

# POST PANDEMIC ECONOMIC SCENARIOS

## *Local Labour Action Plan*

## MARCH 2021



## ACKNOWLEDGEMENTS

The Four County Labour Market Planning Board (Planning Board) is a community-directed, not-for-profit organization that specializes in providing labour market information for Bruce, Grey, Huron, and Perth counties. This report reflects input received from local employers and residents regarding the labour market situation in the four county area.

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The material contained in this report is drawn from a variety of sources considered to be reliable. We make no representation or warranty, explicit or implied, as to its accuracy or completeness. In providing this material, the Planning Board does not assume any responsibility or liability.

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## PROJECT OVERVIEW

This document is intended to broaden and deepen conversations about next steps in addressing the present and future economic and social impacts of the COVID-19 pandemic in the **four county region (Bruce County, Grey County, Huron County, and Perth County)**. It provides:

1. An overview of the recovery timeline, describing four stages of recovery that are our conceptual basis for how the economy as a whole, individual sectors, and individual businesses will progress through the crisis.
2. A summary of the past, describing issues since the start of the pandemic that are not relevant to the current situation but provide important historical context.
3. An overview of the present, describing the impacts that have already been felt, impacts we can anticipate, initiatives that have already been launched, and other ideas for potential actions that are being explored in the region.
4. An overview of the future, describing a set of preliminary socio-economic scenarios that have been developed by the Four County Labour Market Planning Board and its community stakeholders.
5. Recommendations and the preliminary design of potential labour market and workforce initiatives up to June 2022.

Using this current status overview and this set of preliminary future scenarios, the Four County Labour Market Planning Board and its members, businesses, and community leaders may continue discussions to identify initiatives that can be put in place today, and in future scenarios.

The next step in developing strategic plans will be to elaborate these scenarios and their indicators further to account for impacts on specific industries, and then to identify scenario-based recommendations for actions to overcome the challenges and identify opportunities that each of these scenarios could present to our community.

## SCENARIO-BASED PLANNING TIMELINE

The global COVID-19 crisis has been unprecedented and changed everything in an instant. Social distancing, face covering, remote working, and other key factors, have become the new way of living and working. It still remains unclear how long the pandemic will last and whether it will further change the fundamentals of our economy. Many different versions of the future lay ahead and we do not know what kinds of realities might unfold. There are a wide range of possibilities in play and we know that it's never good to focus on one single, expected future. Our scenario planning project identifies four probable future scenarios, explores what impacts they could have and implications of how various stakeholders might respond. It helps local employers and organizations begin to think and talk about the future in a structured and productive way so



that they can make present-day decisions in order to better prepare themselves for the future.

There are several **benefits** of scenario-based planning:

- Provides frameworks for managing the unprecedented uncertainty posed by COVID-19.
- Supports proactive decision-making by identifying challenges, opportunities, and potential actions well in advance.
- Encourages a holistic and collaborative approach to planning that manages system complexity and ensures the COVID-19 Economic Recovery Plans will be robust, comprehensive, and capable of withstanding all future scenarios.

The scenario planning strategy requires **several steps**. They are:

1. Identify key factors
2. Identify critical uncertainties and scenario matrix
3. Build out scenarios and action plans with stakeholders
4. Revise and validate scenarios and action plans
5. Publish and incorporate into Economic Recovery Plan
6. Track scenario indicators and continuously adapt the plan

During September-October of 2020, the Four County Labour Market Planning Board (FCLMPB) reached to forty-four potential local stakeholders and asked them to fill out the Key Factor Survey. Twenty-four of them finished the survey and chose the factors that they think were most uncertain. After analyzing the survey and internal discussions, FCLMPB identified the two critical uncertainties that will influence the economic recovery in the four county area. The uncertainties were: the impact of the pandemic and the impact of teleworking. With these two critical uncertainties, FCLMPB built out four probable scenarios.

During October-November of 2020, the same group of stakeholders were invited for focus group sessions on scenario discussions. In total, twenty-four stakeholders from Agriculture, Economic Development, Education, Employment Services, Health, Labour Unions, Manufacturing and Service sectors joined our focus group sessions or one-on-one conversations and shared their insights. Together, they discussed opportunities and challenges that could emerge from each probable scenario and provided us with potential recommendations. The list of participants from the focus group sessions is attached in Appendix A.

## HOW TO USE THIS REPORT

This report provides stakeholders and project partners with tools to be better equipped to strategically plan. It will assist decision makers to lead changes that proactively address challenges and opportunities that arise through four probable future scenarios and as the COVID-19 situation evolves. Government, economic development organizations, community stakeholders, educators, employers, employees, and jobseekers can use this report as part of their strategic planning and decision making process related to workforce, training, jobs, and careers.

Scenarios tell a story of what the future could look like under certain circumstances. They are a world in which different, unexpected outcomes are possible. They are not policy choices but an opportunity to consider how you would react if this future scenario were to occur.

In each of the four scenarios, discuss how your organization would be impacted if this scenario occurred. Consider how you would manage the current and projected skills shortages. Plan how your organization would navigate through the React, Recover, and Resiliency stages. **Questions to consider** are:

- What stage are you currently in?
- What programs and supports do you need to support you in this new reality?
- How would you mitigate the problems in each of these scenarios?
- What are the challenges?
- Where are the opportunities?
- What recommendations will help your organization?

The report's accompanying dashboard includes pertinent labour market intelligence that will **help** decision makers:

- Gain knowledge, review evidence, and examine community-supported recommendations for actions that improve labour market conditions across Southwestern Ontario.
- Identify current and projected skills shortages resulting from the economic impacts and government investments in healthcare, manufacturing, construction, public administration and other industries specific to the four county region.
- Identify current and emerging issues impacting labour market adjustment in key sectors including Accommodation and Food Services, Manufacturing, and Arts, Culture and Recreation.
- Identify areas for potential value-added growth and innovation that emerge as a result of the COVID-19 pandemic and its restructuring of consumer and business needs.
- Recommend potential initiatives that will bridge the gaps between labour market supply and demand up to June, 2022.



Some of the scenarios discussed may seem unlikely. However, it is important to think outside of the box and consider how your organization would react. If anyone told any of us in November 2019 that there would be a highly contagious, deadly airborne virus that would result in worldwide economic shutdowns, travel restrictions, stay at home orders, states of emergency, and physical distancing, no one would have believed you. A failure of imagination is not a good strategy.

The COVID-19 pandemic situation changes daily. This report is current as of March 2021 and focuses on the Stratford-Bruce Peninsula Economic Region (ER) which comprises of Bruce, Grey, Huron and Perth counties.

## RECOVERY TIMELINE

Economic recovery, for our region and for individual sectors or businesses, can be divided into four stages: REACT, RESTART, RECOVER, and RESILIENCY. They are defined as followed:

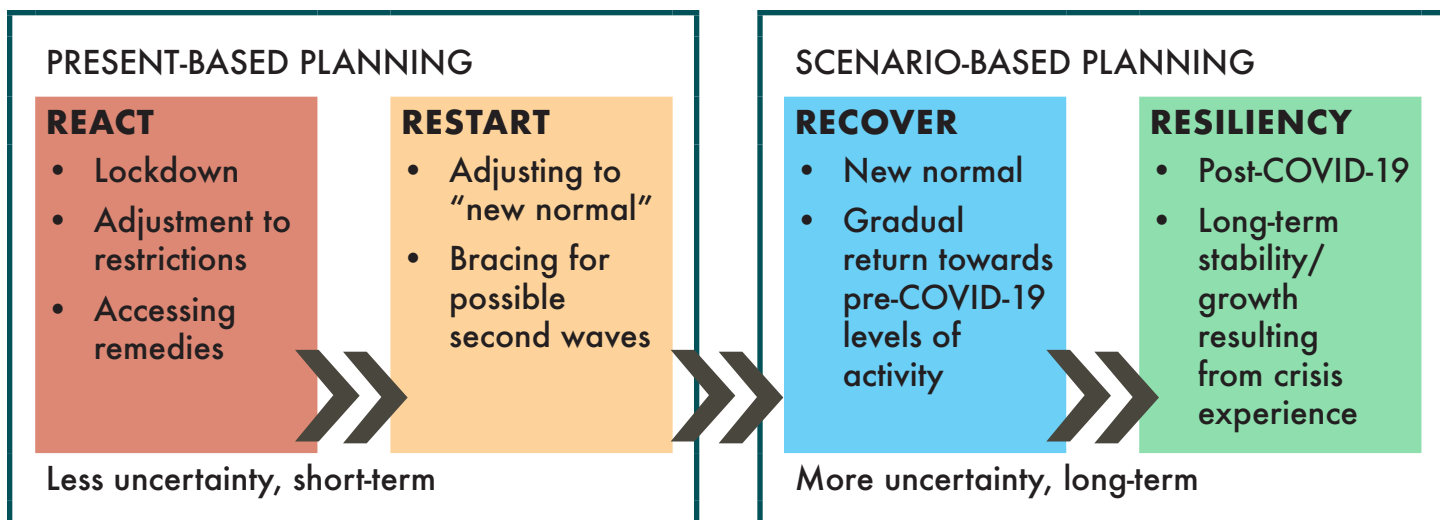
**REACT:** Adjusting to lockdown conditions and new restrictions, accessing remedies, taking short-term and reactive actions. Priority is staying afloat.

**RESTART:** Adjusting to new, more stable conditions that permit a certain level of business activity, while still relying on temporary remedies and preparing for potentially serious threats including new lockdowns. Priority is reaching a new steady state.

**RECOVER:** A new steady state, or new normal, is sustainably achieved. Depending on the sector, this may represent a return to pre-COVID-19 levels of activity. Businesses may still be dealing with the impacts of downturn in other sectors or in the economy as a whole. Priority is long-term investments and changes to business models that enable success in the new normal.

**RESILIENCY:** The benefits of investments and long-term changes made in the recovery phase are felt. Whether as a result of these changes, or the end of the COVID-19 crisis as a whole, businesses become impervious to negative impact related to COVID-19. Priority is growth beyond the COVID-19 crisis.

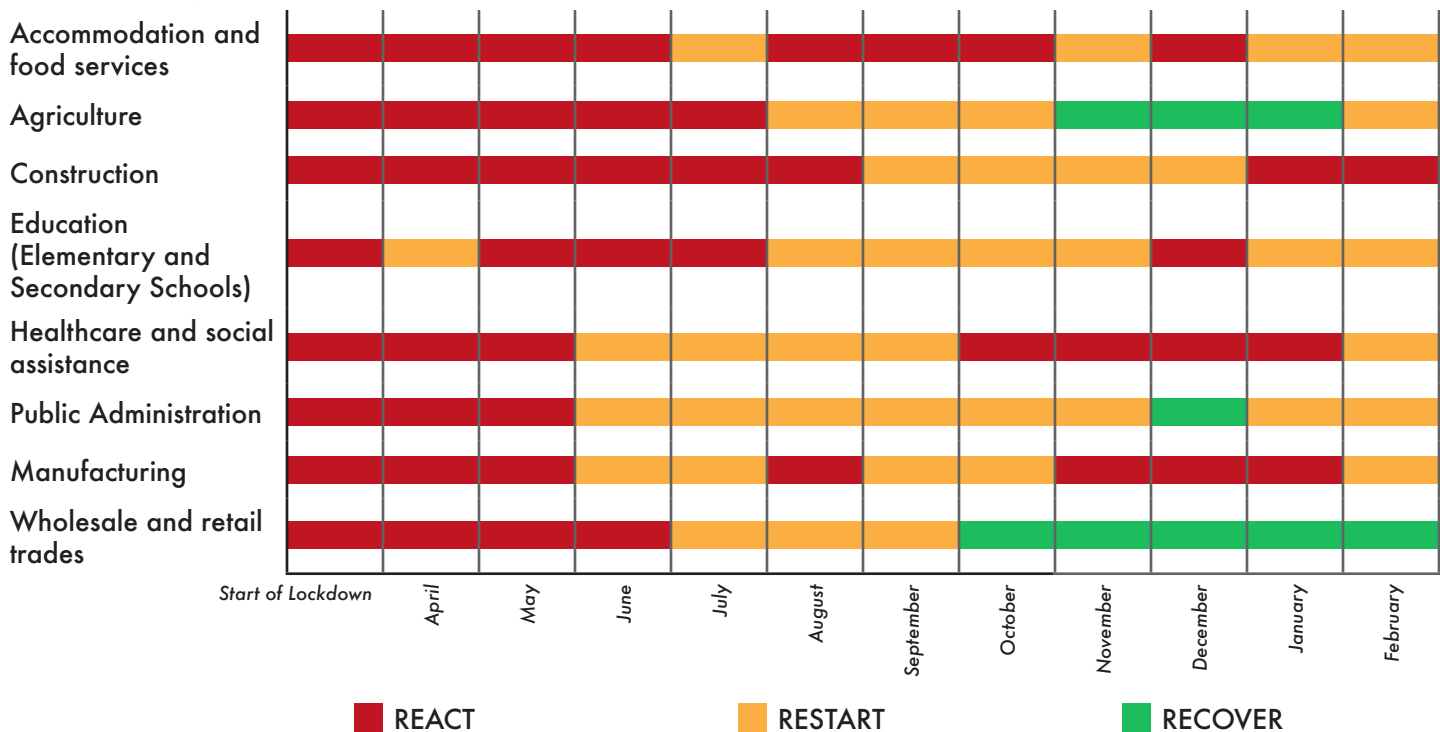
Through consultations and conversations with the FCLMPB members and community stakeholders, we have identified and acted upon recommendations for the REACT and RESTART phases, which are summarized in the next section of this document. While we continue to identify immediate challenges to overcome and opportunities to seize, the next step in developing a recovery plan is to begin planning for the RECOVER and RESILIENCY phases, which could span from today to 3+ years into the future. Continued uncertainty about the progression of the COVID-19 pandemic as well as its long-term impacts on the global economy mean that a scenario-based approach is required to plan proactively for these stages of recovery.



Not every sector will progress through these stages at the same rate. As of March of 2021, some may still be transitioning from REACT to RESTART, while others are entering the RECOVER stage. Below is a timeline of how key sectors in the four county area have progressed through the crisis to date, based on our knowledge from the Labour Force Survey (LFS) data and discussions with local industry stakeholders.

In late March of 2020, Canada implemented national lockdown as a means to combat the global COVID-19 pandemic. All sectors went into REACT stage and tried to adjust to the new condition and restrictions (see Chart 1). The employment of these sectors (i.e, Accommodation and food services, Agriculture, Construction, Education, Health care and social assistance, Public Administration, Manufacturing, and Wholesales and retail trades) decreased dramatically in March, April and May. As health restrictions began to be lifted by the provincial government in May, the rebound set in. A certain level of business activity has resumed and some sectors experienced increases in employment starting in June. We see this as a sign for the RESTART stage. In October, the focus group participants were asked about their current stage of recovery. Most of them indicated they were still in the RESTART while a few said they were transitioning into the RECOVER stage. The LFS data for October and November confirmed their statements and also provides additional details about how employment in these sectors has changed due to a resurgence of the virus in November. Starting December 26th, Ontario was again under a state of emergency and stay-at-home order with schools and non-essential businesses closed. Many affected sectors returned to REACT or RESTART stage. This persisted until the provincial health restrictions were eased in middle February. At the time of this report, all sectors went into in RESTART or RECOVER stage except Construction.

CHART 1: INDUSTRIES



Source: Statistics Canada, Labour Force Survey.

## THE PAST: The historical context of how far we have come

### IMPACTS WE HAVE ALREADY FELT

In early April, 2020, Statistics Canada reported that 3,100,000 Canadians experienced job loss or a reduction in hours due to the COVID-19 pandemic.<sup>1</sup> By June 2020, the federal government had reported that the employment of 5.5 million Canadians was impacted by COVID-19.<sup>2</sup> Locally, the Stratford-Bruce Peninsula ER saw unemployment rate rise from 5.9 percent in March to 9.8 percent in June 2020, with a corresponding decrease in the number of people employed in the region.

In order to understand the impact of COVID-19 on the local workforce, FCLMPB conducted an anonymous and confidential survey between April and June 2020. In this survey, we asked several questions regarding employment status on March 2, 2020, as well as how COVID-19 has changed job conditions and amount of work. Those who experienced a reduction or loss of work were asked about the reasons for this change. The majority (75%) of respondents were employed full-time on March 2, 2020. However, only 40 percent of respondents continued to work at their usual place of work. After March 2nd, 33 percent were temporarily working from home and 21 percent were temporarily not working due to COVID-19.<sup>3</sup>

<sup>1</sup> "The Impact of COVID-19 on the Canadian Labour Market." *Statistics Canada*. Accessed June 2020. <https://www150.statcan.gc.ca/n1/pub/11-627-m/11-627-m2020028-eng.htm>

<sup>2</sup> "COVID-19 and the Labour Market in May 2020." *Statistics Canada*. Accessed June 2020. <https://www150.statcan.gc.ca/n1/pub/11-627-m/11-627-m2020038-eng.htm>

<sup>3</sup> <https://www.planningboard.ca/reports/covid-19-impact-reports-2020/>

Each county also introduced local business surveys to collect data around how COVID-19 impacted local businesses. Most surveyed businesses indicated that the impact of COVID-19 was significant when they filled the survey in March (Bruce County: 87%<sup>4</sup>, Grey County: 80%<sup>5</sup>, Huron County: 85%<sup>6</sup>, and Perth County: 74%<sup>7</sup>). Many businesses shut down operations, laid off staff, or reduced operating hours as a result of COVID-19. According to the local surveys, 56 percent of businesses had shut down operations and another 39 percent had laid off staff in Grey County, representing a total of 4,284 employees. Similarly, 180 out of 505 businesses surveyed (36%) in Bruce County closed temporarily as a direct impact of COVID-19, another 163 business postponed business investment and 127 reduced operating hours. In Huron County, 61 percent (141 respondents) stated that they would be shutting down operations during COVID-19, with a total loss of business income. Perth County had 44 percent surveyed businesses shut down operations, 35 percent laid off staff, and 36 percent reduced hours of operation due to COVID-19.

Between April 28 and May 11, Community Foundation Grey Bruce also conducted their Not-For-Profit survey on the impact of COVID-19. The result indicated that “87% [respondents] identified the cancellation of event and/or fundraising activities as a challenge being experienced.”<sup>8</sup> The current restrictions have caused “60% of local organizations closing until these restrictions can be lifted with many organizations concerned about how they will generate momentum for public gatherings.” From these local survey data, it is clear that the initial impact of COVID-19 was severe and unprecedented.

All businesses, regardless of size, faced serious challenges of declines in revenue, bankruptcies and job losses. Most of the survey respondents from above declared their need for financial support from the provincial and federal governments. Starting in April, the Canadian government introduced various kinds of support to both individuals and businesses including Canada Emergency Response Benefit (CERB), Canada Emergency Wage Subsidy (CEWS), Canada Recovery Caregiving Benefit (CRCB), Canada Emergency Business Account (CEBA) interest-free loans, etc.<sup>9</sup> Through these targeted financial programs, employees and businesses could get some of their financial stress alleviated. According to the Western Ontario Warden’s Caucus survey results, by mid-April, 57 percent of businesses had accessed government support (including Grey and Perth).<sup>10</sup> The survey also indicated that most of the COVID-19 impacts have been felt by smaller businesses with 5-19 employees. While the majority (98%) of all businesses is composed of small businesses, their performance is the key to the economic recovery.<sup>11</sup> However, small businesses often do not have the cash flow to offset significant revenue losses over a prolonged period or have the capacity to take on more debt. The Conference Board of Canada found that in April, “the index of business confidence dropped by

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4 “Economic Impact of COVID-19 in Bruce County.” Accessed April 2020. <https://pub-brucecounty.escribemeetings.com/filestream.ashx?DocumentId=9409>

5 “Business Impact Surveys.” Accessed May 2020. <https://www.grey.ca/covid-19-resources/surveys>

6 “Impacts of COVID-19 on Huron County Businesses- Survey Results.” April 2020.

7 “COVID-19 in Perth County Measuring the Impact on the Business Community.” Accessed May 2020. <https://www.perthcounty.ca/en/doing-business/resources/files/COVID-19-in-Perth-County---Measuring-the-Impact.pdf>

8 “Impact of the COVID-19 Survey Results.” *Community Foundation Grey Bruce*. Accessed August 2020. <https://communityfoundationgreybruce.com/post/?ID=218>

9 “Canada’s COVID-19 Economic Response Plan.” Accessed December 2020. <https://www.canada.ca/en/department-finance/economic-response-plan.html>

10 “Western Ontario Warden’s Caucus Impacts of COVID-19 Pandemic on Businesses in Western Ontario 2.0.” *Western Ontario Warden’s Caucus*. Accessed April 2020. <https://wowc.ca/wp-content/uploads/2020/06/WOWC-Impacts-of-COVID-19-Pandemic-on-Businesses-2.0-Report-FINAL.pdf>

11 Tam, Stephanie, Shivani Sood and Chris Johnston. “Impact of COVID-19 on Small Businesses in Canada, Third Quarter 2020.” *Statistics Canada*. Accessed November 17, 2020. <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2020001/article/00088-eng.htm>

half, its lowest level on record.”<sup>12</sup> Similarly, Ontario Chamber of Commerce (OCC) conducted a survey during the fall of 2020 and found “only 21 percent of survey respondents expressed confidence in Ontario’s economic outlook.”<sup>13</sup> Stratford-Bruce Peninsula ER specifically showed only 14 percent of business confidence. According to OCC’s 2021 Ontario Economic Report, top reasons for low business confidence for the Stratford-Bruce Peninsula ER were: low consumer confidence and high business tax rates. As a result, it is important to boost consumer confidence in order to raise business confidence and provide financial programs to help small businesses with their financial struggles caused by the COVID-19.

As the initial COVID-19 economic shutdown has changed to more limited and targeted public health measures, businesses started to reopen and rehire their employees. Since the end of May, many businesses have started to “adapt to the new reality by shifting to teleworking, reducing hours, laying off staff, applying for government funding or seeking rent relief.”<sup>14</sup> According to the Canadian Federation of Independent Business, “three quarters of small businesses have taken on debt as a result of COVID-19.”<sup>15</sup> Even with government funding being accessible due to debts, some businesses especially in the hardest hit sectors such as Accommodation and food services, had to shut down because of COVID-19. The permanent closures of local businesses are likely to disrupt the entire supply chain since “every business— from nail salon to e-commerce start-up— is a supplier to and/or customer of other firms.”<sup>16</sup> Therefore, it is essential to support local businesses to survive in this pandemic. Such support can be financial funding and marketing of buying local initiatives.

For the surviving businesses, they will continue need workers, supplies such as personal protect equipment, and financial support in order to survive in the second and future waves of COVID-19. It will take time and investment for them to expand their businesses and reposition themselves for a new economy that is more digital, virtual, and mobile than before.<sup>17</sup> New businesses may also emerge to adapt to the new economy and eventually restore much of the lost capacity due to permanent closures. Both surviving and new businesses are crucial to the recovery of the local economy.

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12 “COVID-19 Drops Business Confidence to Lowest Level Ever.” *Conference Board of Canada*. Accessed April 29, 2020. <https://www.conference-board.ca/insights/covid-19>

13 “2021 Ontario Economic Report.” *Ontario Chamber of Commerce*. Accessed February 18, 2021. <https://occ.ca/interactive-oer2021/>

14 Tam, Stephanie, Shivani Sood and Chris Johnston. “Impact of COVID-19 on Small Businesses in Canada, Third Quarter 2020.” *Statistics Canada*. Accessed November 17, 2020. <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2020001/article/00088-eng.htm>

15 “Small business debt load tops \$150,000: Recovery will be impeded if more financing is not made available.” *Canadian Federation of Independent Business*. Accessed April, 2020. <https://www.cfib-fcei.ca/en/media/news-releases/small-business-debt-load-tops-150000-recovery-will-be-impeded-if-more-financing>

16 “Small Business Big Pivot.” *RBC Thought Leadership*. Accessed November, 2020. <http://www.chatham-kentchamber.ca/pdfs/SmallBizBigPivotReport.PDF>

17 Ibid.

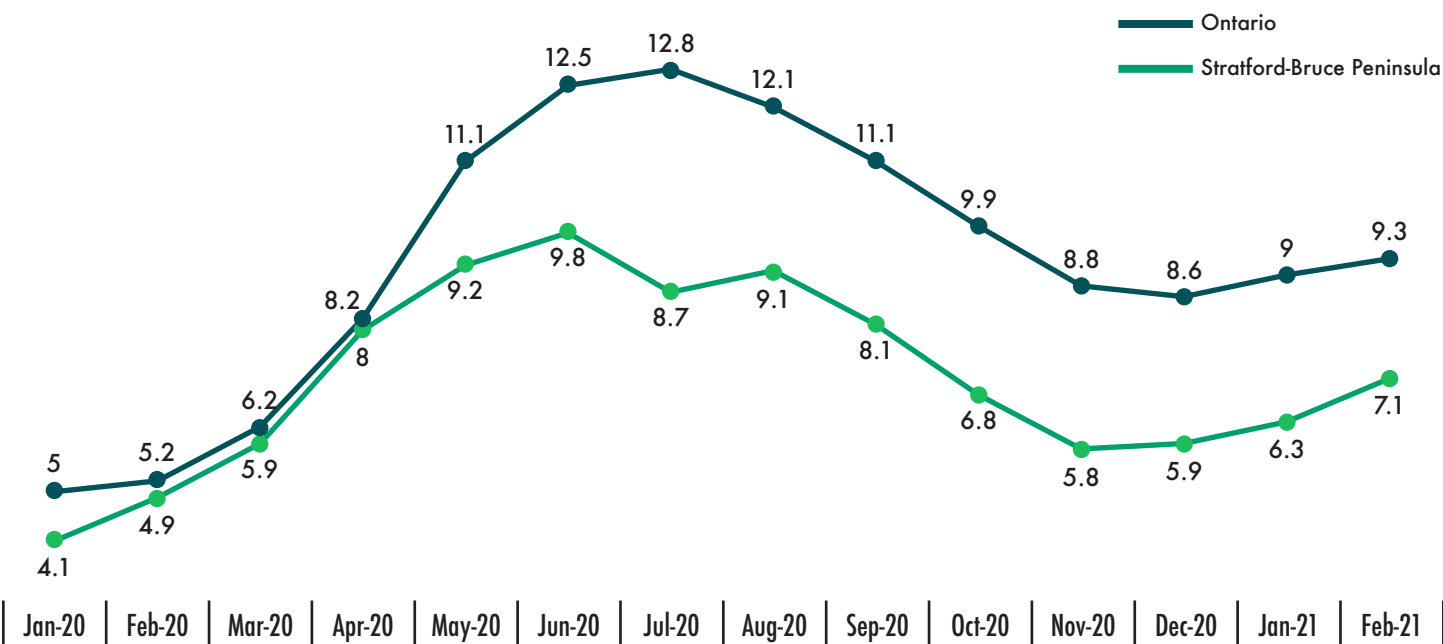
# THE PRESENT: Impacts and actions in the short-term

## IMPACTS FELT IN THE FOUR COUNTY AREA

Since March 1st, 2021, the Grey Bruce Health Unit was declared in Green Prevent the Level of the framework and Huron-Perth was declared in the Yellow Protect level of the framework. As of March 14th, 2021, the Grey Bruce Health Unit reported 727 cumulative cases of COVID-19 and the Huron Perth Public Health region reported 1,386 cumulative cases. Though the impact of COVID-19 on the four counties were not as severe as other regions in Ontario, the pandemic related impact on the labour market was evident and significant.

Between February 2020 and February 2021, the employment of Stratford-Bruce Peninsula ER decreased from 173,900 to 165,000, a loss of 12,000 workers. In 2020, the unemployment rate in the Stratford-Bruce Peninsula ER largely increased from 4.9 percent in February to the peak of 9.8 percent in June, which was twice of the February rate (see Chart 2). At the provincial level, the unemployment rate increased as well from 5.2 percent in February to the highest record level of 12.8 percent in July. Both showed the negative shock of COVID-19 on the Stratford-Bruce Peninsula ER and Ontario as a whole. Since the initial COVID-19 economic shutdown has changed to more limited and targeted public health measures in May, many businesses started to reopen and rehire their employees. The employment of the four county area began to recover. Between July and November, the unemployment rate has dropped significantly and reached 5.8 percent in November, only 0.9 percent point higher than the pre-COVID level in February. While this could show a positive sign of slow recovery of the local economy, things changed when the second lockdown was introduced on December 26th. The renewed restrictions resulted in temporary or even permanent business shutdowns and unemployment. Non-essential businesses were forced to be closed again or provide limited services. According to the latest LFS data, the unemployment rate for February 2021 was 7.1 percent, 2.2 percentage points higher than February, 2020.

CHART 2: UNEMPLOYMENT RATE, MONTHLY



Source: Statistics Canada. Table 14-10-0387-01 Labour force characteristics by economic region, three-month moving average, unadjusted for seasonality, last 5 months



As of August, all jobs that can be restored have been restored<sup>18</sup>. With the battle against COVID-19 ongoing, jobs that have not been restored may be harder to restore or may disappear altogether. Shockingly, the RBC report indicated that the long-term unemployment (27 consecutive weeks or more) in Canada “has surged by nearly 250% since the beginning of the pandemic”.<sup>19</sup> According to the LFS report in November, “A total of 443,000 Canadians, or one-quarter (25.6%) of all the unemployed, had been continuously out of work for 27 weeks or more”.<sup>20</sup> From previous findings, “workers who became unemployed as a result of previous economic downturns have experienced a range of long-term consequences, including long-term reduction in earnings”.<sup>21</sup> The RBC report also mentioned that “Long periods of joblessness can have multiple consequences, including eroding skills and increasing the likelihood that affected workers drop out of the labour force altogether.”<sup>22</sup> Therefore, workers who are experiencing a prolonged period of joblessness due to COVID-19 may face many short-term and long-term challenges. The local labour market recovery depends largely on how quickly the permanently laid-off workers and those who have been jobless for extended periods find new work.

Overall, part-time jobs have been steadily recovering in Canada at a faster speed than full-time positions. The Stratford-Bruce Peninsula ER also experienced a faster recovery of part-time jobs than full-time jobs. The total employment in the Stratford-Bruce Peninsula ER decreased from 165,300 in February to the lowest of 146,700 in August, a total decrease of 18,600. After August, employment has gradually increased, especially in the goods-producing sector. Compared to the services-producing sector, the goods-producing sector provides working conditions that limit the risk of exposure of the virus. As a result, the services-producing sector suffered a slower recovery and remained sensitive to changes associated with the pandemic. However, with the second lockdown being introduced in late December, the goods-producing sectors started to decrease while services-producing sector rose. This trend continued until the public health restrictions were eased in February. The current level of employment (February 2021) for the goods-producing sector was 55,600 and services-producing sector was 99,700, both were lower than the pre-COVID level (see Chart 3).

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18 Hagan, Shelly. “The Easy Part is Over for Canada’s Labour Market Recovery.” *Bloomberg*. Accessed September 3, 2020. <https://www.bloomberg.com/news/articles/2020-09-03/the-easy-part-is-over-for-canada-s-labor-market-recovery>

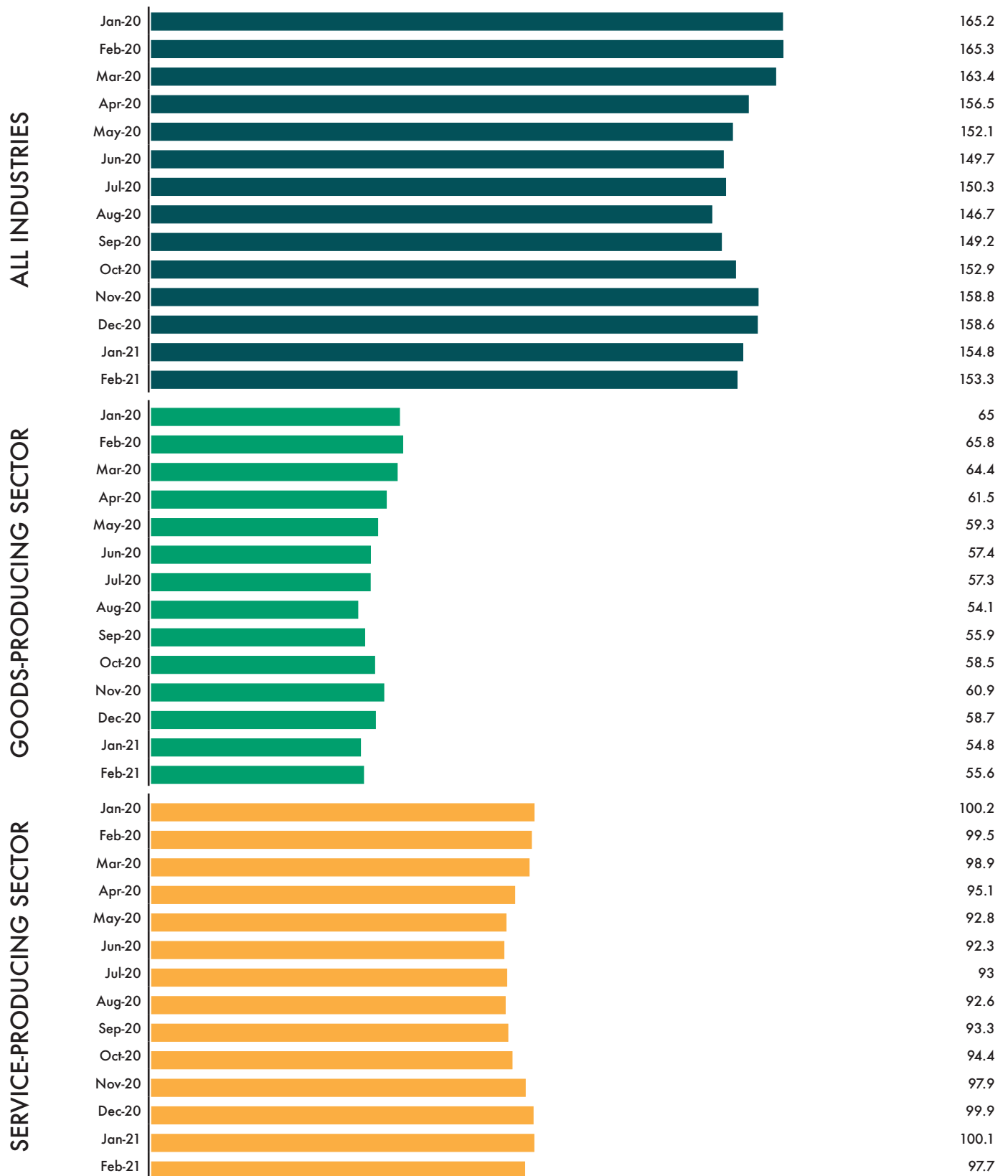
19 “Navigating 2020: 21 Charts for the Year Ahead.” *RBC*. Accessed December 8, 2020. <https://thoughtleadership.rbc.com/navigating-2021-21-charts-for-the-year-ahead/>

20 “Labour Force Survey, November 2020.” *The Daily*. Accessed December 4, 2020. <https://www150.statcan.gc.ca/n1/daily-quotidien/201204/dq201204a-eng.htm>

21 Ibid.

22 “Navigating 2020: 21 Charts for the Year Ahead.” Accessed December 8, 2020. <https://thoughtleadership.rbc.com/navigating-2021-21-charts-for-the-year-ahead/>

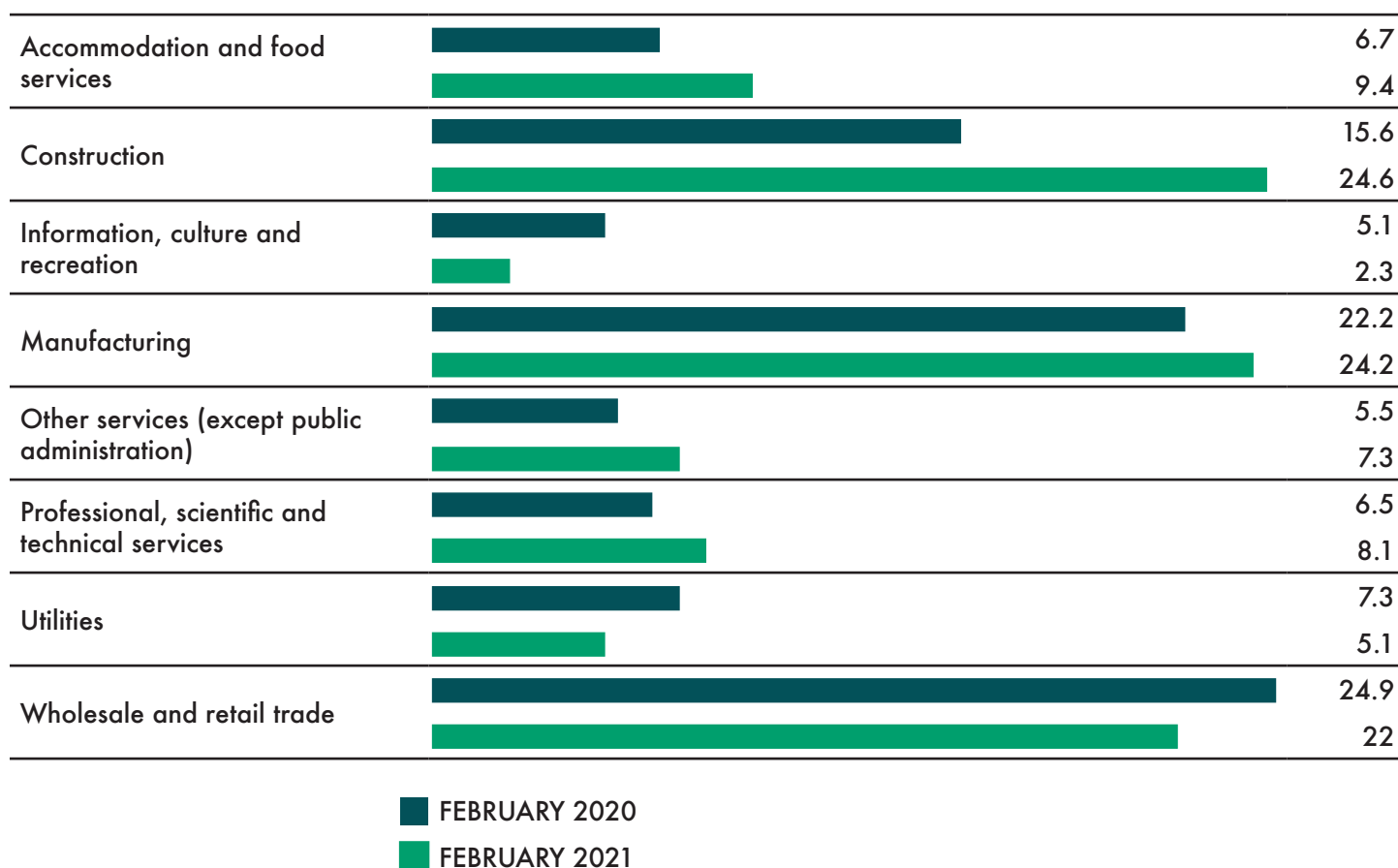
CHART 3: TOTAL EMPLOYED, ALL INDUSTRIES, Stratford-Bruce Peninsula (x 1,000)



Source: Statistics Canada. Table 14-10-0388-01 Employment by industry, three-month moving average, unadjusted for seasonality, provinces and economic regions (x 1,000)

The impact of COVID-19 on economic activity has been unprecedented and highly uneven across sectors. Obviously, the most affected sectors were tourism and travel, restaurants, education, arts, culture, recreation and sports, and various kinds of consumer goods. Accommodations and food services, construction, wholesale and retail trade have been the top contributors to lost employment in the four county area. Of the 15,600 jobs lost between February and June 2020, 12,400 were lost in these industries. On the other hand, demand for food products, catering services, and medical and paramedical products was booming. There was an increasing demand for Internet services, telecommunications and delivery as well. Compared to February (the pre-COVID level), several industries have rebounded fully in November while others still lagged behind. For instance, employment in Wholesale and retail trade exceeded the pre-COVID level as did the number of people working in Information, culture and recreation, 5,300 and 1,500 higher than February, respectively. Construction, however, still remained below its pre-COVID level (5,300 less than February), followed by Accommodation and food services and Education services. With the second lockdown being introduced in late December, some industries were hit again. In February 2021, the sectors with the largest percent employment gap compared to February 2020 were Construction (-37%), Accommodation and food services (-29%), Other services (-25%), and Professional, scientific and technical services (-20%) (see Chart 4). This shows that the regional labour market recovery strategies should focus first on these sectors which can bring larger contribution to the total employment in the region.

**CHART 4: INDUSTRIES WITH MOST EMPLOYMENT CHANGES (x 1,000)**



Source: Statistics Canada, Labour Force Survey

## IMPACTS WE CAN ANTICIPATE THROUGH THE RESTART PHASE

According to the McKinsey report, economic growth will resume once COVID-19 is under control while ending lockdown alone will not restore confidence and growth.<sup>23</sup> Charumilind et al. also indicated that “For every three months we delay in getting the virus under control, we push back the return of GDP to pre-crisis levels by about six months.”<sup>24</sup> Therefore, time is urgent and things will change until an effective treatment or vaccine is deployed to the general population.

There are a few impacts of COVID-19 we can anticipate in the following months:

- When the magnitude and duration of COVID-19 remains unclear, both consumer confidence and business confidence will remain low.
- The current containment measures such as social distancing and face covering will continue to be maintained or reinforced, which will further shape the new way of living and working.
- Any strong viral resurgence in the future will create higher unemployment and prolong weak investment. Many Canadian companies would expect the COVID-19 shock to last longer, especially for the hardest hit businesses such as retail, tourism, food services, entertainment, and other personal services.
- Working from home becomes more popular and demand for office decreases, which causes issues for commercial real estate industry.
- The demand for local internet connectivity and security services will increase.
- Healthcare, construction and manufacturing will continue facing workers shortages. Skilled trades will still be in demand.
- Frontline and essential workers will overwork and many of them will have decreasing mental health.
- Mental health issues are very likely to rise and many people, especially the older generation, will be struggling and feel lonely.
- Groups who were already disadvantaged or precariously employed in the workforce before COVID-19 will be left further behind, such as low-income earners, new immigrants, individuals with lower educational attainment, women and youth.
- From the positive side, E-commerce, teleworking and digital activities will continue to flourish, which may shift the local society into the digital age faster than expected. Meanwhile, this change may generate new local job opportunities.
- Local delivery services will create new job opportunities as well.

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<sup>23</sup> Charumilind, Sarun, Ezra Greenberg, Jessica Lamb, and Shubham Singhal. “COVID-19: Saving Thousands of Lives and Trillions in Livelihoods.” *McKinsey & Company*. Accessed August 17, 2020. <https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/covid-19-saving-thousands-of-lives-and-trillions-in-livelihoods>

<sup>24</sup> Ibid.

- Both fiscal and monetary supports are anticipated to continue in order to help individuals and businesses endure through this virus-control time.

## EXISTING, ONGOING, AND PLANNED REACT AND RESTART INITIATIVES

As mentioned before, the Canadian government has provided various kinds of financial support to both individuals and businesses such as CERB, CEWS, and CEBA interest-free loans. In the four county area, each county also introduced similar and/or other support to help the local workforce with the current crisis.

- The **Four County Labour Market Planning Board** launched its connect2JOBS website on June 18th, a job aggregator to help local job seekers with their job search.
- **Bruce County** formed its Economic Task Force, which is made up of economic development professionals, business owners, local stakeholders, and municipal staff, to support businesses and guide Bruce County to a thriving economy once again.<sup>25</sup> On their web page, Bruce County offers a variety of resources for businesses to re-open during the COVID-time, including but not limited to Open in Bruce Business Map, Partnership Programs to Support Businesses, and Financial Support.
- **Grey County** launched the COVID-19 Resources for Business page on grey.ca. They created a number of tools to support businesses and restart their local economy after the restrictions were lifted. For example, the Community and Business Resiliency Map, COVID-19 Business Reopening Guidebook, Workplace Safety Plan, and Business Support Line are all available to the local businesses.<sup>26</sup>
- **Huron County** created its County of Huron Recovery Team to provide support to the community by helping people get back to work in healthy and safe environments and encouraging citizens to make local purchases and support local business.<sup>27</sup> The team has also developed a series of initiatives including Government and Financial Support for Individuals and Businesses.
- **Perth County**, in collaboration with The City of Stratford and the Town of St. Marys, provided many programs and resources to support local businesses in making necessary physical and mental adaptations for the new normal. Two of them were Mental Wellness for Small Business Owners & Entrepreneurs and PPE Supplier Directory. In November, Perth County launched the new PC Connect, a community transit system that offers 5 routes throughout the County and surrounding areas, to improve local transportation.<sup>28</sup>
- Each county's staff and partners are developing targeted and strategic marketing plans to encourage travel to and spending within each county once it is safe to do so.

<sup>25</sup> Economic Take Force. Accessed December 2020. <https://brucecounty.on.ca/business/economic-task-force>

<sup>26</sup> COVID-19 Resources for Businesses. Accessed December 2020. <https://www.grey.ca/covid-19-resources>

<sup>27</sup> Huron County Recovery Team. Accessed December 2020. <https://www.huroncounty.ca/economic-development/our-services/huron-county-recovery-team/>

<sup>28</sup> PC Connect- Your Community Transit System. Accessed December 2020. <https://www.perthcounty.ca/en/living-here/community-transportation---perth-county-and-stratford.aspx>

- Bruce Power, in cooperation with Bruce, Grey, and Huron counties, created an initiative called Grey Bruce Huron Strong in order to keep people in these communities close and connected during this COVID-19 period.<sup>29</sup> It provides the most recent and trusted information for people and businesses in need and encourages people to support local businesses during the pandemic.
- Employment Ontario partners are offering skills development programmes to facilitate training and readjustment.

## IDEAS FOR ADDITIONAL REACT, RESTART, AND EARLY RECOVER INITIATIVES

- Small and medium sized businesses are disproportionately impacted. They are highly represented in the most impacted sectors. Employment and economic development organizations, municipal governments, and chambers of commerce can use their networks to identify opportunities for them.
- The provincial and federal government should provide clear and consistent communication and guidelines for business owners. This is essential for businesses that plan a safe re-opening and hiring staff.
- Matching the demand for and supply of the local workforce (with job postings) to address immediate hiring needs can highlight how many jobs were filled as a result of essential worker registry.<sup>30</sup>
- Develop workforce training programs to identify in-demand skills and re-skill the workforce as needed through the changing demand in the economy.
- Helping workers navigate national programs and directing them to mental health and childcare services.
- Additional support to organizations in the social economy who are dealing with the short and long term social impacts of the crisis. These are the organizations whose mission is to improve individual and community well-being, including preserving employment.
- Additional support for local and regional projects that focuses on entrepreneurship and small business.

<sup>29</sup> Grey Bruce Huron Strong. Accessed December 2020. <https://www.gbhstrong.com/>

<sup>30</sup> Ahrend, Rudiger and Karen Magire. "From Pandemic to Recovery: Local Employment and Economic Development." Accessed April 27, 2020. <http://www.oecd.org/coronavirus/policy-responses/from-pandemic-to-recovery-local-employment-and-economic-development-879d2913/>



## THE FUTURE: A RANGE OF REALITIES, IMPACTS, AND RESPONSES

The four county area has a high proportion of seniors, who are especially vulnerable to COVID-19. As a result, nursing homes and community facilities for elder care in the region face many challenges. Ever since the pandemic began, the demand for healthcare professionals, home support workers, and janitorial services has increased. As the social distancing rule was introduced in May, the demand for delivery also increased as people prefer contact-free shopping to avoid COVID-19.

According to the Four County Job Demand Report in February 2021, the top in-demand occupations were

- Home support workers, housekeepers and related occupations
- Retail salespersons
- Registered nurses and register psychiatric nurses
- Licensed practical nurses
- Delivery and courier service drivers<sup>31</sup>

The jobs that have been recruited by skill type were Sales and service occupations (26.4%), Trades, transport and equipment operators and related occupations (17%), and Health occupations (12.7%).<sup>32</sup> On the other hand, the job seekers were interested in Sales and services occupations (27.1%), Management (23.5%), and all skill types (15.4%).<sup>33</sup> Clearly, there is a mismatch between job supply and job demand in the local labour market. If the job seekers who are interested in all skill types of jobs can be matched to the high in-demand occupations, the vacancy rate may decrease. However, as long as COVID-19 is not under control with an effective and widely used vaccine, this gap may remain for the next 12-24 months.

In addition, COVID-19 has had various impacts on the local communities. Many people from cities chose to move to the four county area due to COVID-19 related health concerns. While this may increase the local demand of resources, one economic development officer also indicated that this situation may tighten the issue of the availability of housing in the local area. Similarly, the local tourist attractions such as beaches experienced an increase in visitors during summer time. This situation happened mainly due to the four counties' low population density and less risk in terms of COVID-19 transmissions. Moreover, many local residents also prefer locally grown products for safety concerns. The economic development officers of each county have been re-marketing local businesses. As a result, the demand for the local food supply chain increased during COVID-19, which can put extra pressure on local manufacturers.

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31 "Four County Job Demand Report- February 2021." Accessed March 5, 2021.

<https://www.connect2jobs.ca/wp-content/uploads/2021/03/21-02-C2J-Job-Demand-Report.pdf>

32 Ibid.

33 "Four County Job Search Report- February 2021." Accessed March 5, 2021. <https://www.connect2jobs.ca/wp-content/uploads/2021/03/21-02-C2J-Job-Search-Report.pdf>

Furthermore, many sectors such as employment services have benefited from teleworking as their employees do not have to travel far to meet their clients or vice versa. As the containment measures were lifted in summer time, some sectors chose the hybrid mode (in-person and online) to deliver their service, meeting the needs of various clients. However, stakeholders in this sector reported that people will need to be trained to use digital tools such as different video meeting tools. One superintendent also highlighted the staffing shortage in education as well as the issue of remote learning. Technical skills related to technology are in demand. More importantly, employers cannot take on co-op students with COVID-19. As a result, experiential learning is on hold. These students will lack on-hands experience and soft skills before they enter the labour market.

With these advantages and disadvantages of the impact of COVID-19 on the local communities and through research, we identified about forty key factors that would influence our labour market in the next 12-24 months. We used two surveys (one internal and another external) to narrow down these factors into two critical uncertainties. From stakeholders' point of view, the impact of the pandemic, specifically the implication of a vaccine, and the impact of remote working were the most influential but out of control factors to their sectors. With these two critical uncertainties, we built out four probable scenarios for the following report.

## CRITICAL UNCERTAINTIES

### CRITICAL UNCERTAINTY #1 THE IMPACT OF THE PANDEMIC (i.e. the implication of a vaccine)

Beyond the health impacts of COVID-19 on the quality of life, COVID-19 also created tremendous shocks on the economy as a whole. In particular, the pandemic has led to a severe increase in unemployment, a decrease in hours of work and labour force participation. The prolonged lengths of the pandemic and the social distancing measures have also affected consumer confidence by keeping consumers at home and discouraging their spending. Therefore, the path of the economy significantly depends on the course of the virus. The ongoing public health crisis will continue to dictate the economic activity, labor market performance such as employment, and inflation. Any strong virus resurgence can create higher unemployment and prolonged weak investment. The length and severity of the economic downturn will depend on several key factors such as consumer confidence to spend, business confidence to invest, the trajectory of COVID-19, the duration of job losses, and the scale of business closures in the four county area.

Challenges remain when the resurgence of COVID-19 infections is still uncertain and the seasonality of the virus is yet confirmed. The new variant of COVID-19 is more rapidly spread and easily transmitted, which raises many concerns. The length of social distancing and mask-wearing also remains unclear. However, one thing is clear: a more severe economic crisis will be exacerbated by a more severe public health crisis. Starting in November, every single metric is getting worse in Ontario— cases, hospitalizations, deaths, and positive rate. Huron Perth is experiencing multiple outbreaks in hospitals, long-term care home, and schools while Bruce Grey also experienced increasing cases of COVID-19. As containment measures were re-introduced and lockdowns were extended to the whole province at the end of December, the labour

market in the four county area were hit again and the unemployment rate rose to 6.3 percent in January 2021. Service-producing industries such as accommodation and food services still heavily impacted by containment measures as the second lockdown intensified. For example, Blue Mountains had to suspend all ski operations to comply with the shutdown orders during the ski season. Restaurants could only offer take-outs. These service-producing industries may not fully recover until an effective vaccine is widely available and administered. Besides retail and wholesale trades, many good-producing industries have not yet recovered to the pre-COVID level as well. Localized mobility is assumed to be continued along with strict requirements on personal protective equipment. Limits on personal interactions are assumed to persist, including physical social distancing requirements and restrictions on the size of gatherings. Local labour market will continue to be negatively affected by these restrictions. If there is a third, fourth or more waves of COVID-19, the business confidence will drop further and the local economic recovery will be longer than expected. For this reason, a strong economic recovery will happen once an efficient public health response is put into place with effective vaccines and/or viral treatment.

Recently, there has been good news stories about vaccines. The first shipment of Pfizer COVID-19 vaccine doses were expected to arrive in Canada in the middle of December.<sup>34</sup> The first COVID-19 vaccine shot was administered to some prioritized people on December 14th, 2020.<sup>35</sup> Vaccines started to be distributed to residents in long-term care homes of Huron Perth on Jan 15th, 2021.<sup>36</sup> As of March 12th, more than 2.1 million Canadians have received their first vaccine doses.<sup>37</sup> While these provide a glimpse of hope in fighting against the COVID-19 pandemic, many major questions regarding these COVID-19 vaccines are still unsolved. For example, Charumilind et al. indicated that “long-term safety [of the vaccines], timely and effective distribution, and vaccine acceptance by the population” is still unclear, not mentioning that the “lingering epidemiological questions such as the duration of immunity” remains unknown.<sup>38</sup> They estimated that it takes at least “three to eight months for manufacturing, distribution, and adoption of sufficient vaccine doses to achieve herd immunity”.<sup>39</sup> Much of this also depends on the efficacy of vaccines and public acceptance of vaccines among different segments of the population. As a result, there is still a lot of uncertainty regarding vaccines.

In order to monitor the uncertainty of the pandemic and its impact on the local labour market, we have chosen the following indicators:

- Trends in rates of infection, outbreaks, and deaths from COVID-19 (Grey Bruce and Huron Perth Health Units).
- Unemployment rate, full-time employment, part-time employment, employment by industry,

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34 Aiello, Rachel. “Canada to Get First Pfizer COVID-19 Vaccine Doses before End of December.” *CTV News*. Accessed December 7, 2020. <https://www.ctvnews.ca/health/coronavirus/canada-to-get-first-pfizer-covid-19-vaccine-doses-before-end-of-december-1.5220229>

35 Aiello, Rachel. “‘V-Day’: First COVID-19 vaccines administered in Canada.” *CTV News*. <https://www.ctvnews.ca/health/coronavirus/v-day-first-covid-19-vaccines-administered-in-canada-1.5230184>

36 Montanini, Chris. “As Ontario hunkers down, vaccines begin to arrive in Huron-Perth.” *Goderich Signal-Star*. <https://www.goderichsignalstar.com/news/as-ontario-hunkers-down-vaccines-begin-to-arrive-in-huron-perth-3>

37 “Coronavirus vaccine tracker: How many people in Canada have received shots?” *CTV News*. <https://www.ctvnews.ca/health/coronavirus/coronavirus-vaccine-tracker-how-many-people-in-canada-have-received-shots-1.5247509>

38 Charumilind, Sarun, Ezra Greenberg, Jessica Lamb, and Shubham Singhal. “When Will the COVID-19 Pandemic End?” *McKinsey & Company*. Accessed November 23, 2020. <https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/when-will-the-covid-19-pandemic-end>

39 Ibid.

labour force participation rate, etc., month-by-month (LFS, Statistics Canada).

- Re-occurrence of lockdowns in Ontario, Canada (Ontario Newsroom).

FCLMPB has been monitoring these indicators on Google dashboard, which can be found at <https://planningboard.ca/pcspi>.

## CRITICAL UNCERTAINTY #2 THE IMPACT OF TELEWORKING

COVID-19 has accelerated the speed of digitalization in how we work, live and shop. At the same time, it also broke the cultural and technological barriers that prevented remote work in the past. Ever since the March lockdown across Canada, people, except essential workers, were forced to work from home. Although many people returned to the workplace as economies reopened in May, some still chose remote work (use interchangeably with telework) as the enforcement of social distancing measures remained. Statistics Canada's March 2020 Perspectives Survey Series found that 39.1 percent of people were teleworking during the last week of March.<sup>40</sup> Gallacher and Hossain estimated that 41 percent of jobs in Canada can be performed remotely, implying workers have almost reached the maximum capacity of telework in March<sup>41</sup>. Every sector of the economy obviously has various telework capacity. Sectors that have the highest amount of work that can be performed from home are Finance and insurance, Educational services, and Professional, scientific and technical services with over 75 percent of telework capacity.<sup>42</sup> However, Agriculture, Accommodation and food services, Construction and Manufacturing have the least capacity of telework (between 4% and 20%). While these sectors represent four of the five top sectors in the four county area, their limited capacity of telework make them vulnerable during the pandemic. Other sectors such as Health care and social assistance and Public transportation have given limited choices to work remotely as well.

In order to adapt to this digital transformation, many business owners invested to improve their online capabilities and equip their workforces to use digital tools such as video meetings. Those who have better online capabilities reported fewer declines in sales.<sup>43</sup> With remote work, workers and firms are able to save commuting time and expenses. Though there is little evidence of the productivity gains or losses from switching to remote work arrangements, Verbanas-Rutgers found that "parents working from home were happier and more productive than those without kids."<sup>44</sup> This was mainly caused by an increasing amount of childcare and housework that men could share while working from home. Even with these positive sides, remote work can come at a cost. For example, it is hard to maintain social ties online. Employees may feel a lack of belonging and collaboration can be challenging as well. Employees' productivity can also be challenged due to mental health, digital fatigue, and a lack of work-life balance. As a result, the benefits and drawbacks of remote work remain unclear.

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40 "Canadian Perspectives Survey Series 1: COVID-19 and Working from Home, 2020." *The Daily*. Accessed April 17, 2020. <https://www150.statcan.gc.ca/n1/daily-quotidien/200417/dq200417a-eng.htm>

41 Gallacher, Guillermo, and Iqbal Hossain. "Remote Work and Employment Dynamics under COVID-19: Evidence from Canada." *Canadian Public Policy*. Accessed May 28, 2020. <https://doi.org/10.3138/cpp.2020-026>

42 Deng, Zechuan, René Morissette and Derek Messacar. "Running the Economy Remotely: Potential for Working from Home during and after COVID-19." *Statistics Canada*. Accessed May 28, 2020. <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2020001/article/00026-eng.htm>

43 "EDC COVID-19 Impact Survey Suggests the Worst Is Behind Us." *Export Development Canada*. Accessed July 14, 2020. <https://www.edc.ca/en/blog/covid-19-edc-summer-survey-findings.html>

44 Verbanas-Rutgers, Patti. "How Working from Home Made Parents Happier." *World Economic Forum*. Accessed October 8, 2020. <https://www.weforum.org/agenda/2020/10/covid19-female-employment-working-parents/>

Besides telework, telehealth, distance learning and online shopping have all surged due to COVID-19. Unsurprisingly, the pandemic has increased the demand for network resources in rural areas. However, most places, businesses and households in the four county area still face poor bandwidth for connectivity. Many local providers still rely on older and slower technologies and they “have limited incentives to increase effective network capacity as consumer demand for network resources grows over time.”<sup>45</sup> Rajabiun et al has also raised the concern around “growing rural-urban digital divide in broadband service quality and affordability, and potential widening of intra-rural and intra-urban service gaps.”<sup>46</sup> With low levels of digitalization and difficulties in accessing networks, the economic recovery of rural communities during and after COVID-19 may be hindered.

In early June, the Ontario government invested \$150 million in reliable broadband and cellular service.<sup>47</sup> In early November, the provincial government decided to invest another \$680 million into this initiative called “Up to Speed: Ontario’s Broadband and Cellular Action Plan”.<sup>48</sup> While this funding aimed to improve local communities’ internet connectivity, the Southwestern Integrated Fibre Technology (SWIFT)’s service map shows that many areas in our region are not eligible for such funding.<sup>49</sup> Therefore, the unserved and underserved communities in the four county area still needs government intervention to improve local digital infrastructure. With this connectivity issue unsolved, local residents’ access to essential services such as healthcare, education, and jobs will be affected.

According to the LFS result, 4.6 million people still worked from home in November among those who worked at least half of their usual hours<sup>50</sup>. Statistics Canada shows that “Over 1/5th of businesses expect at least 10% of their workforce to continue tele-working after the pandemic.”<sup>51</sup> From February to May 2020, this share has increased to 32.6 percent.<sup>52</sup> Therefore, some forms of remote work are likely to persist even after the pandemic ends and we can assume this will apply to our region as well. However, the degree of such impact is unclear. While jobs require “cognitive thinking and problem solving, managing and developing people, and data processing have the greatest potential to work from home”, many physical and manual activities cannot be done remotely.<sup>53</sup> It is also uncertain how many jobs will be shifted to remote work after COVID-19.

The way we work, shop, travel will never be the same, more or less being influenced and transformed by COVID-19. But not every business or organization is prepared for such technological changes. Stackhouse indicated that “Some 48% of Canadian businesses feel they are unprepared for the technological changes

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45 Rajabiun, Reza, Helen Hambly, and David Worden. “Broadband Infrastructure Quality Gaps in Ontario.” Accessed December, 2020. <http://www.r2b2project.ca/wp-content/uploads/2020/11/Policy-Brief-03-Nov-2020-1.pdf>

46 Ibid.

47 “Ontario Improving Broadband and Cell Services for Rural Communities.” Accessed December, 2020. <https://news.ontario.ca/en/release/57104/ontario-improving-broadband-and-cell-service-for-rural-communities>

48 Davis, Greg. “Ontario investing \$1B over 6 years to improve internet, cellphone service.” Accessed November 4, 2020. <https://news.ontario.ca/en/release/57104/ontario-improving-broadband-and-cell-service-for-rural-communities>

49 “Our Service Map.” Accessed November, 2020. <https://swiftruralbroadband.ca/resources/our-service-map/>

50 “Labour Force Survey, November 2020.” *The Daily*. Accessed December 4, 2020. <https://www150.statcan.gc.ca/n1/daily-quotidien/201204/dq201204a-eng.htm>

51 “The Social and Economic Impacts of COVID-19: A Six-month Update.” Accessed October 20, 2020. <https://www150.statcan.gc.ca/n1/pub/11-631-x/11-631-x2020004-eng.htm>

52 Ibid.

53 Lund, Susan, Anu Madgavkar, James Manyika, and Sven Smit. “What’s Next for Remote Work: An Analysis of 2000 Tasks, 800 Jobs, and Nine Countries.” <https://www.mckinsey.com/featured-insights/future-of-work/whats-next-for-remote-work-an-analysis-of-2000-tasks-800-jobs-and-nine-countries>

forced by COVID, including their ability to support remote work over the long-term.”<sup>54</sup> For these reasons, the impact of remote work on the four county area remains one of the biggest uncertainties.

In order to monitor the uncertainty of remote work and its impact on the local labour market, we have chosen the following indicators:

- Worker Impact Survey: percentage of respondents with remote work.
- Statistics Canada surveys on teleworking capacity

FCLMPB has been monitoring these indicators on Google dashboard, which can be found at <https://planningboard.ca/pcspi>.

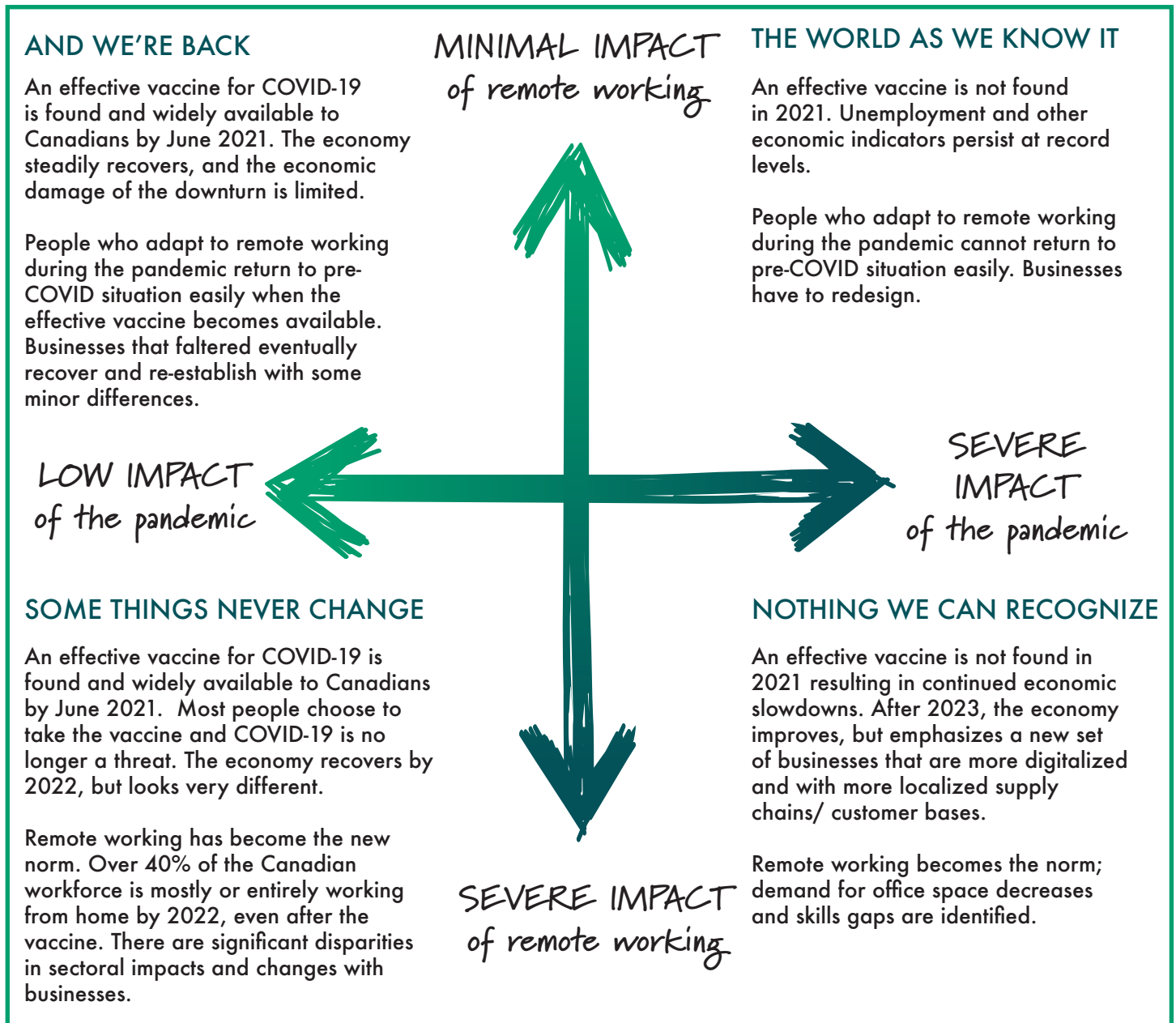
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<sup>54</sup> Stackhouse, John. “8 Ways COVID Will Transform the Economy and Disrupt Every Business.” Accessed September 24, 2020. <https://thought-leadership.rbc.com/8-ways-covid-will-transform-the-economy-and-disrupt-every-business/>



## SCENARIO MATRIX

Based on the possible interactions between the two identified critical uncertainties, the **Four County Labour Market Planning Board** has drafted the following scenarios:



## FOUR SCENARIOS: IN DETAIL

### PLEASE NOTE THE FOLLOWING:

#### These scenarios **ARE:**

- Hypothetical narratives that represent probable realities.
- Descriptive of the entire economy, not just a specific sector. Within each of these scenarios, each sector will experience varying levels and types of impacts, contingent on the global evolution of the COVID-19 crisis, and also contingent on the impacts of other local sectors.
- The outcome of global and national trends that are beyond our control. What would be within our control is how we, as a community, react to the challenges and opportunities that emerge in each scenario.
- A first version of scenarios. They are meant to start a conversation about how the four county area could overcome challenges and seize opportunities in each of these potential futures.

#### These scenarios **ARE NOT:**

- Predictions about the future. For now, we are not suggesting which of these scenarios is more likely.
- Complete. We rely on community and industry partners to complete the image of what these possible scenarios might look like.
- Final. We will adapt these as the situation evolves. Specific scenarios may be reformulated, ruled out, or added in the future.
- Attributions of value or likelihood. We are also not suggesting which scenario is better than the other.

**All scenarios present opportunities for growth.** Depending on the scenario, economic growth for the region is simply a matter of how, when, and in what activities.

Since a vaccine for the COVID-19 virus is found and widely available to Canadians by June 2021, many resources of healthcare will be shifted to prepare for vaccines. There is a need for enhanced workforce and enhanced use of resources. For example, one healthcare professional suggested that “pharmacists and doctors can also be included to provide vaccination, vaccine delivery and administration. Schools and daycares may have some potential to administer the vaccine and administration as well.” Since remote work is limited in healthcare, the need for registered nurses (RNs), registered psychiatric nurses, licensed practical nurses, and personal support workers (PSWs) will increase dramatically. Currently, there is a severe healthcare staff shortage in the four county area due to a higher demand of RNs and PSWs from long-term care homes. Also, COVID-19 has put additional pressure on some recruitment and hiring plans due to delays in clinical placements and qualify exams.

Manufacturing not only face supply chain difficulties, but also staff shortages. One stakeholder commented that the government has heightened health and food safety requirements due to COVID-19. Many businesses have to do things differently to adhere to new safety requirements. The declining participation rates of women and the lack of immigrants will affect the availability of labour for the manufacturing industry. Some local manufacturers have changed their shift times in order to match school time for parents picking up their children, such as 9 am- 4pm shift. The foreign workers that are normally hired for processing plants need to be quarantined for 14 days, which evidently increases the cost to the businesses. The shortage of tradespeople are also a concern. Businesses are still challenged to find talent with the skills they need, from digital skills to productivity-based management skills.

In terms of construction, we have reached out to home builder associations but unfortunately they haven't responded in the time of publishing this report. From local residents' feedback, the demand for construction has increased due to lower COVID-19 cases in the region (safer than cities) and residential development has been ongoing (especially with urban-rural moving). Also, consumer demand for home renovations has increased due to savings from vacation and travelling. This has created higher demand for carpenters, construction trades labourers, and AZ drivers. With the existing shortage in these tradespeople, the hard-to-fill positions may persist. According to the 2021 Contractor Survey, “More than half (56%) of contractors anticipate greater difficulty in accessing skilled labour this year compared to 2020.”<sup>55</sup> As a result, COVID-19 makes it more challenging for construction employers to find skilled labour. On the other hand, construction employers will continue facing supply chain shortage and disruptions attributable to COVID-19.

## RECOVER STAGE (JANUARY 2021 – JUNE 2021)

The virus is brought under control by the development of vaccines and the majority of population has taken the vaccine. The economy steadily recovers, and the economic damage of the downturn is more limited. The immediate impact of the vaccine is seen shortly in certain consumer-facing services sectors like restaurants, malls and travel. People who receive vaccinations are more confident with shopping, eating and working in office. Consumer confidence gradually rebound to the pre-COVID level and demand returns. Under this

<sup>55</sup> “2021 Contractor survey.” Ontario Construction Secretariat. Accessed March 11, 2021. <https://iciconstruction.com/wp-content/uploads/2021/03/2021-Contractor-Survey.pdf>

optimistic and favourable scenario, all the regional economic sectors will create opportunities for work. Restaurants and food services may need to promote their products to consumers to reach pre-COVID levels. The demand for related occupations such as cooks, servers, and food counter attendants increases to normal. Arts, culture and recreation will face pent-up demand as well. Travel agents, receptionists, hotel managers, cleaners, etc. will be again in demand. Domestic travel will surge while international travel will still lag behind. People will desire to travel and maintain relationships. As a result, road trips increases and there is more demand for localized adventures, which benefits to the four county area. Attendants in amusement, event planners, program operators and other related occupations will be in need. Manufacturing will hire more labourers and assemblers as the social distancing rule will be lifted. Over time, accommodation/food services, manufacturing, arts, culture and recreation industries will gradually return to the pre-COVID level of performance.

The vaccine also strengthens business investment as companies restart investing in the future and allow policymakers to relax restrictions. Non-essential businesses are open, but still with some physical distancing and capacity restrictions. Businesses who were able to survive during the COVID-19 through e-commerce and virtual practices are returning to their normal operations with face-to-face meetings, conferences, and business interactions. Digital delivery of services and goods remain for a minor number of businesses and organizations.

Some organizations learned new ways of providing services based on consumer preferences such as employment services and education. According to one stakeholder, "Vulnerable clients need a blended service model. Not everyone will do everything online. Some clients will need one on one services." As a result, they have learned to accommodate clients with all kinds of employment backgrounds and offer different training methods to meet various needs. With remote work, some firms and organizations are able to save commuting time and expenses. They now have alternative choices of holding virtual training, events and conferences online when weather is bad. This increases flexibility for both employers and employees.

## EARLY RESILIENCE STAGE (JULY 2021)

Consumer confidence is restored to the pre-COVID level as the virus is addressed by effective vaccines. There will be more "Buy Local" initiatives as governments have launched different campaigns in Ontario.<sup>56</sup> Most Canadians (80%) are more likely to choose local brands/ products, which will help local businesses to thrive.<sup>57</sup>

People who adapt to remote working during the pandemic returns to pre-COVID situation easily when the effective vaccine takes place. Trends such as automation, the digital marketplace, and future of work are accelerated to a limited extent. Businesses that faltered eventually recover and re-establish with some minor differences. Business confidence is restored and companies restart investing again. Companies that borrowed during the pandemic are able to pay back their debts. Industries such as construction that have responded to the COVID-19 pandemic by improving sanitation may continue these practices permanently.

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<sup>56</sup> Stackhouse, John. "8 Ways COVID Will Transform the Economy and Disrupt Every Business." Accessed September 24, 2020. <https://thought-leadership.rbc.com/8-ways-covid-will-transform-the-economy-and-disrupt-every-business/>

<sup>57</sup> Ibid.

Health and safety measures applied to sectors such as manufacturing, food services, and healthcare will remain to avoid another similar health threat. There will be more limited “increases in telehealth, e-prescription, at-home solutions, and other alternative delivery methods of healthcare.”<sup>58</sup>

With sixteen months of battle with COVID-19, people more or less experience an increase in anxiety, fear, and other mental health struggles. This could have major impact on the productivity levels of many Canadians. The increased demand for mental health services could translate into new job opportunities.

## RECOMMENDATIONS FOR BUSINESSES IN THIS SCENARIO

- Blended models of remote work and on-site work, requiring employers to invest in distributed tools and technologies to retain talent and enhance productivity.<sup>59</sup>
- More workplace personal protective equipment and office reconfigurations to accommodate more flexible work arrangements.<sup>60</sup>
- Improvement in supply-chain risk management, especially lower-tier suppliers. Any disruptions to them can cause disturbances throughout the whole chain.<sup>61</sup>
- Collaboration with local organizations that offer skill development and second career training to retain current employees and promote career growth.
- Review your own talent acquisition and retention strategies. Effective retention strategies can refer FCLMPB Retention Report.<sup>62</sup>
- Promote apprenticeship programs as a career option to youth and their parents.

## RECOMMENDATIONS FOR NEW POLICIES, INVESTMENTS, PROGRAMS AND SUPPORTS

- Readjust funding to healthcare to prioritize vaccination and improve salaries of PSWs and RNs.
- Focus on hardest hit sectors such as accommodation and food services and tourism. Promote local businesses.
- Develop a workforce strategy that helps permanent laid-off and long-term jobless workers transition to more sustainable, higher-quality jobs. There is also a need to recruit new workers to back-fill lower skilled entry-level positions such as service and manufacturing. Upskilling and re-skilling workers is essential, as is the need to recruit for entry-level positions in all industries.
- Promote apprenticeship programs as a career option to youth and their parents. The process of

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58 Stackhouse, John. “8 Ways COVID Will Transform the Economy and Disrupt Every Business.” Accessed September 24, 2020. <https://thought-leadership.rbc.com/8-ways-covid-will-transform-the-economy-and-disrupt-every-business/>

59 Ibid.

60 Ibid.

61 “Beyond COVID-19: Supply Chain Resilience Holds Key to Recovery.” Accessed April 9, 2020. <https://www.bakermckenzie.com/-/media/files/insight/publications/2020/04/covid19-global-economy.pdf>

62 “Employer Toolkit Retention Strategies.” FCLMPB. Accessed February 24, 2021. <https://www.planningboard.ca/2020-vision/employer-tool-kit-retention-strategies/>

becoming an apprentice needs to be streamlined and made less complicated and cumbersome for people and organizations to understand.

- Expand employment and training support to help employment service providers “evaluate existing skills and how they can be applied, as well as what new skills training might be needed.”<sup>63</sup> It is essential to match workers’ existing skills with new occupations.
- Strategic stimulus. As governments look to re-engineer supply chains and support national production, they may use new policies, including border carbon taxes, to limit purchases from foreign suppliers.<sup>64</sup>
- Upgrade rural internet/ broadband service in order to support online services.
- Provide more resources and assistance for families who are left behind. Provide programs to support women who are impacted by the pandemic.
- Timely and consistent information regarding the pandemic, financial programs and reopening regulations.
- Preparation for future pandemics.
- Reduce unnecessary government spending/debt level.

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63 Tobin, Steve. “Coping with the COVID-19 Labor Market Crisis: Views from Canada.” Accessed October 13, 2020. <https://newsroom.iza.org/en/archive/opinion/coping-with-the-covid-19-labor-market-crisis-views-from-canada/>

64 Stackhouse, John. “8 Ways COVID Will Transform the Economy and Disrupt Every Business.” Accessed September 24, 2020. <https://thought-leadership.rbc.com/8-ways-covid-will-transform-the-economy-and-disrupt-every-business/>



Healthcare will always be the frontier to the pandemic, especially before effective vaccines become available. Re-distribution of services and resources will happen to meet priorities. The number of infected cases needs to be managed. One healthcare professional indicated that since people are accessing health information more than ever, they are “aware now of the shortage of staff and the need for more health inspections.” Healthcare services will continue experiencing overworked employees. Another long-term care expert added, “Training opportunities and diversification in training are now front and centre. There can now be a role for PSW assistants.” Clearly, the demand for RNs, PSWs, and other healthcare specialists is increasing. The healthcare professional also mentioned that more vulnerable groups will be severely impacted by “closing shelters, people not donating clothes, lack of affordable housing and some food banks not being able to stay open.” Mental health issues will rise due to isolation and social distancing measures. There will be an increasing demand for life enrichment aide in long-term care facilities, social workers and mental wellness counsellors.

In terms of manufacturing, some work is hands-on which cannot be done from home. Even though front office and sales staff can choose to work from home, there is poor internet service in some communities. Those who would like to work from home will not be able to do so due to poor services. There is also a difficulty in keeping staff since many workers must stay home to care for their children and changes of school requirements are frequent. Some manufacturers have introduced flexible hours and shifts in order to minimize workers’ physical interaction. They have also hired women for a half shift to match school time. Therefore, these women could fulfill household duties and work at the same time. Even so, there is still a shortage of labour in manufacturing, especially skilled tradespeople. One manufacturing representative said that “Some companies may choose to go the automated way, which could result in loss of jobs.” However, automation could be very expensive and “small companies of less than 25 employees may shut their doors.” Also, automation will cause a shift of in-demand skills and occupations. Businesses will need to invest in re-training or reskilling much of their existing workforces for the future. On the other hand, some new manufacturers from other places may choose to invest in the four county area and hire local employees due to COVID-19. This may create job opportunities for the local area.

We have reached out to home builder associations but, unfortunately they haven’t responded in the time of publishing this report. Under the current scenario, we assume that some construction projects will be on hold due to the severe impact of COVID-19 in the local area. However, some home renovations may continue. Overall employment for this industry will decrease. In order to continue working, employers need to ensure the health and safety of workers and staff. There will be a high demand for N95 masks. The supply chain disruptions attributable to COVID-19 will still be a concern.

For Public Administration, it is hard for staff to plan programs and delivery services with uncertainties. They are trying to reinvent new forums. One positive change from COVID-19 for employment services is that they “no longer have to pay for transportation for [their] clients to attend training sessions. [They] will have virtual workshops.” However, computers are not accessible to everyone. Many people go to museums and libraries for computers. If these facilities close due to COVID-19 restrictions, many people will lose such access. On the other hand, it is difficult for low-skilled adults who lack digital skills to be re-skilled to adapt

this digital era. Stress levels will elevate for families and communities.

Under this scenario, the health regulations of the Education sector change frequently to meet the worsening COVID-19 situations. Both students and teachers need to adapt to the changing environment. Connectivity will become one of the main issues. One superintendent mentioned that the internet may not be sufficient to enable reliable access with multiple devices if more than one person needs to use the internet in the household. Also, the superintendent indicated that “Not all parents can work from home. Homes with more than one child, may not have computers for every child.” Therefore, it is a challenge for students to learn online, especially maintaining work and education at the same time. While the youth has been kept in the area which can fill up the labour shortage, their mental health is at stake. The need for mental wellness counselors in education will increase. With some of the learning being moved online, demand for teachers and support staff to get trained in digital technologies also increases. Another challenge for secondary schools is experiential learning. Many employers cannot take on students due to COVID-19 and its restrictions. Co-operative teachers have been struggling to get employers to take students. Students will miss out on exploring possible job opportunities first-hand. Many students will lack digital skills and other soft skills that cannot be accessed from online.

## RECOVER STAGE (JANUARY 2022 – JUNE 2022)

An effective vaccine is not found and widely administered to the Canadian population in 2021. The virus is harder to control and the number of infections and deaths rises to unprecedented levels in Ontario, prompting re-introduction of some containment measures. The economy is devastated as cities are forced to repeatedly shut down and shelter in place following second and third waves. Local economic activity plummets, generating mass business closures and unemployment. The economic damage of the virus goes beyond temporary decreases in spending and job losses. Unemployment and other economic indicators persist at record levels.

Social distancing measures are still in place with ongoing anxiety about the virus. Farmers, for example, are feeling lonely as they cannot meet with other farmers to discuss issues. Virtual events are difficult for farmers. One agriculture representative said, “Farmers Week is a huge event in the four counties. This will have to be done virtually and not all farmers are tech savvy. This event also draws lots of sponsorship from companies and if people cannot attend, these sponsorships will come to an end.” She added, “Farmers who are selling products on their farms are now dealing with the general public who are also stressed and not very patient and can be very rude and mean.” As a result, farmers are struggling with many things and their mental health are negatively impacted. Staffing in processing plants and farms will be another challenge to farmers. Employers who rely on temporary foreign workers or migrant workers for harvest may face shortage of labour due to international travel restrictions. This adds extra pressure on farming employers and the demand for farm workers rises. According to past EmployerOne surveys, agricultural businesses owners always indicated “not enough applicants” as the top reason for hard-to-fill positions. Such situation may persist or even worsen under this scenario. Moreover, farmers have to wait long periods to obtain equipment parts or have their equipment repaired. As a result, farmers may hire more locally or make dramatic changes to maintain their supply chain. Cost of parts and labour have increased significantly. The

positive side, however, would be that “Going online allows for greater audiences and different speakers. People from all over Canada can participate and see the great communities... Speakers from all over the world can now participate.”

Fast food chains will survive while independent restaurants will be in trouble. Many businesses are struggling financially and some are even struggling to stay open. More strict health and safety regulations attributable to COVID-19 will have negative impacts on service sectors and restaurants. Unemployment rates will increase as more restaurants shut down their businesses. Local restaurants need the general public to support them by ordering take-out. The demand for personal chefs increases as they can get into home for meal replacements.

Under this scenario, consumers are reluctant to travel, go to large events and retail spaces. E-commerce will become the mainstream for sales. There will be more demand for customer sales representative, online support technicians, delivery drivers, etc. The demand for personal protective equipment (PPE) also increases. Manufacturing will face shortage of labourers and assemblers to produce PPE. The demand for light duty cleaners also increases to endure compliance to safety protocols. The impact of COVID-19 on arts, culture, and recreation will continue to be profound. Employment will continue to be at lower levels compared to pre-COVID. Many businesses in this industry will be struggling to be open.

## EARLY RESILIENCE STAGE (JULY 2022)

After 2022, the economy improves slowly, eventually re-establishing most of the businesses and jobs that existed prior to the pandemic, with minor changes. Industries such as construction that have responded to COVID-19 by improving sanitation may continue these practices permanently. Health and safety measures applied to sectors such as manufacturing, food services, and healthcare will remain to avoid another similar health threat. For the hardest-hit sectors such as accommodation, major progress will happen only when the effective vaccine becomes available and widely accepted by the general public. People who adapt to remote working during the pandemic cannot return to the pre-COVID situation easily due to the length of the crisis.

With over two years of battle with COVID-19, most Canadian experience an increasing level of anxiety, fear, and other mental health struggles. This could have major impact on the productivity levels of many Canadians. With increased demand for mental health services, the demand for related occupations will increase resulting new job opportunities.

## RECOMMENDATIONS FOR BUSINESSES IN THIS SCENARIO

- More education and marketing about the food industry and local markets.
- More workplace personal protective equipment and office reconfigurations to accommodate more flexible work arrangements.<sup>65</sup>
- Provide higher wages for workers in the service sector.

<sup>65</sup> Stackhouse, John. “8 Ways COVID Will Transform the Economy and Disrupt Every Business.” Accessed September 24, 2020. <https://thought-leadership.rbc.com/8-ways-covid-will-transform-the-economy-and-disrupt-every-business/>

- Improvement in supply-chain risk management, especially lower-tier suppliers. Any disruptions to them can cause disturbances throughout the whole chain.<sup>66</sup>

## RECOMMENDATIONS FOR NEW POLICIES, INVESTMENTS, PROGRAMS AND SUPPORTS

- Readjust funding to healthcare and increase staffing levels of healthcare.
- Increase support and initiatives for mental health.
- Increase marketing on buying local.
- Develop a workforce strategy that helps permanent laid-off and long-term jobless workers transition to more sustainable, higher-quality jobs. There is also a need to recruit new workers to back-fill lower skilled entry-level positions such as service and manufacturing. Upskilling and re-skilling workers is essential, as is the need to recruit for entry-level positions in all industries.
- Financial assistance for the cost of automation and robotics.
- Increase funding for new technology and equipment for students.
- Develop strong partnerships at the municipal level.
- Strategic planning of giving out funding: balance of work incentives and unconditional cash transfers.
- Ensure the boarder to be open for food exports.

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<sup>66</sup> "Beyond COVID-19: Supply Chain Resilience Holds Key to Recovery." Accessed April 9, 2020. <https://www.bakermckenzie.com/-/media/files/insight/publications/2020/04/covid19-global-economy.pdf>

An effective vaccine is available and accessible to Canadians in 2021. Most people choose to take the vaccine and COVID-19 is no longer a threat to healthcare and the economy. Pressure of COVID-19 cases on healthcare alleviates and remote work is normalized in this scenario. However, there is limited remote working in the healthcare field. With a large-scale switch to teleworking, some forms of telehealth, e-prescription, at-home solutions, and other alternative delivery methods of healthcare will continue to be developed and the demand for related skills will rise. According to one healthcare professional, some office staff and inspectors may do some work from home but it will be challenging for them to get back to the workplace. They will take some time to adapt to the new normal. The healthcare professional also added, "Students who are studying in the healthcare field will have to do more online learning (which is not great to everyone). Their field placements are also being restricted somewhat." As a result, healthcare sector will face many difficulties to adapt remote working.

Due to a more modern, digital, and post-industrial economy, businesses in manufacturing will innovate and use automation in order to adapt the changes. One Manufacturing expert indicated that "Employers need the finances and ability to switch manufacturing to meet global demand that could change at any time... Small employers who are not able to automate due to costs will shut down." On the other hand, the local workforce will not be adequately prepared for the new tools and in-demand tech skills under this scenario. As a result, there will be a shortage of workers who are proficient with digital skills. According to Andrew Bieler, a Senior Research Associate at the Conference Board of Canada, such digital skills include "technical, information management, digital communication, virtual collaboration, creativity, critical thinking, and problem solving in digital environments."<sup>67</sup> The shortage of soft skills that was identified before COVID will continue to be in high demand during and after COVID: good work ethic, dependability, teamwork, and self-motivation. There will also be a demand for competent and innovative leadership. Manufacturers may need to reskill or upskill their existing workers including mid-career workers in the skilled trades. In the end, local manufacturers will learn from the supply chain issues faced during the pandemic to avoid future disruptions.

We have reached out to home builder associations but, unfortunately they haven't responded in the time of publishing this report. We assume that the rise of teleworking will continue to motivate people moving away from major metropolitan areas to places that are safer with higher quality of life. Since March, 2020, city dwellers have moved out of the cities to rural communities in the four county areas. This urban to rural moving has increased the demand for affordable housing and driven up the housing prices in some smaller communities. As the demand for houses increases, there will be a higher demand for carpenters and other construction trades labourers as well. However, the shortage of skilled tradespeople has always been a concern in the region. In both the 2020 and 2019 Contractor Surveys, "69% of contractors anticipated greater difficulty in getting skilled labour compared to the previous year."<sup>68</sup> This difficulty may remain and employers may continue facing challenges in hiring skilled labour in the four county area. On the other hand, construction employers will continue facing supply chain shortage and disruptions attributable to COVID-19. According to the 2021 Contractor Survey, "Nearly three-quarters (73%) of contractors indicated

<sup>67</sup> "Digital Skills Are Critically Important To The Future Success Of Tradespeople." *Conference Board of Canada*. Accessed February, 2021. <https://www.conferenceboard.ca/press/newsrelease/2020/09/15/digital-skills-are-critically-important-to-the-future-success-of-tradespeople>

<sup>68</sup> "2021 Contractor survey." *Ontario Construction Secretariat*. Accessed March 11, 2021. <https://iciconstruction.com/wp-content/uploads/2021/03/2021-Contractor-Survey.pdf>

at the beginning of 2021 that the coronavirus was having a medium or high impact on their supply chains, more than any of the four Coronavirus Contractor Surveys conducted in 2020.”<sup>69</sup> As a result, the challenge for purchasing materials and receiving them on time will still be the top concern for construction contractors. More retail/ office space is no longer needed as a result of remote work. One Economic Development Officer (EDO) commented, “Loss of rental/ real estate will cause financial hardship for some companies. Strip malls, values of property goes down, no one will invest in empty spaces.” However, another Employment Service provider saw an opportunity here and suggested that the empty downtown buildings can be used for residential units which can help with the current shortage of affordable housing.

Employment service sector will move into the hybrid mode of working. There is no travel required due to teleworking, thus saving the cost of travel, fuel, meals and accommodation. The online delivery of public services will become the new norm. However, training in computer technology will be in demand.

Educational services may face fixed impacts of online/remote learning. For example, one superintendent highlighted that remote learning can result in “loss of sharing of ideas, loss of momentum, [and] no sense of WE.” Online etiquette and safety also need to be improved. Meanwhile, there is an increasing demand for creative and innovative way of teaching. This may lead to a change in Teachers’ College curriculum. In addition, the opportunities for co-op students decreases due to COVID restrictions, but many skill sets that have to be done in person will continue. One Education expert said there will be a “renewed focus on trades”. The shortage of skilled tradespeople have always been a concern. While youth stay in their communities which can fill up the labour shortage, there is a need to promote skilled trades to them as a career choice.

Since remote working becomes prevalent in this scenario, information technology related skills will be highly in demand. For example, many businesses in retail trades will need to invest and improve their web development, e-commerce setting, cyber security, etc. There will also be a high demand for online sales representatives, delivery drivers, and order fillers. Jobseekers will need to develop their digital literacy and soft skills to meet the changing demand of the economy.

## RECOVER STAGE (JANUARY – AUGUST 2021)

Since an effective vaccine is available and accessible to Canadians in 2021, economy recovers by 2022, but looks very different. Mental health issues rise in many sectors including healthcare, agriculture, food services, and education. Based on McKinsey’s analysis, “COVID-19 could result in a potential 50 percent increase in prevalence of behavioral health problems.”<sup>70</sup> Clearly, both employees and employers need and will demand more resources to help them deal with mental health issues. Pfeffer and Williams indicate that “If companies make mental health services more accessible and intervene in the workplace in ways that improve well-being, they will simultaneously make investments that will provide real improvements in employee outcomes and consequently in company performance.”<sup>71</sup>

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69 “2021 Contractor survey.” *Ontario Construction Secretariat*. Accessed March 11, 2021. <https://iconstruction.com/wp-content/uploads/2021/03/2021-Contractor-Survey.pdf>

70 Pfeffer, Jeffrey and Leanne Williams. “Mental Health in the Workplace: the Coming Revolution.” Accessed December 8, 2020. <https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/mental-health-in-the-workplace-the-coming-revolution>

71 Ibid.



As more work can be done remotely, employers can have access to a larger talent pool. If employers in the four county area are open to remote work arrangements and have vacancies eligible for remote work, then they can actually employ people from other cities to fill long term vacancies. During the pandemic, people who are in middle to late careers, have been retiring, changing jobs, quitting and looking for new opportunities. This is a skilled workforce who can be a readily available workforce for the Recovery phase of COVID-19. Meanwhile, there will be a high need for upskilling and reskilling under this scenario, which can increase the demand for employment service programs and providers.

Local agriculture offices need to remain open in order to offer help and answers to farmers. They are always transitioning to meet the changing need. Some people will remain fearful to go/ eat out even though vaccines become available. This fear will diminish as time proves the efficacy of vaccines and herd immunity. With the effective vaccines, international travel restrictions may ease. As a result, farmers may find temporary foreign workers or migrant workers for harvest in the greater talent pool. Under this scenario, positions will also become more automated in agriculture. The expertise required is for equipment technicians who are difficult to find.

Food services will face pent-up demand. People are hungry to meet friends and eat together in restaurants. One Service sector representative said, "Some restaurants will shut down because of the length of time [COVID-19] has taken." However, better restaurants will survive though not as many as before COVID-19. There will be an increasing demand for cooks, servers, and food service supervisors and managers.

Travel within the county goes up while international travel goes down. People from small communities that were working in large urban centres and commuting can now work from home. These are opportunities for rural communities to attract residents. Places such as Bruce Peninsula and Blue Mountain Resort will hire more attendants and program operators to meet the need. The visitors to Blue Mountain for skiing are expected to increase for 2021 and 2022. Beaches will become busy in the summer time as well. Performing artists will be able to entertain large crowds on theatres again. Local festivals such as in Stratford will bring back performers and boost local economy. Over time, arts, culture and recreation will slowly go back to the pre-COVID level of performance.

Manufacturing will hire more labourers and assemblers as the social distancing rule are lifted with vaccines. On the other hand, the pandemic has created an opportunity for schools to expand digital learning. Online delivery of local education and training will become an alternative to in-person learning over the long term.

## EARLY RESILIENCE STAGE (SEPTEMBER 2021)

Automation and the digital marketplace are dramatically accelerated during COVID period and become the main drivers for economic growth. Over 40% of the Canadian workforce works mostly or entirely from home by 2022, even after a vaccine. Remote working has become the new norm and demand for office decreases. Small businesses are severely impacted. The types of consumption/activities that are becoming normal during the lockdown period become normalized in the long term. There is a significant disparity in sectoral impacts and changes with businesses. Employers with 1 to 5 employees could close because their

work cannot be done online. Businesses will reinvent and re-examine themselves and new businesses will arise. In the end, industries that can adapt to social distancing rules and remote working will continue to lead employment growth. Industries such as construction that have responded to COVID-19 by improving sanitation may continue these practices permanently. Health and safety measures applied to sectors such as manufacturing, food services, and healthcare will remain to avoid another similar health threat. After 2023, the economy improves, but emphasizes a new set of businesses that are more digitalized and with more localized supply chains/ customer bases.

The persistence of remote work requires many shifts, “such as investment in digital infrastructure, freeing up office space, and the structural transformation of cities, food services, commercial real estate, and retail. It also risks accentuating inequalities and creating new psychological and emotional stresses among employees, including from isolation.”<sup>72</sup> COVID-19 not only affects the behavioral health of the local workforce, but also the productivity of workers. Digital fatigue will also turn out to be an issue as many employees continue working virtually and the work-life balance becomes vague.<sup>73</sup>

## RECOMMENDATIONS FOR BUSINESSES IN THIS SCENARIO

- Blended models of remote work and on-site work, requiring employers to invest in distributed tools and technologies to retain talent and enhance productivity.<sup>74</sup>
- Increase training for staff to use different digital tools such as online presentations and video meetings. Improve employees’ skills to meet the changing need of the economy.
- Implement work-integrated learning programs to help students better understand your industry.
- Provide a true living wage for workers.
- Improvement in supply-chain risk management, especially lower-tier suppliers. Any disruptions to them can cause disturbances throughout the whole chain.<sup>75</sup>

## RECOMMENDATIONS FOR NEW POLICIES, INVESTMENTS, PROGRAMS AND SUPPORTS

- Upgrade rural internet/ broadband service in order to support online services.
- Provide tax incentives for small businesses in order to survive in the pandemic.
- Affordable housing: people need a place to live to work remotely.
- Financial assistance on the cost of retooling and/ or automation.

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72 Lund, Susan, Anu Madgavkar, James Manyika, and Sven Smit. “What’s Next for Remote Work: An Analysis of 2000 Tasks, 800 Jobs, and Nine Countries.” <https://www.mckinsey.com/featured-insights/future-of-work/whats-next-for-remote-work-an-analysis-of-2000-tasks-800-jobs-and-nine-countries>

73 “Skills and Strategies for the New Economy.” Accessed November 19, 2020. <https://www.theglobeandmail.com/events/article-skills-and-strategies-for-the-new-economy/>

74 Ibid.

75 “Beyond COVID-19: Supply Chain Resilience Holds Key to Recovery.” Accessed April 9, 2020. <https://www.bakermckenzie.com/-/media/files/insight/publications/2020/04/covid19-global-economy.pdf>

- Increase support and initiatives for mental health.
- Funding for college trades training, technical training and equipment.
- Develop a workforce strategy that helps permanent laid-off and long-term jobless workers transition to more sustainable, higher-quality jobs. There is also a need to recruit new workers to back-fill lower skilled entry-level positions such as service and manufacturing. Upskilling and re-skilling workers is essential, as is the need to recruit for entry-level positions in all industries.
- Expand employment and training support to help employment service providers provide better services for all job seekers and provide skills training that match the labour market's needs.

An effective vaccine is not found in 2021 resulting in continued economic slowdowns. The arrival of colder weather, combined with a rise in the number of COVID-19 cases continues to disrupt Canada's recovery. Localized or regional shutdowns continue to flatten or even worsen the path of recovery. This scenario is the most pessimistic and will create the deepest economic recession in Canada since the Great Depression.

All healthcare resources will be used to respond to COVID-19. All staff will be needed and there is no remote working. One healthcare expert added, "All other programs will be left behind and on hold. This will have a significant impact on mental health issues, drug addiction, affordable housing, homelessness, essentially on our most vulnerable sectors. Poverty levels will increase." Restrictions of visitors in long term care homes will impact elders' mental health as well. Without hairdressers, entertainers or group outings, the mental wellbeing of residents will be severely influenced. In general, the demand for RNs, PSWs, other healthcare specialists, life enrichment aides, social workers and mental health counsellors will surge.

For manufacturing, there will be shortages of skilled tradespeople. Some manufactures will also need more people who specialize in information technology. As one Manufacturing representative mentioned, "It will be financially challenging to upgrade equipment and to digitalize and this process will also create some unemployment as they will not need as many employees." Some of small companies will close and some will choose to innovate their products in order to survive.

We have reached out to home builder associations but unfortunately they haven't responded in the time of publishing this report. Under this scenario, we assume that most of construction projects will be on hold due to the severe impact of COVID-19 in the local area though some home renovations may continue. Since most construction work requires hands-on workers on-site, the option of remote work is more limited. Some firms may adopt new technologies to manage COVID-19 such as COVID Screening and Personal Tracking Apps in order to ensure the health and safety of workers and staff. Overall employment for this industry will decrease and there will be supply chain disruptions to construction employers. The demand for carpenters, residential installers, construction tradespeople, etc. will increase to meet the increasing demand for home renovations.

For employment service providers, it will be challenging for them to track certain skill sets in order to bring people in. It is hard for staff to plan programs and delivery services with uncertainties as well. More conversations with local businesses are needed in order to know what employers need. Stress levels will be high. Education will shift and school structure system will change in response to the precautionary health measures. The supply teacher chain will need to be strengthened. Students will lack hands-on experiences when activities such as sports are forbidden and co-operative opportunities become impossible. Without practical and hands-on experiences, these students' post-secondary and career trajectories will be negatively affected. As a result, employment service providers and secondary schools need to work closely with businesses to provide experiential learning programs with e-learning modules.

Since remote working becomes prevalent in this scenario, information technology related skills will be highly in demand. For example, many businesses in retail trades will need to invest and improve their web

development, e-commerce setting, cyber security, etc. There will also be a high demand for online sales representatives, delivery drivers, and order fillers. Jobseekers will need to develop their digital literacy and soft skills to meet the changing demand of the economy.

## RECOVER STAGE (MAY- OCTOBER 2022)

Without an effective vaccine, we still live in the virus-control-mode with social distancing measures and face covering. This keeps international travel suppressed, further hurting industries like air travel, accommodations, and arts and culture. Unemployment and other economic indicators persist at record levels.

Supply chains are troubled. Several local businesses close, generating unemployment. Some businesses will struggle from financial difficulties. The local economic development officers will coordinate with local businesses in order to rebrand businesses and try to get people buying locally. Education, training, and work-based learning are disrupted, which impacts students and jobseekers' opportunity for employment. Employment service provides need to become innovative and responsive to the changing local labour market.

At the same time, there are not enough workers available in the market due to COVID-19 restrictions. Foreign workers will be needed to fill some gaps. This will further challenge the housing and transportation issues. The people who are unemployed will suffer from long term joblessness. One Employment service representative mentioned, "People with disabilities will drop out of the workforce completely, [there are] no jobs available to them." One Service sector representative also said the mental health of staff and restaurant owners will be an issue. As a result, mental health issues will increase. On the other hand, restaurants are closing at an alarming rate and staff are being laid off. There will not be as many restaurants as before but more take-out food. While travel restrictions keep people home, hospitality and tourism sectors will be hit harder. Many hotels and cottages have to close.

Agriculture may lose some producers because of changes which will increase costs that farms cannot afford. One Agriculture expert said, "Livestock industry does not necessarily have huge processing capacity. There are not enough barn spaces. Break in supply chain would be devastating and impact local grocery stores." Meanwhile, people have started to raise their own animals, which will increase the need for more abattoirs in the four counties. There will be an opportunity for farms to add cost-effective facilities. However, new technology will be required and cost of new equipment parts will increase. More importantly, employers who rely on temporary foreign workers or migrant workers for harvest may face shortage of labour due to international travel restrictions. This will add extra pressure on farming employers and the demand for farm workers will rise. According to past EmployerOne surveys, agricultural businesses owners always indicated "not enough applicants" as the top reason for hard-to-fill positions. Such situation may persist or even worsen under this scenario. Farmers may hire more locally or make dramatic changes to maintain their supply chain. Due to teleworking, many positions will become more automated in agriculture. However, the equipment technicians and other related occupations may be difficult to find.

Consumers are reluctant to travel, go to large events and retail spaces. The demand for PPE increases. Manufacturing will face a shortage of labourers and assemblers to produce PPE. Due to COVID-19, the demand for light duty cleaners also increases to ensure safety protocols. SMEs will continue to struggle with the higher costs of operations as a result of social distancing and other precautionary health measures.

## EARLY RESILIENCE STAGE (NOVEMBER 2022)

Due to the longer period of virus-control-mode of living, firms have to further adapt to remote working. Businesses have to redesign and adapt the digital marketplace. Industries that can adapt to social distancing rules and remote working will lead employment growth. Industries such as construction that have responded to COVID-19 by improving sanitation may continue these practices permanently. Health and safety measures applied to sectors such as manufacturing, food services, and healthcare will remain to avoid another similar health threat. For those placed under restrictions, particularly within hospitality, major progress happens only when the effective vaccine becomes available. After 2023, the economy improves, but emphasizes a new set of businesses that are more digitalized and with more localized supply chains/customer bases.

Automation and the digital marketplace are dramatically accelerated during COVID period and become the main drivers for economic growth. Remote working has become the new norm and demand for office decreases. The persistence of remote work requires many shifts, “such as investment in digital infrastructure, freeing up office space, and the structural transformation of cities, food services, commercial real estate, and retail. It also risks accentuating inequalities and creating new psychological and emotional stresses among employees, including from isolation.”<sup>76</sup> COVID-19 not only affects the behavioral health of the local workforce, but also the productivity of workers. Digital fatigue will also turn out to be an issue as many employees continue working virtually and the work-life balance becomes vague.<sup>77</sup>

Long-term unemployment continues to be a problem post-pandemic. According to RBC’s report “Navigating 2021: 21 Charts for the Year Ahead”, historically, few laid-off workers would seek retraining, especially low-skill workers.<sup>78</sup> As a result, it is important to upgrade workforce development services to help the long-term unemployed and permanent job losers retrain and find well-paying jobs.

## RECOMMENDATIONS FOR BUSINESSES IN THIS SCENARIO

- Blended models of remote work and on-site work, requiring employers to invest in distributed tools and technologies to retain talent and enhance productivity.
- More education and marketing for the general public about the local products and services available in the communities.

<sup>76</sup> Lund, Susan, Anu Madgavkar, James Manyika, and Sven Smit. “What’s Next for Remote Work: An Analysis of 2000 Tasks, 800 Jobs, and Nine Countries.” <https://www.mckinsey.com/featured-insights/future-of-work/whats-next-for-remote-work-an-analysis-of-2000-tasks-800-jobs-and-nine-countries>

<sup>77</sup> “Skills and Strategies for the New Economy.” Accessed November 19, 2020. <https://www.theglobeandmail.com/events/article-skills-and-strategies-for-the-new-economy/>

<sup>78</sup> Navigating 2021: 21 Charts for the Year Ahead.” Accessed December 8, 2020. <https://thoughtleadership.rbc.com/navigating-2021-21-charts-for-the-year-ahead/>



- More workplace personal protective equipment and office reconfigurations to accommodate more flexible work arrangements.
- Need of introducing the living wage.
- Improvement in supply-chain risk management, especially lower-tier suppliers.
- Provide support for workers' transportation.

## RECOMMENDATIONS FOR NEW POLICIES, INVESTMENTS, PROGRAMS AND SUPPORTS

- Upgrade rural internet/ broadband service in order to support online services.
- Increase funding to healthcare and staffing levels of healthcare; higher salaries for some front-line workers.
- Increase financial aid to local businesses; financial assistance on the cost of automation, robotics and new technology for businesses.
- More promotion and marketing of small local businesses.
- Establish clear and industry-specific guidelines to help businesses operate through COVID-19. Be consistent with the shared information.
- Develop a workforce strategy that helps permanent laid-off and long-term jobless workers transition to more sustainable, higher-quality jobs. There is also a need to recruit new workers to back-fill lower skilled entry-level positions such as service and manufacturing. Upskilling and re-skilling workers is essential, as is the need to recruit for entry-level positions in all industries.
- Expand employment and training support to help employment service providers evaluate the existing market skills as well as new skills training. Support in expanding their knowledge in different technology.
- Increase support and initiatives for mental health.
- Increase funding for proper classroom equipment and shop classes; financial assistance for computers for families and students.
- More training for practitioners to use new platforms, social media, and marketing.
- Funding for infrastructure development.

## CONCLUSION AND RECOMMENDATIONS

As of March 5th, Health Canada has approved 4 kinds of vaccines: Moderna, Pfizer-BioNTech, AstrZeneca, and Janssen.<sup>79</sup> Grey Bruce and Perth Huron Health units are currently administering vaccines to local residents according to the provincial three-phased vaccine distribution implementation plan. As more vaccines are administered, containment measures can be further relaxed, which can speed up the economy recovery. The Bloomberg Nanos Canadian Confidence Index showed that the consumer confidence “continues on a positive trajectory and has hit a three year high” due to the current vaccination rollout.<sup>80</sup> However, based on the Canadian Survey on Business Conditions, “over two-fifths of businesses expected their profitability would decrease” in the next three months.<sup>81</sup> Furthermore, about one-third of all surveyed businesses expected “fluctuations in demand (31.4%) or insufficient demand (29.2%) to be obstacles for their business over the next three months.”<sup>82</sup> With the positive trend of consumer confidence, we can expect business confidence will rise too. All of these show that our local economy is heading toward scenario 1 or 3 (low impact of the pandemic). However, there is uncertainty regarding the vaccine take-up rate, its effectiveness and side effects, which can make economy recovery vulnerable to any change of the pandemic. Also, the impact of teleworking still remains uncertain.

The four possible scenarios above demonstrate the challenges and opportunities the local market may face as the future unfolds. The four county area needs a rural focused policy strategy that targets its special needs.

It is important to match the demand for and supply of the local workforce (with job postings) to address immediate hiring needs. The potential initiatives include:

- Develop a workforce strategy that helps workers transition to more sustainable, higher-quality jobs, especially permanent laid-off and long-term jobless workers. There is also a need to recruit new workers to back-fill lower skilled entry-level positions such as service and manufacturing.
- Enable workforce training programs to re-skill and up-skill the workforce as needed through the changing demand in the economy. Retrain workers in the hardest hit sectors such as tourism and hospitality to new career paths.
- Focus the job recovery strategies on supporting individuals most affected by job losses, including less-educated service workers and female employees.
- Expand employment and training support to help workers, employment service providers and career counselling professionals evaluate the existing market skills and how to apply these skills and identify new skills training that might be needed.<sup>83</sup>

79 “Vaccines for COVID-19: Authorized vaccines.” <https://www.canada.ca/en/health-canada/services/drugs-health-products/covid19-industry/drugs-vaccines-treatments/vaccines.html>

80 “Consumer confidence hits a high not seen since 2018.” *Nanos*. Accessed March 1, 2021. <https://nanos.co/wp-content/uploads/2021/03/2013-284-Bloomberg-Weekly-Report-Short-Final-W-TABS.pdf>

81 “Canadian Survey on Business Conditions, first quarter 2021.” *The Daily*. Accessed March 5, 2021. <https://www150.statcan.gc.ca/n1/daily-quotidien/210305/dq210305b-eng.htm>

82 Ibid.

83 Tobin, Steve. “3 Steps toward an Inclusive Labour Force Recovery.” Accessed June, 2020. <https://careerwise.ceric.ca/2020/06/12/3-steps-toward-an-inclusive-labour-force-recovery/#.X9aRS9hKg2w>

- Develop training programs with integrated experiential learning opportunities, especially for skilled trades. Promote skilled trades as a career option to youth and their parents.
- Provide schools and training institutions with the knowledge and capacity to help people transition effectively through demand-driven skills and training, toward meaningful, quality, sustainable employment.<sup>84</sup>
- Additional support to organizations in the social economy who are dealing with the short and long term social impacts of the crisis. These are the organizations whose mission is to improve individual and community well-being, including preserving employment.
- Support for people who have lost work (including business owners/ self-employment benefits similar to EI); large-scale fiscal and monetary stimulus will continue to be needed.
- Help workers better navigate national programs and directing them to mental health and childcare services.

Whether the impact of remote working becomes mild or severe, upgrading rural internet/ broadband service is the universal recommendation from stakeholders. Closing existing digital divides between urban and rural areas is essential, especially for small businesses that lag behind in adopting digital technologies. Offering affordable and quality broadband to rural areas is also beneficial to all aspects of the local economy. If teleworking becomes more and more prevalent in the local region, the municipal, provincial and federal governments may consider funding on connectivity and E-commerce. Potential initiatives include:

- Upgrade rural internet/ broadband service to close existing digital divides between urban and rural areas. This is essential especially for small businesses that lag behind in adopting digital technologies. Offering affordable and quality broadband to rural areas is also beneficial to all aspects of the local economy. As a result, there is a need to invest and develop the local digital infrastructure.
- Support the creation of innovative e-commerce business models, ensuring that regulatory frameworks remain flexible enough to accommodate combinations of online and offline business functions. Reduce regulatory uncertainty and promote transparency through information sharing.<sup>85</sup>
- Ensure that SMEs can participate in e-commerce, for example by providing policy, regulatory or financial incentives for sales diversification and establishing a level playing for SMEs relying on the services of online platforms.<sup>86</sup>
- Reduce bottlenecks in the enabling environment for e-commerce, including areas such as connectivity, trade, logistics and postal services.

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<sup>84</sup> Ibid.

<sup>85</sup> "E-commerce in the Time of COVID-19." Accessed October 7, 2020. <http://www.oecd.org/coronavirus/policy-responses/e-commerce-in-the-time-of-covid-19-3a2b78e8/>

<sup>86</sup> Ibid.

- Establish clear guidelines and rules for operating, encouraging businesses to open and provide a safe environment for customers.

Other initiatives include:

- Increase funding to healthcare and staffing levels of healthcare.
- Deliver clear and consistent industry specific guidelines to help businesses and organizations better prepare for themselves.
- Provide tax incentives for small businesses in order to help them survive and thrive during and after COVID-19.
- Financial support to independent and other business owners who are not qualified for COVID related government assistance; enhance their access to capital.
- Offer affordable housing in the local area: people need a place to live to work remotely.
- Encourage people to buy local.
- Financial assistance on the cost of retooling and/ or automation.
- Increase support and initiatives for mental health.

There are also several recommendations for businesses who are struggling during this difficult time:

- Provide blended models of remote work and on-site work, requiring employers to invest in distributed tools and technologies to retain talent and enhance productivity, which needs the government's financial support.
- Increase training for staff to use different digital tools such as online presentations and video meetings.
- Collaborate with local organizations that offer skill development, soft skill development, and second career training to retain current employees and promote career growth.
- Improvement in supply-chain risk management, especially lower-tier suppliers. Any disruptions to them can cause disturbances throughout the whole chain.
- More education and marketing about the food industry and local markets.
- Provide workers with a true living wage.

## APPENDIX A

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