



Hamilton

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

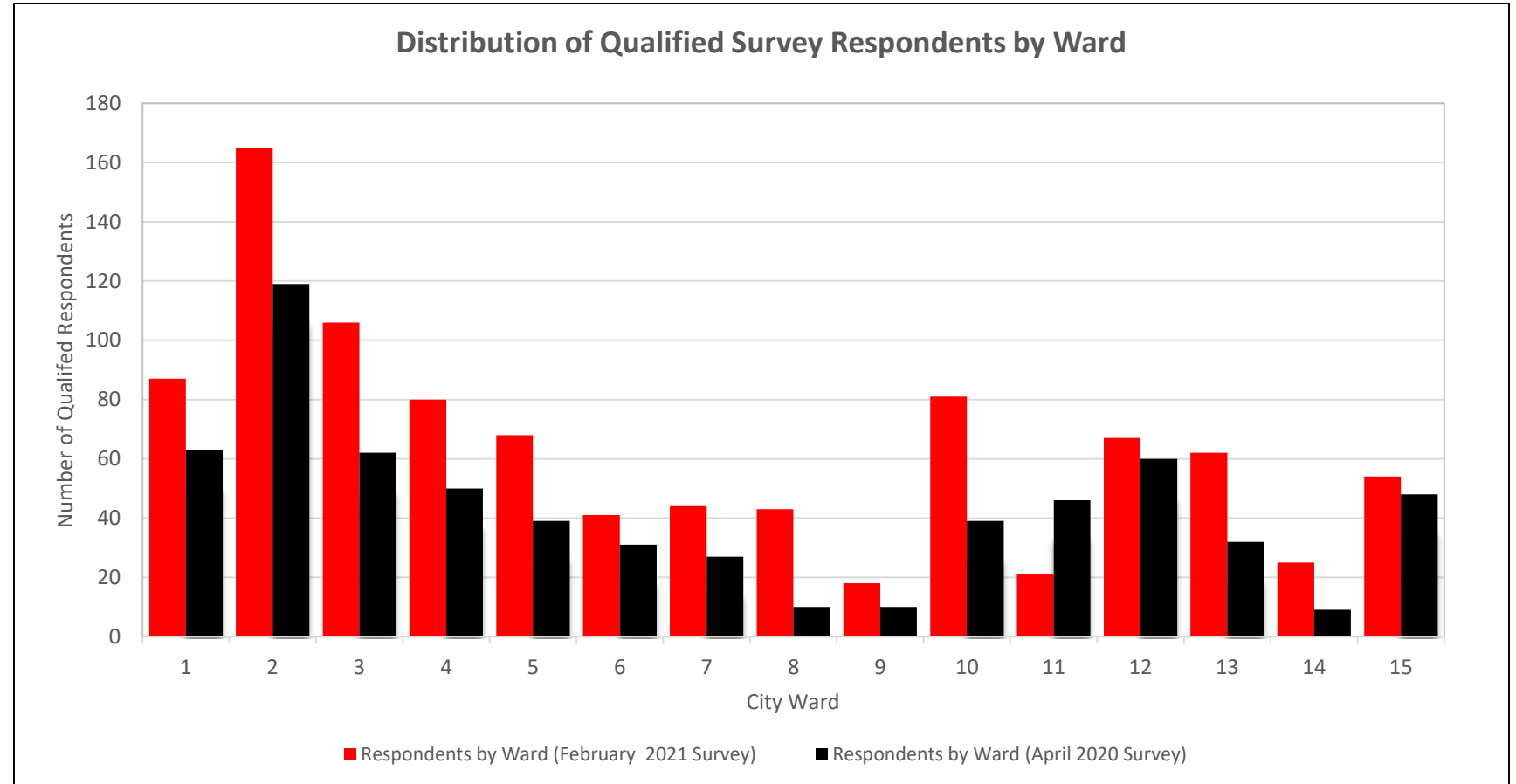
AVERAGE TIME SPENT

OUTREACH CHANNELS



Distribution of Survey Respondents by Ward

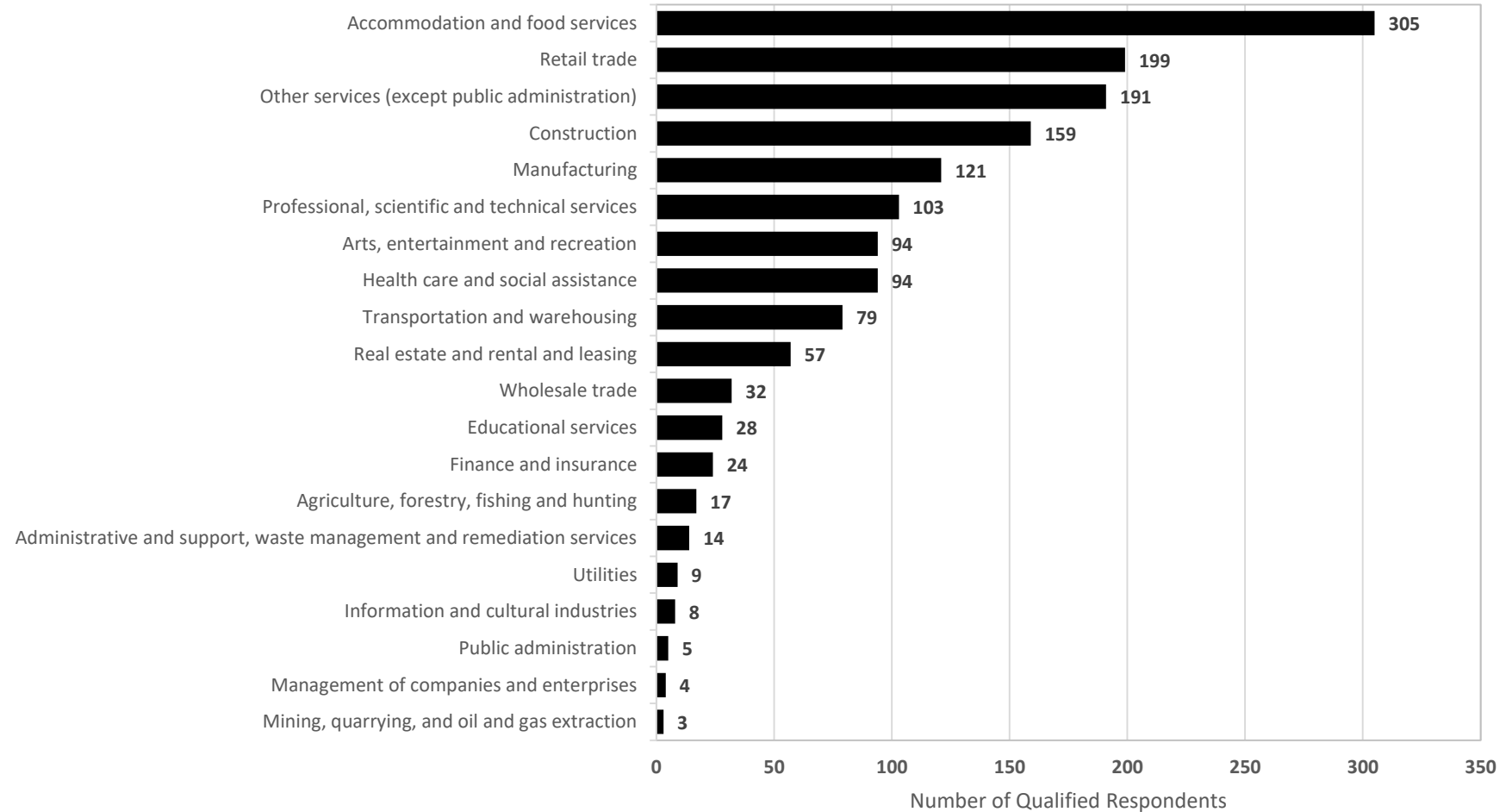
RESPONDENT DEMOGRAPHICS



Distribution of Survey Respondents by Industry Sector

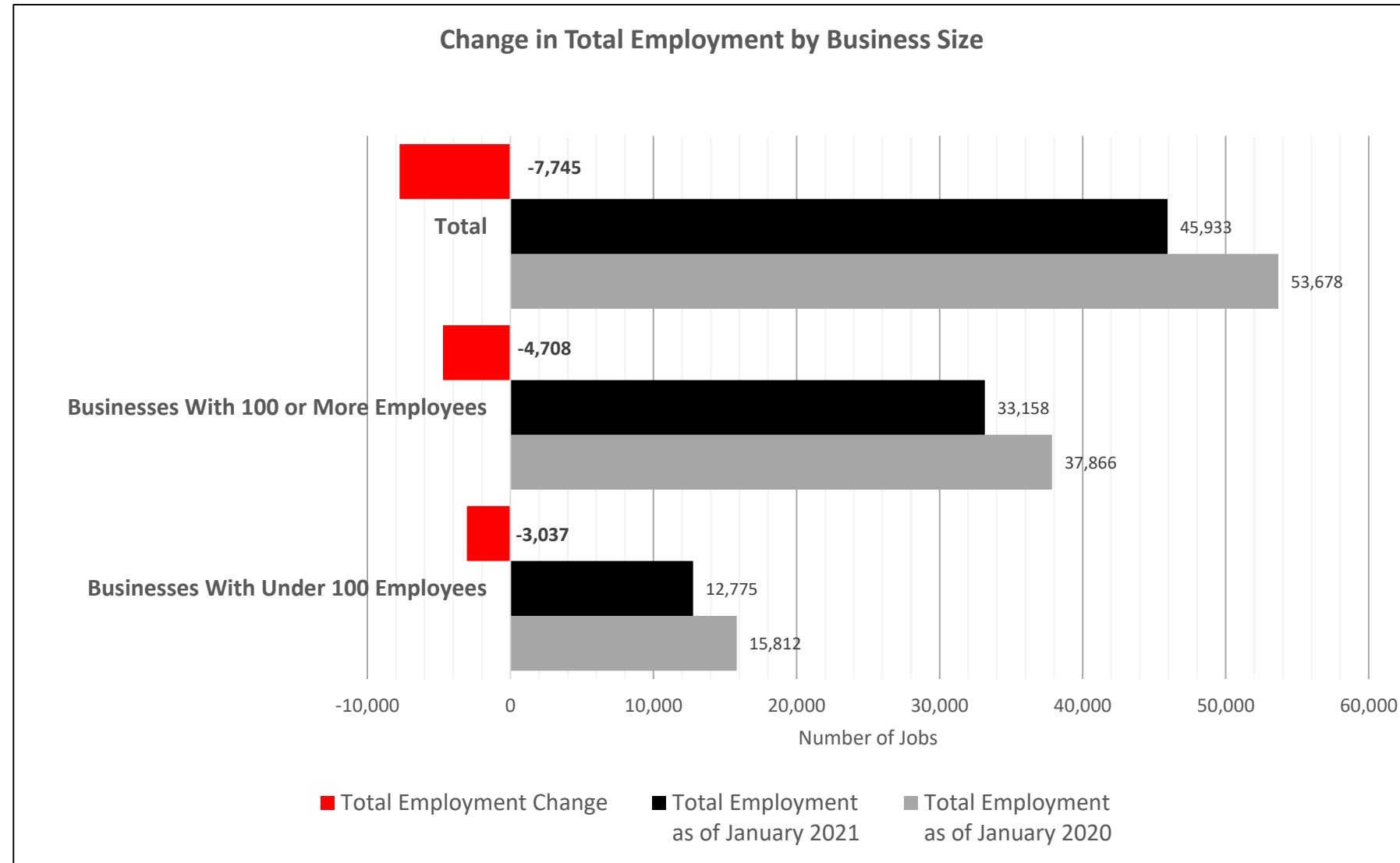
RESPONDENT DEMOGRAPHICS

Qualified Respondents by Industry Sector



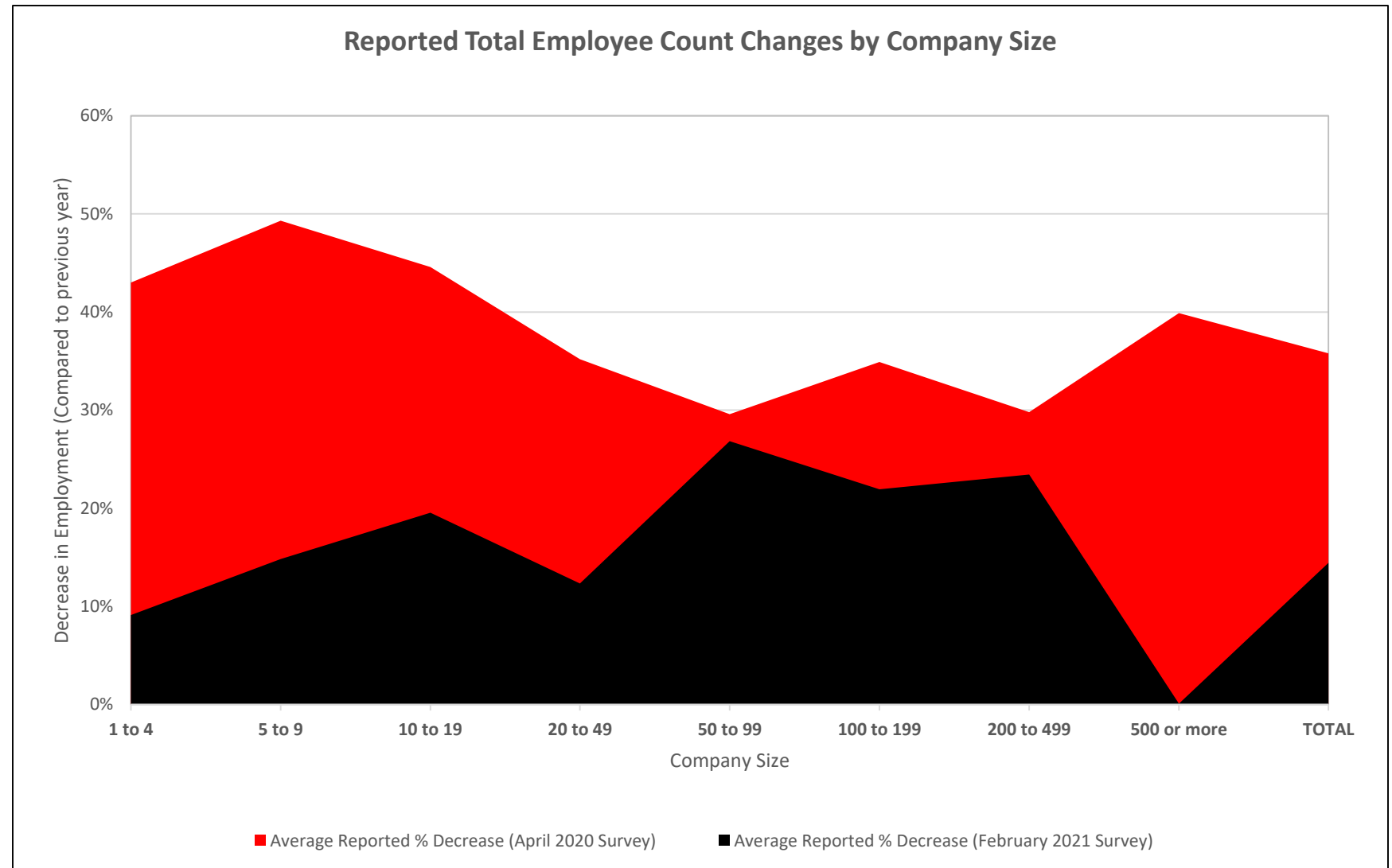
Reported Impact on Employment Totals by Business Size

IMPACT ON EMPLOYMENT



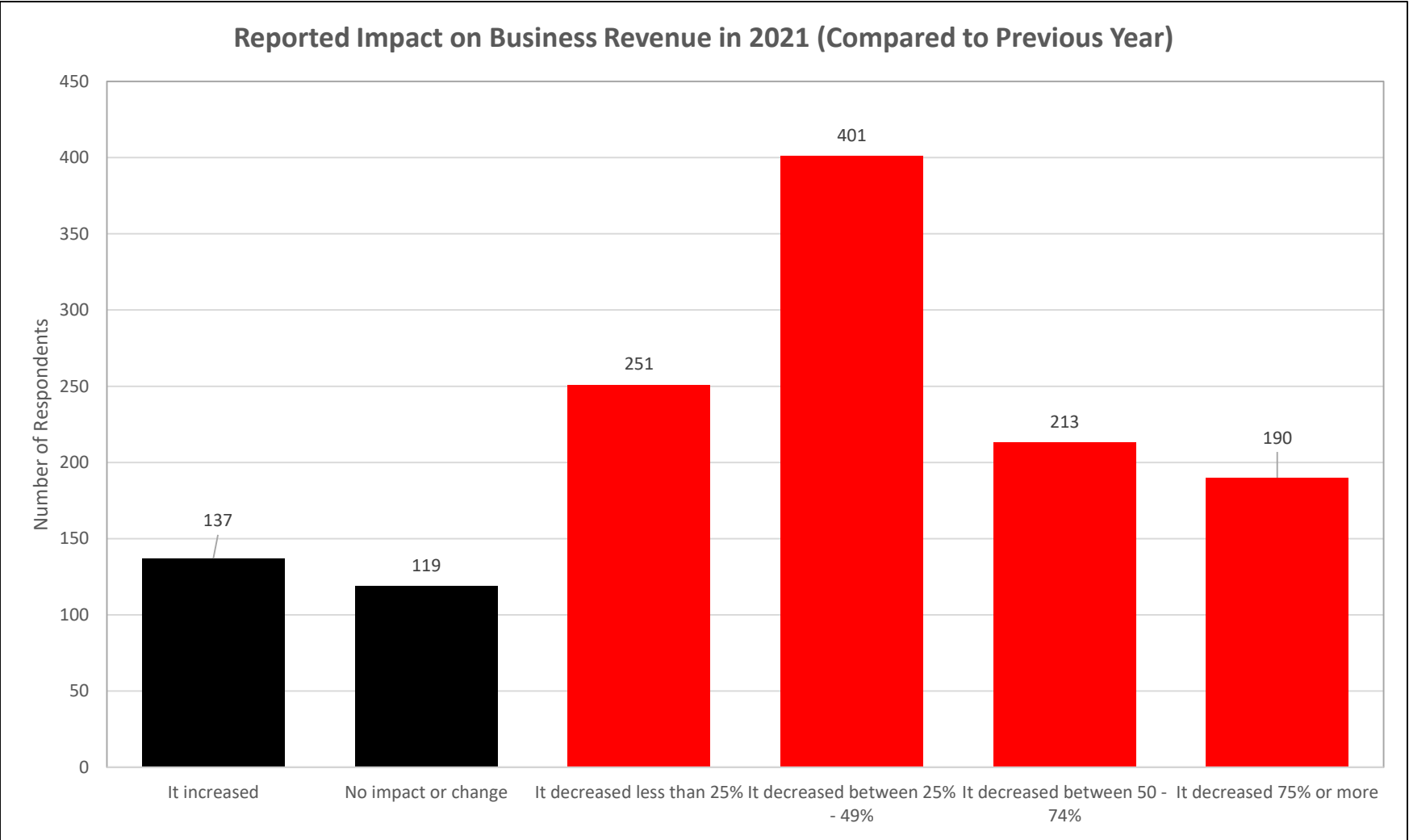
Reported Impact on Employment Totals by Business Size

IMPACT ON EMPLOYMENT



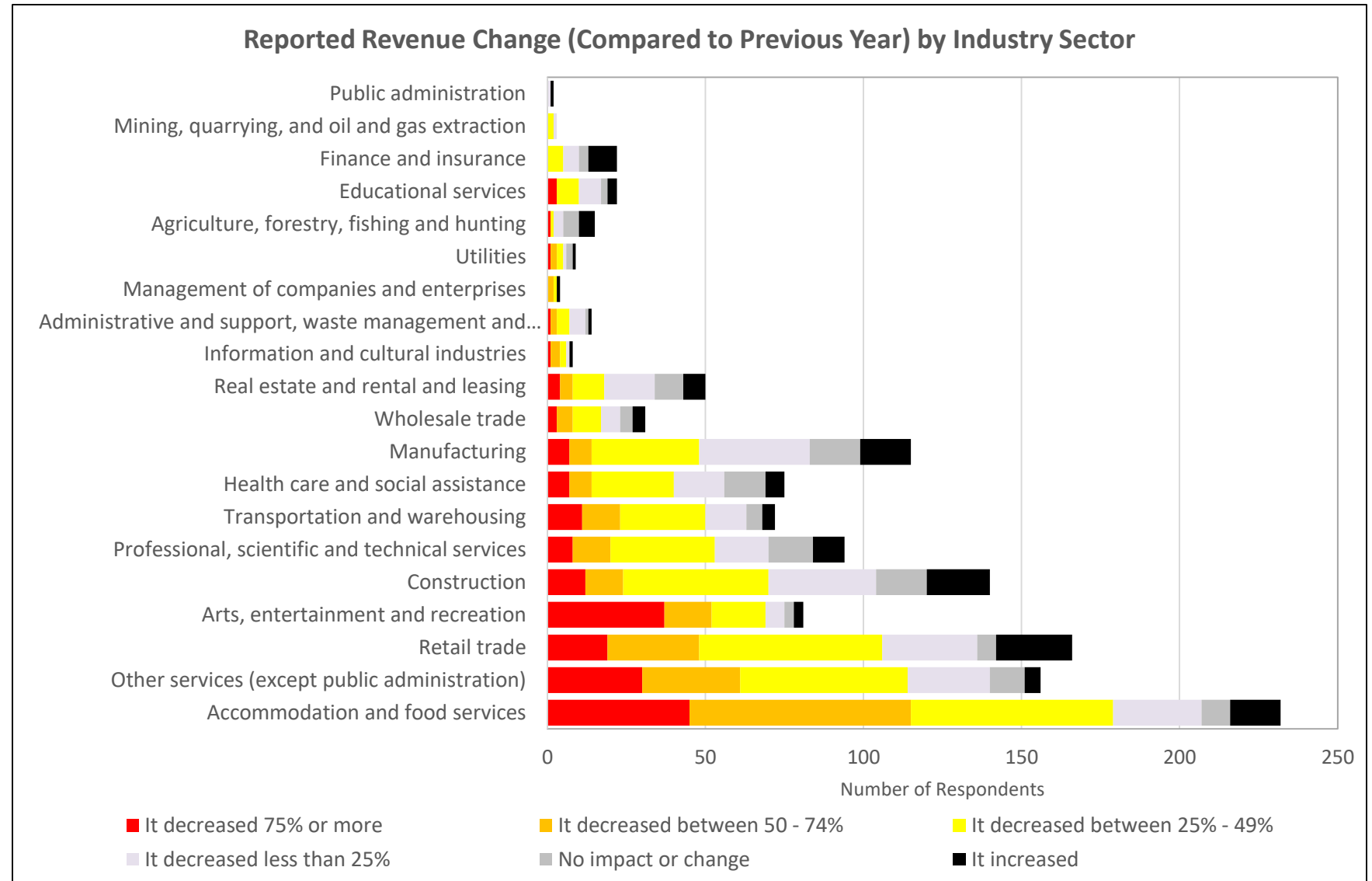
Reported Impact on Revenue (Compared to Previous Year Totals)

**IMPACT ON
REVENUE**



Reported Revenue Impact by Industry Sector

IMPACT ON REVENUE



Forecasted Impact on Future Employment Totals by Business Size

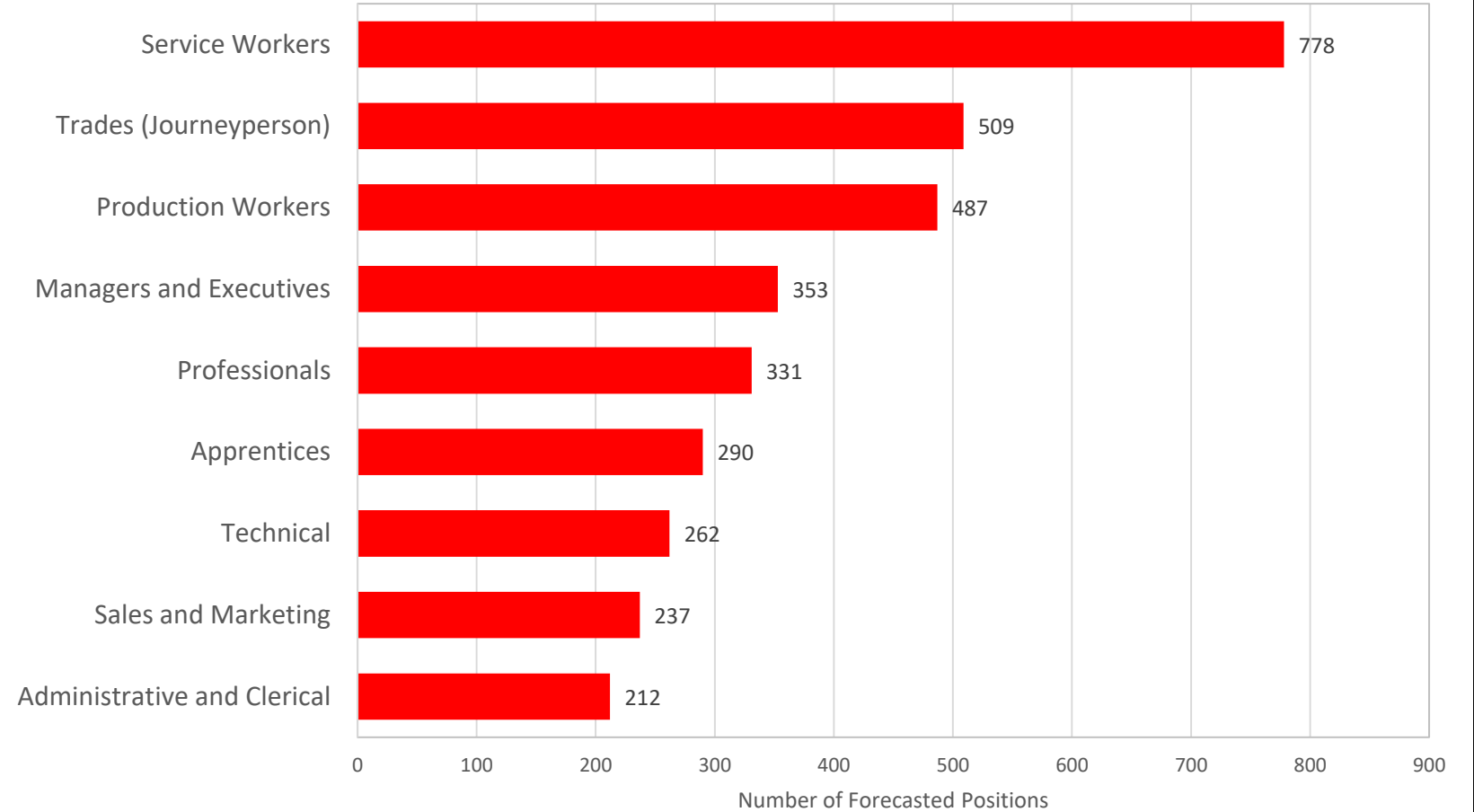
IMPACT ON EMPLOYMENT

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

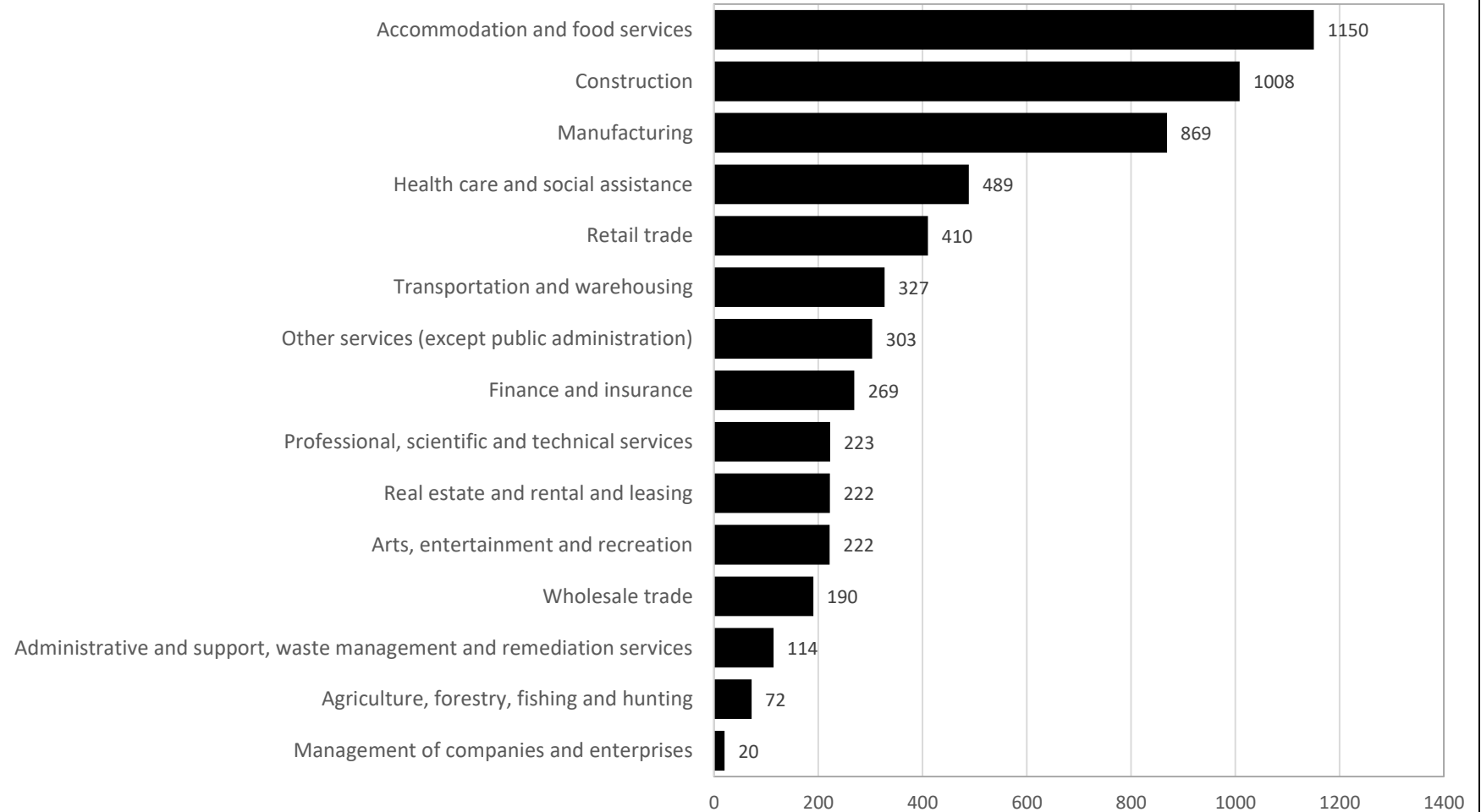
Hiring Intentions by Job Type



Workforce Insights

WORKFORCE INSIGHTS

Number of Reported CEWS Supported Employees by Industry Sector



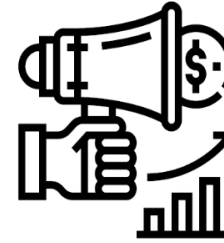
Respondent Business Priorities – Next Six Months

CALL TO ACTION



586

Increasing the online
presence of their business



575

Increasing marketing /
promotional activities



473

Finding and applying to
government funding
programs



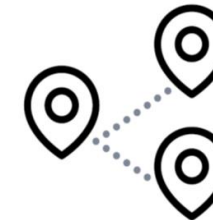
396

Attracting new employees



308


Forming local partnerships
and buying local



227

Business expansion

Intended Future Engagement of Respondents



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 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

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%
TOTAL	1546	45,929	54,341	53,859	-8,412	-15.50%	7,930	-482	-0.90%

APPENDICIES

Select Industry Sector Information

For all Industry Sectors with 15+ Respondents

Key Considerations



KEY CONSIDERATIONS

- The information collected in the Business Impact & Workforce Needs survey provides insights based on specific points in time. This is especially relevant for all information related to reported total revenues and employment, which the survey specifically requested insights as of January 2020 and January 2021 to allow for a year-over-year comparison.
- Given the dynamic nature of the business conditions in which respondents were operating over the past year, the point in time information provided does not completely and totally reflect the impact on the responding businesses, and should not be interpreted in such a way.
- The following Industry Sector overviews provide visibility into the aggregate information provided by all responding businesses by their self-identified Industry Sector, and while some Industry Sectors had a large number of participants, the results should not be interpreted as being fully representative of the Industry Sector. Specific caution should be applied by all users of the following data when reviewing sectors with less than 100 total respondents.

INDUSTRY SECTOR OVERVIEW

Industry Sector: Accommodation and food services

Employment Totals by Industry Sector Chart

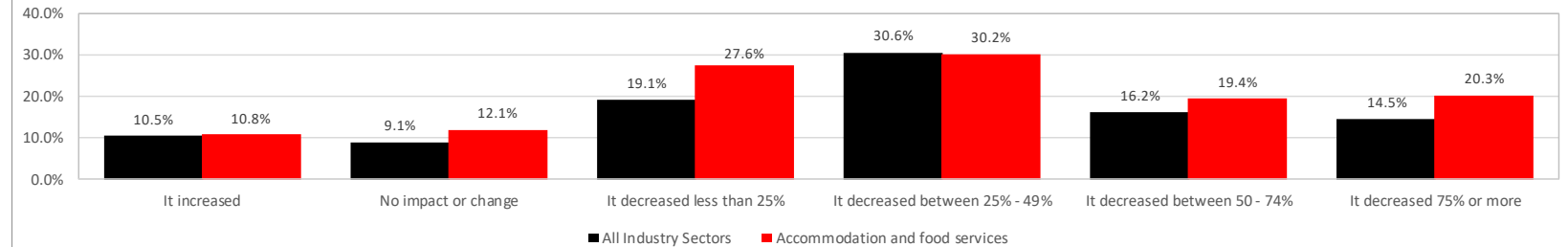
Number of Respondents	January 2021	January 2020	Change	Change %
305	2,812	6,804	-3,992	-58.7%

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

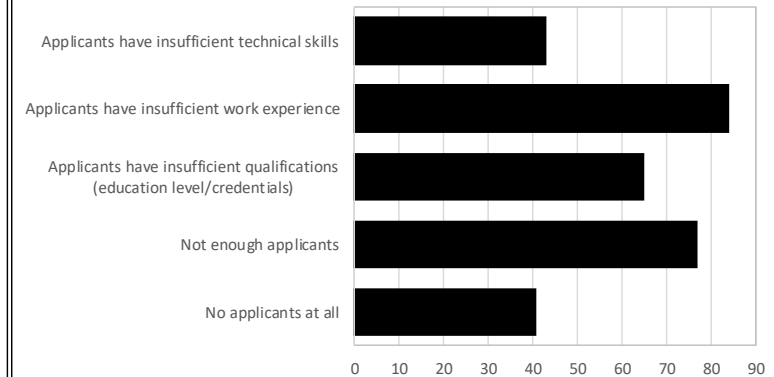
Revenue Impact Comparative Analysis



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

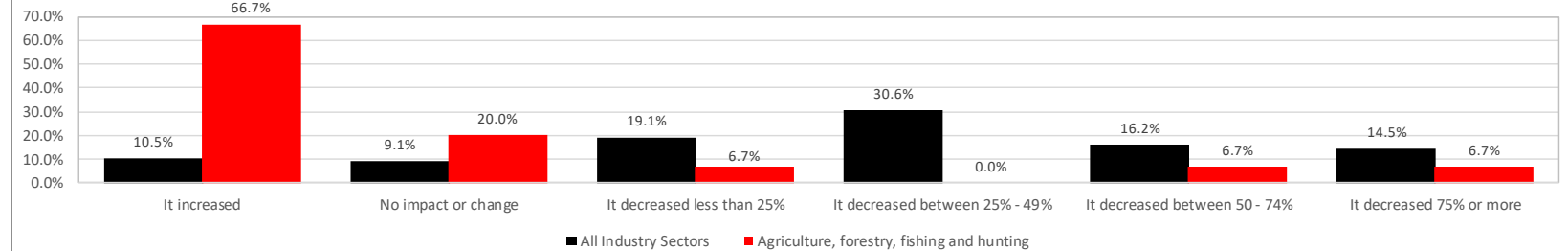
Number of Respondents	January 2021	January 2020	Change	Change %
17	368	320	48	15.0%

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

RESULTS BY INDUSTRY SECTOR

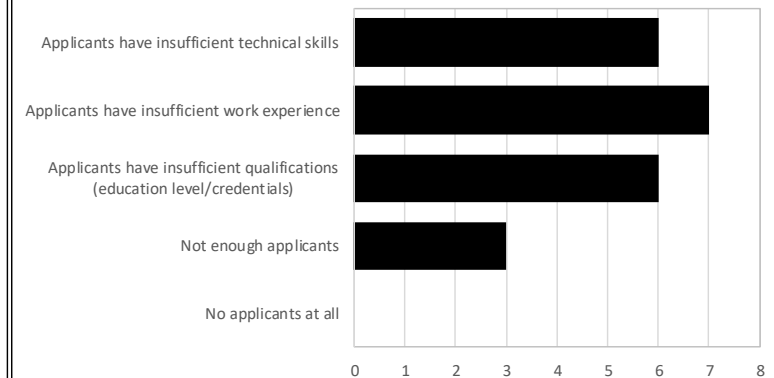
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



INDUSTRY SECTOR OVERVIEW

Industry Sector: Arts, entertainment and recreation

Employment Totals by Industry Sector Chart

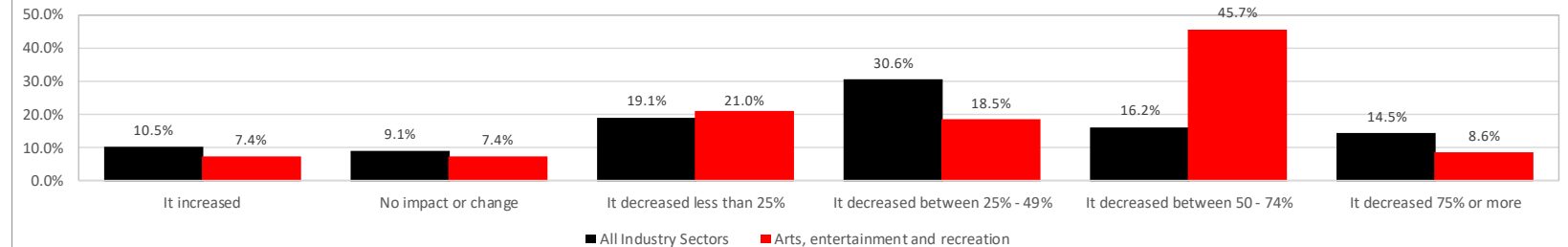
Number of Respondents	January 2021	January 2020	Change	Change %
94	1,214	2,328	-1,114	-47.9%

Employment Insights

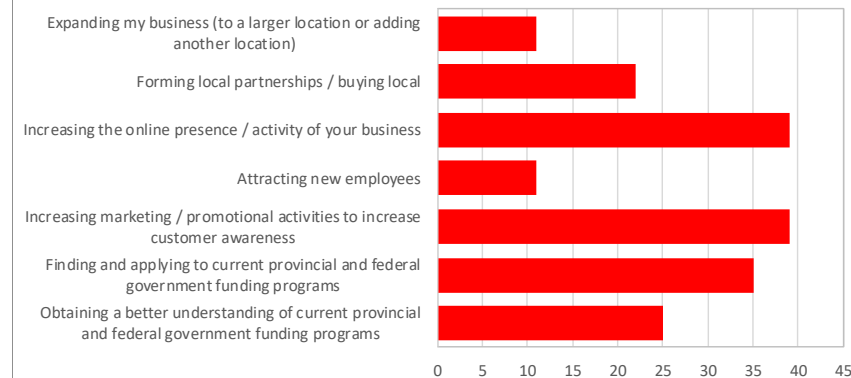
38	Number of responding companies hiring in next six months
44.2%	Percentage of responding Companies Hiring in the next six months
1110	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
222	Number of Employees Supported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

RESULTS BY INDUSTRY SECTOR

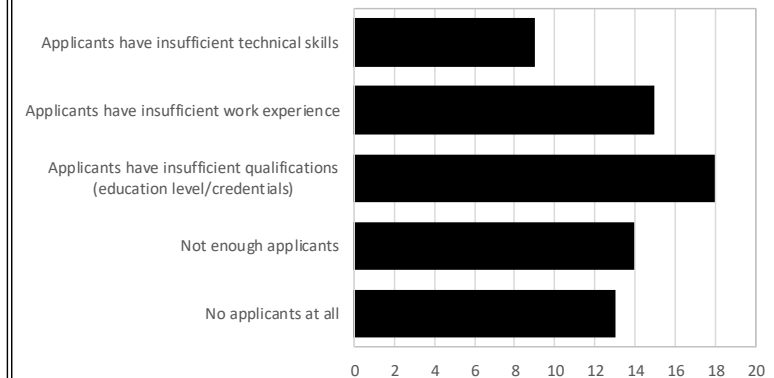
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



INDUSTRY SECTOR OVERVIEW

Industry Sector: Construction

Employment Totals by Industry Sector Chart

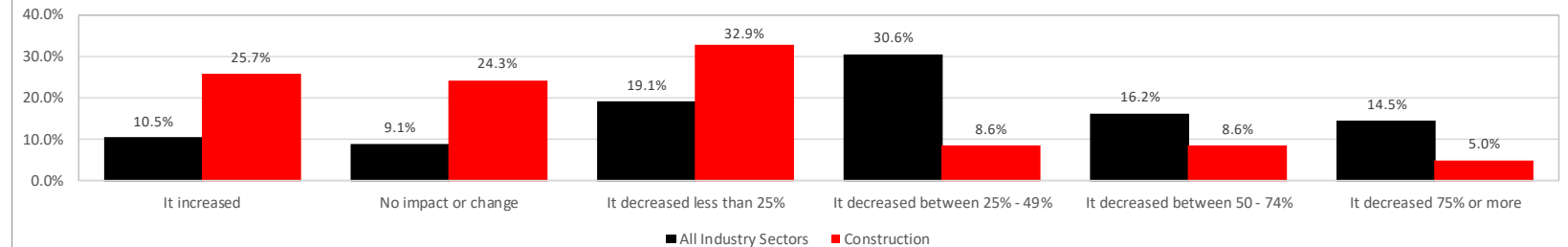
Number of Respondents	January 2021	January 2020	Change	Change %
159	3,506	3,812	-306	-8.0%

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

RESULTS BY INDUSTRY SECTOR

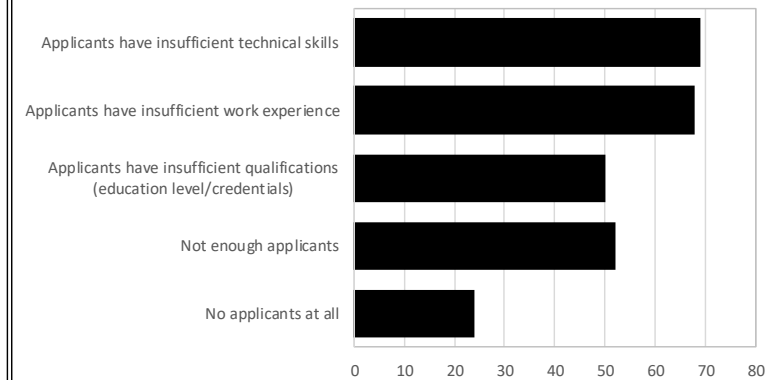
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



INDUSTRY SECTOR OVERVIEW

Industry Sector: Educational services

Employment Totals by Industry Sector Chart

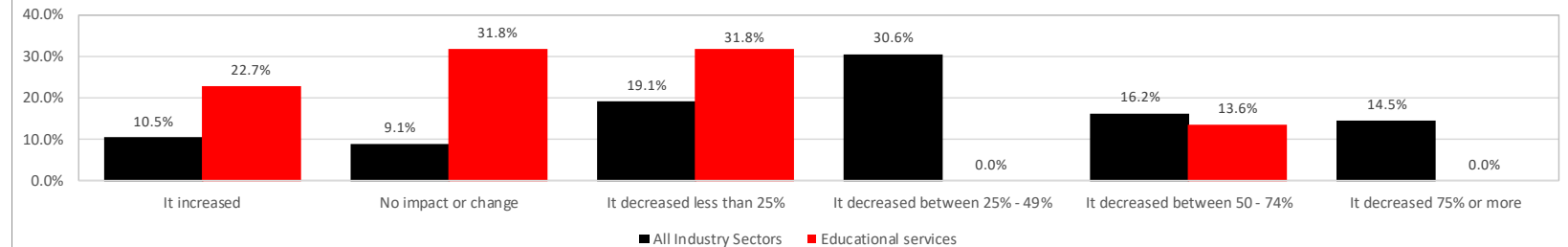
Number of Respondents	January 2021	January 2020	Change	Change %
28	4,352	4,520	-168	-3.7%

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

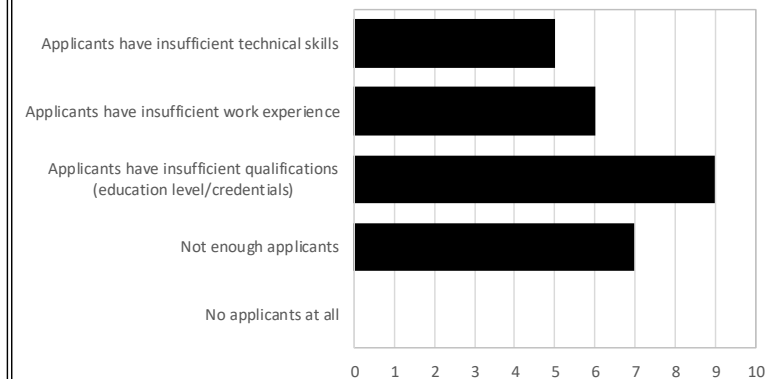
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



INDUSTRY SECTOR OVERVIEW

Industry Sector: Finance and insurance

Employment Totals by Industry Sector Chart

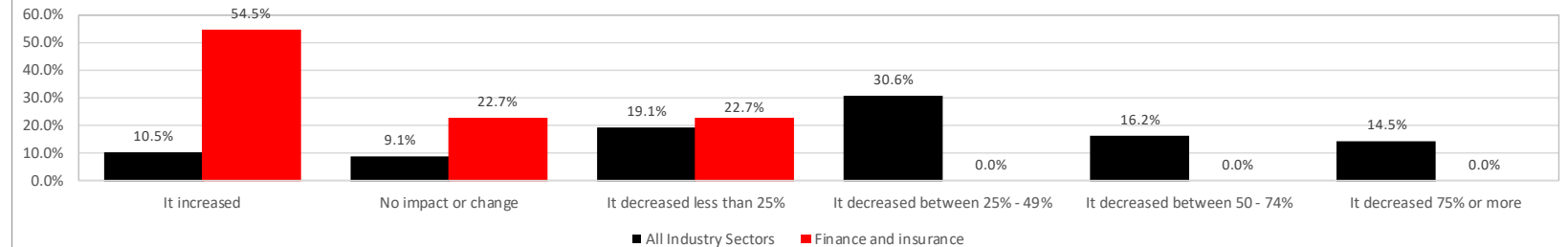
Number of Respondents	January 2021	January 2020	Change	Change %
24	858	835	23	2.8%

Employment Insights

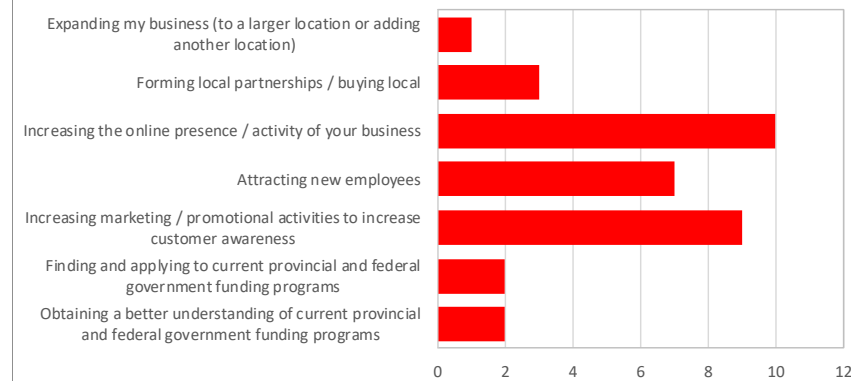
13	Number of responding companies hiring in next six months
59.1%	Percentage of responding Companies Hiring in the next six months
40	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
269	Number of Employees Supported by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

RESULTS BY INDUSTRY SECTOR

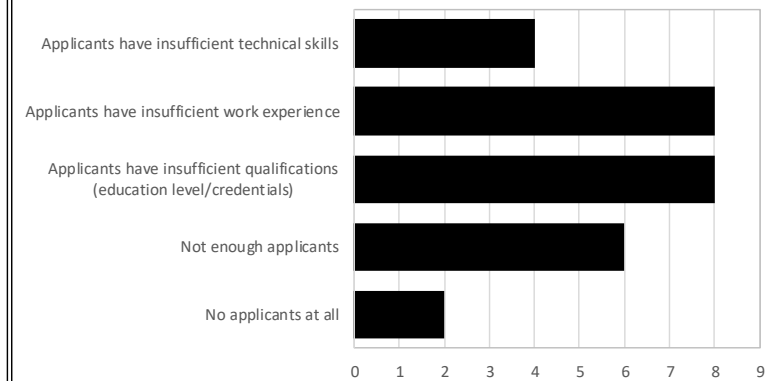
Revenue Impact Comparative Analysis



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

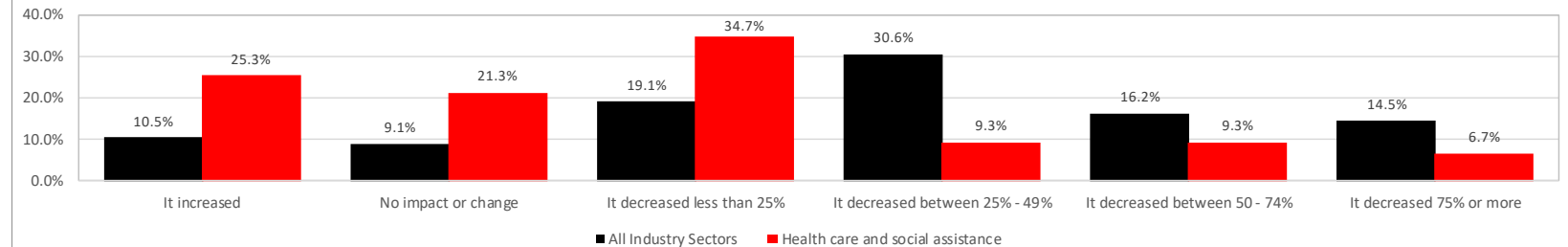
Number of Respondents	January 2021	January 2020	Change	Change %
94	4,212	4,425	-213	-4.8%

Employment Insights

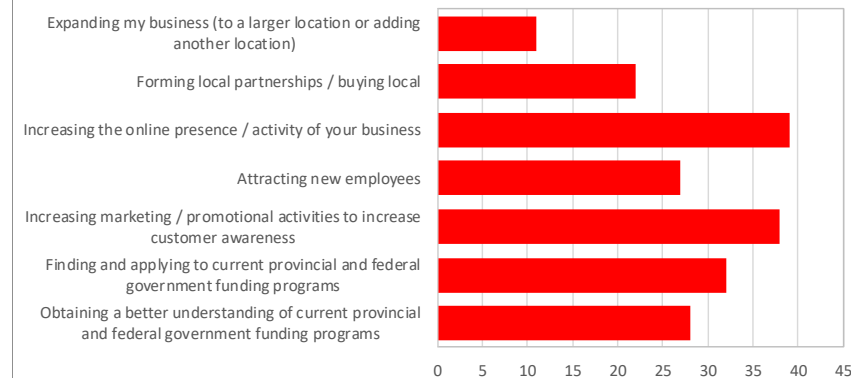
49	Number of responding companies hiring in next six months
53.3%	Percentage of responding Companies Hiring in the next six months
-236	Forecasted total change in employment for responding companies (when restrictions are permanently lifted compared to January 2020)
489	Number of Employees Supported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

RESULTS BY INDUSTRY SECTOR

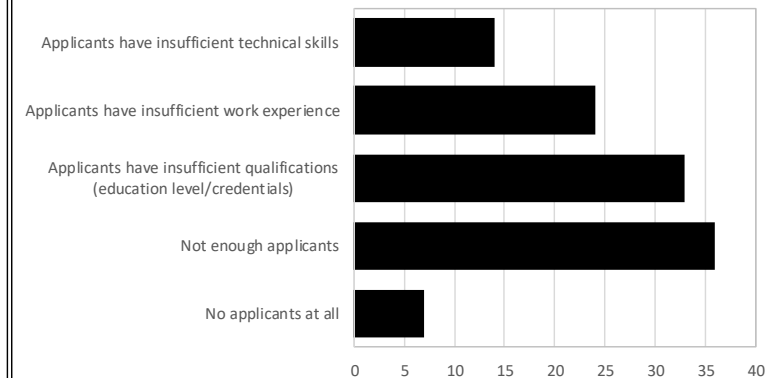
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



INDUSTRY SECTOR OVERVIEW

Industry Sector: Manufacturing

Employment Totals by Industry Sector Chart

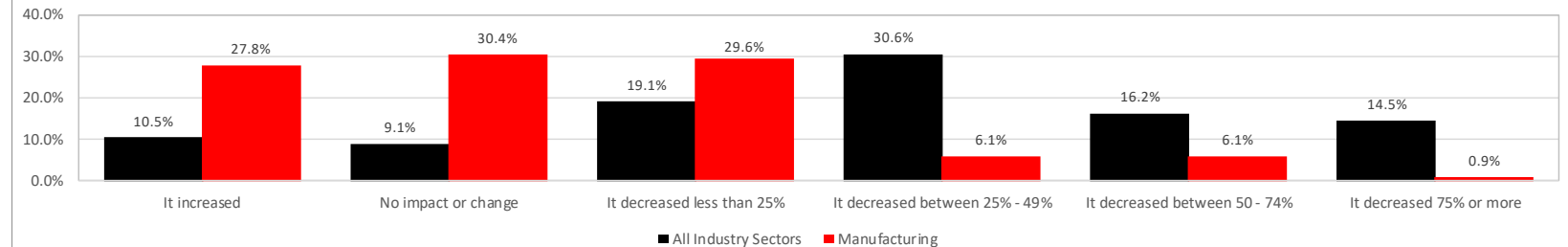
Number of Respondents	January 2021	January 2020	Change	Change %
121	14,969	15,789	-820	-5.2%

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

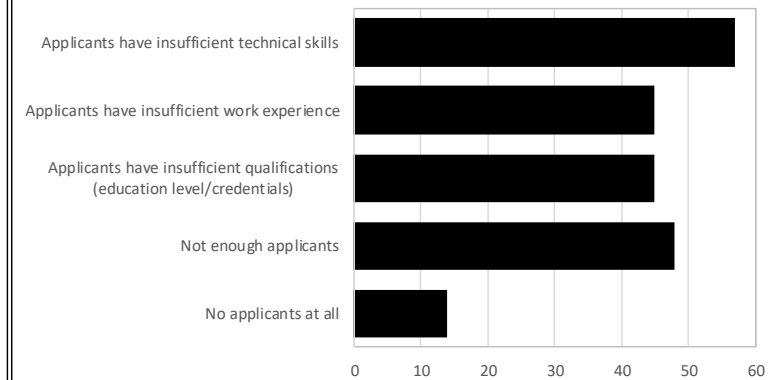
Revenue Impact Comparative Analysis



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

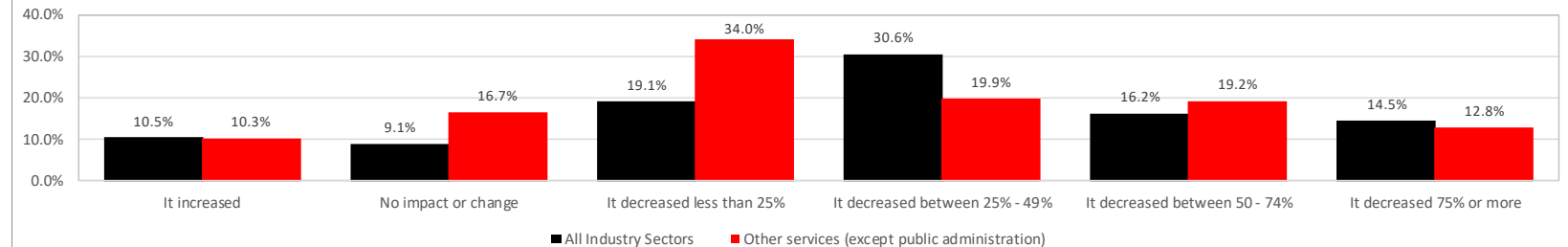
Number of Respondents	January 2021	January 2020	Change	Change %
191	5,581	5,920	-339	-5.7%

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

RESULTS BY INDUSTRY SECTOR

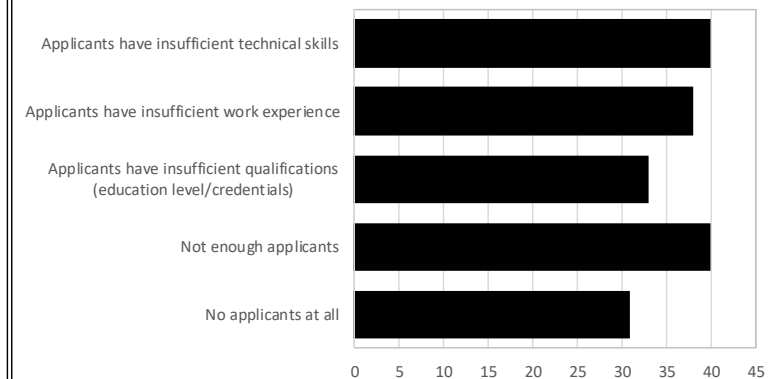
Revenue Impact Comparative Analysis



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

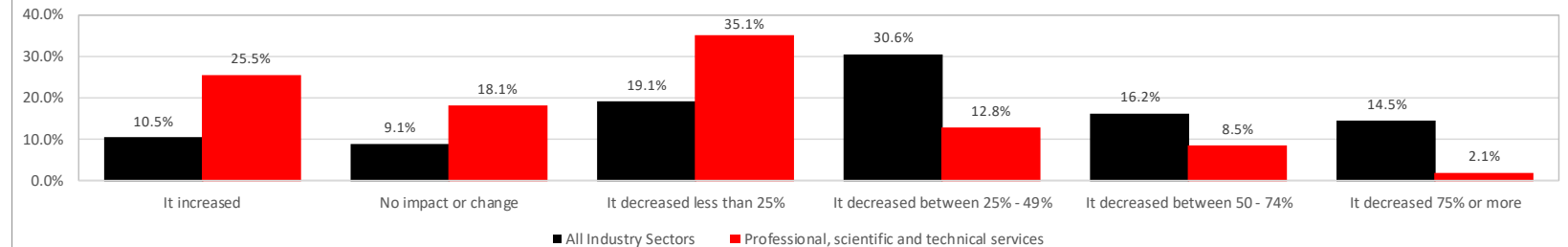
Number of Respondents	January 2021	January 2020	Change	Change %
103	1,437	1,575	-138	-8.8%

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

RESULTS BY INDUSTRY SECTOR

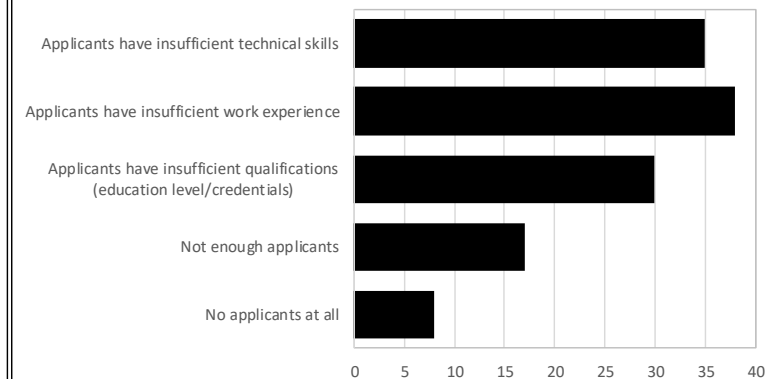
Revenue Impact Comparative Analysis



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

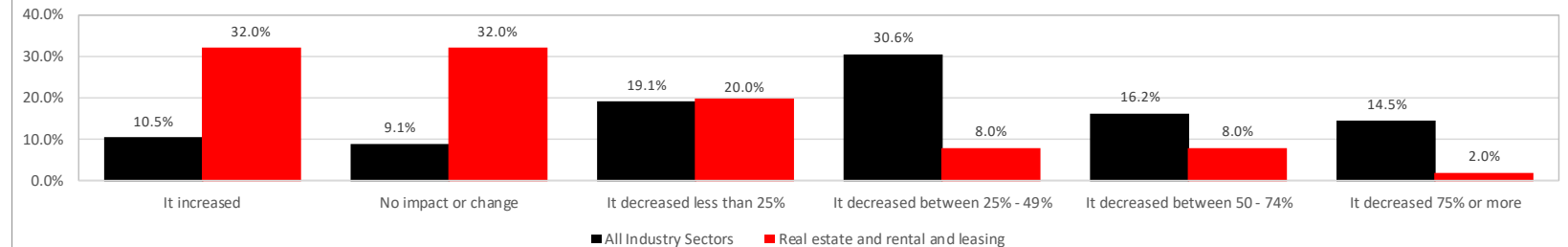
Number of Respondents	January 2021	January 2020	Change	Change %
57	858	889	-31	-3.5%

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

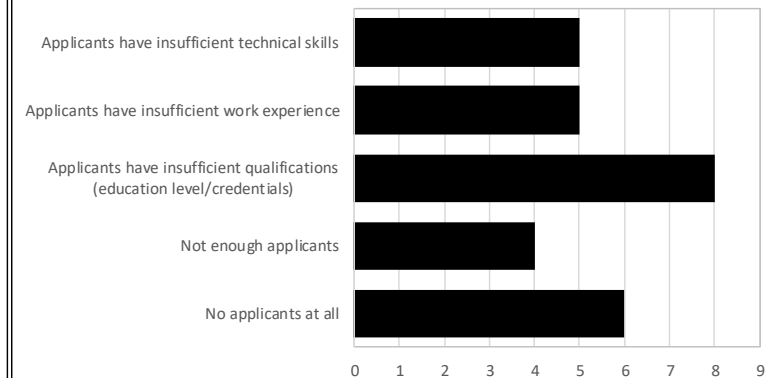
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



INDUSTRY SECTOR OVERVIEW

Industry Sector: Retail trade

Employment Totals by Industry Sector Chart

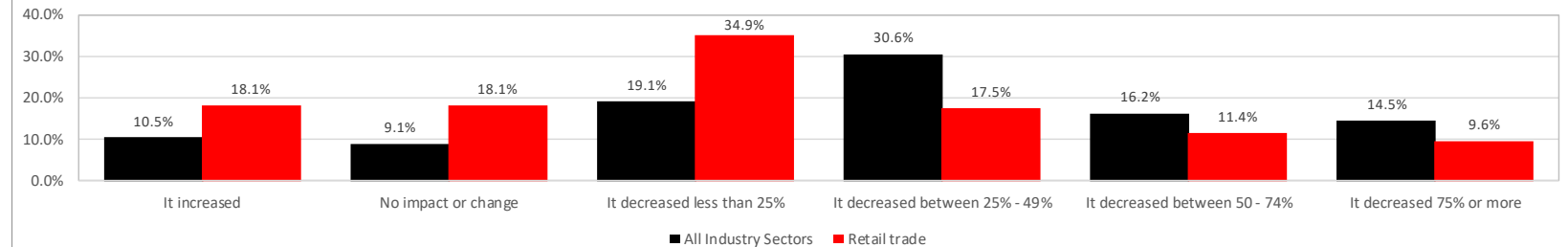
Number of Respondents	January 2021	January 2020	Change	Change %
199	2,484	2,775	-291	-10.5%

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

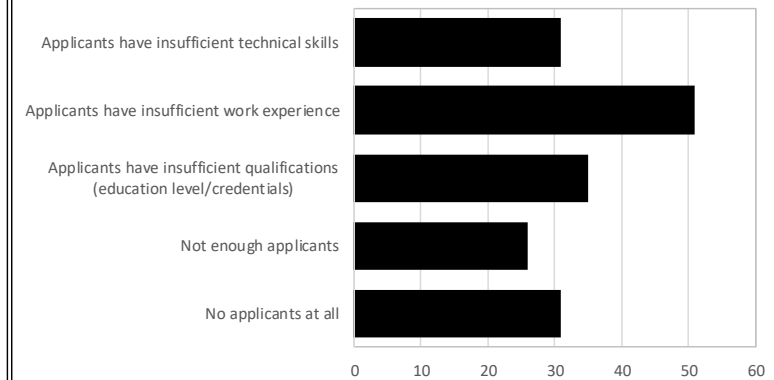
Revenue Impact Comparative Analysis



Industry Sector Short Term Priorities



Industry Sector Hiring Constraints



INDUSTRY SECTOR OVERVIEW

Industry Sector: Transportation and warehousing

Employment Totals by Industry Sector Chart

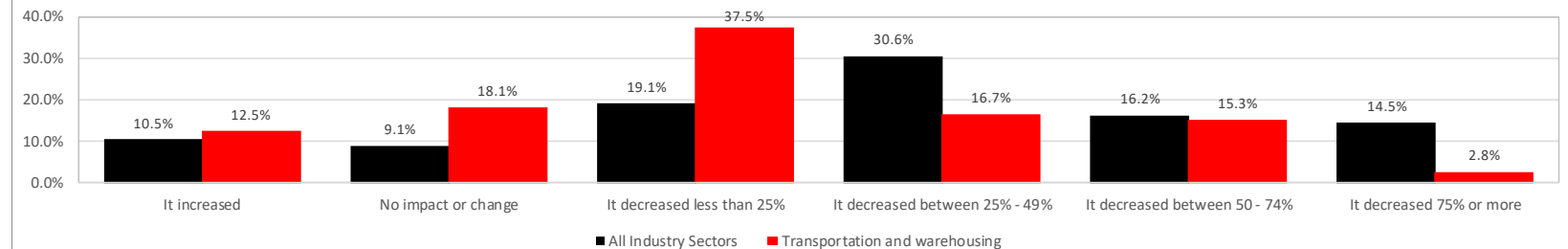
Number of Respondents	January 2021	January 2020	Change	Change %
79	1,853	2,624	-771	-29.4%

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

RESULTS BY INDUSTRY SECTOR

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

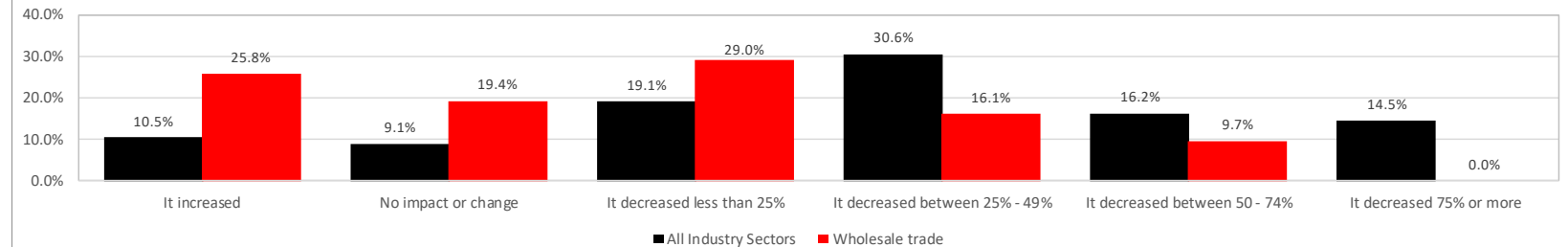
Number of Respondents	January 2021	January 2020	Change	Change %
32	587	687	-100	-14.6%

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

