National Multi-Sector Rapid Labour Market Pulse

Final Project Report

October 2025









EMC

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This report was produced as part of a project funded by the Future Skills Centre (FSC), with financial support from the Government of Canada's Future Skills Program.

FSC 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 Toronto Metropolitan University, Blueprint ADE, and Signal49 Research.

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National Multi-Sector Rapid Labour Market Pulse

Project by

EMC CANADA'S LARGEST MANUFACTURING CONSORTIUM

In partnership with

BioTalent Canada
Igniting the bio-economy's brainpower
Catalyseur de l'intelligence en bioéconomie

BUILDFORCE CANADA

CAHRC-CCRHA
Canadian Agricultural Human Resource Council
Conseil canadien pour les ressources humaines en agriculture

ccaa
Canadian Council for Aviation & Aerospace

CAGBC

CSTEC

careers in energy | ENERGY SAFETY CANADA

EHRC

eco canada

Food Processing Skills Canada
Compétences Transformation Alimentaire Canada

MIHR RHIM

TruckingHR Canada

Tourism HR Canada | RH Tourisme Canada

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Executive Summary

The National Multi-Sector Rapid Labour Market Pulse project was created to address a critical gap in Canada's labour market information (LMI) system — the lack of timely, coordinated, and cross-sector insights that can inform rapid policy and workforce decisions during periods of disruption. Through support from the Future Skills Centre (FSC), EMC Canada convened a national collaboration of fourteen sectoral and workforce development organizations to design and implement Canada's first coordinated, rapid-response labour market survey.

The project demonstrated that large-scale collaboration among diverse partners is both achievable and highly effective. Each organization brought unique strengths — deep sector knowledge, established employer networks, and analytical capacity — creating a shared infrastructure capable of generating national-level insights in a matter of weeks. This initiative proved that Canada's sectoral ecosystem can mobilize quickly around a shared goal, align priorities, and deliver timely, evidence-based results that support decision-making across government, industry, and education.

The inaugural *Workforce Pulse* survey, conducted in July–August 2025, collected responses from more than 2,100 employers across all regions and sectors. The findings revealed a workforce that is both challenged and resilient. Despite trade uncertainty and tariff pressures, most employers reported plans to maintain or grow staffing levels over the following quarter. Persistent shortages in skilled trades, technical, and supervisory roles were evident across nearly every sector, confirming structural challenges that transcend industry boundaries.

Beyond the data, the project's greatest achievement was in building a model for collaboration and shared intelligence. The trust, relationships, and systems developed among partners have laid the foundation for continued collboration. Together, these efforts represent a scalable, repeatable approach to rapid labour market intelligence — one that strengthens Canada's ability to anticipate change and act with confidence.

This project was led by EMC Canada, in partnership with the following national organizations:

- BioTalent Canada
- BuildForce Canada
- Canadian Agricultural Human Resource Council (CAHRC)
- Canadian Council for Aviation and Aerospace (CCAA)
- Canada Green Building Council (CGBC)
- Canadian Skills Training and Employment Coalition (CSTEC)
- Careers in Energy (a division of Energy Safety Canada)
- Electricity Human Resources Canada (EHRC)
- Environmental Careers Organization of Canada (ECO Canada)
- Food Processing Skills Canada (FPSC)
- Mining Industry Human Resources Council (MiHR)
- Tourism HR Canada (THRC)
- Trucking HR Canada (THRC)

Project Overview

The Workforce Pulse project was developed in direct response to a growing gap in Canada's labour market intelligence system — the need for faster, more coordinated, and cross-sector insight to inform decision-making during periods of economic uncertainty. The initiative was launched at a pivotal time: amid an escalating trade dispute between Canada and the United States, when tariff pressures and global supply chain disruptions were creating widespread volatility and unpredictability across industries.

At that moment, sectoral organizations across Canada were all hearing similar concerns from employers — uncertainty about orders, labour shortages, and difficulty planning ahead — but there was no mechanism to capture and coordinate these insights nationally. The Workforce Pulse was conceived to fill that gap, testing whether a large, multi-sector collaboration could generate timely, comparable data that would help policymakers, educators, and industry leaders make faster, better-informed decisions.

A First-of-Its-Kind Collaboration

This project brought together fourteen national sectoral and workforce development organizations representing a broad cross-section of Canada's economy. This scale of collaboration had never occurred before among these groups. Each partner brought unique expertise, established employer networks, and data collection infrastructure, enabling a shared initiative that reached every region and major industry.

The Workforce Pulse demonstrated that when Canada's sectoral partners align around a common purpose, they can deliver intelligence that is not only faster and more relevant but also richer and more representative of the national picture. It proved that collaboration of this magnitude — across sectors, regions, and mandates — is not only possible but highly effective.

Project Goals

- Test a scalable model for rapid, coordinated labour market data collection.
- Capture near-real-time employer insights during a period of trade and economic disruption.
- Demonstrate the feasibility and value of large-scale, cross-sector collaboration.
- Strengthen Canada's ability to generate actionable, responsive labour market intelligence.

Sectoral and Workforce Development Partners

Excellence in Manufacturing Consortium (EMC) was the lead partner of this project that brought together the following diverse group of partners, each with distinct roles and valuable contributions.

- **BioTalent Canada** supports the people behind life-changing science. As a trusted source for labour market intelligence, it provides evidence-based data and industry standards to the bio-economy. Focused on workforce development, BioTalent Canada connects job-ready talent with employers, helping ensure the sector's long-term agility, resilience and sustainability across Canada.

- **BuildForce Canada** is a national industry-led organization committed to working with the construction industry to provide information and resources to assist with its management of workforce requirements.

- **The Canadian Agricultural Human Resource Council (CAHRC)** is a national, not-for-profit organization focused on addressing human resource management and workforce development in the agricultural sector. CAHRC works collaboratively with industry stakeholders to develop solutions that support a skilled, diverse, and sustainable agricultural workforce.

- **The Canadian Council for Aviation and Aerospace (CCAA)** is dedicated to help industry attract and develop workers with the skills the Canadian aviation and aerospace industry needs to meet the demands of the current and future workplace.

- **The Canada Green Building Council (CAGBC)** supports the people and businesses involved in designing, constructing, and operating buildings. They offer practical solutions that unlock the value of green buildings for attracting investment, reducing costs, and increasing asset value and resiliency. Working collaboratively with members, industry, and government, CAGBC can reduce environmental impacts and help Canada's building sector achieve their business, sustainability, and carbon leadership goals.

- **The Canadian Skills Training and Employment Coalition (CSTEC)** enables innovative, multi-stakeholder solutions to training, recruitment, and labour market challenges in Canada's manufacturing sector. CSTEC partners with employers, unions, and colleges to upskill youth, newcomers, women, Indigenous and racialized skilled workers, facilitating job placements and apprenticeships, research, and equity-focused employment pathways.

- **Careers in Energy**, a division of Energy Safety Canada, delivers vital labour market insights and helps bridge skill gaps to ensure the energy sector has access to a diverse, adaptable workforce. They support both traditional and low-carbon energy industries, enabling companies to attract the skilled talent essential for sustainable growth and innovation.

- **Electricity Human Resources Canada (EHRC**) ensures the Canadian electricity and renewable energy sector has a safety-focused, highly skilled and inclusive workforce. Supporting a sector that employs approximately 110,000 people across more than 600 organizations, EHRC collaborates

with industry stakeholders to develop solutions to workforce challenges and promote career opportunities. They deliver data-driven insights and practical strategies to help employers recruit, retain and develop the skilled workers essential for operating an efficient and reliable electricity system.

- **Environmental Careers Organization of Canada (ECO Canada)** is the steward for the Canadian environmental workforce across all industries. From job creation and wage funding to training and labour market research, they champion the end-to-end career development of all environmental professionals. ECO Canada aims to promote and drive responsible, sustainable economic growth, while also ensuring that environmental best practices remain a priority.

- **Excellence in Manufacturing Consortium (EMC)** is a unique, not-for-profit organization helping Canadian manufacturers grow and compete globally. Supporting 18,000 consortium and online member manufacturers with 700,000+ employees nationwide, EMC provides training, resources, events, and programs that drive innovation, productivity, and workforce development through peer networking, best practices, and continuous improvement initiatives.

- As the leading workforce development organization for Canada's food and beverage industry, **Food Processing Skills Canada (FPSC)** empowers businesses with highly skilled talent and growth resources. Founded in 2000, FPSC partners with governments, educational institutions, and industry associations to support this vital sector.

- **The Mining Industry Human Resources Council (MiHR)** is Canada's knowledge centre for mining labour market information. An independent, non-profit organization, MiHR leads collaboration among mining and exploration companies, organized labour, contractors, educational institutions, industry associations and Indigenous groups to analyze and disseminate labour market information and develop actionable solutions to industry HR challenges.

- **Tourism HR Canada** is a pan-Canadian organization with a mandate aimed at building a world-leading tourism workforce. As a Workforce Development Council, Tourism HR Canada facilitates, coordinates, and enables human resource development activities that support a globally competitive and sustainable industry, fostering the development of a dynamic and resilient workforce.

- **Trucking HR Canada** is the recognized national authority on workforce strategy for the trucking and logistics sector. They are a non-profit centre of excellence, engaging with employers, industry groups, governments, think tanks, and other stakeholders to pinpoint opportunities and develop solutions. We provide sector leaders with research insights and resources to inform evidence-based decision-making.

Notably, all partners demonstrated a strong commitment to collaboration and achieving shared goals. Each partner contributed their networks, expertise, and communication channels to ensure strong employer participation and representation across all regions and industries. Many partners expressed having traditionally operated in silos. This project provided a valuable platform to test the feasibility and benefits of cross-sectoral collaboration.

Project Activities

The *Workforce Pulse* project was implemented between May and September 2025, guided by a clearly structured work plan and executed collaboratively across fourteen national sectoral partners. Each stage of activity — from design to data collection to knowledge dissemination — demonstrated a new model for cross-sector alignment in Canada's labour-market ecosystem.

Partnership Formation and Governance

- Established a National Steering Committee and Technical Working Group, composed of representatives from each sectoral partner, to coordinate decision-making and ensure consistent standards.
- Developed shared governance protocols, timelines, and communication processes to balance efficiency with inclusivity.
- Clarified partner roles and responsibilities for survey promotion, data collection, and sector-specific analysis.

Survey Design and Development

- Co-designed a seven-question core survey focused on short-term staffing expectations, hiring challenges, workforce uncertainty, and tariff impacts.
- Created a set of optional sector-specific questions to allow flexibility for industry-specific issues such as skills shortages, automation, and succession planning.
- Reviewed and refined the instrument collaboratively, incorporating partner feedback and pilot testing to ensure clarity and comparability across sectors.

Platform Development and Survey Deployment

- Partnered with **Magnet**, a national digital platform, to host and distribute the survey across participating organizations.
- Implemented a **dual-track approach** allowing partners to either use the centralized Magnet platform or integrate the survey into their own systems to reach employers more effectively.
- Launched the first national pulse survey in **July 2025**, supported by coordinated communication and outreach campaigns across partner networks.

Data Collection and Analysis

- Collected **over 2,100 employer responses** within two weeks, representing a wide range of company sizes, regions, and industries.
- Consolidated and cleaned data for cross-sector comparability and validated results through partner review. The full results, presented in the attached *Workforce Pulse Report – October 2025* (see Appendix A), reveal important insights into the state of Canada's labour market during the Canada–U.S. trade dispute:

- **Employer Resilience:** Despite tariff-related uncertainty, more than 80 percent of employers expected to maintain or grow staffing levels over the following quarter.
- **Systemic Skills Shortages:** Persistent vacancies were reported in skilled trades, technical, and supervisory roles across nearly every sector — signalling long-term, structural gaps.
- **Sectoral Differences:** Manufacturing, transportation, and other goods-producing sectors reported more short-term workforce planning and delayed investment compared to service-oriented sectors, reflecting their direct exposure to trade volatility.



- **Emerging Skill Priorities:** Several sectors identified increased demand for digital, automation, and logistics-related competencies, underscoring the need for agile upskilling programs.
- **Regional Variation:** Employers in Western Canada expressed more optimism about growth, while those in Ontario and Quebec reported greater uncertainty tied to supply-chain disruptions.

Enhanced Capacity and Shared Learning

The process of jointly designing and executing this initiative significantly strengthened partners' LMI capacity. Shared templates, standardized survey metrics, and a unified reporting format established a common baseline for future collaboration.

Foundation for Ongoing Collaboration

All fourteen partners have agreed to continue this work beyond this funded project. A second national survey is planned for late Fall 2025 to track changes in employer sentiment, workforce stability, and skill needs. This second survey will build on lessons from the first pulse, refine survey instruments, and further institutionalize the collaborative framework as a permanent component of Canada's LMI ecosystem.

Collaboration and Partnership Highlights

The *Workforce Pulse* initiative demonstrated that large-scale collaboration among Canada's sectoral and workforce development organizations is not only possible but also highly productive. For the first time, fourteen national organizations came together to design, deploy, and analyze a coordinated labour market survey that produced consistent, comparable insights across the economy.

This collaboration required partners to work differently — sharing decision-making authority, aligning communication timelines, and building new governance and technical systems to manage joint activities. The process strengthened relationships across sectors that historically operated independently, setting a precedent for future data-sharing and joint research efforts.

Governance and Coordination

The partnership was guided by two key governance structures:

- **The Steering Committee**, responsible for strategic oversight, decision-making, and ensuring alignment across all organizations.
- **The Technical Working Group**, which oversaw data design, question development, survey methodology, and quality assurance.

These structures ensured transparency, accountability, and efficiency. Regular meetings and open dialogue created a culture of collaboration and trust that allowed the group to make timely decisions while respecting each partner's autonomy and expertise.

Shared Ownership

A key reason for the project's success was the balance between standardization and flexibility. The coalition agreed on a seven-question core survey to ensure comparability of data, while allowing each partner to add optional sector-specific questions to meet their own intelligence needs. Similarly, a dual-delivery model enabled partners to choose between distributing the survey through Magnet's centralized platform or their own internal survey tools — maximizing reach while maintaining consistency.

Communication and Collaboration

Collaboration extended beyond the survey itself. Partners co-developed outreach materials, shared progress updates, and provided mutual support throughout the process. The EMC project team played a central facilitation role — coordinating communications, providing technical assistance, and ensuring that partners had the resources and information needed to stay aligned.

The project became a platform for continuous learning: partners exchanged best practices on data collection, employer engagement, and knowledge mobilization. This cross-sector learning not only enhanced project execution but also built long-term capacity among participating organizations.

A Model for Future Collaboration

The scale and success of this partnership have attracted attention from other stakeholders across the skills and workforce development ecosystem. The project's governance model — rooted in trust, shared purpose, and coordinated execution — now serves as a model for future multi-sector initiatives. Partners have expressed strong interest in formalizing this structure to support ongoing LMI collaboration and data-sharing across sectors.

The *Workforce Pulse* has proven that collaboration is not just an operational necessity, but a strategic advantage — one that can strengthen Canada's ability to anticipate change, share intelligence, and act collectively to build a more resilient workforce.

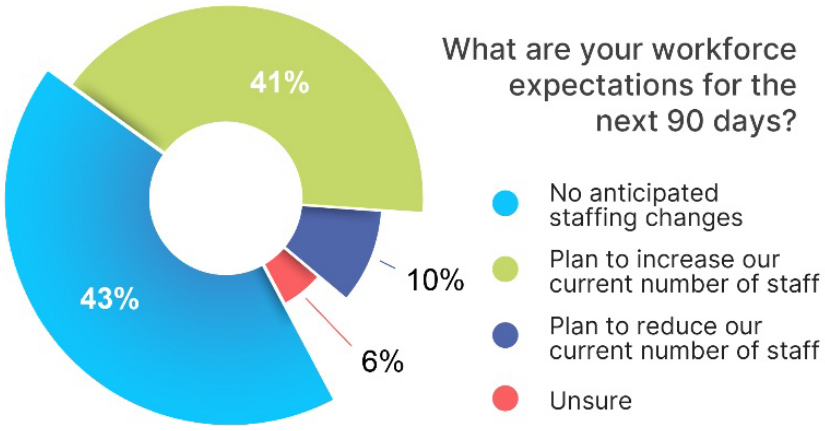
Key Findings and Insights

The first *Workforce Pulse* survey provided a timely snapshot of employer sentiment and workforce dynamics across Canada during a period of considerable uncertainty. Conducted between July and August 2025, in the midst of escalating trade tensions between Canada and the United States, the survey gathered 2,145 employer responses representing a cross-section of sectors, regions, and firm sizes.

The results highlighted both the resilience of Canadian employers and the systemic workforce challenges that continue to constrain growth and innovation. The following findings are drawn directly from the *Workforce Pulse October 2025 Report* (attached as Appendix A).

National Insights

Resilient Workforce Outlook: Despite trade disruptions and economic volatility, more than 80% of employers indicated that they expected to maintain or increase staffing levels over the following 90 days. Only a small fraction (fewer than 10%) anticipated layoffs or workforce reductions. This demonstrates the adaptability of Canadian businesses and their ability to absorb shocks without immediate workforce contraction.



Persistent and Widespread Skills Shortages: Across nearly every sector, employers reported ongoing difficulty filling skilled trades, technical, and supervisory roles. Many cited competition for qualified workers and an aging workforce as major barriers. These shortages were consistent with long-term structural gaps rather than short-term labour fluctuations.

Regional Variations: Responses revealed subtle but meaningful regional differences. Employers in Western Canada expressed greater optimism regarding workforce stability and growth, whereas those in Ontario and Quebec were more cautious, often linking uncertainty to supply-chain disruptions and tariff impacts.

Sectoral Insights

Manufacturing and Transportation: These sectors were most directly affected by trade tariffs, reporting short-term uncertainty, reduced investment, and heightened planning challenges. However, employers in both sectors remained optimistic about maintaining operations and retaining staff in the near term.

Energy and Resources: Firms in energy and resource-based industries reported a stable outlook, though many noted ongoing challenges related to skills availability and succession planning as older workers retire.

Construction and Green Building: Employers in construction and the green building sector continued to face acute shortages of skilled tradespeople, especially in supervisory and technical roles. These gaps risk delaying key infrastructure and sustainability projects.

Tourism and Service Industries: While still recovering from previous years of volatility, employers in tourism and hospitality reported gradual stabilization, citing improving consumer demand but persistent hiring challenges in seasonal and entry-level positions.

Emerging Themes

1. Resilience and Adaptability: Employers demonstrated confidence in navigating economic challenges, supported by diversified operations and adaptable workforce strategies.

2. Structural Labour Market Gaps: The shortages identified are not isolated — they cut across sectors, indicating systemic issues in Canada's skills pipeline that require long-term, coordinated responses.

3. The Need for Timely, Granular Intelligence: The survey confirmed that rapid data collection can capture emerging workforce pressures months before they are reflected in official statistics. This capacity for early signal detection is invaluable for policymakers and educators seeking to act proactively.

Implications for Policy and Practice

The findings underscore the importance of continued investment in real-time, employer-driven intelligence to guide workforce planning and policy design. Early signals from the *Workforce Pulse* can help governments and education partners:

- Target training and apprenticeship programs toward occupations with acute shortages.
- Support workforce mobility and reskilling in sectors exposed to economic volatility.
- Prioritize digital, automation, and logistics skills development in response to emerging employer needs.
- Leverage collaborative LMI models, like the *Workforce Pulse*, to maintain ongoing feedback loops between employers, policymakers, and educators.

Together, these findings reinforce the need for a coordinated national response to structural workforce challenges — one that integrates employer perspectives, regional realities, and sectoral expertise into a single, agile intelligence system.

Impact, Outcomes and Learnings

The *Workforce Pulse* project achieved meaningful impact at both the operational and system levels. Beyond delivering high-quality labour market intelligence, the initiative reshaped how sectoral partners collaborate, how intelligence is collected, and how workforce insights can inform timely policy and program decisions.

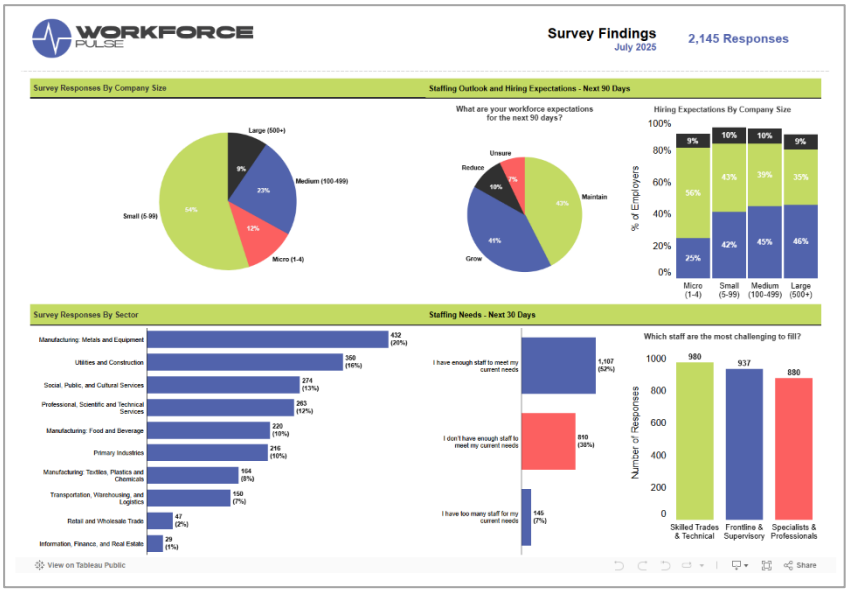
Strengthening Canada's Labour Market Intelligence Ecosystem

The project successfully demonstrated that Canada's labour market intelligence (LMI) system can operate with greater speed, coordination, and inclusivity. By aligning fourteen national organizations under a unified research framework, *Workforce Pulse* introduced a new collaborative model for real-time LMI generation — one that bridges the gap between sectoral expertise and national insight.

The rapid turnaround from survey design to analysis — less than three months — illustrated that agile, cross-sector data collection is both achievable and highly valuable. The project provided a proof of concept for how employer-driven LMI can complement official Statistics Canada data, delivering actionable intelligence to policymakers and educators in near real time.

Policy and Program Influence

Insights from the *Workforce Pulse* have already informed discussions among federal and provincial stakeholders on workforce planning, skills development, and sectoral support programs. The findings on employer resilience, structural skills shortages, and regional workforce differences were shared with governments, sector councils, and educational institutions as early signals of labour market trends.



By providing a credible evidence base during a period of economic volatility, the initiative helped policy actors identify where short-term interventions (e.g., targeted training, retention supports) could complement longer-term strategies for upskilling and workforce mobility.

Building Capacity Among Partners

The project also produced tangible organizational benefits. Participating partners reported strengthened research and analytical capacity, improved data collection processes, and enhanced collaboration across sectors. Shared survey tools, standardized questions, and consistent analysis methods provided a replicable framework that partners can now apply within their own networks.

In many cases, organizations that traditionally focused on sector-specific intelligence are now integrating cross-sector data into their internal reporting and stakeholder engagement. This marks an important step toward a more connected and coherent LMI system for Canada.

Advancing a Culture of Collaboration

Perhaps the most significant impact of *Workforce Pulse* lies in the relationships it built. The project fostered trust, communication, and shared ownership across organizations that had historically operated independently. The governance and technical structures developed under this initiative have established a foundation for long-term, sustained collaboration among partners.

Several partners have already expressed interest in expanding joint research initiatives, sharing data infrastructure, and co-developing insights on emerging workforce challenges. This momentum reflects a cultural shift — from isolated information gathering to coordinated intelligence generation — that will strengthen the entire skills and workforce ecosystem.

Laying the Groundwork for Sustainability

All partners have agreed to continue their collaboration through a second national survey in Fall 2025, supported through in-kind contributions. Plans are underway to formalize the network as a standing rapid-response LMI collaboration, ensuring that this model endures beyond project funding.

By proving that collaboration at this scale is achievable, efficient, and impactful, *Workforce Pulse* has set a new benchmark for how Canada's workforce data can be collected and used — faster, together, and in service of national resilience.

Large-Scale Collaboration is Feasible and Productive

The project proved that large-scale, multi-partner collaboration can be executed successfully when it is supported by clear governance, shared objectives, and disciplined communication. Fourteen national organizations with different mandates were able to align around a common purpose and deliver coordinated results on time. This confirmed that Canada's sectoral ecosystem has the capacity to act collectively when provided with the right structure and leadership.

Clear Purpose and Defined Roles Drive Efficiency

A well-defined objective — generating timely, employer-driven intelligence during a period of trade and economic uncertainty — helped keep partners aligned and focused. Establishing clear roles through the Steering Committee and Technical Working Group allowed for faster decision-making and reduced duplication of effort.

Knowledge Sharing Adds Value

The ability for partners to connect regularly and exchange information about their respective sectors proved to be one of the most valuable outcomes. Cross-sector discussions helped organizations identify common challenges such as skills shortages, recruitment barriers, and demographic shifts, and revealed opportunities for future joint initiatives. This improved overall awareness of how workforce issues cut across industries.

Flexibility Encourages Participation

The decision to allow partners to use either the centralized Magnet platform or their own distribution tools was essential. It respected sectoral differences while maintaining data comparability. This

flexibility increased employer participation, improved data quality, and strengthened partner engagement.

Building Capacity for Future Collaboration

Finally, the project enhanced analytical and coordination capacity among all partners. Shared tools, standardized metrics, and a unified process for analysis established a foundation for ongoing joint work. These assets will improve future data initiatives and contribute to a more connected and responsive LMI system in Canada.

What's Next

The *Workforce Pulse* initiative has established a strong foundation for continued collaboration and system-level improvement in Canada's labour-market intelligence (LMI) ecosystem. Building on the success of this pilot phase, partners have agreed to extend the work and apply the model on an ongoing basis.

Sustaining Collaboration Beyond the Project

All fourteen partner organizations have confirmed their commitment to continue working together beyond the initial FSC-funded phase. The existing governance structure — anchored by a Steering Committee and Technical Working Group — will remain in place to coordinate next steps, maintain consistency in survey design, and oversee shared communications.

Each organization will continue to contribute in-kind resources, staff time, and access to employer networks to support future survey waves. This continuity will ensure that the partnership remains operationally stable and capable of producing credible, comparable data at regular intervals.

Second National Survey – Fall 2025

Although the *Workforce Pulse* project ends October 2025, planning is underway for a second national employer survey in late Fall 2025, which will build directly on lessons learned from the first cycle. Key improvements will include:

- Refinement of survey questions to capture changes in employment outlook, hiring challenges, and skill needs.
- Enhanced data segmentation to support sector- and region-specific analysis.
- Integration of trend comparisons to measure shifts in workforce sentiment over time.
- New questions around key SME themes (AI adoption, training investment).

The second survey will serve as both a continuation and validation of the rapid-response model piloted in 2025, providing policymakers, educators, and industry leaders with a consistent, evidence-based signal on workforce trends.

Conclusion

The *Workforce Pulse* project has demonstrated that Canada's sectoral organizations can collaborate effectively to deliver timely, relevant, and coordinated labour market intelligence. In a period marked by economic uncertainty and rapid change, this initiative provided not only critical insights into employer sentiment but also a new operational model for cross-sector cooperation.

By aligning fourteen national partners under a unified framework, the project delivered measurable results: a national dataset representing more than 2,100 employers, a consistent methodology for future cycles, and a strengthened capacity to generate actionable insights..

The findings — including evidence of employer resilience, persistent skills shortages, and regional labour market variations — offer valuable input for policymakers, educators, and industry leaders seeking to address current and emerging workforce challenges. The collaboration also established a foundation for ongoing cooperation among sector councils, with a second national survey already in development and a plan to formalize the coalition as a standing rapid-response LMI network.

In practical terms, *Workforce Pulse* has shown that Canada's labour market ecosystem can operate with greater agility, coordination, and foresight. The continued evolution of this initiative will support more responsive workforce planning, more effective training investments, and a more connected national approach to understanding work and skills in Canada.

APPENDIX A: October Workforce Pulse Report

WORK FORCE PULSE



GROUNDED INSIGHT. INFORMED ACTION. A STRONGER WORKFORCE.

October 2025 Report

Canada's first Coordinated rapid-response labour market intelligence initiative

Workforce Pulse is a first-of-its-kind initiative from national sectoral and workforce development organizations. It gathered employer-driven insights about the workforce from Canada's most vital economic sectors. As Canada's first coordinated rapid-response labour market intelligence initiative, the Workforce Pulse survey—undertaken in July and August 2025—is a limited employer sentiment snapshot—a view of how businesses at that time, within participating partner networks, were navigating trade disruption and their perspectives on workforce challenges, employment barriers, and their short-term outlook at the time of the survey.

Participating Sectoral and Workforce Development Organizations:

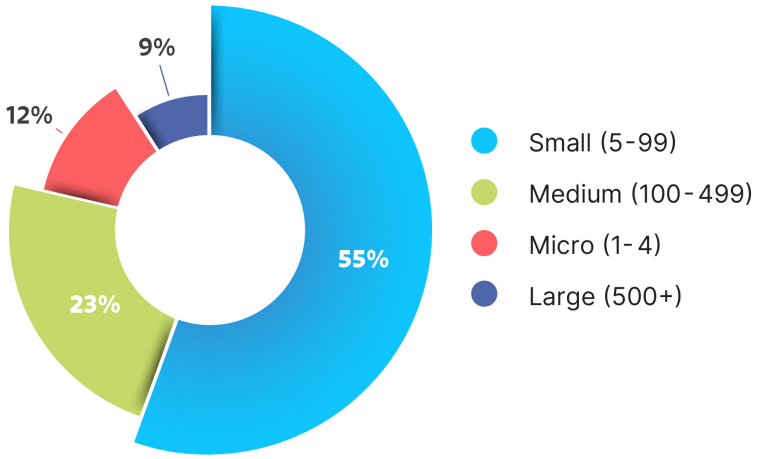
1. BioTalent Canada
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Workforce Pulse October 2025

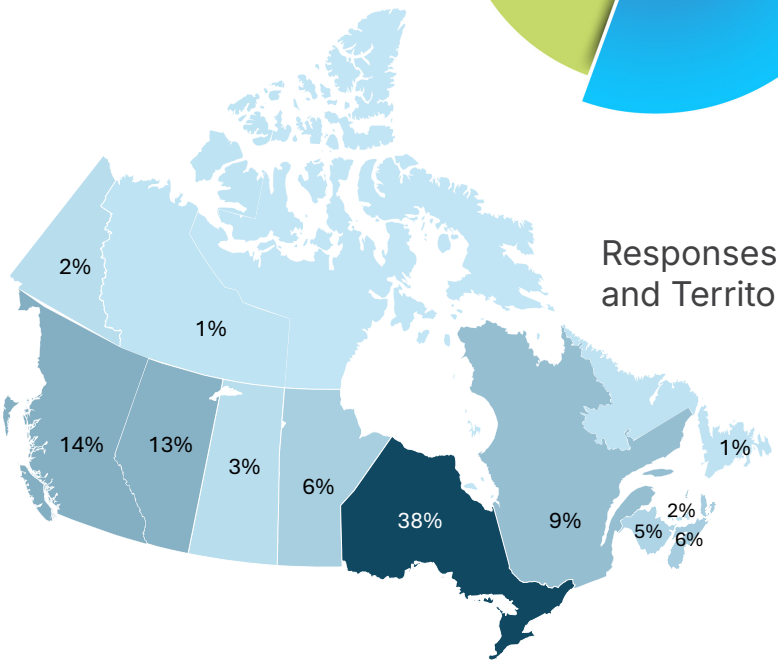
In July and August 2025, over 2,100 Canadian employers shared their perspectives through the Workforce Pulse survey, delivered in partnership with 14 national sectoral and workforce development organizations. The survey provided a limited snapshot of employer sentiment at mid-summer — how businesses were navigating trade disruptions, policy uncertainty, staffing pressures, and evolving workforce needs.

2,145
Survey Responses

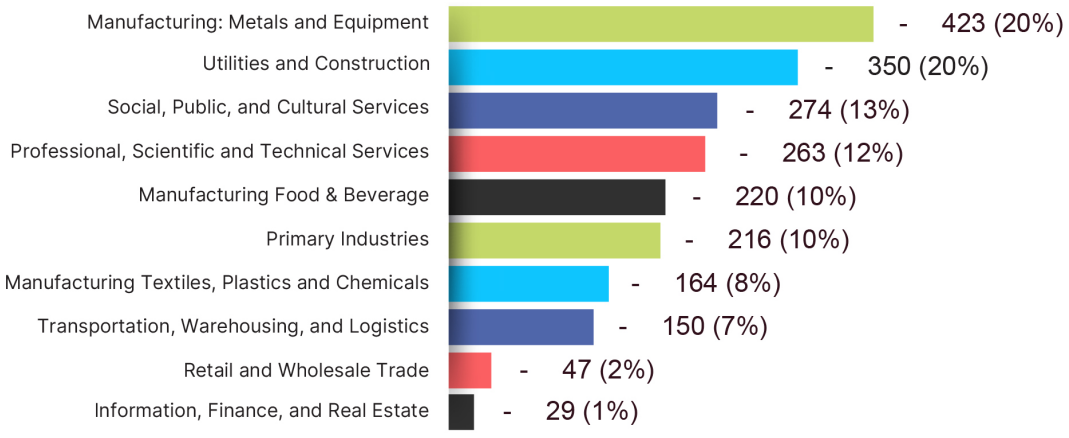
Company Size



Responses by Province and Territory



Sector Breakdown



Stable Labour Outlook, But Employers Struggling to Fill Critical Roles Across Sectors

More than 2,100 Canadian employers sent a clear message: despite trade frictions, policy uncertainty, and rising costs, significant job cuts are not on the horizon. Fewer than 10 per cent anticipated reducing staff in the next three months, while the vast majority expected to maintain or even expand their workforce.

Behind the stability, however, employers flagged vulnerabilities. Labour shortages were structural and across every sector, from construction and manufacturing to agriculture, energy, and tourism. Skilled trades, technical, professional, and supervisory roles were consistently in short supply, highlighting a mismatch between the skills available and the skills required in current and forecasted positions.

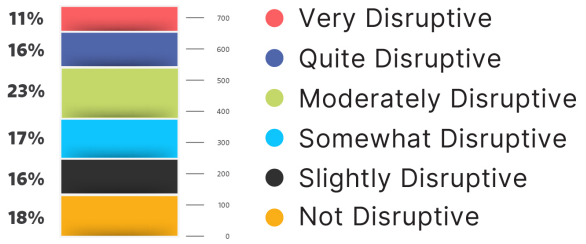
Workforce Pulse findings reflected both similar cross-sectoral themes and sector-specific differences:

- **Uncertainty dominated.** Employers pointed to tariffs, government policies, lending conditions, global market dynamics, and persistent recruitment and retention challenges as their primary concerns.

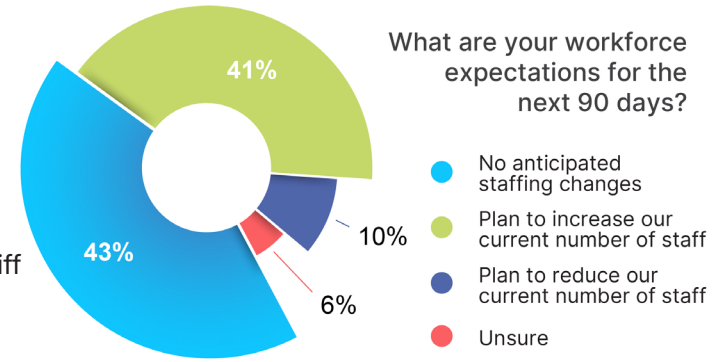
- **Impacts varied across industries.** Manufacturing, construction, transportation, and retail — all highly reliant on global supply chains — reported the sharpest disruption and workforce strain. Less tariff-exposed industries such as mining, energy, and electricity reported relative stability but still faced labour shortages.

- **Labour shortages across all sectors.** Employers in every industry reported difficulty recruiting skilled trades, frontline, supervisory, and specialist staff. These shortages are across sectors — construction, manufacturing, agriculture, tourism, energy, and environmental services. Many were compounded by tariff uncertainty and project unpredictability, underscoring that shortages were not isolated but across the board, suggesting a systemic skills mismatch between labour supply and labour demand.

Have the U.S. Tariffs or Canada's imposition of retaliatory tariffs disrupted your business?



What are your workforce expectations for the next 90 days?



- **In tariff-exposed sectors, workforce planning was reactive rather than strategic.** Rising costs, supply chain disruptions, and demand uncertainty left employers in industries such as manufacturing and transportation responding with short-term adjustments rather than long-term planning. Tariff pressures exacerbated existing vulnerabilities, leading to cautious investment and fragmented workforce strategies.

- **Despite these pressures, most employers expected stability or growth.** Fewer than 10% of employers anticipated staff reductions, while roughly eight in ten expected to maintain or expand their workforce over the next 90 days. This theme of cautious stability ran across sectors, even where disruption and shortages were most acute.

The late Summer 2025 Workforce Pulse captured an important early signal — that Canada's labour market was resilient but stretched — defined by broad-based labour shortages, sector-specific vulnerabilities, and a reliance on short-term planning. It highlights a mismatch between the skills available from the existing talent pool and the skills required in open (and forecast to open) positions. These results, confirmed by employers, are now showing up in official labour market data. The Statistics Canada August 2025 labour market data, published in September 2025, confirmed that the instability flagged by employers earlier in the summer was already materializing nationally, underscoring the need for targeted workforce strategies, including investments in training pipelines, sector-specific recruitment and retention supports, and policy measures that address both domestic skill shortages and external shocks. Without such interventions, the strain on Canada's workforce will deepen as the economy slows, leaving employers less able to adapt and workers more exposed to volatility.

It is relevant to note the importance of this Pulse Survey for early signals of employer sentiment, reinforcing the importance of timely intelligence, combined with the workforce expertise of organizations specializing in their sectors, to guide workforce development and policy responses. The coalition of partners has agreed to conduct a late Fall 2025 survey to follow up on these findings to determine how sentiment has changed and is forecast to change. This survey is anticipated for release in Fall 2025.

Sector Highlights

The following list highlights each sector and the impact of the current economic conditions on that sector. The list is organized by tariff impact and then alphabetically by organization, which provides specialized insights unique to the sector in question.

Excellence in Manufacturing Consortium

Sector: Manufacturing
Tariff Impact: Very disruptive
Key Workforce Challenges:
Skilled trades/technical, general labour and supervisory positions are the most challenging to fill.
Other Observations:
Uncertainty is hindering investments and operational decisions, making planning more reactive and less strategic.

Trucking HR Canada

Sector: Transportation and Warehousing
Tariff Impact: Very disruptive
Key Workforce Challenges:
Uncertainty over the tariffs has an immediate impact on employers, especially those who move goods across borders. This has resulted in uncertainty around workload, which has made it difficult for employers to plan for workforce needs.
Other Observations:
Truck drivers remain the most challenging position to fill for trucking and logistics employers despite the challenges imposed by tariffs. The sector remains focused on hiring and retaining staff, along with increasing productivity and streamlining supply chain challenges.

Canadian Council for Aviation and Aerospace

Sector: Aviation and Aerospace
Tariff Impact: Very to somewhat disruptive
Key Workforce Challenges:
75% of respondents indicated skilled trades/technical and professional/specialists are their greatest priority to hire. The remaining unfilled roles are in general labour/frontline/production/customer service.
Other Observations:
Skilled, experienced licensed aircraft engineers are a high priority for most transport respondents.

Canadian Skills Training and Employment Coalition

Sector: Metals & Equipment Manufacturing & Other Industrial Sectors
Tariff Impact: Moderately to quite disruptive
Key Workforce Challenges:
Skilled trades and technical roles remain the hardest to fill, followed by frontline production and professional specialists. Workforce expectations lean toward staff increases, yet uncertainty is driven by workload/project issues and recruitment/retention challenges.
Other Observations:
Despite tariff pressures, half of employers report adequate staffing, but over a third still face shortages. Raising productivity/streamlining supply chains, as well as hiring/retaining staff, are top organizational needs, highlighting both short-term workforce constraints and longer-term competitiveness pressures.

Food Processing Skills Canada

Sector: Food and Beverage Manufacturing

Tariff Impact: Disruptive (though varies by subsector) 71% of respondents were affected by tariffs.

Key Workforce Challenges:

Labour shortages, 25% of respondents indicated they did not have enough staff to meet their current needs. Frontline workers, along with trades and technical positions, are in high demand.

Other Observations:

Employers cited gaps in frontline, trades, and technical positions. Tariff impacts varied by subsector, with rising costs, tighter access to capital, and pauses on hiring and investment. Many products remained CUSMA-compliant, but tariffs from China and Canadian counter-measures added further disruption.

BuildForce Canada

Sector: Construction

Tariff Impact: Somewhat disruptive

Key Workforce Challenges:

Access to skilled labour and management/supervisory positions. Most respondents were still hiring throughout the survey period.

Other Observations:

The ongoing trade friction with the United States has eroded consumer confidence, resulting in lower overall investment, particularly in the residential sector.

Canadian Agricultural Human Resource Council

Sector: Agriculture

Tariff Impact: Somewhat disruptive

Key Workforce Challenges:

Farm labour and supervisor positions are challenging to fill. The need for skilled labour and technicians is also a challenge across the sector.

Other Observations:

Producers are concerned about increased labour costs and their effect on budgets. Producers are actively seeking employees to avoid production delays or reductions.

Canada Green Building Council

Sector: Green Building

Tariff Impact: Somewhat disruptive

Key Workforce Challenges:

Results reflect the building sector's ongoing skilled labour shortage – likely driven by retirements and a slowdown in new entrants.

Other Observations:

The need to recruit additional workers was highlighted by nearly all industry respondents, demonstrating the need to increase recruitment. Some respondents also noted the need for skills development.

Tourism HR Canada

Sector: Tourism

Tariff Impact: Somewhat disruptive

Key Workforce Challenges:

Frontline workers and management/supervisory positions are driving labour challenges.

Other Observations:

Sector-level tariff impacts were unevenly felt across tourism, but those with the highest levels of disruption also had incidences of staffing shortages.

Environmental Careers Organization of Canada

Sector: Environmental Consulting and Not-For-Profits

Tariff Impact: Slightly to somewhat disruptive

Key Workforce Challenges:

Two-thirds of environmental consulting firms and half of not-for-profits reported that professionals/specialists are the most difficult roles to fill.

Other Observations:

Workforce planning has been primarily impacted by workload or project uncertainty (environmental consulting) and budget constraints (not-for-profit organizations).

Careers in Energy, a division of Energy Safety Canada

Sector: Energy Exploration, Production and Energy Services

Tariff Impact: Slightly disruptive

Key Workforce Challenges:

Skilled trades/technical, general labour and supervisory positions are the most challenging to fill.

Other Observations:

Nearly 9 in 10 employers expect to maintain or grow staff over the next 90 days. Workload or project uncertainty is the primary workforce-related concern for 40% of employers over the next 90 days.

Electricity Human Resources Canada

Sector: Electricity

Tariff Impact: Slightly disruptive

Key Workforce Challenges:

Respondents report that workload and project uncertainties are their primary workforce-related uncertainties.

Other Observations:

Most respondents expect to either maintain or increase their staffing levels in the near future, suggesting that the tariffs are unlikely to directly affect the electricity sector. However, the broader economic impact of the tariffs could lead to indirect effects over time.

BioTalent Canada

Sector: Bio-economy

Tariff Impact: Slightly disruptive

Key Workforce Challenges:

Respondents identified professional/specialist roles as the most difficult to fill (48%), with additional challenges in technical trades, sales/marketing, and leadership roles.

Other Observations:

Despite concerns related to financial support and budget constraints affecting workforce planning, many organizations plan to increase their staff (44%), while nearly as many anticipate no changes. Only a small percentage expect reductions.

Mining Industry Human Resources Council

Sector: Mining

Tariff Impact: Not disruptive

Key Workforce Challenges:

Skilled trades/technical occupations are the most challenging to fill. The immediate focus for most organizations is hiring and retaining staff.

Other Observations:

To date, mining companies participating in the survey have reported little impact from tariffs, regardless of their size.

About the Workforce Pulse Survey

The Workforce Pulse survey was conducted by 14 national sectoral and workforce development organizations to provide a rapid-response snapshot of employer sentiment on staffing, hiring, and workforce challenges in the context of ongoing trade and economic disruptions. The pulse survey included basic questions to gauge respondents' current human resources situation, their expectations for the next 90 days and the extent to which their organization is affected by the tariffs imposed by the United States.

Survey Questions

- All 14 partner surveys applied the same seven core questions covering staffing levels, hiring expectations, workforce needs, and tariff impacts.
- Partners had the option to include two supplemental questions:
    - "What is your organization's most important need this month?"
    - "What is your organization's primary workforce-related uncertainty over the next 90 days?"

Who Responded

- Sample size: 2,145 employers.
- Business size: 12% micro (1–4 employees), 55% small (5–99), 23% medium (100–499), 9% large (500+).
- Sectors: Manufacturing (38%) and construction (16%) were the largest groups.
- Regions: Most responses came from Ontario (38%), B.C. (14%), Alberta (13%), and Quebec (9%).
- Industry mix: Goods-producing industries accounted for 64% of responses, reflecting high participation from tariff-exposed sectors.

How Data Was Collected

- Timing: July 8 to August 4, 2025.
- Method: Online survey in English and French, distributed via partner networks, newsletters, social media, and events.
- Format: 1–3 minutes to complete; seven core questions plus optional sector-specific questions.
- Anonymity: Responses were confidential; only the first three digits of postal codes were collected.

Limitations

- Non-probability sample: Results are not representative of the entire Canadian economy and no margin of error applies.
- Sector/region variation: Some sectors and regions are better represented than others.
- Opinion-based: Perceptions of disruption differ.

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