



Environmental Scan

Ontario

Spring 2018



Once a year, the Service Canada Ontario Region Labour Market and Socio-economic Information Directorate develops an Economic/Environmental Scan (E-Scan), a report that provides a general overview of the demographic, economic and labour market conditions and trends for the province of Ontario. E-Scans are intended to support regional Service Canada operations by identifying potential pressures on service and program delivery. However, they may also be of interest to those who seek to know more about the state of a provincial or regional economy and labour market. Facts and statistics presented in this document reflect information available as of February 2018.

KEY POINTS

General overview/economic context

- The global rate of economic growth surprised many in 2017, with higher than expected growth in the United States and Canada especially.
- There are still persisting uncertainties in the United States (U.S.) and United Kingdom (U.K.) economies regarding sustained protectionist rhetoric and nationalism, in addition to ongoing policy and trade insecurity.
- The U.S. — Ontario's largest external trading partner — finished 2017 with a robust 2.9% growth rate, though the first quarter of 2018 saw growth of only 1.9% amid recent uncertainty. However, record consumer confidence, corporate and personal tax cuts, and low unemployment support a projected 2.5% growth in 2018.
- The Canadian economy grew by an estimated 3.0% in 2017, leading the G7 economies. Several provinces rebounded in 2017 and overall growth was aided by strong consumer spending and a strong real estate market. Growth for 2018 is expected to slow to 2.3%, and 2.0% in 2019.
- A key risk for Canada is the future of the North American Free Trade Agreement (NAFTA) and how it will navigate the persisting global protectionist rhetoric. The Canadian dollar (CAD) strengthened over 2017, and is expected to modestly strengthen throughout 2018; however, this could make Canadian exports less competitive depending on its performance compared to the U.S. dollar (USD).
- Ontario's economy rose at a faster rate than expected, growing 2.7% in 2017, up from 2016. Growth is expected to moderate to 2.0% in 2018.

Provincial and local labour market conditions

- Employment rose by 128,400 (+1.8%) in Ontario in 2017, marking the province's eight consecutive yearly increase since 2009
- The provincial unemployment rate fell by 0.5 percentage points to 6.0%, decreasing for the fifth consecutive year
- For 2018, employment is projected to increase by about 1.3% in Ontario, while the provincial unemployment rate is expected to decrease to 5.8% from 6.5% in 2017
- Employment grew in both the services-producing sector (+114,000) and the goods-producing sector (+14,500), with particularly strong growth in professional, scientific and technical services, health care and social assistance, manufacturing and construction
- Employment decreased in 3 out of 11 economic regions, namely, Kingston-Pembroke (-2.1%), London (-0.2%), and Northeast Ontario (-0.9%)

INTRODUCTION

The purpose of the Environmental Scan is to outline the major trends and issues facing Canada and the **Ontario Region** that will influence the economic and social environment in current and future years. The document provides timely, evidence-based information which supports the business planning process and it is divided into three main parts. Section 1 includes a general overview of the Canadian and Ontario economic context with employment outlook information. Section 2 provides perspective on the provincial and local labour markets. Section 3 includes information for internal use on the implications for program and service delivery.

SECTION 1: GENERAL OVERVIEW / ECONOMIC CONTEXT

Overall, the global pickup in activity beginning in the second half of 2016 continued throughout 2017, and is projected to continue in 2018. The International Monetary Fund (IMF) raised its estimate for global economic growth in 2017 and 2018, citing both stronger expansion in the first half of 2017 in the Eurozone, Japan, some emerging markets (particularly China and Russia), and a strong run up in global equity markets in the second half of 2017. After a global GDP growth projection of 3.2% in 2016, the IMF increased its growth forecast to 3.6% in 2017 and 3.7% in 2018, 0.1% higher than projections in April 2017. While advanced economies (including the Eurozone, Japan, and Canada) experienced strong growth in 2017, the IMF has revised projections downwards for the U.S. and U.K. due primarily to "significant policy uncertainty" in the two countries. A strong U.S. economy, assuming a positive result from the renegotiation of the NAFTA, will benefit Canadian exports – especially Ontario's manufacturing industry. However, recent developments with the softwood lumber trade dispute, implementation of duties (newsprint, steel) and possible additional changes to trade policies by the U.S. have the potential to significantly shift the Canada-U.S. trade relationship. Furthermore, as financial and monetary policy shifts gradually from a recovery mode stemming from the Great Recession to a more cautious mode amid the global phenomenon of high growth rates, the Bank of Canada is projected to gradually increase interest rates in lock with the United States, which will have wide ranging impacts on investment levels.

Asia-Pacific region: Wait and Xi

Larger economies in the Asia-Pacific region generally fared well in 2017, while smaller economies' growth was mixed. The regional focus remained on China's structural shift from an export-driven to a consumer-driven economy, and the slow-down that accompanies this shift. Japan's economy grew faster than expected in 2017 and other south-east Asian economies generally fared well. Indian economic growth saw a slowdown in 2017 due to lingering effects from its demonetization policy - India's growth is supposed to rebound strongly and accelerate through 2018.

In a broader regional lens, 2017 saw some important events in the Asia-Pacific region that will have an impact going forward. Within China, the largest news was the reelection and continuing consolidation of power by its President, Xi Jinping, which is in line with both the monetary and political changes taking place in the world's most populated nation. Canada has been involved in extensive and ongoing negotiations around a possible free-trade agreement with China, which would have far reaching trade implications for both countries. Second only to the U.S., China represents over 12% of Ontario's imports (many of which are intermediate goods) and can have a strong impact on a range of industries (particularly manufacturing) that are important to various regions within Ontario.

In January 2017, the United States withdrew from the Trans Pacific Partnership (TPP) as per the wishes of the newly elected President Trump. Although having the world's largest economy absent significantly diminished the impact of such a trade agreement, Canada and the ten other countries reached a new (and quite similar) agreement: the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). This trade agreement is the third largest trade agreement after the NAFTA and the European Union, and has significant implications for Canada's trade markets. The CPTPP also follows the success achieved by the first trade agreement Canada reached with an Asian nation in 2014, the Canada-Korea Free Trade Agreement (CKFTA), and supports Canada's ongoing negotiations with other countries.

Europe: Macro(n) economics

In the Eurozone, economic conditions have shown improvement, but concerns remain regarding the continuing geopolitical tensions, ongoing Brexit negotiations, and protectionism in European and Asian economies. The uncertain political climate within three of the EU's biggest economies (United Kingdom, France and Germany) arose in 2017, where immigration and the role of the EU were central factors in each country's election. As some of the largest partners in the EU, the potential impact for Canadian trade interests remains a concern; however, all of the political change occurred in legal and democratic forums, and the Eurozone is still one of the strongest and innovative economic regions in the world. After five years of moderate recovery, 2017 has seen European growth accelerate at its fastest pace in 10 years. The European commission has raised its 2017 growth forecasts for the Eurozone to 2.2%, up from 1.7% that was previously forecast at the beginning of 2017. Beyond 2017, the EC predicts the Eurozone and EU will see growth of 2.1% in 2018 and 1.9% in 2019.

After a slowdown in 2017, primarily due to rampant uncertainty surrounding Brexit, the outlook for the U.K. economy in 2018 is not overly optimistic, with expected growth rates for 2018 and 2019 of 1.3% and 1.1% respectively. The U.K. is the second largest export destination for Ontario-produced goods at about 6% of exports. Furthermore, 9.5% of Ontario's Finance & Insurance sector GDP is linked to the U.K. Ontario exports to the U.K. also include precious metals, minerals, and aerospace parts. However, Ontario's trading relationship with the U.K. is somewhat distorted as gold accounts for 80% of all exports to the U.K. — \$11.2B of gold was exported to the U.K. in 2016.

The provisional application of a trade agreement between Canada and the E.U. – the Comprehensive Agreement on Trade Agreement (CETA) – commenced on September 21, 2017, signaling that all economically significant parts of the agreement were in effect. The “C” in CETA stands for comprehensive because this trade agreement sets standards not just in relation to tariffs on goods but also sets standards on services, non-tariff barriers, investment, government procurement, as well as areas like labour and environment. CETA also includes sections regarding the harmonization of pharmaceutical intellectual property law and agreements on professional recognition. By creating a common regulatory environment, lowering tariffs and having highly educated labour forces, there is potential for increased cooperation and trade between Ontario’s pharmaceutical industry and the EU.

United States: A trading relationship that Trumps them all

The U.S., Ontario’s largest trading partner (82% of exports, 56% of imports), finished off a strong year with a GDP growth rate of 2.9% in the last quarter of 2017, beating official estimates of 2.5%. However, this quickly fell in the first quarter of 2018, with growth of only 1.9%. More than almost any other nation, the uncertainty around domestic and foreign policy, as well as trade relationships, will likely cause significant and at times unexpected swings in economic accounts – largely owing to occasionally confusing and uncertain government rhetoric. Fiscal policy is projected to help stabilize 2018 growth, as evidenced by the tax reforms recently implemented to stimulate investment and consumption. While unemployment is projected to drop to an extreme low of 3.9% in 2018 and 2019 (down from rates of 4.7% and 4.1% in 2016 and 2017), much of this job growth is in low paying retail and food service industries that mainly hire part time workers.

Manufacturing in the U.S. is expected to grow faster than the general economy. Production growth is projected at 2.8% in 2018, and 2.6% in 2019. However, these forecasts have not taken into account President Trump’s promise to restore manufacturing jobs, so the actual growth rates, like other projections for the U.S., have an added air of uncertainty. The fastest growing jobs will be in healthcare, social assistance, and construction; jobs requiring a master’s degree are projected to grow the fastest, while jobs requiring a high school diploma will grow the slowest.

After a long period of low interest rates to stimulate spending, the Federal Reserve has been gradually increasing rates from their low of 0.75% in December 2016 to 1.75% in March 2018. While it is projected to continue gradually raise interest rates as reforms from the financial crisis are loosened, there are concerns about further impacts on the U.S. real estate market. The Bank of Canada has historically maintained rates fairly close to the Federal Reserve’s, and thus it can be used as an approximate guide for the Bank of Canada’s path.

A strong U.S. economy is a good thing for Ontario. However, the largest concern for Ontario is the continuing uncertainty regarding the future of the NAFTA. Despite extensive negative rhetoric about its structure, progress is reportedly being made in negotiations as of April 2018. Hurdles regarding the automotive sector and minimum domestic production quotas will be particularly relevant to Ontario. A renegotiation and modernization of the trade agreement has the opportunity to seek further regulatory convergences and agreements on rules of origin. A modernized agreement would likely include provisions regarding intellectual property – directly affecting the pharmaceutical and medicine manufacturing subsector. However, the most immediate impact of the NAFTA renegotiation process, which will likely continue through 2018, is the negative effect it will have on cross-country investment with an uncertain investment environment.

Canada: True, north, strong and in debt

In 2017, Canada was the G-7's growth leader with strong gains in GDP early in the year, resulting in a growth rate of 3%. However, after a strong start in 2017, growth slowed towards year end, and is expected to continue, with growth rates forecast at 1.9% in 2018, and 1.6% in 2019. Canada's fast growing economy in 2017 can be attributed to high consumer spending and housing activity. However, changes to regulations in the housing market and increasing interest rates are expected to be the primary factors for the slowdown in growth. Government spending is expected to continue boosting growth in Canada as many provinces continue with large infrastructure spending budgets. Business investment continued to recover in 2017 and is forecast to continue rising in 2018 as exports to the U.S. increase due to more demand for Canadian goods (though subject to an uncertain trade environment) and an attractive CAD. Consumer spending increased in 2017, but became increasingly weighed down by high debt loads and slow wage growth.

The multi-year lows in oil and gas prices reached in early 2016 have benefited consumers and businesses (outside of the oil sector) through lower energy and transportation costs. After a low reached in 2016, the price of oil climbed steadily through 2017, finishing the year strong. With a strong rebound in 2016, natural gas saw its prices moderate in 2017, but still finish the year higher than lows of early 2016. The overall rebound in energy prices resulted in Alberta growing at a leading 6.7%, with the rest of the western provinces exhibiting similar strong growth. Pipeline politics continued to be a major story in 2017 and 2018, and will have serious consequences on investment and commodities markets.

The Bank of Canada has expressed concerns about the sensitivity of Canada's economy to increased interest rates due to the high levels of household debt and mortgage affordability. The Bank of Canada has remained cautious, and has followed in the Federal Reserve's footsteps, leaving the key interest rate at 1.25%. However, if the economy continues to grow at rates on par with economic forecasts, then the Bank will have no choice but to continue to increase rates in order to avoid pushing inflation above its targeted 2% level. The Bank is expected to keep the interest rate on hold for the next few months, but more rate hikes are likely to come in 2018 and the interest rate is expected to end the year at 1.75%

In 2017 it was reported that Canada had the highest percentage of average household debt as a share of per-capita GDP out of the OECD. Canada's household debt-to-GDP ratio is 101%, compared to other advanced economies generally well under 80%. The Bank of Canada has said this is one of their greatest concerns for Canada's economy moving forward; the higher levels of debt are being driven by household credit market debt, as well as continued high real estate prices in large urban centers (despite government policies attempting to slow rampant housing price growth).

Ontario: Growth and uncertainty that is yours to discover

Ontario's GDP accounts for just under 40% of Canada's total GDP, and therefore the success of Ontario's economy is important to Canada's success. Analysts' consensus estimate is that Ontario grew 2.6% in 2017 and is forecast to grow 2.1% in 2018 and 1.8% in 2019. The provincial economy has been supported by domestic demand as household spending and residential investments continue to grow. Exports, particularly manufacturing-related, have benefitted from the weak CAD and strong U.S. economy, and are expected to be key growth contributors in 2018. The auto sector gave an important boost to manufacturing in Ontario, as Canada - like the U.S. - hit new highs in production volume and sales in 2017.

The housing market ended in 2017 much differently than 2016. Although the real estate market is still strong, home resale activity has fallen sharply after the introduction of the fair housing plan earlier in 2017. Although

activity has begun to recover since then, rising interest rates, tighter mortgage lending rules with “stress tests”, and increasing household debt will subdue home resales compared to previous years as markets adjust.

Provincial investment in infrastructure and capital spending will continue to fuel growth in Ontario. An increase in capital spending across all levels of government is expected in 2018. Transportation and public transit will see the bulk of funding while the provincial government maintains a stimulus fiscal policy. The province also recently cut taxes for small businesses; however this is seen primarily as a defensive measure to help businesses deal with the sharp increases in minimum wage. The minimum wage increase to \$14 in January 2018, and to \$15 in January 2019 have reportedly caused some difficulties for small businesses, though official data is yet to prove anything conclusive. Proponents argue there will be no effect on the labour force, whereas opponents argue job losses could be as high as 90,000. It is unlikely that the full effects of this legislation will be realized in 2018, but will likely impact future decisions made by firms throughout the year regarding choices such as shifting towards capital versus labour – particularly since the minimum wage legislation will impact 22% of Ontario workers.

SECTION 2: REGIONAL, PROVINCIAL, AND LOCAL LABOUR MARKET CONDITIONS

Employment in Ontario expanded in 2017 for the eighth consecutive year. The provincial labour market observed an increase of 128,400 (+1.8%) in 2017, its largest gains in four years, as full-time employment (+106,100; +1.9%) and part-time employment (+22,300; +1.7%) both contributed strongly to the growth, according to Statistics Canada’s Labour Force Survey (LFS). Employee payroll figures from Statistics Canada’s Survey of Employment, Payrolls and Hours (SEPH) also confirm the growth of the Ontario labour market in 2017.

In conjunction with the growth in employment, the provincial unemployment rate has continued to fall, as it dropped to 6.0% in 2017, from 6.5% the previous year. This was the lowest unemployment rate in Ontario since 2000, as the province finally recovered to unemployment figures before the late-2000s recession. However, continuous decrease in Ontario’s participation rate was observed even as labour force and employment figures continued to grow in the province.

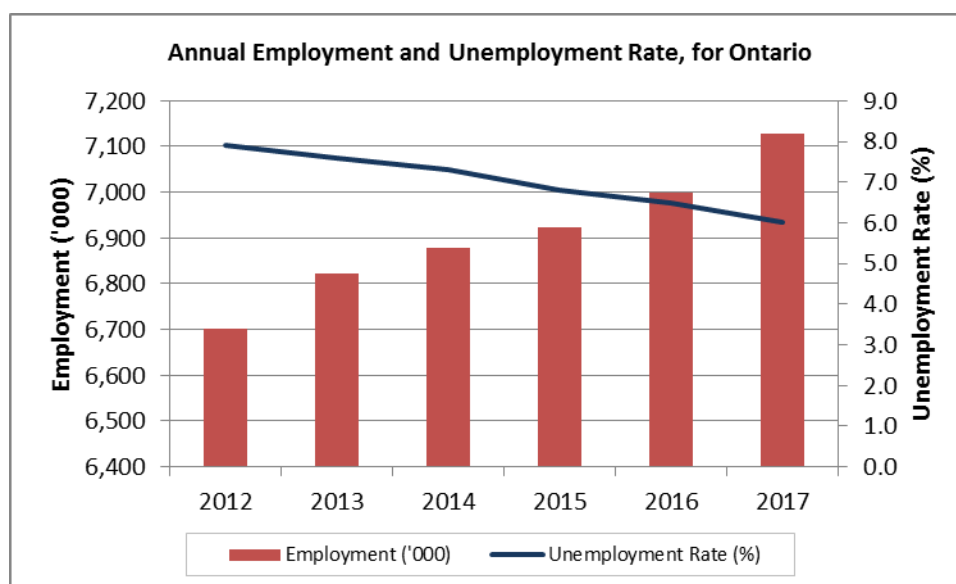
Looking forward to 2018, the provincial economy may experience some precariousness from a projected easing in consumer spending; the ongoing negotiations of trade agreements with the U.S; implementation of the Tax Cuts and Jobs Act (TCJA) strengthening U.S. competitiveness; slow growth in metal prices; a softer provincial housing market; and the initial impact of the minimum wage hike on provincial labour markets. While a low Canadian dollar and increasing export of services may bode well for Ontario, ongoing uncertainties in trade with the U.S. and muted investment and capital expenditure are expected to weigh heavily on exports. While residential construction in the province is expected to dip in 2018, investments in heavy engineering infrastructure projects will push forward the provincial construction industry. Forecasters expect employment in Ontario to increase by about 1.3% and the provincial unemployment rate to remain steady at about 5.8%.

Table 1: Annual Labour Force Statistics in Ontario

Seasonally unadjusted Data	Year			2016 to 2017		2015 to 2016	
	2017	2016	2015	Number	%	Number	%
Population 15 + ('000)	11,684.8	11,523.4	11,385.6	161.4	1.4	137.8	1.2
Labour Force ('000)	7,579.8	7,489.5	7,426.1	90.3	1.2	63.4	0.9
Employment ('000)	7,128.0	6,999.6	6,923.2	128.4	1.8	76.4	1.1
Full-Time ('000)	5,778.7	5,672.6	5,618.2	106.1	1.9	54.4	1.0
Part-Time ('000)	1,349.3	1,327.0	1,305.0	22.3	1.7	22	1.7
Unemployment ('000)	451.8	489.9	502.9	-38.1	-7.8	-13	-2.6
Unemployment Rate (%)	4,105.0	4,033.9	3,959.5	71.1	-	74.4	-
Participation Rate (%)	6.0	6.5	6.8	-0.5	-	-0.3	-
Employment Rate (%)	64.9	65	65.2	-0.1	-	-0.2	-

Note: Totals may not add due to rounding.

Source: Statistics Canada's Labour Force Survey -CANSIM Table 282-0002



Employment by Industry

The North American Industry Classification System (NAICS) is a hierarchical structure used to classify all of the industries in the Canadian economy. This system groups businesses and organizations by its principle line of work or the type of economic activity undertaken. All industries fall into the goods-producing sector or the services-producing sector based on similarities in the production process. Using this system, we can examine employment conditions across the various industries in the province.

Employment rose in both the goods-producing and services-producing sectors in Ontario between 2016 and 2017. The services-producing sector led the way with a gain of 114,000 over the year.¹ Employment has increased in the services-producing sector since 2010. The largest gains were in wholesale and retail trade

(+35,700), professional, scientific and technical services (+34,400), and health care and social assistance (+31,100). Meanwhile, employment grew by 14,500 in the goods-producing sector. Employment in the goods-producing sector reached its highest level since 2008 after sizeable gains over the past three years. The manufacturing industry saw the biggest increase within the sector (+17,900) followed by construction (+8,800).

Fewer but larger farms in the agricultural industry

Employment in the agricultural industry stood at 68,500 in Ontario in 2017.² The number of farms fell in the province but operations are larger and more valuable.³ Increased farm consolidation may stem from greater use of technology, heightened competition, and structural shifts. Farmers continue to receive higher prices for agricultural goods but the cost of inputs required to sustain and grow operations have risen as well.

The majority of farms in Ontario are oilseed and grain farms, cattle ranches and farms, and other crop farms. There has been an ongoing shift away from livestock and dairy farming to crop-based production. Though there are fewer animal-based farms, cattle ranching and farming has the highest number of employees followed by other crop farming, and greenhouse, nursery and floriculture production.⁴

Ontario is the centre for greenhouse production in the country with two-thirds of all greenhouse vegetable area in Canada.⁵ Greenhouses are a growing part of the agricultural base and its role may increase as some producers open medicinal marijuana facilities to meet demand from the legal recreational market. Consumer preferences towards locally sourced food, healthier options, specialty products, and convenience items will create opportunities for farmers.

Local farmers should benefit from a stronger export market, as the United States is the top export destination for Ontario's agricultural goods. Productivity gains and farm consolidation will likely temper employment growth in the years ahead. Despite this, challenges to attract and retain labour, especially during peak harvest seasons, will persist in the agricultural industry.

Forestry, fishing, mining, quarrying, oil and gas extraction sector continues to struggle

Between 2016 and 2017, employment in the forestry, fishing, mining, quarrying, oil and gas extraction sector fell 2.0% from 35,800 to 35,100 according to the Labour Force Survey.

Movements in employment in the mining, quarry operations, oil and gas extraction subsector generally respond to movements in metal prices. As both world metal prices and Ontario mining and quarrying capital expenditures have fallen since 2011, employment has stagnated. Large mining layoffs in Ontario included: Vale Canada closing Stobie Mine in Sudbury, affecting 230 employees;⁶ Goldcorp closing its Dome underground mine in Timmins, affecting 140 employees;⁷ and De Beers winding down the Victor Diamond Mine near Attawapiskat by early 2019, affecting 350 employees and about 150 contractors.⁸

Although mining exploration intentions have trended downwards since 2013, 2017 has seen some optimism as miners have shown more willingness to invest in exploration compared to 2016.⁹ Nevertheless, moving forward, growth in metal prices (and industry employment as a result) will likely be constrained in 2018 due to political instability, unstable market demand, and changing monetary policies.

In terms of forestry employment in Ontario, although logging and forestry will continue to be supported by domestic and U.S. housing construction and renovation going forward, the softwood lumber trade dispute with the U.S. could slow lumber exports to the United States.

The size of Ontario's oil and gas extraction subsector is small, and the effect of oil prices on provincial direct employment is minimal. The fishing and hunting subsector's employment impact on this broader sector is also negligible due to its size.

Investments in nuclear power and infrastructure will be key drivers of the utilities industry

Employment in the utilities industry decreased to 47,200 in Ontario in 2017.¹⁰ There has been a significant shift in the sources of electricity used in the province over the past decade. Nuclear and renewable power such as water, solar, and wind, generate the bulk of electricity while fossil-fuelled production plays a smaller role. Investments to refurbish reactors at the Darlington Nuclear Generating Station and the Bruce Nuclear Generating Station will keep nuclear energy at the forefront of the industry in the years to come.

Ontario's electricity system has sufficient capacity to meet domestic demand in the short term based on industry projections.¹¹ Electricity consumption has been rather flat in Ontario since 2009. Increased conservation, a shift to less energy-intensive industries, and greater use of distributed energy resources helped balance demand from population growth, denser urban centres, and an uptick in the economy. In addition to investments in energy generation, aging infrastructure and population growth in some areas will warrant upgrades to the power transmission and distribution network. This will create opportunities for workers in this field to meet the needs of a more complex grid that includes a wider range of power sources.

There are plans to expand the natural gas network across the province. The Government of Ontario announced in January 2017 that it would invest \$100M through its Natural Gas Grant Program to increase community access with new pipelines and infrastructure.¹² This will mainly target rural areas, First Nation communities, and projects that support business growth for large end users. Water and wastewater infrastructure will also get a boost with greater funding from the federal and provincial governments through the Clean Water and Wastewater Fund.¹³

Infrastructure investments will steer construction activity in Ontario

Employment in the construction industry increased to 512,500 in 2017, for the eighth consecutive annual gain.¹⁴ Investments in infrastructure such as power and transit will drive construction activity in the province. Commercial construction will likely remain steady as well and an uptick in industrial building may be on the horizon. While residential construction may see a dip in 2018, conditions will still be quite active in the larger urban centres and in the renovation market.

The total value of building permits issued increased over the last four years and hit \$39.1B in Ontario in 2017.¹⁵ Gains took place in both residential and non-residential construction. Capital expenditures on non-residential construction (not including repairs) rose to almost \$39B in the province in 2017.¹⁶ Some of the larger projects include: nuclear refurbishment activities; light rail transit projects in Toronto, Ottawa, and Hamilton; manufacturing investments in Sarnia, Sudbury, and Kingston; highway and bridgework in Windsor, Kitchener, and northern Ontario; and multi-year upgrades to schools and hospitals throughout the province. Commercial vacancy rates also hit a low in Toronto as the technology hub expands. Rising interest rates, policy measures such as the Ontario Fair Housing Plan, and stricter mortgage rules will soften the robust pace seen in the residential market over the past few years. The value of building permits for multi-family dwellings grew faster than for single-family structures in 2017. This trend may continue with ongoing demand for high-rise developments like condominiums, rental properties, and senior residences. The changing supply mix may partly stem from stretched affordability and land constraints in cities such as Toronto. The total number of housing

starts rose in 2017 but will likely taper off in the coming year.¹⁷ However, several housing developments in the pipeline and ongoing demand for renovation work will help sustain construction employment in Ontario.

Steady construction activity and a high number of expected retirees will put pressure on the industry's workforce. The start of several large projects that will pull hundreds of workers to the job site will stretch the labour pool to near capacity, which will create higher demand for labour in the near term.

Stronger manufacturing activity helped spark employment growth in the industry despite trade uncertainty

Employment grew by 17,900 in the provincial manufacturing industry in 2017. A small employment drop in the third quarter was offset by strong growth posted in the rest of the year. However, other labour market indicators point to mixed conditions across the manufacturing base in Ontario. The Markit Canada Manufacturing Purchasing Managers' Index (PMI) was in expansion mode for the entire year.¹⁸ Further, manufacturing sales increased for the fourth year in a row, but the value of manufacturing exports declined by 2.8% in 2017.¹⁹

Motor vehicle manufacturing recorded one of the largest gains in employment within the industry, as Canadian light vehicle sales continued to rise thanks to the popularity of sport utility vehicles and light trucks. However, optimism is tempered by the production decline at Canadian facilities following a robust 2016. Moving forward, recent investment announcements from some of the key automakers should continue to maintain production levels and support assembly work in the short run. Another area that performed well was food manufacturing, where total sales grew by more than 5.2% in 2017. New facilities, production lines, and homegrown establishments balanced closures and consolidations from a handful of the big multinational players. Chemical manufacturing was also strong in 2017, due in part to the job growth in pharmaceutical and medicine manufacturing. Employment in the wood product manufacturing industry also grew, despite uncertainties and additional tariffs levied on exporters due to the expiration of the Softwood Lumber Agreement. Although demand for Canadian lumber remained strong,²⁰ manufacturers will likely rely more on domestic sales going forward. Furniture manufacturers and some producers of construction-related goods received more work from solid building activity as well.

Year-over-year employment losses across areas of manufacturing were relatively small. Machinery manufacturing recorded a 1.0% employment decline, reversing a two-year growth trend. Electrical equipment, appliance and component manufacturing also saw modest drops in employment. The anticipated closure of a major motor manufacturer in Peterborough will likely add to these losses going forward. Metal producers had a mixed year in the province as well. Several metal fabricators and machine and tool shops increased operations as the demand for industrial metal goods picked up. Meanwhile, some steel producers faced uncertain moments with layoffs and restructuring plans. Stronger economic growth in the United States and a lower CAD should support healthier conditions in the manufacturing industry in the near term. This favourable climate may help producers better contend with global competition, capacity constraints, and the shift towards greater technology and skilled labour. One factor though that is currently at the forefront is the ongoing trade negotiations with the United States. Manufacturers and industry stakeholders will have to stand by for news on potential changes to NAFTA given its large impact on the automotive industry, as well as any additional tariffs applied against key commodities.

Wholesale trade employment gets downgraded despite boost in sales

After a stall in employment growth in 2016, employment in the wholesale industry was downgraded in 2017 by 16,200.²¹ Losses were driven by a decline in both full-time (-14,300) and part-time work (-1,900). However, the industry still has a much higher full-time employment rate compared to the Ontario industrial average.

Other employment indicators show moderate but positive growth in wholesale.²² Within the industry, any employment gains were driven by the pharmaceuticals, toiletries, cosmetics and sundries and the personal and household goods segments. Pharma sales showed only moderate growth in 2017, while the latter actually saw sales decline.²³ Machinery, equipment and supplies merchants also saw some employment growth while sales between December 2016 and December 2017 made up for nearly 50% of all wholesale trade. And while computer and communications equipment and supplies represents less than a tenth of the wholesale industry's total employment, sales in the subsector made up almost a quarter of the sales growth in the industry between December 2016 and December 2017.

Almost 30% of Ontario wholesale workers are employed in the machinery, equipment and supplies sub-industry. As employment grew over the year for machinery wholesaler,²⁴ so too did sales of machinery by manufacturers.²⁵ This is likely as a result of increased national investment on machinery and equipment investment throughout 2017.²⁶

Although the wholesale motor vehicle sector²⁷ had a strong 2016, employment sank in 2017 in the motor vehicle and parts segment despite strong sales growth. However, the new motor vehicle parts segment saw a dip in employment and falling sales.²⁸

The largest upset in the industry came out of the wholesale food segment where employment stalled and sales drastically declined. The cost of food has historically remained consistent with the rate of inflation until about 2008²⁹ when costs increased due to the country's heavier reliance on food imports.³⁰ Since then, the cost of food has remained higher than the cost of all items however, prices were held at bay between 2016 and 2017, as a result of Canada's sustained and elevated food exports and imports figures. Perhaps the equilibrium will help the faltering segment going forward, although the disruption of Amazon in the retail food market has meant drastic changes to the ways in which companies in the food industry do business.³¹

E-commerce disrupting many aspects of retail

Ontario's retail trade industry bounced back from earlier declines in 2017, adding 51,900 accounting for all of the gains in trade over the year.³² Although payroll data suggests a slight decline in employment, several sectors in particular saw growth including motor vehicle and parts dealers, general merchandise stores, and building material and garden equipment and supplies dealers.

The building material and garden equipment segment looks to continue its employment growth pattern going forward. Recently, successful television personalities in Ontario^{33,34,35} have partnered with companies in the home improvement sector. As home construction volume³⁶ pushes on, while the inventory of homes for sale plummet, home centre retailers are hoping to cash in on the next trend: Increased number of home improvement projects because of three factors: (i) Millennials are living longer with their parents than in the past,³⁷ potentially inciting home improvements to accommodate the growing space requirements; (ii) Multi-generational housing is increasing,³⁸ further supporting building material and garden equipment productivity growth; and (iii) New mortgage laws may be squeezing new home buyers into less costly 'fixer-uppers' rather than finished products. Sales in the sector have also risen more sharply than retail sales overall,³⁹ and wages tend to be higher than for retail as well; \$18.02 per hour compared to \$17.35.⁴⁰

On the other hand, employment losses in retail were most acute in the grocery store subsector, but employment also declined in clothing and accessories stores and non-store retailers.⁴¹ Going forward, changes in the grocery store segment are looming as Canada's largest grocery chain, Loblaw Companies Limited announced plans to close 22 stores across Canada.⁴²

Retailers across the board are consolidating along their supply chains. More companies are producing their own product lines or contracting out the manufacturing of private-label goods under a retailer's own brand. These offerings are growing in importance due to their higher profit margins and lower cost to the retailer,⁴³ spreading from groceries to over-the-counter drugs⁴⁴ and mass merchandise.⁴⁵ Lower cost of generic and in-store lines can also increase pressure on external suppliers to offer lower wholesaler prices. At the same time, Ontario retail markets have become more polarized by demand for high- and low-end consumer goods. More price-conscious households following the 2008 downturn⁴⁶ and growth in aspirational consumption⁴⁷ and "premiumization"⁴⁸ from the millennial cohort,⁴⁹ have adversely affected traditional middle-market stores while boosting the demand for both discount sellers and premium retailers. Thus while Sears Canada Inc. has shut down, low-cost stores such as Dollarama,⁵⁰ Giant Tiger⁵¹ are expanding, as are both incumbent and luxury retailers such as Costco Wholesale Canada Ltd,⁵² COS,⁵³ and Eleventy.⁵⁴

E-commerce continues to affect the retail industry and is seen as a threat to retail store profits and employment. This is especially true for Ontario, as domestic online retailers are dwarfed by internationals. The province's close proximity to several large U.S. commercial and population centres lowers shipping costs relative to other provinces and stimulates cross-border e-sales. E-commerce is growing, and is expected to reach about \$39B in Canada, or 9.5% of all retail purchases by 2019.⁵⁵ In 2017, the market share by food sales and, food prices were disrupted when Amazon, the warehousing and storage giant, bought out Whole Foods⁵⁶ and almost immediately dropped the prices of some of their staple goods to remain competitive.⁵⁷ In comparison, in 2015, only 1% of food sold in Canada was bought online due to the logistical and cost implications of delivering perishables.⁵⁸ Amazon is no doubt the key driver for the growth of online sales in Ontario and in Canada.⁵⁹

Nonetheless, increased online sales are expected to moderate growth in front-line sales staff and support an increase in retail distribution and logistics employment. However, a feedback effect may arise as retailers are also increasingly providing the option of delivering purchases to physical stores, stimulating walk-in sales and demand for in-store workers. Moreover, smaller retailers are also focused on reaching shoppers online as more individuals search the internet for information before a purchase. Though larger companies are better able to invest in digital offerings, online presence enables independent retailers to increase their market reach and focus on a niche product. This strategy may prove vital for smaller retailers that cannot undercut larger sellers' lower prices and higher volume sales going forward.

Transportation and warehousing industry continues upsurge

Transportation and warehousing employment grew by 14,200 between 2016 and 2017. Air transportation employment continued to benefit from airline profitability over the past year as depressed oil prices helped to maintain lower aviation fuel costs.⁶⁰ Air passenger traffic continued to increase in 2017, and is expected to double over the next few decades,⁶¹ supporting employment growth in the near term.

Strong retail and wholesale sales growth in Ontario and the resulting higher inventory turnover supported growth in warehousing and storage and ground cargo transport over the last year. Rising e-commerce sales may also stimulate some growth in domestic and international cargo volume as small businesses expand their international reach. For rail transport, there have been signs of recovery with an increase in both number of rail cars and total weight carried in 2017. As a result, a major Canadian railway carrier has begun a significant hiring spree across the country.⁶²

Employment in transit and ground passenger transportation has also increased slightly in the past year. Government investment in public transit and transportation is a key influencer of transit use. Combined with

growing urban density, large-scale transit projects in several urban centers in southern Ontario will likely support employment in this segment in the near-term.

In the mail and courier segments, ongoing technological shifts from physical letter and business mail to digital modes have been squeezing employment for several years. A saving grace may be increased parcel volume as e-commerce shipping volume rises to meet growing orders.

Finance, insurance, real estate and leasing industry (FIRE) undergoing a major digital shift

Employment in Ontario's FIRE industry grew in 2017 by 5,200, a 0.9% increase over 2016. Although this was the sector's fifth consecutive year of employment increases, the change in 2017 was far weaker than the additions reported in the previous two years (2015 and 2016). The Canadian FIRE sector is heavily concentrated in Ontario, accounting for almost half the nation's employment within the sector, and about two-thirds of those employed in Ontario are located in the Toronto economic region.⁶³

The FIRE industry includes two components: finance and insurance, and real estate and rental and leasing. While the finance and insurance segment accounts for the higher share of employment,⁶⁴ real estate and rental and leasing has the higher value-added.⁶⁵

The finance and insurance services subsector, primarily banks, is undergoing a major digital transformation and is advancing this strategy in partnership with a growing number of financial technology (FinTech) start-up companies,⁶⁶ as well as through digital factories/research and training hubs.^{67,68} The regulatory and compliance areas are also facing challenges with rising costs; regulation technology, (RegTech) is emerging as a possible framework for the sector to adapt to the changes.⁶⁹ As the sector restructures, several hundred positions were eliminated in the sector in 2017.^{70,71} In addition, banks continued to close many of the underperforming branches especially in rural areas. Outsourcing and and/or offshoring trends also mitigated some of the potential direct employment growth. With the strong focus on a digital strategy, the sector is generally placing emphasis on the recruitment of more data analytic and IT professionals, such as user experience designers, software engineers, computer programmers and data scientists.^{72,73}

Within the real estate and rental and leasing subsector, revenue rose sharply for offices of real estate agents and brokers and appraisers,⁷⁴ supported by the record levels of real estate activities and high home prices in many areas of Ontario in 2017.

Generally, the FIRE industry's profitability is closely tied to interest rates, household and business credit use, returns on investments and overall economic stability. Due to a confident economic outlook, the Bank of Canada raised the key interest rate in July 2017 for the first time in seven years.⁷⁵ However, the increase in interest rates, along with the new mortgage rules which came into effect January 1, 2018 for federally regulated financial institutions,⁷⁶ are expected to cool the residential real estate market. There are indications of an increase in borrowing from alternative lenders.⁷⁷

Professional, scientific and technical services (PSTS) driven by more technology & infrastructure investments

Employment growth has been stronger in the PSTS relative to all industries in Ontario, and in 2017, was up by 34,400, a 5.8% increase over 2016.⁷⁸ Generally, the single largest contributors to the sector are computer systems design and related services, and architectural, engineering and related services, which together account for just under half of the PSTS's total output and employment.^{79,80} Investments in research and development (R&D) are strong drivers for the performance of the PSTS.

Computer systems design firms are benefitting from customers' increasing reliance on advanced technology to drive their business growth. The segment includes a growing number of start-ups, supported by large private venture capital investments, and public sector funding. Among the advanced technology that continue to be deployed by these firms, are multiple computing platforms, faster access speeds, and stronger IT structures which are helping to reduce the risks and costs associated with rising cyber breaches.^{81,82,83} The delivery of the emerging 'cloud' computing services⁸⁴ and the ability of customers to scale their subscriptions on an on-demand and pay-for-use basis,⁸⁵ also generated opportunities for many of these companies over the past year.

Video game design and development services is a small but growing cluster in computer systems design and related services. Growth is expected in the global market especially in the app-based social game segment.^{86,87} This, along with provincial tax credits, should continue to fuel the industry's performance.⁸⁸

Healthy levels of residential and non-residential construction activities influenced demand for architectural and engineering services, especially as the province is rolling out its largest long-term infrastructure plan.^{89,90} Architectural and engineering services is a domestic-oriented industry,⁹¹ and most of the revenue is generated from engineering services.⁹²

Meanwhile, demand for management consulting services also increased,^{93,94,95} driven by factors such as the high frequency of organizational restructuring, the pervasiveness of digital technology, and market disruptions.

Similarly, employment grew in legal services.⁹⁶ However the sector could be facing a shifting landscape arising from elements such as the 'unbundling' of services,^{97,98,99} and technology related to artificial intelligence is poised to integrate into the delivery and access to services.^{100,101}

Demand in business, building and other support services (BBOSS) buoyed by outsourcing and changing labour market dynamics

Administrative and support services

The BBOSS sector is comprised of three main components,¹⁰² of which administrative and support services account for over 70% of employment and output.¹⁰³ The Administrative and support services segment includes: (i) Employment services; (ii) Services to buildings and dwellings; and (iii) Travel arrangement and reservation services. Employment services is the leading contributor to the sector.

According to the Labour Force Survey estimates, overall employment in BBOSS decreased by 11,400 (-3.5%) between 2016 and 2017.¹⁰⁴ On the contrary, the Survey of Employment, Payrolls and Hours (SEPH) reported growth of 7,258 (+1.9%) for the sector over the period.¹⁰⁵ Some of this discrepancy may be explained by the different collection methods of these two surveys and the data capture of individuals placed by employment services firms. The individuals provided by temporary help services are formally categorized as employees of these help services.

The employment services subsector continued to expand, supported by the rise in precarious employment and greater demand for temporary help services. Significant growth has been reported in the number of these agencies in Ontario over the past decade.¹⁰⁶ The skills gap, and growing trend in which companies outsource areas of human resource functions, also prompted service needs from executive agencies and search firms to recruit local and global high-skilled talent. Looking ahead, the gains in the temporary help services may be tempered by the recently introduced 'Bill 148, the Fair Workplaces, Better Jobs Act, 2017,' which includes increases in the minimum wage and new regulations regarding the employment standards for casual, part-time, temporary and seasonal employees.^{107,108}

In another component, the relatively high levels of construction investments added to the stock of facilities to be maintained by companies offering services to buildings and dwellings, which includes landscaping and janitorial services. Also, travel arrangement and reservation services posted higher revenues, as the sector continued to adapt its service strategy.^{109,110} However in the future, the sector is expected to have fewer brick-and-mortar establishments and more online and home-based businesses.¹¹¹

Waste management and remediation services

Waste management and remediation services is the smallest of the three subsectors in BBOSS.¹¹² The trend in which municipalities outsource some services to third party waste collection service providers, contributed to growth in the sector. Further, the public sector has focused on environmental and climate change issues resulting in several multi-million dollar projects for soil remediation of industrial sites, clean up of harbours,^{113,114} mercury-contaminated river system,¹¹⁵ and flood protection of waterfront areas,¹¹⁶ adding opportunities for remediation service providers.

Employment in educational services affected by changes to teacher's college programs

Employment in Ontario's educational services industry decreased by 5,700 (-1.1%) in 2017.¹¹⁷ Primary and secondary school teachers, the largest occupational group in this industry, observed a 5.1% decline in employment over 2017. Entry into this occupation has been competitive for a number of years, as 72% of new graduates from teacher's colleges were unemployed or underemployed in their first year as recently as 2013, although this number has improved significantly, falling to 38% of new graduates as of 2017.¹¹⁸

In terms of student enrolments, there were 1,993,430 kindergarten, elementary and secondary students in non-private schools in Ontario in 2015/16, a 0.5% decrease from the previous year. This was the first time in over two decades that the number of enrolments dipped below 2 million students, with enrolments having decreased every year in Ontario since 2002/03.¹¹⁹ The continued decrease in enrolments reflects the demographics of Ontario, as the birth rate continues to fall.¹²⁰ This shift will impact the demand for educational services over the medium-term forecast period, particularly for secondary school teachers.

In response to the oversupply of teachers in the market that became fully saturated by around 2013, the provincial government changed the academic framework for teacher's colleges in Ontario, effective as of 2015, by moving from a two-semester program to a four-semester program, which helped reduce the number of annual applicants from about 9,000 in 2014 to approximately 4,500 by 2015; remaining around that level as of 2017.¹²¹

With the heightened requirements for qualifying for a teacher's license in Ontario, the number of new teacher's licenses granted annually has dropped from an average of about 10,000 between 2008 to 2014 to about 4,000 on average from 2016 onwards, with the transition year of 2015 witnessing a dramatic one-time increase to 12,400 due to a large number of applicants wishing to obtain their license before the requirements were elevated.¹²²

Another major talking point for the Ontario education sector was the Ontario college strike in the 2017/18 academic year, which started on October 16, 2017. The strike was initiated by approximately 12,225 faculty from all 24 colleges in Ontario, organized under the Ontario Public Service Employees Union (OPSEU)'s college academic unit, whose collective agreement with the College Employer Council of Ontario had expired on September 30, 2017.¹²³ The strike ended as back-to-work legislation was passed by the Ontario government on November 19, 2017, where all outstanding issues, including wage increases,^{124,125} the issue of the full-time vs. part-time¹²⁶ and permanent vs. temporary academic staff ratios,¹²⁷ as well as academic freedom and the

exclusive control of the curriculum taught in the classrooms,¹²⁸ were referred to binding mediation-arbitration.^{129,130}

The strike raised a number of questions about the job security of college instructors, with colleges in Ontario collectively employing 45,810 people as of 2015/16, with 17,780 (38.8%) of these individuals employed full-time, and 28,030 (61.2%) employed part-time.^{131,132} The strike also severely disrupted the academic year of a large number of students, as there were more than 500,000 students enrolled in Ontario colleges in 2014/15, with about 225,660 registered as full-time students.^{133,134} Approximately 58% of entrants for the 2014/15 school year into the Ontario post-secondary system attended a college, compared to 42% attending a university, underscoring how significant the college system is to Ontario post-secondary students.

A growing and aging population will continue to push the demand for health care services in 2017

In 2017, the province saw an increase of 31,100 in health care and social assistance employment.¹³⁵ Employment growth will continue to be driven by Ontario's aging population. The share of seniors aged 65 and over is expected to grow from 16.8% to 17.6% in Ontario between 2017 and 2019.¹³⁶

In response to changing demographics and resulting pressures on the health care system, as well as the provincial government's goal to reduce its deficit, the Ontario Ministry of Health and Long-Term Care released the *Action Plan for Health Care* in January 2012, followed by the *Patients First: Action Plan for Health Care* update in 2015.^{137,138,139} The Plan readjusts investment within the health care industry to increase efficiency and support rising demand.¹⁴⁰ This has led to a shift in employment¹⁴¹ from programs and services at acute care settings like hospitals, to community care programs and facilities.

Employment in the health care sector has continued to grow despite government deficit reduction strategies.¹⁴² Growth at provincial hospitals is expected to be weak compared to other sub-industries because of the shift in funding from acute care settings to community care programs and facilities. However, growth in hospitals' base budget by 3% over 2017, an increase from 2016's 1% growth scenario, may provide some support for employment growth.¹⁴³ Many hospitals across the province announced cuts to the staff, budget shortfalls, and restructuring in the first half of 2017.^{144,145} Although the structure of funding for the health care system is changing, employment levels within ambulatory health care services should continue to rise as the growing and aging population generates demand for occupations such as dentists, general physicians, chiropractors and optometrists and funding moves towards expanding outpatient care and home and community-based care.¹⁴⁶ Additionally, investments in mental health services across the province will also create employment opportunities in this sector.^{147,148,149,150}

The provincial labour market for nurses remains somewhat unstable especially in the context of job cuts and budgetary shortfalls in acute care settings such as hospitals. However, retirements due to the aging workforce in this occupation may create employment opportunities.¹⁵¹ Employment opportunities should also arise from the provincial government's efforts to increase the capacity of long-term care homes and other community health care settings; address dementia and palliative care; address the opioid crisis; and support maternal and child health.^{152,153} Additionally, the Nursing Graduate Guarantee Initiative, extended in 2013, will continue to attract individuals to this occupation by connecting recent graduates from nursing programs with full-time employment opportunities.¹⁵⁴

The Government of Ontario is focusing on Indigenous health care in multiple ways. It recently announced an investment of \$222 million over three years, and more than \$104.5 million in ongoing annual funding for Ontario's First Nations Health Action Plan.¹⁵⁵ The plan's focus in increasing Indigenous populations' access to health care, by increasing capacity and providing culturally appropriate services, will likely create employment

growth for this sector. Additionally, recent federal and provincial investments in Indigenous midwifery programs,¹⁵⁶ mental health programming, expanded access to mental health professionals and traditional healers,^{157,158,159,160} are likely to create additional jobs for this sector.

As funding plans continue to roll out, employment is expected to grow in social assistance community care programs and facilities. Also, visiting homemakers, housekeepers, and related occupations may see growth in employment due to the increasing number of seniors who rely on these services.¹⁶¹

Employment growth in the information, culture and recreation (ICR) sector despite challenges by new technologies

Employment in the ICR sector declined by 5,100 (-1.6%) between 2016 and 2017.¹⁶² The proliferation and popularity of digital media is challenging and transforming the publishing, motion picture and sound recording, and broadcasting subsectors. For example, the prevalence and popularity of free online news content has negatively affected paid circulation of print materials. In addition, competition in the broadcasting industry is increasing with the popularity of online streaming videos.¹⁶³ The adoption of new technologies by consumers has impacted businesses across the province. Notable publishing announcements included a non-cash deal between Postmedia Network and Torstar, which resulted in Postmedia closing 23 papers, affecting 244 employees. In addition, Torstar closed 12 papers in Ontario, resulting in the loss of approximately 46 jobs.¹⁶⁴ Earlier in the year, Torstar dismissed 110 employees due to declining advertising revenue.¹⁶⁵

Regarding the arts, entertainment and recreation subsector of the ICR sector, business activities are highly sensitive to the level of consumer spending. In stronger economic times, consumers may spend more on leisure activities, with the opposite being true in slower periods. Although economic growth in Ontario is expected to remain healthy, discretionary spending may be reduced due to higher levels of household debt and the gradual rise of the Bank of Canada's benchmark interest rate.^{166,167} As Ontarians start to deleverage, a reduction in recreational spending may occur, constraining employment growth.

On the other hand, tourism may also support sector demand. The value of the CAD/USD exchange rate and the strength of the economies of other nations - particularly the U.S. due to its proximity to Ontario - drive much of the growth in tourism in Ontario.¹⁶⁸ A favourable exchange rate provides an incentive for visits to Canada and compels Canadians to take domestic trips.

Wages in accommodation and food services (AFS) grows in part due to rise in minimum wage

The Ontario accommodation and food services (AFS) industry employed a workforce of 454,300 in 2017, a decrease of 0.5% from the previous year.¹⁶⁹ Due to the lower educational and skill requirements relative to other industries, AFS is highly accessible to younger workers; in 2017, 39.3% of people employed in the industry were between the ages of 15 to 24, compared to 13.3% for Ontario as a whole.¹⁷⁰ In addition, many of the younger employees who join the AFS workforce are also drawn by the fewer hours required and temporary nature for many of the positions within the industry, due to their pursuit of educational or other opportunities. In 2017, 41.9% of those employed in AFS were in part-time employment, compared to 18.9% for all industries in Ontario.¹⁷¹ As well, those who held temporary positions such as seasonal, contract, or casual jobs accounted for 15.8% of the Ontario AFS, compared to 13.0% for the province as a whole.¹⁷²

Wages and benefits accounted for 28.9% of total operating expenses within the Ontario AFS industry in 2016.¹⁷³ The average hourly wages has remained the lowest among all industries in Ontario for a number of years. As of 2017, the average hourly wage was \$14.22, compared with \$23.95 for all industries in Ontario.¹⁷⁴ Although the average real hourly wages in AFS is much lower compared to all industries in Ontario, it has been

growing at a faster rate. Between 2006 and 2016, the average real¹⁷⁵ hourly wages in the industry increased by 12.2%, compared to 3.5% for all industries,¹⁷⁶ with AFS among the three fastest-growing industries for average real hourly wages. Since AFS has a much higher proportion of minimum-wage earners compared to other industries,¹⁷⁷ its wage growth can be attributed partly to increases in the real minimum wage, which rose by 24.0% between 2006 and 2016.¹⁷⁸

Purchases, materials and sub-contracts made up 35.7% of total expenses in the Ontario AFS industry in 2016, the largest category among expenses.¹⁷⁹ Indeed, nearly 60% of restaurant operators in Canada reported high food costs to be of significant concern in terms of impact to business, according to a survey of restaurant operators.¹⁸⁰ From 2002 onwards, the overall prices of food and of alcoholic beverages and tobacco products rose faster than any other core products in the CPI basket.¹⁸¹ This has been a global trend driven by a number of factors, including an increase in global demand, low supply and reserves of grains, high energy and fertilizer prices, and poor weather conditions.¹⁸²

Growth in tourism within Ontario is driven largely by strengths in Canadian and American economies, with tourists from the United States accounting for more than two-thirds of non-resident tourists into Ontario in 2016,¹⁸³ as well as the value of the CAD/USD exchange rate, along with oil and fuel prices.^{184,185} An inverse correlation exists between the CAD/USD exchange rate and the number of U.S. tourists visiting Ontario,¹⁸⁶ as the number of tourists from the U.S. dropped continuously throughout the 2000's, before starting to climb up in recent years as the CAD grew weaker after a period of flirting with parity with the USD. While tourism from the U.S. has only recently been improving, the number of tourists from non-U.S. countries has increased every year since 2009, and now account for 27.7% of total non-resident tourists, up from 21.1% in 2009,¹⁸⁷ with the Canadian tourism industry continuing to market itself beyond the US to the rest of the world.¹⁸⁸

Other services employment remains virtually level

Employment in the other services category remained virtually level between 2016 and 2017, with 275,900 employed in the category in Ontario in 2017. Other services is a diverse industrial grouping that includes repair and maintenance; personal and laundry services; religious, grant-making, civic, and professional and similar organizations; and private households. The demand for other services is driven by many factors. Aging population demographics affect demand for services such as the funeral homes sub-industry, which is expected to grow over the coming years. Meanwhile, increasing expenditures in fields such as automotive repair and maintenance could also sustain employment in the other services industry.

Public administration

Employment grew in Ontario's public administration industry with the addition of 18,200 jobs in 2017, or a 5.2% increase over 2016.¹⁸⁹ Job gains were reported in all areas of public administration, but largely in local and municipal, and provincial public administration.¹⁹⁰ Population increases in many areas of Ontario, the roll out of large infrastructure projects, and other socio-economic initiatives^{191,192} added service needs and are likely strong factors contributing to higher employment in these departments. Further, the federal government also ramped up hiring following cutbacks a few years earlier.¹⁹³ In 2017, employment growth in Aboriginal public administration was at its highest since 2012.¹⁹⁴ Several funding commitments have been made to advance reconciliation, improve quality of life, and promote skills and opportunities for Indigenous Peoples,¹⁹⁵ which may explain this notable employment increase over the period.

Table 2: Annual Labour Force Statistics in Ontario, Employment by Industry

Employment ('000) Seasonally Unadjusted Data	Year			2016 to 2017		2015 to 2016	
	2017	2016	2015	Number	%	Number	%
Total employed, all industries	7,128.0	6,999.6	6,923.2	128.4	1.8	76.4	1.1
Goods-producing sector	1,432.6	1,418.1	1,401.4	14.5	1.0	16.7	1.2
Agriculture	68.5	77.7	76.9	-9.2	-11.8	0.8	1.0
Forestry, fishing, mining, quarrying, oil and gas	35.1	35.8	43.3	-0.7	-2.0	-7.5	-17.3
Utilities	47.2	49.5	49.4	-2.3	-4.6	0.1	0.2
Construction	512.5	503.7	487.3	8.8	1.7	16.4	3.4
Manufacturing	769.3	751.4	744.6	17.9	2.4	6.8	0.9
Services-producing sector	5,695.4	5,581.4	5,521.7	114	2.0	59.7	1.1
Trade	1,068.9	1,033.2	1,042.3	35.7	3.5	-9.1	-0.9
Transportation and warehousing	341.4	327.2	321.3	14.2	4.3	5.9	1.8
Finance, insurance, real estate and leasing	560.5	555.3	543.5	5.2	0.9	11.8	2.2
Professional, scientific and technical services	629.0	594.6	579.6	34.4	5.8	15.0	2.6
Business, building and other support services	314.7	326.1	333.4	-11.4	-3.5	-7.3	-2.2
Educational services	497.1	502.8	514.9	-5.7	-1.1	-12.1	-2.3
Health care and social assistance	869.5	838.4	812.5	31.1	3.7	25.9	3.2
Information, culture and recreation	312.9	318	309.5	-5.1	-1.6	8.5	2.7
Accommodation and food services	454.3	456.8	444.3	-2.5	-0.5	12.5	2.8
Other services	275.9	276.1	276.3	-0.2	-0.1	-0.2	-0.1
Public administration	371.2	353.0	344.0	18.2	5.2	9.0	2.6

Note: Totals may not add due to rounding.

Source: Statistics Canada's Labour Force Survey - CANSIM Table 282-0008

Employment by Age and Sex

Employment grew fastest among older workers in 2017

Older workers aged 55 years and over experienced the largest employment growth among workers in Ontario, with gains of 54,500 (+3.7%) in 2017. As well, there were strong gains of 24,100 (+2.6%) among youths aged 15 to 24 years, while core-aged workers aged 25 to 54 years increased by 50,000 (+1.1%) people.¹⁹⁶

Due mainly to the ongoing transition of the baby-boom generation into the older workers segment, workers aged 55 years and over have had the fastest employment growth every year since 2000. Older workers comprised 21.5% of the employed workforce in 2017, with the proportion having increased uninterrupted for

over a decade whereas youth accounted for 13.3%, slightly increased from 2016. Core-aged workers comprised 65.2% of the employed workforce, with the proportion having decreased steadily over the decade.

The youth unemployment rate decreased to 12.3% in 2017, reaching its lowest level since 2000. While youth unemployment fell significantly by 18,000 in 2017, there was also an increase of 6,100 in the youth labour force, with the youth participation rate rising by 0.4 percentage points to 60.7%. The unemployment rate for older workers was 4.5% in 2017, while core-aged workers observed an unemployment rate of 5.0%, with the unemployment rate for all age groups reaching its lowest level since 2000.

Employment grew at a slightly faster rate for women (+1.9%) compared to for men (+1.8%) in 2017, with women still constituting 48.1% of the employed workforce in Ontario.

Table 3: Annual Unemployment Rates by Age and Gender in Ontario

Unemployment Rate (%) Seasonally Unadjusted Data	Year			2016 to 2017	2015 to 2016
	2017	2016	2015	Number	Number
Total	6.0	6.5	6.8	-0.5	-0.3
25 years and over	4.9	5.3	5.4	-0.4	-0.1
Men - 25 years and over	4.9	5.2	5.5	-0.3	-0.3
Women - 25 years and over	4.9	5.3	5.3	-0.4	0.0
15 to 24 years	12.3	14.0	14.7	-1.7	-0.7
Men - 15 to 24 years	13.7	15.5	16.3	-1.8	-0.8
Women - 15 to 24 years	10.8	12.5	13.1	-1.7	-0.6

Source: Statistics Canada's Labour Force Survey - CANSIM Table 282-0002

Local Labour Market Conditions

The province of Ontario is divided into eleven economic regions. These areas were created by an agreement between Statistics Canada and the province of Ontario and are used for both the Labour Force Survey and the Census. Employment grew across most economic regions in the province in 2017, supporting a rosier overall job market. By virtue of its size, the **Toronto** economic region saw the largest job gains and employment grew at the fastest rate in **Muskoka–Kawartha**. Employment declined only in the economic regions of **Kingston–Pembroke**, **London** and the **Northeast** but at a moderate rate.¹⁹⁷

Full-time employment gains to the rescue in the Ottawa economic region

The Ottawa economic region posted modest gains in 2017, adding about 2,900 jobs to the labour market. Full-time employment rose by 6,400 following two consecutive years of losses. However, part-time employment, which has shown positive growth over the last few years, saw a decline of about 3,500. The unemployment rate presented solid improvement, decreasing 0.8 percentage points to 5.7%, following six years of stagnation. Although Ottawa's participation and employment rates have dropped for three consecutive years, both rates remain among one of Ontario's highest. For that reason, the region retains its favourable position relative to the rest of Ontario, despite mixed economic performance in recent years.¹⁹⁸

While the goods-producing sector in Ottawa added 2,700 workers in 2017, the sector was weighed down by employment losses in the agriculture industry. Agriculture has been struggling in this region for the past ten years, and this most recent loss of 1,100 jobs was its fifth consecutive year of employment deficits. In contrast, a number of infrastructure projects provided a welcome boost to the construction industry, which added 2,700 jobs following a loss of 5,100 jobs in 2016.¹⁹⁹ The value of residential and non-residential building permits increased 6.5% in 2017, further strengthening the industry.²⁰⁰ Several large construction projects in the economic region contributed to this boost, including the new Ciena Corporation campus,²⁰¹ continued construction on the LRT,^{202,203} and the University of Ottawa's new \$155M Science, Technology, Engineering and Mathematics (STEM) Complex.²⁰⁴

The services-producing sector as a whole remained virtually unchanged compared to last year; however, there was significant movement within the sector.²⁰⁵ Employment in public administration grew by 18,500 in 2017, which may be partly attributed to Canada 150 celebrations and events²⁰⁶ and infrastructure spending,²⁰⁷ tempering losses in many other industries. Several major industries lost jobs in the region including health care and social assistance (-6,500), business, building and other support services (-6,200), and educational services (-4,600).²⁰⁸ In 2017, several school closures were announced in the region, and due to funding cuts,²⁰⁹ and a number of positions were eliminated at the Ottawa Hospital.^{210,211}

Employment growth in Kingston–Pembroke remains stable over the long-term despite 2017 losses

In 2017, employment in the Region fell by 4,400 to 208,100 (-2.1%), following a strong 2016 in which 11,500 workers were gained. However, the unemployment rate still fell 0.2 percentage points to 5.8%, one of its lowest levels in the past 16 years. This downturn in employment can in part be attributed to a decrease in the labour market participation in the region and a decrease in part-time workers that offset a small increase in full-time workers.²¹² While the participation rate in Kingston–Pembroke has historically been one of the lowest in Ontario, it decreased 1.6 percentage points to 58.1%.²¹³

Losses for the region were particularly acute in the finance, insurance, real estate, rental and leasing industry (-4,700), which more than accounted for all of the setbacks for the region between 2016 and 2017.²¹⁴ Although there were no major reports of losses over the year, The Great-West Life Assurance Company announced they would cut 1,500 positions across Canada over the next two years, which may have affected the sector. Furthermore, between 2015 and 2016, there was a large increase in finance, insurance, real estate, rental and leasing employment, and the 2015 to 2017 figure shows a more stable picture (+200 between 2015 and 2017) over the long-term.

Employment gains in the Kingston–Pembroke region in 2017 were realized in the professional, scientific and technical services industry, where a number of public and private investments added 3,000 jobs to the regional economy.²¹⁵ Public investment in the segment included the Northumberland Community Futures Development Corporation which helped finance five local technology startups in order to accelerate their growth, support local supply chain integration and create high-quality technical jobs in the region.²¹⁶ Private investment included SNC Lavalin opening a new office in Kingston²¹⁷ and the opening of a new facility in Kingston by Performance Plants Inc., an agricultural and biofuel company.²¹⁸ Significant growth also occurred in public administration and other services.²¹⁹

The Kingston-Pembroke construction industry performed well in 2017, where a number of public and private investments boosted regional construction employment by 1,200. Several projects were supported by various levels of government, including hospital upgrades for the Kingston General Hospital, the Hotel Dieu Hospital and the Providence Care Hospital,²²⁰ investing in a new bridge over the Cataraqui River in Kingston²²¹ and construction on a new Quinte West Fire and Emergency Services headquarters in Quinte West.²²² On the private investment side, construction began on the new Hampton hotel in Belleville,²²³ as well as St. Patrick

Church's new parish hall in Lennox and Addington County.²²⁴ Manufacturing employment has remained relatively stable since 6,200 workers were lost in 2015, even though manufacturing employment fell by 900 between 2015 and 2017.²²⁵ Several manufacturers announced they would be hiring in the region, such as Canada Royal Milk ULC,²²⁶ Direct Coil Inc.,²²⁷ Hain Celestial Canada²²⁸ and SRB Technologies (Canada) Inc.²²⁹

Muskoka–Kawartha experienced larger employment growth

In 2017, the Muskoka–Kawartha economic region experienced strong employment growth and recouped more of the losses registered since 2015. Over the year, employment rose by 10,800 (6.3%) even though the unemployment rate increased from 5.7% to 5.9%. The rise of the unemployment rate is likely caused by the regions increasing labour market participation. The participation rate in 2017 was 58.3%, registering its highest since 2014.²³⁰

Muskoka–Kawartha is frequently known as “Cottage Country” in southern Ontario, as it serves as a popular retirement destination due its close proximity to the Toronto economic region. The older age profile of the region is also a large factor, as the median was 45.3 years during the 2016 Census, compared with the Ontario average of 41.3 years.²³¹ More recently, 60% of all migrants from other areas of Ontario to the region were 45 years of age or older for the period of July 2016 to June 2017.²³²

Perhaps another sign of the region's aging population is the declining school enrollment, which caused Kawartha Pine Ridge District School Board to reduce teaching staff in 2016.²³³ However, the region has seen some investments in construction, by the restoring and repairing of dams, locks, canal walls, and other structures along the Trent-Severn Waterway,²³⁴ the building of a \$25M seniors' apartment complex in Peterborough,²³⁵ the construction on the Hospice Peterborough Care Center²³⁶ and the building of a new twin-pad arena at Trent University.²³⁷

In the coming year, this region should see a number of large construction projects going forward starting with the new wastewater treatment plant and condominium units in Muskoka,²³⁸ and construction of the new Canadian Canoe Museum in Peterborough.²³⁹ Employment in the retail sector has been improving in this region. Closures of a Sears store in Cobourg,²⁴⁰ and Bracebridge's Metro grocer²⁴¹ in 2016 should be offset by the opening of a new Home Hardware Building Centre,²⁴² and new retail tenants in the Northumberland Mall in Cobourg²⁴³ as well as a new Food Basics grocery store in Bracebridge.²⁴⁴ While the cutbacks by General Electric Canada in Peterborough²⁴⁵ added to the Region's manufacturing job losses in 2016, the investments in manufacturing made by the Government of Canada,²⁴⁶ Kawartha Metals in Peterborough²⁴⁷, Ventura Plastics in Peterborough,²⁴⁸ the start of construction on an new brewery-style pub in Huntsville by Lake of Bays Brewing Company²⁴⁹ and FV Pharma's plans to open a medical marijuana facility in Cobourg's former Kraft plant,²⁵⁰ may offer some future opportunities for those affected.

Toronto employment growth driven by services-producing sector

Employment in the Toronto economic region continued its upward growth in 2017, by 69,700 over 2016. Gains were realized in both full-time and part-time employment. The number of unemployed fell by 16,700, driving the region's unemployment rate lower; from 6.9% to 6.4%.²⁵¹

After three consecutive years of growth, the goods-producing sector experienced a decline in employment, led by a notable decrease in the construction sector. However, construction employment moderated back to 2015 levels in the region (+500 between 2015 and 2017),²⁵² likely as a result of fewer annual housing starts, as many residential construction projects have ended and there were fewer new developments starting up.²⁵³ Some major construction news in the region include the renovation and a new patient care tower at the Michael Garron Hospital;²⁵⁴ the expansion of the Manulife Centre²⁵⁵ and the construction of the 85-storey “The One”

condominium project;²⁵⁶ Cooksville GO station redevelopment²⁵⁷ and Bowmanville GO station expansion;²⁵⁸ and the water main project at the Mississauga City Centre;²⁵⁹ Ongoing construction projects include the Eglinton Crosstown Light Rail Transit project to be completed in 2021;²⁶⁰ the construction of Mackenzie Vaughan Hospital to be built by 2020;²⁶¹ and the Darlington Nuclear plant refurbishment.²⁶² Manufacturing recorded its second consecutive year of growth in 2017 with gains of 6,300 over 2016, however still well below historic levels. Alstom Canada Inc., a manufacturer of light rail vehicle cars, will establish a plant in Brampton, creating 120 jobs.²⁶³ Olymel LP, a meat processing company, will create 100 new jobs at its Brampton locations.²⁶⁴ Cyclone Manufacturing Inc., an aircraft parts manufacturer, continues to expand in Mississauga, creating 132 jobs.²⁶⁵ Meanwhile, long time food manufacturer, Campbell Co. of Canada, will relocate its plant in Etobicoke, resulting in the loss of 380 jobs.²⁶⁶

Wholesale and retail trade, transportation and warehousing and health care and social assistance accounted for the bulk of the employment growth in the services-producing sector. A number of new retailers opened locations in the Toronto area, including Saks Fifth Avenue OFF 5th,²⁶⁷ Nordstrom Rack²⁶⁸ and Sunrise Records.²⁶⁹ This growth was partially offset with closings such as Sears Canada,²⁷⁰ Loblaw Companies Ltd.²⁷¹ and HMV.²⁷² The Toronto film industry continues to grow with the expansion of Pinewood Toronto Studios²⁷³ and the construction on Cinespace Film Studios.²⁷⁴ The warehousing sector was boosted by Bradford White Canada, a water heater manufacturer, opening a 75,000-sq.-ft. distribution and training centre in Halton Hills.²⁷⁵

In other news, the professional, scientific and technical services sector was strengthened in the Toronto area due to investments from Salesforce.com,²⁷⁶ AppDirect,²⁷⁷ MDA,²⁷⁸ Think Research Corporation,²⁷⁹ and Legend 3D Incorporated.²⁸⁰

Professional, scientific and technical services in Kitchener–Waterloo–Barrie strengthen as construction ramps up

Employment in Kitchener–Waterloo–Barrie improved over the last year, with strong gains in full-time employment, and only slight losses in part-time work. The unemployment rate in the region declined to 5.1% and the participation rate inched up by 0.3% from the previous year to a strong 68.7%. The Kitchener–Waterloo–Barrie region had the highest participation rate in the province in 2017 and the second lowest rate of unemployment, bested only by the region of Stratford–Bruce Peninsula (4.5%).

The region's professional, scientific and technical services industry continued to gain employment ground in 2017²⁸¹ and remains a vital industry, particularly around the southwestern Waterloo technology hub. A recent industry report has identified the Waterloo Region's tech community as the fastest growing sector in Canada.²⁸² Employment in this industry has grown by over 23% in this region over the past five years.²⁸³ This is highlighted by the regional expansion of such firms as Shopify Inc.,²⁸⁴ ESentire Inc.,²⁸⁵ Communitel's Data Hub²⁸⁶ and Atomic Labs²⁸⁷.

Following a year of receding employment in Kitchener–Waterloo–Barrie region's construction industry, employment in 2017 hit a record high, increasing by almost 10% compared to 2016.²⁸⁸ Building permit values peaked in the second half of 2016 supporting activity in 2017 and strength will likely persist as permit values rose again in late-2017. Residential building permit values have been steadily increasing throughout 2017 in both the Kitchener-Cambridge-Waterloo Census Metropolitan Area (CMA) and in the Barrie CMA. Some analysts expect that as many as 20 new developments worth over \$1.2B in downtown Kitchener will break ground by 2019.²⁸⁹

The impact of the Ontario Fair Housing Plan implementation led to a brief cooling period in the Kitchener-Waterloo area in the first half of 2017, but the spillover effect of the GTA's hot housing market continues to drive demand for homes in this region.²⁹⁰ The values of non-residential building permits in both CMAs are up in

2017 from the year before. While Kitchener-Cambridge-Waterloo CMA saw a slight drop in residential building permit values from the year before, the values of its industrial building permits almost doubled. Barrie CMAs multiple residential unit permit values doubled as well in 2017 and the institutional and governmental values increased by over two hundred percent compared to 2016. Various significant institutional and governmental developments in the Barrie CMA and the immediate region included a \$30M investment towards construction of an Advanced Technology, Innovation and Research Centre in Barrie,²⁹¹ an expansion of the Georgian Bay General Hospital in Midland,²⁹² and the construction of the Great Northern Exhibition's grounds in the Township of Clearview.²⁹³

The region had a number of large construction projects start in 2017 including: the construction of a \$144M Groves Memorial Community Hospital in Wellington County;²⁹⁴ a \$120M Gaslight District multi-use development that will feature two residential towers, a tech hub, business accelerator and retail space in Cambridge at the former Southworks Outlet Mall site;²⁹⁵ and a \$35M David Johnston Research and Technology Park in Waterloo.²⁹⁶

Guelph and its neighbours also saw a number of construction projects commence such as the \$15.5M Livestock Research and Innovation Centre - Beef Facility in Elora,²⁹⁷ a \$15.1M upgrade to the Victoria Road Recreation Centre in Guelph,²⁹⁸ and new housing development at the site of the former Biltmore Hats factory in Guelph.²⁹⁹

The region's manufacturing industry in 2017 sustained its strong gains from the previous year, fuelled by government support for the key auto-sector and soaring North American car and truck sales.³⁰⁰ Federal and provincial support helped Honda of Canada to invest almost \$500M towards an upgrade of its Alliston facility at the year's onset.³⁰¹ Various other forms of government and private investments towards a range of automotive related manufacturing initiatives have created hundreds of new jobs and continue to support a healthy manufacturing sector in the region.³⁰² Outside of auto manufacturing, provincial funding helped Polycorp Ltd., a manufacturer of engineered rubber parts in Elora, expand their manufacturing operations and increase their workforce.³⁰³

A number of craft breweries have established new brewing facilities throughout the region. Amongst them are the Koochaching Brewing Co. in Orillia and Blyth Brewing & Distilling Inc. which opened Cowbell Brewery in Blyth with a restaurant and an event center.³⁰⁴ Established brewers in the region regrouped and grew as Brick Brewing Co. Limited invested in its Kitchener operations and shut down its Formosa Springs Brewery in Bruce County³⁰⁵ and Sleeman Breweries Ltd. returned some of its production from United States to Guelph and invested \$7M towards its equipment and packaging capabilities.³⁰⁶

Two large medical marijuana producers are growing in the region and creating hundreds of new jobs. In the Township of Clearview, Peace Naturals Project Inc. is expanding and is expected to create an additional 100 jobs in 2018³⁰⁷, while MedReleaf Corp. in Bradford was looking to hire 250 full-time and 100 part-time employees last year.³⁰⁸

While the regions manufacturing sector had an overall net positive growth, a number of large employers restructured their operations resulting in layoffs. Some of the biggest layoffs came from manufacturers in Cambridge where Rimowa, a luggage manufacturer, laid off 149 employees³⁰⁹ and Com Dev International, an aerospace manufacturer, laid off 140 employees³¹⁰ in 2017.

After several province-wide retail closures continued in 2016, the retail trade sector in the region has bounced back in 2017 as several large retailers have created hundreds of jobs in the region. Amongst the largest contributors to job creation were Costco Wholesale Canada Ltd. in Orillia,³¹¹ and Canadian Tire Corporation, Ltd. in Elmira.³¹² Additional retail opportunities were created by PetSmart in Barrie,³¹³ The Great Canadian Dollar Store in Bradford,³¹⁴ Lowe's in Kitchener,³¹⁵ and Vince's Market in Alliston.³¹⁶

Hamilton–Niagara Peninsula labour market sees solid growth, led by manufacturing

Employment in the Hamilton–Niagara Peninsula economic region reached a new peak in 2017, increasing significantly by 28,700 over 2016. Gains were realized in both full and part-time work. The number of unemployed fell notably by 7,000, pushing the unemployment rate down to a historic low of 5.3%. Infrastructure spending across the province will benefit the economic region. The City of Hamilton will receive up to \$1B from the Government of Ontario for a cross-town Light Rail Transit line, scheduled for construction in 2019.³¹⁷

The goods-producing sector saw a solid increase in employment of 9,500, led by a significant boost in manufacturing of 9,600. Some positive news on the manufacturing front includes the expansion of the Ferrero Canada Ltd. plant in Brantford; the expansion of the Titan Trailers Inc. facility in Courtland;³¹⁸ and Tulsar Canada Ltd.'s move to its new facility in Brantford, expected to create 150 jobs.³¹⁹ The construction sector contributed modestly to this gain, adding 1,800 jobs.³²⁰ A number of construction projects are taking place in the region, including the \$330M Woodward Avenue Wastewater Treatment Plant upgrade in Hamilton, scheduled for completion in 2022.³²¹ Other projects in the region include the construction of a 5,000-seat entertainment centre in Niagara Falls³²² and the Confederation GO train station in East Hamilton, slated to open in 2019.³²³

The services-producing sector recorded its fourth consecutive year of employment growth in 2017, led by notable growth in wholesale and retail trade and professional, scientific and technical services. This growth was partially offset by a decline in the information, culture and recreation sector. Retail openings in Hamilton include Costco Wholesale Canada Ltd.³²⁴ as well as a Farm Boy³²⁵ grocery store which hopes to fill 140 positions. In addition, A. Lococo Wholesale Ltd. opened a new grocery store in Brantford, hiring 60 employees.³²⁶ Some other news in the region includes Westbrook Floral Ltd.³²⁷ consolidating its warehouse services from Grimsby to Beamsville, as well as Stelco Inc. continuing to restructure its Hamilton and Nanticoke operations.³²⁸ Also, Tweed Farms Inc. purchased land to expand their cannabis production greenhouse facility in Niagara-on-the-Lake, creating an additional 100 full-time jobs.³²⁹

Part-time employment in London experienced growth in 2017

Employment weakened slightly in the London economic region over the past year. Gains in part-time employment offset losses in full-time work. The number of unemployed residents also fell pushing the unemployment rate down to 5.6%. The participation rate declined significantly as fewer residents were active in the job market.³³⁰

Some labour market challenges in London, as outlined by the Elgin Middlesex Oxford Workforce Planning and Development Board, includes an apparent disconnect between the jobs available in the labour market and what employers are seeking. This is often referred to as the 'skills gap', which is particularly acute in the manufacturing sector.³³¹ Local labour market councils are attempting to close this gap via intergovernmental committees. After a strong 2016, the region's manufacturing sector decreased by 2,000 jobs in 2017. General Motors of Canada Company (GM) announced that it will cut 625 jobs at its CAMI Automotive Inc. assembly plant in Ingersoll.³³² As well the closure of Firestone Fibers & Textiles Company in Woodstock and General Dynamics Land Systems in London was less encouraging. However, various other forms of government and private investments,³³³ expansions³³⁴ and acquisitions will offset the loss over the next couple of years.³³⁵

There was some good news for auto-parts manufacturers in the region. Provincial funding will help Armo-Tool expand its London facility retaining 145 positions and creating 15 new jobs. GOSS Global will open an automotive parts plant³³⁶ and KSR International Co will expand its production and invest in new equipment which has renewed some optimism heading into 2018.³³⁷ Strong motor vehicle sales in North America have

spurred greater production and investments from local parts suppliers such as Sodecia North America Inc.,³³⁸ Ramsden Industries and Steel Technologies LLC.

Construction employment strengthened by 3,300 in London in 2017; The region saw major projects such as the 35,000-sq.-ft. OPP Communications Centre,³³⁹ Creative Property Developments Inc.,³⁴⁰ the BMO Centre/London Optimist Sports Centre.³⁴¹ Regional transportation infrastructure projects are also moving forward such as the Government of Canada's \$37M investment in 54 transit projects in London.³⁴²

London continues to have a growing technology sector. Several technology firms that expanded their footprint in the region over the past year included Vehikl,³⁴³ Clausehound, and investment opportunities emerged such as FedDev Ontario's investment in the TechAlliance of Southwestern Ontario's BURST program.³⁴⁴

In other news, the professional, scientific and technical services sector was strengthened in the London area due to investments from the following companies: Salesforce.com, AppDirect, MDA, Think Research Corporation, and Legend 3D Inc. High-tech research facilities are being built at the Western University in London.³⁴⁵

Solid employment growth shaped by several key developments in Windsor–Sarnia

The Windsor–Sarnia economic region posted a very mild employment loss year-over-year. The number of unemployed workers shrank, driving the region's unemployment rate lower; from 6.6% to 6.1%. However, gains in part-time employment partially offset losses in full-time work. The participation rate sank to its lowest level in over a decade as fewer residents were active in the job market.³⁴⁶

Some labour market challenges in the region include the skills gap, which is particularly acute in the manufacturing sector. In addition, it has been found that one in four children live below the poverty line and youth unemployment in the region was much higher than in the rest of the province. As a result, the intergovernmental committees are searching out ways to address the underlying issues.³⁴⁷

The health care and social assistance industry received some bad news with the closure of the Sonshine Day Care Centre and downsizing at Chatham-Kent Health Alliance. However, several restaurants opened in the region which may help revive job opportunities in accommodations and food services.³⁴⁸

After three consecutive years of growth, the goods-producing sector experienced a decline in employment, led by a decrease in employment in the manufacturing and agriculture sector.³⁴⁹ Fiat Chrysler Automobile's announced that it would close down its operations in Windsor potentially affecting about 295 positions.³⁵⁰ However, various other forms of government and private investments will offset the loss over the next couple of years.^{351,352}

The region's agricultural industry saw good news stories heading into 2017 with Mucci Farms expansion to create largest greenhouse strawberry grower in North America, adding 100 positions.³⁵³ As well as NatureFresh Farms building a new \$4M distribution centre should result in new jobs.³⁵⁴

A number of significant construction projects are taking place in the region including, an \$86M contract to be shared amongst Prysmian Cables and Systems Canada Ltd, Valard Construction LP, Amico Infrastructures Inc. and Mid-South Contractors Ltd,³⁵⁵ Union Gas Ltd.'s pipeline,³⁵⁶ \$25M project by EnWin Utilities Ltd. on a new water reservoir,³⁵⁷ \$3.6M in upgrades of multiple schools across the region,³⁵⁸ \$2.5M addition of a new library branch at the Optimist Community Centre,³⁵⁹ \$10M restoration project at the Walker Power Building,³⁶⁰ and \$25M retail development in Windsor.³⁶¹

Labour market conditions in Stratford–Bruce Peninsula show significant improvements in 2017

In 2017, the Stratford–Bruce Peninsula economic region experienced an increase in employment and saw an overall decrease in unemployment for the third consecutive year.³⁶² The growth in full-time work was the highest in the last five years and offset the decrease in part-time work. The participation rate recovered over the last two years as more residents were active in the job market.

The region's construction industry continued to flourish in 2017 with a 28% increase in combined residential and non-residential investments.³⁶³ The region's housing market also remained strong with residential building permits up 36.3% in 2017.³⁶⁴ In addition to growth in single family homes,³⁶⁵ the number of multi-family building permits increased in the region.³⁶⁶ Non-residential construction saw significant increases in public, industrial and commercial investments, which contributed to the overall growth in the region. Industrial and commercial investments benefited the construction industry across the region and included a new \$20M chick hatchery in Stratford,³⁶⁷ the new North Perth recreation complex and a new fire station in Monkton.³⁶⁸ Public investment was up nearly 60% over last year and represented a five-year high in the region. This growth is attributed to various projects across the region, such as new schools in Meaford³⁶⁹ and Bluewater,³⁷⁰ the Goderich Harbour expansion,³⁷¹ and several other projects.

The local manufacturing industry received a boost with a few large developments. Three craft breweries opened in Huron County³⁷² and Blyth,³⁷³ while Sofina Foods Inc. and Exceldor Foods expanded production capacity.³⁷⁴ The region continues to grow its medicinal marijuana industry in Kincardine with Supreme Pharmaceuticals purchasing additional land to build an indoor cultivation facility.³⁷⁵ Delmar Foods have now taken over the closed Kraft Heinz facilities to produce condiments from local produce. Further expansions included Atwood Heritage Processing Inc., C.R. Plastic Products Inc., FIO Automotive Canada Corp., and Hayashi Canada Inc.³⁷⁶

The last five years has seen a growth in the region's Information and Communication Technology (ICT) industry since the opening of the University of Waterloo Stratford Campus. This, combined with the Wright Business Park, has created a niche for new digital start-ups as well as established corporations.³⁷⁷ Recently the area was selected to be a testing ground for autonomous driving over the next five years.³⁷⁸

Employment growth in a slumber in the Northeast economic region as the service-producing sector wavers

Employment in the Northeast economic region fell by 2,300 in 2017, resulting in a net decrease of 9,800 since its recent peak in 2012. Most of the losses were in full-time employment. Both the population and participation rate dropped as residents left the region to find work elsewhere or exited the local labour market. This is reflected in the unemployment rate which decreased by 0.4 percentage points.³⁷⁹

Employment in the goods producing sector saw some positive movement in 2017, whereas the service producing sector had a much less favourable performance. Construction and manufacturing led the goods producing sector with significant employment growth throughout most of the region. Fuelled by various levels of government support and private investments in the construction sector a number of large projects have emerged across the region including a \$26.3M Learners' Centre for medical professionals in Sudbury,³⁸⁰ an \$11.7M integrated emergency services complex at Northern College³⁸¹ in Timmins, and construction of a \$12.5M Place des Arts in Sudbury.³⁸² The District School Board Ontario North East also invested over \$18M towards capital improvements at its schools. The manufacturing sector has increased how many people it employs with a several positive moves by industry giants operating in the region, Tenaris Algoma Tubes Inc.³⁸³ and Essar Steel Algoma Inc.³⁸⁴ In addition the Ontario Northland Transportation Commission³⁸⁵ on boarded 60 skilled workers at its remanufacturing and repair division in North Bay, and Phoenix Building Components Inc. purchased the former Kent Trusses Ltd. plant in Sundridge and hired 60 staff.³⁸⁶

In contrast, public administration, wholesale and retail trade, and transportation and warehousing endured the greatest employment losses in 2017. The Northeast region was not spared by the Sears Canada Inc. closures as the company closed its Timmins Square location and eliminated 62 positions.³⁸⁷ City Surplus Store, a long term resident of Sudbury, closed in 2017 as well.³⁸⁸ In their place a number of smaller retailers have popped up including: Barney's Bargain Home Store in Little Current,³⁸⁹ Dollarama and Mark's Work Warehouse in Timmins,³⁹⁰ and a Freshmart grocery store in Smooth Rock Falls.³⁹¹

Following the sharp declines of 2016 in the forestry, fishing, mining, quarrying, oil and gas, 2017 brought some balance to this sector. Forestry has been steadily declining and will be the focus going forward given the impacts of the continuing softwood lumber trade dispute with the U.S. Mining activities in northern Ontario have been affected by an industry-wide downturn as companies cope with a slump in base metal prices. Threats of import tariffs on steel and aluminum by United States only add more pressure to an already frail industry. A number of mines shut down in 2017 including: Vale Canada Ltd. closing its Stobie Mine north of Sudbury affecting 230 workers,³⁹² Porcupine Gold Mines closing the Dome underground mine in Timmins affecting 140 employees and contractors,³⁹³ and Great Lakes Graphite Inc. moving its graphite processing operation from the Matheson Mill near Timmins to its partner locations in United States. Some of the losses were offset by investments such as an \$8M commitment by Wesdome Gold Mines Ltd. in drill exploration at its Moss Lake property and Eagle River Complex,³⁹⁴ and the expansion of the Gowest Gold Ltd.'s Bradshaw Gold Project north of Timmins where at least 40 jobs were created.

Improvement across the board in the Northwest region

In 2017, labour market conditions strengthened considerably in the Northwest economic region. Employment increased by 2,800, its second consecutive increase, with both full- and part-time employment experiencing growth over the last year. Gains in full-time employment far outpaced part-time employment, adding 2,200 jobs to the economy. The unemployment rate saw significant improvement compared to last year, decreasing 1.4 percentage points to 5.5%. In 2016, the region had the second highest unemployment rate, and is now the fourth lowest in Ontario, suggesting a strengthening in the labour market. Although both participation and employment rates have improved for two consecutive years now, they are still somewhat low relative to the rest of the province.³⁹⁵

Growth in the goods-producing sector was led by the forestry, fishing, mining quarrying, oil and gas, and manufacturing industries.³⁹⁶ In 2017, various mining projects ramped up contributing to gains in employment, including the New Gold Inc.'s Rainy River mine³⁹⁷ and Wesdome Gold Mine Ltd.'s Moss Lake project.³⁹⁸ The manufacturing industry was revitalized with the addition of new production facilities and expansions throughout the region. Heddle Marine Service Inc. and Fabmar Metals Inc. announced plans to re-open the shipyard in Thunder Bay,³⁹⁹ and Buchanan Forest Products Ltd. announced it would re-open the Nakina sawmill in Greenstone.⁴⁰⁰ Although employment in construction did decline,⁴⁰¹ the value of residential and non-residential building permits increased 14.9% in 2017.⁴⁰² In addition, a number of large infrastructure projects began in 2017 and will continue through 2018. For example, the Wataynikaneyap Power LP project,⁴⁰³ the Technology, Education and Collaboration Hub at Confederation College,⁴⁰⁴ and the new cardiovascular surgery facility in Thunder Bay⁴⁰⁵ will continue to support the industry well into 2018.

In 2017, the number of jobs in the services-producing sector increased, mostly due to growth in health care and social assistance, as well as transportation and warehousing.⁴⁰⁶ The addition of a Canadian Cannabis Clinics⁴⁰⁷ and a residential treatment and medically-supervised detoxification facility⁴⁰⁸ helped boost employment in healthcare and social assistance. Several airlines, including Bearskin Airlines⁴⁰⁹ and Wasaya Airlines,⁴¹⁰ announced the implementation of daily flights in the region, contributing to employment in transportation and warehousing. In terms of job losses, the finance, insurance, real estate, rental and leasing

industry fared the worst, losing 1,100 workers.⁴¹¹ Several branch closures were announced in the Northwest,^{412,413} contributing to this drop in employment in 2017.

Infrastructure developments are the main driver of economic activity in northwestern Ontario. The federal and provincial governments continue to rollout projects to develop the economy and advance opportunities in the region. These projects include improvements to basic services such as water, electricity, roads, and broadband communication. This will raise the demand for skilled workers and test the region's labour supply and its ability to build capacity to fill employment gaps.

Some of the main factors that hinder the labour supply in this region include outmigration of youth, an older population, low levels of immigration and a shift away from rural areas to urban areas. These factors limit the available labour pool in remote areas where many infrastructure projects are planned. Indigenous communities are particularly affected in this regard. As smaller proportions of Indigenous people live on the reserves where some of these projects are being undertaken, labour supply may not be able to meet demand. In addition, many core support systems and basic needs are absent within a number of First Nation reserves which can prevent labour market participation.

Table 4: Annual Labour Force Statistics in Ontario, Employment by Economic Region

Employment ('000) Seasonally Unadjusted Data	Year			2016 to 2017		2015 to 2016	
	2017	2016	2015	Number	%	Number	%
Ontario	7,128.0	6,999.6	6,923.2	128.4	1.8	76.4	1.1
Economic Regions							
Ottawa	695.3	692.4	688.2	2.9	0.4	4.2	0.6
Kingston - Pembroke	208.1	212.5	201.0	-4.4	-2.1	11.5	5.7
Muskoka - Kawarthas	181.4	170.6	167.8	10.8	6.3	2.8	1.7
Toronto	3,442.9	3,373.2	3,320.4	69.7	2.1	52.8	1.6
Kitchener - Waterloo - Barrie	723.7	706.0	710.6	17.7	2.5	-4.6	-0.6
Hamilton - Niagara Peninsula	750.1	721.4	719.1	28.7	4.0	2.3	0.3
London	330.1	330.9	330.4	-0.8	-0.2	0.5	0.2
Windsor - Sarnia	299.3	299.4	295.1	-0.1	0.0	4.3	1.5
Stratford - Bruce Peninsula	149.0	145.5	145.0	3.5	2.4	0.5	0.3
Northeast	245.5	247.8	248.1	-2.3	-0.9	-0.3	-0.1
Northwest	102.7	99.9	97.4	2.8	2.8	2.5	2.6

Note: Totals may not add due to rounding.

Source: Statistics Canada's Labour Force Survey - CANSIM Table 282-0123

Interprovincial in-migrants higher than out-migrants in Ontario

Ontario continued to welcome more in-migrants coming from other provinces than out-migrants leaving the province. In the first three quarters of 2017, Ontario gained approximately 18,000 net residents from other provinces. This migration pattern largely reflects the trend of diverging economies across Canada, as Ontario was one of the growth leaders in the country in much of 2017. In contrast, the number of job vacancies remained at lower levels in oil-producing provinces, especially Alberta, due to the sustained weakness in oil prices.⁴¹⁴ This has resulted in an outflow of interprovincial migrants, some of whom have relocated to Ontario. Looking forward, net interprovincial migration should remain positive thanks to Ontario's position as one of the country's economic engines.

Labour Market Outcomes for Client Segments

Indigenous population continues to grow quickly

Ontario has the largest Indigenous population in Canada. In 2016, 374,395⁴¹⁵ people self-identified as Indigenous in the province, which accounts for about 22.4% of the Indigenous population nationwide.⁴¹⁶ The majority of Indigenous peoples identified as First Nations, followed by Métis and Inuit. Ontario has the largest First Nations and Métis populations in Canada. This marked the first time that Ontario was home to the largest Métis population in the country. Indigenous peoples now account for 2.8% of the provincial population compared to 2.0% in 2006.⁴¹⁷

The Indigenous population increased by 54.1% between 2006 and 2016,⁴¹⁸ which was more than five times faster than the growth rate of the non-Indigenous population over this 10-year span in Ontario. Indigenous peoples are much younger as well with a higher share of children and youth and fewer seniors. The Toronto, Ottawa-Gatineau, and Greater Sudbury CMAs, have the largest Indigenous populations though several urban centres in northern Ontario have a much higher share of Indigenous peoples. Overall, 34.3% of the total Indigenous population in the province lives in northern Ontario.

Although the on reserve Indigenous population grew to 54,425 in 2016, the total share of Indigenous peoples that live on reserve continues to fall. Housing remains a major concern for the on reserve Indigenous population. In 2016, 41.5% of the Indigenous population that lived on reserve lived in dwellings that were in need of major repairs and close to 30.0% of Indigenous peoples on reserve lived in unsuitable, crowded housing.

While educational outcomes have improved for Indigenous peoples over the past decade, they still lag behind those of the non-Indigenous population. In 2016, 29.1% of Indigenous peoples aged 15 years and over did not have a certificate, diploma or degree compared to just 17.2% of the non-Indigenous population. This was more pronounced for Indigenous peoples on reserve. About 47.8% of the on reserve Indigenous population aged 15 years and over did not have a certificate, diploma or degree in 2016, which included a high share of youth aged 15 to 24 years. Lower educational levels may result from a variety of societal and economic factors such as geographic isolation, financial barriers, family obligations, lack of childcare, and poorer health.

Labour market conditions improved a bit for the off reserve Indigenous population but seemed to worsen for Indigenous peoples on reserve. Employment grew by 4.8% for Indigenous peoples that lived off reserve between 2016 and 2017.⁴¹⁹ A higher share of Indigenous peoples also participated in the labour market. However, the unemployment rate rose for the off reserve Indigenous population to 10.4% compared to 5.9% for the non-Indigenous population in 2017. Conditions remain far weaker for the on reserve Indigenous population with much lower participation rates as well as higher rates of unemployment. In 2016, the participation rate for Indigenous peoples on reserve was just 51.9% and only 33.7% for youth aged 15 to 24 years.⁴²⁰ The unemployment rate for the on reserve Indigenous population was 20.7% in 2016, and 36.3% for youth aged 15 to 24 years. Indigenous peoples had a lower median employment income compared to the non-Indigenous population and a higher share of Indigenous peoples that lived off reserve lived in low-income households.

There have been several investment announcements to help improve infrastructure and basic living conditions on First Nation communities. Construction started on a transmission line that will connect Pikangikum First Nation to the provincial power grid. Plans are also underway to connect up to 17 remote First Nation communities to the electrical grid by 2023. Work is in progress to eliminate long-term drinking water advisories on First Nation communities by March 2021. A joint investment from the federal and provincial governments

will deliver high-speed internet service to five remote Indigenous communities in northern Ontario. Further, there are investments to improve housing conditions and reduce overcrowding through the First Nation Infrastructure Fund.⁴²¹

Ontario increases immigration target for 2018

Immigrants remain an important source of population and labour force growth in the province. Ontario continues to attract the largest proportion of newcomers arriving to Canada.⁴²² In 2016, 39% of all new immigrants chose Ontario as their new home,⁴²³ with the majority settling within the Toronto economic region.⁴²⁴ However, over the past few years, the number of immigrants arriving to Ontario has been declining in favour of western Canada where economic prospects were better.⁴²⁵

Typically, new immigrants to Ontario (those who arrived within the past five years of the survey date) have higher unemployment rates compared with the overall working-age population in Ontario. According to the 2016 Census, the unemployment rate for new immigrants was 12.7% compared with 7.4% for Ontario's working-age population.⁴²⁶ As immigrants spend longer periods in Canada, their labour market outcomes tend to converge with those of the general population. Immigrants who have been established in the province for more than 10 years had an unemployment rate lower than those born in Canada, suggesting improved labour market outcomes for immigrants over time.

For 2018, the Government of Canada set 310,000 as the target for permanent resident admissions.⁴²⁷ The majority of those admitted will be economic immigrants (177,500), increasing by 2.9% from the 2016 target.

In 2018, Canada expects to welcome 43,000 refugees and protected persons in total, down from the 2016 target of 40,000.⁴²⁸

Youth (aged 15-29) flocking to Ontario

Labour market conditions have changed for youth (ages 15 to 29) in 2017. The number of youth in the Ontario labour force saw an increase of 19,700, while employment increased by 34,200. Youth employment increased, in both full-time (+13,800) and part-time work (+20,300), while their average unemployment rate fell to 11.3% in 2017 from 12.5% in 2016.⁴²⁹

Historically, the younger age cohorts tend to have higher unemployment rates than the 25-29 age group, which trends closer to the overall unemployment rate in Ontario.⁴³⁰ For instance, the unemployment rate for youth aged 15 to 19 averaged 16.2% in 2017, a 2.3 percentage point decrease compared with 2016. In comparison, in 2017 the average unemployment rate for the other two youth cohorts, aged 20 to 24 and 25 to 29, were 10.2% and 7.5% respectively.

Between 2010/2011 and 2014/2015, Ontario had the highest net youth interprovincial migration deficit in the country. However, in 2015/2016 and 2016/2017, this trend was reversed with a positive net migration of 2,836 and 8,701 youth entering the province respectively.⁴³¹ As oil (and other commodity prices) declined impacting oil-related industries in other provinces and a weakening CAD positively impacted manufacturing-related industries. As such, Ontario has started seeing an influx of people from other provinces; particularly youth. While this suggests strength in the Ontario labour market relative to other provinces, it is more a result of the oil industry decline arising from lower oil prices impacting Western Canada economies. This reverses a trend of Ontario's negative net migration since 2003/2004 for youth when oil prices and oil production in Western Canada was booming.

Historically, the number of young people entering the labour market has outpaced the number of people approaching or entering retirement.⁴³² However, as Ontario's senior population continues to grow at a

relatively fast rate, it is projected that the number of youth entering the provincial labour market will no longer outpace the number of people leaving it each year.

Ontario's labour replacement index (LRI),⁴³³ a calculation used to estimate whether the number of people entering the labour market is large enough to replace the number of people expected to leave it, has been steadily declining. In 2017, this index for Ontario was 105.1, indicating that the number of people entering the labour market slightly outnumbered the number of people expected to leave. This index was 108.3 in 2013. The Ontario LRI figure remains above the national figure of 99.9.

As we approach 2020, Ontario's LRI is projected to fall below 100 for the first time. When the baby boomer generation in Ontario leaves the labour force in large numbers, the effects of a relatively smaller youth cohort will be felt in both the labour force and the economy. As a result, Ontario may find itself increasingly dependent on immigration and other forms of population growth to address labour market gaps resulting from a smaller labour pool.

Adding to job vacancies in the province, the future of Ontario employment should not be particularly focused on job-specific skills but more on skills that can transcend sectors and different jobs. For instance: (i) *Automation*, or the use of equipment to automate a job duty, depends on knowledge-based skills that are particularly taking hold in the manufacturing sector;^{434,435} (ii) Certain service sectors, like banking and retail, are becoming increasingly digital and online and workers will need to understand how to conduct business in an increasingly digital environment; (iii) Skilled Trades – While there is a clear shift towards knowledge-based occupations, there are also skilled trades which are relevant regardless of employment trends. These jobs generally require college, trade school, or apprenticeship training; and perhaps most importantly; (iv) the *soft skills* which employers indicate are lacking from the current supply of labour, such as work ethic, teamwork and oral communication skills.⁴³⁶

What all of this has led to in the province is the understanding that students who participate in work placements are more likely to benefit from higher earnings, more employment and more full-time employment; Be employed in fields more closely related to their studies and; Develop technical and work-ready skills (for example, strategic thinking, problem solving and teamwork) sought after by employers.⁴³⁷

Older workers (aged 55 to 64) increased their presence in the labour market in 2017

In Ontario, older workers aged 55 to 64 have been a growing segment of the labour force. In 2017, this age group represented 16.7% of workers and job seekers, up from 16.5% a year earlier. The effect of the baby boom surge on the 55 to 64 year-old population is expected to peak over the next five to six years, when their labour force share may reach its maximum. Older workers aged 55 to 64 years experienced the largest employment growth among workers under the age of 65 in Ontario, with gains of 35,300 (+4.9%) in 2017.⁴³⁸

Workforce participation among older workers saw a very small decline (-0.3%) owing to decline in participation rate of males from 71.5% in 2016 to 70.4% in 2017. Participation of the older female workers increased during the same period.⁴³⁹ Female labour force participation is increasing at a faster rate than males, with females posting a 4.7 percentage point increase in labour force participation over the last decade compared to the 2.1 percentage point increase among their male counterparts.⁴⁴⁰ These trends in workforce participation coincide with an increase in the median age of retirement in Ontario for both males and females with an upward change becoming more evident following the 2008/09 recession. In fact, the median age of retirement in the province increased significantly from 61.3 years in 2009 to 64.4 years in 2017.

This increasing workforce participation can be attributed to recent trends of delayed retirement⁴⁴¹ and re-employment⁴⁴² among older workers which in turn are based on multiple factors. These include: (i) *Labour*

market factors such as precarious economic conditions (e.g. lay-offs, cut-backs, job availability, lower wages) and employment in particular regions, occupations, and sectors; (ii) *Changes in legislation* such as recent changes in the CPP, adjustments to rules of the Income Tax Act relating to registered pension plans, and the elimination of mandatory retirement; (iii) *Financial factors* such as financial readiness (e.g. outstanding mortgage, debt, savings) and coverage by a registered pension plan; (iv) *Socio-demographic factors* such as age, sex, education, income, and immigrant status; (v) *Domestic factors* such as presence of a spouse and their earnings, presence of children, and caregiving within and outside the family; (vi) *HR related issues* such as lack of practices supporting older worker retention and retraining options, as well as flexibility in working arrangements; (vii) *Work related issues* such as job stability, job strain, job mobility, physical demands, job satisfaction, and supervisory support; (viii) *Health related factors* such as health status, activity limitations, health shocks, and health behaviours (smoking, drinking, obesity); (ix) *Training* including level of participation in training, availability of developmental opportunities, and access to training that suits older workers; and (x) *Motivation related factors* such as opportunities for professional development, satisfaction with work environment, satisfaction with work-life balance and life satisfaction post-retirement.^{443,444,445}

Compared to younger age groups, older workers tend to have lower unemployment rates. However they tend to be unemployed for longer periods of time.⁴⁴⁶ Among persons out of work in 2017, approximately 13.2% of the older workers were unemployed for 53 weeks or more, compared to just 6.2% across the entire working age population (15+). Longer durations of unemployment among older workers could be attributed to relatively lower levels of educational attainment,⁴⁴⁷ age discrimination,⁴⁴⁸ and high unemployment rates in the area of residence. It is also possible that older workers are more selective in their job search than the younger age groups particularly in relation to finding jobs with similar compensation.⁴⁴⁹ These factors may reduce re-employment opportunities for unemployed older workers and may even force some into early retirement. Older workers may also have more savings, as well as more hours accumulated for Employment Insurance (EI) benefits, allowing them to stay unemployed for a longer period.

Older workers tend to be over-represented in part-time work, compared to younger age groups, and their share in part-time work has been increasing over time. In 2017, this age group represented 14.9% of those employed part-time, up from 13.2% a decade earlier.⁴⁵⁰ This growth can be potentially attributed to the relatively limited number of full-time and well-paying jobs available, particularly for older workers,⁴⁵¹ personal preferences related to delayed retirement or re-entry into the workforce post-retirement, and financial insecurity.⁴⁵²

Seniors aged 65 and over participating in the labour force more than ever

There were 2.3 million seniors aged 65 and over in Ontario, according to Statistics Canada's 2016 Census of Population. The senior population continues to account for a growing share of Ontario's population, as the number of seniors in the province accounts for 16.7% of Ontario's total population, up from 14.6% in 2011 and 13.6% in 2006. It is estimated that the population of seniors in Ontario will nearly double to approximately 4 million by 2036.⁴⁵³ As such, the proportion of seniors is projected to increase to 24.5% of the Ontario population by 2036.

The proportion of seniors who are participating in the labour force as part of the workforce or actively seeking jobs has increased significantly over the past decade, strengthened by the impact of the 2008/09 recession. In 2017, the labour force participation rate of seniors was 14.8% in Ontario, an increase of 0.4% over the previous year, and the highest rate ever recorded in the Labour Force Survey. The participation rate of 14.8% in Ontario was higher than the national average of 14.2% in Canada, while the provincial senior unemployment rate of 4.0% was the second lowest across Canada. The participation rate for seniors in Ontario had been growing

gradually, but gained greater momentum after 2007, as the rate jumped up by 5 percentage points between 2007 and 2014.

Seniors were far more likely to work part-time compared to the general population, though, as 40.7% of seniors who were employed worked part-time in 2017, compared to 18.9% of the general Ontario workforce. Seniors have a significantly larger proportion of workers in agriculture, forestry, fishing and hunting; real estate and rental and leasing; and professional, scientific and technical services, according to the 2016 Census.⁴⁵⁴ In contrast, seniors are significantly under-represented in accommodation and food services; utilities; and mining, quarrying, and oil and gas extraction.

Francophones

Geographic Distribution – Ottawa accounts for the leading share of Francophones in Ontario

Ontario continues to comprise the largest Francophone population (7%) in Canada outside of Quebec. According to the 2016 Census, the number of people who identified French as their first official language spoken (FOLS) was 550,600,⁴⁵⁵ up 1.5% from the 542,390 in 2011.⁴⁵⁶ However the share of FOLS in the population in Ontario declined slightly over the intercensal period, from 4.2%, to 4.1% in 2016. As was the case in 2011, more women than men constituted the Francophone minority group in 2016 (53.1% and 46.9%, respectively).⁴⁵⁷

In 2016, the largest Francophone population was found in the Ottawa economic region which accounted for 234,985 or 43% of the province's official language minority population.⁴⁵⁸ This number represents a 3.5% increase in the number of Francophones in this region since 2011.⁴⁵⁹ The area is experiencing a rise in French speaking immigrants which is adding to the size of the community.⁴⁶⁰ The proportion of Francophones was highest in five areas in Ottawa, namely, Cumberland, Innes, Rideau–Rockcliffe, Rideau–Vanier and Orléans.⁴⁶¹

In other regions in Ontario, the Northeast (113,980),⁴⁶² particularly Sudbury,⁴⁶³ and Toronto (104,675)⁴⁶⁴ also have significant numbers of Francophones.

Investments, Public Sector Initiatives and Other Sources of Community Growth

There are some notable policy initiatives which are fostering growth in the French Language community. Among them, is Ontario's immigration strategy which includes a segment targeting French-speaking newcomers and a 5% Francophone immigration target.⁴⁶⁵ Also, starting in June 2017, the federal government's Express Entry skilled-worker immigration program began awarding additional points to candidates with strong French Language skills.^{466,467} The Government of Canada also announced an additional investment of nearly \$500M over 5 years in support of official languages (English and French) minority communities across the country.⁴⁶⁸

In the educational sphere, the Government of Ontario is advancing a proposal to establish a stand-alone French-language university, which would be the first in the province.⁴⁶⁹ The plan is for the facility to be located in Toronto, and begin operating by September 2020 with an initial enrolment of 300 students. Annually, this number is expected to increase to more than 2,000 students on a full-time equivalent basis over a decade.^{470,471}

Meanwhile, the strong bilingual (English and French) presence in Ontario continues to attract business investments. For example over the past year, a few call centres have opened and ramped up operations in northeastern Ontario creating significant number of bilingual technical support positions. Individuals with bilingual skills are usually offered relatively higher wages.^{472,473}

SECTION 3: IMPLICATIONS FOR PROGRAM/SERVICE DELIVERY

Employment Insurance claims tick up in 2017/18

In Ontario, the number of Employment Insurance (EI) Initial and Renewal (I&R) claims has been 1.0% higher so far in 2017/18 compared to the same time frame in 2016/17. This is a relatively small year-over-year difference. In addition to the regular churn of the labour market, the Sears Canada closure possibly contributed to the increase in claims. Some workers may have also been affected by the increase in the Ontario minimum wage which took effect on January 1, 2018.

The preliminary forecast of I&R claims for the 2018/19 fiscal year is 884,000, which is a small increase over the forecast for 2017/18. Economic conditions for the upcoming year are expected to be relatively stable in Ontario, and the number of EI claims will likely follow the same trend, barring any unexpected significant layoff announcements.

Canada Pension Plan and Old Age Security programs will see more demand

In the 27th Actuarial Report on the Canada Pension Plan (CPP) released at the end of 2015, the Chief Actuary⁴⁷⁴ estimated that the number of CPP beneficiaries would more than double between 2016 and 2075. The increase in beneficiaries closely follows the rapidly aging population. Ontario's population of seniors aged 65 and over is projected to grow from 2.4M in 2017 to 4.1M by 2038.⁴⁷⁵ As a result, the volume of CPP and Old Age Security (OAS) claims will rise, placing more demand on Service Canada's processing and delivery network.

Compared with previous years, as seen in Table 5, the volume of new CPP retirement beneficiaries in 2012 increased sharply. This increase was partly due to changes to the CPP retirement program which allowed individuals aged 60 to 64 to continue working while receiving CPP retirement benefits. After the one-time policy change, the volume of new CPP retirement beneficiaries decreased to a comparatively lower level. Table 6 highlights trends in the number of new CPP disability (CPP-D) beneficiaries from 2008 to 2017.

Table 5: New CPP Retirement Beneficiaries

Year	Ontario		Canada	
	Number	Annual Change	Number	Annual Change
2008	125,500	4.2%	266,900	4.0%
2009	130,700	4.1%	276,300	3.5%
2010	129,100	-1.2%	278,800	0.9%
2011	131,400	1.8%	278,100	-0.3%
2012	169,300	28.8%	359,700	29.3%
2013	143,100	-15.5%	299,500	-16.7%
2014	141,500	-1.1%	302,400	1.0%
2015	148,300	4.8%	311,700	3.1%
2016	144,900	-2.3%	312,300	0.2%
2017	149,600	3.2%	319,000	2.1%

Table 6: New CPP Disability Beneficiaries

Year	Ontario		Canada	
	Number	Annual Change	Number	Annual Change
2008	16,000	1.6%	33,000	4.6%
2009	17,500	9.4%	35,400	7.3%
2010	18,100	3.4%	35,500	0.3%
2011	17,600	-2.8%	37,400	5.4%
2012	17,300	-1.7%	37,500	0.3%
2013	16,400	-5.2%	33,600	-10.4%
2014	16,500	0.6%	33,700	0.3%
2015	19,000	15.2%	38,600	14.5%
2016	17,900	-5.8%	36,300	-6.0%
2017	17,700	-1.1%	37,500	3.3%

Table 7 shows the annual change in new OAS beneficiaries between 2008 and 2017. In 2012 there was a substantial increase in the number of new beneficiaries in Ontario and Canada, most likely due to an increase in the eligible population (age 65). In 2013, the number of new beneficiaries in Ontario and Canada declined, possible due to a new option of deferring OAS pensions for 60 months in exchange for a higher monthly payment.⁴⁷⁶ There was another large increase in 2017, possibly due to the ramping up of Baby Boomers retiring; this coincides with the highest birth rate in Canadian history in the mid-1950s, and the effects of the deferral option first offered in 2013 to OAS recipients. In December 2017, Service Canada expanded the OAS automatic enrolment process to include the Guaranteed Income Supplement (GIS).

Table 7: New OAS Beneficiaries

Year	Ontario		Canada	
	Number	Annual Change	Number	Annual Change
2008	99,100	3.0%	281,700	3.7%
2009	102,500	3.4%	285,900	1.5%
2010	101,100	-1.4%	288,100	0.8%
2011	120,300	19.0%	331,700	15.1%
2012	133,300	10.8%	361,000	8.8%
2013	126,200	-5.3%	348,600	-3.4%
2014	121,700	-3.6%	344,800	-1.1%
2015	121,100	-0.5%	339,900	-1.4%
2016	127,000	4.9%	348,100	2.4%
2017	143,500	13.0%	387,200	11.2%

Grants and contributions will remain important for Ontario's key client groups

Employment of youth (aged 15 to 24) strengthened in 2017 with an increase of 24,100 (+2.6%), following two consecutive years of decline. In 2017, employment grew in both full-time and part-time positions. The participation rate was also up slightly and stood at 60.7% from 60.3% in 2016, and the unemployment rate fell by 1.7 percentage points to 12.3%.⁴⁷⁷

Retail trade, specifically grocery and clothing stores, and food services, largely restaurants, are the main employers of youth.⁴⁷⁸ Several of these types of retail operations have been experiencing a fair amount of instability, resulting in more precarious employment for youth. Government-supported programs will therefore remain important resources to improve the labour market outcomes for youth. For example, each year the Government of Canada invests over \$330M in the Youth Employment Strategy (YES), which includes Service Canada programs - Skills Link, Career Focus and Canada Summer Jobs. In the 2018 federal budget, an additional \$448.5M was announced for the YES program over 5 years starting in 2018-19.⁴⁷⁹ With specific reference to Canada Summer Jobs, this wage subsidy program has 5 national priorities including the hiring of youth from underrepresented groups, and support for job opportunities in the science, technology, engineering and mathematics (STEM), and information and communications and technology (ICT) fields, particularly for women.⁴⁸⁰ This focus on strengthening the future local workforce with STEM and ICT skills is of particular importance as the increasingly digital economic is creating high demand for occupations in these areas. Currently, in order to address local labour supply constraints in Canada in these fields, the Global Talent Stream (GTS) was launched under the federal government's Temporary Foreign Worker Program to fast track the entry of workers to fill positions in some computer and other occupations.⁴⁸¹

The spending on social programs under the Homelessness Partnering Strategy will also help to reduce some of the socio-economic barriers affecting youth engagement in the workforce, especially in urban centres.

The Indigenous community is another key client group in Ontario. Indigenous Peoples tend to have weaker labour market outcomes compared to the non-Indigenous population, however, there are indications of a recent improvement in the labour market conditions for the Indigenous population living off-reserve. In 2017, although the unemployment rate for the Indigenous Peoples edged up by 0.4 percentage points to 10.4%, and remains above the rate for the non-Indigenous population (5.9%), the current rate is still the second lowest recorded for the Indigenous population based on available data from the year 2007. In addition, employment increased by 4.8% to 135,000, and the participation rate rose slightly to 61.3% between 2016 and 2017.⁴⁸²

Additional budgetary commitments have been made to lift the standard of living of Indigenous peoples and on-reserve conditions in areas such as primary and secondary education, housing and health, and other infrastructure, and to enhance language and culture.^{483,484,485} For example, multi-million dollar funding commitments will be rolled out to upgrade the water treatment system in the Neskantaga First Nation community,⁴⁸⁶ as well as to build new homes and renovate existing structures in 17 First Nation communities in the Treaty #3 area of Northwestern Ontario.⁴⁸⁷ There are a few other energy-related developments in the community, notably, with Wataynikaneyap Power LP leading the \$1.6-billion provincial and federally supported infrastructure project to connect diesel-dependent First Nations communities to the provincial power grid.⁴⁸⁸ About 200 workers from 22 First Nation communities in the region will be hired through the Wataynikaneyap Transmission Project Training Program to support these activities.⁴⁸⁹ Similarly, more than 200 workers will be trained to support the East West Tie Transmission Project, a new power line connecting transformer stations near Thunder Bay and Wawa. This infrastructure will provide sufficient electricity to support increased mining operations in the region.⁴⁹⁰

In educational services, the federal government is partnering with Teach for Canada to help provide 158 youth from Thunder Bay and Toronto with opportunities to teach in elementary, middle or high schools in Indigenous communities in northern Ontario. The project will also provide the cultural supports for the placements.⁴⁹¹

Indigenous youth (15-30) are experiencing the fastest population growth nationally.⁴⁹² Canada's ageing workforce will create high replacement needs, and these measures which aim to boost Indigenous youth in careers in the skilled trades and technologies, bode well for the community and generally for Canada.⁴⁹³ Private-public sector partnerships will continue to play a key role, for example through investments in the

federal Indigenous Skills and Employment Training program which has replaced the Aboriginal Skills and Employment Training Strategy (ASETS) program.⁴⁹⁴ Further, in an effort to continue attracting more Indigenous workers to the federal public service, the Indigenous Student Employment Opportunity (ISEO) was launched in 2018 as a specific recruitment approach.⁴⁹⁵

Northern Ontario has a high concentration of mining operations and is also home to a large Indigenous population.⁴⁹⁶ The employment of Indigenous Peoples usually account for about 11.2% of the total mining jobs in Ontario.⁴⁹⁷ The sector is seeing some comeback^{498,499} as the prices of most base and precious metals are continuing to recover from the slump experienced a few years ago,⁵⁰⁰ and this should support job openings for these workers.

Meanwhile, the demand for senior-related programs and services, such as the New Horizons for Seniors Program, should continue to grow in line with the aging population. An older population may also increase the need for services for those with disabilities.

Job match service added to the temporary foreign worker program

The Temporary Foreign Worker Program (TFWP) added further requirements to strengthen local recruitment efforts. Employers that wish to fill a high-wage or low-wage position must advertise on Job Bank and use the Job Match service effective August 28, 2017.⁵⁰¹ Employers must contact all registered job seekers that match a certain degree of skills and requirements for the job advertisement within 30 days of posting. Higher-skilled positions have a higher suitability criterion than low-wage positions. In addition, employers must conduct at least two other recruitment methods. For high-wage positions, one of the methods must be national in scope and be accessible to all Canadians. For low-wage positions, each recruitment method must target a different underrepresented group such as Indigenous peoples, vulnerable youth, newcomers, and persons with disabilities. These measures help ensure that Canadians have first access to available jobs and promote labour market participation among underrepresented groups.

The TFWP also launched the Global Talent Stream (GTS) on June 12, 2017.⁵⁰² The program has two streams. The first stream intends to help innovative employers find unique and specialized foreign talent through one of the designated referral partners. The second stream intends to help companies fill in-demand highly skilled positions under the Global Talent Occupational List, which largely consists of computer and information technology-related occupations.

Lastly, an exemption to the processing fee came into effect on December 8, 2017.⁵⁰³ Applicants that wish to hire a foreign caregiver to provide home care medical assistance are exempt from the processing fee. Further, applicants that would like to hire a foreign caregiver to provide in-home childcare to a child less than 13 years of age are exempt from the fee if they have a gross annual income of \$150,000 or less.

The number of requested temporary foreign worker positions fell by 9.1% in Ontario between 2015 and 2016.⁵⁰⁴ At the same time, the number of approved positions decreased by 9.3%. The Windsor–Sarnia, Hamilton–Niagara Peninsula, and Toronto economic regions had the highest number of approved positions in 2016 and together accounted for 80.4% of the provincial total.

In 2016, about 73.2% of all positions approved under the TFWP in Ontario are related to primary agriculture. Three of the most common occupations include general farm workers, nursery and greenhouse workers, and harvesting labourers. Agricultural regions in the province such as Hamilton–Niagara, Windsor–Sarnia, and London have a large intake of these workers each year. In particular, Leamington, Norfolk, St. Catharines–

Niagara, Chatham–Kent, and Brantford are some of the key locations for temporary foreign workers in the province.

The number of approved positions for caregivers rose sharply in Ontario in 2016. Most of the increase was for babysitters, nannies and parents' helpers and visiting homemakers, housekeepers and related occupations.

Added recruitment requirements and the Job Match service may result in fewer approved positions for low-wage positions and possibly some high-wage jobs as employers are able to connect with local job seekers. Tighter recruitment requirements and compliance could also influence the number of applications received. Meanwhile, the GTS may lead to an increase in positions related to computer and information technology to support the growing technology base in the province.

Focus on service transformation in 2018

Ministerial mandate letters and Budgets 2016 and 2017 confirmed the Government of Canada's emphasis on improving service delivery to Canadians. ESDC has taken a leadership role and is taking action to meet the needs of Canadians. Aligned with the Government of Canada Service Strategy, the ESDC Service Strategy is a departmental modernization plan that will allow us to offer a higher standard of service delivery. The strategy is guided by five core principles:

- Client-centric
- Digital
- Collaboration
- Efficiency and effectiveness
- Service excellence

The ESDC Service Strategy has the following goals and key initiatives:

- Clients can complete all services using digital self-service
- Clients can access bundled and connected services seamlessly across channels
- Clients receive high-quality, timely, and accurate services
- Clients' needs are anticipated
- ESDC is organized to efficiently and cost-effectively deliver on the Strategy

ESDC developed the Service Transformation Plan in 2017 as a roadmap to improve service delivery to Canadians. The Plan consists of short-, medium-, and long-term opportunities to enhance the service experience for clients, employers, communities and organizations.

The Service Transformation Plan is organized by Epics. Epics are groupings of 35 activities or solutions under themes directly linked to citizens' service expectations. There are five Epics:

- Allow Me - Allow citizens and clients to access their services and benefits more quickly and efficiently
- Trust Me - Enable clients to apply for benefits and services more quickly by leveraging known data about the client.
- Tell Me - Provide more information to citizens about benefits and services and have multiple methods of effectively communicating with Canadians.
- Hear Me, Show Me - Increase the ability for clients to provide feedback and answer their questions.
- My Choice - Provide multiple options for clients to engage with ESDC; provide clients with a choice in how they interact with ESDC and receive their benefits and services.

CONCLUSION

In 2017, Ontario's large population and well-diversified economy are expected to help the province lead the country's economic growth. The economy is forecast to strengthen as the U.S. economy looks to improve. The manufacturing industry is expected to benefit from the improvements south of the border, and a weaker CAD, although an uptick in oil prices may moderate growth. Investments in infrastructure are also expected to have a positive influence on Ontario's economy and labour market. Finally, the Ontario outlook is dependent on business investment picking up the slack expected from a tapped out consumer. However, the health of the real estate market, potential shifts to Canada-U.S. trade relationship and global geopolitical climate are risks to the 2017 outlook. That being said, the outlook remains cautiously optimistic as improving economic growth should create more opportunities in Ontario's labour market going forward.

Note: In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.

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