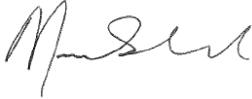




# COMMUNICATION UPDATE

<b>TO:</b>	Mayor and Members City Council
<b>DATE:</b>	April 15, 2021
<b>SUBJECT:</b>	COVID Business Impact & Workforce Needs Survey Results – (January 19, 2021 – February 14, 2021)
<b>WARD(S) AFFECTED:</b>	City Wide
<b>SUBMITTED BY:</b>	Norm Schleeahn Director, Economic Development Planning and Economic Development
<b>SIGNATURE:</b>	

In partnership with Workforce Planning Hamilton, the City of Hamilton's Economic Development Division carried out a COVID Business Impact & Workforce Needs survey between January 19, 2021 and February 14, 2021 to determine the impacts of the pandemic on our business community and workforce.

During this approximately four-week period, 1,546 respondents contributed qualified survey responses, which is an increase of almost fifty percent over the previous COVID Business Impact Survey that was undertaken at the onset of the pandemic in 2020.

This survey report summarizes and aggregates individual and confidential data that was generously contributed by Hamilton business community leaders and entrepreneurs, for the purpose of providing aggregate industry sector and other business category overviews and enabling direct follow up from survey partners where prompted by the respondent.

The results from the survey are attached for your information and will be presented to the Mayor's Economic Recovery Task Force on Friday, April 16, 2021.

Should you have any questions or require further information, please contact Norm Schleeahn, Director, Economic Development at (905) 546-2424 Ext. 2669 or via email at [Norm.Schleeahn@hamilton.ca](mailto:Norm.Schleeahn@hamilton.ca).

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OUR Vision: To be the best place to raise a child and age successfully.

OUR Mission: To provide high quality cost conscious public services that contribute to a healthy, safe and prosperous community, in a sustainable manner.

OUR Culture: Collective Ownership, Steadfast Integrity, Courageous Change, Sensational Service, Engaged Empowered Employees.

**APPENDICES AND SCHEDULES ATTACHED**

Appendix “A” to COVID Business Impact & Workforce Needs Survey Results – (January 19, 2021 – February 14, 2021)

**Appendix "A" to COVID Business Impact & Workforce Needs Survey  
Results – (January 19, 2021 – February 14, 2021)**



**City of Hamilton – Business Impact & Workforce Needs Survey  
(January 14 – February 19, 2021)**

**PRESENTED BY:  
NORM SCHLEEHAHN - DIRECTOR, ECONOMIC DEVELOPMENT, CITY OF HAMILTON**

# SURVEY SUMMARY

In partnership with Workforce Planning Hamilton, the City of Hamilton launched a Business Impact & Workforce Needs survey on January 19, 2021 and closed the survey on February 14, 2021.

This collaboration enabled the completion of two important business engagement surveys to happen simultaneously, with greater respondent totals than would have been accomplished individually.

The combined effort also aimed to minimize the level of “survey fatigue” being experienced by local businesses due to the increased quantity of research being undertaken by various levels of government and the private sector.

# SURVEY SUMMARY

This survey report summarizes and aggregates individual and confidential data that was generously contributed by Hamilton business community leaders and entrepreneurs, for the purpose of providing aggregate industry sector and other business category overviews, and enabling direct follow up from survey partners where prompted by the respondent.

Over approximately four weeks, 1,546 respondents contributed qualified responses. Qualified responses met the following conditions:

- The respondent accepted the terms and conditions of the survey;
- The respondent completed the questions requesting that they identify their industry and the revenue impact on their business;
- The responses, upon review, were deemed to not be materially inaccurate; and
- Only one response would be permitted for each individual local business.

# SURVEY SUMMARY

- An enhanced effort was undertaken by the Business Impact & Workforce Needs Survey partners and other individuals through various social media channels encourage and enable any Hamilton based business owner to participate in the survey.
- The most influential enhancement from the first COVID Impact Study (undertaken in April 2020) was the direct engagement of licensed businesses in Hamilton. An invitation to participate in the survey was sent to the email address provided by over 5,000 Hamilton business license holders, with over 500 of those invitations resulting in some level of engagement with the survey.
- While the outcome of those efforts appear to have produced a fairly representative group of respondents, the Business Impact Survey did not pursue academic standards and methodologies to enable the results to be considered scientifically representative (such as random sampling, etc.).

# KEY FINDINGS

- Businesses across all industry sectors, and across every business size category, have been significantly impacted by the COVID-19 pandemic and the resulting actions taken by governments around the world to mitigate the associated health impacts.
- The aggregated employment impact from all respondents who participated in the survey (who collectively represent approximately 46,000 employees) communicates an employment decrease of almost 8,000 jobs (based on reported employment totals in January 2020, which was almost 54,000) representing a city-wide decrease of 14.5%.
- Approximately 80% of respondents reported a decrease in revenue in 2020 due to COVID-19, with approximately 25% of respondents indicating that the decrease in revenue was 50% or greater when compared to the prior year.

# KEY FINDINGS

## SUMMARY OF TOTAL RESPONSES

**1 546**

NUMBER OF QUALIFIED  
RESPONDENTS

**50%**

SURVEY COMPLETION

**7m:10s**

AVERAGE TIME SPENT

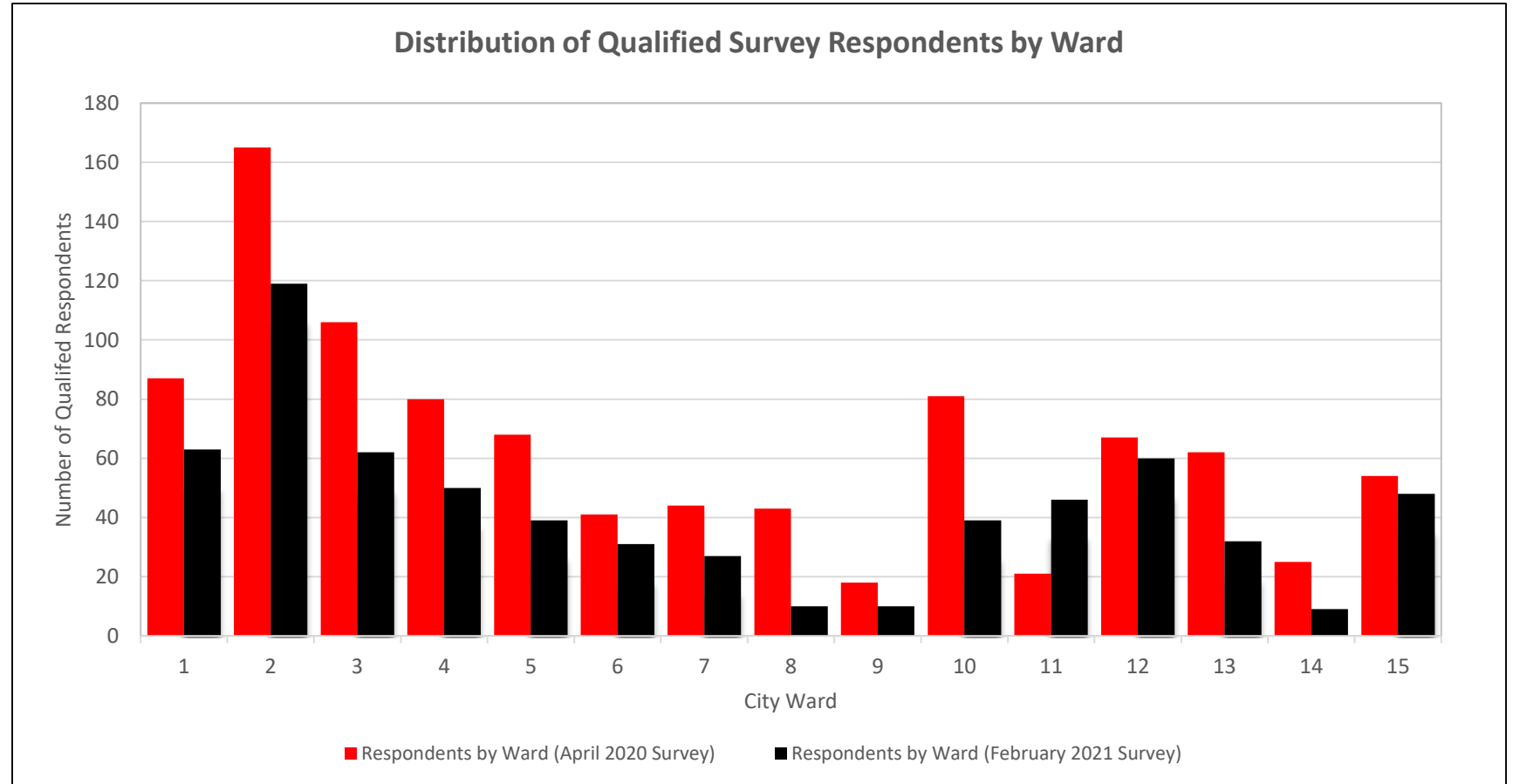


# OUTREACH CHANNELS



# Distribution of Survey Respondents by Ward

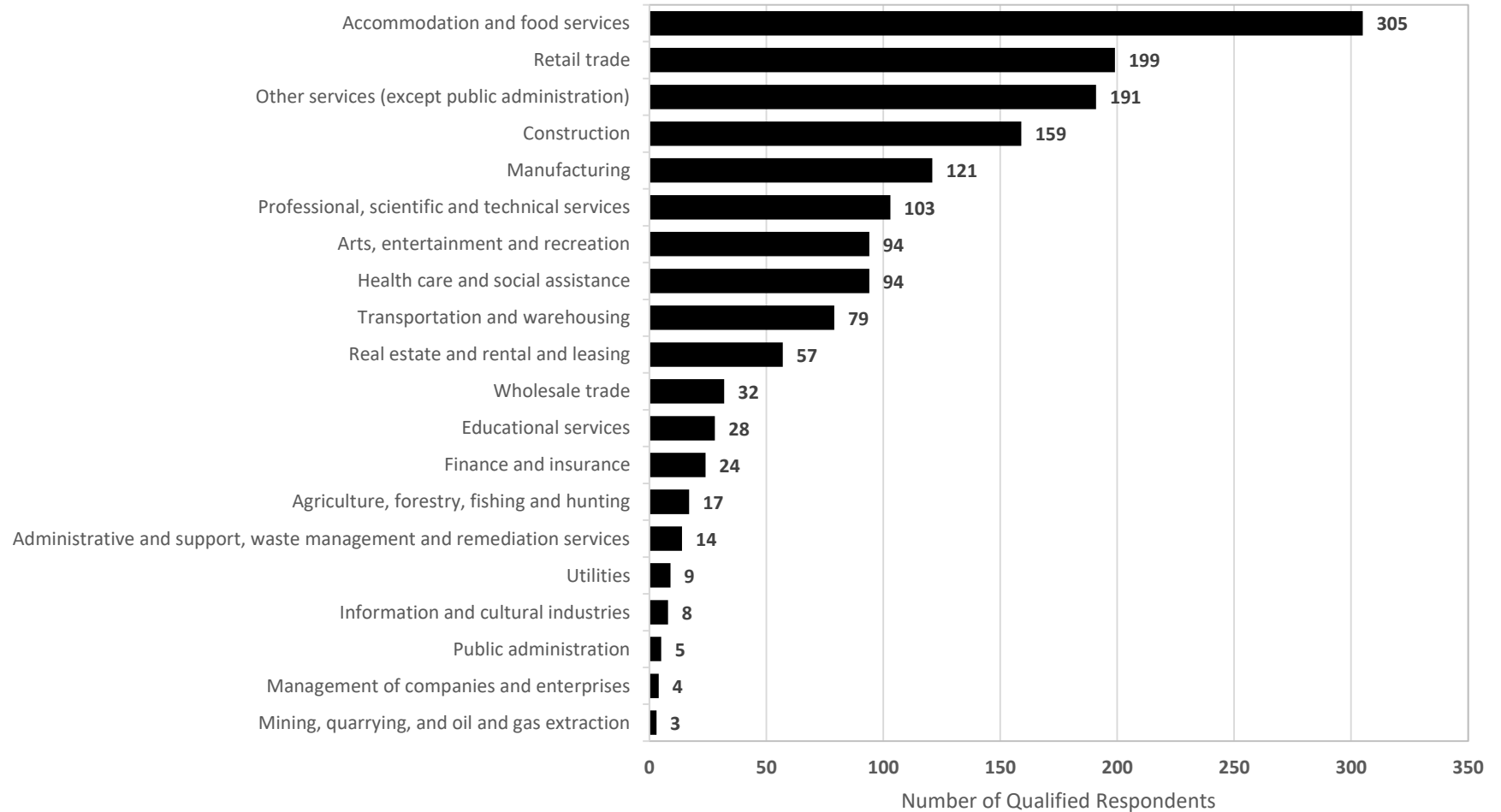
**RESPONDENT  
DEMOGRAPHICS**



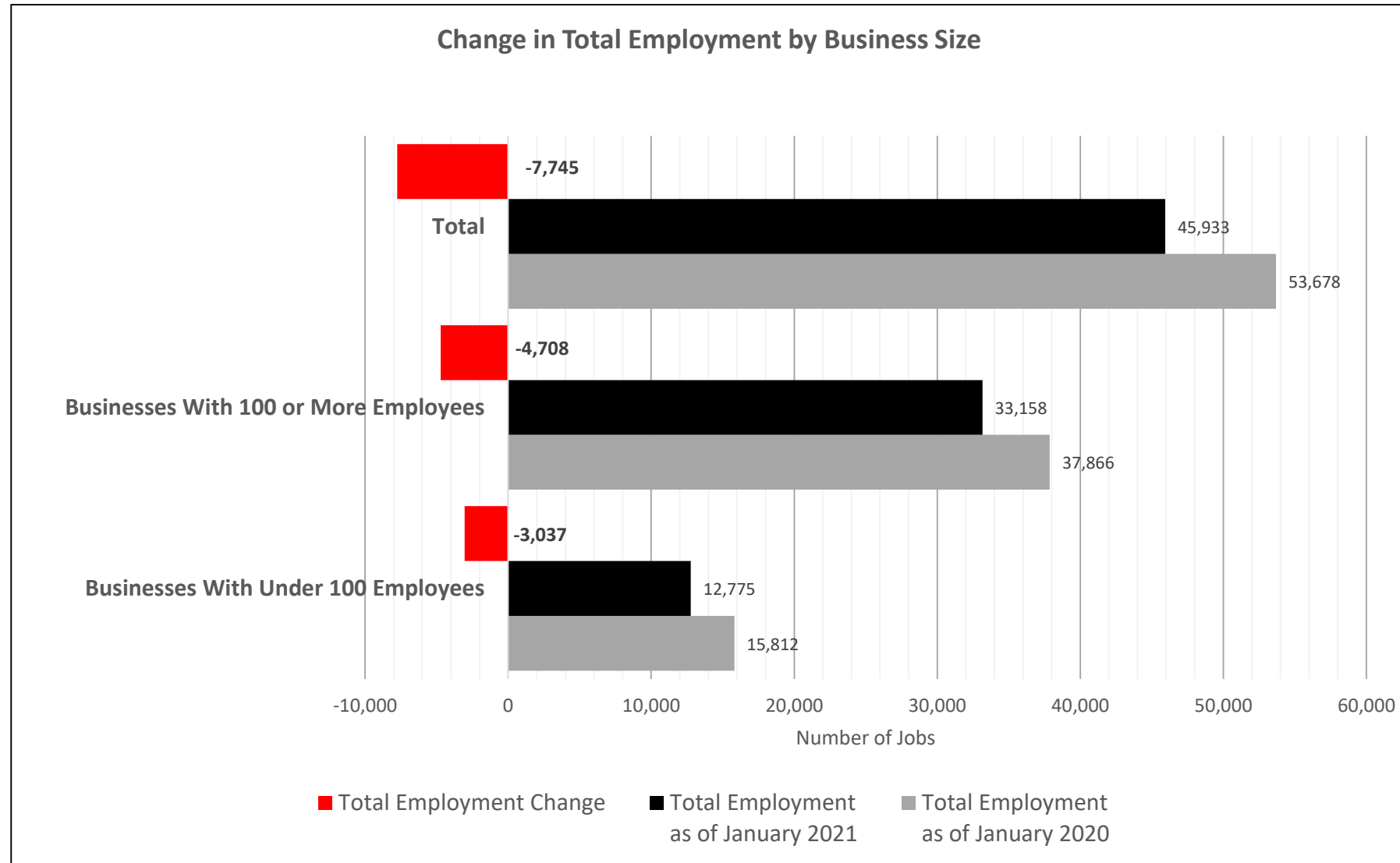
# Distribution of Survey Respondents by Industry Sector



Qualified Respondents by Industry Sector

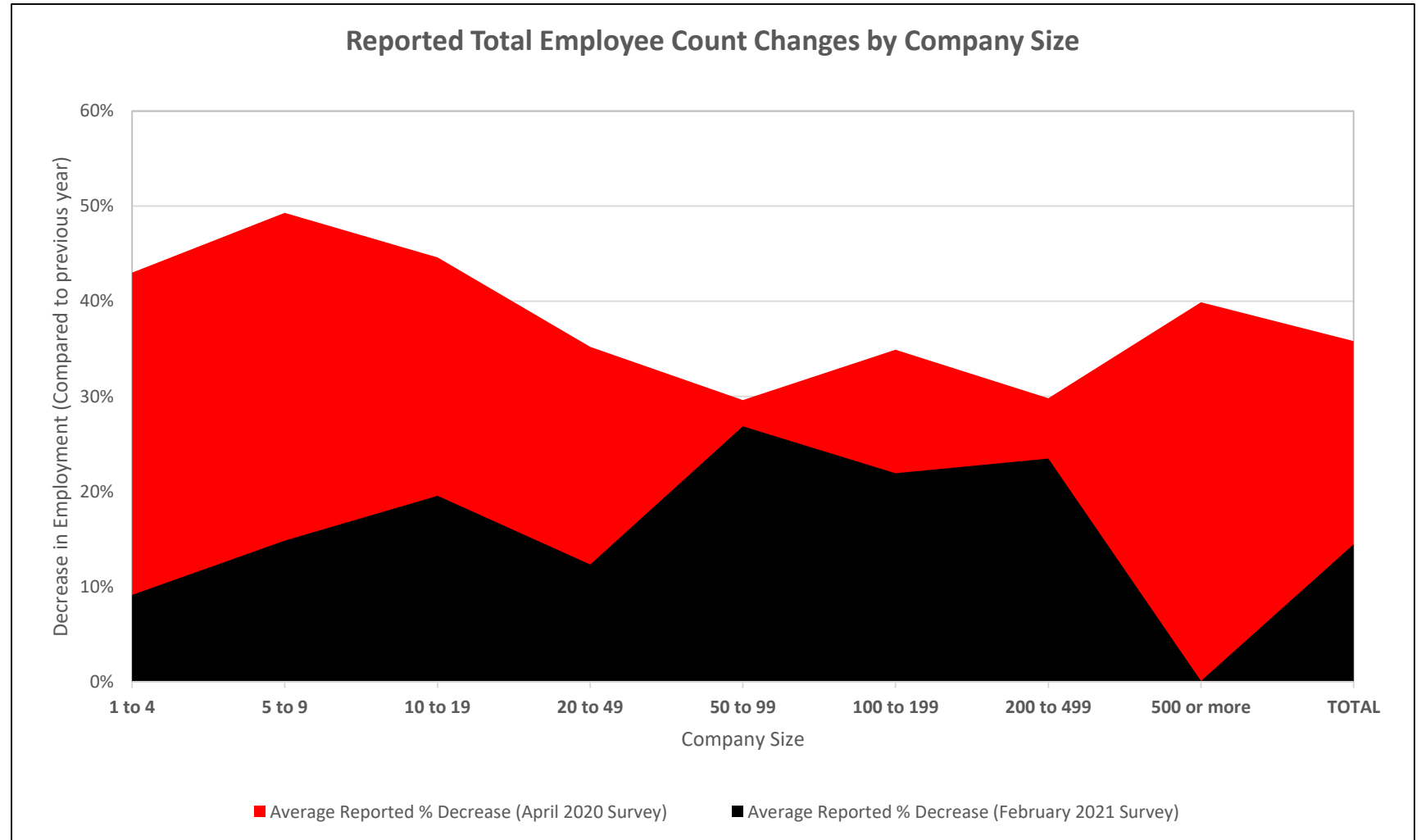


# Reported Impact on Employment Totals by Business Size



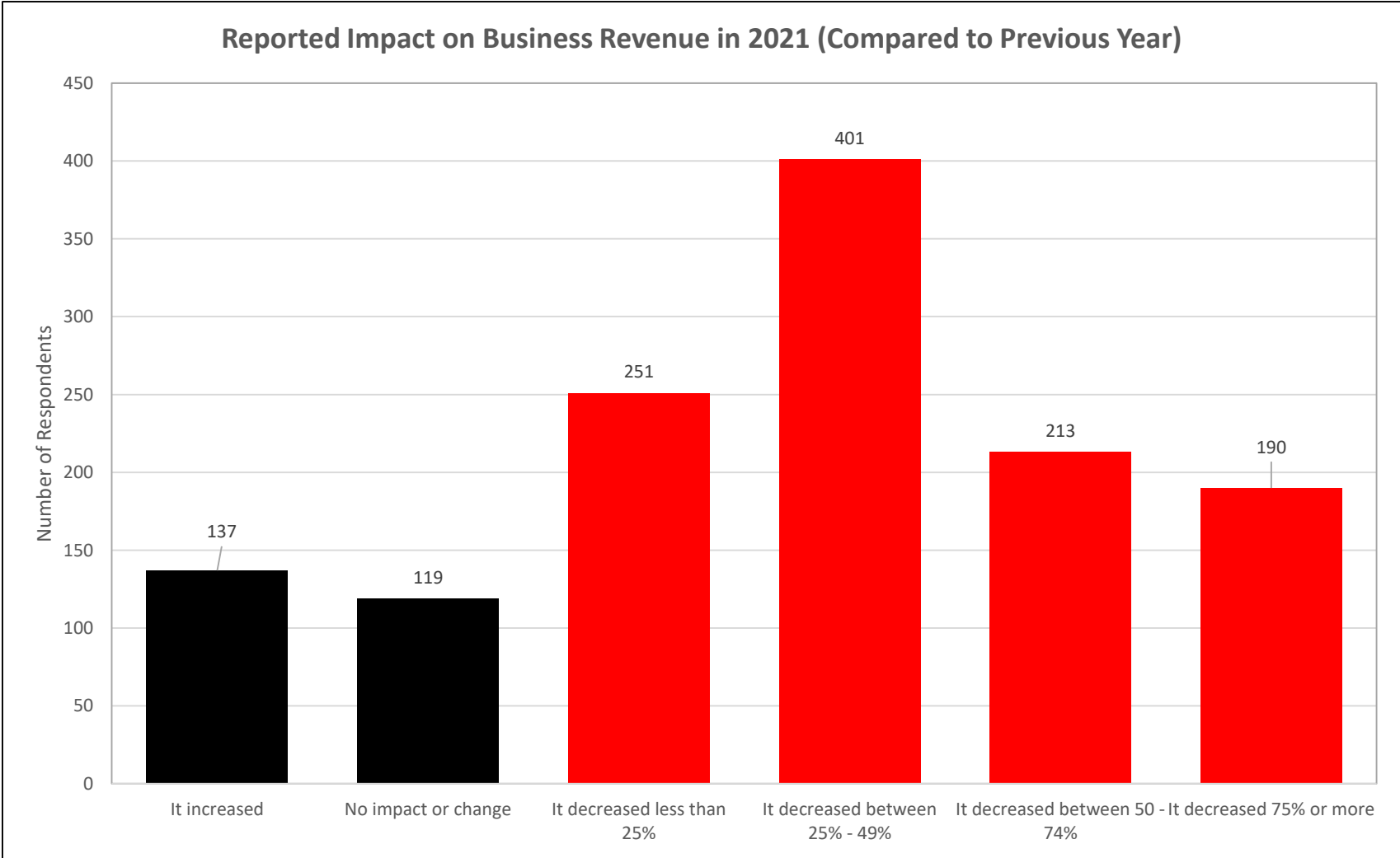
# Reported Impact on Employment Totals by Business Size

**IMPACT ON  
EMPLOYMENT**



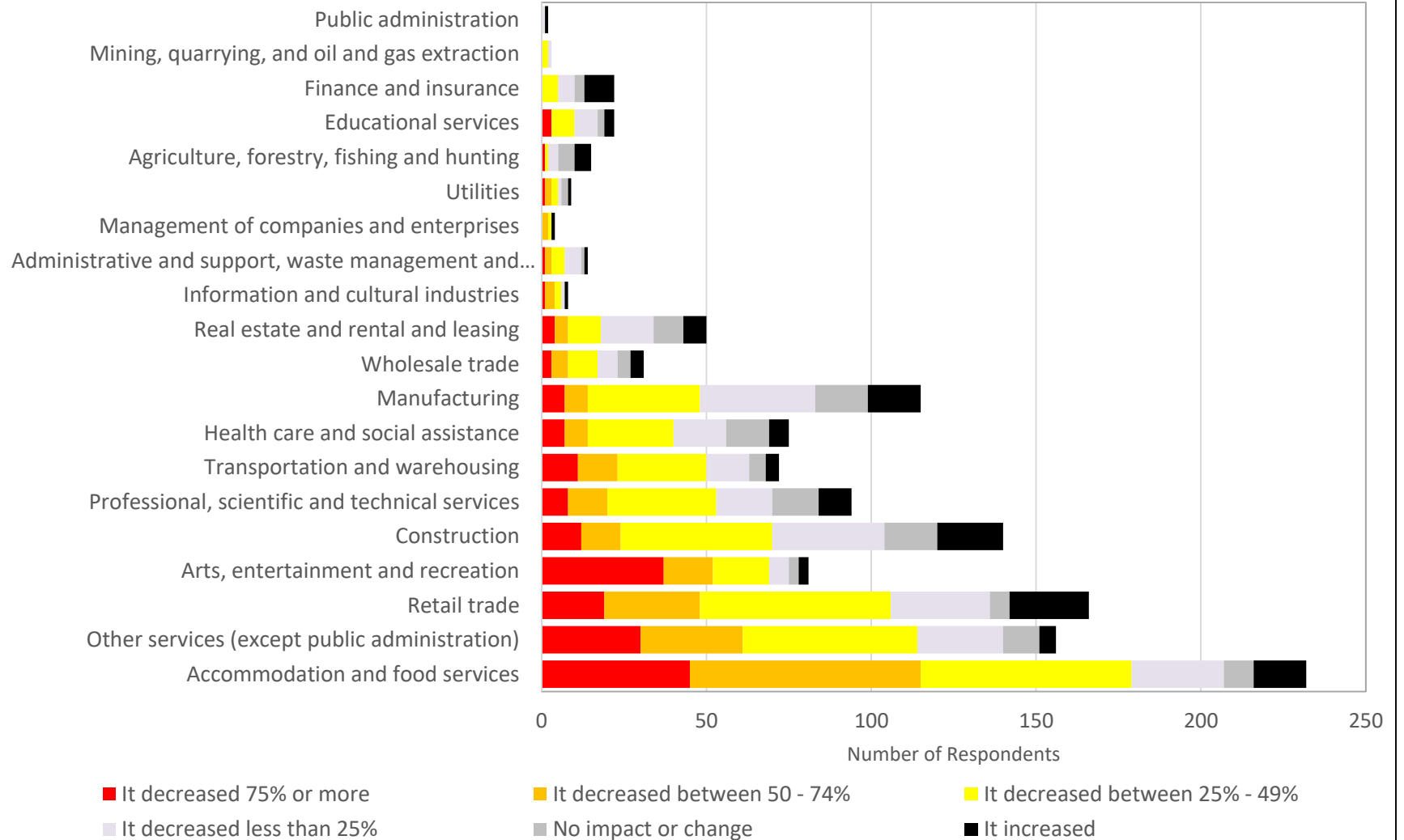
# Reported Impact on Revenue (Compared to Previous Year Totals)

**IMPACT ON REVENUE**



# Reported Revenue Impact by Industry Sector

Reported Revenue Change (Compared to Previous Year) by Industry Sector



**IMPACT ON  
REVENUE**

# Forecasted Impact on Future Employment Totals by Business Size



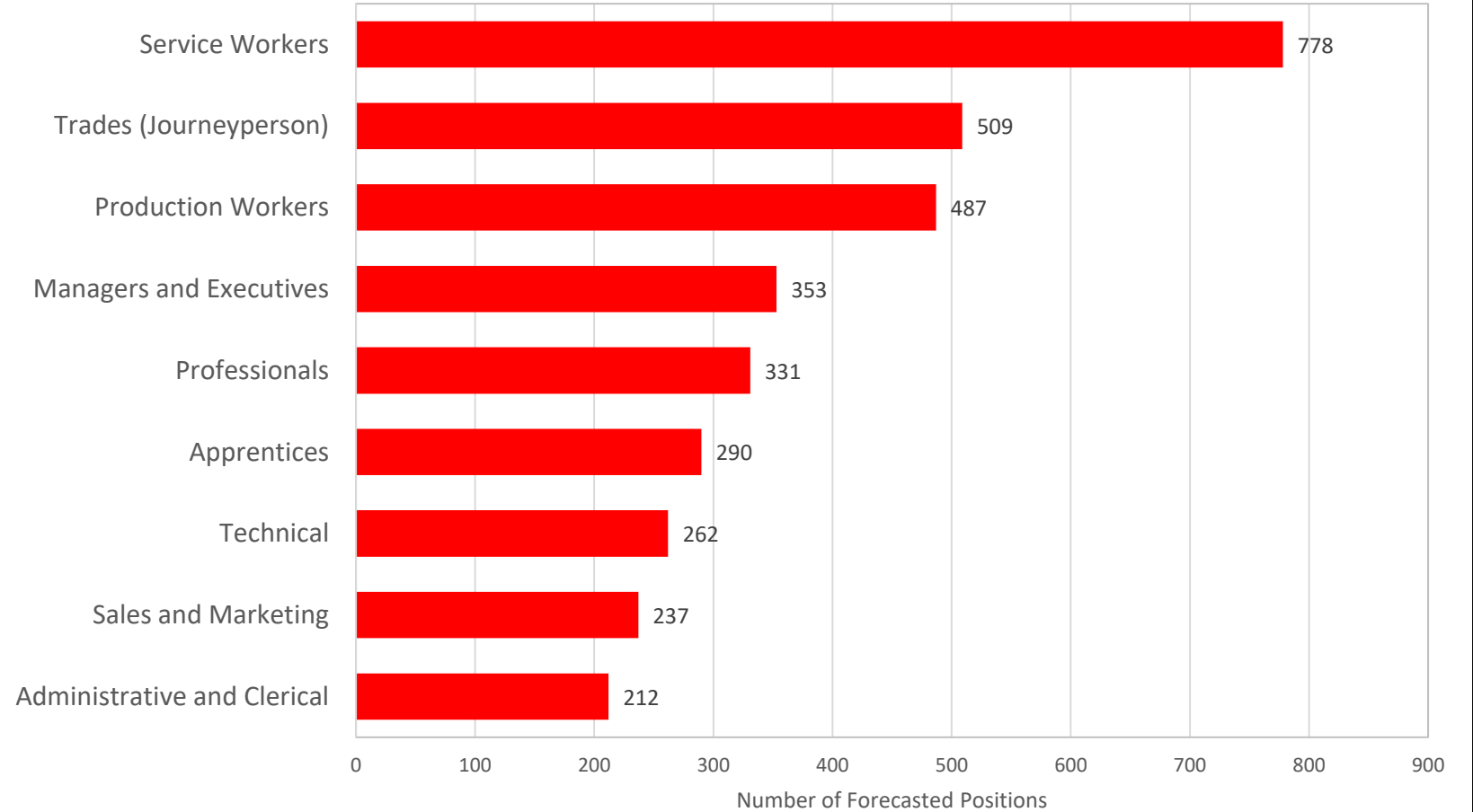
Company Size	Number of Companies	How many employees does your business currently have? (January 2021)	How many employees did your business have in January 2020?	How many employees (in total) do you forecast your business will need when all COVID-19 related restrictions are lifted? (When things return to normal)	Anticipated Change compared to pre-pandemic
500 or more	14	19,785	21,772	21,702	-70
200 to 499	28	7,668	9,003	8,200	-803
100 to 199	53	5,705	7,091	7,231	140
50 to 99	65	3,870	4,414	4,337	-77
20 to 49	178	3,927	5,368	5,357	-11
10 to 19	216	2,240	2,869	2,850	-19
5 to 9	279	1,378	1,800	2,084	284
1 to 4	705	1,360	1,361	2,098	737
TOTAL	1538	45,933	53,678	53,859	181



# Workforce Insights

## WORKFORCE INSIGHTS

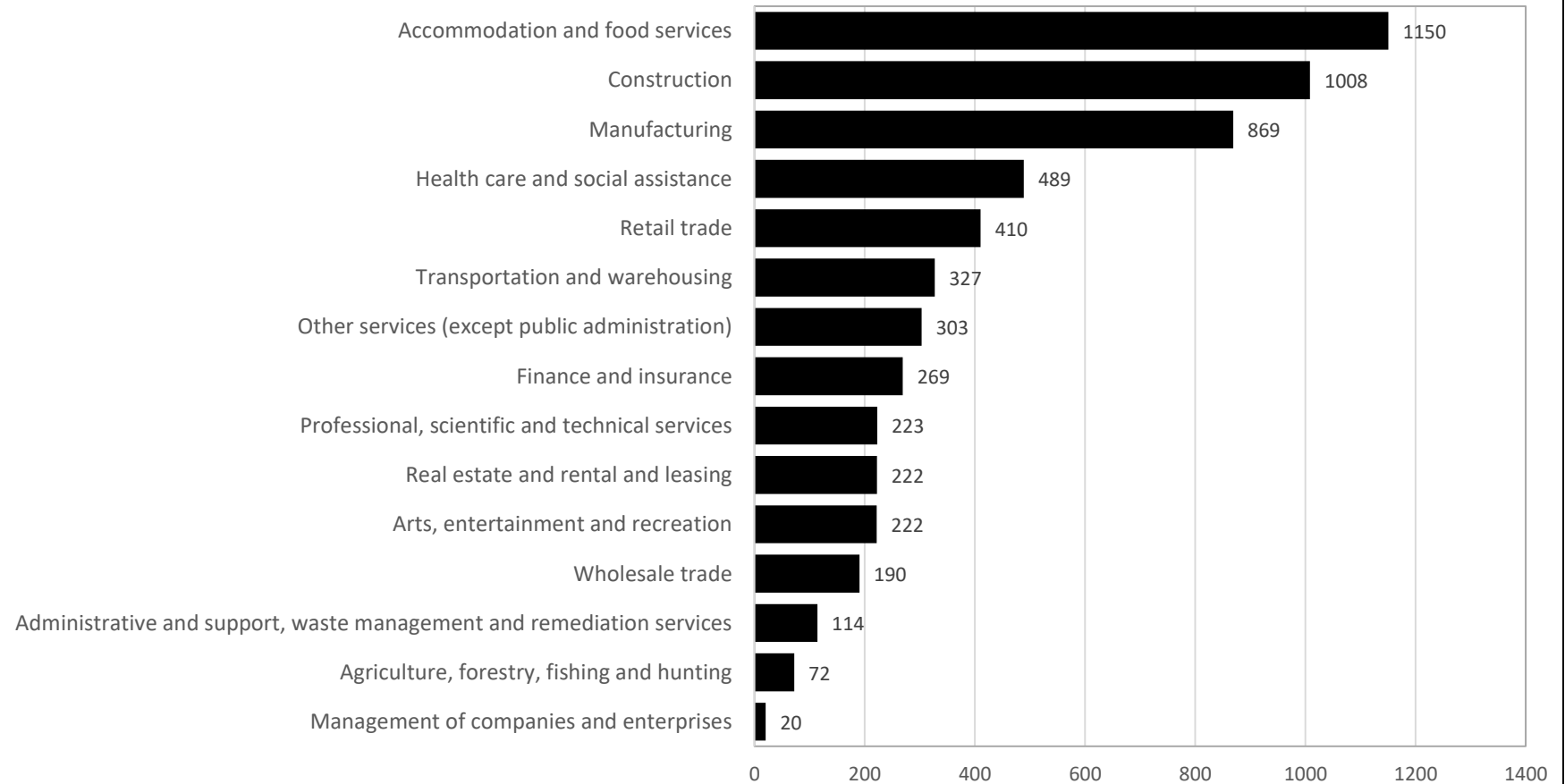
Hiring Intentions by Job Type



# Workforce Insights

## WORKFORCE INSIGHTS

### Number of Reported CEWS Supported Employees by Industry Sector



# RESPONDENT BUSINESS PRIORITIES FOR 2021

**CALL  
TO ACTION**



586

Increasing the online presence of their business



575

Increasing marketing / promotional activities



473

Finding and applying to government funding programs



396

Attracting new employees



308

Forming local partnerships and buying local



227

Business expansion



# Intended Future Engagement

Respondents Interested in Participating in Future Surveys

993

The previous survey had 600+ respondents indicate a willingness to participate in future surveys, and that list had a high engagement level for this survey

Respondents providing permission have their email address added to the Hamilton Economic Development e-distribution list

465

The e-distribution list has not seen this many new subscribers in the past 3 years combined



# THANK YOU

Norm Schleeahn

Director, Economic Development Division

[norm.schleeahn@hamilton.ca](mailto:norm.schleeahn@hamilton.ca)

[WWW.INVESTINHAMILTON.CA](http://WWW.INVESTINHAMILTON.CA)

 **INVEST  
IN HAMILTON**

  
Hamilton

# APPENDICIES

## Current/Future Employment Figures All Industries



# Current and Forecasted Impact on Employment by Industry Sector

## IMPACT ON EMPLOYMENT

	Employee Count January 2021	Employee Count January 2020	Forecasted Employee Count When all restrictions are lifted	Change 2020 vs 2021	% Change	Change 2021 vs. When Restrictions are lifted	Change 2020 vs. When all Restrictions are lifted	% Change 2020 vs. When all Restrictions are lifted	
Accommodation and food services	305	2,812	6,804	6,855	-3,992	-58.70%	4,043	51	0.70%
Retail trade	199	2,484	2,775	3,168	-291	-10.50%	684	393	14.20%
Other services (except public administration)	191	5,581	5,920	6,454	-339	-5.70%	873	534	9.00%
Construction	159	3,506	3,812	4,303	-306	-8.00%	797	491	12.90%
Manufacturing	121	14,969	15,789	15,465	-820	-5.20%	496	-324	-2.10%
Professional, scientific and technical services	103	1,437	1,575	1,302	-138	-8.80%	-135	-273	-17.30%
Arts, entertainment and recreation	94	1,214	2,328	2,324	-1,114	-47.90%	1,110	-4	-0.20%
Health care and social assistance	94	4,212	4,425	3,976	-213	-4.80%	-236	-449	-10.10%
Transportation and warehousing	79	1,853	2,624	2,312	-771	-29.40%	459	-312	-11.90%
Real estate and rental and leasing	57	858	889	462	-31	-3.50%	-396	-427	-48.00%
Wholesale trade	32	587	687	485	-100	-14.60%	-102	-202	-29.40%
Educational services	28	4,352	4,520	4,386	-168	-3.70%	34	-134	-3.00%
Finance and insurance	24	858	835	898	23	2.80%	40	63	7.50%
Agriculture, forestry, fishing and hunting	17	368	320	445	48	15.00%	77	125	39.10%
Administrative and support, waste management and remediation services	14	556	661	728	-105	-15.90%	172	67	10.10%
Utilities	9	98	118	73	-20	-16.90%	-25	-45	-38.10%
Information and cultural industries	8	20	20	27	0	0.00%	7	7	35.00%
Public administration	5	116	173	128	-57	-32.90%	12	-45	-26.00%
Management of companies and enterprises	4	39	57	58	-18	-31.60%	19	1	1.80%
Mining, quarrying, and oil and gas extraction	3	9	9	10	0	0.00%	1	1	11.10%
<b>TOTAL</b>	<b>1546</b>	<b>45,929</b>	<b>54,341</b>	<b>53,859</b>	<b>-8,412</b>	<b>-15.50%</b>	<b>7,930</b>	<b>-482</b>	<b>-0.90%</b>

# APPENDICIES

## Select Industry Sector Information For all Industry Sectors with 15+ Respondents





# INDUSTRY SECTOR OVERVIEW

Industry Sector: Accommodation and food services

Employment Totals by Industry Sector Chart

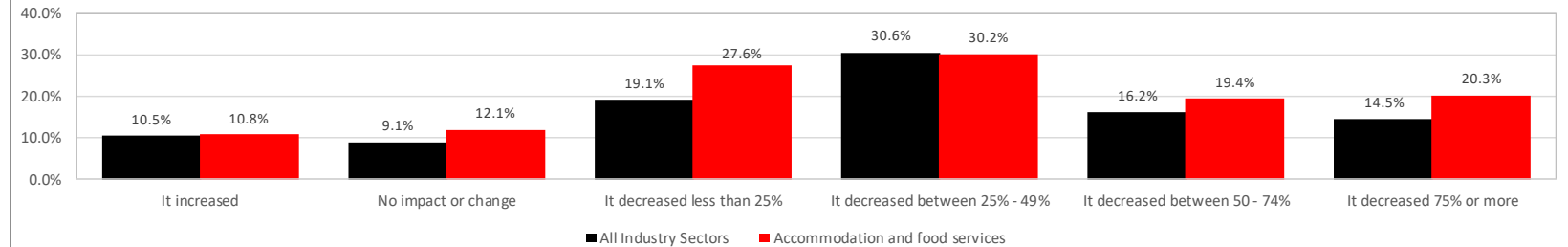
Number of Respondents	January 2021	January 2020	Change	Change %
305	2,812	6,804	-3,992	-58.7%

Employment Insights

176	Number of responding companies hiring in next six months
61.8%	Percentage of responding Companies Hiring in the next six months
4043	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
1,150	Number of Employees Supported by CEWS

**RESULTS BY  
INDUSTRY  
SECTOR**

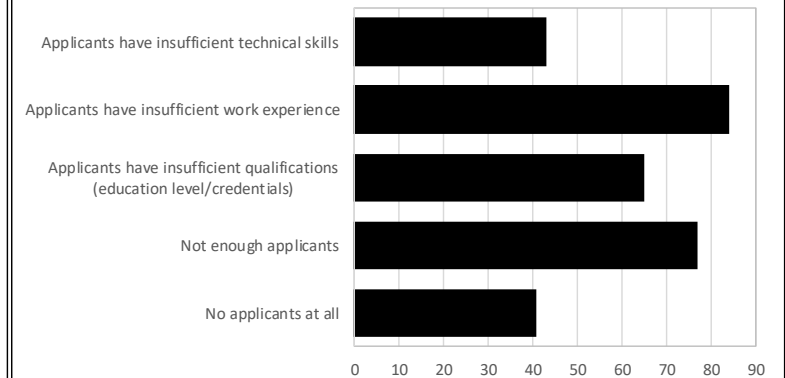
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



# INDUSTRY SECTOR OVERVIEW

**Industry Sector:** Agriculture, forestry, fishing and hunting

**Employment Totals by Industry Sector Chart**

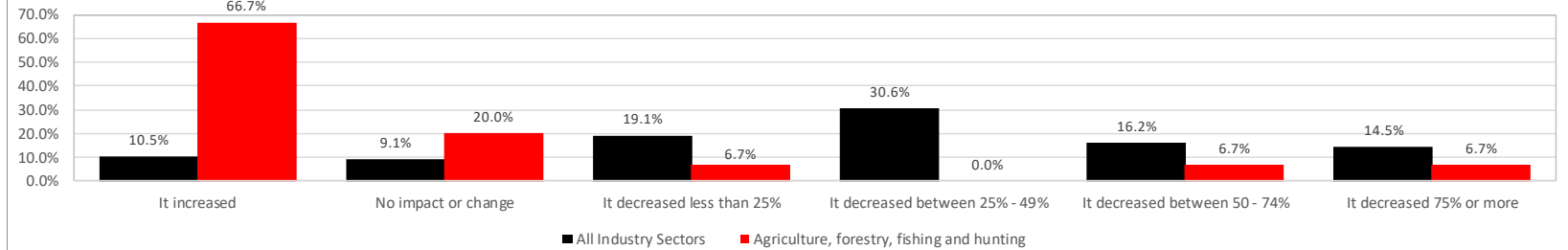
Number of Respondents	January 2021	January 2020	Change	Change %
17	368	320	48	15.0%

**Employment Insights**

10	Number of responding companies hiring in next six months
58.8%	Percentage of responding Companies Hiring in the next six months
77	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
72	Number of Employees Supported by CEWS



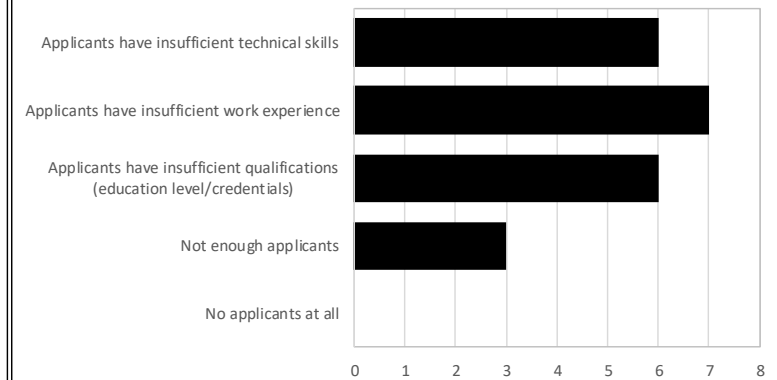
**Revenue Impact Comparative Analysis**



**Industry Sector Short Term Priorities**



**Industry Sector Hiring Constraints**



# INDUSTRY SECTOR OVERVIEW

Industry Sector: Arts, entertainment and recreation

Employment Totals by Industry Sector Chart

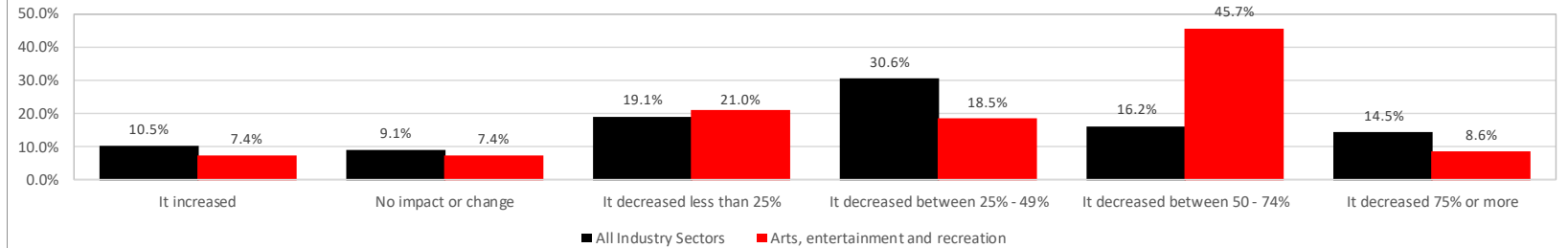
Number of Respondents	January 2021	January 2020	Change	Change %
94	1,214	2,328	-1,114	-47.9%

## Employment Insights

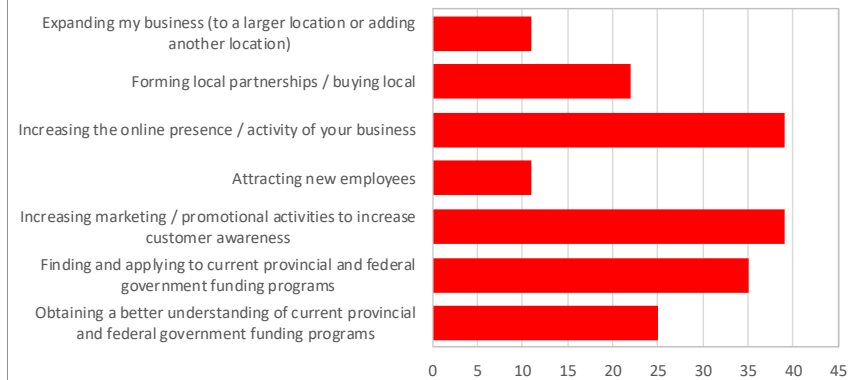
38	Number of responding companies hiring in next six months
44.2%	Percentage of responding Companies Hiring in the next six months
1110	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
222	Number of Employees Supported by CEWS

**RESULTS BY  
INDUSTRY  
SECTOR**

Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



# INDUSTRY SECTOR OVERVIEW

Industry Sector: Construction

Employment Totals by Industry Sector Chart

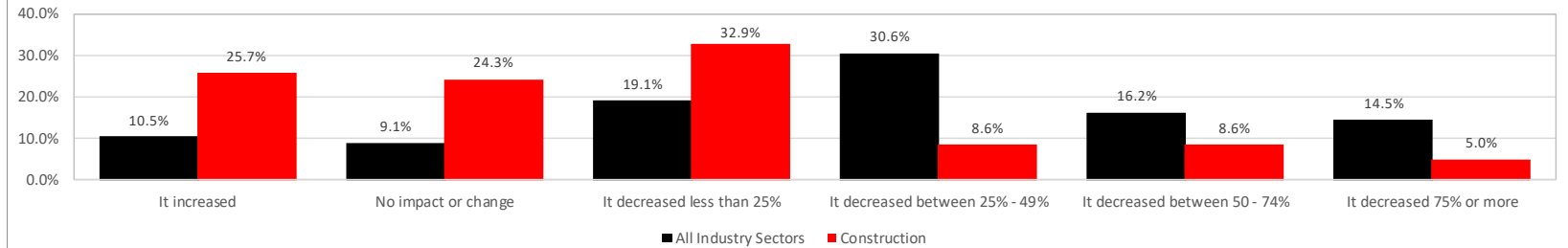
Number of Respondents	January 2021	January 2020	Change	Change %
159	3,506	3,812	-306	-8.0%

Employment Insights

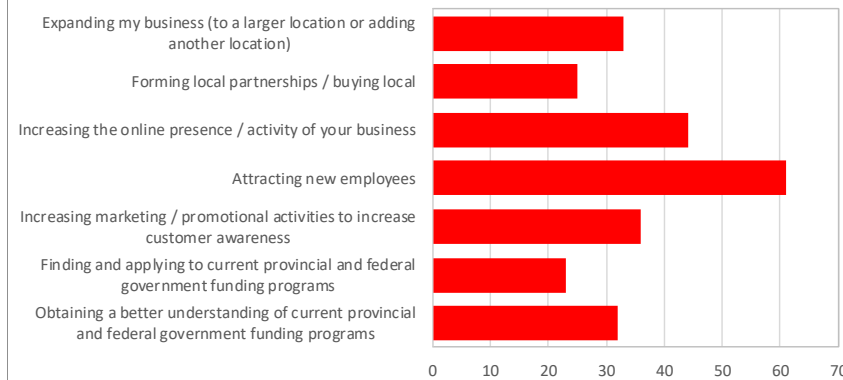
102	Number of responding companies hiring in next six months
71.3%	Percentage of responding Companies Hiring in the next six months
797	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
1,008	Number of Employees Supported by CEWS



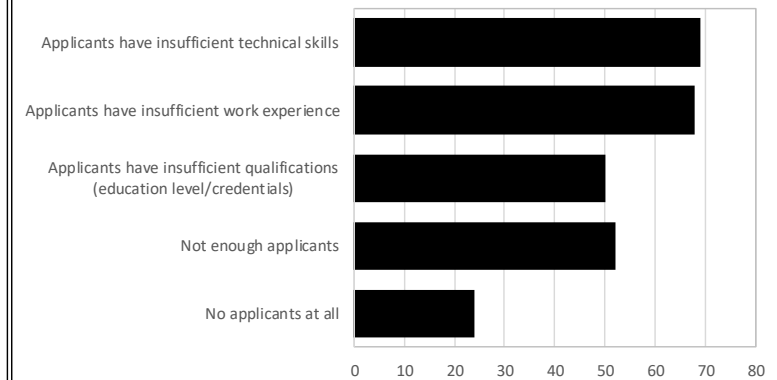
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



# INDUSTRY SECTOR OVERVIEW

Industry Sector: Educational services

Employment Totals by Industry Sector Chart

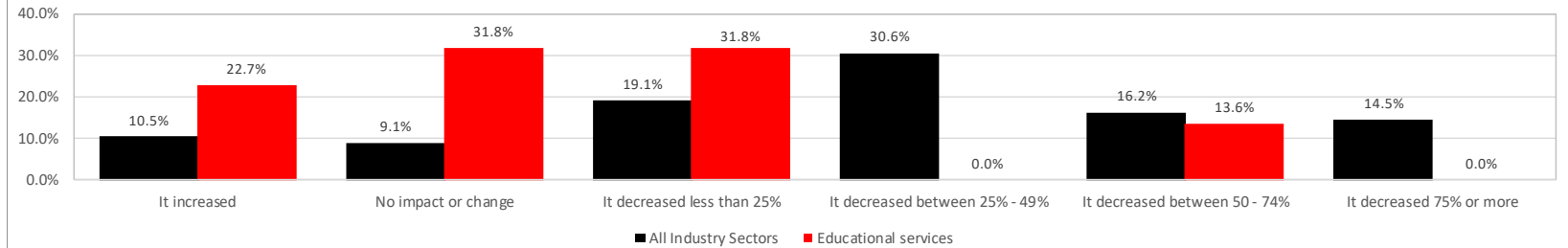
Number of Respondents	January 2021	January 2020	Change	Change %
28	4,352	4,520	-168	-3.7%

## Employment Insights

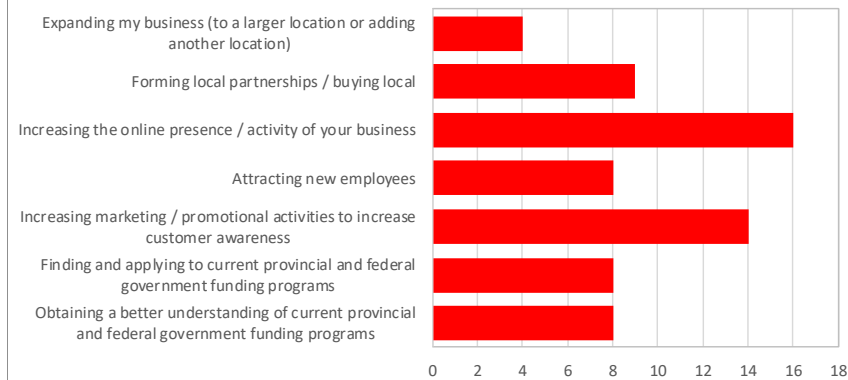
15	Number of responding companies hiring in next six months
53.6%	Percentage of responding Companies Hiring in the next six months
34	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
16	Number of Employees Supported by CEWS

**RESULTS BY  
INDUSTRY  
SECTOR**

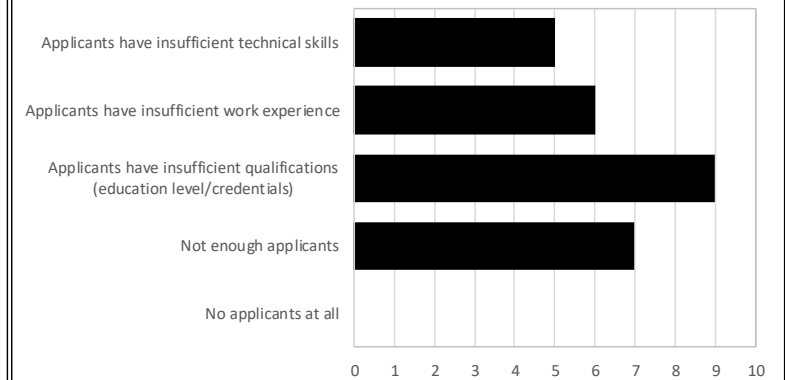
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



# INDUSTRY SECTOR OVERVIEW

Industry Sector: Finance and insurance

Employment Totals by Industry Sector Chart

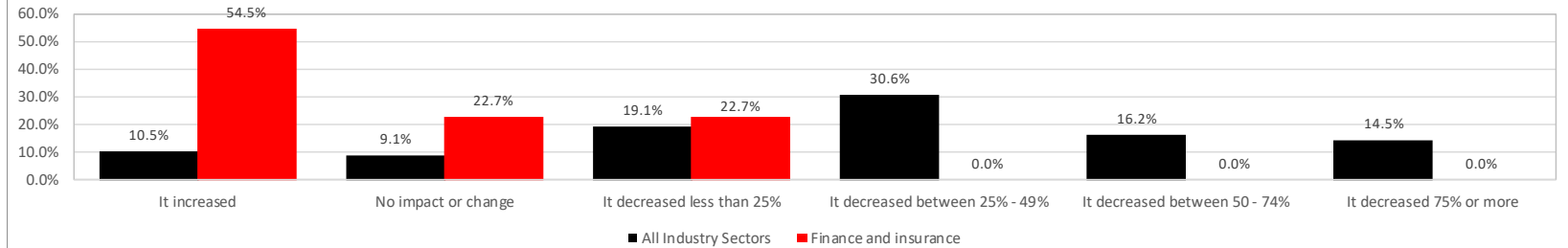
Number of Respondents	January 2021	January 2020	Change	Change %
24	858	835	23	2.8%

Employment Insights

13	Number of responding companies hiring in next six months
59.1%	Percentage of responding Companies Hiring in the next six months
40	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
269	Number of Employees Supported by CEWS

**RESULTS BY  
INDUSTRY  
SECTOR**

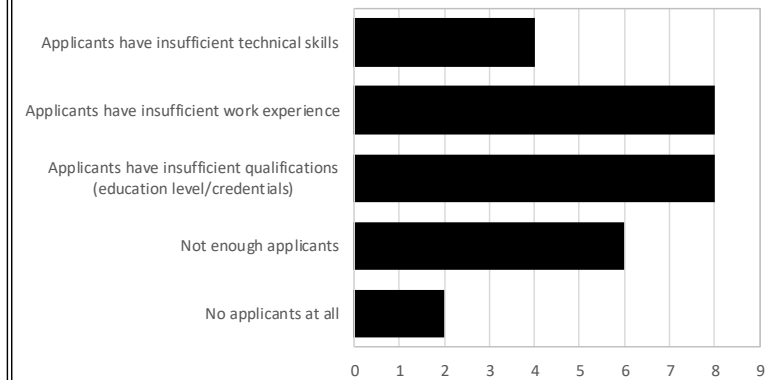
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



# INDUSTRY SECTOR OVERVIEW

**Industry Sector:** Health care and social assistance

**Employment Totals by Industry Sector Chart**

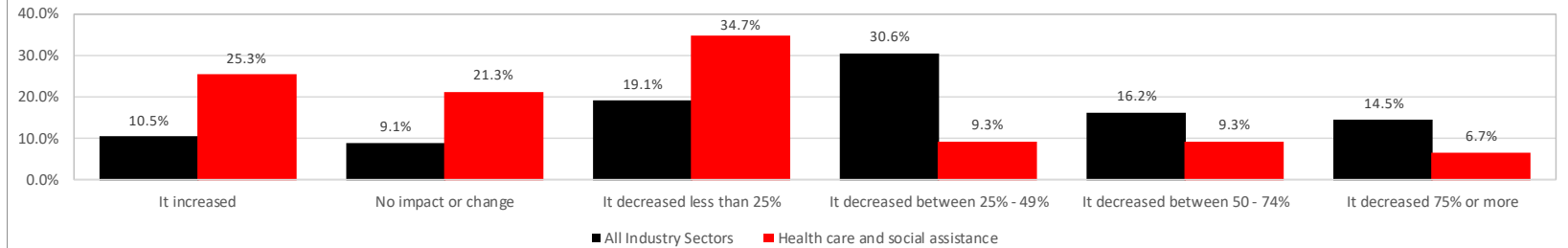
Number of Respondents	January 2021	January 2020	Change	Change %
94	4,212	4,425	-213	-4.8%

**Employment Insights**

49	Number of responding companies hiring in next six months
53.3%	Percentage of responding Companies Hiring in the next six months
-236	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
489	Number of Employees Supported by CEWS



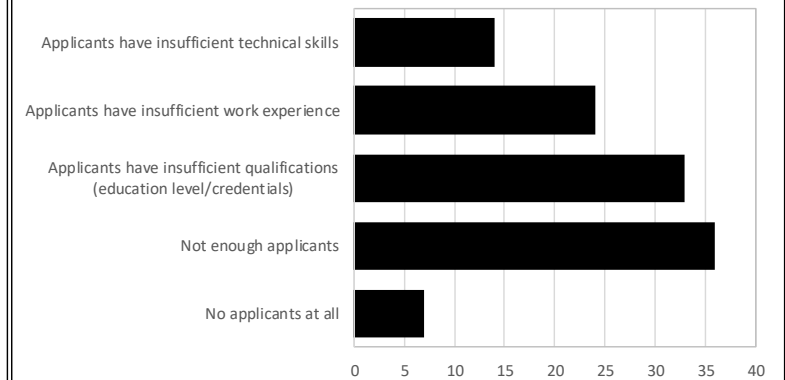
**Revenue Impact Comparative Analysis**



**Industry Sector Short Term Priorities**



**Industry Sector Hiring Constraints**



# INDUSTRY SECTOR OVERVIEW

Industry Sector: Manufacturing

Employment Totals by Industry Sector Chart

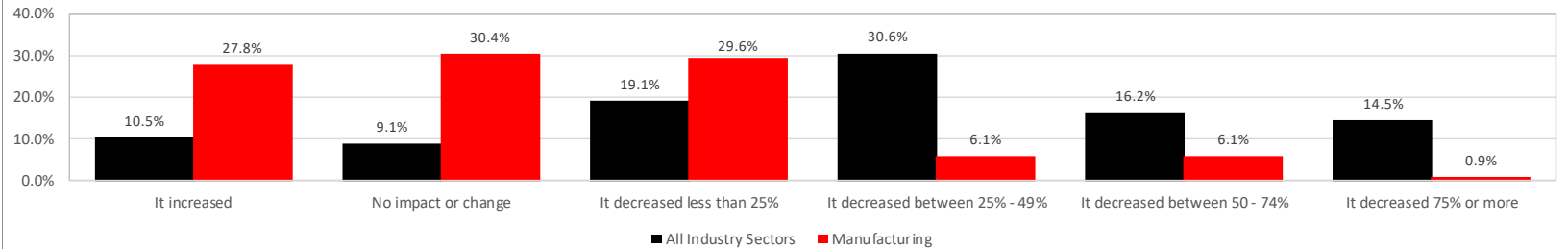
Number of Respondents	January 2021	January 2020	Change	Change %
121	14,969	15,789	-820	-5.2%

Employment Insights

85	Number of responding companies hiring in next six months
72.0%	Percentage of responding Companies Hiring in the next six months
496	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
869	Number of Employees Supported by CEWS

**RESULTS BY  
INDUSTRY  
SECTOR**

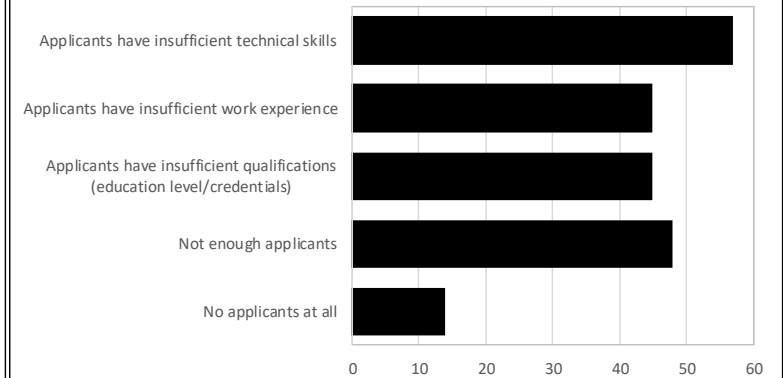
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints





# INDUSTRY SECTOR OVERVIEW

**Industry Sector:** Other services (except public administration)

**Employment Totals by Industry Sector Chart**

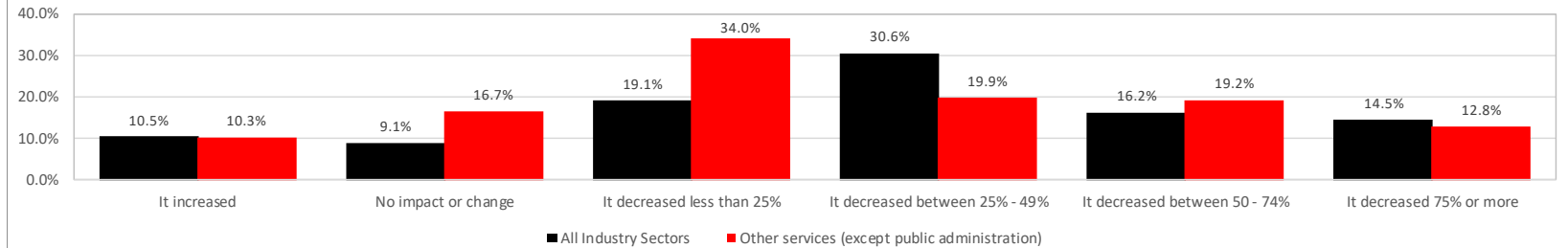
Number of Respondents	January 2021	January 2020	Change	Change %
191	5,581	5,920	-339	-5.7%

**Employment Insights**

67	Number of responding companies hiring in next six months
38.5%	Percentage of responding Companies Hiring in the next six months
873	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
303	Number of Employees Supported by CEWS



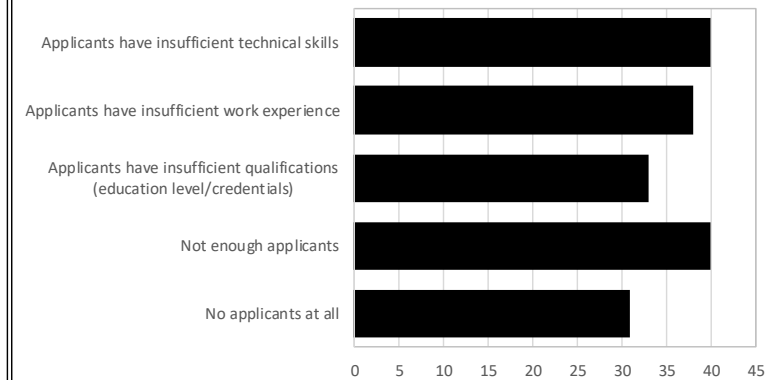
**Revenue Impact Comparative Analysis**



**Industry Sector Short Term Priorities**



**Industry Sector Hiring Constraints**



# INDUSTRY SECTOR OVERVIEW

**Industry Sector:** Professional, scientific and technical services

**Employment Totals by Industry Sector Chart**

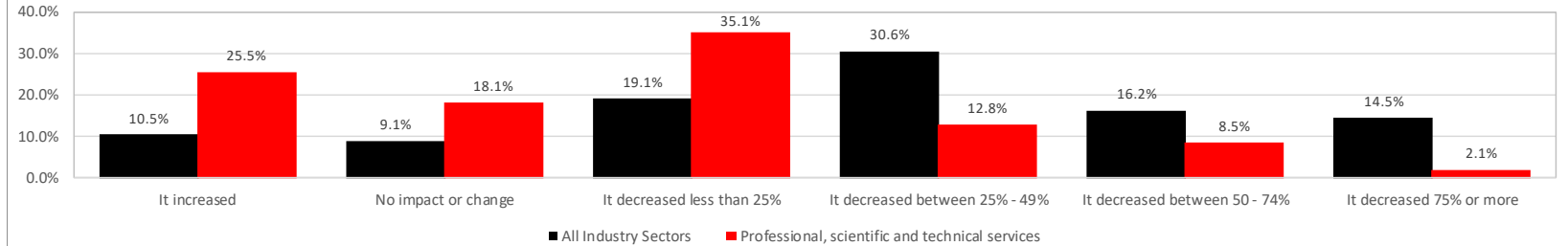
Number of Respondents	January 2021	January 2020	Change	Change %
103	1,437	1,575	-138	-8.8%

**Employment Insights**

43	Number of responding companies hiring in next six months
46.2%	Percentage of responding Companies Hiring in the next six months
-135	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
223	Number of Employees Supported by CEWS



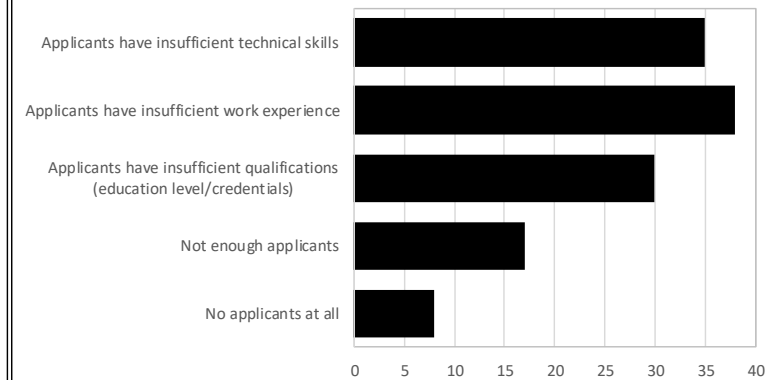
**Revenue Impact Comparative Analysis**



**Industry Sector Short Term Priorities**



**Industry Sector Hiring Constraints**



# INDUSTRY SECTOR OVERVIEW

Industry Sector: Real estate and rental and leasing

Employment Totals by Industry Sector Chart

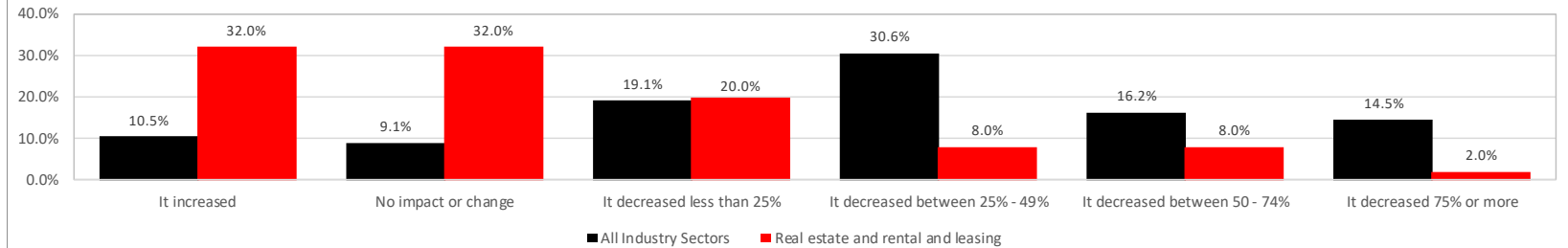
Number of Respondents	January 2021	January 2020	Change	Change %
57	858	889	-31	-3.5%

Employment Insights

14	Number of responding companies hiring in next six months
28.0%	Percentage of responding Companies Hiring in the next six months
-396	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
222	Number of Employees Supported by CEWS

**RESULTS BY  
INDUSTRY  
SECTOR**

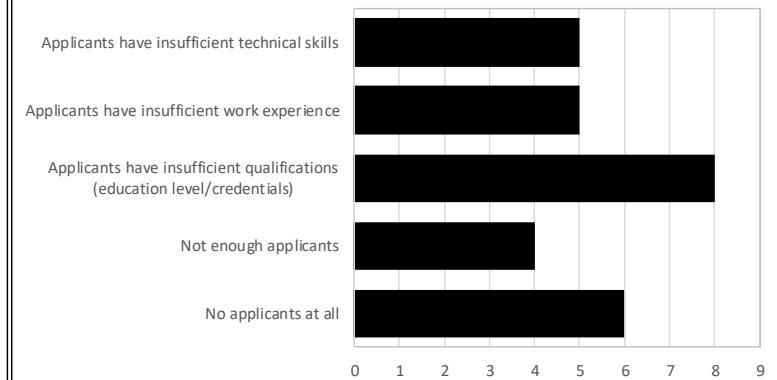
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



# INDUSTRY SECTOR OVERVIEW

Industry Sector: Retail trade

Employment Totals by Industry Sector Chart

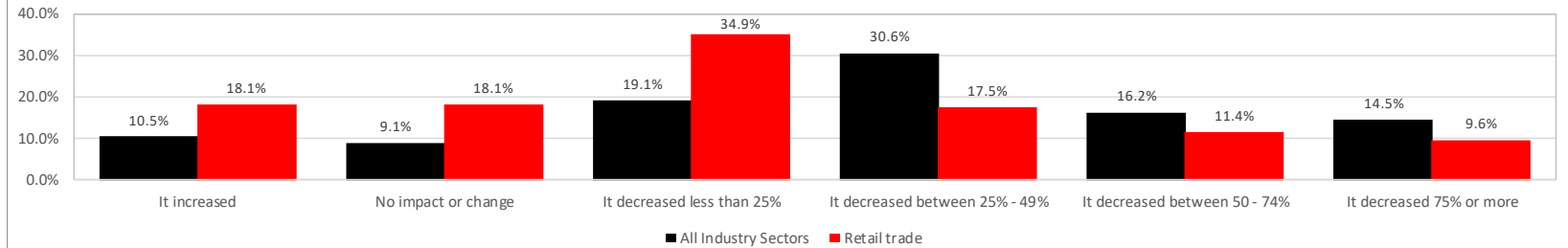
Number of Respondents	January 2021	January 2020	Change	Change %
199	2,484	2,775	-291	-10.5%

Employment Insights

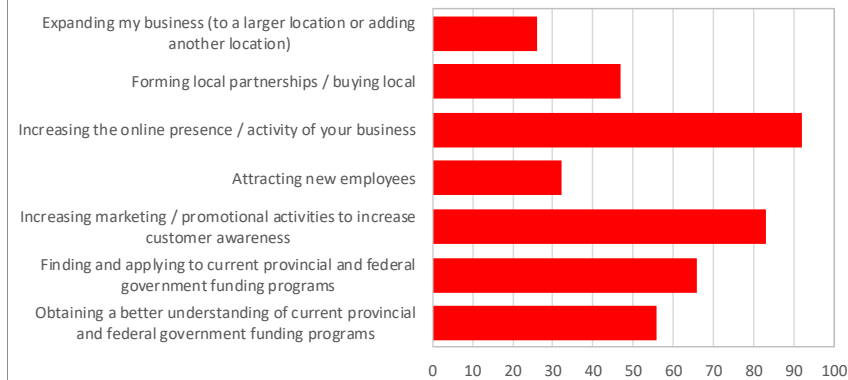
77	Number of responding companies hiring in next six months
41.6%	Percentage of responding Companies Hiring in the next six months
684	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
410	Number of Employees Supported by CEWS

**RESULTS BY  
INDUSTRY  
SECTOR**

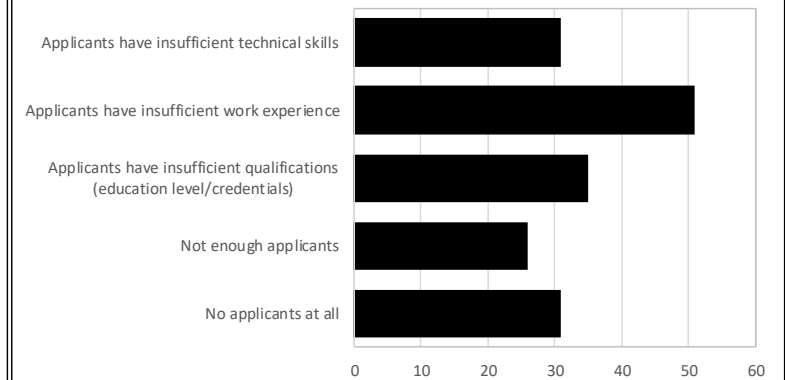
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



# INDUSTRY SECTOR OVERVIEW

Industry Sector: Transportation and warehousing

Employment Totals by Industry Sector Chart

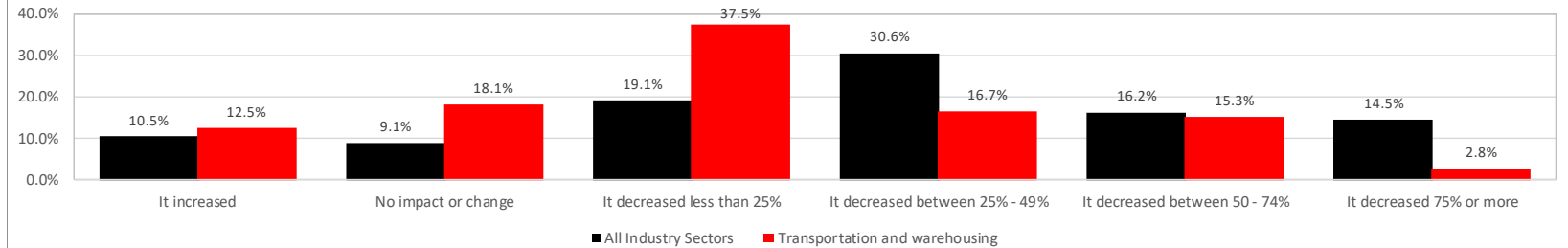
Number of Respondents	January 2021	January 2020	Change	Change %
79	1,853	2,624	-771	-29.4%

## Employment Insights

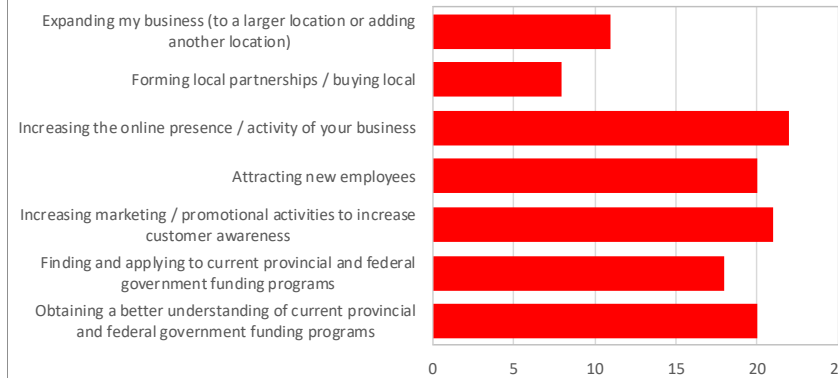
26	Number of responding companies hiring in next six months
36.6%	Percentage of responding Companies Hiring in the next six months
459	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
327	Number of Employees Supported by CEWS



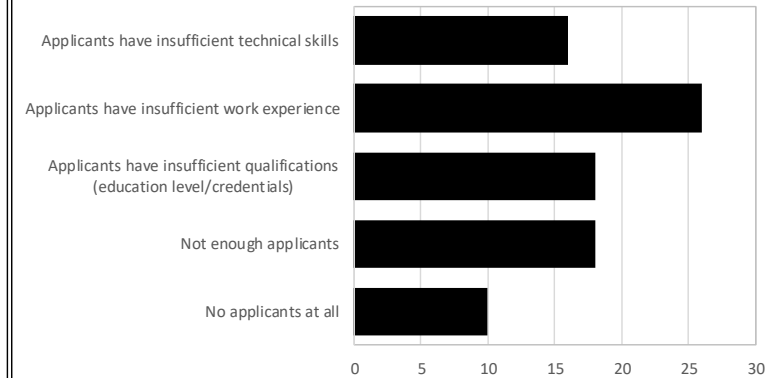
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



# INDUSTRY SECTOR OVERVIEW

Industry Sector: Wholesale trade

Employment Totals by Industry Sector Chart

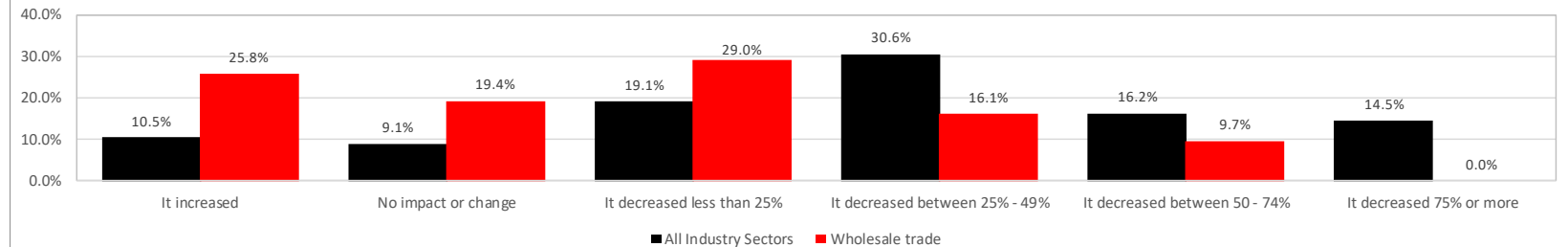
Number of Respondents	January 2021	January 2020	Change	Change %
32	587	687	-100	-14.6%

Employment Insights

17	Number of responding companies hiring in next six months
56.7%	Percentage of responding Companies Hiring in the next six months
-102	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
190	Number of Employees Supported by CEWS

**RESULTS BY  
INDUSTRY  
SECTOR**

Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints

