Toronto Workforce Innovation Group
PARTNER IN A WORKING TORONTO

TORONTO'S OPPORTUNITIES AND PRIORITIES

TOP REPORT

LOCAL LABOUR MARKET UPDATE

2011

Toronto Workforce Innovation Group
Partner in a Working Toronto

The Toronto Workforce Innovation Group (TWIG) is a catalyst for innovative workforce solutions. We work to ensure that Toronto is prepared to meet the demands of a changing economy by identifying the skills, training needs and workforce issues of our local economy. We believe that innovation comes from working together to respond and act on local opputunites, priorities and issues. By engaging in research on issues related to the local economy including the emerging green economy, knowledge workers, mature workers, and internationally educated professionals we highlight the strengths and opportunities in our local economy.

Incorporated in 1997 as the Toronto Training Board, our name changed in 2009 to better reflect our mission and mandate. TWIG is an autonomous, non-profit led by a volunteer Board of Directors who understand the importance of a vital and responsive local labour market. We are a member of Workforce Planning Ontario, a network of workforce planning boards funded by the Ministry of Training, Colleges and Universities.

The work of the Toronto Workforce Innovation Group includes:

- Doing research that analyzes and identifies the issues and opportunities in Toronto's labour market
- Convening labour market partners to collaborate on effective partnerships to address the issues
- Evaluating and using the information to improve our contribution to Toronto's prosperity
- Playing a pivotal role in promoting and supporting overall strategies for workforce development in Toronto.

Gathering data and making the information accessible to a variety of stakeholders is one of the primary responsibilities of the Toronto Workforce Innovation Group. This report is one way in which we fulfill that responsibility. This 2011 Toronto's Opportunities and Priorities Report: a local labour market update brings together the prominent themes in Toronto's economy with the emerging and growing sectors. The action plan is both an update on past initiatives and recommendations for future endeavors. The Toronto Workforce Innovation Group thanks all those who have contributed to this report through consultations, conversations and/or data sharing. We also thank our sponsor, the Ministry of Training, Colleges and Universities.

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Workforce Planning Ontario
www.workforceplanningontario.ca

Executive Summary

Toronto's ability to attract talent is unparalleled in Canada. Toronto is one of the most diverse cities in North America and the premier destination for highly skilled newcomers to Canada. Approximately half the population of the city is made up of immigrants. In addition, Toronto draws youth from other areas in Ontario and across Canada because of its attractiveness as an urban setting and because of its three major universities and three community colleges. The presence of highly skilled and well educated immigrants and young people, in combination with access to post-secondary education, contributes to Toronto's rapidly growing knowledge economy and keeps Toronto's workforce relatively young. Yet, one of the ironies of Toronto's labour market is that many highly educated youth and newcomers are not finding their way to jobs that match their skills, experience or credentials.[1]

Our conversations and consultations with representatives from the private sector, business associations, sector councils, academic institutions and community groups verified the information that emerged from empirical research. Toronto's economy is shifting rapidly in response to changing demographics, the demands and expectations of a knowledge economy, the emergence and growth of a green economy, the increasing number of post-secondary graduates, technological advancement, and the ongoing change from goods production to service production. These shifts overlap and impact employment sectors in a variety of ways. For example, a young, technologically savvy workforce will push forward changes in the way business has traditionally been conducted, breathing life into new means of reaching and engaging target markets. Likewise, the creation of the Green Energy Act, along with the Feed in Tariff program, has provided a major impetus for the development of sustainable energy technologies. To grow, this emerging sector will require a workforce that is both knowledgeable and capable of weaving this change deeply into Toronto's fabric. These shifts will acutely impact the city's labour market as the demand for skills, training, re-training, education and re-education tries to meet the need for new talent and new skills.

In this report, we present a strategic framework that puts a spotlight on four broad sweeping themes that impact all of Toronto's industrial sectors: diversity, the changing economy, a greening economy and technological advancement. By looking at Toronto's labour market through these lenses, training adjustment needs are brought to the forefront in a way that looking at statistical labour market data alone cannot. Through taking both a quantitative and qualitative look at Toronto's labour market development needs, we are ensuring the continued leveraging of Toronto's potential to be a global city with a productive, inclusive and integrated workforce that benefits all of its residents.

The information in this report comes from a number of sources including Statistics Canada, tax filer data, City of Toronto labour market information, the Conference Board of Canada, TD Economics, Greater Toronto Summit 2011 backgrounders, and other recent reports as well as extensive community consultations and local intelligence in the private, public and not-for-profit sectors.

Overview of Methodology

Combining approaches from TWIG's 2009 and 2010 TOP reports has allowed us to focus on both sectoral analysis and emerging issues, both within sectors and across sectors, mirroring the complexity and multi-faceted nature of Toronto's economy. We used four specific "lenses," or labour market development priorities, to organize and analyze the information. The lenses we applied were: diversity, a changing economy, the technological and digital permeation of the working world, and the emerging green economy. These issues were selected as they arose repeatedly in both our consultations in the private, public and not-for-profit sectors, as well as other community gatherings such as the CivicAction Forum in February 2011, in which 800 participants from the Greater Toronto Region discussed issues of common concern. The background papers for that summit included reports on the environment, labour force development, immigration, youth employment, diversity and the importance of arts and culture. The themes or priorities are wide-ranging and impact all of Toronto's employment sectors.

This approach helped to inform the focus for next year's action plans, which will continue TWIG's work in the areas defined by the four lenses. The action plans will concentrate our efforts across industrial sectors as the priority issues identified through the lenses do not limit themselves to one specific area of the labour market, but instead have a broad reaching impact.

To gather information for this report, we attended over 25 consultations, meetings and events. We held one consultation, "Innovative Approaches to Prosperity: Shaping Toronto's Labour Market," in November 2010 that attracted over 150 participants. The conversations at that event, in combination with the consultations and meetings attended and the information gleaned through TWIG's other major reports and research released over the past year, informs this report. The consultations and meetings included events held by the Board of Trade, CivciAction, the Greater Toronto Marketing Alliance, Canadian Urban Institute, Canadian Business Leadership Forum and the Institute for Research in Public Policy. In addition, we organized a series of professional development workshops for job developers, and went to network meetings of employment/training service providers and the Local Immigration Partnerships.

Local Labour Market Analysis

The Greater Toronto Area economy was dramatically impacted by the global financial crisis and resulting downturn that began in September 2008.[2] The job market was hard hit and employment fell by 1% in 2009, the first decline in 16 years. Employment gains continue to lag behind economic growth and the unemployment rate remains persistently high, at an average of 9.1% in 2010.

In Toronto, the economic recovery began quickly and economic growth returned in the second half of 2009. Strong gains were seen early in 2010. In February 2011, the economic outlook was generally positive and real GDP growth is expected to reach 3% in 2011. Over the median term, the GTA is expected to have one of the fastest growing economies in Canada, with continued gains in employment concentrated in specific sectors.

However, global events of February and March 2011 are predicted to impact economies both local and global. Unrest in the Middle East will influence energy prices and availability, resulting in rising prices for energy and food, impacting all sectors that depend on transporting goods and services. The earthquake, tsunami, and nuclear disaster in Japan may result in increasing interest in alternative sources of energy as concerns about the safety of nuclear energy rise. The impacts of current global events over the longer term on continued economic recovery are, at this point, still unknown.

In order to remain an attractive destination, the Greater Toronto Region has to resolve issues such as how to move people effectively and efficiently throughout the region; how to develop a coherent and coordinated approach to economic development; and how to integrate highly educated newcomers and youth equitably into the workforce.

The industries and/or employment sectors that are growing in Toronto are construction, retail trade, finance and insurance, professional and scientific services and health care. Educational services, accommodation and food services (hospitality) and manufacturing retain significant market share.

Manufacturing started to demonstrate some growth after falling by 13.8% in 2009. GTA manufacturing output expanded by 9% in 2010, although it fell again in the third quarter. The sector continues to restructure and predictions are that growth will be slow and modest.[3]

The construction sector, driven by interest in sustainable building and retrofitting and several large construction projects, like the Pan Am games, has started to revive. While housing starts are modest, non-residential construction continues to flourish, with some significant projects completed in 2010 including the Bell Lightbox, which is connected to the Toronto International Film Festival, and the Ritz-Carlton Hotel. Four additional 5-star hotels are under construction in Toronto's downtown center. Overall, construction output is predicted to grow by 2.3% in 2011 and 3.25% in 2012.[4] The Pan Am Games in 2015 are expected to spur construction growth in the GTA and leverage opportunities for youth engagement and employment.

The financial services sector continues to be a major contributor to Toronto's economy. Toronto's financial sector is the third most important in North America, and one of the top 10 internationally. The services sector gained steadily in the areas of wholesale and retail trade and in transportation and warehousing. In 2010, the wholesale and retail trade output expanded by over 7%; growth is expected to continue to be slow and moderate.

One of the difficulties in analyzing economic data is that the tools available to examine occupations and sectors are not current and do not capture the changing trends. As an example of a sector that is hard to define, the emerging New Media sector fits into several sectors including Arts and Culture, Information and Communications Technology and Professional and Technical Services. Information Communications Technology is a dynamic, multifaceted sector and Toronto is an important centre for the development and distribution of new media. The Toronto region has the largest concentration of medium and large private ICT companies in Canada and ranks third among major North American metropolitan areas. Toronto's strengths are software and systems development, manufacturing and ICT services.

While arts and culture ranks low in the chart, the sector makes an important contribution to Toronto's economy and sets Toronto apart from other areas. Richard Florida[5] has written extensively about the creative class, and these workers are a key segment of the local labour market, as the sector has a location quotient above 1, indicating high employment specialization and opportunity. Over 60,000 people in Toronto are employed in this sector and the average annual growth rate is close to 3%. In this sector, as in many of Toronto's industrial sectors, workers are found in broad occupational clusters including professional, scientific and technical services, arts, entertainment and recreation and in manufacturing industries. Part of this is due to the fact that the occupational classifications are not yet sophisticated enough to capture the variety of occupations and skills sets involved in much of this work.

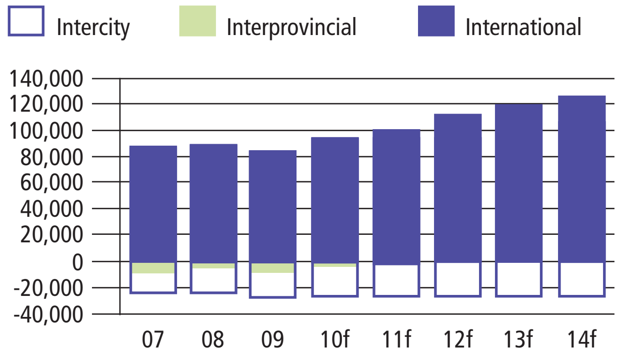
Labour Force Characteristics

The total population of Toronto CMA in 2010 was 5,714,000 and is predicted to grow to 5,811,000 in 2011. The population of the City of Toronto is close to 20.6% of the population of the province and 7.9% of the population of Canada. The GTA is expected to remain the region with the youngest age demographic, a result of the constant international immigration and the attraction of the GTA for youth from outside the Toronto area.[6]

1. Migration

According to the Conference Board of Canada, international immigrants are the highest source of migration to Toronto, while intercity migrants comprise the next largest group. The level of international migration to Toronto in 2011 is predicted at over 80,000, growing to over 100,000 by 2015. Figure 1 shows the various sources and levels of migration.

Figure 1: **Sources of Migration**



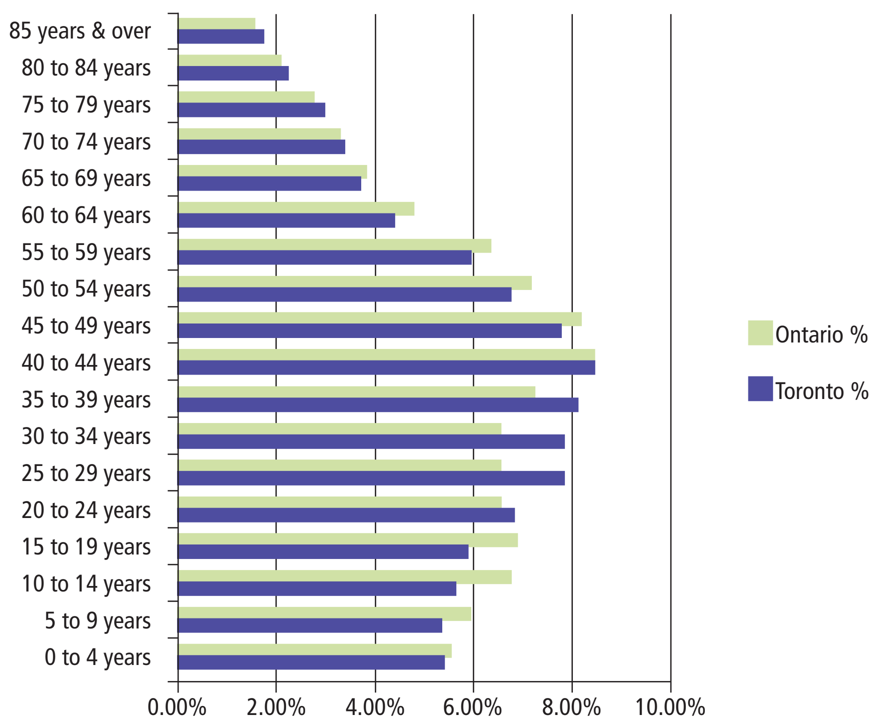
Sources: Statistics Canada, Labour Force Survey; The Conference Board of Canada

2. Age Breakdown

Toronto has a comparatively young labour force. However, slow population growth and a population that is moving toward retirement are expected to reduce labour force growth. Currently, nearly 50% of Toronto's labour force is between the ages of 25 and 44, representing a large pool of workers at the height of their productivity. Approximately 20.5% of the population will be 65 years or older by 2031 as compared to 13.6% in 2009.[7]

By 2036, the proportion of youth in the Toronto population will be only half that of seniors (10.2%, compared to 10.8% in 2009).[8] The figure below compares Toronto's age pyramid to Ontario.

Figure 2



Source: Statistics Canada, Census 2006

3. Labour Force Activity

Toronto's labour force totaled more than 1.4 million in 2009, representing over 20% of the provincial labour force.

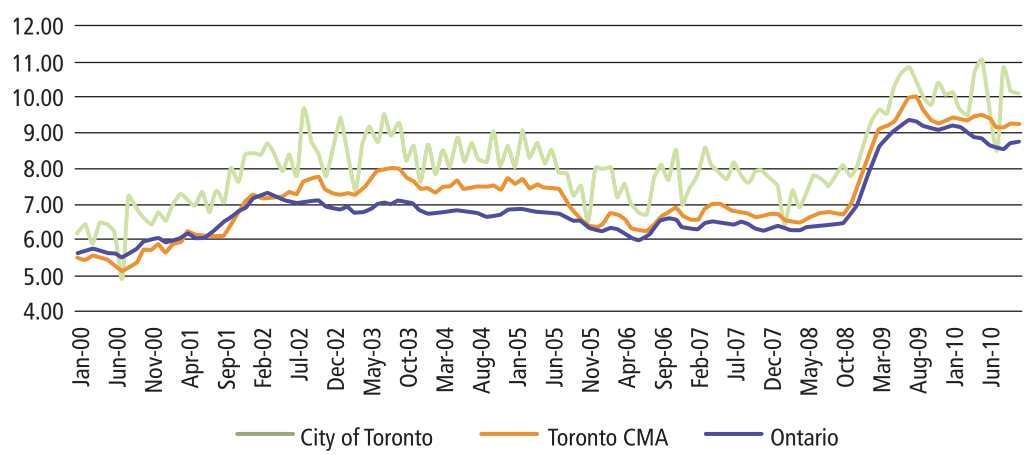
Figure 3

City of Toronto	2007	2008	2009
Population 15+ (000s)	2,194.60	2,210.80	2,239.88
Labour Force (000s)	1,447.52	1,467.96	1,487.96
Employment (000s)	1,333.53	1,357.54	1,339.33
Unemployment (000s)	113.99	110.42	148.64
Not in Labour Force (000s)	747.08	742.84	751.92
Participation Rate (%)	65.96	66.40	66.43
Unemployment Rate (%)	7.87	7.52	9.99

Source: Statistics Canada, Labour Force Survey

Toronto CMA and Ontario residents have a lower unemployment rate than City of Toronto residents. The next figure shows the change in unemployment rates from 2000 to 2010.

Figure 4: **Unemployment Rate 2000-2010**

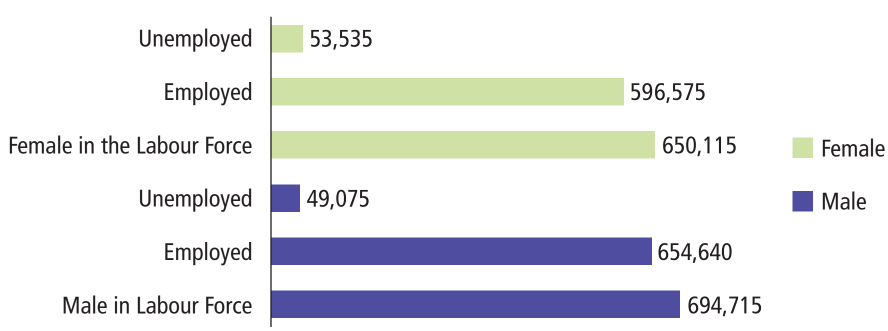


Source: Statistics Canada, Labour Force Survey 2000-2010

4. Labour Force Activity by Age and Gender

Figure 5, below, indicates that unemployment rates are higher for women between the ages 25 and 49, while the rates for all other groups are approximately the same.

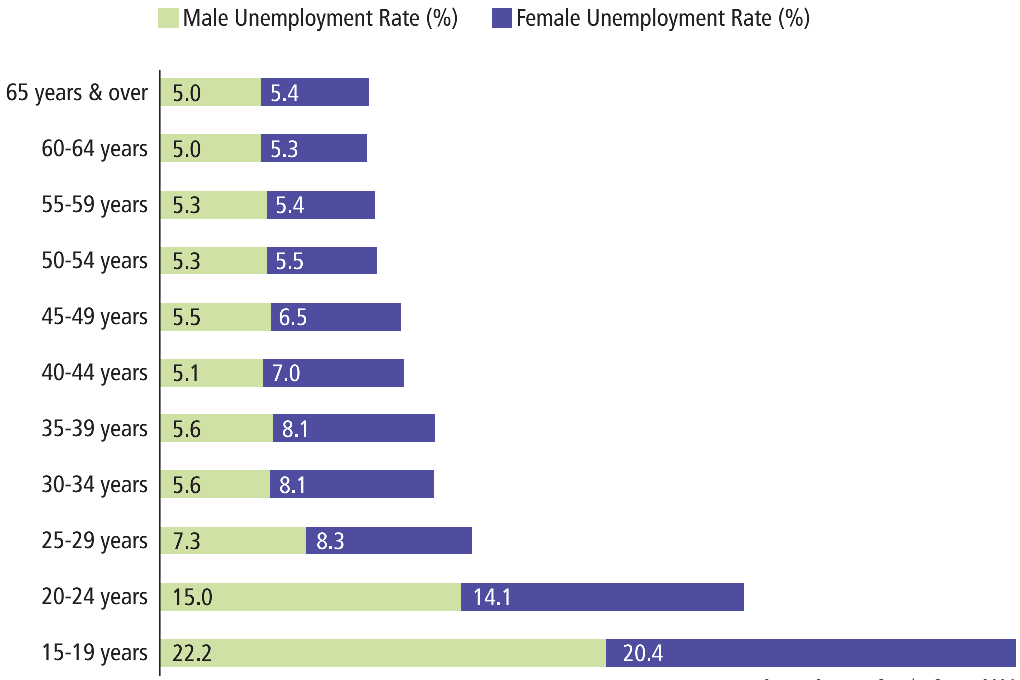
Figure 5: **Labour Force Activity by Gender 2006**



Statistics Canada, Census 2006

The following figure compares unemployment rates by age and gender. The unemployment rates for those ages 15-19 and 20-24 are high and relatively equal.

Figure 6: **Unemployment Rate by Age and Gender 2006**



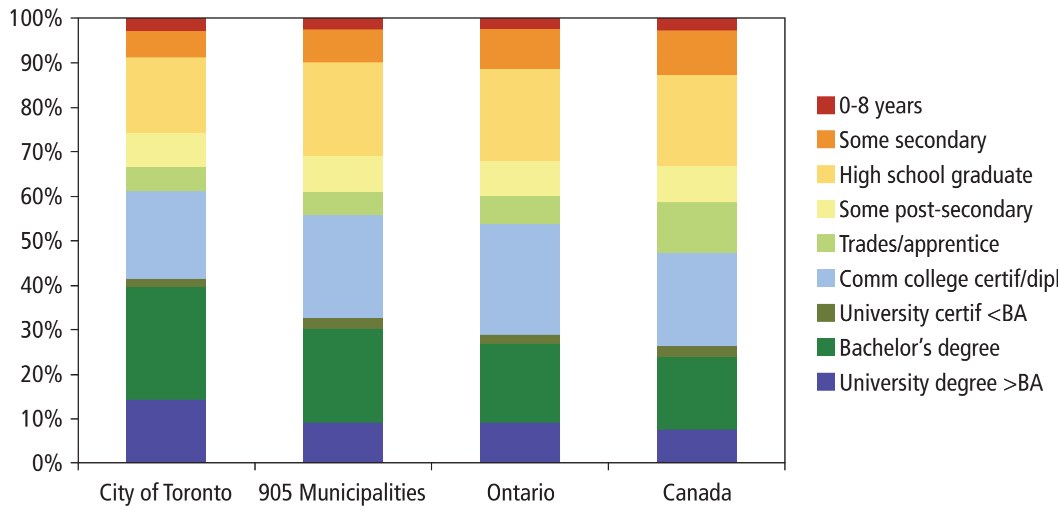
Source: Statistics Canada, Census 2006

5. Educational Attainment Levels and Labour Market Outcomes for Youth and Immigrants

Toronto's educational attainment levels are high in comparison to Ontario. One in three Torontonians has a bachelor's degree or higher. This is partly due to the number of highly skilled and well-educated professionals who choose to settle in the city and partly a result of the significant number of post-secondary institutions located in and around Toronto. The city has three universities and three community colleges that are accessible by public transportation. The irony is that, with all the highly qualified immigrants and youth graduating from post-secondary institutions, there remains a mismatch between the jobs available and the skills of those seeking employment. For example, newcomers face considerable challenges to labour market participation that matches their skills and abilities. The growing knowledge sector does not have enough employment to accommodate the youth graduating from Toronto's post-secondary institutions. Consequently, youth unemployment rates continue to be high and the participation rate is only 58%, almost 10% less than the participation rate of adults.

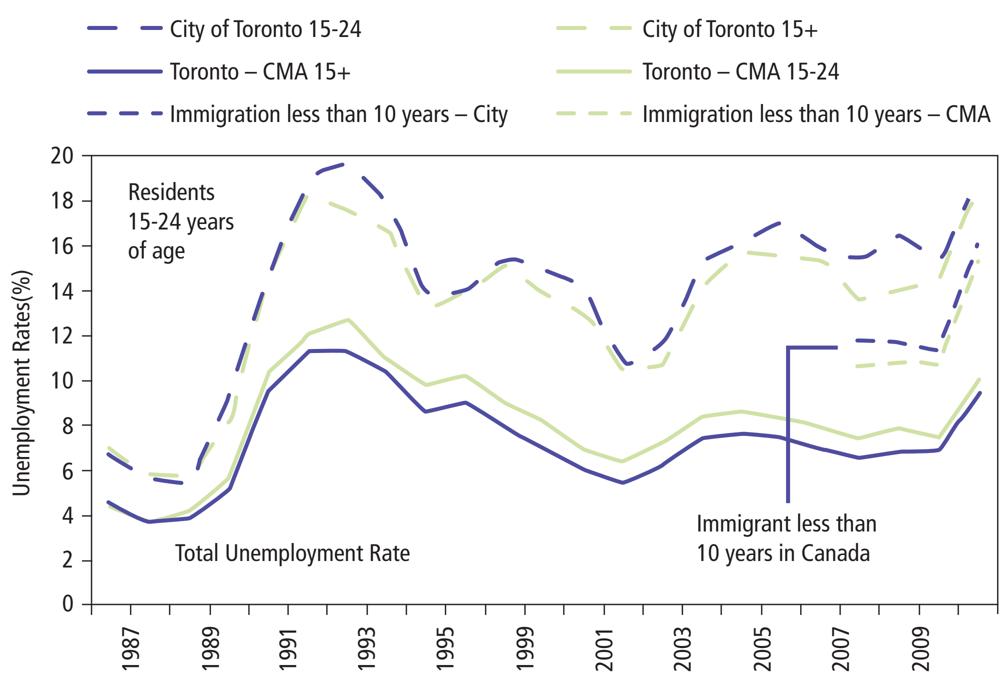
Figure 7 shows the various levels of educational attainment, comparing Toronto to other areas in the GTA, Ontario and the rest of Canada.

Figure 7: **Labour Force by Educational Attainment**



Statistics Canada, Labour Force Survey

Figure 8: **Unemployment Rates, Youth, Recent Immigrants, All**



Source: Statistics Canada, Labour Force Survey

According to the figure above, by the end of 2010, the unemployment rate for immigrants in the Toronto CMA was 9.4%, 5.2% higher than among the Canadian-born. Additionally:

- 40% of new immigrants downgrade their career or employment expectations on arrival in Canada, regardless of educational or professional levels of achievement
- Immigrant women with college or university education have the lowest unemployment rates, while immigrant men with trades training have the lowest unemployment rates
- From 2009 to 2010, immigrants in the Toronto CMA gained less than 5,000 jobs while Canadian-born residents gained 113,200 jobs.[9] Immigrants gained jobs in

information, culture and recreation, health care, social assistance and in the trades. Canadian-born workers gained jobs in public administration, finance and insurance and real estate.[10]

Sectors to Watch

1. Retail Trade is the "harbinger of the economy." When the economy is strong, this sector expands and it is the first sector to suffer in an economic downturn. There are 120,000 people who work in retail in Toronto and there are many employment opportunities beyond sales and service due to the concentration of head offices in the city. As a significant employer of youth, women, and IEPs, opportunities for advancement within this sector deserve more attention in order to move beyond the assumptions that this is an entry-level, low-wage sector with jobs only in sales and service. In addition, the emergence of green jobs may lead to new employment and training opportunities as consumers expect knowledgeable sales and service people to explain the safety and environmental impact of consumer goods. Rising energy and food prices may also affect trade and commerce.

2. Arts and Culture is a sector that sets Toronto apart from much of the rest of Ontario. Toronto is one of the top five cities in North America in terms of employment in the artistic and creative sectors that have experienced growth in recent years. As stakeholders begin to consider a workforce development strategy for the city, new initiatives and opportunities are likely to arise. As the majority of those working in the sector are either working in small businesses or self-employed, the sector faces many limitations and difficulties in relation to training and capacity building.

3. Information, Communications Technology (ICT) is another growth sector in Toronto, in particular in the area of new media and mobile applications. With an unemployment rate of only 4.1% compared to Toronto's rate of 9.4%, there are many opportunities to be taken advantage of within this sector. Technological development is expected to accelerate while becoming more global.

4. Construction is an important contributor to Toronto's economy. Over 1 million people are working in the construction sector and green construction is rapidly expanding due to both consumer demand and Toronto's Green Building policy. There are significant projects and initiatives that are predicted to result in jobs and opportunity, such as the Pan Am games and neighbourhood renewal projects like Regent Park and Lawrence Heights.

Retail Trade

The retail trade sector is made up of firms primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. This sector has two main types of retailers: store and non-store retailers.

Industry Profile

The retail sector has a direct and indirect impact on Toronto's economy, playing a key role in bridging production and consumption. In the early 2009, wholesale and retail trade output fell by 3.7%[11] as the economy experienced a decline in employment, impacting personal incomes and consumer confidence. As the economy improved, through the last half of 2009, the sector started to recover.

The significant retail trade subsectors by number of jobs in Toronto are:

- Food and Beverage Stores
- Clothing and Clothing Accessories Stores
- General Merchandise Stores (department stores, warehouse clubs and superstores)

Among these larger retail subsectors, Clothing and Clothing Accessories Stores have experienced consistent growth and have a high concentration in Toronto. The Food and Beverage Stores and General Merchandise Stores subsector has shown some employment shrinkage.

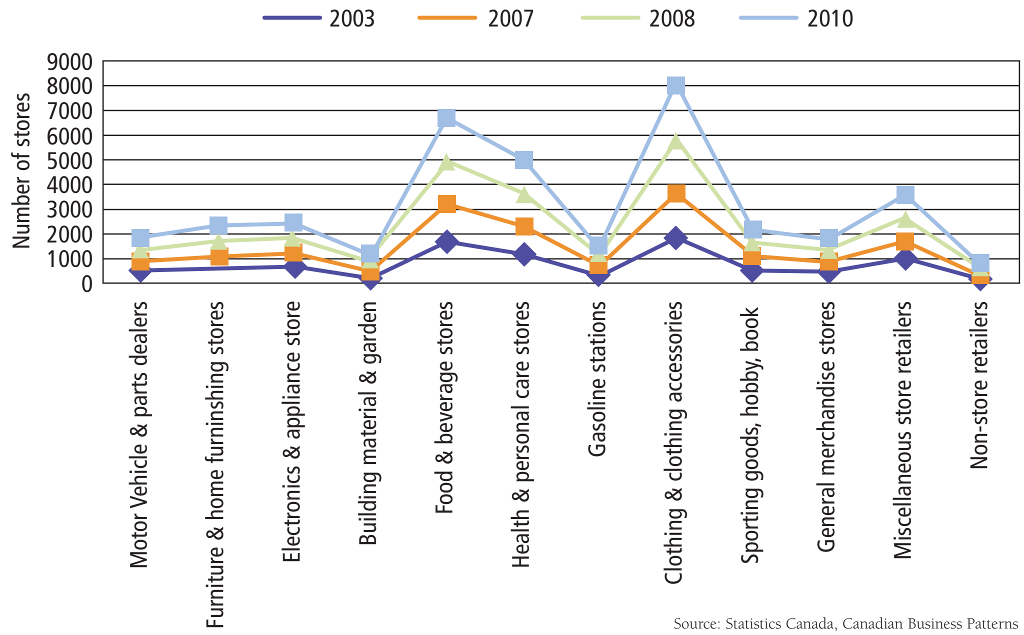
Following the recession in Ontario, youth experienced a significant drop in permanent employment and a significant increase in temporary employment. Adults saw a very significant increase in permanent employment and a slight increase in temporary employment.

Number of Businesses

Overall, the retail sector in Toronto is dominated by firms (stores) with fewer than 20 employees. In 2003, firms with five to nine employees made up 21.6% of all firms in the sector. By June 2010, this share had increased to 26.5%.

Despite the recession, Health and Personal Care Stores and Building Material and Garden Equipment Dealers showed a steady increase in numbers. Other categories experienced healthy growth, but following the recession their numbers either stalled, including Clothing and Clothing Accessories Stores and Food and Beverage Stores, or dipped, including Electronics and Appliance Stores and Furniture and Home Furnishing Stores. Specific retail store categories experienced a steady decline in numbers, notably Gasoline Stations (which may have reached their low), Non-store Retailers, General Merchandise Stores (surprisingly, given that this category includes department stores, warehouse stores and superstores) and Motor Vehicle and Parts Dealers.

Figure 9: **Change in Number of Firms by Retail Category 2003-2010**



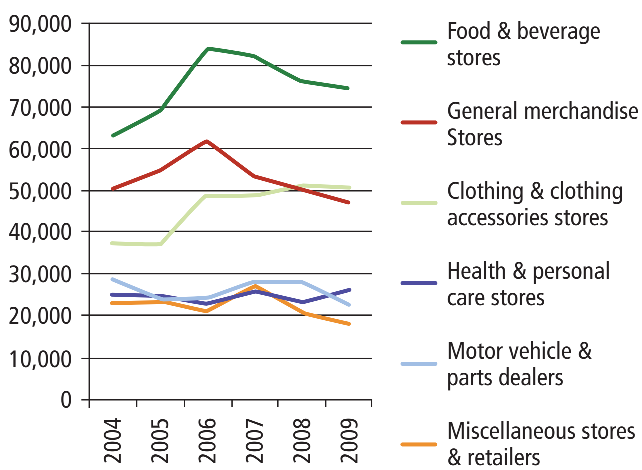
Source: Statistics Canada, Canadian Business Patterns

Labour Force Characteristics

Between 2004 and 2009, among the larger retail sub-sectors (Figure 10/1), Clothing and Clothing Accessories Stores continued to grow, while Food and Beverage Stores and General Merchandise Stores experienced a decline in employment. The smaller retail sub-sectors (Figure10/2), Building Materials and Garden Equipment Dealers, also grew, as did Furniture and Home Furnishing Stores. Gasoline Stations continued to experience a drop in employment.

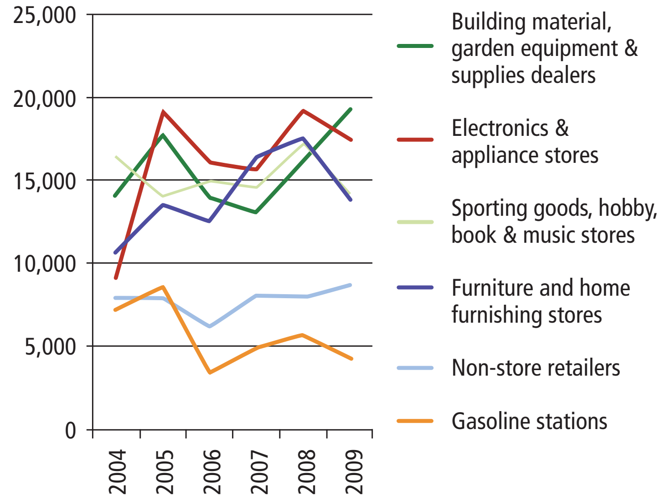
Figure 10:

1. **Larger Retail Sub-sectors, Employed, Residents, Toronto CMA, 2004-2009**



Source: Statistics Canada, Labour Force Surevey

2. **Smaller Retail Sub-sectors, Employed, Residents, Toronto CMA, 2004-2009**



Source: Statistics Canada, Labour Force Surevey 2004-2009

While stores with over 500 employees still represent a small proportion of all employment in the retail trade sector, their share of retail sector employment in the Toronto CMA has almost doubled in seven years. The table below indicates the relative growth of large stores.

Figure 11: **Employment in Retail Sector by Establishment Size, Toronto CMA 2002-2009**

Size of Establishment	Employees		Percentage		Percentage Increase 2002-2009
	2002	2009	2002	2009	
< 20 employees	90,110	95,070	37.1%	33.9%	5.5%
20-99 employees	95,920	111,430	39.5%	39.7%	16.2%
100-500 employees	47,560	55,230	19.6%	19.7%	16.1%
> 500 employees	9,280	18,760	3.8%	6.7%	102.2%
TOTAL	242,870	280,490	100.0%	100.0%	15.5%

Source: Statistics Canada, Labour Force Survey

Retail Trade Occupations in Demand

While all occupations are in demand, there is an increasing need for qualified professionals who are experts in their field, such as store managers, as well as experts in administration and management. The retirement rate for store managers is higher than average and has created numerous opportunities. The unemployment rate in this sector is considerably below the national average.

Jobs in the Retail Sector are requiring higher and higher levels of expertise and experience, somewhat driven by the technological changes in inventory, sales and marketing. This trend is now affecting small businesses, which in turn are tooling up and training themselves on new technologies.

Construction

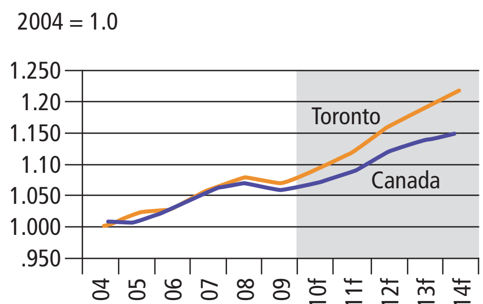
This sector is composed of businesses primarily engaged in constructing, repairing and renovating buildings and engineering works, and in subdividing and developing land. These establishments may operate on their own account or under contract to other establishments or property owners.

Industry Profile

In 2010, economic conditions started to improve and mortgage rates remained low. This resulted in a growth of the number of construction starts. In Toronto CMA, 18,221 high-rise condominiums started in 2010, more than twice as many as 2009. Projects like The Bell Lightbox and Festival Tower, completed on September 12, 2010, and other ongoing projects like Trump Tower and Maple Leaf Square, moved the non-residential industry through 2010.

According to Infrastructure Ontario, preparations for the 2015 Pan Am Games in and around Toronto could result in an increase in non-residential construction, making the Construction sector one of the fastest growing industries in Ontario through 2013. More than 15,000 construction and other jobs will be created during the next four years of building in Toronto, Hamilton, St. Catharines, Caledon, Minden and Welland. There are policies in place that will ensure that a percentage of workers getting construction jobs will be from disadvantaged communities.

Figure 12: **Employment in Perspective**



Sources: Statistics Canada, The Conference Board of Canada

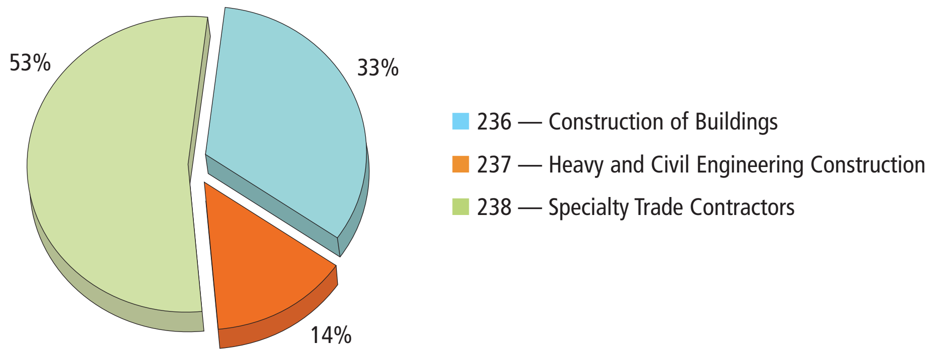
The Construction Sector Council reports that government stimulus in civil engineering-type projects is associated with labour demand for the following trades:

- Concrete Finishers
- Contractors and Supervisors
- Crane Operators
- Drillers and Blasters
- Heavy Equipment Operators
- Heavy-duty Equipment Mechanics
- Ironworkers
- Truck Drivers
- Welders

Number of Businesses

Small and medium enterprises dominate the construction sector. As of June 2010, there were 9,239 firms in the Specialty Trade Contractors, 5,750 firms in the Construction of Buildings and 2,328 firms in Heavy and Civil Engineering Construction subsectors. These construction firms accounted for 8.1% of the total enterprises by the end of June 2010. Specialty Trade Contractors had the largest share (53%) of firms in the sector.

Figure 13: **Share of Construction Subsectors, June 2010**



Source: Statistics Canada, Canadian Business Patterns, June 2010

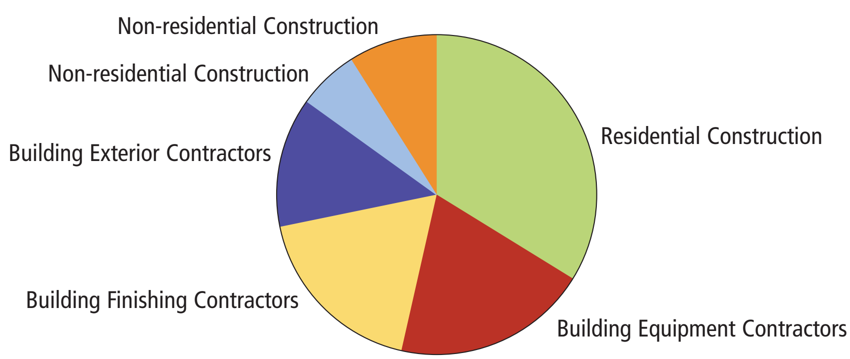
In 2010, the total number of construction firms was 17,317. This is a decrease of 322 firms from 2008. These losses peaked in 2008 and the number of firms increased in 2009.

Labour Force Characteristics

A third of Toronto residents, or 20,480 people, working in the construction industry are employed in Residential Construction; approximately one-fifth of that number in each of the following sub-sectors: Building Equipment Contractors, Building Finishing Contractors and Building Exterior Contractors.

About 6% are employed in Non-residential Construction. Another 9% are employed in Utility System Construction; Land Subdivision; Highway, Street and Bridge Construction; Other Heavy and Civil Engineering Construction; and Other Specialty Trade Contractors.

Figure 14: **Share of Employed Residents in Construction Sub-sectors, Toronto 2006**



Source: Statistics Canada, Census 2006

According to Canadian Business Patterns, there were 45,853 people employed in construction SMEs as of June 2010. Between 2008 and 2010, employment in SMEs fell across all construction subsectors. The table below depicts changes in employment in these subsectors.

Figure 15: **Change in Employment in Small and Medium Business, December 2008-June 2010, Toronto**

	2008	2010	Percent Change (%)
Construction of Buildings	13,782	13,202	-4.20
Heavy and Civil Engineering Construction	5,683	5,532	-2.65
Specialty Trade Contractors	27,972	27,118	-3.05

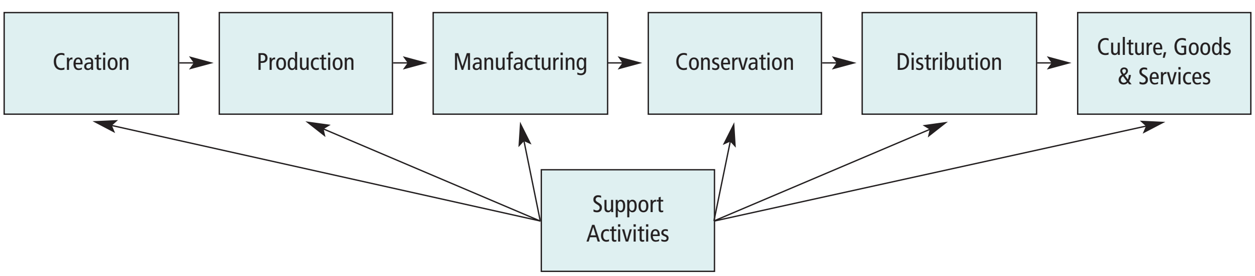
Source: Canadian Business Patterns, June 2010

In Toronto, the industry will receive an additional boost this year from the start of the second and third towers at the Bay-Adelaide Centre, as well as increased infrastructure spending. Part of the infrastructure spending in 2011 will be used to upgrade and maintain Toronto's transit system. The combination of the expected rebound in housing starts this year will spur growth in the sector.[12]

Arts and Culture

"Culture is the creative artistic activity and the goods and services produced by it, and the preservation of human heritage."[13]

Figure 16: **Creative Chain**[14]



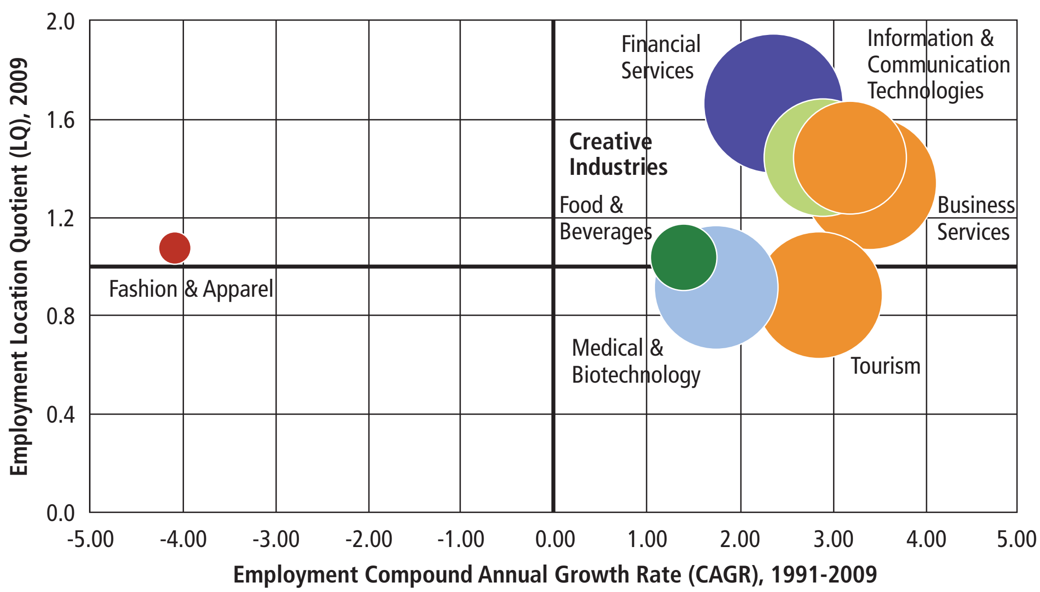
Creative Industries Overview

Toronto is one of the top five cities in North America in terms of employment in the artistic and creative sectors that have experienced growth in recent years. The creative sector employs over 100,000 people from a broad range of product producing and service providing industries. Integrated into the fabric of the city, the creative industries support other sectors of Toronto's economy including finance, ICT, life sciences and food and beverage.[15]

Figure 17

From 1991 to 2009, the creative industries grew at a compound annual growth rate of 2.9%, which outpaced financial services (2.4%), the medical and biotechnology industries (1.7%), and the food and beverage industry (1.4%). The chart below illustrates the growth of the creative occupations and overlaps with other sectors.

Figure 18



Source: Statistics Canada, Labour Force Survey, 1991-2009, City of Toronto [special tabulations]

Labour Force Characteristics

The entire culture sector makes up 9.2% of all employment in Toronto, compared to 4.6% for the rest of Ontario. There are 139,000 people employed in arts and culture occupations in the Toronto CMA, 62.9% of whom live in the City of Toronto. The global recession reduced average employment earnings paid to workers in the culture sector because of decrease in revenues.

Number of Businesses

Arts and Culture firms that depended heavily on business advertising were severely affected by the global recession and saw real revenues fall. Between 2008 and 2010, there was a decrease of 4.8% in the number of SMEs in Motion Picture and Sound Recording Industries. In June 2010, these businesses made up 2.28% of all SMEs in Toronto, or almost three times that of Ontario (0.8%). Losses in the number of SMEs were also recorded in the Broadcasting Industries (-3.7%) and in Performing Arts, Spectator Sports and Related Industries (-1.67%).

Figure 19: **Change in Employment in Small and Medium Business, December 2008-June 2010, Toronto**

NAICS	2008	2010	Percent Change(%)
Motion Picture and Sound Recording Industries	5,089	4,840	-4.89
Broadcasting (except Internet)	265	255	-3.77
Performing Arts, Spectator Sports and Related Industries	3,898	3,833	-1.67

Source: Canadian Business Patterns, June 2010

Arts and Culture Occupations

The number of jobs and the number of residents employed in the culture occupations in Toronto from 1996 to 2006 roughly doubled the rate of growth experienced by all occupations. There are numerous arts and culture occupations that cluster in Toronto in which more than half of Ontario jobs are found. Among these are broadcast technicians, audio/video recording technicians, producers, directors, choreographers, conductors, composers, actors and comedians.

Figure 20

Occupation	% in Toronto	Occupation	% in Toronto
Archivists	50.6%	Broadcast technicians	72.4%
Editors	53.1%	Audio/video recording technicians	62.7%
Producers, directors, choreographers	70.6%	Other supporting technicians	68.8%
Conductors, composers	53.0%	Other support occupations	53.6%
Actors, comedians	60.7%	Theatre/fashion designers	53.7%
Patternmakers	54.5%		

Source: Statistics Canada, Census 2006

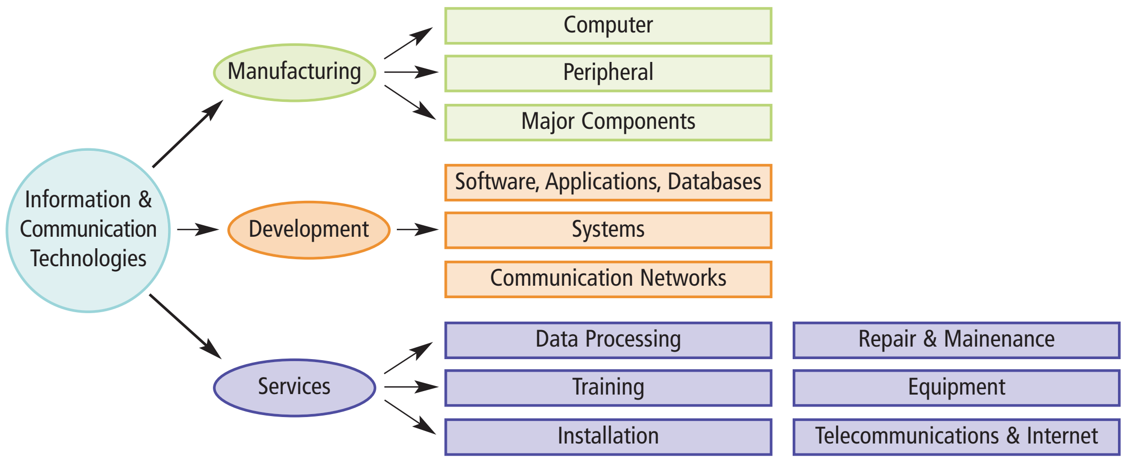
The sector is typified by:

- Generally higher levels of educational attainment, particularly university degrees;
- A very high proportion of self-employed individuals;
- A very high proportion of individuals working from home;
- A generally lower proportion of visible minorities, immigrants and newcomers (arrived in Canada since 2000).

Information and Communications Technology Sector

The Information and Communications Technology (ICT) sector is generally defined as a combination of manufacturing, development and services industries that capture, transmit and display data and information electronically. This means it is not entirely a sector but of a field of work that supports all other sectors. The diagram below illustrates this complexity.

Figure 21



Source: Greater Toronto Information & Communication Technologies Industry Profile, E&B Data, 2004

Industry Overview

The city's ICT sector is constantly evolving and growth is driven by a wide array of segments such as cloud computing, mobile platforms and applications, gaming, social networking, 3D and consumer privacy and security. These new ICT segments have tapped into Toronto's established ICT subsectors of communications, robotics, enterprise software, film, manufacturing and broadcasting, which combine to create an urban High-Tech Hub.[16] The ICT sector is closely collaborating with other sectors such as health care, education, social services, clean technology, media and entertainment. In 2009, Toronto ICT companies generated a combined revenue of over $52 billion, with $21 billion in the manufacturing subsector and $30.4 billion in the services sector.[17]

Number of Businesses

Toronto is home to 30% of Canada's 40,000 ICT firms.

Figure 22

Source: Invest Toronto

The sector is dominated by small firms (under 100 employees). Nearly 83% have fewer than 10 employees and nearly 98% have fewer than 100 employees.

In 2009, there were more than 11,500 ICT companies operating in the Toronto CMA, of which 605 were manufacturing firms and 10,917 service firms. The majority of these firms have less than 50 employees. Manufacturing firms are usually much larger than service firms.

Service companies (including communications providers, software developers and consulting firms) comprise about 95% of the total ICT firms, and manufacturing companies account for about 5% of the total.

Figure 23:

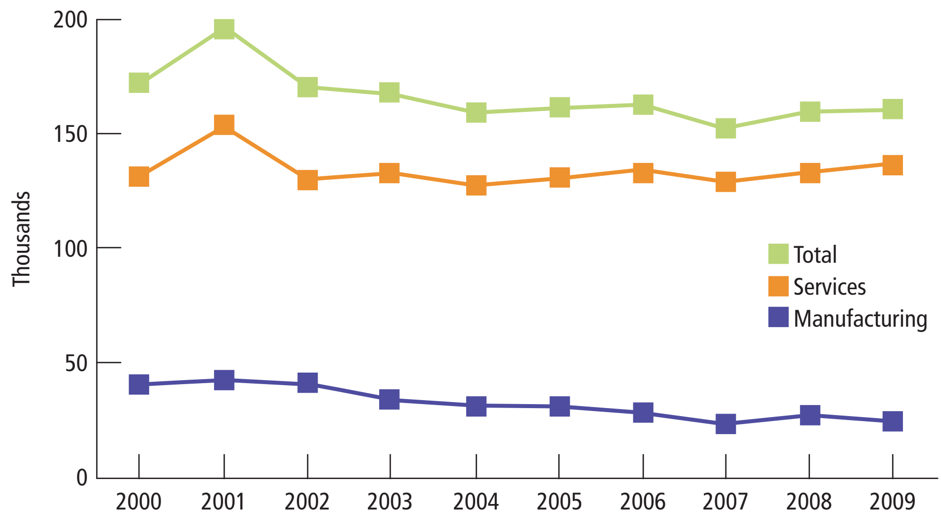
Source: Statistics Canada, Canadian Business Patterns 2002-2009

The IT services firms survived the recent economic crisis much better than manufacturing firms. The number of manufacturing firms fell from 681 to 605 whereas the service firms grew by 20%.

Labour Force

The ICT sector employs over 161,000 workers. This figure does not include employment in financial services, health care and the ICT jobs that are being created in areas like interactive digital media.[18] Capturing the rapid growth of jobs in this sector has become a challenge for statisticians. The unemployment rate for ICT professionals is 4% and the need for new talent is increasing.[19] Between 2000 and 2009, employment in the IT Services sector grew steadily while in manufacturing it declined, mainly because manufacture of ICT products takes place outside of Canada.

Figure 24: **Employment Change 2000-2009, ICT Services and Manufacturing**



Source: Statistics Canada, Labour Force Survey

The following figure shows employment of Computer and Information Systems Professionals in various industrial sectors illustrating the complexity of trying to measure the sector as separate from others.

Figure 25: **ICT Related Occupations in Various Sectors**

NOC 217 — Computer and Information Systems Professionals	City of Toronto
All industries	51,330
11 Agriculture, forestry, fishing and hunting	10
21 Mining, oil and gas extraction	250
22 Utilities	420
23 Construction	105
31-33 Manufacturing	1,740
41 Wholesale trade	2,050
44-45 Retail trade	1,450
48-49 Transportation and warehousing	275
51 Information and cultural industries	5,815
52 Finance and insurance	12,460
53 Real estate and rental and leasing	305
54 Professional, scientific and technical services	19,465
55 Management of companies and enterprises	240
56 Administrative and support, waste management and remediation services	1,080
61 Educational services	995
62 Health care and social assistance	1,185
71 Arts, entertainment and recreation	230
72 Accommodation and food services	135
81 Other services (except public administration)	575
91 Public administration	2,560

Source: Statistics Canada, Census 2006

Characteristics of the ICT Sector

- The ICT sector has a young workforce: 36.4% of ICT workers are under 35 years of age and 61.5% of the ICT workforce is under 45 years of age.[20]
- The sector has high levels of educational attainment: 96.9% of employees have a post-secondary certificate, diploma or degree, compared with 88.9% for the general labour force.

Demand for ICT-related employment will continue to rise as economies become "smarter" and ICT more pervasive. According to the OECD, the fact that the ICT sector has not suffered to the same extent as it did during the 2001 dot.com bust suggests that ICT continues to increase in importance for businesses and consumers. The trend of companies moving their production to lower-cost locations will continue, thus resulting into a shift to services sector. The rapid growth of the online digital content industry will bring more growth to the video game industry.

Strategic Training Priorities

The following strategic priorities or themes emerged from consultations, meetings, interviews with representatives from the private, public and not-for-profit sectors, along with extensive data analysis:

Growing Green Economy

The green economy is "an emerging marketplace that seeks to optimize the synergy among three sets of values: social, environmental and financial."[21] The Greater Toronto Region is becoming a significant centre of an emerging green economy. The region is recognized as a leader in policies and programs to combat climate change, such as Ontario's *Green Energy Act* of 2009 and the City of Toronto's building code, which stresses energy efficient construction. Some of the region's leading businesses, governments and agencies are linking environmental performance to bottom line results and becoming innovators in their respective areas. Many are generating economic value and developing specialized capabilities in areas such as green technology, the procurement of green products and services, energy-efficiency in buildings and better waste management systems.[22]

New opportunities for "green" careers are arising in response to a surge in demand. These careers include environmental auditors, environmental engineers, solar panel installers and technicians who can manufacture and build wind turbines.[23] Much of this is in response to the rising cost of oil and interest in renewable sources of energy, as well as increasing demand for local food and growing emphasis on local and/or environmentally safe products. The International Labour Organization estimates that the global market for environmental products and services will double in size from $1.37 trillion (US) in 2008 to $2.74 trillion (US) by 2020. Statistics Canada reports that Canadian firms earned $1.85 billion by selling environmental goods and services in 2004, an increase of close to 20% from 2002.[24]

Ontario's *Green Energy Act* is expected to stimulate increased investment in energy alternatives and create between 50,000 and 90,000 new jobs. The shift to a greener economy is now evident in many sectors: utilities, construction, manufacturing and retail trade. There are even "green" occupations in finance, such as "green" auditors. The most significant impact is in the utilities sector, where the creation of 13,000 new jobs by 2012 is predicted by Industry Canada.[25] The Ontario Power Authority is investing up to $30 million over the next five years in an industrial energy program to reduce electricity and gas consumption in the GTA. The demand for LEED (Leading Energy Efficient Design) certified buildings and emphasis on energy efficiency is demonstrated in the construction industry by the growing presence of LEED certified buildings. New construction in the GTA, which includes sites for the Pan Am Games, revitalization projects in Regent Park and Lawrence Heights, the Waterfront and the new George Brown campus, will add thousands of jobs and see the construction of energy-efficient, green buildings. This change is leading to a need for new skills training and educational programs.

The province is investing significantly through Ontario's Advanced Manufacturing Investment Strategy, which, since 2005, has made $100 million in loans to 18 Ontario companies, leveraging $890 million in new investment and creating or supporting 4,000 jobs.[26] In addition, the Federal Economic Development Agency for Southern Ontario announced several new programs that will amount to $30 million dollars for manufacturers to increase productivity through energy efficiency and industrial design. Manufacturing plants that are "greening" their processes or products are creating demand for managers, engineers, labourers, operators and materials handlers who are green specialists.

Even the financial sector is experiencing the shift to green as banks implement green banking systems or develop green financial products and services such as green car loans, energy efficiency mortgages, green venture capital, eco-savings deposits and green credit cards.[27] Employment and training in this sector is adjusting by developing new skills requirements and occupations for environmentally-trained professionals.

The Information, Communications and Technology sector (ICT) is prominent in Toronto and is also affected by the demand for a shift to greener technologies and applications. A report of 2009 indicates a 30% growth in the number of businesses in this sector that are applying environmental criteria to the IT plans. Green ICT offers information technology solutions that save energy for organizations and includes occupations such as equipment and procurement management.

Our community consultations and conversations resulted in the following:

- **Talent is critical** The green economy is dependent on the combination of quality of place, talent and opportunity. But many stakeholders involved in workforce development, as well as job seekers, are confused about what exactly a green job is, where these jobs will be and what the training and education requirements for these jobs will include. There is also confusion about whether these green jobs will be new jobs with new skills requirements or expectations, jobs or professions that will require the same skills with new applications of those skills, or whether there will be a new occupations and trades to meet changing occupational requirements.
- **Training and service providers** are looking for concrete data on employment in green industries and about green occupations, but having difficulty finding accurate information. Some have talked about the difficulty for the unemployed to gain access to Second Career funding as a result of a lack of green NOC codes. Colleges and universities would like concrete labour market data to help them inform curriculum and set program development agendas. Transitional pathways into the green economy, such as programs and interventions that help displaced or unemployed workers identify their transferable skills and how to use those skills to secure jobs in the emerging green economy, are needed.
- **The emergence of a new economy** provides the opportunity to integrate currently marginalized workers into new, viable employment with good growth prospects. Targeted training programs need to be put in place to ensure equitable benefits are derived from the growth of this economy.

Diversity

Toronto is one of the most diverse cities in the world. It is well documented that the majority of Toronto's labour market participation growth will come from diverse populations. The diverse population is both a unique strength for the Toronto region and a critical component of economic success. A background paper written for the Greater Toronto Civic Action Summit aptly named diversity "Our Greatest Strength, Our Biggest Challenge."

While the job seeking population is more and more diverse, the same representation does not correlate into the ranks of management, executive teams, board representation, or media representation. A recent report, "Canada's Colour Coded Labour Market: the Gap for Racialized Workers," notes that there are huge income variations among racialized groups that correspond both to year and place of immigration. While 67.3% of racialized Canadians are in the labour force in Canada, they earn only 81.4 cents for every dollar non-racialized Canadians earn. Though these are Canadian statistics, it is possible to apply this data to Toronto as a result of the larger populations of racialized Canadians and immigrants within the GTA compared to other provinces and cities in the country.[28] As Toronto is the primary destination for the largest portion of immigrants with post-secondary education qualifications, their smooth integration into commensurate employment is a top priority for the city's continued economic growth. Immigrants consistently face both higher unemployment and a greater incidence of underemployment than people who are Canadian-born.[29] Immigrants with a university degree have twice the unemployment rate and earn 40% less than Canadian-born people with a university degree.[30] This does not allow the leverage of high levels of education, professional qualifications or years of experience that newcomers bring to the Toronto economy.

Additionally, as baby boomers are not retiring in the numbers previously predicted, for the first time four generations of workers are in the labour force. A multigenerational workforce must reconcile diversity in regards to work ethics, processes and means while at the same time noting meaningful differences in what constitutes work-life balance.

As a result of the diversity inherent in the available workforce in Toronto,conversations are shifting from a discussion of the needs of various groups as separate entities to fortifying the business case for ensuring inclusivity in the workplace. As a result, the ability to create and ensure inclusive teams and workplaces is now seen as a primary management competency in any field, rather than a specialization. The main difference in this perspective is that there is recognition that the majority of Toronto's workers are members of minority groups in one way or another and, often in multiple ways. The continued success of Toronto as a competitive and innovative economy hinges on the ability to include, listen to and respect divergent perspectives as important contributors to the growth of the economic and social vibrancy of the city.

Community consultations reflected and revealed the following in relation to diversity:

- **Those responsible for recruitment** and hiring are key to ensuring equitable representation in Toronto's labour force. There is some concern that the focus on diversity training hinges too much on the job seeker or employee side of the equation, and too little on the employer or management side. As a result, there is room for diversity training initiatives targeting HR and hiring executives, as well as management levels of the existing workforce.

- **Small and medium sized enterprises** (SMEs) lack the HR capacity to put in place clear recruitment, hiring, and management policies for a diverse workforce. Stretched resources frequently result in hiring through and working within internal networks. Supports are needed that enable SMEs in this capacity, both through connecting them better to existing recruitment services such as Employment Ontario centres, and also in terms of internal diversity training and development.

- **The increasing sophistication of Internationally Educated Professionals** (IEPs) landing in Toronto over the past few years has meant a shift in needs regarding labour market integration. There were concerns raised about whether the current supports, including employment services, English as a second language and occupation specific language services, and various bridge training initiatives were resourced enough to be able to adequately meet these needs. Greater consistency in the messages newcomers are given both pre and post arrival, as well as access to information relevant to their unique needs, was a suggestion put forth by many.

- **Toronto's strong knowledge based economy** is presenting new barriers to entry for immigrants, women and youth, the three groups possessing the highest post-secondary credentials in Toronto's workforce. This challenges the idea that the higher human capital one possesses, the higher the reward in the labour market. Further research is needed that examines how these apparent mismatches between people and jobs continue to persist.

- **Baby boomers are not retiring** as had been expected. Some are seeking out other forms of workplace arrangements that allow more flexibility in their schedules, while still others are remaining in full-time employment. More needs to be understood about how to support mature workers who either choose to, or must remain in the workforce beyond retirement years, as well as those who are transitioning out of employment. As mature workers leave their careers behind, knowledge transfer will become an important issue for business continuity.

Economic Transformation

An economy is always in transition. However, the changes over the past decade have resulted in the need for different considerations in delivering employment and training programs. Ten years ago, manufacturing drove the economy. A decade later, as a result of economic restructuring, a strong Canadian dollar and the ease of outsourcing, the manufacturing sector is shrinking. Concurrently, Toronto's financial sector is one of the 10 strongest in the world. The recent recession particularly impacted manufacturing and, although the economy is starting to recover, the jobs have not yet returned to pre-recession levels.

Toronto's labour market is characterized by a large and increasingly inequitable knowledge economy. From 1996 to 2006, Toronto's knowledge sector added over 150,000 jobs, the only sector that grew. Estimates are that 65% of new jobs in the next five years will require some form of post-secondary education, making it more difficult for those without high school diplomas to access the workforce.[31] In addition to higher expectations regarding levels of education, employers are also expecting a high level of literacy, including technical literacy and employability skills, such as communication skills, problem solving and team work. New work arrangements have affected traditional routes to advancement; workers now expect to change jobs multiple times in their careers rather than stay with one employer. This change has affected traditional career pathways, leading to a need to reinvent and reconfigure these pathways. Changes in the structure of the workplace have led to changes in the economy. A growing polarization of incomes is creating an economy shaped like an hourglass, with large numbers of knowledge based jobs and large numbers of entry level or low skilled jobs at the extremes and few moderate skill range jobs in the middle. This means little mobility from the bottom of the skill range to the top is available within Toronto's labour force.

The city is also experiencing increasing social and economic polarization, reflected in the hourglass economy, the increasing numbers of people with precarious labour market attachment and the growing number of families living in poverty.[32] The characteristics of labour force attachment have changed from full-time, full-year jobs with benefits to increasingly part-time, contract arrangements, often at lower pay rates and with no benefits. Many of those characterized by the census as self-employed, unincorporated, and/or owner-operated are workers who are actually cleaners in buildings or delivering newspapers, and were formerly full-time employees.

Another driver of economic transformation is the global marketplace. Companies can now easily outsource many facets of production and service to places where costs are lower and import goods that cost less than those made in Canada. The higher costs of energy and transportation, together with a growing focus on local products, may negatively affect this trend toward globalization.

In order to ensure that the region's economy remains competitive and grows in productivity and innovation, attention must be paid to addressing the mismatch of skills needed and training programs available, and the mismatch between current labour force skills and new job requirements. Efforts are needed to more effectively connect the demand side of the labour market (employers) to the supply side (workers). Ensuring that workers, potential workers and labour force intermediaries have current, accurate and accessible labour market information is one way to connect supply and demand.

Community consultations noted the following concerns about a rapidly shifting economy:

- **Managing the rapid pace of change** is challenging. Eight out of 10 public sector leaders anticipate substantial change ahead but only 55% feel equipped to deal with the changes predicted.[33]
- **The increasing incidence of precarious employment** makes it difficult to manage work, family and community life. The “working poor” syndrome is increasing as people are trapped in multiple low paying precarious jobs. Improvements are needed in wage progression and means towards career laddering for the city’s most vulnerable workers. There is an emphasis on more widely marketing the trades as a sound career path and addressing barriers to access these careers. In addition, service providers are indicating that they need additional supports in dealing with clients who, increasingly, have precarious labour force attachments.
- **There is a need to use the skills that already exist** in the workforce by recognizing existing credentials and experience, removing barriers to employment and fostering innovation. Major gaps between employment training programs and available jobs are widely reported by both training bodies and employers. Systemic problems are inhibiting the development of the labour market and must be addressed on a system wide basis, including a coordinated economic and social development policy.

Technological Advancement

With the increasing permeation of the digital world into our working lives, combined with the low cost of use, organizations are increasingly seeking out better and more efficient means to manage and enhance productivity and effectiveness. Digital media, social networking, mobile apps, and web-based technologies and services present immense opportunities for innovation, as well as reduce barriers to entry for new businesses in many fields. As a result, a digitally savvy workforce provides a competitive edge in growing the traditional as well as digital economy.

Employees today need to possess digital literacy, defined as “...an understanding of the nature and uses of various digital media, tools and technologies; how to communicate and collaborate effectively via digital media; critical thinking about the role and uses of digital media; creativity, etiquette, safety, health; and so on.”[34] Without basic digital literacy skills in the workplace, technology can become a disabler of productivity as employees fumble through their days trying to figure out how and where to apply these tools to their working lives. The rapid addition of new software, services and tools to the market means employees are put under constant pressure to keep up-to-date, as well as to troubleshoot technological problems. The great variety, permeation, and pace of change of technology used in the workplace today presents new challenges for the digital literacy development of the current and future workforce.

Community consultations have revealed the following concerns regarding digital literacy skills in Toronto's labour force:

- **There are questions arising** regarding whether students graduating from high school, colleges and/or universities have the right mix of digital skills, business and communication skills to enable their entry and success within the labour market. Broad-based workforce digital literacy indicators need to be mapped in order to be embedded within the curriculum of elementary, secondary and post-secondary education.
- **There is additional concern** that the current workforce is being held back from reaping all the benefits new technologies could provide for business and work-flow as employees do not have strong enough skills to harness these benefits for the organization. Current employees, having not grown up in an e-permeated world, must engage in lifelong learning practices regarding tech skills or risk becoming redundant. This issue is particularly relevant to mature workers and mid-career professionals laid off during the recession. Most report that there are no supports for this ongoing professional development, meaning employees frequently have to seek out and pay for training on their own, or teach themselves.
- **As young people are growing up** completely within a digital world, intergenerational gaps in skill and awareness can inhibit effective work-flow practices. Some employers may not see a great return on their investment in professional development for older workers. At the same time, employers may not completely understand the digital perspectives and abilities young workers possess, meaning their skills are underutilized. If those managing multigenerational teams are not digitally literate themselves or do not place a high value on the equitable development of their teams, organizational effectiveness will be stifled.
- **Great variances in literacy levels are found within the current labour force,** presenting a challenge to training for broad-based digital literacy in Toronto. Bringing all of these divergent perspectives and abilities into alignment to enhance productivity, innovation and effectiveness needs to be a training priority across all sectors of the economy, as well as across all levels of formal education.

Action Plans

Partnerships and Collaborations

The Action Plans of the Toronto Workforce Innovation Group (TWIG) are guided by the priorities detailed above in combination with the data collected. These themes also inform the additional partnerships and collaborations in which we are involved. These include:

1. **The Annual IEP Conference —** TWIG is a member of the Advisory Committee for this conference that brings together over 1,000 internationally-educated professionals to learn about career development, training and employment opportunities.

2. **TAPA —** TWIG is partnering with the Toronto Alliance for the Performing Arts to hold a series of professional development lunch and learn sessions for their membership of small, community-based performing arts companies.

3. **Canadian Coalition for ICT Skills of the Future —** TWIG is working with the CCICT on their ICT Careers week in the fall of 2011.

4. **CivicAction —** This group, formerly the Toronto City Summit Alliance, organizes a bi-annual summit that brings together over 800 civic leaders in the GTA. TWIG participated in their working group on the labour market, preparing background papers on workforce development for the summit in February 2011.

5. **Wellesley Institute Policy Table —** TWIG is a member of this table, writing a paper on workforce development that will inform provincial associations.

6. **Community University Research Alliance (CURA) Grants —** TWIG is working on two CURAs:

    a. Precarious Employment in Southern Ontario, led by the United Way of Greater Toronto and McMaster University, looking at the impact of precarious employment on family and community life, and;

    b. Diversity Leads, led by the Diversity Institute at Ryerson University, will examine the impact and importance of diverse leadership in three cities. We are on the advisory committee and involved in the research.

7. **Work Connections Career Fair —** this is an annual partnership between the two Toronto school boards and the Youth Employment Partnership, a federation of 25 agencies coordinated through the City of Toronto. TWIG sits on the advisory committee and manages the website for this event that serves over 1,000 students who are graduating Grade 12 and not going on to post-secondary education.

8. **Hammerheads —** A program for Toronto youth from priority neighbourhoods to learn about the trades. Eighty-five percent of the graduates of this program go into apprenticeships or to work. TWIG sits on the advisory committee and helps with grant applications.

9. Immigrant Women's Journeys — This is a partnership with Working Skills Centre to celebrate the achievements of immigrant women. TWIG will be organizing business participation and representation at the event.

10. Employment Ontario Central Regional Forum — this is a partnership with First Work (Ontario Association for Youth Employment Centres) to organize a forum for Employment Ontario service providers in the Central Region. The forum is scheduled for May 2011.

Action Plan 1: Diversity Initiatives

Although many labour market shortages were predicted to occur as a result of baby boomers retiring, this mass exodus has yet to take place. Our consultations with employers reveal that new issues are emerging related to mature workers' unique professional development needs: ability to find work that suits their work-life balance needs, and co-existence with three other generations in the workplace. Given the population projections for the coming decades, a mature and maturing workforce is Toronto's reality. As a result, supports for employers and HR professionals to gain a clearer picture of how to support and manage mature workers would assist Toronto's continued economic growth.

Past Actions Taken

Diversity: Strategies for a Changing Workforce
R*eport: Songs of Experience: Mature Workers' and Labour Market Transitions*

Proposed Actions

Highlight emerging trends faced by employers and mature workers to enable a dialogue on next steps for training and raising awareness. The event will inform a report defining concrete recommendations for employers regarding retaining, developing and recruiting mature workers. A video of the event will be posted to TWIG's website.

Action 2: Changing Economy/Reframing Work

Current categorizations of industrial sectors and occupations, while useful as a model for collecting employment data in the past, are in some cases causing difficulties for capturing emerging fields. These changes in industry and occupations need to be discussed and documented in order to bring about changes in the way labour market information is captured in the future.

Likewise, traditional ideas of which occupations fit within which sector limit innovation in training and education programs aimed at preparing workers for future employment. Our consultations have revealed this to be the case in Information and Communications Technology, Design, and New Media/Broadcasting. Workers both within these fields, as well as those seeking entry to these professions, have a difficult time accessing relevant, up-to-date training.

Past Actions Taken

Report: *Planning to Succeed: Integrated Local Labour Market Planning Initiatives from the US and Europe*
Report: *Reshaping the Economy: Changing the Hourglass*
Event: Innovative Approaches to Shaping the Economy: Toronto Workforce Innovation Group, MaRS
Report: *Unpacking the Hourglass, 2011*

Proposed Actions

Hold community events highlighting the changing nature of Toronto's economy; defining emerging trends and blurring of sector lines; discussing implications on workforce development and current training and education structure. Videos from the series will be accessible on TWIG website for future access.

Action Plan 3: Green Economy

The emerging green economy holds the potential to provide new opportunities for currently marginalized workers seeking to enter or re-enter the labour market. In order to ensure that the benefits of such an economy are as widely spread as possible, local economic development activities need to be put in place that introduce the potential of green job creation in areas of the city with high unemployment. Through local economic development initiatives, social, economic, and environmental issues can be addressed simultaneously.

Past Actions Taken

Transitioning to a Green Economy: The Bottom Line for Ontario's Businesses
Greening the Economy: Transitioning to New Careers
Green Occupations Profiles
Green Entrepreneurship in Toronto
Skills for Energy Efficient Construction

Proposed Actions

- Connect residents with other established green and/or social enterprises, businesses, business development bodies, and funding bodies in Toronto to aid in business planning
- Report on local green economic development best practices in priority neighbourhoods in Toronto

Action Plan 4: Green Economy

There is much discussion about job creation emerging as a result of Ontario's *Green Energy Act*, yet there remains a lack of clarity about the scope and nature of these jobs. Two years into the *Act*, the opportunity exists to highlight some of the employment opportunities emerging in Toronto. Community agencies have initiated a number of employment training programs addressing green employment by developing innovative partnerships with the private sector. Their efforts have had a marked effect on marginalized workers. Pioneers in the green economy within the private sector have also brought about new employment opportunities that have yet to be met with related training and education programs. Discussions of the full range of employment coming from the development of the green economy in Toronto are needed in order to spark innovation in training, and for new partnerships to be created between diverse stakeholders interested in developing training initiatives.

Past Actions Taken

Transitioning to a Green Economy: The Bottom Line for Ontario's Businesses
Greening the Economy: Transitioning to New Careers
Green Occupations Profiles
Green Entrepreneurship in Toronto
Skills for Energy Efficient Construction

Proposed Actions

Hold an event highlighting green jobs initiatives that are underway in Toronto showcase the broad range of employment within the green economy and providing the opportunity for diverse stakeholders (private, public and not-for-profit sectors) the opportunity to discuss green job development for the city and region as a whole. A video of the panel discussions will be put on TWIG's website.

Action Plan 5: Digital Literacy

As electronic mediums increasingly saturate our working lives, basic e-literacy competencies need to be mapped in order to ensure that our current and future workforce possesses the required skills to productively engage in work. As many workers are learning their digital skills on the job, those seeking entry to professions or workplaces are already disadvantaged as a result of not being employed. A basic mapping of digital literacy skills will provide direction for training initiatives that address this pressing need for workers at various skill levels.

Past Actions Taken

St. Jamestown Digital Mapping Project

Proposed Actions

- Surveying various levels of the workforce about their day to day use of digital mediums, their difficulties and limitations with such mediums and their ideas about useful training
- Creating a basic map of level of digital literacy for entry level, middle and knowledge level jobs

Action 6: Changing Economy/ Reframing Work

Youth are disproportionately being shut out of the knowledge economy in Toronto's labour force despite their increasingly high post-secondary qualifications. This presents new challenges to integrating this population into knowledge based positions as career pathways from entry level positions are shrinking in many sectors.

Past Actions Taken	Youth employment partnership: Going Green: More than Changing a Light Bulb Youth employment partnership: The ABC's of the Trades *Following the success: promising workplace learning practices in marginalized youth employment* *Talking Points: A cross regional dialogue on youth employment*
Proposed Actions	Events informing Job Developers working in employment services about emerging professions in a rapidly changing economy

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Appendix B — Consultations/Events 2010-2011

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3. Precarious Employment Conference, CAW
4. ICE Committee
5. Learning Partnership Roundtable on Public Education and Labour Market
6. Certified General Accountants Round Table
7. City Summit Alliance Labour Market Working Group
8. City Summit Alliance Summit Round table on Social Inclusion
9. Clean Air Partnership Summit
10. Board of Trade Regional Forum
11. Net Change Week
12. Toronto Immigrant Employment Data Initiative (TIEDI) Consultation
13. The Learning Partnership- Labour Market Trends Roundtable
14. Micro-Lending, Women Entrepreneurship Event
15. Toronto Employment Social Services Consultation
16. Downtown East Community Development Collective (DECDC)
17. Greater Toronto Marketing Alliance
18. Vital Signs Launch
19. Canadian Urban Institute, Civic Engagement From Buzz Word To Meaningful Engagement
20. Ontario Sustainable Energy Association (OSEA) Search FX Conference
21. Futures Conference (First Work)
22. Youth Employment Partnerships (YEP), Serving Up Careers
23. Etobicoke Employment Ontario Service Providers Network Meeting
24. North York Employment Ontario Service Providers Network Meeting
25. IEP Conference
26. Women in ICT Roundtable
27. Canadian Business Leadership Forum
28. Multi-Cultural Businesses Networking Meeting

Appendix C — Consultation Framework

For this year's report the Toronto Workforce Innovation Group plans to focus on four sectors: Retail Trade, Arts and Culture, information and communications technology and construction. We have identified these sectors for the following reasons.

1. Retail trade is an important sector in Toronto and there are many employment opportunities beyond sales and service due to the concentration of head offices in the city. As a significant employer of youth, women, and IEPs, opportunities for advancement within this sector deserve more attention in order to move beyond the focus on sales and service

2. Arts and Culture is a sector that sets Toronto apart from the rest of Ontario. As stakeholders begin to consider a workforce development strategy for the city, new initiatives and opportunities are likely to arise. As the majority of those working in the sector are either working in small businesses or self-employed, the sector faces many limitations and difficulties in relation to training and capacity building.

3. ICT is another growth sector in Toronto, in particular in the area of new media, and mobile applications. With an unemployment rate of only 4.1% compared to Toronto's 9.4% rate, there are many opportunities to be taken advantage of within this sector.

4. Construction is an important sector in the city and there are significant projects and issues that will bring jobs and opportunity, such as the Pan Am games, neighbourhood renewal projects, Ontario's *Green Energy Act*, as well as the rising costs of energy and fossil fuels.

Consultation Plan

Our plan is to interview 2-3 representatives from each sector, contrasting opinions with labour market data, as well as using information gleaned through other major reports and research released over the past year. We will use this year's report to build upon TWIG's projects and research over the past few years, continuing to construct concrete recommendations for actions community partners can address.

Through combining approaches from TWIG's 2009 and 2010 TOP reports, we will focus on both sectoral analysis, as well as emerging issues, both within sectors and across sectors. For each sector we will ask general questions and then also ask questions that "look" through a specific lens. The "lenses" we are using are diversity (youth, women, immigrants/newcomers, ability/disability, mature workers), changing economy and green economy. There is some overlap in the issues and how they apply to each of the sectors. This approach will help narrow the focus for next year's action plan. The questions have been sorted into general questions, sector specific questions and then questions related to each "lens".

General Questions

1. What are the major issues/challenges facing your sector in Toronto today? Are there any issues that will likely have a significant impact on employment within this sector? Where will the jobs be? Where will job losses be?

2. What skills are currently in high demand? In the future?

3. Are there gaps or opportunities for training that would benefit the growth of the industry?

4. Where do you see this sector going? What might it look like in 2020?

5. Do you see any 'niche' or specialized markets emerging in your sector? Is the current labour force able to capitalize off of these opportunities what are the training and development issues associated with capitalizing off these emerging niches?

Changing Economy

1. Are there any emerging technologies affecting your sector? If so, who are they impacting and what needs to be done?

2. Do you see any "niche" or specialized markets emerging in your sector? Is the current labour force able to capitalize on any of these opportunities?

3. How does the rapid pace of change and fluctuating economic conditions affect your sector? What could be done to better help weather these changes?

4. Where do you see your sector in 2015? In 2020?

Diversity

1. How does/is an aging workforce affecting your sector? Are you seeing workers staying on past 65? Are you seeing increasing numbers of mature applicants? What are the difficulties associated with hiring and managing mature workers that the sector/management is not equipped to deal with? How do mature workers typically transition out of the workforce? What kinds of supports are available? Are you aware of supports available within the community for mature workers exiting the labour force?

2. How does your sector typically recruit youth or recent graduates into the field? What are the difficulties associated with hiring and managing youth that the sector/management is not equipped to deal with?

3. What types of complexities arise from managing a diverse workforce today? How could your sector be better supported in managing this diversity?

4. How is professional development accommodating to diversity or shifted/changed as a result of diversity? Are there any particular initiatives occurring within your sector aimed at workplace diversity that you find particularly useful?

5. Are those responsible for hiring able to assess the credentials and skills of IEP's applying for work in your sector? Where do difficulties in this process arise and what could be done to better support people in this process? What are the most significant barriers in place in regards to recruiting, hiring and retaining international talent for your sector? In what ways is the sector accommodating IEPs? What might

be done to create more welcoming workplaces? Are you aware of support services available to you to recruit and support IEPs? How does your association, union, council work with IEPs or it is seeking assistance? Are you aware of the various supports available to IEPs looking for work in your sector?

Green Economy

1. How has a greater focus on a green economy affected your sector? What changes would need to occur for your sector to begin to green or to continue to green?

2. How could your sector be better supported in developing/implementing green policies? Are you aware of government incentives/actions and/or resources available to your regarding this process?

3. Is there consensus on the benefits of green business amongst different levels of your sector? Are people on the "same page"?

4. How do greening business practices affect the types of skills and training employees must possess?

Appendix D — Consultation Participants

Barbara Williams Consulting

Canadian Business College

Career Edge

Centre for Education and Training

Centre of Excellence in Financial Services Education (CoE)/TFSA

ChangeCamp

CIBC

City of Toronto

COSTI

Davenport-Perth Neighbourhood Centre

East Toronto Social Services

Fred Victor Centre

George Brown College

Goodwill Toronto

Government of Ontario

JVS Toronto

Learning Enrichment Foundation

Legal Aid Ontario

McMaster University

MicroSkills Centre Toronto

Ministry of Citizenship and Immigration Ontario

Miziwebiik

NICORP Development

Ontario Literacy Coalition

PRISM Economics and Analysis

Rubin Thomlinson LLP and Associates

Ryerson University

Sheridan College

Skills for Change

Social Finance

Social Planning and Research Council of Hamilton

St. Stephen Community House

Tatla Diversity Group

The Canadian Council on Rehabilitation and Work

Toronto and Region Conservation Area

Toronto Catholic District School board (TCDSB)

Toronto City Summit Alliance

Toronto District School Board (TDSB)

Toronto Region Immigrant Employment Council (TRIEC)

Town of Peel

University of Toronto

Warden Wooods CC

Wellesley Institute

YMCA of Metropolitan Area

York Sustainable Enterprise Consultants

York University

Appendix E — Report on Innovative Approaches to Prosperity Consultation

The Toronto region is one of Canada's chief economic engines. Almost 1/5th of national GDP and 45% of Ontario's GDP are generated in the GTA. Despite our successes, Toronto is also a city of mixed economic achievement. Toronto's challenges include:

- A labour force that lacks the skills that employers need
- Post-secondary graduates who have difficulty establishing careers
- Highly educated newcomers who are slow to integrate to meaningful employment and are over-represented in entry level positions
- Job growth that occurs at both ends of the job spectrum: high-level, high-skilled and entry-level jobs leading to polarization of occupations and incomes.

Since 2001, economists have attributed Toronto's low economic growth to a "mismatch" between the skills possessed by much of the labour force and the skills many new jobs require. Some of the reasons for this "mismatch" include:

- the lack of an integrated approach to workforce development,
- the erosion of job security and the replacement of predictable career advancement with precarious employment and just-in-time training for just-in-time jobs,
- the continuing shift from manufacturing to service sector and knowledge work jobs,
- the expected retirement of baby-boomers leading to skills and labour shortages and
- the lack of investment in workplace training that is connected to lagging productivity.

Innovation is the key to prosperity and it relies on having a highly skilled, talented and educated workforce-something that Toronto has in abundance. The city is home to world class training institutions, the third largest financial services sector in North America and a thriving business sector.

The shift to a knowledge economy is clear in Toronto. Between 1996 and 2006, Knowledge Worker jobs were the only category that grew, increasing by 151,000 positions. Attracting, training and retaining this talent is key to innovative products, ideas and growth. With the growing importance of our knowledge economy, skills and educational requirements for workers will increase.

There are many other factors leading to innovation including investment and a strong entrepreneurial spirit. But at the core of innovation are people and great ideas.

One of Toronto's greatest strengths is our people. Every year we attract more highly skilled and educated people from around the world. Every year our local universities and colleges produce new talent. And every year, since 2001, the employment prospects for these groups have deteriorated. Newcomers struggle to find jobs to match their skills. Youth unemployment in Toronto is at an all time high. Meanwhile employers search the globe for talent and fear labour shortages in the near future.

Why aren't we using the talent that we have right here? Moreover, how do we stay ahead of the curve? How do we get away from a just in time reaction and bridge the gaps between industry, business, education to drive innovation and productivity forward?

These are the questions that were asked on November 22nd during the event "Innovative Approaches to Prosperity" that was organized by the Toronto Workforce Innovation Group" in partnership with MaRS Discovery District.

During this half day symposium, the panellists and the representatives from the key economic sectors, training institutions and non-profit organizations addressed both the opportunities and challenges endemic in our local economy. Participants also discussed ways to encourage innovation and economic growth.

This event focused on the following issues:

- The role of innovation in the economy
- Changing demographics and how to tap into diversity
- The increasing polarization between Toronto's rich and poor
- The role that collaboration can play in fostering innovative solutions to labour force development.

At the first part of the event almost 100 attendees listened to a rich and rewarding discussion of the three panellists: David Wolfe, Professor of Political Science at the University of Toronto, Catherine Chandler-Crichlow, Executive Director of Toronto Financial Services Alliance and John Tory the President of City Summit Alliance Group. The panel discussion was moderated by well-known Toronto Star columnist Carol Goar. The second part of the event was allocated to the table conversations. The discussion among the participants is noted below.

Table Conversations/Consultations

Question 1: Integrating Newcomers

Toronto traditionally is a magnet for newcomers to Canada. Half of Toronto's population was born outside of Canada. Although many immigrants come highly educated and skilled, they struggle to integrate into the Canadian workplace. The disparity between Canadian-born citizens and immigrants is growing. It now takes immigrants arriving in Toronto twice as long to integrate into the local economy as 10 years ago. The following questions were discussed by those participants who work directly with newcomers as well as by policy makers and analysts:

- How can we accelerate this process?
- What programs or supports are needed?
- What models are working?

Participant responses:

- Resources are needed to build connections between organizations working with newcomers. Currently there is a need for organizing financial support to allow non-government organizations to reach out beyond their current scope of work. They all agreed that it will be easier to integrate newcomers if there is a consistency in the messages that they are given, i.e. pre-post arrival and between organizations.
- Developing a clear-cut strategy for integrating newcomers and preparing them for life in Canada before their arrival would aid their more rapid integration into the workforce.
- Breaking down silos between agencies serving newcomers and introducing more collaboration and partnering across sectors would benefit newcomers. Some programs to integrate newcomers, i.e. mentorship and internship programs, co-op programs, showed good results. The round table discussion participants agreed that such programs should be replicated.
- Developing corporate incentives for investing in newcomers as employees is equally important.

Question 2: Increasing Polarization of Incomes

The increasing polarization of the workforce, with the decline of middle-level jobs, affects Toronto workers in entry-level positions — predominantly youth, newcomers and those without post-secondary education. Is it possible to change that dynamic? The participants of this round table, people who are familiar with the issue of income polarization first hand, said yes.

Participants identified the problems that contributed to the growing income disparity and made constructive suggestions regarding appropriate actions.

- Certification of foreign-trained professions is problematic. There is a need to take existing skills and put them to use, including recognizing existing credentials, removing barriers to employment and fostering innovation in the workforce in general.
- Trade jobs should be recognized as a sound job path and barriers to these types of jobs, i.e., gender equity, immigration status, income security programs, need to be addressed.
- Educational and re-training programs need to be substantive and forward-looking.
- Service Industry needs to be more innovative in terms of its HR. Wage Progression and career laddering requires improvement.
- Government and social policy generally needs to engender a sense of innovation.
- Streamline those who do have credentials vs. those who don't (in Trades in particular)
- Bring all levels of government together, break down silos and collaborate to develop a cross sectoral approach to economic investment
- Convene HR groups, professional associations and unions to tackle issues, e.g. Open Data Initiative, developing HR policies, coming up with approach for inspiring innovation from within

Question 3: High Levels of Youth Unemployment

Youth unemployment is currently very high in Toronto — twice that of adults in some areas. Many of the unemployed youth have not completed high school or college. What are the options that ought to be available for these youth?

The representative from the training/educational institutions and non profit organizations working with unemployed youth and youth at risk agreed on the following:

- Cooperative education programs are useful in preparing students and institutions for the needs of employers, and there is a need to match employers' demands with education system and training programs.
- There aren't enough career development strategic sessions and networking strategies.
- It's strategically important to develop some way of giving youth feedback. Focus on assets and promote career pathways where employers have identified deficits, i.e., insurance, accounting, financial planning, business administration, project management in construction.
- People in contact with youth need to act as advocates and dispel stereotypes.

Question 4: Working with Employers in a Coherent and Coordinated Way

Employers in Toronto don't want to be approached by many different groups and organizations. Relationship building is foundational to creating a Toronto workforce system. A strategic planning process requires intensive levels of communication to keep all key stakeholders informed and engaged. The participants of this round table looked at examples of best practices such as mentoring programs, speed mentoring, sector-specific job fairs.

They also talked about the challenges they face such as:

- Internal HR practices are not focused on hiring talented people but rather people who can do the job.
- Small and Medium Enterprises (SMEs) do not have HR infrastructure.
- Discrimination that happens in the hiring process and candidates vetted in numerous ways (based on their names, immigration status, place of residence, country of origin/ education, etc.)

The table discussion participants noted:

- Working with employers in a cohesive and coherent way is the key to success.
- Employers need to understand the benefits of working with government/non-profits for recruitment
- Government/non profits have to learn how to understand what businesses need/ want/are capable of doing in relation to hiring
- Employers have to be involved at all levels of decision making in relation to training, labour market planning

Conclusion

The event was a success. It was an opportunity for people representing different strata: business, government and non-profit, to sit together and share the ideas and suggestions regarding innovative solutions to the complex issues that face Toronto, solutions that ensure that our city and its residents all continue to grow and prosper, as an inclusive, cohesive metropolis. The attendees were interested in the work of the Toronto Workforce Innovation Group.

Toronto Workforce Innovation Group

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