Local Labour Market Report

Peel-Halton plan

2021-2022



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BACKGROUND

The Peel Halton Workforce Development Group (PHWDG) is a community based, not-for-profit corporation that serves the Peel and Halton Regions. The PHDWG functions as a neutral broker of research, disseminator of information and facilitator of collaborative partnership development. The PHWDG works with the community to identify trends and opportunities in the labour market environment which impact our workforce. We then nurture the ideas which emerge from our consultations and seek to develop partnerships to address these issues, to further help our community to thrive in our local economy. Operating as part of the Local Boards Network of Ontario, PHWDG is one of 25 local planning board areas funded by the Ontario Ministry of Labour, Training, and Skills Development to conduct and distribute local labour market research and engage community stakeholders in a planning process that supports local solutions to local issues.



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1. Introduction

This past year has been unlike any other for most of us. The COVID-19 pandemic has resulted in a tragic loss of lives and health impacts for many others. The response to the pandemic, including social distancing measures and lockdowns, have affected everyone in all facets of our daily living, from our jobs, to how education is delivered, to the quality of our social interactions and our mental health. These circumstances continue and the impact of the pandemic will reverberate for some time to come.



Workforce planning boards across Ontario are expected to produce Local Labour Market Plans, which are intended to summarize existing labour market conditions in local areas and to propose specific initiatives to address these challenges, following a consultative process with a wide array of labour market stakeholders.

This year, labour market circumstances have been dramatically impacted. The pandemic and its aftermath have not only created significant short-term upheaval but have set in motion disruptions that will define the new normal. This includes greater reliance on e-commerce as well as working from home, and at the same time continuing uncertainty for industries which usually operate on the basis of physical closeness or crowding, from nail salons to theatres, from gyms to indoor dining. Any significant shift towards more work being done remotely will have considerably impacts on commuting, commercial real estate, and downtowns or office parks and their surrounding support businesses.

This report combines both current analysis about the impact of COVID as well as some of the traditional data-sharing that typically makes up a local labour market plan. The report is organized as follows: This report combines both current analysis about the impact of COVID as well as some of the traditional data-sharing that typically makes up a local labour market plan.

- Profile of employers An overview of establishments in each of Peel and Halton, tabulated by number of employees and by industry sector; this data provides a snapshot of the profile of firms that operate in the local area
- Profile of population Basic population data, including: number of residents and growth rates over the last five years, by municipality; the components of population change (immigration, natural increase, intraand inter-provincial mobility); demographic distribution by age and gender;
- Labour market data analysis Review of unemployment and employment rates by various categories, unpacking the impact of COVID on specific population groups as well as other measurements;
- Highlights from the GTA survey A summary of the main findings of PHWDG's 10th annual survey of employers, the focus of which was the impact of COVID and how employers responded;
- Employment Ontario services data Profile of client data for several Employment Ontario services, including Employment Services, Literacy and Basic Skills, Second Career, Youth Job Connection, Canada Ontario Job Grant and Apprenticeship.

This information provided the backdrop for the consultation process that led to the development of action items for the upcoming year. That process and its outcomes are described in the section on Consultation and Action Plan. These outcomes describe specific actions which are being proposed, together with lead proponents and potential partners.

These actions are grouped under seven main headings:

- 1. Raising digital skills
- 2. Challenges relating to recruiting entry-level workers
- 3. Mental health challenges for employers and employees arising from the pandemic
- 4. Youth who are and will be affected by the disruption caused by the pandemic
- 5. Forecasting labour market trends in the post pandemic period
- 6. Re-skilling
- 7. Skilled trades

We hope you find the information provided in this report both timely and useful. We encourage you to provide any feedback you may have and would welcome your participation in any of the initiatives being proposed as action items for the coming year.

Stay well, stay safe and we look forward to engaging with you over the course of this coming year

2021

2. Profile of employers in Peel and Halton

Number of Businesses, June 2020

Statistics Canada maintains an on-going count of business establishments across the country, relying on administrative data (corporate income tax and GST files) and surveys of businesses. This census of businesses is called Canadian Business Counts, which Statistics Canada releases every six months, in June and December. This analysis relied on the June 2020 data.

With the closure of many businesses, as a result of the pandemic and its aftermath, Statistics Canada has issued the following qualification regarding the June data:

"The June 2020 counts cannot be used to measure the impacts of the COVID-19 pandemic. These figures continue to include most businesses that closed in the months since the crisis began. Those that close permanently will eventually cease to be included, once business wind-down and closeout procedures are completed and confirmed, which can take several months."

Number of businesses, by size of establishment and by industry

Tables 1 and 2 provide the summary data for all businesses located in Peel and Halton Regions. The table provides two different counts:

- Classified businesses: the major part of the table provides the data for all businesses for which the industry classification is known and shows the breakdown by number of employees as well;
- 2. All businesses, classified and unclassified: the last three rows of the table present the distribution of all businesses

(classified and unclassified) by number of employees; 11% and 12% of the total counts in each of Peel and Halton represent businesses that are unclassified, matching the provincial average of 11%. This means that for these establishments, Statistics Canada was unable to identify which industries these businesses belonged to.

Explanation for specific columns in the tables:

- The second-to-last column in each table shows the percentage distribution of all classified businesses by industry;
- The last column shows the ranking of the total number of classified businesses by industry, from the largest (1) to the fewest (20) number of businesses. The five industries with the most classified businesses have their ranking numbers bolded in red;
- The highlighted cells identify the three industries with the largest number of firms for each employee size category;

Where under the percentage distribution a cell has 0%, it does not mean there are no firms in that category, only that the number of firms, when expressed as a percentage of the total, is below 0.5% of the total and has been rounded down to 0%. Also, where the total is slightly less or more than 100%, this is due to rounding of the component percentages.

INDUSTRY SECTOR 2-DIGIT NAICS			NUN	BER OF	EMPLO	YEES				
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL	%	RANK
11 Agriculture	420	88	21	19	9	2	0	559	0	17
21 Mining	33	7	3	1	2	0	0	46	0	19
22 Utilities	95	11	4	1	3	2	2	118	0	18
23 Construction	9835	3055	713	367	245	92	66	14373	9	4
31-33 Manufacturing	1994	953	553	452	435	192	210	4789	3	11
41 Wholesale Trade	2501	1308	700	596	530	210	169	6014	4	10
44-45 Retail Trade	4666	2191	1096	693	398	214	137	9395	6	6
48-49 Transportation/Warehousing	21352	13359	463	275	226	111	140	35926	22	1
51 Information and Cultural	1049	359	72	47	46	13	28	1614	1	14
52 Finance and Insurance	6477	840	187	194	154	37	39	7928	5	8
53 Real Estate, Rental, Leasing	23895	1363	190	126	65	24	12	25675	16	2
54 Professional Scientific Tech	15378	6966	616	343	208	83	68	23662	14	3
55 Management of Companies	993	50	41	29	72	50	91	1326	1	15
56 Administrative Support	4790	1185	379	256	198	105	144	7057	4	9
61 Educational Services	1121	260	117	119	69	26	11	1723	1	13
62 Health Care & Social Assist	4592	2151	762	495	224	61	69	8354	5	7
71 Arts, Entertainment & Rec	959	168	59	45	52	19	22	1324	1	16
72 Accommodation & Food	1220	772	659	555	591	150	55	4002	2	12
81 Other Services	5634	2730	676	330	157	36	20	9583	6	5
91 Public Administration	7	2	0	0	3	4	16	32	0	20
CLASSIFIED BUSINESSES	107011	37818	7311	4943	3687	1431	1299	163500		
Percentage of all classified and unclassified businesses	67%	23%	4%	3%	2%	1%	1%	100%		
Cumulative percentage	67%	90%	94%	97%	99%	99%	100			
ONTARIO percentage of classified and unclassified businesses	70%	18%	5%	3%	2%	1%	1%			

Table 1: Number of businesses by employee size range, Peel, June 2020

INDUSTRY SECTOR 2-DIGIT NAICS			NUM	BER OF	EMPLOY	EES				
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL	%	RANK
11 Agriculture	360	57	14	17	7	2	3	460	1	17
21 Mining	37	10	2	1	1	2	0	53	0	19
22 Utilities	66	11	4	1	1	3	1	87	0	18
23 Construction	3812	1136	350	191	108	29	18	5644	9	3
31-33 Manufacturing	744	312	182	123	128	71	79	1639	3	11
41 Wholesale Trade	1043	565	273	158	157	55	42	2293	4	10
44-45 Retail Trade	1904	858	553	413	246	111	78	4163	6	6
48-49 Transportation/Warehousing	2242	806	77	64	52	33	25	3299	5	8
51 Information and Cultural	633	187	41	36	21	5	7	930	1	14
52 Finance and Insurance	3819	520	132	116	101	14	19	4721	7	5
53 Real Estate, Rental, Leasing	11471	608	88	59	28	6	4	12264	19	2
54 Professional Scientific Tech	8586	3183	310	202	105	39	20	12445	19	1
55 Management of Companies	748	35	13	21	21	14	18	870	1	16
56 Administrative Support	1884	457	231	129	68	19	35	2823	4	9
61 Educational Services	588	157	46	38	39	21	9	898	1	15
62 Health Care & Social Assist	2961	1490	411	257	162	43	45	5369	8	4
71 Arts, Entertainment & Rec	749	142	52	42	45	16	14	1060	2	13
72 Accommodation & Food	440	238	249	225	320	81	28	1581	2	12
81 Other Services	2207	960	373	183	55	19	9	3806	6	7
91 Public Administration	5	1	0	0	0	0	9	15	0	20
CLASSIFIED BUSINESSES	44299	11733	3401	2276	1665	583	463	64420		
Percentage of all classified and unclassified businesses	70	18	5	3	2	1	1	100		
Cumulative percentage	70	88	93	96	98	99	100			
ONTARIO percentage of classified and unclassified businesses	70%	18%	5%	3%	2%	1%	1%			

Table 2: Number of businesses by employee size range, Halton, June 2020

Some observations:

- Number of small firms: Businesses are by far made up of small establishments. 67% of the classified and unclassified firms in Peel have no employees,¹ and another 23% have 1-4 employees; in Halton, no employee firms account for 70%, and 1-4 employees another 18%; Halton's numbers exactly match those for Ontario (last line of the table: 70% for no employees and 18% for 1-4 employees), while Peel shows a slightly smaller share of solo operators and a larger share of establishments with 1-4 employees;
- · Highest number of firms by industry: The second to last column provides the percentage distribution of all firms by industry. The three industries with the largest number of firms in Peel are Transportation & Warehousing (accounting for 22.0% of all establishments), followed by Real Estate and Rental & Leasing (15.7%), then in third place, Professional, Scientific & Technical Services (14.5%); in Halton the configuration is different: Professional, Scientific & Technical Services has the largest number of firms (19.3%), followed closely by Estate and Rental & Leasing (19.0%), with Construction a distant third (8.8%); by way of context, the five largest industries by number of firms in Ontario are: Real Estate and Rental & Leasing (20.7%); Professional, Scientific and Technical Services (13.8%); Construction (9.8%); Health Care & Social Assistance (7.2%) and Retail Trade (6.5%);
- Highest number of firms by size and industry: The three largest industries by each employee size category have also been highlighted. The tables demonstrate

how the very large number of firms in the no employee size category drives the total numbers (that is, in both Peel and Halton, for Real Estate and Rental & Leasing and Professional, Scientific & Technical Services, and for Transportation & Warehousing in Peel and for Finance & Insurance in Halton). In the mid-size ranges (10-49 employees), Peel and Halton both have high numbers of establishments among Retail Trade and Accommodation & Food; Peel also has a high number of firms in this size category among Wholesale Trade, while in Halton the third prominent sector is Health Care & Social Assistance. Among the largest firms (100+ employees), the two areas diverge: while they both have Manufacturing as one of the largest sectors, in Peel the other sectors are Wholesale Trade and Administrative & Support, whereas in Halton the other two sectors are Retail Trade and Health Care & Social Assistance.

Tables 3 and 4 illustrate the distribution of establishments by number of employees among the municipalities of Peel and Halton. In Peel, Mississauga accounts for slightly over half (52%) of all establishments, with Brampton accounting for another 42%, while Caledon makes up the remaining 6%. Among firms with 100 or more employees, Mississauga is home to 73% of Peel's largest employers, whereas Brampton holds 23% and Caledon has 4%.

In Halton, Oakville accounts for 42% of all establishments, with Burlington in second place with 32%. Among firms with 100 or more employees, the percentage breakdown is: Oakville (41%); Burlington (38%); Milton (12%); and Halton Hills (9%).

¹ This actually undercounts the number of self-employed individuals. The Statistics Canada's Canadian Business Count database does not include unincorporated businesses that are owner-operated (have no payroll employees) and that earn less than \$30,000 in a given year.

Drilling down further by industry, we know that there are a large number of solo operators in the following sectors:

- In <u>Real Estate and Rental & Leasing</u>, these solo operators consist primarily of landlords of residential buildings, and secondarily of real estate agents and then landlords of commercial properties;
- In <u>Professional, Scientific & Technical</u> <u>Services</u>, the range of solo operators represents various professionals, such as management consultants, IT professionals, bookkeepers and accountants, engineers and lawyers;
- In <u>Transportation & Warehousing</u> (Peel), the large numbers are among general freight trucking and taxi and limousine services;
- The large number of <u>Finance & Insurance</u> establishments with no employees in Halton are primarily in a sector known as other financial investment activities, typically involved in the buying or selling of financial contracts.

			NUMBER OF	EMPLOYEES			_
	None	1-4	5-19	20-99	100+	TOTAL	Percent of all
Peel	106883	37648	11861	4972	1315	162679	firms
Mississauga	56659	16220	7404	3472	960	84715	52%
Brampton	44190	19354	3697	1249	298	68788	42%
Caledon	6034	2074	760	251	57	9176	6%

Table 3: Distribution of firms by number of employees by municipalities, Peel, June 2020

Statistics Canada, Canadian Business Counts, June 2020

Table 4: Distribution of firms by number of employees by select municipalities, Halton, June 2020

			NUMBER OF	EMPLOYEES	i		
	None	1-4	5-19	20-99	100+	TOTAL	Percent
Halton	44246	11662	5516	2194	454	64072	firms
Oakville	19109	4980	2086	829	186	27190	42%
Burlington	13610	3448	2064	882	172	20176	32%
Milton	7522	2107	763	291	56	10739	17%
Halton Hills	4005	1127	603	192	40	5967	9%

Tables 5 and 6 show the ten industry sub-sectors of establishments with the <u>highest number of employees</u> in each of Peel and Halton. This is not entirely a proper comparison. Some industries have a large number of sub-sectors, such as Manufacturing, with 21.

Others, such as Professional, Scientific & Technical Services, have only one subsector, and many others have only three or four. (There are further sub-categories at the 4-digit level.) Nevertheless, these industrial sub-categories do highlight prominent subsectors and illustrate varying distribution of firms by number of employees. In Peel (Table 5), truck transportation also registers a very high number among establishments with employees, although a significant proportion (96%) are among firms with 1-4 employees. Similarly, the Professional, Scientific & Technical Services sector figures prominently, with around 84% of its employers having 1-4 employees. At the other end of the employee size continuum, Administrative & Support Services have 143 establishments with 100 or more employees. The next largest number in that category is 68 firms among the Professional, Scientific & Technical Services sector.

		NUMBE	r of empi	OYEES	
3-aigit NAICS industry sub-sector	1-4	5-19	20-99	100+	TOTAL
484 - Truck transportation	11882	329	117	24	12352
541 - Professional, scientific and technical services	6966	959	291	68	8284
238 - Specialty trade contractors	2050	822	238	45	3155
621 - Ambulatory health care services	1993	1001	112	19	3125
722 - Food services and drinking places	736	1172	683	45	2636
561 - Administrative and support services	1145	611	287	143	2186
811 - Repair and maintenance	1167	472	80	3	1722
531 - Real estate	1252	204	43	8	1507
488 - Support activities for transportation	1070	231	100	36	1437
236 - Construction of buildings	939	212	63	9	1223

Table 5: Top ten industry sub-sectors by number of firms with employees, Peel, June 2020

In Halton (Table 6), the top ten industry sectors are almost entirely the same as those in Peel, only in a different order, with Peel and Halton sharing nine of the same subsectors. The difference in Halton is Personal & Laundry Services, whereas in Peel it is Support Activities for Transportation.

	NUMBER OF EMPLOYEES									
3-aigit NAICS industry sub-sector	1-4	5-19	20-99	100+	TOTAL					
541 - Professional, scientific and technical services	3183	512	144	20	3859					
621 - Ambulatory health care services	1424	528	67	9	2028					
238 - Specialty trade contractors	714	373	82	9	1178					
722 - Food services and drinking places	225	461	378	27	1091					
561 - Administrative and support services	435	346	82	34	897					
484 - Truck transportation	618	55	31	5	709					
531 - Real estate	563	101	16	2	682					
812 - Personal and laundry services	330	232	25	1	588					
236 - Construction of buildings	383	142	29	3	557					
811 - Repair and maintenance	281	201	21	3	506					

Table 6: Top ten industry sub-sectors by number of firms with employees, Halton

Change in the number of firms by industry, June 2019 to June 2020

Changes in the number of employers are experienced differently across the various industries. Tables 7 and 8 highlight the changes in the number of firms by industry and by employee size between June 2019 and June 2020 for Peel and Halton. Each table also lists the total number of firms in each industry in June 2020, to provide a context. The colour-coding of the tables (green where there is an increase, orange where there is a decrease) helps to illustrate any pattern.

It should be noted that Statistics Canada discourages comparisons of this sort, on the grounds that their data collection and classification methods change. At the very least, these comparisons can provide the foundation for further inquiry, tested by local knowledge about changes in industries.

It also bears repeating that Statistics Canada made clear that the June 2020 counts cannot be used to measure the impacts of the COVID-19 pandemic, because there would be a delay in the time it takes for a business to close and the administrative paperwork to be completed to register that event, such that the June figures would not be a timely representation of the degree of possible business closures.

Peel. The total net changes (last row) makes clear that there would have been a net employment increase as a consequence of the various changes among the various employee-size categories, with significant increases in all categories, except for a decline of one firm in the 100 or more employees column. The increase in the total number of establishments between June 2019 and June 2020 was 1.8%.

It is slightly more difficult to make determinations regarding the net employment changes by industry, because of how the increases and decreases might balance each other out. For example, an additional firm in the 100 or more employees category does not mean that at least 100 employees have been added to the workforce. It could be a firm that grew its workforce from 95 to 105, resulting in an increase of 10 workers, moving the firm from one column to the next column. If there were 30 losses among the "0" employee category in that sector, this would result in a net employment loss.



	Firm size (number of employees)									
INDUSTRY	0	1-19	20-99	100+	Total	Total number of firms June-20				
Agriculture, forestry, fishing and farming	-21	4	-3	0	-20	559				
Mining and oil and gas extraction	0	-2	0	0	-2	46				
Utilities	2	-2	0	-1	-1	118				
Construction	-340	11	17	1	-311	14373				
Manufacturing	-119	-51	3	0	-167	4789				
Wholesale trade	-209	-55	8	-9	-265	6014				
Retail trade	-157	9	7	-10	-151	9395				
Transportation and warehousing	1869	357	-3	11	2234	35926				
Information and cultural industries	-33	-8	-5	2	-44	1614				
Finance and insurance	-176	-5	7	0	-174	7928				
Real estate and rental and leasing	1456	-3	-39	-2	1412	25675				
Professional, scientific and technical services	-288	243	18	10	-17	23662				
Management of companies and enterprises	-45	-22	3	2	-62	1326				
Administrative and support	2	72	10	-1	83	7057				
Educational services	67	32	2	0	101	1723				
Health care and social assistance	107	132	-4	0	235	8354				
Arts, entertainment and recreation	-44	13	-4	-1	-36	1324				
Accommodation and food services	-109	27	36	-2	-48	4002				
Other services	-35	147	-1	1	112	9583				
Public administration	2	0	0	-2	0	32				
TOTAL	1929	899	52	-1	2879	163500				

Table 7: Change in the number of employers, by industry and firm size, Peel, June 2019 to June 2020

Statistics Canada, Canadian Business Counts, June 2020

It is likely the case that the following sectors experienced net employment increases:

- Transportation & Warehousing
- Professional, Scientific & Technical Services
- Administrative & Support Services
- Educational Services
- Health Care & Social Assistance
- Other Services

Similarly, it is likely the case that the following industries had net employment losses:

- Agriculture, Forestry, Fishing & Farming
- Mining and Oil & Gas Extraction
- Utilities
- Manufacturing
- Public Administration

Halton. Halton witnessed net increases across all employee-size categories, whereas the total number of firms grew by approximately 1.1% between June 2019 and June 2020. There were likely very small employment losses among Mining and Oil & Gas Extraction as well as Utilities. On the other hand, there would have been clear net employment losses in the Manufacturing sector, and likely among Wholesale Trade.

There were probable net employment increases in the following industries:

- Transportation & Warehousing
- Management of Companies & Enterprises
- Health Care & Social Assistance
- Arts, Entertainment & Recreation

		Firm	n size (nu	imber of	employ	ees)
INDUSTRY	0	1-19	20-99	100+	Total	Total number of firms June-20
Agriculture, forestry, fishing and farming	-16	0	-3	2	-17	460
Mining and oil and gas extraction	0	-1	0	0	-1	53
Utilities	-2	0	0	0	-2	87
Construction	-164	21	6	2	-135	5644
Manufacturing	-35	-19	-2	-5	-61	1639
Wholesale trade	-81	-7	8	-3	-83	2293
Retail trade	-58	80	-2	-4	16	4163
Transportation and warehousing	191	36	7	-3	231	3299
Information and cultural industries	-16	3	-3	3	-13	930
Finance and insurance	-84	-10	17	-2	-79	4721
Real estate and rental and leasing	783	-18	-7	1	759	12264
Professional, scientific and technical services	-181	25	-3	-1	-160	12445
Management of companies and enterprises	19	-7	4	2	18	870
Administrative and support	-12	1	-4	3	-12	2823
Educational services	-19	25	-8	2	0	898
Health care and social assistance	77	112	-2	12	199	5369
Arts, entertainment and recreation	-2	4	5	-1	6	1060
Accommodation and food services	-43	6	24	0	-13	1581
Other services	-18	58	-5	-1	34	3806
Public administration	-2	-1	-2	1	-4	15
TOTAL	337	308	30	8	683	64420

Table 8: Change in the number of employers, by industry and firm size, Halton, June 2019 to June 2020

3. Profile of Peel and Halton population

Population change

Both Peel and Halton are growth regions in Ontario, both of whose annual percentage population increases typically surpass the average increase for Ontario. That growth, however, is experienced differently by the various municipalities, with Milton and Brampton exhibiting high growth (3% to 4.5%) over the last four years, while Burlington and Mississauga have lower growth patterns (0.3% to 1.5%). Most areas experienced a decline in their growth rates between 2019 and 2020.

Between 2016 and 2020, Ontario's population grew by 6.2%, while for Peel Region the figure was 9.1% and for Halton Region it was 8.0%.

Table 9: Estimated population and annual percentage change, July 1 of eachyear, 2016-2020

	2016	2017	2018	2019	2020
ONTARIO					
Population	13,875,394	14,070,141	14,308,697	14,544,718	14,734,014
Annual change		1.4%	1.7%	1.6%	1.3%
PEEL					
Population	1,432,962	1,462,199	1,496,106	1,533,961	1,563,641
Annual change		2.0%	2.3%	2.5%	1.9%
Mississauga					
Population	746,352	751,823	758,099	769,420	774,116
Annual change		0.7%	0.8%	1.5%	0.6%
Brampton					
Population	617,571	638,663	664,492	689,856	713,463
Annual change		3.4%	4.0%	3.8%	3.4%
Caledon					
Population	69,039	71,713	73,515	74,685	76,062
Annual change		3.9%	2.5%	1.6%	1.8%
HALTON					
Population	565,112	572,957	584,025	597,770	610,581
Annual change		1.4%	1.9%	2.4%	2.1%
Oakville					
Population	199,505	202,440	207,461	212,715	217,718
Annual change		1.5%	2.5%	2.5%	2.4%
Burlington					
Population	188,387	188,899	189,811	191,902	193,668
Annual change		0.3%	0.5%	1.1%	0.9%
Milton					
Population	114,276	117,994	122,982	128,563	133,812
Annual change		3.3%	4.2%	4.5%	4.1%
Halton Hills					
Population	62,944	63,624	63,771	64,590	65,383
Annual change		1.1%	0.2%	1.3%	1.2%

Statistics Canada, Population estimates, Table: 17-10-0142-01

Components of population change

For both regions, the major contributor to population growth is immigration. Charts 1 and 2 illustrate how various population dynamics impact the net change in population. In Peel (Chart 1), immigration has added 25,000 to 35,000 residents per year over the last five years. Natural increase (births minus deaths) has usually added around 9,000 per year to overall growth. The only other factor of importance is net intraprovincial migration, the difference between people moving to Peel Region from other parts of Ontario and residents leaving Peel Region to go live elsewhere in Ontario. In the last five years, more people leave Peel Region for other parts of Ontario than come to Peel Region from other parts of Ontario. This net difference has more than doubled, from 10,419 in 2015/2016 to 24,699 in 2019/2020. (Net interprovincial migration, movement in and out of Peel Region and another province, is much smaller, never more than 1,500, and year to year can be net positive or net negative.)



Chart 1: Components of population change, Peel Region, 2015-16 to 2019-2020

Immigrants

Net interprovincial migration

Natural increase

Net change

In Halton Region (Chart 2), each of these various components contribute positively to growth: immigration (3,600 to 5,500 per year); natural increase (1,800 to 2,500); net intraprovincial migration (1,800 to 5,200) and interprovincial migration (50 to 560).



Chart 2: Components of population change, Halton Region, 2015-16 to 2019-2020

Net intraprovincial migration

- Net interprovincial migration
- Immigrants
- Natural increase
- Net change

Statistics Canada, Table 17-10-0140-01

Demographic profile of population

The population pyramids in Charts 3 and 4 illustrate the distribution of the population by age segments and gender.

Peel Region (Chart 3) shows a considerable bulge among those aged 20-34 years old. This segment makes up 24.2% of Peel's population, whereas in Halton Region, this segment represents a distinctly smaller proportion of its population and accounts for only a 18.0% share. On the other hand, Halton Region's bulge occurs across the 40-54 years old age range, accounting for 22.2% of Halton's population, compared to 19.6% in the case of Peel.

On July 1, 2020, the estimated average age of all Peel Region residents was 38.6 years old and for Halton Region it was 40.0 years old, both lower than the Ontario average of 41.3 years old.



Chart 3: Population distribution by five-year age groups and gender, Peel Region, July 1, 2020

Statistics Canada, Table 17-10-0139-0



Chart 4: Population distribution by five-year age groups and gender, Halton Region, July 1, 2020

Statistics Canada, Table 17-10- 0139-01



4. Overview of the Labour Market

The COVID pandemic, together with the accompanying lockdowns and precautions, upended our economy and labour market in a way that we have not seen since the Great Depression in the 1930s. In this section, we will provide a picture of its impact, as it existed at the end of December 2020. The situation continues to evolve, however, there are clear trends in terms of how population groups and industries were affected.

To carry out this analysis, it is necessary to rely on the data that is available. For basic unemployment data, there is Statistics Canada monthly Labour Force Survey data. For more detailed labour force characteristics and employment data by industry and occupation, the data is presented as threemonth moving averages. Because it is a survey and has a limited sample size, for smaller geographies Statistics Canada makes the Labour Force Survey sample more robust by averaging the results across three months, so that the reported figure for May is the average of the data for March, April and May. A three-month moving average will therefore have a time delay in terms of the impact of

changes in any given month and it will also dampen the impact of any given month because that month's numbers are averaged with two other months. These are caveats to keep in mind when reviewing the following data, some of which relies on three-month moving averages.

Monthly unemployment rate

Table 10 provides the monthly unemployment rates for the Toronto Census Metropolitan Area (CMA)² and for the rest of Ontario minus the Toronto CMA numbers. There is less point comparing the Toronto CMA data to that of all of Ontario because the Toronto CMA accounts for almost half (48%) of Ontario. It makes for a far more accurate contrast to compare the Toronto CMA to the rest of Ontario after the Toronto CMA numbers have been taken out. Indeed, on many labour market issues, the Toronto CMA is distinct from the rest of Ontario, as was the case with COVID, when restrictions were in place longer in the City of Toronto and Peel Region than in most other parts of the province. (The figures in Table 10 are illustrated in Chart 5.)

|--|

Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
REST	OF ONTA	RIO									
5.4%	5.6%	8.3%	11.4%	12.2%	10.4%	9.8%	10.1%	7.5%	7.3%	6.9%	7.1%
TORONTO CMA											
5.0%	5.4%	7.8%	11.2%	15.8%	14.4%	14.9%	13.7%	10.8%	10.3%	9.9%	10.1%

Statistics Canada, Table 14-10-0017-01 and Table 14-10-0294-01

² The Toronto CMA encompasses the City of Toronto, York Region, Peel Region, all of Halton Region except Burlington, a portion of Durham Region (Pickering, Ajax and Uxbridge), together with New Tecumseth and Bradford West Gwillimbury (Simcoe County) and Mono (Dufferin County). Through the first four months of the year, the unemployment rates for the rest of Ontario and for the Toronto CMA moved in tandem, with the rate for the rest of Ontario being slightly higher. As COVID was taking hold, the unemployment rate rose, starting with the lockdown announced in mid-March and spiked much higher for the Toronto CMA, with the Toronto CMA having an unemployment rate around 3% or more higher than the rest of Ontario for the rest of the year.



Chart 5: Monthly unemployment rates, Toronto CMA and the rest of Ontario, 2020

Statistics Canada, Table 14-10-0017-01 and Table 14-10-0294-0

Participation rate, three-month moving average

The participation rate measures the proportion of the potential working population (everyone aged 15 years or older) who are either employed or actively looking for a job. Table 11 provides the participation rate for males and females in the Toronto CMA over the last year for those aged between 15 and 55 years old (Chart 2 shows the data). Table 12 and Chart 7 provides the same data for the rest of Ontario.

Table 11: Participation rate, three-month moving average, males and females aged 15-55years old, Toronto CMA, 2020

Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Male pa	articipati	ion rate									
80.7%	80.2%	79.5%	77.2%	75.6%	76.6%	79.9%	83.0%	83.9%	83.4%	82.9%	82.2%
Female	particip	ation rat	te								
75.3%	75.2%	73.3%	69.9%	68.5%	70.3%	73.9%	76.1%	76.4%	76.4%	75.8%	75.2%
Differer	nce betw	veen ma	le and fe	male pa	rticipatio	on rates					
5.4%	5.0%	6.2%	7.3%	7.1%	6.3%	6.0%	6.9%	7.5%	7.0%	7.1%	7.0%

Statistics Canada, Table 14-10-0095-01

Table 12: Participation rate, three-month moving average, males and females aged 15-55 years old, rest of Ontario, 2020

Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Male participation rate											
81.8%	83.5%	80.7%	73.9%	81.2%	88.8%	88.6%	87.4%	83.4%	82.4%	83.9%	83.6%
Female	Female participation rate										
78.1%	77.6%	72.0%	66.5%	74.9%	81.1%	80.5%	79.9%	76.6%	78.0%	77.6%	77.6%
Difference between male and female participation rates											
3.7%	5.9%	8.7%	7.4%	6.3%	7.7%	8.1%	7.5%	6.8%	4.4%	6.3%	6.0%

Statistics Canada, Table 14-10-0017-01

It would appear that while the pandemic caused the unemployment rate to rise more sharply in the Toronto CMA, in the rest of Ontario the impact was felt as a deeper drop in the participation rate. The difference is made clear by the contrasting trends illustrated in Charts 6 and 7. In addition, in both the Toronto CMA and the rest of Ontario, the gap in the participation rate between males and females widened during the peak of the pandemic. This is likely due to the fact that women were employed in industries more likely to have shut down during the lockdown and, for those with school-age children, were more likely to take on child-minding and teaching roles as childcare centres and schools experienced their restrictions and/or reduced in-person attendance.



Chart 6: Participation rate, three-month moving average, males and females aged 15-55 years old, Toronto CMA, 2020

Statistics Canada, Table 14-10-0095-01

Chart 7: Participation rate, three-month moving average, males and females aged 15-55 years old, rest of Ontario, 2020



Statistics Canada, Table 14-10-0017-01

Unemployment rate by age, three-month moving average

As certain industries are most affected by the pandemic, youth who typically work in these industries in greater numbers were especially affected. Table 13 and Chart 8 provide the monthly unemployment rates through 2020 for male and female youth (15-24 years old) and compare it to the unemployment rate for male and female adults aged 25 years and older. By way of comparison, Chart 9 illustrates the same results for the rest of Ontario.

Historically, the youth unemployment rate tends to be around twice as high as the

unemployment rate for adults. Through the early months of the year, that pattern held. But by June and July was around two-anda-half to three-and-a-half times as high, and for male youth the rate spiked to four times that of male adults. As unemployment rates, started coming down, the rate for female youth has stayed stubbornly high, in the upper 20% range. Female adults also saw their unemployment rate increase more relative to male adults at the height of the lockdown, but their rates converged by the end of the year.

Table 13: Unemployment rate, three-month moving average, by age groups and gender,Toronto CMA, 2020

Jan	Feb	Mar	Apr	Мау	June	July	Aug	Sept	Oct	Nov	Dec
MALES	MALES										
15-24 y	ears old	l									
9.4%	11.0%	12.9%	18.1%	26.6%	33.2%	37.0%	36.2%	34.4%	28.7%	24.2%	20.9%
25 year	rs and ol	der									
4.4%	4.3%	5.0%	6.5%	8.6%	9.5%	9.7%	8.9%	8.6%	7.9%	7.6%	7.9%
Ratio o	of youth u	unemplo	yment ra	ate to ad	lult unen	nployme	nt rate				
2.1	2.6	2.6	2.8	3.1	3.5	3.8	4.1	4.0	3.6	3.2	2.7
FEMAL	.ES										
15-24 y	ears old	l									
9.7%	8.6%	11.3%	15.8%	28.0%	34.6%	35.3%	32.2%	30.1%	30.0%	28.7%	27.9%
25 year	25 years and older										
4.3%	4.5%	5.6%	7.4%	10.6%	12.6%	13.4%	12.9%	11.1%	9.6%	8.2%	7.8%
Ratio o	of youth u	unemplo	yment ra	ate to ad	lult unen	nployme	nt rate				
2.3	1.9	2.0	2.1	2.6	2.8	2.6	2.5	2.7	3.1	3.5	3.6

Statistics Canada, Table 14-10-0095-01



Chart 8: Unemployment rate, three-month moving average, by age groups and gender, Toronto CMA, 2020

By comparison, the rest of Ontario (Chart 9) showed lower levels of unemployment across all categories and while youth unemployment also rose to triple that for adults, the level did

not rise over 30%. In addition, there was less of a gap between the male and female rates, certainly for adults and for most months for youth as well.





Statistics Canada, Table 14-10-0017-01

Unemployment rate by immigration period, three-month moving average

The unemployment rates by immigration period and for Canadian-born are listed in Table 14 and illustrated in Chart 10. The data is a three-month moving average for the Toronto CMA and is focused on prime working age adults (25-54 years old), to remove the additional unemployment experienced by youth.

The usual pattern for unemployment rates by immigration period and for Canadian-born is as follows: the most recent immigrants have the highest unemployment rate, followed by the next most recent cohort and then the one after that, and Canadian-born tend to have the lowest unemployment rate. It has been the case, in recent years, that immigrants who have been in Canada for ten years or more will experience an unemployment rate very similar to someone who was born in Canada. In the first part of the year, the unemployment rates continue to follow the usual pattern: in January, the unemployment rate for Canadian-born adults was 3.7%, while that for the most recent newcomers was more than twice that, at 8.8%. Starting in September, two trends emerged. Firstly, the unemployment rate for immigrants who had been in Canada for more than 10 years converged to the same level as that for Canadian-born. Secondly, the unemployment rate for recent immigrants (less than 5 years) dipped below that for immigrants who have been in Canada for 5 to 10 years, whose unemployment rate actually increased in December and was 3.5% percentage points above that forrecent newcomers. In addition, while the participation rate for all groups declined in April and May, it generally recovered for the other categories except for immigrants who have been in Canada for 5 to 10 years, whose participation rate in December remained around three percentage points below what it was in January.

Table 14: Unemployment rate, three-month moving average, immigrants andCanadian-born, residents aged 25-54 years old, Toronto CMA, 2020

Jan	Feb	Mar	Apr	Мау	June	July	Aug	Sept	Oct	Nov	Dec
Immigra	Immigrants, landed 5 or less years earlier										
8.8%	8.4%	10.2%	11.9%	15.3%	16.3%	17.6%	13.7%	10.7%	7.9%	8.8%	8.2%
Immigra	Immigrants, landed more than 5 to 10 years earlier										
5.5%	6.3%	7.4%	9.3%	11.9%	13.7%	14.1%	13.1%	11.0%	10.3%	10.3%	11.7%
Immigra	Immigrants, landed more than 10 years earlier										
4.6%	4.9%	5.8%	7.6%	10.3%	12.2%	12.0%	11.0%	9.5%	8.5%	7.7%	7.6%
Born in Canada											
3.7%	3.3%	4.0%	5.3%	8.1%	9.6%	10.7%	10.4%	9.8%	8.7%	7.7%	7.3%

Statistics Canada, Table 14-10-0082-01







Employment by industry, three-month moving average, Toronto CMA

The pandemic affected different industries in varying ways. The following charts illustrate the impact on several industries, comparing the Toronto CMA with the rest of Ontario. In order to illustrate the comparisons, the January employment level is given a value of 100 and each subsequent month is expressed in relation to the January figure. Each of the charts below is scaled to the same values, so that one can also easily make comparisons between the industries.

By far, Accommodation & Food Services has been the industry hardest hit by the pandemic, both in terms of the largest employment losses as well as the lingering consequences of the lockdown and adherence to social distancing.





Statistics Canada, Table 14-10-0091-01 and Table 14-10-0097-01

In June, the three-month moving average for employment in the Accommodation & Food Services sector dropped to half of what it was in January in the Toronto CMA (51 compared to 100), considerably lower than the still dismal figure of 61 for the rest of Ontario (Chart 11). By December, the proportions for both areas had only risen back to the 78 to 79 range. Other industries which were in the low 80s in December in the Toronto CMA were Public Administration (80), Transportation & Warehousing (81) and Business, Building and Other Support Services (this includes temp agencies, janitorial and cleaning services, and landscaping).

Almost every industry in the Toronto CMA at some point during 2020 saw their threemonth moving average employment number drop below the level that was present in January. Nevertheless, some industries were above their January figure by December, and these consisted of: Manufacturing; Wholesale & Retail Trade; Professional, Scientific & Technical Services; Educational Services; and Information, Culture and Recreation (for the purposes of the Labour Force Survey, this category combines two industries: Information and Cultural Industries did well, but Arts, Entertainment & Recreation did very poorly).

Manufacturing experienced a drop in employment during the first lockdown, less so in the Toronto CMA compared to the rest of Ontario (Chart 12). By August, Manufacturing appears to have recovered its job losses in the Toronto CMA, whereas it took until November for the losses to be made up in the rest of Ontario.



Chart 12: Number of employed, Manufacturing industry, three-month moving average, Toronto CMA and the rest of Ontario, January to December 2020 (January = 100)

Statistics Canada, Table 14-10-0091-01 and Table 14-10-0097-01

It is worth looking more closely at the Construction industry because it highlights how looking only at data for Ontario obscures how industry and employment dynamics operate differently in the Toronto CMA and the rest of Ontario.

If one relied only on Ontario data, one would conclude that the Construction industry in Ontario lost some jobs through May and June but essentially recovered by December (the red line in Chart 13). However, when one unpacks the data for the Toronto CMA and the rest of Ontario, one can see that the losses were much more pronounced in the Toronto CMA and the employment level in December was only at 87, considerably below the level in January (orange line). On the other hand, employment in the rest of Ontario only dipped slightly, then picked up considerably in the latter half of the year, staying above the level in January from July through December (blue line).



Chart 13: Number of employed, Construction industry, three-month moving average, Toronto CMA and the rest of Ontario, January to December 2020 (January = 100)

Statistics Canada, Table 14-10-0091-01 and Table 14-10-0097-01

Employment by occupation, threemonth moving average, Toronto CMA and rest of Ontario

Occupations can be classified according to the education level typically required to qualify for that occupation. The National Occupational Classification divides all jobs into four such categories:

- Jobs usually requiring a university degree (for example: lawyers, accountants, nurses)
- Jobs usually requiring a college diploma or a trades certificate (for example: computer network technicians, medical laboratory technologists, early childhood educators, electricians, auto service technicians)
- Jobs usually requiring a high school diploma (for example: general office clerks, home support workers, retail salesclerks, material handlers, transport truck drivers)
- Jobs which require no educational certificate (for example: cashiers; shelf stockers; food counter attendants; general labourers in construction or manufacturing)

The pandemic affected these categories in different ways and the impact also varied somewhat between the Toronto CMA and the rest of Ontario (Charts 14 and 15). Overall, jobs requiring a university degree were hardly affected, with very limited losses and then employment growth through the fall and early winter.

All other categories experienced notable job losses through April, May and June, particularly in the Toronto CMA. In both areas, jobs requiring a college/trades certificate or a high school diploma recovered somewhat, but in December still stood between 94 and 97 on the scale where 100 represented the employment level in January.

In the Toronto CMA, jobs requiring no certificate recovered somewhat through August, but then tumbled again, closing out the year at 83 in comparison to January's 100. In the rest of Ontario, the recovery continued past August and in December had returned to the employment level that was present in January.



Chart 14: Number of employed by level of education of occupation, three-month moving average, Toronto CMA, January to December 2020 (January = 100)

Statistics Canada, Table 14-10-0311-01 and Table 14-10-0313-01







Job permanency, Ontario

Certain labour force data is only available at the provincial level. Job permanency refers to two types of job arrangements: a permanent job has no pre-determined end date; a temporary job has a pre- determined end date and includes: seasonal; temporary, term or contract, including work done through a temporary help agency; casual job; and other temporary work. Approximately 12% to 13% of Ontario's workers over the last three years have been employed in temporary jobs (over 30% of youth are employed in temporary jobs and less than 10% of workers aged 25 years or older). Peel Region in particular has a very high proportion of temporary employment agencies among its businesses and so this analysis is of particular relevance, to a lesser extent for Halton Region.

Chart 5 illustrates the relative changes in the number of permanent and temporary jobs in Ontario during the pandemic. The number of jobs for each of the permanent and temporary categories in January is given a value of 100 and each subsequent month is given a value in relation to the number of jobs in January (for example, a value of 95 would mean that the number of jobs were 95% of the figure in January).

As one can see, there was a far greater proportional decline in the number of temporary jobs as opposed to permanent jobs at the start of the pandemic. In part, employers were likely more inclined to shed temporary workers rather than permanent workers, where they had the choice. The rebound in temporary worker employment may in part have been due to increased seasonal hiring in the latter part of the summer after restrictions were relaxed, as well as in part a consequence of employers engaged in tentative hiring, given the uncertain economic situation.



Chart 16: Monthly employment by permanent and temporary jobs, Ontario (January = 100)

Statistics Canada, Table 14-10-0071-01

Long-term unemployment, Ontario

Another set of data which is only available at the provincial level, measures the length of time during which individuals stay unemployed. With the onset of a recession, not only does unemployment increases, but the proportion of those who remain unemployed for a longer period of time increases and this circumstance continues for some time after a recession. Chart 17 illustrates the trend in long- term unemployment (that is, individuals being unemployed for six months or more) before and after the 2008 recession.





Statistics Canada, Table 14-10-0057-01



Chart 18: Percent of long-term unemployed (unemployed for six months or more), Ontario, January-December 2020

Statistics Canada, Table 14-10-0342-01

Chart 18 provides the data for long-term unemployed in 2020 for Ontario, from January to December. When the pandemic hit in March, such a large number of individuals became unemployed that, on comparing with the percentage who had been unemployed for six months or more dropped, because this was now a smaller fraction. But within a few months, as the unemployment numbers started falling somewhat, the share of the long-term unemployed rose quite sharply starting in September, six months after March. In December, the proportion of long-term unemployed stood at 32.8%. A few points to consider:

- At this stage, the number of long-term unemployed can be expected to increase during 2021, for even as a recovery takes hold, individuals who have been unemployed for a longer period of time will have challenges getting re-hired;
- The experience of previous recessions shows us that it will take a number of years for the proportion of long-term unemployed to drop;
- All of which means that employment service providers can expect to see a larger number of long-term unemployed among their clients in 2021 and beyond.

5. Highlights from employer survey 2020

The impact of COVID-19 on our local labour market was the focus of the 10th annual survey of employers carried out by PHWDG.³ The survey attracted over 700 employers, with an average response of 561 answers per question, from a crosssection of employers in Peel and Halton Regions, as well as from surrounding areas. The survey sample of employers was skewed toward larger employers, with approximately 6% of Peel and Halton employers with 100 or more employees responding to the survey. The survey was carried out between mid-September and mid-October 2020.

While the COVID pandemic affected all of us and had an extraordinary impact on our economy, individual businesses and employment, the fall-out was experienced in diverse ways and to varying degrees. Different establishments had varying proportions of essential workers as well as varying capacities to shift to remote work or delivering their products and services on-line. As a result, the range of coping strategies open to an employer varied by the size of their operation and by their industry. And while employers pivoted to on-line platforms or reliance on more employees working from home in response to the pandemic, some of these adaptations will likely continue even after this crisis has passed.

According to a Statistics Canada survey, only four in ten businesses in Ontario were able to stay fully operational throughout the lockdown that spanned the spring and summer months. Two industries that were most affected were Arts, Entertainment & Recreation (cinemas, gyms, galleries, spectator sports) and Accommodation & Food Services.

According to the PHWDG survey, employers differed significantly in the proportion of essential workers who made up their workforce. 29% of respondents had a workforce which consisted of 10% or fewer essential workers, while 43% had a workforce which was made up of 90% or more essential workers.

Small firms (1-4 employees) had a smaller proportion of essential workers. Industries with a high proportion of essential workers included: Transportation & Warehousing; Manufacturing; Wholesale Trade; Health Care & Social Assistance; Food Services; and Retail Trade.



³ The full survey report, as well as previous reports, can be found at the PHWDG website, under Labour Market Resources – Employer Surveys. The direct link is: https://www.peelhaltonworkforce.com/wp-content/uploads/2021/02/GTA-Employer-Survey-2020.pdf.

The most common strategy relied upon by employers in response to the lockdown was having employees work from home, followed by delaying any hiring. The third most common strategy was reducing the size of their workforce.

There was a strong correlation between industries that increased their workforces and that increased their wages, evidently a sign of increasing demand for their services. These industries were: Health Care & Social Assistance; Retail Trade; and Transportation & Warehousing. Yet these industries had wildly different outcomes among their subsectors (for example, between essential stores like grocery stores and non-essential stores like clothing stores).

Employers in Professional, Scientific & Technical Services were most likely to have their employees work from home, as were employers with 100 or more employees, while firms in Food Services and Retail Trade were least likely to rely on this strategy.

In terms of other actions undertaken, the most common response was making use of the Canada Emergency Wage Subsidy. Less than half of the respondents to the survey said they did not use this support, while the majority said they used it a little or to a greater extent.

Employers were next asked about the postpandemic period and whether they expected to allow more employees to work from home than was the case before the pandemic. A familiar pattern repeated itself: firms in Professional, Scientific & Technical Services as well as in Wholesale Trade were more likely to support continuing telecommuting; firms in Accommodation & Food Services, as well as in Retail Trade, were much less likely to consider more employees working from home.

There was a high degree of adaptation to the circumstance of employees working from home. For those employers who indicated that after the pandemic they would be allowing more employees to telecommute, the majority were taking steps to support this transition. When asked about such measures, two-thirds of these employers said they had already or were in the process of:

- Investing in enhanced technology services;
- Revising policies regarding health and safety;
- Instituting new practices to promote team cohesion and communications;
- Adopting flexible workhour arrangements.

On the other hand, only slightly more than a third were providing financial aid to support employees working from home.

As a result of the lockdown, employers were slightly more likely to have reduced their workforce, particularly among nonessential workers, according to the survey, and employers' three month forecast for employment (in August) also slightly tilted towards a reduced workforce. This was especially the case for Arts, Entertainment & Recreation and for Food Services.

When asked about the composition of their workforce, while the net effect was a slight decrease, it was most pronounced in relation to permanent employees, consultants and temp workers, while there was an expectation that more contract workers would be hired.

Overall, employers indicated that the major challenge brought on by the pandemic was trying to manage through the uncertainty, both in terms of the pandemic itself as well as its impact on the economy. A second level of concern related to dealing with the stress and mental health impacts on employees, as well as balancing health and safety measures with the need to generate revenue.

Moving forward, a clear majority of employers expect to place a greater reliance on on-line platforms and applications. A somewhat smaller plurality forecast that this will increase the skill requirements expected of workers, whereas slightly more employers disagreed as opposed to agreed that increased use of technology would reduce the demand for labour. However, among large firms (100 or more employees) a larger proportion do indeed believe that greater use of technology will reduce their labour needs.

In the aftermath of the lockdown and the changes brought about, more than half of employers felt that soft skills are now more important and, at the same time, that digital skills are also now more important. More than half of employers have placed greater reliance on virtual interviews. A larger number (though less than half) were giving more weight to a job candidate's understanding of and adherence to health and safety procedures, as well as to their ability to work from home. On the other hand, most employers were not recruiting from a wider geographic area, even with the shift to more remote work, nor were employers relying more on external agencies to screen job candidates.

On average, most employers were managing their various HR functions. The one HR area which ranked highest in concern was addressing stress and mental health issues among employees.

The overall mood of employers is one of concern and worry. This is particularly the case among employers in the Arts, Entertainment & Recreation sector, the Food Services sector and among small establishments (1-4 employees). The only employer category which expressed a somewhat positive note was among the Professional, Scientific & Technical Services sector.

When asked to volunteer comments, a number of employers cited the on-going need for financial support while business activity remains slow or expressed concern about an uncertain future, as well as about the challenges of recruiting workers.



The survey reveals the numerous adaptations that employers relied upon, from having employees work from home to making use of various technological supports to stay engaged with customers. There were also various impacts on employment and on HR practices. It is apparent that some of these changes will stay in place and be expanded upon. As in many other respects, when we return to normal, it will be a new and different normal.

The issue of working from home varied considerably by industry and by the proportion of workers who were essential and non-essential. There is considerable potential for this practice to continue even after the pandemic has passed, which will have considerable implications in a number of respects, including for employees, for commercial realty, for commuting, and for services that support workforces operating out of offices. This will require ongoing monitoring.

6. Employment Ontario Support Services

This section provides information and analysis of client data released by Employment Ontario in 2020 and offers insights into client demographics and outcomes between April 2019 and March 2020. Please note that the client data and analysis is provided at the Peel and Halton regions level.

Employment Services Highlights

- 82,241 residents were serviced by EO Employment Services providers in 2019-2020, an increase of about 6.4% from the previous period.
- 18,384 residents received one-on-one assistance (Assisted Clients) regarding their job search, a decrease of about 1.5%.
- **63,857** residents or about **9.6%** more than the previous period were identified as unassisted clients.
- 86% of the clients were unemployed,
 5% were underemployed and 4% were employed part time. The rest were either self-employed, employed full time or were full and part-time students.
- 64% of clients had no source of income, 8% were receiving Employment Insurance (El) benefits and 9% were Ontario Works recipients.
- 11,022 or 60% of assisted clients were 25-44 years old, 4,597 or 25% were in the 45-64 age range, while another 2,535 or 14% were 15-24 years old. The remainder 1% were 65 years of age or older.

Profile of Employment Ontario Clients

Chart 19: The distribution of clients by age group



Profile of Employment Ontario Clients

Compared to the previous reference period the number of clients in the prime working age has increased while that of youth has decreased by 23%, indicating that youth have started to use Employment Ontario (EO) services less. Meanwhile, the percentage of older workers entering as EO clients has slightly decreased since the last reporting period.

The share of female clients using the services was higher than males. 54% of the clients were females and 46% males.

Substantial increase in the use of services is recorded among some Designated Groups year over year. Compared to the previous reporting period more clients from the following groups have accessed assisted services:

- 22% more Newcomers
- 12% more Persons with Disabilities 8% more Aboriginals
- 7% more Internationally Trained Professionals
- 3% more Francophones

10000 9000 8000 7000 6000 5000 4000 3000 2000 1000 0 Internationally Newcomers Visible Person with Francophone Aboriginal Deaf Trained Minority Disability Group Professionals 2018-2019 8310 5534 2533 1342 289 85 12 2019-2020 8906 6724 1831 1505 298 92 0

Chart 20: The distribution of clients by the designated groups

Ministry of Labour, Training and Skills Development, Employment Ontario

Meanwhile, 28% less Visible Minorities used these services. These changes can be seen in the chart below. (It should be noted that the figures for Visible Minorities under-represent the actual numbers, as the data relies on selfidentification.)

The Employment Ontario data also profiles the educational attainment of clients at intake. The majority of ES clients or 31% had completed an Applied/Associate or Bachelor degree, 25% had a Certificate Diploma and 20% had completed Secondary Education. The high number of clients with a degree can be related to high number of Newcomers that are using the ES in order to enter the labour market.



Chart 21: The distribution of clients by education levels of the clients at intake

Ministry of Labour, Training and Skills Development, Employment Ontario

Employment Outcomes of Serviced Clients

The employment outcomes of clients during the reporting period indicate that the proportion of individuals finding a job in their field of choice or pursuing education or training increased by 9% compared to 2018-2019. About 12,887 or 70% of clients secured a job and 11% pursued further training or education. Although the share of those that secured a full time job was 33% it should be noted that this category of clients decreased by 7% compared to the previous period. Meanwhile the number of clients that remained unemployed after intake decreased by 3% compared to 2018-19.

Employment Ontario has made available data about the occupations and the industry the client was previously employed in, together with the occupation and industry employed at a detailed 2-digit NOC and NAICS level respectively. The following tables highlight the top 10 occupations and industries for both.



Chart 22: The distribution of clients by the employment outcomes of clients

(2 Digit NOC) Lay – Off Occupation Top 10- Peel & Halton	(2 digit NOC) Employed Occupation Top 10—Peel & Halton
12: Administrative and financial supervisors and administrative occupations	65: Service representatives and other customer and personal services occupations
21: Professional occupations in natural and applied sciences	12: Administrative and financial supervisors and administrative occupations
14: Office support occupations	14: Office support occupations
11: Professional occupations in business and finance	96: Labourers in Processing, Manufacturing and Utilities
01: Specialized middle managers occupations	64: Sales representatives and salespersons - wholesale and retail trade
65: Service representatives and other customer and personal services occupations	21: Professional occupations in natural and applied sciences
96: Labourers in Processing, Manufacturing and Utilities	74: Other installers, repairers and servicers and material handlers
64: Sales representatives and salespersons - wholesale and retail trade	22: Technical Occupations Related to natural and applied sciences
22: Technical Occupations Related to natural and applied sciences	67: Service support and other service occupations
40: Professional occupations in education services	11: Professional occupations in business and finance

Table 15: Top	10 occupations	and industries	for NOC and NA	ICS in Peel and	d Halton
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Ministry of Labour, Training and Skills Development, Employment Ontario

Table 16: Top 10 occupations and industries for Lay-Off Industry and Employed Industry in Peel and Halton

Lay – Off Industry (2 digit NAICS) Top 10 – Peel & Halton	Employed Industry (2 digit NAICS) Top 10 – Peel & Halton
54: Professional, Scientific, and Technical Services	56: Administrative and Support and Waste Management and Remediation Services
56: Administrative and Support and Waste Management and Remediation Services	54: Professional, Scientific, and Technical Services
62: Health Care and Social Assistance	62: Health Care and Social Assistance
44: Retail Trade	44: Retail Trade
61: Educational Services	33: Manufacturing
52: Finance and Insurance	72: Accommodation and Food Services
72: Accommodation and Food Services	52: Finance and Insurance
81: Other Services (except Public Administration)	45: Retail Trade
33: Manufacturing	23: Construction
23: Construction	81: Other Services (except Public Administration)

Literacy Basic Skills Services

A total of 3117 clients used Literacy and Basic Skills services (LBS) in the Peel and Halton areas during 2019-2020. 49% of all Literacy Basic Skills learners were of prime working age 25-44 years old, 29% were youth, 20% were 45-64 years old and the rest were 65 years and older. The highest proportion of LBS learners among the designated groups was made by Newcomers (42%) and by Persons with Disabilities (27%) followed by Visible Minorities (21%). Compared to the previous period 13% more newcomers used the LBS services.

31% of the total number of LBS learners had completed Secondary Education and 22% had Less than Grade 12 level of education and an additional 15% had an Applied/ Associate/Bachelor Degree. About 56% of LBS learners were unemployed and 32% had no source of income. Almost 39 % of those clients that participated in these programs identified post-secondary education as a goal, 27% identified Employment as a goal while only 7% Apprenticeship. About a third of the clients learned about the services through word of mouth or some sort of media referral, while 310 clients were referred by Employment Service providers and only 154 by LBS service providers.

Second Career Services

Employment Ontario data indicates that the number of Second Career participants in 2019-2020 decreased by 22% over the previous reporting period, down to 270 participants. Transport Truck Driver and Social and Community Service Worker topped the list as the most common Second Career training option followed by Medical Administrative Assistants. At the end of the program, 43 participants were employed (19 in full-time jobs, 13 in part-time jobs), while 12 months after theprogram, 104 were employed. For clients for which outcome data is provided (including "Unknown" outcome), this represents 34% being employed after one year, compared to the provincial average of 49%.

Second Career Top 5 Skills Training Programs in Peel & Halton						
2018-2019	2019-2020					
Transport Truck Drivers	Transport Truck Drivers					
Computer Network Technicians	Social and Community Service Workers					
Medical Administrative Assistants	Medical Administrative Assistants					
Social and Community Service Workers	Early Childhood Educators and Assistants					
Early Childhood Educators and Assistants	Electricians (Except Industrial and Power System)					

Table 17: Top 5 Skills Training Programs in Peel & Halton in 2018-19 & 2019-20

Youth Services

 The Youth Job Connection program served 1248 youth, of which 81% were aged 15 to 24. About 987 of these young people, who had no source of income had experienced multiple and/or complex barriers to employment and were provided with more intensive supports beyond traditional job search and placement opportunities.

Canada Ontario Job Grant

 304 employers received the Canada-Ontario Job Grant (the Job Grant). This grant provided direct financial support to individual employers to train a total of 1,907 employees. 66% of employers were small businesses employing less than 50 employees, 17% employed 50-150 employees and only 7% were large businesses. The outcomes were quite positive and all employers reported that training met their workforce needs.

Apprenticeship

- There were 7,484 Active Apprentices during 2019-2020, an increase of 3% compared to 2018- 2019. Meanwhile 7% less Certificates of Apprenticeship were issued as compared to the previous period and the number of New Registrations dropped by almost 3%. The number of registrants for modular training also decreased by 4%. The average age of apprentices at registration was 27 years old, the same as that in the previous period. The number of apprentices 45-64 years old increased by almost 11%. A 4% decrease was recorded for the 15-24 and 3% for the 25-44 years old apprentices.
- Apprenticeship continues to be dominated by males that made up 88% of the total number of apprentices.
- 91 % of the apprentices had completed Secondary Education.

Below is a list of Top 10 New Registrations in Trades. It becomes evident that the list of trades that got the highest number of new registrants remained almost the same compared to the previous period.

Trades – Top 10 New Registrations in Peel and Halton							
2018- 2019	2019- 2020						
Electrician - Construction and Maintenance	Electrician - Construction and Maintenance						
Automotive Service Technician	Automotive Service Technician						
Refrigeration and Air Conditioning Systems Mechanic	Truck and Coach Technician						
Hairstylist	Refrigeration and Air Conditioning Systems Mechanic						
Truck and Coach Technician	Hairstylist						
Industrial Mechanic Millwright	Plumber						
Plumber	Industrial Mechanic Millwright						
Construction Boilermaker	Residential Air Conditioning Systems Mechanic						
Child Development Practitioner	Child Development Practitioner						
Residential Air Conditioning Systems Mechanic	Industrial Electrician						

Table 18: Top 10 New Registrations in Trades in Peel and Halton during 2018-19 & 2019-20

7. Consultation Process

The Peel Halton Local Labour Market Plan (2021-2024) has been developed through a comprehensive review and consultation process.

Part 1: A comprehensive review of current local labour market information and data, and a review of completed research and analysis undertaken by the PHWDG over the past 12 months, was completed. From this analysis, seven strategic priorities for local employers, the labour force, economic development, industry and education were identified, including:

- 1. Raising digital skills
- 2. Challenges relating to recruiting entry-level workers
- 3. Mental health challenges for employers and employees arising from the pandemic
- 4. Youth who are and will be affected by the disruption caused by the pandemic
- 5. Forecasting labour market trends in the post pandemic period
- 6. Re-skilling
- 7. Skilled trades

Part 2: These strategic priorities were shared with a broad range of community stakeholder groups, represented by over 100 contacts from employers, employment Ontario service providers, community service providers, municipal economic development, post-secondary education institutions, boards of trade, and industry groups. These individuals were engaged in 6 community consultation discussions, each with a specified target audience. These included:

- Employment Ontario and other Employment Service Providers, including the SSM
- 2. Settlement Service Providers
- 3. Manufacturing Employers
- 4. Small and Medium Size Business Employers
- 5. Post-secondary Education Institutions
- 6. Economic Development and Business Associations

The consultation sessions focused on three key discussions:

- 1. A review and confirmation of the strategic priorities
- 2. Identification of proposed action items
- Identification of action item leads and community partners

Part: 3: Upon completion of the consultation process, all findings and proposed actions were shared back to the participants for review and confirmation of intent, action, support, and partnerships. This process confirmed the proposed and planned actions for the LLMP that are presented here.

8. Action Plans 2021-2022

Raising Digital Skills: employers have an increasing expectation that workers will have a basic level of digital literacy and skill set to support their engagement and success in the contemporary workplace. Employers in Peel and Halton have expressed concern that not all segments of the available labour force possess the immediate basic digital skills required for the positions that they have available.

Action	Lead	Potential Partners	Outcome	Timeframe
The Elevate Program: providing digital upskilling and critical support to newcomer women seeking employment and career growth	ACHĒV	PHWDG; EO/ES Providers; Settlement Services; Employers; Employer Groups; Boards of Trade; Education Inst.	Newcomer work in Peel and Halton are able to access new opportunities and reach their career goals	Ongoing between 2021 and 2023



Challenges Relating to Recruiting Entry-Level Workers: Employers in Peel and Halton have increasingly expressed concern with their ability to recruit and retain entry-level workers. This is particularly the case for employers in manufacturing and warehousing industries.

Action	Lead	Potential Partners	Outcome	Timeframe
Entry level opportunities marketing campaign to non-traditional/ non-labour force markets (re-engagement)	PHWDG	Social Service (OW/ ODSP); Economic Development; Boards of Trade; EO/ES Providers; Youth Serving Organizations	A series of marketing pieces and resources that encourage individuals to enter or re-enter the labour market	TBD based on funding application
Virtual job fair for entry level healthcare job opportunities in Halton	Halton Region - Employment Services	Job Skills; PHWDG; EO/ES Providers; Employers; Settlement Service Providers; Youth Serving Agencies;	Career awareness events are held across Peel and Halton, connecting job seekers with in demand entry level opportunities.	TBD
Employment Preparation Program for General Labourers	PHWDG	Milton Chamber of Commerce; Sheridan College; Employers; Halton Region Employment and Social Services Division	A SkillsAdvance Ontario project which will prepare individuals with barriers to employment for jobs as general labourers in the manufacturing and logistics sectors in Milton, in this way addressing a labour shortage which has been a major challenge for Milton employers.	April 1, 2021 to March 31, 2022
Youth Engagement in Advanced Manufacturing: Provide a three tiered training program, including elearning with online instructors and face to face instruction, to individuals on the autism spectrum.	Spero Careers Canada	Work based learning consortium	Youth who are on the autism spectrum are provided with career training and pathways in local manufacturing. Candidates move successfully into full training program and gain equal opportunity for employment in advanced manufacturing.	Ongoing from April 2021 - dependant on funding

Mental Health Challenges for Employers and Employees Arising From the Pandemic: The pandemic has placed an increasing strain on employers and their employees, creating challenges for mental well-being of the workforce.

Action	Lead	Potential Partners	Outcome	Timeframe
A webinar series to educate and support employers /employees on how to understand and deal with workplace mental health.	Mandi Buckner Consulting Starting the Conversation	Sheridan College; PHWDG; Boards of Trade; Community Health Organizations; Ryerson University; EO Providers	Enhancing the current practices of employers by equipping both with the skills, knowledge and awareness that will improve productivity and engagement in a healthy workplace. Help build resilient employees by helping them achieve their goals for wellbeing	April 1, 2021 to March 31, 2022
Mental Health Training for Employers and Employees providing appropriate skills (including cultural factors) to the frontline staff for services and referrals related to mental health illnesses	PCHS	Employers Boards of Trade	Employers and employees have increased access to mental health training and resources	Between April 1, 2021 and March 31, 2022.

Youth Who Are and Will Be Affected by the Disruption Caused by the Pandemic: The disruptions to the labour market caused by the pandemic have been particularly hard on youth who are new to the labour market, and this will have a lasting impact on their career and future financial prospects.

Action	Lead	Potential Partners	Outcome	Timeframe
HireNext: supporting the development of youth-inclusive employers in Peel and Halton	CivicAction	PHWDG; Boards of Trade; Employers; EO Providers; Economic Development	Employers in Peel and Halton are more supportive and engaged with the youth workforce, providing new opportunities for career advancement.	Ongoing 2021-2022: local promotion campaign launched with partners

Forecasting Labour Market Trends in the Post Pandemic Period: There is an ogong need for on time, locally relevant labour market data and information, especially in the rapidly changing pandemic environment.

Action	Lead	Potential Partners	Outcome	Timeframe
Seamless Service Coordination: Web Portal: a clearinghouse for employment program and service information and best practices.	PHWDG	EO/ES providers, SSM	Improved access to shared service planning and knowledge capital, supporting improved community response to client and employer needs.	TBD based on funding application
Best Practices in Workforce Development Roundtable: To support the sharing of program and service models to support those furthest from the labour market.	PHWDG and EO Providers	EO/ES providers; Employers; PHWDG	Improved, cross organization information and resource sharing to improve outcomes for individuals who are furthest from the labour market	Initial planning meeting in 2021 with work plan and schedule TBD with lead partners
Employer Survey: to understand employer needs in the context of COVID-19 and the recovery	PHWDG	Employers; Employer Associations/Groups; local HRPAOs; municipal Economic Development offices; Peel SSM; ES partners; community colleges (Sheridan, Humber); local School Boards	Increased understanding of local labour market trends and issues from the perspective of local employers and industry groups in the post- pandemic context.	Annual: 2021-22 impacts of pandemic and post pandemic planning 2022-23 post pandemic outcomes and employment trends
Working in Peel Halton: Online portal and social media	PHWDG	Region of Halton, Economic Development Region of Peel; Economic Development Local Chambers of Commerce/Boards	Enhanced understanding of local labour market trends by municipality for economic development, employment service providers, employers and job seekers	Ongoing
Peel Halton Workforce Hub: Providing current reporting on industry and local economic trends at bi-monthly intervals	PHWDG	Economic Development offices in Peel & Halton	Increased access to real time industry and local economic and labour market information through the delivery of 6 comprehensive, industry reports	Ongoing 2021-2022: Set up

Re-Skilling: There is a growing demand in Peel and Halton for the re-skilling of workers who may be made available to employers from one industry to the next, if upgrading and reskilling can be undertaken.

Action	Lead	Potential Partners	Outcome	Timeframe
International Student Workforce Preparation: Webinar/ workshop series for international students studying at local institutions	BMG Group	EO Providers; Settlement Services; Education Institutions	International students in Peel and Halton have improved labour market access, opportunities and outcomes	Ongoing 2021-2022: Marketing and initial program enrollment
Micro Credentialing Development of locally relevant, industry led activities	Conestoga College	Local employers; EO/ES providers	Additional learning opportunities are provided for underemployed and unemployed individuals in Peel and Halton.	Ongoing 2021-2022 Continue to develop and build on micro- credentials after consultation with employers and industry experts.



Skilled Trades: There is an ongoing need in Peel and Halton for the attraction, training, and retention of skilled trades workers, especially in the manufacturing sectors.

Action	Lead	Potential Partners	Outcome	Timeframe
Apprenticeship Career Connections: an event to showcase skilled trades as a viable career path for youth, new immigrants, second career participants, and those re- entering the labour force.	PHWDG	Economic Development Trades Organizations; EO/ES Providers; Secondary and Post-Secondary Education; Employers Settlement Agencies; Youth Serving Agencies	Increased awareness of local apprenticeship career pathways and improved connections between youth, trades groups, industry, and education providers in support to skilled trades	TBD, subject to funding availability
Skilled Trades Video Series: Showcasing local career opportunities, directed toward secondary school students	Sheridan College	PHWDG; Trade Unions Employers; Post secondary and secondary education	Secondary school students are provided with detailed information on career pathways in the skilled trades.	2021 - funding proposal submitted
Best Practices in Co-operative Education for Manufacturing: Guidelines and peer support for manufacturing employers to engage and support secondary school experiential learning and co-op	Gord Nicholls (BMP Metals Inc.)	PHWDG; Secondary Education; Manufacturing Employers	Secondary school students build understanding, gain experience, and create connections to career paths in manufacturing and the skilled trades.	Start 2021: documentation of guidelines completed; identification of participating employers; development of peer support process.
Generation Links Project: Creating intergenerational mentorships in manufacturing trades to support the transfer of knowledge capital and career development of new entrants	Emercomm Business Consultants Inc.	PHWDG; Trade Unions; Post- secondary education institutions (Conestoga College); Manufacturing employers	New entrants in the manufacturing trades are provided opportunity for personal and professional development, while ensuring the transfer of knowledge capital	TBD

Appendix

List of participating organizations in Community Consultations Sessions for Action Plans

- Acara Solutions ACCES Employment Achēv BMG Group BMP Metals Inc. Burlington Economic Development Calm Spectrum Consulting Career 1 Catholic Crosscultural Services Centre For Skills Development
- Civic Action Conestoga College COSTI Emercomm Business Consultants Inc. Family Services of Peel Gate Gourmet

Goodwill Amity Group

Halton Region HMC Connections Holiday Inn Express & Suites Brampton Invest Brampton Job Skills LSC Communications Mandi J Buckner Consulting MetriCan Milton Chamber of Commerce Mississauga Board of Trade

Moffatt Scrap Iron Newcomer Centre of Peel NPower Canada ONE For Freight Peel Newcomer Strategy Group Punjabi Community Health Services (PCHS) Region of Peel Rockwool

Sheridan College Skills for Change Spero Careers Canada The Competitive Workforce Coalition of Canada Toronto's Workforce Funder Collaborative Town of Caledon

United Way Greater Toronto VPI Working Solutions WCG Services



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