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Project Insights Report

National Multi-Sector Workforce Pulse: Tracking Canadian Labour Disruptions in Real Time

PARTNERS
EMC Canada

LOCATIONS
Across Canada

INVESTMENT
$284,000

PUBLISHED
November 2026

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Executive Summary

Canada's labour market information system is strong in many respects, but it is not always designed to provide fast, cross-sector, employer-informed intelligence needed by policymakers, training providers, and workforce development organizations during periods of rapid disruption. This limitation became particularly important in 2025, when Canada–U.S. trade tensions and tariff-related uncertainty created new pressures for employers who were already navigating labour shortages, rising costs, supply chain disruptions, and changing workforce needs.

The National Multi-Sector Rapid Labour Market Pulse project, led by the Excellence in Manufacturing Consortium of Canada, tested whether national sectoral and workforce development organizations could work together to produce timely, coordinated labour market intelligence across multiple sectors. The initiative brought together 14 national organizations representing a broad range of industries, including manufacturing, construction, agriculture, aviation and aerospace, transportation, tourism, energy, electricity, environmental careers, mining, bio-economy, food processing, green building, and skills training and employment.

The project produced the Workforce Pulse survey, which provided a rapid snapshot of employer sentiment during a period of uncertainty. It was conducted between July 8 and August 4, 2025, with 2,145 employers responding. The survey focused on staffing levels, hiring expectations, workforce needs, and the extent to which organizations were affected by tariffs and broader economic disruption.

Survey findings suggest that Canada's labour market was resilient but stretched. Fewer than 10% of employers expected to reduce staff over the next 90 days, while most expected to maintain or increase staffing. However, employers across sectors reported persistent difficulty filling skilled trades, technical, supervisory, frontline, and specialist roles. Tariff-exposed sectors, particularly manufacturing and transportation, reported more disruption, uncertainty, and reactive workforce planning.

The project's most important contribution may be methodological and systems-oriented. It showed that rapid, cross-sector labour market intelligence is possible when organizations with trusted employer networks, sector expertise, and shared purpose coordinate their efforts. While the survey was not designed to be statistically representative of the entire Canadian economy, it offers a useful proof of concept for how Canada can complement traditional labour market data with faster employer sentiment signals during periods of economic volatility.

KEY INSIGHTS

1. A total of 2,145 employers responded to the Workforce Pulse survey, which was delivered through 14 national sectoral and workforce development organizations.

2. Across sectors, employers reported persistent shortages in skilled trades, technical, supervisory, frontline, and specialist roles, suggesting that workforce pressures were broad rather than isolated to a single industry.

3. Fewer than 10% of employers anticipated reducing staff over the upcoming 90 days, while most expected to maintain or increase staffing.

The Issue

Canada's labour market intelligence system often relies on data that are rigorous but retrospective. Official statistics, administrative data, job posting analytics, and sector-specific studies provide valuable information, but they may not always capture employer sentiment or emerging disruption quickly enough to support timely policy and program responses. During stable periods, this lag may be manageable. However, during periods of rapid economic change, delays in labour market intelligence can make it harder for policymakers, employers, training providers, and workforce development organizations to respond while conditions are evolving.

This challenge became more visible in 2025 as escalating trade tensions between Canada and the United States created uncertainty for many employers. Tariffs, retaliatory measures, supply chain pressures, and shifting demand created immediate planning challenges, particularly for sectors that rely heavily on cross-border trade or globally integrated supply chains. At the same time, these disruptions interacted with pre-existing workforce pressures, including shortages in skilled trades, technical roles, supervisory positions, and other occupations that are central to Canada's productive capacity.

The issue was not only that better data was needed. It was also that existing labour market information tends to be organized by sector, with each sectoral organization collecting and interpreting data within its own networks. While this sector-specific knowledge is valuable, when it remains siloed, it is difficult to identify patterns across the economy or to compare how disruptions affect different sectors, regions, and firm sizes.



What We Investigated

The Workforce Pulse project responded to this gap by testing whether a rapid, coordinated, multi-sector labour market intelligence (LMI) model could provide useful employer-informed evidence during a fast-moving period of economic disruption. The initiative was designed as a proof of concept for a more agile LMI approach, rather than as a traditional research study or a statistically representative labour force survey.

The Workforce Pulse conducted employer surveys through 14 national sectoral and workforce development organizations. These organizations represented manufacturing, construction, agriculture, aviation and aerospace, transportation, tourism, energy, electricity, environmental careers, mining, bio-economy, food processing, green building, and broader skills training and employment interests.

The project explored five main questions:

1. What employer-driven indicators, such as layoffs, reduced orders, staffing expectations, or tariff pressures, best reflect immediate labour market disruptions?
2. How do disruptions vary by sector, region, and company size?
3. What emerging skill and workforce mobility needs arise during economic shocks, and how do these differ across sectors?
4. How effectively can a staged or monthly multi-sector LMI approach provide more timely insights than traditional methods?
5. What can be learned from implementing a coordinated cross-sector collaboration among national organizations?

The survey was conducted between July 8 and August 4, 2025, in English and French, through partner networks, newsletters, social media, and events. It was designed to be brief, taking approximately one to three minutes to complete. All surveys included seven core questions on staffing, hiring expectations, workforce needs, and tariff impacts, with optional supplemental questions on organizations' most important current needs and primary workforce-related uncertainty over the next 90 days.

The project also tested a collaborative operating model. EMC coordinated the project; participating organizations supported design, distribution, analysis, and knowledge mobilization; and partners used shared governance structures and data-sharing protocols to align the work. This collaborative design was important because the project sought to learn not only what employers were experiencing, but also whether sectoral organizations could generate timely intelligence together.

✔ What We're Learning

The project showed that large-scale, cross-sector LMI collaboration is feasible

One of the clearest findings is that national sectoral and workforce development organizations can coordinate rapidly around a shared labour market intelligence objective. The initiative brought together 14 organizations, many of which had not previously collaborated this way, to produce a national employer survey within a compressed timeline. This matters because the labour market challenges facing Canada do not always fit neatly within individual sector boundaries. The project suggests that, when there is a clear purpose, shared governance, and enough flexibility for sector-specific adaptation, collaboration can produce broader intelligence than any one organization could generate alone.

The Workforce Pulse reached a large employer sample, but results should be interpreted as a snapshot

The survey received 2,145 responses from employers across Canada. Most responses came from Ontario, British Columbia, Alberta, and Quebec. Goods-producing industries accounted for a large share of responses. Most respondents were small businesses, followed by medium, micro, and large firms. This breadth gave the project a useful view into employer sentiment across partner networks. However, the survey used a non-probability sample, meaning the results do not represent the Canadian economy and no margin of error applies. The findings are best understood as rapid, employer-informed signals that complement, rather than replace, official labour market data.

Employers reported stability in staffing expectations, despite uncertainty

A notable finding was that fewer than 10% of employers expected to reduce staff over the next 90 days. Most expected to maintain or increase staffing. This suggests that many employers were not responding to trade tensions and policy uncertainty through immediate job cuts. At the same time, this stability should not be interpreted as the absence of pressure. Employers were still navigating rising costs, supply chain uncertainty, tariff exposure, recruitment challenges, and shifting demand. The picture that emerges is one of cautious stability rather than strong confidence.

Labour shortages were broad and persistent across sectors

Employers across sectors reported difficulty filling critical roles, particularly skilled trades, technical positions, supervisory roles, frontline positions, and professional or specialist occupations. These challenges appeared in sectors as varied as manufacturing, construction, agriculture, tourism, energy, environmental services, aviation and aerospace, and mining. This consistency suggests that Canada’s skills challenges are not limited to a few industries but rather reflect a broader mismatch between labour supply and the skills required in current and anticipated roles.

Tariff-exposed sectors reported more disruption and more reactive workforce planning

Disruption was not evenly distributed across sectors. Manufacturing, transportation, construction, and some retail and supply-chain-linked sectors reported sharper disruption and workforce strain. In these sectors, tariff pressures, rising costs, project uncertainty, and supply chain challenges made workforce planning more reactive and less strategic. By comparison, sectors such as mining, electricity, and parts of the energy sector reported less direct disruption from tariffs, but still faced workforce challenges. This distinction suggests that policy and training responses should not assume that all sectors experience the same type or intensity of disruption.

Rapid employer sentiment provides early signals before official data sources fully capture change

The Workforce Pulse showed the value of collecting employer sentiment within weeks rather than months. Some of the instability flagged by employers in the summer was later reflected in official labour market data. This suggests that pulse-style LMI can serve as an early warning tool, helping policymakers and workforce development actors identify emerging risks before they appear fully in traditional, more rigorous datasets. The value of this approach is that it is faster, more targeted, and grounded in the immediate experience of employers.

The dual-track survey model balanced consistency with relevance

A key design feature was the use of core questions across all partners, combined with optional sector-specific questions. This created enough consistency to support cross-sector analysis while allowing participating organizations to preserve relevance for their own employer networks. This flexibility appears to have helped build partner ownership and trust. It also points to a broader lesson for collaborative research: standardization is useful, but it should not be so rigid that sector-specific expertise and context are lost.

Equity, Diversity, Inclusion & Reconciliation (EDI&R) considerations were limited by the rapid design, but remain important for future pulses

The survey was not designed to collect direct demographic data on workers or employers, largely because it needed to be short and focused. As a result, the project could not directly assess how disruption affected equity-deserving groups. However, the proposal identified an intention to review regional and occupational trends through an EDI&R lens where possible and to document opportunities to incorporate stronger EDI&R considerations into future LMI initiatives. This is an important limitation and opportunity, especially because labour market disruptions often have uneven effects across workers, regions, occupations, and communities.

Why It Matters

The Workforce Pulse project matters because it tested a different way of producing labour market intelligence. Rather than relying only on retrospective data or separate sector-specific studies, the project brought together national sectoral and workforce development organizations to generate rapid, employer-informed evidence during a period of uncertainty. This is important for a labour market system that increasingly needs to respond to shocks that can move faster than traditional research and reporting timelines.

For policymakers, the project provides a model for generating early signals that can inform targeted responses. During a period of tariff uncertainty, the finding that most employers expected to maintain or increase staffing was reassuring, but it did not mean that no intervention was needed. The same survey showed widespread skills shortages and sector-specific disruptions that may require targeted training, retention, recruitment, supply-chain, and business support measures. The value of this type of rapid LMI is that it can help identify where pressure is emerging and where policy attention may be most urgently needed.

For training providers and workforce development organizations, the findings reinforce the importance of building training pipelines for roles that remain difficult to fill across multiple sectors. Skilled trades, technical occupations, supervisory roles, frontline positions, and professional or specialist jobs appeared repeatedly across the data. This suggests that training responses should not only focus on the sectors most affected by tariffs, but also on cross-cutting occupational shortages that constrain multiple parts of the economy. It also suggests the need for more flexible retraining and mobility supports that can help workers move across sectors when disruption affects particular industries.



State of Skills: Better Labour Market Transitions for Mid-Career Workers

Supporting displaced mid-career workers requires a clear understanding of the barriers and difficulties they face, and it should also seek to build on highly valued skills developed through years of work and life experience.

Read Thematic Report

For sectoral organizations, the project shows the value of collaboration without erasing sector-specific expertise. Each partner brought trusted employer relationships, knowledge of sector dynamics, and communication channels that helped the initiative reach employers quickly. At the same time, the shared structure made it possible to identify cross-sector patterns. This combination is important because Canada's labour market challenges are both sector-specific and system-wide. A single-sector view can miss broader patterns, while a general economy-wide view can miss important sectoral detail. The Workforce Pulse survey suggests that coordinated sectoral collaboration can bridge these two levels of analysis.

The project also matters for the future of LMI infrastructure. A standing rapid-response labour market intelligence network could complement official data by providing faster, more frequent, and more employer-proximate signals. Such a network would not replace Statistics Canada or other formal data systems, nor should it be expected to meet the same standards of representativeness, but it would provide timely signals, sector interpretation, and a mechanism for quickly mobilizing employer networks when disruptions occur.

There are also important cautions. Because the survey used a non-probability sample, results should not be generalized to the entire Canadian economy without qualification. Because the survey prioritized speed and brevity, it could not collect detailed demographic data or assess impacts on equity-deserving groups. Because partners used their own networks, some sectors and regions were better represented than others. These limitations do not weaken the proof of concept, but they do clarify how the model should be used: as a rapid intelligence tool that complements, rather than substitutes for, more comprehensive labour market research.

Finally, the project has implications for how funders support collaboration. Cross-sector work is often difficult because it requires coordination, trust, shared processes, and alignment across organizations with different mandates and timelines. The Workforce Pulse survey shows that, with a clear purpose and practical structure, collaboration can produce timely outputs and create a foundation for future work. In that sense, one of the project's most important outcomes was not only the survey report itself, but the collaborative capacity that was built among participating organizations.

What's Next

The Workforce Pulse collaboration may continue beyond the FSC-funded project. Participating organizations have indicated interest in conducting a follow-up pulse and in exploring whether the model can become a standing national rapid-response labour market intelligence network.

Future work could build on the initial proof of concept in several ways. First, the survey design could be refined to improve comparability across sectors and increase participation in underrepresented regions and industries. Second, future pulses could incorporate stronger EDI&R considerations, including ways to understand how disruptions affect different groups of workers, occupations, communities, or regions. Third, the collaboration could explore more systematic integration of employer sentiment data with job posting analytics, official statistics, and other complementary data sources.

If sustained, the Workforce Pulse model could become a useful addition to Canada's skills intelligence infrastructure as a fast, more flexible tool for understanding employer sentiment and workforce pressures during periods of disruption.

Have questions about our work? Do you need access to a report in English or French? Please contact communications@fsc-ccf.ca.

How to Cite This Report

Noumi, C. (2025). Project Insights Report: National Multi-Sector Workforce Pulse: Tracking Canadian Labour Disruptions in Real Time, EMC Canada. Toronto: Future Skills Centre. https://fsc-ccf.ca/research/labour-market-pulse/

Funded by the Government of Canada's Future Skills Program

Canada

National Multi-Sector Workforce Pulse: Tracking Canadian Labour Disruptions in Real Time is funded by the Government of Canada's Future Skills Program. The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada.

The Future Skills Centre acknowledges that the Anishinaabe, Mississaugas and Haudenosaunee share a special relationship to the 'Dish With One Spoon Territory,' where our office is located, bound to share and protect the land. As a pan-Canadian initiative, FSC operates on the traditional territory of many Indigenous nations across Turtle Island, the name given to the North American continent by some Indigenous peoples. We are grateful for the opportunity to work in this territory and commit ourselves to learning about our shared history and doing our part towards reconciliation.

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