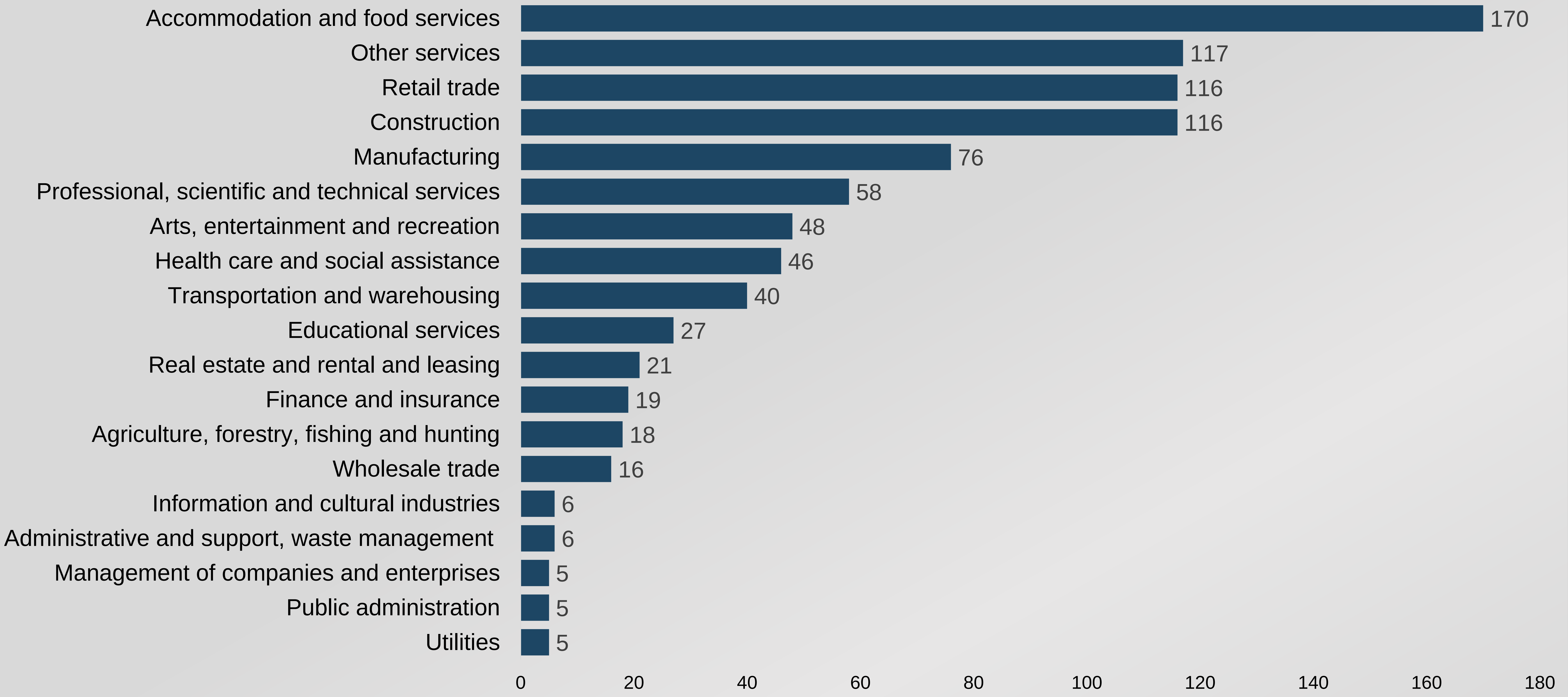
INVEST IN HAMILTON

2022 Business and Workforce Needs Survey

Appendix “A” to Report PED22080 - Summary Tables and Charts

Sectoral Representation

Figure 1: Survey Respondents by Industry Sector, 2-digit NAICS, n=915



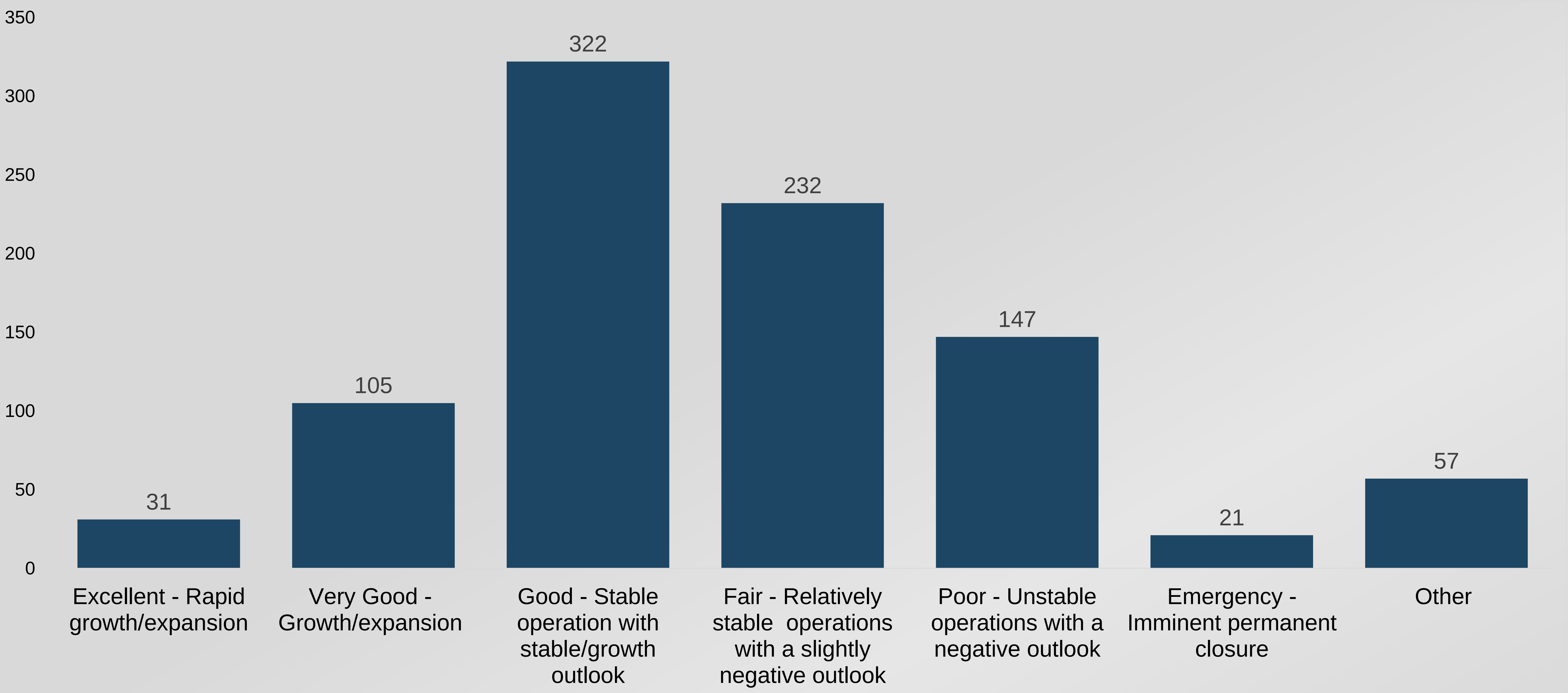
Employee Counts

Table 1: Survey Respondents by Industry Sector, 2-digit NAICS, n=915

Row Labels	Jan 2020 Employee Count	Jan 2022 Employee Count	Absolute Change	% Change
Manufacturing	13,049	12,252	-797	-6.1%
Educational services	9,167	9,135	-32	-0.3%
Other services (except public administration)	5,033	5,962	929	18.5%
Professional, scientific and technical services	3,566	3,621	55	1.5%
Health care and social assistance	2,899	3,125	226	7.8%
Construction	2,757	2,719	-38	-1.4%
Accommodation and food services	4,455	2,674	-1,781	-40.0%
Retail trade	2,213	2,068	-145	-6.6%
Transportation and warehousing	2,283	1,713	-570	-25.0%
Arts, entertainment and recreation	1,188	927	-262	-22.0%
Agriculture, forestry, fishing and hunting	579	599	20	3.5%
Finance and insurance	422	439	17	4.0%
Utilities	418	386	-32	-7.7%
Wholesale trade	346	274	-72	-20.8%
Real estate and rental and leasing	231	246	15	6.5%
Public administration	215	225	10	4.7%
Management of companies and enterprises	227	213	-14	-6.2%
Administrative and support, waste management and remediation services	161	183	22	13.7%
Information and cultural industries	29	37	8	27.6%

Business Outlook

Figure 2: Self-Identified Business Outlook over the next 6 months, n=915



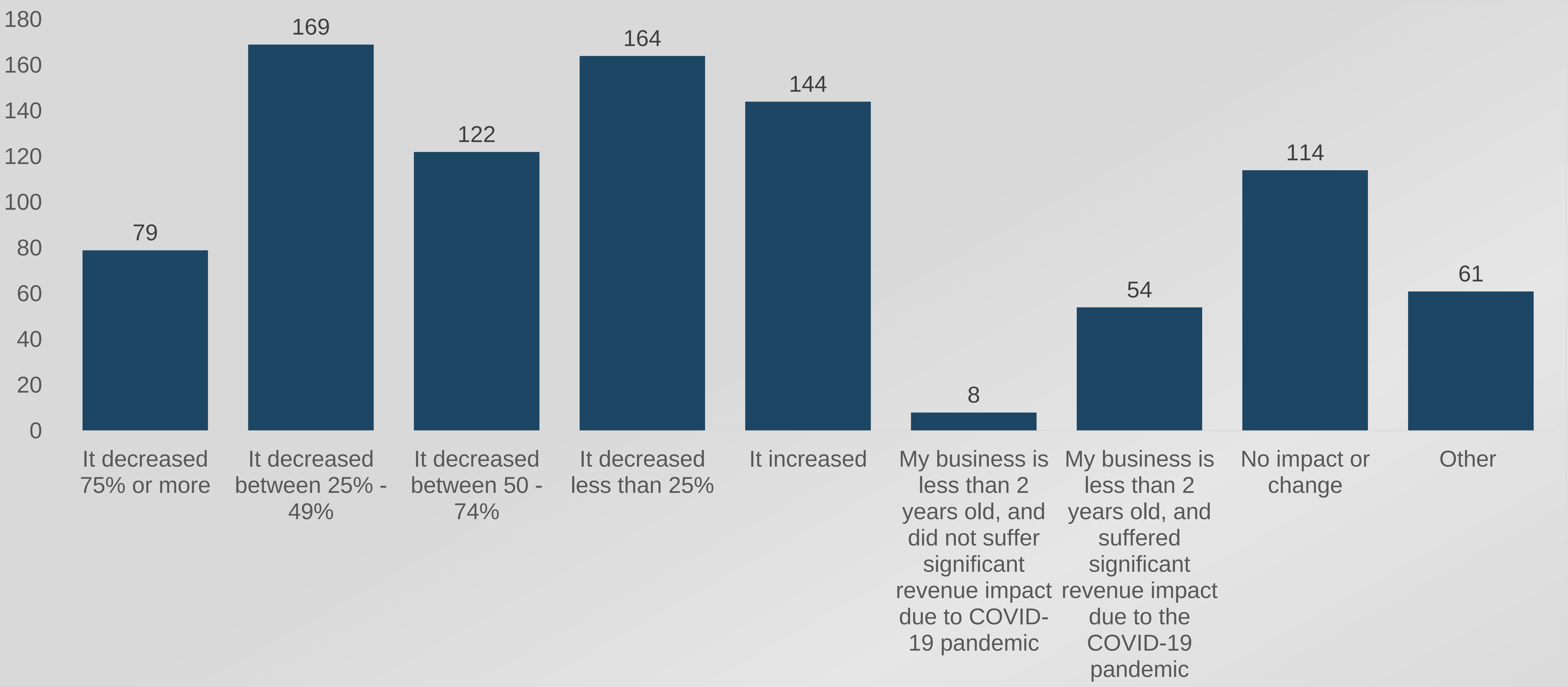
Business Outlook

Table 1a: Ward-based business outlook for the next 6 months n=158

Ward	Excellent - Rapid growth / expansion of business	Very Good - Growth / expansion of business	Good - Stable business operation with stable/growth outlook	Fair - Relatively stable business operations with a slightly negative outlook	Poor - Unstable business operations with a negative outlook	Emergency - Imminent permanent closure	Other - Please provide a description	Total
1	0.0%	21.4%	35.7%	28.6%	14.3%	0.0%	0.0%	14
2	0.0%	28.6%	64.3%	78.6%	50.0%	14.3%	21.4%	36
3	0.0%	7.1%	92.9%	35.7%	57.1%	0.0%	7.1%	28
4	7.1%	0.0%	14.3%	14.3%	28.6%	0.0%	7.1%	10
5	7.1%	7.1%	14.3%	35.7%	7.1%	7.1%	0.0%	11
6	0.0%	7.1%	7.1%	7.1%	0.0%	7.1%	14.3%	6
7	0.0%	0.0%	0.0%	7.1%	0.0%	0.0%	7.1%	2
8	0.0%	0.0%	42.9%	21.4%	14.3%	0.0%	0.0%	11
9	0.0%	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1
10	0.0%	0.0%	35.7%	0.0%	7.1%	0.0%	7.1%	7
11	0.0%	14.3%	7.1%	0.0%	0.0%	0.0%	0.0%	3
12	0.0%	21.4%	14.3%	0.0%	0.0%	0.0%	7.1%	6
13	7.1%	28.6%	57.1%	14.3%	7.1%	0.0%	0.0%	16
14	0.0%	0.0%	7.1%	0.0%	0.0%	0.0%	0.0%	1
15	0.0%	7.1%	14.3%	14.3%	7.1%	0.0%	0.0%	6

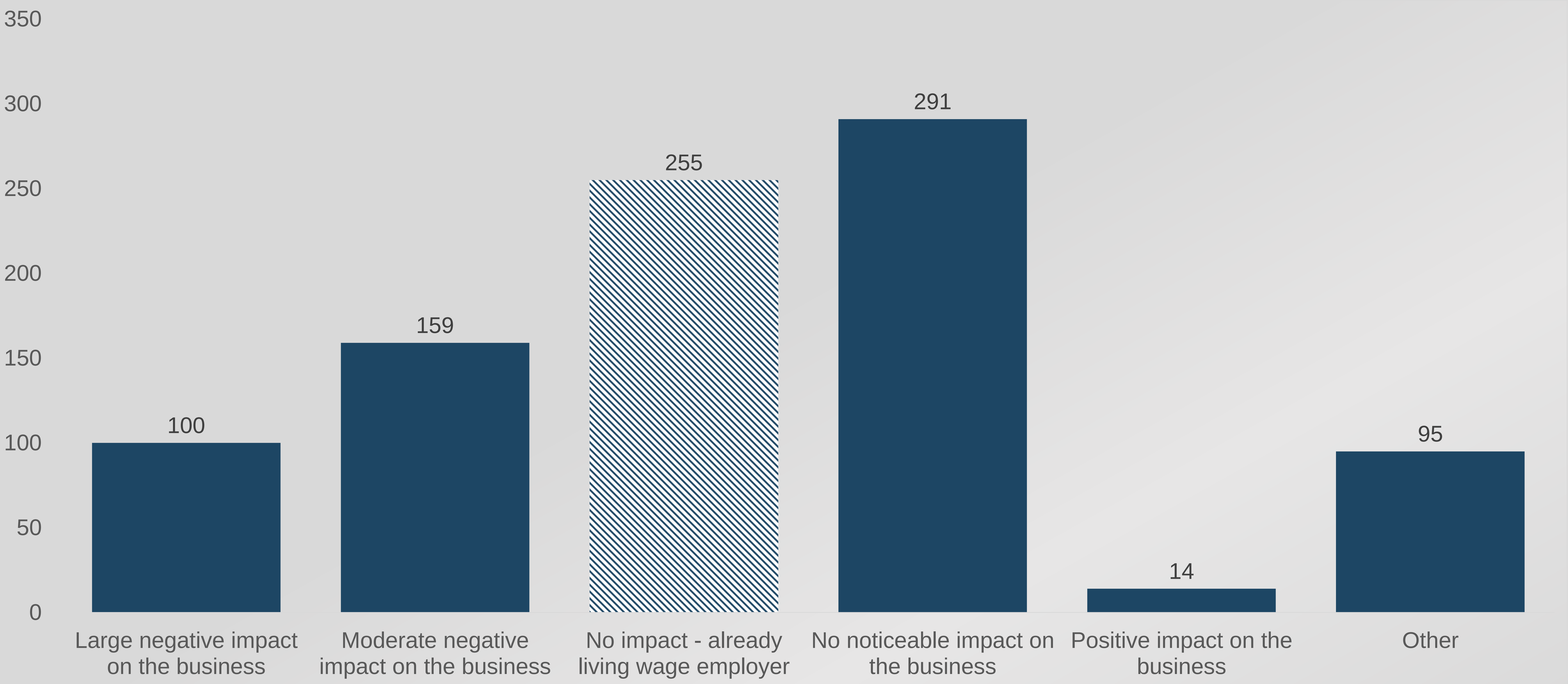
2019 vs 2021 Revenue Changes

Figure 3: Impacts of COVID-19 on business revenue in 2021 vs 2019, n=915



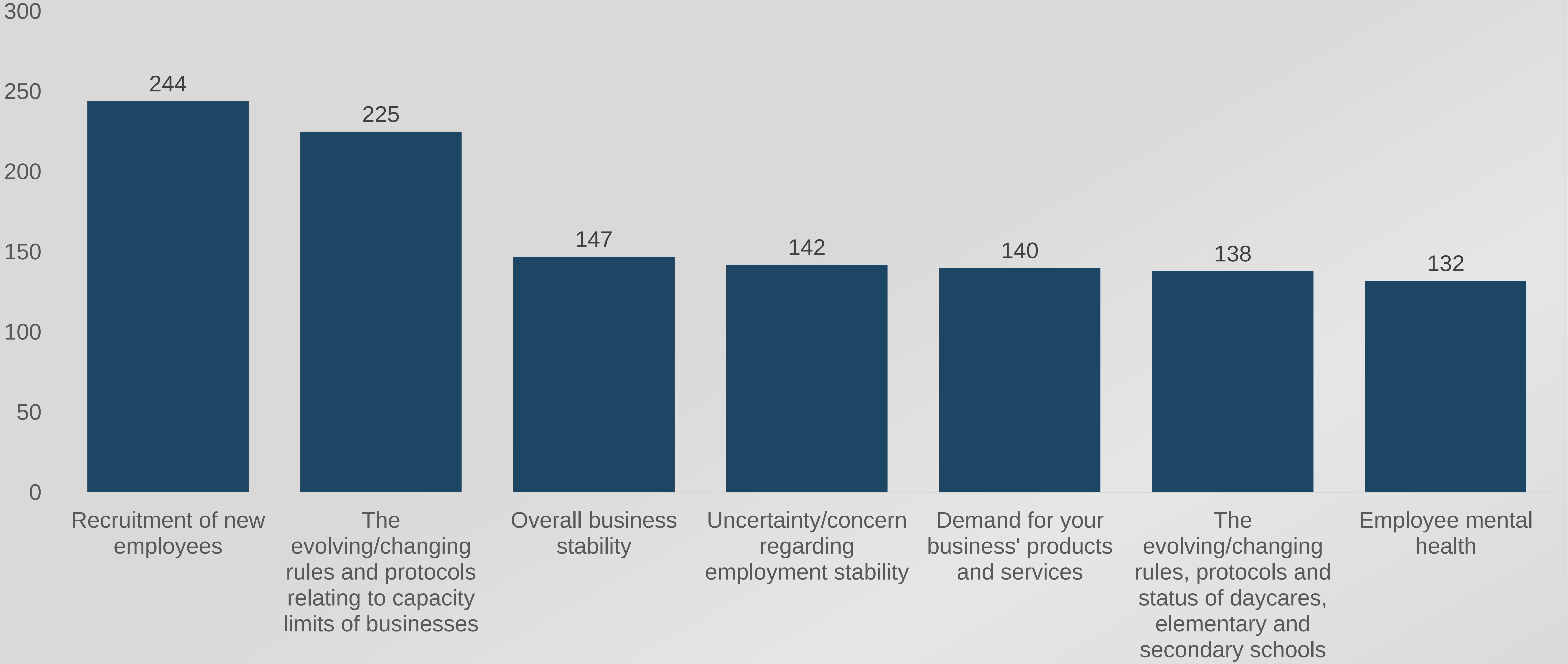
Minimum Wage Impacts

Figure 4: Impacts of the 2021 minimum wage change on businesses, n=914



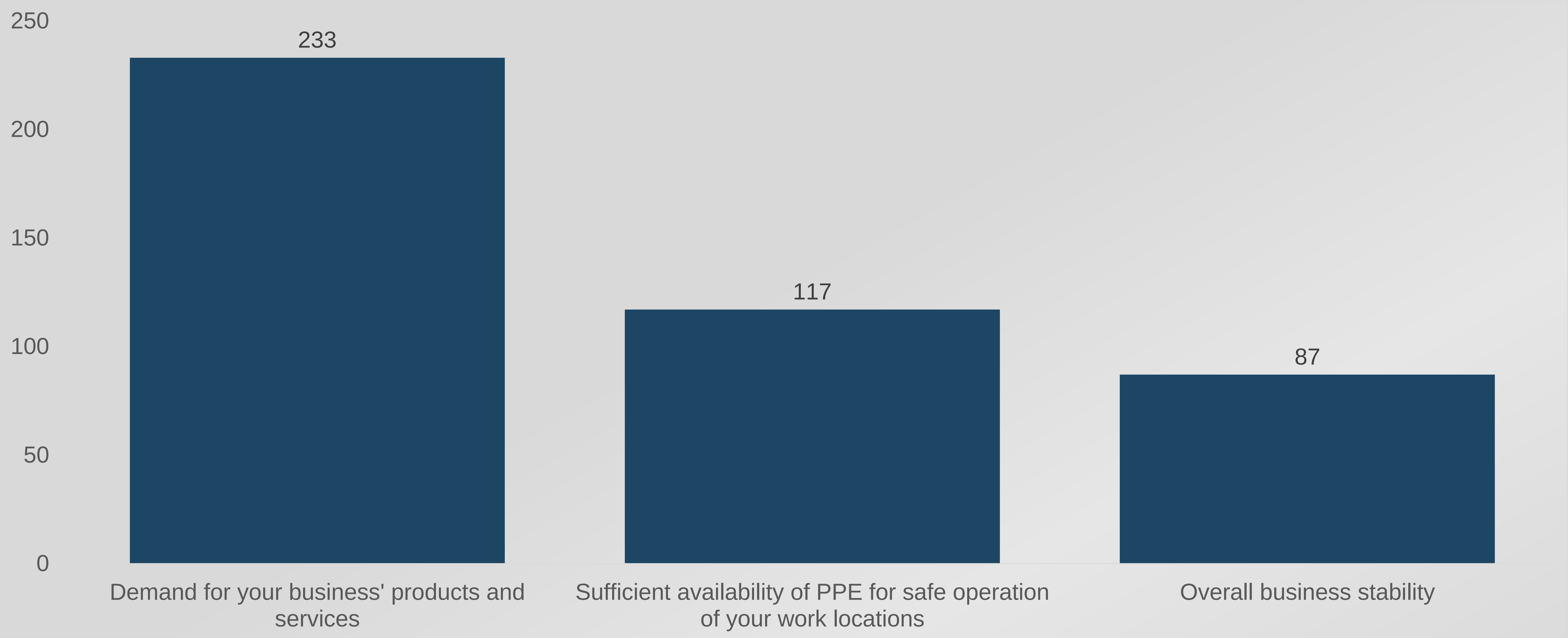
Negative Workforce Impacts

Figure 5: Significantly negative impacts on respondents' workforce during COVID-19, responses with greater than 100 employers identifying the factor as a significantly negative impact, n=903



Positive Workforce Impacts

Figure 6: Positive impacts on respondents' workforce during COVID-19, responses with greater than 50 employers identifying the factor as a positive impact, n=903



Overall Workforce Impacts

Table 2: Overall impacts on respondents’ workforce during COVID-19, n=903

Impact	Public transportation Availability	Childcare availability for employees	Employee mental health	Uncertainty/ concern regarding employment stability	Retention of existing employees	Recruitment of new employees	Employee productivity	Sufficient availability of PPE for work locations	Demand for your business' products and services	Overall business stability	Changing rules relating to capacity limits	Changing rules for daycares and secondary	Changing rules for post-secondary, trade, or adult education programs
Positive Impact	24	11	13	12	27	40	44	117	233	87	24	15	11
No change	473	147	196	297	427	202	344	464	211	262	210	190	310
Negative Impact	77	236	466	363	246	277	359	170	258	379	349	312	233
Significant Negative Impact	23	69	132	142	74	244	70	28	140	147	225	138	91
Not Applicable	288	423	80	78	117	126	75	107	54	19	82	234	244

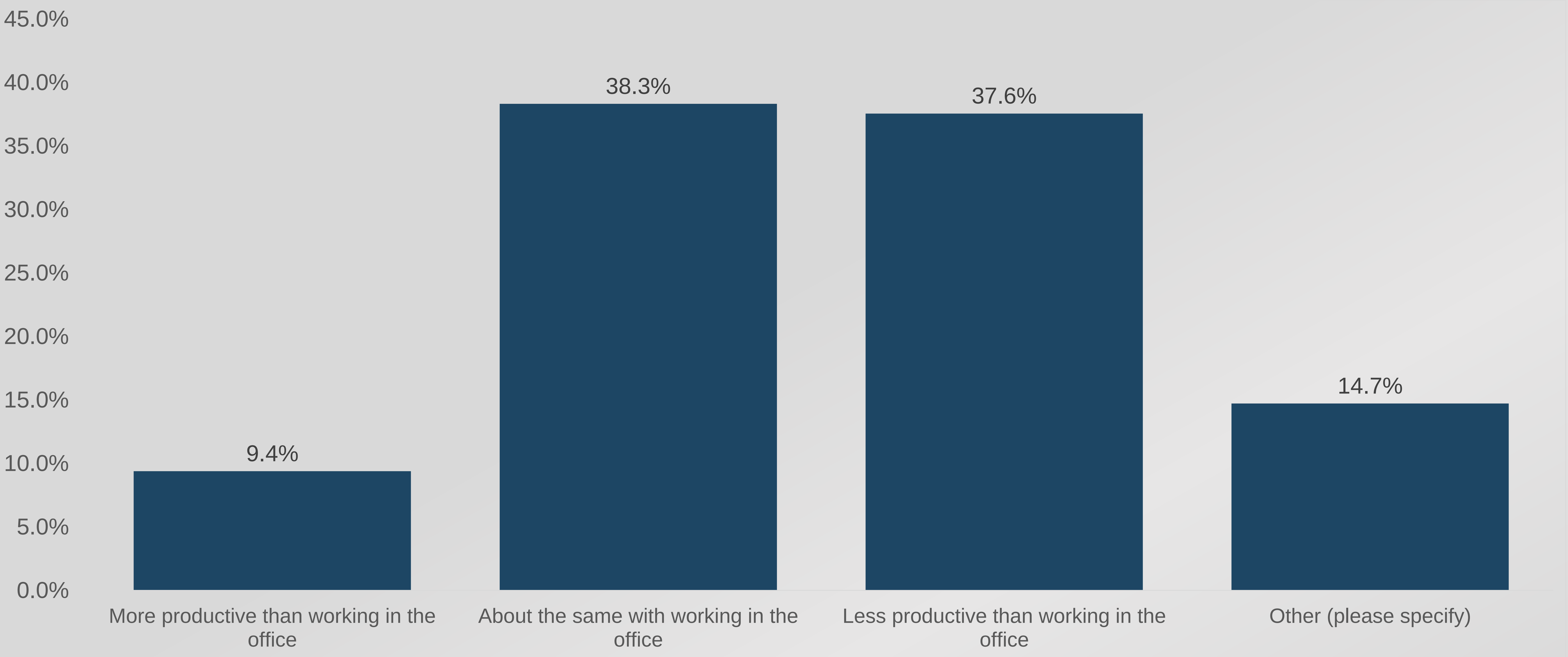
Overall Workforce Impacts

Table 3: Overall impacts on respondents’ workforce during COVID-19 (proportional), n=903

Impact	Public transportation Availability	Childcare availability for employees	Employee mental health	Uncertainty/ concern regarding employment stability	Retention of existing employees	Recruitment of new employees	Employee productivity	Sufficient availability of PPE for work locations	Demand for your business' products and services	Overall business stability	Changing rules relating to capacity limits	Changing rules for daycares and secondary	Changing rules for post-secondary, trade, or adult education programs
Positive Impact	2.7%	1.2%	1.5%	1.3%	3.0%	4.5%	4.9%	13.2%	26.0%	9.7%	2.7%	1.7%	1.2%
No change	53.4%	16.6%	22.1%	33.3%	47.9%	22.7%	38.6%	52.4%	23.5%	29.3%	23.6%	21.4%	34.9%
Negative Impact	8.7%	26.6%	52.5%	40.7%	27.6%	31.2%	40.2%	19.2%	28.8%	42.4%	39.2%	35.1%	26.2%
Significant Negative Impact	2.6%	7.8%	14.9%	15.9%	8.3%	27.4%	7.8%	3.2%	15.6%	16.4%	25.3%	15.5%	10.2%
Not Applicable	32.5%	47.7%	9.0%	8.7%	13.1%	14.2%	8.4%	12.1%	6.0%	2.1%	9.2%	26.3%	27.4%

Work From Home Productivity

Figure 7: Work from home productivity among respondents who supported remote work during the COVID-19 pandemic (proportional), n=394



Priorities for 2022

Table 4: Respondent business priorities for 2022, n=774

2022 Business Priority	Respondents	% of Respondents
Attracting new employees	366	47.3%
Increasing marketing / promotional activities to increase customer awareness	314	40.6%
Increasing the online presence / activity of your business	288	37.2%
Implementing new technologies/systems to automate or improve processes	225	29.1%
Finding and applying to current provincial and federal government funding programs	219	28.3%
Offering co-op, internship, apprenticeship and/or work placements	205	26.5%
Obtaining a better understanding of current provincial and federal government funding programs	194	25.1%
Forming local partnerships / buying local	181	23.4%
Providing external training or professional development opportunities for your staff (example digital skills)	155	20.0%
Increasing equity / diversity / inclusion (or EDI) practices in your business (hiring, staff training, client relations, etc.)	141	18.2%
Expanding my business (to a larger location or adding another location)	130	16.8%
Increasing diversity among employees (Sex/Gender, LGBTQ2AI+, Black, Indigenous, People of Colour, Newcomers, People with Disabilities, etc.)	126	16.3%
Seeking financing for my business (increasing debt or pursuing investment)	117	15.1%
Increasing environmental protection (or "Green") activities in your business	107	13.8%
Obtaining a better understanding of current government mandated COVID-19 rules	104	13.4%
Wanting help in accessing the immigrant/newcomer talent pool	93	12.0%
Examining and/or modifying the amount of office/storefront/warehouse space used by the business	76	9.8%
None of the above	70	9.0%
Undertaking research and development activities	70	9.0%
Winding down or transitioning business to a new owner	61	7.9%
Other (please specify)	50	6.5%
Finding local COVID-19 related suppliers and services providers	42	5.4%
Pursuing international export opportunities	27	3.5%
Obtaining a better understanding of current provincial government COVID-19 rules	0	0.0%
Obtaining a better understanding of current City of Hamilton government COVID-19 rules	0	0.0%

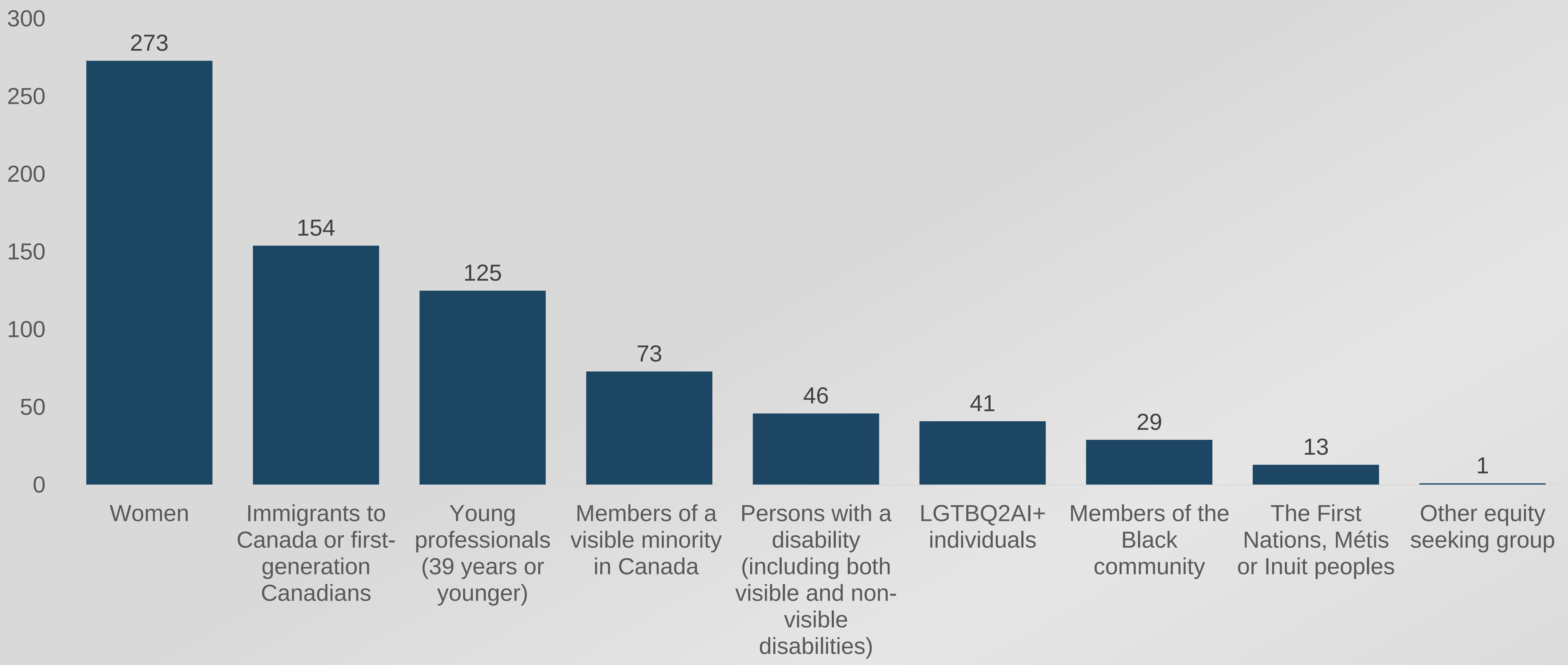
Concerns for 2022

Table 5: Respondent business concerns for 2022, n=779

2022 Business Concern	Respondents	% of Respondents
The impacts of inflation on my business and my customers	435	55.8%
The mental and physical health of the employees of the business	392	50.3%
The inability to reasonably predict the business environment in the short term	336	43.1%
The mental and physical health of the owners of the business (including myself)	307	39.4%
Global supply chain issues relating to receiving goods for resale from suppliers	294	37.7%
Global supply chain issues relating to shipping products to customers	200	25.7%
Existing business debt levels	186	23.9%
Managing uncooperative, non-compliant or aggressive customers/patrons related to mandated COVID-19 rules	177	22.7%
The rising level of personal debt directly related to the business	168	21.6%
Succession planning	141	18.1%
Ability to obtain financing to continue operating my business (either debt or equity financing)	136	17.5%
Having to downsize my business and reduce existing employment levels	130	16.7%
Having to permanently close my business	127	16.3%
Criminal activity and/or the perceived safety in the immediate area my business operates	90	11.6%
The impacts of climate change	83	10.7%
Availability of land or facilities to enable growth or expansion in Hamilton	76	9.8%
Other (please specify)	58	7.4%
I do not have any concerns	46	5.9%

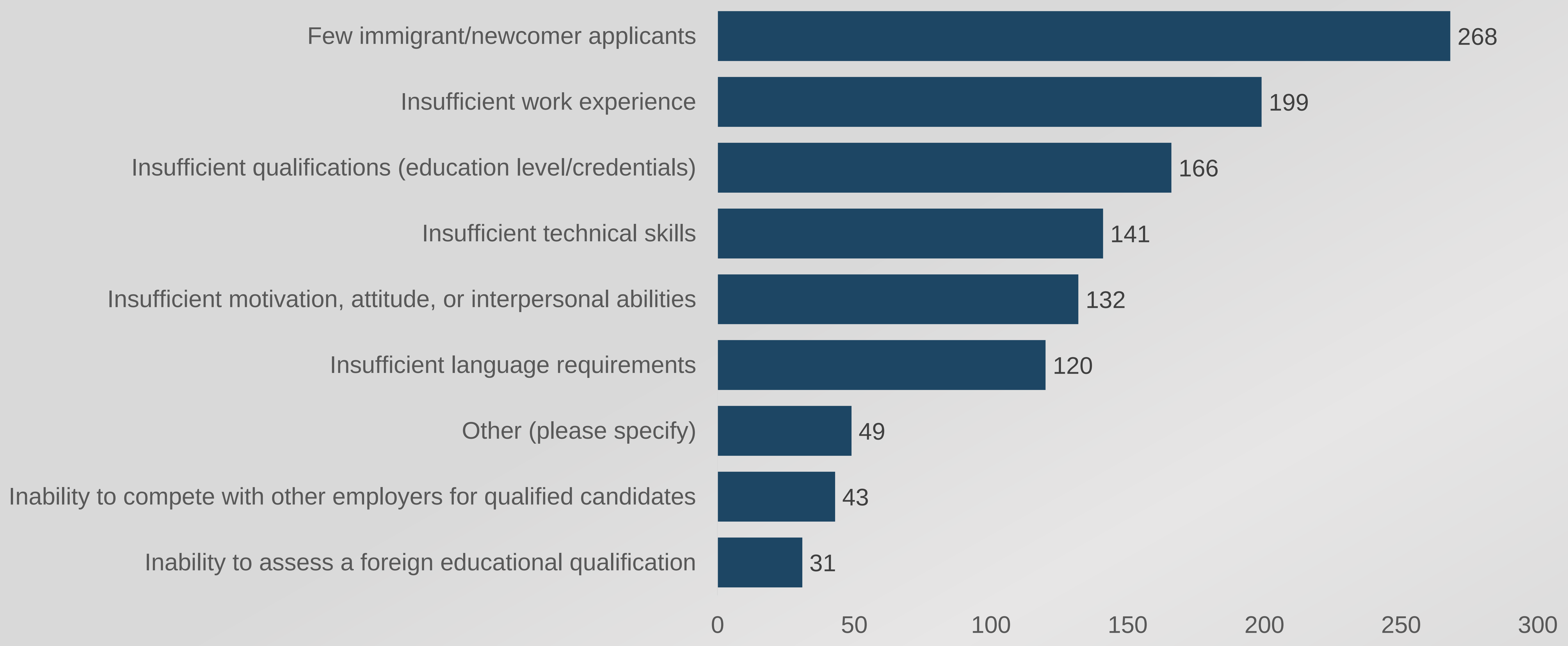
Equity Seeking Ownership

Figure 8, Respondents where at least 1 owner is a member of an equity seeking group, n=915



Barriers to Hiring Immigrants and Newcomers

Figure 9, Identified barriers to hiring newcomers among respondents who identified at least one barrier, n=577



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