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Acknowledgements

We are grateful for the participation of our local workforce and thank both employees and job seekers who took the time to share their thoughts with us in the 2023 Employee Survey.

We would also like to acknowledge and thank our Advisory Committee partners for their support and contributions to this project.

The success of this project is a direct result of collaborative efforts and would not be possible without your ongoing participation. We believe that up-to-date information on concerns of our local workforce is crucial to understanding the challenges our workers are facing, thus supports employers and community stakeholders in their workforce attraction and retention strategies.

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Background & Introduction

The Employee survey was last launched in 2018 and the landscape of our local workforce has changed significantly post pandemic. We felt it was time to hear from our local workforce again. In 2023, The Four County Labour Market Planning Board (FCLMPB) conducted an anonymous and confidential survey of employees and job seekers within the Stratford-Bruce Peninsula Economic Region which includes Bruce, Grey, Huron and Perth Counties.

The survey was launched on September 1, 2023 and closed November 1, 2023. With the support of local employees, job seekers, and our advisory partners we successfully received 777 surveys.

Over the last five years, labour market conditions in the region have undergone significant changes. In 2022, the region's job vacancies hit a record high, and observed increasing employee turnover across many sectors. As reported in the 2023 EmployerOne Survey, separations due to quits went up from about 47% to 57%. In a region with ongoing low unemployment and increasing job vacancies, effective retention and attraction strategies are more important than ever.

By engaging with the local workforce through this survey it allows us to get a sufficient sample size of what our local workforce is saying. This allows us to enhance and support the current efforts that local employers are implementing in their attraction and retention strategies.

This survey is intended as the first step towards having a better understanding of our local workforce needs from the perspective of an employee or job seeker. The findings in this report are aimed at helping to enhance strategies that encourage human connections, and unleash employee productivity which can increase retention and enhance an organizations ability to attract a new workforce.



Survey Collection and Methodology

The 2023 Survey goal was to survey 800 employees and job seekers in the Stratford-Bruce Peninsula Economic Region. 777 (97.1% target) survey responses were successfully collected with a completion rate of 77.1%. To achieve statistical significance at a 95% confidence level based on the regional labour force and unemployed population sizes reported in the 2021 Census, the 2023 Employee Survey was designed to reach out to a minimum of 400 employees within the region and a minimum of 100 employee responses from each county to reach a 90% confidence level.

This year, the survey consisted of five common questions for employees and job seekers; 11 to 12 employee-specific questions; and 7 to 8 job seeker specific questions. The survey was conducted online only. In order to maximize the geographical and demographical catchments of the survey, weekly radio advertising, social media boosts (i.e. Facebook, LinkedIn and Instagram), newsletter, and online advertising campaigns were used. In addition to these campaigns the survey was promoted and shared by our Advisory committee members to their networks and contacts.

Report Layout

Based on the separate questions and responses from employees and job seekers, this final report is broken down into two results sections; Employees and Job Seekers.

Our analysis of employee responses covers; employees' demographics by place of work and residence, age and sector; important factors for employment decisions; important factors in how they feel about their current employment; and sector highlights.

The second part of the report covers an analysis on profiles of job seekers; by age, place of residence and sectors, followed by important reasons why they left their positions, what is important for them in their job searches and what sectors they are currently interested in.

Supporting documents and are listed in the appendix.



Employee Responses

In the 2023 Employee Survey, we collected 519 responses from employees working within the Stratford-Bruce Peninsula Economic Region. The survey completion rate was 78.6%.

Employee Respondents by Location of Employment

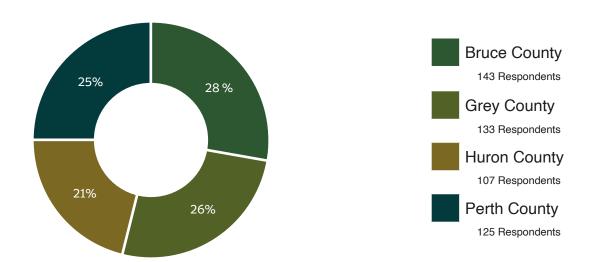


Table 1 - Respondents by Location of Employment

Commuting Characteristics of Employees

When asked how long does their trip to work usually last, about 80% employee respondents indicated that commuting took less than 30 minutes, compared with about 62% in Ontario as indicated in the 2021 Census

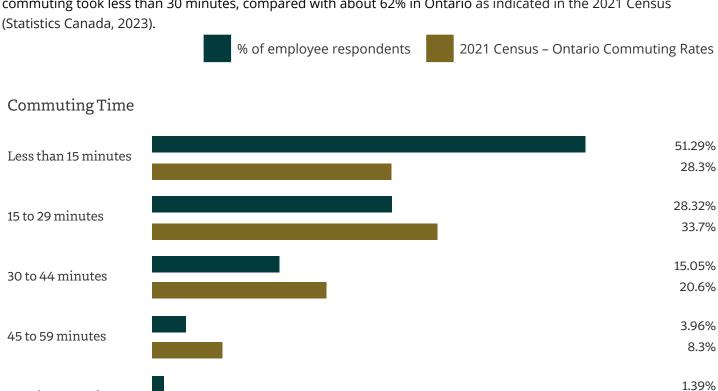


Table 2 - Commuting Characteristics of Employees

60 minutes and over

The majority of employee respondents live and work in the same county. Perth had the highest percentage of respondents who live and work within the same county at 93.6%, but also had the highest percentage of 6.4% respondents who indicated they live outside of the region. Bruce had the highest number of employee respondents who indicated they work in Bruce but live in other counties at 24.5%, and Perth had no respondents living in other counties.

% Living in	Working in Bruce	Working in Grey	Working in Huron	Working in Perth
Bruce	75.5%	14.3%	5.6%	0%
Grey	16.1%	85%	0%	0%
Huron	7.7%	0%	82.2%	0%
Perth	.07%	.80%	10.3%	93.6%
Other	0%	0%	1.9%	6.4%

Table 3 - Counties living in vs working in

9.1%

Employee Attraction & Retention Factors

Previous studies suggest that five of the most common attraction & retention strategies include: employment compensation, organizational environment (culture), and opportunities for advancement (training), workplace relationships and job security (See for example, Dietz & Zwick, 2021; Ashraf & Oraby, 2022; Huang et al., 2006). Survey respondents were asked to rate their responses from most important to least important.

The overall importance of each employment factor was calculated using a weighted scoring calculation. The higher the final score of an employment factor, the more important it was considered as a factor in their employment decisions.

Employment Factors	Ranked Weighted Score Most Important to Least Important
Hourly pay or Salary (Wages)	#1
Other Compensation (Dental or Medical Benefits, Bonus, Vacation time)	#2
Positive work culture (support and respect from co-workers and management, my efforts are recognized)	#3
Hours of work (Flexible schedule, notice of schedule, remote work, time off)	#4
Location of Employment (Close to home or daycare, public transportation route)	#5
Housing (Attainable and Affordable)	#6
Ability to use my skills, or education in current position	#7
Career development opportunities (i.e. on-the-job training, job rotation opportunities, promotion)	#8
Safe work environment (procedures for physical or mental well-being)	#9
Availability of public transport	#10
Physical Work environment (inside or outside, dusty or dirty, cold or hot environments)	#11
Other (Please specify)	#12

Table 4 – Employment Factors – Weighted Score (See appendix)

It is clear that wages and compensation are at the top of the list for most respondents. It is important to note that the 2023 living wage rate for the Grey Bruce Perth Huron Simcoe region, which includes the Stratford-Bruce Peninsula Economic Region released by the Ontario Living Wage Network is \$22.75 (Coleman, 2023).

Traditionally, wage increment or other monetary compensations are the most commonly used strategies when trying to attract or retain employees. That said, not all organizations can offer wages at or above the latest suggested living wage level, and other factors should be considered when attracting and retaining workers.

The varying responses we collected and previous research on workforce development show that retention and attraction strategies are multi-folded and complex. In short, our findings revealed that employees don't take <u>only</u> wage or financial rewards <u>into account</u> when making employment decisions. While competitive wage remains critical, non-monetary employment compensation, positive work culture, and hours of work are rated by our respondents as the top four most important factors to their employment.

Furthermore, when we look past the monetary needs, we also found that employees from different age cohorts have varied priorities. Middle-age to older workers focus more on work-life balance and long-term career achievement, thus placing greater importance on location of employment, hours of work and ability to use their skills. On the other hand, the younger workforce are more concerned about housing and transportation costs when determining what positions they will accept.

In the next section we will explore those differences in age cohorts in detail.



Employee Responses by Age Cohorts

On the understanding that organizations have different distributions of employees from diverse age groups, we have sub-categorized survey responses by age cohorts.

While our workforce do share common concerns, we also found notable differences across age cohorts. For example, youth have ranked housing as more of a need than older workers. The latter are more likely already established in the housing market but are affected by other factors such as utilizing their skills, and flexible schedules.

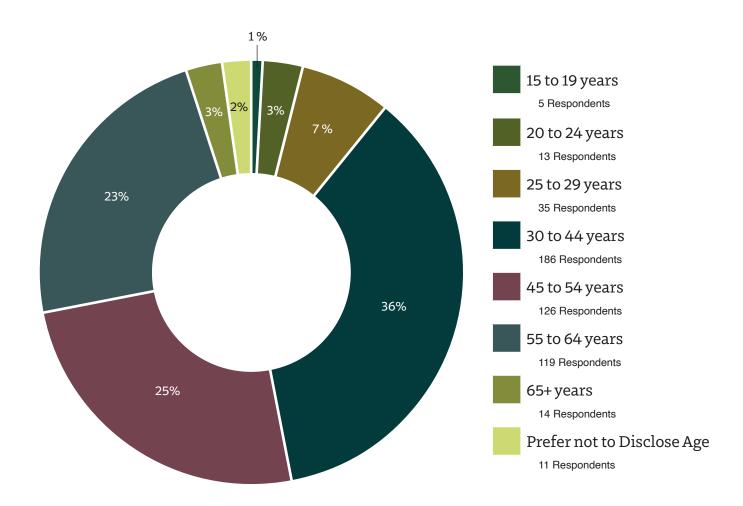


Table 5 - *Note - ages were collected in increments of 5 years but combined in some tables for reporting

Note: Due to the small number or respondents aged 15 – 19, our breakdowns of analysis do not include this age cohort.

Young Workers - 20s

Affordable and attainable housing is ranked the fifth most important factor among the 20-24 cohort, and the second frequently selected "most important" employment factor among respondents aged 25-29.

Employment Factor - 20s	Ranking of Weighted Score Most Important to Least Important
Hourly pay or Salary (Wages)	#1
Other Compensation (Dental or Medical Benefits, Bonus, Vacation time)	#2
Positive work culture (support and respect from co-workers and management, my efforts are recognized)	#3
Hours of work (Flexible schedule, notice of schedule, remote work, time off)	#4
Housing (Attainable and Affordable)	#5
Availability of public transport	#6
Location of Employment (Close to home or daycare, public transportation route)	#7
Ability to use my skills, or education in current position	#8
Safe work environment (procedures for physical or mental well-being)	#9
Career development opportunities (i.e. on-the-job training, job rotation opportunities, promotion)	#10
Physical Work environment (inside or outside, dusty or dirty, cold or hot environments)	#11
Other	#12

Table 6 – Age Cohort 20s

Major Working Age Groups - 30s

Major working age groups (i.e. those in their 30s and 40s) value work culture and flexibility of work arrangements when considering their employment. Workers in their 30s, who are looking for a more promising long-term career and likely at the stage of developing a new family, are particularly concerned about positive work culture and hours of work. Affordable and attainable housing and career development opportunities also ranked higher by respondents in their 30s.

Employment Factor – 30s	Ranking of Weighted Score Most Important to Least Important
Hourly pay or Salary (Wages)	#1
Positive work culture (support and respect from co-workers and management, my efforts are recognized)	#2
Hours of work (Flexible schedule, notice of schedule, remote work, time off)	#3
Other Compensation (Dental or Medical Benefits, Bonus, Vacation time)	#4
Location of Employment (Close to home or daycare, public transportation route)	#5
Housing (Attainable and Affordable)	#6
Career development opportunities (i.e. on-the-job training, job rotation opportunities, promotion)	#7
Safe work environment (procedures for physical or mental well-being)	#8
Availability of public transport	#9
Ability to use my skills, or education in current position	#10
Physical Work environment (inside or outside, dusty or dirty, cold or hot environments)	#11
Other	#12

Table 7 - Age Cohort 30s

Major Working Age Groups - 40s

Although the top four important employment factors selected by the 40-44 and 45-49 cohorts are identical to the overall rankings, it is noteworthy that more respondents rated positive work culture as the "most important" employment factor, surpassing other employment benefits. Ability to use skills or education at work and career development opportunities are ranked equal sixth by workers aged 40-49.

Employment Factor – 40s	Ranking of Weighted Score Most Important to Least Important
Hourly pay or Salary (Wages)	#1
Other Compensation (Dental or Medical Benefits, Bonus, Vacation time)	#2
Positive work culture (support and respect from co-workers and management, my efforts are recognized)	#3
Hours of work (Flexible schedule, notice of schedule, remote work, time off)	#4
Location of Employment (Close to home or daycare, public transportation route)	#5
Ability to use my skills, or education in current position	#6
Career development opportunities (i.e. on-the-job training, job rotation opportunities, promotion)	#7
Housing (Attainable and Affordable)	#8
Availability of public transport	#9
Physical Work environment (inside or outside, dusty or dirty, cold or hot environments)	#10
Safe work environment (procedures for physical or mental well-being)	#11
Other	#12

Table 8 - Age Cohort 40s

Health and Work Life Balance - 50s

Similarly, 50-54 and 55-59 cohorts also valued work-life balance (as expressed by hours of work and location of employment) and career development opportunities. However, it is noteworthy that working in an environment with procedures protecting their physical or mental well-being. Safe working environment is ranked equally as important as career development opportunities.

Employment Factor – 50s	Ranking of Weighted Score Most Important to Least Important
Hourly pay or Salary (Wages)	#1
Other Compensation (Dental or Medical Benefits, Bonus, Vacation time)	#2
Positive work culture (support and respect from co-workers and management, my efforts are recognized)	#3
Hours of work (Flexible schedule, notice of schedule, remote work, time off)	#4
Location of Employment (Close to home or daycare, public transportation route)	#5
Career development opportunities (i.e. on-the-job training, job rotation opportunities, promotion)	#6
Safe work environment (procedures for physical or mental well-being)	#7
Ability to use my skills, or education in current position	#8
Housing (Attainable and Affordable)	#9
Availability of public transport	#10
Physical Work environment (inside or outside, dusty or dirty, cold or hot environments)	#11
Other	#12

Table 9 – Age Cohort 50s

Safe Work Environment & Utilizing Skills - 60s+

Older workers aged 60-64 and 65 years and over rated a positive work culture more important than other employment benefits. Also, the seniors are more concerned about the ability to use their skills or education at work, as well as having a safe working environment. With our older workers appreciating a supportive working environment that allows them to utilize their experiences and skills, workplace or skills-related mentorship connecting experienced workers with the younger workforce may be a potential workforce development strategy to fully unleash our labour force capacity.

Utilizing our aging workforce in positions where we can retain and transfer their knowledge to train new employees could be an opportunity to close the gap where employers feel unsatisfied with the supply of qualified workers.

Employment Factor - 60s +	Ranking of Weighted Score Most Important to Least Important
Hourly pay or Salary (Wages)	#1
Other Compensation (Dental or Medical Benefits, Bonus, Vacation time)	#2
Positive work culture (support and respect from co-workers and management, my efforts are recognized)	#3
Hours of work (Flexible schedule, notice of schedule, remote work, time off)	#4
Location of Employment (Close to home or daycare, public transportation route)	#5
Ability to use my skills, or education in current position	#6
Safe work environment (procedures for physical or mental well-being)	#7
Physical Work environment (inside or outside, dusty or dirty, cold or hot environments)	#8
Career development opportunities (i.e. on-the-job training, job rotation opportunities, promotion)	#9
Availability of public transport	#10
Housing (Attainable and Affordable)	#11
Other	#12

Table 10 - Age Cohort 60s+

Employee Responses by Sector

It is clear that wages and compensation are at the top of the list for most respondents.

It is important to note that the 2023 living wage rate for the Grey Bruce Perth Huron Simcoe region, which includes the Stratford-Bruce Peninsula Economic Region released by the Ontario Living Wage Network is \$22.75 (Coleman, 2023).

We understand that not all sectors and occupations can offer this wage level; therefore other factors which complement worker's working and living experiences should be considered as additional tools when attracting and retaining workers.

Employee Satisfaction with Employment Compensation and Benefits

Sector	% Strongly Agree	% Agree	% Neither Agree nor Disagree	% Disagree	% Strongly Disagree
Utilities	35.3%	35.3%	0.0%	17.6%	11.8%
Information, culture and recreation ¹	17.4%	39.1%	4.3%	34.8%	4.3%
Public administration	6.3%	37.5%	12.5%	28.1%	15.6%
Professional, scientific and technical services	14.3%	28.6%	14.3%	7.1%	35.7%
Agriculture & Mining, quarrying, oil and gas extraction 4	9.7%	32.3%	16.1%	32.3%	9.7%
Educational services	5.6%	30.6%	8.3%	33.3%	22.2%
Finance, insurance, real estate, rental and leasing ⁵	5.1%	28.8%	11.9%	30.5%	23.7%
Construction	5.6%	27.8%	5.6%	33.3%	27.8%
Manufacturing	3.8%	24.5%	24.5%	32.1%	15.1%
Accommodation and food services	11.1%	16.7%	27.8%	19.4%	25.0%
Health care and social assistance	6.0%	20.2%	19.0%	32.1%	22.6%
Wholesale and retail trade ³	6.0%	18.0%	14.0%	38.0%	24.0%

Business, building and other support services ²	11.1%	11.1%	16.7%	33.3%	27.8%
Other services (except public administration)	0.0%	21.7%	17.4%	39.1%	21.7%
Transportation and warehousing	6.3%	12.5%	37.5%	18.8%	25.0%

Table 15 - Employee - Satisfaction with compensation and benefits by Sector

The high percentages of intended quits in Accommodation, Health care and social assistance, Educational services and Transportation and warehousing not only align with the recorded high job vacancies in these sectors, but also suggest a potential shrinkage of workforce in these sectors.



Employment Status Responses

Sector (NAICS 2-Digit)	Currently or will be looking in the next 12 months		I plan to stay in my current position for the next 12 months	I may leave the workforce in the next 12 months
Accommodation and food services	27.8%	38.9%	27.8%	5.6%
Health care and social assistance	25.0%	40.5%	31.0%	3.6%
Educational services	19.4%	27.8%	44.4%	8.3%
Transportation and warehousing	18.8%	50.0%	25.0%	6.3%
Professional, scientific and technical services	14.3%	42.9%	21.4%	21.4%
Finance, insurance, real estate, rental and leasing ⁵	14.3%	50.0%	28.6%	7.1%
Other services (except public administration)	13.0%	52.2%	34.8%	0.0%
Agriculture & Mining, quarrying, oil and gas extraction 4	12.9%	32.3%	48.4%	6.5%
Public administration	12.5%	34.4%	50.0%	3.1%
Utilities	11.8%	29.4%	58.8%	0.0%
Business, building and other support services ²	11.1%	61.1%	22.2%	5.6%
Construction	11.1%	55.6%	33.3%	0.0%
Wholesale and retail trade ³	10.0%	50.0%	40.0%	0.0%
Information, culture and recreation ¹	8.7%	26.1%	52.2%	27.7%
Manufacturing	7.6%	54.7%	34.0%	3.8%

Table 11 – Employee Retention Responses by Sector

Constructive Feedback at Work

Sector	% Strongly Agree	% Agree	% Neither Agree nor Disagree	% Disagree	% Strongly Disagree
Transportation and warehousing	6.3%	31.3%	43.8%	12.5%	6.3%
Agriculture & Mining, quarrying, oil and gas extraction 4	9.7%	48.4%	25.8%	9.7%	6.5%
Information, culture and recreation ¹	8.7%	52.2%	17.4%	8.7%	13.0%
Accommodation and food services	11.1%	30.6%	36.1%	19.4%	2.8%
Public administration	6.3%	34.4%	28.1%	15.6%	15.6%
Manufacturing	5.7%	32.1%	30.2%	18.9%	13.2%
Wholesale and retail trade ³	6.0%	28.0%	34.0%	22.0%	10.0%
Business, building and other support services ²	11.1%	44.4%	16.7%	16.7%	11.1%
Finance, insurance, real estate, rental and leasing ⁵	6.8%	28.8%	32.2%	20.3%	11.9%
Utilities	11.8%	41.2%	17.6%	17.6%	11.8%
Educational services	5.6%	27.8%	30.6%	22.2%	13.9%
Construction	16.7%	33.3%	22.2%	16.7%	11.1%
Professional, scientific and technical services	28.6%	21.4%	28.6%	21.4%	0.0%
Health care and social assistance	10.7%	20.2%	27.4%	23.8%	17.9%
Other services (except public administration)	17.4%	26.1%	13.0%	30.4%	13.0%

Table 12 – Employee - Constructive Feedback Responses by Sector

Supportive Supervision and Co-workers

Sector	% Strongly Agree	% Agree	% Neither Agree nor Disagree	% Disagree	% Strongly Disagree
Transportation and warehousing	12.5%	68.8%	6.3%	12.5%	0.0%
Business, building and other support services ²	22.2%	50.0%	22.2%	0.0%	5.6%
Manufacturing	13.2%	49.1%	22.6%	9.4%	5.7%
Agriculture & Mining, quarrying, oil and gas extraction 4	25.8%	58.1%	9.7%	3.2%	3.2%
Wholesale and retail trade ³	14.0%	48.0%	18.0%	12.0%	8.0%
Finance, insurance, real estate, rental and leasing ⁵	16.9%	47.5%	15.3%	13.6%	6.8%
Utilities	35.3%	47.1%	11.8%	5.9%	0.0%
Professional, scientific and technical services	28.6%	50.0%	7.1%	7.1%	7.1%
Public administration	28.1%	37.5%	18.8%	9.4%	6.3%
Construction	22.2%	44.4%	11.1%	11.1%	11.1%
Health care and social assistance	23.8%	32.1%	21.4%	16.7%	6.0%
Accommodation and food services	27.8%	38.9%	13.9%	13.9%	5.6%
Information, culture and recreation ¹	30.4%	34.8%	17.4%	17.4%	0.0%
Other services (except public administration)	26.1%	34.8%	17.4%	17.4%	4.3%
Educational services	22.2%	38.9%	8.3%	19.4%	11.1%

Table 13 – Employee - Supportive Supervisors and Co-workers by Sector

Employee Satisfaction with Career Development Opportunities

Sector	% Strongly Agree	% Agree	% Neither Agree nor Disagree	% Disagree	% Strongly Disagree
Utilities	17.6%	29.4%	35.3%	5.9%	11.8%
Information, culture and recreation ¹	4.3%	39.1%	30.4%	8.7%	17.4%
Professional, scientific and technical services	14.3%	28.6%	42.9%	7.1%	7.1%
Agriculture & Mining, quarrying, oil and gas extraction 4	22.6%	19.4%	35.5%	16.1%	6.5%
Educational services	13.9%	27.8%	16.7%	33.3%	8.3%
Public administration	6.3%	31.3%	28.1%	12.5%	21.9%
Health care and social assistance	10.7%	25.0%	19.0%	23.8%	21.4%
Accommodation and food services	5.6%	27.8%	30.6%	25.0%	11.1%
Business, building and other support services ²	0.0%	33.3%	38.9%	16.7%	11.1%
Construction	16.7%	16.7%	27.8%	22.2%	16.7%
Finance, insurance, real estate, rental and leasing ⁵	8.5%	20.3%	33.9%	22.0%	15.3%
Other services (except public administration)	4.3%	21.7%	21.7%	30.4%	21.7%
Transportation and warehousing	0.0%	25.0%	31.3%	31.3%	12.5%
Manufacturing	3.8%	18.9%	39.6%	24.5%	13.2%
Wholesale and retail trade ³	6.0%	16.0%	38.0%	26.0%	14.0%

Supportive Organization for Employee Schedule Changes

Sector	% Strongly Agree	% Agree	% Neither Agree nor Disagree	% Disagree	% Strongly Disagree
Professional, scientific and technical services	64.3%	14.3%	7.1%	7.1%	7.1%
Finance, insurance, real estate, rental and leasing ⁵	30.5%	45.8%	16.9%	5.1%	1.7%
Wholesale and retail trade ³	26.0%	50.0%	18.0%	4.0%	2.0%
Agriculture & Mining, quarrying, oil and gas extraction 4	48.4%	25.8%	16.1%	3.2%	6.5%
Construction	22.2%	50.0%	11.1%	11.1%	5.6%
Business, building and other support services ²	27.8%	44.4%	22.2%	0.0%	5.6%
Public administration	25.0%	40.6%	6.3%	21.9%	6.3%
Information, culture and recreation ¹	8.7%	56.5%	17.4%	8.7%	8.7%
Utilities	17.6%	47.1%	11.8%	17.6%	5.9%
Transportation and warehousing	18.8%	43.8%	37.5%	0.0%	0.0%
Other services (except public administration)	21.7%	39.1%	17.4%	21.7%	0.0%
Accommodation and food services	25.0%	30.6%	16.7%	11.1%	16.7%
Manufacturing	26.4%	26.4%	22.6%	13.2%	11.3%
Health care and social assistance	19.0%	31.0%	22.6%	15.5%	11.9%
Educational services	8.3%	33.3%	25.0%	19.4%	13.9%

Table 16 – Employee – Supportive for Schedule Changes by Sector

Training Enhances my Job Performance

Sector	% Strongly Agree	% Agree	% Neither Agree nor Disagree	% Disagree	% Strongly Disagree
Public administration	25.0%	53.6%	10.7%	0.0%	10.7%
Health care and social assistance	32.9%	43.0%	13.9%	6.3%	3.8%
Utilities	25.0%	50.0%	0.0%	0.0%	25.0%
Business, building and other support services 2	46.7%	26.7%	6.7%	6.7%	13.3%
Professional, scientific and technical services	36.4%	36.4%	9.1%	0.0%	18.2%
Educational services	17.6%	50.0%	26.5%	0.0%	5.9%
Agriculture & Mining, quarrying, oil and gas extraction 4	23.3%	43.3%	26.7%	3.3%	3.3%
Construction	33.3%	33.3%	16.7%	0.0%	16.7%
Information, culture and recreation1	18.2%	45.5%	13.6%	13.6%	9.1%
Finance, insurance, real estate, rental and leasing5	21.2%	40.4%	23.1%	3.8%	11.5%
Wholesale and retail trade 3	11.4%	43.2%	29.5%	4.5%	11.4%
Manufacturing	18.2%	34.1%	29.5%	0.0%	18.2%
Transportation and warehousing	16.7%	33.3%	25.0%	16.7%	8.3%
Accommodation and food services	20.0%	26.7%	40.0%	3.3%	10.0%
Other services (except public administration)	11.1%	33.3%	38.9%	11.1%	5.6%

Table 18 – Employee – Receiving job training enhances by performance by Sector

Training Encourages Me to Consider a Long-term Career with My Current Job

Sector	% Strongly Agree	% Agree	% Neither Agree nor Disagree	% Disagree	% Strongly Disagree
Utilities	25.0%	56.3%	0.0%	6.3%	12.5%
Construction	25.0%	50.0%	0.0%	0.0%	25.0%
Public administration	35.7%	35.7%	28.6%	0.0%	0.0%
Health care and social assistance	21.5%	46.8%	19.0%	7.6%	5.1%
Information, culture and recreation1	27.3%	40.9%	9.1%	13.6%	9.1%
Agriculture & Mining, quarrying, oil and gas extraction 4	23.3%	43.3%	20.0%	10.0%	3.3%
Educational services	17.6%	44.1%	29.4%	2.9%	5.9%
Business, building and other support services 2	20.0%	40.0%	20.0%	6.7%	13.3%
Transportation and warehousing	8.3%	50.0%	16.7%	8.3%	16.7%
Professional, scientific and technical services	18.2%	36.4%	36.4%	0.0%	9.1%
Finance, insurance, real estate, rental and leasing5	21.2%	32.7%	34.6%	5.8%	5.8%
Accommodation and food services	10.0%	40.0%	33.3%	6.7%	10.0%
Manufacturing	11.4%	38.6%	22.7%	9.1%	18.2%
Other services (except public administration)	22.2%	27.8%	33.3%	11.1%	5.6%
Wholesale and retail trade 3	13.6%	29.5%	40.9%	9.1%	6.8%

Table 19 – Employee – Receiving job training encourages me to consider a long term career by Sector

What are Employees Saying?

When our employees were asked to provide additional comments regarding their employment needs, several common themes emerged.

Appropriate Training for Enhancement and Sense of Belonging - Employees said job-related training is important to their work performance and receiving upskilling opportunities with employer's recognition fosters their commitment to the organization. In particular, training is the most frequently mentioned area among employees in the health and social assistance sector.

Respectful and Safe Working Environment - Feeling respected and recognized in a safe working environment is another common concern of our employees. Notably, respondents from various in-demand sectors viewed a positive working environment with respectful supervisors and supportive co-workers outweighed high wages when determining to stay or quit their current position. Respondents expressed that being treated with respect included feeling their voices heard and responded by the management was important and prefer employers to clearly inform them of the job expectations and opportunities for a career prospects in the recruitment process.

Living Wage and Employment Benefits to secure a Living in the Region - In view of the rising living costs across Canada, it is not surprising that our employees are equally concerned about wages and employment benefits. A considerable number of our respondents expressed that they took several part-time jobs to cover living costs. It appeared that employees value other employment benefits that assist them to secure a better living, including medical and dental benefits, daycare or paid time-off.

Flexibility & Work-Life Balance - Notably, female respondents expressed that part-time or remote work allows them to take care of school-age children in the absence of affordable and attainable daycare. Older employees approaching or past retirement age are willing to continue working part-time. It is also noteworthy that unpredictable work schedules (shift work) and too long working hours in some of the in-demand sectors including health and social assistance and Accommodation and food services have caused driven employees to quit for better work-life balance.



Job Seeker Responses

Given the current labour shortages we included some questions for job seekers in the 2023 Employee Survey to find out what their employment needs and concerns are. Some sectors are facing critically high vacancy rates and have indicated year over year in the EmployerOne Survey an increase in the rating of "poor" when referring to the quality of candidates available.

In the 2023 Employee Survey, we collected 258 responses from job seekers looking for employment within the Stratford-Bruce Peninsula Economic Region. The survey completion rate was 74%.

Job Seekers County by Place of Residence

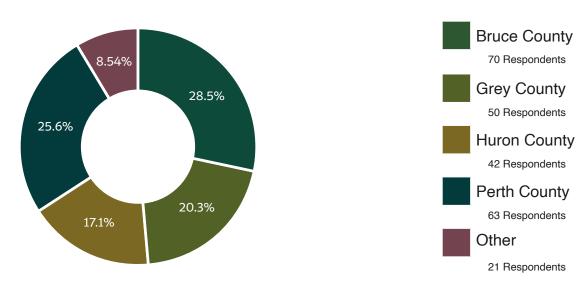


Table 1 - Job Seekers by Place of Residence

Job Seeker Responses by Age

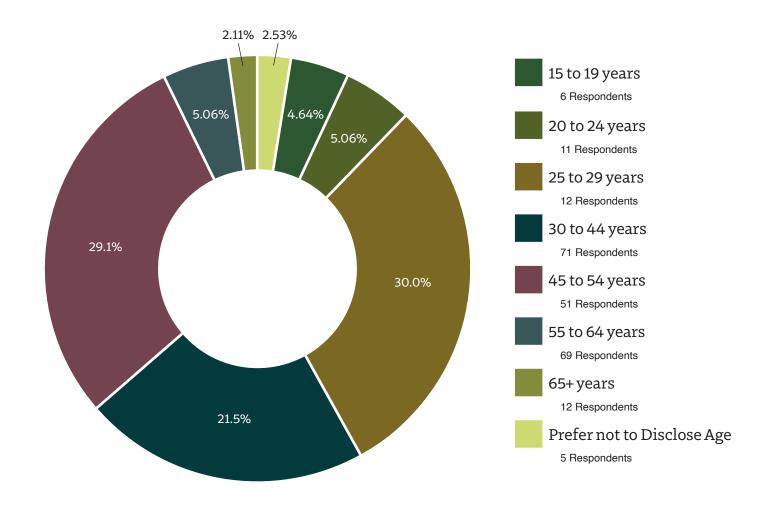


Table 2 - Job Seeker responses by age

Job Seeker Reasons for Leaving Their Last Position

Only around 31.4% of respondents said they quit their last job. Those who indicated they quit were asked to rate the top four most important reasons (from least important to most important). Table below shows the total score of each reason. The higher the score, the more important is the reason for quitting the last employment.

Our survey found that health concerns is the most important factor for workers to quit, followed by lack of career development opportunities, workplace harassment or bullying, and unpredictable work schedules. It is not surprising that health concern was ranked the highest as we have an aging workforce who have health concerns that prevent them from participating.

Reason for Job Seeker Quits	Total Score
I had health concerns (including mental health) that required me to leave my job	47
There were no career development opportunities at work (i.e., training, moving into different roles)	45
I experienced harassment or bullying at work	41
My schedule was unpredictable	39
I wasn't using my skills/experience/education/training in my work	31
I was not given enough working hours	24
I was travelling too far for work	23
There was no grievance procedures for addressing concerns in the workplace	21
I found a different job that paid more / with more employment benefits	17
There was not enough childcare facilities/support near the workplace	15

Table 4 - Job Seekers Reasons for Quits

Table below shows the sector distribution of job seekers currently looking for employment in the region. It is not unreasonable that the largest shares of job seekers previously worked in Health care and social assistance (20.0%), followed by Manufacturing (19.6%) and Accommodation and food services (18.4%). The three sectors contribute to about 30.8% employment in the region and are major in-demand sectors as measured by number of job postings i. Also, we have heard from local stakeholders regarding high employee turnover and recruitment difficulties in Healthcare and social assistance as well as Accommodation and food services.

It is alarming that while the second largest share of job seeker respondents previously worked in Accommodation and Food services, the sector does not stand out as their top choices for future employment.

Job Seeker Sector Previous Employment by Sector

Industrial Sector	% In Job Seekers
Health care and social assistance	20.0%
Manufacturing	19.6%
Accommodation and food services	18.4%
Professional, scientific and technical services	13.9%
Wholesale and retail trade 3	13.9%
Business, building and other support services 2	13.5%
Transportation and warehousing	10.6%
Agriculture & Mining, quarrying, oil and gas extraction 4	9.8%
Construction	9.0%
Educational services	8.6%
Information, culture and recreation1	6.9%
Finance, insurance, real estate, rental and leasing5	6.5%
Public administration	6.1%
Other services (except public administration)	5.7%
Have not previously been employed	3.7%
Self-employed	2.0%
Utilities	0.8%

Table 3 – Job Seekers previous employment by Sector

Industrial Sector (NAICS - 2 Digit)	% Previously worked in the sector selecting the same sector as future employment choice
Utilities	100.0%
Public administration	83.3%
Business, building and other support services ²	83.3%
Professional, scientific and technical services	72.7%
Transportation and warehousing	70.8%
Information, culture and recreation ¹	68.8%
Health care and social assistance	67.4%
Construction	65.0%
Educational services	61.9%
Manufacturing	54.6%
Wholesale and retail trade ³	48.4%
Agriculture & Mining, quarrying, oil and gas extraction ⁴	47.8%
Accommodation and food services	47.6%
Finance, insurance, real estate, rental and leasing ⁵	43.8%
Other services (except public administration)	33.3%

Table 6 – Job Seekers who prefer the same sector they left

What Sectors are Job Seeker Respondents Interested In?

When asked to choose up to three sectors for future employment, about 25.9% respondents selected Business, building and other support services, followed by Health care and social assistance (22.0%), Public Administration (21.1%), Manufacturing (19.8%) and Educational Services (18.5%).

Sector for Future Employment	Percentage
Administrative and support, waste management and remediation services	25.86%
Health care and social assistance	21.98%
Public administration	21.12%
Manufacturing	19.83%
Educational services	18.53%
Transportation and warehousing	17.24%
Accommodation and food services	14.66%
Professional, scientific and technical services	14.22%
Retail trade	14.22%
Arts, entertainment and recreation	13.36%
Agriculture, forestry, fishing and hunting	12.50%
Information and cultural industries	12.50%
Construction	11.64%
Other services (except public administration)	9.48%
Other (please specify)	9.48%
Finance and insurance	7.76%
Utilities	7.76%
Real estate and rental and leasing	3.02%
Wholesale trade	1.72%
Mining, quarrying, and oil and gas extraction	1.29%

Table 5 – Job Seekers preferences for future work by Sector

How are Job Seeker Respondents Looking for Work?

Our employer respondents in the 2023 EmployerOne Survey indicated that word of mouth remained the most used recruitment method and there was a drop in utilizing online job boards, this survey finds that job seekers most preferred online job boards.

When asked to rate three most preferred job searching methods, over 72% respondents selected online job boards as their top three choices, and over 45% respondents selected online Job Board as "the most preferred" method. Table below ranks job search methods according to their total weighted scores. The higher the score, the more preferred is the channel.

Job Search Method – Most Preferred	Weighted Score	% Of Respondents
Online Job Boards (Indeed, Canada Job Bank, local job board sites)	399	45.2%
Word of Mouth (Referred by personal network)	192	15.7%
Resume directly to employer (no job ad posted or only posted on company site)	145	9.2%
Advertisements (Social media, newspaper)	141	9.2%
Job Fairs (Onsite, online or other multiple employer hiring events)	72	2.8%
Industry or Association websites (Union, or other Industry specific sites)	53	2.3%
Employment Service Provider (Service Canada, Employment Ontario offices)	52	3.2%
Hiring Agency (Temporary agencies or headhunting services)	52	1.8%
Job Site Signage (Posters, billboards)	47	1.8%

Table 7 – Job Seekers Preferred Job Search methods

Why are These Methods Used by Respondents?

When asked to rate the three most important reasons for their choice of job search channels, getting more updated job information was ranked by our respondents as the most important, followed by a higher chance of getting hired, and easy to access. As our local job seekers lean towards online job boards there may be an opportunity to increase awareness and use of the www.connect2jobs.ca platform as a way of connecting job seekers to local opportunities.

What are Job Seekers Saying?

When our job seekers were asked to provide additional comments regarding their employment needs, several common themes emerged.

Part-time or Flexible work Arrangements - A considerable number of job seekers have been looking for more flexible working arrangements, including part-time or remote work because of age, health, family or personal schedule. In particular, female and older job seekers.

The Job Search - It is noteworthy that job seekers found it frustrating not receiving responses or feedback from employers after applying for job positions. While it is understandable that local employers might not be able to spare resources informing all applicants of the recruitment, lacking channels to get job application updates on may stop potential candidates from applying.

Employment Barriers - While our older population are willing to work past the retirement age, senior job seekers appeared to experience barriers due to age and related health concerns. Similarly, disabled job seekers also encountered difficulties finding jobs that could accommodate their physical needs.

Lacking Job Experience or Certifications - On the supply side, younger job seekers in in-demand sectors including manufacturing, transportation and warehousing and accommodation and food services expressed difficulties finding employment due to their lack of practical experiences after their certification/graduation. And job seekers from younger age cohorts appeared to appreciate mentorship and training.

Experienced job seekers lacking education attainments - Job seekers in educational services, healthcare and social assistance and retail trades said their previous experiences and skills were not valued in the job seeking process as they cannot meet the educational requirements.

Lack of local jobs in certain areas of expertise – Notably, a number of job seekers in Professional, scientific and technical services, Finance and Service and Arts, entertainment and recreation were concerned about limited local employment opportunities in their sectors and started searching for remote positions outside of the region. The concerns on potential mismatch between qualifications of job seekers and job vacancies in the region may be a significant drive pushing our younger population out of the region after graduation.

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- i. Real-time regional job posting data from Connect2JOBS.ca platform.
- ii. 75% employers in Construction, 64% in Manufacturing, 60% in Agriculture, forestry, fishing and hunting, 53% employers in Health care and social assistance and 52% in Retail trade rated the availability of qualified workers as poor in the 2023 EmployerOne Survey.

Weighted Score - Calculation

Calculation of the total score of each employment factor involves the weighted sum of all the ratings each factor has scored. Descending marks are allocated according to level of importance, 4 marks for "the most important", 1 mark for "the least important" and 0 mark for not selected as one of the top 4 important factors.

Total score = $4 \times 10^{\circ}$ no. of "the most important" rating + $3 \times 10^{\circ}$ no. of "fairly important" rating + $2 \times 10^{\circ}$ no. of "Less important" rating + $1 \times 10^{\circ}$ no. of "the least important"

Score range

Minimum = 0 (i.e. not being selected as one of the important factors)

Maximum = 4 X total no. of respondents (i.e. all respondents selected a factor as "the most important")

Normalization

To avoid discrepancy and misunderstanding in data presentation due to differences in total score resulted from differences in number of respondents in different age cohorts, the total score is then normalized as a **final score** ranging from 0 to 1. The higher the score, the greater is the importance of the employment factor.



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