Survey of labour and issues confronting Gatineau Valley companies

RESEARCH REPORT

Presented to the Gatineau Valley and its partners

SADC
Société d'aide au développement des collectivités
VALLÉE-DE-LA-GATINEAU

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BIP RECHERCHE

Table of Contents

Highlights

Highlights (1/5)

Objectives and methodology

- The Gatineau Valley SADC and its partners, Services Québec and the Gatineau Valley SADC, retained BIP Recherche to conduct a survey of companies on its territory to gain a picture of the labour situation (job profiles, forecasts over the next three years, recruiting, training) and identify the issues confronting companies.
- Data was collected using a combined telephone-online method from November 28, 2022 to January 19, 2023. There were 233 respondents, the margin of error was 5.1% and the response rate was 42.3%.

Respondent profiles

- The breakdown of respondents per sector was as follows: 21% in the primary sector, 79% in the tertiary sector (including 24% in retailing, 12% in accommodation, restaurants and tourism, 14% in the public and para-public sectors and 29% in the other services).
- 34% of companies have less than 5 employees, and 13% have 20 and over. More than two-thirds of respondents either own or co-own their company.

Job profiles

- The 233 companies surveyed have a **total of 3.254 employees, which averages out to 14 per company**, but the median is far lower (7). They break down as follows: **8.3% full time** (59%), **2.9% part time** (21%) and **2.8 seasonal** (20%). However, 42% have no part-time employees and 53% have no seasonal employees. The public and para-public sectors have a much higher average number of employees (28.3%).
- Respondents employ slightly more **men (54%)** than **women (46%),** but the differences are much larger depending on the sector (men account for 81% of employees in the primary and secondary sectors and women 58% in the public and para-public sectors).

Highlights (2/5)

Job profiles (cont'd)

- The workforce is relatively older : **30% of employees are less than 35** (12% less than 25) and **30% are 55 and over**. Employees in the primary and retail sectors are younger on average, while workers in the secondary sector are older.
- Close to half of employees (45%) have less than 5 years' seniority and 22% have 15 years and over.
- **52.8% of jobs are low-skilled or unskilled**, i.e., they do not require a diploma or just a general high school diploma, whereas **12% are highly qualified jobs** requiring university training. More low-skilled or unskilled jobs are in the primary sector, accommodation, restaurant and tourism sector and in retailing. There is a greater proportion of highly skilled jobs in the public and para-public sectors.

Job forecasts

- 75%, 68% and 67% of respondents able to respond will have at least one job vacancy in 2023, 2024 and 2025 respectively.
- The **forecasted average number of job vacancies** per company will be **3.7 in 2023, 2.7 in 2024 and 3 in 2025**. A projection including respondents unable to respond (in other words all 233 respondents) shows that there will be **861, 636 and 695 job vacancies for each of the three years** for a grand total of 2,192.
- From a qualification standpoint, the vacancies break down as follows: 11% highly qualified, 35% skilled or semi-skilled and 54% low-skilled or unskilled.

Highlights (3/5)

Recruiting

- In a context of labour shortages, the main actions that respondents have taken or would be willing to take include hiring **people from Indigenous communities** (72%), **retirees** (71%), **immigrants or members of cultural communities** (67%) and those **less qualified than the employers would like** (57%).
- Conversely, the least mentioned groups were workers with a criminal record (30%) or with mental health issues (25%).

Training

- According to the companies surveyed, the training approach most preferred is **on-the-job learning** (80%). Other approaches (recognition of acquired competencies, in-class training, online training, work-study were found suitable by about half of the respondents.
- There is a wide range of **training requirements,** but the top five most often cited are in:
  - Occupational health and safety (56%);
  - Office automation, secretarial services and accounting (43%);
  - Management: administration, human resources management, communication, marketing, etc. (42%);
  - Technology and computers (32%);
  - Technical training in industrial trades (agri-food, manufacturing, construction sectors, storage, transport, etc.). (28%).

Highlights (4/5)

Issues and challenges

- In the next few years, the most important issues or challenges confronting the companies surveyed are:
  - employee **recruiting** (86 %) and **retention** (84%);
  - **Improving the image and attractiveness of** the company and **employee competency development** (82% each);
  - **Reducing the environmental footprint** (71%);
  - **Cybersecurity** (64%);
  - **Supplier requirements** and the implementation of digital t**echnologies** (57% each);
  - **Innovation** (products, processes, services, marketing) (55%) and **changing behaviours** of workers (55% each).
- To meet these challenges, respondents mentioned several types of needs for assistance or consulting support, mainly an employee training or development plan (54%), assistance with promoting the company's image (employer marketing) (46%), information on the latest human resources management trends (43%), exchanges or networking with other companies to find out the action they have taken (42%) and assistance with innovation (40%).

Cybersecurity

- **31%** of respondents are aware of **Quebec's Law 25 to come into force** in September 2023 to modernize legislative provisions as regards the protection of personal information
- **53%** believe that **the risk of their falling victim to computer security incidents is *very important or rather important*** (intrusions, hacking, ransom, etc.). However, only 9% were the target of computer security incidents in the past three years.
- **Half of the companies implemented measures to strengthen the security of their information and management systems** in the past three years. Two-thirds of them are planning on further strengthening these measures in the coming year.

Highlights (5/5)

Sustainable development and environmental management

- Overall, **the respondents had a good understanding** of the sustainable development concept. Three-quarters believe that the economic, social or environmental dimensions are included in this concept, while two-thirds believe that the three are included.
- Slightly less than two-thirds of the companies (64%) have made commitments to reduce their environmental footprint, but **these commitments only have quantifiable targets in 6% of the cases**. Of those that have not made any commitments, one-third intend to do so in the next two years.
- Customers of only 27% of the respondents have demanded that the latter make a commitment to reduce their environmental footprint.
- To reduce their environmental footprint, the aspects deemed most important by respondents are **waste management** (average of 8.2/10), **energy efficiency** (7.6/10) and **water management** (7.5/10).

Company management succession

- Slightly more than one-third of respondents (35%) **plan on giving up their ownership of the company in the next five years.**
- Of those planning to leave, **the planning process is not too far along**: 49% have begun thinking about it and 25% have lined up a successor.

Objectives and methodology

Objectives and methodology(1/5)

OBJECTIVES

The Gatineau Valley SADC– and its partners Services Québec and the Gatineau Valley RCM – retained BIP Research to survey companies on its territory. The purpose of this survey is to document an action plan on the area's requirements with respect to the current labour situation confronting companies and their upcoming needs over the next one to three years. It will also define companies' needs to better orient strategic actions to support entrepreneurs as they adjust their business model.

This survey is further to the one conducted four years ago in late 2018 which focused exclusively on human resources, but this time, the survey examines other themes in addition to the labour situation. The following is a list of the specific objectives.:

- Prepare a profile of the jobs in companies operating on the territory: number of employees according to status, breakdown of jobs according to gender, age, seniority and level of qualification, etc.
- Make job forecasts over the next three years (2023 to 2025).
- Identify recruiting actions taken by companies to deal with the labour shortage.
- Determine training requirements.
- Identify the main issues and challenges confronting companies.
- Delve more deeply into the cybersecurity problem.
- Examine in greater detail the problems of sustainable development and environmental management.
- Gain an idea of what business owners have been doing in terms of succession (owner profile, projected departure, stage they ae at in their succession planning).

Objectives and methodology(2/5)

TARGETED COMPANIES AND SAMPLE

- Companies located on the territory of the Gatineau Valley RCM.
- They have at least one salaried employee, whether full time, part time or seasonal.

We sought to have either the owner or the general manager respond to the survey. If neither was available, we went with another manager such as the human resources or the production/operations manager.

We wish to point out that the data from companies with establishments or outlets outside the Gatineau Valley RCM is excluded from this survey.

The sample was developed using two sources – the data base used during the 2018 survey and a list purchased from Data Axle Canada (previously Info Canada). The total sample includes 1.408 names of companies that are theoretically established in the Gatineau Valley RCM, once duplications between both data bases and within each base have been eliminated.

QUESTIONNAIRE

The questionnaire includes 80 variables and was designed jointly by SADC and its partners along with BIP Recherche.

If the person responding to the survey was not the owner of the business, the section on business succession (six variables) did not apply.

The questionnaire appears in the index.

Objectives and methodology(3/5)

DATA COLLECTION METHOD

Data was collected at three different times:

- Shortly before collection began, the partners promoted the survey with companies on the territory to encourage them to respond.
- BIP Recherche used a combined telephone-online method. All respondents were first contacted by telephone in either French or English. Once the introduction was read and the objectives explained, eligible respondents agreeing to participate could choose between responding by phone or online. We sent those who choose to respond online an invitation email with a link providing them access to the survey.
- Those opting for the online method were phoned or emailed (if we could not reach them by phone) one week after the link was sent out from those who did not complete the questionnaire and send it in. If needed, four telephone reminders were used.

The questionnaire was available in French and in English as per the respondent's preference. Completing the questionnaire took about 20 minutes.

The questionnaire was piloted with about ten or so companies on November 28, 2022. No changes were made to the questionnaire following the pretest. Data collection *per se* ran from November 30, 2022 to January 19, 2023 with a two-week pause during the Christmas season.

Objectives and methodology(4/5)

SAMPLE AND PARTICIPATION RATE

Data was collected from **233 respondents**, 135 by phone (58%) and 98 online (42%).

The data base from which data was collected was of poor quality. Of the 1.408 names, 790 (56%) were invalid, outside the sample or ineligible. The actual population consisted of 618 names.

The response rate was 42.3%, a high figure for a company survey. By comparison, the corresponding figure for the 2018 survey was 35%.

The maximum margin of error for a sample of that size for a finite population is ±5.1%, 19 times out of 20.
(Translation of the French below appears on the notes page)

(1) Pour qu'un numéro puisse être considéré comme *pas de réponse*, il doit correspondre à un numéro qui a toujours été sans réponse tout au long de la collecte de données. Ainsi, par exemple un rendez-vous non complété pour lequel il n'y a pas de réponse au moment du rappel doit être considéré comme *rendez-vous non complété* et non pas comme *pas de réponse*.

(2) Présenté selon les normes de l'ARIM.

(3) TAUX D'ADMISSIBILITÉ : $\frac{D+E}{B+D+E}$ $\frac{470}{864}$ **0.54**

		Frequence	TOTAL
Generated numbers			1 408
A.	**Invalid numbers**		396
	Out of service/no telephone contact	321	
	Residential	69	
	Fax / Modem	6	
B.	**Numbers outside the sample/ineligible**		394
	Company closed	107	
	Outside the sector: not on the Gatineau Valley RCM	20	
	No salaried employee (self-employed worker)	267	
C.	**Numbers in the sample where eligibility could not be established**		148
	No answer/voicemail (1)	96	
	Refused before eligibility could be established	52	
D.	**Eligible numbers in the sample where the interview was not completed**		237
	Prolonged absence	4	
	Incomplete questionnaires (refused to complete)	6	
	Appointment set but interview not completed (respondent absent) or appointment set for after the collection period ended	79	
	Web link sent and questionnaire not completed	47	
	Refused after eligibility was established	101	
E.	**Completed interviews**		233
Response rate calculation (2)	$\frac{E}{C \times (TA^{(3)})+D+E}$ $\frac{233}{551}$		**42,3%**

Objectives and methodology(5/5)

SEGMENTATION VARIABLES

The findings were analyzed using several segmentation variables (see table below). They were used to perform a bivariate statistical analysis where dependent variables were crossed with independent or segmentation variables, a process intended to identify whether there were statistically significant differences per respondent sub-group.

	The entire questionnaire, except the section on the company's succession.	Section: within the purview of company management
Segmentation variables	NCIAS activity sector	NCIAS activity sector
	Total number of employees (less than 5; 5 to 14; 15 and over)	Total number of employees (less than 5; 5 to 14; 15 and over)
	Establishment according to gender: mostly women(> 60%); parity (40% to 60%); mostly men (> 60%)	Gender of business owner (man; woman)
	Establishment according to age: overrepresented by 25 and under (25% and over); overrepresentation under 55 and over (25% and over)	Owner's age (<45 yrs; 45-54 yrs; 55-64 yrs; 65 and over)
	Establishment according to qualification: mostly skilled jobs (highly and semi) (60% and over); mostly low/unskilled jobs (60% and over); pretty much the same (40% to 59%)	Business owner's education (high school or less, college, university)
	Business owner (yes, no)	Number of years as owner (<5 yrs; 5-9 yrs; 10-19 yrs; 20 yrs and over)
	Commitments to reduce environmental footprint (yes, no)	

FINDINGS

Figures/symbols in colour and items in shaded bubbles indicate significantly different findings *(lower **in red**, upper **in green**)*, from a statistical standpoint than those noted from other respondents (according to a confidence interval of 95% or over).

The total may not match the sum of the parts (e.g., 99% or 101%) due to rounding or to a no answer. The total can even far exceed 100% for questions where several options were possible.

1. Respondent profiles

Activity sector

	TOTAL Businesses	SECTORIAL GROUPS
BUSINESS ACTIVITY SECTOR	*(n=233)*	*(n=233)*
Agriculture, forestry, fishing and hunting (n=18)	8%	**Primary and secondary sectors 21%**
Construction (n=20)	9%	
Manufacturing (n=10)	4%	
Retailing (n=56)	24%	**Retailing 24%**
Accommodation, restaurants and tourism (n=28)	12%	**Accommodation, restaurants and tourism 12%**
Wholesaling (n=2)	2%	**Tertiary sector – other services 29%**
Transport and storage (n=9)	4%	
Arts, performances and leisure (n=5) /Information industry and culture industry (n=2)	3%	
Finances and insurance (n=2)	1%	
Real estate services and rental services (n=2)	1%	
Professional, scientific and technical services (n=14)	6%	
Administrative, support, waste management and purification services (n=8)	3%	
Other services except for public administrations (n=25)	11%	
Health care and social assistance (n=14)	6%	**Public and para-public sectors (health-social services and education) 14%**
Teaching services (n=5)	2%	
Public administration (n=13)	6%	

Tertiary sector

79 %

The primary and secondary sectors account for 21% of the respondents.

79% of the respondents work in the tertiary sector, including 18% in retailing, 12% in accommodation, restaurants and tourism, 14% in the public and para-public sectors (health-social services and education) and 29% in other tertiary sector services.

Activity sector – imported variable. Base: All respondents (n=233).

Size

	TOTAL companies
NUMBER OF EMPLOYEES (full time, part time and seasonal)	*(n=233)*
1 to 4	34%
5 to 14	36%
15 to 24	17%
20 to 49	9%
50 and over	4%

One-third of businesses are micro businesses (fewer than 5 employees), 36% have between 5 and 14 employees and only 4% have 50 employees and over.

Ownership

	TOTAL companies
OWNER OR CO-OWNER OF THE BUSINESS	*(n=233)*
Yes	63%
No	37%

Close to two-thirds of respondents own or co-own the business.

Q3. Including yourself, how many employees work in your business? Base: All respondents (n=233).
Q1d. Do you own the business? Base: All respondents (n=233).

2. Job profiles

Number of employees (1/2)

The 233 companies surveyed have a total of 3.254 employees. The companies, on average, have 14 employees, including 8.3 full-time (59 %), 2.9 part time (21 %) and 2.8 seasonal (20 %). More than four out of ten have no part-time employees (42%) and more than half do not have any seasonal employees (53%). These averages are pulled up by respondents with 25 employees and over. As a result, the median is a more representative indicator of the situation when determining the total number of employees. The median is 7.

In comparison with the 2018 survey, the number of full-time employees is slightly higher, and the numbers of part-time and seasonal employees are lower.

	TOTAL	Full time	Part time	Seasonal
	(n=233)	*(n=233)*	*(n=233)*	*(n=233)*
Number of employees				
None	0%	6%	42%	53%
1 to 4	34%	50%	42%	33%
5 to 14	36%	27%	12%	11%
14 to 24	17%	10%	4%	3%
25 to 49	9%	5%		
50 and over	4%	2%		
AVERAGE NUMBER OF EMPLOYEES	**14**	8.3 ↑	2.9 ↓	2.8 ↓
Average number of employees 2018	*14.9*	*7..4*	*3.9*	*3.6*
MEDIAN	**7.0**	4.0	1.0	0.0
Total number of employees	**3 254**	1 936	675	643

Average calculations include zeros.

TOTAL – highest average number:
- Public and para-public sectors (28.3)
- Non-business owner(21.5)
- Environmental commitments (16.0)

Full time – highest average number:
- Public and para-public sectors (18.4)
- Non-business owner (13.3)

PART TIME – highest average number:
- Public and para-public sectors (7.0)
- Non-business owner(4.2)
- Environmental commitments (3.7)

SEASONAL – Highest average number:
- Primary sector (4.9)
- Accommodation, restaurants and tourism (8.4)
- >60 % low-skilled or unskilled employees(4.1)
- Non-business owner (4.0)
- Environmental commitments (3.5)

Q3. Including yourself, how many employees work in your company?
Base: All respondents (n=233).

Number of employees(2/2)

Number of employees based on the main activity sectors

Number of employees	ALL SECTORS	PRIMARY AND SECONDARY SECTORS	Primary sector	Secondary sector	TOTAL TERTIARY SECTOR	Retail	Accommodation, restaurants and tourism	Public and para-public sectors	Tertiary sector – other services
	(n=233)	*(n=48)*	*(n=18)*	*(n=30)*	*(n=185)*	*(n=56)*	*(n=28)*	*(n=32)*	*(n=69)*
Full time – average number	8.3	5.6	**3.7**	6.8	9.0	9.6	6.4	**18.4**	**5.3**
Part time – average number	2.9	**0.9**	**1.1**	**0.8**	3.4	4.5	2.5	**7.0**	**1.2**
Seasonal – average number	2.8	3.4	**4.9**	2.5	2.6	**1.1**	**8.4**	3.0	**1.3**
TOTAL – average number	14.0	**10.0**	**9.7**	**10.2**	15.0	15.1	17.3	**28.3**	**7.8**
TOTAL – total number	**3 254**	**480**	175	305	**2 774**	846	484	907	537
Distribution of no. of employees	100%	14.8%	5.4%	9.4%	85.2%	26.0%	14.9%	27.9%	16.5%

The average number of employees is significantly higher in companies in the public and para-public sectors (full time, part time and total) and for seasonal employees in companies in the accommodation, restaurants and tourism sector and the primary sector (which consists mainly of farming companies).

It is significantly lower in the other services in the tertiary sector (full time, part time, seasonal and total), in the primary sector (full time, part time and total), in the secondary sector (part time only) and retailing (seasonal only).

Q3. Including yourself, how many employees work in your company?
Base: All respondents (n=233).

Number of positions

The companies that responded have an average of 8.6 employees, an average that is pulled up by respondents with 20 positions and over. As a result, the median is a more representative indicator of the situation to determine the total number of positions. The median, in this instance, is 4.0. With respect to the data on the number of employees (page 17), it is noted that the number of employees is 1.63 times greater than the number of positions.

The average number of positions is significantly higher in companies in the public and para-public sectors and the accommodation, restaurant and tourism sector. It is lower in companies in the primary sector and in other tertiary sector services.

	TOTAL
	(n=233)
Number of positions	
1 or 2	28%
3 to 5	32%
6 to 9	18%
10 to 19	15%
20 and over	8%
AVERAGE NUMBER OF POSITIONS	**8.6**
MEDIAN	**4.0**

Don’t know answers (7%) have been excluded from the calculations.

+

Highest average number:
- Public and para-public sectors (20.0)
- Accommodation, restaurants and tourism (11.7)
- Non-business owner(14.3)

–

Lowest average number:
- Primary sector (4.9)
- Tertiary sector (5.3)
- Company owner (5.1)

Q4. How many jobs does your company have? Base: All respondents (n=233).

Distribution of employees according to gender (1/2)

On average, the respondents employ slightly more men (54%) than women (46%). The distributions in the 2018 survey were exactly the same.

However, there were significant variations in the gender-based distribution depending on the business category (see the bullets in the lower right and the graph on the following page). For example, the proportion of men in the primary and secondary sectors is quite high at 81%. Conversely, women are a majority in the tertiary sector in general (53%), particularly in the public and para-public sectors (58%), accommodation, restaurants and tourism (55%) and in retailing (55%).

	Men	Women
	(n=233)	*(n=233)*
Proportion of employees		
0% to 9%	12%	17%
10% to 49%	22%	28%
50% to 89%	47%	40%
90 to 100%	18%	14%
AVERAGE DISTRIBUTION	**54.0%**	**46.0%**
Average distribution in 2018	*54.3%*	*45.7%*

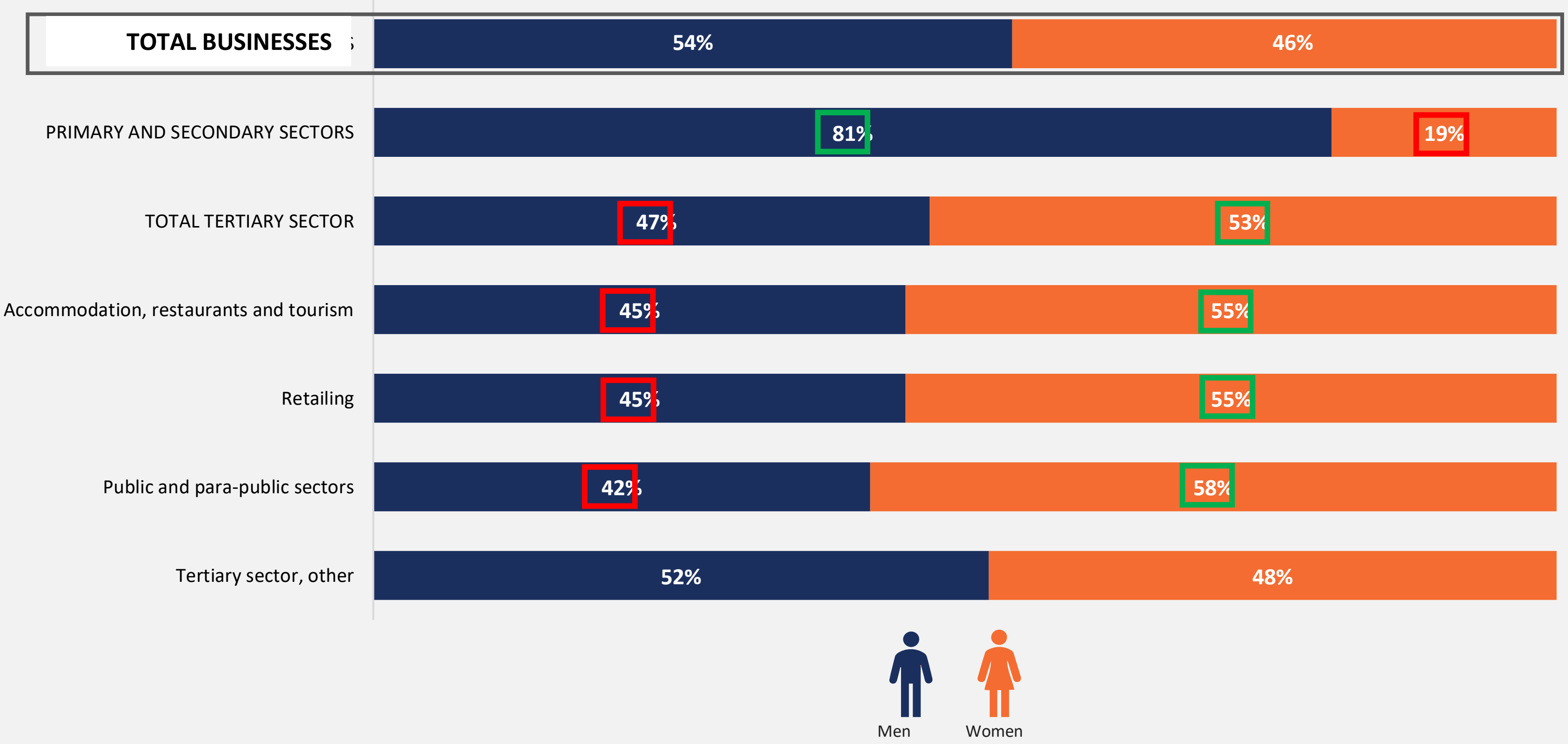
+ **MEN – highest proportion:**
  - Primary and secondary sectors (81.3%)
  - Company owners (59.7%)

+ **WOMEN – highest proportion:**
  - Tertiary sector (52.9%)
  - Public and para-public sectors (57.7%)
  - Accommodation, restaurants and tourism (55.3%)
  - Retailing (55.3%)
  - Non-business owner (55.6%)

Q5. Please provide a distribution of your employees based on gender in %.
Base: All respondents (n=233).

Distribution of employees according to gender(2/2)

Average distribution of employees based on gender in the main activity sectors



Q5. Please provide a distribution of your employees based on gender in %.
Base : All respondents (n=233).

Distribution of employees according to age (1/2)

Data on employee ages show that the respondents' workers are somewhat older. Seven in ten (70%) are 35 and over, and close to one-third (30%) are 55 and over. Only 12% are under 25, and 45% of companies employ no one under 25. Any variations with the 2018 survey are minimal and insignificant.

The proportion of young employees (less than 25) exceeds the average in the primary sector and lower than the average in the other tertiary sector services. The proportion of employees in the public and para-public sectors is above average in the 35-54 segment.

The proportion of older employees (55+) is higher than the average in other tertiary sector services, microbusinesses (1-4 employees) and in those where the owner was the respondent. It is below the average in the public and para-public sectors.

	Less than 25	25-34 yrs	35-54 yrs	55 and over
	(n=233)	*(n=233)*	*(n=233)*	*(n=233)*
Proportion of employees				
0%	45%	37%	14%	23%
1% to 49%	50%	54%	45%	49%
50% and over	5%	9%	41%	29%
AVERAGE DISTRIBUTION	**12.4%**	**17.6%**	**39.8%**	**30.2%**
Average distribution in 2018	*11.7%*	*18.9%*	*39.9%*	*29.5%*

Don't know answers (1%) are excluded from the calculations.

+

LESS THAN 25– highest proportion:
- Primary sector (19.7%)

25-34 YRS – highest proportion:
- 15 employees and over (22.6%)

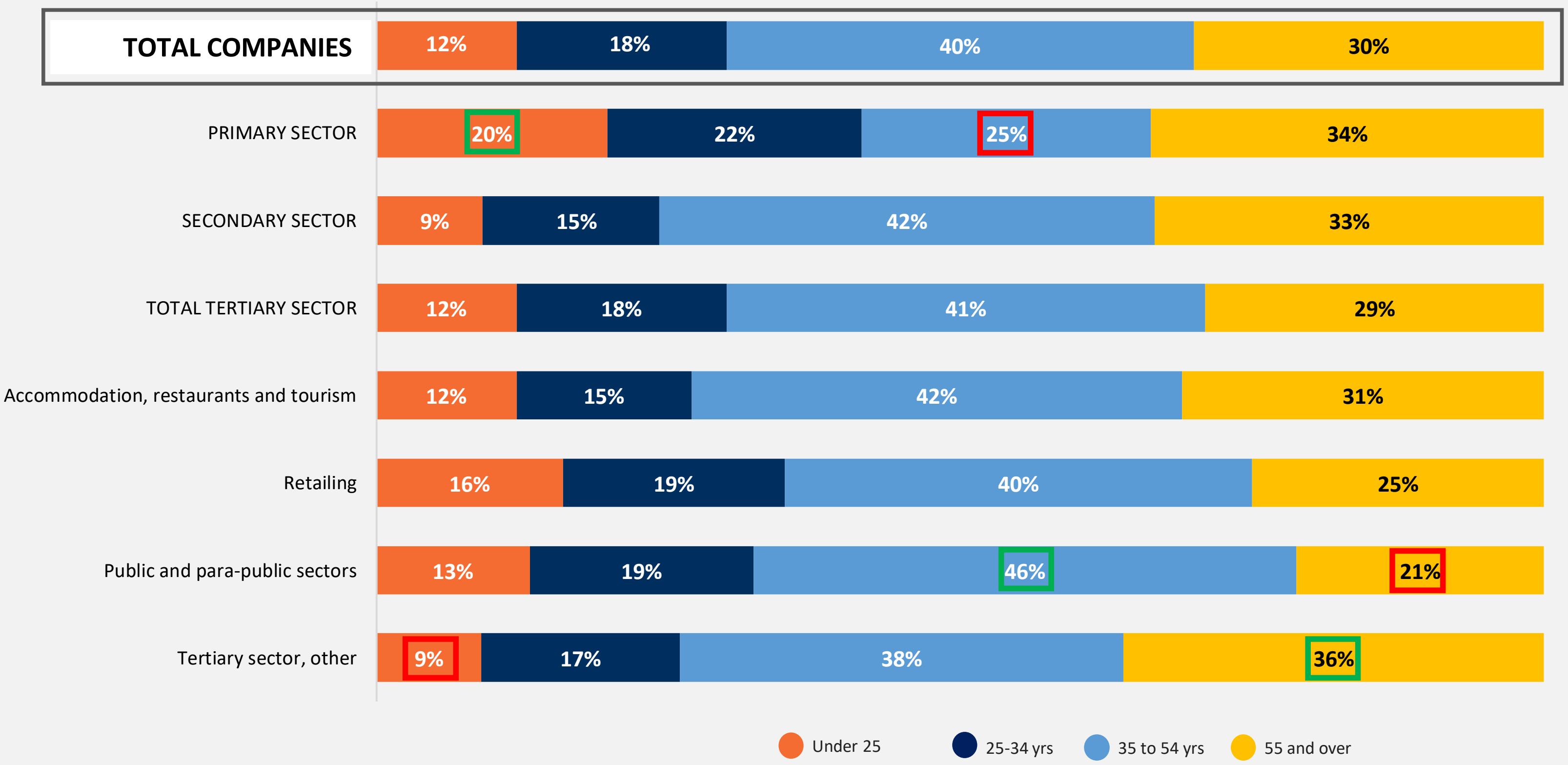
35-54 YRS – highest proportion:
- Public and para-public sectors (46.4%)
- Non-business owner (44.4%)

55+ YRS – highest proportion:
- Tertiary sector, other (35.9%)
- 1 to 4 employees (39.5%)
- Business owner (33.4%)

Q6. Please provide a breakdown of your employees according to their age.
Base : All respondents (n=233).

Distribution of employees according to age(2/2)

Average distribution of employees according to the main activity sectors



Q6. Please provide a breakdown of your employees according to their age.

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Base : All respondents (n=233).

Distribution of employees according to seniority (1/2)

Data on employee seniority shows that close to half (45%) have less than 5 years' seniority and 20% between 5 and 9 years. Slightly more than one in five employees has at least 15 years' seniority. Since the 2018 survey, seniority has decreased significantly: those with less than 5 years are up by 5.9 percentage points and those with 15 years and over are down 4.5%. This could reflect greater labour mobility in a context of full employment and shortages.

The proportion of employees with less than 5 years' experience is higher than the average in retailing and in companies with 5 to 14 employees. The public and para-public sectors and companies with 15 employees and over account for a more significant proportion of employees with between 10 and 14 years of seniority.

The proportion of employees with at least 15 years' seniority is highest in the primary sector and in other services in the tertiary sector, in microcompanies (1 to 4 employees) and among those where the owner was the respondent.

	Less than 5 years	5-9 yrs	10-14 yrs	15 yrs and over
	(n=233)	*(n=233)*	*(n=233)*	*(n=233)*
Proportion of employees				
0%	13%	37%	49%	41%
1% to 49%	38%	46%	43%	39%
50% and over	49%	17%	8%	20%
AVERAGE DISTRIBUTION	**45.5%** ↑	**19.8%**	**13.2%**	**21.5%** ↓
Average distribution 2018	*39.6%*	*21.2%*	*13.2%*	*26.0%*

Don't know answers (2%) are excluded from the calculations.

+

LESS THAN 5 YEARS – highest proportion:
- Retailing (50.8%)
- 5-14 employees (51.8%)

5-9 YRS – highest proportion: None

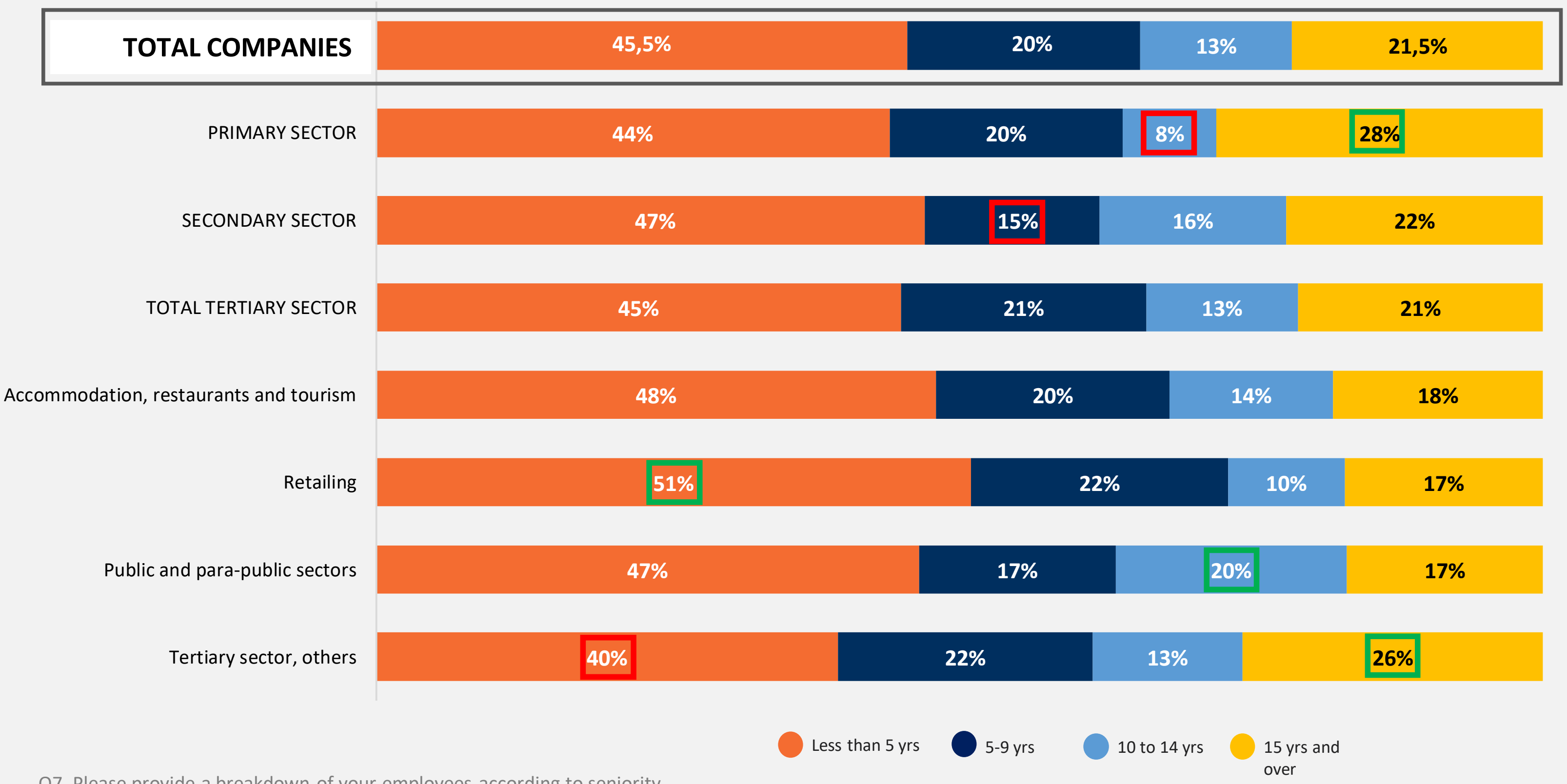
10-14 YRS – highest proportion:
- Public and para-public sectors (19.5%)
- 15 employees and over (16.8%)

15+ YRS – highest proportion:
- Primary sector (28.1%)
- Tertiary sector, others(26.1%)
- 1 to 4 employees (25.7%)
- Business owner (24.5%)

Q7. Please provide a percentage breakdown of employees according to seniority.
Base : All respondents (n=233).

Distribution of employees according to seniority (2/2)

Average distribution of employees according to the main activity sectors



Q7. Please provide a breakdown of your employees according to seniority.
Base: All respondents (n=233).

Breakdown of employees according to job qualification level (1/2)

More than half (52.8%) of employees in the companies surveyed hold low-skilled or unskilled jobs, which require no diploma or only a general high school diploma. Slightly more than one-third (35.2%) occupy skilled or semi-skilled jobs, requiring a technical college diploma (DEC) or a DVS. Highly qualified jobs requiring university training only represent 12% of the total. In fact, 56% of companies surveyed have no highly qualified jobs, and 59% have at least half of their jobs that are filled by low-skilled or unskilled labour. In comparison with the 2018 survey, the proportion of low-skilled or unskilled jobs has edged up (+2.8 points) at the expense of highly qualified and qualified or semi-qualified jobs.

	Very skilled jobs	Skilled or semi-skilled jobs	Low-skilled or unskilled jobs
	(n=233)	*(n=233)*	*(n=233)*
Proportion of employees			
0%	56%	30%	22%
1% to 49%	32%	34%	19%
50% and over	11%	36%	59%
AVERAGE DISTRIBUTION	**12.0%**	**35.2%**	**52.8%**
Average distribution 2018	*13.0%*	*37.0%*	*50.0%*

Don't know answers (1%) are excluded from the calculations.

Highly qualified jobs: generally require university training: managers, management level employees and professionals.
Skilled or semi-skilled jobs: require technical training at the college level (technical DEC) or high school-level vocational (DVS).
Low-skilled or unskilled jobs: require a general high school diploma or no diploma.

\+ **HIGHLY QUALIFIED– highest proportion:**
- Public and para-public sectors (22.9%)
- Tertiary sector, other (17.9%)
- >60 % female employees (20.3%)
- Non-business owner (17.6%)

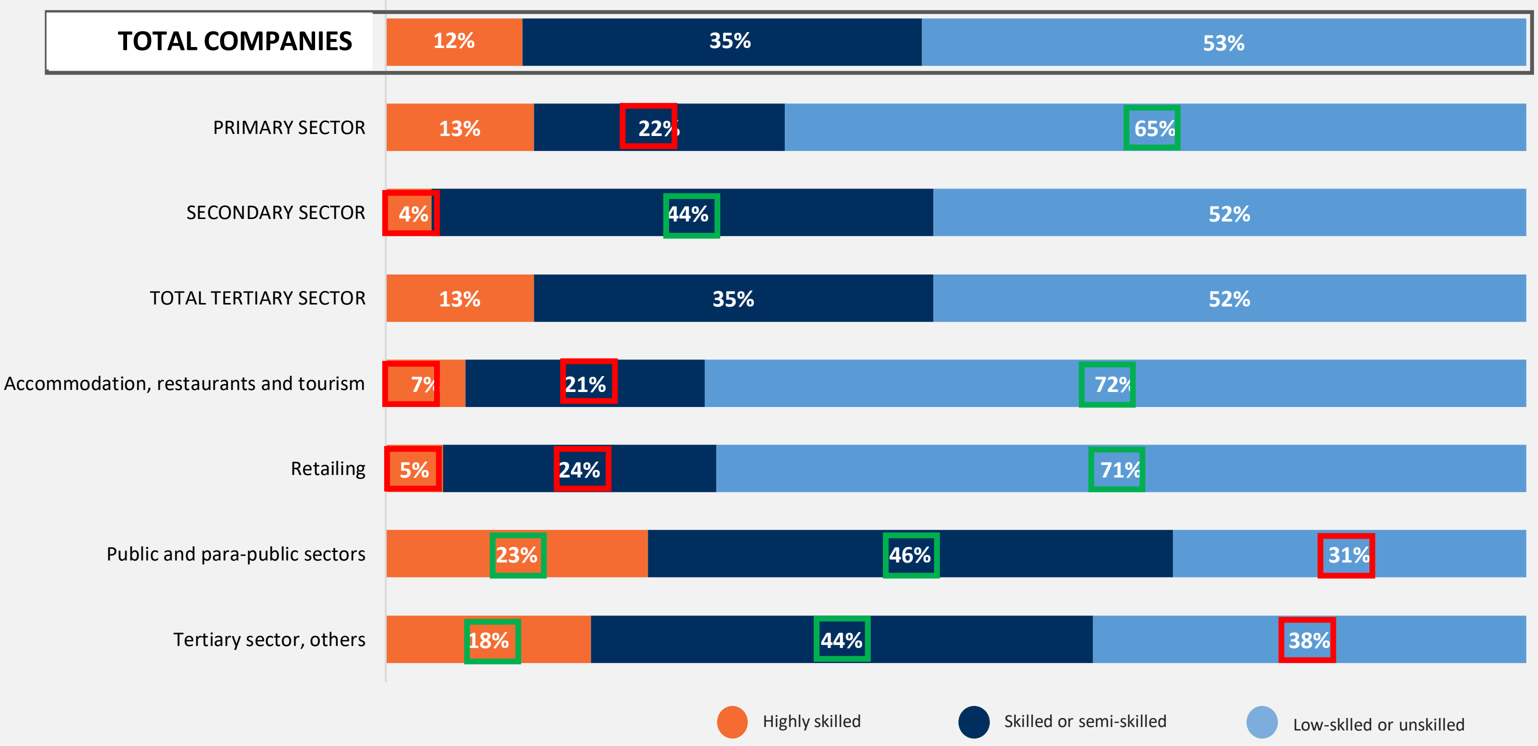
\+ **SKILLED-SEMI-SKILLED – highest proportion:**
- Secondary sector (43.8%)
- Public and para-public sectors (46.1%)
- Tertiary sector, other (44.1%)

\+ **LOW-SKILLED/UNSKILLED – highest proportion:**
- Primary sector (64.7%)
- Accommodation, restaurants and tourism (71.6%)
- Retailing (70.9%)
- As many men as women (63.6%)
- Business owner (58.0%)

Q8. Please provide a percentage breakdown of your job qualification levels.
Base : All respondents (n=233).

Breakdown of employees according to job qualification level (2/2)

Average distribution of employees by qualification level according to the main activity sectors



The proportion of highly qualified jobs exceeds the average in the public and para-public sectors and the other tertiary sector services

At the other end, there are few low-skilled or unskilled jobs in the primary sector, accommodation, restaurant and tourism and retailing sectors.

Skilled or semi-skilled jobs are proportionately more present in the secondary, public and para-public and other tertiary sector services sectors.

Q8. Please provide a percentage breakdown of your job qualification levels.
Base : All respondents (n=233).

3. Job forecasts

Number of jobs to fill (1/2)

Over the next three years, a rather strong majority of respondents – 75% in 2023, 68% in 2024 and 67% in 2025 – will have at least one job vacancy to fill due to job creation or to replacements for retiring employees. Note that the percentage of respondents who could not answer (DNK) has increased over the years: 12% for 2023,
28% for 2024 and 37% for 2025.

Companies able to answer will have, on average, 3.7 (in 2023), 2.7 (in 2024) and 3.0 (in 2025) vacancies to fill. In absolute numbers, there will be 754, 456 and 439 jobs over the next three years respectively, a grand total of 1,649.

If we project these figures to include respondents that could not answer (all 233 survey respondents), vacancies climb to 861, 636 and 695 for each of the next three years, a grand total of 2,192. When the number of jobs to fill is expressed as a ratio of the total number of employees in 2022 (3,254), the figures are 26% in 2023, 20% in 2024 and 21% in 2025. This shows how important filling these vacancies really is.

	2023	2024	2025	TOTAL FOR THE 3 YEARS
n excluding DNK	*(n=204)*	*(n=167)*	*(n=147)*	
Number of jobs to fill				
None	25%	32%	33%	
1 or 2	39%	32%	31%	
3 to 5	22%	25%	21%	
More than 5	14%	11%	14%	
Average number of jobs to fill	3.7	2.7	3.0	
MEDIAN	2.0	2.0	2.0	
Total number (excluding DNK)	754	456	439	**1,649**
Projection including all respondents (233)	861	636	695	**2,192**
Ratio projection/no of employees in 2022	26%	20%	21%	
Don't know	*12%*	*28%*	*37%*	

Calculations of averages include zeros (no vacancies)

+ **2023 – Highest average number:**
- Accommodation, restaurants and tourism (9.9)
- 60 %+ semi-skilled or unskilled employees (5.2)
- Non-business owner (5.0)
- Environmental commitments (4.6)

+ **2024 – Highest average number:**
- Primary sector (4.0)
- Accommodation, restaurants and tourism 5.4)
- 60 %+ low-skilled or unskilled employees (3.3)
- Environmental commitments (3.3)

+ **2025 – Highest average number:**
- Accommodation, restaurants and tourism (5.2)
- Public and para-public sectors (4.1)
- Environmental commitments (3.6)

Q9. How many jobs do you think you will have to fill in each of the next three years? This includes new jobs created, including part-time and seasonal, along with replacements for employees who retire. Base: All respondents (n=233).

Number of jobs to fill (2/2)

Number of jobs to fill		ALL SECTORS	PRIMARY AND SECONDARY SECTORS	Primary sector	Secondary sector	TOTAL TERTIARY SECTOR	Retailing	Accommodation, restaurants and tourism	Public and para-public sectors	Tertiary sector, other services
	n excluding DNK: 2023/2024/2025	*204/167/147*	*42/36/34*	*17/14/14*	*25/22/20*	*162/131/113*	*44/31/28*	*27/24/22*	*28/21/17*	*63/55/46*
2023	Average number per respondent	3.7	2.8	3.5	**2.3**	3.9	3.4	**9.9**	4.5	**1.4**
	Total number (excluding DNK)	754	118	60	58	636	151	268	127	90
	Projection, all respondents	861	135	64	71	726	196	282	148	100
2024	Average number per respondent	2.7	2.8	**4.0**	2.0	2.7	3.1	**5.4**	2.3	**1.5**
	Total number (excluding DNK)	456	99	56	43	357	95	130	48	84
	Projection, all respondents	636	132	73	59	504	172	152	74	106
2025	Average number per respondent	3.0	3.1	3.9	2.6	2.9	3.3	**5.2**	**4.1**	**1.2**
	Total number (excluding DNK)	439	107	55	52	332	92	114	69	57
	Projection, all respondents	696	151	72	79	544	184	145	130	85
3 yrs	Total number (excluding DNK)	1 649	324	171	153	1 325	338	512	244	231
	Projection, all respondents	2 192	418	209	209	1 774	552	579	352	291

The jobs to be filled in the next three years – 1,649 for respondents able to answer and 2,192 with projections including the DNKs – have been broken down by major activity sector in the above table. The primary and secondary sectors represent 20% of these jobs and the tertiary sector 80%, further subdivided as follows: 25% for retailing, 26% for the accommodation, restaurant and tourism sector, 16% for the public and para-public sectors and 13% for other sectors.

Considering the average number of jobs to be filled by business, this number is significantly higher in the accommodation, restaurant and tourism sector (for the three years), in the primary sector (for 2024 only) and in the public and para-public sectors (for 2025 only). It is significantly lower in the other tertiary sector services (for the three years) and in the secondary sector (for 2023 only).

The significant variances shown on the preceding page show that the average number of jobs to be filled is significantly higher in companies with a majority of low-skilled or unskilled employees (for 2023-2024) and those that made commitments to reduce their environmental footprint (for the three years).

Q9. How many jobs do you think you will have to fill in each of the next three years? This includes new jobs created, including part-time and seasonal, along with replacements for employees who retireBase: All respondents (n=233).

Number of jobs to be filled based on job qualification level

Of the companies that have vacancies to be filled in 2023, 2024 or 2025, the proportion of highly qualified jobs will vary between 10% and 11%, depending on the years, skilled or semi-skilled jobs will vary between 34% and 35% and low-skilled or unskilled jobs between 54% and 55%. There is therefore no difference from one year to the next. As for the job qualification level in 2022, little difference was noted, save for a slight rise in the number of low-skilled or unskilled jobs.

The proportion of highly skilled jobs exceeds the average in the public and para-public sectors, in the other services in the tertiary sector, companies with 15 or more employees and also those with a majority of women where the person responding to the survey was not the owner. On the other end, there were more low-skilled or unskilled jobs in the primary sector, in accommodation, restaurants and tourism, retailing and in companies employing equal numbers of men and women.

	Current jobs 2022	Vacancies to fill (respondents that have some)		
		2023	2024	2025
	(n=233)	*(n=153)*	*(n=114)*	*(n=147)*
Distribution of vacancies to fill based on qualification level				
Highly skilled jobs	12.0%	10.7%	11.4%	10.4%
Skilled or semi-skilled jobs	35.2%	35.0%	34.3%	34.9%
Low-skilled or unskilled jobs	52.8%	54.3%	54.2%	54.7%

Highly qualified jobs: generally require university training: managers, management level employees and professionals.
Skilled or semi-skilled jobs: require technical training at the college level (technical DEC) or high school-level vocational (DVS).
Low-skilled or unskilled jobs: require a general high school diploma or no diploma.

\+ **HIGHLY QUALIFIED – highest proportion:**
- Public and para-public sectors (2023, 2024, 2025)
- Tertiary sector, other (2023, 2024, 2025)
- 15 employees and over (2023, 2025)
- >60 % female employees (2023, 2024, 2025)
- Non-business owner (2023, 2024, 2025)

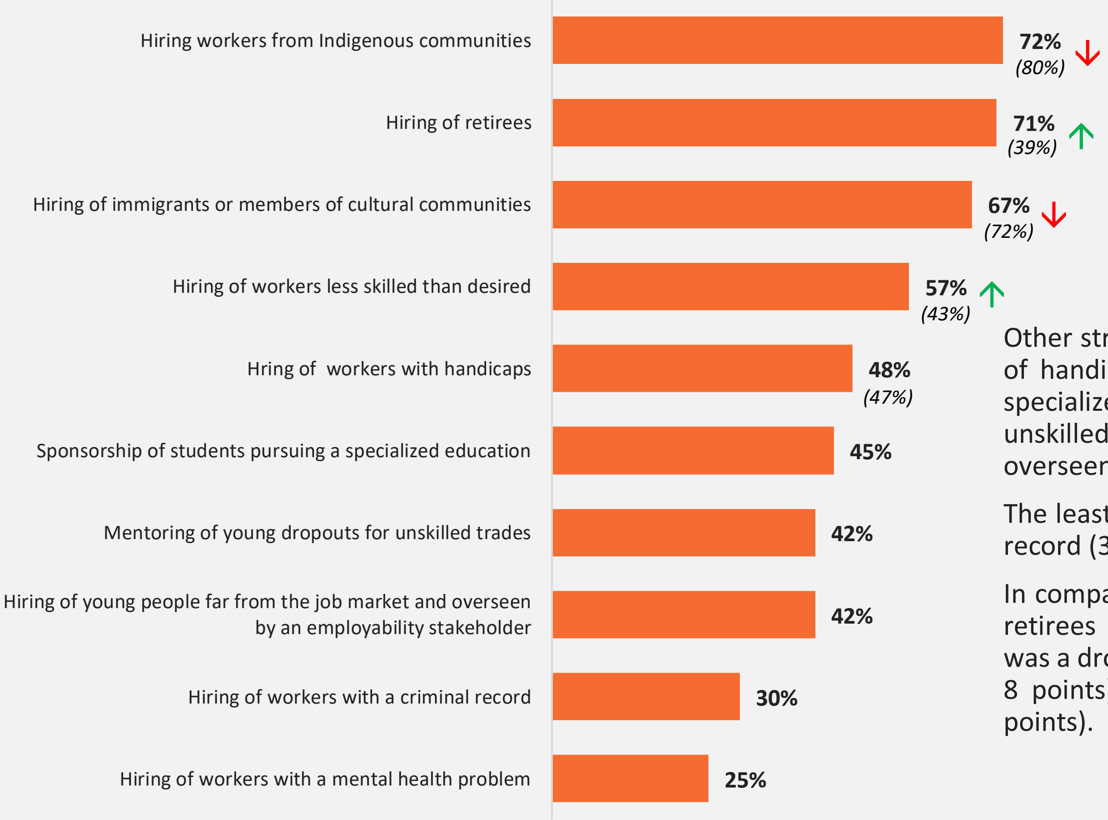
\+ **SKILLED/SEMI-SKILLED – highest proportion:**
- Secondary sector (2023, 2024, 2025)
- Public and para-public sectors (2023, 2024, 2025)
- Tertiary sector, other (2023, 2024, 2025)
- >60 % male employees (2023, 2024)

\+ **LOW-SKILLED/SKILLED – higher proportion:**
- Primary sector (2024, 2025)
- Accommodation, restaurants and tourism (2023, 2024, 2025)
- Retail (2023, 2024, 2025)
- Equal numbers of men and women (2023, 2024, 2025)

Q10. Please distribute the number of jobs to be filled over the next three years according to the job classification level. Base: Respondents answering Q9 and having vacancies to be filled (n variable depending on the years).

4. Recruiting

Recruiting in a context of labour shortages (1/2)



(The figures in brackets were taken from the 2018 survey.)

In a context of labour shortages, a rather sizeable number of respondents have either turned to or would be willing to turn to workers from Indigenous communities (72%), retirees (71%) and immigrants or members of cultural communities (67%). Fewer respondents have hired or would be willing to hire workers less skilled than desired (57%)

Other strategies were mentioned quite often (more than 40%): hiring of handicapped workers (48%), sponsorship of students pursuing a specialized education (45%), mentoring of young dropouts for unskilled trades (42%) and young people far from the job market and overseen by an employability stakeholder (42%).

The least often cited strategies are as follows: workers with a criminal record (30) and those with a mental health problem (25%).

In comparison with the 2018 survey, there was a spike in the hires of retirees (+32%) and workers less skilled than desired (+14%). There was a drop in the numbers of workers from Indigenous communities (-8 points) and immigrants or members of cultural communities (-5 points).

Q11. Over the next three years, and given the changes brought on by labour shortages, do you plan on resorting to the following actions?
Base : All respondents (n=233).

Recruiting in a context of labour shortages (2/2)

An analysis of the significant variances for each of the ten strategies that respondents either turned to or intend to turn to in order to deal with the labour shortage shows that certain segments are proportionately more inclined to go with several strategies:

- Companies with 15 employees and over (positive variances for 9 of 10 strategies, except for workers with a criminal record).
- The accommodation, restaurant and tourism sector (9 out of 10, with the exception of handicapped workers). This may be explained by the fact that this sector was very severely affected by the pandemic and that several workers have left this field. As a result, it is more affected by the labour shortage and thus more open to various recruiting strategies.
- The public and para-public sectors (3 out of 10: the retiree, less qualified and mental health problem categories).
- Companies with a large proportion of workers under 25 (4 out of 10).

Recruiting actions	Statistically significant variables +
Hiring of workers from Indigenous communities	- Accommodation, restaurants and tourism (89%) - 15 employees and over (83%) - 25%+ employees under 25 (84%) - Environmental commitments (79%)
Hiring of retirees	- Accommodation, restaurants and tourism (86%) - Public and para-public sectors (81%) - 15 employees and over (86%)
Hiring of immigrants and members of cultural communities	- Accommodation, restaurants and tourism (86%) - 15 employees and over (81%)
Hiring of workers less qualified than desired	- Accommodation, restaurants and tourism (82%) - Public and para-public sectors (66%) - 15 employees and over (74%) - 25%+ employees under 25 (67%) - Environmental commitments (63%)
Hiring of handicapped workers	- 15 employees and over (60%) - 25%+ employees under 25 (55%)

Recruiting actions	Statistically significant variables +
Sponsoring of students pursuing a specialized education	- Accommodation, restaurants and tourism (64%) - 15 employees and over (57%)
Mentoring of young dropouts for unskilled trades	- Accommodation, restaurants and tourism (64%) - 15 employees and over (54%) - As many men as women (55%) - 25%+ employees under 25 (55%) - 60 %+ low-skilled or unskilled employees (54%)
Hiring of young persons some distance away from the job market	- Accommodation, restaurants and tourism (61%) - 15 employees and over (53%)
Hiring of workers with a criminal record	- Secondary sector (47%) - Accommodation, restaurants and tourism (50%)
Hiring of workers with a mental health problem	- Accommodation, restaurants and tourism (43%) - Public and para-public sectors (38%) - 15 employees and over (39%) - >60 % female employees (37%) - 25%+ employees under 25 (35%)

Q11. Over the next three years, and given the changes brought on by labour shortages, do you plan on resorting to the following actions?

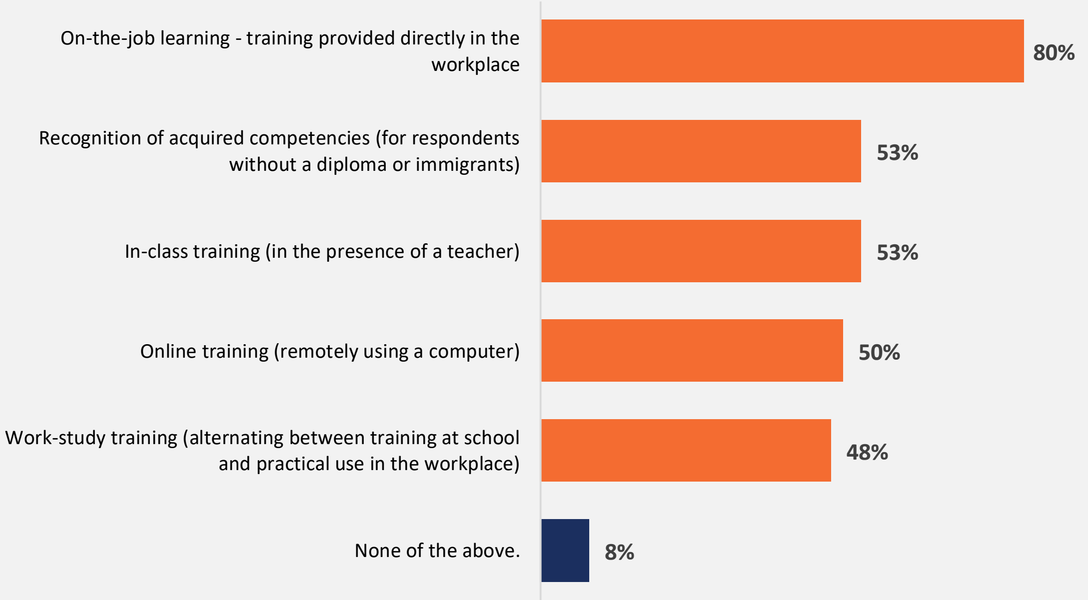
Base : All respondents (n=233)

5. Training

Preferred training approaches

According to the respondents, the five training approaches submitted to them reportedly meet or relatively meet their needs and their employees' needs. On-the-job learning is by far the most suitable approach, having been mentioned by 80% (without any variance par respondent segment).

The other four approaches were cited either close to or slightly more than by half of the respondents. The recognition of acquired competencies (53%) was mentioned more often by the secondary sector. In-class learning (53%), online training (50%) and a work-study program (48%) were proportionately mentioned more often by the public and para-public sectors and by companies with 15 employees and over.



On-the-job training – most often mentioned: No variance

RECOGNITION OF ACQUIRED COMPETENCIES: most mentioned
- Secondary sector (73%)

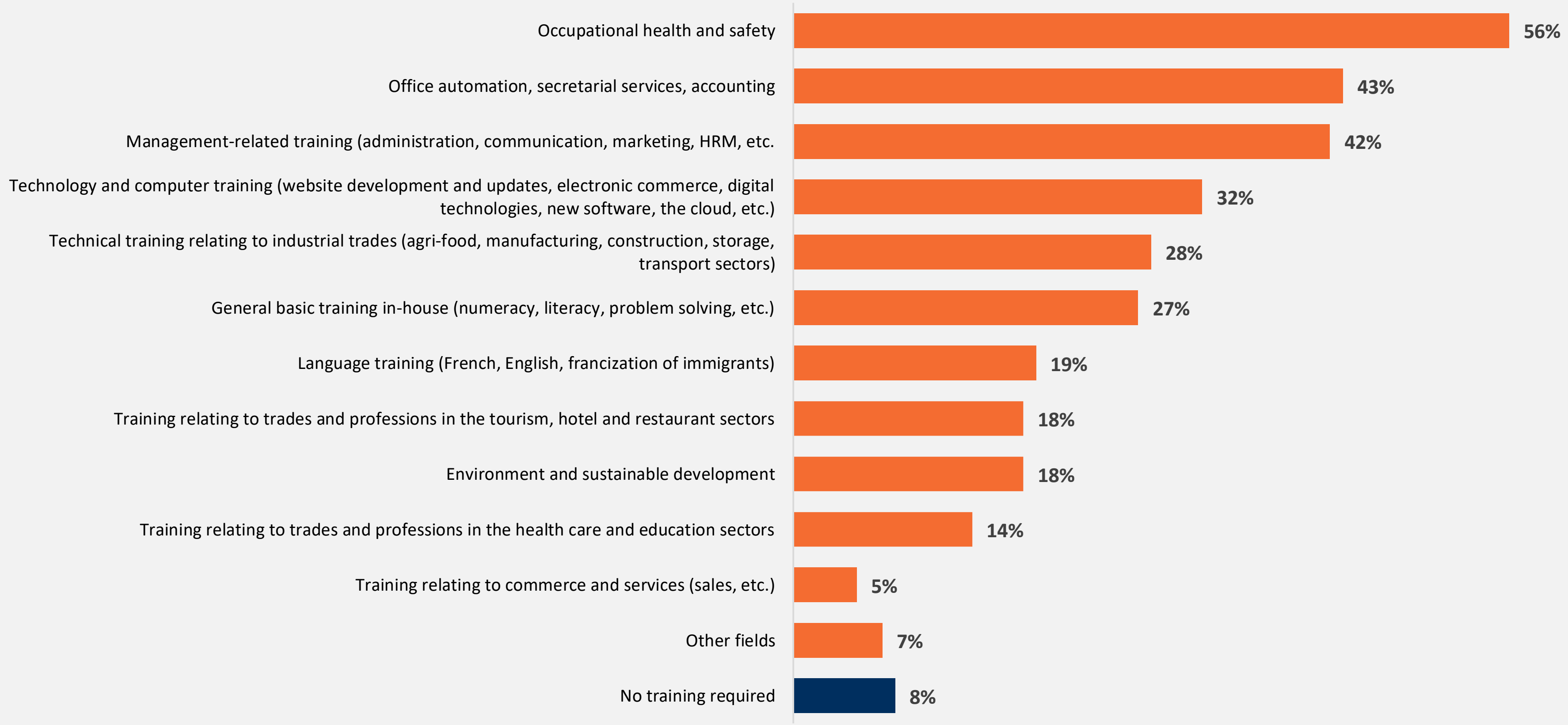
IN-CLASS TRAINING – most mentioned:
- Public and para-public sector s(75%)
- 15 employees and over (64%)
- 60 %+ highly skilled or semi-skilled employees (64%)

ONLINE TRAINING – most mentioned:
- Public and para-public sector s(78%)
- 15 employees and over (63%)
- As many highly skilled as low-skilled/unskilled (66%)

WORK-STUDY PROGRAM – most mentioned:
- Public and para-public sectors (66%)
- 15 employees and over (64%)

Q12. Which training approaches are best suited to your company? *(Several possible options)*
Base : All respondents (n=233).

Training requirements (1/2)



Q13. Which fields would it be beneficial for your employees to receive training in? *(Several possible options)*
Base : All respondents (n=233).

Training requirements (2/2)

The companies surveyed have multiple training requirements. However, three main training areas cited most often were occupational health and safety (56%), office automation, secretarial services, accounting (43%) and management (administration, communication, marketing, human resources management, etc.) (42%).

Another three training areas were cited between a quarter and a third of respondents – technology and computers (32%), technical training relating to industrial trades (e.g., agri-food, manufacturing, construction, storage, transportation sectors) (28%) and basic general training in-house (numeracy, literacy, problem solving, etc.). Only 8% said they did not have any training requirements.

Statistically significant variances

The requirements for certain training areas relate directly to the activity sector: industrial trades (primary and secondary), health and education (public and para-public sectors), tourism, hotels and restaurants, commerce and services. Some training, though cross-training in and of itself, affects some sectors even more: occupational health and safety (secondary sector), computer technologies, management and office automation, secretarial services and accounting (public and para-public sectors), basic general training (retailing).

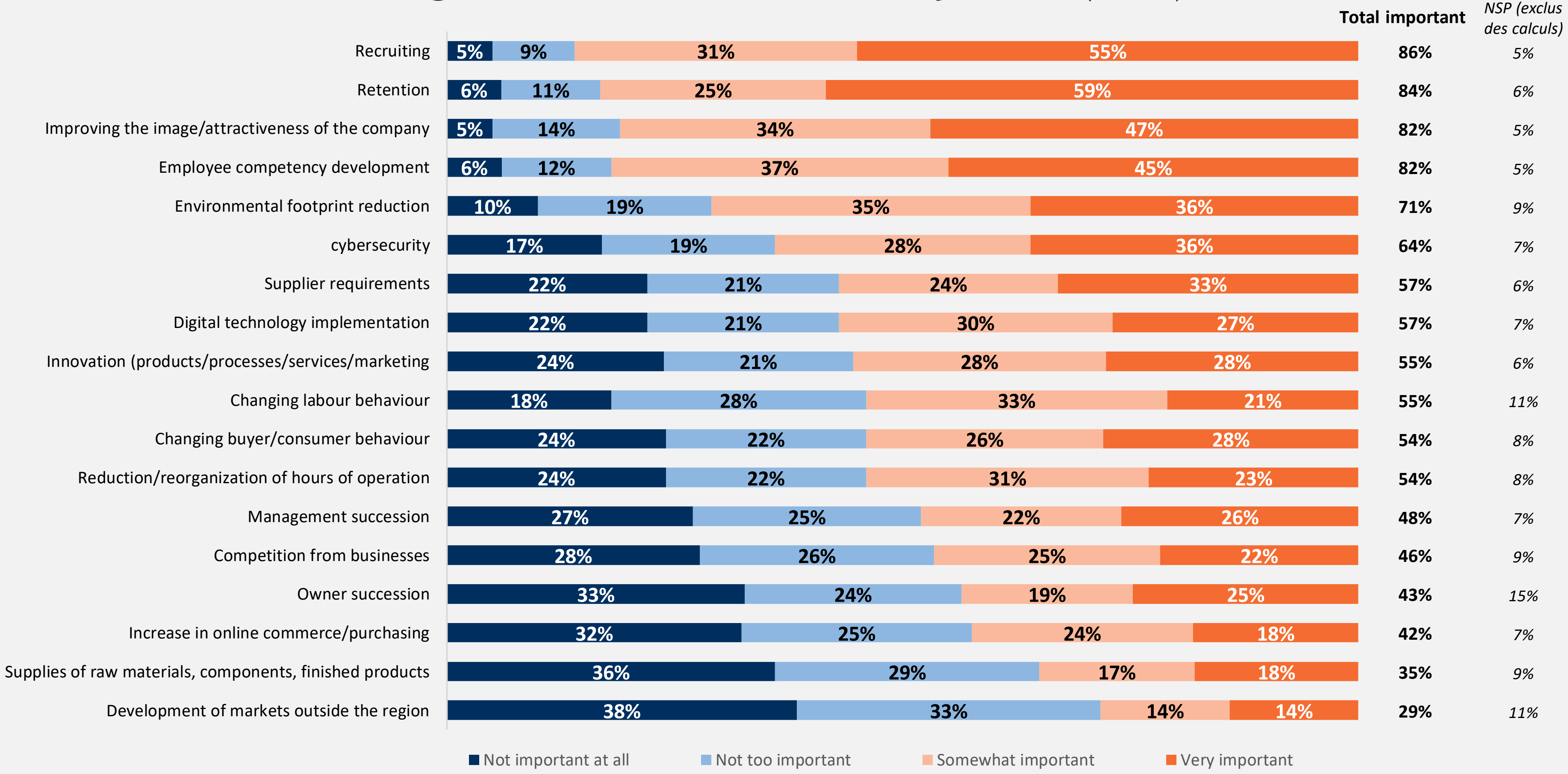
Training requirements	Statistically significant variances +
Occupational health and safety	- Secondary sector (73%) - 15 employees and over (67%) - Environmental commitments (62%)
Office automation, secretarial services, accounting	- Public and para-public sectors (59%) - 15 employees and over (53%)
Management	- Public and para-public sectors (66%) - 15 employees and over (63%)
Technology and computers	- Public and para-public sectors (44%)
Industrial trades	- Primary sector (61%) - Secondary sector (67%) - >60 % male employees (50%)
Basic general training in-house	- Retailing (43%)

Training requirements	Statistically significant variances +
Language training	- Accommodation, restaurants and tourism (36%)
Tourism, hotels and restaurants	- Accommodation, restaurants and tourism (82%) - As many male employees as female (35%) - 60 %+ low-skilled or unskilled employees (24%)
Environment and sustainable development	- Accommodation, restaurants and tourism (36%)
Health and education	- Public and para-public sectors (50%) - 15 employees and over (29%) - >60 % female employees (37%) - 60 %+ highly or semi-skilled employees (24%)
Commerce and services	- Retailing (11%)
No training needed	- 60 %+ low-skilled or unskilled employees (13%) - No environmental commitments (15%)

Q13. Which fields would it be beneficial for your employees to receive training in? *(Several possible options)*
Base : All respondents (n=233).

6. Issues and challenges

Issues and challenges in the next three years (1/4)



BIP

Q14. In the next three years, which of the following issues and challenges will be very, somewhat, not too important or not important at all for your business?
Base: All respondents (n = 233).

Issues and challenges in the next three years (2/4)

Eighteen issues and challenges were submitted to respondents, who were asked to assess their importance over the next three years.

- Four issues and challenges were deemed important (*very important* and *rather important* combined) and received a rating of more than 80%: recruiting of labour (86%), employee retention (84%), improvement of the image and attractiveness of the business (82%) and employee competency development (82%).
- Two more issues were rated important by two-thirds (give or take): reduction of the environmental footprint (71%) and cybersecurity (64%).
- Six issues received a similar importance rating around 55%: supplier requirements (57%), implementation of digital technologies (57%), product innovation, processes, services or marketing (55%), changing worker behaviours (55%), changing buyer or consumer behaviours (54%) and reduction or reorganization of hours of operation or opening time due to a lack of available staff (54%).
- Four issues were deemed important by a strong minority of respondents (more than 40%): manager succession (48%), competition from businesses (46%), owner succession (43%) and increase in online commerce or purchasing (42%).
- Only two issues are important to a third or fewer respondents: raw material supplies, components or finished products (35%) and development of markets outside the region (29%).

Q14. In the next three years, which of the following issues and challenges will be very, somewhat, not too important or not important at all for your business?
Base: All respondents (n = 233).

Issues and challenges in the next three years (3/4)

Issues and challenges	Total of very and rather important Statistically significant variances +
Recruiting	- 15 employees and over (97%)
employee retention	- Public and para-public sectors (97%) - 15 employees and over (93%) - Environmental commitments (88%)
Improvement of the image or attractiveness of the business	- Environmental commitments (86%)
Employee competency development	- Public and para-public sectors (100%) - 15 employees and over (93%) - Environmental commitments (88%)
Environmental footprint reduction	- Environmental commitments (83%)
Cybersecurity	- Environmental commitments (69%)
Supplier requirements	- Primary sector (67%) - Secondary sector (77%) - Retailing (70%) - >60 % male employees (67%) - 60 %+ low-skilled or unskilled employees(66%)
Implementation of digital technologies in some management processes	- Retailing (67%)
Innovation of products, processes, services or marketing	- Primary sector (72%) - Secondary sector (73%)

Issues and challenges	Total of very and rather important Statistically significant variances +
Changing employee behaviours	- Primary sector (67%) - Public and para-public sectors (65%) - 15 employees and over (65%)
Changing buyer or consumer behaviour	- Accommodation, restaurants and tourism (75%) - Retailing (76%)
Reduction or reorganization of hours of operation or business hours due to staff shortages	- Accommodation, restaurants and tourism (63%)
Management succession	- 15 employees and over (68%) - Non-business owner(58%)
Competition from businesses	- Retailing (68%) - 60 %+ low-skilled or unskilled employees(54%)
Owner succession	- Primary sector (67%) - Business owner (52%)
Increase of online commerce or purchasing	- Retailing (67%) - 60 %+ low-skilled or unskilled employees(49%)
Supplies of raw materials, components or finished products	- Secondary sector (76%)
Development of markets outside the region	- Primary sector (41%) - Accommodation, restaurants and tourism (44%)

Q14. In the next three years, which of the following issues and challenges will be very, somewhat, not too important or not important at all for your business?
Base: All respondents (n = 233).

Issues and challenges in the next three years (4/4)

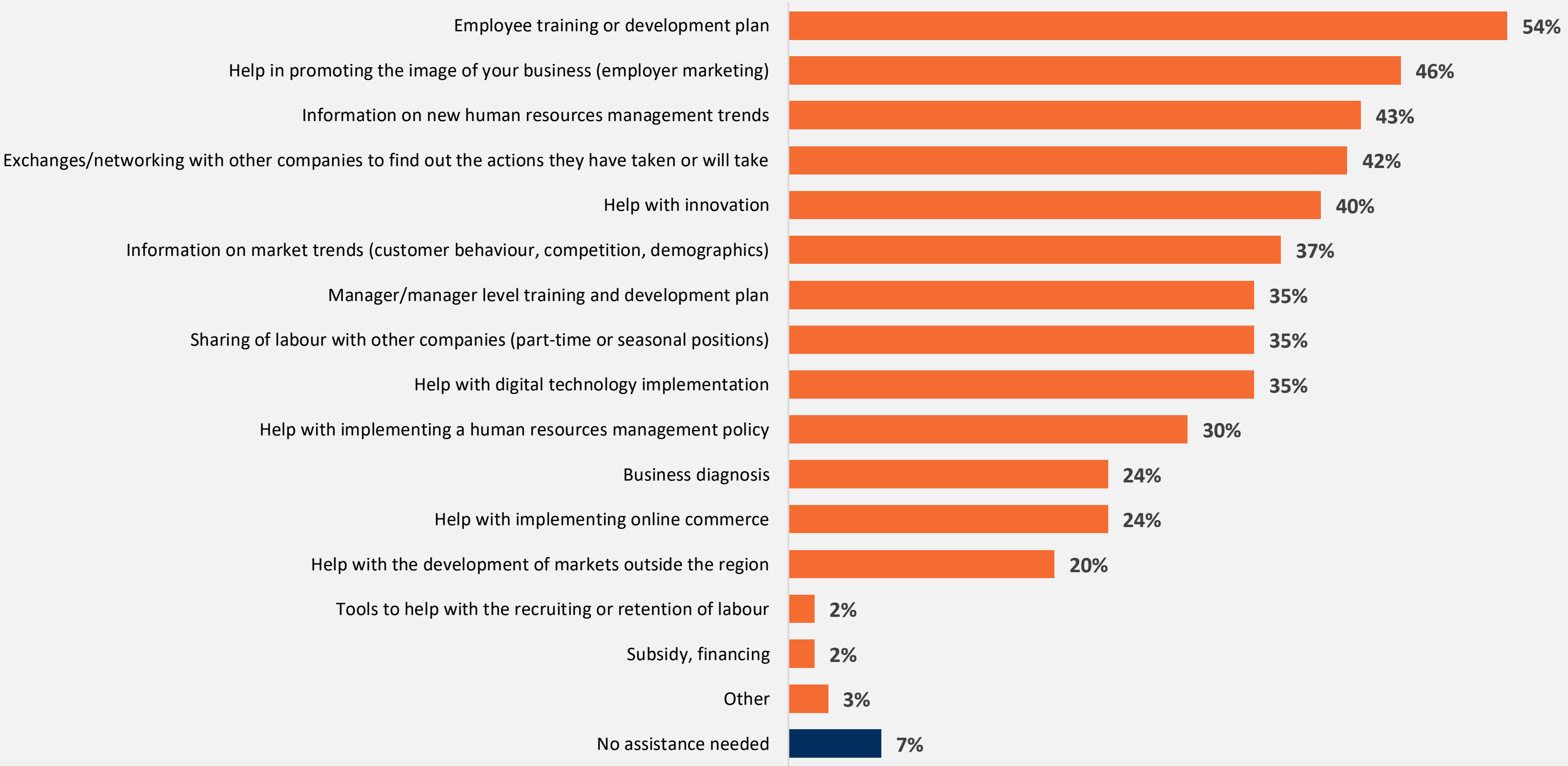
Statistically significant variances (table on the preceding page)

An analysis of significant variances highlights some segments of respondents are proportionately more inclined to consider some issues and challenges as important:

- Larger companies, i.e., 15 employees and over (positive variance on 5 issues): recruiting, employee retention, employee competency development, changing employee behaviour, management succession
- Retailing (5 issues): supplier requirements, digital technology implementation, changing buyer or consumer behaviour, competition from businesses and increase in online commerce or purchasing.
- Primary sector (5 issues): supplier requirements, innovation, changing buyer or consumer behaviour, owner succession, development of markets outside the region
- Secondary sector (3 issues): supplier requirements, innovation, supply of raw materials, components or finished products.
- The accommodation, restaurants and tourism (3 issues): changing buyer or consumer behaviour, reduction or reorganization of hours of operation or opening times, development of markets outside the region.
- Public and para-public sectors (3 issues): employee retention, employee competency development, changing buyer or consumer behaviour.
- Companies that made commitments to reduce their environmental footprint (5 issues): employee retention, improvement of the image/attractiveness of the company, employee competency development, reduction of the environmental footprint, cybersecurity.

Q14. In the next three years, which of the following issues and challenges will be very, somewhat, not too important or not important at all for your business?
Base: All respondents (n = 233).

Needs or help to deal with the issues (1/3)



Q15. What major types of needs, assistance or consulting support would be necessary to help your business deal with these issues? (*Several possible options*)
Base : All respondents (n=233).

Needs or help to deal with the issues (2/3)

The respondents cited several types of assistance or consulting support needs to deal with the issues mentioned previously. The main ones appear hereunder.

- The most important was an employee training or development plan mentioned by 54%.
- Four respondents in ten mentioned another four: help with promoting the image of the business (employer marketing) (46%), information on new human resources management trends (43%), exchanges or networking with other companies to find out what actions they have taken (42%) and help with innovation (40%).
- One-third or close to a third referred to five needs: information on market trends (customer behaviour, competition, demographics, lifestyles, etc.) (37%), a manager/managerial level training or development plan (35%), sharing of labour with other companies (part-time or seasonal positions) (35%), and help with digital technology implementation (35%) and with the implementation of a human resources management policy (30%).

Statistically significant variances (table on the following page)

An analysis of the significant variances does shed light on certain segments of respondents, particularly some activity sectors that are proportionately more inclined to express certain needs or forms of assistance:

- The accommodation, restaurant and tourism sector (positive variance for 7 needs/aid): help promoting the image of the business, exchanges/networking with other companies to find out what action they have taken, help with innovation, information on market trends, manager/managerial level training or development plan, sharing of labour with other companies, help with the implementation of a human resources management policy.
- The public and para-public sectors (3 needs/aid): employee training or development plan, information on new human resources management trends, managerial level training or development plan.
- Retailing (2 needs/aid): information on market trends, help with implementing online commerce.
- The primary sector (2 needs/aid): help with innovation, help with developing markets outside the region.
- Companies with 15 employees and over (3 needs/aid): employee training or development plan, information on new human resources management trends, help with the implementation of a human resources management policy.

Q15. What major types of needs, assistance or consulting support would be necessary to help your business deal with these issues? (*Several possible options*)
Base : All respondents (n=233).

Needs or help to deal with the issues (3/3)

Needs, assistance or consulting support	Statistically significant variances +
Employee training or development plan	- Public and para-public sectors (66%) - 15 employees and over (67%)
Help promoting the image of the business (employer marketing)	- Accommodation, restaurants and tourism (64%)
Information on new human resources management trends	- Public and para-public sectors (69%) - 15 employees and over (66%) - Environmental commitments (49%)
Exchanges/networking with other businesses to find out what action they have taken	- Accommodation, restaurants and tourism (54%) - Environmental commitments (49%)
Help with innovation	- Primary sector (50%) - Secondary sector (52%) - Accommodation, restaurants and tourism (50%)
Information on market trends (customer behaviour, competition, demographics, lifestyles, etc.)	- Accommodation, restaurants and tourism (57%) - Retailing (54%)

Needs, assistance or consulting support	Statistically significant variances +
Management/managerial level training and development plan	- Accommodation, restaurants and tourism (43%) - Public and para-public sectors (47%) - 25%+ employees under 25 (45%)
Sharing of labour with other businesses (part-time or seasonal positions)	- Accommodation, restaurants and tourism (61%)
Help with the implementation of digital technologies	- No variance
Help implementing a human resources management policy	- Accommodation, restaurants and tourism (39%) - Public and para-public sectors (44%) - 15 employees and over (41%)
Business diagnosis	- No variance
Help implementing online commerce	- Retailing (39%)
Help developing markets outside the region	- Primary sector (28%)

Q15. What major types of needs, assistance or consulting support would be necessary to help your business deal with these issues? (*Several possible options*)
Base : All respondents (n=233).

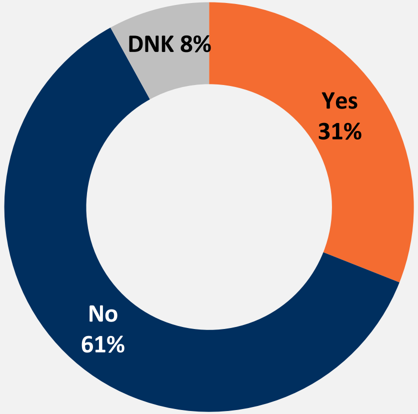
7. Cybersecurity

Knowledge of Law 25

Slightly fewer than one-third of respondents are aware of Quebec's Law 25 that will come into force in September 2023 to modernize legislative provisions as regards the protection of personal information. This will require businesses to come up with a policy on the protection of personal information and cybersecurity.

Companies in the public or para-public sectors with 15 or more employees or that have committed to reducing their environmental footprint are among the segments more aware of the coming of Law 25 than the average. On the other end of the scale, businesses in the primary and secondary sectors and those that have not committed to reducing their environmental footprint are among the segments less aware of Law 25 than the average.

Awareness of the enactment of Law 25 in September 2023.



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YES – highest:
- Public and para-public sectors (56%)
- 15 employees and over (44%)
- Non-business owner (49%)
- Environmental commitments (38%)

–

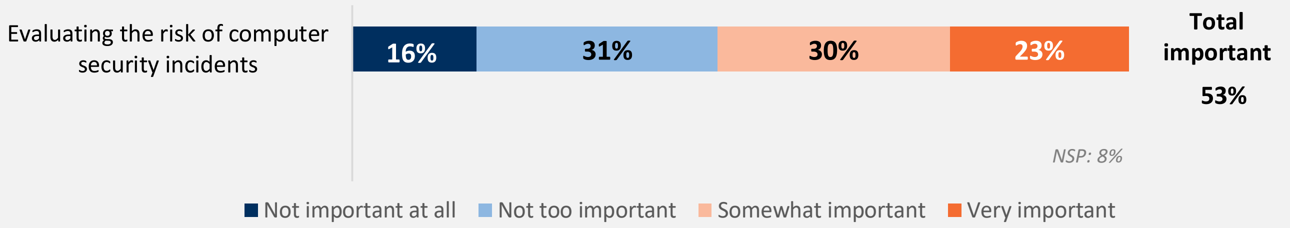
YES – lowest:
- Primary sector (6%)
- Secondary sector (13%)
- Business owner (20%)
- No environmental commitments (18%)

Q16. Are you aware that Law 25 will come into force in September 2023 to modernize legislative provisions as regards the protection of personal information? This will require that businesses will have to come up with a policy on the protection of personal information and cybersecurity.
Base: All respondents (n = 233).

Evaluating the risk of computer security incidents

Slightly more than half of respondents (53%) assess the risk of their business being the victim of computer security incidents (intrusions, hacking, ransom, etc.) as very high or rather high. Note that the former (23%) is lower than the latter (30%).

Few significant variances were noted. The risk is perceived as higher than average by respondents in the public and para-public sector and less than the average by respondents in the primary sector.



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TOTAL IMPORTANT – highest:
- Public and para-public sectors (76%)

–

TOTAL IMPORTANT – lowest:
- Primary sector (39%)

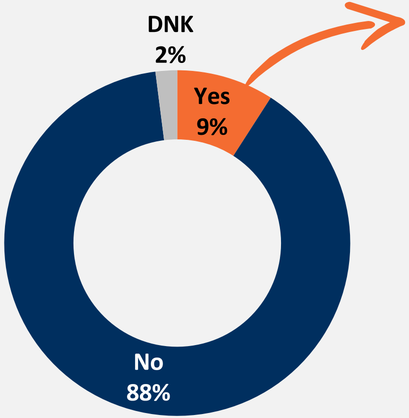
Q17. How would you evaluate the risk of your business being the victim of computer security incidents, e.g., intrusions, hacking, ransom, etc.? Base: Respondents who voted (n = 233).

Presence of computer security incidents and impacts

A mere 9% of respondents claim they fell victim to computer security incidents in the last three years, and none in the primary sector did.

For those who were victimized, the main impacts involve the theft of confidential data (32%) and the shutdown of operations (27%). Other effects such as lost income, infection, loss or restructuring of software affected close to one respondent in five.

Affected by computer security incidents (intrusions, hacking, ransom, etc.)



YES - highest:
- No variance

YES - lowest:
- Primary sector (0%)

Main impacts of these incidents

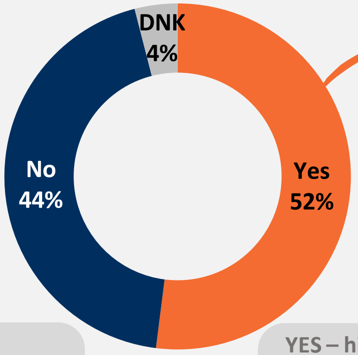
Q18. In the past three years, has your business been victimized by computer security incidents (intrusions, hacking, ransom, etc.)? Base: All respondents (n = 233).
Q19. What were the main impacts of these incidents? *(Several possible options)* Base: Respondents answering yes to Q18 (n = 22).

Measures to strengthen information and management systems (1/2)

More than half of the respondents (52%) have implemented measures to strengthen the security of their information and management systems in the past three years. This percentage is higher in the retailing, public and para-public sectors and in companies with 15 or more employees that have made commitments to reduce their environmental footprint. The proportion is lower than average, particularly in the primary and secondary sectors and in microbusinesses (fewer than 5 employees).

Two-thirds of those who have taken these measures (65%) plan on further strengthening them in the next year, especially businesses in the public and para-public sectors and companies with 15 or more employees. Only 20% of those that have not taken any measures plan on implementing them in the next year.

Have you implemented measures to strengthen your information and management systems?



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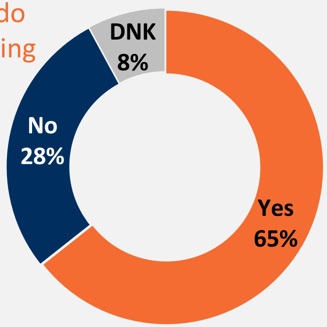
YES - lowest:
- Primary sector (17%)
- Secondary sector (37%)
- 1 to 4 employees (33%)
- Business owner (41%)
- No environmental commitments (42%)

+

YES – highest:
- Retailing (64%)
- Public and para-public sectors (69%)
- 15 employees and over (73%)
- Non-business owner (69%)
- Environmental commitments (57%)

Those answering yes: do you plan on strengthening these measures?



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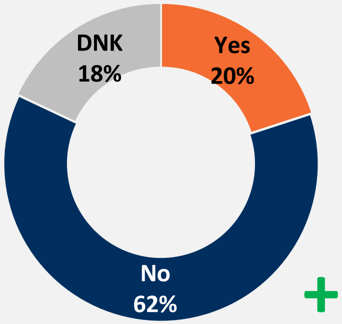
YES – highest:
- Public and para. sectors (77%)
- 15 employees and over (76%)

Those answering no or DNK: do you plan on bringing such measures?



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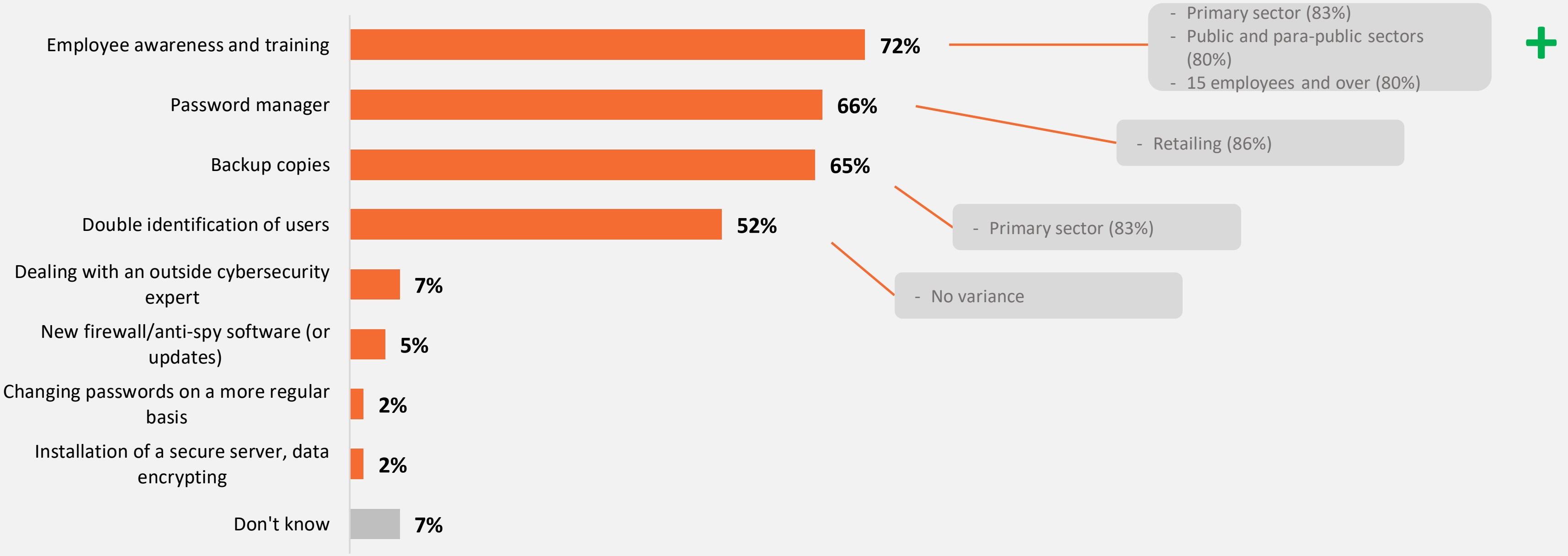
YES - highest:
- Public and para-public sectors (30%)

Q20. In the past three years, has your company implemented measures to strengthen the security of its information and management systems? Base: All respondents (n = 233).
Q21A. In the next year, does your company plan on implementing measures to strengthen the security of its information and management systems?
Base: Respondents who did not answer yes to Q20 (n = 113).
Q21B. In the next year, does your company plan on implementing measures to further strengthen the security of its information and management systems?
Base: Respondents who answered yes to Q20 (n = 120).

Measures to strengthen information and management systems (2/2)

Among the companies that have implemented or plan to implement measures to strengthen the security of their information and management systems, three measures stand out in particular, as they affect at least two-thirds of respondents: employee awareness and training (72%, especially in the primary and the public and para-public sectors), a password manager (66%, especially in retailing) and a backup copies (65%, especially in the primary sector). More than half the respondents mentioned double identification of users.



Q22. What measures did you implement or plan on implementing to strengthen the security of your information and management systems? *(Several possible options)*
Base: Respondents answering yes to Q21A or Q21B (n = 101).

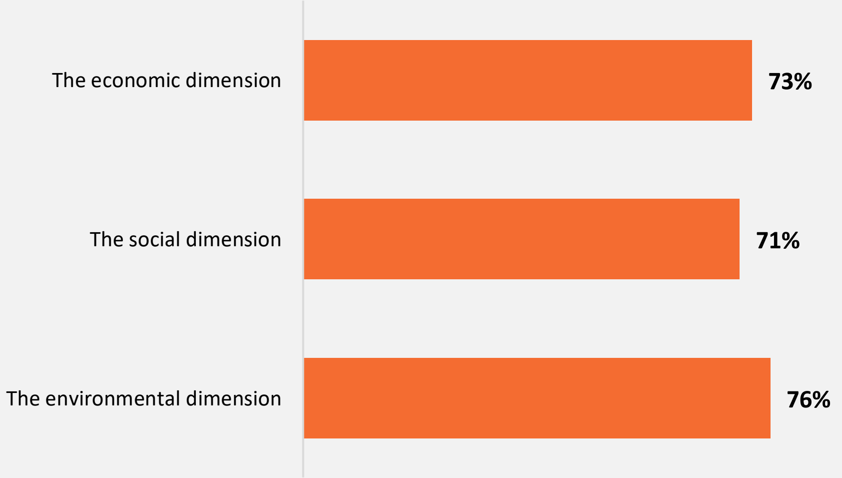
8. Sustainable development and environmental management

Understanding of the sustainable development concept (1/2)

The sustainable development concept, for the most part, is well understood by respondents, three-quarters of whom believe that the economic dimension is included in the concept (73%). The same holds for the social dimension (71%) and the environmental dimension (76%). As a result, there is no notable difference in the result between the three dimensions.

For each of the three dimensions, four segments showed an above-average degree of understanding: accommodation, restaurants and tourism; and businesses with 15 employees and over which also made commitments to reduce their environmental footprint.

Sustainable development includes:



ECONOMIC DIMENSION – highest:
- Accommodation, restaurants and tourism (86%)
- 15 employees and over (87%)
- Environmental commitments (82%)

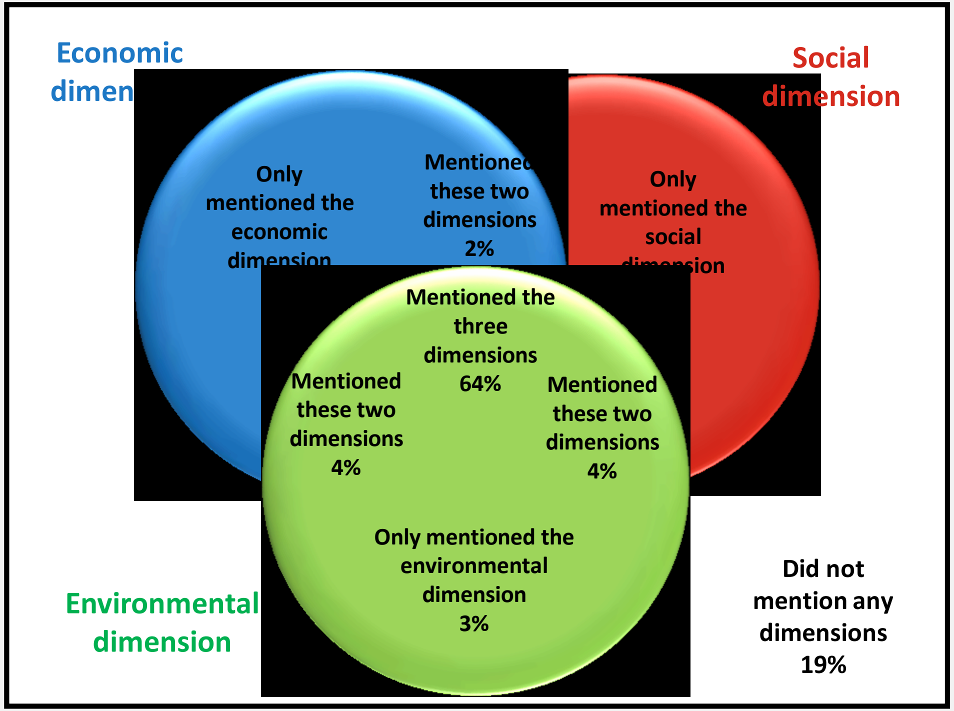
SOCIAL DIMENSION – highest:
- Accommodation, restaurants and tourism (82%)
- 15 employees and over (84%)
- Environmental commitments (79%)

ENVIRONMENTAL DIMENSION – highest:
- Accommodation, restaurants and tourism (89%)
- 15 employees and over (91%)
- Environmental commitments (85%)

Q23. In your opinion, which of the following dimensions are included in the sustainable development concept?
Base: All respondents (n = 233).

Understanding of the sustainable development concept (2/2)

The results for each of the dimensions (economic, social and environmental) were crossed over, which confirms a generally good understanding of what is meant by sustainable development: close to two-thirds of respondents (64%) believe that the three dimensions are included in the sustainable development concept (where the three bubbles on the graph intersect).



A total of 10 respondents believe that two of the three dimensions are part of sustainable development (where two of the three bubbles of the graph intersect). Very few (5%) believe that only one of the three dimensions is included in the sustainable development concept (portions of the bubbles where there is no intersection). Moreover, 19% have no understanding of sustainable development, because in their view, none of the three dimensions are a part of it.

Businesses in the accommodation, restaurant and tourism sector and those with at least 15 employees which have also made commitments to reduce their environmental footprint have the best understanding of sustainable development.

\+ **MENTIONED THE THREE DIMENSIONS – highest:**
- Accommodation, restaurants and tourism (79%)
- 15 employees and over (79%)
- Environmental commitments (73%)

\+ **DID NOT MENTION ANY DIMENSIONS – highest:**
- 1 to 4 employees (27%)
- >60 % male employees (25%)
- No environmental commitments (33%)

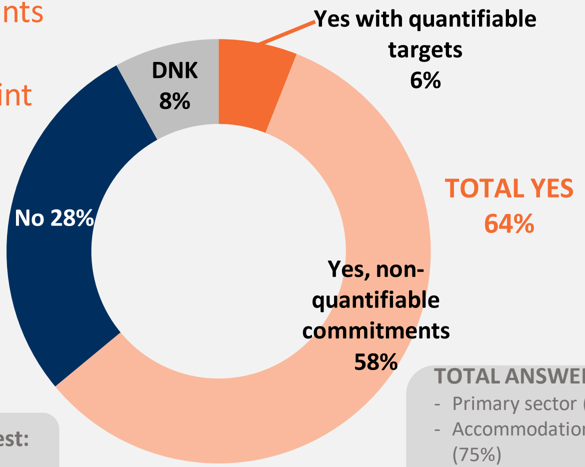
Q23. In your opinion, are the following dimensions included in the sustainable development concept?
Base: All respondents (n = 233).

Environmental footprint reduction commitments

In the past three years, close to two-thirds of respondents (64%) have made commitments to reduce their environmental footprint. However, only 6% have committed to quantifiable targets, which is much lower than the remaining 58% that have not. These commitments are more prevalent in the primary sector, the accommodation, restaurant and tourism sector, the public and para-public sector and in business with at least 15 employees. The lowest figure is in the retail sector.

Slightly more than one-third (36%) of companies that have not made any environmental commitments intend to do so in the next two years. And they are especially found in the same segments as those which have already made commitments (public and para-public sectors, companies with at least 15 employees that are aware of Law 25.

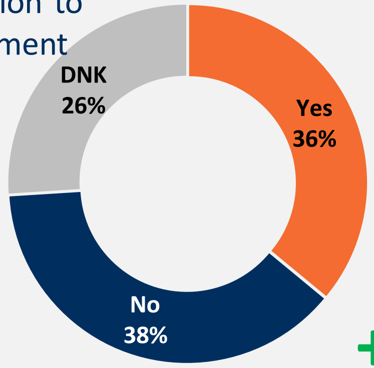
Have made commitments to reduce their environmental footprint



TOTAL ANSWERING YES - lowest:
- Retailing (52%)
- Business owner (58%)

TOTAL ANSWERING YES - highest
- Primary sector (78%)
- Accommodation, restaurants and tourism (75%)
- Public and para-public sectors (75%)
- 15 employees and over (77%)
- Non-business owner (74%)

If no or DNK, intention to make this commitment



YES - highest:
- Public and para-public sectors (63%)
- 15 employees and over (56%)

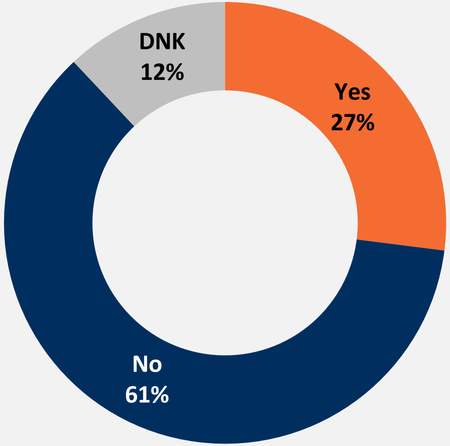
Q24. In the past three years, has your business made any environmental footprint reduction commitments? Base: All respondents (n = 233).
Q25. In the next two years, does your business intend to commit to reducing its environmental footprint?
Base: Respondents not answering yes to Q24 (n = 84).

Customer expectations regarding environmental footprint reduction

Just over one-quarter of respondents indicated that their customers are demanding that they take action to reduce their environmental footprint.

This is most often noted in the primary sector, the accommodation, restaurant and tourism sector and in businesses that made commitments to reduce their environmental footprint. Companies in the secondary sector and in other services in the tertiary sector ranked below average on this dimension.

Customer demands for commitments to reduce a company's environmental footprint



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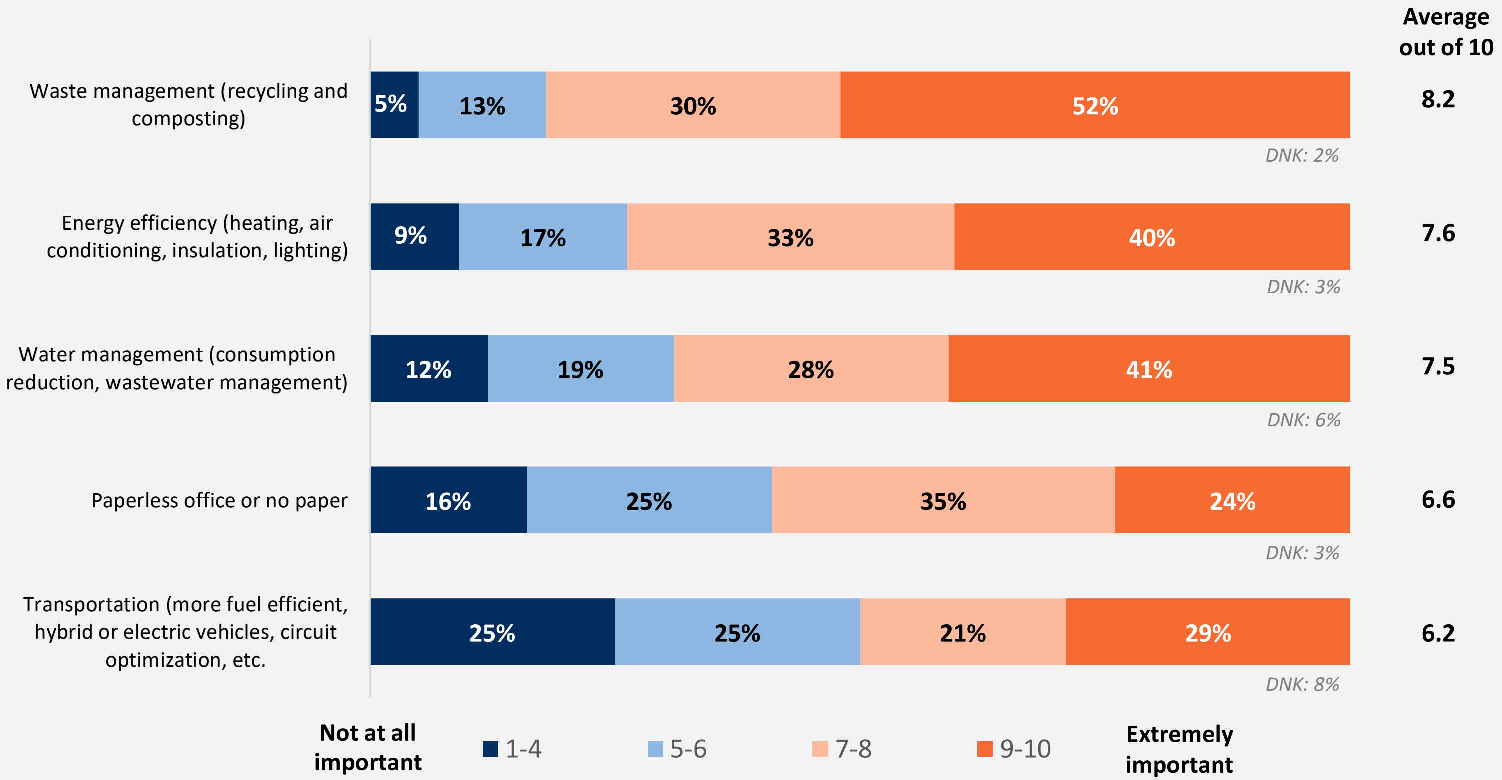
YES – highest:
- Primary sector (44%)
- Accommodation, restaurants and tourism (54%)
- Environmental commitments (36%)

–

YES – lowest:
- Secondary sector (20%)
- Tertiary sector, other (17%)
- No environmental commitments (9%)

Q26. Do your customers demand that your company make a commitment to reduce its environmental footprint?
Base: All respondents (n = 233).

Importance of environmental footprint reduction(1/2)



Q27. How important are the following aspects to your company from the standpoint of reducing your environmental footprint? Please answer on a scale from 1 to 10, with 1 being *not at all important* and 10 *extremely important*. Base: All respondents (n = 233).

Importance of environmental footprint reduction (2/2)

On the issue of environmental footprint reduction, respondents were asked to assess the importance of five aspects on a scale of 1 (not at all important) to 10 (extremely important). The aspect deemed to be the most important was waste management (recycling and composting) with a rating of 8.2 out of 10, 52% answered *very important* (ratings 9 and 10) and 82% somewhat or very important (ratings 7 to 10).

This was followed by two aspects deemed rather important, which finished in a virtual tie: energy efficiency (heating, air conditioning, insulation, lighting): average of 7.6, 40% with ratings of 9 and 10 and 73% with 7 to 10; and water management (consumption reduction, wastewater management): average of 7.5 – 41% with ratings of 9 and 10 and 69% with 7 to 10.

Two aspects were deemed of average importance: paperless office or zero paper: average of 6.6, 24% with ratings of 9 and 10 and 59% with 7 to 10 and transportation (more energy efficient, hybrid or electric vehicles, circuit optimization, etc.) average of 295 with ratings of 9 and 10 and 50% with 7 and 10.

Importance of some aspects of environmental footprint reduction	**Very important (ratings of 9 and 10) Statistically significant variances** +
Waste management (recycling and composting)	- Primary sector (72%) - Accommodation, restaurants and tourism (64%)
Energy efficiency (heating, air conditioning, insulation, lighting)	- Secondary sector (47%) - Accommodation, restaurants and tourism (54%) - Environmental commitments (45%)
Water management (consumption reduction, wastewater management)	- Primary sector (53%) - Accommodation, restaurants and tourism (61%)
Paperless office or zero paper	- Public and para-public sectors (34%) - 15 employees and over (33%)
Transportation (more energy efficient, hybrid or electric vehicles, circuit optimization, etc.)	- >60 % male employees (39%)

The significant variances show that some sectors believe some aspects are more important than the average:

- The accommodation, restaurant and tourism sector: waste management, energy efficiency and water management.
- The primary sector: waste management and water management.
- The secondary sector: energy efficiency.
- The public and para-public sectors: paperless office.

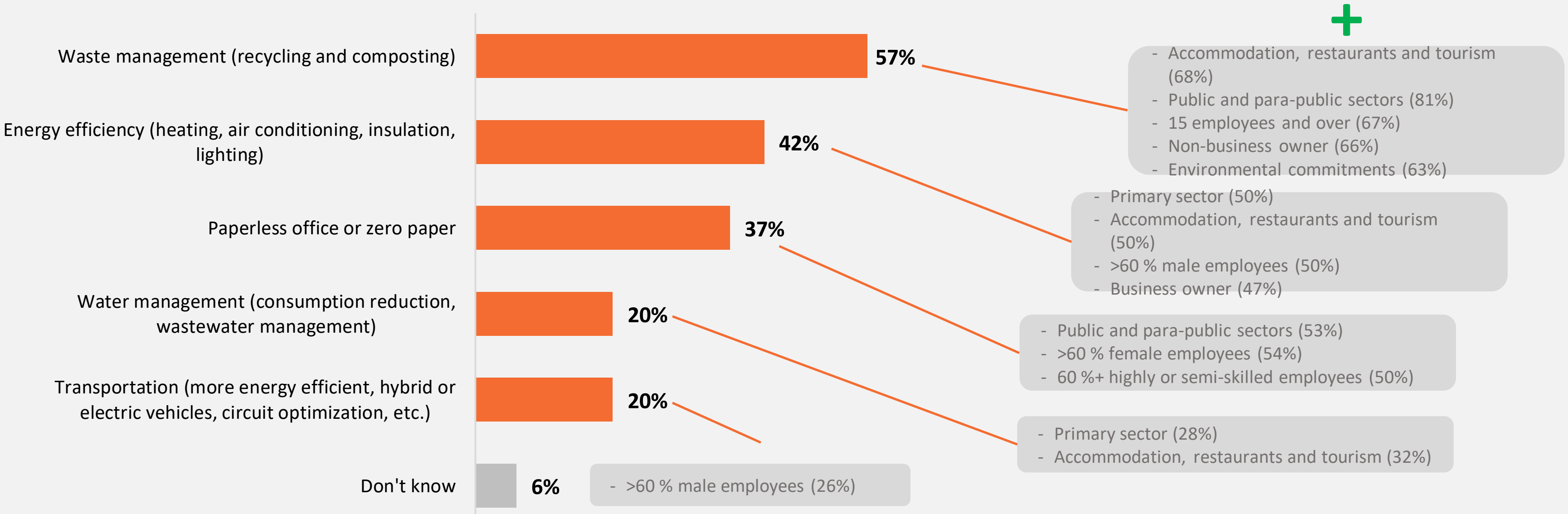
Q27. How important are the following aspects to your company from the standpoint of reducing your environmental footprint? Please answer on a scale from 1 to 10, with 1 being *not at all important* and 10 *extremely important*. Base: All respondents (n = 233).

Environmental footprint reduction priorities

When respondents are asked which of the five aspects mentioned are their two action priorities to reduce their environmental footprint in the next three years, waste management tops the list at 57%, with higher percentages posted in the accommodation, restaurant and tourism sector, the public and para-public sectors and in companies with at least 15 employees.

Another two issues were mentioned fairly often by respondents: energy efficiency (42%, more in the primary sector and in the accommodation, restaurant and tourism sector) and the paperless office (37%, more in the public and para-public sectors).

The other two aspects were mentioned by only 20% of respondents in each case: water management (more in the primary sector and in the accommodation, restaurant and tourism sector) and transportation.

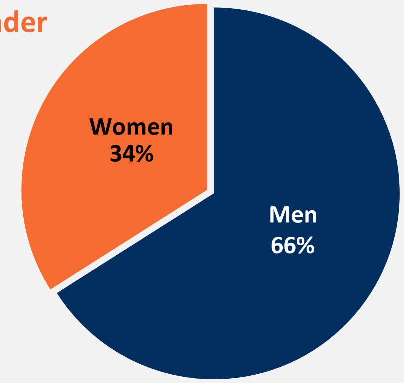


Q28. In the next three years, which of the five aspects mentioned are the two action priorities your company will take to reduce its environmental footprint? *Maximum of 2 choices*.
Base: All respondents (n = 233).

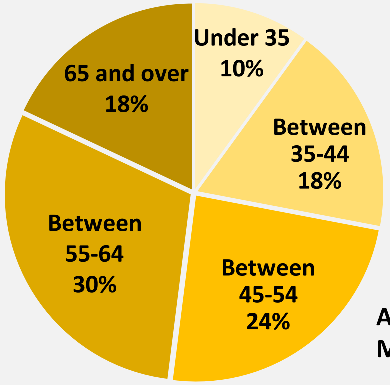
9. Company management succession

Profiles of owners of the businesses responding to the survey

Gender



Age



Average age: 52
Median age: 50

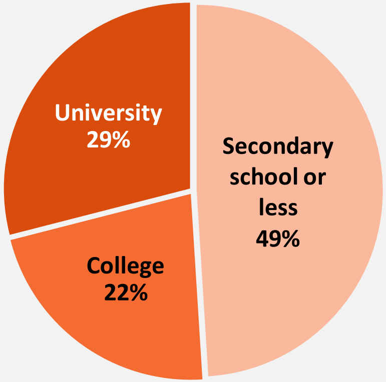
Two-thirds of the owners of business that responded are men.

They are relatively older (52 years old on average) and 48% are 55 and over. Only 28% are under 45.

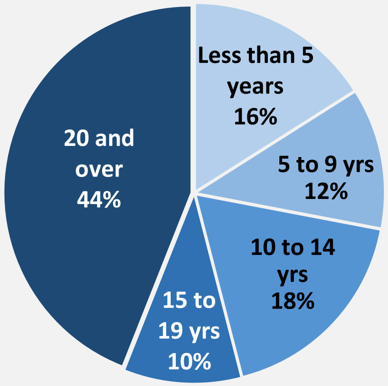
Half have high school or less, and 29% have a university education.

On average, they have owned their business for 16 years, and 44% at least 20 years.

Education



Number of years as owner



Average: 16 years
Median: 17 years

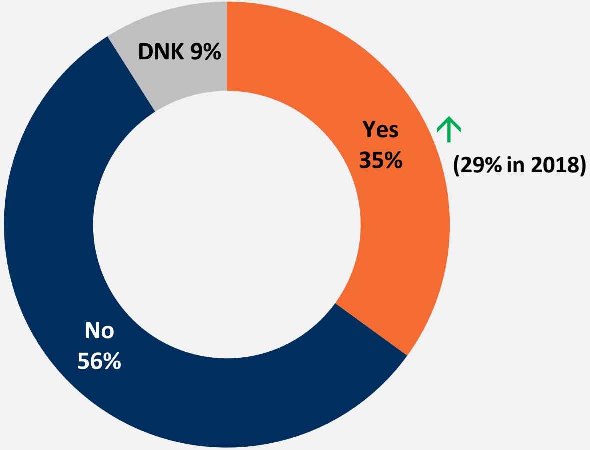
The following are a few questions on your profile as the business owner. Q29: You are:/Q30 You have: /Q31. What is the last level of education successfully completed?
Base Q29 to Q32: Respondents who own the business (n = 147).

Intention to step down as owner

Slightly more than one-third of the business owners who responded (35%) plan to step down as owner within the next five years. This is 6 points higher than the corresponding figure in the 2018 survey.

It is totally logical for this proportion to be higher in the 55 and over segment and among those who have been owners for 20+ years. It is lower in the under 45 category and among those who have been owners for fewer than 10 years.

Plans to leave within the next 5 years



YES – highest:
- 55-64 (48%)
- 65 years and over (67%)
- 20+ years as owner (51%)

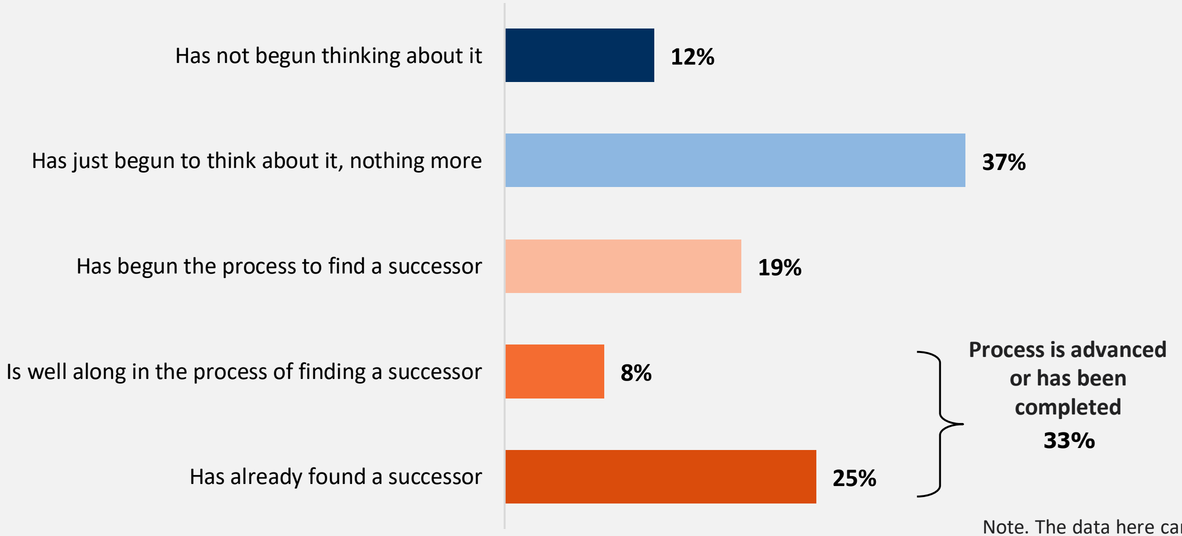
YES – lowest:
- Less than 45 (10%)
- High school or less (26%)
- Fewer than 5 years as owner (8%)
- 5 to 9 years as owner (18%)

Q33. Do you plan on stepping down as owner within the next five years?
Base: Respondents who own the company (n = 147).

Succession planning

The succession planning of those business owners planning to leave in the next five years has not gotten too far for the most part. Almost half (49%) have not begun the process or have done very little along these lines. 12% have not thought about it, and 37% have began to reflect on it, nothing more.

On the other end of the scale, one in three respondents (33%) say the process is well along or has been completed. 8% are well into the process of lining up a successor, and 25% have already found that person. The process is much further along for male respondents and those whose company is in the primary sector.



PROCESS ADVANCED OR COMPLETED – highest:
- Primary sector (83%)
- Men (42%)

PROCESS ADVANCED OR COMPLETED – lowest:
- Women (19%)

Note. The data here cannot be compared with the survey findings of 2018. Back then, the question had been put to all owners, but this year, only those planning to leave within the next five years were asked this question.

Q34. What stage are you at in the succession planning process?
Base: Business owners planning to leave within the next five years (n = 52).

Appendix: Questionnaire

Questionnaire (1/6)

Enquête de main-d'œuvre Vallée-de-la-Gatineau

Questionnaire

Bonjour, je me présente, _______________ de BIP Recherche, firme spécialisée en études et sondages.

Demander à parler au propriétaire (en priorité) ou au directeur général

Nous réalisons une étude pour le compte de la SADC Vallée-de-la-Gatineau, de la MRC Vallée-de-la-Gatineau et de Services Québec portant sur les prévisions d'emplois ainsi que les enjeux auxquels font face les entreprises, tels que le recrutement et la rétention de la main-d'œuvre, les changements technologiques, le commerce en ligne, la cybersécurité, l'environnement, etc. Votre participation serait grandement appréciée pour permettre à la SADC et à ses partenaires de la MRC de bien cerner vos besoins afin d'arrimer leurs actions au cours des prochaines années. Ces actions seront bénéfiques pour toute la communauté d'affaires de la Vallée-de-la-Gatineau.

Le sondage prend une quinzaine de minutes à répondre et il se complète plus facilement en ligne qu'au téléphone. Préférez-vous le faire en ligne ou par téléphone?

Auparavant, je dois vérifier deux informations pour s'assurer que votre entreprise est admissible à répondre.

0.1 Votre entreprise compte-t-elle des employés salariés, qu'ils soient à temps plein, à temps partiel ou saisonniers?

Oui 1
Non 2 ***TERMINER***

0.2 Êtes-vous bien situé sur le territoire de la MRC de la Vallée-de-la-Gatineau?

Oui 1
Non 2 ***TERMINER***

Il est important de préciser que le sondage s'applique uniquement à votre établissement situé sur le territoire de la MRC de la Vallée-de-la-Gatineau. Il exclut tout établissement ou succursale situé à l'extérieur de la MRC de la Vallée-de-la-Gatineau

Si le répondant préfère en ligne, prendre en note son nom et son courriel. Lui envoyer le courriel d'invitation avec le lien permettant d'accéder au sondage.

Identification de l'entreprise

1a. Nom de l'entreprise : ______________________________

1b. Nom du répondant : ______________________________

1c. Titre du poste occupé : ____________________________

1d. Êtes-vous propriétaire de l'entreprise?

Oui 1
Non 2

1e. Courriel : ______________________________________

2. SECTEUR D'ACTIVITÉ (CODE SCIAN). **Variable importée la base de données. Si l'information est manquante, poser la question suivante :**

Dans quel secteur d'activité votre établissement se situe-t-il?

____

La classification et le regroupement seront effectués à la fin de la collecte pour fins de traitement.

Les prochaines questions portent sur le **PROFIL DES EMPLOYÉS** dans votre entreprise.

3. En vous incluant, combien d'employés travaillent dans votre entreprise?

À temps plein ____
À temps partiel ____
Saisonniers (durant votre haute saison, si applicable) ____
TOTAL ____ ***doit s'afficher automatiquement***

Si en ligne, le répondant doit voir le total. Si par téléphone, dire le total (« vous avez donc au total xx employés »)

4. Combien y a-t-il de **postes** dans votre entreprise? Généralement, le nombre de postes est inférieur au nombre d'employés, car plusieurs employés peuvent occuper un même poste.

Nombre de postes ____

Pour les prochaines questions, nous vous demandons de répartir en pourcentage vos employés selon certains critères, au meilleur de votre connaissance. Veuillez décrire la situation lorsque vous êtes au maximum annuel de vos effectifs (par exemple, lorsque vous êtes en haute saison).

5. Veuillez répartir vos employés selon le genre

Hommes ____%
Femmes ____%
Le total doit donner 100 %

Questionnaire (2/6)

6. Veuillez répartir vos employés selon l'âge

Moins de 25 ans ____%
De 25 à 34 ans ____%
De 35 à 54 ans ____%
55 ans et plus ____%
Le total doit donner 100 %

7. Veuillez répartir vos employés selon l'ancienneté

Moins de 5 ans ____%
De 5 à 9 ans ____%
De 10 à 14 ans ____%
15 ans et plus ____%
Le total doit donner 100 %

8. Veuillez répartir vos employés selon le niveau de qualification des emplois

Emplois *très qualifiés* : requérant généralement une formation universitaire, tels que gestionnaires, cadres et professionnels ____%
Emplois *qualifiés ou semi qualifiés* : requérant une formation technique de niveau collégial (DEC technique) ou professionnelle de niveau secondaire (DEP) ____%
Emplois *peu ou non qualifiés* : requérant un diplôme d'études secondaires général (DES) ou aucun diplôme ____%
Le total doit donner 100 %

Les prochaines questions portent sur les **PRÉVISIONS EN MATIÈRE D'EMPLOIS** dans votre entreprise.

9. Combien d'emplois estimez-vous que vous aurez **à combler au cours de chacune des trois années à venir**? Cela inclut la création de nouveaux emplois, incluant ceux à temps partiel et saisonniers, ainsi que les remplacements pour départ à la retraite.

	a) 2023	b) 2024	c) 2025
Nombre d'emplois à combler [bornes de 1 à 998]	____	____	____
NSP/refus	99	99	99

10. Veuillez **répartir ce nombre d'emplois à combler** au cours de chacune des trois années à venir **selon le niveau de qualification des emplois**.

	a) 2023	b) 2024	c) 2025
Emplois ***très qualifiés*** : requérant généralement une formation universitaire, tels que gestionnaires, cadres et professionnels	___ %	___ %	___ %
Emplois ***qualifiés ou semi qualifiés*** : requérant une formation technique de niveau collégial (DEC technique) ou professionnelle de niveau secondaire (DEP)	___ %	___ %	___ %
Emplois ***peu ou non qualifiés*** : requérant un diplôme d'études secondaires général (DES) ou aucun diplôme	___ %	___ %	___ %
TOTAL *Le total doit donner 100 %*	___ %	___ %	___ %
NSP/refus	99	99	99

Les prochaines questions portent sur le **RECRUTEMENT DE LA MAIN-D'ŒUVRE**.

11. Au cours des trois prochaines années, et face aux changements qu'amène la rareté de main-d'œuvre, envisageriez-vous réaliser les actions suivantes?

		Oui	Non	NSP/ refus
a)	Parrainage d'étudiants poursuivant des études spécialisées	1	2	99
b)	Mentoring de jeunes décrocheurs pour des métiers non spécialisés	1	2	99
c)	Embauche de jeunes éloignés du marché du travail, encadrés par un intervenant en employabilité	1	2	99
d)	Embauche de travailleurs moins qualifiés que souhaité	1	2	99
e)	Embauche de travailleurs issus de l'immigration ou de communautés culturelles	1	2	99
f)	Embauche de travailleurs issus des communautés autochtones	1	2	99
g)	Embauche de travailleurs retraités	1	2	99
h)	Embauche de travailleurs ayant un handicap	1	2	99
i)	Embauche de travailleurs ayant un problème de santé mentale	1	2	99
j)	Embauche de travailleurs judiciarisés	1	2	99

Les prochaines questions portent sur la **FORMATION**, en considérant vos employés actuels et vos besoins d'embauche au cours des trois prochaines années (nouveaux emplois ou remplacement de départs à la retraite).

12. Quelles approches de formation conviendraient le mieux à votre entreprise? Veuillez indiquer toutes les réponses qui s'appliquent. **Mentions multiples**

Formation en présentiel (présence en personne du professeur)	1
Formation en ligne (à distance, avec ordinateur)	2
Apprentissage en milieu de travail (AMT – formation offerte directement dans le milieu de travail)	3
Formation en alternance travail-études (alternance entre formation à l'école et mise en pratique dans le milieu de travail)	4
Reconnaissance des acquis et des compétences (pour les travailleurs expérimentés sans diplôme ou les immigrants)	5
Aucune de ces réponses	8 **EXCLUSIF.**

BIP

Questionnaire (3/6)

13. Dans quels domaines serait-il bénéfique que vos employés reçoivent de la formation? Veuillez indiquer toutes les réponses qui s'appliquent. **Mentions multiples**

Formations en lien avec la gestion : administration, gestion d'entreprise, communication, marketing et mise en marché, gestion des ressources humaines, etc.	01
Formations techniques en lien avec des métiers industriels (secteurs agroalimentaire, manufacturier, construction, entreposage, transport, etc.), par exemple : mécanique/électromécanique, soudage, ligne de production, assemblage, instrumentation, automatisation, opération de machinerie, etc.	02
Formations en lien avec des métiers et professions du secteur tourisme, hôtellerie et restauration	03
Formations en lien avec des métiers et professions des secteurs de la santé et de l'éducation	04
Formations en lien avec les technologies et l'informatique, par exemple développement et mise à jour de site web, commerce électronique, utilisation des technologies numériques, nouveaux logiciels, le cloud, etc.	05
Bureautique, secrétariat, comptabilité	06
Formations linguistiques (français, anglais, francisation des immigrants)	07
Environnement et développement durable	08
Formation générale de base en entreprise (numératie, littératie, résolution de problèmes, etc.)	09
Santé et sécurité au travail	10
Autres domaines, veuillez préciser : ____________________	97 **OUVERTE.**
Aucune formation nécessaire	98 **EXCLUSIF.**
Je ne sais pas	99 **EXCLUSIF.**

5

Les prochaines questions portent sur les **ENJEUX ET DÉFIS** auxquels fera face votre entreprise.

14. Au cours des 3 prochaines années, les enjeux et défis suivants seront-ils très, assez, peu ou pas du tout importants dans votre entreprise?

		Très important	Assez important	Peu important	Pas du tout important	NSP/ refus
a)	Recrutement de main-d'œuvre	1	2	3	4	99
b)	Rétention de main-d'œuvre	1	2	3	4	99
c)	Relève des postes de direction	1	2	3	4	99
d)	Relève du ou des propriétaires	1	2	3	4	99
e)	Développement des compétences de vos employés	1	2	3	4	99
f)	Changements des comportements de la main-d'œuvre, par exemple des travailleurs qui quittent un secteur d'activité pour se recycler ailleurs	1	2	3	4	99
g)	Implantation des technologies numériques (automatisation, robotisation) dans vos différents processus de gestion tels que approvisionnements, fabrication des produits, prestation des services, service à la clientèle, communication interne, marketing, etc.	1	2	3	4	99
h)	Approvisionnements en matières premières, composantes ou produits finis	1	2	3	4	99
i)	Exigences des fournisseurs (délais, quantités minimales d'achat, conditions de paiements)	1	2	3	4	99
j)	Innovation dans les produits, les procédés, les services ou la commercialisation	1	2	3	4	99
k)	Développement des marchés à l'extérieur de votre région	1	2	3	4	99
l)	Concurrence des entreprises	1	2	3	4	99
m)	Accroissement du commerce ou de l'achat en ligne	1	2	3	4	99
n)	Changement du comportement des acheteurs ou des consommateurs, par exemple achats ou réservations en ligne, plus grande recherche d'information, critiques dans les réseaux sociaux	1	2	3	4	99
o)	Réduction ou réorganisation de vos heures de fonctionnement ou d'ouverture faute de personnel disponible	1	2	3	4	99
p)	Cybersécurité	1	2	3	4	99
q)	Réduction de votre empreinte environnementale	1	2	3	4	99
r)	Amélioration de l'image / de l'attractivité de votre entreprise	1	2	3	4	99

6

Questionnaire (4/6)

15. Quels principaux types de besoins, d'aide ou d'assistance-conseil seraient nécessaires pour aider votre entreprise pour faire face à ces enjeux? Vous pouvez mentionner tout ce qui s'applique. **Mentions multiples**

Diagnostic d'entreprise	1
Plan de formation ou de perfectionnement des dirigeants/des cadres	2
Plan de formation ou perfectionnement des employés	3
Partage de main-d'œuvre avec d'autres entreprises, notamment pour des postes à temps partiel ou saisonniers	4
Information sur les nouvelles tendances en matière de gestion des ressources humaines	5
Information sur les tendances de marché telles que comportement du client/consommateur, concurrence, démographie, styles de vie, etc.	6
Aide à l'implantation d'une politique gestion des ressources humaines	7
Aide à l'implantation des technologies numériques	8
Aide à l'implantation du commerce en ligne	9
Aide à l'innovation	10
Aide au développement des marchés extérieurs à votre région	11
Aide à la promotion de l'image de votre entreprise (marketing employeur)	12
Échanges/réseautage avec d'autres entreprises pour connaître les actions qu'elles ont posées	13
Autres, préciser ______________________	97

Les prochaines questions portent sur la **CYBERSÉCURITÉ**.

16. Êtes-vous au courant de l'entrée en vigueur, en septembre 2023, de la loi 25 modernisant des dispositions législatives en matière de protection des renseignements personnels? Cette loi fera en sorte que les entreprises devront se doter d'une politique en matière de protection des données et de cybersécurité.

Oui	1
Non	2
NSP/refus	99

17. Quelle est votre évaluation du risque que votre entreprise fasse l'objet d'incidents de sécurité informatique, par exemple intrusions, piratage, rançons, etc.? Ce risque est-il :

Très important	1
Assez important	2
Peu important	3
Pas du tout important	4
NSP/refus	99

18. Au cours des trois dernières années, votre entreprise a-t-elle subi des incidents de sécurité informatique (intrusions, piratage, rançons, etc.)?

Oui	1
Non	2
NSP/refus	99

Poser Q19 si 1 à la Q18

19. Quels ont été les principaux impacts de ces incidents de sécurité informatique? Vous pouvez mentionner tout ce qui s'applique. **Si téléphonique, lire les choix. Mentions multiples. Rotation aléatoire des énoncés**

Arrêt des opérations	1
Pertes de revenus	2
Paiement de rançon	3
Vols de données confidentielles	4
Autres, préciser ________	97
NSP/refus	99

20. Au cours des trois dernières années, votre entreprise a-t-elle mis en place des mesures visant à renforcer la sécurité de ses systèmes d'information et de gestion?

Oui	1
Non	2
NSP/refus	99

Poser Q21A si 2 ou 99 à la Q20

21A. Au cours de la prochaine année, votre entreprise prévoit-elle mettre en place des mesures visant à renforcer la sécurité de ses systèmes d'information et de gestion?

Oui	1
Non	2
NSP/refus	99

Poser Q21B si 1 à la Q20

21B. Au cours de la prochaine année, votre entreprise prévoit-elle renforcer davantage ses mesures de sécurité des systèmes d'information et de gestion?

Oui	1
Non	2
NSP/refus	99

Poser Q22 si 1 à la Q21A OU si 1 à la Q21B

22. Quelles mesures avez-vous mis en place ou prévoyez-vous mettre en place pour renforcer la sécurité de vos systèmes d'information et de gestion? Vous pouvez mentionner tout ce qui s'applique. **Si téléphonique, lire les choix. Mentions multiples. Rotation aléatoire des énoncés**

Gestionnaire de mot de passe	1
Double identification des utilisateurs	2
Copies de sécurité	3
Sensibilisation et formation des employés	4
Autres, préciser ________	97
NSP/refus	99

Questionnaire (5/6)

Les prochaines questions portent sur le **développement durable** et la **gestion environnementale**.

23. Selon vous, les dimensions suivantes sont-elles incluses dans le concept de développement durable? Rotation aléatoire des énoncés

	Oui	Non	NSP/ refus
a) La dimension économique	1	2	99
b) La dimension sociale	1	2	99
c) La dimension environnementale	1	2	99

24. Au cours des trois dernières années, votre entreprise a-t-elle pris des engagements en matière de réduction de son empreinte environnementale? Si téléphonique, lire les choix

Oui, ces engagements comportent des cibles chiffrées	1
Oui, mais ces engagements ne sont pas chiffrés	2
Non	3
NSP/refus	99

Poser Q25 si 3 ou 99 à la Q24

25. Au cours des deux prochaines années, votre entreprise a-t-elle l'intention de prendre des engagements en matière de réduction de son empreinte environnementale?

Oui	1
Non	2
NSP/refus	99

26. Vos clients exigent-ils de votre entreprise un engagement ou des actions en matière de réduction de son empreinte environnementale?

Oui	1
Non	2
NSP/refus	99

27. Quelle importance votre entreprise accorde-t-elle aux aspects suivants, dans l'optique de la réduction de son empreinte environnementale? Veuillez répondre sur une échelle de 1 à 10 où 1 signifie que cet aspect n'est *pas du tout important* et 10 que cet aspect est *extrêmement important*. Rotation aléatoire des énoncés

Si téléphonique, lire les parenthèses	Pas du tout important									Extrêmement important	NSP / NRP
a) Efficacité énergétique (chauffage, climatisation, isolation, éclairage)	1	2	3	4	5	6	7	8	9	10	99
b) Gestion des matières résiduelles (recyclage et compostage)	1	2	3	4	5	6	7	8	9	10	99
c) Gestion de l'eau (réduction de la consommation, gestion des eaux usées)	1	2	3	4	5	6	7	8	9	10	99
d) Transports (véhicules moins énergivores, hybrides ou électriques, optimisation des circuits, etc.)	1	2	3	4	5	6	7	8	9	10	99
e) Bureau sans papier ou zéro papier	1	2	3	4	5	6	7	8	9	10	99

28. Au cours des trois prochaines années, parmi les 5 aspects mentionnés, quelles sont les **deux priorités d'action** de votre entreprise visant la réduction de son empreinte environnementale? **Même rotation aléatoire qu'en Q26. Maximum 2 choix possibles.**

Efficacité énergétique	1
Gestion des matières résiduelles	2
Gestion de l'eau	3
Transports	4
Bureau sans papier	5
NSP/refus	99

Poser les Q29 à 34 si 1 (propriétaire) à la Q1d

Les dernières questions portent sur la **RELÈVE DE LA DIRECTION DE L'ENTREPRISE**.

Voici quelques questions sur votre profil comme propriétaire d'entreprise.

29. Vous êtes :

Un homme	1
Une femme	2

30. Vous avez :

Moins de 35 ans	1
Entre 35 et 44 ans	2
Entre 45 et 54 ans	3
Entre 55 et 64 ans	4
65 ans ou plus	5

31. Quel est le dernier niveau de scolarité que vous avez complété?

Secondaire ou moins	1
Collégial	2
Universitaire	3

32. Vous êtes propriétaire d'entreprise depuis :

Moins de 5 ans	1
5 à 9 ans	2
10 à 14 ans	3
15 à 19 ans	4
20 ans et plus	5

33. Prévoyez-vous quitter votre position de propriétaire de l'entreprise au cours des 5 prochaines années?

Oui	1
Non	2
Vous ne savez pas	99

Questionnaire (6/6)

Poser Q34 si 1 à la Q33

34. À quelle étape en êtes-vous rendu dans la planification de votre relève?

Vous n'avez pas amorcé de réflexion à ce sujet	1
Vous avez amorcé une réflexion, sans plus	2
Vous avez entrepris un processus pour trouver une relève	3
Vous êtes avancé dans le processus pour trouver une relève	4
Vous avez déjà trouvé une relève	5

Nous vous remercions d'avoir répondu à ce sondage!