



# Retail Trade

## A Sector In Transition

## About the Toronto Workforce Innovation Group

Toronto Workforce Innovation Group is a leading-edge research and partnership organization responding to the diverse needs of local communities and businesses in the area of workforce development. It is one of the 26 similar planning groups tasked by the Ministry of Training, Colleges and Universities (MTCU) to work closely with our local economies.

As Toronto's Workforce Planning Board, we conduct dynamic labour market research, disseminate information and convene stakeholders to address workforce development trends, gaps and opportunities. Among similar organizations in Toronto, our multi-stakeholder approach is unique; we work on issues across many sectors and engage stakeholders from a wide range of perspectives including federal government departments, provincial government departments, industry, training institutes, labour groups, and special interest groups to address skills and labour market information needs.

Our research is an on-going and continuous process that includes our numerous consultations and focus groups with employment/training service providers and job seekers in addition to the deep data dive that informs our publications. We work to ensure that Toronto's workforce has the skills and talent it needs to meet the demands of a changing economy.

TWIG achieves its goals through:

- Researching, analyzing and reporting on workforce development trends, gaps and opportunities in Toronto
- Acting as a resource to inform our stakeholders (community groups, educators and trainers, employers, governments, labour groups and media) about Toronto's workforce development issues

## Acknowledgements

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# Executive Summary

Retail trade is a dominant economic sector contributing largely to the Canadian economy. In 2017, the sector contributed 96,525 million<sup>1</sup> towards the Canadian Gross Domestic Product (GDP).

About one-third of Canada's total retail sales have been generated in the three largest census metropolitan areas (CMAs): Toronto, Vancouver, and Montreal with close to half of retail employment located in the Toronto economic region. Retail is the lifeblood of other economic sectors as well. Tourism, construction, finance, real estate, and transportation are all dependent on a healthy retail environment.

Toronto's retail landscape reflects the city's diversity in culture, lifestyles, and incomes. Emblematic of Toronto's place as a premier retailing center – nine of the top 30 malls in Canada are located in Toronto. Although Toronto may have been late to the e-commerce trend, we are currently one of the fastest growing hubs in the world. Increasingly, bricks and mortar front retailers of all sizes are developing sophisticated online shopping platforms. In turn, online retailers are creating storefront shops. The divisions between online and storefront are increasingly blurred as Canadian shoppers are thinking and shopping in multiple dimensions (known as omnichannel shopping). This changing face in retail trade has created a challenging consequence for the sector's skills supply and needs, and impact upon workforce development strategies.

Using Statistics Canada's Canadian Business Counts, this report describes and documents the composition of local retailers in Toronto by the different sub-sectors in retail trade, distribution of the retailers by size (number of employees working in the firm), changes in the number of retail business units by sub-sectors of retail trade.

Census 2016 data and labour force survey is used to report and analyze retail trade workforce demographics and income statistics by occupation of those employed in the sector. A locational survey of retailers is conducted at one of the biggest shopping malls in Canada, Yorkdale Shopping Centre. This provides a snapshot of the characteristics and essential skills sets required for different positions in retail stores, the recruitment and retention challenges faced by employers in retail stores. Based on secondary research, the report also provides an overview of occupations that retail trade employees commonly move into and an account of the fastest growing jobs in retail trade.



# Introduction



## Queen Street West

### Toronto, Ontario

Toronto's uber-trendy, two-kilometre shopping strip is home to the city's top retailers, art galleries, bars and restaurants.

Toronto's retail trade sector is one of its most crucial industries and the sector is playing a significant role in the city's economic development and social progress in the city's neighbourhoods. The retail sector of the city is faced by an exciting but challenging transformation; marked by the rise of online shopping, omnichannel retailing, and emergent competition as technology drives constant change in the way Torontonians shop. Neighbourhood shopping areas, malls, retail strips, plazas, and touristic districts are some of the most prominent elements of Toronto's urban landscape. Downtown, Queen West, and South Etobicoke are quickly becoming premier North American locations for retailers.

Toronto is being supported by Toronto's 81 Business Improvement Areas, reflecting the city's burgeoning neighbourhood retailers. Although major international retailers are looking to get a toe-hold in the city, small and

entrepreneurial retailers still dominate Toronto's retail landscape. More than 50 international brands entered Canada by opening stores or concessions in 2017 with over half of the stores located in Toronto<sup>2</sup>.

Although increasingly, brick and mortar storefront retailers of all sizes are developing sophisticated online shopping platforms, according to a recent study by PricewaterhouseCoopers (PwC) Canada<sup>3</sup>, a majority of Canadian consumers love the in-store experience: Nearly two thirds consider brick-and-mortar retail their primary holiday shopping channel, with the rest focused on online. However, most millennials (51 per cent) think of online shopping first.

Between July 2017-18, the retail sub-sector in the City of Toronto that experienced the largest increase in the number of business units was gasoline stations (27 per cent) while the sub-sector that had the most decline in the number of business units was electronics and appliances stores (37 per cent)

Based on the Census 2016, the top three sub-sectors in retail trade with the greatest number of employees are Food and beverage stores, Clothing and clothing accessories stores and General merchandise stores

## Quick Facts on Retail Trade

As per the Canadian Business Count, June 2018, the top three retail sub-sectors with the greatest number of firms were - Clothing and clothing accessories stores (21 per cent), Food and beverage stores (20 per cent) and Health and personal care stores (18 per cent).

In 2017, retail trade in Toronto, Census metropolitan area (CMA) comprised of 15.3 per cent of total sales in Canada<sup>4</sup>

Toronto Employment Survey, 2017 reported a 16 per cent rise in new retail establishments in the City of Toronto between 2017-18. However, there was a net decline in business establishment counts by 140 units in the sector compared to the previous year

In 2017, 40 per cent of employees<sup>6</sup> in retail trade in Toronto, CMA were high school graduates indicating low educational and skills required for most retail positions

Labour Force Survey data of 2017 revealed that retail trade accounts for 11.3 per cent of total employment in Toronto, CMA

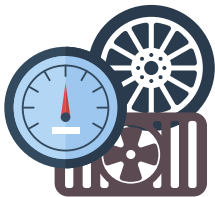
The total number of employees in the sector was 152,350 in 2017 in the City of Toronto<sup>5</sup>

According to the 2017 Toronto Employment Survey, retail added 4,750 new jobs in the City of Toronto in the year 2017 leading to 3.2 per cent employment growth in the sector compared to the previous year

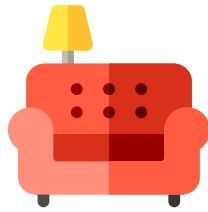
# Background: Retail Trade Sector

For the purposes of analyzing the composition of Toronto's retail trade sector, we primarily used the North American Industry Classification System (NAICS). This is the standard classification system used by Statistics Canada to categorize business establishments in order to collect, analyze, and publish data related to the economy and the labour force. At its highest level, the NAICS hierarchy divides the economy into 20 sectors. At lower levels, it further distinguishes the different economic activities in which businesses are engaged by subsectors.

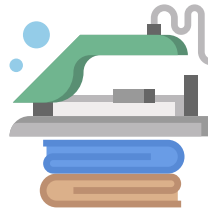
NAICS, defines retail trade (NAICS 44-45)<sup>7</sup> as the sector primarily involved in the sale and distribution of merchandise. This sector comprises of two main types of retailers, store and non-store retailers. While store retailers attract walk-in customers for products and related services, non-store retailers reach out to customers and sell via other methods (i.e. infomercials, direct-response advertising, traditional and electronic catalogs, in-home demonstrations and vending machines). The following are the twelve sub-sectors that operate under retail trade.



Motor vehicle and parts dealers (NAICS 441)



Furniture and home furnishings stores (NAICS 442)



Electronics and appliance stores (NAICS 443)



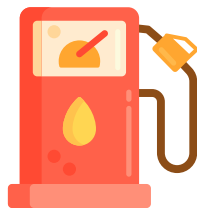
Building material and garden equipment and supplies dealers (NAICS 444)



Food and beverage stores (NAICS 445)



Health and personal care stores (NAICS 446)



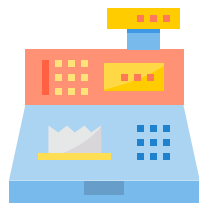
Gasoline stations (NAICS 447)



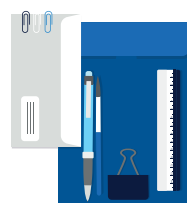
Clothing and clothing accessories stores (NAICS 448)



Sporting goods, hobby, book, and music stores (NAICS 451)



General merchandise stores (NAICS 452)



Miscellaneous store retailers (NAICS 453)



Non-store retailers (NAICS 454)

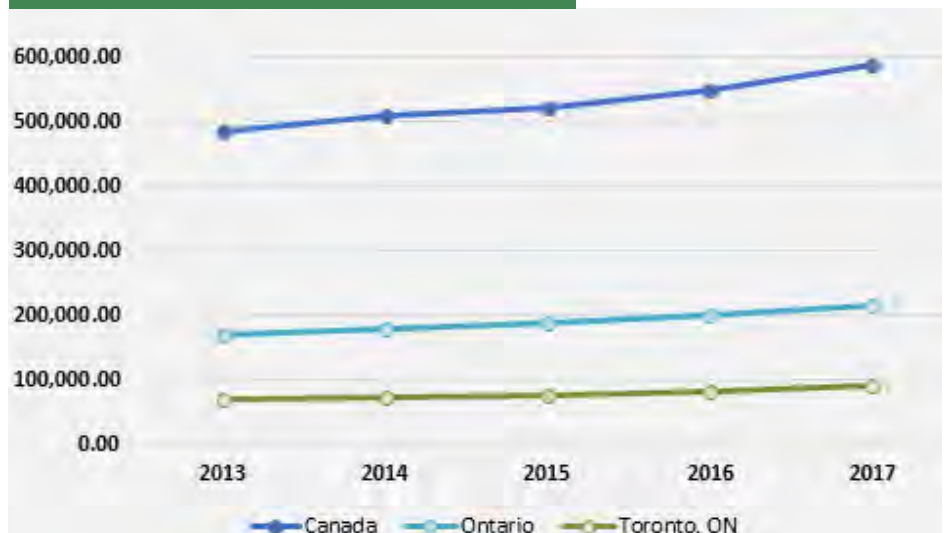


# Sales in Retail Trade

Since 2004, when Statistics Canada began publishing retail sales data at the CMA level, about one-third of Canada’s total retail sales have been generated in the three largest census metropolitan areas (CMAs): Toronto, Vancouver, and Montreal<sup>8</sup>. Figure 1 represents a persistent rising trend in retail trade sales at national, provincial and CMA level in the past five years.

According to the Retail Council of Canada<sup>9</sup>, in 2017, of the total retail sales in Canada, 36.7 per cent of it were generated in Ontario while 15.3 per cent of it were in Toronto, CMA. Also, 42 per cent of the province’s sales is derived from sales in Toronto. These numbers suggest that Ontario and Toronto, CMA is a significant driver to the national sales figure of retail trade. Between 2013 and 2017, the average annual growth rates in sales in Canada, Ontario and Toronto, CMA were 5 per cent, 6.4 per cent and 7 per cent respectively.

**FIGURE 1: Annual Sales in Retail Trade (\$)**



Source: Retail Council of Canada





# Types of Retailers in the City of Toronto

Based on NAICS classification, as discussed in the background section retail trade comprises of twelve unique sub-sectors. Figure 2 illustrates the share of each of these sub-sectors in retail trade in terms of the number of firms. According to the Canadian Business Counts (June 2018) data, in terms of the number of firms, retail trade in the City of Toronto is dominated by three types of retailers as seen here:

## Top 3 retail sub-sectors with the greatest number of firms, June 2018



Clothing and clothing accessories (21%)

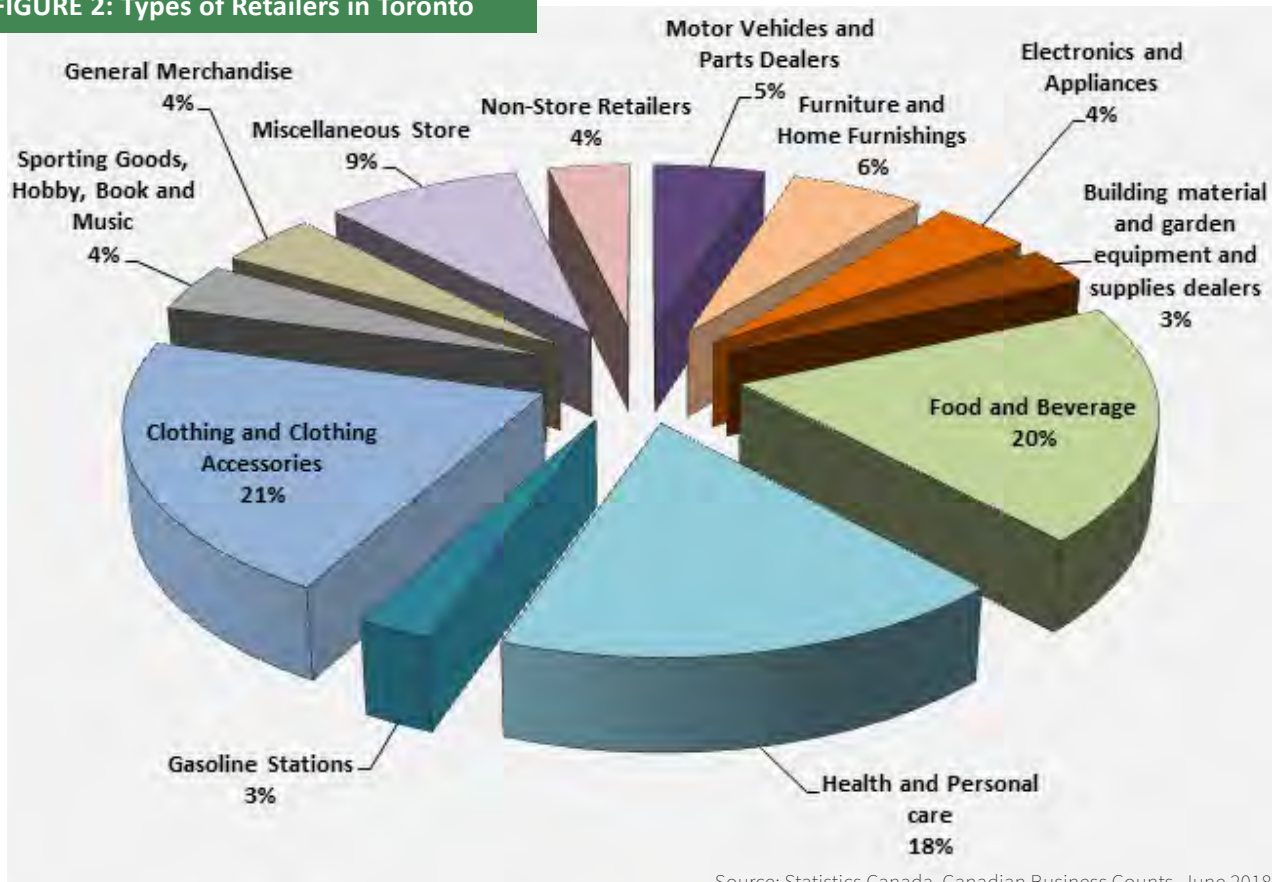


Food and beverage (20%)



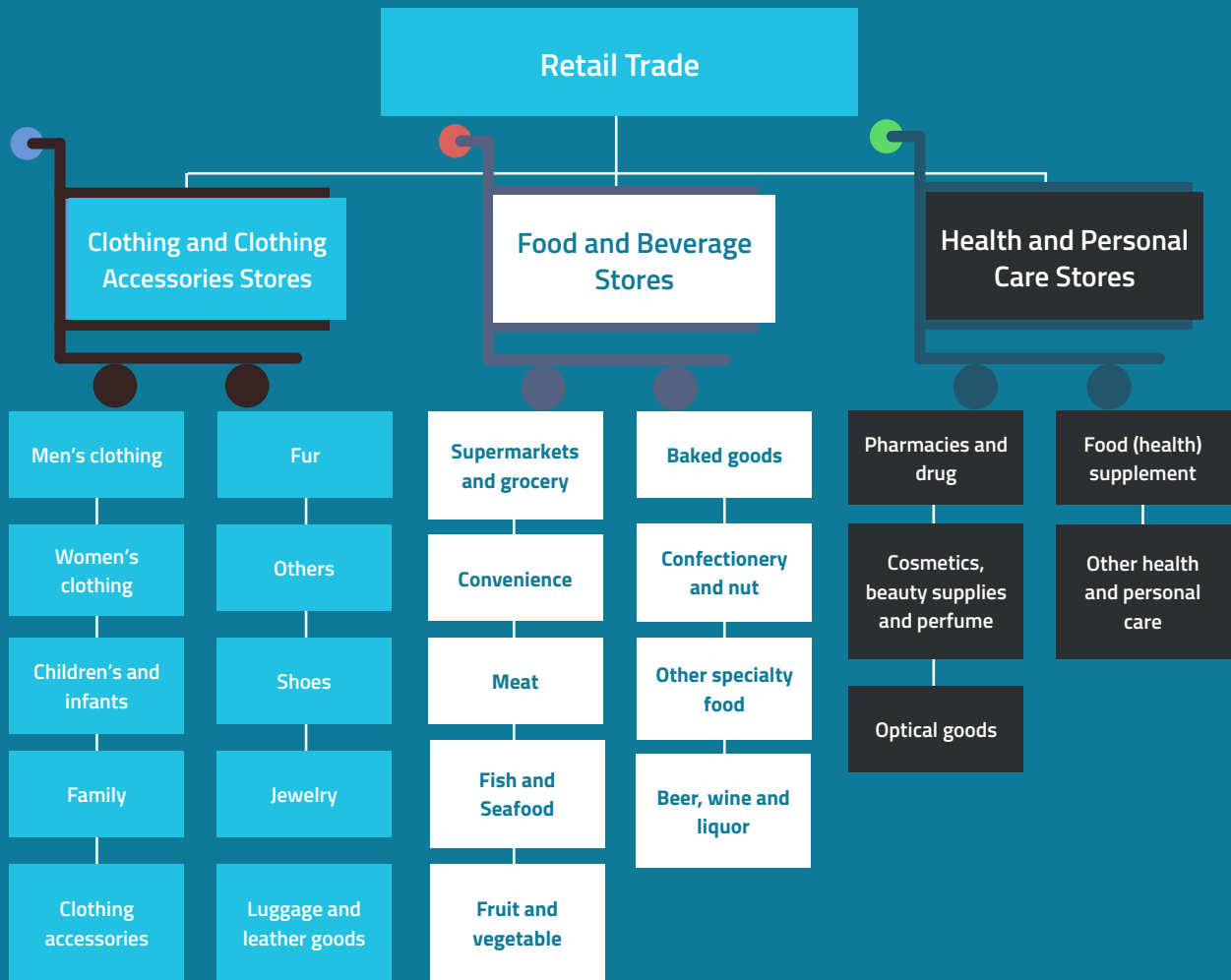
Health and personal care (18%)

**FIGURE 2: Types of Retailers in Toronto**



Source: Statistics Canada, Canadian Business Counts, June 2018

The three dominant retailers are comprised of a variety of retail business units whose products are in high demand among Torontonians.



## Size of Retailers in the City of Toronto

Using Statistics Canada's Canadian Business Counts (CBC), Table 1 displays a breakdown of the number of business establishments of different sizes<sup>10</sup> (defined by number of employees) for all the twelve unique sub-sectors of retail in the City of Toronto as of June 2018. Of all the classified businesses with employees, 10.5 per cent of them can be categorized as retail trade in the City of Toronto. According to the Canadian Business Count (June 2018), there were 9,635 retailers in Toronto, that had no employees versus 9,847 retail business units that hired staff members to operate.

**Table 1: Number of Businesses by Employee Size Range in Retail Trade Sub-sectors in the City of Toronto (June 2018)**

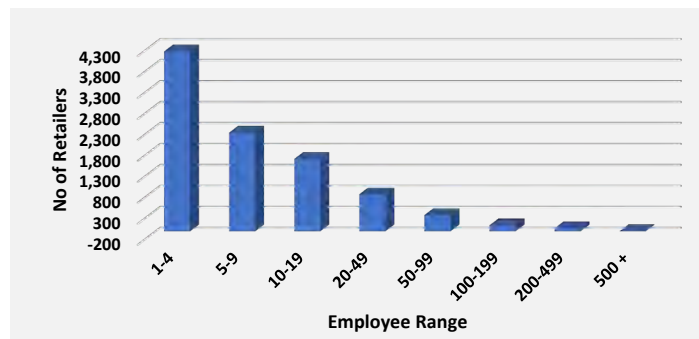
Retail Trade Sub-Sectors	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Motor vehicle and parts dealers	649	503	266	77	45	54	45	13	3	0
Furniture and home furnishings	441	579	285	147	70	63	4	4	6	0
Electronics and appliances	362	391	218	101	29	25	16	2	0	0
Building material and garden equipment and supplies dealers	283	295	108	91	43	24	13	11	5	0
Food and beverage	1,557	1,932	860	365	379	142	95	64	26	1
Health and personal care	1,200	1,748	752	510	236	168	75	6	1	0
Gasoline stations	304	312	63	110	112	18	8	1	0	0

Retail Trade Sub-Sectors	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Clothing and clothing accessories	1,269	2,042	690	514	471	274	77	10	5	1
Sporting goods, hobby, book and music	375	393	139	111	81	38	15	9	0	0
General merchandise	424	419	197	50	113	11	12	14	21	1
Miscellaneous stores	1,299	879	486	229	100	47	15	2	0	0
Non-store retailers	1,472	354	224	47	45	19	10	5	4	0
<b>Retail Trade, Total</b>	<b>9,635</b>	<b>9,847</b>	<b>4,288</b>	<b>2,352</b>	<b>1,724</b>	<b>883</b>	<b>385</b>	<b>141</b>	<b>71</b>	<b>3</b>

Source: Statistics Canada, Canadian Business Counts, June 2018

Figure 3 represents the distribution of retailers by firm size in the City of Toronto as of June 2018. Statistics from the Canadian Business Count (June 2018) shows that retail trade in the City of Toronto is mostly dominated by micro-sized retailers (1-4 employees) and small-sized retailers (5-19 employees). Of all the retailers operating with employees, 44 per cent of them have 1-4 employees, 24 per cent have 5-9 employees, 18 per cent have 10-19 employees, 9 per cent have 20-49 employees, 4 per cent have 50-99 employees. Retailers falling in the range of 100-199 employees and 200-499 employees comprises only 2 per cent of the total share of retailers with employees. There are very few retailers in the City of Toronto that have 500+ employees.

**Figure 3: Distribution of Retailers by Firm Size in the City of Toronto, June 2018**



Source: Statistics Canada, Canadian Business Counts, June 2018

**Table 2: Change in the Number of Businesses by Sub-Sectors in Retail Trade in the City of Toronto (June 2017-2018)**

	<b>Jun-18</b>	<b>Jun-17</b>	<b>Change in No of Businesses</b>
<b>Total number of retailers</b>	9,847	9,890	-43
Motor vehicle and parts dealers	503	490	13
Furniture and home furnishings stores	579	576	3
Electronics and appliance stores	391	624	-233
Building material and garden equipment and supplies dealers	295	292	3
Food and beverage stores	1932	1,886	46
Health and personal care stores	1748	1,687	61
Gasoline stations	312	245	67
Clothing and clothing accessories stores	2,042	2,052	-10
Sporting goods, hobby, book, and music stores	393	403	-10
General merchandise stores	419	442	-23
Miscellaneous store retailers	879	863	16
Non-store retailers	354	330	24

Source: Statistics Canada, Canadian Business Counts, June 2018

Table 2 represents the change in the number of businesses in retail trade in the past one year. Between June 2017-18, the retail sub-sectors that experienced the most decline in the number of businesses/firms was Electronics and appliances store (-233 firms). This was mainly due to a decrease in micro and small-sized stores that fell in this category. Electronics and appliances stores of size 5-9 employees experienced a decline in the number of firms by (56 per cent) followed by the ones of size 10-19 employees (55 per cent) and size 1-4 employees (22 per cent). This could be attributed partly to the dipping sales value<sup>11</sup> of Electronics and appliances stores due to which the small sized firms might have been forced to shut down.

The retail sub-sector that experienced the greatest rise in the number of businesses were Gasoline stations (67 firms). This was mainly due to an increase in the number of Gasoline stations of size 10-19 employees and 50-99 employees of 167 per cent each. Apart from these firm sizes, Gasoline stations of other sizes actually declined during this period. This could be because sales at gasoline stations rose 1.9<sup>12</sup> per cent, largely stemming from higher prices at the pump as sales in volume terms were relatively unchanged.

Appendix A presents the number of retail establishments in the City of Toronto by the six-digit North American Industry Classification System (NAICS) as of December, 2017. This table gives an insight of the number of retail firms of different sizes for the sector (first two digits), sub-sectors (first three digits), industry groups (first four digits), industry (first five digits) and national industries (first six digits).

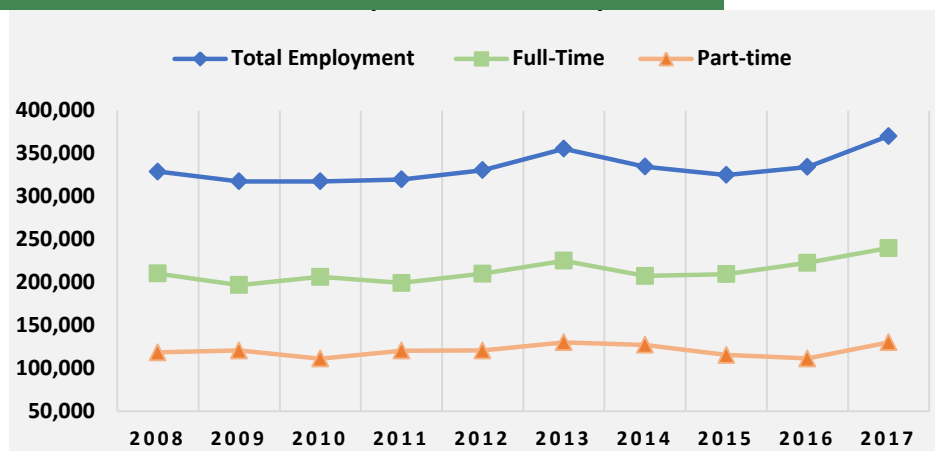
Based on the Canadian Business Counts reported in Appendix A, the top three categories of dominant industry groups within the top three sub-sectors were:

- Jewellery stores (656 units); Women’s clothing (651 stores) and Family clothing stores (525 units) belonging to the sub-sector Clothing and clothing accessories.
- Convenience stores (1375 units); Supermarkets and other grocery stores (848 units) and all Other speciality food stores (418 units) belonging to the sub-sector Food and beverage stores
- Pharmacies and drug stores (1150 units), All other health and personal care stores (599 units) and Cosmetics, beauty supplies and perfume stores (412 units) belonging to the Health and personal care stores.

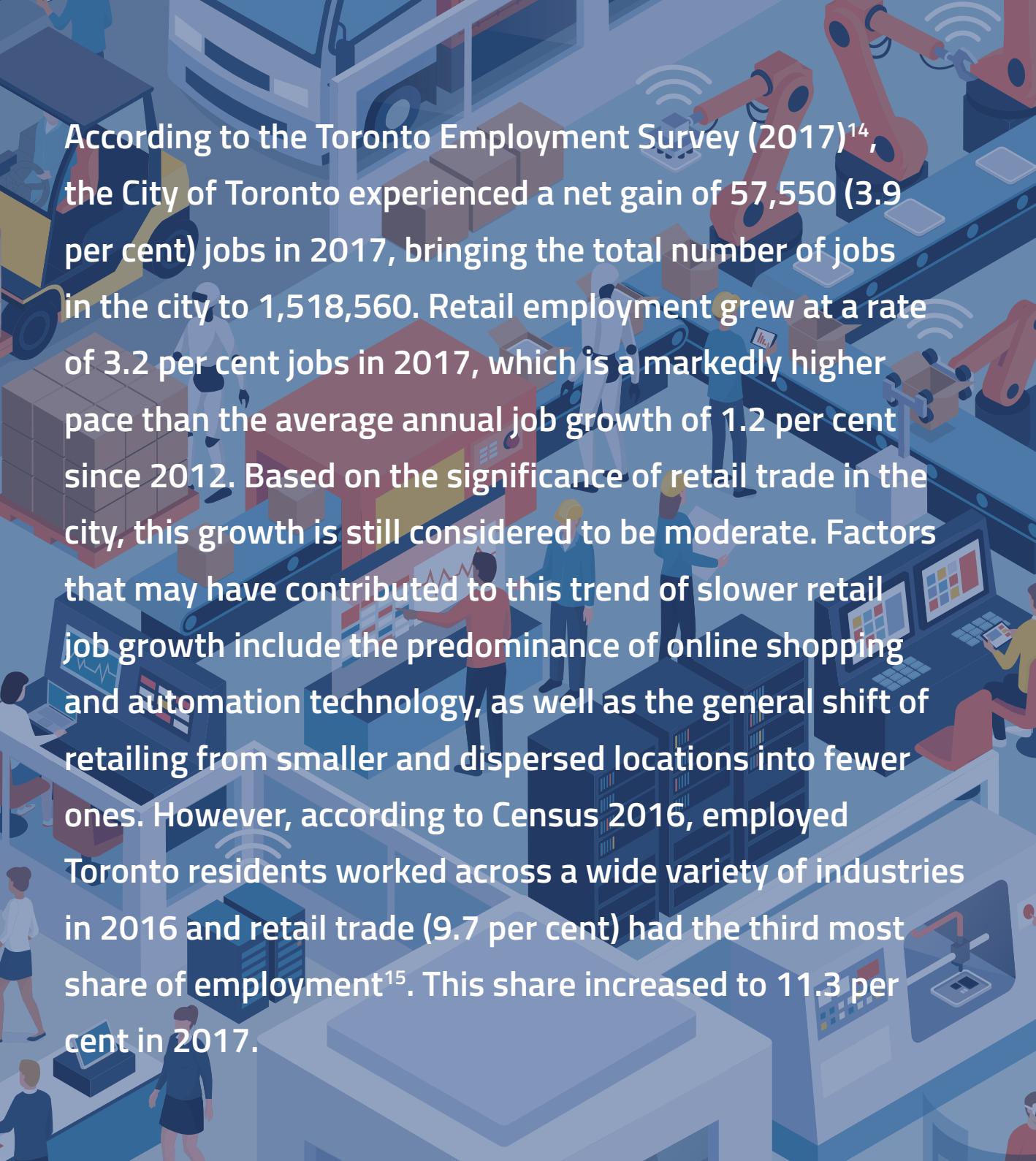
## Employment in Retail Trade

According to the Labour Force Survey, in the year 2017, the total number of people employed by all industries in Toronto, CMA was 3,289,600<sup>13</sup> of which 370,308 (11.3 per cent) were employed in retail trade. Figure 4 below represents the trend in retail trade employment over the last ten years in Toronto, CMA. Majority of the employment is full-time in nature.

**Figure 4: Employment in Retail Trade in Toronto, CMA**



Source: Statistics Canada, Labour Force Survey, Public Use Microdata Files Collection

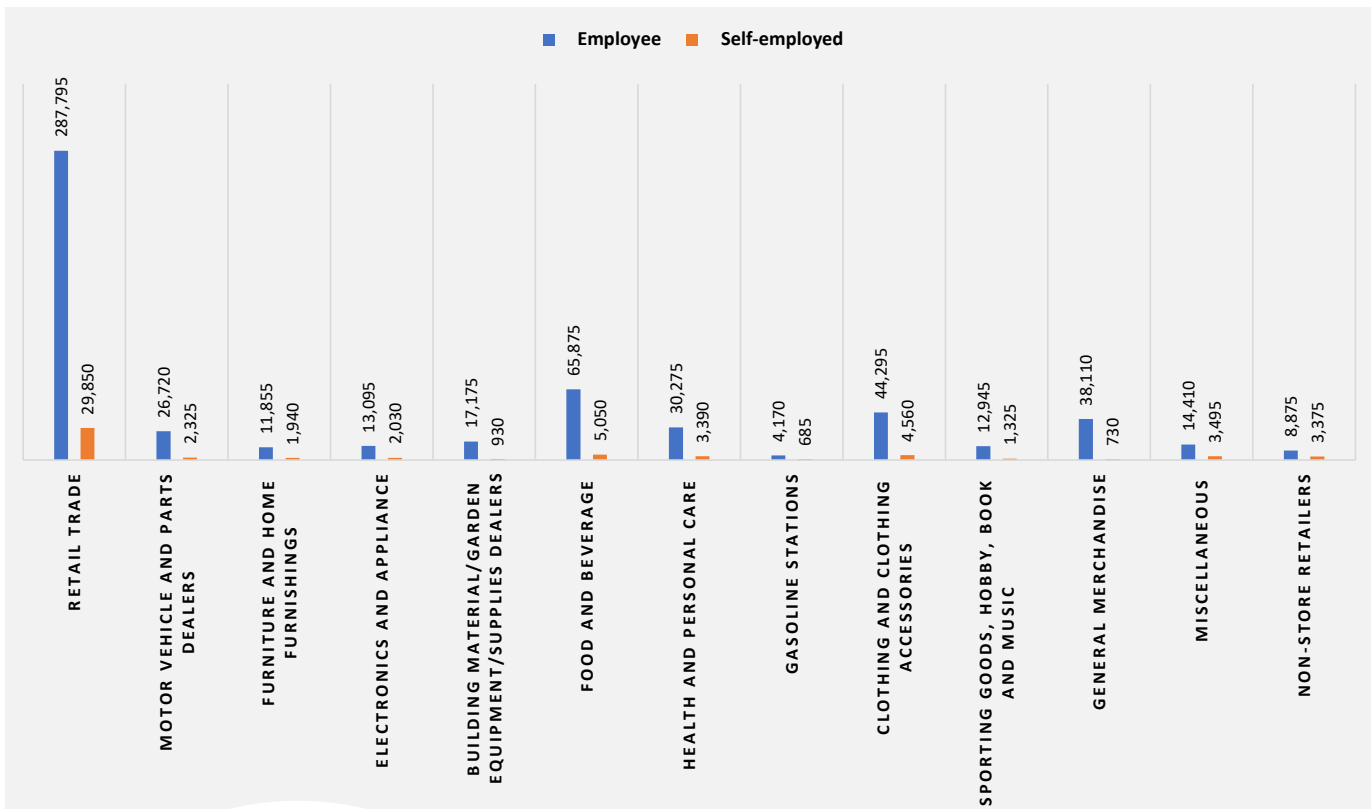


According to the Toronto Employment Survey (2017)<sup>14</sup>, the City of Toronto experienced a net gain of 57,550 (3.9 per cent) jobs in 2017, bringing the total number of jobs in the city to 1,518,560. Retail employment grew at a rate of 3.2 per cent jobs in 2017, which is a markedly higher pace than the average annual job growth of 1.2 per cent since 2012. Based on the significance of retail trade in the city, this growth is still considered to be moderate. Factors that may have contributed to this trend of slower retail job growth include the predominance of online shopping and automation technology, as well as the general shift of retailing from smaller and dispersed locations into fewer ones. However, according to Census 2016, employed Toronto residents worked across a wide variety of industries in 2016 and retail trade (9.7 per cent) had the third most share of employment<sup>15</sup>. This share increased to 11.3 per cent in 2017.



Using Census 2016 data, Figure 5 illustrates the total class of workers associated with the different sub-sectors of retail trade. Total Class of worker refers to whether a person aged 15 years and over is an employee or is self-employed<sup>16</sup>.

**Figure 5: Total Class of Workers by Sub-Sectors in Retail Trade, Toronto CMA**



Source: Statistics Canada, Census 2016, Customized Table

Census 2016 data suggested that the top three sub-sectors in retail trade with the greatest number of employees were:

- Food and beverage stores
- Clothing and clothing accessories stores
- General merchandise stores

Given that Food and beverage stores and Clothing and clothing accessories stores have the greatest number of businesses in Toronto, it is only logical to derive such findings. However, although Health and personal care stores ranked as third in terms of the number of businesses, it fell behind General merchandise stores in terms of employment. 9.4% of the total class of workers in retail trade were self-employed.

# Demographics: Gender and Age

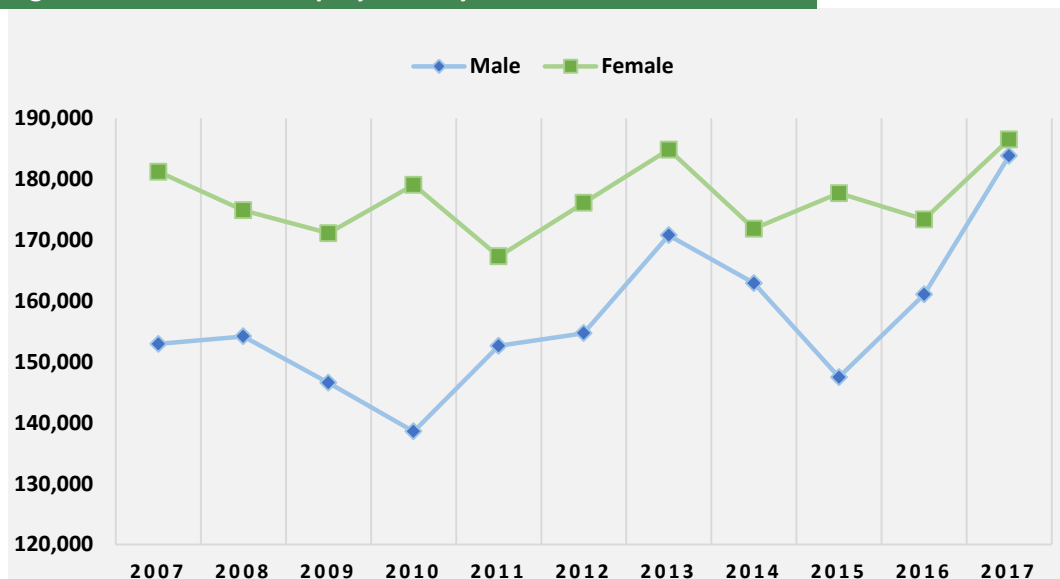


According to the Labour Force Survey, the gender breakdown in retail trade in 2017 was as follows:

- women employed: 186,492 people or 50.3 per cent
- men employed: 183,815 people or 49.7 per cent

Figure 6 presents trend in retail trade employment in Toronto, CMA by gender. It appears that while employment in retail trade traditionally comprised of mostly female, this is changing overtime with more and more male employees entering into the retail workforce. According to the LFS in the year 2017, men (49.7 per cent) and women (50.3 per cent) comprised of almost equal share of the retail workforce. Given the lenient criterion to enter the retail workforce in terms of skills and educational requirement, it is unsurprising that a greater number of both genders are associated with employment in this sector. Analysis presented by Figure 6 also supports census data findings<sup>17</sup> that suggest that retail is the first most common occupation among females and second most common occupation among male in the country.

**Figure 6: Retail Trade Employment by Gender in Toronto, CMA**



Source: Statistics Canada, Labour Force Survey, Public Use Microdata Files Collection

Table 3 below reports employment for all industries versus retail trade by different age categories 15-24 years (youth employees); 25-49 years (prime working age) and 50+ years (mature workers). Retail trade employment in Toronto, CMA mostly comprises of employees of the age category 25-49 years.

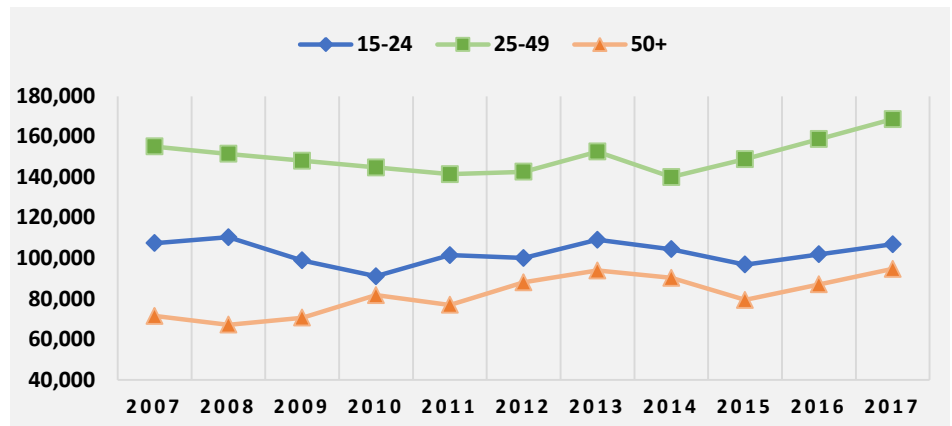
**Table 3: Employment in Retail Trade by Age Category in Toronto, CMA, 2017**

Age Characteristics	Employment in Toronto, CMA		Employment in Retail Trade	
	Number	Percentage	Number	Percentage
15-24	414,700	12.6%	106,924	28.9%
25-49	2,199,600	66.9%	168,668	45.5%
50+	675,300	20.5%	94,716	25.6%

Source: Statistics Canada, Labour Force Survey, Public Use Microdata Files Collection

Although the age-category 25-49 years comprised of the majority of retail employment in Toronto, LFS data analysis using Statistics Canada public use micro files suggested that the number of mature workers (50+ years) in retail trade have been persistently increasing over time. In 2007, the share of mature workers to the total retail employment was 21 per cent in Toronto whereas, in 2017, this portion increased to 26 per cent.

**Figure 7: Retail Trade Employment by Age Category in Toronto, CMA**



Source: Statistics Canada, Labour Force Survey, Public Use Microdata Files Collection

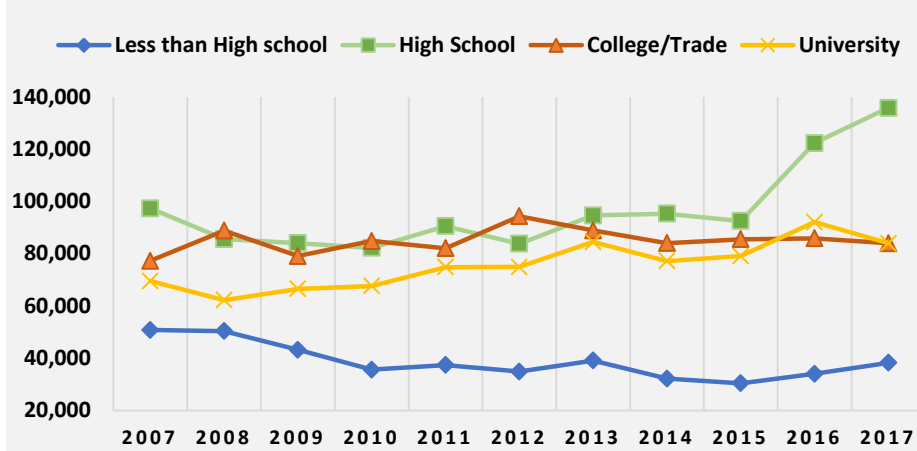
The participation rates of baby boomers would be expected to drop as a natural consequence of aging but the fact that more older people have entered the retail work force compared to the past is perhaps the outcome of an increasing trend towards a gig economy leading to more temporary positions and less pensions.



# Educational Requirements of Retail Trade Employees

Trends illustrated by Figure 8 suggest that employees in retail trade mostly had a high school degree or a college/trade diploma. However, in the past two years there have been a significant increase in number of retail employees with high school degrees only. This further validates that the retail workforce has a relatively low level of formal qualifications, compared with an all industries average. Given the composition of age and educational qualifications of the retail workforce it also indicates that many workers are perhaps at the same time undertaking secondary schooling or university degree or their first post-school qualification.

**Figure 8: Employment in Retail Trade by Level of Education in Toronto, CMA**

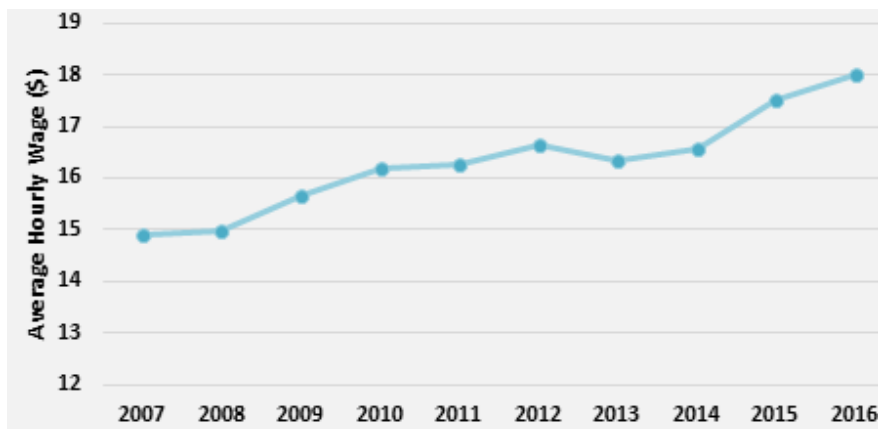


Source: Statistics Canada, Labour Force Survey, Public Use Microdata Files Collection

# Average Hourly Wage

The wage estimates are calculated and analyzed with data collected from Statistics Canada’s Labour Force Survey. Figure 9 below indicates that there has been a fairly consistent upward trend in the wages in retail trade in Toronto, CMA. Over the past decade, there has been a moderate average hourly wage rate gain of 20 per cent.

**Figure 9: Average Hourly Wage in Retail Trade, Toronto CMA**



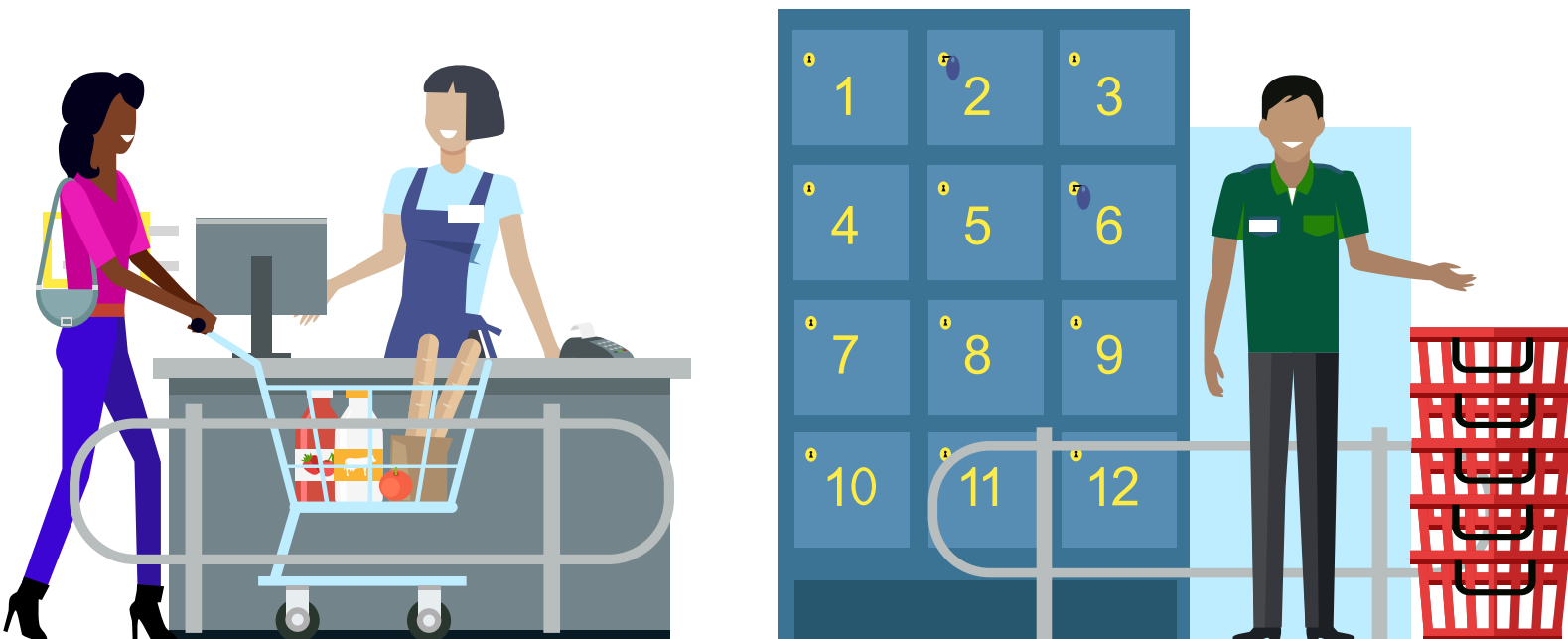
Source: Statistics Canada, Labour Force Survey, Public Use Microdata Files Collection

Despite this, many retail employees believe the current wage does not provide most of the minimum wage-earning retail employees with a living wage, especially in larger cities like Toronto with soaring costs. On November 21, 2018, the Ontario Provincial Government passed Bill 47, Making Ontario Open for Business Act, 2018 keeping the minimum wage at \$14 on January 1, 2019 as well, keeping the minimum wage at this level until 2020.

## Occupations in Retail Trade

Some of the key occupations in retail trade that make up the large majority (about two thirds) of the retail workforce<sup>18</sup> are:

- Retail salespersons and sales clerks (NOC 6421)
- Retail trade managers (NOC 0621)
- Cashiers (NOC 6611)
- Grocery clerks and store shelf stockers (NOC 6622)
- Retail trade supervisors (NOC 6211)



**Table 4: Income Statistics in Toronto, CMA by Different Occupations in Retail Trade**

<b>Occupation - National Occupational Classification (NOC) 2016</b>	<b>Average Annual Employment Income (\$)</b>
All occupations	54,782
Middle management (retail/wholesale trade/customer services)	64,829
Corporate sales managers	112,478
Retail and wholesale trade managers	63,197
Managers in food service and accommodation	41,532
Managers in customer and personal services, n.e.c.	37,240
Sales and service occupations	29,993
Retail sales supervisors and specialized sales occupations	63,447
Retail sales supervisors	38,047
Technical sales specialists (wholesale/retail/wholesale buyers)	78,729
Service supervisors and specialized service	25,875
Service supervisors	36,952
Chefs and cooks	23,450
Butchers and bakers	25,175
Specialized occupations in personal and customer services	23,576
Sales representatives and salespersons – (Wholesale/retail trade)	30,495
Retail salespersons	23,715
Service representatives and other customer and personal services	27,165
Occupations in food and beverage service	14,322
Security guards and related security service occupations	27,556
Customer and information services representatives	36,065
Other occupations in personal service	18,283
Sales support occupations	15,500
Cashiers	12,497
Other sales support and related occupations	19,918
Service support and other service occupations, n.e.c.	21,865
Food counter attendants, kitchen helpers, and related support occupations	14,449
Other service support and related occupations, n.e.c.	22,355

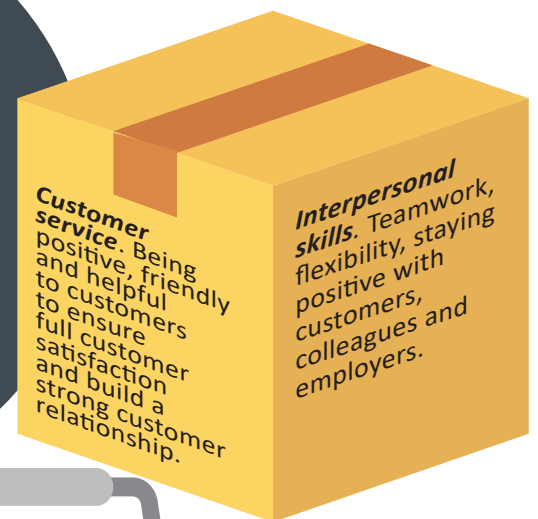
Source: Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016304

Table 4 reports the average employment income<sup>19</sup> in retail trade as per Census 2016. The top 5 highest paid occupations in retail trade are:

- **Corporate sales managers**
- **Technical sales specialists (wholesale/retail/wholesale buyers)**
- **Middle management (retail/wholesale trade/customer services)**
- **Retail sales supervisors and specialized sales occupations**
- **Retail and wholesale trade managers**

## Job Skills Essential in Retail Trade

A successful retail position demands both hard and soft skills. An article by BalanceCareers<sup>20</sup> 2018 reported essential skills for various retail jobs.





# Retail Trade

## Locational Survey:

### A Snapshot of Retailers at Yorkdale Shopping Centre

To gain a better understanding of issues facing Toronto's retail sector, one quantitative component of this research initiative involved conducting group administered surveys with retailers of various retail sub-sectors in Yorkdale shopping centre at a full day structured forum/participatory session. Toronto Employment and Social Services (TESS) in partnership with Oxford Properties, Yorkdale supported this research project by bringing together 20 retail employers from Yorkdale shopping centre who participated in the survey allowing Toronto Workforce Innovation Group (TWIG) to collect the required data for the study.

A purposive sampling strategy was employed to select retail trade sector employers to participate in the survey. The purposive sample sought maximum variation in industry group and employer size. This sampling strategy was selected to allow us to identify patterns that emerge despite differences across settings. Although the intent was to collect in-depth information that reflects the varied contexts and perspectives

offered by the different employers, given that retail trade sector is so diversified the survey findings of 20 retailers for one retail location would only give a snapshot of employers' view located in the Yorkdale shopping centre<sup>21</sup>.

Yorkdale shopping centre on any given Saturday is a small city. According to a 2017 report by the Retail Council of Canada<sup>22</sup>; as of June 30th, 2017, Yorkdale shopping centre had a sales per square feet of \$1,653 per annum and continue to thrive as one of Canada's top shopping centers. According to the same report, for the second year in a row, Toronto's Yorkdale shopping centre ranked as the country's top mall in terms of annual sales per square foot. It has an annual pedestrian count of 18,000,000. Yorkdale shopping centre is also taking the lead in Canada for new concepts and new entrants<sup>23</sup>.

The surveys were conducted with the staff member(s) in the Yorkdale shopping centre that have the primary responsibility for hiring new employees.



#### Topics addressed in the survey include:

- Company background
- Recruitment practices
- Training requirements
- Recruitment and Retention Challenges
- Essential skills for in-store retail positions
- Working conditions
- Wage, commission, and benefit structure
- The typical career path in retail



The following summarizes the characteristics of the firms chosen to be sampled from the Yorkdale shopping centre:

Retail sub-sectors who participated<sup>24</sup> were: Building material and garden equipment supplies, Clothing and clothing accessories, General merchandise stores/department stores, Electronics and appliance, Food and beverage, Health and personal care, Miscellaneous store retailers. The list covered the top 4 dominant retail sub-sectors in the city<sup>25</sup>.

Firm Size: Those sub-sectors that participated were either small-sized firm (1-19 employees) or medium-sized firm (20-99 employees) or large-sized firm (100+ employees).

The intent of this survey was to collect in-depth information that reflects the contexts and perspectives of different employers in the retail trade sector. Survey findings are analyzed as follows:

### Gender, Age and Employment Status

55% of those surveyed reported an equal share of both male and female employees in their store. This finding supports the trend in LFS data discussed using figure 6. 34% of retailers surveyed have a higher share of female over male employees while only 9% have a higher share of male employees. Except for two respondents, all retailers reported that most of their staff member fell in the age category 15-29 years. 73% of the participants reported that the majority of the staff in their store were a part-time employee while the rest (27%) of the participants reported that the employees in their store were mainly full-time. The latter two findings were different than findings under LFS.

### Minimum Educational Requirement for Different Positions in Retail Stores

Participants were asked what were the minimum educational requirement by different levels of positions: Entry Level<sup>26</sup>, Mid-Level/Supervisory<sup>27</sup> and Senior-level/Store Management<sup>28</sup>. 64% of the stores participating in the survey identified high school completion as the minimum educational requirement to get into entry-level positions in the store. This aligns with the LFS data. The remaining survey

**64%**  
of stores surveyed  
identified high school completion  
as the minimum educational  
requirement to get into entry-level  
positions

participants reported less than high school as the minimum educational requirement for all entry-level positions in their store. An equal share of participants reported both high school and college/diploma/apprenticeship/trade certificate as the minimum credentials needed to work as a mid-level supervisor in their store. For senior-level/in-store management positions, 58% of the respondents identified college/diploma/apprenticeship/trade certificate and university/colleges as the minimum education requirement whereas 42% reported high-school completion as the minimum educational criteria.

Such responses indicate that minimum educational requirement for in-store retail positions does not necessarily increase with the levels of positions. Given that each sub-sector in retail is so unique, the minimum educational requirement is dependent upon the nature of that sub-sector<sup>29</sup>.

### Retailers Identify the Essential Skills for Different Positions in Stores

Participants primarily responsible for hiring were also asked about the top three skills essential to succeed in the three different levels of positions in retail trade. Good communications skills, outstanding customer service, and time-management were found to be the most desired set of skills for all types of position in a retail store.

Apart from these three commonly reported skills, other than the top skills that were recognized as essential for different positions in retail stores were:

- **Entry-level positions:** a sense of urgency, adaptability, multi-tasking, professionalism, eagerness to learn, motivated, committed, good at cash handling.
- **Mid-Level/ Supervisory positions:** leadership/ability to delegate effectively, problem-solving skills, strong work ethics, motivated and loyal.
- **Senior-level/In-store Management positions:** leadership, strategic thinking, ability to work under pressure, ability to assess risk, problem-solving attitude, past management experience.

### Recruitment Practices

Employers participating in the survey were also asked what were the most frequently used method to fill the company vacancies. The list included options like: walk-ins, Yorkdale shopping centre website, job-fairs, word of mouth/family or friends of current co-workers, employment search engines like Indeed, Workopolis etc., social media platforms, temp agencies, City of Toronto, Toronto Employment and Social Services/other Employment Ontario networks.

The top three most widely used recruitment methods identified by the respondents were:

- **Job fairs**

- **Employment Search Engines (e.g. Indeed, LinkedIn etc.)**
- **Walk-Ins**

Participants mentioned that employment search engines and job-fairs are time efficient and allow them to screen out job-candidates from a larger platform of job-seekers. Walk-Ins also allow them to immediately get a good gage of how candidates present themselves and interact with people.

### Training Offered

Every participant reported that upon recruitment, they offer in-store training for all levels of positions. Clearly, due to the diverse nature of retail trade, training duration reported varies by different sub-sectors of retail trade and by different levels of positions. Training for entry-level positions ranged from 10 hours to 8 weeks. For supervisory and management positions, it ranged between 1-4 weeks.

### Recruitment Challenges

Most participants reported multiple challenges encountered while recruiting a new worker<sup>30</sup>.

**31%** reported lack of product knowledge  
a key recruitment challenge

- **23 per cent felt there was a budget constraint to volume recruitment.**
- **23 per cent also considered inflexible work hours of potential candidates as a recruitment challenge.**
- **15 per cent of the participants reported a lack of required technical/technological skills as a recruitment challenge.**
- **Some other 15 per cent of the responses suggested difficulty in competing for talent at the senior management level.**

### Retention Challenges

Participants also identified the following as a challenge to retain employees:

- **Inflexible workers (students going back to school) and compensation issues (minimum wages and no/poor benefit packages posing a challenge to attract highly qualified individuals).**

### The Typical Career Path in Retail Stores

Most participants had a similar description about a typical career path for a staff in their store. Employees that stay and grow with the company typically starts as a sales associate. They move up the ladder to the mid-level positions like sales supervisor eventually becoming an assistant manager or a store manager. Respondents also reported that on many occasions, staff with leadership ability would move into corporate offices within the corporation.

### Wages, Commissions, Bonuses, and Working Conditions

Participants were also asked about wage range, commission, increment options and benefit packages for different levels of positions. The hourly wage rate for entry-level positions in the store hovered around \$14-\$15. The wage/salary range of mid-level positions varied from as low as \$16/hour to as high as \$45k per annum. Salaries

reported for senior-level positions ranged from as low as \$30k-\$40k per annum to as high as \$60k-\$85k per annum. While some stores offered commissions/bonuses for all levels of positions, some others didn't. Heavy lifting, ladder climbing and standing for long hours were reported as the major health and safety issues for staffs in store.

### Source of Labour Supply

Some of the employee characteristics that retail employers would accept for at least entry level work in the sector are individuals who have less than a high school education and limited Canadian work experience but are willing to work and commit to an employer. Since the average educational level required in retail trade is less than the average of all other industries, it makes sense to develop strategies to move potential job seekers with these characteristics into the industry's workforce. Findings generated from the Vicinity Job Networks data<sup>31</sup>, showed that between January and June 2017, 20 per cent of these job seekers indicated a preference for work in retail/customer service, making them a good fit for the sector. The difficulty lies in developing strong connections between these job seekers, the agencies that work with them and employers in this sector, in other words, developing a logical, sustainable and inclusive workforce development plan.



# Latest Trends in Retail Trade

## Effect of Automation on Retail Trade

According to a C.D.Howe Institute report by Oschinski and Wyonch (2017)<sup>32</sup> industries with relatively higher shares of routine occupations are likely to be more negatively affected by automation than industries with relatively low shares. Findings from this report suggested that retail trade, the second largest industry in Canada based on the total number of employees, has a share of vulnerable employment (employment that are likely to be automated) of around 50 per cent.

Critical analysis on the effect of automation on retail trade were also done by MaRS Discovery District with the support of Google.org. MaRS created the Employment Pathways Platform, a skills-based career guidance tool for the Canadian workforce<sup>33</sup>. This pathways approach defines how workers can make informed decisions about education and training in the context of automation and successfully transition between jobs. According to the analysis conducted by MaRS<sup>34</sup> retail salespersons, has an automation risk of 38 per cent. Census 2016 data reports that this occupation has the highest level of employment among working age Ontarians, with 133,790 workers. The Employment Pathways Platform model predicts 23,445 retail salespersons will be impacted by automation over the next five years and that this number will climb to 51,401 after 15 years.

## Fastest Growing Occupations in Retail Trade and other Career Transitions

According to a 2018 study by LinkedIn<sup>35</sup> the number of people identifying as retail associates on their LinkedIn profiles has declined by 41.4 per cent between 2013 to 2017. Given the evolving nature of retail trade sector, this study examined whether or not the skills need of the retail employers were changing<sup>36</sup>.

The analysis was done based on LinkedIn data. Findings revealed that although sales still make up 29 per cent of the workforce in retail, the proportion of salespeople employed is shrinking. It has fallen from 33 per cent of all retail jobs in 2013 down to 29 per cent in 2017. At the same time, engineering and IT grew from 7 per cent to 9 per cent of employees in retail. Other popular roles that retail sales associates move into are:

- **Administrative Employee**
- **Customer Service Specialist**
- **Back to School**
- **Food Service Professional**
- **Operations Specialist**
- **Logistics Specialist**
- **Marketing Specialist**
- **Merchandiser**
- **Information Technology Support**
- **Corporate Trainer**

As more and more retailers are going digital, there is an increase in demand for the technical support needed behind the scene. In spite of the decline in the proportion of sales positions, other job functions in the sector showed promising growth. In 2017, software developers became the third most common job title in the retail sector compared to its eight positions in 2013. Tech skills that

are popular and increasingly demanded from software developers in retail revolve around the web and user experience.

Analysis were conducted by different extent of skills required<sup>37</sup> - popularity, fastest growing, and uniqueness. The programming language, Java was the most popular skill among software developer in retail. Another fastest-growing skill for software developers in the sector is React.js, a JavaScript library that's used for building user interfaces. A unique skill identified to function as a software developer is the warehouse management system (WMS) implementation and supply chain optimization.

## Tech positions are on the rise.

The latest study by Glassdoor Inc also found that retail trade sector saw the biggest spike in the share of software jobs from 6.4 percent in 2012 to 13.9 percent in 2017.

According to the latest Forbes article<sup>38</sup> big brand names like Nordstrom, The Home Depot are investing more and more into digital integration. In January 2018 alone, Nordstrom career site posted openings for nearly 30 tech positions like data engineers, software engineers, and omnichannel inventory managers. The Home Depot operates a web page to appeal technology candidates. This web page features career opportunities in seven areas including mobile, data analytics, online merchandising and user experience.

The increasingly emerging trend of e-commerce in retail trade has led to a rise in tech skills requirements by retailers.





## The retail renaissance.

Today's retail environment is one where people can see themselves creating a long-term career path, all in part due to the advances in technology and the changing landscape that is the retail trade sector. Innovation coupled with strategic thinking has made retail an even more attractive career path for many youth concerned with community building<sup>42</sup>.

While sales associate roles are the backbone of the traditional brick and mortar stores, in this era of online shopping potential retail trade job seekers could consider developing their tech skills to make them more marketable in the retail trade sector.

For those who are not well equipped with a technology background, e-commerce has enabled other opportunities too. For example, employees in Walmart<sup>39</sup> will find themselves fetching and assembling online orders for curbside pickup. At the recently opened Amazon Go store, employees will be engaged in helping shoppers troubleshoot technical problems. At Best Buy, workers are tasked to visit customers at their homes to offer smart-home consultations.

In the latest globe and mail article<sup>40</sup> Patricia Heath, vice-president of retail excellence, Samsung Electronics Canada said that analytics is a top hard skill they would look for from anyone pursuing a career in retail today.

Using the Employment Pathway Platform, the MaRS Discovery District<sup>41</sup> demonstrated three other possible career pathways for retail sales person:

1. **pre-school teachers;**
2. **meeting, convention and event planners; and**
3. **real estate sales agents.**

The occupational information network used for analysis provided evidence of their commonalities with retail sales jobs. The common interpersonal elements like speaking, active listening and coordination between retail salespersons and the three target jobs makes the transition between these roles feasible. Transitions are reasonably viable as preschool teachers, meeting, convention and event planners, and real estate sales agents have automation risk ratings of 9 per cent, 6 per cent, and 23 per cent, respectively. These risks are substantially lower than the 38 per cent assigned to retail salespersons.



# Concluding Remarks

Retail trade is one of Canada's largest sectors generating a significant portion of the country's Gross Domestic Product (GDP). Over time, the sector is being transformed by a range of forces – changing demographics, customer preferences, globalisation and new types of competition and most importantly a critical impact brought by automation and omni-channel retailing.

This report presents an in-depth quantitative analysis on the sector and its workforce in Toronto and outlines related research studies that examined the changing face of retail trade locally and globally and in Canada. It features how this sector undergoing moderate transition is also creating new and diversified career opportunities and more demand for higher skills and training. Recently, the Trillium Automobile Dealers Association has launched a Career Start Education Program called the Women in Automotive Mentoring Program<sup>43</sup>. This one-year pilot project aims to connect post-secondary students with automotive industry leaders to develop their skills that can lead to lifelong careers in the evolving retail auto industry.

It is that staff turnover in retail is higher than average, as workers leave the industry for other jobs once they have completed their study, or seek work in other industries that are considered as more attractive. The perceived negative and drab image of careers in retail – characterized as inflexible work schedules, long hours, low pay and benefit and little opportunity for progression – could be addressed by showcasing to the

potential recruits the dynamics of the changing face of retail.

There is a growing recognition within the industry that coordinated action and leadership is needed to address these challenges. In an environment where there is a wave of automation sweeping retailers globally and in Canada, retail trade employees at the management level need to obtain new and up-to-date skills in developing innovative business models and high-end Information and Communications Technology (ICT) solutions. Technology, after all, cannot spell the end of all retail jobs. Certain skills like problem solving, intuition, creativity and persuasion cannot be replaced. But the challenge lies in the availability of resources to train these staff, especially for small and medium sized firms.

Employment service providers and career advisors could take insights from this report to identify based on existing research, the new opportunities arising due to this changing face of retail, as well as put in more efforts to raise the profile of roles, such as management, marketing, and e-commerce.

**Toronto Workforce Innovation Group encourages ongoing research on retail trade to get a better understanding of the nature of emerging and converging jobs, and the education and training pathways for retail workers.**

## Appendix A

### No. of Establishment Locations in the City of Toronto by the North American Industry Classification System (NAICS), December 2017

NAICS	Total	No. employee	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
<b>Total</b>	<b>332,158</b>	<b>238,662</b>	<b>93,496</b>	<b>54,878</b>	<b>15,382</b>	<b>10,436</b>	<b>7,423</b>	<b>2,763</b>	<b>1,358</b>	<b>831</b>	<b>425</b>
44-45 -Retail trade	19,200	9,427	9,773	4,328	2,359	1,610	902	358	141	71	4
441-Motor Vehicles and Parts Dealers	1,133	644	489	254	78	46	57	39	11	4	0
441110 -New car dealers	178	66	112	10	4	5	41	37	11	4	0
441120-Used car dealers	572	383	189	154	21	10	4	0	0	0	0
441210-Recreational vehicle dealers	5	3	2	0	2	0	0	0	0	0	0
441220-Motorcycle, boat, and other motor vehicle dealers	55	32	23	13	3	4	2	1	0	0	0
441310 -Automotive parts and accessories stores	239	123	116	62	30	16	7	1	0	0	0
441320 -Tire dealers	84	37	47	15	18	11	3	0	0	0	0
442-Furniture and Home Furnishings Stores	1,030	443	587	286	150	73	64	4	4	6	0
442110 -Furniture stores	444	170	274	129	78	29	31	2	2	3	0

NAICS	Total	No. employee	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
442210 - Floor covering stores	128	63	65	37	20	7	1	0	0	0	0
442291 -Window treatment stores	62	32	30	20	5	4	1	0	0	0	0
442292 -Print and picture frame stores	76	36	40	32	4	3	0	0	1	0	0
442298 -All other home furnishings stores	320	142	178	68	43	30	31	2	1	3	0
443-Elec-tronics and Appliances Stores	788	357	431	246	111	32	23	17	2	0	0
443143 - Appliance, television and other electronics stores	408	156	252	129	82	20	9	10	2	0	0
443144 - Computer and software stores	288	147	141	97	18	10	10	6	0	0	0
443145 - Camera and photographic supplies stores	25	12	13	7	2	1	2	1	0	0	0
443146 -Audio and video recordings stores	67	42	25	13	9	1	2	0	0	0	0
444-Build-ing material and garden equipment and supplies dealers	563	261	302	116	87	46	24	13	11	5	0

NAICS	Total	No. employee	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
444110 -Home centres	57	12	45	5	6	4	6	8	11	5	0
444120 - Paint and wallpaper stores	129	77	52	21	26	5	0	0	0	0	0
444130 - Hardware stores	92	36	56	16	18	11	10	1	0	0	0
444190 - Other building material dealers	202	99	103	55	23	20	5	0	0	0	0
444210 -Outdoor power equipment stores	8	2	6	5	0	0	0	1	0	0	0
444220 -Nursery stores and garden centres	75	35	40	14	14	6	3	3	0	0	0
445-Food and Beverage Stores	3,483	1,577	1,906	866	354	354	154	85	68	24	1
445110 -Supermarkets and other grocery (except convenience) stores	848	305	543	159	79	68	70	76	66	24	1
445120 - Convenience stores	1,375	838	537	462	42	26	7	0	0	0	0
445210 -Meat markets	197	62	135	45	33	44	12	1	0	0	0
445220 -Fish and seafood markets	49	22	27	7	9	6	4	1	0	0	0

NAICS	Total	No. employee	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
445230 -Fruit and vegetable markets	107	52	55	35	14	4	0	2	0	0	0
445291 - Baked goods stores	206	83	123	53	33	17	19	0	1	0	0
445292 - Confectionery and nut stores	69	22	47	7	28	11	1	0	0	0	0
445299 -All other specialty food stores	418	184	234	96	59	56	18	4	1	0	0
445310 - Beer, wine and liquor stores	214	9	205	2	57	122	23	1	0	0	0
446-Health and Personal Care Stores	2,877	1,168	1,709	751	493	222	167	68	7	1	0
446110 - Pharmacies and drug stores	1,150	326	824	289	227	124	123	58	3	0	0
446120 -Cosmetics, beauty supplies and perfume stores	412	193	219	73	71	45	18	9	2	1	0
446130 - Optical goods stores	374	110	264	145	94	18	6	1	0	0	0
446191 - Food (health) supplement stores	342	151	191	101	52	22	15	0	1	0	0
446199 - All other health and personal care stores	599	388	211	143	49	13	5	0	1	0	0

NAICS	Total	No. employee	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
447-Gasoline Stations	608	360	248	63	110	48	22	4	1	0	0
447110 - Gasoline stations with convenience stores	216	71	145	26	81	27	6	4	1	0	0
447190 - Other gasoline stations	392	289	103	37	29	21	16	0	0	0	0
448- Clothing and Clothing Accessories Stores	3,292	1,222	2,070	703	537	461	279	78	7	4	1
448110 - Men's clothing stores	184	58	126	44	34	34	9	5	0	0	0
448120 - Women's clothing stores	651	198	453	138	132	125	51	5	2	0	0
448130 - Children's and infants' clothing stores	153	66	87	30	17	28	12	0	0	0	0
448140 - Family clothing stores	525	148	377	65	60	83	108	56	1	4	0
448150 - Clothing accessories stores	227	106	121	61	37	12	11	0	0	0	0
448191 - Fur stores	11	8	3	3	0	0	0	0	0	0	0
448199 - All other clothing stores	431	215	216	88	61	41	18	5	2	0	1
448210 - Shoe stores	397	68	329	79	110	83	51	6	0	0	0
448310 - Jewellery stores	656	334	322	185	65	53	16	1	2	0	0

NAICS	Total	No. employee	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
448320 - Luggage and leather goods stores	57	21	36	10	21	2	3	0	0	0	0
451- Sporting Goods, Hobby, Book and Music Stores	755	361	394	142	115	75	37	16	9	0	0
451111 - Golf equipment and supplies specialty stores	17	10	7	4	0	0	2	1	0	0	0
451112 - Ski equipment and supplies specialty stores	7	2	5	1	0	2	1	1	0	0	0
451113 - Cycling equipment and supplies specialty stores	53	20	33	8	10	11	4	0	0	0	0
451119 - All other sporting goods stores	147	51	96	33	23	21	9	5	5	0	0
451120 - Hobby, toy and game stores	150	56	94	20	43	13	13	5	0	0	0
451130 - Sewing, needlework and piece goods stores	114	72	42	19	12	7	4	0	0	0	0
451140 - Musical instrument and supplies stores	100	75	25	15	2	5	2	1	0	0	0



NAICS	Total	No. employee	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
451310 - Bookstores and news dealers	167	75	92	42	25	16	2	3	4	0	0
452- General Merchandise Stores	826	399	427	208	49	108	12	10	16	22	2
452110 - Department stores	26	0	26	0	0	0	0	3	7	16	0
452910 - Warehouse clubs	7	3	4	0	0	0	0	1	0	2	1
452991 - Home and auto supplies stores	21	0	21	0	0	0	6	4	8	3	0
452999 - All other miscellaneous general merchandise stores	772	396	376	208	49	108	6	2	1	1	1
453-Miscellaneous Store Retailers	2,116	1,261	855	476	226	93	46	13	1	0	0
453110 - Florists	305	174	131	91	32	6	2	0	0	0	0
453210 - Office supplies and stationery stores	85	45	40	17	6	2	15	0	0	0	0
453220 - Gift, novelty and souvenir stores	353	189	164	94	54	10	5	1	0	0	0
453310 - Used merchandise stores	177	90	87	32	17	21	7	10	0	0	0
453910 - Pet and pet supplies stores	138	52	86	25	41	14	5	1	0	0	0
453920 - Art dealers	205	145	60	47	12	0	1	0	0	0	0

NAICS	Total	No. employee	Total, with employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
453930 - Mobile home dealers	6	4	2	2	0	0	0	0	0	0	0
453992 - Beer and wine-making supplies stores	32	14	18	15	2	1	0	0	0	0	0
453999 - All other miscellaneous store retailers (except beer and wine-making supplies stores)	815	548	267	153	62	39	11	1	1	0	0
454-Non-Store Retailers	1,729	1,374	355	217	49	52	17	11	4	5	0
454110 - Electronic shopping and mail-order houses	736	518	218	120	31	40	13	8	2	4	0
454210 - Vending machine operators	68	57	11	5	2	1	1	1	1	0	0
454311 - Heating oil dealers	5	3	2	1	1	0	0	0	0	0	0
454312 - Liquefied petroleum gas (bottled gas) dealers	5	3	2	1	1	0	0	0	0	0	0
454319 - Other fuel dealers	9	4	5	3	1	0	1	0	0	0	0
454390 - Other direct selling establishments	906	789	117	87	13	11	2	2	1	1	0

## Endnotes

- 1 Statistics Canada. Table 36-10-0434-03 Gross domestic product (GDP) at basic prices, by industry, annual average (x 1,000,000)
- 2 Retail Insider. Web: <https://www.retail-insider.com/retail-insider/2018/1/2018-canadian-retail-forecast-analysis>
- 3 PwC Canada. Web: [https://www.pwc.com/ca/en/industries/retail-consumer/2018-holiday-outlook-canadian-insights.html?sem-paidadwords&gclid=EAlalQobChMIuqOA7JT13glVU7nACh1g4wGNEAAYASAAEgINtPD\\_BwE](https://www.pwc.com/ca/en/industries/retail-consumer/2018-holiday-outlook-canadian-insights.html?sem-paidadwords&gclid=EAlalQobChMIuqOA7JT13glVU7nACh1g4wGNEAAYASAAEgINtPD_BwE)
- 4 Retail Council of Canada, 2018. Web: <https://www.retailcouncil.org/research/retail-fast-facts/> September 2018.
- 5 City of Toronto. Toronto Employment Survey 2017. Web: <https://www.toronto.ca/wp-content/uploads/2018/03/95b8-Toronto-Employment-Survey-2017-Bulletin.pdf>
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- 8 Toronto Economic Bulletin Open Data
- 9 Retail Council of Canada, 2018. Web: <https://www.retailcouncil.org/research/retail-fast-facts/>
- 10 In this report, firms operating with 1-4 employees are defined as micro-sized firms, those operating with 5-19 employees are small-sized firms, 20-99 are medium sized and 100+ employee firms are considered as large-sized firms.
- 11 CBC News. Web: <https://www.cbc.ca/news/business/retail-sales-december-1.4546609>
- 12 Statistics Canada, The Daily. Web: <https://www150.statcan.gc.ca/n1/daily-quotidien/180921/dq180921b-eng.htm>
- 13 Statistics Canada, Table: 14-10-0098-01 (formerly CANSIM 282-0131)
- 14 City of Toronto. Toronto Employment Survey 2017. Web: Toronto Employment Survey 2017
- 15 City of Toronto. 2016 Census Backgrounder. Web: <https://www.toronto.ca/wp-content/uploads/2017/12/94ce-2016-Census-Backgrounder-Education-Labour-Journey-to-work-Language-Mobility-Migration.pdf>
- 16 Self Employed Includes persons aged 15 years and over with or without an incorporated business with paid help or without paid help, as well as unpaid family workers.
- 17 Statistics Canada. Labour in Canada: Key results from the 2016 Census. Web: <https://www150.statcan.gc.ca/n1/daily-quotidien/171129/dq171129b-eng.htm>
- 18 Employment and Social Development Canada. Web: [http://www.edsc-esdc.gc.ca/img/edsc-esdc/jobbank/SectoralProfiles/ON/20152017SectProf\\_ON\\_Retail\\_EN.pdf](http://www.edsc-esdc.gc.ca/img/edsc-esdc/jobbank/SectoralProfiles/ON/20152017SectProf_ON_Retail_EN.pdf)
- 19 According to the Statistics Canada, Employment Income is defined as all income received as wages, salaries and commissions from paid employment and net self-employment income from farm or non-farm unincorporated business and/or professional practice during the reference period. The average income of a specified group is calculated by dividing the aggregate income of that group by the number of units in that group. Average incomes of individuals are calculated for those with income (positive or negative).
- 20 The Balance Careers. Web: <https://www.thebalancecareers.com/list-of-retail-skills-2062476>
- 21 This survey is locational and gives a snapshot of retailers in general but does not claim to be a representative of all retailers in general.
- 22 Retail Council of Canada. Web: <https://www.retailcouncil.org/research/2017-canadian-shopping-centre-study/>
- 23 According to a 2017 Retail Council Canada report, Yorkdale will be the country's first locations for brands including technology brand Dyson, UK-based Hunter Boots, French fashion brand Zadig & Voltaire, and the very first retail location for Montréal-based fashion brand Moose Knuckles
- 24 It seems that while employers in this sector see value in sharing their thoughts and experiences about recruitment and retention, participating in interviews is a low priority. A number of employers responded positively to initial survey requests but were unable to complete the full survey questionnaire.

- 25 Due to limited access, a dominant sub-sector furniture and home furnishings were not in the list of participants.
- 26 Entry-Level jobs- that don't involve supervising anyone. For example Cashier, Inventory Associate, Sales Associate, Customer Service Assistant, Warehouse Associate/Material Handler.
- 27 Mid-Level/Supervisory jobs- that require supervising other staff and are often peer-leadership jobs. For example Retail Team Leader, Floor Manager, Department Manager.
- 28 Senior-Level/ Store Management jobs- In a large business, there might be several layers of management. For example Sales Manager, Store Manager, and General Manager.
- 29 Due to small sample size, the analysis could not be conducted by disaggregating findings by different categories of sub-sectors.
- 30 So, percentages would not add to 100%
- 31 *ibid*
- 32 Oschinski, M., & Wyonch, R. (2017). Future shock? The impact of automation on Canada's labour market. C. D. Howe Commentary No. 472. Retrieved from [https://www.cdhowe.org/sites/default/files/attachments/research\\_papers/mixed/Update\\_Commentary%20472%20web.pdf](https://www.cdhowe.org/sites/default/files/attachments/research_papers/mixed/Update_Commentary%20472%20web.pdf)
- 33 The employment pathway model is based on inputs from key partners and data sources. For our example the Standard Occupational Classification (SOC) system is used for jobs, the Occupational Information Network (O\*NET) taxonomy is used for job characteristics and data from the 2016 Canadian Census to identify three priority at-risk occupations for the working age population in Ontario. They were partnerships with Faethm.ai, a global AI organization whose analytics platform determines the risk of automation for each job in our data set and matches at-risk jobs to more sustainable jobs based on shared attributes. Based on the above, MARS mapped feasible job transitions, and presented that using interactive visualizations of their pathways
- 34 MaRS Discovery District. Web: [https://www.marsdd.com/wp-content/uploads/2018/04/MaRS\\_Up\\_To\\_The\\_Task\\_Report.pdf](https://www.marsdd.com/wp-content/uploads/2018/04/MaRS_Up_To_The_Task_Report.pdf)
- 35 LinkedIn. Web: <https://business.linkedin.com/talent-solutions/blog/talent-analytics/2018/data-reveals-the-fastest-growing-job-in-retail-and-it-is-not-sales>
- 36 According to the LinkedIn study reported methodology, insights on the retail industry's workforce composition, hiring trends, popular job titles, and skills are drawn from LinkedIn's aggregate member data.
- 37 LinkedIn study analyzed the skills of software developers at retail companies to find their top skills (by volume of members), fastest-growing skills (calculated by percentage of retail developers adding that skill in last 6 months), and most unique skills (calculated by comparing the percentage of retail developers with certain skills against the percentage of all software developers with those skills).
- 38 Forbes. Web: <https://www.forbes.com/sites/bryanpearson/2018/02/13/your-next-best-job-opportunity-is-in-technology-retail-technology/#3fe8f1dc7dd1>
- 39 *ibid*
- 40 The Globe and Mail. Web: <https://www.theglobeandmail.com/report-on-business/careers/management/professionals-increasingly-seeing-retail-as-a-promising-career-path/article37898519/>
- 41 MaRS Discovery District. Web: [https://www.marsdd.com/wp-content/uploads/2018/04/MaRS\\_Up\\_To\\_The\\_Task\\_Report.pdf](https://www.marsdd.com/wp-content/uploads/2018/04/MaRS_Up_To_The_Task_Report.pdf)
- 42 The Toronto Star. Web: <https://www.theglobeandmail.com/report-on-business/careers/management/professionals-increasingly-seeing-retail-as-a-promising-career-path/article37898519/>
- 43 <https://www.thestar.com/autos/2018/11/03/pilot-program-to-encourage-young-women-to-join-auto-industry.html>



