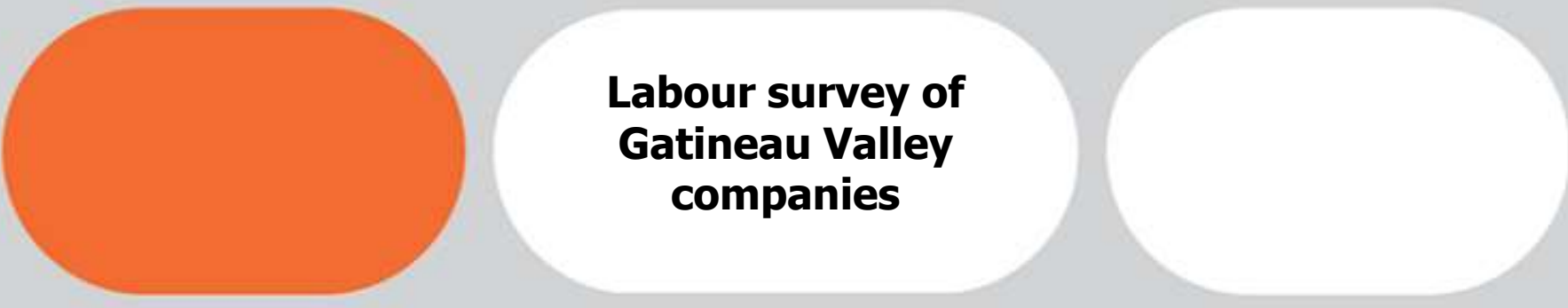




**Labour survey of
Gatineau Valley
companies**



Presented to the Gatineau
Valley SADC

Table of Contents

Highlights	3
1. Objectives	6
2. Methodology	7
3. Respondent profiles	11
4. Job profiles	13
5. Labour issues and challenges	18
6. Labour recruiting	22
7. Labour retention	31
8. Owner succession	33

Methodology and respondent profiles

- The survey was conducted using a combined telephone-online methodology of 306 companies located on the territory served by the Gatineau Valley SADC.
- Most of the persons who participated owned the companies surveyed (82%).
- Slightly more than half of the owners of the companies surveyed were men (56%), 55 years of age or older (51%), owners for more than 15 years (51%) and have high school or less (52%).
- About two-thirds (65%) of the companies surveyed have employees. Companies in the region are active in the following sectors: commerce/accommodation/restauration (28%), primary/transport sector (20%), professional services (17%), other services (17%), secondary sector (14%) and public administration (3%).

Job profiles

- The companies surveyed have 14.9 employees on average, i.e., 7.4 full time (50%), 3.9 part time (26%) and 3.6% seasonal (24%). However, one half of them (50%) do not have any part-time employees and 55% have no seasonal employees. The primary/transport sector employs fewer people in total (6.2) than the other sectors.
- Part-time employees work 22.3 hours per week on average and seasonal workers 21.2 hours. These proportions have been stable (72%, 73%) or have increased (19%, 17%) in the past 3 years. Almost 50% of seasonal employees are hired in April and May. Almost one-quarter (27%) of seasonal workers have to be replaced each year.
- Employees in the region are 54% male and 46% female and are distributed relatively equal in terms of their age: less than 35 (31%) 35-54 (40%), and 55 and over (30%). Almost 2/3 (61%) of employees have less than 10 years' seniority in the company.
- A union is present in only one company out of 10, and 50% of jobs are described as having few or no qualifications, i.e., no diploma or only a general high school diploma is required.

Labour issues and highlights

- In terms of labour, the most important issues facing the companies surveyed are recruiting (81%) and retention (84%) of qualified labour and the integration of employees from the younger generation (less than 35 years of age) (83%).
- Succession for executive/managerial positions (74%) and the recruiting of seasonal labour (71%) are also important challenges facing companies in the region.
- Most companies are open to hiring people from Indigenous communities (80%) or immigrants (72%).
- With respect to human resources in the next few years, the companies surveyed cited the retention of their employees (70%) and recruiting new people (44%) as the main objectives. In addition, one quarter of the companies (25%) believe they will be facing the possibility of having to train their employees.

Recruiting workers

- Companies in the region hired 5.5 employees on average in the past year, i.e., 1.6 full time (29%), 1.4 part time (25%) and 2.4 seasonal (44%). Close to half of the companies indicated that recruiting employees has been difficult, particularly due to the lack of labour and applicants. Recruiting is generally done through referrals from people who know somebody or from employees (66%), through the social media (32%), Emploi-Québec (27%) and newspapers (24%).
- Companies will have 3.5 positions to fill on average in the coming year, i.e., 1.1 full time (31%) 1.1 part time (31%) and 1.3 seasonal (37%). That said, 32% of the companies that responded do not anticipate having to fill any positions and 56% specifically said they will not have any full-time positions to fill. Slightly more than half of the companies that employ seasonal workers (54%) would be interested in working in cooperation with other employers that hire during different times of the year than them in order to fill seasonal positions.
- The lack of workers is perceived as an impediment to growth by more than half of the companies surveyed (53%). The consequences of this situation are many – employees have to work more hours (37%) and the company must turn down contracts or orders (30%). To make up for the shortage, companies in the region have taken numerous measures such as increasing salaries (45%), hiring less qualified workers (43%), younger people (42%) or retirees (39%).

Retaining workers

- Companies resort to a host of practices to retain workers, which mainly includes offering competitive compensation (71%), sharing information transparently (68%) and supporting life-work balance (65%).
- In order to help them with their efforts to recruit and retain employees, companies would like to exchange ideas with other entrepreneurs (40%) to find out what they have done about it and draw on their experiences. Obtaining human resources training (32%) and information on new practices in this field (30%) are other needs that were cited.

Succession

- Close to one-third of the business owners surveyed (29%) plan on leaving in the next 5 years. Most are older men who have been owners for more than 20 years.
- Only 12% of owners are far along in their succession process or have already lined up successors, but the figure is twice that among long-time owners.
- Most owners (65%) who planned to leave in the next 2 years and have started thinking about succession claim that they are facing specific issues, particularly financial challenges, not having any successors, finding a buyer, family challenges, etc.
- These owners would like to have individual guidance for themselves (41%) or their successors (33%), such as consultation, coaching, mentoring, etc., to support them during the succession planning process.
- Many of these owners (72%) claimed that they know the market value of their company. This is based on the market value (76%) or the book value (52%).

1. Objectives

The Gatineau Valley SADC retained BIP Research to survey companies in the region. This study is part of the “Chantier relève” (succession worksite) project. The general objective of the survey is to document the situation and the issues facing Gatineau Valley companies in terms of entrepreneurial succession and HR succession. The information gathered will enable SADC and local partners to effectively map out a course of action to address these topics over a timeframe of several years.

The survey covers two major issues confronting companies – recruiting and retention of workers and the succession of business owners.

- The section on the recruiting and retention of workers:
 - Establishes the profiles of jobs on the territory: the number of employees according to status, the characteristics of seasonal jobs, the breakdown of jobs by gender, age, seniority and level of qualifications, etc.
 - Identifies the main labour-related issues and challenges that companies face.
 - Delves into the recruiting problems: the number of hires, how readily workers can be hired, recruiting methods used, the number of positions to fill, the consequences of labour shortages for companies and measures taken to address this issue, practices and tools to make recruiting easier.
 - Looks more closely at the problem of retaining workers: practices conducive to retention, the companies’ needs so that they can receive support in their efforts to retain workers.
- The section on succession of business owners:
 - Examines the profiles of business owners.
 - Looks at how far along they are in planning their succession.
 - Discusses their concerns or specific challenges confronting them.
 - Reveals the type of resources they use.
 - Identifies the type of coaching they would like to receive with respect to succession planning.

2. Methodology

Target population

The target population consists of businesses in the territory served by the Gatineau Valley SADC, which provided BIP Recherche with a data base with the names of 1,181 businesses and their contact information. This figure was arrived at as follows:

- 1,347 names in the data base initially provided
- 288 that had no telephone
- + 122 numbers that SADC looked for

In order for a company to be eligible to take part in the survey, staff hiring decisions had to be made locally, i.e., in the establishment that is called.

Respondents to the survey were ranked in the following order of priority:

- The owner or one of the owners of the business.
- Secondly, the person responsible for human resources or production/operations. In this case, the respondent did not complete the section of the questionnaire dealing with the owner's succession.

Questionnaire

The questionnaire, which was designed jointly by SADC and BIP Recherche, had 90 variables, including 4 open-ended questions.

Depending on the answers to two introductory questions – whether or not there were employees (full time, part time or seasonal) and whether or not the respondent was the owner – there were four possible scenarios.

Possible scenarios	Paid employees	The respondent was the business owner	Sections of the questionnaire completed
A	Yes	Yes	The entire questionnaire
B	Yes	No	Job profile, labour-related issues and challenges, recruiting, retention
C	No	Yes	Management succession
D	No	No	The company was not eligible to take part in the survey

2. Methodology

How we conducted the survey

We used a combined telephone-online methodology. All respondents received a phone call in either English or French. Once the introduction was read and the objectives explained, eligible respondents who agreed to participate could choose to respond over the phone or online.

Those opting to respond on line were sent an invitation email with a link providing access to the survey. Most needed from one to three telephone reminders in the weeks following the invitation email.

Data collection

The survey was pretested with about 10 companies on October 30, 2018. No changes were made to the questionnaire following the pretest. The full survey itself ran from November 1 to 23, 2018. In total, 306 questionnaires were completed – 148 over the phone (48.4%) and 158 online (51.6%). The telephone interviews took 15.7 minutes on average. Our objective at the outset was to have 300 completed questionnaires.

The response rate (35% in this instance) is calculated according to the standards of the Marketing Research and Intelligence Association (MRIA). The administrative report on how the survey was conducted, which included the response rate, appears on the following page.

The margin of error is 4.8% 19 times out of 20, which takes into account the small sample size.

Data processing

Interviews were compiled using Voxco's Pronto software and processed using the Stat-XP software.

2. Methodology

Survey administrative report

	Fréquence	TOTAL
Numbers generated		1 181
A. Invalid numbers		173
Out of service	120	
Non-commercial	38	
Fax / Modem	15	
B. Numbers outside sample/not eligible		101
Non eligible	38	
Sick, disabled	13	
Duplicates, multiple contacts	19	
Language problem	1	
Impossible to reach/out of the sector	30	
C. Numbers in the sample for which eligibility could not be established		239
No answer/voice mail ⁽¹⁾	133	
Refusal before establishing eligibility	106	
D. Eligible numbers in the sample where the interview was not completed		362
Prolonged absence	2	
Questionnaires incomplete (refused to complete)	7	
Appointment scheduled but interview was not conducted / questionnaire emailed but not completed	215	
Refusal after eligibility established	138	
E. Complete interviews conducted		306
Response rate calculation⁽²⁾		34.9%
	$\frac{E}{C \times (TA^{(3)}) + D + E}$	
	$\frac{306}{876}$	

(1) For a number to be considered did not answer, it must be a number that was never answered throughout the data gathering process. For example, an appointment that was not completed for which there was no answer when a reminder was issued must be considered an incomplete appointment, not a did not answer.

(2) According to MIRA standards.

(3) ELIGIBILITY RATE : $\frac{D+E}{B+D+E} = \frac{668}{769} = 0.87$

2. Methodology

Segmentation variable

We processed and analyzed the findings based on several segmentation variables, which enabled us to perform a bivariate statistical analysis, i.e., the production of cross-referenced tables of dependent variables with independent (or segmentation) variables. This cross-analysis revealed whether there were any statistically significant differences per respondent group. If necessary, we indicated the most significant differences in the report.

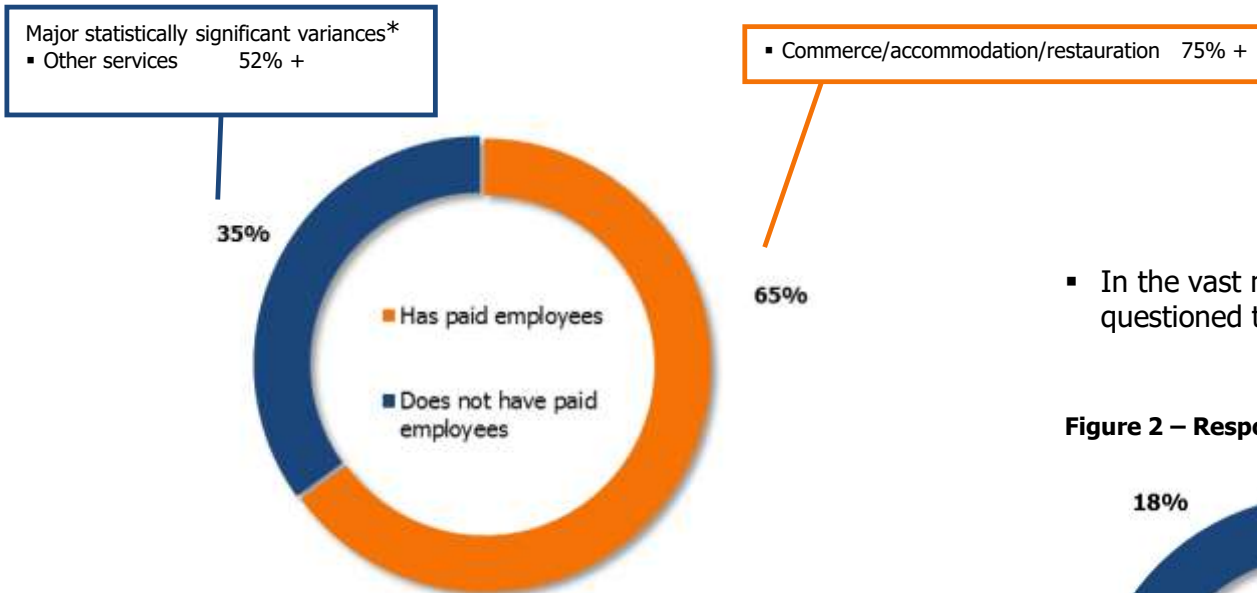
	Sections : Job profiles, issues and challenges with respect to labour, recruiting and retention	Section : Owner succession
Segmentation variables	NAICS area of activity	NAICS area of activity
	Total number of employees: small business (less than 5); medium-sized business (5 to 14); large company (15 and over)	Total number of employees (less than 5; 5 to 14; 15 and over)
	Percentage of employees 55 and over (0%, 1% to 49%); 50% and over)	Owner's gender (man, woman)
	Percentage of jobs that have few or no qualifications (0%, 1% to 49%; 50% and over)	Owner's age (<45, 45-54, 55-64; 65 and over)
	Total number of vacancies to be filled at present (0; 1 or 2; 3 and over)	Owner's education (secondary school or less; college; university)
	Union present (yes or no)	Number of years as owner (<5 years, 5-9 years; 10-19 years; 20 years and over)

Notes

- In the following chapters, the data expressed as a percentage have been rounded off with no decimals to make the figures and the tables less cumbersome. As a result, some totals may come to 99% or 101%.
- All of the cross-referenced tables, which show both the frequencies and the results of the bivariate statistical treatments, are in a document separate from this report.
- In the cross-reference tables, we took into account the significant differences in proportions when the difference achieved a confidence level of:
 - 99.9% and over, i.e., 4 plus (++++) and 4 minus (----);
 - 99% and over. i.e., 3 plus (+++) and 3 minus (---);
 - 95% and over, i.e., 2 plus (++) and 2 minus (--).

3. Respondent profiles

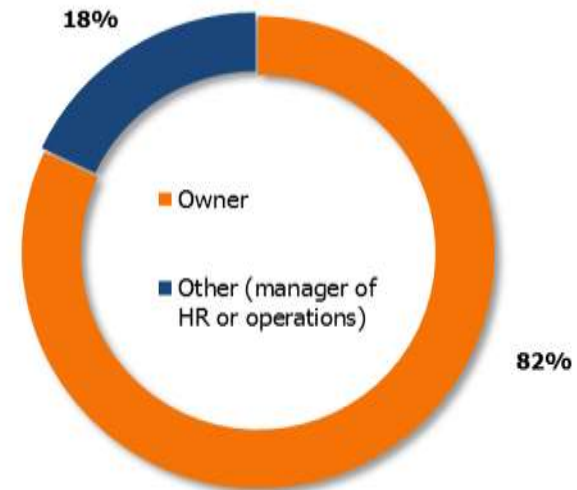
Figure 1 – Presence of paid employees (n=306)



- Two-thirds of the companies surveyed have paid employees. This is more often the case with companies active in the commerce/accommodation/restaurant sector.

- In the vast majority of cases (82%), we questioned the business owner.

Figure 2 – Respondent's position (n=306)



* All of the boxes relating to the figures in this report have statistically significant variances.

3. Respondent profiles

Table 1 – Area of activity of surveyed companies (n=306)

NCIAS code	Name	Number	Grouping	%
11	Agriculture, forestry, fishing and hunting	41	Primary sector, transport	20%
48-49	Transport & storage	21		
23	Construction	35	Secondary sector	14%
31-33	Manufacturing	9		
Tertiary sector				
41	Wholesaling	4	Commerce, accommodation and restauration	28%
44-45	Retailing	55		
72	Accommodation and restauration services	26		
51	Information industry and cultural industry	1	Professional services	17%
52	Finance and insurance	6		
53	Real estate and leasing services	4		
54	Professional, scientific and technical services	13		
56	Administrative services, support services, waste management services and sanitation services	3		
61	Teaching services	2		
62	Health care and social assistance	16		
71	Arts, entertainment and leisure	8		
81	Other services (except public administration)	52	Other services	17%
91	Public administration	10	Public administration	3%

Table 2 – Company location (n=306)

City/town	%
Aumond	2%
Blue Sea	3%
Bois-Franc	1%
Bouchette	6%
Déléage	8%
Denholm	1%
Egan Sud	4%
Gracefield	12%
Grand-Remous	9%
Kazabazua	3%
Kitigan Zibi (Indigenous territory)	2%
Lac Cayamant	2%
Lac Sainte-Marie	4%
Low	3%
Maniwaki	32%
Messines	5%
Montcerf-Lytton	4%
Sainte-Thérèse-de-la-Gatineau	2%

4. Job profiles

Number of employees

Table 3 – Number of employees (n=198)

Job status	Average number of jobs	Major statistically significant variances	Average without extreme values
Full time	7.4	<ul style="list-style-type: none"> ▪ Large companies ▪ 1-49% employees 55 yrs+ ▪ 1-49% empl. little/ho qual. ▪ 3+ positions to fill ▪ Union: yes ▪ Primary/transp. sector 	20.2 + 13.0 + 15.8 + 14.4 + 20.6 + 2.3 -
Part time	3.9		2.1
Seasonal	3.6	<ul style="list-style-type: none"> ▪ Large companies ▪ 3+ positions to fill ▪ 50%+ employees 55 yrs + ▪ 0% empl. little/no qual. 	12.4 + 9.3 + 1.1 - 0.9 -
Total	14.9*	<ul style="list-style-type: none"> ▪ 1-49% employees 55 yrs+ ▪ 3+ positions to fill ▪ Primary/transp. sector ▪ 0% empl. little/no qual. 	25.5 + 35.6 + 6.2 - 4.4 -

Calculations of averages include the zeros.

* In 2015, a study entitled a *Gatineau Valley Company Characterization Study* by Zins Beauchesne and associates showed that companies had 7.2 workers on average. The difference between the data in that study and this one is due to the fact that the sampling (eligibility criteria) was totally different, as were the objectives.

- The 198 respondents that have paid employees (table 3) have 14.9* employees on average: 7.4 full time (50%), 3.9 part time (26%) and 3.6 seasonal (24%)
- This average is inflated by a few extreme values, including a health care institution that has 577 employees. If the two highest numbers are excluded, the average drops to 11.1 employees per company.
- Half the companies (50%) do not have any part-time employees, and 55% do not have any seasonal employees (table 3a).
- In total, the respondents have 2,950 employees, which includes 1,465 full-timers (table 3a)
- The primary and transport sectors have fewer full-time jobs than the average company.

Table 3a – Respondent breakdown according to job status (n=198)

Job status	Full time	Part time	Seasonal	Total jobs
No. of employees				
0	10%	50%	55%	0%
1 to 4	49%	37%	31%	37%
5 to 14	29%	10%	8%	39%
15 and over	12%	3%	6%	24%
Total number of employees				
	1 465	772	713	2 950

4. Job profiles

Part-time employees

Table 4 – Number of hours worked by part-time employees (n=99)

Number of hours	%
1 to 15	32%
16 to 25	33%
More than 25	39%
Average number of hours	22.3
In the past 3 years, this average has been:	%
Increasing	19%
Stable	73%
Decreasing	8%

- Part-time employees work 22.3 hours a week (Table 4), a figure that has remained stable for 3 years.

Seasonal employees

Table 5 – Duration of seasonal employee jobs (n=90)

Number of weeks	%
1 to 15	29%
16 to 25	42%
More than 25	29%
Average number of weeks	21.2
In the past 3 years, this number has been:	%
Increasing	17%
Stable	72%
Decreasing	11%

Table 7 – Proportion of seasonal employees to be replaced annually in the past 3 years (n=90)

0%	38%
1% to 25%	24%
26% to 50%	21%
More than 50%	17%
Average percentage	27.3%

- Seasonal employees work 21.2 weeks per year (Table 5), a figure that has remained stable for the past three years. Slightly more than one-quarter (27%) of seasonal workers have to be replaced each year (Table 7).

Table 6 – Months when seasonal employees hired (n=90)

Months	%
January	6%
February	4%
March	9%
April	22%
May	27%
June	10%
July	7%
August	1%
September	2%
October	3%
November	7%
December	2%

- These figures peak in April and May (almost 50%) and bottom out in August and September (only 3%) (Table 6).

4. Job profiles

Employee breakdown by gender

Table 8 – Employee breakdown by gender (n=198)

Gender	Average breakdown	Major statistically significant variances	
Men	54.3%	<ul style="list-style-type: none"> ▪ Primary/transp. sector 71.3% + ▪ Secondary sector 81.5% + ▪ Other services 64.4% + ▪ 1-49% employees 55 yrs+ 60.9% + 	
Women	45.7%	<ul style="list-style-type: none"> ▪ Professional services 73.2% + ▪ 1-49% employees 55 yrs+ 39.1% - 	

Employee breakdown by age

Table 9 – Employee breakdown by age (n=198)

Age	Average breakdown	Major statistically significant variances	
Less than 25	11.7%	<ul style="list-style-type: none"> ▪ Professional services 19.6% + 	
25-34	18.9%	<ul style="list-style-type: none"> ▪ 0 vacancies 13.3% - 	
35-54	39.9%	<ul style="list-style-type: none"> ▪ Large companies 49.7% + 	
55 and over	29.5%	<ul style="list-style-type: none"> ▪ Small companies 36.8% + ▪ 0 vacancies 41.3% + ▪ 1-49 little/no qualifications 20.8% - 	

Table 8a – Respondent breakdown by gender (n=198)

% of employees	Gender	
	Women	Men
0% to 9%	21%	18%
10% to 49%	30%	21%
50% to 89%	29%	37%
90% to 100%	20%	24%

Table 9a – Respondent breakdown by age per age segment (by proportion) (n=198)

% of employees	Age	25-34	35-54	55 and over
	Gender than 25			
0%	54%	41%	17%	26%
1% to 49%	37%	45%	43%	43%
50% and over	9%	13%	40%	31%

- The employees of the 198 respondents are 54% male and 46% female (Table 8).
- There are more male employees in the primary/transport, secondary and other services sectors (Table 8).
- More than two-thirds of employees of respondents are over 35. Those 55 and over represent close to a third (Table 9).
- More than one half of companies (54%) have no employees under 25 (Table 9a). At least one half of employees are 55 and over in close to one third (31%) of the companies. This illustrates that the workforce is aging.

4. Job profiles

Employee distribution by seniority

Table 10 – Employee distribution by seniority (n=198)

Seniority	Average breakdown	Major statistically significant variances	
Less than 5 years	39.6%	▪ No employees 55 and over	62.1% +
5-9 years	21.2%		
10-14 years	13.2%	▪ Large companies ▪ 1-49% employees 55 and over ▪ 1-49 employees little/no qual. ▪ 3+ positions to fill	21.3% + 19.5% + 20.7% + 19.5% +
15 and over	26.0%	▪ 50%+ employees 55 and over ▪ No positions to fill	38.8% + 33.0% +

Table 10a – Respondent breakdown by seniority and by seniority category (by proportion) (n=198)

Seniority % of employees	Less than 5 years	5-9 years	10 to 14 years	15 years and over
0%	17%	40%	56%	40%
1% to 49%	46%	44%	33%	34%
50% and over	37%	16%	11%	26%

- Four employees in 10 have fewer than 5 years' seniority while more than a quarter have more than 15 years (Table 10).
- In 37% of companies, at least half of the employees have 5 years' seniority. 40% of companies do not have any employees with 15 years of seniority and over.(Table 10a).

Breakdown of employees by job qualification level

Table 11 – Breakdown of employees by job qualification level (n=198)

Qualification level	Average distribution	Major statistically significant variances	
Very qualified	13%		
Qualified or semi-qualified jobs	37%	▪ Commerce/accommodation /restauration	28.9% +
Low or non-qualified jobs	50%	▪ Commerce/accommodation /restauration	61% +

Table 11a – Respondent breakdown by job skills by qualification category (by proportion) (n=198)

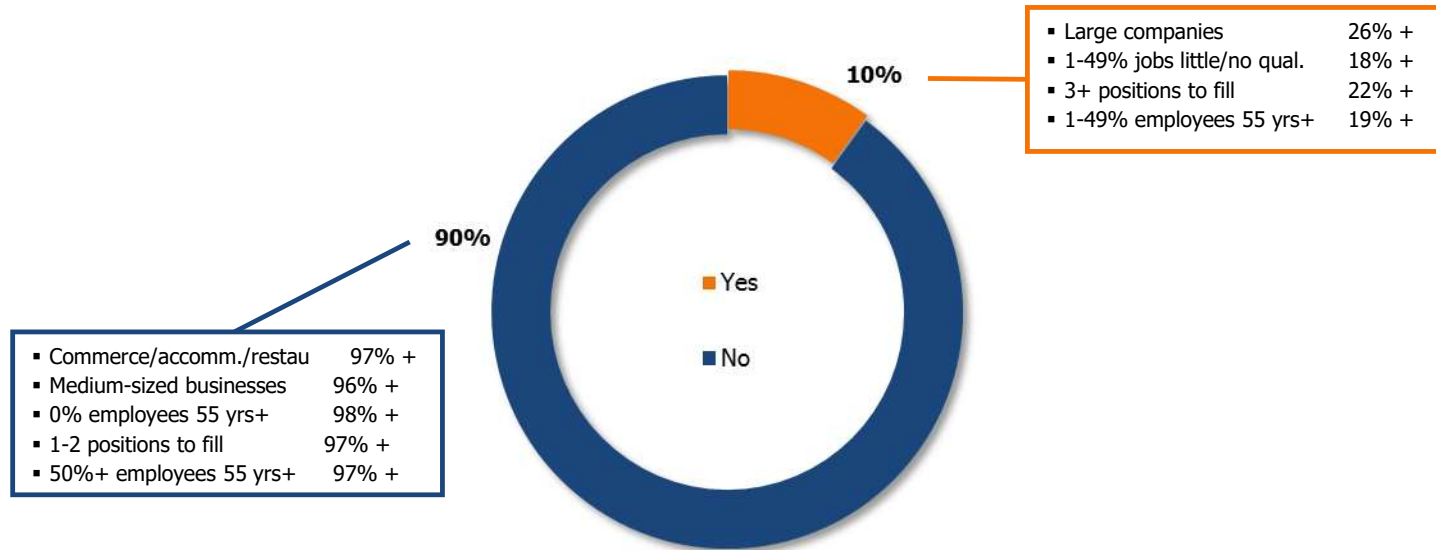
Qualification level % of employees	Very qualified jobs	Qualified or semi-qualified jobs	Little or no qualifications
0%	61%	33%	24%
1% to 49%	27%	26%	23%
50% and over	12%	40%	54%

- One-half of employees in the companies surveyed hold jobs requiring few or no qualifications, i.e., no diploma or just a general high school diploma. Very qualified jobs that require university training only account for 13% of the total jobs in the region (Table 11).
- 61% of respondents do not have any very qualified jobs (Table 11a).

4. Job profiles

Unionization

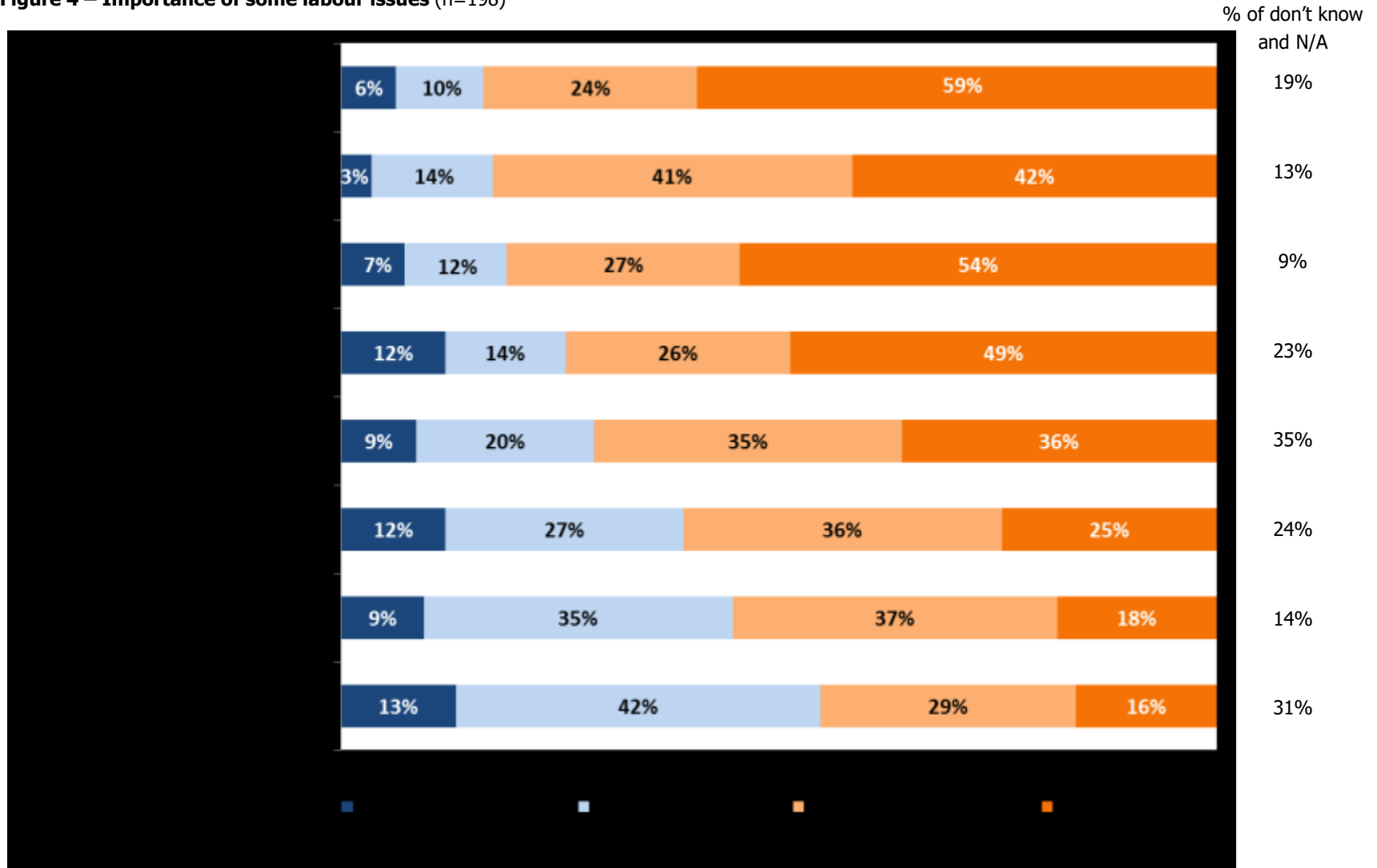
Figure 3 – Presence of a union in the company (n=198)



- Only one in ten companies taking part in the survey is unionized. More than one-quarter of companies in the region with more than 15 employees are unionized.

5. Labour issues and challenges

Figure 4 – Importance of some labour issues (n=198)



Excludes the *Don't know* and the *Not applicable*.

5. Labour issues and challenges

Table 12 – Importance of some issues – major statistically significant variances

Issues	% very and rather important	Major statistically significant variances	
Retention of qualified labour (n=160)	84%	<ul style="list-style-type: none"> Small companies 50%+ empl. little/no qualif. 	74% - 76% -
Integration of employees from the young generation (millennials, younger than 35) (n=173)	83%	<ul style="list-style-type: none"> Large companies 	94% +
Recruiting of qualified labour (n=180)	81%	<ul style="list-style-type: none"> 0% empl. little/no qualif. 1-49% empl. little/no qualif. 	93% + 96% +
Succession for executive/management positions (n=152)	74%	<ul style="list-style-type: none"> Small companies 50%+ empl. little/no qualif. 	61% - 64% -
Recruiting of seasonal staff (n=128)	71%		
Retention of labour with little or no qualifications (n=151)	61%	<ul style="list-style-type: none"> Commerce/accomm./restaur 1-49% employees 55 yrs+ 3+ positions to fill Small businesses 	71% + 69% + 80% + 39% -
Recruiting of labour with little or no qualifications (n=170)	55%	<ul style="list-style-type: none"> 0% empl. little/no qualif 	38% -
Integration of employees who are immigrants or from cultural communities (n=137)	45%	<ul style="list-style-type: none"> 0% empl. little/no qualif 	61% +

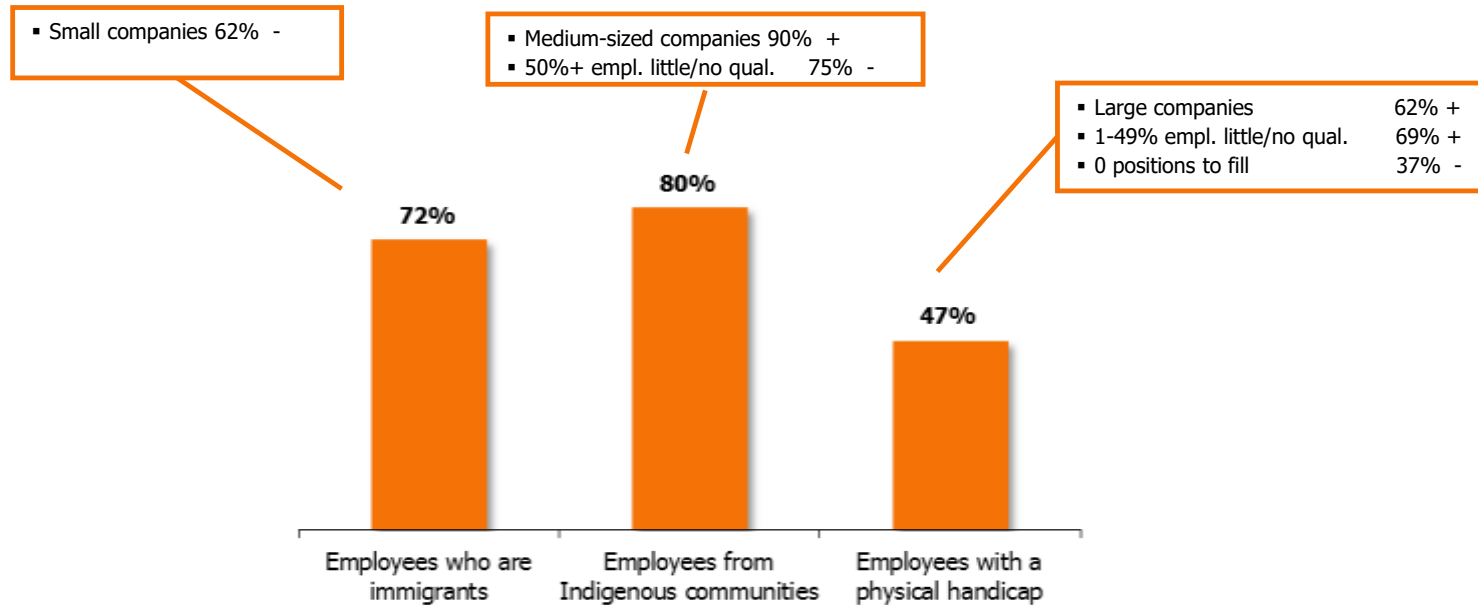
- The three most important issues for companies in the region are retention (84%) and recruiting (81%) of qualified labour, and the integration of employees 35 and under (83%) (Table 12).
- This is followed by concerns about company management succession (74%) and the recruiting of seasonal employees (71%).
- The issues of integrating employees from cultural communities or those with few or no qualifications are of less concern to the companies surveyed.
- According to the companies, recruiting for seasonal jobs is difficult due to the general lack of labour and the very nature of those types of jobs, i.e., short term, unstable, few hours offered and a modest salary (Table 13).

Table 13 – Reasons why recruiting seasonal workers is difficult (n=91)

Reasons	%		%
Lack of labour/lack of qualified labour	22%	Distance / remote reition	6%
Job or short duration/not long enough to get employment insurance	15%	Standards to follow/restrictive policies/government measures	6%
Full-time job preferred/not enough hours	13%	It is full employment/already have a job	3%
Pay not high enough	9%	Competition with other regions/cities/towns	2%
Seasonal job/not year round/not stable	7%	People don't want to work	2%
Jobs mostly for young people or retirees/lack of young people	7%	People want to be paid under the table/in cash	2%
Demanding jobs/very physical	6%	Do not know/refused to answer	28%

5. Labour issues and challenges

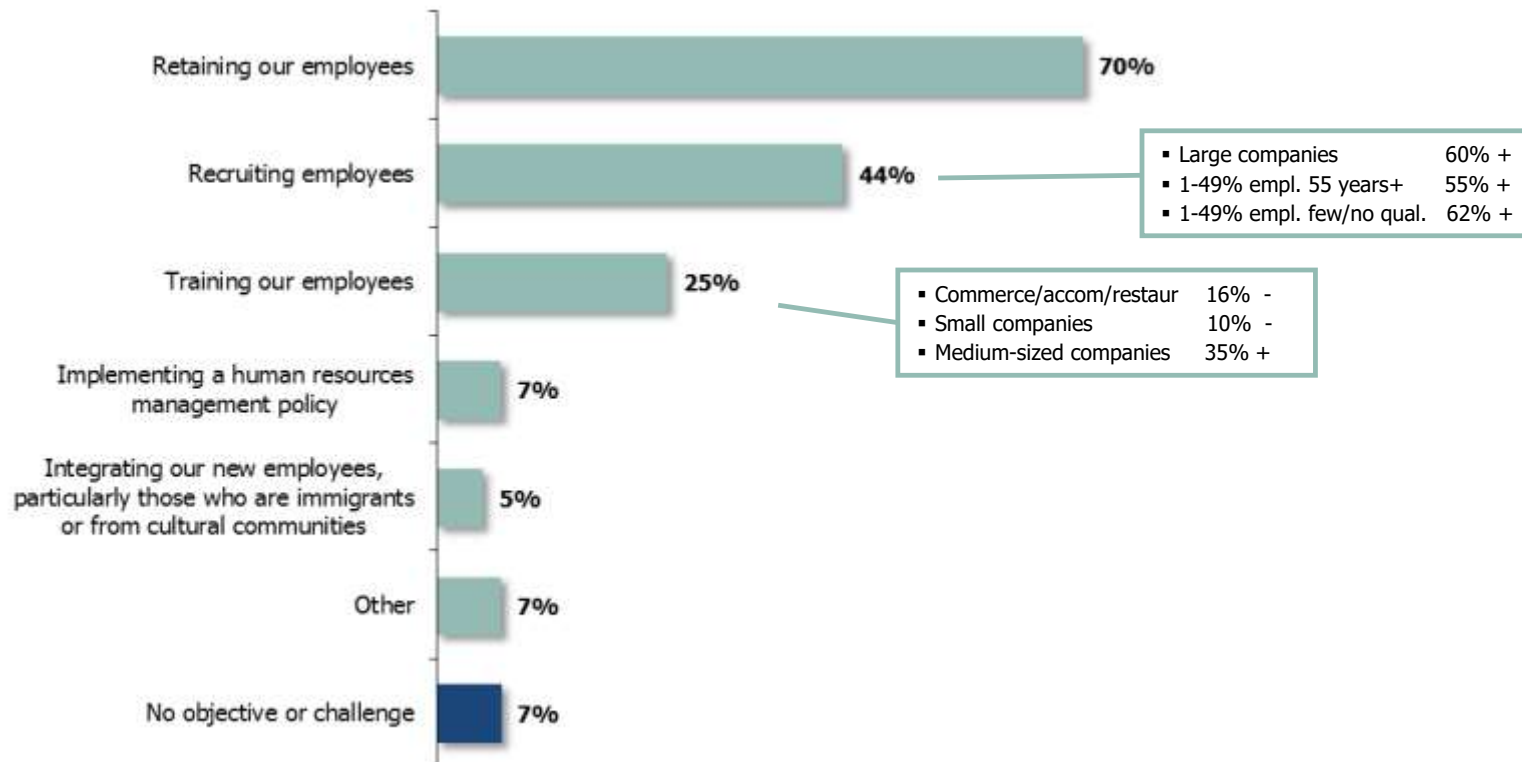
Figure 5 – Openness to hiring certain categories of employees (n=198)



- Respondents with paid employees are open to hiring employees from Indigenous communities (80%) or immigrants (72%). However, less than half are willing to take on employees with a physical handicap (47%).

5. Labour issues and challenges

Figure 6 – Principal human resources objectives and challenges for the next three years (n=198)



- The companies surveyed believe that, in the coming years, retaining employees will be their biggest human resources issue (70%), followed by recruiting (44%) and training (25%).
- Employee training will be an important issue for a quarter of the companies in the region.

6. Recruiting

Number of employees hired

Table 14 – Number of employees hired in the past year (n=198)

Job status	Average number of hires	Major statistically significant variances	Average without the extreme values
Full time	1.6	<ul style="list-style-type: none"> ▪ Primary/transp. sector ▪ Large companies ▪ 1-49% employees 55 yrs + ▪ 3+ vacancies to fill 	0.6 - 3.7 + 2.7 + 3.3 +
Part time	1.4	<ul style="list-style-type: none"> ▪ Large companies ▪ 3+ vacancies to fill ▪ 50%+ employees 55 yrs + ▪ 0% jobs. little/no qual. 	3.9 + 4.0 + 0.3 - 0.6 -
Seasonal	2.4	<ul style="list-style-type: none"> ▪ Medium-sized businesses ▪ 0% jobs little/no qual. ▪ 1-2 positions to fill ▪ 1-49% of employees 55 yrs+ 	0.4 - 0.4 - 0.5 - 5.0 +
Total	5.5	<ul style="list-style-type: none"> ▪ Primary/transp. sector ▪ 0% jobs. little/no qual. ▪ Large companies ▪ 1-49% employees 55 yrs+ ▪ 3+ vacancies to fill 	2.8 - 2.9 - 12.0 + 9.9 + 11.3 +

Calculations of averages include the zeros.

- 16% of respondents did not hire any employees and 7% hired 15 or more (Table 14a).

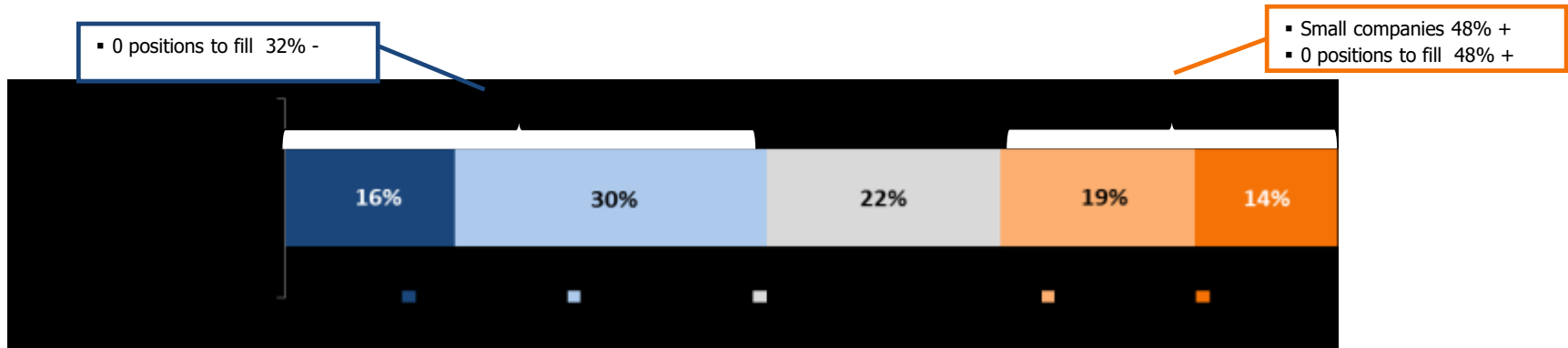
- Respondent companies hired an average of 5.5 employees in the past year, as follows: 1.6 full time (29%), 1.4 part time (25%) and 2.4 seasonal (44%) (Table 14).
- This average is inflated by a few extreme values, including three companies in the construction, accommodation and other services sectors which hired more than 80 seasonal employees in 2018. When the highest values are eliminated, the average number of employees hired falls to 4.0.
- Respondents hired a total of 1,077 employees in the past year. It must be noted that this does not necessarily mean that 1,077 new jobs were created in the region. In fact, some of these jobs involve, for example, replacing employees who have retired or poaching seasonal workers from competitors, etc.

Table 14a – Breakdown of the number of employees hired according to job status (n=198)

Job status No. hired	Full time	Part time	Seasonal	Total jobs
0	50%	59%	62%	16%
1 to 4	40%	33%	30%	62%
5 to 14	6%	5%	3%	13%
15 and over	2%	2%	3%	7%
Total number of hires				
	317	277	483	1 077

6. Recruiting

Figure 7 – Ease with which employees were recruited in the past year (n=162)



- Almost half of the companies that hired employees in the past year found it difficult to recruit them.

Table 15 – Reasons for which recruiting the employees that were hired was difficult (n=74)

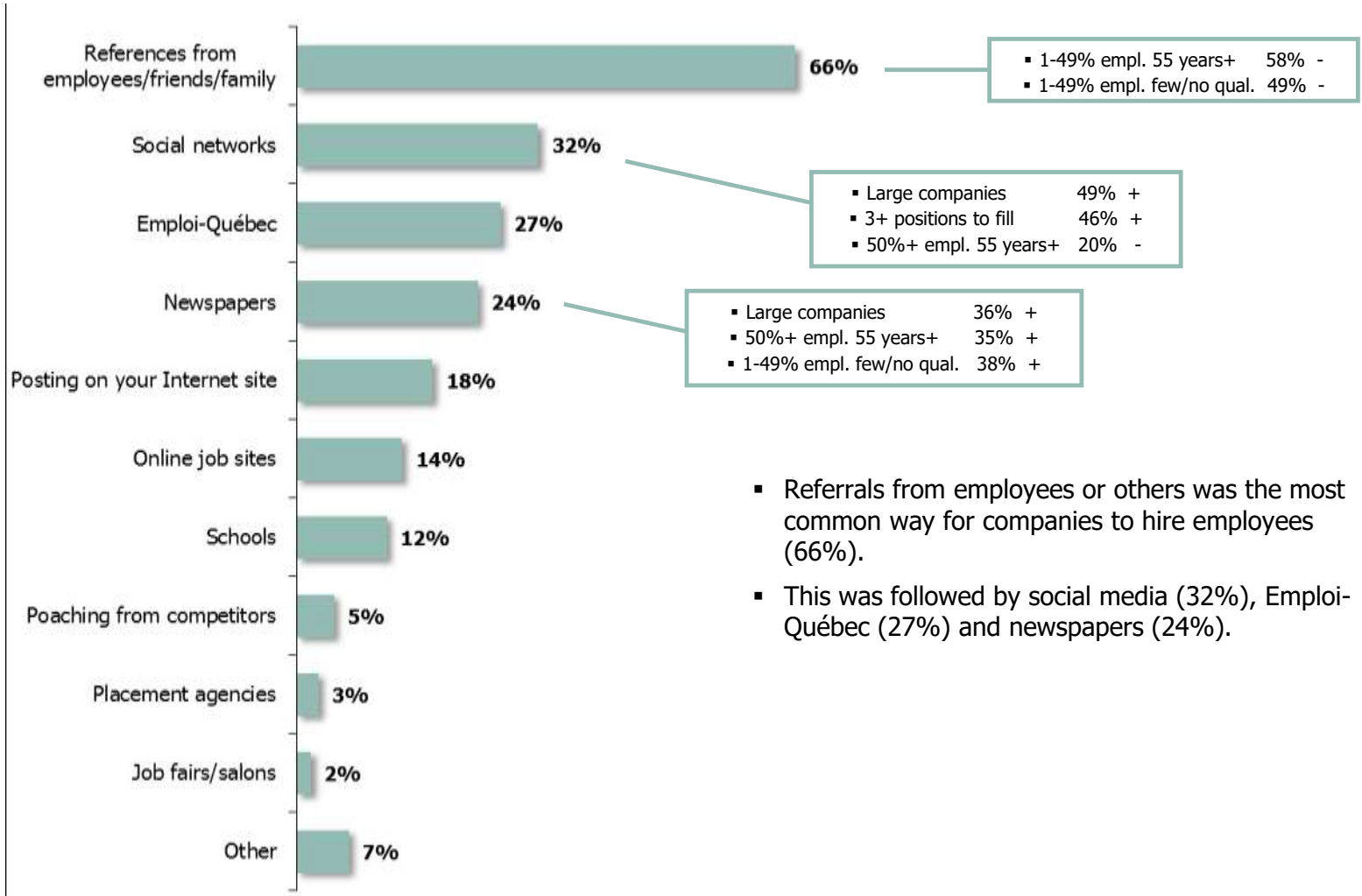
Reasons	%
Lack of labour/qualified labour	38%
Lack of application/people don't want to work/lack of applications	19%
Few hours offered/seasonal work/not permanent/ part time	10%
Distance/too far	8%
Due to CCQ regulations	4%
Difficult physical conditions	3%
Employees looking to work under the table	3%
Low/basic salary offered	3%
Other	5%
Did not know/refused to answer	19%

Table 16 – Reasons for which recruiting the employees that were hired was easy (n=52)

Reasons	%
Candidate was a friend/relative	23%
Former employee	15%
Reputable employer/people want to work there/spontaneous applications	12%
Recommendations/references	10%
Several applications	8%
Competent candidates	8%
Other	10%
Did not know/refused to answer	17%

6. Recruiting

Figure 8 – Recruiting methods (n=198)



- Referrals from employees or others was the most common way for companies to hire employees (66%).
- This was followed by social media (32%), Emploi-Québec (27%) and newspapers (24%).

6. Recruiting

Number of positions to fill

Table 17 – Number of positions to fill in the coming year (n=198)

Job status	Average number of hires	Major statistically significant variances	Average without the extreme values
Full time	1.1	<ul style="list-style-type: none"> ▪ Primary/transp. sector ▪ 0% empl. little/not qual. ▪ Large companies ▪ 1-49% employees 55 yrs+ 	0.4 - 0.5 - 2.7 + 1.7 +
Part time	1.1	<ul style="list-style-type: none"> ▪ Primary/transp. sector ▪ Secondary sector ▪ Small companies ▪ 50%+ employees 55 yrs + ▪ 0% empl. little/not qual. 	0.2 - 0.2 - 0.2 - 0.2 - 0.3 -
Seasonal	1.3		
Total	3.5	<ul style="list-style-type: none"> ▪ Primary/transp. sector ▪ 0% empl. little/no qual. ▪ Large companies ▪ 1-49% employees 55 yrs + 	1.4 - 1.1 - 9.8 + 5.8 +

Calculations of averages include the zeros.

- In the coming year, respondents will have to fill an average of 3.5 positions, as follows: 1.1 full time (31%), 1.1 part time (31%) and 1.3 seasonal (37%) (Table 17).
- This average is inflated by a few extreme values, including one health facility and one hotel that have approximately 100 positions to fill. When the highest values are eliminated, the average falls to 2.5 positions to fill.

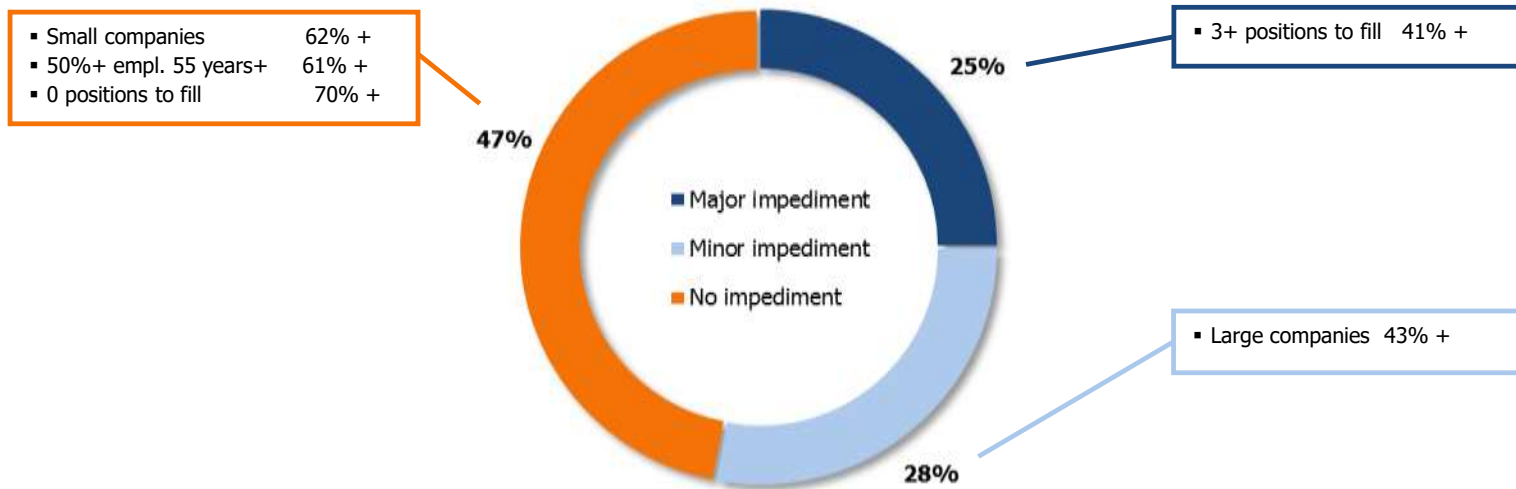
Table 17a – Breakdown of the number of positions to fill in the coming year by job status (n=198)

Job status	Full time	Part time	Seasonal	Total jobs
No. of positions to fill				
0	56%	69%	65%	32%
1 to 4	36%	25%	27%	52%
5 to 14	5%	1%	3%	11%
15 and over	1%	2%	2%	3%
Total number of positions to fill				
	218	137	168	693

- Respondents have a total of 693 positions to fill. Large companies have the greatest number of positions to fill, while companies in the primary/transport sector have the fewest (Table 17a).
- 32% of respondents have no positions to fill and 56% have no full-time positions to fill.

6. Recruiting

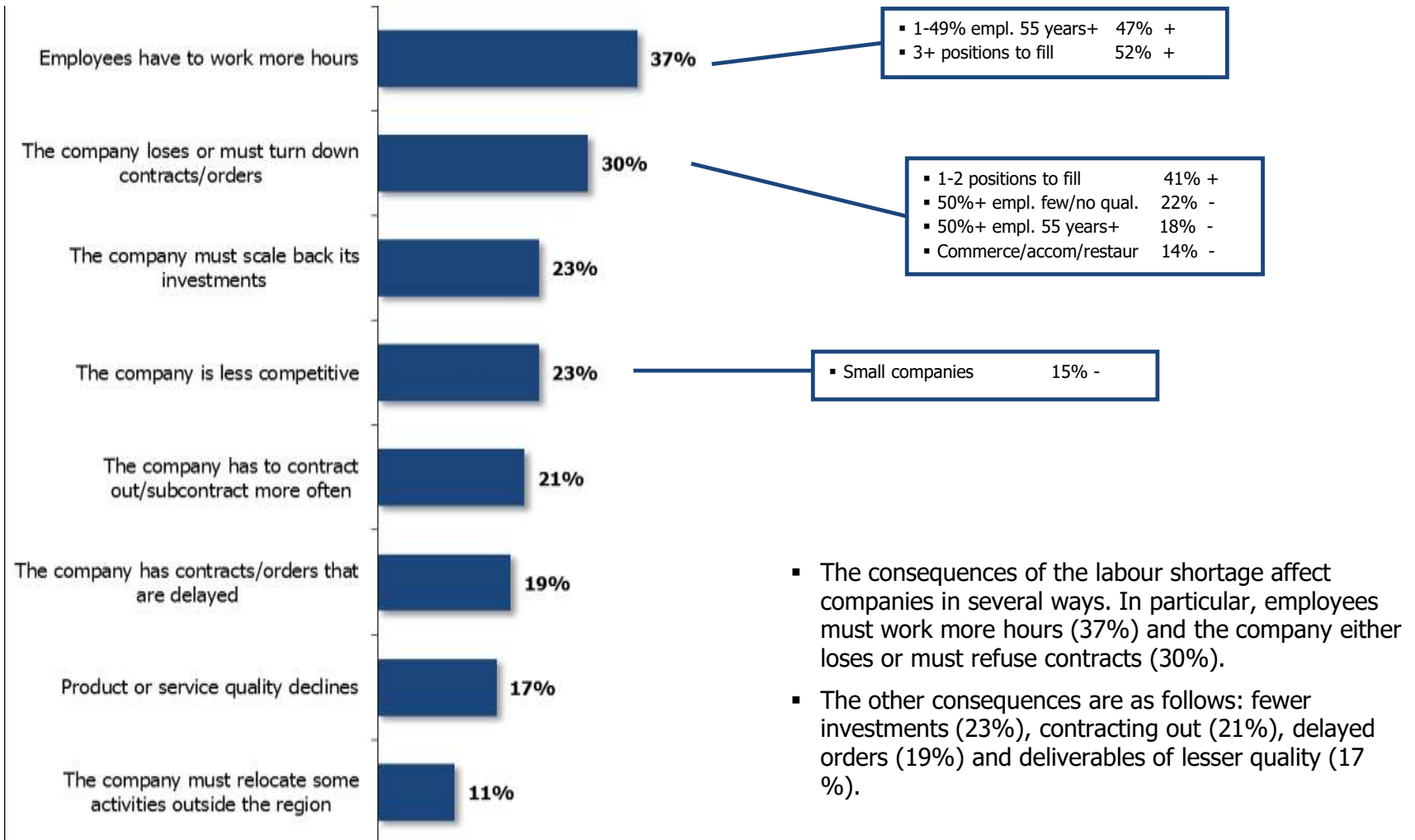
Figure 9 – Impact of the labour shortage on the growth of companies (n=198)



- Over half of respondents (53%) believe that the labour shortage represents a major (25%) or a minor (28%) obstacle to the growth of their company. The labour shortage has less of an impact on the growth of very small companies or on that of those with a large pool of older employees.

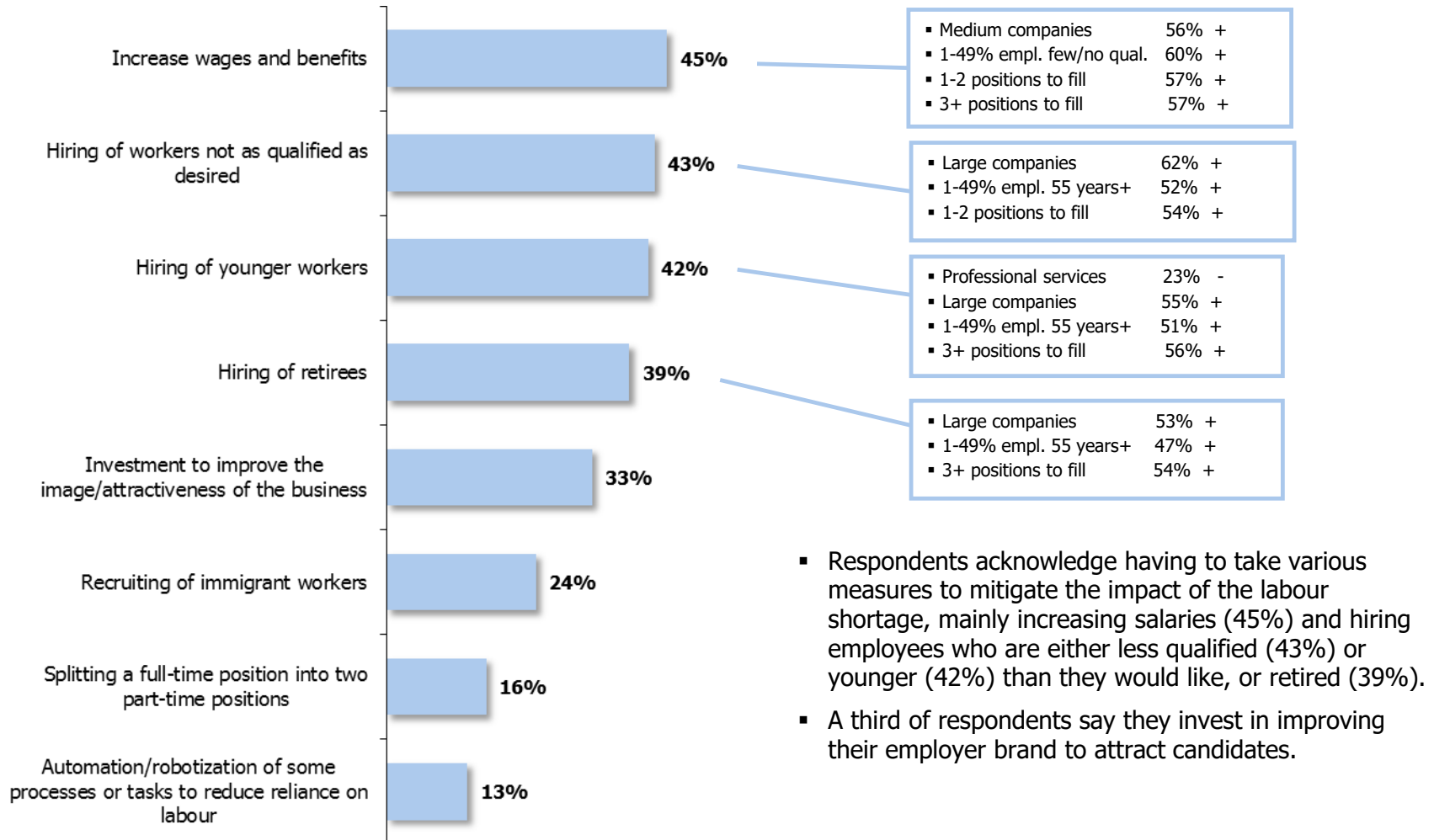
6. Recruiting

Figure 10 – Consequences of the labour shortage on the growth of companies (n=198)



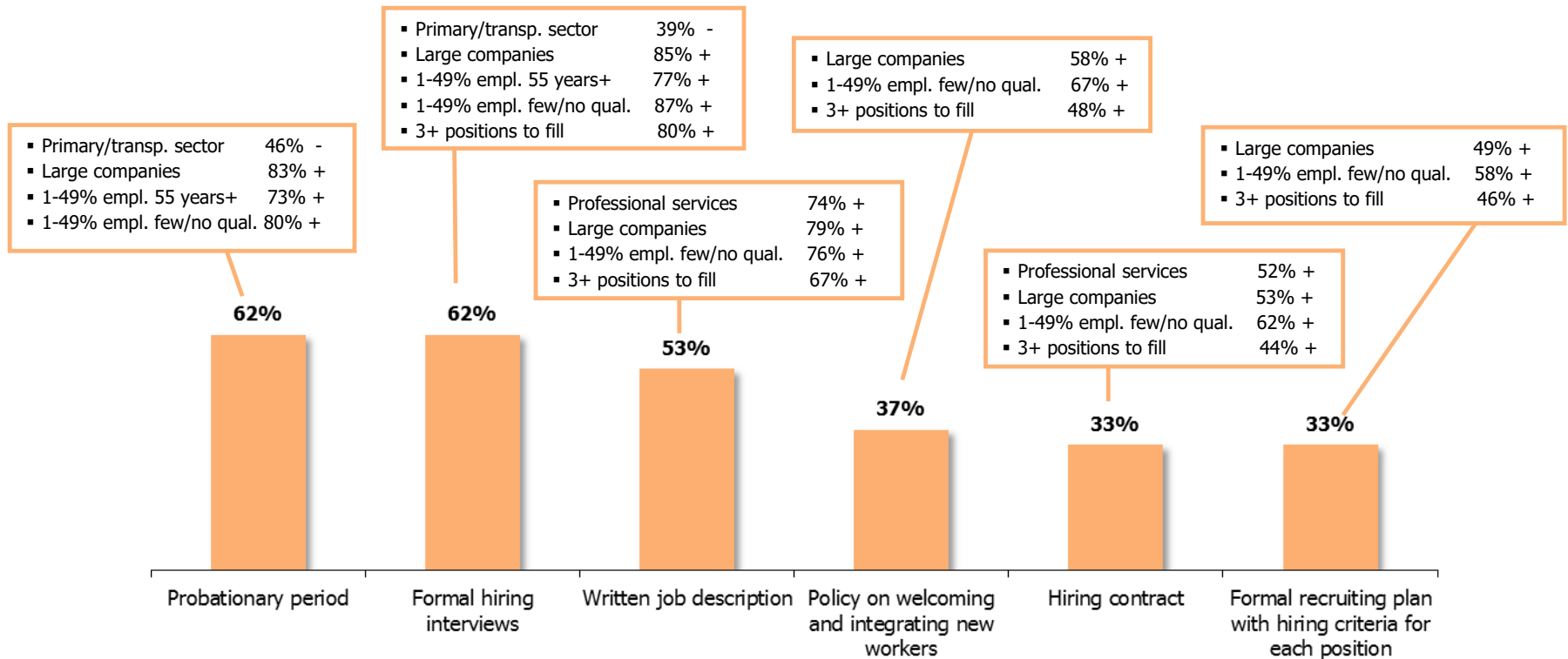
6. Recruiting

Figure 11 – Measures that companies must take in the context of a labour shortage (n=198)



6. Recruiting

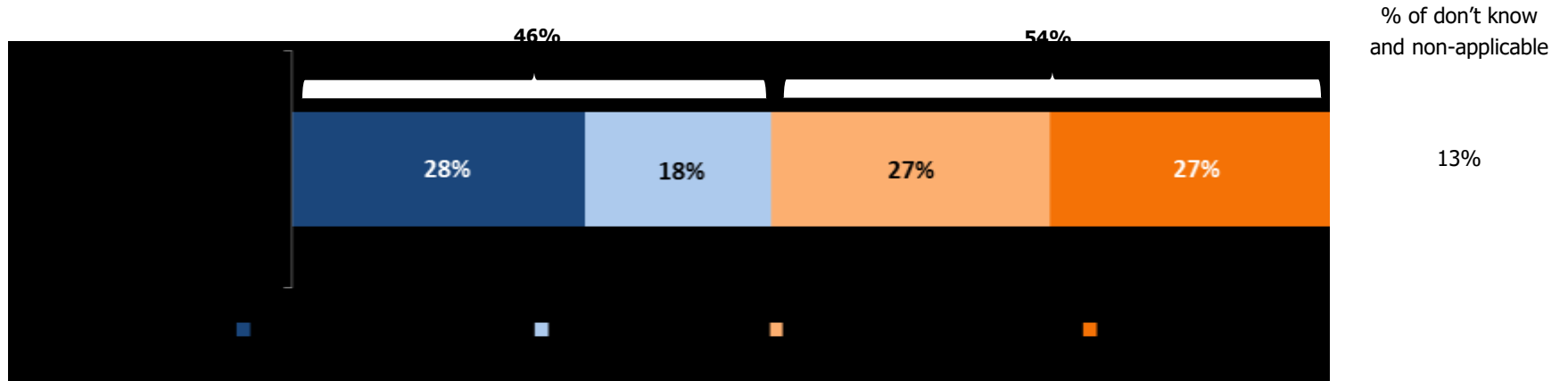
Figure 12 – Use of the following recruiting tools or practices (n=198)



- Over half of the region's companies adopt the following recruiting practices: a probation period (62%), formal interviews (62%) and written job descriptions (53%).
- However, only one third of companies have a policy in place for welcoming and integrating new workers (37%), a hiring contract (33%) or a formal recruiting plan (33%).
- A greater number of larger companies (15 employees or more) or of companies where between 1% and 49% of employees have few or no qualifications use all these recruiting tools.

6. Recruiting

Figure 13 – Interest in cooperating with employers who have different hiring seasons to fill seasonal positions (n=90)



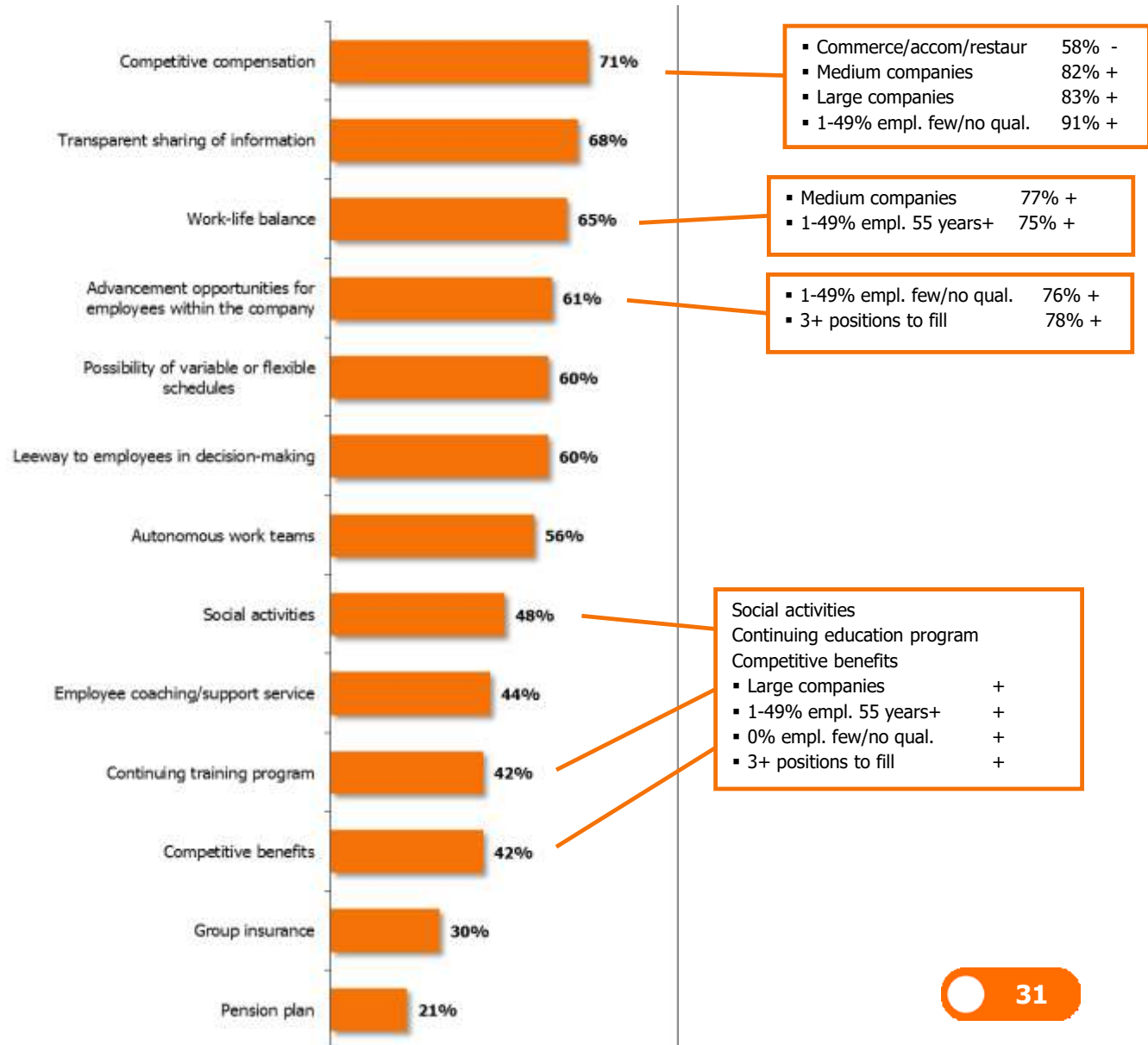
Excludes *Don't know* and *Non applicable* responses.

- Over half the companies that hire seasonal workers (54%) would be interested in cooperating with other companies that have different hiring seasons to fill seasonal positions.

7. Retaining workers

Figure 14 – Practices to help retain workers (n=198)

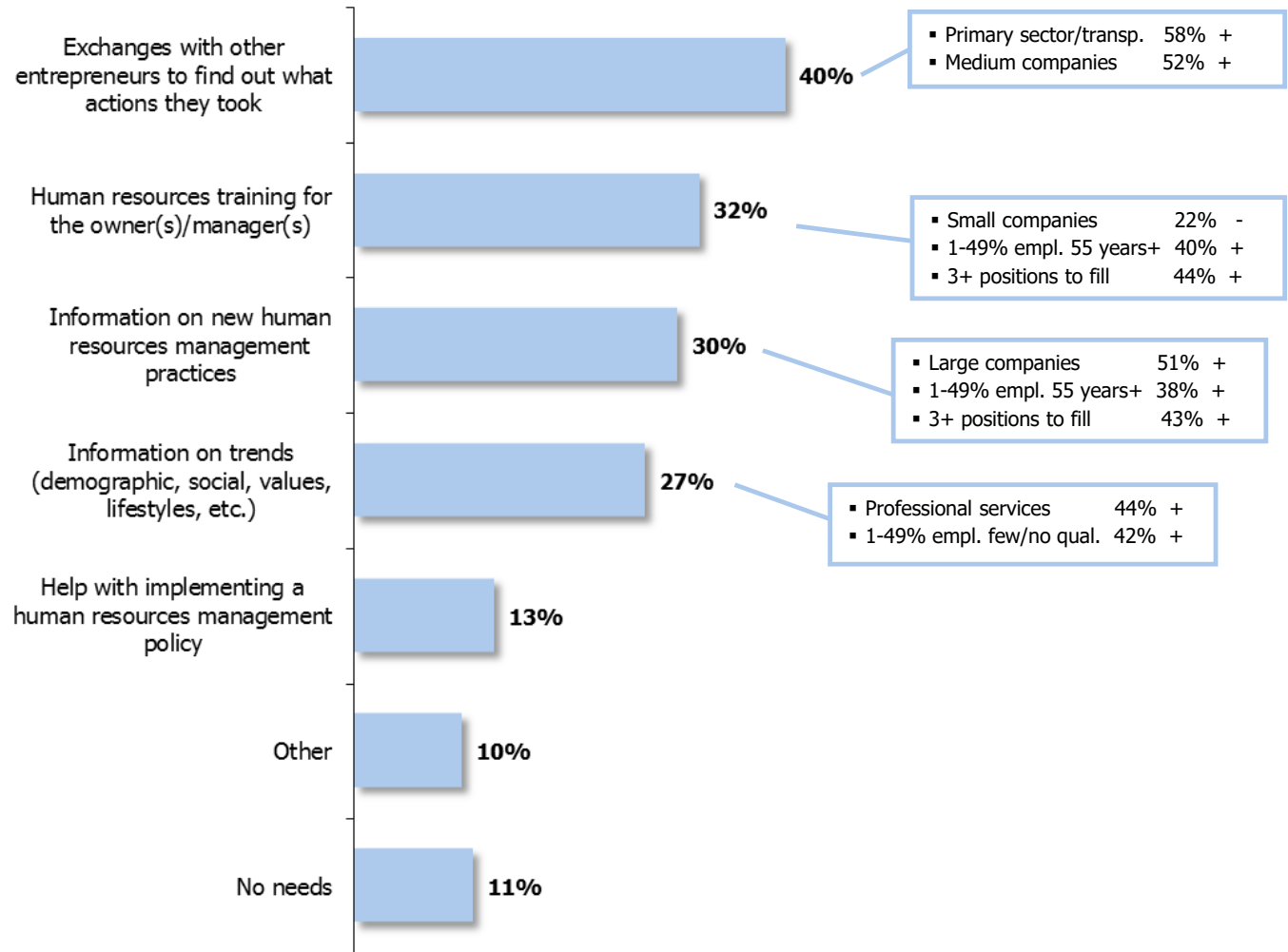
- The main strategies used to help retain employees are competitive compensation (71%), sharing information transparently (68%) and supporting life-work balance (65%).
- Companies also count on helping employees progress (61%), offering flexible schedules (60%) and giving leeway in decision-making (60%).
- The larger the company, the more advantages it offers: training, good compensation, benefits, social activities, etc.



7. Retaining workers

Figure 15 – Support needed by companies to help recruit and retain workers (n=198)

- In order to help them in their efforts to recruit and retain employees, companies would like to exchange ideas with other entrepreneurs (40%) to find out what they have done about it.
- Other needs cited were obtaining human resources training (32%), and information on new practices in this field (30%) and on general trends (27%).



8. Owner succession

Respondent profiles (n=250)

Figure 16 – Gender of owners

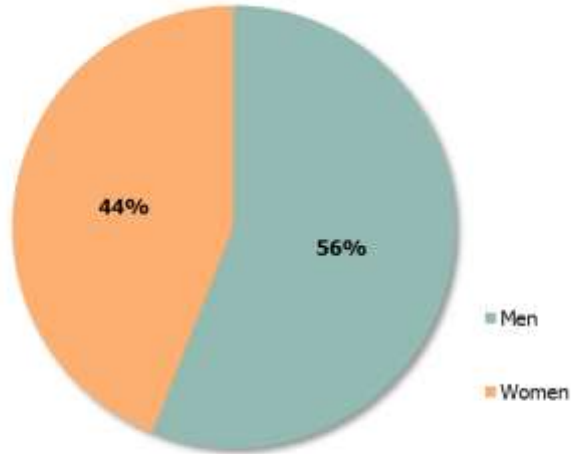
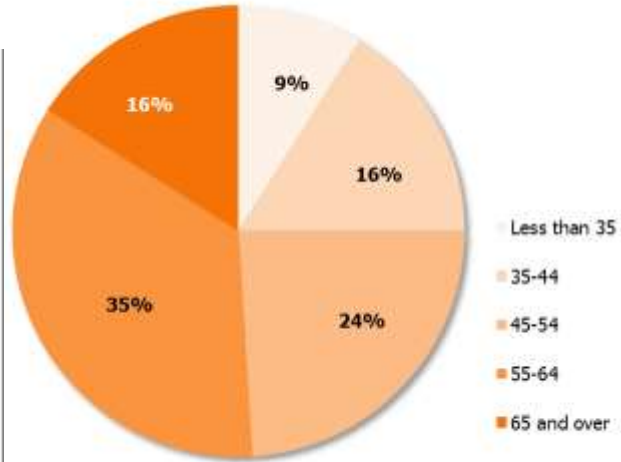


Figure 17 – Age of owners



- Approximately half of respondents were men (56%), 55 years of age or older (51%), owners for more than 15 years (51%) and had high school or less (52%).

Figure 18 – Education level of owners

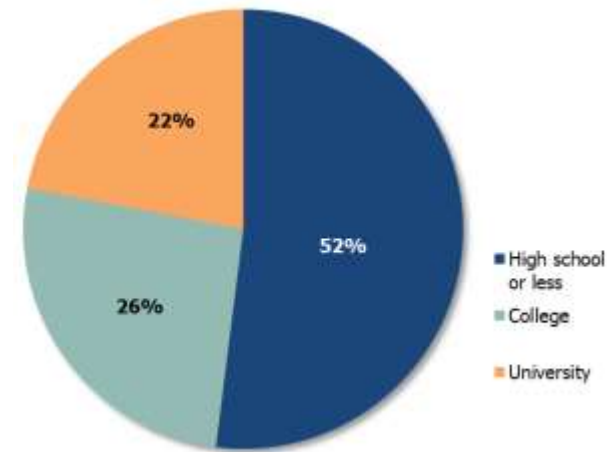
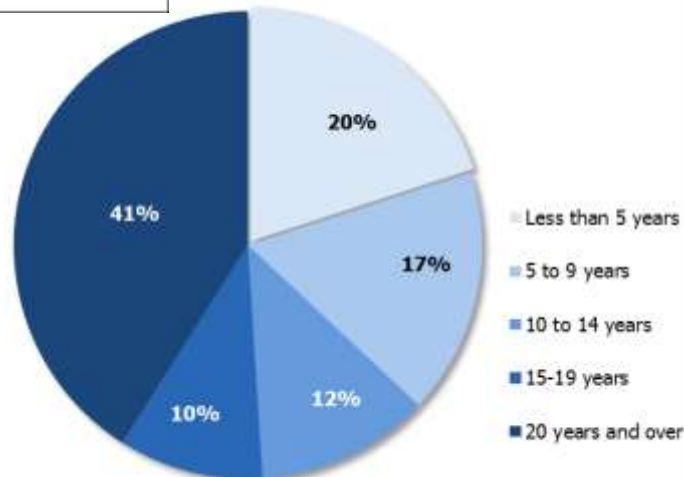
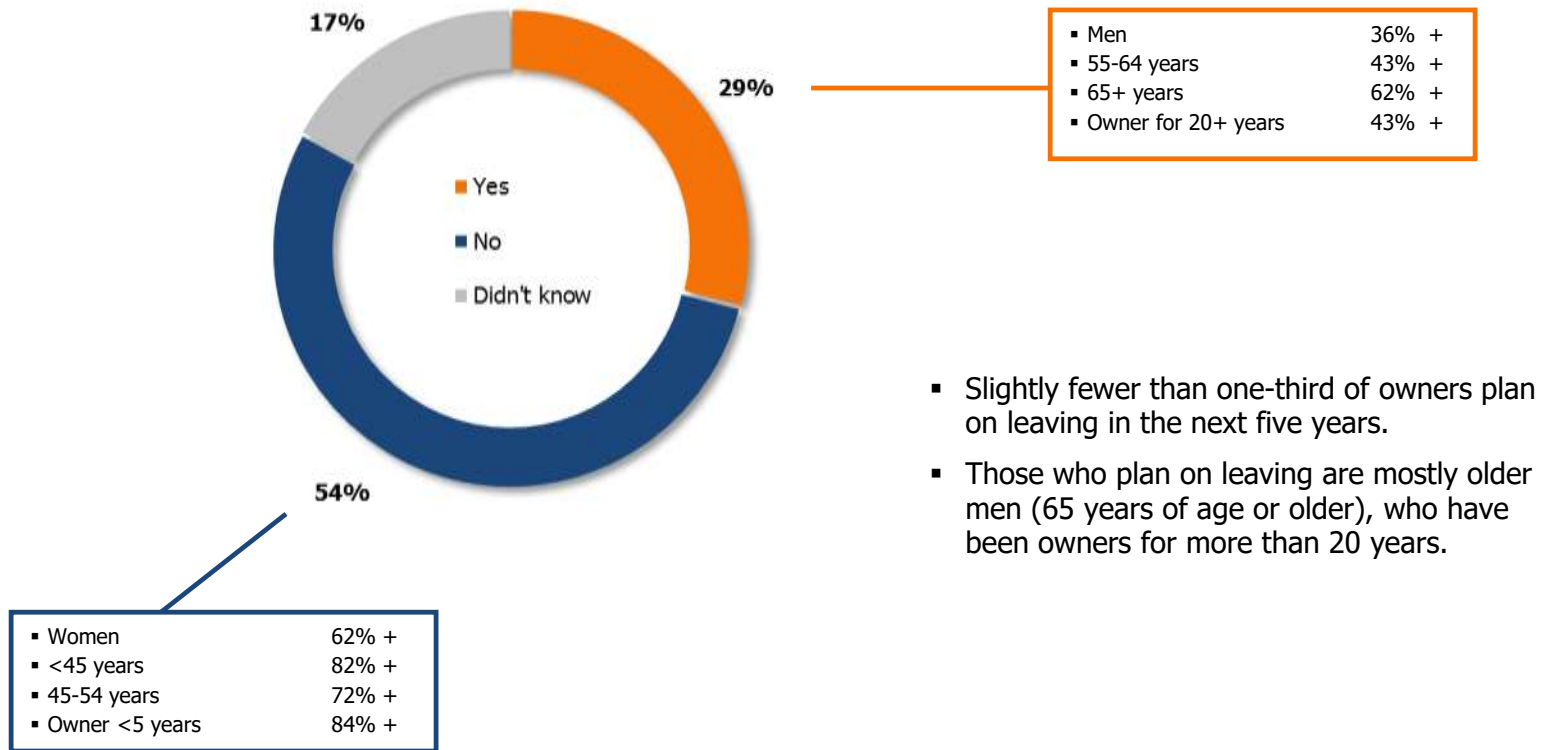


Figure 19 – Number of years of ownership



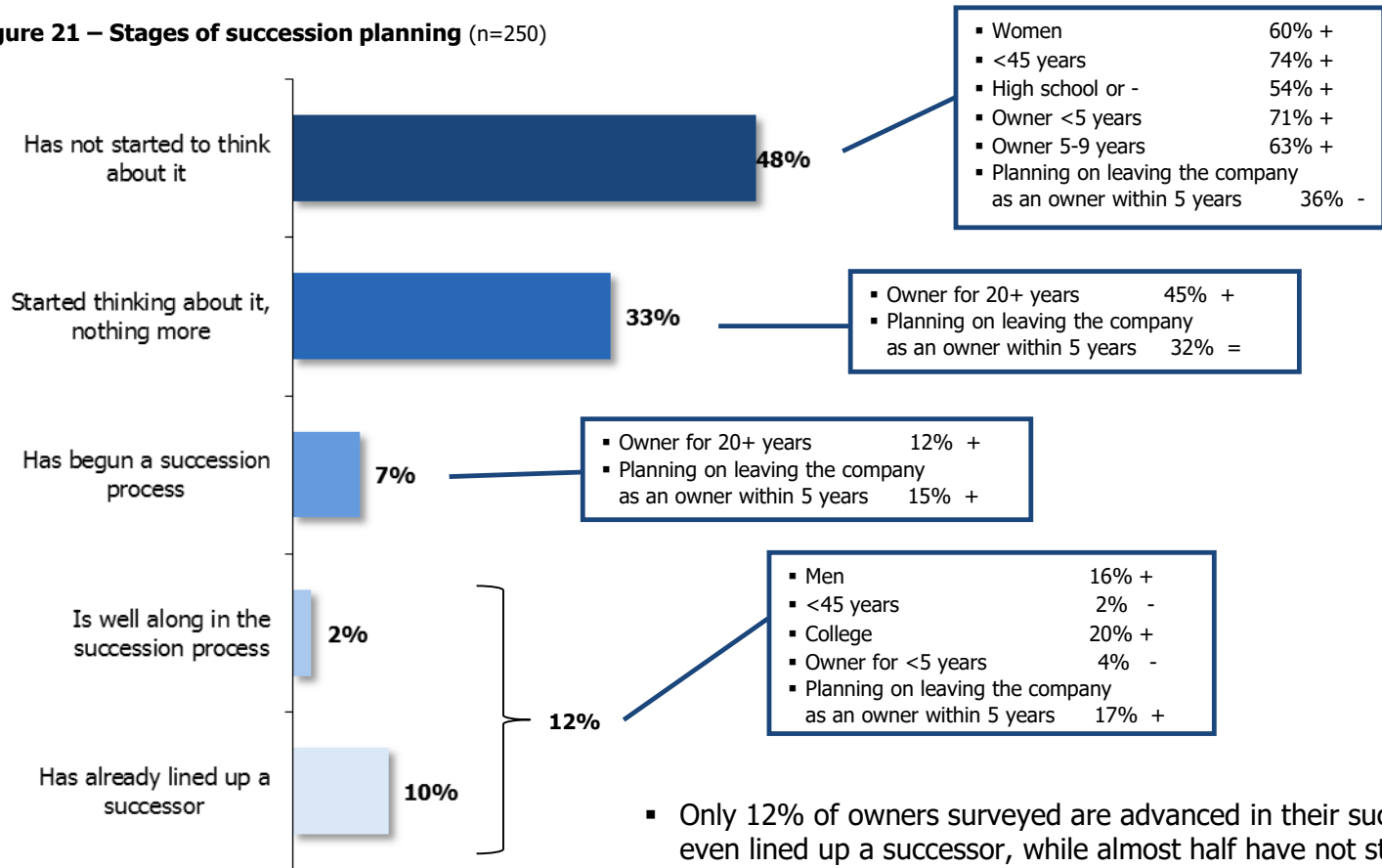
8. Owner succession

Figure 20 – Plan to leave their position as owner in the next five years (n=250)



8. Owner succession

Figure 21 – Stages of succession planning (n=250)



- Only 12% of owners surveyed are advanced in their succession process or have even lined up a successor, while almost half have not started thinking about succession. (48%).
- Predictably, the largest number of respondents who have begun the succession process or started thinking about succession are those who have been owners for over 20 years.
- Owners who plan on leaving their position in the next five years are more advanced in their planning process.

8. Owner succession

Figure 22 – Particular concerns or challenges related to succession planning (n=46*)

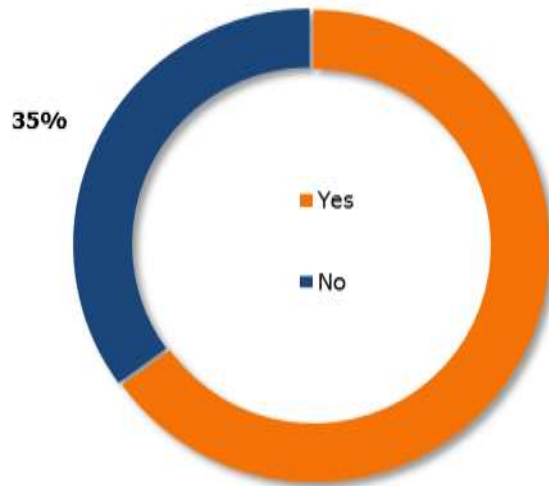


Table 18 – Particular concerns or challenges related to succession planning (n=30)

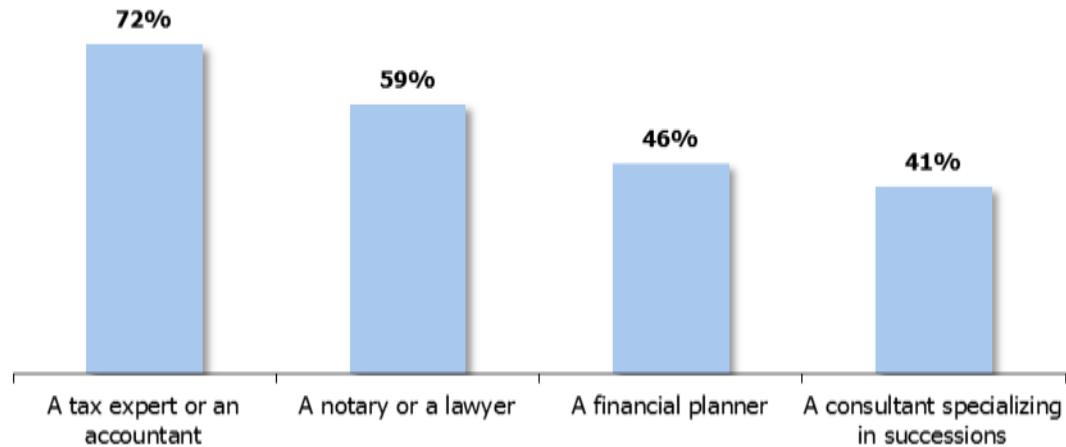
Financial planning	33%
No succession	23%
Seeking purchaser/financing from purchasers	17%
Family challenges	13%
Other	13%
Did not know/refused to answer	17%

- Two-thirds of those owners who plan on leaving their company in the next five years and who have started thinking about succession claim to be facing particular issues or challenges, such as finding a buyer, financial challenges, family challenges, etc.

**Base of respondents: Respondents are owners who plan on leaving their position as company owner in the next five years (72, or 29% of 250, see Figure 20 on page 34) AND who have at least started thinking about succession (72 minus 26 (36% of 72) who have not given it any thought; see the bubble at the top of Figure 21 on page 35).*

8. Owner succession

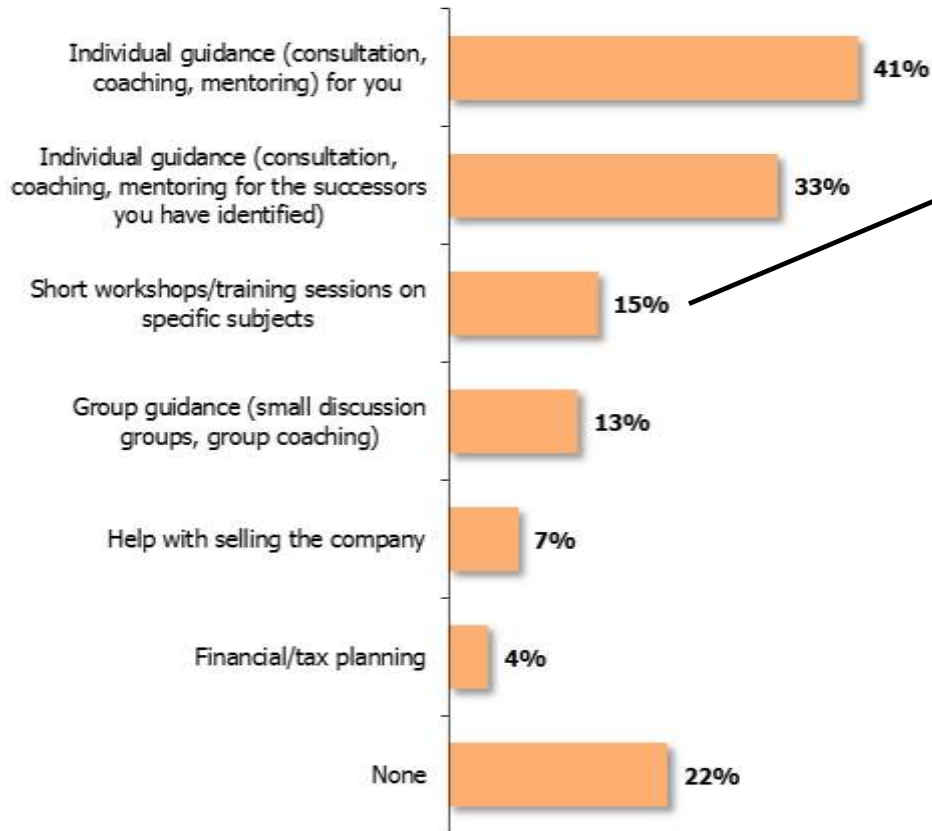
Figure 23 – Have contacted or plan on contacting the following resources regarding succession planning (n=46)



- Most owners who plan on leaving their company in the next five years and have started thinking about succession have contacted or plan on contacting a tax attorney or accountant (72%), or a notary or lawyer (59%). Less than half have contacted or plan on contacting a financial planner (46%) or a succession specialist (41%).

8. Owner succession

Figure 24 – Desired support with regards to succession planning (n=46)



Subjects/themes of these workshops or training sessions (n=7)	%
Financial aspect/financial planning/taxation	43%
Other*	72%
Did not know/refused to answer	29%

* Verbatim of answers: "human resources"; "transfer"; "how to find a qualified notary or attorney"; "choosing a good successor" (avoid including emotions); "coaching with regards to managing the sale (how to take all the steps)"

- Respondents would most like to receive individual coaching for themselves (41%) or their successors (33%).
- Those who would like to receive training are most interested in learning about financial planning and taxation.

8. Owner succession

Figure 25 – Knowledge of the company’s market value (n=46)

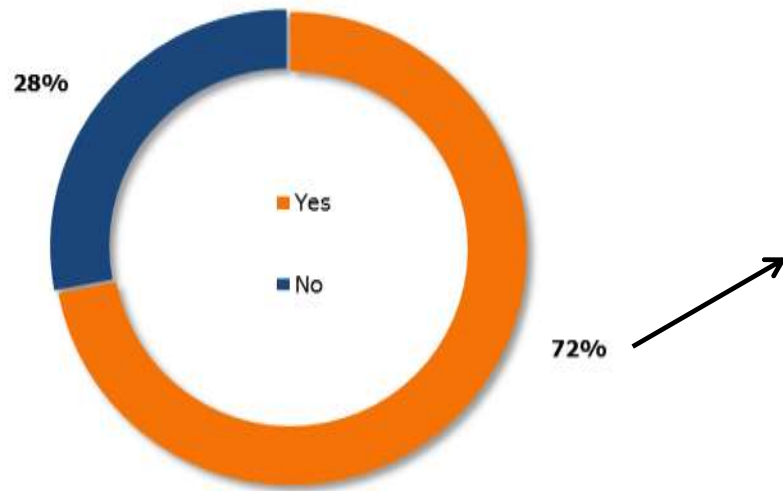


Table 19 – Basis for the market value of a company (n=33)

Market value	76%
Book value	52%
The amount needed for your retirement	6%
Other	9%

- Close to three-quarters of owners who plan on leaving their company in the next five years and have started thinking about succession claim to know its market value. This value is mostly based on the market value (76%) or the book value (52%).

Appendix – Verbatim accounts

Table 15 – Reasons why recruiting the employees that were hired was difficult

Verbatims of “other” answers (n=4)

- “Competition from outside the region.”
- “Expensive specialized training for the future employee.”
- “Because we have a subsidy from Emploi-Québec and their requirements really hamstringing us with regards to labour.”
- “There is no place where people can live. Everybody goes to the city. Housing is difficult.”

Table 16 – Reasons why recruiting the employees that were hired was easy

Verbatims of “other” answers (n=5)

- “We were the creators.”
- “It depends on the type of labour, non-specialized that requires mobility, but nothing complicated.”
- “Depending on his availability because his schedule doesn’t always work with mine.”
- “Recruiting the last employee was easy because he lives near Bouchette and came here for an internship.”
- “No one is interested in seasonal or weekend work.”

Table 18 – Concerns or challenges with regards to succession planning

Verbatims of “other” answers (n=4)

- “Recruiting (e.g.: an experienced butcher would be appreciated)”
- “Because of the size of the store/the factors to contend with, and just working in there is difficult. Paperwork takes up a lot of energy.”
- “It’s vital to have strong physical and management skills, to be knowledgeable and more vigilant and to know the issues.”
- “That both parties (assigner and successor) be totally satisfied.”