



Hiring Demand Trends in the Suburban GTA: Jan 2008 to March 2009

12 May, 2009

IT-Challenger Consulting Group / VicinityJobs.com
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About This Report

Methodology

This report looks into recent hiring trends in the suburban communities surrounding the city of Toronto, including Durham, Halton, Peel, and York Regions, referred to as “the suburban GTA communities”. The report is produced by analyzing 194,500 postings for jobs located in these regions, found on various online job boards and employer web sites in the time between Jan 1, 2008 and March 31, 2009. Postings from all major job boards are included, including Monster.ca, Workopolis.com, Jobbank.gc.ca, Working.com, Careerbuilder.ca, as well as the classified web sites of regional newspapers, and specialized job boards such as charityvillage.com (non-profit jobs) and medhunters.com (medical jobs). No new sources of a significant number of job postings were introduced or removed from the index in the analyzed period, in order to ensure the comparability of data between periods.

The approach used in this report to track hiring demand is based on the realization that a higher/lower number of postings for certain jobs reflects a higher/lower level of hiring demand for such jobs. For example, when the balance between demand for and supply of engineers shifts in favour of the employers, the number of postings for engineering jobs decreases as employers do not need to advertise engineering jobs as actively as they would have otherwise.

Industry-specific hiring demand data is currently only produced for York Region. This is done by assigning job postings to employers from a database containing 18,086 York Region employers, which is considered to be statistically representative of all employers in the region. The employer – and therefore the industry – is identified for a sample of about 22% of all postings. The distribution of jobs between industries calculated for this sample is then applied to the complete data set.

About IT-Challenger Consulting Group and VicinityJobs.com

This report was prepared by IT-Challenger Consulting Group – a vertical Internet search and reporting technologies provider based in Newmarket, Ontario. IT-Challenger’s services are built around IT-Challenger’s Vicinity Jobs service (<http://www.vicinityjobs.com>) and its intelligence gathering and reporting modules.



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Vicinity Jobs is a network of community employment websites built to make Ontario's suburban and rural communities more socially and environmentally sustainable, eliminate unnecessary long-distance commutes, and provide employers with environmentally and socially responsible recruiting alternatives.

Each Vicinity Jobs website serves a separate geographic community, and uses IT-Challenger's industry-leading vertical Internet search technology to give local job seekers easy access to information from various websites about job openings close to their homes. Vicinity Jobs portals are also traditional job boards where local employers can post jobs and connect with local job applicants.

Each Vicinity Jobs website is marketed exclusively to the community that it serves through a network of partnerships with local community service providers and businesses. FairyLakeJobs.net -- the first Vicinity Jobs website launched in 2006 (serving York Region) -- was one of North America's first vertical job search engines.

For more information about this report or about the Vicinity Jobs Network, contact IT-Challenger Consulting Group at pr@vicinityjobs.com or 1(800) 818 0213 ext. 21.

Acronyms and Abbreviations

YoY – Year-over-year

Q1/2008 – The first quarter of 2008 (the months of January, February, and March 2008)

Q1/2009 – The first quarter of 2009 (the months of January, February, and March 2009)

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Executive Summary

Hiring demand in the suburban GTA communities of Durham, Halton, Peel, and York regions declined by 30.4% year-over-year in Q1/2009 vs. Q1/2008. The bulk of the decline occurred in Q4 of 2008. While there are no clear signs of a recovery yet, the worst of the downturn seems to be over, as hiring demand has stabilized and is following the same seasonal pattern in 2009 as in 2008. *(Note, however, that the unemployment rate is still likely to increase in the coming months despite the growth in hiring demand, as some companies execute their layoff plans. An increased hiring demand, however, means that the economy is creating more employment opportunities than in previous months, this presenting a better chance for the unemployed to find jobs than a few months ago.)*

Demand for jobs in occupation classes typically associated with less skills requirements – Administrative, Help Wanted (incl. Warehouse help), and Processing/Manufacturing/Utilities – were affected more severely by the downturn than demand for more skilled jobs. Hiring demand for managers was affected less than demand for most other occupation classes, suggesting that businesses have been “trimming fat” rather than restructuring. As a result, locations where Management jobs represented a larger share of the hiring demand in early 2008 (such as Mississauga) fared better in the downturn. Hiring demand in the Healthcare and Social, Gov’t, and Religious services occupation classes increased despite the downturn.

The slowdown concentrated Suburban GTA’s Hiring Demand further into the top 4 employment locations (Mississauga, Markham, Brampton, and Oakville). These accounted for 57% of all advertised job openings in Q1/2009, up from 52% in Q1/2008. Mississauga in particular fared significantly better in the downturn than most other municipalities: The number of new job postings there declined by only 2% (however, the share of postings for part-time jobs increased from 5% to 8%). In most other larger towns and cities across the suburban GTA, the proportion between full-time and part-time jobs remained largely unchanged, with the notable exception of Oshawa where the share of part time jobs increased from 19% to 26%.

Industry-specific hiring demand data available for York Region suggests that certain industries – such as Professional, Scientific, and Technical services (NAIC 54) – were affected more by the downturn than others. Hiring demand in many suburban towns and cities depends heavily on specific industries, which explains the varying impact that the downturn had on hiring demand in different locations.



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The trends uncovered by this research point to three economic risks in the near future: (1) In case of a prolonged recession, declines in hiring demand for managers may deepen, as more employers may need to restructure. (2) Once the economy starts recovering, it may replace demand for less skilled jobs with demand for skilled ones. This may cause a higher longer-term structural unemployment in the suburban GTA. (3) If the tendency of hiring demand to concentrate in the top 4 locations does not change when the economy starts recovering, this may lead to more people having to commute long distances to and from work.



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Hiring Demand Trends in The Suburban GTA - Overview

Hiring demand declined by 30.4% YoY in Q1/2009 compared to Q1/2008 (30,288 new job postings in Q1/2009, vs. 43,491 in Q1/2008). The steepest decline, however, occurred in Q4/2008, after which the demand seems to have stabilized at its new lower level. An indication that the worst of the downturn may be over is the fact that hiring demand in the suburban GTA communities followed the same patterns in Q1/2008 as in Q1/2009, as illustrated by Figure 1:

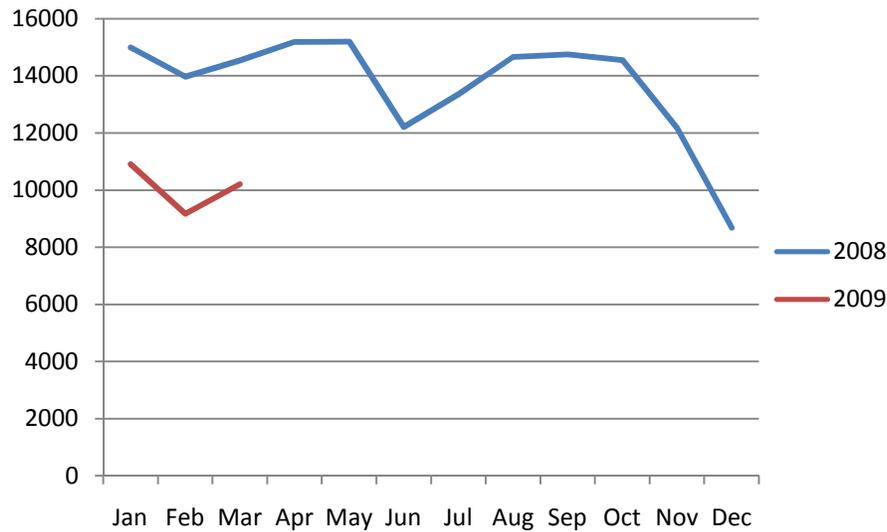


Figure 1: Hiring Demand in Suburban GTA between 01 Jan 2008 and 31 March 2009

Hiring Demand Disparities by Occupation Class

A closer look at the data reveals significant variations in the magnitude of the decline between occupation classes. Table 1 below illustrates that, although most occupation classes experienced a decline, demand for Healthcare professionals (often seen as recession-proof) actually increased. A significant increase was also recorded in the demand for providers of social, religious, and government services, driven primarily by an increase in the number of jobs posted for caretakers and support workers.



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	Q1/08	Q1/09	% Change
Administrative and Legal	5,580	3,213	-42.4%
Arts, Cultural, Recreation, Sports	849	528	-37.8%
Business, Finance, Accounting	4,611	2,995	-35.0%
Education	723	541	-25.2%
Engineers, Architects, IT, Natural Science	3,112	2,194	-29.5%
Farming, Fishing, Natural Resources	29	9	-69.0%
Health	1,078	1,286	19.3%
Help Wanted (including warehouse jobs)	5,193	2,689	-48.2%
Management	4,745	4,054	-14.6%
Other	4,173	3,282	-21.4%
Processing, Manufacturing, Utilities	1,937	885	-54.3%
Retail and Services	4,794	3,062	-36.1%
Sales	3,198	2,375	-25.7%
Social, Gov't, Religious Services	292	1,256	330.1%
Trades, Transport, Construction	3,177	1,919	-39.6%
	43,491	30,288	-30.4%

Table 1: Hiring demand by occupation class in Q1/2009 vs. Q1/2008

It is worth mentioning that **demand for management jobs has so far declined significantly less** than demand for most other occupation classes. This provides some clues concerning the strategy adopted by employers in dealing with the downturn:

If most employers were restructuring their organizations to reduce their sizes, this would result in a significant drop in the demand for managers, as less complex organizations would include less managerial positions. This, however, is not what we are seeing. Instead, employers seem to have been “trimming fat”: Essentially reducing the sizes of their teams while preserving the existing organizational structures so they can meet an increased demand in better times.

This spells a risk that, in the possible case of a prolonged recession, more employers may see themselves pressured to restructure their businesses so they can cope with a sustained lower level in the demand for their products and services. If this occurs, the demand for managers will decline. Since restructuring most business could be a long and complex endeavor, the full impact that such restructuring efforts will have on hiring demand may not become evident for months after the restructuring efforts have began.



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It is also important to look into the occupation worst for which **hiring demand decreased the most: Administrative/Legal, Processing/Manufacturing/Utilities, and Help Wanted (incl. warehouse) jobs**. To some extent, the decrease in the demand for these occupation classes is a direct result of the employers' efforts to adapt to the new reality by "trimming fat". However, most jobs in these classes are typically filled by individuals whose levels of education may make it impossible for them to find work in other occupation classes (management, healthcare, etc).

There is, therefore, a risk that, in case of a sluggish recovery, hiring demand for these occupations may be slow to pick up – especially if employers step up efforts to outsource such jobs to lower-paying countries as a strategy of dealing with more competitive markets. This may result in an increased structural unemployment in the suburban GTA, where many unemployed individuals would not be qualified to fill the jobs that the economy would be creating without additional training.

Hiring Demand by Region

Hiring demand in the regions of Durham, Halton, Peel, and York followed largely the same pattern. However, the magnitude of the decline that was experienced varied somewhat between regions. Figure 2 below shows how demand varied in 2008 and Q1/2009 compared to the January 2008 levels, and illustrates that the slowdown in hiring demand was most severe in Halton and York regions, whereas hiring demand in Peel region declined the least:

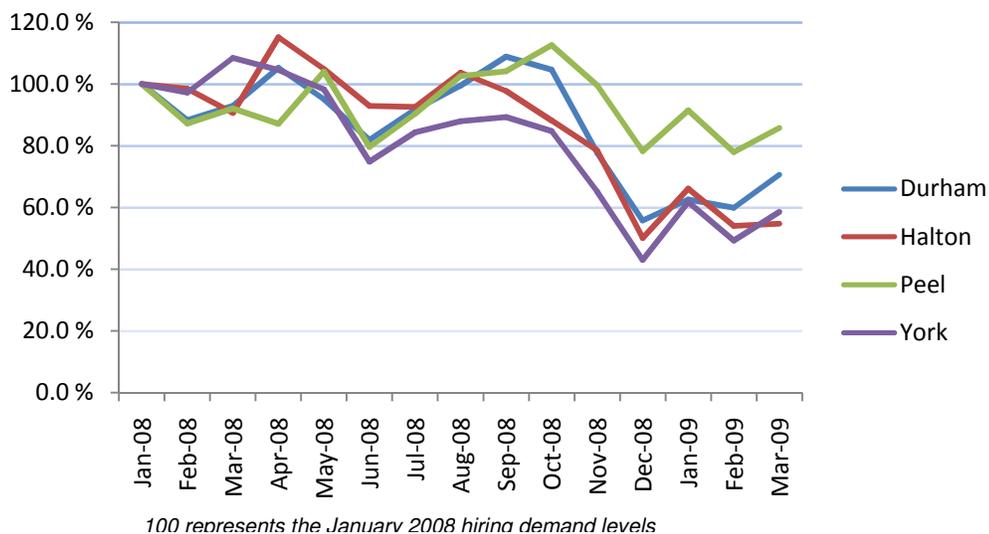


Figure 2: Regional Hiring Demand Compared to Jan 08 Levels



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Figure 3 below illustrates that the ongoing recession has so far concentrated even more of the suburban GTA's hiring demand in the top 4 locations. In Q1/2009, 57% of all job postings were for jobs located in Mississauga, Markham, Oakville, and Brampton, compared to 52% a year ago. Mississauga's hiring demand share increased most significantly, from 21% to 29%:

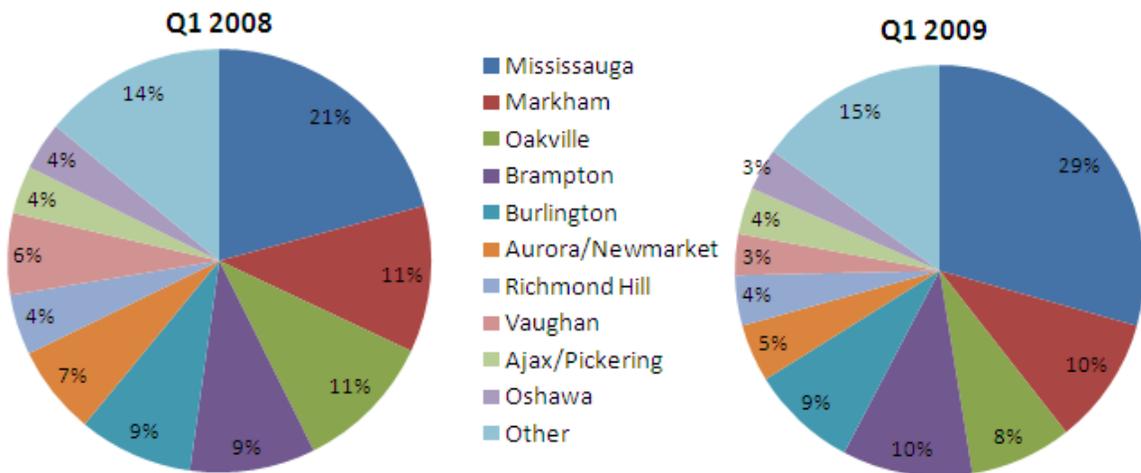


Figure 3: Hiring demand in suburban GTA's top 10 areas - Q1/09 vs. Q1/08

This trend may reverse itself as the economy strengthens. However, if it does not, the geographic concentration of job openings may cause some regional planning and environmental challenges across the GTA, as people living in communities with less employment opportunities may find themselves forced to commute to the locations with more jobs. This could result in increased use of roads public transit. In some cases, people who are not in a position to relocate may not be able to pursue employment opportunities far from their homes, which could cause them to remain unemployed for longer periods of time.

The likelihood of these disparities persisting when the economy starts recovering depends on their causes. They may be partially the result of different industries having been affected differently by the downturn, since some industries are more strongly represented in certain regions than in others. However, analysis of hiring demand by industry is only currently performed for York Region's postings. The capability to perform such analysis is available for all remaining regions as well but requires the cooperation of major local business associations and/or government. At present, only York Regional Government supports this more in-depth analysis.



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Trends by Municipality

Durham Region

Hiring demand in Durham Region experienced a YoY decline of 31.3% in Q1/2009 compared to Q1/2008 – roughly in line with the total average decline rate in the suburban GTA of 30.4%.

18,654 postings for jobs located in Durham Region were found in the year of 2008. Given Durham region's labour force size of 280,000 working age residents (source: Statistics Canada, 2001 census), there were approx. 15 working age residents per job posting in 2008.

Figure 4 shows how hiring demand changed in the analyzed period for each of the 4 largest occupation classes in Durham Region. Like in the other municipalities, Management jobs were less affected by the downturn, but the remaining 3 of the top 4 occupation classes in Durham were among those hit disproportionately hard:

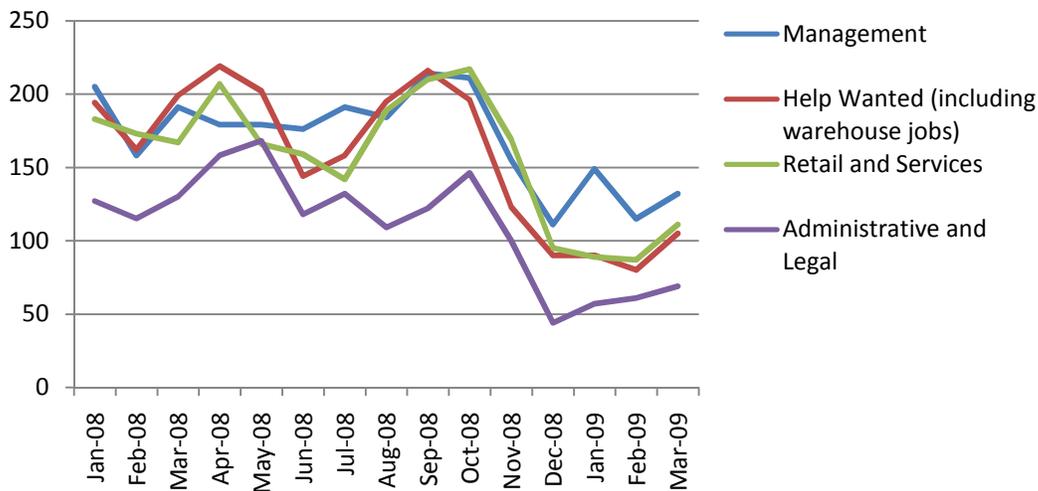


Figure 4: Hiring Demand (Number of Postings) in Durham Region for Top 4 Occupation Classes

This figure suggests that, as the downturn was deepening, less skilled Durham residents would have found it particularly difficult to find employment opportunities in their home communities.



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Oshawa

Oshawa experienced a 37% Year-over-Year (YoY) hiring demand decline in Q1/2009 (1,006 job postings in Q1/2009 vs. 1,598 in Q1/2008). As the graph on Figure 5 illustrates, overall hiring demand in the city of Oshawa remained stable until September 2008, after which it started deteriorating. The decline continued until February of 2009, but may have been reversed in March.

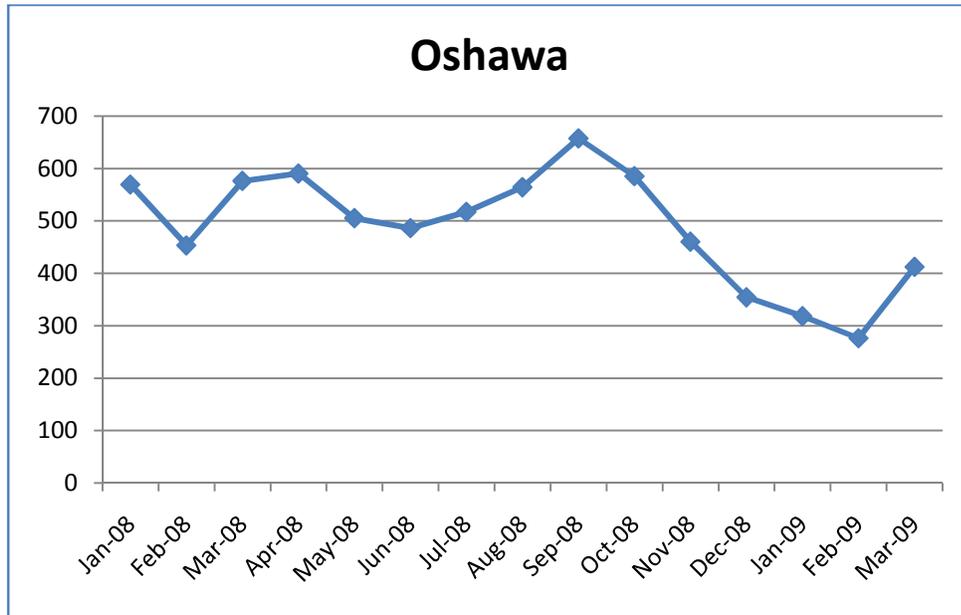


Figure 5: Hiring Demand (Number of Postings) in Oshawa

The demand in Oshawa also shifted between jobs in different occupation classes: Hiring demand for Healthcare professionals increased from Q1/2008 to Q1/2009, while all other major occupation classes saw declines:



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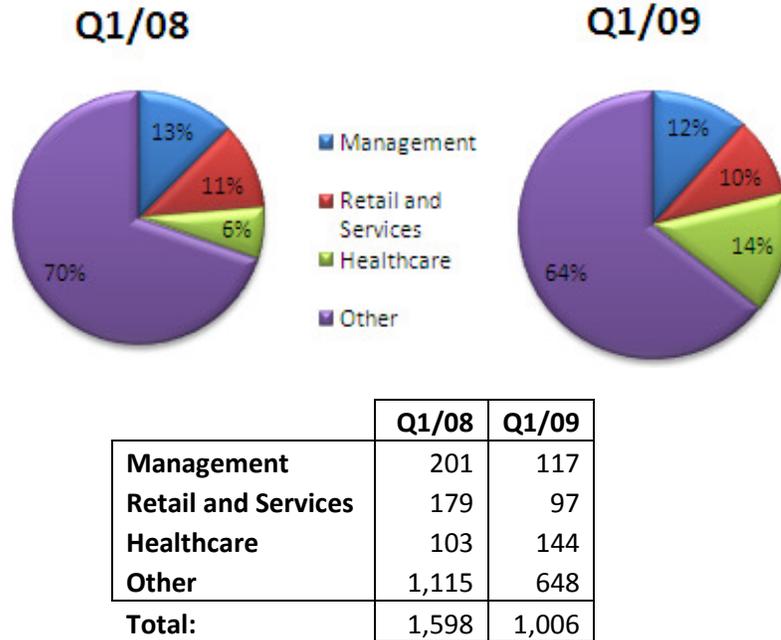


Figure 6: Hiring Demand (Number of Postings) in Oshawa by Occupation Class Q1/2009 vs. Q1/2008

The economic downturn brought a worsening in the quality of posted jobs in Oshawa: The already high share of part-time jobs raised significantly to an even higher level:

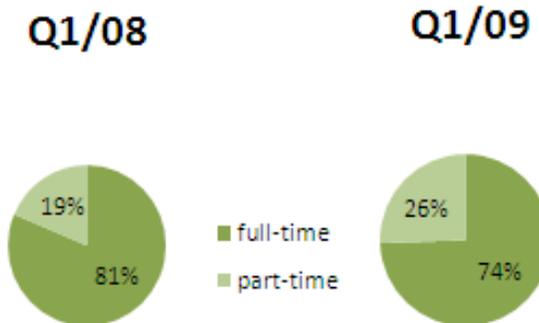


Figure 7: Full-time vs. Part-time jobs in Oshawa in Q1/2009 vs. Q1/2008



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Ajax / Pickering

In Ajax and Pickering, the hiring demand seems to have bottomed out in December of 2008, and experienced a slight improvement since then (see Figure 8). The overall decline in the number of job postings was 29.7% (1,115 in Q1/2009 vs. 1,587 in Q1/2008) - almost equal to the suburban GTA average.

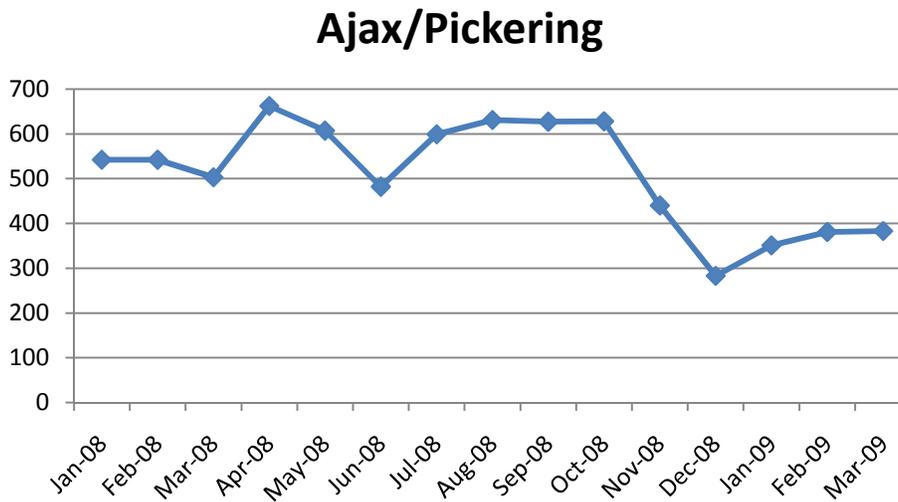


Figure 8: Hiring Demand (Number of Postings) in Ajax/Pickering



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Halton Region

Hiring demand in Halton Region experienced a YoY decline of 39.5% in Q1/2009 compared to Q1/2008 – which is more than the total average decline rate in the suburban GTA of 30.4%.

39,295 postings for jobs located in Halton Region were found in the year of 2008. Halton region's labour force size is 213,000 working age residents (source: Statistics Canada, 2001 census), so there were approx. 5.4 working age residents per job posting published in 2008.

Figure 9 shows the hiring demand trend for jobs in the major occupation classes in Halton Region. At the beginning of 2008, the top 3 occupation classes for job postings in Halton Region were ones dominated by lower-skilled and unskilled jobs (Help Wanted, Administrative, Retail and Services). However, as the downturn worsened, demand for these jobs saw a disproportionately fast decline – which may partially explain why the overall hiring demand decline in Halton Region was worse than the GTA average. In March 09, Management jobs accounted for the largest share of Halton Region's hiring demand.

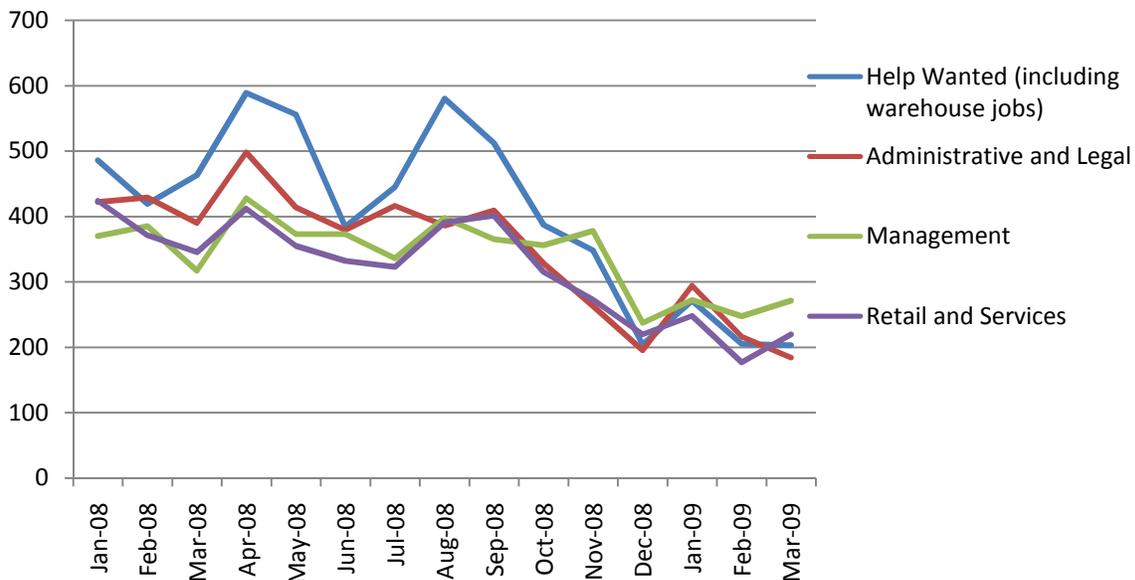


Figure 9: Hiring Demand (Number of Postings) in Halton Region for Top 4 Occupation Classes



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Oakville

Hiring demand in Oakville experienced a significant YoY decline of 47.6% from Q1/2008 to Q1/2009 (2,430 job postings in Q1/2009 vs. 4,638 in Q1/2008). Overall hiring demand in Oakville was flat until August 2008, when a decline began – as illustrated in Figure 10. The decline, however, may have ended in December of 2008, and hiring demand in Q1/2009 followed the same patterns as Q1/2008.

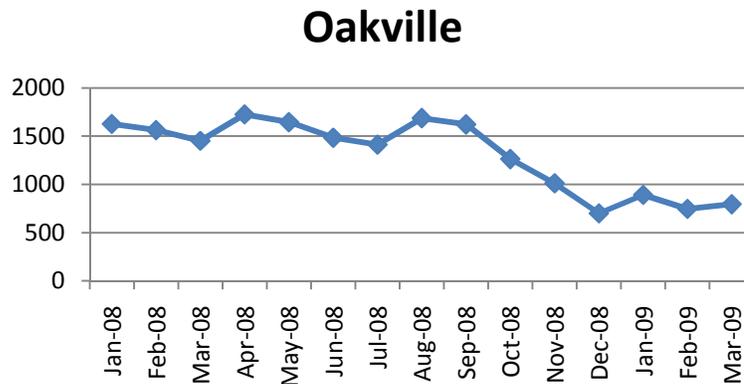


Figure 10: Hiring Demand (Number of Postings) in Oakville

The predominant occupation classes that employment opportunities in Oakville belong to provides some clue as to why the hiring demand decline in Oakville was more severe compared to other suburban GTA communities. As figure 11 shows, Oakville's hiring demand is dominated by posting for lower-skilled and unskilled jobs that were worse affected by the downturn:



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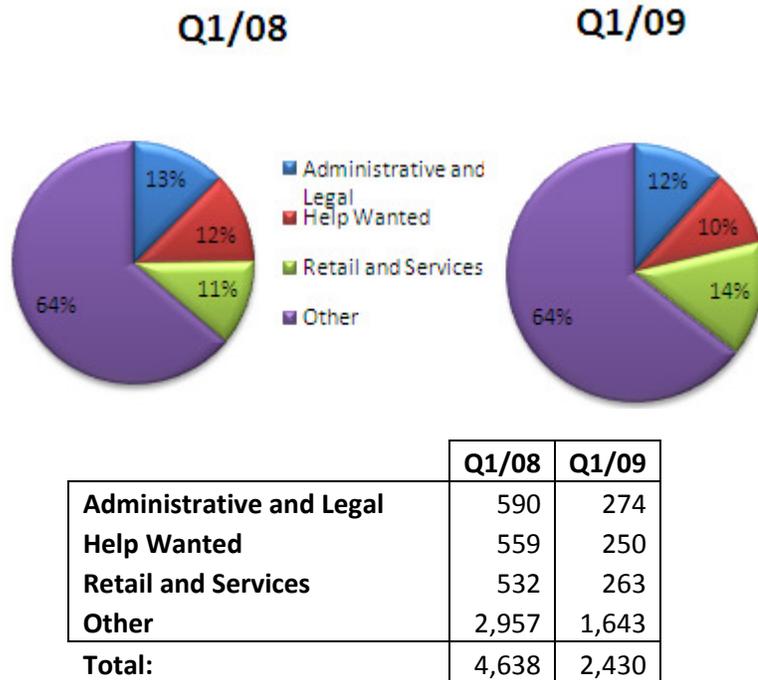


Figure 11: Hiring Demand (Number of Postings) in Oakville by Occupation Class Q1/2009 vs. Q1/2008

The quality of Oakville’s job openings worsened as well: In Q1/2008, the share of part-time jobs in Oakville increased YoY from 12% to 15%:

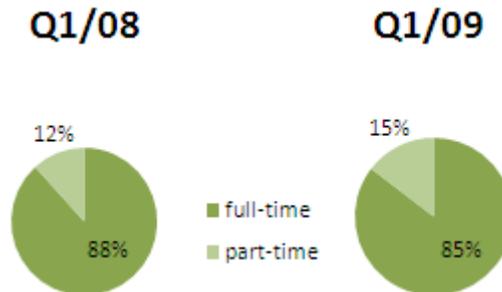


Figure 12: Full-time vs. Part-time jobs in Oakville in Q1/2009 vs. Q1/2008



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Peel Region

Peel Region is suburban GTA's largest employment area, and accounted for 56,933 job postings published in 2008. With a labour force consisting of about 564,000 residents (Source: Statistics Canada 2001 census), there were 9.9 working age residents for each job posting published in 2008.

With a hiring demand decline YoY of "only" 8.7% in Q1/2009 (12,772 job postings in Q1/2009 vs. 13,982 in Q1/2008), Peel Region fared significantly better than the other region in suburban GTA.

As Figure 13 shows, the number of postings for management positions was actually up 14.7% to 1,905 in Q1/2009 from 1,661 in Q1/2008. The increase was largely due to a sharp increase in the number of postings for management positions in the time between January and October 2008, which the subsequent decline failed to erase.

Another occupation class that accounts for a significant share of all job openings in Peel region and fared quite well under the circumstances is Business/Finance/Accounting. Postings for jobs in this class declined YoY by 7.3% in Q1/2009 (to 1,539 down from 1,661 in Q1/2008), compared to an average decline of 35% for the same class and period in all suburban GTA communities.

Of the other major occupation classes in Peel Region, hiring demand for both Administrative/Legal jobs and for Retail/Services jobs declined significantly – like elsewhere in the GTA. Hiring Demand in the Retail and Services class was quite volatile in the analyzed period, and peaked in October 2008.



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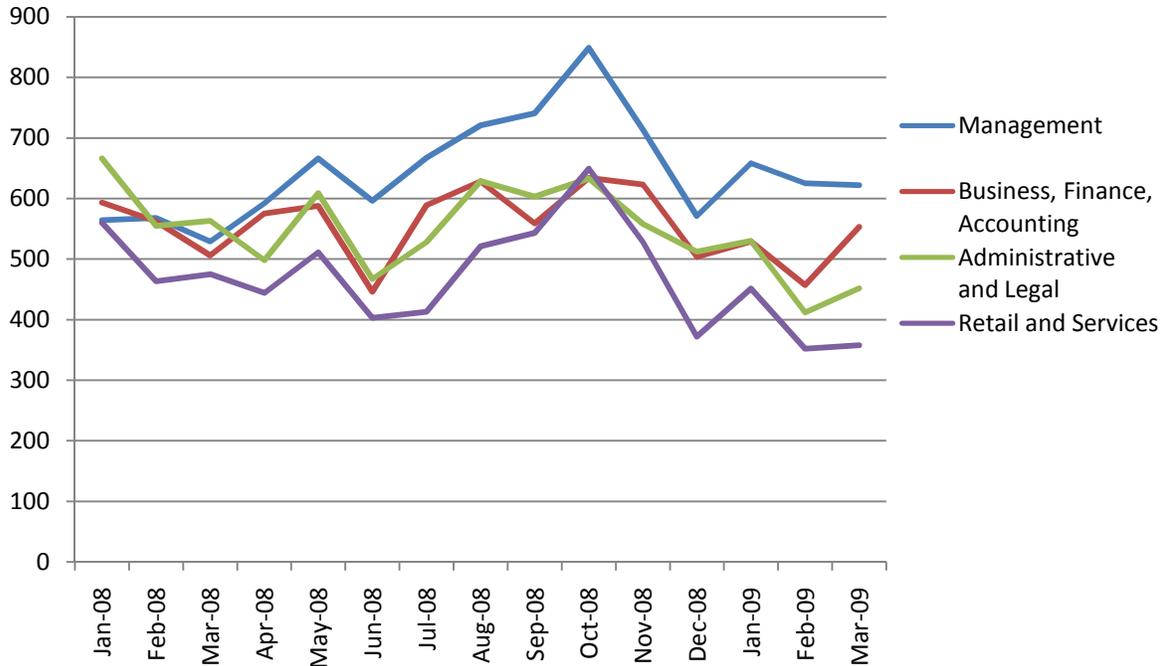


Figure 13: Hiring Demand (Number of Postings) in Peel Region for Top 4 Occupation Classes

This figure suggests that, although hiring demand in Peel Region declined significantly less in 2008 and Q1/2009 compared to the other regions, less skilled unemployed people in Peel Region (those looking for administrative or retail and services jobs) would have found it no easier to secure employment close to their homes than their counterparts in other suburban GTA communities.

Brampton

Brampton experienced a 25.4% YoY hiring demand decline in Q1/2009 (3,104 job postings in Q1/2009 vs. 4,160 in Q1/2008). As the graph on Figure 14 illustrates, most of the decline in Brampton occurred in the last quarter of 2008, and the situation seems to have stabilized in Q1/2009.



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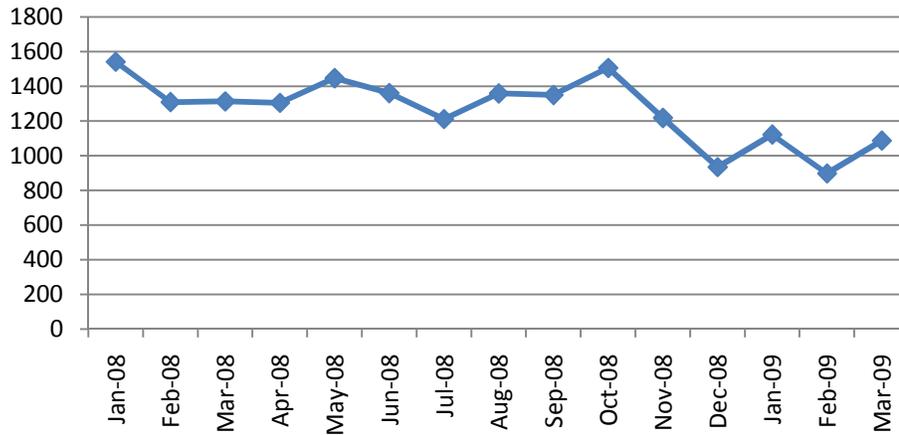
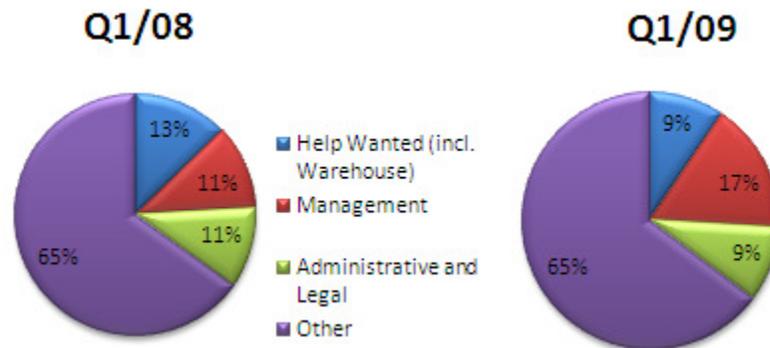


Figure 14: Hiring Demand (Number of Postings) in Brampton

The top 3 occupation classes for which hiring demand is highest in Brampton are Help Wanted (incl. Warehouse), Administrative and Legal, and Management. The number of postings for Management jobs increased YoY from Q1/2008 to Q1/2009, whereas the number of postings for jobs in the Administrative/Legal and Help Wanted classes decreased significantly:



	Q1/08	Q1/09
Help Wanted (incl. Warehouse)	533	292
Management	472	513
Administrative and Legal	448	290
Other	2,707	2,009
Total:	4,160	3,104

Figure 15: Hiring Demand (Number of Postings) in Brampton by Occupation Class Q1/2009 vs. Q1/2008



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The distribution between full-time and part-time job openings in Brampton remained largely unchanged, as illustrated by Figure 16.

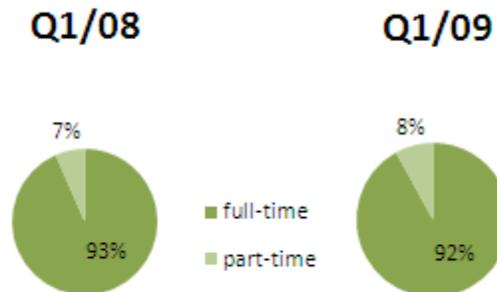


Figure 16: Full-time vs. Part-time jobs in Brampton in Q1/2009 vs. Q1/2008

Mississauga

Mississauga – the largest city in suburban Ontario – has also has the largest job market. 37,742 postings for jobs located in Mississauga were found in 2008. Overall, hiring demand in Mississauga remained steady despite the economic downturn (see Figure 17), registering a year-over-year decline of only less than 2% in Q1/2009 (with 8,886 postings) compared to Q1/2008 (9,054 postings)



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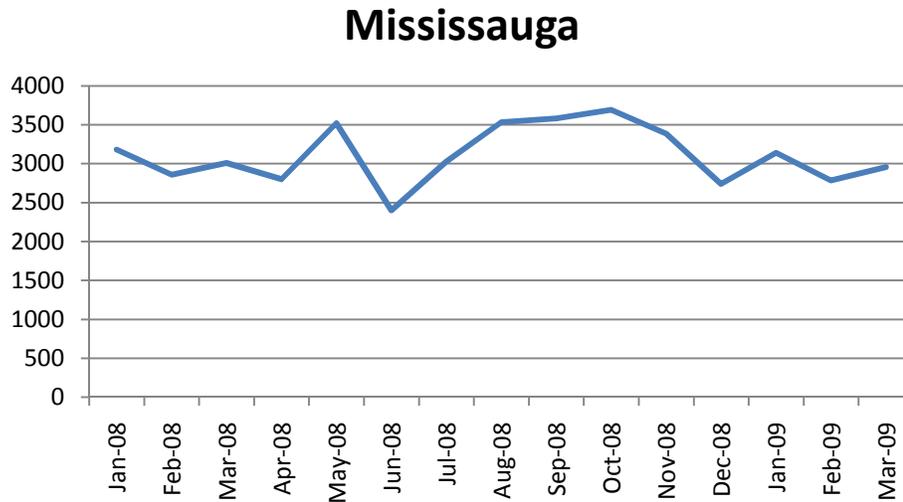


Figure 17: Hiring Demand (Number of Postings) in Mississauga

Although the total hiring demand in Mississauga remained stable, its distribution between jobs of different occupation classes changed: Demand for Administrative and Legal jobs declined YoY, while demand for management jobs increased (see Figure 18). It is interesting, however, that in Mississauga, demand for jobs in the Administrative/Legal and Business/Finance/Accounting occupation classes declined less than in the other suburban GTA communities.



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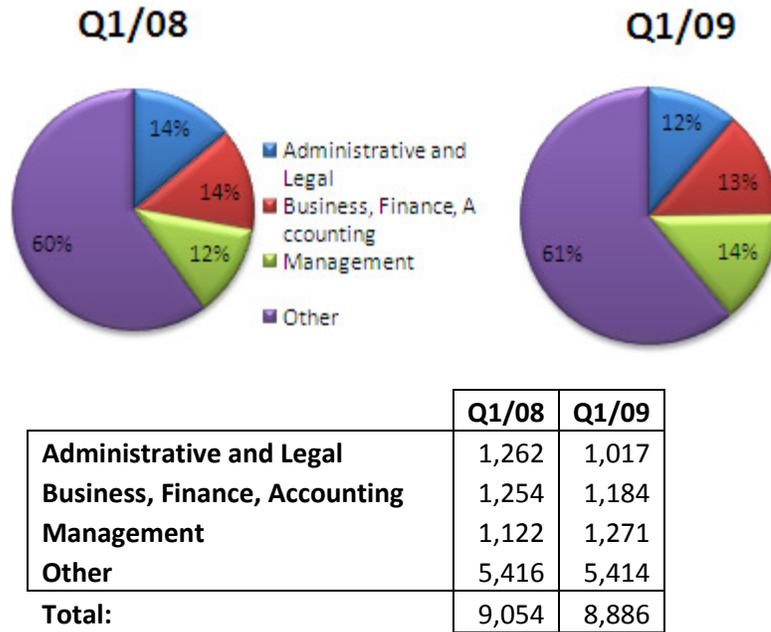


Figure 18: Demand (Number of Postings) in Mississauga by Occupation Class Q1/2009 vs. Q1/2008

The economic slowdown did, however, bring a worsening in the overall quality of the jobs advertised in Mississauga: The share of postings for part-time jobs increased substantially from 5% in Q1/2008 to 8% in Q1/2009 (Figure 19):

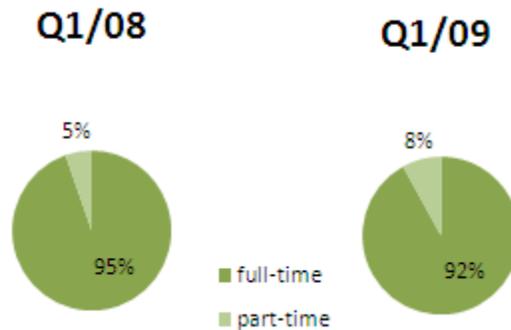


Figure 19: Full-time vs. Part-time jobs in Mississauga in Q1/2009 vs. Q1/2008



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York Region

Hiring demand in York Region experienced a YoY decline of 44.5% in Q1/2009 compared to Q1/2008.

49,361 postings for jobs located in York Region were found in the year of 2008. York region's labour force consists of 406,000 working age residents (source: Statistics Canada, 2001 census), so there were approx. 8.2 working age residents for each job posting published in 2008.

The higher-than-average decline in hiring demand in York Region is partly due to the fact that, as the economy was entering into a recession, hiring demand in the region was dominated by occupation classes that were particularly affected by the slowdown: In January 2008, hiring demand in York Region was highest for jobs in the Administrative/Legal, Help Wanted (incl. warehouse), and Retail/Services classes (see Figure 20).



Figure 20: Hiring Demand (Number of Postings) in York Region for Top 4 Occupation Classes

However, the reliance on Administrative/Legal and Business/Finance/Accounting jobs cannot be the only explanation behind the disproportionately high severity of York Region's downturn, as even demand for Management jobs experienced an above-average YoY decline of 34% in the region. Another reason may be the fact that industries with stronger presence in York Region may be affected more by the downturn.



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In fact, York Region's job market is quite dependent on hiring demand from the Professional, Scientific, and Technical Services industries (NAIC code 54): In Q1/2009, employers in these industries accounted for as much as 13% of all York Region postings, and their hiring demand was down 49% YoY compared to Q1/2008.

Markham

Markham has suburban GTA's second largest job market, measured by hiring demand. The town experienced a 37% YoY decline in the number of job postings in Q1/2009 vs. Q1/2008. The hiring demand decline in Markham started earlier than in most other suburban GTA communities, and continued throughout the year 2008 (although it did intensify in the last quarter) – as illustrated in Figure 21. However, the decline seems to have stopped in the first quarter of 2009.

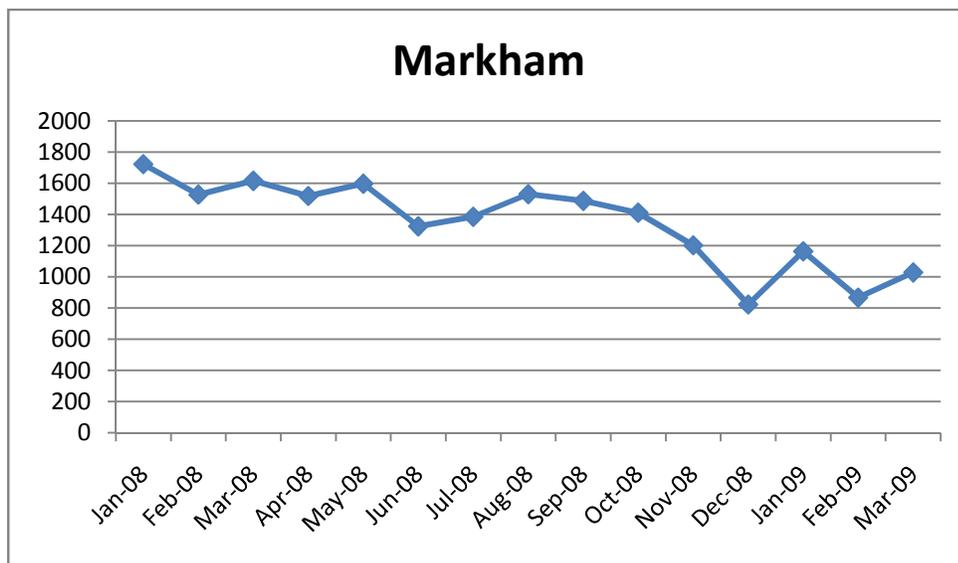


Figure 21: Hiring Demand (Number of Postings) in Markham

Hiring demand declined Year-over-year in all major occupation classes in Markham in Q1/2008 vs. Q1/2009. The decline was particularly severe for the Administrative/Legal and Business/Finance/Accounting occupation classes, which, together, accounted for 22% of all new job postings in Markham in Q1/2009, down from 29% in Q1/2008. Postings for jobs in the Retail and Service occupation class, on the other hand, declined by "only" 27% (significantly less than the suburban GTA average 36% decline).



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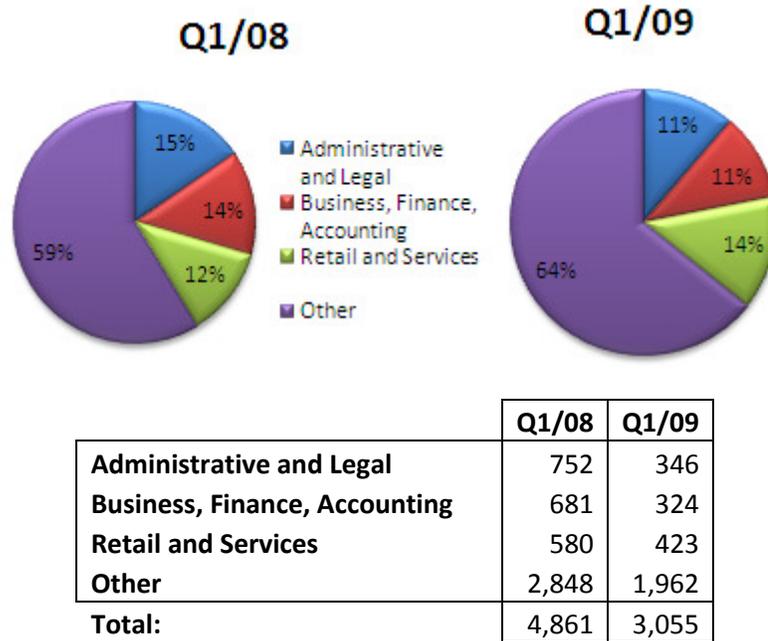


Figure 22: Demand (Number of Postings) in Markham by Occupation Class Q1/2009 vs. Q1/2008

Hiring demand in Markham is strongly dominated by employers in the Professional, Scientific, and Technical Services industry (NAIC 54), as illustrated in Table 2.

	Q1/2009		
	#	% total	% change vs. Q1/ 2008
Professional, Scientific and Technical Services (NAICS 54)	863	28	-40
Retail Trade (NAICS 44)	289	9	-48
Wholesale Trade (NAICS 41)	274	9	-2
Manufacturing (NAICS 33)	244	8	-36
All Other Industries	1,385	45	-37
TOTAL	3,055	100	-37

Table 2: Hiring Demand by Industry Q1/2009, Markham

The distribution between part-time and full-time job openings remained largely unchanged in Markham from Q1/2008 to Q1/2009, as illustrated by Figure 23.



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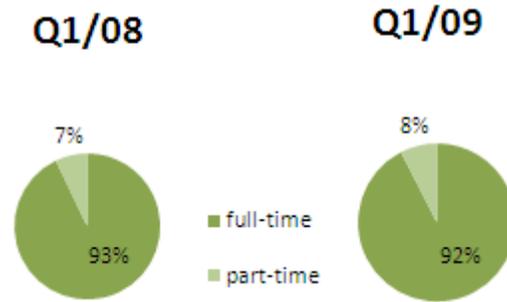


Figure 23: Full-time vs. Part-time jobs in Markham in Q1/2009 vs. Q1/2008