

Yesterday's Gone:

Exploring possible futures of Canada's labour market in a post-COVID world



February 2021

Table of Contents

1 Introduction

2 Methodology

3 State of Canada's Labour Market in 2020

4 Future Trends

5 Conclusion

1

Introduction

Introduction

We're living in uncertain and strange times, making it especially challenging to plan for the next year, never mind the next decade. And yet it is critical in our current economic climate that we understand the breadth of potential changes ahead, to better prepare workers for the future of Canada's labour market. *Yesterday's Gone* outlines 8 megatrends and 34 related meso trends that have the potential to impact employment in Canada by 2030. The goal of this research is to explore these technological, social, economic, environmental, and political changes, including those influenced by COVID-19, to inform the design of skill demand programs and policy responses.

This research builds off work released in March 2019 as part of the *Employment in 2030* initiative, *Turn and Face the Strange*, which identified 31 broad trends impacting the future of employment. This report revisits many of these 31 trends, and explores how each has continued, or shifted in direction. Some of the original 31 trends have lessened in relative importance over the last two years and therefore have not been reprised.

This report is not meant to be a comprehensive overview, a prediction of the future, or a deep analysis of any one trend. It is meant to spark exploratory thinking and consideration of the potential for different trends to interact in ways that are not always obvious. Furthermore, it is important to consider how these trends may impact populations and demographic groups differently, as their impacts may be unequal.

Yesterday's Gone is part of a broader initiative, *Employment in 2030: Action Labs*, which seeks to support the design of policies and programs to help workers gain the skills and abilities they need to be resilient in the next decade. This project explores how COVID-19 might impact the trends, foundational skills, and abilities that were identified in the *Forecast of Canadian Occupational Growth* (FCOG), launched by the Brookfield Institute for Innovation + Entrepreneurship (BII+E) in May 2020. Fundamentally, this project seeks to translate future-looking labour market information, including from the FCOG and this report, into action by co-creating novel, regionally relevant solutions that leverage community assets to help more people build the skills that will be critical for the future of work.

If you are interested in learning more about the project, details can be found [here](#).

2

Methodology

Methodology

The following trends were identified using a strategic foresight method called horizon scanning. This is a technique for gathering broad emerging information that can be used to identify possible changes impacting the future of any given subject. Horizon scanning helps to identify weak signals of change and emerging opportunities for forward-looking policy and to assess prospective policy risks, security threats, and public vulnerabilities.

Signals of change were identified using the STEEPV conceptual framework, which categorizes data based on whether its origin of potential change is societal, technological, economic, environmental, political, or values-based.

Over the course of three months, we scanned secondary data points from academic journals, popular media, patents, and fringe news sources, and surveyed labour market experts to identify possible signals of change. These 600+ signals of change were synthesized into the following 8 megatrends and 34 related trends, which were selected using the following criteria:

- + Domain relevance: Changes with the potential to impact the future of Canada's labour market
- + Time horizon: Changes that will have impact in the next ~10 years
- + Breadth: Changes from a range of social, technological, economic, political, and environmental drivers
- + Magnitude of change: Changes that have the potential to significantly alter the future of Canada's labour market
- + Maturity: Changes that represent a range of maturity, from weak signals (with minimal evidence) to mature trends

On November 24 and 26, 2020, BII+E hosted a National Expert Panel where 50 labour market experts provided feedback on these trends and discussed their potential labour market implications. This report synthesizes the findings from the horizon scan and the expert panel discussions.

3

State of Canada's Labour Market in 2020

State of Canada's Labour Market in 2020

COVID-19 has caused significant disruption to Canada's labour market over the last nine months. It has become even more important to connect people with jobs, and employers with talent, as Canada's economy recovers. Here are a few of the disruptive impacts of COVID-19 to keep in mind as we consider how different trends may evolve, and how best to prepare workers for the future. (The following summary is based on Statistics Canada data released December 2020).

Impacts:

- + Alternating openings and closures have caused turbulence or job losses in certain sectors.
- + A shift to digital technology may be a necessary condition to succeed in the current climate.
- + Automation of tasks tends to increase during downturns, and there is already some indication that the pandemic has kickstarted a new wave.

Employment:

- + The country saw a record of 2.6 million unemployed people, but has steadily recovered to 1.7 million, although recent second wave closures have played a role in slowing this recovery. Approximately 300,000 unemployed workers left the labour force altogether in November alone.
- + On average, employment for "core age" (25–54 years old) men and women has recovered to within 1.7% of pre-COVID-19 levels. However:
 - Women have seen a higher decline in full-time (-2.4%) and part-time (-5.2%) employment than men (-1.7% and 1.5% respectively) since November 2019. Mothers have also been more strongly affected than fathers by work absences.

- + Employment for young workers remains 11% below February 2020 levels, and youth account for a fifth of long-term unemployment.
- + The unemployment rate for people of colour, including Chinese (+5.9%) and Black (+3.8%) workers has increased significantly more than for non-Indigenous, non-minority people when compared to October 2019 (+2.6%).
- + Employment among Indigenous peoples has been slower to recover amid the disproportionate impacts of the pandemic.

Industries:

- + Total economic activity in September was 5% below pre-pandemic levels. Compared with the third quarter of 2019, the GDP of businesses was down 6.9%.
- + The public sector, professional services, manufacturing, arts and entertainment, wholesale trade, and retail have recovered some ground, but remain below February levels. Yet lockdown measures enacted and extended in areas of Canada may impact these industries strongly through the end of 2020.
- + The mining, quarrying, and oil and gas extraction sector is fluctuating, driven by changes in oil sands extractions, which experienced a low level in August last seen following the 2014 crash in oil prices and the Fort McMurray wildfire. This has also impacted supporting activities, which grew in September but remain just below half of February levels.

4

Future Trends

Megatrends

Based on the trends identified, significant themes or megatrends emerged that form the broader categorization of this report. These megatrends represent higher-order global changes that are currently present and expected to continue into the next decade. In total,

8 megatrends are described, with 34 associated meso trends that highlight specific dynamics related to the megatrends.

The following section offers a brief description of each megatrend and its high-level implications. For each meso trend, we have included the following information:

- + A brief description of the change
- + A snapshot of what the change could mean for life in 2030
- + Potential labour market implications associated with the trend
- + Maturity (level of awareness) of each trend

Megatrends:

OUR LIVES ONLINE

CAPITALISM IN QUESTION

TECHNOLOGY TO THE RESCUE

CLIMATE IN CRISIS

RECONCILIATION + INCLUSION

FINDING MEANING + WELL-BEING

SHIFTING POWER

EVOLVING POPULATION

Trend Index

OUR LIVES ONLINE

- + [Permanent Remote Work](#)
- + [Rural Boom](#)
- + [Post-Secondary, Disrupted](#)
- + [Immersive Digital Leisure](#)

CAPITALISM IN QUESTION

- + [Degrowth Movement](#)
- + [Gender Equality Rollback](#)
- + [Workers First](#)
- + [Public Services with a Price Tag](#)

TECH TO THE RESCUE

- + [Automation Nation](#)
- + [Responsible AI](#)
- + [Space Jam](#)
- + [Humans, Augmented](#)

CLIMATE IN CRISIS

- + [Fires, Floods, + Other Disasters](#)
- + [Green Energy Revolution](#)
- + [Air + Water Contaminated](#)

RECONCILIATION + INCLUSION

- + [Road to Reconciliation](#)
- + [Land Back](#)
- + [Anti-Racism in the Workplace](#)

FINDING MEANING + WELL-BEING

- + [Back to Nature](#)
- + [Crisis Breeds Creativity](#)
- + [Workaholic Extinction](#)
- + [Fear of Pathogens... + People](#)
- + [Vaccine Identity](#)
- + [Another Pandemic](#)

SHIFTING POWER

- + [Bigger Business, Richer Execs](#)
- + [World War](#)
- + [America vs. America](#)
- + [Deglobalization](#)
- + [Gen Z Takeover](#)
- + [Canada Breakup](#)

EVOLVING POPULATION

- + [Working Retirement](#)
- + [Free Childcare](#)
- + [Birth Strikers](#)
- + [Digital Residents](#)



Our Lives Online

Our Lives Online



From spending Saturday nights streaming Netflix at home, to a growing adoption of remote work policies, more and more Canadians have been making the shift from in-person activities to virtual ones. COVID-19 has significantly accelerated this shift, meaning that more and more Canadians are living, working, and playing online. However, not all Canadians have sufficient access to internet or digital skills to participate in the online economy, while others may prefer face-to-face engagement when possible, which over time may limit the growth of this trend.

RELATED TRENDS:

- + Permanent Remote Work
- + Rural Boom
- + Post-Secondary, Disrupted
- + Immersive Digital Leisure

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Prolonged and extended remote work arrangements may impact recruitment and employer–employee relationships.
- + Canada’s workforce may no longer be concentrated around major urban areas as workers have the flexibility to work remotely.
- + In-person skills development and training programs may no longer be the norm, significantly impacting Canada’s post-secondary institutions.
- + As Canadians spend more time in immersive digital spaces, social skills may evolve and digital skills may increase.

Permanent Remote Work



According to Statistics Canada, 40% of workers shifted to working from home as a result of pandemic lockdowns. This is expected to continue once restrictions lift. In May 2020, Shopify announced they would be digital by default and in July 2020, the Conference Board of Canada announced that it was selling its head office. The concept of work-from-anywhere is also emerging, with Barbados offering 12-month remote work visas for visitors. While remote work enables greater flexibility, Canadians are also working more, with 55% of remote employees working through the weekend. As companies and workers adjust to the new reality of virtual and geographically distributed teams, this may contribute to changes in talent recruitment, a greater blurring of lines between work and leisure, and social isolation. In addition, it may impact urban economic hubs—an example being Calgary, whose downtown was already experiencing high office vacancy rates, and hit nearly 30% in September 2020. This may also mean the loss of mainstreet retail and restaurants, as well a reduced demand for work-related travel and conferences.

However... many essential workers are unable to work remotely, 48% of Canadian employers do not intend to continue their flexible working policies once the pandemic is over, and workers may face pay cuts, with Facebook introducing reduced pay if employees move to cheaper areas to work from home.



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IN 2030 THIS COULD MEAN:

- + There may be greater societal polarization between people who are able to work from home (with flexibility) and people who are not.
- + Employers may need to find new ways to establish institutional culture and enable knowledge transfer, and this may result in new types of jobs.
- + Workers may be able to participate in “collaborative telepresence,” making a full sensory immersion possible, even from different locations.
- + Time zones may become a leading consideration in hiring rather than residence in a specific country or city.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be a shift to global workforces, with implications for tax policy.
- + Growth in services to support virtual collaboration may emerge, such as new virtual collaboration spaces and virtual interface design to support innovation and creativity.
- + There could be growth in mental health–related services to respond to social isolation and burnout as well as the loss of social capital and interpersonal skills.

Rural Boom



Approximately 18% of Canada's total population lives in rural areas, a number that has been on a steady decline since the 1960s. However, since the pandemic began, Ontario, British Columbia, and Atlantic Canada have all seen a record number of Canadians leaving big cities for greener spaces. Given skyrocketing urban housing markets, increasing remote work opportunities, and growing desires for bigger houses (for home offices and remote learning), Canada's rural areas may experience unprecedented population growth in the coming years. Local economic development opportunities may follow as demand for restaurants, shops, services, and other businesses is created, while growth in rural-based start-ups may also occur, as signaled by the decision by Ryerson's tech accelerator, DMZ, to explore expansion across Canada with a focus on rural locations.

However... Montreal house prices are up 12.5% from last fall, and the Toronto real estate market saw its biggest September on record, suggesting not everyone is ready to move out of urban areas. Furthermore, not all workers have the ability to work remotely, the digital skills necessary, or the financial means to make the move.



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IN 2030 THIS COULD MEAN:

- + There may be greater demographic diversity in Canada's rural communities.
- + There could be an increase in rural housing prices while cities become more affordable.
- + Expansive growth of digital public services and supportive broadband infrastructure may occur.
- + There may be a return of thriving mainstreets in rural communities across Canada.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + As employers become more comfortable managing a remote workforce, there may be an increase in cross-border hiring, and subsequent changes to employment eligibility laws.
- + Employers might need to compete for talent based on their ability to provide a thriving remote work culture.
- + Rural governments may explore new forms of taxation for home offices to cover service costs associated with population growth.

Post-Secondary, Disrupted



There are 103 universities across Canada, employing 310,000 people and with 1.4 million students participating in programs. However, the traditional in-person post-secondary experience is shifting to online instruction, using various platforms including virtual and augmented reality. According to ABI Research, global spending on virtual reality in education will reach \$640 billion by 2023. Employer requirements and investments in training are also changing, with companies like Google offering six-week career certificates that they accept instead of a four-year degree, and some states reducing occupational licensing requirements. Together, these changes may result in significant changes to the post-secondary ecosystem over the next decade.

However... enrollment at post-secondary institutions is continuing at almost the same rate as before the pandemic.



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IN 2030 THIS COULD MEAN:

- + Workers may have non-linear careers, creating an even greater demand for micro-credentials, tailored learning products, and services for mid-career workers.
- + Reverse internships could become the norm, where interns pay employers for relevant experience.
- + Instead of credentials, AI could increasingly be used to determine compatibility during the hiring process, further impacting post-secondary learning expectations.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + The traditional post-secondary education sector may be disrupted, including through reduced reliance on physical infrastructure and faculty in major cities across the country, in favour of digital environments and learning from anywhere.
- + A wider, global pool of potential students who might not otherwise have been able to access certain training programs may gain access, increasing Canada's talent pool.
- + A continued expansion of virtual learning environments and workplaces may create a greater demand for social, emotional, and metacognitive skills.

Immersive Digital Leisure



Rapid technological advancements and hyper-realistic user experiences have led to a recent boom in demand for digital recreation. The Esports market, for example, is expected to be worth over \$600 million by 2022. COVID-19–induced physical distancing requirements and more downtime have accelerated the adoption of escapist entertainment like VR, immersive gaming, and 3D creation platforms like Roblox, which has spiked to over 250 million monthly users this year. The restrictions on crowds at in-person events has led to many creative virtual fan experiences, including a Travis Scott concert that took place in Fortnite, Balenciaga’s fashion show that occurred fully in VR, and sports leagues like the NBA bringing fans virtually into stadiums to simulate the in-person experience. 2020 has also seen the incorporation of these technologies beyond the entertainment sector, with VR corporate team-building events, for example. This could increase demand for digital fluency in extended reality (XR) environments, while online gaming, telecoms, and digital accelerators may all experience growth.

However... entertainers are finding creative solutions for in-person shows. For example, the Flaming Lips performed a concert in bubbles, to a crowd in bubbles.



WEAK

EMERGING

MATURE



IN 2030 THIS COULD MEAN:

- + There could be increased mental health concerns, with more people spending time alone.
- + There could be a rise in digital conferences and VR tourism that may reduce both business and leisure travel.
- + Some people might work entirely in virtual or augmented reality.
- + The adoption of DIY immersive digital content creation could disrupt and democratize the entertainment and video game industries.
- + Written (and not verbal) communications could become the norm.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + This trend may lead to the mass gamification of education, work, and retail, which could have significant impacts on skill requirements in these areas.
- + Active engagement with immersive digital tools in recreational environments as a learning tool, for example in rural areas, could lead to greater diversity in supply of XR-fluent talent.
- + A decline in in-person interaction could lead to an evolution of workplace social skills.



Capitalism in Question

Capitalism in Question



For some, capitalism has resulted in significant economic benefit, yet for many, it has resulted in low wages, unsafe working conditions, precarious work, and environmental exploitation. Capitalism has never existed without pushback, but this conversation has recently grown in prevalence, especially given growing climate change concerns and the noted unequal economic impacts that COVID-19 has brought. Growing calls to “build back better” and to revisit the social contract, and the exploration of a wealth tax to finance COVID-19 recovery, signal that capitalism may face significant reform in the coming years.

RELATED TRENDS:

- + Degrowth Movement
- + Gender Equality Rollback
- + Workers First
- + Public Services with a Price Tag

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + The concept of “degrowth,” which values social and ecological goals over economic growth, may gain in popularity if the “build back better” movement advances.
- + Following the unequal economic impact of COVID-19 on women, the unpaid care economy may be valued differently and gain new support.
- + New wealth distribution policies such as Universal Basic Income may be introduced to provide more equitable wage supports for workers.
- + An increase in public spending to support a more equitable economic recovery may lead to future governments seeking to reduce spending to manage deficits through cuts and privatization.

Degrowth Movement



The OECD released a new report, “Beyond Growth: Towards a New Economic Approach,” that challenges the assumption that economic growth is good for everyone. John Perkins, an economist and author, makes an argument for transitioning from a “Death Economy” to a “Life Economy” that cleans up pollution, regenerates devastated ecosystems, recycles, and develops technologies that restore resources. And in April 2020, 170 Dutch academics put together a five-point manifesto for economic change based on degrowth principles, while New Zealand introduced a federal budget that prioritized quality of life over economic growth. The concept of degrowth is focused on ecological goals and defines new metrics of economic progress. This has the potential to create a paradigm shift from a focus on GDP growth to a new system that prioritizes human well-being, environmental sustainability, and economic resilience.

However... economic growth continues to be the dominant thinking, including in Canada, where economic growth remains a dominant priority in government budgets and policy statements.



IN 2030 THIS COULD MEAN:

- + Governments may start tracking well-being and equity impact as important metrics.
- + More employee-owned companies may emerge as an alternative to large multinational corporations.
- + With a focus on happiness, leisure, walkability, and green space, medium-density communities that support these priorities may be in greater demand.
- + There may be a greater emphasis on work-life balance and happiness, and four-day work weeks may become the norm.
- + Reduced ownership may mean new service-based business models emerge.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be a greater demand among companies for workers with expertise in ESG (Environmental, Social, Corporate Governance) strategy.
- + Reduced consumption, and a focus on minimalism, may result in reduced demand for retail and hospitality industries.
- + National sources of wealth could transition from selling resources and physical products to a greater emphasis on intellectual property.

Gender Equality Rollback



In 2019, Canadian women made \$.87 for every dollar made by men, a slight increase from 2018, not including unpaid work associated with child and elder care. Gender equality in the workplace has been a significant focus in recent years, illustrated by the 2017 Women's Marches, #MeToo, and record number of women in political power. However, coined the "She-Cession," the COVID-19 economic crisis has disproportionately affected women across all industries. Furthermore, mothers have been overwhelmingly responsible for supervising remote learning, and working mothers in particular are leaving the workforce at unprecedented rates in 2020. While these events may be short-term, it is possible that COVID-19 may have long-term employment implications for women and women-dominated sectors.

However... the UN and other global institutions are calling for a gender-focused COVID-19 recovery plan, putting women and girls at the centre, which may limit the impact of this trend. Additionally, free childcare could also significantly impact the direction and evolution of this trend.



WEAK

EMERGING

MATURE



IN 2030 THIS COULD MEAN:

- + Because of the economic impact of women leaving the workforce for a year (or more), women may experience significant career pressure, making it less socially acceptable to take maternity leave, leading to declining birth rates or growing demand for infant childcare options.
- + There may be more single-income families should women decide to focus on unpaid child and elder care, resulting in a decrease in annual household income among Canadian families.
- + Potentially even fewer women will be found in decision-making positions.
- + There may be increased pressure on governments to increase gender parity policies and gender-based budgeting.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be continued barriers to workplace inclusion and equity, particularly for women who are Black, Indigenous, and people of colour.
- + Employers may become less transparent about salary range information if women have less power to push for equal pay and wage accountability.
- + Sectors traditionally dominated by women may find gender parity over time as demand drives recruitment of men.
- + There could be more women entrepreneurs or women engaged in gig work to maximize their flexibility, but less social and health insurance support for families.

Workers First



As COVID-19 spreads across the country it continues to disproportionately impact the most vulnerable, including gig, part-time, and front-line workers. More broadly, the health, social, and economic crisis has exposed the gaps in the current social support system in place in Canada. This has put pressure on companies to improve working conditions and compensation. While many of these changes have been temporary, such as hazard pay, firms like Chapman's have made their pandemic pay boost permanent. Additionally, formerly fringe policy ideas, such as Universal Basic Income (UBI) and a wealth tax, have been brought into mainstream politics. Fifty senators signed an open letter to the Prime Minister calling for a basic income, and the Federal Liberal Party has discussed both policies publicly as approaches to spur Canada's economic recovery. The pandemic has led to a new understanding of what society views as essential work, which may lead to a restructuring of worker benefit and compensation structures in the longer term.

However... some concerns are being raised about spending on worker protections contributing to rising government debt levels, and Fitch Ratings downgraded Canada's triple-A credit rating in June, dropping the country to an "AA+" rating over what it called "the deterioration of Canada's public finances" due to COVID-19.



WEAK

EMERGING

MATURE

IN 2030 THIS COULD MEAN:

- + Adopted policies like UBI may lead to increased entrepreneurial and educational pursuits.
- + There may be more flexibility for workers in terms of scheduling and location, which could impact where people choose to live.
- + A prioritization of well-being in the workplace could lead to more benefits and supports for workers, such as in physical and mental health.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + A diminished luxury class could result in reduced demand for high-end goods, services, and real estate.
- + Wealth distribution policies could provoke high-net-worth individuals to leave the country, potentially contributing to a loss of talent.
- + The establishment of minimum standards for non-traditional workers could further increase the supply of workers in the gig economy in lieu of traditional labour.
- + Conversely, unionization pressure may incentivize large gig-work employers to reduce or eliminate operations in Canada.

Public Services with a Price Tag



The economic crisis brought on by COVID-19 has led to record levels of government debt. In Canada, the pre-pandemic combined federal and provincial debt totalled \$1.4 trillion. This debt has rapidly grown, with governments borrowing another \$300 billion so far in 2020. In the coming years this could result in cuts to services across Canada potentially leading to a wave of privatization. Already, there are many signals across the country indicating this possibility, with Alberta's United Conservative Party voting in favour of privatized healthcare, the undermining of public education by the use of pandemic pods, and the proposed privatization of parks and liquor in Manitoba and the move to privatize cannabis in New Brunswick. Given that approximately 20% of Canada's labour force works in the public sector, privatization could have significant impacts on the labour-market landscape, while more private options for health and education could have significant societal implications.

However... the disproportionate number of deaths from privatized long-term care homes has increased demands for nationalization across Canada.

IN 2030 THIS COULD MEAN:

- + Lower public sector budgets might generate more innovative public-private partnerships or motivate new approaches to taxation.
- + Access to public services in smaller communities may become constrained.
- + Privatized healthcare and education could lead to more polarized and unequal societies and reduced social mobility.
- + More private offerings may emerge for individuals willing to pay for additional services.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Pressure on public sector budgets could reduce the number of mid-skilled public service jobs, which might further polarize the skill distribution.
- + Privately owned citizen service offerings could continue to expand, for example in last mile transport, effectively taking over some government services.



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Tech to the Rescue

Tech to the Rescue



Technology's pervasiveness is changing how we work, communicate, learn, collaborate, exercise, sleep, and live. In Canada, as in many other advanced economies, the growth of the tech sector has been a core economic growth strategy, especially for local economies looking to diversify their natural resource reliance. Technological innovations have been heralded as providing solutions to key global issues, such as climate change and COVID-19, as well as a way to create labour efficiencies. The growth of the tech sector has not been without pushback, as illustrated by the public concern over Sidewalk Toronto's proposed smart city project on the waterfront (now cancelled), concerns over long-term impacts of digital data collection, and a push for new data protections.

RELATED TRENDS:

- + Automation Nation
- + Responsible AI
- + Space Jam
- + Humans, Augmented

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + An increase in the adoption of labour automation technologies may impact the types of tasks employees are responsible for and the general nature of work.
- + Growing concern around big data, artificial intelligence, and data privacy may result in a push for ethical technology use and subsequent regulation changes.
- + Growing advancement and investments in space technology may result in a new "space economy" and the emergence of a range of new economic opportunities.
- + Developments in brain enhancement technologies could mean that humans and machines work together in new ways, changing the way we learn new skills and complete tasks.

Automation Nation



Conversations about the changing labour market often focus on the impacts of technological changes, such as labour automation technologies. In Canada, industries such as food services, manufacturing, transportation, and mining all have strong potential for being impacted by labour automation technologies, and potentially half of Canadians' jobs may be affected in the next ten years. Research shows that the adoption of automation accelerates during recessions, and a survey of 800 executives found that 50% have accelerated automation in their companies due to COVID-19, suggesting the impact may occur faster than previously thought. This impact may not necessarily be negative for Canadian workers, as Statistics Canada reports that Canadian companies who invest in automation technologies have 15% more workers, suggesting that automation does not necessarily result in job loss.

However... Canada has traditionally been slow to adopt new technologies.



IN 2030 THIS COULD MEAN:

- + Automated transportation and logistics services such as delivery drones and self-driving trucks and cars may become more prevalent.
- + Automated cafes and restaurants could become more popular.
- + Canadians may seek out low-tech experiences to counter or balance their regular engagement with automated technologies.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Companies may need to attract talent capable of onboarding and engaging with new automation technologies.
- + While some jobs could disappear, other jobs could change and new jobs could emerge that leverage and complement automation-related applications.
- + Growth in advanced manufacturing and robotics may require more high-skilled talent.

Responsible AI



The adoption of artificial intelligence (AI)—the simulation of human intelligence in machines—is rampant across the world. The global AI market size was estimated at \$52 billion in 2019 and is expected to grow to \$81 billion by 2027. Society is coming to terms with the ubiquitous nature of AI and the impact it has on our lives. Following student protests in August 2020, the UK stopped using a biased algorithm that discriminated against pupils from poorer backgrounds to generate A-Level exam results, and in May 2020, Dutch courts ruled an algorithmic risk assessment technique that ostensibly detects fraud is a violation of human rights. Growing public awareness of the negative effects of AI and algorithms could lead to further pressure on technology companies to ensure AI is designed responsibly and ethically, and on countries to enact regulation.

However... a report from Oxford Insights and the IRDC has warned that some of the world's most technologically advanced countries are not prioritizing and practicing responsible AI, and Google fired a leading AI ethicist for conducting research critical of the company.



WEAK

EMERGING

MATURE

IN 2030 THIS COULD MEAN:

- + AI literacy—and understanding the social consequences of algorithms—could become a core aspect of education.
- + Increased public and government criticism of unethical AI practices could result in the break up of Big Tech companies and a mass rejection of AI-based platforms and tools.
- + Trust of Big Tech could reach an all-time high if ethical AI and responsible data collection practices become the norm.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + As ethical tech design becomes increasingly important, people trained in the humanities and critical thinking may become more in demand in AI professions.
- + If codes of conduct and certifications in ethical AI design become the norm and a requirement, there could be a slowdown and pivot among AI start-ups as they adjust to new norms or regulations.
- + There might be an increase in demand for AI ethicists and positions that train product development teams in equity, diversity, and inclusion.
- + There may be more demand for diverse tech talent in an effort to counter AI biases.

Space Jam



To date, space travel and work in outer space is reserved for trained astronauts, of which Canada only has four. However, as tech billionaires like Elon Musk and Jeff Bezos launch space-related business ventures, Canada sees new investments in our space industry, and millions of exoplanets are discovered, we may see an increase in space economic development in the future. Already, NASA is working to attract business out into space, and Space Port Japan Association, Dentsu, Canaria, and Noiz Architects have proposed SPACEPORT CITY, a major transportation hub designed to support the commercialization of space travel. Life in space may be able to offer everything we need, thanks to the discovery of water and the technology to 3D print infrastructure in space, and perhaps equally important in our current times, the creation of internet for space.

However... the carbon emissions associated with a rocket launch to space are equivalent to five transatlantic flights, which may, given the climate emergency, offer a case against expanded space travel in the future.



WEAK

EMERGING

MATURE

IN 2030 THIS COULD MEAN:

- + Wealthy Canadians may choose to vacation in space.
- + Should the costs associated with space travel reduce over time, space could be used to house sick individuals who require quarantine or prisoners.
- + Space garbage could become a major environmental advocacy topic.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Increase in demand for aeronautical engineers.
- + Growth in products and services suitable for space living, such as packaging and compact living technologies.
- + Increase in spin-off technologies that are developed for space, such as 3D infrastructure printing, but have value and use in everyday life.

Humans, Augmented



Technology development is underway that may make human enhancements possible, including brain implants, smart contact lenses, custom gene-editing, and tracking devices. Neuralink, Elon Musk's brain-computer business, unveiled a pig with a chip in its brain and a start up in the United States, Kernel, raised \$53M to develop a new generation of brain technology. Headsets are being developed so that companies can track employee stress, focus, and attention. While many of these innovations are in the R&D phase, 54% of US adults foresee a future where computer chips will routinely be embedded in our bodies. In the future, this may mean digital enhancements are readily accessible and workers obtain new skills or enhance their existing skills through tech devices.

However... according to a Pew Research study released in 2016, 66% of Americans polled say they would "definitely" or "probably" not want to get a brain chip implant to improve their ability to process information.



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IN 2030 THIS COULD MEAN:

- + Cognitive enhancements may come into use, such as mixed-reality glasses combined with AI that can provide useful inferences based on what you are seeing and doing.
- + The labour market may involve 24/7/365 worker and employer surveillance, accompanied by debates on bodily autonomy, privacy concerns, and ethical issues, and by an enhanced focus on cybersecurity.
- + Opportunities may emerge for people living with disabilities in the form of teleoperated robots and telepresence at work, opening up new labour market opportunities.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Growth in a number of new sectors (software + hardware), including virtual environment design, gameful interfaces, real-world applications of AI, high-tech product development, and manufacturing of implants, components, and prosthetics.
- + Extended health care services such as optometry, physiotherapy, and massage therapy could increase in demand as Canadians adapt to cognitive enhancements and their impact on the human body.



Climate in Crisis

Climate in Crisis



In 2020, Canada's last intact ice shelf broke off, the world missed biodiversity targets, and the Atlantic Ocean saw its hottest decade in 3,000 years. Evidence of our climate in crisis increases every day, as do opportunities in the green economy. The world has seen a wave of activism—from Greta Thunberg's year-long climate strike to young American voters prioritizing climate change in the 2020 election. Even during COVID-19, climate change remains a main concern of Canadians. However, some environmental protections and reporting have been suspended during COVID-19 emergency orders, which has some Canadians concerned.

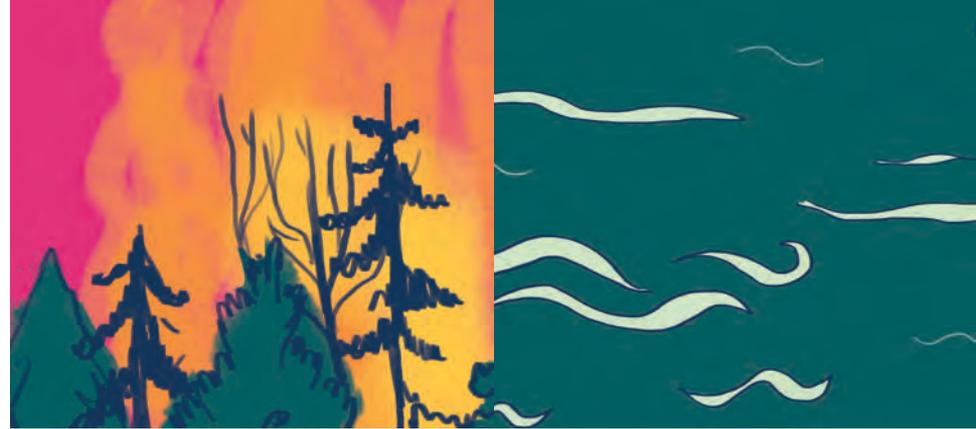
RELATED TRENDS:

- + Fires, Floods, + Other Disasters
- + Green Energy Revolution
- + Air + Water Contaminated

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + A continued increase in wildfires and flooding could mean an increase in demand for first responders and subsequent growth of disaster management public spending.
- + Should Canada welcome international climate migrants, there may be an influx of available labour.
- + Support and investment in low-carbon and carbon neutral technologies may continue to increase.
- + Environmental contamination and commodification of basic necessities such as air and water may result in new protections, impacting Canada's agricultural and natural resource sectors.

Fires, Floods, + Other Disasters



With 537 fires, 2020 has been the worst year in a decade for forest fires in Quebec. From wildfires in Australia, California, and Oregon, severe flooding in South Sudan, massive hail storms in Calgary, and potential glacial lake floods, climate shocks are intensifying globally. These shocks are costly, resulting in millions of dollars of damage to infrastructure, and potentially billions in insurance claims. It is also resulting in major disruptions, as utility companies such as Pacific Gas and Electric cut power to customers in an effort to prevent sparking fires. It is also estimated that up to 1.2 billion people could be displaced from their homes by 2050, demonstrating the breadth of impact climate shocks may have in the future.

However... recently, some Canadian regions have seen less forest fires, suggesting severity may be variable and have uneven impact globally.

IN 2030 THIS COULD MEAN:

- + There may be an increase in climate-related migration and displacement of communities based on climate shocks and stressors.
- + Regions and communities that address climate impacts and invest in proactive disaster management may be more attractive to both businesses and workers.
- + Climate disasters may have a disproportionate impact on our most vulnerable populations, requiring governments to respond with emergency-based support programs and disaster-related pay premiums.
- + Insurance and financial services may adjust insurance policies so that consumers are responsible for risks associated with proximity to potential climate disasters.

POTENTIAL LABOUR MARKET IMPLICATIONS:

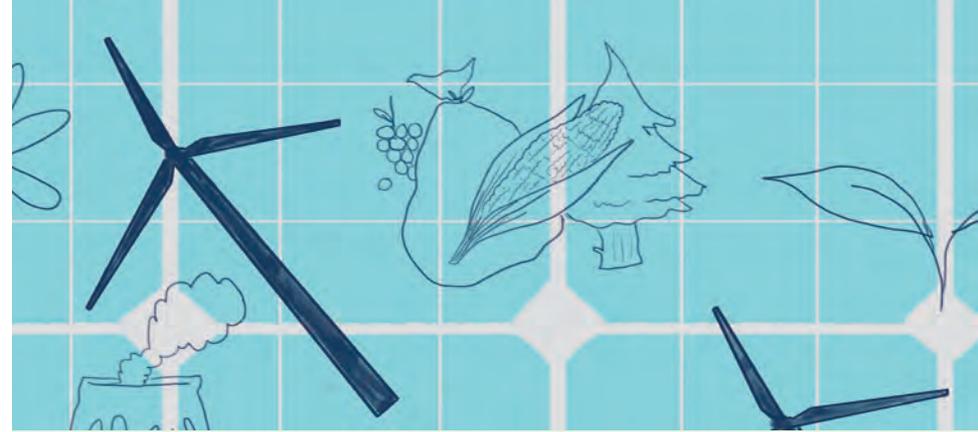
- + Potential growth in disaster management-related industries and products, and a career in disaster management may become a mainstream occupation.
- + With an increase in climate-related disasters over time, there may be growth of green economy industries and occupations.
- + Employers that require workers to be based in high-risk areas may have to adjust compensation and employee protection.

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Green Energy Revolution



Producing carbon-free energy has never been cheaper. In fact, the IEA claims that solar is now the cheapest electricity in history. Additionally, the urgency of the climate crisis and shifting consumer preferences are creating an enormous economic opportunity in green energy and carbon-free transportation. In Canada, investment in the green energy sector is expected to increase 46% by 2030, while recent private and public sector support in electric cars and trucks from across the political spectrum, such as automaker Ford's \$1.8 billion investment that was backed by both the Ontario Conservatives and Federal Liberals, suggests significant development in carbon-free transportation over the coming decade. This may lead to an employment boom in green energy-related occupations and new demand for relevant skills.

However... car sales surged in San Francisco during the pandemic, and Alberta lifted its oil product curtailment program in December 2020.



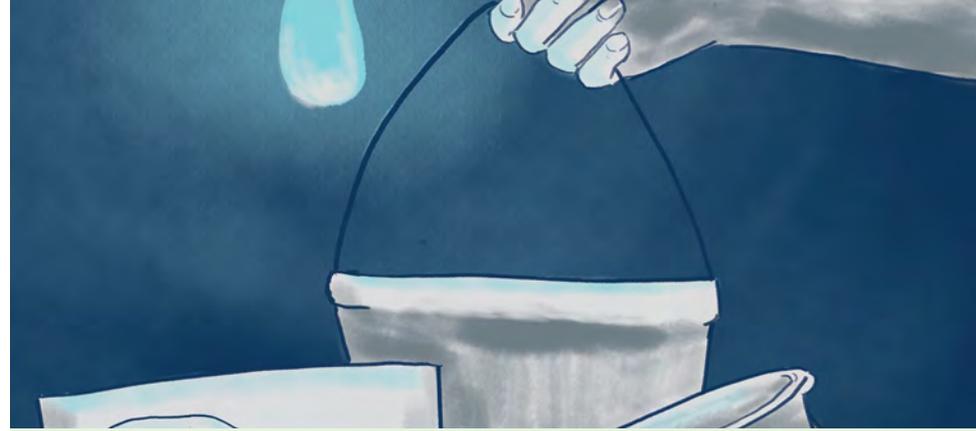
IN 2030 THIS COULD MEAN:

- + There could be wide-scale implementation of policies like carbon tariffs and tax cuts for green energy companies.
- + We may see increases in individual and corporate energy usage monitoring, time-of-use pricing, use of rolling blackouts, or social pressure to conserve energy.
- + Despite being regarded as a relatively cleaner energy source, natural gas might no longer be socially acceptable to use in commercial and residential development.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Population distributions may shift towards regions particularly suited to wind and solar energy generation, which could lead to new economic opportunities in rural and coastal areas.
- + Demand for batteries could soar, both for green energy storage and in electric vehicles (EVs).
- + Prospective employees may choose where to work based on a company's carbon footprint and adoption of green energy corporate policies (e.g., EV charging stations).
- + The availability of low-cost energy could stimulate significant development in tech, leading to growth in areas like quantum computing.
- + Climate science (and associated knowledge and skills) may become incorporated into fields such as underwriting and risk analysis.

Air + Water Contaminated



In 2010, the UN General Assembly passed a resolution recognizing that access to clean water is a basic human right. However, many Indigenous communities in Canada still don't have access to clean drinking water, including a First Nation in Northern Ontario that was evacuated in October 2020. In Japan, Fukushima's radioactive water may be pumped back into the ocean. In addition, air quality is being impacted due to frequent forest fires. New innovations are emerging to ensure access to clear air, such as MicroClimate's new Air helmet and BioVYZR's Venture Out & Breathe Easy product. And MIT researchers have built a machine to extract drinkable water from air. Even with recent innovations, California water futures started trading in December 2020, indicating worry about future scarcity. Contamination of basic resources, such as air and water, is creating uncertainty and risks for population health, attracting private interests and catalyzing innovation out of necessity.

However... some governments are signaling a commitment to policy changes that could counteract this trend. For example, as part of the Federal government's goal to achieve zero plastic waste by 2030, a ban on harmful single-use plastic items will be implemented.



IN 2030 THIS COULD MEAN:

- + Geopolitical landscape might be reimagined, and there may be increased risk of international conflict based on availability of clean air and water.
- + Eco-friendly organizations may attract the best talent.
- + There may be significant regional variation in how this may be experienced; for instance, Yukon may be in greater demand to access clean air and water and BC may continue to experience poor air quality from surrounding forest fires.
- + Increased investment in fresh water resources by large corporations may emerge if government policy is not adapted.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + The cleantech sector and innovation may grow out of necessity and due to a general increase in environmental conscience.
- + Canada might invest in sustainable agriculture, creating new opportunities for the agriculture sector and related jobs.



Reconciliation and Inclusion

Reconciliation and Inclusion



As 2020 has seen a wave of anti-Black racism protests all over the United States, many Canadians have highlighted the persistent anti-Indigenous and anti-Black racism that is also prevalent in Canada. For example, the 2015 the Truth and Reconciliation Commission of Canada (TRC) released 94 Calls to Action; however, as of 2019, only 9 have been enacted. But with a significant increase of diversity and inclusion–related job postings, a boom in support for Black-owned businesses, and growing demand for Indigenous authored content, it is possible that Canada is heading towards a more racially just and inclusive future.

RELATED TRENDS:

- + Road to Reconciliation
- + Land Back
- + Anti-Racism in the Workplace

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Indigenous knowledge and governance systems may become more dominant, requiring employers to make workplace cultural adjustments and invest in cultural competency training.
- + Should the Land Back movement continue to gain momentum, there may be new opportunities for Indigenous-owned businesses.
- + Power systems within organizations may shift to acknowledge institutional racism and colonial practices, addressing privilege and shifting leadership structures.
- + Conversely, there could be backlash to anti-racism movements, potentially resulting in a growth of overt white supremacy that drives ongoing inequality within the labour market.

Road to Reconciliation



First Nations, Indigenous, Métis, and Inuit have been impacted by a history of genocide, discrimination, and racism that extends into the present day. In 2005, the TRC identified 94 calls to action. While limited progress has been made towards these calls, there are signals pointing towards an increased emphasis on Indigenous rights and reconciliation, as well as a heightened appreciation of Indigenous arts, culture, and knowledge, including a wave of Indigenous stories and film gaining traction at events like TIFF. Significantly, the Mi'kmaq First Nations joint acquisition of Clearwater Seafoods for \$1 billion in November 2020 represents a groundbreaking opportunity for Indigenous communities that may motivate similar ventures and build towards the call for an annual \$100 billion dollar national Indigenous economy. A greater focus on the goals of reconciliation in Canada could give rise to Indigenous-inspired design, governance structures, and changes in our relationship with one another, land, and resources.

However... Indigenous communities are at increased risk during the pandemic, and only 9 of the 94 TRC calls to action have been implemented.



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IN 2030 THIS COULD MEAN:

- + There may be a shift in mainstream understanding of knowledge and evidence that prioritizes individual experience and the role of elders, wisdom, and storytelling.
- + Indigenous history might become a key component of the Canadian education system as well as a professional prerequisite.
- + Use of Indigenous governance systems and decision-making frameworks could become the norm.
- + There could be significant progress made on resolving the 94 calls to action.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be an increase in Indigenous-owned businesses and Indigenous labour and Indigenous, Métis, and Inuit in leadership positions.
- + Tapping into the potential of the Indigenous economy could increase overall economic prosperity in Canada.
- + There might be greater demand for settlers who appreciate and respect Indigenous ways of life and are skilled cross-cultural communicators.
- + There could be greater demand for Indigenous artists and musicians.
- + There might be a strong push for employers to decolonize the workplace and work cultures.

Land Back



As the Yellowhead Institute writes, one of the loudest and most frequent demands of Indigenous peoples in the relationship with settlers is for the return of stolen land. Large portions of the Maritimes, British Columbia, Ontario, and Quebec sit on unceded land—territory that was never signed away by the Indigenous peoples. There have been impactful recent land agreements made, including a historic land back deal for the Grey County and Saugeen Ojibway that was 25 years in the making, and a new historic Lands Act that Chief Doris Bill of the Kwanlin Dün First Nation says will greatly enhance its path to self-determination. The Land Back movement has also been incorporated by Indigenous artists and even inspired an entire exhibit in Victoria. One BC resident is voluntarily paying retroactive land rents to the Squamish, Tsleil-Waututh, Musqueam, and Te'mexw Nations for living on unceded land, and a Quebec developer offered to give the land that was at the heart of the Oka Crisis back to the Mohawks of Kanesatake. While this is still limited progress, this evidence could signal a movement towards reclamation that would fundamentally restructure ownership of land in Canada.

However...according to First Nations communities in Ontario, COVID-19 recovery has trampled Treaty rights through resource extraction and forestry.



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IN 2030 THIS COULD MEAN:

- + It may become common practice for non-Indigenous, non-Inuit, and non-Métis people in Canada to refer to themselves as settlers.
- + Settlers living on unceded land may pay rent to the original inhabitants of the territory.
- + If the Land Back movement continues to gain momentum, there could be violent pushback from settlers.
- + There could be greater action taken towards the climate crisis as land and resources are managed more sustainably.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be demand for new organizations and positions focused on settling land claims.
- + There might be a reduction of mining and other extraction-based industries that tend to operate on Indigenous lands—or a shift of these sectors towards more Indigenous ownership and benefit.
- + Regions with high amounts of unceded territory, such as BC, could be disproportionately impacted economically by Land Back movements.

Anti-Racism in the Workplace



Systemic racism—that is, racism embedded as normal practice within society or an organization—exists in Canada, including in the workplace. Recent movements including Black Lives Matter and Defund the Police have put the spotlight on race-based discrimination and led to anti-racism commitments across numerous sectors. Yelp, for example, is now labelling businesses that are accused of racist behaviour, and many organizations are hiring for Directors and Managers of Anti-Racism, including George Brown College and St Joseph’s Health Centre in Toronto. Meanwhile, the Federal government has committed \$15 million to fund 85 anti-racism projects that target economic barriers and online hate. This could impact recruitment and workplace policies, while more broadly shifting structures of privilege and power dynamics.

However... there has been significant backlash to anti-racist movements, with a rise in online racist hate groups across the country and back-tracking in anti-racist education.



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IN 2030 THIS COULD MEAN:

- + There could be more BIPOC individuals in leadership positions in top companies and organizations.
- + Top talent may seek inclusive places to live, potentially creating a polarized country of inclusive and non-inclusive regions.
- + There might be a greater drive for accommodations and mainstream inclusive design to be normalized.
- + White supremacy may become more vocalized and overt as backlash to anti-racism movements.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Regions that have a reputation for strong anti-racism policies and programs might be more successful at attracting valuable talent, gaining a significant economic advantage.
- + There may be demand for new positions that deal directly with anti-racism, equity, wellness, and conflict, and investment in training and learning.
- + Efforts to address barriers to starting and growing a business may lead to more BIPOC entrepreneurs and founders.
- + There could be increased demand for consultants and members of senior leadership teams responsible for diversity and inclusion.



Finding Meaning + Well-Being

Finding Meaning + Well-Being

Mental health challenges have been on a steady rise among Canadians in recent years, a trend that has been exacerbated by COVID-19. While there are many causes of poor mental health, a primary cause is related to work stress, and the growing imbalance between our professional and personal lives. To manage our mental well-being, many Canadians are focusing on “self-care,” physical activity, meditation, and other wellness rituals, while some are choosing to live more minimally and work less.

RELATED TRENDS:

- + Back to Nature
- + Crisis Breeds Creativity
- + Workaholic Extinction
- + Fear of Pathogens... + People
- + Vaccine Identity
- + Another Pandemic

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + An increase in demand for nature-based services and experiences as Canadians embrace outdoor activities as a way to manage stress.
- + More Canadians may engage in creative outlets, increasing mental well-being while boosting creative problem-solving skills.
- + Some Canadians may reprioritize their lifestyles to enable working less, creating supply challenges for professions that are associated with working long hours.
- + Others may continue to experience ongoing anxiety related to COVID-19 and a fear of pathogens, restricting the types of employment opportunities they are willing to partake in, while a person's vaccine status may restrict permissible activities.
- + Should another pandemic occur in the next 10 years, there could be mass business closures and an increase in industries related to pandemic response.

Back to Nature



The combination of remote working, physical distancing requirements, and less distractions has led to a newfound appreciation for nature among many in Canada. This has resulted in increased demand for recreational, professional, and educational outdoor activity across the country, with people seeking to incorporate more intentional nature time into their lives and routines. Canada Goose has implemented an hour of paid outdoor time per week for all its employees via a HumanNature pass, and BC Parks is providing up to 10,000 healthcare workers with free guided "forest bathing" sessions. Meanwhile, cottage prices have soared by 12% with increased demand. In the coming decade, this shift could significantly affect the location of our work and living spaces, and enhance environmental appreciation and protection.

However... people are also engaging more with immersive digital leisure.

IN 2030 THIS COULD MEAN:

- + There is the potential for an exacerbation of inequity and disparity as access to nature is increasingly a privilege.
- + People may be healthier physically and mentally, which could reduce strain on the healthcare system.
- + Outdoor classrooms and outdoor learning for adults might become more popular.
- + Roads designed for biking and walking—not driving—could become the norm.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be more jobs related to maintaining and monitoring public parks.
- + Outdoor recreation equipment (bikes, skis, etc.) may see continued demand increases.
- + Intra-Canada nature tourism may experience a boom, leading to an economic boost for rural towns near natural attractions (provincial and national parks, etc.).
- + People may grow more food at home, possibly reducing demand for store-bought items from grocery stores.

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Crisis Breeds Creativity



The forced constraints under COVID-19 are stimulating artist and entrepreneur creativity. San Francisco–area artists continue to create during the pandemic, and the Untitled festival was held in September 2020 to kick-off a decade of imagination, art, and creativity. Pandemic lockdowns have also motivated individuals to explore creative hobbies, and permanent remote work may also be stimulating creativity by providing the right conditions to enable workers to be more creative, including reduced interruptions. This period of health and economic crisis may stimulate even greater individual and societal imagination and creativity, well beyond the arts and culture community.

However... there is a worry about survival of artists, arts organizations, and creative businesses given how COVID-19 has forced in-person public performances and cultural experiences to be cancelled.



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IN 2030 THIS COULD MEAN:

- + There may be a general increase in the time Canadians spend on creative hobbies, but creative industries, artists, and creative businesses may struggle financially.
- + Workers may seek out companies that make time for them to be creative.
- + Fine arts education and training may see an increase in enrollment.
- + DIY culture such as cooking, repairs, paintings, and haircuts may increase.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There could be an increased demand for labour in digital creative industries, such as video gaming and development of VR environments for work, play, and learning.
- + Large corporations may monopolize creativity and innovation by investing in time for creativity and researching the right conditions to support creativity (e.g., collaboration and/or time and space for deep thinking).
- + The Canadian economy may not be able to support arts and culture activities, and this may result in the longer-term decline of this sector and reduce the desire for this career path moving forward.

Workaholic Extinction



Based on an Angus Reid survey, 53% of Canadians said that a four-day work week would be a good idea. In addition, according to BetterUp's Meaning and Purpose at Work report, 9 out of 10 people are willing to earn less money to do more meaningful work. In the wake of COVID-19, individuals are re-evaluating personal and economic priorities to focus on family, friends, and hobbies. New concepts are emerging, such as regular sabbatical years (after every three years) to enjoy life rather than waiting for retirement. Many people are also questioning their values and long-held assumptions, and may rethink their career paths. The value placed on professional aspirations and our relationship to work is shifting, and individuals may be happier with less hours of work, less income, and new work norms.

However... small business owners across the country are fighting to stay afloat with COVID-19 restrictions in place, and there are many Canadians who have either temporarily or permanently lost their jobs due to the inability to work from home, or the general decline in business and economic conditions.

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IN 2030 THIS COULD MEAN:

- + The shift in values that may emerge might lead to new kinds of work, a three-day work week, more part-time positions, gig work, freelancing, and portfolio careers.
- + This trend may reinforce a rural boom, with migration patterns driven by life preferences rather than location of work.
- + There may be reduced emissions and improvements in the climate crisis due to a reduction in commuting.
- + It may become more common to have larger families, since parents have more time and energy available.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be growth in the wellness and self-care sector as individuals prioritize happiness.
- + Recruitment may be dictated by worker-driven career and life transitions.
- + New productivity measures may become mainstream with a shift from number of hours worked to outputs produced.
- + The retail and hospitality industries may decline as individuals consume less overall.
- + An increase in family time may lead to many positive societal outcomes, including higher graduation rates, which could mean a more educated workforce and more skilled labour.

Fear of Pathogens... + People



The rampant contagion of the COVID-19 virus has led to the enforcement of strict physical distancing requirements in Canada and around the world, in some cases extending to full lockdown. This has led to severe impacts on people's mental health, with psychotherapists in the UK reporting a 200% increase in individuals displaying agoraphobic tendencies, for example. In fact, a report from ADT states that fear of other people is the most-searched phobia of 2020. The instinctual association between the virus and being in close proximity to other people could lead to longer-term psychological impacts, including aversions to large crowds and public spaces along with increased social isolation and loneliness.

However... a rugby game in Australia was played in front of a sold-out crowd, signalling persistent demand for high-density events even in the wake of COVID-19.



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IN 2030 THIS COULD MEAN:

- + People might spend more time with family and friends and less time at work.
- + A decreased need for shared spaces could lead to changes in building codes and urban design.
- + There could be less sicknesses overall due to increased awareness and precautions regarding the spread of viruses.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There could be increased demand for cleaning services and infection control practices.
- + There may be larger demand for mental health services and professionals.
- + Decreased interactions between workers (even if back in offices) could necessitate innovations in work culture to facilitate knowledge transfer, collaboration and innovation.

Vaccine Identity



On December 8, 2020, the UK became the first country to administer a COVID-19 vaccination, and the following day Health Canada announced that vaccinations for high-priority Canadians would commence that same month. While a vaccine is good news for many, a November poll found that 25% of Canadians are strongly against the use of a vaccine. This is in direct conflict with the 60% of Canadians who are in favour of making the COVID-19 vaccination mandatory, an idea that has been dismissed by some political leaders. While it may not be mandatory, government officials have suggested that restrictions (notably travel) will be placed on those who do not receive the vaccination, and experts suggest that there are circumstances where employees may be fired for failing to receive the vaccine. As such, it is possible that the vaccination status of employees may become an increasingly important form of identification in the future, and may impact access to education, employment, leisure activities, travel, and more.



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IN 2030 THIS COULD MEAN:

- + A potential increase in social tension between those who are vaccinated and those who are against vaccination.
- + Vaccination data might be more public than in the past, and used by unexpected parties such as insurance brokers and financial planners.
- + Some people may advocate for the right to not be vaccinated as a protected ground in the charter of rights, or the right to keep their vaccination status private.
- + It may become common practice for employers to conduct 24/7 health and wellness surveillance of employees (including temperature, stress, physical activity, etc.), driving new demand for data privacy policies.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + If the COVID-19 vaccine is successful, there may be an increased interest for pharmaceutical jobs and scientific research related to vaccines among Canadians.
- + Employment may be stronger in regions with high vaccination rates.
- + Employment laws may need to change to clarify employee vaccination rights.

Another Pandemic



The current devastation caused by the ongoing COVID-19 crisis, including over 1.2 million deaths worldwide, has demonstrated how unprepared many countries are for a future pandemic. Recent scientific literature suggests an increase in the intensity and frequency of future pandemics due to increases in the human impacts of deforestation, climate change, and industrial agriculture. There are also ominous warnings from scientists regarding the threat of antimicrobial resistance, and a recent study from the University of North Carolina says that a strain of coronavirus that has devastated the pork industry has the potential to infect humans as well. The implications of another pandemic within the next decade—compounding the effects of the current health and economic crisis—would be severe and far reaching.

However... in Canada, the increase in public health R&D investments and rising societal trust in doctors and science may mitigate the impacts of future pandemic risk.



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IN 2030 THIS COULD MEAN:

- + More people may choose to live in alternative housing and family structures if we are forced to spend more time at home.
- + Substance abuse may increase as a consequence of the stress and anxiety caused by another pandemic.
- + There could be permanent systems and designs in place to support social distancing.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be growth in the field of pandemic response administration and demand for more emergency preparedness positions in companies.
- + It may become a struggle to attract talent to the hospitality, retail, and restaurant industries, possibly necessitating government incentives to participate in them.
- + There could be mass small business closures if owners see no hope for the future.



Shifting Power

Shifting Power



For millennia, our world has seen various political powers rise and fall as global empires fight for control. From China, to Russia, to the United States, to big business and market consolidation, global power struggles continue to drive economic policy and political decisions. While the United States has been the dominant superpower in recent years, this power has been observed as moving to China. COVID-19 has created new international and domestic tensions, while impacting broader dynamics such as globalization and international trade policy. Meanwhile, a rise in youth protests internationally suggest a demographic power shift may also be in the works.

RELATED TRENDS:

- + Bigger Business, Richer Execs
- + World War
- + America vs. America
- + Deglobalization
- + Gen Z Takeover
- + Canada Breakup

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Market consolidation may limit growth of small and medium-sized businesses while impacting competition and innovation and potentially worsening wage polarization.
- + New forms of cybersecurity threats and intensified international tensions could result in global conflict, significantly impacting the global economy.
- + Ongoing political and economic instability in the United States and subsequent social unrest may create more supply of international talent for Canada, and an increase in demand for some Canadian exports.
- + Conversely, Canada may embrace protectionist policies and “deglobalize,” promoting “buy local” and investing in localized supply chains.
- + Within Canada, regional government influence may become more powerful, impacting interregional economic development and the domestic migration of workers.
- + An increase in Generation Z entering the labour force could create new generational pressures for employers, given differing values and viewpoints.

Bigger Business, Richer Execs



Small businesses (and their owners) have taken the biggest hit during the pandemic, with one in seven at risk of closing, and operations at less than 30% of normal sales. In comparison, many large firms (in particular big box stores) and their executives have thrived—often at the expense of smaller establishments. This trend may signal further market consolidation and wealth concentration over the course of the coming decade. As small businesses employ 70% of Canada's total private labour force, this shift could radically alter Canada's labour market landscape.

However... executives like Air Canada's CEO have had compensation cuts due to the pandemic.



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IN 2030 THIS COULD MEAN:

- + There could be increased homogenization and standardization of products, services, and built environments.
- + There may be higher levels of environmental degradation (and less Canadian supply chains) due to larger, more international supply chains from multinational corporations.
- + Companies like Shopify could grow even larger, putting Canada on the innovation map globally.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + An increase in market consolidation might lead to a weakening of worker bargaining power, which could impact minimum employment standards including compensation, benefits, and sick leave, as well as lead to less diversity in hiring practices.
- + There may be a bifurcation of wages into high-paid and low-paid work.
- + Given the more specialized roles that tend to exist in highly organized corporate structures, there could be more demand for specialized labour.
- + A decline in small businesses may lead to a reduction in entrepreneurship and reduced startup ecosystem and creativity levels.

World War



Geopolitical uncertainty and conflict are accelerating and taking new forms, including cyber warfare, trade wars, and AI-based military interventions. 71% of Chief Information Security Officers believe cyber warfare is a threat to their organization, and over the last year at least 67 US government bodies have suffered ransomware attacks. In addition, military AI is being deployed and is demonstrating that an algorithm can outperform humans. The concerns about global conflict have reached the mainstream, where early in 2020 TikTok was flush with WW3 memes. Even though Canada may not be a dominant actor in the potential conflict, because of globalization and the nature of cyber attacks the country is still potentially at risk. Over time, this may result in a growth in the cybersecurity industry in Canada, including increased demand for privacy, security, and dark web skills.

However... Prime Minister Justin Trudeau and the European Union's two top political leaders met in advance of the US election to push for a more peaceful and stable global context.



IN 2030 THIS COULD MEAN:

- + There may be an emergence of gated “offline” communities to enable safety and protection.
- + The best tech talent and hackers in Canada might be drafted into national cyber defence.
- + New trade agreements and new global alliances may emerge (with the potential collapse of USMCA and WTO).
- + Investment in domestic supply chains may occur to produce more goods and services in Canada.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + If Canada is less impacted by global conflict, Canada might attract highly skilled talent and there may be increased immigration to the country.
- + There may be growth in defence, security, cybersecurity, and individual cybersecurity investments, or cybersecurity guards may emerge to protect digital identities and assets.



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America vs. America



Since confederation, American Democrats and Republicans have often found themselves on opposite sides of the spectrum on a range of social, economic, and political issues. This differing of perspectives once led the country to be at war with itself. Given that leading up to the 2020 election Trump had refused to commit to a peaceful transition of power, thousands of Americans were engaged in months-long protes over the police murder of George Floyd, and Americans had purchased a record number of guns, many companies were taking precautions for post-election civil unrest. For example, Walmart removed gun and ammunition from store shelves. In recent years, polarization has become a defining characteristic of the United States, illustrated by high election voter turnout in 2020 still resulting in a close race. While President Trump was an especially polarizing leader, it is unclear whether the President-elect Biden will ease the growing discontent across America.

However... while social media platforms have recently played a significant role in disseminating polarizing information, Twitter has recently introduced new features to label or remove misinformation.



IN 2030 THIS COULD MEAN:

- + There may be ongoing and increased social tensions and unrest in the United States.
- + The rise of the “Canadian dream” could emerge as immigrants see more potential in Canada than the United States.
- + Ongoing border closures between Canada and the United States could occur.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There could be increased conflict between Canada and the United States, including over pipelines and natural resources and trade, and potentially more tariffs.
- + Persistent political volatility in the United States could lead to outsourcing of key economic segments to Canada and a “brain gain” for Canada, as top innovators and entrepreneurs opt to live in Canada given greater political stability in comparison to the United States.



WEAK

EMERGING

MATURE

Deglobalization



While technology and transportation have made international transfers of goods, services, investments, knowledge, and people pervasive, recent evidence suggests a shift away from unfettered globalization, particularly in trade. The pandemic has exposed the over-reliance on fragile global networks and forced regions to strengthen local supply chains, particularly in essential goods like food and medicine, and buy local campaigns have gained momentum across Canada. Along with a rise in global protectionism, the pandemic has significantly reduced international travel, which may have longer-term impacts.

However... some economists argue that Coronavirus-induced "reshoring" is not happening, while others peg deglobalization as "fake news."

IN 2030 THIS COULD MEAN:

- + We might increasingly shift to eating seasonally and buying local, with less imported food in grocery stores.
- + There could be boycotts on international goods.
- + There might be more investment in innovative approaches for Canada to localize its supply chains.
- + The cost of doing business could go up if the traditional efficiencies of globalization are eroded.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be new demand for manufacturing jobs in Canada (especially in non-urban areas) that were previously offshored.
- + There could be a shift towards greater economic reliance on secondary and tertiary industries and less export of raw materials.
- + The local tourism industries in Canada might see a boom.



Gen Z Takeover



Generation Z—people born between 1996 and 2010—is entering the workforce, and by 2030 will account for 30% of the global labour market. In Canada, Gen Z currently makes up about 25% of Canada's population, and accounts for \$50 billion in buying power. Gen Zers are digitally native and tech savvy, diverse, politically engaged, and socially conscious. The increasing influence of today's youth, particularly through activism (both via public protests and social media), might push companies to adopt more explicitly social mandates, while pushing governments to reform the status quo.

However... many criticize the performative nature of Gen Z activism, particularly on social media, while others question whether this generation is unique in its activism and idealism.

IN 2030 THIS COULD MEAN:

- + There may be more communal living in alternative family arrangements such as co-parenting or co-living models.
- + Recruitment strategies may increasingly go beyond just compensation to include aspects like ethical policies and wellness benefits.
- + There may be a rethinking of some of our most deep-rooted structures and institutions, such as democracy, capitalism, policing, full-time work, land ownership, and post-secondary education.
- + Older, less digitally savvy workers may be pressured to retrain or find new roles.

POTENTIAL LABOUR MARKET IMPLICATIONS:

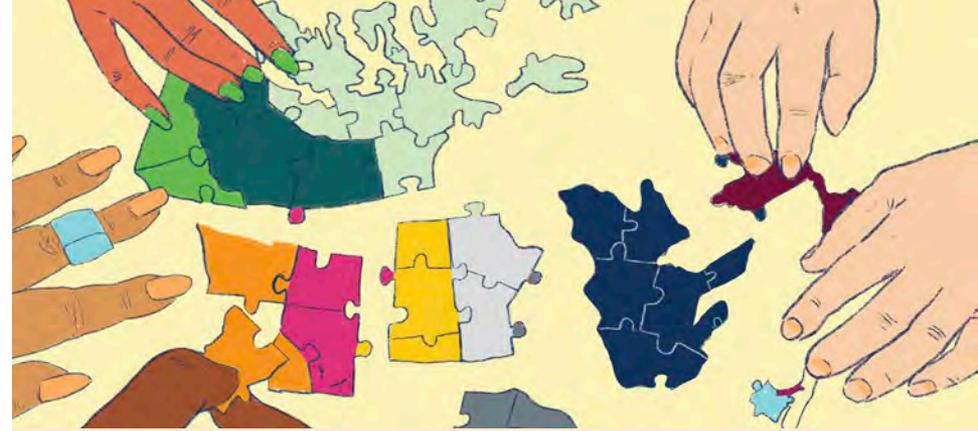
- + There may be consumer demand for all companies to become socially responsible enterprises that fully consider value to communities, workers, environment, and supply chain alongside shareholders.
- + The supply of contract or gig workers may increase if benefit structures and protections for non-traditional labour become more robust.

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Canada Breakup



Canada has a long history of provincial and regional independence initiatives. While Quebec has traditionally been at the forefront of separatist politics, and Indigenous communities have long been vying for sovereignty, the Alberta-based Wexit movement has recently been gaining momentum since the 2019 federal election. The provincial and territorial nature of the COVID-19 pandemic has added another layer to regionalization, with inter-regional travel restrictions, reduced cross-Canada transportation, regional bubbles, and more broadly a questioning of the federalist system as provinces and territories respond inconsistently and disjointly. If these regionalist sentiments continue to rise, there could be significant impacts on Canada's future workforce, especially regarding the movement and distribution of labour across the country.

However... research from the University of Alberta suggests support for Wexit may be waning.

IN 2030 THIS COULD MEAN:

- + People in Canada could self-identify more strongly with their respective provinces, territories, and regions than with the country as a whole.
- + Provincial governments could become relatively more powerful when compared to the Federal government.
- + Economic disparities between regions in Canada may become more severe.
- + Certain regions of Canada could become fully independent states.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Movement of labour between provinces could be significantly reduced.
- + The inter-regional transportation and tourism industry (airline and train in particular) could see reduced demand, while intra-regional tourism may experience growth.
- + There might be a restructuring of supply chains within Canada.



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Evolving Population

Evolving Population



Canada's population is getting older. There are now more seniors than children, and Canadian families are steadily having less children. New studies show that Baby Boomers would prefer to keep working than retire, which has the potential to put demographic pressure on Canada's labour market. While Canada's population growth is the highest among G7 countries, this is largely due to immigration, which has been significantly reduced due to COVID-19. However, to make up for reduced immigration during COVID-19, Canada has increased its immigration targets, although these may be challenged should the pandemic continue or anti-immigrant sentiments increase.

RELATED TRENDS:

- + Working Retirement
- + Free Childcare
- + Birth Strikers
- + Digital Residents

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + As Canada's population ages, so will its labour pool, requiring new approaches to reskilling and expanded employee accommodations as Canadians work beyond the typical retirement age.
- + Should new policies such as free childcare be introduced to incentivize young families and support gender equality, Canada's birth rate may increase.
- + Conversely, Canada's birth rate could decline further due to climate change concerns and global uncertainty among young families.
- + Digital populations may increase globally should there be a wider adoption of digital residency programs that welcome global entrepreneurs to conduct business digitally.

Working Retirement



There are a record of 10,000 centenarians in Canada—10,795 people older than 100. By 2030, it is projected that one in four Canadians will be seniors. At the same time, many people in this demographic are not prepared for retirement. According to a McKinsey Global Institute report, 41% per cent of individuals in advanced economies did not save for retirement. This population is also seeking loans to cover their costs, with new mortgages rising by 63% among Canadians aged 73–93. At the same time, many Gen Z-ers and millennials are unlikely to save for retirement given the impending climate collapse. According to a forecast in Benefits Canada, defined benefit pensions in the private sector will eventually die. There is a shift underway that may mean people work well into their 80s and 90s to support their financial needs. In the near term, this may be true for existing seniors who haven't prepared to financially retire. In the longer term, this may also mean an overall change in the approach to work, where individuals focus on well-being and meaning throughout their long careers.

However... according to Statistics Canada, in 2019, the average retirement age in Canada was 64.3 years.

IN 2030 THIS COULD MEAN:

- + The increased flexibility of work and opportunities for gig work, as well as lack of savings, may mean that workers choose not to retire for a long period of time.
- + Talent retention may become more difficult in a longer working life.
- + There might be a need for more accessible working facilities to accommodate older employees.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be increased demand for publicly funded healthcare services to support an aging working population.
- + There may be increased demand for reskilling opportunities as workers retire from one career and move on to another career.
- + Employers may need to accommodate workers spanning multiple generations and tailor incentives and compensation accordingly.



Free Childcare



A 2019 Canadian Centre for Policy Alternatives study found that the average cost of preschool-age child care was \$1,207 per month in Toronto, \$954 in Vancouver, \$861 in Halifax, and \$179 in Quebec City. Some women report that paying for childcare feels like paying to get to work. Recently, the British Columbia Green Party proposed free childcare for children under age three and free early-childhood education for children under age four, while in 2018, the Ontario Liberal Party proposed free childcare for children aged two to four. As Canada grapples with the long-term impacts of Covid-19 on women's employment participation, and declining birth rates, free childcare might become a popular solution. In fact, in April 2020, Australia made childcare free for families for three months in efforts to reduce financial stress created by Covid-19, and in the September 2020 Throne Speech, Prime Minister Trudeau promised a national childcare and early education system.

However... concerns over government spending are already high, and free childcare would be a new multi-billion-dollar annual expense.

IN 2030 THIS COULD MEAN:

- + There may be an increase in economic mobility for lower-income families.
- + Gender parity may improve, with an increase of women in leadership positions.
- + There could be an overall increase in household incomes, and an increase in disposable income for families with young children.
- + There might be a decline in the duration of parental leaves taken by new parents.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + A national childcare program could mean a significant increase in demand for workers in childcare, early childhood education, daycare administration, and daycare certification.
- + Should adoption be variable across Canada, regional competitiveness may increase for areas that do implement.

WEAK

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MATURE

Birth Strikers



In 2018, Blythe Pepino founded the climate change activism group, BirthStrike, and has built a group of 450 followers, who pledge to not to have children because of fears related to climate change—droughts, famine, flooding and extreme heat. Teenagers in Canada are following suit and have signed up for the Climate Strike Canada’s “No Future, No Children” campaign. At the same time, there is a global decline in birth rates, where 23 countries are expected to see their populations halve by 2100. Japan is responding to this trend by funding AI-based matchmaking services in order to boost the falling birth rate in the country. In Canada, the fertility rate has been decreasing over time. Statistics Canada announced that in 2019, the total fertility rate in Canada hit a record low of 1.47 births per woman. People choosing not to have children have the potential to significantly change the population in Canada over time.

However... the Century Initiative is focused on responsibly growing the population of Canada, through immigration, to 100 million by 2100.

IN 2030 THIS COULD MEAN:

- + There may be increased societal pressure for couples to be childless.
- + Family structures, relationships, and marriage rates may evolve.
- + New policies may emerge to encourage families to have multiple children.
- + An aging population could have many impacts, including more government spending on healthcare and pensions.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + Greater women’s participation in the workforce may completely abolish the current negative impacts for women’s careers and career progression.
- + There may be a push to attract international students and younger workers to Canada.

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Digital Residents



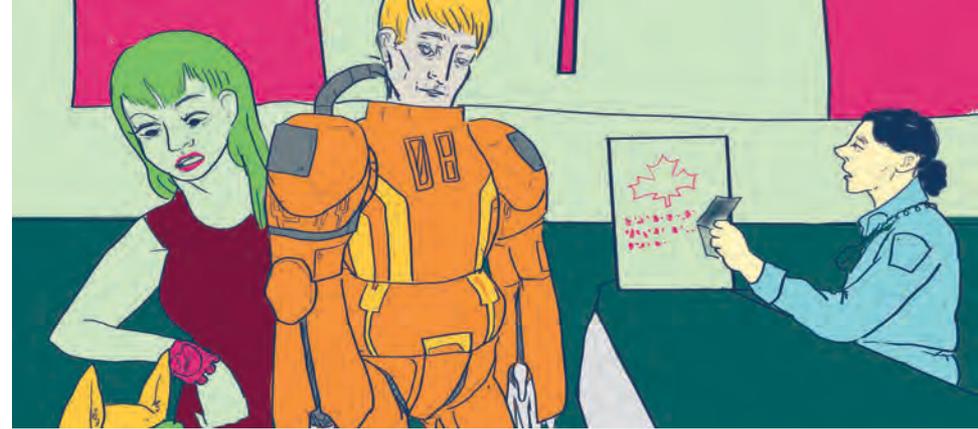
In December 2014, Estonia launched a digital residency program designed to attract global entrepreneurs to use their government e-services. With over 50,000 e-residents from 157 countries, Estonia has allowed 6,000 businesses to incorporate, and have a European bank account, conduct business in the European Union, yet be located anywhere in the world. The Estonian e-residency is a popular option for Brits escaping Brexit and Americans escaping Trump. Understanding the economic benefit, Azerbaijan has followed suit, and Lithuania plans to launch a similar program in January 2021. With the acceleration of remote work, it is possible that borderless work may become more common in the future.

However... deglobalization and a push to support local businesses may prevent more countries from adopting this type of program.

WEAK

EMERGING

MATURE



IN 2030 THIS COULD MEAN:

- + Everyone may have digital IDs that are used across platforms and services.
- + The concept of citizenship may evolve and no longer be tied to geographic place.
- + Intercultural, diversity, and inclusion training may be mandatory for all workers as it becomes common to be working on multinational teams.
- + The United Nations' International Labour Organization may become more important to support global workers' rights.
- + There may be a growth of international accreditation and globally recognized certificate programs to reduce cross-border credentialization challenges.
- + There may be increased employer surveillance technology to monitor global teams.

POTENTIAL LABOUR MARKET IMPLICATIONS:

- + There may be significant growth in the digital economy, while analog businesses may become less competitive.
- + Canadian employee wages may be compressed if competing with global talent, potentially resulting in a call for a global minimum wage.
- + Income tax policies may need to be updated to reflect shifts in global employment trends.

5

Conclusion

Conclusion

In today's COVID-19 context, strange changes seem to emerge and evolve every day, making it particularly challenging to plan for the next decade of employment. Understanding the importance of identifying and exploring these broad changes, *Yesterday's Gone* outlines 8 megatrends and 34 related meso trends that have the potential to impact the future of Canada's labour market. The intent of this research is to inform the design of future-oriented skill demand programs and future-focused policy responses.

Many of the trends outlined in this report have been accelerated and intensified by the COVID-19 pandemic, while others have emerged as a direct result of it. These trends range in maturity, and while some may seem temporary, or relatively weak signals, it is important to consider how these changes may impact the future of Canada's labour market. It is also important to keep in mind how these trends may affect population and demographic groups differently, as the impact may not be equal.

Yesterday's Gone is not meant to be a comprehensive study of any one trend or a prediction of what the future holds for Canada's labour market. It seeks to spark exploratory thinking about what might lie ahead—to push readers to consider “what if”—with the goal of preparing leaders for the uncertain future of Canada's economy.

Next Steps

- + This research will be used in addition to the FCOG and other sources of labour market data to frame a set of regional workshops exploring solutions to Canada's current skill shortages as part of the Employment in 2030: Action Labs initiative. This work is currently underway and will finish mid 2021.
- + While created for the Employment in 2030: Action Labs initiative, this report contains information relevant to a much broader audience. Making sense of the range of changes at play in our current uncertain context is a challenging task facing all Canadians, especially policy makers. BII+E looks forward to continuing to provide new sources of information such as this report to support future-focused policy decisions.
- + While it is impossible to predict what the future may hold for Canada's labour market, these trends are intended to provoke action and thought about what might be possible. We look forward to continuing to build on this work in the years ahead as employment trends continue to change and evolve.

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We hosted a National Expert Panel to strengthen our understanding of mature and emerging trends that could impact the future of Canada's labour market and to discuss the implications of these trends going forward. Thank you to our expert panel members who contributed their subject matter expertise by responding to a survey and/or participating in discussions.

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