

FOUR COUNTY LABOUR MARKET PLANNING BOARD

# EMPLOYER ONE

2020



## ACKNOWLEDGMENTS

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Four County Labour Market Planning Board (FCLMPB) is a community-directed, not-for-profit corporation assisting Bruce, Grey, Huron, and Perth counties in its approach to workforce development and labour market planning. Our mission is to plan and promote local labour market strategies to meet the challenges of a changing economy.

We wish to thank the following:

### **Memorandum of Understanding Partners:**

- Bruce and Grey Federations of Agriculture
- The Centres for Employment and Learning of Avon Maitland District School Board
- Conestoga Career Centre
- Corporation of the County of Bruce
- Corporation of the County of Grey
- Corporation of the County of Perth
- Fanshawe College
- Georgian College of Applied Arts and Technology
- Huron Manufacturing Association
- Kincardine and District Chamber of Commerce
- Municipality of Brockton
- Municipality of North Perth
- Partners in Employment
- QUILL Learning Network
- Saugeen Economic Development Corporation (SEDC)
- Town of Goderich
- Town of Hanover
- Township of Perth East
- VPI Working Solutions (Walkerton)
- YMCA of Owen Sound Grey Bruce
- Wiarton and District Chamber of Commerce

### **Business Owners and Managers who assisted by completing this survey**

### **Staff of the Four County Labour Market Planning Board**



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## BACKGROUND

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The EmployerOne Survey was conducted for the sixth time in January 2020 in the four county region, which includes the counties of Bruce, Grey, Huron, and Perth. In total, 421 businesses responded to the survey; 341 businesses completed all questions and 80 businesses completed some of the questions in the survey. These business respondents continue to provide valuable insights into changes in the local labour market.

The ongoing importance of EmployerOne is the survey's ability to collect and summarize timely demand-side data directly from employers. This information is crucial to local organizations engaged in workforce attraction and retention strategies, strategic planning, and other community projects requiring up-to-date labour market data. In a small labour market, these type of data can be challenging to acquire, and EmployerOne has filled this need for six years. After relatively consistent results over the past several years, the Planning Board has decided not to undertake this project again in 2021. We will continue to consult with employers and understand their experiences through different outreach projects focusing on retention strategies, precarious employment, and youth outreach. The success of local businesses rests partly on understanding how we can continue to keep employees long-term and assist individuals of all ages, and their families, to thrive in our communities.

## METHODOLOGY

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For the purposes of this report, only responses from the 341 completed surveys have been included.

For the purposes of this report, Perth County speaks to the geography which includes Stratford and St Marys.

Based on business counts for 2019 (including only businesses with one or more employees), completed survey responses represent 3.0% of all businesses in the four county area.

Based on business counts for 2019, the aggregate survey results have a confidence level of 95% ± 6.

Both industry sector and business size are variables that impact responses to many survey questions and will be highlighted several times in this report. Several datasets will include a summary of all survey responses, followed by:

- A comparison of results in each of the top five sectors for the Stratford-Bruce Peninsula Economic Region (agriculture, construction, healthcare and social assistance, manufacturing, wholesale and retail trade);
- A comparison of results by business size (based on number of employees).

As in previous reports, significant changes compared to surveys from past years will be noted where deemed to be significant. For many of the data points presented in this report, the response rate will be given for the current survey, followed by a change notation in brackets. This indicates change compared to 2019 survey results. Terminology indicating this change from the previous year is used throughout this report as follows:

- Increase/decrease represents a change of at least 5%;
- Slight increase/slight decrease represents a change of less than 5%.

## GENERAL LABOUR MARKET CONDITIONS

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Between 2018 and 2019, the unemployment rate for Stratford-Bruce Peninsula – encompassing Bruce, Grey, Huron and Perth counties – increased by 0.6 percentage points from 3.7% to 4.3%. In 2019, this region maintained the lowest annual unemployment rate of any economic region in Ontario. From 2018 to 2019, the provincial unemployment rate remained unchanged at 5.6%.

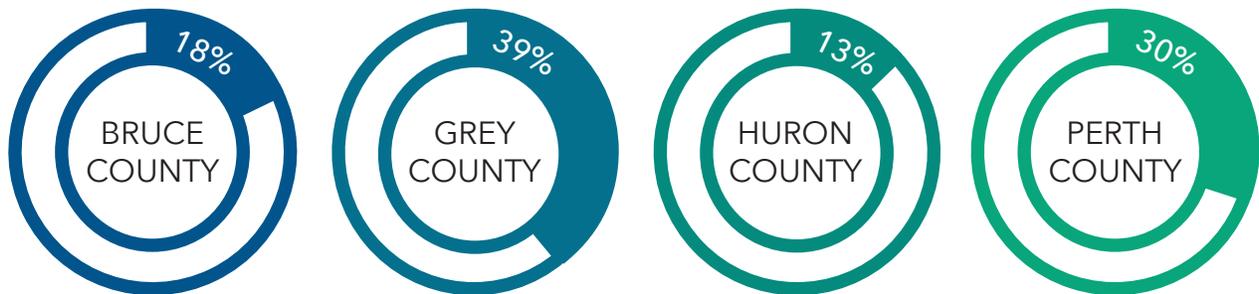
The employment rate, the share of the labour force that is employed, in the Stratford-Bruce Peninsula economic region decreased from 62.7% to 61.8% in 2019. The participation rate, the share of the population that is participating in the labour market, decreased from 65.2% to 64.6% between 2018 and 2019. The local labour pool decreased by 300 between 2018 and 2019. During the same period, employment decreased by 1,200. Full-time job losses (5,400) were offset by part-time gains (+4,100).

Results from this year's EmployerOne survey suggest that employers are increasingly struggling with the effects of low unemployment and high participation rates across our region. The Planning Board is continuing to focus on research that will assist with attraction and retention strategies, in an effort to understand how our businesses and communities are promoting positive places to both work and live. Understanding what draws workers and their families to our region – as well as which factors will influence decisions to stay long-term – is central to the work the Planning Board will undertake in the upcoming year. For more information about current and future projects, please follow updates on our website at [www.planningboard.ca](http://www.planningboard.ca).

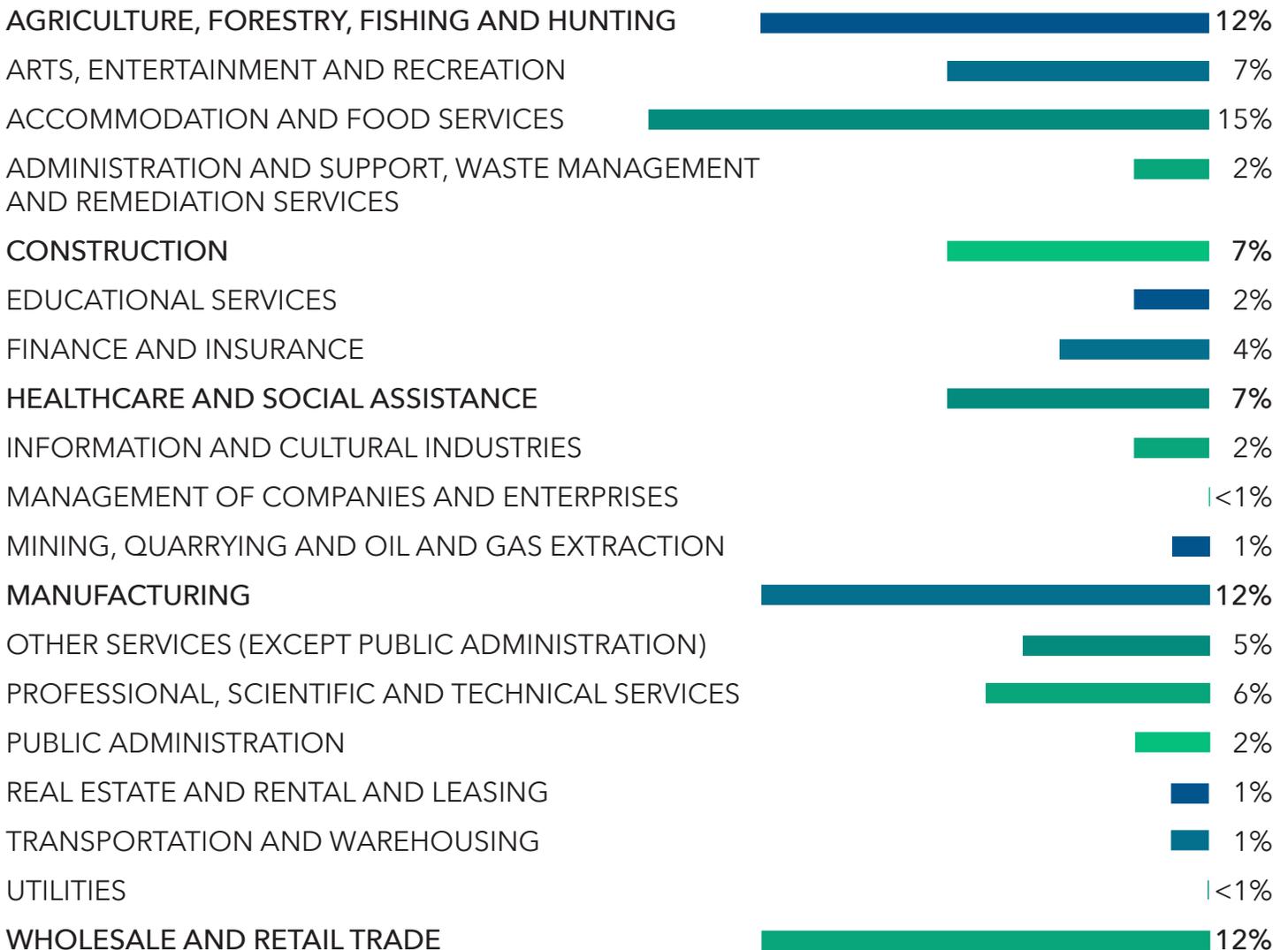
# SURVEY DEMOGRAPHICS

A breakdown of the 341 completed survey responses used in this report is shown as follows. These infographics represent the distribution of survey responses by: county, sector, percentage of business derived from tourism, percentage of start-up businesses, and percentage of businesses with head office locations in our region.

## COUNTY



## SECTOR



## PERCENTAGE OF BUSINESS RELATED TO TOURISM

This graph identifies the percentage of business that responding employers identified as tourism related during the previous year. The Ontario Ministry of Tourism defines tourism as business activity from visitors who have traveled greater than 40km from their place of residence.



*of responding employers reported that at least*  
**50% OF THEIR BUSINESS IN 2019**  
**WAS TOURISM RELATED**

## START-UPS VS. ESTABLISHED

**10%**  
*of businesses identify as a*  
**START-UPS**



**90%**  
*identify as an*  
**ESTABLISHED**  
**BUSINESSES**

## HEAD OFFICE VS. BRANCH

**67%** *of businesses identify as a*  
**HEAD OFFICE**



**24%** *of businesses identify as a*  
**BRANCH**  
**LOCATION**

# WHAT IS IN DEMAND IN THE FOUR COUNTY AREA?

## IN-DEMAND JOBS

When asked which positions were hardest to fill in 2019, the top ten responses are as follows. Servers/bartenders and welders are new to the list this year. These occupations have replaced production workers and nurses, which remain hard-to-fill, but were not identified as frequently in the most recent EmployerOne survey.

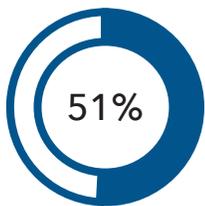
### TOP 10 HARD-TO-FILL JOBS

1. Managers/Directors/Supervisors
2. Chefs/Cooks
3. Labourers
4. Servers/Bartenders
5. Drivers (including AZ)
6. Sales Representatives
7. Dishwashers/Kitchen Support Staff
8. Cleaners/Housekeepers
9. Personal Support Workers
10. Welders

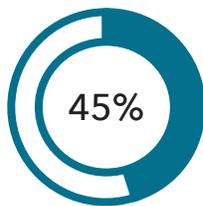
## IN-DEMAND WORKPLACE COMPETENCIES

As in previous years, employers continue to identify the importance of soft skills at all levels of seniority, and across all sectors. The top in-demand competency is dependability, which was reported by over half of responding employers.

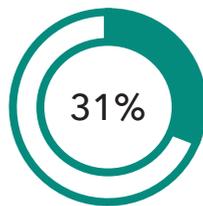
Dependability



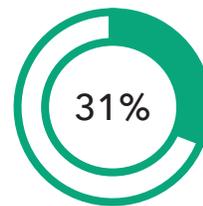
Work Ethic



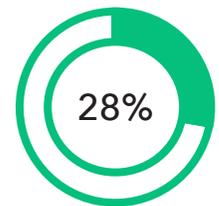
Customer Service



Teamwork

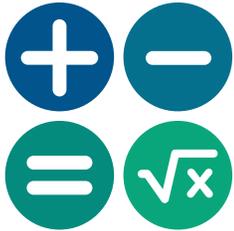


Self-motivated



## IN-DEMAND TECHNICAL SKILLS AND CREDENTIALS

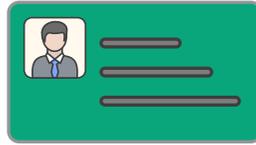
For the first time in January 2020, the EmployerOne survey asked employers which technical skills and credentials are most in-demand in their workplaces. By far, the most in-demand technical skills reported by surveyed employers were math skills and computer skills. These were followed by: driver's license (including AZ certification), safe food handling and SmartServe.



basic math skills



computer literacy



Driver's license (including AZ)



Safe food handling



SmartServe

## AVAILABILITY OF QUALIFIED WORKERS

When employers were asked how they rate the availability of qualified workers in the four county area, they responded as follows:



EmployerOne 2020 results show a slight increase in the percentage of surveyed employers rating the availability of qualified workers as either excellent or good. However, overall, employers continue to report significant dissatisfaction with the availability of qualified workers across our region. Seventy-five percent of this year's surveyed employers rate the availability of qualified workers as fair or poor, suggesting that the skills of job seekers in our region do not match the qualifications desired by local employers.

### AVAILABILITY OF QUALIFIED WORKERS BY TOP SECTOR

The percentage of employers who rate the availability of qualified workers as either excellent or good increased between 2019 and 2020 in most of our top sectors, with the exception of healthcare and social assistance.

SECTOR	EXCELLENT - GOOD	
AGRICULTURE	19%	<i>Increase</i>
CONSTRUCTION	9%	<i>Increase</i>
HEALTHCARE AND SOCIAL ASSISTANCE	9%	<i>Decrease</i>
MANUFACTURING	15%	<i>Increase</i>
WHOLESALE AND RETAIL TRADE	2%	<i>Increase</i>

(Increase/Decrease compared to 2019)

## AVAILABILITY OF QUALIFIED WORKERS BY BUSINESS SIZE

The highest percentage of employers who rate the availability of qualified workers as excellent or good are businesses with between 1 and 4 employees. However, there does not appear to be a linear correlation between business size and how employers responded to this question. Overall, we see a higher percentage of employers in nearly all employee size ranges rating the availability of qualified workers as excellent or good, compared with the previous year.

BUSINESS SIZE	EXCELLENT - GOOD	
1 - 4	32%	<i>Increase</i>
5 - 9	28%	<i>Increase</i>
10 - 19	23%	<i>Increase</i>
20 - 49	18%	<i>Decrease</i>
50 - 99	28%	<i>Increase</i>
100 +	18%	<i>Increase</i>

(Increase/Decrease compared to 2019)

# EMPLOYMENT DYNAMICS IN 2019

## HIRING

Eighty-seven percent of surveyed employers hired at least one employee in 2019, which is a slight increase from last year in which 84% of employers reported hiring during the previous year.

Compared to last year, the hiring dynamics differ slightly; most notably, a significantly greater percentage of hires reported in 2019 were seasonal jobs, when compared to the previous year.

### HIRES IN 2019

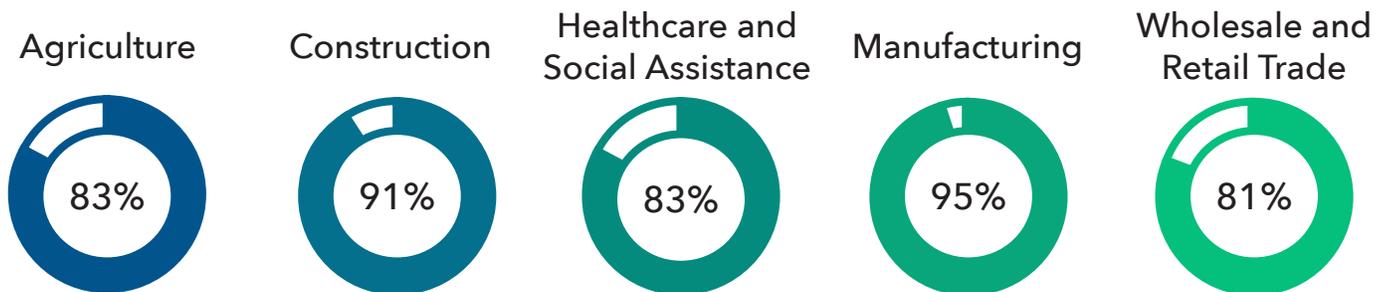
FULL-TIME	43%	<i>Decrease</i>
PART-TIME	15%	<i>Slight Decrease</i>
CONTRACT	6%	<i>No Change</i>
SEASONAL	36%	<i>Increase</i>

(Increase/Decrease compared to previous year)

## HIRING BY TOP SECTOR

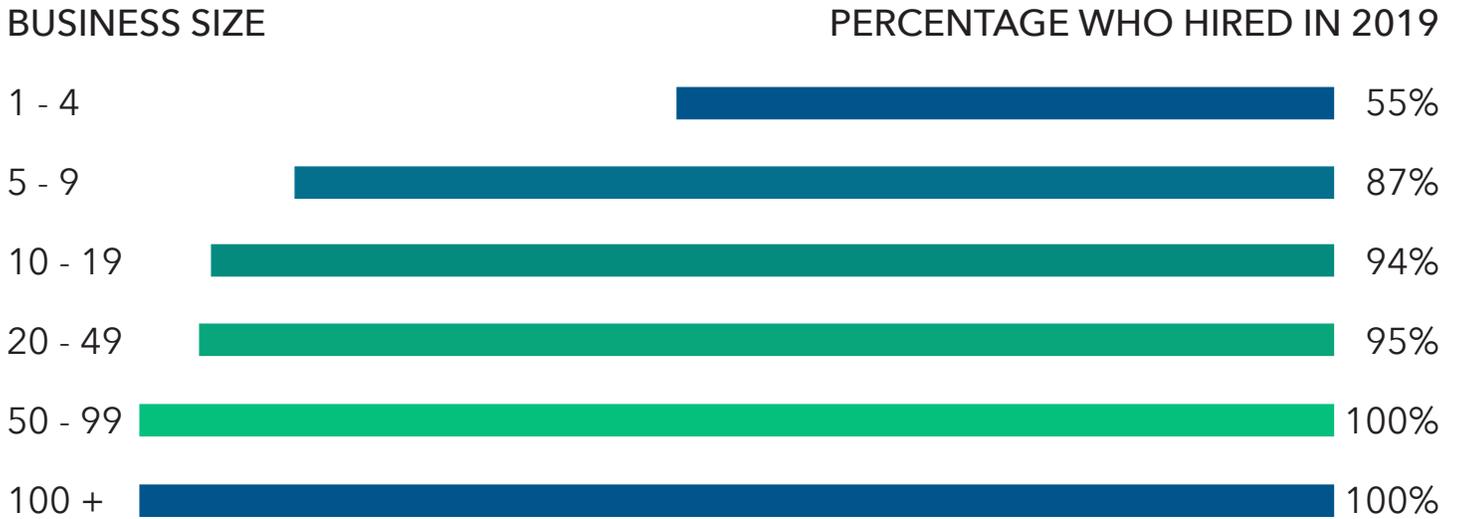
The percentage of businesses in our top five sectors who reported hiring during the previous year ranged from a low of 81% in wholesale and retail trade, to a high of 95% in manufacturing.

### PERCENTAGE WHO HIRED IN 2019



## HIRING BY BUSINESS SIZE

The percentage of businesses who reported hiring during the previous year does appear to correlate with business size. Businesses with more employees were significantly more likely to report hiring at least one employee than those with fewer employees.



## SEPARATIONS

Seventy-six percent of surveyed employers experienced at least one separation in 2019, which is an increase from last year in which 71% of employers reported at least one separation during the previous year.

Compared to last year, the hiring dynamics differ somewhat; most notably, a significantly lower percentage of temporary layoffs were reported in 2019, when compared to the previous year.

There was no change in the percentage of quits, which has remained relatively constant for several years. In a market with ongoing labour shortages, we continue to see a high percentage of workers who separate from their employers, doing so voluntarily.

### SEPARATIONS IN 2019

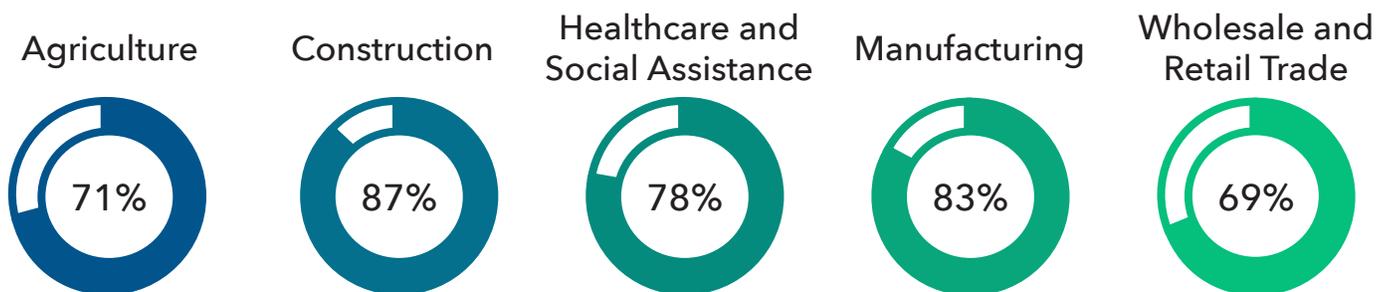
QUITS	51%	<i>No Change</i>
RETIREMENTS	4%	<i>Slight Decrease</i>
TEMPORARY LAYOFFS	11%	<i>Decrease</i>
PERMANENT LAYOFFS	21%	<i>Increase</i>
DISMISSALS	13%	<i>Slight Decrease</i>

(Increase/Decrease compared to previous year)

## SEPARATIONS BY TOP SECTOR

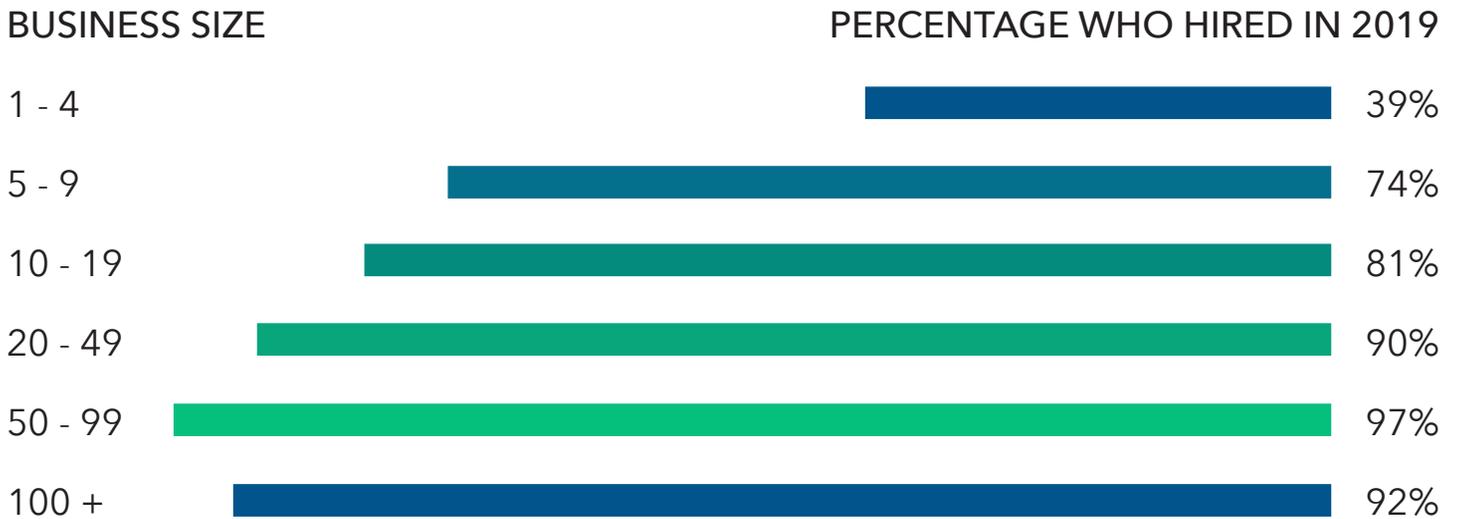
The percentage of businesses in our top five sectors who experienced at least one separation during the previous year ranged from a low of 69% in wholesale and retail trade to a high of 87% in construction.

### PERCENTAGE WHO EXPERIENCED SEPARATIONS IN 2019



## SEPARATIONS BY BUSINESS SIZE

The smallest surveyed businesses – those with between one and four employees – were the least likely to report separations. The majority of businesses in the four county region are in this size range. As employee turnover can be particularly onerous for small employers without dedicated recruitment and hiring resources, fewer separations for smaller employers is a positive survey finding.



# RETENTION STRATEGIES AND HIRING CHALLENGES

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## RETENTION CONCERNS AND STRATEGIES

For the past two years, the Planning Board has undertaken several projects in order to understand the factors contributing to why employees choose to stay in or leave their jobs. The 2018 Employee Survey<sup>1</sup> collected responses from 758 workers and job seekers in our region, and asked them about their experiences in the labour market. Questions concerning retention were asked in order to understand why employees have quit jobs. The top reported reasons were:

- I experienced harassment or bullying (37%)
- My schedule was unpredictable (31%)
- I found a different job that paid more (26%)
- I was not using my skills/experience/education/training in my work (26%)
- There were no opportunities for variety at work (26%)

The 2020 Employee Retention Toolkit summarizes information collected from interviews with both employers and job seekers concerning best practices for employee retention. Some of the key retention strategies identified through this research were as follows:

- Strong communication between employees at all levels of seniority;
- Willingness to hear suggestions and incorporate changes where possible;
- Compensation – including wages, benefits “perks” – beyond minimum required for the desired skillset;
- Clear workplace policies, and fair implementation of these policies;
- Giving employees as much autonomy and flexibility as possible;
- Offering ongoing training/advancement opportunities;
- Workplaces that exemplify values such as: kindness, empathy, understanding and compassion.

As a follow-up to the above projects, the EmployerOne 2020 survey asked employers about their concerns with workplace retention for the first time. Sixty-two percent of surveyed employers indicated that retention is a concern. Employers were then asked what they are presently doing to encourage retention. The top five responses were as follows:

REGULAR INCREASES IN SALARY AND BENEFITS	62%
RECOGNITION FOR SERVICE AND/OR OUTSTANDING WORK	49%
EMPLOYEE “PERKS” (i.e., discounts on merchandise, company-branded clothing, staff celebrations, etc.)	43%
TRAINING OPPORTUNITIES	36%
JOB FLEXIBILITY (i.e., work from home arrangements, flex time, job sharing)	32%

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<sup>1</sup> Four County Labour Market Planning Board, Employee Survey 2018, (<http://www.planningboard.ca/reports/employeesurvey/>)

## RETENTION CONCERNS BY TOP SECTOR

When asked if retention is a concern, responses for our top five sectors ranged from a low of 52% of healthcare businesses to a high of 70% for construction businesses.

### PERCENTAGE WHO REPORTED RETENTION IS A CONCERN FOR THEIR ORGANIZATION



## RETENTION CONCERNS BY BUSINESS SIZE

When analyzed by business size, there appears to be a correlation between the number of employees in an organization, and whether or not business owners and managers believe retention is a concern. Businesses with more employees (over 20) were more likely to report that retention is a concern than businesses with fewer employees (under 20).

### PERCENTAGE WHO REPORTED RETENTION IS A CONCERN FOR THEIR ORGANIZATION



## HARD-TO-FILL POSITIONS

Sixty-three percent of surveyed employers reported hard-to-fill positions in 2019. This is a decrease from last year in which 72% of employers reported the same.

When asked how long they have been trying to fill these positions, there was a decrease in the percentage of employers who have been trying to fill positions for over a year. In 2019, 37% of employers reported that they have spent over a year trying to fill positions, while the 2020 survey results indicate that 27% of employers have spent over a year looking for employees.

LENGTH OF TIME	2020	
LESS THAN 3 MONTHS	15%	<i>Slight Increase</i>
3 TO 6 MONTHS	27%	<i>Slight Decrease</i>
6 TO 9 MONTHS	18%	<i>Increase</i>
9 TO 12 MONTHS	13%	<i>Slight Increase</i>
OVER A YEAR	27%	<i>Decrease</i>

(Increase/Decrease compared to previous year)

## TOP REASONS POSITIONS WERE HARD-TO-FILL

The top reasons for which employers reported that positions were hard-to-fill are as follows. Compared to the previous year, the percentage of employers reporting these top five reasons went down in all categories except technical skills in which there was a slight increase. In 2020, other reasons that were less frequently reported overall were, nevertheless, reported by an increasing number of responding employers. These included: No applicants at all, business difficult to reach without transportation, and an inability to compete with other employers.

REASON	2020	
NOT ENOUGH APPLICANTS	59%	<i>Decrease</i>
LACK OF MOTIVATION	38%	<i>Decrease</i>
LACK OF QUALIFICATIONS	34%	<i>Decrease</i>
LACK OF TECHNICAL SKILLS	28%	<i>Slight Increase</i>
LACK OF WORK EXPERIENCE	26%	<i>Decrease</i>

(Increase/Decrease compared to previous year)

## HARD-TO-FILL POSITIONS BY TOP SECTOR

Hard-to-fill positions are a concern for at least half of responding employers in each of our top sectors. The sectors with the greatest challenges with hard-to-fill jobs are construction (87%) and manufacturing (73%).

### PERCENTAGE WHO REPORTED HARD-TO-FILL POSITIONS IN 2019



When asked how long they have been trying to fill these positions, employers in wholesale and retail trade reported the fewest challenges: only 4% of these employers have been trying to fill positions for over a year. In our remaining top sectors, between 21% (manufacturing) and 45% (construction) of employers reported trying to fill vacancies for a year or more.

### PERCENTAGE WHO SPENT OVER A YEAR TRYING TO FILL THESE POSITIONS



## HARD-TO-FILL POSITIONS BY BUSINESS SIZE

There appears to be a correlation between business size and the percentage of employers who reported hard-to-fill positions during the previous year. Forty percent of businesses between one and four employees experienced hard-to-fill positions. While this is a significant number, 85% of businesses with over 100 employees reported the same.

### PERCENTAGE WHO REPORTED HARD-TO-FILL POSITIONS IN 2019



When asked how long they have been trying to fill hard-to-fill positions, responses do not show a correlation between business size and length of time spent trying to find employees.

### PERCENTAGE WHO SPENT OVER A YEAR TRYING TO FILL THESE POSITIONS



## RECRUITMENT METHODS

While the top five recruitment methods remain unchanged compared to last year, in this year's survey, significantly more employers reported using each of these top recruitment methods. In particular, the percentage of employers who report using social media jumped from 18% to 59% between 2019 and 2020.

RECRUITMENT METHOD	2020
 WORD OF MOUTH	70% <i>Increase</i>
 ONLINE JOB BOARDS	67% <i>Increase</i>
 SOCIAL MEDIA	59% <i>Increase</i>
 COMPANY'S OWN INTERNET SITE	37% <i>Increase</i>
 NEWSPAPER ADS	24% <i>Increase</i>

(Increase/Decrease compared to previous year)

## RECRUITMENT METHODS BY TOP SECTORS

When analyzed by sector, the top three recruitment methods remain the same. However, employers in manufacturing report using online job boards the most frequently, whereas employers in our remaining top sectors use word of mouth as their top recruitment method.

SECTOR	#1 METHOD	#2 METHOD	#3 METHOD
AGRICULTURE			
CONSTRUCTION			
HEALTHCARE AND SOCIAL ASSISTANCE			
MANUFACTURING			
WHOLESALE AND RETAIL TRADE			

## RECRUITMENT METHODS BY BUSINESS SIZE

When analyzed by business size, we see some noticeable differences in top recruitment methods. As business size increases, the percentage of employers who report finding new employees through word of mouth decreases. For businesses with over 100 employees, word of mouth is not one of the top three recruitment tools used. Larger businesses are more likely to use their own company website to recruit new employees. This is a top recruitment method for businesses with over 50 employees, yet not for those with fewer than 50 employees.

BUSINESS SIZE	#1 METHOD	#2 METHOD	#3 METHOD
1 - 4			
5 - 9			
10 - 19			
20 - 49			
50 - 99			
100 +			

## ANTICIPATED HIRES

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Eighty-two percent of surveyed employers plan to hire in 2020, representing a slight increase from last year's survey results in which 80% of employers reported that they anticipated hiring in the upcoming year.

### TOP ANTICIPATED HIRES

When asked which positions employer plan to fill in 2020, the top ten responses are as follows. Filling current vacancies, expansions, and retirements were listed as the top reasons for which new employees will be needed in the upcoming year.

While the majority of anticipated hires are the same as those identified as hard-to-fill positions earlier (p. 10), the two highlighted occupations are not the same. The remaining occupations appear on both lists.

#### TOP 10 ANTICIPATED HIRES

1. Chefs/Cooks

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2. Labourers

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3. Servers/Bartenders

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4. **Retail/Cashiers**

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5. Sales Representatives

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6. Drivers (including AZ)

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7. **Administrative Assistants**

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8. Cleaners/Housekeepers

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9. Managers/Directors/Supervisors

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10. Welders

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## ANTICIPATED HIRES BY TOP SECTORS

The majority of surveyed employers in each of our top five sectors plan to hire in the upcoming year. The percentage of employers who plan to hire in 2020 ranges from a low of 71% in wholesale and retail trade to a high of 100% in manufacturing.

### PERCENTAGE WHO PLAN TO HIRE IN 2020



## ANTICIPATED HIRES BY BUSINESS SIZE

When analyzed by business size, there is a correlation between the number of employees and the likelihood that an employer believes they will need to hire at least one employee in 2020. As business size increases, the percentage of employers responding that they plan to hire next year also increases.

### PERCENTAGE WHO PLAN TO HIRE IN 2020



# SUCCESSION PLANNING

Thirty-eight percent of surveyed employers responded that their organization has a workforce succession plan in place to deal with projected growth or retirements over the next three to five years. Sixty-two percent responded that they do not have such a plan in place.

## SUCCESSION PLANNING BY TOP SECTORS

When analyzed by sector, employers in healthcare and manufacturing were the most likely to report that their organizations have a succession plan in place. Those in wholesale and retail trade were the least likely to report this.

### PERCENTAGE WHO HAVE A SUCCESSION PLAN IN PLACE



## SUCCESSION PLANNING BY BUSINESS SIZE

Larger businesses were the most likely to report that they have succession plans in place; whereas those with fewer than ten employees were the least likely to report that their business has a succession plan.

### PERCENTAGE WHO HAVE A SUCCESSION PLAN IN PLACE



## COMMENTS FROM EMPLOYERS

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As in previous years, employers responding to this year's survey identified broad challenges resulting from a tight labour market. The top three challenges listed were:

- Overall difficulties attracting employees to rural regions;
- housing shortages;
- transportation challenges.

As employers have reported in past years, this year's survey also included numerous comments concerning lack of soft skills – in particular, motivation and reliability – held by job seekers in the region. As identified earlier (top reasons positions were hard-to-fill, p. 20), employers are focused on soft skills as crucial for workplace success in all sectors. Ongoing attention to soft skills training remains a concern for both employers and job seekers in the four county region.

## SOFT SKILLS DEVELOPMENT, TECHNICAL TRAINING, AND SERVING LABOUR MARKET NEEDS

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Since 2017 the Planning Board has offered connect2SKILLS programs (<http://www.planningboard.ca/connect2skills>) through the government-funded *SkillsAdvance* Ontario (SAO) program (<http://www.tcu.gov.on.ca/eng/eopg/programs/sao.html>). This program currently serves the needs of highly-barriered job seekers across the four county region, and helps prepare them for jobs in manufacturing (Huron and Perth) and hospitality and tourism (Bruce and Grey). With input from local employers, connect2SKILLS includes industry-specific curriculum designed to teach the precise skills needed for entry-level positions in these industries. Additionally, there is a significant focus on the ongoing development of soft skills which employers continue to identify as key to workplace success. A supported job placement, and follow-up with all participants for at least a year has contributed to the success of this program in helping marginalized individuals achieve their employment goals in industries in our region with particularly high labour shortages. Since its inception in 2017 connect2SKILLS has served over 200 clients and connected them with over 25 employers.

Data from EmployerOne continues to inform applications and funding proposals for needed projects like connect2SKILLS, as the four county region continues to struggle with a lack of workers with the skills required for sustained employment. For more information about these programs, please contact Gemma Mendez-Smith, Executive Director, at [executivedirector@planningboard.ca](mailto:executivedirector@planningboard.ca).

## CONCLUSION

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In January 2020, EmployerOne was conducted for the sixth time in the four county area. Labour shortages in our region and associated challenges for employers such as hard-to-fill positions, prolonged vacancies and recruitment challenges continue to dominate responses from employers in all industries. Six years of data have given us the ability to look at trends, as well as anticipate changes and potential labour needs in the future. Given this, the Planning Board will not undertake an EmployerOne survey in 2021. Instead, we will focus on projects addressing precarious employment, workforce retention and other critical issues in our labour market, in order to research and address the challenges employers have identified through their ongoing participation in this survey. Thank you to all employers and community partners who have promoted and completed this survey over the years; the success of this project would not have been possible without your ongoing support. For more information about current and future projects, please see our website at: [www.planningboard.ca](http://www.planningboard.ca).



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