retail, and Hospitality

The Ontario construction, manufacturing, retail, and hospitality sectors are struggling to find entry-level and mid-level talent to fill key roles. By analyzing Ontario-based job postings, key in-demand jobs were uncovered for each sector. These roles are necessary to manage and mitigate talent shortages and lead the transition to a post-pandemic workforce that is more digitally enabled and connected.

During the job posting analysis process, two methods of skill ranking were used. The first method looked at the relative frequency of skills related to a particular in-demand job. Skill frequency is only a rough proxy for the actual importance of a skill for a job. In other words, a skill being mentioned as desirable in a job posting does not mean that it is of critical importance in the candidate evaluation process. To address this, a skill importance survey was conducted with Ontario employers and recruiting professionals in the four sectors; this survey established the relative importance of skills collected from Ontario job postings.

The following tables feature in-demand jobs and their holistic skill requirements.

3.1 In-Demand Jobs and Skills: Manufacturing

Assistant Manager

Assists the manufacturing manager in planning, organizing, and supervising manufacturing processes. Monitors production and ensures quality standards are met. Trains and supervises production staff.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
General Communication	1	1
Active Listening	2	9
Responsibility/Reliability	3	5
Teamwork	4	8
Time Management	5	4
Problem Solving	6	6
Written Communication	7	7
Decision Making	8	10
Leadership	9	2
Planning	10	3
Proficiency with Microsoft Office	11	11
Proficiency with Excel	12	12
Understanding of KPI Tracking	13	14
Knowledge of Human Resources Management	14	13
Knowledge of Recruiting Practices	15	15
Knowledge of PPE Use and Protocols	16	16

Production Supervisor

Oversees manufacturing process and ensures efficiency, quality, and safety standards are met. Schedules production, trains, and manages team.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Responsibility/Reliability	1	6
Guiding Others	2	10
Leadership	3	1

General Communication	4	2
Teamwork	5	5
Knowledge Of PPE Use and Protocols	6	13
Problem Solving	7	4
Time Management	8	7
Knowledge of Good Manufacturing Process	9	12
Planning	10	3
Flexibility/Adaptability	11	9
Written Communication	12	8
Knowledge of Quality Assurance	13	20
Knowledge of Hazard Analysis Critical Control Points	14	15
Proficiency with Microsoft Office	15	11
ISO 9001 Certification	16	17
Proficiency with Excel	17	16
Knowledge of Enterprise Resource Planning (ERP)	18	14
Understanding of KPI Tracking	19	19
Knowledge of Human Resources Management	20	18

Program Manager

Takes manufacturing project contracts from inception and design through to final delivery.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Problem Solving	1	7
General Communication	2	1
Time Management	3	9
Planning	4	3
Responsibility/Reliability	5	5
Leadership	6	2
Proficiency with Program Management	7	17
Knowledge of Design Thinking	8	4
Proficiency with Project Management	9	14
Written Communication	10	6

Flexibility/Adaptability	11	8
Proficiency with Microsoft Office	12	11
Knowledge of Negotiation Tactics	13	10
Proficiency with Excel	14	16
Proficiency with Advanced Product Quality Planning	15	20
Proficiency with Microsoft Project	16	18
Knowledge of PPE Use and Protocols	17	19
Proficiency with Scrum Framework	18	12
Knowledge of Human Resources Management	19	15
Proficiency with Jira	20	13

Sales Specialist

Assists sales team to drive revenue by presenting the value of manufacturing products to prospective clients. Collaborates with internal teams to optimize production and delivery.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
General Communication	1	1
Proficiency with the Sales Pipeline	2	11
Active Listening	3	8
Building Relationships	4	4
Time Management	5	7
Written Communication	6	9
Experience with B2B Sales	7	13
Working Independently	8	10
Planning	9	5
Teamwork	10	3
Proficiency with Excel	11	15
Proficiency with CRM Platforms	12	14
Proficiency with Salesforce	13	16
Proficiency with Outlook	14	18
Proficiency with Microsoft Office	15	12
Leadership	16	2
Knowledge of Design Thinking	17	6
Proficiency with PowerPoint	18	17

Salesperson

Sells manufacturing products and services to potential customers. Responsible for reaching sales targets, managing accounts, and maintaining good customer relationships.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
General Communication	1	1
Sales Experience	2	16
Proficiency with Negotiation Tactics	3	9
Oral Communication	4	8
Responsibility	5	10
Positive Attitude	6	4
Experience with B2B Sales	7	13
Time Management	8	5
Written Communication	9	7
Proficiency with Excel	10	14
Proficiency with Salesforce	11	21
Planning	12	6
Proficiency with Outlook	13	23
Proficiency with Microsoft Office	14	12
Proficiency with CRM Tools	15	15
Autonomy/Independence	16	11
Proficiency with PowerPoint	17	22
Leadership	18	2
Knowledge of Design Thinking	19	3

Shift Supervisor

Oversees production and ensures safety and quality control. Trains, motivates, and manages staff.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Leadership	1	2
Teamwork	2	10
Problem Solving	3	7
Responsibility/Reliability	4	4

Oral Communication	5	8
General Communication	6	1
Planning	7	3
Time Management	8	6
Familiarity with Workplace Hazardous Materials Information System	9	18
Written Communication	10	5
Knowledge of PPE Use and Protocols	11	15
Proficiency with Quality Assurance	12	20
Knowledge of Hazard Analysis Critical Control Points	13	19
CPR Certification	14	17
Proficiency with Outlook	15	11
Proficiency with Excel	16	12
Proficiency with PowerPoint	17	13
Knowledge of Design Thinking	18	9
Knowledge of Enterprise Resource Planning (ERP)	19	16
Knowledge of Human Resources Practices	20	14

3.2 In-Demand Jobs and Skills: Construction

Estimator

Responsible for preparing cost estimates for industrial and commercial construction work. Reviews tender specifications and drawings to determine the scope of work and quote details. Interprets the technical specifications of tender documents.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Responsibility/Reliability	1	9
Oral Communication	2	4
Planning	3	3
General Communication	4	1
Working Independently	5	7
Written Communication	6	6

Problem Solving	7	10
Knowledge of Design Thinking	8	2
Familiarity with Negotiation Tactics	9	8
Time Management	10	5
Proficiency with Outlook	11	11
Knowledge of Project Management	12	15
Proficiency with Excel	13	12
Proficiency with PowerPoint	14	13
Knowledge of Enterprise Resource Planning (ERP)	15	14
Knowledge of Construction Management Practices	16	16
Proficiency with Microsoft Project	17	19
PQS Certification - Estimation	18	20
Certified Engineering Technologist (CET) Certification	19	18
Proficiency with On Center Software	20	17

Project Coordinator

Oversees project timelines, budgets, and resources to ensure successful completion. Collaborates with team members and stakeholders to ensure project goals are met.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Problem Solving	1	9
Planning	2	2
Leadership	3	4
Responsibility/Reliability	4	8
General Communication	5	1
Time Management	6	5
Knowledge of Project Management	7	13
Knowledge of Construction Management	8	19
Working Independently	9	7
Knowledge of Design Thinking	10	3
Written Communication	11	6
Proficiency with Microsoft Office	12	10
Proficiency with Excel	13	11

Proficiency with MS Word	14	12
Knowledge of Civil Engineering	15	18
Knowledge of Enterprise Resource Planning (ERP)	16	14
Proficiency with Microsoft Project	17	15
Proficiency with PowerPoint	18	16
Proficiency with SharePoint	19	17

Salesperson

Generates construction project leads, meets sales targets, and maintains customer relationships.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Oral Communication	1	6
Positive Attitude	2	2
Knowledge of Negotiation Tactics	3	9
Responsibility/Reliability	4	10
General Communication	5	1
Planning	6	7
Written Communication	7	8
Class G Driver's License	8	12
Leadership	9	3
Time Management	10	5
Knowledge of Design Thinking	11	4
Proficiency with Microsoft Office	12	11
Proficiency with CRM Tools	13	15
Proficiency with Excel	14	13
Knowledge of Enterprise Resource Planning (ERP)	15	14

Supervisor

Oversees construction projects to ensure safety, quality, and efficiency. Coordinates with contractors, monitors progress, and maintains records.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Leadership	1	2
Oral Communication	2	8

Teamwork	3	9
Responsibility	4	4
Problem Solving	5	6
General Communication	6	1
Planning	7	3
Time Management	8	7
Flexibility/Adaptability	9	10
Written Communication	10	5
CPR Certification	11	16
Knowledge of Enterprise Resource Planning (ERP)	12	14
Proficiency with Outlook	13	15
Proficiency with PowerPoint	14	13
Proficiency with Microsoft Office	15	11
Proficiency with Excel	16	12
Familiarity with Guaranteed Maximum Price (GMP) Contracting	17	17
Red Seal	18	18

Technician

Assists in all aspects of construction projects, including preparing sites, installing equipment, maintaining tools, and ensuring safety compliance.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Responsibility/Reliability	1	9
Problem Solving	2	4
Troubleshooting	3	15
Working Independently	4	3
General Communication	5	1
Time Management	6	6
Flexibility/Adaptability	7	10
Planning	8	8
Class G Driver's License	9	12
Knowledge of Design Thinking	10	2
Written Communication	11	5

Leadership	12	7
CPR Certification	13	20
Ability to Repair Equipment	14	13
Proficiency with Microsoft Office	15	11
Knowledge of Guaranteed Maximum Price (GMP) Contracting	16	16
CNC Designation	17	18
Proficiency with Excel	18	14
Proficiency with PowerPoint	19	19
Red Seal	20	17

3.3 In-Demand Jobs and Skills: Retail

Assistant Store Manager

Assists store manager in daily retail operations, drives sales, manages staff, maintains inventory, provides excellent customer service, and achieves store targets.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
General Communication	1	1
Leadership	1	2
Responsibility/Reliability	3	6
Teamwork	4	8
Time Management	5	5
Guiding Others	6	7
Active Listening	7	9
Knowledge of Retail Management	8	16
Familiarity with Conflict Management Tactics	9	10
Health & Safety Certification	10	15
Written Communication	11	3
Planning	12	4
Knowledge of Inventory Management	13	14
Knowledge of Human Resources Management	14	13

Proficiency with Microsoft Office	15	12
Proficiency with KPI Tracking	16	11
Knowledge of ULC Standards	17	17

Bookkeeper

Responsible for managing the financial records of a retail business. Duties include accounts payable/receivable, payroll, sales tax reporting, bank reconciliations, and financial reporting. Requires proficiency in bookkeeping software and attention to detail.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Working Independently	1	4
Knowledge of Bookkeeping Standards	2	13
Proficiency with QuickBooks	3	11
Understanding of Basic Accounting Practices	4	18
Proficiency with Accounts Receivable	5	19
Responsibility/Reliability	6	9
Written Communication	7	2
Proficiency with Accounts Payable	8	17
Proficiency with Payroll	9	16
Problem Solving	10	8
Proficiency with Simply Accounting	11	20
Time Management	12	3
Proficiency with Microsoft Office	13	14
Oral Communication	14	5
Proficiency with Excel	15	12
Knowledge of Financial Planning	16	7
Flexibility/Adaptability	17	10
Proficiency with Word	18	15
General Communication	19	1
Leadership	20	6

Business Analyst

Analyzes retail trends, customer data and sales figures to provide management insights. Supports business growth and optimizes profitability.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Responsibility/Reliability	1	9
Problem Solving	2	5
Working Independently	3	8
Planning	4	3
Written Communication	5	6
General Communication	6	1
Teamwork	7	7
Flexibility/Adaptability	8	10
Business Intelligence	9	20
Proficiency with Microsoft Office	10	14
Proficiency with Excel	11	16
Leadership	12	4
Knowledge of Design Thinking	13	2
Proficiency With Financial Analysis	14	19
Knowledge of Enterprise Resource Planning (ERP)	15	11
Proficiency with SQL	16	15
Proficiency with Tableau	17	17
Knowledge of Agile Methodology	18	18
Knowledge of Scrum Framework	19	13
Proficiency with Jira	20	12

Department Manager

Leads and motivates department sales team, optimizes store operations, manages inventory, and exceeds sales goals.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Leadership	1	1
Responsibility/Reliability	2	3
Guiding Others	3	4
General Communication	4	2

Teamwork	5	7
Time Management	6	9
Planning	7	5
Active Listening	8	10
Flexibility/Adaptability	9	6
Health and Safety Certification	9	16
Knowledge of Workplace Hazardous Materials Information System	11	17
Creativity	12	8
Knowledge of Human Resources Management	13	12
Proficiency with Microsoft Office	14	11
CPR certification	15	14
Proficiency with Excel	16	13
Safe Food Handling Certification	17	15

Marketing Specialist

Responsible for planning marketing campaigns, promoting through social media, online, and physical stores.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
General Communication	1	1
Knowledge of Design Thinking	2	4
Responsibility/Reliability	3	9
Marketing Experience	4	12
Problem Solving	5	10
Planning	6	3
Written Communication	7	5
Working Independently	8	8
Time Management	9	6
Proficiency with Social Media Platforms	10	11
Flexibility/Adaptability	11	7
Knowledge of Digital Marketing Tactics	12	16
Knowledge of Sales Pipeline	13	19
Leadership	14	2

Proficiency with Google Analytics	15	20
Proficiency with Google Ads	16	15
Proficiency with Microsoft Office	17	14
Proficiency with CRM Tools	18	18
Knowledge of SEO	19	13
Knowledge of SEM	20	17

Project Manager

Plans, executes, and closes retail projects on time, within budget, and in line with quality standards. Manages stakeholders, risks, and resources to achieve project objectives. Communicates progress, issues, and solutions to the team and senior management.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Leadership	1	4
Responsibility/Reliability	2	5
General Communication	3	1
Time Management	4	7
Teamwork	5	10
Problem Solving	6	8
Planning	7	2
Written Communication	8	6
Project Management	9	13
Microsoft Office	10	11
Knowledge of Negotiation Tactics	11	9
Proficiency with Word	12	16
Proficiency with Excel	13	15
Knowledge of Design Thinking	14	3
Knowledge of Human Capital Management	15	20
Proficiency with Microsoft Project	16	19
Knowledge of Scrum Framework	17	12
Knowledge of Enterprise Resource Planning (ERP)	18	17
Knowledge of Agile Methodology	19	18
Proficiency with Jira	20	14

Team Lead

Leads sales teams, monitors inventory, ensures customer satisfaction, and achieves sales goals. Trains new team members and motivates the team.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Teamwork	1	9
Responsibility/Reliability	2	5
General Communication	3	1
Time Management	4	6
Leadership	5	2
Problem Solving	6	7
Flexibility/Adaptability	7	10
Planning	8	4
Store Management Experience	9	18
Written Communication	10	8
Proficiency with Microsoft Office	11	11
Knowledge of Design Thinking	12	3
Knowledge of Human Resources Management	13	14
CPR Certification	14	16
Knowledge of PPE Use and Protocols	15	15
Knowledge of KPI Tracking	16	12
Proficiency with HR Information Systems	17	17
Knowledge of Enterprise Resource Planning (ERP)	18	13

3.4 In-Demand Jobs and Skills: Hospitality

Assistant Manager

Assists hospitality manager with staff training, scheduling, and inventory management. Resolves customer complaints and ensures exceptional guest experiences.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Time Management	1	3
Problem Solving	1	6
Responsibility/Reliability	3	5

Teamwork	4	8
Leadership	5	2
General Communication	6	1
Capacity for Decision Making	7	10
Active Listening	8	9
Planning	9	4
Written Communication	10	7
Proficiency with Microsoft Office	11	11
Knowledge of KPI Tracking	12	12
Proficiency with Excel	13	13

Manager

Responsible for overseeing and coordinating operations of hotels, resorts, or restaurants. Manages staff, budgets, customer service, and ensures guest satisfaction.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Leadership	1	2
Responsibility/Reliability	2	5
Teamwork	3	10
Time Management	4	8
General Communication	5	1
Planning	6	3
Problem Solving	7	7
Knowledge of the Sales Pipeline	8	12
Written Communication	9	6
Marketing Experience	10	13
Knowledge of Design Thinking	11	4
Knowledge of Negotiation Tactics	12	9
Proficiency with PowerPoint	13	15
Proficiency with P&L Management	14	18
Proficiency with Microsoft Office	15	11
Proficiency with Excel	16	14
Knowledge of Project Management	17	16

Knowledge of KPI Tracking	18	19
Knowledge of Enterprise Resource Planning (ERP)	19	17
Proficiency with Microsoft Project	20	20

Salesperson

Sells hotel rooms, event spaces, and catering services to potential customers. Meets sales targets, provides exceptional customer service, and builds long-term relationships with clients.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Oral Communication	1	7
Written Communication	2	1
Positive Attitude	3	2
Time Management	4	4
Responsibility/Reliability	5	9
Planning	6	5
General Communication	7	6
Working Independently	8	10
Knowledge of Negotiation Tactics	9	8
Leadership	10	3
Proficiency with CRM Tools	11	14
Proficiency with Microsoft Office	12	11
Experience with B2B Sales	13	12
Proficiency with Excel	14	13

Supervisor

Oversees daily operations of hospitality staff, ensures excellent customer service, handles customer complaints, and maintains facility cleanliness.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Teamwork	1	9
Leadership	2	2
Oral Communication	3	8
Responsibility/Reliability	4	4

Time Management	5	7
General Communication	6	1
Flexibility/Adaptability	7	10
Problem Solving	8	6
Smart Serve Certification	9	17
Health & Safety Certification	10	18
Planning	11	3
Written Communication	12	5
Proficiency with Microsoft Office	13	11
CPR Certificate	14	14
Proficiency with Excel	15	12
Knowledge of Enterprise Resource Planning (ERP)	16	13
Knowledge of KPI Tracking	17	15
Proficiency with PowerPoint	18	16

Team Lead

Oversees and guides team members in providing exceptional customer service to guests. Manages schedules, resolves conflicts, and maintains high standards of cleanliness and organization.

SKILL	SKILL IMPORTANCE RANK	SKILL FREQUENCY RANK
Teamwork	1	9
Leadership	2	2
Flexibility/Adaptability	3	10
Customer Service	4	14
Responsibility/Reliability	5	5
General Communication	6	1
Problem Solving	7	6
Time Management	8	7
Store Management Experience	9	13
Written Communication	10	8
Planning	11	4

CPR Certificate	12	16
Proficiency with Microsoft Office	13	11
Knowledge of Design Thinking	14	3
Knowledge of Enterprise Resource Planning (ERP)	15	12
Knowledge of KPI Tracking	16	15

Conclusion

The pandemic and resulting public health changes impacted affected several sectors in Ontario. Manufacturing, construction, retail, and hospitality all experienced significant changes in market demand, and labour market impacts quickly followed. At the same time, the pandemic disproportionately impacted labour outcomes for underrepresented groups; women, youth, newcomers, and racialized peoples in Ontario withstood the worst of this change. Today, Ontario's labour market has not just recovered but surpassed pre-pandemic employment levels; yet, the benefits of this recovery have been far from evenly distributed.

The changes experienced during the pandemic illuminated structural barriers facing affected populations. Little access to (affordable) childcare and transportation, and the curtailing or shutdown of public services were core challenges experienced. Other barriers include stigmas, difficulty accessing training, and minimal understanding of long-term career prospects. Some workers began re-evaluating their roles, and sought training and access to employment advancement opportunities within their sectors; other workers shifted gears, and began reskilling themselves to enter new sectors.

At the same time, the affected sectors themselves changed. In many cases, they leveraged technology to cope with economic impacts of the pandemic and keep their businesses afloat. Three years later, in 2023, employers in all four sectors note retaining business changes implemented during the pandemic, and seeing strong demand for talent across occupational categories. Although employers need "frontline" workers, they also articulate new employment opportunities that require workers with sectoral domain knowledge, technical or digital competencies, and strong human skills.

Undoubtedly, Ontario's economy and labour market experienced some structural change over the last few years. This change presents both challenges and opportunities, but a resilient recovery requires a holistic focus on equity. Creating the conditions for a labour market that can withstand and thrive in the face of future challenges is rooted in opportunities for all Ontarians to participate and succeed.

Appendix

Research Methodology

This report was developed using a combination of primary and secondary research.

Secondary Research

A literature review of the manufacturing, construction, retail, and the hospitality sectors was completed. This review included an analysis of Canadian and international literature to identify emerging trends facing the sectors. It also included analysis of data at the national, provincial, and regional levels. Additionally, data analysis was completed to identify challenges and barriers faced by racialized individuals.

Primary Research

Primary research consisted of key informant interviews, focus groups, an employer survey, insight from an employer advisory committee, and web scraping.

Key Informant Interviews

Key informant interviews (KIIs) were held with a variety of subject matter experts in Ontario. A total of 29 key informant interviews were completed in this study. Representatives were from companies in the affected sectors, community support organizations, and educational institutions. KIIs play an important role in gathering novel insights and detailed feedback based on lived experience.

Employer Survey

From August to October 2022, ICTC conducted an employer survey focusing on employers in the four affected sectors in Ontario. Survey respondents were asked a range of questions, including about in-demand roles and skills, expected hiring, hiring challenges, and other labour market considerations. The survey received 525 responses.

Skill Importance Survey

In January 2023, ICTC conducted a survey of skill importance, capturing insights from 200 employers in the four affected sectors.

The goal of the survey was to gain a deeper understanding of the relevance of skills required for specific occupations within these sectors. The survey covered six jobs associated with the manufacturing sector, eight roles associated with the retail sector, five roles associated with the construction sector, and another six roles associated with hospitality: a total of 23 jobs were included in this survey.

The survey questions asked relevant respondents (i.e., employers responded for their specific sector only) to rank specific skills for each of these jobs on a scale from 1 (not at all important) to 5 (required). This exercise provides important insights into skill requirements by occupation and can assist in guiding decisions on training and upskilling. This information is also used to update ICTC's Skill Mapping Tool.

Jobs Surveyed

OCCUPATION	SECTOR
Manufacturing Assistant Manager	Manufacturing
Manufacturing Program Manager	Manufacturing
Manufacturing Production Supervisor	Manufacturing
Manufacturing Sales Specialist	Manufacturing
Manufacturing Salesperson	Manufacturing
Manufacturing Supervisor	Manufacturing
Retail Assistant Store Manager	Retail Trade
Retail Bookkeeper	Retail Trade
Retail Business Analyst	Retail Trade
Retail Department Manager	Retail Trade
Retail Marketing Specialist	Retail Trade
Retail Project Manager	Retail Trade
Retail Service Manager	Retail Trade
Retail Team Lead	Retail Trade
Construction Estimator	Construction
Construction Project Coordinator	Construction
Construction Salesperson	Construction
Construction Supervisor	Construction
Construction Technician	Construction
Food Services Assistant Manager	Hospitality
Food Services Manager	Hospitality
Food Services Team Lead	Hospitality
Hospitality Assistant Manager	Hospitality
Hospitality Salesperson	Hospitality
Hospitality Supervisor	Hospitality

Salary Survey

In January 2023, ICTC conducted a survey of 323 employers in the four affected sectors to understand average wages for in-demand jobs. Key insights from the survey were used to inform this report and shared with the advisory committee. This information is also used to update ICTC's Skill Mapping Tool for these employment pathways and ICTC's eTalent dashboards.

Advisory Committee

ICTC developed an advisory committee to review and validate the results of this research and ensure that results were reflective of real-life labour market realities. The advisory committee was comprised of 15 employers from the four affected sectors, and it met twice during the life of this project. ICTC also provided advisory committee members opportunities to review and validate core report findings, and offer additional feedback and insight, as required.

Focus Groups

Between September 2022 and January 2023, ICTC held focus groups with affected populations (women, youth, newcomers to Canada, and racialized persons) in the key sectors (retail, hospitality, construction, and manufacturing). The purpose of these sessions was to understand how the employment experience and career advancement of equity-seeking groups had been impacted by the COVID-19 pandemic and increasing digitization, as well as to identify the barriers they faced and their career advancement pathways looking forward. ICTC asked participants what personal, structural, and systemic barriers they face in their employment and career advancement, as well as their employment experiences in the impacted sectors during the pandemic, and gained additional perceptions held by participants through a series of word association exercises. In total, 165 individuals participated across nine sessions throughout southwestern Ontario (Toronto, Ottawa, Guelph, London, Niagara, Hamilton, Kitchener, and Windsor).

Web Scraping and Job Data Analysis

From May 2022, ICTC's Data Science team collected key data on jobs and skills for Ontario's sectors impacted by the pandemic. ICTC captured information on the volume of job postings and the top technical and human skills associated with them. Skill frequency (identified by job postings) was used to inform the skill survey.

Limitations of Research

As with all research on novel or evolving topics, some limitations exist. The most notable limitations related to this research are the following:

Limited available data on Canada's diverse populations relating to the topics in this report makes it challenging to quantitatively assess broader impacts of these experiences—for example, the impact on economic and labour market mobility, impact on health and well-being, etc. cannot be established.

This report is also limited by location. Engaging affected populations can be difficult, and as a result, certain areas of Ontario were chosen as core locations for focus areas and interviews with workers: Toronto, Hamilton, St. Catharine's/Niagara, Kitchener, Windsor, London, Ottawa. Northern and eastern parts of the province were not included in this analysis.

Lastly, a core consideration is sample size. Although ICTC engaged a strong sample of employers (500+) and workers (165), ultimately, this sample is too small to be representative of the entire province. As such, the data and themes presented in this work should be viewed as insights and not definitive trends.