COMMUNICATION UPDATE

<table>
<thead>
<tr>
<th>TO</th>
<th>Mayor and Members City Council</th>
</tr>
</thead>
<tbody>
<tr>
<td>DATE:</td>
<td>April 15, 2021</td>
</tr>
<tr>
<td>WARD(S) AFFECTED:</td>
<td>City Wide</td>
</tr>
<tr>
<td>SUBMITTED BY:</td>
<td>Norm Schleehahn Director, Economic Development Planning and Economic Development</td>
</tr>
<tr>
<td>SIGNATURE:</td>
<td></td>
</tr>
</tbody>
</table>

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 Schleehahn, Director, Economic Development at (905) 546-2424 Ext. 2669 or via email at Norm.Schleehahn@hamilton.ca.
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 SCHLEEHANH - 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.
### Summary of Total Responses

<table>
<thead>
<tr>
<th>Data</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of qualified respondents</td>
<td>1546</td>
</tr>
<tr>
<td>Survey completion</td>
<td>50%</td>
</tr>
<tr>
<td>Average time spent</td>
<td>7m:10s</td>
</tr>
</tbody>
</table>
OUTREACH CHANNELS
Distribution of Survey Respondents by Ward

Distribution of Qualified Survey Respondents by Ward

- Respondents by Ward (April 2020 Survey)
- Respondents by Ward (February 2021 Survey)
Distribution of Survey Respondents by Industry Sector

Qualified Respondents by Industry Sector

- Accommodation and food services: 305
- Retail trade: 199
- Other services (except public administration): 191
- Construction: 159
- Manufacturing: 121
- Professional, scientific and technical services: 103
- Arts, entertainment and recreation: 94
- Health care and social assistance: 94
- Transportation and warehousing: 79
- Real estate and rental and leasing: 57
- Wholesale trade: 32
- Educational services: 28
- Finance and insurance: 24
- Agriculture, forestry, fishing and hunting: 17
- Administrative and support, waste management and remediation services: 14
- Utilities: 9
- Information and cultural industries: 8
- Public administration: 5
- Management of companies and enterprises: 4
- Mining, quarrying, and oil and gas extraction: 3
### Reported Impact on Employment Totals by Business Size

#### Change in Total Employment by Business Size

<table>
<thead>
<tr>
<th>Business Size</th>
<th>Total Employment as of January 2020</th>
<th>Total Employment as of January 2021</th>
<th>Total Employment Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Businesses With Under 100 Employees</td>
<td>15,812</td>
<td>-4,708</td>
<td>-7,745</td>
</tr>
<tr>
<td>Businesses With 100 or More Employees</td>
<td>37,866</td>
<td>53,678</td>
<td>15,812</td>
</tr>
<tr>
<td>Total</td>
<td>53,678</td>
<td>53,678</td>
<td>0</td>
</tr>
</tbody>
</table>
Reported Impact on Employment Totals by Business Size

Reported Total Employee Count Changes by Company Size

- Average Reported % Decrease (April 2020 Survey)
- Average Reported % Decrease (February 2021 Survey)
Reported Impact on Revenue (Compared to Previous Year Totals)

Reported Impact on Business Revenue in 2021 (Compared to Previous Year)

- It increased: 137
- No impact or change: 119
- It decreased less than 25%: 251
- It decreased between 25% - 49%: 401
- It decreased between 50% - 74%: 213
- It decreased 75% or more: 190
Reported Revenue Impact by Industry Sector

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

- Public administration
- Mining, quarrying, and oil and gas extraction
- Finance and insurance
- Educational services
- Agriculture, forestry, fishing and hunting
- Utilities
- Management of companies and enterprises
- Administrative and support, waste management and...
- Information and cultural industries
- Real estate and rental and leasing
- Wholesale trade
- Manufacturing
- Health care and social assistance
- Transportation and warehousing
- Professional, scientific and technical services
- Construction
- Arts, entertainment and recreation
- Retail trade
- Other services (except public administration)
- Accommodation and food services

- It decreased 75% or more
- It decreased between 50 - 74%
- It decreased between 25% - 49%
- It decreased less than 25%
- No impact or change
- It increased
### Forecasted Impact on Future Employment Totals by Business Size

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Number of Companies</th>
<th>How many employees does your business currently have? (January 2021)</th>
<th>How many employees did your business have in January 2020?</th>
<th>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)</th>
<th>Anticipated Change compared to pre-pandemic</th>
</tr>
</thead>
<tbody>
<tr>
<td>500 or more</td>
<td>14</td>
<td>19,785</td>
<td>21,772</td>
<td>21,702</td>
<td>-70</td>
</tr>
<tr>
<td>200 to 499</td>
<td>28</td>
<td>7,668</td>
<td>9,003</td>
<td>8,200</td>
<td>-803</td>
</tr>
<tr>
<td>100 to 199</td>
<td>53</td>
<td>5,705</td>
<td>7,091</td>
<td>7,231</td>
<td>140</td>
</tr>
<tr>
<td>50 to 99</td>
<td>65</td>
<td>3,870</td>
<td>4,414</td>
<td>4,337</td>
<td>-77</td>
</tr>
<tr>
<td>20 to 49</td>
<td>178</td>
<td>3,927</td>
<td>5,368</td>
<td>5,357</td>
<td>-11</td>
</tr>
<tr>
<td>10 to 19</td>
<td>216</td>
<td>2,240</td>
<td>2,869</td>
<td>2,850</td>
<td>-19</td>
</tr>
<tr>
<td>5 to 9</td>
<td>279</td>
<td>1,378</td>
<td>1,800</td>
<td>2,084</td>
<td>284</td>
</tr>
<tr>
<td>1 to 4</td>
<td>705</td>
<td>1,360</td>
<td>1,361</td>
<td>2,098</td>
<td>737</td>
</tr>
<tr>
<td>TOTAL</td>
<td>1538</td>
<td>45,933</td>
<td>53,678</td>
<td>53,859</td>
<td>181</td>
</tr>
</tbody>
</table>
Workforce Insights

Hiring Intentions by Job Type

- Service Workers: 778
- Trades (Journeyperson): 509
- Production Workers: 487
- Managers and Executives: 353
- Professionals: 331
- Apprentices: 290
- Technical: 262
- Sales and Marketing: 237
- Administrative and Clerical: 212

Number of Forecasted Positions
Workforce Insights

Number of Reported CEWS Supported Employees by Industry Sector

- Accommodation and food services: 1150
- Construction: 1008
- Manufacturing: 869
- Health care and social assistance: 489
- Retail trade: 410
- Transportation and warehousing: 327
- Other services (except public administration): 303
- Finance and insurance: 269
- Professional, scientific and technical services: 223
- Real estate and rental and leasing: 222
- Arts, entertainment and recreation: 222
- Wholesale trade: 190
- Administrative and support, waste management and remediation services: 114
- Agriculture, forestry, fishing and hunting: 72
- Management of companies and enterprises: 20

Bar chart showing the number of reported CEWS supported employees by industry sector.
**RESPONDENT BUSINESS PRIORITIES FOR 2021**

1. **Increasing the online presence of their business**: 586
2. **Increasing marketing / promotional activities**: 575
3. **Finding and applying to government funding programs**: 473
4. **Attracting new employees**: 396
5. **Forming local partnerships and buying local**: 308
6. **Business expansion**: 227

**CALL TO ACTION**
Intended Future Engagement

Respondents Interested in Participating in Future Surveys

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

The e-distribution list has not seen this many new subscribers in the past 3 years combined.
THANK YOU
Norm Schleehahn
Director, Economic Development Division
norm.schleehahn@hamilton.ca
WWW.INVESTINHAMILTON.CA
APPENDICIES

Current/Future Employment Figures
All Industries
# Current and Forecasted Impact on Employment by Industry Sector

<table>
<thead>
<tr>
<th>Industry Sector</th>
<th>Employee Count January 2021</th>
<th>Employee Count January 2020</th>
<th>Forecasted Employee Count When all restrictions are lifted</th>
<th>Change 2020 vs 2021</th>
<th>% Change 2020 vs 2021</th>
<th>Change 2021 vs. When Restrictions are lifted</th>
<th>% Change 2021 vs. When all Restrictions are lifted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation and food services</td>
<td>305</td>
<td>2,812</td>
<td>6,804</td>
<td>-3,992</td>
<td>-58.70%</td>
<td>4,043</td>
<td>51</td>
</tr>
<tr>
<td>Retail trade</td>
<td>199</td>
<td>2,484</td>
<td>2,775</td>
<td>-291</td>
<td>-10.50%</td>
<td>684</td>
<td>393</td>
</tr>
<tr>
<td>Other services (except public administration)</td>
<td>191</td>
<td>5,581</td>
<td>6,454</td>
<td>-872</td>
<td>-5.70%</td>
<td>873</td>
<td>534</td>
</tr>
<tr>
<td>Construction</td>
<td>159</td>
<td>3,506</td>
<td>4,303</td>
<td>-797</td>
<td>-18.00%</td>
<td>797</td>
<td>491</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>121</td>
<td>14,969</td>
<td>15,465</td>
<td>-502</td>
<td>-3.30%</td>
<td>496</td>
<td>-324</td>
</tr>
<tr>
<td>Professional, scientific and technical services</td>
<td>103</td>
<td>1,437</td>
<td>1,302</td>
<td>-138</td>
<td>-8.80%</td>
<td>-135</td>
<td>-273</td>
</tr>
<tr>
<td>Arts, entertainment and recreation</td>
<td>94</td>
<td>2,124</td>
<td>2,324</td>
<td>-198</td>
<td>-8.60%</td>
<td>-198</td>
<td>-9.00%</td>
</tr>
<tr>
<td>Health care and social assistance</td>
<td>94</td>
<td>4,212</td>
<td>4,129</td>
<td>-173</td>
<td>-4.10%</td>
<td>-173</td>
<td>-4.10%</td>
</tr>
<tr>
<td>Transportation and warehousing</td>
<td>79</td>
<td>1,853</td>
<td>2,312</td>
<td>-461</td>
<td>-24.20%</td>
<td>-461</td>
<td>-24.20%</td>
</tr>
<tr>
<td>Real estate and rental and leasing</td>
<td>57</td>
<td>858</td>
<td>462</td>
<td>-396</td>
<td>-35.00%</td>
<td>-427</td>
<td>-48.00%</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>32</td>
<td>587</td>
<td>485</td>
<td>-100</td>
<td>-13.70%</td>
<td>-102</td>
<td>-20.00%</td>
</tr>
<tr>
<td>Educational services</td>
<td>28</td>
<td>4,352</td>
<td>4,386</td>
<td>-36</td>
<td>-0.80%</td>
<td>-36</td>
<td>-0.80%</td>
</tr>
<tr>
<td>Finance and insurance</td>
<td>24</td>
<td>858</td>
<td>898</td>
<td>34</td>
<td>3.80%</td>
<td>34</td>
<td>-0.70%</td>
</tr>
<tr>
<td>Agriculture, forestry, fishing and hunting</td>
<td>17</td>
<td>561</td>
<td>320</td>
<td>23</td>
<td>3.50%</td>
<td>23</td>
<td>7.00%</td>
</tr>
<tr>
<td>Administrative and support, waste management and remediation services</td>
<td>14</td>
<td>556</td>
<td>728</td>
<td>-156</td>
<td>-22.00%</td>
<td>-156</td>
<td>-22.00%</td>
</tr>
<tr>
<td>Utilities</td>
<td>9</td>
<td>98</td>
<td>118</td>
<td>20</td>
<td>16.90%</td>
<td>20</td>
<td>-16.90%</td>
</tr>
<tr>
<td>Information and cultural industries</td>
<td>8</td>
<td>20</td>
<td>27</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>Public administration</td>
<td>5</td>
<td>116</td>
<td>128</td>
<td>-18</td>
<td>-14.70%</td>
<td>-18</td>
<td>-14.70%</td>
</tr>
<tr>
<td>Management of companies and enterprises</td>
<td>4</td>
<td>39</td>
<td>57</td>
<td>18</td>
<td>-31.60%</td>
<td>18</td>
<td>1.80%</td>
</tr>
<tr>
<td>Mining, quarrying, and oil and gas extraction</td>
<td>3</td>
<td>9</td>
<td>10</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>1546</td>
<td>45,929</td>
<td>54,341</td>
<td>-8,412</td>
<td>-15.50%</td>
<td>7,930</td>
<td>-482</td>
</tr>
</tbody>
</table>

**Forecasted Employee Count When all restrictions are lifted**

**Change 2021 vs. When Restrictions are lifted**

**% Change 2020 vs. When all Restrictions are lifted**

**% Change 2021 vs. When Restrictions are lifted**
APPENDICIES

Select Industry Sector Information
For all Industry Sectors with 15+ Respondents
Industry Sector: Accommodation and food services

**Employment Totals by Industry Sector Chart**

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>305</td>
<td>2,812</td>
<td>6,804</td>
<td>-3,992</td>
<td>-58.7%</td>
</tr>
</tbody>
</table>

**Employment Insights**

- **Number of responding companies hiring in next six months:** 176
- **Percentage of responding Companies Hiring in the next six months:** 61.8%
- **Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020):** 404 3
- **Number of Employees Supported by CEWS:**
  - All Industry Sectors: 10.8%
  - Accommodation and food services: 11.0%

**Revenue Impact Comparative Analysis**

- It increased: 10.5%, 9.8%
- No impact or change: 10.1%, 10.6%
- It decreased less than 25%: 12.1%, 13.5%
- It decreased between 25% - 49%: 30.6%, 30.2%
- It decreased between 50 - 74%: 16.3%, 15.4%
- It decreased 75% or more: 14.5%, 20.3%

**Industry Sector Short Term Priorities**

- Expanding my business (to a larger location or adding another location)
- Forming local partnerships / buying local
- Increasing the online presence / activity of your business
- Attracting new employees
- Increasing marketing / promotional activities to increase customer awareness
- Finding and applying to current provincial and federal government funding programs
- Obtaining a better understanding of current provincial and federal government funding programs

**Industry Sector Hiring Constraints**

- Applicants have insufficient technical skills
- Applicants have insufficient work experience
- Applicants have insufficient qualifications (education level/credentials)
- Not enough applicants
- No applicants at all
INDUSTRY SECTOR OVERVIEW

Industry Sector: Agriculture, forestry, fishing and hunting

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>368</td>
<td>320</td>
<td>48</td>
<td>15.0%</td>
</tr>
</tbody>
</table>

Employment Insights

<table>
<thead>
<tr>
<th></th>
<th>Number of responding companies hiring in next six months</th>
<th>Percentage of responding Companies Hiring in the next six months</th>
<th>Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)</th>
<th>Number of Employees Supported by CEWS</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>58.8%</td>
<td>77</td>
<td>72</td>
<td>66.7%</td>
</tr>
</tbody>
</table>

Revenue Impact Comparative Analysis

- It increased: 66.7%
- No impact or change: 20.0%
- It decreased less than 25%: 19.3%
- It decreased between 25% - 49%: 30.6%
- It decreased between 50% - 74%: 0.0%
- It decreased 75% or more: 6.7%

Industry Sector Short Term Priorities

- Expanding my business (to a larger location or adding another location)
- Forming local partnerships / buying local
- Increasing the online presence / activity of your business
- Attracting new employees
- Increasing marketing / promotional activities to increase customer awareness
- Finding and applying to current provincial and federal government funding programs
- Obtaining a better understanding of current provincial and federal government funding programs

Industry Sector Hiring Constraints

- Applicants have insufficient technical skills
- Applicants have insufficient work experience
- Applicants have insufficient qualifications (education level/credentials)
- Not enough applicants
- No applicants at all
**INDUSTRY SECTOR OVERVIEW**

Industry Sector: Arts, entertainment and recreation

**Employment Totals by Industry Sector Chart**

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>94</td>
<td>1,214</td>
<td>2,328</td>
<td>-1,114</td>
<td>-47.9%</td>
</tr>
</tbody>
</table>

**Employment Insights**

<table>
<thead>
<tr>
<th></th>
<th>Number of responding companies hiring in next six months</th>
<th>Percentage of responding Companies Hiring in the next six months</th>
<th>Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)</th>
<th>Number of Employees Supported by CEWS</th>
</tr>
</thead>
<tbody>
<tr>
<td>38</td>
<td></td>
<td>44.2%</td>
<td>1110</td>
<td>222</td>
</tr>
<tr>
<td>1,214</td>
<td></td>
<td>7.4%</td>
<td>18.2%</td>
<td>45.7%</td>
</tr>
</tbody>
</table>

**Revenue Impact Comparative Analysis**

- It increased: 10.5% (All Industry Sectors), 7.4% (Arts, entertainment and recreation)
- No impact or change: 7.4% (All Industry Sectors), 7.4% (Arts, entertainment and recreation)
- It decreased less than 25%: 19.1% (All Industry Sectors), 11.0% (Arts, entertainment and recreation)
- It decreased between 25% - 49%: 35.6% (All Industry Sectors)
- It decreased between 50 - 74%: 18.5% (All Industry Sectors)
- It decreased 75% or more: 14.5% (All Industry Sectors), 8.6% (Arts, entertainment and recreation)

**Industry Sector Short Term Priorities**

- Expanding my business (to a larger location or adding another location)
- Forming local partnerships / buying local
- Increasing the online presence / activity of your business
- Attracting new employees
- Increasing marketing / promotional activities to increase customer awareness
- Finding and applying to current provincial and federal government funding programs
- Obtaining a better understanding of current provincial and federal government funding programs

**Industry Sector Hiring Constraints**

- Applicants have insufficient technical skills
- Applicants have insufficient work experience
- Applicants have insufficient qualifications (education level/credentials)
- Not enough applicants
- No applicants at all
INDUSTRY SECTOR OVERVIEW

Industry Sector: Construction

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>159</td>
<td>3,506</td>
<td>3,812</td>
<td>-306</td>
<td>-8.0%</td>
</tr>
</tbody>
</table>

Employment Insights

- Number of responding companies hiring in next six months: 102
- Percentage of responding companies hiring in the next six months: 71.3%
- Forecasted total change in employment for responding companies: 797
- Number of employees supported by CEWS: 1,008

Revenue Impact Comparative Analysis

- It increased: 10.5%
- No impact or change: 25.7%
- It decreased less than 25%: 24.3%
- It decreased between 25% - 49%: 19.1%
- It decreased between 50% - 74%: 12.5%
- It decreased 75% or more: 10.6%

Industry Sector Short Term Priorities

- Expanding my business (to a larger location or adding another location): 9.1%
- Forming local partnerships / buying local: 26.3%
- Increasing the online presence / activity of your business: 32.3%
- Attracting new employees: 17.9%
- Increasing marketing / promotional activities to increase customer awareness: 10.1%
- Finding and applying to current provincial and federal government funding programs: 10.5%
- Obtaining a better understanding of current provincial and federal government funding programs: 26.3%

Industry Sector Hiring Constraints

- Applicants have insufficient technical skills: 8.6%
- Applicants have insufficient work experience: 8.6%
- Applicants have insufficient qualifications (education level/credentials): 16.3%
- Not enough applicants: 8.6%
- No applicants at all: 5.0%
INDUSTRY SECTOR OVERVIEW

Industry Sector: Educational services

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>28</td>
<td>4,352</td>
<td>4,520</td>
<td>-168</td>
<td>-3.7%</td>
</tr>
</tbody>
</table>

Employment Insights

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

Revenue Impact Comparative Analysis

- It increased: 10.5%
- No impact or change: 9.1%
- It decreased less than 25%: 11.8%
- It decreased between 25% - 49%: 31.8%
- It decreased between 50 - 74%: 14.5%
- It decreased 75% or more: 0.0%

Industry Sector Short Term Priorities

- Expanding my business (to a larger location or adding another location)
- Forming local partnerships / buying local
- Increasing the online presence / activity of your business
- Attracting new employees
- Increasing marketing / promotional activities to increase customer awareness
- Finding and applying to current provincial and federal government funding programs
- Obtaining a better understanding of current provincial and federal government funding programs

Industry Sector Hiring Constraints

- Applicants have insufficient technical skills
- Applicants have insufficient work experience
- Applicants have insufficient qualifications (education level/credentials)
- Not enough applicants
- No applicants at all
## INDUSTRY SECTOR OVERVIEW

### Industry Sector: Finance and insurance

#### Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>858</td>
<td>835</td>
<td>23</td>
<td>2.8%</td>
</tr>
</tbody>
</table>

#### Employment Insights

- **13** respondents
- **59.1%** of respondents expect to hire in the next six months
- **40** companies forecasted total change in employment
- **269** employees supported by CEWS

#### Revenue Impact Comparative Analysis

- **10.5%** increased
- **22.7%** decreased less than 25%
- **19.1%** decreased 25% - 49%
- **30.6%** decreased 50% - 74%
- **14.5%** decreased 75% or more

#### Industry Sector Short Term Priorities

- Expanding business (to a larger location or adding another location)
- Forming local partnerships / buying local
- Increasing marketing / promotional activities to increase customer awareness
- Attracting new employees
- Increasing the online presence / activity of your business
- Finding and applying to current provincial and federal government funding programs
- Obtaining a better understanding of current provincial and federal government funding programs

#### Industry Sector Hiring Constraints

- Applicants have insufficient technical skills
- Applicants have insufficient work experience
- Applicants have insufficient qualifications (education level/credentials)
- Applicants have insufficient work experience
- Not enough applicants
- No applicants at all
INDUSTRY SECTOR OVERVIEW

Industry Sector: Health care and social assistance

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>94</td>
<td>4,212</td>
<td>4,425</td>
<td>-213</td>
<td>-4.8%</td>
</tr>
</tbody>
</table>

Employment Insights

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

Revenue Impact Comparative Analysis

- It increased: 10.5%
- No impact or change: 25.3%
- It decreased less than 25%: 21.3%
- It decreased between 25% - 49%: 19.1%
- It decreased between 50% - 74%: 34.7%
- It decreased 75% or more: 9.3%

Industry Sector Short Term Priorities

- Expanding my business (to a larger location or adding another location): 10.5%
- Forming local partnerships / buying local: 25.3%
- Increasing the online presence / activity of your business: 21.3%
- Attracting new employees: 19.1%
- Increasing marketing / promotional activities to increase customer awareness: 34.7%
- Finding and applying to current provincial and federal government funding programs: 9.3%
- Obtaining a better understanding of current provincial and federal government funding programs: 6.7%

Industry Sector Hiring Constraints

- Applicants have insufficient technical skills: 14.5%
- Applicants have insufficient work experience: 9.1%
- Applicants have insufficient qualifications (education level/credentials): 16.2%
- Applicants have insufficient work experience (education level/credentials): 14.5%
- Not enough applicants: 30.6%
- No applicants at all: 16.2%
INDUSTRY SECTOR OVERVIEW

Industry Sector: Manufacturing

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Industry Sector</th>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>121</td>
<td>14,969</td>
<td>15,789</td>
<td>-820</td>
<td>-5.2%</td>
</tr>
</tbody>
</table>

Employment Insights

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of responding companies hiring in next six months</td>
<td>85</td>
</tr>
<tr>
<td>Percentage of responding companies hiring in the next six months</td>
<td>72.0%</td>
</tr>
<tr>
<td>Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)</td>
<td>496</td>
</tr>
<tr>
<td>Number of Employees Supported by CEWS</td>
<td>869</td>
</tr>
</tbody>
</table>

Revenue Impact Comparative Analysis

<table>
<thead>
<tr>
<th>Revenue Impact</th>
<th>All Industry Sectors</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>It increased</td>
<td>10.5%</td>
<td>27.8%</td>
</tr>
<tr>
<td>No impact or change</td>
<td>0.1%</td>
<td>10.4%</td>
</tr>
<tr>
<td>It decreased less than 25%</td>
<td>19.1%</td>
<td>29.6%</td>
</tr>
<tr>
<td>It decreased between 25% - 49%</td>
<td>30.6%</td>
<td>6.1%</td>
</tr>
<tr>
<td>It decreased between 50% - 74%</td>
<td>16.2%</td>
<td>6.1%</td>
</tr>
<tr>
<td>It decreased 75% or more</td>
<td>0.9%</td>
<td>0.9%</td>
</tr>
</tbody>
</table>

Industry Sector Short Term Priorities

<table>
<thead>
<tr>
<th>Priorities</th>
<th>All Industry Sectors</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanding my business (to a larger location or adding another location)</td>
<td>20%</td>
<td>40%</td>
</tr>
<tr>
<td>Forming local partnerships / buying local</td>
<td>40%</td>
<td>20%</td>
</tr>
<tr>
<td>Increasing the online presence / activity of your business</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Attracting new employees</td>
<td>40%</td>
<td>20%</td>
</tr>
<tr>
<td>Increasing marketing / promotional activities to increase customer awareness</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Finding and applying to current provincial and federal government funding programs</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Obtaining a better understanding of current provincial and federal government funding programs</td>
<td>60%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Industry Sector Hiring Constraints

<table>
<thead>
<tr>
<th>Constraints</th>
<th>All Industry Sectors</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicants have insufficient technical skills</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Applicants have insufficient work experience</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Applicants have insufficient qualifications (education level/credit level)</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Not enough applicants</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>No applicants at all</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>
INDUSTRY SECTOR OVERVIEW

Industry Sector: Other services (except public administration)

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>191</td>
<td>5,581</td>
<td>5,920</td>
<td>-339</td>
<td>-5.7%</td>
</tr>
</tbody>
</table>

Employment Insights

<table>
<thead>
<tr>
<th>Number of responding companies hiring in next six months</th>
<th>Percentage of responding Companies Hiring in the next six months</th>
<th>Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)</th>
<th>Number of Employees Supported by CEWS</th>
</tr>
</thead>
<tbody>
<tr>
<td>67</td>
<td>38.5%</td>
<td>It increased</td>
<td>10.3%</td>
</tr>
<tr>
<td>873</td>
<td>46.3%</td>
<td>No impact or change</td>
<td>10.5%</td>
</tr>
<tr>
<td>303</td>
<td>25.2%</td>
<td>It decreased less than 25%</td>
<td>16.7%</td>
</tr>
<tr>
<td>233</td>
<td>32.5%</td>
<td>It decreased between 25% - 49%</td>
<td>19.1%</td>
</tr>
<tr>
<td>383</td>
<td>41.2%</td>
<td>It decreased between 50 - 74%</td>
<td>16.2%</td>
</tr>
<tr>
<td>113</td>
<td>14.1%</td>
<td>It decreased 75% or more</td>
<td>12.8%</td>
</tr>
</tbody>
</table>

Revenue Impact Comparative Analysis

<table>
<thead>
<tr>
<th>All Industry Sectors</th>
<th>Other services (except public administration)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.5%</td>
<td>10%</td>
</tr>
<tr>
<td>10.3%</td>
<td>10%</td>
</tr>
<tr>
<td>9.1%</td>
<td>10%</td>
</tr>
<tr>
<td>16.7%</td>
<td>16.2%</td>
</tr>
<tr>
<td>19.1%</td>
<td>19.2%</td>
</tr>
<tr>
<td>14.0%</td>
<td>14.5%</td>
</tr>
<tr>
<td>30.6%</td>
<td>30.6%</td>
</tr>
<tr>
<td>16.3%</td>
<td>16.2%</td>
</tr>
<tr>
<td>19.3%</td>
<td>19.9%</td>
</tr>
<tr>
<td>12.8%</td>
<td>12.8%</td>
</tr>
</tbody>
</table>

Industry Sector Short Term Priorities

<table>
<thead>
<tr>
<th>Priorities</th>
<th>All Industry Sectors</th>
<th>Other services (except public administration)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanding my business (to a larger location or adding another location)</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Forming local partnerships / buying local</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Increasing the online presence / activity of your business</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>Attracting new employees</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>Increasing marketing / promotional activities to increase customer awareness</td>
<td>60</td>
<td>60</td>
</tr>
<tr>
<td>Finding and applying to current provincial and federal government funding programs</td>
<td>70</td>
<td>70</td>
</tr>
<tr>
<td>Obtaining a better understanding of current provincial and federal government funding programs</td>
<td>80</td>
<td>80</td>
</tr>
</tbody>
</table>

Industry Sector Hiring Constraints

<table>
<thead>
<tr>
<th>Constraints</th>
<th>All Industry Sectors</th>
<th>Other services (except public administration)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicants have insufficient technical skills</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>Applicants have insufficient work experience</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Applicants have insufficient qualifications (education level/credential level)</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Not enough applicants</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>No applicants at all</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>
RESULTS BY INDUSTRY SECTOR

Industry Sector: Professional, scientific and technical services

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>103</td>
<td>1,437</td>
<td>1,575</td>
<td>-138</td>
<td>-8.8%</td>
</tr>
</tbody>
</table>

Employment Insights

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

Revenue Impact Comparative Analysis

- It increased: 10.5%
- No impact or change: 25.5%
- It decreased less than 25%: 18.1%
- It decreased between 25% - 49%: 19.1%
- It decreased between 50 - 74%: 15.1%
- It decreased 75% or more: 10.5%

Industry Sector Short Term Priorities

- Expanding my business (to a larger location or adding another location): 0%
- Forming local partnerships / buying local: 10%
- Increasing the online presence / activity of your business: 20%
- Attracting new employees: 15%
- Increasing marketing / promotional activities to increase customer awareness: 30%
- Finding and applying to current provincial and federal government funding programs: 35%
- Obtaining a better understanding of current provincial and federal government funding programs: 40%

Industry Sector Hiring Constraints

- Applicants have insufficient technical skills: 40%
- Applicants have insufficient work experience: 35%
- Applicants have insufficient qualifications (education level/credentials): 30%
- Not enough applicants: 25%
- No applicants at all: 0%
INDUSTRY SECTOR OVERVIEW

Industry Sector: Real estate and rental and leasing

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>57</td>
<td>858</td>
<td>889</td>
<td>-31</td>
<td>-3.5%</td>
</tr>
</tbody>
</table>

Employment Insights

- Number of responding companies hiring in next six months: 14
- Percentage of responding companies hiring in the next six months: 26.0%
- Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020): -396
- Number of Employees Supported by CEWS

Revenue Impact Comparative Analysis

- It increased: 10.5%
- No impact or change: 9.1%
- It decreased less than 25%: 13.0%
- It decreased between 25% - 49%: 19.1%
- It decreased between 50% - 74%: 20.0%
- It decreased 75% or more: 15.6%

Industry Sector Short Term Priorities

- Expanding my business (to a larger location or adding another location)
- Forming local partnerships / buying local
- Increasing the online presence / activity of your business
- Attracting new employees
- Increasing marketing / promotional activities to increase customer awareness
- Finding and applying to current provincial and federal government funding programs
- Obtaining a better understanding of current provincial and federal government funding programs

Industry Sector Hiring Constraints

- Applicants have insufficient technical skills
- Applicants have insufficient work experience
- Applicants have insufficient qualifications (education level/credentials)
- Not enough applicants
- No applicants at all
INDUSTRY SECTOR OVERVIEW

Industry Sector: Retail trade

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>199</td>
<td>2,484</td>
<td>2,775</td>
<td>-291</td>
<td>-10.5%</td>
</tr>
</tbody>
</table>

Employment Insights

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>77</td>
<td>Number of responding companies hiring in next six months</td>
</tr>
<tr>
<td>41.6%</td>
<td>Percentage of responding companies hiring in the next six months</td>
</tr>
<tr>
<td>684</td>
<td>Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)</td>
</tr>
<tr>
<td>410</td>
<td>Number of Employees Supported by CEWS</td>
</tr>
</tbody>
</table>

Revenue Impact Comparative Analysis

<table>
<thead>
<tr>
<th>Impact</th>
<th>All Industry Sectors</th>
<th>Retail trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>It increased</td>
<td>10.5%</td>
<td>10.5%</td>
</tr>
<tr>
<td>No impact or change</td>
<td>18.1%</td>
<td>17.5%</td>
</tr>
<tr>
<td>It decreased less than 25%</td>
<td>18.1%</td>
<td>16.2%</td>
</tr>
<tr>
<td>It decreased between 25% - 49%</td>
<td>19.1%</td>
<td>16.2%</td>
</tr>
<tr>
<td>It decreased between 50% - 74%</td>
<td>30.6%</td>
<td>11.4%</td>
</tr>
<tr>
<td>It decreased 75% or more</td>
<td>14.5%</td>
<td>9.6%</td>
</tr>
</tbody>
</table>

Industry Sector Short Term Priorities

<table>
<thead>
<tr>
<th>Priority</th>
<th>All Industry Sectors</th>
<th>Retail trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanding my business (to a larger location or adding another location)</td>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>Forming local partnerships / buying local</td>
<td>10</td>
<td>30</td>
</tr>
<tr>
<td>Increasing the online presence / activity of your business</td>
<td>10</td>
<td>50</td>
</tr>
<tr>
<td>Attracting new employees</td>
<td>30</td>
<td>40</td>
</tr>
<tr>
<td>Increasing marketing / promotional activities to increase customer awareness</td>
<td>50</td>
<td>70</td>
</tr>
<tr>
<td>Finding and applying to current provincial and federal government funding programs</td>
<td>60</td>
<td>80</td>
</tr>
<tr>
<td>Obtaining a better understanding of current provincial and federal government funding programs</td>
<td>90</td>
<td>100</td>
</tr>
</tbody>
</table>

Industry Sector Hiring Constraints

<table>
<thead>
<tr>
<th>Constraint</th>
<th>All Industry Sectors</th>
<th>Retail trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicants have insufficient technical skills</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Applicants have insufficient work experience</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Applicants have insufficient qualifications (education level/credentials)</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Not enough applicants</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>No applicants at all</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>
INDUSTRY SECTOR OVERVIEW

Industry Sector: Transportation and warehousing

Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>79</td>
<td>1,853</td>
<td>2,624</td>
<td>-771</td>
<td>-29.4%</td>
</tr>
</tbody>
</table>

Employment Insights

- Number of responding companies hiring in next six months: 26
- Percentage of responding companies hiring in the next six months: 36.6%
- Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020): 459
- Number of employees supported by CEWS: 12.5%

Revenue Impact Comparative Analysis

- It increased 10.5%
- No impact or change 12.5%
- It decreased less than 25% 9.1%
- It decreased between 25% - 49% 18.1%
- It decreased between 50% - 74% 19.1%
- It decreased 75% or more 10.6%

Industry Sector Short Term Priorities

- Expanding my business (to a larger location or adding another location) 5%
- Forming local partnerships / buying local 10%
- Increasing the online presence / activity of your business 15%
- Attracting new employees 20%
- Increasing marketing / promotional activities to increase customer awareness 25%
- Finding and applying to current provincial and federal government funding programs 10%
- Obtaining a better understanding of current provincial and federal government funding programs 15%

Industry Sector Hiring Constraints

- Applicants have insufficient technical skills 20%
- Applicants have insufficient work experience 25%
- Applicants have insufficient qualifications (education level/credentials) 15%
- Not enough applicants 10%
- No applicants at all 5%
## RESULTS BY INDUSTRY SECTOR

### Industry Sector: Wholesale trade

#### Employment Totals by Industry Sector Chart

<table>
<thead>
<tr>
<th>Number of Respondents</th>
<th>January 2021</th>
<th>January 2020</th>
<th>Change</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>587</td>
<td>687</td>
<td>-100</td>
<td>-14.6%</td>
</tr>
</tbody>
</table>

#### Employment Insights

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

#### Revenue Impact Comparative Analysis

- It increased: 25.8%
- No impact or change: 19.4%
- It decreased less than 25%: 19.1%
- It decreased between 25% - 49%: 10.5%
- It decreased between 50% - 74%: 16.1%
- It decreased 75% or more: 9.7%

### Industry Sector Short Term Priorities

- Expanding my business (to a larger location or adding another location)
- Forming local partnerships / buying local
- Increasing the online presence / activity of your business
- Attracting new employees
- Increasing marketing / promotional activities to increase customer awareness
- Finding and applying to current provincial and federal government funding programs
- Obtaining a better understanding of current provincial and federal government funding programs

### Industry Sector Hiring Constraints

- Applicants have insufficient technical skills
- Applicants have insufficient work experience
- Applicants have insufficient qualifications (education level/credentials)
- Applicants have insufficient work experience
- Not enough applicants
- No applicants at all