

Post-Pandemic Scenario Planning Report 2021



durham
workforce
authority

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Executive Summary

The COVID-19 pandemic has disrupted social and economic activity on a global, national and local scale. Across Ontario, businesses have been navigating extensive lockdown periods while pivoting business models for short-term survival along with long-term resilience and growth. The uncertainty surrounding how long the pandemic will last and how long public health measures will remain in place has made it difficult for employers to strategically plan in the long-term.

The Durham Workforce Authority's Post-Pandemic Scenario Planning Report aims to help local businesses plan for unforeseen and foreseeable events regarding the plausible future of the local labour market, through the COVID-19 pandemic and beyond. Scenario-based planning helps establish a specific set of uncertainties to guide the local labour market in the long-term. It supports workforce leaders to make effective resource and investment choices, anticipate required supports, consider how future conditions will affect their business, establish alternative responses, and develop skills gap closing strategies. To help business leaders plan effectively, the report leveraged data from various sources including Statistics Canada, job demand reports, surveys, Sector Planning Partnership Grant (SPPG) research, and community consultations with economic development partners.

The Durham Region has been experiencing unprecedented unemployment levels as lockdown restrictions have reduced economic activity and employment in various industries. Small businesses in the Region have been hit particularly hard by the pandemic, as employers have been forced to shut down or scale back operations, shift to virtual platforms, and re-think how to recruit, retain, and train staff. More than a year into the pandemic, COVID-19 continues to disrupt the operations of local businesses, which has greatly impacted the local labour force. The critical uncertainties established in the report reflect the business community's top concerns, including mitigating the financial impacts of the pandemic and recruiting talent to fill in-demand positions.

This report integrates current regional, provincial, and federal COVID-19 efforts and strategies that can be used to support the local business community and the local labour force. Community consultations with economic development partners helped shape the scenarios as well as the recommendations for businesses, organizations, and educational institutions to implement to mitigate the effects of COVID-19 and build resiliency. The recommendations provide guidance on investment opportunities, government funding, support programs, strategies to reduce economic costs, and opportunities for collaborative partnerships between local stakeholders.

The Durham Workforce Authority remains committed to supporting workforce planning and development, as it has undertaken several projects during 2020-2021. It has also developed various resources to support businesses and jobseekers, such as the 'Life After Covid' initiative, which connects people with the resources and information they need to successfully re-enter the labour force. By working collaboratively with community partners, the Durham Workforce Authority will continue to develop projects that support the stability and long-term success of Durham Region's workforce.

Introduction

Scenario-based planning is a collaborative systems and design-thinking framework that helps organizations and businesses make strategic plans by identifying and managing the possible outcomes of a set of future scenarios affecting a focal issue (Workforce WindsorEssex, 2021). Scenario planning stands out for its ability to capture a wide range of possibilities in rich detail. By identifying trends and uncertainties, it can be used to construct a series of scenarios that will help long-term decision-making (Schoemaker, 1995). Applying this framework in workforce planning in Durham Region will help equip employers with the tools they need to develop and implement proactive measures to address potential labour market scenarios.

The purpose of the report was to examine the effects of the pandemic on local priority sectors, including Agriculture, Advanced Manufacturing, Construction, Healthcare, and Logistics. The main goal was to develop a scenario matrix to construct and describe potential scenarios for business recovery in Durham Region in the unpredictable situation of COVID-19. The scenario matrix helps visualize possible scenarios based on critical uncertainties. The scenario matrix and critical uncertainties were developed in collaboration with economic development partners. Recommendations for businesses adapting scenario planning are based on the four scenarios as well as feedback from community consultations.

This project marks an important opportunity for the Durham Workforce Authority to use local labour market research to support economic growth and workforce recovery in the Region. The Durham Workforce Authority works hard to convene the voices of different sectors, identify trends, and collaborate with community stakeholders to continue local labour market planning, research, and innovation. The DWA is excited about the prospects for Durham Region's future and is committed to providing responsive workforce solutions that allow businesses, organizations, and community stakeholders to implement successful long-term strategic planning.

Project Overview

This project helps initiate a conversation around the next steps and actions that are required to address present and future labour market impacts of the COVID-19 pandemic in the Durham Region. First, the report provides an overview of the past to establish the historical context.

Next, it provides a summary of the present situation regarding current and anticipated impacts of COVID-19 on local sectors and the workforce. This section includes information about the impacts of COVID-19 on different groups of workers, as well as initiatives, projects, and actions that are being explored to alleviate the effects of the pandemic in the Region.

Following, the project provides an overview of the future as it details four possible scenarios for post-pandemic recovery. Lastly, the report provides recommendations to help solve workforce challenges induced by COVID-19, to sustain local business, and to engage employers to support the growth of Durham's leading industries.

Methodology

The Durham Workforce Authority's Post-Pandemic Scenario Planning Report was created by collecting and analyzing an amalgam of sources, including data and information from Statistics Canada, job demand reports, surveys, Sector Planning Partnership Grant (SPPG) research, and community consultations. The community consultations were held with economic development partners during July and August of 2021 to gain feedback about COVID-19 recovery for business in Durham Region. Participants included the Clarington Board of Trade, Economic Development Whitby, Economic Development Oshawa, and Invest Durham (Durham Region Economic Development and Tourism). The insights shared by economic development partners helped to establish and guide the report's critical uncertainties, indicators for recovery, plausible scenarios for the future of the local labour market, and recommendations for businesses adopting scenario planning.

The report also utilized a scenario-based planning framework to develop strategic plans in uncertain situations. Scenario planning helps develop strategic plans when projecting changes in the workforce or business community. By combining scenario-based planning with labour market information and consultations with economic development partners, the Durham Workforce Authority generated four potential scenarios for workforce recovery from COVID-19 in Durham Region.

It is important to note that this report incorporates labour force survey data from Statistics Canada on the Oshawa Census Metropolitan Area (CMA), which includes Clarington, Whitby, and Oshawa. The Oshawa CMA is used as a data proxy in Durham Region, as Pickering, Ajax and Uxbridge are part of the Toronto CMA and Brock and Scugog are not surveyed in the monthly report due to population size. The Oshawa CMA includes the most Durham Region residents and provides the best depiction of the labour market in the Region as a whole.

The Durham Workforce Authority would like to acknowledge that the Workforce WindsorEssex's Post-Pandemic Scenario Planning Report inspired this project. This project leveraged the report to develop a similar report locally. We thank the Workforce WindsorEssex for sparking the creation of a Post-Pandemic Scenario Planning Report for the Durham Region.

Scenario-Based Planning Steps

- 1. Identify indicators for recovery**
- 2. Identify critical uncertainties**
- 3. Develop and construct a scenario matrix**
- 4. Create recommendations for businesses adopting scenario planning**
- 5. Track scenario indicators and adapt plans for the future**

The next step in developing strategic plans involves identifying indicators for business recovery and the critical uncertainties facing the Region. The indicators and critical uncertainties will help construct the plausible scenarios within the scenario matrix. Next, it is necessary to identify scenario-based recommendations for actions and measures that businesses can implement to overcome the workforce challenges of COVID-19 and to seize opportunities that each scenario could offer businesses in Durham Region.

Recovery Stages

Economic recovery for sectors and businesses can be divided into four stages: **react**, **restart**, **recover**, and **resiliency**.

React refers to adjusting to lockdown restrictions, accessing solutions, and implementing short-term actions to maintain business activity.

Restart signifies adjusting to new, more stable conditions that allow a particular level of business activity, while relying on temporary solutions and preparing for threats and uncertainties, including renewed lockdown measures.

Recover denotes a new steady state, or a new normal, in which businesses and priority sectors reach a sustainable level to continue operating. Depending on the sector, recover may signify returning to pre-COVID-19 levels of activity. Employers and industry leaders may continue to cope with the impacts of economic decline in other sectors or the overall local economy.

Resiliency means that businesses, sectors, and organizations benefit from investments and long-term strategies implemented during the recovery phase. During this phase, businesses will become resistant to negative impacts related to COVID-19 and will be able to foster growth beyond the COVID-19 pandemic.

How To Use This Data

The report provides community stakeholders with the tools they need to strategically plan for the future of the local labour market. This report helps support employers, employees, job seekers, industry leaders, economic development organizations, educators, and community partners to implement effective decisions pertaining to workforce recruitment, retention, training, and career pathways.

Questions were designed to help stakeholders and business leaders understand how to use this data. For each of the four scenarios, discuss how your business would be impacted if the scenario transpired. Consider how your business would navigate the current and future skills shortages. Think about how your organization would deal with increased demand for certain positions amid a lack of qualified candidates. Plan how your business would navigate the stages of react, restart, recover, and resiliency.

Questions to consider include:

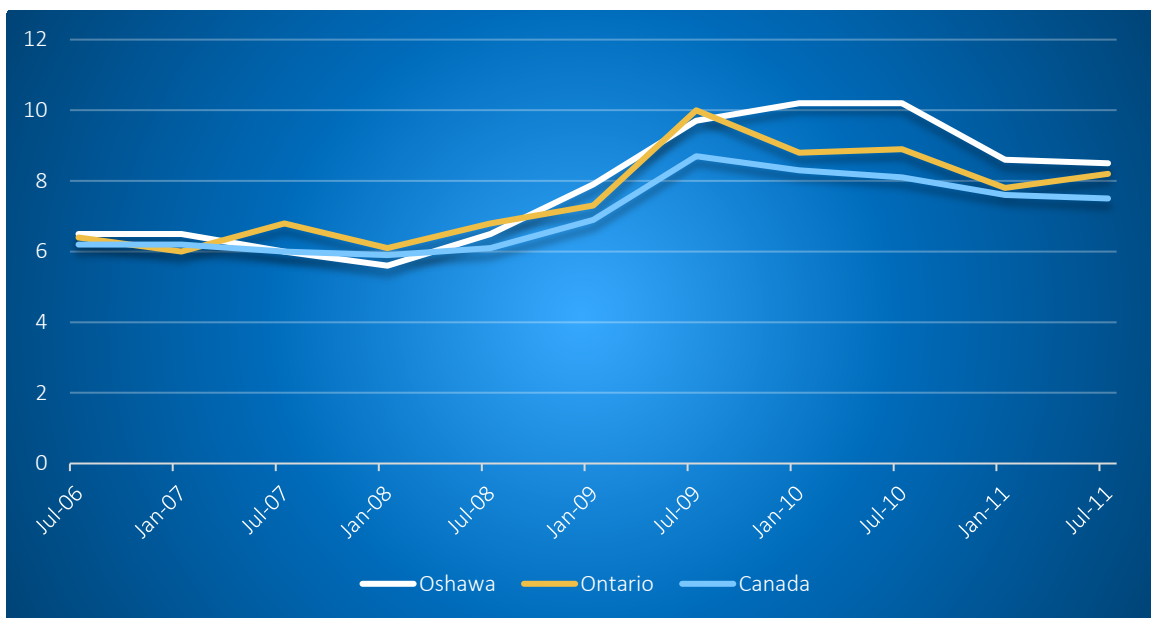
1. What stage is your business is currently in?
2. What federal, provincial, or regional supports, initiatives, or programs does your business need?
3. What are the main challenges your business is currently facing?
4. How would your business navigate each scenario?
5. What are the emerging opportunities for your business?
6. Which specific recommendations will be the most helpful for your business?

Part II: The Past, The Present, and The Future

The Past: The Historical Context

Historically, Durham Region has experienced unemployment rates that are comparable to federal and provincial levels. The 2008 Financial Crisis and the decline of the American car industry greatly impacted Oshawa's General Motors (GM) plant and its Canadian Auto Workers, decreasing economic activity and increasing unemployment in the Region. The Durham Workforce Authority estimated that as many as 8,000 auto jobs have been lost in Durham since 2007 as factories closed their doors and were no longer supplying GM (Social Capital Partners, 2019). From food processing plants to cell phone production lines, manufacturing jobs were significantly impacted in all areas of the industry and in all regions across the province (Tiessen, 2014, p.9). As a result, the Region's unemployment rate rose from 6.5% in July 2006 to 10.2% in July 2010, a sharp increase of 3.7% (Statistics Canada, 2021). Figure 1 provides regional, provincial, and national unemployment rates to illustrate the unemployment trend from 2006 to 2011.

Figure 1: Regional, Provincial, and National Unemployment Rates, July 2006-July 2011

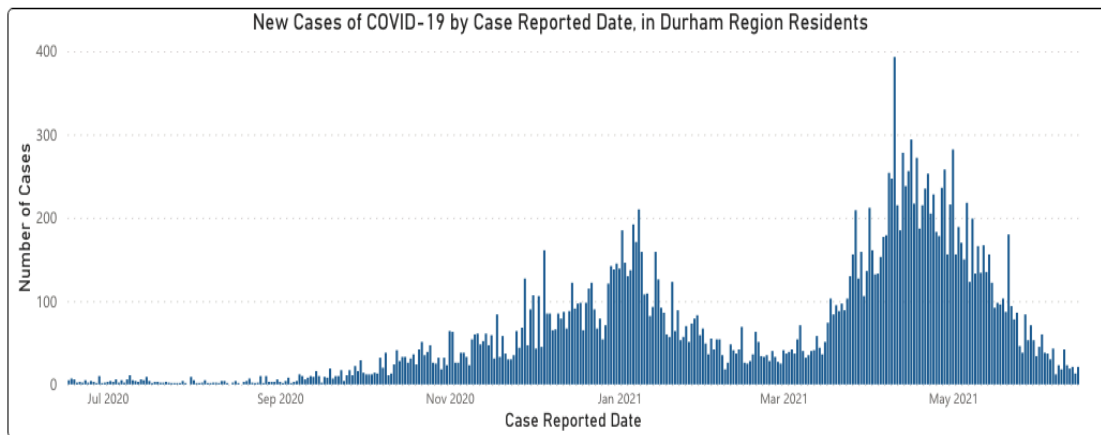


Source: Statistics Canada, Table 14-10-0378-01 Labour Force Characteristics, three-month moving average, unadjusted for seasonality

The Present

Durham Region has been experiencing high rates of unemployment over the past 17 months due to emergency public health measures and lockdown restrictions enacted to curb community transmission of COVID-19. The March 2020 Labour Force Survey showed stark early indications of a need for rapid intervention as COVID-19 case numbers began to climb along with the Region’s unemployment rate. The rise of quick-spreading variants in January 2021 and the subsequent increase in COVID-19 cases led the provincial government to declare a second emergency stay-at-home order. By April 2021, a third wave of COVID-19 emerged, causing the province to once again enter a lockdown with multiple public health restrictions. The second and third waves have continued to negatively impact employment in Durham Region with unemployment rates increasing to 8.1% in January 2021 and 8.3% in May 2021 (Statistics Canada, Labour Force, 2021). Figure 2 indicates the number of new COVID-19 cases in Durham Region from July 2020 to May 2021. This graph was created by Durham Region’s Health Department and is intended to be used to cross-reference sector supply and demand with cases in the Region.

Figure 2: New Cases of COVID-19 by Case Reported Date, in Durham Region Residents



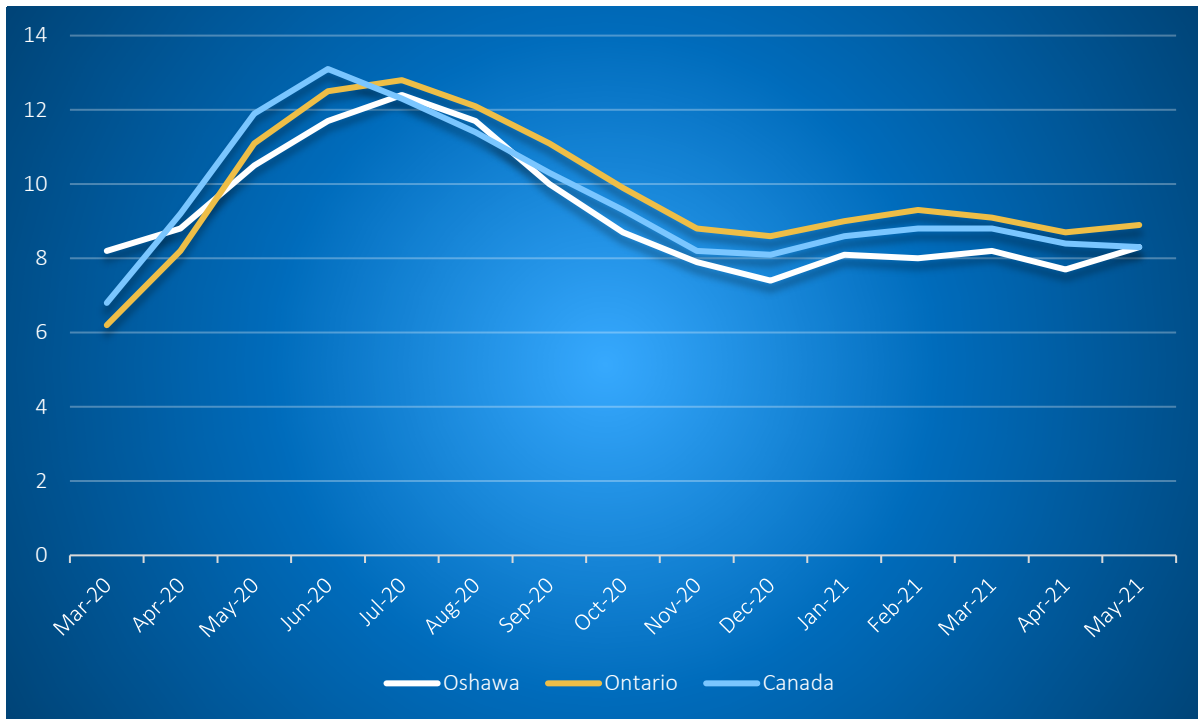
Source: Durham Region COVID-19 Data Tracker, Durham Region Health Department

The pandemic has continued to impact employment, business, education, and economic growth in Durham Region. In immediate response to the COVID-19 crisis, the Durham Economic Task Force (DETF) was formed in March 2020 to deliver critical information, support, and resources to Durham’s business community to help employers through the pandemic. The DETF joins together regional and local economic development teams, Boards of Trade, Chambers of Commerce, Business Improvement Areas (BIAs), the Business Advisory Centre of Durham, and the Ontario Ministry of Agriculture, Food and Rural Affairs. The members have been engaging with key stakeholders, industry leaders, and community partners to understand the types of impacts businesses are experiencing.

To better understand the effects of the pandemic, four business surveys were launched in 2020. The task force received hundreds of responses, providing detailed reports of significant and immediate financial impacts, and the types of information and support businesses need to help them navigate through the COVID-19 crisis. The data collected was used to create the 2020 Durham Region Economic Development and Tourism Annual Report, which helped to inform this report.

The business surveys received 1,792 responses from Durham Region and surrounding municipalities representing various different sectors. When asked about the main concerns of the COVID-19 pandemic, 79% of Durham businesses surveyed reported financial challenges as the top concern in responding to the pandemic (Invest Durham, 2020). Further, 58% of companies surveyed in the Greater Toronto Area (GTA) reported shrinking in terms of employee layoffs and reducing operations (Invest Durham, 2020). Regional, provincial, and federal unemployment rates provided in Figure 3 illustrate the high levels of unemployment in the Oshawa CMA, which are similar to federal and provincial levels.

Figure 3: Regional, Provincial, and National Unemployment Rates, March 2020-May 2021



Source: Statistics Canada, Table 14-10-0378-01 Labour Force Characteristics, three-month moving average, unadjusted for seasonality



Women in the Workforce: Impacts of COVID-19

Women in the workforce have been disproportionately impacted by the effects of COVID-19 in comparison to their male counterparts (Randstad, 2021). According to Statistics Canada, over 1.5 million women in Canada lost their jobs during the first two months of the pandemic (Statistics Canada, 2021). Part-time workers, especially women, have been overrepresented in COVID-19 job losses. Some economists are calling it the first “she-cession”, with women leaving the workforce at unprecedented levels (Hunt and Bruno, 2021). Multiple lockdowns coupled with expensive public health measures have caused employers to cut economic costs, which has severely limited and removed job opportunities for women that allowed flexible part-time employment. For many women, part-time work provides an important source of income and flexibility, especially for women with family responsibilities (Behnouch and Feor, 2020).

Several factors are contributing to the decline of women in the workforce, including the fact that women are primary caregivers, women work in industries that have been severely impacted by the pandemic, and women face the added pressure of being essential front-line workers. Studies show that women spend twice as much time on child-rearing and household chores than men, accounting for over 20 hours per week (Statistics Canada, 2018). The burden on women to maintain a work and home life balance has increased substantially, as women have been forced to homeschool children or help with virtual learning, while also keeping up with work expectations (Randstad, 2021). Even with children back in school, unexpected closures and hybrid learning can force women to revise their work schedules with little to no notice (Randstad, 2021). The excess stress can lead to poor job performance, time-management issues, and the inability to focus, which ultimately puts women’s jobs at risk (Randstad, 2021).

Another factor contributing to the exit of women from the labour force is that women work in industries that have been severely affected by the pandemic (Hunt and Bruno, 2021). Of all occupation categories, the female-dominated sales and services occupations have been hit particularly hard over the past year in terms of job losses (Behnouch and Feor, 2020). Statistics Canada highlights that women occupied 55% of jobs lost in retail and hospitality (2021). The number of jobs in this sector decreased from 1.1 million in February 2020 to 630,000 in May 2020, a decline of approximately 43% (Behnouch and Feor, 2020). The situation is also particularly severe for food services, which saw mass layoffs in the fall of 2020 when the summer tourism season ended. Of the 48,000 workers who lost their jobs in that industry in October, an estimated 80% were women (Hunt and Bruno, 2021).

For the many women who were able to hold onto their jobs throughout the pandemic, they faced the added pressure of being essential front-line workers. This is especially true for women who work in healthcare, social services, and educational industries (Randstad, 2021). For example, more than 90% of nurses in Canada are women (Canadian Institute for Health Information, 2019). The stress of contracting COVID-19 in the workplace and bringing it home to family members has become a high stress factor for women working in these industries.

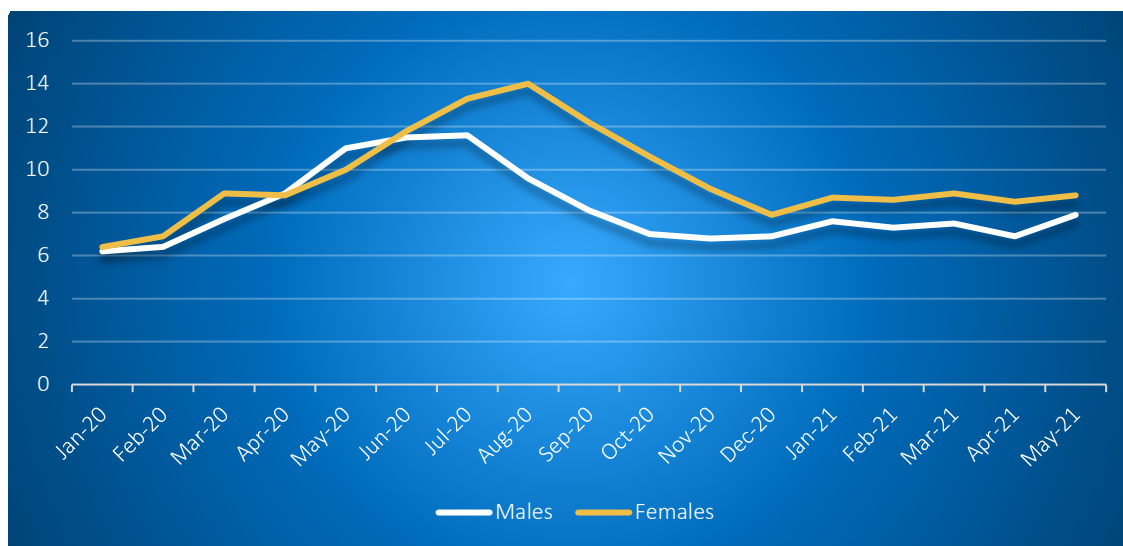
Women in the Workforce: Durham Region

Throughout the pandemic, women have been experiencing higher unemployment rates than their male counterparts. At the beginning of the pandemic, unemployment levels spiked for both sexes in the Durham Region. However, unemployment rates remained significantly higher for females throughout the first, second, and third waves of COVID-19. In March 2020, Durham Region's female unemployment rate was 8.9% compared to 7.7% for males, a 1.2% difference (Statistics Canada, Labour Force, 2021). This 1.2% difference is substantial because it represents over 1,000 unemployed women, which in turn has a dire impact on the overall labour market.

In August 2020, the female unemployment rate peaked at 14% compared to a rate of 9.6% for males during the same period, indicating a stark 4.4% difference (Statistics Canada, Labour Force, 2021). The sharp increase in women's unemployment in the Region reflects growing disparity between male and female workers and the severe impact COVID has had on women's participation in the local labour market. The third wave continued to have serious effects on female unemployment in the Region with the female unemployment rate standing at 8.8% in May 2021 compared to 7.9% for males, a 0.9% difference. Although the difference in unemployment between men and women shrunk to 0.9%, hundreds of women remain outside of the local labour market. These statistics demonstrate that the pandemic continues to have a disproportionate impact on women's employment, even more than a year into the pandemic.

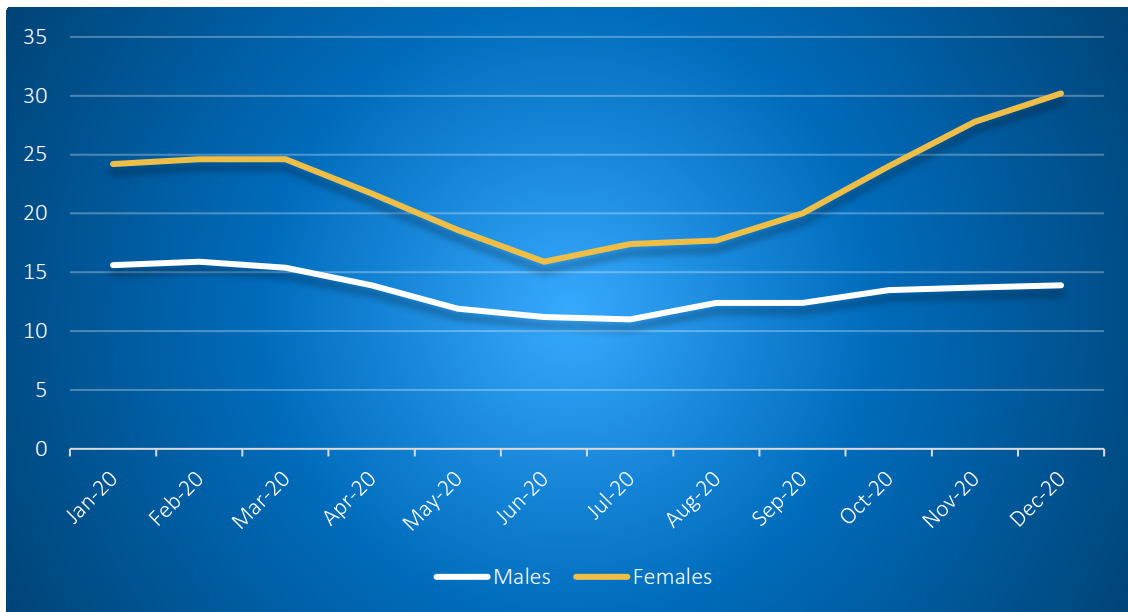
The following graphs provide a detailed look at unemployment and employment rates for males and females in the Durham Region.

Figure 4: Unemployment Rates, Males and Females, Oshawa CMA, 2020-2021



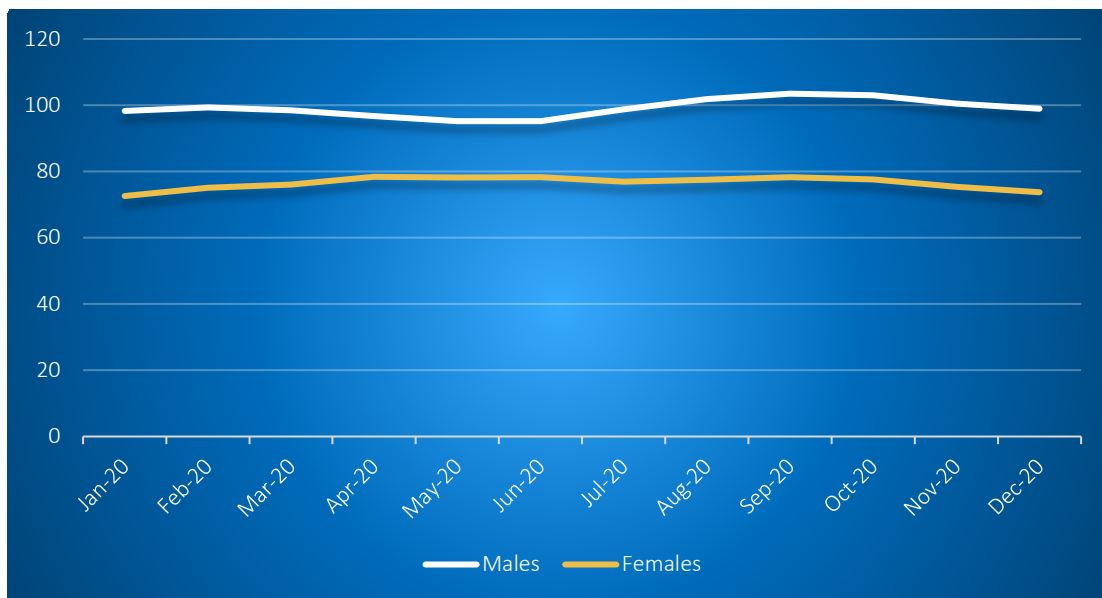
Source: Statistics Canada. Table 14-10-0378-01 Labour Force Characteristics, three-month moving average, unadjusted for seasonality

Figure 5: Part-time Employment Rates, Males and Females, Oshawa CMA, 2020



Source: Table 14-10-0095-01, Labour force characteristics by census metropolitan area, three-month moving average, unadjusted for seasonality, inactive

Figure 6: Full Time Employment Rates, Males and Females, Oshawa CMA, 2020



Source: Table 14-10-0095-01, Labour force characteristics by census metropolitan area, three-month moving average, unadjusted for seasonality, inactive

Unemployment: Black Women with Young Children

Black mothers with young children were less likely to participate in the labour market during the pandemic. Among 25 to 54 year olds, 75.9% of Black mothers with a child younger than 6 were active in the labour market, compared with 81.1% of their non-visible minority counterparts (Statistics Canada, 24 February 2021). In contrast, there was virtually no difference in the participation rate of Black (87%) and non-visible minority mothers whose youngest child was aged 6 to 17 (Statistics Canada, 24 February 2021). The 5.2% difference in participation rates reveals that Black mothers with young children were the most heavily impacted by the pandemic in terms of job losses. It also reveals that the gap between Black mothers and non-visible minority mothers with young children has expanded considerably throughout the pandemic.

Unemployment: Single Mothers

Single mothers have experienced a greater loss of employment and are recovering much slower than parents in couple families, highlighting the impact of school closures, uncertain access to childcare, and women's primary caregiver responsibilities (Scott, 2020). Over one-third (37.5%) of single mothers with children under 12 lost their jobs or a majority of their working hours when the economy shut down in the spring, compared to one-quarter (25.5%) of mothers in couple families (Statistics Canada, Labour Force Survey, August 2020). By August 2020, single mothers had only recuperated a fraction of their employment losses, with many working less than half their regular hours. One in three single mothers (29.2% or 75,000) were unemployed or working reduced hours as a result of the pandemic, including 42.4% of mothers with kids under 6 (Statistics Canada, Labour Force Survey, August 2020).

The thousands of single mothers who remain outside the labour market is serious cause for concern as it threatens to erase decades of economic progress for women's employment. The slow recuperation of job losses for single mothers also highlights the critical lack of support for women's workforce recovery. Evidently, the pandemic's economic restrictions, lack of childcare, and school shutdowns have created major barriers for single mothers looking to re-enter the workforce (Scott, 2020). Social norms and traditional caregiver roles have pushed mothers out of the labour market and into full-time caregiving and homeschooling roles (Scott, 2020). It is clear that the pandemic has magnified the pressures facing single mothers, which suggests that further hardship lies ahead as women's employment continues to suffer.

Unemployment: South Asian and Black Women

South Asian women were particularly hurt by the pandemic as they experienced significantly higher unemployment rates than their male counterparts. In 2020, the unemployment rate for South Asian women was 20.4% compared to 15.4% for South Asian men, a stark 5% difference (Statistics Canada, 7 August 2020). Black women also had a higher unemployment rate than Black men, with a rate of 18.6% compared to 15.1% for Black men, reflecting a 3.5% gap (Statistics Canada, 7 August 2020). The higher rates of unemployment for South Asian women and Black women are evidence that the COVID-19 crisis continues to disproportionately impact minority women.



Youth Unemployment: Impacts of COVID-19

Economists expect youth unemployment (15-24 years old) to be 2.5 times the normal rate of unemployment. However, Durham Region has experienced much higher rates of youth unemployment than anticipated. Since 2010, Durham Region has had one of the highest youth unemployment rates in Ontario and Canada (Durham Workforce Authority, October 2018). Youth unemployment for all of 2012 hit 21.6%, compared to an overall unemployment rate of just 6.2% for the Region (Statistics Canada, 2021). While youth unemployment rates began to slowly decrease by 2016, the recent COVID-19 crisis has caused youth unemployment rates in the Region to reach unprecedented levels. Youth unemployment in Durham Region increased to a high of 22.6% in 2020, the highest rate in almost a decade (Statistics Canada, 2021).

Similarly, Ontario's unemployment rate for youth also reached 22% in 2020 (FAO, 2021). The pandemic has caused youth employment to decline at nearly five times the pace of job loss for workers aged 25 and over (FAO, 2021). The province's youth employment rate declined by 156,900 or -15.5% in 2020, representing more than 4 in 10 jobs lost (FAO, 2021). This has brought Ontario's youth employment rate to the lowest level recorded since 1999 (FAO, 2021). Nearly three-quarters of all job losses among young Ontarians were in industries most affected by pandemic-related shutdowns, including accommodation and food services (-57,000 or -29.9%), information, culture, and recreation (-33,200 or -43.3%) and retail trade (-23,300 or -9.3%) (FAO, 2021). Youth employed in part-time positions were more affected, accounting for nearly two-thirds of the total job loss in this age group. Part-time youth workers lost jobs at a much faster pace compared to full-time youth workers, a trend that was prevalent across all age groups. Total employment among young females declined faster (-16.9%) compared to young males (-14.1%) and has experienced slower recovery throughout the year (FAO, 2021).

NEET Youth: Impacts of COVID-19

NEET (Not in Education, Employment, or Training) youth make up approximately 11.1% of Durham Region's total population, representing roughly 13,660 NEET youth in the Region (Statistics Canada, 2016). In February 2020, just before the pandemic, the NEET rate for Canadian youth (15-29) was 12%, similar to recent years (Statistics Canada, 2020). In March 2020, the NEET youth rate reached 18% and by April it peaked at 24%, the highest rate measured in the past twenty years (Statistics Canada, 2020). School closures during the beginning of the pandemic and changes to the way in which education was delivered were major contributing factors to why youth reported not attending school (Brunet, 2020). Among youth aged 20 to 24 and 25 to 29, the increase in NEET rates in the first two months of the pandemic was mostly because of a decrease in employment (Brunet, 2020).

Barriers to Employment

A youth survey, completed by 909 NEET youth across Ontario, found that the most commonly reported barriers were related to skills and experience (Blueprint Analytics, 2019). About 58% of youth surveyed said they don't have enough experience, 48% said they don't have enough education for the job they want, and about one-third of respondents (29%) said that uncertainty about how to find the job they want was a contributing factor (Blueprint Analytics, 2019). Youth also identified the local labour market context and life circumstances as factors that constrain their employment opportunities. The main findings of Blueprint's NEET youth survey were:

- Almost half of respondents (47%) said that there are not enough jobs available where they live.
- 38% said that the jobs available in their area are not suited to them.
- More than 37% of respondents said that their disability, illness, mental health, or injury make it difficult for them to work.
- Unstable, unsafe and stressful living environments were also a factor for 20% of youth respondents.
- Only 6% reported not having access to childcare as a constraint to their employment opportunities.
- Youth with children (23%) and young women with children (27%) were much more likely to identify childcare as a barrier.

Unemployment: Minority Youth

Minority youth across Canada faced disproportionately high levels of unemployment in 2020. White youth had an unemployment rate of 20.1%, compared to a rate of 36.1% for youth belonging to a visible minority group (Statistics Canada, 7 August 2020). The 16% difference in unemployment rates between white and minority youth is substantial as it reflects thousands of jobless racialized youth and the growing disparity between non-minority and minority youth.

Young black Canadians have been hit particularly hard by COVID-19, with an unemployment rate of 30.6% (Statistics Canada, 24 February 2021). This rate is almost twice as high than the 15.6% unemployment rate for non-minority youth. Indigenous youth also had a high unemployment rate of 20.9%, which is approximately 5.3% higher than the unemployment rate for non-minority youth (Block, 2021). The precariously high rates of unemployment rates for Black, Indigenous, and other minority youth denote that unemployment rates are remarkably worse for youth that belong to a visible minority group. It also signals that minority youth have felt the effects of the pandemic far more severely than white youth.

Comparably, fewer than half of Chinese Canadian youth were part of the labour force (47.2%) in April 2021 compared with more than three-fifths of non-visible minority youth (62.8%) (Statistics Canada, 21 May 2021). Chinese Canadian youth also had a lower employment rate (38.4%) than their non-visible minority counterparts (53.3%) (Statistics Canada, 21 May 2021). Similarly to other minority youth, Chinese Canadian youth have been seriously impacted by COVID-19 with much lower participation and employment rates than their non-visible minority counterparts.



Unemployment: Minority Groups

Throughout the COVID-19 pandemic, minority groups have been experiencing disproportionately high rates of unemployment compared to the rest of the population. For Canadians who are not Indigenous or a visible minority, their unemployment rate stood at 9.3% in July 2020 (Statistics Canada, 7 August 2020). Several groups had rates of unemployment significantly higher than this average, including South Asian (17.8%), Arab (17.3%), Latin American (16%), Indigenous (17.7%) and Black (16.8%) Canadians (Statistics Canada, 7 August 2020). These rates of unemployment are significant as they are almost double the rate for non-minority Canadians. The large increase in unemployment for these minority groups confirms that the pandemic has hit racialized Canadians' employment harder than that of white Canadians.

The higher unemployment levels of minority groups may be partly attributable to the greater concentration of workers in some industries hardest hit by the COVID-19 economic restrictions and shutdowns. Between February and April, employment in the accommodation and food-services sector dropped by 50%, the most of any industry (Statistics Canada, 7 August 2020). Based on 2016 census data, the proportion of people employed in that sector was higher among Korean, Filipino, and Southeast Asian Canadians, all above 14% (Statistics Canada, 7 August 2020). In contrast, only 5.9% of white Canadians were employed in the sector (Statistics Canada, 7 August 2020). Visible minority groups were also more likely to be employed in sectors with greater exposure to COVID-19. About 34% of frontline and essential service workers identified as visible minorities (Statistics Canada, 2020). The high concentration of minority workers in frontline jobs may partly explain the increase in unemployment during COVID-19.

Unemployment: Black Canadians

Black Canadians have been suffering unequally from the economic effects of the pandemic with greater financial and employment challenges than non-minority groups. According to Statistics Canada, 33.2% of Black Canadians reported that they live in households that were challenged to meet basic financial needs over the past four weeks (measured in January 2021) compared with 16.6% of non-minority households (Statistics Canada, 24 February 2021). Meanwhile, the unemployment rate for Black Canadians grew by 5.3% between January 2020 and January 2021, compared with a 3.7% increase for non-visible minority Canadians (Statistics Canada, 24 February 2021). The higher increase in unemployment for Black Canadians and their greater struggle to meet basic financial needs are confirmation that minority populations have been suffering the effects of COVID-19 more severely than non-minority populations.

Newcomers in the GTA: Impacts of COVID-19

Newcomers represent 1.8% of Durham Region's population, with approximately 7,815 recent immigrants settling in the Region in 2016 (Statistics Canada, 2016). Recent newcomers represent the smallest category of immigrants in Durham (Durham Region, 2018). The greatest proportion of immigrants moved to Durham Region from countries within Asia (36.6%), followed by Europe (31.4%), the Americas (26.6%), Africa (5.3%), and Oceania (0.4%) (Durham Region, 2018).

New immigrants were among the hardest hit by COVID-19 with an employment loss of approximately 12% among recent immigrants, compared to only 4% for the Canadian-born population (Government of Ontario, 2021). Prior to COVID, the rate of transition from employment to unemployment was low and similar for immigrants and Canadian-born, about 2% to 4% from February 2019 to February 2020 (Statistics Canada, 2020). When the pandemic hit, the unemployment rate peaked in April 2020 at 17.3% for recent immigrants and 13.5% for the Canadian born and long-term immigrants, indicating a 3.8% difference (Statistics Canada, 2020). The dramatic rise in unemployment for immigrants highlights that the pandemic has hurt immigrants' employment far more significantly than the Canadian born.

Newcomers: COVID-19 Recovery

As the transition to employment increased during the partial recovery phase, recent immigrants had rates of transition to employment that were lower than Canadian-born individuals. In May, the rate of transition to employment for recent immigrants was 5 percentage points lower than the Canadian-born, 3 points lower in June, and 1 point lower in July (Statistics Canada, 2020). Recent immigrant women displayed the largest gap with their Canadian-born counterparts, at 5 percentage points lower in both May and June, and 2 points lower in July (Statistics Canada, 2020).

Looking forward, the disproportionate impact on newcomers coupled with the decline in immigration flows resulting from the pandemic may make it difficult to fill positions in front-line and essential service sectors. The economic and workforce challenges facing new immigrants as a result of COVID-19 may also lead to larger employment gaps between new immigrants and the Canadian-born, eliminating and reversing important gains made in recent years to close the gap. Accelerated digitalization after COVID-19 may help create opportunities for skilled newcomers and visible minorities and may ultimately help to mitigate the impact of COVID-19 on immigrants' employment (Statistics Canada, 2020).

Newcomer Women

The pandemic has had a severe impact on newcomer women's participation within the local labour market. While immigrant women faced many workforce challenges prior to COVID-19, the pandemic has worsened many pre-existing economic and social inequities for newcomer women. Employment rates for immigrant women (25 to 54 years old) dropped by 12.2% between May 2019 and May 2020 (Ferrer and Momani, 2020). In contrast, the employment rate decreased by 7% for Canadian born men and women and 8% for immigrant men (Ferrer and Momani, 2020). This reflects a striking 5.2% difference between immigrant women and Canadian born men and women, and a 4.2% difference between immigrant women and immigrant men. The steep decrease in employment rates for immigrant women shows that newcomer women have been significantly impacted by the pandemic and are struggling with joblessness at a much higher rate than Canadian born men and women as well as immigrant men.

Between May 2019 and May 2020, the unemployment rate of immigrant women dramatically increased, by around 7% (Ferrer and Momani, 2020). During the same time period, the unemployment rate for Canadian-born men and women and of immigrant men grew significantly less, by approximately 4.5% (Ferrer and Momani, 2020). The sharp increase in unemployment rates for immigrant women during the pandemic illustrates that newcomer women have felt the impacts of COVID-19 much more severely than Canadian born men and women and immigrant men. The data is concerning as it points to a growing gap between immigrant women and their Canadian born and immigrant counterparts.

More concerning is the fact that immigrant women with high levels of education were particularly disadvantaged. University-educated immigrant women had the highest unemployment rates of 12.6% in May 2020, 7.3% higher than in May 2019 (Ferrer and Momani, 2020). In contrast, university-educated Canadian-born women experienced unemployment rates of 5%, only 2.7% higher than the previous year (Ferrer and Momani, 2020). The disproportionately high rate of unemployment for University-educated immigrant women is troubling as it indicates that the pandemic has greatly impacted newcomer women's participation in the labour market despite their high level of education. It also demonstrates that the social and economic inequities facing newcomer women are growing.



Healthcare Sector Impact

The healthcare sector has been under severe strain as a result of long-standing challenges that have been worsened by the pandemic. The COVID-19 virus has brought massive outbreaks to Long-Term Care facilities and hospitals across the province, affecting not only the residents and patients, but also the staff and essential visitors. As of May 2021, Durham Region saw 149 institutional outbreaks and 218 deaths in long-term care and retirement home residents (Durham Region, 2021). Healthcare staff have been working tirelessly to contain the spread of the virus while dealing with severe staffing shortages, limited funding and resources, low and declining wages, worker dissatisfaction, and burnout, among many other challenges (Lewis and Dijkema, 2020). The shortage of registered nurses (RNs) and personal support workers (PSWs), the most numerous group of frontline workers and the group responsible for the majority of hands-on care, has been particularly severe (Lewis and Dijkema, 2020).

Multiple factors are contributing to the shortage of front-line healthcare workers in hospitals, long-term care homes, and other clinical settings. A major contributing factor is the lack of funding and wage subsidies from the government to support the hiring of healthcare staff. Additional factors include the high demand for healthcare professionals in immunization clinics and intensive care units, strict staffing regulations, large workloads, stressful work environments, and the failure to recognize, value and appreciate frontline workers. Despite these challenges, Durham Region's healthcare workers continue to ensure the care needs of patients and residents are being met and that health and safety protocols are being followed to reduce community transmission of the virus. Over a year into the pandemic, Durham's frontline workers remain essential in protecting and helping patients recover from COVID-19.

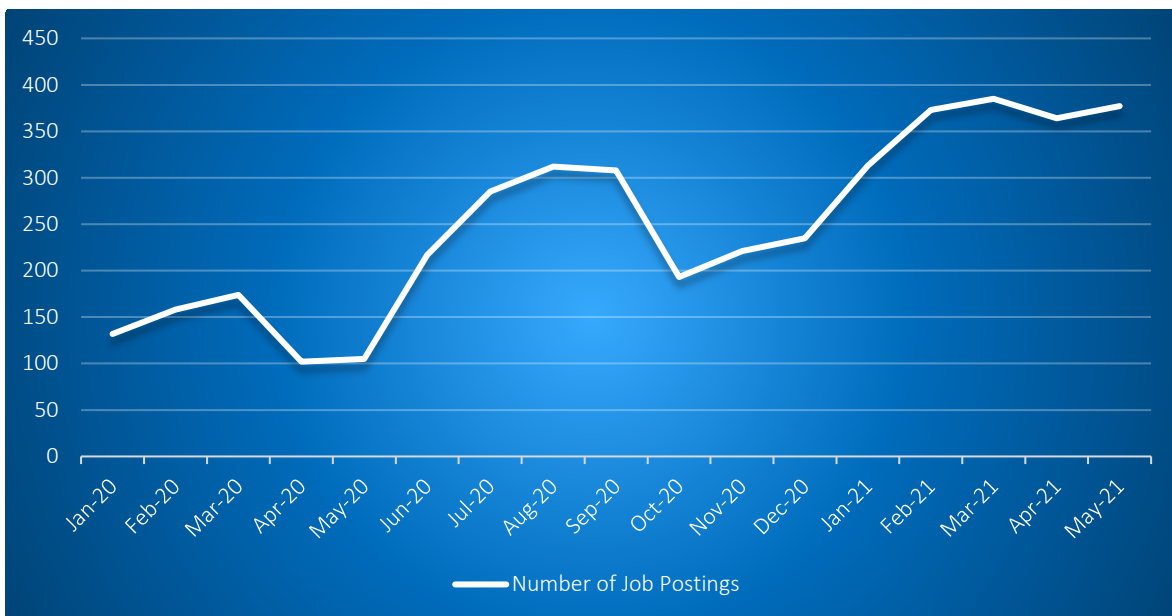
The Durham Workforce Authority's monthly Job Demand Report is created by using data collected from national, provincial, and local job boards as well as local career pages to provide insight into job opportunities by skill type. This report leverages job demand reports from March 2020 to May 2021 to illustrate the healthcare sector's recruitment needs during the COVID-19 pandemic. Figure 7 demonstrates healthcare recruitment in the Durham Region has fluctuated based on the number of COVID-19 cases in the region and reveals the continued demand for healthcare professionals.

The data shows that at the start of the pandemic, job postings for health occupations spiked in March 2020 when case numbers began to rise. As cases increased throughout the first wave of the pandemic so did recruitment for healthcare occupations. With the provincial government’s extension of the emergency order and as cases declined, healthcare recruitment began to slow down by October 2020. On April 10, 2020 when Durham Region’s positivity rate peaked at 393 cases, healthcare recruitment began to increase from May to September 2020. The Region of Durham remained in lockdown throughout in attempt to flatten the curve and eventually moved into Stage 3 of re-opening on July 17, 2020. Case counts were relatively steady and declining in all regions across Ontario in September and October of 2020. Recruitment for healthcare sector jobs decreased in October following Durham Region’s drop in case numbers.

With the easing of restrictions, social gatherings began to increase toward the end of October. Following large gatherings after Halloween, cases began to trend upward in November. The increase in the number of new COVID-19 cases in Durham Region displayed a concerning trend and the start of a second wave. As a result of the uptick in cases, the Region moved into an Orange-Restrict zone on November 16 in an effort to prevent the spread of the virus. Despite enhanced public health measures and restrictions, such as increasing screening measures, introducing new hours of operation, and placing capacity limits for retail stores, restaurants, and gyms, cases continued to climb. The holiday season in December continued to see a rise in community transmission of the virus as social gatherings, travel to other regions, and traffic in shopping malls increased.

Durham Region continued to see an increase in COVID-19 cases and variant cases of concern in January 2021. With case numbers continuing to increase steadily throughout March and April, the Ontario government imposed a stay-at-home order aimed at curbing the third wave of the virus, which took effect on April 8. Durham Region health officials confirmed 175 new COVID-19 infections on April 8 with authorities tracking 1,372 active cases, with 49 patients hospitalized and 24 of them in intensive care (The Star, 2021). The first, second and third waves have had lingering effects on recruitment for the health sector. From May to September 2020, there was a steady increase in job postings for health occupations. In the first quarter of 2021, the number of job postings for health occupations also increased from January to May, with a slight decrease in April. This upward trend illustrates that the continuous need for healthcare professionals in the Durham Region and their important role in fighting COVID-19.

Figure 7: Job Posting by Skill Type - Health Occupations, January 2020-May 2021



Source: Durham Workforce Authority Job Demand Reports

The following list represents established strategies created to support the healthcare sector and long-term care sub-sector throughout and beyond COVID-19 recovery:

- The Municipality of Durham Region created the **COVID-19 Community Assistance Fund** to provide funding support to organizations to support the Region's homeless community. Several organizations received funding, such as VHA Home Healthcare, to help homeless residents or residents at-risk of homelessness who have been impacted by the pandemic.
- At the start of COVID-19 outbreaks, local manufacturers and businesses pivoted to produce **personal protective equipment (PPE)**. Over 200 PPE suppliers in the Durham Region have been providing equipment such as face shields, floor decals, goggles, masks, plexiglass shields, rapid testing, sanitizer, signage, thermometers, contract tracing, disinfectants and disinfecting services, on-site screening, employee PPE application and disposal training, and other specialized products and services (Invest Durham, 2020).
- The Ontario Government announced a **new accelerated training program for Personal Support Workers (PSWs)**. The government is providing \$115 million to train up to 8,200 new personal support workers for high-demand jobs in the health and long-term care sectors. Public Ontario Colleges, such as Durham College, are now accepting applications to the tuition-free, 6-month program. The program requires three months of coursework, experiential learning in a clinic setting, and three months in paid onsite training in a long-term care home or community care environment (Ontario Newsroom, 8 March 2021).
- The Ontario government is **providing \$86 million to help train up to 8,000 Personal Support Workers (PSWs) through private career colleges and district school boards**. Financial support will be available to new students enrolled in a PSW program at one of the participation Ontario Student Assistance Program (OSAP) approved private career colleges. Eligible students can receive up to \$13,235 to cover tuition, books, and other mandatory fees, as well as a stipend for a clinical work placement. Financial support will also be available to students enrolled in a PSW program at an Ontario district school board. Eligible students will receive up to \$7,735 for equipment, books, and other mandatory fees, as well as a stipend for a guaranteed work placement (Ontario Newsroom, 28 April 2021).
- The Ontario Ministry of Health and the Ontario Ministry of Long-Term Care developed a **Health Workforce Matching Portal** to connect healthcare organizations and job seekers. The portal helps healthcare and non-healthcare professionals, internationally trained professionals, students, and those with relevant experience to find part-time or full-time employment opportunities.



Agriculture Sector Impact

Ontario's agriculture sector is a leading driver of economic success for the province. The Ontario Federation of Agriculture reported that the sector contributed \$47.3 billion to the province's annual GDP and employed over 860,000 Ontarians in 2020 (OFA, 2021). With over 49,600 farms across the province, the sector grows and produces more than 200 different fresh, safe and nutritious products for consumers to enjoy (Royce, 2020). The majority of the 5,604 farms in the Greater Golden Horseshoe are found in the Niagara and Durham Regions.

Durham Region's agricultural sector is one of the largest primary goods-producing sectors. The Region is 84% rural and is home to more than 1,300 farms. Farms include 287 oilseed and grain farms, 183 beef cattle ranches, and 101 greenhouse nursery and floriculture farms. Durham Farms also produce milk, poultry, eggs, sheep, goats, pigs, fruit, tree nuts, and vegetables. The Region's proximity to major trade routes like the 401 and 407 Highways and the Port of Oshawa make the area attractive to agriculture businesses (Durham Workforce Authority, 2021).

Impacts of COVID-19

The pandemic has created and worsened several challenges facing the agriculture sector, including supply-chain issues, limited food-processing capacity, reduced staffing levels, and virus outbreaks. When restaurants closed at the beginning of the pandemic, it had a huge impact on products from local farms. Farmers had difficulty selling their products partly because restaurants were no longer using certain products like medium eggs, chicken wings, and certain sizes of milk. This led to the loss of products and ultimately a loss in revenue for farms. While these first impacts were eventually resolved, there continued to be difficulty in accessing food-processing facilities. While Durham's meat processing capacity was lacking prior to the pandemic, the issue worsened under COVID-19 with farmers waiting 3 to 8 months to get their animals processed and traveling far distances to available facilities.

COVID-19 has also had a significant impact on the agriculture sector's workforce. The lack of workers on farms has been always been a challenge for agriculture. However, the restrictions limiting TFWs from entering the country contributed considerably to staffing shortages on farms. As a result, many early season crops, such as Asparagus, did not get harvested in time, compounding farmers' financial losses. The pandemic also raised health and safety concerns for farm workers. The lack of personal protection equipment, and physical distancing measures at the start of the pandemic left agriculture workers vulnerable to contracting the virus, and increased the spread across farm and migrant workers. In response to the need to better protect workers in the agriculture sector, the Ontario government expanded the Agri-food Workplace Protection Program in June 2020, and committed up to \$15 million to enhance health and safety measures on farms and in food processing facilities (Ontario Newsroom, 12 June 2020). The Enhanced Agri-food Workplace Protection Program provides cost-share funding for farmers to purchase PPE, and to implement workplace modifications and other measures. Workplace modifications and additional measures include providing temporary housing for ill workers, building physical barriers for worker separation, enhanced hand washing facilities, and tent rental to expand lunchroom space (Ontario Newsroom, 12 June 2020).

Similarly, the Municipality of Durham Region issued a class order on June 24, 2020, under the *Health and Protection and Promotion Act*, to protect temporary foreign workers. The COVID-19 order for TFWs was later revised on July 16, 2021 and currently remains in place. The order includes several measures such as limiting work to one agricultural farm, ensuring all unvaccinated TFWs quarantine for 14 days in a hotel or employer-provided and inspected housing, keeping a list of names of all TFWs scheduled to arrive and a plan for isolation, ensuring physical distancing, and providing access to adequate laundry, cleaning supplies, food, water, masks, means of communication, and personal hygiene products for TFWs completing isolation requirements. While the new restrictions have caused some concern and confusion about employer requirements, the Durham Region Migrant Agricultural Workers Network has been working with local businesses to help them navigate the new measures and to assist with accessing funding to cover expenses such as the cost of quarantining workers (O'Meara, 2021).

Despite additional health measures, more than 1,300 temporary foreign workers (TFWs) contracted COVID-19 on Ontario farms during the summer of 2020. The spread of the virus among farms has continued to be an on-going challenge throughout the summer 2021. As of August 2021, there have been 7 concluded workplace outbreaks and 2 ongoing outbreaks in Durham Region's agriculture sector (Durham Region Health Department, 2021). Outbreaks on farms in the Region have created new challenges for many agricultural growers and producers. The task of containing outbreaks and recovering from them has made it difficult for farms to take on more temporary foreign workers. Many farms, such as Hy-Hope Farm in Durham Region, rely on temporary foreign workers to fill agricultural jobs. Leaders in the industry have expressed concern about the need to retain and protect workers. Many businesses also remain concerned about the impact of COVID-19 restrictions on their ability to hire temporary foreign workers. Although workforce challenges have been long-standing for agriculture, hiring and retaining staff has become increasingly difficult due to COVID-19.

In response to the pandemic, some agricultural businesses shifted to e-commerce, agri-tourism, and direct sales to consumers. The farms that transitioned to virtual marketplaces had success, as there was significant support for local business in the community. Businesses that moved toward agri-tourism, such as sunflower farms, apple orchards, and strawberries patches, were also able to increase their revenue as they moved online for ticket booking. The farms that were selling directly to consumers also had a good year in terms of profit, in part because there were not many activities open under lockdown restrictions and support local messaging was strong.

The following list represents established strategies created to support the agriculture sector throughout and beyond COVID-19, as well as protect migrant and temporary foreign workers:

- Durham Region farmers are offering **Virtual Farm Tours** throughout 2021, on the Durham Farm Connections Facebook page. Each tour is hosted by a farmer who shares a beyond-the-farm-gate view of many different types of farms, including beef cattle, maple syrup, egg, greenhouse, field crop, dairy, apple orchard, sheep, peas and strawberries, hay, herb, wheat, apple cider, and more. The first tour began on March 18, with over 15 tours schedule for 2021.
- Durham Farm fresh (DFF) Marketing Association, a membership association representing farms, farmers' markets, retailers, chefs, and restaurants in Durham Region, has launched an **interactive map** to help residents locate nearby DFF farms. This tool helps connect those interested in local food to the agricultural products grown in the community.
- The Golden Horseshoe Food and Farming Alliance (GHFFA) released a **new 5-year Action Plan for 2021-2026**. The new Action Plan provides an updated Plan based on economic and societal changes such as advancements in technology, the impacts of climate change, the changing policy context, and the effects of the COVID-19 pandemic on the agri-food system. The Action Plan identifies 3 broad goals and a series of objectives with 39 practical and measurable actions. The Plan includes a roadmap for each goal to demonstrate how each action will contribute to broader progress.
- The Agriculture and Agri-Food Canada (AAFC) is one of several federal departments participating in the **Youth Employment and Skills Strategy**, which aims to employ youth and youth facing barriers. The federal government introduced the Youth Employment and Skills Program (YESP) to provide a wage subsidy to employers who hire youth (15 to 30 years old) for agriculture jobs for 2021-2022. To increase youth employment in the agriculture sector, the program offers support for 50% of wages to a maximum of \$14,000 (Government of Canada, 2021).
- The **Emergency On-Farm Support Fund (EOFSF)** was announced on July 31, 2020 and provides \$35 million to boost protections for domestic workers and temporary foreign workers and to address COVID-19 outbreaks on farms. The program will help agricultural producers with some of the costs for activities that improve the health and safety of all farm workers, domestic, and temporary foreign workers by limited the spread of COVID-19 in agricultural operations (Government of Canada, 2020). The program will provide up to \$100,00 per recipient in non-repayable funding for emergency COVID-19 response activities between March 15, 2020 and February 26, 2021.
- The **Enhanced Agri-Food Workplace Protection Program** is a funding program that started in 2020 with a budget of \$26 million to help farmers protect workers against COVID-19. In April 2021, the Ontario government announced that it is investing \$10 million to extend funding for this program to help more farmers and agri-food operators cover expenses related to preventing and controlling COVID-19 and to address unforeseen worker health and safety issues. The funding supports projects to protect farm and agri-food workers from COVID-19 and to keep Ontario's food supply strong such as improving workers' living conditions, acquiring PPE, improving physical distancing and expanding building space (Ontario Newsroom, 8 April 2021).

- The Ontario Greenhouse Vegetable Growers (OGVG) released the **HUB Connect App** to help temporary foreign workers and newcomers navigate rural communities and access regional information, contacts, and services. Developed in partnership with the Canadian Agricultural Human Resource Council (CAHRC), the app contains information on regional services such as health care providers, transportation services, local news and weather, consular information, and important contacts, and agriculture-specific guidelines (Greenhouse Canada, 2019).
- The **Canada Emergency Wage Subsidy (CEWS)** allows Canadian employers who have seen a drop in revenue during the COVID-19 to apply for a subsidy to partly cover employee wages. The subsidy will help employers re-hire workers, help prevent further job losses, and ease businesses back into normal operations (Government of Canada).



Manufacturing Sector

Manufacturing is vital to Ontario's economy. The province's manufacturing sector generated over \$87 billion in GDP in 2019 and accounted for over 80% of the province's exports (Statistics Canada, 30 July 2021; Ontario's Universities, 2019). Ontario's key manufacturing industries include autos, information and communications technologies, biotech, pharmaceuticals and medical devices (Government of Ontario, 2021). Ontario's food, beverage, and tobacco manufacturers have also remained strong and are continuing to grow (Chan et al., 2014).

Durham Region is a centre of manufacturing excellence in Canada, with particular strengths in the automotive, aerospace, and automation sectors (Invest Durham). The Region is well suited to support the development and expansion of advanced manufacturing sectors with an educated workforce and a strong system of buildings, roads, and power supplies. As mentioned, Durham Region is located on major trade routes with easy access to the Port of Oshawa, rail lines, and the 400-series highways (The City of Pickering, 2015). Many warehousing and transportation companies in the region are available to support manufacturers with the shipping of goods and supplies. The GTA offers one of the most robust supply chains in the world, where hundreds of parts suppliers and tech start-ups converge (Invest Durham). Advanced infrastructure and market access, the availability of a high-quality workforce, and a dynamic research and development environment are major characteristics that attract and support companies in the advanced manufacturing sector.

Notable manufacturers in Durham Region include General Motors (GM), which at its peak in the 1990's employed over 20,000 workers at its Oshawa plant (Szekely, 2019). After a gradual decline in production and workforce, the plant closed in 2019. GM recently returned to the Durham Region however, re-hiring between 1,400 and 1,700 workers to build pickup trucks at the Oshawa assembly plant. Other notable manufacturers include Agile Manufacturing Inc. in Uxbridge, which is the largest 3D printing service in Canada. The company creates prototypes of new products from 3D printed plastics, nylons, metals, urethanes, and more. As a 3D printing specialist, they both use and sell 3D printers, supplies, and equipment across North America.

Impacts of COVID-19

The manufacturing industry has been hit especially hard by the COVID-19 pandemic. Canadian manufacturers faced a rapid adjustment to public health and safety requirements posed by the pandemic, while dealing with disruptions to the supply chain, shifting demand, and outbreaks at manufacturing facilities. The strong reliance on their workforce coupled with considerable public health restrictions led manufacturers to scale back or stop production. While some sectors were able to shift delivery models, including working remotely, the production workforce could not work from home and were consequently laid off.

The extensive border closures between Canada and the United States due to COVID-19 interrupted supply chains and cost the industry millions in revenue. Border restrictions barring non-essential travel between Canada and the U.S. have been in place since March 21, 2020 to stop the spread of COVID-19. According to a survey by the Canadian Tooling and Machinery Association, the Canadian Association of Mold Makers, Automate Canada, and the Niagara Industrial Association, more than two-thirds of manufacturers have lost business amounting to tens of millions of dollars due to closures at the Canada-U.S. border (Canadian Metal Working, 2021).

The restrictions have led to increased costs to accommodate government-mandated quarantine, unavailability of key personnel, loss of revenue, loss of customer relationships, and reduced investment in new technology (Canadian Plastics, 2021). About 80% of respondents revealed that they require their U.S.-based customers and suppliers to visit their facility for project inspections, signoffs, and technical support and service (Canadian Metal Working, 2021). Manufacturing associations called on the government to provide a clearer definition of “essential workers” to help Canada Border Services Agency personnel better understand the guidelines, provide more detail on documentation requirements, and implement rapid testing at ports of entry to reduce quarantine periods for those traveling to perform essential services.

Durham Region’s Health Department reported a total of 46 outbreaks in the Manufacturing and Industrial sector, the highest number of COVID-19 outbreaks in the region. The Ontario government has provided a number of guidelines to minimize the spread in industrial facilities, including restricting the number of workers on site, and staggering start times (Rosen, 2021). The restrictions have forced employers to scale back production operations and reduce staffing levels, which has led to a 30% drop in revenue for Canadian manufacturers (Government of Ontario, 2020). The challenges facing the sector have been a major cause for concern as manufacturing is one of the top employment industries in Durham Region (Durham Region, 2019). In 2019, manufacturing was the fourth largest employment sector, accounting for 9% of jobs (Durham Region, 2019).

To address the decline in revenue, production, and staff, approximately 15% of manufacturers transitioned to produce eye protection, hand sanitizer, surgical masks, and other PPE (Canadian Manufacturers & Exporters, 2020). Companies within Durham Region, such as General Motors and Canada Rubber Group, used their manufacturing plants to produce facemasks and shields. This allowed General Motors to rehire 60 former employees for the project and saved Canada Rubber Group from laying off more employees (Snowdon, 2020; Szekely, 2020). Additionally, Brock Street Brewery and All or Nothing Brewhouse & Distillery switched from beer production to hand sanitizer to help local businesses combat the extra expenses of PPE (Durham Region, 2020). The transition to producing PPE has allowed some manufacturers to rehire staff, which has helped increase employment in the sector.

The following list represents established strategies created to support the manufacturing sector and create jobs throughout and beyond the pandemic:

- **General Motors is investing \$1.3 billion to bring truck assembly back to Oshawa.** The investment will help accelerate the start of production of full-size trucks at the Oshawa Assembly plant for the fourth quarter of this year ahead of the previous target of January 2022. This \$1.3B investment is helping to create nearly 1,700 new jobs and indirect supplier jobs as Canada recovers from COVID-19 (GM Media, 2021).
- The **Ontario Government is investing \$9.3 million dollars in 11 training projects** to help approximately 2,000 students and job seekers prepare for in-demand careers in the auto and advanced manufacturing industry. The funding will support projects for auto manufacturers, industry associations, training providers and public universities and colleges. For example, the Automotive Parts Manufacturers Association training program is being funded to train university and college students (Ontario Newsroom, August 31 2020).
- **The Federal Economic Development for Southern Ontario (FedDev Ontario) is investing over \$6.5 million** into a three-year program run by YWCA Hamilton to support **training for women in advanced manufacturing and related fields**. The program will help more than 500 women in the region to develop new skills for jobs in sectors where women are underrepresented, specifically in advanced manufacturing and specialized technology sectors. The program will also be expanded across southern Ontario in partnership with other local YWCAs throughout the GTA, London, St. Thomas, Kitchener-Waterloo, Cambridge, Ottawa, and eastern Ontario (Canadian Plastics, 2020). The YWCA Hamilton and YWCA Canada and industry partners are also working to launch the Curated Pathways to Innovation app, which will offer free personalized learning pathways and resources to 250 women, supporting them to acquire the skills they need for positions in technology fields and skilled trades.



Construction Sector

The construction sector is an important part of the Canadian economy and a growth industry in Ontario. The construction industry was one of the few industries in Ontario that experienced growth in 2020. According to Statistics Canada, Ontario's construction accounted for \$50.9 billion or 7.2% of the province's GDP in 2020 (Statistics Canada, 2020). This is a greater share of Ontario's GDP than in 2019, when the construction industry's GDP was 6.8% (Statistics Canada, 2020).

In the Durham Region, the construction industry is one of the top five employment sectors due to the region's proximity to the larger GTA and Hamilton construction market and more affordable land costs (City of Pickering, 2016; Oshawa Express, 2019). With projects on the go to expand public transit, infrastructure, energy generation, and residential and commercial development, Durham Region's construction sector continues to grow and thrive. Major developments such as Durham Live, an entertainment district being built in Pickering, are creating close to 10,000 construction jobs in the region. Durham Region's post-secondary institutions are also growing their construction programs. Durham College has built new shop labs, classrooms, and training spaces, and has partnered with the International Brotherhood of Boilermakers and Ontario Power Generation to update their programs to meet the needs of the construction sector (Durham College, 2021; Lovisa, 2021).

Impacts of COVID-19

The COVID-19 pandemic has caused and aggravated several challenges facing the construction sector including workforce issues, outbreaks in the workplace, supply chain issues, increased costs of materials, and restrictions for construction projects. The loss of productivity resulting from health measures, sector restrictions, and a slowed materials delivery system has cost contractors an estimated 10-12% in revenue (Cotney Canada, 2021). The continued material issues have caused significant price increases for contractors and consumers. The estimated increased cost of construction materials is about 20-22% (Cotney Canada, 2021). The cost of lumber, cement, and other construction materials remain constantly in flux. However, all prices have been more volatile over the past year with factory closings, trucker shortages, and supply chain disruption.

During the emergency shutdowns, the Ontario government also restricted non-essential construction projects from proceeding or starting. However, the government did not provide a definition of “essential”. The list of essential projects included projects associated with health care and long-term care, schools, colleges, universities, municipal infrastructure and child care centres, broadband internet and cellular technologies and services, petrochemical plants and refineries, safe and reliable operations of infrastructure, the Canada Infrastructure Program, projects that provide additional capacity to production, procession, and manufacturing, and certain projects that commenced before the shut-down.

The initial confusion surrounding health protocols and essential construction projects slowed down many projects within the GTA. This led to temporary shutdowns, the loss of 249,300 construction jobs between March and April 2020, a 43% drop in hours for construction workers, and fewer projects available for bidding (BuildForce Canada, 2020b; BuildForce Canada 2020c; Ontario Construction Secretariat, 2020a). After health and safety protocols were clearly established, construction work began again with on-site sanitation, hygiene stations, and physical distancing when feasible (BuildForce Canada, 2020b). Despite enhanced health and safety measures, such as physical distancing and frequent hand washing, Durham Region’s Health Department reported 9 workplace outbreaks in the construction sector. However, less than 1% of COVID-19 related Workforce Safety and Insurance Board (WSIB) claims have been in construction. While the construction industry was expected to rebound in 2021, Ontario’s COVID-19 emergency measures in April 2021 limited new construction projects from starting and continued to delay other projects such as strip malls and residential construction (Rubin, 2021).

Despite the significant blow that COVID-19 dealt to the construction sector, it is expected that the sector will rebound swiftly (Randstad, 2020). Increased activity within the industry reveals that it is already entering a recovery stage. The number of high-value public and private sector projects continues to break ground at a steady rate despite the challenges of the pandemic. Major projects include the Ontario Line Transit Expansion, Panda Markham Condominiums, the Scarborough Subway Extension, the Yonge North Subway Extension, Union Park, and the Hurontario Light Rail Transit Project (Construct Connect, 2020).

The following list represents established strategies created to support the construction sector and create jobs throughout and beyond the pandemic:

- To accelerate infrastructure upgrades that assist communities during the pandemic, the **Investing in Canada Infrastructure Program** is being adjusted so that provinces and territories can use federal funding to act quickly on a wider range of more pandemic-resilient infrastructure projects. The **new COVID-19 Resilience funding stream**, worth up to \$3.3 billion, provides added flexibility to fund quick-start, short-term projects. Projects will be eligible for a significantly larger federal cost share, up to 80% for provinces, municipalities, not-for-profit organizations, and Indigenous projects. The new stream will support projects such as retrofits, repairs, and upgrades for municipal, territorial, provincial and Indigenous buildings, health infrastructure, and schools, COVID-19 response infrastructure to support physical distancing, active transportation infrastructure such as parks, cycling paths, trails, foot bridges, and bike lanes, and disaster mitigation and adaption projects.
- **The federal government is providing up to \$31 million in funding to support community-led projects** that respond to immediate and ongoing needs arising from COVID-19. The Canada Healthy Communities Initiative will support local projects to create safe and vibrant public spaces, to improve mobility options, and digital solutions. Projects could include expanding outdoor seating on main streets, remodelling playgrounds for physical distancing, and creating digital apps to allow residents to access municipal services remotely.
- **The Ontario Small Business Support Grant provides up to \$20,000 to eligible small businesses impacted by provincial shutdowns.** Eligible small businesses include businesses that were required to close or significantly restrict services due to the shutdown being imposed across the province on December 26, 2020, have fewer than 100 employees at the enterprise level, and have experienced a minimum of 20% revenue decline in April 2020 compared to April 2019 (Ontario Construction News, 2021).



Logistics Sector

The Logistics Sector plays an important part in Canada's economy. In 2019, Canada's trade in goods amounted to \$1.2 trillion dollars (LORESPUB, 2021). Canada's transportation system is well developed and its services are diverse, including a vast network of highways, airlines, railways, and marine shipping companies. Logistically, the country acts as a gateway to North America, importing foreign goods and transporting them across the country and beyond. Domestic freight moves primarily by truck (70%) and rail (30%) while air and marine modes handle most international freight (Government of Canada, 2011).

Ontario is particularly well situated to capture trade opportunities with access to major trade routes and international land border crossings with the United States. Nearly, 30,000 trucks a day cross the Canada-US border daily carrying close to \$3 billion in trade, much of which are essential goods like food, medical products and household supplies (Ontario Trucking Association, 2021). Over 40% of Canadian trucking companies are in Ontario, and three quarters of freight in Ontario is transported by truck (Government of Canada, 2017). As a result, truck drivers make up 65% of employment in the Ontario transportation subsector (Government of Canada, 2017). Much of Ontario's transportation and warehousing can be found in the Greater Toronto Area (GTA). The GTA's transportation hubs, which can be found in the north and west ends of the region, provide quick access to major highways, railways, marine ports, and airports. The Toronto Pearson International Airport plays a key role in the sector, as almost half of Canadian international cargo moves through Ontario.

Durham Region is an attractive place for logistics businesses to invest as its location within the GTA and its proximity to major cities like Toronto, Montreal, and New York provide access to several transportation options, including the Oshawa Municipal Airport, the Port of Oshawa, rail lines owned by Canadian Pacific Railway (CPR) and Canadian National Railway (CNR), and four major 400-series highways. As a result of its capacity to support the logistics sector, the Region's transportation and warehousing subsectors are growing faster than in other regions of Canada (City of Oshawa, 2013). With access to water, rail, air, and ground transportation, Durham Region is able to meet the logistical needs of the global market and local industries while supporting innovation and growth.

Impacts of COVID-19

The logistics industry has had to adapt to the changing circumstances of COVID-19 in order to keep supply chains moving. When the pandemic struck, businesses within the logistics and trucking industry were faced with confusion around whether or not they were considered “essential services” and if they could cross provincial and international borders. As of March 2020, the Canada-U.S. border became closed to non-essential travel. The orders were meant to remain in effect for 30 days but have continued to be extended since the initial closure. However, individuals engaged in lawful cross-border trade are considered “essential” and are authorized to cross international borders (Reive and Kyei, 2020). These workers are still required to practice social distancing and must self-isolate upon exhibiting any COVID-19 symptoms. In addition, truck drivers entering from the U.S. are exempt from the mandatory 14-day quarantine (Reive and Kyei, 2020).

The restrictions imposed by COVID-19 had a serious impact on employment in the trucking and logistics industry. In a short time, the industry went from acute labour shortages to layoffs. The pandemic also changed the way the industry operates, as it had to adopt health and safety measures while continuing to transport essential goods. The logistics sector has also had to adapt to fluctuating demand and supply-chain interruption. Many delivery companies have faced challenges due to increased consumer demand, especially at the height of the pandemic in March 2020. Customers of the popular grocery delivery service, Grocery Gateways, reported two-week delivery windows as the company dealt with a 400% increase in online orders (Toronto Sun, 2020). Similarly, Canada Post also faced massive delivery backlogs and struggled to provide proper tracking information to customers as they were dealing with three-times normal demand.

The railway transportation sector also struggled with a shortage of empty, non-refrigerated marine shipping containers, which caused delays and logistical issues with exports for the agricultural sector (Gray, 2020). Further, the new restrictions on entry into Canada via marine transportation created some challenges and confusion for cross-border workers, including the initial ban on all shore leave in the Arctic Region. While Transport Canada has updated guidance to permit shore leave for a maximum of six hours for non-COVID-19 carrying crewmembers, some confusion still exists around the documentation requirements and health protocols.

Despite the early challenges of COVID-19, the logistics sector is expected to recover as it has become nimble in adapting to the on-going situation of the pandemic. The re-opening of the U.S.-Canada border on August 9, 2021 to fully vaccinated foreign nationals has also eased some challenges facing the logistics sector. The border changes allow American citizens and permanent residents of the United States, who are fully vaccinated, and all other fully vaccinated foreign nationals, beginning September 7, 2021, to enter the country without having to quarantine for 14 days. The re-opening of the border allows employees within the logistics sector to more-easily enter Canada to facilitate the import of foreign goods.

The following list represents established strategies created to support the logistics sector through COVID-19 recovery and beyond:

- **Transport Canada introduced new measures for the use of face coverings, masks, and gloves** in the transportation sector to protect employees who are unable to physical distance from passengers or other workers. The measures provide guidance material for aviation, marine, rail, and road transportation sectors.
- **Regional Air Transportation Initiative (RATI)** aims to help Atlantic Canada’s air transportation ecosystems affected by the economic impacts of COVID-19. This support will help the ecosystems to remain operational through the pandemic and will help support the economic growth of the region. The national initiative has a budget of \$206 million over two years and is being delivered by Canada’s six regional development agencies.
- **The Airports Capital Assistance Program (ACAP)** is a federal program providing a top-up of \$186 million through the ACAP to support local and regional airports for safety-related infrastructure projects and equipment purchases.
- **The Airport Relief Fund (ARF)** provides almost \$65 million in federal financial aid for Canadian airports to help maintain operations.
- **The Airport Critical Infrastructure Program (ACIP)** offers close to \$490 million to support Canada’s larger airports with investments in critical infrastructure-related to safety, security or connectivity.

The Future

The year 2020 was extremely challenging for business in Durham Region. Business leaders found themselves navigating expensive public health measures, renewed lockdown periods, financial losses, business closures, and workforce challenges related to recruitment, retainment, and training. The pandemic has created ambiguity about the future of the local labour market in terms of when participation rates will improve and pre-COVID activities and behaviours will resume. Durham Region's future holds a range of realities, impacts, and responses to the COVID-19 crisis. Those possible realities, impacts, and responses are explored through the scenario matrix and the recommendations for businesses. The following scenario matrix represents the critical uncertainties facing the local labour market in Durham Region.

Critical Uncertainties

This report explores critical uncertainties, which are factors that are unpredictable in terms of how they will play out and have a high impact on how the future may unfold. Defining critical uncertainties is necessary to develop plausible scenarios in order to discuss the impacts and responses of each potential reality. Two main critical uncertainties were established through consultations with economic development partners and were adapted from the Windsor-Essex Workforce Scenario Planning Report. The critical uncertainties have been identified as the key drivers of change regarding COVID-19 behaviours, unemployment, and the supply and demand of Durham Region's labour market.

Critical Uncertainty #1:

Severity of the Public Health and Unemployment Crisis

The pandemic has created critical uncertainty surrounding the severity of the public health and unemployment crisis. The uncertainty stems from the difficulty to predict the length and extent of the pandemic in terms of how long public health measures will remain in effect and how severe the impacts will be on unemployment in the long-term. The risk of contracting COVID-19, and the confusion surrounding contact tracing, the enforcement health measures, vaccine passports, and the possibility of a fourth lockdown are major concerns for business leaders in the Region.

The continued labour market disruptions caused by the public health crisis have had significant financial and workforce impacts on business in the Region. Economic development partners highlighted the immediate loss of revenue, especially among small and medium sized businesses, as well as increased levels of debt for small businesses, particularly for the hospitality sector. Economic development partners also stressed the impact on the workforce in hard-hit sectors, which saw numerous lay-offs at the beginning of the pandemic. Many individuals who were employed in highly impacted sectors, such as hospitality and the food service industry, have transitioned into jobs within growth industries and sectors where there is a lower risk of becoming infected with COVID-19. As a result, countless businesses in Durham Region continue to struggle with hiring the right candidates to fill various in-demand positions.

Evidently, economic growth and employment levels are dependent on public health recovery. In order to establish strong and swift business recovery, the workforce needs to be healthy. For the workforce to be healthy, there needs to be an adequate public health response. Schools also need to be healthy in order to enable parents to return to work, especially women who have exited the workforce to care for their children. The correlation between public health and local labour market supply and demand is critical to possible outcomes of the health and employment crisis in Durham Region.

Economic development partners identified the following indicators as important markers of the health and unemployment crisis for scenario building:

- Regional trends in community transmission (daily COVID-19 case numbers)
- Provincial vaccination rates (First dose and second dose for adults 18+)
- Regional hospitalization rates and ICU admittance levels
- Regional labour force participation rates
- Regional unemployment rates (part-time and full-time, month-by-month)
- Job Demand Reports (Durham Workforce Authority)
- Local uptake of COVID-19 support programs (municipal, provincial, federal)

Critical Uncertainty #2: Level of Social Change

The COVID-19 crisis has reshaped society in lasting ways from how individuals interact to how industry leaders conduct business. The pandemic has ushered in many changes, such as the move toward technology, e-commerce, automation, remote and hybrid work-based business models, changes in consumer and business preferences, fluctuating demand, supply-chain interruptions, and re-skilling to adapt to in-demand industries. These shifts illustrate that COVID-19 has driven the behaviours of business leaders, consumers, employees, and job seekers and has transformed the way the local labour market functions. Employers have had to re-adjust to the changing landscape and quickly manoeuvre the challenges that the pandemic has imposed.

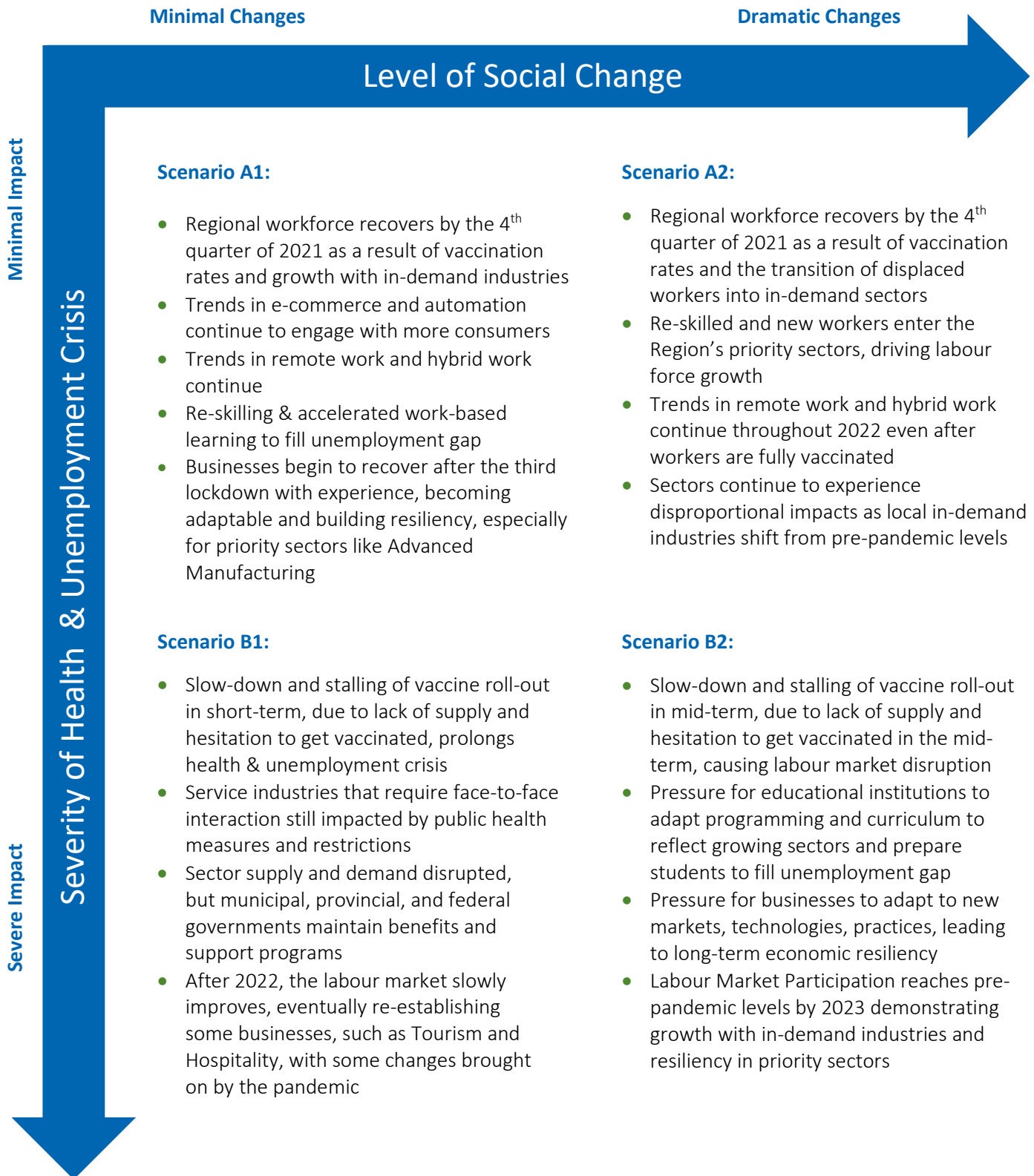
The recovery of the local labour market is heavily intertwined and dependent on public health recovery. Economic development partners emphasized that there cannot be economic and employment recovery without a healthy workforce. The interconnection between public health and the local labour market is an important relationship that will affect the recovery of business in the Durham Region.

Economic development partners identified the following indicators as important markers of the health and unemployment crisis for scenario building:

- Trends in technology and automation
- Trends in e-commerce, digital marketplaces, and uptake of digital service programs to maximize digital presence
- Trends in remote work, hybrid work models, and the rise of virtual platforms
- Vaccination rates, provincially and regionally
- Growth of in-demand industries as a result of changing business structures

Scenario Matrix

The following scenario matrix is based on potential interactions between the two critical uncertainties.



Four Scenarios: A Detailed Exploration

These scenarios are:

- Hypothetical circumstances that represent potential realities for Durham Region's labour market recovery.
- Descriptive narratives of the local economy. The impacts on each sector will vary based on the on-going development of the health and unemployment crisis.
- The outcome of international, national, and regional trends that are beyond our control. What is controllable is how Durham Region reacts to the challenges and opportunities that emerge in each scenario.
- A first version of scenarios. These scenarios are meant to initiate a dialogue about how Durham Region can overcome workforce challenges and seize opportunities in each of these potential future realities.
- Estimations about when the Region will reach pre-pandemic levels of activity.

These scenarios are not:

- Predictions about the future. We are not suggesting which scenario is more plausible or likely to occur. We are also not suggesting that the timelines are indicative of full economic recovery. Achieving full pre-pandemic economic recovery could take up to five years.
- Complete. The scenarios do not guarantee completeness or certainty. The scenarios provide a small snapshot of what the future may resemble. It is up to community partners and industry leaders to develop and complete the picture of what these scenarios may look like in full.
- Final. Specific scenarios may be revised, ruled-out, or built-on in the future.
- Attributions of value. We are not suggesting a particular scenario is better than another scenario.

Scenario A1: Local Sector Recovery

Recover Stage: July 2021-September 2021 (Q3)

- First and second doses of the COVID-19 vaccine become available for the eligible adult and youth population (12-17 years old), causing cases to decrease steadily.
- Vaccines restore a sense of safety and reduce anxiety of contracting the virus, leading to an increase in employment in retail trade, food and accommodation services, tourism and hospitality, manufacturing, and healthcare.
- By September 2021, most local businesses have established an e-commerce platform to limit the loss of revenue, respond to consumer demand, and offset costs in the event of a fourth wave lockdown.
- Trades and apprenticeships, work-based learning, and training programs that require in-person instruction resume in local facilities while adhering to public health and safety protocols.
- The tourism sector begins to experience economic growth, as the public feels safe to re-engage in pre-pandemic activities.

Early Resilience Stage: October 2021-December 2021 (Q4)

- Majority of the general population is fully vaccinated. Growing demand for local goods and services as consumers re-engage in pre-pandemic activities and behaviours, increasing economic growth for all local sectors.
- Consumer values have moved toward supporting local businesses for food and goods, increasing supply and demand for small and medium sized business in agriculture and retail trade.
- Consumers purchase more local goods through digital marketplaces as a result of local businesses adapting an e-commerce presence to their business structure.

Scenario A2: Local Industry Resiliency

Recover Stage: July 2021-September 2021 (Q3)

- Steady rollout of COVID-19 vaccines allows eligible Ontarians to be fully vaccinated.
- Re-skilled and new workers enter the Region's growth industries, driving local labour force growth in various in-demand sectors.
- Disproportionate sector impacts and changes within businesses as local in-demand sectors shift from pre-pandemic levels.
- Local businesses will continue to adopt a work-from-home or a hybrid business model to protect health of employees/clients, improve productivity, and reduce costs. Nearly 25% of Canadian businesses reported they are "likely" or "very likely" to offer employees the option to continue working remotely following the pandemic (Statistics Canada, Business Survey, 2020).

Early Resilience Stage: October 2021-December 2021 (Q4)

- Sectors in e-commerce, automation, advanced manufacturing, agriculture, tourism and hospitality, and retail trade experience an increase in consumer demand after public health restrictions are reduced.
- Demand increases for local goods and goods production, which generates a boost for agriculture, manufacturing, and small retail businesses.
- As remote work becomes a permanent business model, professionals have less incentive to live downtown Toronto. Workers and their families are relocating to the outskirts of the GTA, where there are larger homes at a lower cost. In 2020, the Oshawa CMA recorded the fastest growing population in the country, with a 2.1% increase (Statistics Canada, 14 January 2021). As a result, property prices and sales volumes across the Durham Region spiked to record highs in recent months. While the increase in real estate may help boost the local economy, the rise in property prices could prevent first-time-home owners and youth from investing in property.

Scenario B1: Strain on local labour market growth

Mid Recover Stage: January 2021-December 2021

- Slow-down and stalling of vaccine roll out prolongs the unemployment crisis and prevents economic growth, with minimal societal changes.
- The third wave of COVID-19 in Ontario in April 2021 forced business closures and caused permanent job losses in various sectors. Some local businesses do not expect to survive a fourth wave lockdown.
- Sectors that rely on consumers and the supply of in-person services are still experiencing staffing shortages, worker dissatisfaction, and burnout, especially among frontline healthcare staff and essential service workers.
- Industry supply and demand disrupted in the short-term. Municipal, provincial, federal governments maintain financial support through benefits and investments for businesses and individuals. Government agencies and non-profits continue to offer support programs to help businesses access grants/funding and to establish or enhance digital markets.

Early Resilience Stage: January 2022-December 2022

- After inoculating all eligible Ontarians who want a vaccine, the COVID-19 pandemic is resolved and a return to normalcy ensues.
- The local economy slowly improves and is supported by increased demand for pre-pandemic activities and services.
- Small local businesses begin to re-open and resume activities, namely businesses in tourism and hospitality, personal care services, food services, and retail trade.
- An increase in local entrepreneurs and new businesses helps boost the regional economy.
- After 2022, the local labour market gradually improves and re-establishes business activity within sectors that were hard-hit by the pandemic, with some changes brought on by COVID-19.
- Secondary and Post-Secondary programs (CO-OP, OYAP, SHSM, training placements, trades and apprenticeships) return to full capacity, allowing students to receive skilled training in-person as new and future workers entering into the in-demand labour force.

Scenario B2: Industry Long-Term Resiliency

Recover Stage: January 2021-June 2022

- Stalled vaccine rollout due to lack of supply and unwillingness to get vaccinated in the mid-term, contributes to the severe health and unemployment crisis and causes dramatic changes to society.
- Unvaccinated population and relaxed public health measures cause variants to spread rapidly and leads to a fourth wave of COVID-19 by the fall of 2021. Regional COVID-19 case numbers and hospitalization rates begin to surge.
- Fourth wave of COVID-19 causes small business closures across the Region and prolongs unemployment in the mid term.
- Federal government invests additional funding for COVID-19 vaccines to continue immunizations.
- Local educational institutions offer new accelerated programs, and adapt curriculum, programs, and training to prepare students to fill the unemployment gap and meet increased demand within growth industries.
- Businesses continue to adapt new digital markets, technologies, and practices, leading to long-term resiliency. The shift towards technology, such as e-commerce and automation, reduces business risks and stimulates economic growth within local sectors.

Resilience Stage: July 2022-June 2023

- After vaccinations are complete for all who want a vaccine, the COVID-19 pandemic is resolved.
- Durham Region's labour market participation rate reaches pre-pandemic levels by the end of 2023, driven by employment within in-demand sectors and re-employment in hard-hit industries.
- The local labour market eventually improves, with businesses slowly re-opening and pre-pandemic activities resuming, with some changes due to the pandemic.

Recommendations for Local Businesses Adapting Scenario-Planning

- Local businesses can join the **Shop Durham Region Marketplace** – a new online marketplace with listings from Durham-based retailers and vendors, where residents can buy products from multiple stores in a single transaction. Durham businesses, including those with or without an existing e-store, can join the platform with no commissions or costs by contacting the Shop Durham Region Team at the Downtown Whitby BIA.
- Local businesses can leverage the partnership between the federal and provincial governments to take part in the e-commerce program, **Digital Main Street**. Digital Main Street Ontario Grants provides main street businesses with \$2,500 Digital Transformation Grants to help support main street small businesses with their digital expansion. The deadline to apply to the grant is the end of October 2021.
- Local businesses that are not Main Street and do not qualify for Digital Main Street programs can qualify for Business Advisory Centre **Durham's Digital Durham Starter Company program**. Funded partly by the Region of Durham, businesses will have access to a free Digital Services Squad to help expand their web and digital presence, to access digital training, mentoring, and the opportunity to receive up to \$2,500 in grant funding to help implement a Digital Transformation Plan.
- Local restaurants and food-based businesses can sign up, with no fees or commissions, for **Ritual ONE**, an accessible, online method of contactless food ordering. The app allows businesses to accept digital orders from their website and social media accounts for dine-in, contactless pickup, or delivery. For delivery options, local restaurants can choose in-house delivery, local providers, or Door Dash.
- Businesses can use the **Recovery Activation Program (RAP)**, which offers support to evolve businesses, to digitally transform, and to adapt to the new normal. RAP leverages technology to help businesses attract new customers, improve supply-chain efficiencies, manage the workforce virtually, and streamline costs.
- Businesses can use **CANATRACE**, a free, fast, secure, bilingual solution for contact tracing. The digital tool helps with data collection by allowing visitors to provide contact information directly on their own smartphone using a QR code uniquely branded for that business. By digitizing data collection, small businesses are able to minimize touch points for guests, ensure confidentiality and accuracy of information, and lessen the extra responsibilities for staff.
- Local manufacturing and tech industries can take on funding opportunities for **automation solutions**, particularly for agriculture, logistics, and goods manufacturing.
- As the future moves toward more sustainable business practices, there will be new opportunities for businesses to provide **clean technologies**. For example, the Town of Whitby will be transitioning to electric vehicles (EVs) for their municipal vehicle fleet as part of the municipality's mandate, generating an opportunity for local businesses to provide this type of clean technology.
- Businesses can collaborate with local educational institutions to offer **accelerated work-based training and skill development** (hard and soft skills, re-skilling) programs to retain employees, promote career growth, and recruit future employees to fill the unemployment gap.
- Local educational institutions can work with employers to ensure programs, technology, and training methods are relevant, up-to-date, and in line with employer and sector needs.
- Businesses with a physical space can re-examine their long-term need for office or client space to reduce costs.

Emerging Opportunities for Durham Region

Despite the many obstacles that COVID-19 has worsened for recruitment, retention, and training, the pandemic has also shined a spotlight on emerging opportunities for Durham Region. The Region's educational institutions, namely Durham College and Ontario Tech University, are well positioned to develop new training programs and technologies to prepare students to fill in-demand occupations within the Region's growth industries. By offering new accelerated training programs, work-based learning opportunities, and providing new technologies, tools, and machineries for skilled trades, students will be able to develop skills that meet industry needs. Educational institutions should collaborate with local business partners and economic development leaders to ensure programs reflect current and future industry practices and needs. Working together, educational institutions and their partners can help develop, restructure, and strengthen the local workforce.

Another key emerging opportunity for Durham Region is to invest in research and innovation to develop new technologies. Durham Region is becoming a hub for technology, as it is home to several of Canada's fastest growing technology companies. The Region's technology strengths exist in various sectors, such as health informatics, security, artificial intelligence, gaming, marketing, content management, energy management, and manufacturing automation. While there are a number of incentives for businesses looking to start, relocate, or expand in the Region, economic development partners highlighted the need for more municipal, provincial, and federal incentives to help businesses invest in research and development and to save on labour and expansion costs. Access to capital is critical to help small and medium sized businesses as they move toward new autonomous technologies, tools, and machineries. The investment in research and innovation will help drive growth, modernization, and productivity, while propelling the Region forward as a leading centre for technology.

Conclusion

The high rates of unemployment during the pandemic have been a major cause of concern for Durham Region. Businesses in the Region have been dealing with the heightened challenges of recruiting, retaining, and training workers as well as financial losses and costly public health measures. Although COVID-19 presented many obstacles, Durham Region's business community has seized opportunities to re-invent its business models and re-think its strategies to recruit, retain, and train employees. While the pandemic has dealt devastating blows to small businesses, it has also revealed the flexibility and strength of many businesses as they have quickly pivoted to new markets, new technologies, and new practices, such as developing digital marketplaces, investing in autonomous technology, and adopting remote work models.

Community consultations with local economic development partners have confirmed that Durham Region's priority sectors continue to build resiliency and adapt to the volatile changes brought on by the pandemic. Employers and industry leaders can leverage the DWA's Post-Pandemic Scenario Planning Report to help plan for future developments in the ongoing COVID-19 saga and to implement proactive labour market responses to ease the effects of COVID-19 on businesses in the Region. The recommendations are intended to support employers as they rebuild their businesses with a healthy workforce that can sustain economic growth. The initiatives and support programs outlined within the report are intended to provide information for current federal, provincial, and regional support, funding, and investments to increase labour force participation rates in Durham Region throughout the COVID-19 pandemic and beyond.

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