

Toronto Training Board
2002-2003 Environment Scan Update
Current Challenges, Future Opportunities

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June 2002



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Cover design by Diego Spinelli

This publication is available on the World Wide Web at <http://www.ttb.on.ca>.

This document is available in alternative formats on request.

Aussi disponible en français sous le titre : *Commission de formation de Toronto, Analyse de la conjoncture — 2002–2003.*

Additional copies are available from:

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ISBN 1-894398-20-3

Printed in Canada

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Acknowledgements

The Toronto Training Board would like to thank its sponsors, Human Resources Development Canada (HRDC) and the Ontario Ministry of Training, Colleges and Universities (MTCU), for their support and funding of this project. The Social Services Division of the City of Toronto's Community and Neighbourhood Services also deserves recognition for its participation in and support of the activities of the Board. This report is produced by the Toronto Training Board and does not necessarily represent the views of any level of government.

The author would like to thank the many people who participated in consultations for this E-Scan and provided feedback on an early draft of the report, as well as her co-workers at the Toronto Training Board who gave ongoing assistance with the project.

Summary

1. Overview

The *2002-2003 Environmental Scan Update* (E-Scan) is the Toronto Training Board's fifth annual survey of labour force, training and adjustment issues in Toronto. This document brings together demographic information about Toronto, current labour market information, and information on new and/or emerging trends, opportunities and challenges related to training and adjustment.

The report contains demographic and labour market information provided by Statistics Canada, HRDC, MTCU and the City of Toronto, data gathered from books, journals, reports and newspaper articles, and information gained through consultations with organizations and individuals who are actively involved in training and adjustment in the GTA.

2. Changes in Toronto's Labour Force Supply

Population

Toronto is Canada's largest city and one of the most ethno-culturally diverse cities in the world. According to the 2001 Census, the population of the Toronto CMA grew by 9.8% between 1996 and 2001, to almost 4,683,000. Immigration was a major factor behind this population growth. More than 445,000 immigrants settled in the Toronto CMA between 1996 and 2001.

Labour Market Activity

Employment grew in the Greater Toronto Area (GTA) over the past year. However, because growth in the labour force outpaced the rise in the number of jobs, unemployment also increased.

Since May 2001, employment has increased by 1.8% or 48,700 jobs. Full-time jobs made up 85% of employment in the GTA in May 2002, an increase of nearly one percentage point from a year ago. Gains in full-time jobs were offset by a 15,100 drop in part-time employment.

The labour force has expanded by 84,300 since May 2001. The number of unemployed has increased by 35,600, pushing the unemployment rate up from 6.1% in May 2001 to 7.12% in May 2002. The youth unemployment rate has risen by 30% over the past year—from 11% in May 2001 to 14.3% in May 2002.

3. Changes in Toronto's Labour Force Demand

Job Market

Employment in the goods -producing sector was up by 18,700 jobs over the year, due almost entirely to a gain of 14.5% or 18,600 jobs in the construction industry. Most employment gains were made in the services -producing sector, which was up by 2.7% or 53,600 jobs over the past year.

Industry Outlook

Employers have a generally positive outlook on the prospects for economic growth in Toronto. However, some industries are expected to perform much better than others in the coming years.

Three industry clusters are expected to enjoy above average growth (more than 3.5% per year) in the 2004 -2006 period: Biotechnology; Information and Communication Technology (ICT); and Entertainment.

Four industry clusters are expected to have an average rate of growth (3.0% to 3.5% per year) in the 2004 -2006 period: Financial Services; Automotive Assembly and Parts; Business and Professional Services (BPS); and Food and Beverage Manufacturing.

Three industry clusters are expected to have a below average rate of growth (less than 3.0%) in the 2004-2006 period: Tourism, Aerospace Products; and Clothing and Textiles.

Occupational Requirements in Toronto

In general, the trend is towards growth in high and intermediate skill occupations. More specifically, current or forecast shortages exist for construction workers, physicians, nurses, pharmacists, teachers and information technology workers.

Employers are more concerned with the supply of specific vocational skills and experience than with interpersonal skills. Despite being aware of gaps, the majority of employers did not invest in training over the past year.

Basic Skills Required by Toronto Employers

Human Resources Development Canada (HRDC) reports that five general skill sets are required by Toronto employers: computer literacy; formal education; academic and problem-solving skills; literacy and numeracy skills; and interpersonal and communication skills.

4. Adjustment and Service Issues

Four themes predominate with regard to challenges and opportunities in Toronto's training environment.

Collaboration, Coordination and Information Sharing

A wide array of government agencies and service providers has been established to meet diverse objectives in the training and adjustment field. Better coordination among all the players would make for more efficient and effective provision of services, would help to eliminate overlap and close some of the gaps in service that appear when individuals fail to fit in one or another "envelope," and would ensure that "best practices" and innovative approaches are widely shared and adopted. Information sharing and access to a comprehensive inventory of training and support programs in the GTA would assist agencies and individuals in gaining the labour market, regulatory and service information they need to make effective decisions.

There is a consensus among those involved in training and adjustment in the GTA that more cooperation among the agencies that fund training and adjustment programs, community-based and private sector service providers, regulatory and licensing bodies, unions and employers is required.

Access to a Full Range of Programs and Supports

While money alone will not solve all of the problems in the training and adjustment system in Toronto, there was a consensus among the individuals and groups we consulted with that more investment by all partners is needed on a stable, multi-year basis in order to meet the long-term needs of a growing and globally competitive economy. Resources are needed for professional development within service agencies. More investment is also needed to ensure that people have access to programs before they fall into a crisis situation. Concerns were expressed that the criteria for accessing publicly-funded services are too restrictive and are, therefore, excluding many individuals who could benefit from these programs. Problems were also cited with respect to unrealistic "outcome-based" funding models that encourage "creaming" for those participants who are most likely to succeed in education and training programs.

More specific gaps were also identified in the areas of English as a Second Language (ESL), literacy and adult education programs, including high school equivalence programs for Francophones, and training and employment services for persons with disabilities.

People require access to a range of supports in order to participate and succeed in education and training programs. Essential resources include income while involved in a program, childcare and transportation. Part-time programs for people who are employed and/or caring for children or other family members, and for persons with disabilities who are not capable of studying or working full-time would also make the system more accessible. For people who have been out of the labour force for a long period of time

or are new to the country, psycho-social supports such as self-esteem building may also be needed to facilitate a successful transition into employment. At present, none of these supports are sufficient to meet the needs of the population of Toronto.

Recognition of International Credentials and Experience

Lack of recognition of skills, credentials and experience acquired outside Canada is a significant barrier to full participation in the labour force by newcomers. Furthermore, shortages in the trades and professions could be alleviated by a more open and accessible accreditation process. Assessment and bridging programs need to be expanded to include more occupations and assessment tools must be re-evaluated to ensure that testing is appropriate to actual job requirements. More education and involvement of employers is also needed to address this issue.

Measures to Address Shortages in the Trades

The construction industry is facing a critical shortage of skilled workers. The Universal Workers Union – Local 183 estimates that about 5,000 to 7,000 of their members will retire in the next five years. Similar trends appear in other union locals. Although there have been some positive developments in this area over the past year, much more needs to be done with respect to expanding pre-apprenticeship and apprenticeship programs, licensing foreign-trained tradespeople and attracting young people to the industry.

5. Conclusion

In order to meet the demand for skilled labour and to address the shortages in key occupations, Toronto needs a collaborative and well-coordinated training and adjustment system in which information about programs and supports is shared, and the needs of those who are in transition from school to work, unemployment to employment, career to career or nation to nation take centre stage.

This report identifies a number of pressing issues in Toronto's training and adjustment system that prevent it from meeting these goals. Taken together, these challenges represent an opportunity for all those involved in Toronto's training and adjustment community to work together to develop a vibrant, productive and inclusive workforce.

1. Introduction

1.1 Purpose of the 2002-2003 Environmental Scan

The *2002-2003 Environmental Scan Update* (E-Scan) is the Toronto Training Board's fifth annual survey of labour force, training and adjustment issues in Toronto. Like our previous reports, this document brings together demographic information about Toronto, current labour market information, and information on new and/or emerging trends, challenges and opportunities related to training and adjustment.

The Toronto Training Board takes a broad and comprehensive approach to training and adjustment issues. A skilled labour force is crucial to productivity and competitiveness in the global economy. Continuous change in the workplace creates an ongoing need for new and higher skill levels. Strong literacy, numeracy and basic skills are required for success in any labour market.

For the Toronto Training Board, "training and adjustment" includes issues, programs and initiatives that affect the extent to which, and the speed with which, people can secure gainful employment and, in consequence, contribute to the economic well-being of the community in general. Training and adjustment issues are most relevant to people making a transition from one stage in their lives to another—from school to work, unemployment to employment, career to career, nation to nation. We strongly emphasize the need for skills and competencies relevant to successfully completing these transitions, and the need for lifelong learning to facilitate ongoing adjustments to the changing labour market.

This E-Scan provides vital information about changes in Toronto's training environment to our sponsors, Human Resources Development Canada (HRDC) and the Ontario Ministry of Training, Colleges and Universities (MTCU). The report will also be widely shared throughout the training and adjustment community in Toronto.

1.2 Overview of the Environmental Scan

This report is divided into seven sections:

- Section 1 describes the purpose and content of the E-Scan.
- Section 2 summarizes the demographic, labour market, and training and adjustment information presented in last year's E-Scan.
- Section 3 outlines the methodology used to compile this report, and explains the report's validation process.

- Section 4 presents current information about Toronto 's labour force supply, including trends in population growth and labour market activity.
- Information related to labour force demand in Toronto is presented in Section 5, where we examine the Toronto job market, industry outlook, occupational requirements and the general skills required by Toronto's employers.
- The demographic and labour market information contained in Sections 4 and 5 provides the context for examining continuing and emerging challenges and opportunities in Toronto's training environment. These trends are examined in Section 6, with particular emphasis on the key issues emerging from recent labour market information, various reports and studies, as well as our consultations with individuals and groups who are directly engaged in training and adjustment activities in Toronto.
- Finally, in Section 7 we present our conclusions, with appendices and following.

2. Review of the 2001-2002 Environmental Scan Update

The *2001-2002 Environmental Scan Update* provided information and analysis on three key components of Toronto's training environment: characteristics of labour force supply, trends in labour force demand and selected training issues.¹

2.1 Labour Force Supply

The key trends in Toronto's labour force supply in 2001 -2002 related to population growth, unemployment and the rise of "flexible" work arrangements, particularly among youth in Toronto.

Toronto experienced rapid population growth, especially in the areas surrounding the City of Toronto. A growing proportion of Toronto's population was comprised of visible/racial minorities, a trend accompanied by employment and income barriers.

Unemployment was on the rise last year. From April 2000 to April 2001, the unemployment rate in the Greater Toronto Area (GTA) increased 0.7%, from 5.4% to 6.1%. There was also an increase in "flexible" work arrangements. Part-time employment accounted for over 60% of employment increases in the GTA in 2000 - 2001.

Unemployment and part-time work were especially prevalent among youth aged 15 -24, and among visible minority and Aboriginal youth. On a year over year basis, an 8% rise in part-time positions for youth in the Toronto CMA was offset by a 2.1% decline in full-time jobs.

2.2 Labour Force Demand

Several industries and occupations experienced declines last year while, at the same time, a number of shortages were reported. The basic skills required by the Toronto labour market were computer literacy, formal education, academic and problem-solving skills, literacy and numeracy skills, and interpersonal skills.

Toronto experienced job losses due to layoffs in the automotive industry and in the dot.com/new media sectors. However, demand for skilled high tech professionals remained strong. Three occupations in particular —construction workers, physicians and surgeons, and nurses —experienced shortages in Toronto. At the same time, large numbers of international medical graduates were unable to practice.

¹ Susan Brown (June, 2001). *Toronto Training Board 2001-2002 Environmental Scan Update: Training for Change*. Toronto: Toronto Training Board.

The labour force issues of concern to Toronto businesses included the decreasing availability of skilled manufacturing workers and technicians, the need for expanded pre-apprenticeship and apprenticeship programs, and improved language skills for the blue-collar workforce. Businesses also reported difficulty in finding skilled workers in the financial/business services and hospitality/entertainment industries.

2.3 Selected Training Issues in Toronto

Generally speaking, training challenges were identified in the areas of literacy and adult education, including high school equivalency programs for Francophones.

In March 2001, the Toronto Training Board organized two panel discussions in collaboration with several community partners:²

1. Training for Toronto's "New" Economy
2. Employment-Related Training for Immigrant Women

More specific issues were identified by each of these panels.

With respect to the "new" economy, the panel found that access to training and training supports had decreased for women, immigrants and refugees. It was also noted that youth were having difficulty obtaining work experience, and that the double cohort of high school graduates in 2003 would put even more pressure on the youth labour market. More access to apprenticeship programs was needed, especially for youth. Business, labour and government need to work together to develop new ideas and innovative learning methodologies, different operating models, and updated school and training curricula.

The Training for Immigrant Women panel highlighted the fact that the settlement challenges related to employment for newcomers are most pressing for women. These challenges include language barriers, lack of recognition of foreign skills and credentials, racism, lack of "Canadian experience" and inadequate access to training.

2.4 Conclusion

The 2001-2002 E-Scan concluded that Toronto was experiencing a slowing economy, an increasing number of layoffs, rising unemployment, and an increase in contingent and part-time work. There were also signs that the city would face a growing shortage of skilled workers over the next few years.

All indicators pointed to a need for a comprehensive, coordinated, and well-funded training and adjustment system in Toronto in order for the city and its businesses to be

² Ibid., p.47.

competitive in the global marketplace. Such competitiveness demands a highly -skilled workforce—technically and in terms of literacy, numeracy, critical thinking and interpersonal skills. Meeting this challenge requires more emphasis on life -long learning and incentives for employers to make training a priority.³

³ Ibid., p. 55.

3. Project Methodology

3.1 Data Collection and Analysis

This E-Scan updates information from the Toronto Training Board's E-Scan of June 2001. The report contains information gathered from three main sources:

1. Demographic and labour market information provided by Statistics Canada, HRDC, MTCU and the City of Toronto;
2. Secondary data from books, journals, reports, studies and newspaper articles drawn from a variety of sources and stakeholders;
3. Information gathered through consultations with key organizations and individuals who are actively involved in training and adjustment in the GTA. The groups and individuals who were invited to participate in the consultation process were umbrella groups representing the Board's labour market partners, organizations that work on and/or have expertise with the issues in last year's E-Scan, organizations that have identified immediate or emerging skills shortages for their industry and groups from sectors that had not yet formed a link with the Toronto Training Board. A complete description of the report's consultation and validation processes can be found in Appendix B.

3.2 Validation of Draft Report

A draft copy of this report was sent to the Board's Directors and the individuals who participated in the E-Scan consultations, along with a feedback form. Comments on the draft were incorporated into the final report.

4. Changes in Toronto's Labour Force Supply

This section presents demographic and labour force supply highlights for the Toronto Census Metropolitan Area (CMA) and the Greater Toronto Area (GTA).⁴ In combination with the trends in labour force demand documented in the following section, this information provides the context for training and adjustment issues in the region.

4.1 Population

Toronto is Canada's largest city and one of the most ethno-culturally diverse cities in the world. According to the 2001 Census, the population of the Toronto CMA grew by 9.8% between 1996 and 2001, to almost 4,683,000. Toronto's population growth has far outpaced the rate of 6.1% in Ontario and 4.0% in Canada over the same time period.⁵

Immigration was a major factor behind this population growth. More than 445,000 immigrants settled in the Toronto CMA between 1996 and 2001. Immigration added nearly 2% per year to Toronto's population over this period⁶

4.2 Labour Market Activity

Table 1—Labour Force Activity for the GTA⁷ (economic region 530) and the Toronto CMA, unadjusted data, three-month moving averages, May 2002 and May 2001

	May 2002 GTA	May 2002 Toronto CMA	May 2001 GTA	May 2001 Toronto CMA
Population 15+	4216800	4022600	4118000	3932000
Labour Force	2920800	2796300	2836500	2711700
Employment	2711100	2595800	2662400	2545800
Unemployment	209700	200500	174100	165900
Not in labour force	1296000	1226300	1281500	1220300
Participation Rate (%)	69.3	69.5	68.9	69
Unemployment Rate (%)	7.2	7.2	6.1	6.1
Employment Rate (%)	64.3	64.5	64.7	64.7

Source: HRDC, *Portrait Highlights: May 2002*.

⁴ See Appendix C for definitions of the Toronto CMA and the GTA.

⁵ Statistics Canada (2002). *A Profile of the Canadian Population: Where We Live*.
http://geodepot.statcan.ca/Diss/Highlights/Highlights_e.cfm.

⁶ Ibid.

⁷ HRDC reports Labour Force Survey results for the Greater Toronto Region (GTR) rather than the Greater Toronto Area. The two areas are the same, with the exception that the municipality of Burlington is not included in the GTR but is included in the GTA.

Table 1 above summarizes labour market activity for the GTA and the CMA for May 2002 and May 2001 (a list of definitions of terms used in this table can be found in Appendix D).

Employment grew in the GTA over the past year. However, because growth in the labour force outpaced the rise in the number of jobs, unemployment also increased. Since May 2001, employment has increased by 1.8% or 48,700 jobs. Full-time jobs made up 85% of employment in the GTA in May 2002, an increase of nearly one percentage point from a year ago. Gains in full time jobs were offset by a 15,100 drop in part-time employment.

The labour force participation rate has gone up and, in combination with population growth, caused the labour force to expand by 84,300 since May 2001. The number of unemployed has increased by 35,600, pushing the unemployment rate up from 6.1% in May 2001 to 7.2% in May 2002.⁸

Labour market prospects for youth have taken a turn for the worse since last year. Youth employment has dropped by 25,000 or 7% since May 2001. Both full-time and part-time youth employment have declined. The youth unemployment rate has risen by 30% over the past year—from 11% in May 2001 to 14.3% in May 2002.⁹

⁸ HRDC. *Portrait Highlights May 2002*, p. 1.

⁹ *Ibid.*, p. 2.

5. Changes in Toronto's Labour Force Demand

This section profiles the Toronto job market, industry outlook, occupational requirements and the general skills required by Toronto employers.

5.1 Job Market

Table 2 below summarizes employment changes on an industry -by industry basis for 2002 and 2001.

Table 2—Greater Toronto Employment by Industry (000s), First Quarter 2002 and First Quarter 2001

Industry	January to March 2002	Year/Year Change (%)	January to March 2001	Year/Year Change (%)
Total	2693.3	2.8	2621	3.5
<i>Goods-Producing Sector</i>	675	2.8	656.3	4
Agriculture	4.9	-41.7	8.4	-10.6
Forestry, Fishing, Mining, Oil and Gas	6	71.4	3.5	40
Utilities	23.6	9.3	21.6	-13.3
Construction	147.3	14.5	128.7	-5.2
Manufacturing	493.3	-0.2	494.2	7.8
<i>Services-Producing Sector</i>	2018.3	2.7	1964.7	3.4
Trade	424.7	2.1	416.1	5.4
Transportation and Warehousing	125.3	-5.4	132.5	4.6
Finance, Insurance, Real Estate and Leasing	237.6	4.3	227.7	1.3
Professional, Scientific and Technical Services	257	-2.5	263.6	11.1
Management, Administrative and Other Support	127.2	9.7	115.9	2.8
Education Services	154.6	12	138	-13.5
Health Care and Social Assistance	206	-1	208	1.2
Information, Culture and Recreation	140.5	-11.4	158.6	21.6
Accommodation and Food Services	150.9	26	119.8	-10.6
Other Services	101.3	-6.2	108	18.8
Public Administration	93.1	21.7	76.5	-9.5

Source: HRDC *Greater Toronto (Economic Region 530) Quarterly Labour Market Trends: First Quarter 2002*, Vol. 2, Issue 1 and HRDC *Greater Toronto (Economic Region 530) Quarterly Labour Market Trends: First Quarter 2001*, Vol. 2, Issue 1.

Employment in the goods -producing sector was up by 18,700 jobs over the year, due almost entirely to a gain of 14.5% or 18,600 jobs in the construction industry.¹⁰

¹⁰ HRDC. *Greater Toronto (Economic Region 530) Quarterly Labour Market Trends: First Quarter 2002*, Vol. 2, Issue 1, p. 2.

Most employment gains were made in the services -producing sector, which was up by 2.7% or 53,600 jobs over the past year. The accommodation and food services industry had the largest increase (31.1%), followed by public administration (16.6%) and educational services (12.0%).¹¹ Employment in the information, culture and recreation industry—including publishing, motion picture and sound recording, broadcasting and telecommunication services, and information and data processing —declined by 18,100 jobs or 11.4% over the past year.¹²

The first quarter of 2002 saw a gain of 6.3% or 29,000 jobs in the manufacturing industry, as manufacturers resumed production after depleting inventories in 2001. The services-producing sector shrank over the same time period, dropping by 1.4% or 29,000 jobs.¹³

5.2 Industry Outlook

Employers have a generally positive outlook on the prospects for economic growth in Toronto. However, some industries are expected to perform much better than others in the coming years. Taking these trends into consideration gives us a sense of where the job opportunities of the future will be found, as well as the kind of labour force Toronto will need.

The Toronto Board of Trade's 2002 membership survey of policy issues found that 65% of members believe Toronto's economy will perform better in a year's time, while 73% expected the revenues of their company to increase over the next year. Optimism about growth in the coming year was strongest among respondents in the financial services sector (83%), professional services (78%) and telecommunications (78%).¹⁴

In a May 2002 report on the economic strengths and weakness of the GTA, TD Economics explained that economic growth is increasingly driven by a number of industry clusters that are among the largest and most competitive in the world.¹⁵ An industry cluster consists of a network of inter-connected private sector industries and public sector institutions. The production output of the clusters reaches markets outside

¹¹ Ibid.

¹² Ibid.

¹³ Ibid., p. 1.

¹⁴ Toronto Board of Trade (March 2002). *Policy Issues Member Survey*. <http://www.bot.com/home6press.html>.

¹⁵ TD Economics (May 22 2002). *The Greater Toronto Area (GTA): Canada's Primary Economic Locomotive in Need of Repairs*. TD Bank Financial Group, p. 6. www.td.com/economics. See also Institute for Competitiveness and Prosperity (April 2002). *A View of Ontario: Ontario's Clusters of Innovation*, Working Paper No. 1. www.competeprosper.ca/.

of the region. The centre of a cluster is made up of exporting firms, while the rest of the cluster is composed of suppliers to the industry and supporting agencies.

According to TD Economics, Toronto's top ten clusters are:¹⁶

1. Financial Services
2. Automotive
3. Biomedical and Biotechnology
4. Entertainment
5. Food and Beverage Manufacturing
6. Aerospace
7. Business and Professional Services
8. Tourism
9. Information and Communications Technology
10. Clothing and Textiles

TD Economics projects a positive outlook for the GTA's key industries over the next four years. An economic upturn has been kick-started by a rise in US demand for the region's manufactured goods and, with growth in the manufacturing sector expected to continue through 2003, real GDP growth is forecast at 3.3% this year and just over 4.0% in 2003. Employment growth is expected to average 2.5% per year this year and next, while the unemployment rate is projected to fall from the current rate of 7% to about 6% by the end of 2003.¹⁷

Three industry clusters are expected to enjoy above average growth (more than 3.5% per year) in the 2004-2006 period: Biotechnology; Information and Communication Technology (ICT); and Entertainment.

Toronto is home to one of the largest biotech centers in North America. The biotechnology sector has been a growth leader in recent years. The Ontario government's newly announced \$51 million Biotechnology Strategy may promote further growth in the industry. \$20 million has been allocated to the MARS (medical and related sciences) Discovery District, a community of researchers and companies in downtown Toronto working toward innovation in medical and related sciences.¹⁸

While ICT equipment manufacturers were hard hit by the collapse of high tech investment in late 2000, ICT service industries (including software development) have continued to expand at a favourable rate. TD Economics expects demand for ICT equipment to begin to recover in 2003, as the trend towards adoption of information

¹⁶ TD Economics (May 22 2002). *The Greater Toronto Area (GTA): Canada's Primary Economic Locomotive in Need of Repairs*. TD Bank Financial Group, p. 6. www.td.com/economics.

¹⁷ Ibid., p. 7.

¹⁸ Ibid.; Government of Ontario (June 7 2002). "Ontario Launches \$51 Million Strategy to Become Global Leader in Biotech Research." <http://www.premier.gov.on.ca/english/news/Biotech060702.htm>.

technology and Internet-related products re-emerges. The new media industry has the brightest growth prospects within this cluster.¹⁹

Although the media industry suffered a slowdown in advertising revenues and continues to face challenges to adjust to the convergence of telecommunications and broadcasting firms, it is expected to enjoy a recovery this year, due in part to the general strengthening of the Canadian economy. The efforts of the City of Toronto and the Ontario government to promote the region as “Hollywood North”—including two new film studios planned for Toronto’s port lands—may spur expansion of the film industry over the long run.²⁰

Four industry clusters are expected to have an average rate of growth (3.0% to 3.5% per year) in the 2004-2006 period: Financial Services; Automotive Assembly and Parts; Business and Professional Services (BPS); and Food and Beverage Manufacturing.

Canadian banks are increasingly engaged in offshore investment. According to TD Economics, many of the jobs and much of the revenue generated from foreign operations comes back to Canada. This trend is, therefore, expected to deliver significant benefits to Canada as a whole and the GTA in particular.²¹

Production in the automotive industry appears to be recovering after an 18-month slump. However, the industry continues to face challenges in the form of over-capacity and competition from Mexico. Plant closures at Ford’s light truck assembly plant in Oakville, Daimler-Chrysler’s light truck plant in Windsor and GM’s car assembly plant in St. Therese will have a negative impact on the GTA’s large parts industry.²²

The BPS cluster has experienced steady growth in recent years due to access to the GTA’s well-educated workforce and the ongoing trend towards the contracting out of services.²³

The food and beverage manufacturing industry has also grown over recent years.²⁴

Three industry clusters are expected to have a below average rate of growth (less than 3.0%) in the 2004-2006 period: Tourism, Aerospace Products; and Clothing and Textiles.

¹⁹ TD Economics (May 22 2002). *The Greater Toronto Area (GTA): Canada’s Primary Economic Locomotive in Need of Repairs*. TD Bank Financial Group, p. 7. www.td.com/economics.

²⁰ Ibid., p. 7-8.

²¹ Ibid., p. 8.

²² Ibid.

²³ Ibid.

²⁴ Ibid.

Tourism is one of the GTA's largest employers but the industry's position has been dropping over recent years. The Toronto Convention and Visitors Association reports that the number of tourists to Toronto has been falling for the past five years — from 16.6 million people in 1996 to 16 million last year —resulting in the loss of several thousand jobs. The low Canadian dollar helped the industry recover from the post - September 11th downturn. Looking ahead, however, tourism in the GTA faces a number of challenges, including a declining position relative to its key competitors. Several new projects could help to bolster the industry, including completion of the first stage of expansion of Pearson Airport (scheduled for 2004), development of the Dundas -Yonge shopping area, and additions to the Royal Ontario Museum and the Art Gallery of Ontario.²⁵

The aerospace industry in the GTA has historically been concentrated in commercial rather than military aircraft. The rise in US defense spending, coupled with the high fleet capacity of commercial airlines, would indicate that the industry does not have bright prospects in the near term. The lack of a major company headquarters also has negative implications for the development of a globally competitive aerospace cluster.²⁶

Although the clothing and textiles sector was hit hard by free trade in the early 1990s, the sector is slowly recovering its position as a dominant industry cluster in the GTA. Product specialization in high -end fashion design and manufacturing has facilitated recent growth in the industry. However, free trade remains a significant challenge as production continues to shift to lower wage countries. TD Economics points out that one way in which the competitiveness of this industry cluster could be improved lies in the development of the skills of its workforce. Currently, over half of workers in the industry have not graduated from high school.²⁷

5.3 Occupational Requirements in Toronto

This section provides more specific information about occupational trends in Toronto. In general, the trend is towards growth in high and intermediate skill occupations. More specifically, current or forecast shortages exist for construction workers, physicians, nurses, pharmacists, teachers and information technology workers.

²⁵ 2001 Facts, Toronto Convention and Visitors Association Research's Publication, cited in TD Economics (May 22 2002). *The Greater Toronto Area (GTA): Canada's Primary Economic Locomotive in Need of Repairs*. TD Bank Financial Group, p. 9. www.td.com/economics; TD Economics (May 22 2002). *The Greater Toronto Area (GTA): Canada's Primary Economic Locomotive in Need of Repairs*. TD Bank Financial Group, p. 9. www.td.com/economics.

²⁶ TD Economics (May 22 2002). *The Greater Toronto Area (GTA): Canada's Primary Economic Locomotive in Need of Repairs*. TD Bank Financial Group, p. 10. www.td.com/economics.

²⁷ Ibid.

As part of its Labour Force Readiness Project, the City of Toronto sponsored a survey of employers about occupational change over the past 12 months, expected changes in the next 12 months, skills gaps and investment in training. The survey results are organized according to whether the skill level of the occupation is “high,” “intermediate,” or “lower.”²⁸

In the past year, occupations at all skill levels increased, although least so for those in the lower skill category. Employers reported that three high skill occupations had grown: professional business and finance; computer programmers; and policy researchers and consultants. In the intermediate skill level, three occupations experienced increases: office clerical; retail sales; and graphic designers. Lower skilled occupations increased only for trades helpers and labourers.

Employers cited no declines in the high skill occupations over past 12 months. Declines were reported in the intermediate skill occupations of skilled and intermediate sales and service, skilled food and beverage occupations, and machines operators and assemblers. Among lower skill occupations, decreases were reported among food and beverage helpers.

Over the next year, employers anticipate growth in occupations at all skill levels, while expected decreases occur only for “intermediate skill” occupations. Employers expect the occupations of professional business and finance, computer programmers, and policy researchers and consultants to continue to grow in the high skill sector. Among intermediate skills, skilled trades such as electrician, carpenter and plumber, and retail sales are expected to increase. Employment in the lower skill occupations of janitor, cleaner and cashier is also expected to grow.

Decreases are anticipated in the intermediate skill occupations of general office skills, and machines operators and assemblers, and the lower skill occupation of food and beverage helper.

17% of employers identified skills gaps in the areas of occupational specific skills, basic high school education, management skills and second language skills. Generally speaking, employers’ concern with skills was related to specific vocational skills and experience, rather than interpersonal skills. Despite being aware of these gaps, however, a majority (61%) of the employers surveyed indicated that they had not invested in training over the past year.

Last year’s E-Scan reported shortages of construction workers, physicians and surgeons, and nurses. This year, the research indicates that those shortages remain and that demand will outweigh supply now or in the near future for pharmacists, teachers and skilled information technology workers.

²⁸ John Gladki, GHK International (February 2002). *Toronto Labour Force Readiness Project*, presentation given at the Intergovernmental Committee on Economic and Labour Force Development (ICE) Network Meeting 2002. www.a4s.org/ICEN/ICEN-meeting2002.pdf.

The construction industry continues to face shortages in several trades. Demand for skilled workers has increased due to large construction projects such as the Lester B. Pearson Airport and the condominium boom. The skill shortages seem to be most serious in residential construction, a sector that competes for available skills with large projects that offer higher wages.²⁹

In the health care industry, shortages exist for physicians, nurses and pharmacists. The Canadian Association of Chain Drug Stores recently reported that 2,000 pharmacists are needed across the country. A recent survey by the Ontario Hospital Association found that the vacancy rate for pharmacists is up to 13%, while pharmacists are working more overtime than doctors and nurses.³⁰

According to HRDC, there is a shortage of family doctors as well as specialists in radiology, emergency care and oncology. Ontario continues to have a lower number of nurses per capita than the Canadian average. The Registered Nurses Association of Ontario estimates that as many as 90,000 new nurses will be needed in Ontario over the next ten years.³¹

More than 27,000 teachers in Ontario have taken early retirement since 1998, creating a shortage of both supply and full-time teachers in Ontario's school system. With as many as six out of ten principals ready to retire by 2005, the teaching shortage is expected to increase.³²

A new study undertaken for the Information Technology Association of Canada (ITAC) forecasts that the demand for skilled information technology (IT) workers will soon outpace supply as it has in the past.³³ ITAC's research also found that women continue to be underrepresented in the IT workforce. The ratio of men to women in Ontario's IT industry is 76:24, in comparison with a ratio of 54:46 for the Ontario workforce as a whole. One solution to the shortage of skilled IT workers, as noted by ITAC's CEO Gaylen Duncan, would be doing a better job of attracting women to the field.³⁴

²⁹ HRDC (January-March 2002). *Labour Market Bulletin: Toronto Labour Market News*, p. 3.

³⁰ *Ibid.*, p. 8.

³¹ HRDC (October 2001). *Future Focus 2001: Occupational Trends in the Greater Toronto Area*, p. 13; Registered Nurses Association of Ontario (May 23 2001). "Modest improvements in nursing workforce statistics are proof that we must stay the course says Registered Nurses Association of Ontario." www.rnao.org/pdf/mediaReleases/CIHI%20-%20May23.01.pdf.

³² HRDC (October-December 2001). *Labour Market Bulletin: Toronto Labour Market News*, p. 4-5; Toronto Star October 10 2001).

³³ Information Technology Association of Canada (May 6 2002). "IT Skilled Labour Shortage Returning in 2002." www.itac.ca.

³⁴ Information Technology Association of Canada (May 14 2002). "ITAC Study Reveals IT Worker Gender Gap." www.itac.ca.

Owners of small businesses also report persistent labour shortages. A survey conducted among the Canadian Federation of Independent Business' 102,000 members during the first three months of 2002 found that 26% of firms surveyed had at least one job open because they were unable to find people with suitable skills.³⁵

5.4 Basic Skills Required by Toronto Employers

Last year we reported that five general skill sets were required by Toronto employers. According to HRDC, those basic requirements remain the same this year.³⁶

1. Computer literacy —the widespread adoption of computers and high-tech equipment have made computer skills essential for the majority of jobs.
2. Formal education —inequalities in job opportunities and income are growing between workers with higher levels of education and those with less than high school education. Educational requirements continue to rise. High school education is essential while post-secondary education or training is increasingly necessary in order to compete in a knowledge-based economy.
3. Academic and problem-solving skills —employers in all industries increasingly need staff who have abilities in applied math and science, and who have the academic background required to work in a technical environment. Workers also need strong problem-solving skills and a commitment to lifelong learning.
4. Literacy and numeracy skills —Strong literacy and numeracy skills improve workers' performance in all jobs and enhance their job opportunities.
5. Interpersonal and communication skills —With a drop in middle management, more jobs involve self-directed teamwork and group decision-making. Employees need to be able to work well with clients, customers and co-workers, and utilize a variety of media. Excellent communications skills are considered essential for more and more jobs.

³⁵ Mallett, Ted (2001). *Help Wanted: Update*. Toronto: Canadian Federation of Independent Business.

³⁶ HRDC (October 2001). *Future Focus 2001: Occupational Trends in the Greater Toronto Area*, p. 2-3.

6. Adjustment and Service Issues

Continuing and emerging challenges and opportunities in Toronto's training environment are examined in this section. This discussion is based on a review of labour market information, various reports and studies, and our consultations with key informants.

Four themes predominate with regard to barriers and opportunities in Toronto's training environment. These themes are not new. Rather they reflect issues and concerns that have been highlighted in previous E -Scans, and that continue to reflect training and adjustment needs in Toronto. The four themes are:

1. Collaboration, Coordination and Information Sharing—better cooperation among the different jurisdictional levels, service providers, regulatory and licensing bodies, unions and employers is required.
2. Access—workers, whether they are employed, underemployed or unemployed, need access to a full range of programs and supports.
3. Recognition of International Credentials and Experience —Many newcomers face barriers to employment because their skills, credentials and experience are not recognized.
4. Measures to address shortages in the trades —several trades face critical shortages. Strategies are needed to overcome this challenge.

6.1 Collaboration, Coordination and Information Sharing

A wide array of government agencies and service providers has been established to meet diverse objectives in the training and adjustment field. Better coordination among all the players would make for more efficient and effective provision of services, would help to eliminate overlap and close some of the gaps in service that appear when individuals fail to fit in one or another "envelope," and would ensure that "best practices" and innovative approaches are widely shared and adopted. Information sharing and access to a comprehensive inventory of training and support programs in the GTA would assist agencies and individuals in gaining the labour market, regulatory and service information they need to make effective decisions. There is a consensus among those involved in training and adjustment in the GTA that more cooperation among the agencies that fund training and adjustment programs, community -based and private sector service providers, regulatory and licensing bodies, unions and employers is required.

For organizations working with newcomers to Canada, collaboration means removing the jurisdictional boundaries between settlement and training/employment services. For Francophones, coordination means establishing an umbrella organization for those who

provide Francophone literacy, training and employment services at all levels in the GTA. For the private vocational schools, collaboration, coordination and information sharing means consistent funding parameters, and speeding up the process of funding and course approval by government. For virtually all of the participants in our consultation process, a formal way of bringing everyone together would help the individuals who need services find an appropriate program and help those who provide the services to do a better job.

Lack of awareness and involvement by employers was repeatedly cited as a significant barrier to training. Increased participation in the system by employers would provide more comprehensive and up-to-date information about the kinds of skills required, as well as more entry-level jobs, apprenticeship positions and on-going training for workers. Our key informants lamented what they perceived as a lack of a “training culture” that would both increase employers’ awareness of training needs and issues, and provide concrete and easily accessible incentives for employer investment in training. Lack of employer awareness of the skills of new immigrants and persons with disabilities was also cited as a barrier to employment for these groups.

6.2 Access to a Full Range of Programs and Supports

Participants in our consultations identified a number of gaps and barriers in existing training and adjustment services in the GTA. There was a consensus that more needs to be done to ensure that a comprehensive range of appropriate training programs is available, and that people have access to the supports they need to effectively participate in education and training programs.

Access to a Comprehensive Range of Programs

While money alone will not solve all of the problems in the training and adjustment system in Toronto, there was a consensus among the individuals and groups we consulted with that more investment by all partners is needed on a stable, multi-year basis in order to meet the long-term needs of a growing and globally competitive economy. Resources are needed for professional development within service agencies. More investment is also needed to ensure that people have access to programs *before* they fall into a crisis situation. Concerns were expressed that the criteria for accessing publicly-funded services are too restrictive and are, therefore, excluding many individuals who could benefit from these programs. Problems were also cited with respect to unrealistic “outcome-based” funding models that encourage “creaming” for those participants who are most likely to succeed in education and training programs. Gaps were also identified in specific training and adjustment programs and services.

In our 2001-2002 E-Scan, we noted that challenges existed in the areas of ESL, literacy and adult education programs, including high school equivalency programs for Francophones in the GTA. These are still pressing issues that need to be addressed. Existing ESL, literacy and basic skills programs do not adequately meet the needs of Toronto’s diverse population.

Language training for newcomers who are not fluent in French or English is an essential first step toward successful integration into the labour market and the community. This training must go beyond the basics to include conversational skills and occupation-specific terminology. Our key informants reported that long waiting lists exist for many programs, eligibility criteria are too restrictive, and there is frequently a mismatch between programs and client needs.

All adults who lack basic literacy and numeracy skills have a difficult if not impossible time finding and keeping a job. A recent survey of people in Toronto who left Ontario Works (OW) in the first quarter of 2001 found that poverty remains a trap from which it is difficult to escape. Only 43% of the 800 people surveyed said that their finances had improved after leaving social assistance. 17% returned to OW in 2001. Those who returned were more likely to have less than a high school education. 38% of respondents said that they required access to education and skills upgrading to help them keep their current job or find a better one.³⁷

Last year we reported that the settlement challenges related to employment for newcomers are most pressing for women. These challenges include language barriers, lack of recognition of foreign skills and credentials, racism, lack of Canadian experience and inadequate access to training. Little has changed on this issue over the past year.

A new study by the Working Skills Centre of Ontario reports that there is a high prevalence of underemployment in low-skilled and low-waged positions among immigrant women. Consultations with immigrant women, workers from community-based agencies, employers, business improvement area boards and ethno-specific chambers of commerce revealed that these women face multiple barriers to achieving meaningful and sustainable employment. Employers considered Canadian work experience (paid or voluntary) an asset, and fluency in spoken English and popular computer software packages essential. Lack of access to subsidized childcare and the financial resources to engage in language and labour market training restricts the choices open to women, and contributes to the economic marginalization of immigrant women in general and visible minority women in general.³⁸

Our E-Scan last year identified a shortage of adult education programs for Francophones. This reality remains unchanged. Francophones living in the GTA, many of whom are new immigrants and refugees, have no access to adult education programs beyond basic literacy. There is no next step or bridge that would allow people to complete a high school diploma. This is a major barrier to post-secondary education and employment.

³⁷ City of Toronto, Community and Neighbourhood Services (May 2002). *After Ontario Works: A Survey of people who left Ontario Works in Toronto in 2001*.

³⁸ Working Skills Centre of Ontario (May 2002). *From the "Canadian Work Experience" Dilemma to Canadian Labour Market Participation: Programs and Strategies for Marginalized Immigrant Women, Draft Report*. Toronto: Working Skills Centre.

Consultations with key informants also revealed significant gaps and disincentives in training and employment services for persons with disabilities, particularly those who live with cyclical or recurrent illnesses, as well as persons with learning disabilities. Persons with disabilities require accommodation in both the education and training system and in the workplace in order to function to their full potential as learners and employees. Neither general education and training programs, nor the specialized initiatives that are currently in place are insufficient to meet the needs of the estimated 10% of the population who have a learning disability. Moreover, persons living with HIV/AIDS and mental health disabilities, for example, often face a “catch -22” situation in which they risk losing access to the economic assistance provided by the various federal and provincial support programs if they engage in training and employment.

Key informants who work in this area told us that some of the programs that currently serve persons with mental health disabilities are unsuccessful in helping them gain employment because the kind of training provided is inappropriate to finding and keeping a job, does not adequately accommodate the unique needs of this population and/or is based on a myth that persons with mental disabilities do not want or cannot keep a job. Evaluation of current approaches and outcomes may improve the effectiveness of education, training and support programs for this population.

Access to Supports for Training

In order to participate and succeed in education and training programs, people require access to a range of supports. Essential resources include income while involved in a program, childcare and transportation. Part-time programs for people who are employed and/or caring for children or other family members, and for persons with disabilities who are not capable of studying or working full-time would also make the system more accessible. For people who have been out of the labour force for a long period of time or are new to the country, psycho-social supports such as self-esteem building may also be needed to facilitate a successful transition into employment. At present, none of these supports are sufficient to meet the needs of the population of Toronto.

Our key informants cited many instances in which individuals were prevented from enrolling in or completing a course, or from taking a job, because they did not have access to affordable childcare, could not afford transportation or did not have enough income to sustain them through the duration. They also stated that the problem seems to be getting worse.

A January, 2002 report by the Women and Economic Development Consortium clearly explains the value and effectiveness of a holistic “sustainable livelihoods approach” to social and economic well-being. The Consortium makes a useful distinction between short-term “coping strategies” and longer-term “adaptive strategies.” Coping strategies such as looking for a new job or using a foodbank are “essentially about survival and they can trap people in the present.” In contrast, adaptive strategies allow individuals to

build assets such as education levels. Reducing social and economic vulnerability in the future requires a comprehensive approach in the present.³⁹

6.3 Recognition of International Credentials and Experience

In our previous E-Scans we reported that lack of recognition of skills and experience acquired outside Canada is a significant barrier to full participation in the labour force by newcomers. We also reported that some occupational shortages could be alleviated by a more open and accessible licensing and certification process.

Our E-Scan last year found that there was a shortage of physicians and surgeons in Toronto despite the presence of a large number of foreign-trained professionals who could help to fill the gaps. In November 2001, the Council of Ontario Faculties of Medicine, the College of Physicians and Surgeons of Ontario and the Ministry of Health and Long-Term Care initiated a new Assessment Program for International Medical Graduates. The project will recruit and assess up to 40 foreign-trained specialists per year and direct them into practice in under-served Ontario communities.⁴⁰

In April 2002, the government of Ontario allocated \$3.6 million a year for three years to develop effective programs that will allow qualified foreign-trained Ontarians to meet provincial standards.⁴¹ The funds will be used to develop pilot “bridge training programs”⁴² in nine sectors experiencing skills shortages. The programs are expected to be in operation and accepting participants by the end of 2004.

While these initiatives are welcome improvements to the system by which internationally-trained workers are accredited to practice their trades and professions here, our key informants and recent research indicate that not enough is being done. Participants in our consultations continue to work with a larger number of newcomers who have not been able to get their credentials certified. They would also like to see the

³⁹Women and Economic Development Consortium (January 2002). *Women in Transition Out of Poverty: A Guide to Effective Practice in Promoting Sustainable Livelihoods Through Enterprise Development*. <http://www.cdnwomen.org/eng/3share/WIT02eng.pdf>.

⁴⁰HRDC (October-December 2001). *Labour Market Bulletin: Toronto Labour Market News*, p. 7; Toronto Star (October 9 2001); www.cou.on.ca/Health/HOME/IMG/IMGHomePage.htm; Association of International Physicians and Surgeons of Ontario (AIPSO) (April 2002). *Integrating Canada's Internationally-Trained Physicians: Towards a Coherent, Equitable and Effective National System for the Integration of Internationally-Trained Physicians*. Toronto: AIPSO.

⁴¹Government of Ontario (April 2 2002). “Provincial government invests over \$3.6 million to get foreign trained workers on the job.” www.edu.gov.on.ca/eng/document/nr/02.04/nr0403.html.

⁴²Bridge programs “provide an opportunity for international-trained workers to upgrade their qualifications to Ontario standards by acquiring any additional education and skills, such as language training, they may need without duplicating the achievements they gained prior to coming to Ontario.” Ontario Ministry of Training Colleges and Universities (Fall/Winter 2001). *Update: Helping Foreign-Trained Workers Reach their Full Potential*. www.edu.gov.on.ca/eng/general/postsec/foreignne.pdf.

assessment and bridging programs that currently exist expanded to include more occupations as well as a re-evaluation of assessment tools to ensure that testing is appropriate to actual job requirements. Finally, more education and involvement of employers is needed to address this issue. Employers could be made more aware of the availability of skilled newcomers who can meet their labour needs, and of the certification and assessment programs that exist.

These concerns are supported by published literature on the subject. A recent study by University of Toronto Professor Jeffrey Reitz found that the Canadian economy is losing up to \$2.4 billion because the skills of immigrants are underutilized and up to \$12.6 billion because they are underpaid.⁴³ Research by the Canadian Council on Social Development indicates that recent immigrants to Canada experience higher unemployment than recent immigrants 15 years ago, while the poverty rate for recent immigrants (27%) is double the Canadian average (13%) in the rest of the population. The Council concludes that, among other measures needed to speed up the process of integration and address issues of disadvantage, recognition of foreign credentials must be improved.⁴⁴

6.4 Measures to Address Shortages in the Trades

The construction industry continues to face a critical shortage of skilled workers. The Universal Workers Union – Local 183 estimates that about 5,000 to 7,000 of their members will retire in the next five years.⁴⁵ Similar trends appear in other union locals. Although there have been some positive developments in this area over the past year, much more needs to be done with respect to expanding both pre-apprenticeship and apprenticeship programs, licensing foreign-trained tradespeople and attracting young people to the industry.

The government of Ontario announced this spring that it is investing \$3.7 million in a Pre-apprenticeship Training Program.⁴⁶ A further \$5 million will be invested as part of a five year, \$50 million commitment to modernize training facilities for apprentices at Ontario's community colleges. Announced in the 2001 provincial budget, the Apprenticeship Enhancement Fund will help to upgrade equipment and facilities for

⁴³ Jeffrey Reitz (2002). *Immigrant Skill Utilization in the Canadian Labour Market: Implications of Human Capital Research*. www.newsandevents.utoronto.ca/bin2/020318a.asp.

⁴⁴ Canadian Council on Social Development (February 2002). *Does a Rising Tide Lift all Boats: The Labour Market Experience and Incomes of Recent Immigrants (1995-1998)*. Ottawa: Canadian Council on Social Development. www.ccsd.ca; see also Naomi Alboim and the Maytree Foundation (April 2002). *Fulfilling the Promise: Integrating Immigrant Skills into the Canadian Economy*. Ottawa: Caledon Institute of Social Policy. www.caledoninst.org.

⁴⁵ HRDC (January-March 2002). *Labour Market Bulletin: Toronto Labour Market News*, p. 3; Globe & Mail (March 5 2002); National Post (March 16 2002).

⁴⁶ Government of Ontario (March 21 2002). "The Ontario government invests \$3.7 million for skilled workers." www.edu.gov.on.ca/eng/document/nr/02.03/nr0321.html.

apprenticeship programs, increase the number of apprentices, improve classroom instruction and remove barriers to training for persons with disabilities.⁴⁷

Additional steps that would more adequately address the issue of skilled trade shortages include ensuring that school curricula contain high quality and up-to-date shop programs and present apprenticeships as viable career options for students, and reassessing the academic requirements for entering an apprenticeship program. Most programs require at least a grade ten education and many now require a high school diploma. This can present an unnecessary barrier, especially for new immigrants. Employers also need to be encouraged to invest more in training.

⁴⁷ Government of Ontario (May 28 2002). "Ontario invests \$5 million in apprenticeship training to strengthen economic growth." www.edu.gov.on.ca/eng/document/nr/02.05/nr0528.html.

7. Conclusion

This E-Scan has drawn together labour market information provided by Statistics Canada, HRDC, MTCU and the City of Toronto, secondary research reports and articles, and information provided by key informants who are actively engaged in training and adjustment programs in order to develop a portrait of changes in labour force supply and demand in Toronto. The E-Scan also examines the major opportunities and challenges in Toronto's training environment.

Employment continues to grow in Toronto but, because growth in the labour force has outpaced the rise in the number of jobs, unemployment has also increased. Youth unemployment has risen dramatically over the past year. As in previous years, most employment gains were made in the services-producing sector, although the construction industry posted a healthy 14.5% increase.

Research indicates that employers in Toronto have a positive outlook on the prospects for economic growth in Toronto. The leading industries will require a skilled workforce. Several occupations, including construction workers, physicians, nurses, pharmacists, teachers and information technology workers, face critical shortages.

In order to meet the demand for skilled labour and to address the shortages in key occupations, Toronto needs a collaborative and well-coordinated training and adjustment system in which information about programs and supports is shared, and the needs of those who are in transition from school to work, unemployment to employment, career to career or nation to nation take centre stage.

There are a number of pressing issues in Toronto's training and adjustment system that prevent it from meeting these goals. More cooperation among the agencies that fund training and adjustment programs, community-based and private service providers, regulatory and licensing bodies, unions and employers is needed. Also needed is an expansion of several basic and necessary education and training programs. Newcomers who are not fluent in either English or French, people who lack literacy and basic skills, Francophones and persons with disabilities do not have access to a comprehensive and effective set of programs to address their unique needs. Many others, including immigrant women and youth, lack the income, childcare and transportation they require to participate and succeed in education and training programs. Lack of recognition of skills and experience acquired outside Canada remains a significant barrier to participation in the labour force by newcomers. Finally, expansion of apprenticeship programs and outreach to attract young people to the construction industry are needed to meet growing labour shortages.

These challenges are not new. They echo the issues and concerns that were highlighted in previous E-Scans. Taken together, they represent an opportunity for all those involved in Toronto's training and adjustment community to work together to develop a vibrant, productive and inclusive workforce.

Appendix A—The Toronto Training Board

The Toronto Training Board

The Toronto Training Board addresses training and adjustment issues in the Toronto area, and is one of 21 local boards in Ontario. The Toronto Training Board is an independent, not-for-profit corporation governed by a volunteer Board of Directors that represents seven labour market partners: business, labour, women, persons with disabilities, visible/racial minorities, Francophones and educators/trainers.

The Board also includes non-voting representatives from the federal, provincial and municipal governments. Business and labour have equal representation and co-chair the Board.

Each Board member is elected from their respective labour market partner group, to which they are accountable. The labour market partners provide a link to various sectors of the community and help the Board fulfil its mandate.

A consensus decision-making model is used by the Board to ensure that all interests are equally respected.

Mandate

- Recognize employment trends in the City of Toronto and find out where the skill shortages are as well as what the training requirements will be.
- Prepare an action plan to implement strategies for meeting training needs in the City of Toronto.
- Advocate for a training environment that meets the needs of businesses, the employed and the unemployed.
- Promote the establishment of training standards, access and equity in training, and lifelong learning.

Vision

The Toronto Training Board is a catalyst for training solutions grounded in research and guided by multi-stakeholder perspectives.

Our Sponsors

The Toronto Training Board is sponsored by the Ontario Ministry of Training, Colleges and Universities (MTCU) and Human Resources Development Canada (HRDC). Although the Board is funded by government, it operates at arm's length.

The Need for Local Boards

Ontario's economy has undergone many changes in response to global demands, demographic shifts and technological innovation. To meet this challenge, Ontario must create a skilled and flexible labour force.

Over the past few years, there has been a growing consensus that labour force development needs participation and leadership from all the labour market partner groups—business, labour, educators/trainers, and equity and special target groups (women, visible/racial minorities, persons with disabilities and Francophones).

It is at the local level that the needs of individuals and employers are identified and the required programs and services delivered. The role of local training boards, therefore, is to act as coordinating bodies for identifying and achieving improvements in labour force planning at the local level.

Building Partnerships

One of the unique features of training boards is their ability to form partnerships with the community to address the training and adjustment needs of the region. The information regarding training and adjustment that is needed for workers to meet job skill requirements must come from employers, employees, the unemployed, educators/trainers and those facing barriers to training and employment, as well as a host of others. Local training boards and their community partners work together towards creating a highly skilled, competitive workforce.

Board Members

Board Directors as of June 2002

Tony Azevedo	Business
Gail Benick	Educators/Trainers
Kay Blair	Visible/Racial Minorities
Eileen Burrows	Labour
Liz Fong	Labour
Pat Hatt	Persons with Disabilities
Mazher Jaffery	Business

Lynda Jagros-May	Business Co-Chair
Peter Landry	Business
Mike McCue	Labour Co-Chair
Judy Mitchell	Labour
Laura Palmer-Korn	Educators/Trainers
Adela Roki	Labour
Renaud Saint-Cyr	Francophones
Cristina Selva	Labour
Rebecca Sugarman	Women

Government Representatives as of June 2002

Lesley Buresh	Federal Government
Teenie Gibson	Provincial Government
Ted Lis	Municipal Government
Wendy Molotkow	Municipal Government Alternate

Staff as of June 2002

Nowshad Ali	Executive Director
Tanya Mruck	Administrative and Communications Officer
Donna Vogel	Labour Market Specialist

Appendix B—The E-Scan Consultation and Validation Process

In late May and early June 2002, the Training Board consulted with 35 key informants, including members of the Board's seven labour market partners —business, labour, educators and trainers, women, visible minorities, persons with disabilities and Francophones.

This appendix contains the following information related to the consultation and validation process for this e-scan: the invitation to attend the e-scan consultation meetings; the registration form for the consultation meeting; a list of participants at the e-scan consultations; the feedback form for the consultation meetings; a summary of completed evaluation forms for the consultation meetings; and the invitation for feedback on the e-scan draft.

Informants were provided with a briefing and discussion document that summarized the key themes and issues identified in the *2001-2002 Environmental Scan Update*, as well as current labour market information. This *Highlights Report* served as the starting point for discussion centred around five key questions:

1. What are the barriers or gaps in training that must be addressed in Toronto?
These could include gaps in:
 - available training services
 - trained workers
 - training for people who are excluded from the current labour market
 - gaps in training for lifelong learning
2. What are the common themes and shared concerns that you see emerging from these barriers and gaps?
3. Which of these concerns would be your top priorities for action?
4. Can you provide examples of innovative approaches or opportunities to address these gaps in training in Toronto?
5. Are there other organizations that need to be working together to move forward on skills development?

Invitation Letter

Dear _____:

The constituents you represent and serve are, no doubt, deeply affected by many labour force and adjustment issues. Whether it is the growing diversity of the labour force, impact of the impending double cohort, need for literacy and numeracy skills or impact of industry job losses and gains, the effects are often critical, and have a direct impact on both productivity and quality of life.

We are in the process of organizing consultation sessions aimed at updating our most recent Environmental Scan (E-Scan) of labour force, training and adjustment issues in the GTA. This is an opportunity for you to play a pivotal role in tracking changes in the environment, identifying new and/or emerging issues and providing invaluable insight into the progress, or lack thereof, on key issues identified.

The consultation will engage you in the following way:

1. The Toronto Training Board will distribute a short paper that summarizes the key themes and issues identified in last year's E-Scan Update, as well as current labour market information.
2. This paper will form the basis of a presentation and discussion at the consultation session. As we strive for cross-pollination of ideas we will attempt to include a diverse audience at each session. Your involvement is crucial to this aim.
3. You are invited to participate in a consultation session hosted by the Toronto Training Board, the details of which can be found on the attached registration form.

These consultations will also serve as a foundation for identifying emerging issues, which we will want to examine more closely when we conduct a full E-Scan in 2003.

The results of the consultations will directly inform the development of our 2002-2003 E-Scan Update report, the production of sectoral position papers and issue-focused articles, and the identification of initiatives which are central to addressing current issues, barriers, and opportunities in labour market training and adjustment. All of these outcomes will be made available to you and are sure to aid your planning, service provision and advocacy endeavours.

We look forward to your participation. Please use the attached registration form to confirm your participation and call me directly (416-934-1050) with any questions you may have. Once I receive your registration form, I will forward the Briefing/Summary Paper.

Sincerely,

Consultation Registration Form

Please fax the completed form to the Toronto Training Board @ 416 -934-1654 **no later than Friday, May 17, 2002.**

Consultations will be held at Metro Hall, 55 John Street, Toronto. Please choose [] ONE of the following consultation dates:

- Monday, May 27 2:00- 4:30 p.m. Meeting Room 303
- OR
- Thursday, May 30 2:00- 4:30 p.m. Meeting Room 313
- OR
- Friday, May 31 9:00- 11:30 p.m. Meeting Room 314

Metro Hall is wheelchair accessible and ASL -interpretation, computer note -taking and a bilingual interpreter for Francophone participants are available upon request. To arrange for any of these services or other accommodation, please do not hesitate to contact us at 416-934-1050 (voice) or vogel@ttb.on.ca (email).

Please confirm your contact information:

Name:	
Organization:	
Title:	
Address:	
Phone:	
Fax:	
Email:	

We will confirm your registration and send you a copy of the Briefing/Summary Paper in advance of the consultation. Thank you and we look forward to seeing you.

Consultation Participants

Invitations were sent to 39 individuals. A consultation session was also held at the Annual Meeting of the Ontario Association of Career Colleges. Additional individuals were targeted for one -on-one interviews, based on gaps in the sectors or labour market partners who had attended the group consultations, as well as suggestions made by key informants. The following individuals participated in consultation meetings held on May 22, May 27, May 28 and May 30, and in one -on-one interviews. Taken as a whole,

the 35 key informants who participated in the consultation process comprise a cross section of the Toronto Training Board's seven labour market partners (business, labour, educators/trainers, women, visible minorities, persons with disabilities and Francophones).

Joan Atlin	Association of International Physicians and Surgeons of Ontario
Richard Beaudry	Community Information Toronto
Diana Capponi	Ontario Council of Alternative Businesses
Sandy Demark	CDI College
Dini Densmore	Ontario Council of Alternative Businesses
Pam Derks	Association of Colleges of Applied Arts and Technology of Ontario
Kathy Dickson	Employment Action
Josie Di Zio	COSTI Immigrant Services
Guy Ewing	Metro Toronto Movement for Literacy
Karen Goldenberg	JVS of Greater Toronto
Paul Goyan	CDI College
Janine Granoł-Wilewski	Grand Health Academy
Randy Heasman	St. Stephen's Community House
George Hood	Herzing College
Mitch Holt	Local 183 Lifelong Learning Centre
Jen Liptrot	ACTEW
Belinda Ma	QGI Institute
Scott Macivor	Ontario Construction Secretariat
Linda McGrath	OAYEC
Wendy Nailer	Centre for Addiction and Mental Health
Tim Owen	World Education Service
Eva Pakyam	YWCA
Laura Palmer-Korn	YMCA
Don Phaneuf	Employment Action
Al Ruggero	Construction Recruitment of External Workers Services — Greater Toronto Homebuilders Association
Samantha Sherkin	Canadian Centre for Women's Education and Development
Norm Shulman	Office for Partnerships and Advanced Skills
John Spink	Office for Partnerships and Advanced Skills
Renaud Saint-Cyr	Alpha Toronto
Susan Stone	Community Information Toronto—Possibilities Project
Stephanie Tang	Centre for Information and Community Services
Alicia Tessier	Human Resource Professionals Association of Ontario
Karen Thornton	ALDER Centre
Elizabeth Yohannan	Community Social Planning Council of Toronto and Scarborough Employment Services Project
Bibi Zaman	Canadian Centre for Women's Education and Development

Summary of Consultation Evaluations

Twenty-one out of 24 evaluation forms were completed. The results are summarized below:

1. What did you like the most about this session?
 - good representation from different groups —diversity of participants and perspectives
 - consultation was brief, focused, well-organized and well facilitated
 - opportunity to discuss issues in an open and participatory process
 - the background material provided was useful
 - good presentation of the highlights of last year's e-scan
 - sharing knowledge and concerns with the TTB and one another
 - good proposals and recommendations that could lead to positive change

2. What did you like the least about this session?
 - too many issues, not enough depth
 - need more time to develop a better understanding of the issues and the role we all play
 - need a more formal process to make sure that all points of view get on the table
 - need to highlight areas of disagreement as well as consensus
 - would like an opportunity for further discussions
 - difficult to know how the input will be used, what the outcome will be
 - frustrated with lack of strategies for change, difficult to reach consensus on where to go, what the next steps should be
 - more research and policy information would add to the discussion
 - lack of representation from employers

3. Reflecting on the session content and the information shared among participants, what are some of your key observations?
 - very knowledgeable group, people know their own sector/interest very well
 - we have many shared concerns, common gaps are relevant across constituencies
 - examined the perspectives of different sectors
 - would have been good to have employer participation
 - willingness to work together is positive
 - there is a strong desire for change
 - there is potential for collaboration among participant organizations
 - need for partnerships between trainers, employers and unions
 - service providers not very well known for what they do

- need common definitions and a clear vision of our role
- need to better differentiate training and what it means
- need to understand different sectoral issues
- need the leadership of the Training Board
- the need for on-the-job training has increased
- need to bridge the information and communication gaps between trainers and employers/business sector. Most of the focus is currently on the unemployed and the underemployed.
- there is a need for employer education, especially around newcomers and youth
- need to address access to professions and trades for newcomers, racialized communities, immigrant youth and women must be stressed
- need for a newcomer employment strategy with a number of initiatives, including employer incentives
- need training for women, particularly in non-traditional professions and non-traditional skills
- need to support apprenticeship in trades
- need to look at different strategies for different groups
- there are reasonable solutions for each affected group but no one program will work for all
- lack of a training culture, including buy in as lifelong learners and employers
- high school options need to expand
- need skills enhancement/lifelong learning for those in the labour force
- need for coordination, an integrated system for training in Toronto. Need a one-window approach to access to training.
- need increased flexibility
- need further research
- need to identify key trends, especially skill shortages in the near future
- service providers need updated labour market information—e.g. on job demands, required qualifications
- interested in monitoring how gaps are being resolved, what progress is being made
- identifying best practice models was interesting. Need to further explore best practices. Need to look at what has worked in the past and implement solutions based on current economic models.
- governments are not funding at a level that will make it all work
- need for more assistance from all levels of government in terms of other supports to facilitate participants to take training

4. Please rate the following on a scale of 1 - 5:
 (1=poor, 2=fair, 3=good, 4=very good, 5=excellent)

Total number of responses = 21

Response Average

Quality and effectiveness of the *Highlights Report*

4.1

Quality and effectiveness of the facilitation	4.3
Quality and effectiveness of the physical environment (e.g. room, seating, lighting, access, etc.)	4.1

5. Other comments.

- a very productive session
- it is important to keep such consultations going
- Training Board reports are valuable

6. Are you interested in being involved in future consultations?

- 19 out of 21 participants indicated that they would be interested in being involved in future sessions

Invitation for Feedback on E-Scan Draft

A draft copy of this report along with a feedback form was sent to the Board's Directors as well as the 35 individuals who participated in the E-Scan consultations. Feedback was received from 12 of the 35 and was incorporated into the final report.

Toronto Training Board Environmental Scan Update 2002-2003 Feedback Form

Please provide your comments on the Draft Environmental Scan Update 2002 –2003 (June 2002) in the space provided. You can make additional copies of this form as needed. Please fax the completed form back to 416 -934-1654 or e-mail your comments to vogel@ttb.on.ca no later than Wednesday, June 26 2002. Thank you.

Please indicate page and paragraph numbers if you are referring to specific passages in the document.

1. What did you find most helpful in the e-scan?

2. What did you find unclear, or requiring further evidence? Can you direct us to sources that would assist us?

3. What would you like to see addressed in further rewrites, or in future e-scans?

4. Do you have any information or experiences that you would like to share that would assist us in developing this document?

Name _____

Organization _____

Date _____

Appendix C—Map of the Toronto Area

Figure 1—Map of the Toronto Area, Showing the City, GTA and CMA⁴⁸



The Greater Toronto Area (GTA) comprises the City of Toronto plus the 24 surrounding municipalities in the regions of Durham, York, Peel and Halton. Statistics Canada classifies city regions (Census Metropolitan Areas —CMA's) according to labour market and commuting criteria. The Toronto CMA comprises Toronto, Ajax, Pickering, Uxbridge, Georgina, Georgina Island Indian Reserve No. 33, East Gwillimbury, Bradford West Gwillimbury, New Tecumseth, Whitchurch-Stouffville, Newmarket, Aurora, Township of King, Vaughan, Richmond Hill, Markham, Mississauga, Brampton, Caledon, Orangeville, Township of Mono, Halton Hills, Milton and Oakville.

⁴⁸ Toronto Board of Trade (2000). *Toronto Business and Market Guide: A Profile of the Toronto and the Greater Toronto Area*. Toronto: Toronto Board of Trade.

Appendix D—Definitions

The following definitions are provided by HRDC.

Labour Force

The labour force is composed of those members of the civilian non-institutional population 15 years of age and over who, during the reference week, were employed or unemployed.

Employed

Employed persons are those who, during the reference week:

(a) did any work (see note below) at all

(b) had a job but were not at work due to:

- own illness or disability
- personal or family responsibilities
- bad weather
- labour dispute
- vacation
- other reason not specified above (excluding persons on layoff and persons whose job attachment was to a job to start at a definite date in the future).

Note: Work includes any work for pay or profit, that is paid work in the context of an employer-employee relationship, or self-employment. It also includes unpaid family work, which is defined as unpaid work that contributed directly to the operation of a farm, business or professional practice owned by a related member of the household.

Unemployed

Unemployed persons are those who, during the reference week:

(a) were without work, had actively looked for work in the past four weeks (ending with reference week), and were available for work (see note below);

(b) had not actively looked for work in the past four weeks but had been on layoff (see note below) and were available for work;

(c) had not actively looked for work in the past four weeks but had a new job to start in four weeks or less from the time of the reference week, and were available for work.

Notes:

1. Unemployed people who meet the following criteria are regarded as available:
 - i. were full-time students seeking part-time work who also met condition (ii) below. (Full-time students looking for full-time work are classified as not available for work in the reference week.)
 - ii. reported that there was no reason why they could not take a job in reference week, or if they could not take a job it was because of “own illness or disability,” “personal or family responsibilities,” or already had a job.”
2. People are classified as being on temporary layoff when they expect to return to the job from which they were laid off.

Unemployment Rate

The unemployment rate represents the number of unemployed persons, expressed as a percentage of the labour force. The unemployment rate for a particular group (e.g. defined by age, sex, marital status) is the percentage of unemployed people in that group.

Participation Rate

The participation rate is the percentage of the population 15 years of age and over that is in the labour force. The participation rate for a particular group (e.g. defined by age, sex, marital status) is the percentage of that group that is in the labour force.

Appendix E—Environmental Scan Summary Report

The information below is provided so that issues raised in the *Toronto Training Board 2000–2001 Environmental Scan: Training for Toronto’s ‘New’ Economy*, of September 2000, can be compared with those raised in this e -scan. It is important to note that there are issues in this e -scan that relate to more than one issue in last year’s e -scan. Also, because some issues in this report were not addressed in last year’s, and vice versa, some fields have been left blank.

Table 3—Environmental Scan Summary Report

ONGOING KEY ISSUES/CONCLUSIONS IDENTIFIED IN PREVIOUS E-SCAN SUMMARY REPORT (<i>TRAINING FOR CHANGE</i>)	CURRENT STATUS OF KEY ISSUES/CONCLUSIONS IDENTIFIED IN PREVIOUS E-SCAN	NEW/EMERGING ISSUES IDENTIFIED IN 2002-2003 E-SCAN SUMMARY REPORT	DATA SOURCES THAT SUPPORT THE NEW/EMERGING ISSUES RAISED THE 2002-2003 E-SCAN SUMMARY REPORT
Labour Force Supply Issues			
<ul style="list-style-type: none"> The City of Toronto population is growing steadily; the areas surrounding Toronto are growing very quickly, both of which stress the infrastructure of the City 	<ul style="list-style-type: none"> Population growth continues. Toronto CMA grew by 9.8% from 1996 to 2001, to 4,683,000. 		
<ul style="list-style-type: none"> For the first time, Toronto’s population in 2001 is estimated to be comprised of over 50% of visible/racial “majorities.” 	<ul style="list-style-type: none"> Immigration was a major factor behind population growth. More than 445,000 immigrants settled in the Toronto CMA between 1996 and 2001. 		
<ul style="list-style-type: none"> Toronto’s economy has slowed down over the past year, with rising unemployment; layoffs have been experienced in the dot-com / media / new media and the automotive sectors. 	<ul style="list-style-type: none"> The job market grew at a slower rate than the previous year—total employment growth of 1.8% in 2001-2002. The unemployment rate increased from 6.1% in April 2001 to 7.1% in April 2002. 		
<ul style="list-style-type: none"> The graduation of the “double cohort” in 2003 will mean a dramatic increase in youth seeking to enter the workforce. 	<ul style="list-style-type: none"> The youth unemployment rate has risen by 30%, from 11% in May 2001 to 14.3% in May 2002. 		

Labour Force Demand Issues			
<ul style="list-style-type: none"> • Skilled construction workers are in short supply. 	<ul style="list-style-type: none"> • The construction industry continues to face shortages in several trades. 		
<ul style="list-style-type: none"> • Physicians and surgeons are in short supply. 	<ul style="list-style-type: none"> • Shortages have persisted if not worsened. 		
<ul style="list-style-type: none"> • Nurses are in short supply; employers face recruitment difficulties. 	<ul style="list-style-type: none"> • Some improvements in the number of nurses per capita in Ontario, but more needs to be done. 		
		<ul style="list-style-type: none"> • Shortage of pharmacists. 	<ul style="list-style-type: none"> • HRDC (Jan-Mar 2002), <i>Labour Market Bulletin: Toronto Labour Market News</i>.
		<ul style="list-style-type: none"> • Teacher shortage in the near future. 	<ul style="list-style-type: none"> • HRDC (Jan-Mar 2002), <i>Labour Market Bulletin: Toronto Labour Market News</i>.
		<ul style="list-style-type: none"> • Demand for Information Technology workers will soon outpace supply 	<ul style="list-style-type: none"> • TD Economics (May 22 2002), <i>The Greater Toronto Area (GTA): Canada's Primary Economic Locomotive In Need of Repairs</i>. • Information Technology Association of Canada (May 6 2002), "IT Skilled Labour Shortage Returning in 2002."
		<ul style="list-style-type: none"> • Women are underrepresented in the IT workforce. More needs to be done to attract women to the field. 	<ul style="list-style-type: none"> • Information Technology Association of Canada (May 14 2002), "ITAC Study Reveals IT Worker Gender Gap."

		<ul style="list-style-type: none"> The Clothing and Textile sector could be made more internationally competitive if the skills of its workforce were improved. Over half of the workers in the industry have not graduated from high school. 	<ul style="list-style-type: none"> TD Economics (May 22 2002), <i>The Greater Toronto Area (GTA): Canada's Primary Economic Locomotive In Need of Repairs.</i>
Adjustment and Service Issues			
<ul style="list-style-type: none"> Computer literacy, formal education, academic and problem-solving skills, literacy and numeracy skills and interpersonal skills are required in Toronto's job market. 	<ul style="list-style-type: none"> The same five general skill sets remain the basic requirements of Toronto employers. 		
<ul style="list-style-type: none"> Immigrant women garment workers who are not highly educated and/or who have poor English language skills face barriers to more economically rewarding forms of labour force participation. 		<ul style="list-style-type: none"> High prevalence of underemployment in low-skilled positions among immigrant women. These women face multiple barriers to achieving meaningful and sustainable employment: Canadian work experience; fluency in spoken English and popular computer software; access to childcare; inadequate income. 	<ul style="list-style-type: none"> Working Skills Centre of Ontario (May 2002). <i>From the "Canadian Work Experience" Dilemma to Canadian Labour Market Participation: Programs and Strategies for Marginalized Immigrant Women.</i>
<ul style="list-style-type: none"> Potential employers cite lack of "Canadian work experience" as a reason for not offering work to immigrant women. 	<ul style="list-style-type: none"> Lack of Canadian work experience remains a problem. 		
<ul style="list-style-type: none"> International Medical Graduates (IMGs) offer a potential pool of physicians to fill shortages were the opportunities for licensing available 	<ul style="list-style-type: none"> The physician shortage persists. Large numbers of IMGs unable to practice in Ontario. 		

<ul style="list-style-type: none"> The skills shortages will require tripartite government and multi-stakeholder cooperation 		<ul style="list-style-type: none"> More integration and information-sharing among the agencies that fund training and adjustment programs, community-based and private sector service providers, regulatory and licensing bodies, unions and employers is required. 	<ul style="list-style-type: none"> Consultations with key informants.
<ul style="list-style-type: none"> Need for expanded apprenticeship programs identified by business and in terms of improving youth labour market entry. 	<ul style="list-style-type: none"> Shortages persist. 	<ul style="list-style-type: none"> Need to facilitate accreditation of foreign-trained tradespeople. Need expanded apprenticeship programs and outreach to attract young people to the skilled trades. High school curricula must include high-quality shop programs and apprenticeships as options for students. Employers must be encouraged to invest more in training. 	<ul style="list-style-type: none"> Consultations with key informants.
<ul style="list-style-type: none"> There is decreased access to adult high school programming. 		<ul style="list-style-type: none"> Adult education, literacy and basic skills training inadequate to meet the needs of the population. 	<ul style="list-style-type: none"> Consultations with key informants.
<ul style="list-style-type: none"> There is little adult high school equivalency programming in French. 	<ul style="list-style-type: none"> No service exists in this area. 	<ul style="list-style-type: none"> Francophones in the GTA, many of whom are new immigrants and refugees, have no access to adult education programs beyond basic literacy. 	<ul style="list-style-type: none"> Consultations with key informants.
		<ul style="list-style-type: none"> There are long waiting lists for ESL classes. This education must include conversational skills and occupation-specific terminology. 	<ul style="list-style-type: none"> Consultations with key informants.

<ul style="list-style-type: none"> • There is need for more access to training for workers who are employed. 		<ul style="list-style-type: none"> • Lack of awareness and involvement by employers a significant barrier to training. • Lack of a “training culture” that would increase employers’ awareness of training needs and issues, and provide concrete and easily accessible incentives for employer investment in training. 	<ul style="list-style-type: none"> • Consultations with key informants.
		<ul style="list-style-type: none"> • Significant gaps and disincentives in training and employment services for persons with disabilities. • Persons with physical, mental health and learning disabilities require accommodation in education and training programs and in the workplace. 	<ul style="list-style-type: none"> • Consultations with key informants.
		<ul style="list-style-type: none"> • Unrealistic “outcome-based” funding models encourage “creaming” for those participants who are most likely to succeed in education and training programs. 	<ul style="list-style-type: none"> • Consultations with key informants.
		<ul style="list-style-type: none"> • In order to participate and succeed in education and training, people require access to a range of supports. • Essential resources include income, childcare and transportation. 	<ul style="list-style-type: none"> • Consultations with key informants.
		<ul style="list-style-type: none"> • Part-time programs for people who are employed and/or caring for children or other family members, and for persons with disabilities would make the training and adjustment system more accessible. 	<ul style="list-style-type: none"> • Consultations with key informants.

		<ul style="list-style-type: none">• People who have been out of the labour force for a long time or are new to the country need psycho-social support as well as vocational training.	<ul style="list-style-type: none">• Consultations with key informants.
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