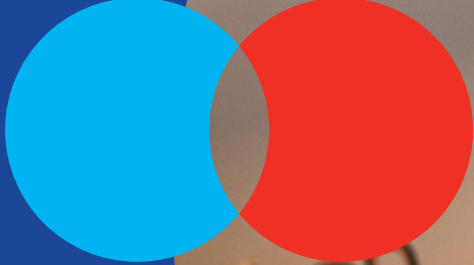


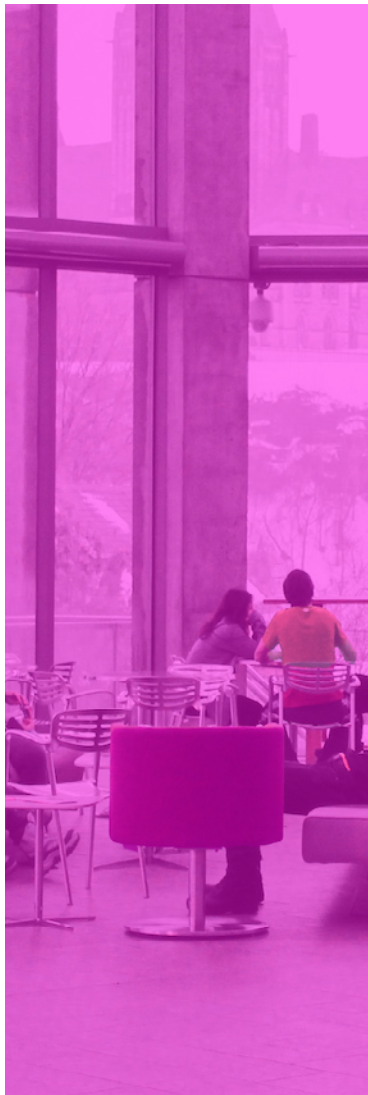
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The Only Constant

Changing Nature of Work and Skills



Future Skills Centre

The Future Skills Centre – Centre des Compétences futures (FSC-CCF) is a forward-thinking centre for research and collaboration dedicated to preparing Canadians for employment success. We believe Canadians should feel confident about the skills they have to succeed in a changing workforce. As a pan-Canadian community, we are collaborating to rigorously identify, test, measure, and share innovative approaches to assessing and developing the skills Canadians need to thrive in the days and years ahead.

The Future Skills Centre was founded by a consortium whose members are Ryerson University, Blueprint, and The Conference Board of Canada.

If you would like to learn more about this report and other skills research from FSC, visit us at fsc-ccf.ca or contact info@fsc-ccf.ca.

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Key Findings

- The COVID-19 pandemic has introduced new uncertainties into the already changing world of work. New remote and flexible working arrangements are an example of rapid adaptations that a crisis can catalyze.
- Increasing automation of industries with the associated changes in labour needs remains a persistent priority to address.
- Workers' skill sets frequently do not meet employers' needs. Leading practices that have been identified to address this problem include the following: skills-based hiring; access to good labour market information; and nimble upskilling and reskilling opportunities, including micro-credentialing.



Background

For several years, education and skills leaders and employers have been thinking and talking about the future of work. The COVID-19 pandemic turned the volume way up on those conversations.

The pandemic brought unprecedented changes to the globe. Since March 2020, we have seen a roller coaster of events facing industries, workplaces, employers, and workers.

It has not been an easy time for employers: seven in 10 small businesses have taken on debt due to COVID-19, and four in 10 businesses say they do not anticipate normal profits again before early 2022.¹ Nor has it been easy for employees: over 1 million Canadian workers in various industries impacted by the pandemic either lost their jobs or had their hours reduced by December 2020.²

Canadians adapted to new working arrangements surprisingly well.³ The share of businesses that had half of their workforce working remotely skyrocketed from 12 per cent in February 2020 to 51 per cent in August 2020.⁴ September 2021 saw a return to pre-pandemic employment levels; however, the unemployment rate remains high.⁵

There also has been a steep rise in job vacancies in recent months,^{6,7} particularly in sectors such as hospitality and food service, health care (which has the largest staffing shortage of any sector), manufacturing and construction, retail trade, and trucking.⁸ These changes are occurring against a backdrop of persistent, pre-existing issues affecting work, such as increasing automation and digitization.

To understand the issues that employers and workers face in the labour market, we examined data from our pre-pandemic Regional Sounding Tour (RST)—held in-person across cities in Canada in 2019–20—as well as data from our Virtual Regional Sounding Tour (VRST), which took place online from 2020–21. (See “A Sounding Board for Canadians.”) Sounding Tour participants from every region shared their insights on the biggest issues facing the world of work.

1 Canadian Federation of Independent Business (CFIB), “Canada’s Small Businesses Now Collectively Owe Over \$135 Billion as a Result of the Pandemic.”

2 Charnock and others, *Canadians’ Well-being in Year One of the COVID-19 Pandemic*.

3 Saba, Bezu, and Haider, *New Working Arrangements*.

4 Ibid.

5 Statistics Canada, “Labour Force Survey, September 2021.”

6 Statistics Canada, Table 14-10-0326-01.

7 Statistics Canada, “Job Vacancies, Second Quarter 2021.”

8 Neustaeter, “These Canadian Industries Are Currently Facing the Biggest Labour Shortages.”

A Sounding Board for Canadians

The Conference Board of Canada, in partnership with the Future Skills Centre, spoke with education and skills stakeholders and with employers across Canada about their priorities, strategies, and regional perspectives.

Regional Sounding Tours, October 2019 to March 2020

- 1,032 participants across 12 events;
- discussion topics included the following: regional skills priorities, important skills for career success, how to better support vulnerable populations, vision for a better skills ecosystem.

Virtual Regional Sounding Tours, December 2020 to March 2021:

- 344 participants across 14 events;
- discussion topics included the following: how the pandemic changed program priorities, current labour market challenges, examples or suggestions for initiatives to address these challenges.

Acknowledging regional variations and unique perspectives, an analysis of 92 transcripts identified five major themes.

- equitable recovery
- essential skills
- reimagining post-secondary education
- the changing nature of work
- social and digital infrastructure

For a discussion of the other four themes, see the other reports in the series, which can be accessed at <https://www.conferenceboard.ca/futureskillscentre/sounding-tours>.



Participants were uncertain about work arrangements during and after the recovery from the pandemic, considering the challenges that businesses and workers are facing. We also know that there is strong variation across regions and industries. However, participants agreed that many changes to the work environment and the widespread adoption of communication and collaboration technologies have been positive. Examples could include individuals with caregiving responsibilities who might find remote work more accommodating to their needs; a student could intern at a company in a city centre while working from home in a rural area. Massive crises—such as a global pandemic—do disrupt the status quo and create potentially lasting changes, whether positive or negative.

The pandemic has forced us to be flexible and adapt and try new ways to approach things. And I think we just need to continue to keep that at the forefront, to allow us to think outside of the box, and apply new principles.

VRST participant, Prince Edward Island, January 2021

Rapid and Dramatic Changes

Remote working became the norm overnight.

The pandemic flipped the norm of in-person work on its head with Canadian organizations reporting tenfold increases in their remote workforce, a broad shift that seems likely to transform work arrangements significantly.⁹ Businesses that could move partially or entirely online had to do so quickly at the start of the pandemic in March 2020, and part of this was preparing staff to work remotely.

That's the biggest adaptation that I've really seen, in businesses and the public in Manitoba, how quickly we've adapted to getting to this online world.

VRST participant, Manitoba, March 2021

More recently, only 6 per cent of Canadian organizations report plans to return en masse to the office; a hybrid reality is more likely for most organizations.¹⁰

Employers discussed the supports they developed for their staff in response to the pandemic shutdowns, including a focus on mental health and flexible work arrangements to help families while ensuring their businesses remained viable.

⁹ Conference Board of Canada, The, *Working Through COVID-19*.

¹⁰ Ibid.

In the midst of crisis, there are also a lot of opportunities. We expedited a lot of these digital initiatives ... implementing work-from-home policies and guidelines, flexible work arrangements, providing all the equipment.... On a regular basis, we were putting on sessions for our staff to be able to manage through many changes in their own personal lives but also the work environments, how we connect with others.

VRST participant, Nova Scotia, January 2021

However, participants also noted how difficult it was for employers to lay off workers whose roles have become obsolete in a virtual work environment. Although technological disruptions are not unique to the pandemic, physical distancing measures have motivated employers to adopt technology to move their sales and customer services online,¹¹ reducing the need for some roles.

Over the last year, these industries have also adapted and turned to tech products and services to complete the jobs that were traditionally completed by people. So, to me, this is a concern because some of these jobs are now being rendered a little bit obsolete.

VRST participant, Saskatchewan, March 2021

A participant in Manitoba described a restaurant relief initiative that stemmed from the idea of reassigning staff whose roles have become obsolete to work in restaurants. From this smaller-scale initiative, the notion of talent reassignment led to the launch of a government-funded program to help restaurants in the province that were in urgent need of resources.

Digital Skills Became Critical

The transition to virtual working (and schooling) highlighted the central role of basic digital skills. Participants told us that the pandemic has emphasized the growing importance of these skills to working effectively. Operating a viable business in such challenging times requires business managers and employers to be increasingly digitally literate. A strong web and social media presence is also critical, but we heard from Sounding Tour participants that businesses often lack these capabilities. For business owners who already find tax and insurance policies difficult to navigate, shifting to online services and programs only added to the bureaucratic complexity.

Participants also spoke about the difficulty in filling jobs requiring digital skills during the pandemic and retraining existing staff for virtual work. In response to this amplified skill need, participants emphasized the importance of digital skills training to keep up with the changing labour market, hoping that this training could happen sooner rather than later and particularly to support more vulnerable populations.

We really want to accelerate our support for those clients who have limited exposure or no exposure to technology—provide them with digital literacy.

VRST participant, Saskatchewan, March 2021

¹¹ Frank and Frenette, "Automation, Workers and COVID-19."

Leaders in Manitoba shared how the pandemic has spurred workplaces to change their approach to working digitally and to foster the development of digital skills for their employees.

Today, [a digital presence] is an absolute requirement.... And it's looking at the skill sets within your own organizations and making those determinations such as, "Okay, what kind of retraining do we need or upskilling am I going to need to get [for] my staff, based on what the new reality of my business is?"

VRST participant, Manitoba, March 2021

See our publication on essential skills for more discussion of the critical need for digital literacy for education, work, and everyday life.¹²

Long-Standing Challenges Did Not Disappear

Automation is on the rise, and workers will feel the crunch.

We heard concerns about the growth of technology that is putting Canadian workers at risk as more jobs are becoming automated.¹³

There is a consensus that automation is having a tremendous impact on jobs, skills, and wages and that the significant impact will increase in the coming years. Automation is changing work and work structure.

RST participant, Moncton, New Brunswick, November 2019

Like participants in New Brunswick, leaders in Saskatchewan shared concerns about automation and the advancement of artificial intelligence and digital technologies that have begun to do jobs traditionally done by people, leaving many unemployed. Participants acknowledged concerns around the technological changes facing the labour market and suggested that they needed to better understand how automation impacts careers, particularly the impact of automation on vulnerable populations. Nearly one in five Canadians is in an occupation at high risk of automation, and workers who identify as Indigenous, female, or racialized, or who are between 15 and 24 tend to be disproportionately represented in the top occupations with the most risk.¹⁴

At the same time, we heard that there were high-tech jobs going unfilled, suggesting a mismatch between the skills required to implement these new technologies and the skills that current workers have.

12 Macpherson and Rizk, *Essential Skills for Learning and Working*; the Sounding Tours website at <https://conferenceboard.ca/futureskillscentre/sounding-tours>.

13 Frenette and Frank, *Automation and Job Transformation in Canada: Who's at Risk?*

14 Gresch, *Responding to Automation: How Adaptable Is Canada's Labour Market?*

We have more projects right now in artificial intelligence and software development with the automation of a lot of industries. You just can't fill the [high-tech jobs].

RST participant, St. John's, Newfoundland and Labrador, October 2019

Indeed, we know that this skills gap is on employers' minds: findings from a survey of 1,500 large companies indicate that two-thirds of executives noted that addressing the skills gaps caused by automation and digitalization was among their top 10 priorities.¹⁵

Skills Mismatches Persist

Mismatches between workers' skills and employer's needs were a consistent issue raised by participants. In diverse regions in Canada, we heard about skills and job misalignment, shortages of skilled workers, and lost opportunities for business growth. These challenges were particularly acute in rural communities. In Prince Edward Island, for example, with its small, aging, rural population, employers are struggling to fill positions, and recruitment and retention are key concerns. The pandemic has exacerbated this labour market shortage: recruitment from abroad has largely been paused, and some older adults retired early due to safety concerns.

We know that these problems have a significant impact on businesses. For example, having employees' skills misaligned with their roles impacts business productivity and competitiveness, leading to higher staff turnover and hindering organizations from reaching their highest potential.¹⁶ This poses a question around mitigating skills mismatch/misalignment.

How Can Workers' Skills Better Match Employer Needs?

1. Focus on Workers' Skills, Not Only on Their Credentials

To mitigate the negative impact of skills misalignment, a skills-based approach to hiring can help to identify and recognize talent, build on existing skills, and increase worker retention. This decouples skills from formal credentials, recognizing individuals' skill base in their appropriateness for a position, rather than hiring by credentials or their work history. In fact, many are calling for a skilled-based approach to hiring that would help fill important roles with the best talent.^{17,18}

Just because you have a "piece of paper" doesn't mean you have a skill set, and someone may have a skill set but not have a "piece of paper" ... someone may have work experience and skills that they need to articulate in a certain way.

RST participant, Humber Valley, Newfoundland and Labrador, October 2019

¹⁵ Ibid.

¹⁶ International Labour Organization, "What Is Skills Mismatch and Why Should We Care?"

¹⁷ Field and others, "Hire More for Skills, Less for Industry Experience."

¹⁸ See also Vander Ark, "The Rise of Skills-Based Hiring and What It Means for Education."

**Offering non-traditional credentials—
like micro-credentials—is one promising
path toward providing workers with more
practical training solutions in a shorter
amount of time.**



Conversations during the Sounding Tours discussed how this approach could open opportunities for people to move into new sectors. For example, in Alberta, participants encouraged industries to be more accepting of workers transitioning out of certain sectors and to support these transitions. This would create a bigger pool of job seekers and enable talented workers to fill available jobs.¹⁹

Alberta has experienced a triple whammy hit to its economy as a result of the downturn in its oil and gas sector, the impact of the pandemic, and ... the acceleration of technology..... Many Alberta businesses have fallen ... and many jobs have been lost.... Having skilled workers to support and grow technology-oriented companies is essential.... We have an opportunity with our motivated workforce and highly skilled educators to ... match supply with talent.

VRST participant, Alberta, February 2021

Individuals would need to be able to recognize and communicate their skill sets to prospective employers and then be able to apply their existing skills to new work environments. Participants from Alberta raised the need for “one standard way of demonstrating skills” to employer partners.

Sounding Tour participants from Prince Edward Island noted how urgent it is to bridge existing gaps in skilled labour, using the example of skilled immigrants who lack Canadian credentials for certain jobs. Governments and employers facing talent shortages could collaborate to fund training for newcomers and support a more inclusive workforce.

2. Provide Responsive and High-Quality Opportunities for Skills Development

Learning new skills can make a critical difference in the labour market by helping workers succeed in changing times:

Knowing that education is still such a strong currency in the labour market ... how can people illuminate the skills and the knowledge in the learning they already have, so that they don't need to start at the beginning again.

VRST participant, British Columbia, March 2021



¹⁹ For an example of how the tech industry is doing this, see Shortt, Robson, and Sabat, *Bridging the Digital Skills Gap*.

The Conference Board of Canada

An estimated 44 per cent of the skills needed to perform one's role effectively will change by 2025, illustrating the critical need for individuals to have opportunities to upskill or reskill.^{20,21}

The need for employers to support upskilling and reskilling was a key point of discussion for participants before and during the pandemic. Discussions underscored the need to explore specific upskilling and reskilling programs for youth, mid-to-late career workers, newcomers, and under-represented groups to ensure no one is left behind.

There's definitely a skills mismatch as people start to talk about the knowledge economy, digitalization, how that's going to be sweeping the workforce. It's definitely a challenge to think of ways to support our more marginalized people, in particular, people with developmental delays or people with literacy challenges.

VRST participant, Northern Ontario, March 2021

With changes engendered by the pandemic—such as the increased need for digital competencies—we heard that businesses are transforming the way they approach training in response to evolving skills needs.

Businesses are now recognizing that they have to get more involved in training and upskilling their workforce. A more robust e-learning infrastructure is needed in Canada.

VRST participant, New Brunswick, February 2021

We heard interest in our Sounding Tours about offering non-traditional credentials—like micro-credentials—as one promising path toward providing workers with more practical training solutions in a shorter amount of time compared with traditional credentials (i.e., degree or diploma programs). In Southern Ontario, participants discussed micro-credentialing as a way for workers who want to re-enter the labour market and need to reskill to remain relevant for jobs in the current labour market. Similarly, participants in Manitoba identified the need to adapt to new ways of (re)learning and saw potential in upgrading skills through micro-credentials.

There's going to be disruption.... It's happening much more rapidly now. And certainly because of COVID ... there's a gap in the market for short micro-learning that leads to acquiring skills that people need.... And I think that lifelong micro-learning trajectory is the future for the institutions.

VRST participant, Alberta, February 2021

20 World Economic Forum, *The Future of Jobs Report 2020*.

21 Upskilling refers to learning new skills to succeed in a current job; reskilling refers to learning new skill sets to perform a different job. For a detailed discussion of the skills that leaders told us were in demand, including social and emotional skills, see Macpherson and Rizk, *Essential Skills for Learning and Working*; and the Sounding Tours website at <https://conferenceboard.ca/futureskillscentre/sounding-tours>.

Micro-credentials were viewed as “the way of the future” to support displaced workers and support lifelong learning initiatives. However, there is not enough empirical research to know whether there is employer recognition of micro-credentials and what their value is in the labour market. More work is needed to assess the overall impact of micro-credentials.²²

3. Invest in Stronger Labour Market Information

Businesses, industries, and post-secondary institutions view improving access to reliable labour market information as a priority. This requires mechanisms for the coordination of supply and demand with labour. Access to timely and accurate information on employment needs and opportunities is important, such as that provided through the Labour Market Information Council.²³ Participants in the Sounding Tours value reliable labour information. For example, educators want data from employers on what competencies are most needed so they can teach accordingly.

We need to do a better job of sharing the labour market information with all of the audiences and policy-makers ... jobseekers and employers, training providers, that sort of thing. We are working really hard at sharing that kind of stuff on a platform, and there will be a lot we need to do.

RST participant, Charlottetown, Prince Edward Island, February 2020

Discussions during the Regional Sounding Tour in Manitoba underscored the need for employers and educational institutions to collaborate closely in skill areas needed for employment, so students are well-equipped for the labour market. Similarly, in Alberta, participants expressed their wish that governments, industries, and educational institutions would work together “so that they can come together to build a pipeline that we need for jobs.” An important part of this is opportunities for work-integrated learning (WIL)—such as co-ops and internships. Participants stated these were valuable since they enable employers to support students in acquiring in-demand skills through real-world experience.

Ready for the Next Disruption

Given the rapid changes that have burdened the workforce over the past two years, virtual participants affected by the pandemic were concerned about planning for a future where disruptions may occur again. The rapid and unprecedented changes of the pandemic pushed us outside of our comfort zones and showed that changes can occur more quickly than many thought possible.

²² Smith, Rizk, and Kumah, *Beyond the Classroom*; and Sounding Tours website at <https://conferenceboard.ca/futureskillscentre/sounding-tours>.

²³ Labour Market Information Council.

When people come out of crisis, they become more open to change because they've demonstrated to themselves that they are capable of making changes.... I think [we] are really going to need people to be open to change; perhaps society will be there with us. So that's an encouraging sign for the future.

VRST participant, Northern Ontario, March 2021

From what we have learned on these Sounding Tours, employers need to continue to address issues that existed prior to the pandemic, issues such as the rise of automation. They also need to continue prioritizing issues exacerbated by the pandemic, such as providing employees with mental health support, managing digitization of work, and recognizing the need for more flexible work opportunities. Businesses and education leaders introduced innovations that could help with persistent challenges facing the workforce. Creativity, adaptability, and flexibility may help them remain viable and competitive.

The future of work as we know it has changed. It is therefore imperative that the workforce remains flexible and open to new innovations and that there are opportunities to collaborate to train individuals in in-demand skill sets. It is also clear that lifelong learning remains a highly valued quality in navigating the future of work. Regardless of the approach, the continuous acquisition and development of skills is essential, as the world of work will continue to change.

Changes in the workplace are very much related to other key themes, such as post-secondary education, essential skill sets, equity, and infrastructure. Our other reports discuss these themes, which feature Canadian leaders' thoughts on the future of work and skills.²⁴

What's Next for the Future Skills Centre?

The Future Skills Centre continues to engage closely with the skills ecosystem, including training providers and employers, to address the issues outlined in this paper. Not long after the pandemic started, FSC issued an open call for organizations working to “shock-proof the future of work.” The call resulted in 64 new partnerships with a diverse array of organizations looking to innovate and support resilience through this period of disruption. We are committed to working alongside these partners to learn about what a more resilient and inclusive future of work will entail.

The voices and perspectives featured in this report highlight the agility and resilience demonstrated by so many people and institutions in navigating the challenges of this pandemic. As a future-focused centre working actively toward an equitable and inclusive economic recovery, FSC will continue to analyze and share insights about the post-pandemic world related to the future of work and skills.

24 See list of reports at <https://www.conferenceboard.ca/futureskillscentre/sounding-tours>.

Appendix A

Methodology

In collaboration with the Future Skills Centre (FSC),¹ The Conference Board of Canada spoke with Canadians who are actively engaged in the country's skills and training community and with individuals interested in learning more about skills development and the future of work.

The Regional Sounding Tour (RST) brought together Canadians who are actively involved or interested in education, employment, skills, and training. The RST sessions were held in-person between October 2019 and October 2020.

The Virtual Regional Sounding Tour (VRST) focused on the impact of COVID-19 on Canada and how the FSC can help on the road to recovery. The VRST sessions were held virtually between December 2020 and March 2021.

Who Attended?

Most participants who attended the RST and the VRST were employers and professionals working in government, post-secondary institutions, professional associations, and non-profit organizations across Canada. We spoke to 1,376 participants at 26 Sounding Tour "stops."

Data Analysis

In total, we analyzed 92 transcripts (52 from the RST, 40 from the VRST) to help us understand communities' needs and think of a regional approach to skills training that aligns with the future of work.

Data were organized by region and whether the tour stop was in-person or virtual. Team members created a code book to code transcripts consistently. We also looked at popular themes in grey literature (news clippings, journal articles) to help us identify the latest research in skills gaps, upskilling, equity, and shifts due to the pandemic. We coded only the conversations with participants, removing all staff commentary and remarks. NVivo 12 software was used to code all interviews.

To learn more about whom we spoke to and what we asked, please visit the Sounding Tours webpage. <https://www.conferenceboard.ca/futureskillscentre/regional-sounding-tours>.

¹ <https://fsc-ccf.ca/fsc-engage/regional-sounding-tour/>.

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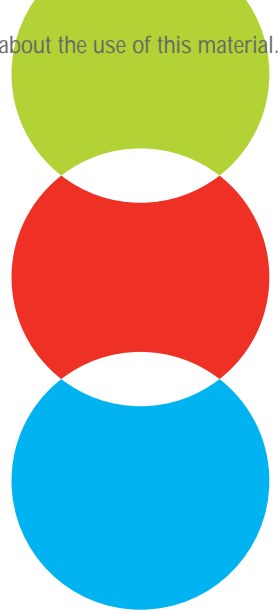
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Acknowledgements

This research was prepared with financial support provided through the Future Skills Centre. The Conference Board of Canada is proud to serve as a research partner in the Future Skills Centre consortium. For further information about the Centre, visit the website at <https://fsc-ccf.ca/>.

The following members of the Conference Board's team contributed to this research: Jessica Rizk, Senior Research Associate; Erin Macpherson, Research Associate; and Ananda Fadila, Research Associate. It was reviewed internally by Elaine Lam, Chief, Partnerships and Education Research; and by Michael Burt, Vice-President.

We thank the numerous individuals who took the time to participate in both the in-person and virtual sounding tours.

We also thank the following individuals who reviewed an early draft of this research:

- Emmanuel Edoho, Senior Policy Analyst, Labour Market Intergovernmental, Ministry of Immigration and Career Training, Government of Saskatchewan
- Kester Nurse, Labour Market Resource, West Prince Chamber of Commerce, Prince Edward Island
- Mohamed Bagha, Managing Director, The Saint John Newcomers Centre, New Brunswick

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To cite this research: Rizk, Jessica, Erin Macpherson, and Ananda Fadila. *The Only Constant: Changing Nature of Work and Skills*. Ottawa: The Conference Board of Canada, 2022.

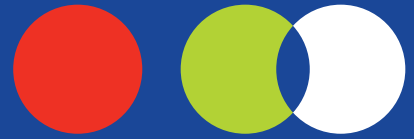
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