



CANADIAN'S SHIFTING OUTLOOK on EMPLOYMENT

2020 Survey on Employment and Skills

Preliminary Report

MAY 2020

THE FUTURE SKILLS CENTRE

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

The Future Skills Centre is a partnership between: Ryerson University, The Conference Board of Canada, Blueprint ADE

The Future Skills Centre is funded by the Government of Canada's Future Skills Program.



THE DIVERSITY INSTITUTE

The Diversity Institute conducts and coordinates multidisciplinary, multi-stakeholder research to address the needs of diverse Canadians, the changing nature of skills and competencies, and the policies, processes and tools that advance economic inclusion and success. Our action oriented, evidence-based approach is advancing knowledge of the complex barriers faced by underrepresented groups, leading practices to effect change, and producing concrete results. The Diversity Institute is a research lead for the Future Skills Centre.



This study was conducted by the Environics Institute for Survey Research:

ENVIRONICS INSTITUTE FOR SURVEY RESEARCH

Environics Institute for Survey Research conducts relevant and original public opinion and social research related to issues of public policy and social change. It is through such research that organizations and individuals can better understand Canada today, how it has been changing, and where it may be heading.



The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of any of the project partners or of the Government of Canada.



Contents

- Executive Summary 1
- A. Introduction 3
- B. The initial outlook on employment 5
- C. The shift in outlook on employment 7
- D. Support and resilience 12
- E. Thinking ahead 15
- F. Conclusion 17

Executive summary

The 2020 Survey on Employment and Skills was designed to explore the experiences and attitudes of Canadians relating to education, skills training and employment. The survey, however, was conducted during the period in which the impact of the COVID-19 pandemic on Canada became apparent. It therefore offers an early opportunity to explore how Canadians' outlook initially shifted as the pandemic took hold.

The survey confirms that the pandemic caused a significant shift in Canadians' outlook on employment. Between late February and early April, there was an increase in most parts of the country in the proportions saying that it was a bad time to find a job where they live, and who were worried about themselves or a member of their immediate family finding or keeping a stable, full-time job. The only province that did not record any significant change was Alberta, where the level of pessimism was already very high before the pandemic was declared.

The survey also shows, however, that even before the pandemic's impact began to be felt, many Canadians were concerned about job security, and had direct or indirect experiences with unemployment. Absent other changes, the restarting of the economy after the current crisis has passed will only bring the country back to a situation in which one in two of those in the labour force are worried about job security for themselves or members of their family.

Despite the change in employment outlook, the survey finds that Canadians did not lose confidence in themselves or in the social safety net as the pandemic took hold. Before and after the pandemic

arrived, Canadians remained equally likely to have a hopeful view of the future and feel they can bounce back quickly after hard times. They also remained equally likely to believe that they would receive support from government in the event that they lost their jobs. At the same time, this confidence is not equally shared by all Canadians: those with more stable employment, higher levels of education and higher incomes were more likely than others to express these feelings of resilience and support. Less secure workers are thus facing the pandemic's impact with a weaker sense that they can access the material and non-material resources they might need to weather the storm.

Finally, the survey offers some initial insights into how governments and employers can prepare for the restarting of the economy once the immediate emergency has passed. On the one hand, Canadian workers are predisposed to be open to new work arrangements that are more reliant than ever on technologically-assisted communication and collaboration. They also appear to recognize the importance of the types of skills, such as those related to communication and collaboration, that may be increasingly in demand as work resumes. On the other hand, to date, many workers have been missing out on the type of skills training or upgrading that they might need in order to transition to new work arrangements; no more than half of the labour force has had any employer-delivered skills training over the past five years. The need for such training may now be greater than ever; while, at the same time, employers' ability to finance and deliver it, given the economic shutdown, may never have been more challenged.

Key findings:

- Despite the low overall level of unemployment at the start of this year (before the onset of the COVID-19 pandemic in Canada), many Canadians were already expressing concerns about job security, either for themselves or members of their family.
- There was a widespread jump in pessimism about employment prospects over the month of March.
- Despite this change in employment outlook, Canadians did not lose confidence in themselves or in the social safety net as the pandemic took hold.
- Nonetheless, less secure workers are facing the pandemic's impact with a weaker sense of resilience and confidence in the social safety net.
- Overall, Canadian workers seem comfortable with the ways in which technology has been impacting the world of work. They also appear to recognize the importance of the types of skills that may be increasingly in demand as work resumes, such as those relating to communication and collaboration.
- Workers who access skills training are generally positive about the experience and its outcomes. But over the past five years, no more than half of the labour force has had any employer-delivered skills training. Older workers, non-unionized workers and those with low-income jobs are less likely than others to have participated in this type of training.

A. Introduction

The start of 2020 saw Canada experiencing one of the most positive employment situations in decades. The national unemployment rate had fallen to 5.7 percent; among those in their core working years (between the ages of 25-54), it had fallen to below five percent.¹ But the situation was dramatically upended in March, with the onset of the COVID-19 pandemic. By the end of that month, workplaces had been closed, and millions of Canadians had either lost their jobs or had their hours of work significantly reduced.²

There is no parallel in modern Canadian history for such a sudden reversal of fortune.

The early impact of the crisis on the outlook of Canadians was captured, at least in part, by the 2020 Survey on Employment and Skills. The survey, conducted by the Environics Institute for Survey Research in partnership with the Future Skills Centre and the Diversity Institute at Ryerson University, was designed and launched prior to the onset of the pandemic in Canada, and was not originally intended to measure its effect. Its purpose, rather, was to explore the experiences and attitudes of Canadians relating to education, skills training and employment.

The survey of 5,000 Canadian adults, however, was conducted between February 28 and April 4 – precisely the period during which the extent and devastating implications of the

pandemic for this country became apparent. During the time that the survey interviews were conducted, workplaces, schools and public venues were closed, and all but those providing essential services were asked to stay at home – all in an effort to stop the spread of the virus. Unintentionally, then, the survey offers an opportunity to explore how Canadian attitudes shifted between early March – when things in Canada appeared normal – and late March, by which time every aspect of daily life had changed.

No less importantly, many of the survey results have taken on added relevance in the context of the dramatically changed economy. Although originally designed to support efforts to improve employment outcomes, the survey can now be used to inform early reflections as to what is needed for a successful reopening of the economy and return to work for millions of Canadians.

Accordingly, this initial report from the 2020 Survey on Employment and Skills has two objectives. First, it examines how Canadians' outlook on employment and the economy shifted over the course of the month of March. Secondly, it provides some initial insights into how governments and employers should respond to the job disruptions caused by the pandemic; and how they might prepare for the restarting of the economy once the main restrictions on personal movement and interaction are lifted.

¹ Statistics Canada, Table 14-10-0327-01: *Labour force characteristics by sex and detailed age group, annual*.

² Statistics Canada reports that the number of employed declined by more than one million in the month of March, while more than two million other Canadians remained employed, but worked no hours or fewer than half their usual hours. See *The Daily* (April 9, 2020) at <https://www150.statcan.gc.ca/n1/daily-quotidien/200409/dq200409a-eng.htm>.

The 2020 Survey on Employment and Skills

The 2020 Survey on Employment and Skills was conducted by the Environics Institute for Survey Research, in partnership with the Future Skills Centre and the Diversity Institute at Ryerson University. The survey explores the experiences of Canadians relating to education, skills and employment, including perceptions of job security, the impact of technological change, and the value of different forms of training. A total of 5,000 respondents, 18 years and older, in all jurisdictions across Canada were interviewed using both online (provinces) and telephone (territories) methodologies between February 28 and April 4, 2020. Approximately 2,900 interviews were conducted on March 9 or earlier – prior to the WHO pandemic declaration – and approximately 2,100 were conducted on March 11 or afterwards. Results are weighted by age, gender, region and education to ensure that they are representative of the Canadian population.

This initial report on results relating to employment will be followed by a comprehensive report later in 2020.

B. The initial outlook on employment

Despite the low overall level of unemployment at the start of this year (before the onset of the COVID-19 pandemic in Canada), many Canadians expressed concerns about job security, either for themselves or members of their family.

Among those surveyed between February 28 and March 9³ and who were in the labour force, eight percent reported that they were unemployed and looking for work.⁴ But almost one in two said they were either very or somewhat worried about themselves or a member of their immediate family finding or keeping a stable, full-time job. This included 46 percent of those working full-time, 53 percent of those working part-time, and 53 percent of those who were self-employed. While the figure was higher among those employed on a temporary, casual or seasonal basis (55%), almost half of those with permanent jobs (46%) also said they were worried.

Similarly, in the same period, 40 percent of those in the labour force said that it was a bad time to find a job in the city or area where they live.

Part of the reason for concern about job security may be that many of those currently employed have recently experienced a job transition. Almost one in four (22%) of those employed at the time of the first period of the survey (between February 28 and March 9) reported that, in the last 12 months, they had personally experienced a period of unemployment that lasted for two weeks or longer. Not surprisingly, among those currently employed, those who had recently experienced a period of unemployment (67%) remain more concerned about finding or keeping a stable job compared to those who had not experienced such a period (43%).

TABLE 1
Outlook on employment

Population group:	Total sample	In labour force	Employed full-time	Employed part-time	Self-employed	Unemployed & looking for work
Very or somewhat worried about themselves or a member of their immediate family finding or keeping a stable, full-time job	47%	50%	46%	53%	53%	71%
Now is a bad time to find a job in the city or area where you live	40%	40%	38%	37%	45%	59%
Personally experienced a period of unemployment that lasted for two weeks or longer, in the last 12 months (asked only to those who are employed)	–	–	18%	37%	21%	–

Subsample: Those surveyed between February 28 and March 9 (n=2,899)

³ A total of 2,899 Canadians were surveyed during this period across all 13 jurisdictions. The data for this period are weighted separately by age, gender, region and education to ensure that they are representative of the country as a whole.

⁴ This figure is slightly higher than the official unemployment rate prior to the pandemic, but the question wording in this survey is somewhat more general than that used in Statistics Canada's Labour Force Survey.

In fact, the survey shows that unemployment is an experience that touches many Canadians, at least indirectly, regardless of whether they are in the labour force or have recently changed jobs. Among all those surveyed on or before March 9, 27 percent said that someone in their immediate family had been unemployed in the last 12 months, and 31 percent said they had a close friend in the same situation.

Before looking at how the outlook on employment shifted as the COVID-19 pandemic took hold in Canada, it is worth examining who was most concerned about job security in the pre-pandemic period (February 28 to March 9).

- The most important factor is **region** (or province). Among the provinces, those in Alberta (60%) are the most likely to be worried about themselves or a family member finding or keeping a good job, while those in Quebec (37%) are the least likely. Similarly, 74 percent of Albertans said it was a bad time to find a job where they live, compared with only 15 percent of Quebecers. However, the same proportion of Albertans (24%) and Quebecers (23%) reported that they themselves have been unemployed at some point in the past 12 months.
- **Age** is also an important factor. Older workers are less likely to be worried about job security: 40 percent of those age 55 and older are worried about themselves or a family member finding or keeping a job, compared to a high of 56 percent among those aged 25 to 34.⁵ While younger workers between the ages of 18 and 24 are more likely to say it is a good time to find a job where they live (50%, compared to 36% for those between the ages of 25 and 54), they are more likely to say they have personally experienced a period of unemployment in the last 12 months (39%, compared to 22%).
- **Immigrants** and non-immigrants are equally likely to be worried about job security and to say it is a bad time to find a job where they live, but recent immigrants (42%) (those who have lived in Canada for 10 years or less) are twice as likely as average (22%) to say they have personally experienced a period of unemployment in the last 12 months.
- Not surprisingly, those who hold a **permanent job** are less concerned about their employment and less likely to have recently experienced unemployment than those who hold a temporary, casual or seasonal job. Among those who are permanently employed, 46 percent are worried about themselves or a family member finding or keeping a good job; and 16 percent have recently experienced unemployment, compared with 55 percent and 52 percent for those employed on a temporary, casual or seasonal basis.
- **Men and women** are equally likely to be worried about job security, but women (44%) are more likely than men (35%) to say that now is a bad time to find a job where they live.
- **Educational attainment** is not a major factor, with those with and without a post-secondary education being equally likely to be worried about job security and to say it is a bad time to find a job. However, those without a post-secondary education (30%) are more likely than those who continued their education past high school (18%) to have been unemployed within the past 12 months.

⁵ Note that some older workers may be more worried about job security for their younger family members than for themselves.

C. The shift in outlook on employment

Events unfolded rapidly in Canada in the week beginning March 9. These included the announcement at the start of the week of the first death in Canada due to the virus; the declaration on March 11 by the WHO that the COVID-19 outbreak constituted a pandemic; and the beginning of the prime minister's own period of self-isolation, leading to the cancellation of the first ministers' meeting in Ottawa, scheduled for March 12.

On March 12, Ontario announced that its public schools would stay closed for two weeks following the March break; this was soon followed by similar announcements by other provinces. Shortly thereafter, universities and colleges in Canada began announcing that instruction would move online. Over the course of those same few days, both the price of oil and stock market indices fell sharply, and major sporting and cultural events began to be cancelled. By the end of week, Canadians abroad were advised to return home and new restrictions on the entry of non-citizens into Canada were imposed. This was soon followed

by declarations of provincial and local states of emergency, with the progressive closure of non-essential workplaces and public venues.⁶

The 2020 Survey on Employment and Skills documents the significant shift in Canadians' outlook on employment that took place over this period. To illustrate this, this report adopts a regional approach, examining shifts in opinion in different provinces and regions over different periods from late February to early April (see text box for more detail). There are two reasons for this. First, as noted previously, there were significant differences in employment outlook across regions prior to the pandemic; national averages therefore are not necessarily the best indicator to follow. Secondly, because the survey was completed at slightly different times in different provinces and regions, the results for the period after March 9 are not fully representative at the national level.⁷ Changes over time are best shown by comparing results within regions between slightly different pre-pandemic and in-pandemic periods.

⁶ <https://toronto.ctvnews.ca/timeline-emergency-orders-impacting-toronto-and-ontario-amid-the-covid-19-pandemic-1.4881738>; <https://www.hilltimes.com/2020/03/25/a-timeline-of-canadian-covid-19-developments/239788>

⁷ Recall that the results for the sample collected on or before March 9 are weighted to ensure that they representative at the national level; see note 3.

A regional approach

Caution needs to be exercised in using the survey data to compare opinions before and after the onset of the COVID-19 pandemic in Canada in mid-March. Because the survey was not originally designed for this purpose, the survey samples in early and late March are not equally representative. In particular, in some jurisdictions (notably Ontario), survey responses were collected much earlier – mostly before the crisis took hold – while those in others (notably the three territories) were collected much later.

In order to illustrate the effect of the onset of the pandemic, this section of report therefore adopts a regional approach, examining shifts in opinion in different provinces and regions over different periods, from late February to early April. The precise dates of three periods in each region or province – pre-pandemic, transition and in-pandemic – vary slightly, to reflect the different dates during which the survey was conducted and to ensure that each of the three periods has a sufficient number of survey responses to consider (see Table 2).⁸

The Atlantic provinces are grouped together, as are Manitoba and Saskatchewan, and the North, because in each regional group, the survey was conducted over the same period and the responses across individual jurisdictions within each region were broadly similar. While the survey was conducted over the same period in Alberta and B.C., these provinces are not grouped together because the responses to questions relating to the economy are very different. Results for Alberta and B.C. are also limited to two periods.⁹

TABLE 2
Survey periods, by region

Region		Period 1 Pre-pandemic	Period 2 Transition	Period 3 In-pandemic
Atlantic	Dates	Feb. 28 – Mar. 9	Mar. 10 – 15	Mar. 16 – 30
	n =	360	198	391
Quebec	Dates	Feb. 28 – Mar. 8	Mar. 9 – 11	Mar. 12 – 25
	n =	446	310	144
Ontario	Dates	Feb. 28 – Mar. 6	Mar. 7	Mar. 8 – 24
	n =	368	419	114
Manitoba / Saskatchewan	Dates	Feb. 28 – Mar. 10	Mar. 11 – 15	Mar. 16 – 27
	n =	317	164	319
Alberta	Dates	Feb. 28 – Mar. 8	–	Mar. 9 – 25
	n =	373	–	127
British Columbia	Dates	Feb. 28 – Mar. 8	–	Mar. 9 – 25
	n =	356	–	144
North	Dates	Mar. 9 – 14	Mar. 15 – 20	Mar. 21 – Apr. 4
	n =	144	142	164

⁸ The adjustment of the period dates for each region is designed to distribute the sample as evenly as possible across each period in each case. This improves the reliability of the findings. It should be noted, however, that the choice of the precise cut-off dates does not significantly alter the overall pattern of the findings.

⁹ Note that regional results are computed using the national survey weighting factors, with the exception of results for the North.

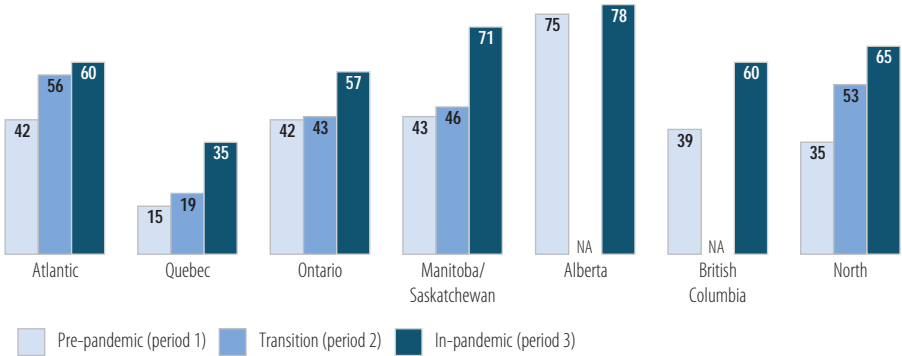
The survey shows an almost uniform jump in pessimism about employment prospects over the month of March.

- For example, in Atlantic Canada, the proportion saying that it was a bad time to find a job where they live increased from 42 percent in the pre-pandemic period to 60 percent in the in-pandemic period.
- In Quebec, where residents were initially more optimistic, the proportion saying it was a bad time to find a job nevertheless more than doubled, from 15 percent to 35 percent.
- There were also shifts in Ontario (from 42% to 57%), Manitoba and Saskatchewan (from 47% to 71%), B.C. (from 39% to 60%) and the North (from 35% to 65%).

- The only province that did not record a significant change was Alberta, and this was simply because the level of pessimism there was already very high before the pandemic took hold.

In some areas of the country, there was also an increase in the proportion that were worried about themselves or a member of their family finding or keeping a stable, full-time job. This is most notable in Ontario (increasing from 47% in the pre-pandemic period to 66% in the in-pandemic period), and in Manitoba and Saskatchewan (increasing from 43% to 58%).

CHART 1
Now is a *bad* time to find a job where I live (%)
 By survey period (note: exact date of each period varies by region)



Q3.
Thinking about the job situation in the city or area where you live today, would you say that it is now a good time or a bad time to find a job?

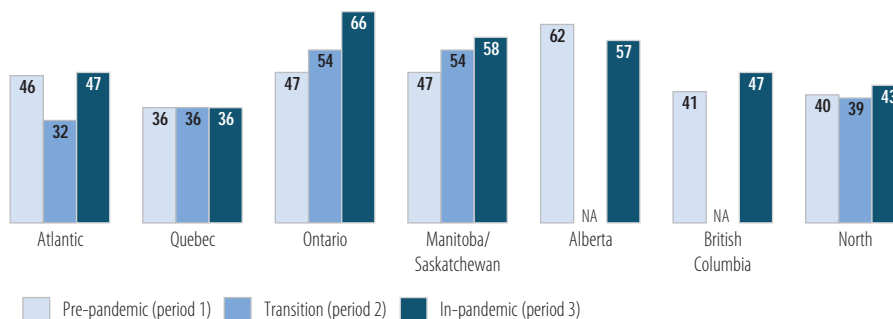
More uniformly across the country, among those who were worried about job security, there was a clear jump in the proportion that cited the novel coronavirus as the reason. In Ontario, for instance,

only a handful (2%) of respondents mentioned the virus as the reason for being worried in the days up to March 6. In the days on or after March 8, this had grown to 28 percent.¹⁰

CHART 2

Worried about finding or keeping stable, full-time job (%)

By survey period (note: exact date of each period varies by region)



Q18.

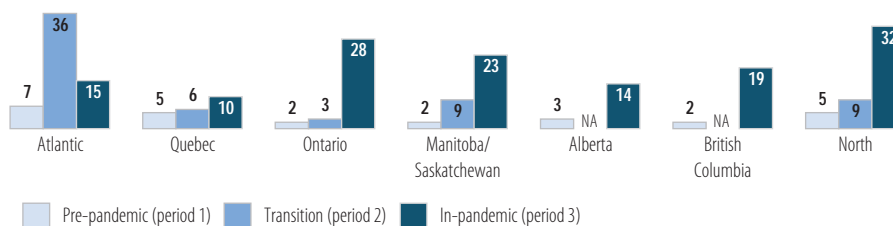
Are you very, somewhat, not very, or not at all worried about you or a member of your immediate family finding or keeping a stable, full-time job?

CHART 3

Worried about finding or keeping stable, full-time job because of COVID-19 (%)

Subsample: those who are very or somewhat worried

By survey period (note: exact date of each period varies by region)



Q18.

Are you very, somewhat, not very, or not at all worried about you or a member of your immediate family finding or keeping a stable, full-time job?

Q19.

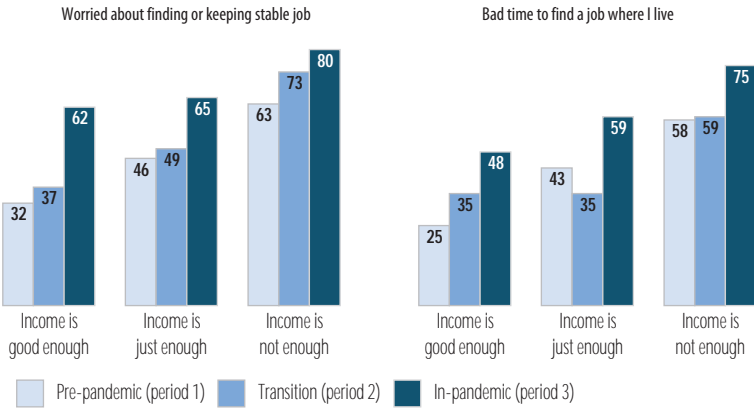
Why are you worried? [Open-ended question]

¹⁰ This was an open-ended question. Many others may also have felt that the pandemic was affecting job security, but may have expressed this worry without mentioning the COVID-19 virus, for instance, by referring more generally to worsening economic conditions.

Looking beyond regions, the shift in outlook was shared across a range of groups, including both men and women, young and old, those with and without a post-secondary education, those earning lower and higher incomes, and those employed in different job and occupational categories.¹¹ Within some provinces or regions, the shift is sometimes more pronounced among some groups than

others, but these patterns are not consistent across the country.¹² This, in turn, speaks to the regional nature of Canada’s labour market and the difficulty in generalizing trends across regions. That said, the main point to emphasize is that, on the whole, the worsening in outlook on employment that took place over the month of March in Canada generally was widely shared.

CHART 4
Employment outlook, by self-described income group (%)
 Subsample: Ontario, by survey period



Q18.
Are you very, somewhat, not very, or not at all worried about you or a member of your immediate family finding or keeping a stable, full-time job?

Q3.
Thinking about the job situation in the city or area where you live today, would you say that it is now a good time or a bad time to find a job?

Q48.
Would you say your total household income is: Good enough for you, and you can save from it; Just enough for you, so that you do not have major problems; Not enough for you and you are stretched; Not enough for you and you are having a hard time?

¹¹ It is important to keep in mind that the survey measures changes in outlook (perception) and not material circumstances (employment status or earnings).

¹² Breakdowns are also not available for all subgroups in each province or region across all three periods due to sample size limitations.

D. Support and resilience

In view of the extent of the disruption to the Canadian economy brought about by the pandemic, the change in employment outlook is hardly surprising. What is perhaps less easy to predict is the extent to which these changes have affected the confidence that Canadians have in facing adversity, the extent to which they felt supported by government, and their outlook on the future more generally.

In general, the survey suggests that Canadians did not lose confidence in themselves or in the social safety net as the pandemic took hold in the month of March.

In this case, we begin by presenting data at the national level for the periods on or before, and then after, March 9 (the start of the week that saw the dramatic changes mentioned earlier).¹³ On either side of this date, Canadians remained equally likely to:

- Have a hopeful view of the future.
- Be confident in their own abilities, even when faced with challenges.
- Feel they can bounce back quickly after hard times.
- Say they have people they can depend on when they really need it.

Table 3
Trust and resilience

Measure	Surveyed between Feb. 28 and Mar. 9 (n=2,899) (%)	Surveyed between Mar. 10 and Apr. 4 (n= 2,101) (%)
Most people can be trusted	37	33
Always or often have hopeful view of the future	47	51
Always or often confident in abilities, even when faced with challenges	61	63
Always or often able to bounce back quickly after hard times	51	54
Always or often have people to depend on when really needed	55	58

¹³ Since responses to the measures under consideration in this section do not vary as significantly by province as do measures relating to employment and the economy, we can present the data at the national level – even though the regional composition of the sample differs in the pre- and in-pandemic periods. As noted in the following section, analysis of results for regional samples confirm the same overall pattern of findings. Note that the analysis was undertaken using slightly different time periods and applying different weighting factors; in each case, the same overall pattern was observed.

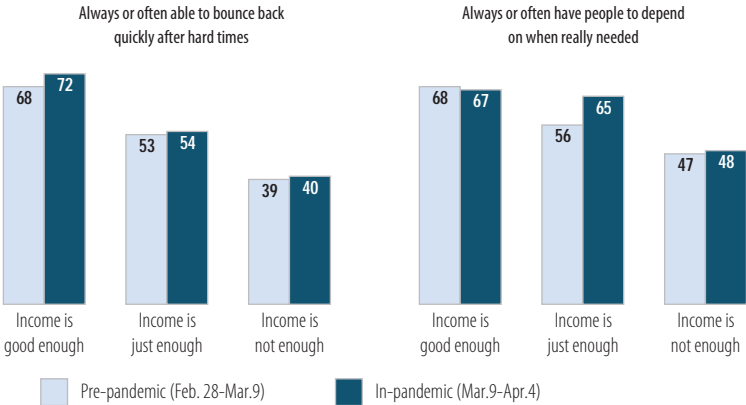
They also remained about as likely to say that most people can be trusted, although this was the minority view. On or before March 9, 37 percent said that, generally speaking, most people can be trusted, while 58 percent said that you cannot be too careful in dealing with people; after that date, the figures were 33 percent and 63 percent, respectively.

An analysis of these questions over the different survey periods by province or region confirms that these results are not influenced by the regional composition of the samples in the two periods. When looked at separately by region, the general pattern is also one of stability, with no major changes in responses to these questions.¹⁴

While the absence of any immediate overall drop-off in Canadians’ outlook on the future and

sense of resilience in the wake of the pandemic is encouraging, it is also important to recall that these orientations vary in important ways among different groups. For instance, those with more secure jobs, higher levels of educational attainment and higher incomes tend to feel more resilient (for example, are more likely to be confident in their abilities and to feel they can bounce back quickly after hard times). They are also more likely to say that most people can be trusted. The same is true of men compared to women. Thus, while there was no overall decline in feelings of resilience as the pandemic’s impact began to be felt, nonetheless some groups within Canadian society faced that impact with a weaker sense of having people to depend on or in their ability to bounce back.

CHART 5
Resilience, by self-described income group (%)
 By survey period



Q11.
 Thinking about your life in general, how often would you say you: (c) Are able to bounce back quickly after hard times; (d) Have people you can depend on to help you when you really need it

Q48.
 Would you say your total household income is: Good enough for you, and you can save from it; Just enough for you, so that you do not have major problems; Not enough for you and you are stretched; Not enough for you and you are having a hard time?

¹⁴ There is one possible exception to this rule, in that it appears that the outlook in Atlantic Canada became much less positive in the in-pandemic period (after March 16); for instance, Atlantic Canadians became less likely to say they were always or often able to bounce back quickly after hard times. However, many more Atlantic Canadians said they were *sometimes* able to bounce back, and fewer said they were rarely or never able to do so. The change is thus more modest than first appears, and is not significant enough to undermine the general pattern emphasized in this section of the report.

The same overall patterns are evident when we turn to consider Canadians' expectation that they might receive support from the governments and government programs in the event that they lost their jobs. Overall, for instance, the survey finds that, in the pre-pandemic period, about three in five (61%) non-retired Canadians said it is either very or somewhat likely that they would receive employment insurance should they become unemployed. At the same time, one in two (51%) were very or somewhat confident that, in this event, a government employment centre in their community would help them find a new job. Neither of these figures varied significantly between the pre-pandemic and in-pandemic periods covered by the survey.

More generally, there was also no significant change over this period in the proportion of Canadians saying that governments have a positive impact on most people's lives.

That said, there are important variations among different groups of Canadians in their responses to these questions. Again, those with more stable employment, higher levels of education and higher incomes are more likely to expect support from government insurance programs or service centres should they become unemployed. What's notable about these findings, of course, is that those Canadians who are at greater risk of losing their jobs in a crisis such as the one posed by the current pandemic are the least likely to be facing that crisis with a sense that they are supported by a social safety net. They are also the least likely to say that governments generally have a positive impact on most people's lives.

The 2020 Survey on Employment and Skills therefore offers both grounds for reassurance and for caution. The fact that there was no immediate

overall drop-off in Canadians' sense of resilience and confidence in the availability of support in the wake of the pandemic is reassuring. But the fact that those who are most at risk are the least likely to feel either this resilience or this confidence is a reminder of the challenge that policy-makers generally face in delivering help to those who need it most. Unemployed and low-income Canadians are about twice as likely to see governments having a negative impact on most people's lives than a positive one – a pattern that remained true both before and after the pandemic took hold.

It also remains possible that further changes in opinion occurred after the survey was completed, both with the prolonging of the economic shutdown (and the resulting loss of income for many) and with the announcement by governments of additional support measures to help those affected. The 2020 Survey on Employment and Skills provides initial indicators on resilience and confidence in the social safety net that can be revisited in future studies to assess the longer-term impact of these events.

Table 4
Support from government

Measure	Surveyed between Feb. 28 and Mar. 9 (n=2,899) (%)	Surveyed between Mar. 10 and Apr. 4 (n= 2,101) (%)
Very or somewhat likely to receive employment insurance if you lost your job (subsample: excludes retired persons)	61	65
Very or somewhat confident that a government employment centre in your community would help you find a new job if you found out that you were about to lose your job (subsample: excludes retired persons)	51	50
Governments have a positive impact on most people's lives	29	32

E. Thinking ahead

As Canadians embrace the measures needed to limit the spread of COVID-19, attention has begun to turn to the question of when and how to lift restrictions on movement and gatherings in order to restart the economy. At the time of writing, it appears likely that any such restart is still some weeks or months away – and, in any event, will be gradual. Many Canadian workers may be asked to continue to work from home or at least in ways that allow for physical distancing. It may also be the case that some workplaces or jobs will be changed forever, either because the challenging circumstances of the pandemic gave rise to innovation or, more worryingly, because the pandemic will have a lingering presence that will make it difficult for things to “get back to normal.”

The survey includes some results that offer reasons for both hope and concern about the future of work in Canada. In the first instance, there are indications that Canadian workers are open to the types of work arrangements that may become increasingly more common, even once the most immediate emergency has passed.

- **Technological change.** On the whole, Canadian workers seem to be comfortable with the ways in which technology has been impacting the world of work. Two-thirds of those in the labour force say that, over the past five years, new information or computer technologies have changed the way they do their job to a great or some extent. And for those who have experienced change, the outcome is seen as more positive than negative, with majorities saying their jobs became more enjoyable and easier to perform. Those who have seen the

greatest extent of change at work due to new technologies are also the most likely to report being satisfied with their current job. More generally, most Canadians – including majorities in all age groups and occupation types – *disagree* with the notion that new technologies are causing more problems than they are solving. These findings suggest that, on the whole, Canadian workers are predisposed to be open to new work arrangements that are more reliant than ever on technologically-assisted communication and collaboration.

- **Types of skills.** Canadians also appear to recognize the importance of the types of skills that may be increasingly in demand as work resumes. Asked which skills were the most important for them in finding a job after they finished their education, Canadians are most likely to identify communication skills (36%), the ability to solve problems (33%), and the ability to collaborate with others and work in teams (31%) – as well as technical or subject-specific knowledge (31%).¹⁵ Asked to name the *one* type of skill that was the *most* important in getting their current or most recent job, technical or subject-specific knowledge comes out on top, but with only one in four mentions (24%).¹⁶ Many Canadians mention communication skills (18%), the ability to collaborate with others (12%), leadership skills (11%) and the ability to solve problems (11%) as most important. Similarly, about one in four (24%) also mention technical or subject-specific knowledge when asked about the most important type of skill for younger people just starting out in their

¹⁵ Answers to this question add up to more than 100 percent, as multiple mentions were possible. The subsample of respondents excludes those still pursuing their formal education (students).

¹⁶ For this and the following questions mentioned in this paragraph, only one response was possible.

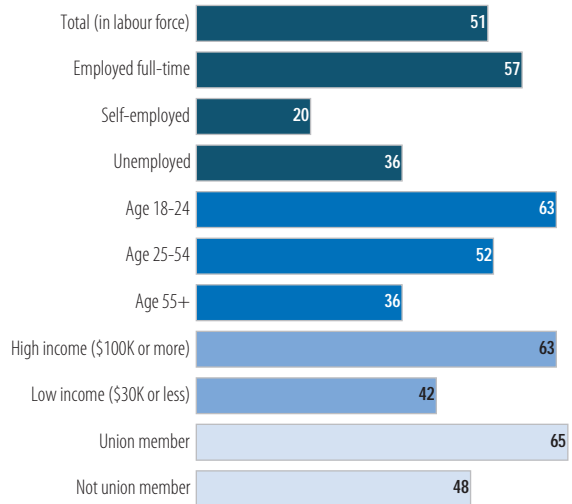
careers; but many mentioned communication skills (16%), the ability to collaborate with others (15%) and the ability to adapt quickly to change (15%). It is also worth noting that skills beyond technical or subject-specific knowledge are mentioned by those in a variety of occupation types. For instance, in terms of the skills deemed most important to getting their current job, communication skills are most likely to be mentioned by those working in retail or sales, while the ability to collaborate and work in teams is most likely to be mentioned by manual labourers.

At the same time, survey responses relating to **skills training** send signals that are more mixed. On the one hand, workers who have had access to some form of skills training in the past five years are generally positive about the experience and its outcomes. For instance, nine in ten of those who have participated in a work-related skills training course provided by their employer in the past five years say that it was very or somewhat helpful for them in terms of developing the skills they needed to succeed at work. On the other hand, only one in two of those in the labour force have accessed this type of training; in other words, over the past five years, half of the labour force has had no employer-delivered skills training. Older workers, non-unionized workers and those with low-income jobs are less likely than others to have participated in this type of training.

It is also notable that, when asked about the best way for them, personally, to learn new work-related skills, Canadians in the labour force are more likely to say it is by learning from co-workers on the job (40%) than by learning at work through a formal training course provided by their employer (28%). This speaks to the importance of peer-to-peer workplace interaction and collaboration, not only for job satisfaction, but for skills development.

CHART 6

Participated in a training course to improve skills, provided by employer (within past 5 years)
Subsample: in labour force



Q35.

In the past five years, have you participated in any of the following forms of work-related training to improve your skills? (a) A training course that was provided by your employer?

It also speaks to the importance of ensuring workers have ample learning opportunities on the job and inside the workplace, rather than in classrooms or training centres. The question will be whether this type of interaction and these types of opportunities, which have been disrupted in the short term, will soon resume, or whether new work arrangements will have a negative impact on peer learning over the medium to long term as well.

F. Conclusion

The 2020 Survey on Employment and Skills documents the significant shift in Canadians' outlook on employment that occurred during the month of March, as the COVID-19 pandemic took hold and non-essential workplaces were closed. Canadians became more worried about themselves or a member of their family being able to find or keep a stable, full-time job; and more likely to say that now is a bad time to find a job in their community. In some provinces or regions, these changes were more pronounced among some groups than others, but overall, they affected workers from all backgrounds.

It is important to document these changes, even if they are hardly surprising. The survey provides an initial snapshot of the immediate situation after the pandemic that can be revisited in future studies. That said, there are other findings in the survey that can inform thinking about the eventual restarting of the economy and return to work.

First, it is important to recall that, prior to the onset of the COVID-19 pandemic, and despite the overall positive employment situation in the country at that time, many Canadians were already concerned about job security, and had direct or indirect experiences with unemployment (i.e., either themselves, or through family or friends). The unemployment rate fails to capture the extent of these perceptions and experiences. It would be a mistake, therefore, to focus only on the need to reopen workplaces, as crucial as that may be. Absent other changes, the restarting of the economy will only bring the country back to a situation in which one in two of those in the labour force are worried about job security for themselves or members of their family.

Second, while it is encouraging that Canadian workers felt equally supported by the social safety net before and after the onset of the pandemic, the fact remains that many do not feel that support. Those with more stable employment, higher levels of education and higher incomes are more likely to feel a sense of resilience and expect support from government should they become unemployed. Overall, two in five of those in the labour force do not think they would receive employment insurance if they lost their job, and only one in two expect help from a government employment centre in their community in finding new employment. The long-term effect of working without confidence in the social safety net has yet to be fully explored; in particular, it is not clear how this may affect decision-making with respect to skills development, which can involve both risk-taking and opportunity costs.

Third, while Canadian workers appear receptive to new information and communication technologies that could facilitate new work arrangements, the availability of training opportunities that would allow them to take advantage of these technologies, especially if the disruption of pre-pandemic work arrangements continues over the longer term, is far from clear. No more than half of those in the labour force has had any employer-delivered skills training over the past five years. The conundrum now facing the country is that the need for such training may now be greater than ever, while at the same time employers' ability to finance and deliver it, given the economic shutdown, may never have been more challenged.

**Environics
Institute**

**The Environics Institute
for Survery Research**

900-33 Bloor Street East
Toronto, ON M4W 3H1

416 969 2457
www.environicsinstitute.org