

2022 Manitoba Business Outlook Survey

Methodology

METHODOLOGY

The Manitoba Chambers of Commerce (MCC) retained Leger to conduct the 5th annual Manitoba Business Outlook survey of its members and partners. The primary purpose of the research was to provide MCC statistically reliable feedback from Manitoba businesses that can be used to develop policies and positions to approach the various levels of government on their behalf for effective recovery strategies and support.

Leger professionals worked with MCC in designing the survey instrument. MCC provided an initial outline of questions and topic areas for inclusion in the study which Leger crafted into a methodological sound questionnaire. The questionnaire consisted of approximately 35 questions, along with about 20 questions from the project sponsor organizations. In total, the survey took approximately 15 minutes to complete.

The survey was hosted on the Leger's web server to ensure confidentiality and anonymity of responses. Leger was responsible for the distribution of each member's unique survey link, which ensured that members were not able to complete the survey more than once. In addition, a separate open link was also generated to allow the survey to be shared with other business partners. Throughout the process, Leger maintained respondent confidentiality.

MCC provided the contact information for its members and also shared an open link with partner organizations to encourage survey responses. From these sources, 379 Manitoba business decision-makers successfully completed the survey. Since much of the research was conducted from a list database, the sample is considered to be non-probability and therefore, margins of error are not applicable. For contextual purposes, a probability sample of a survey size of 379 cases with this sample frame theoretically carries a confidence interval of approximately +/- 4.7 percent, 19 times out of 20.

A pre-test of the survey was conducted November 23rd, 2022. After the test, the survey tool was available online from November 29th through December 16th, 2022. A total of 3 reminder emails were sent to members during the data collection period. MCC also encouraged survey participation.

If you have questions about the data presented in this report, please contact **Andrew Enns**, Executive Vice President, at the following email address: aenns@leger360.com

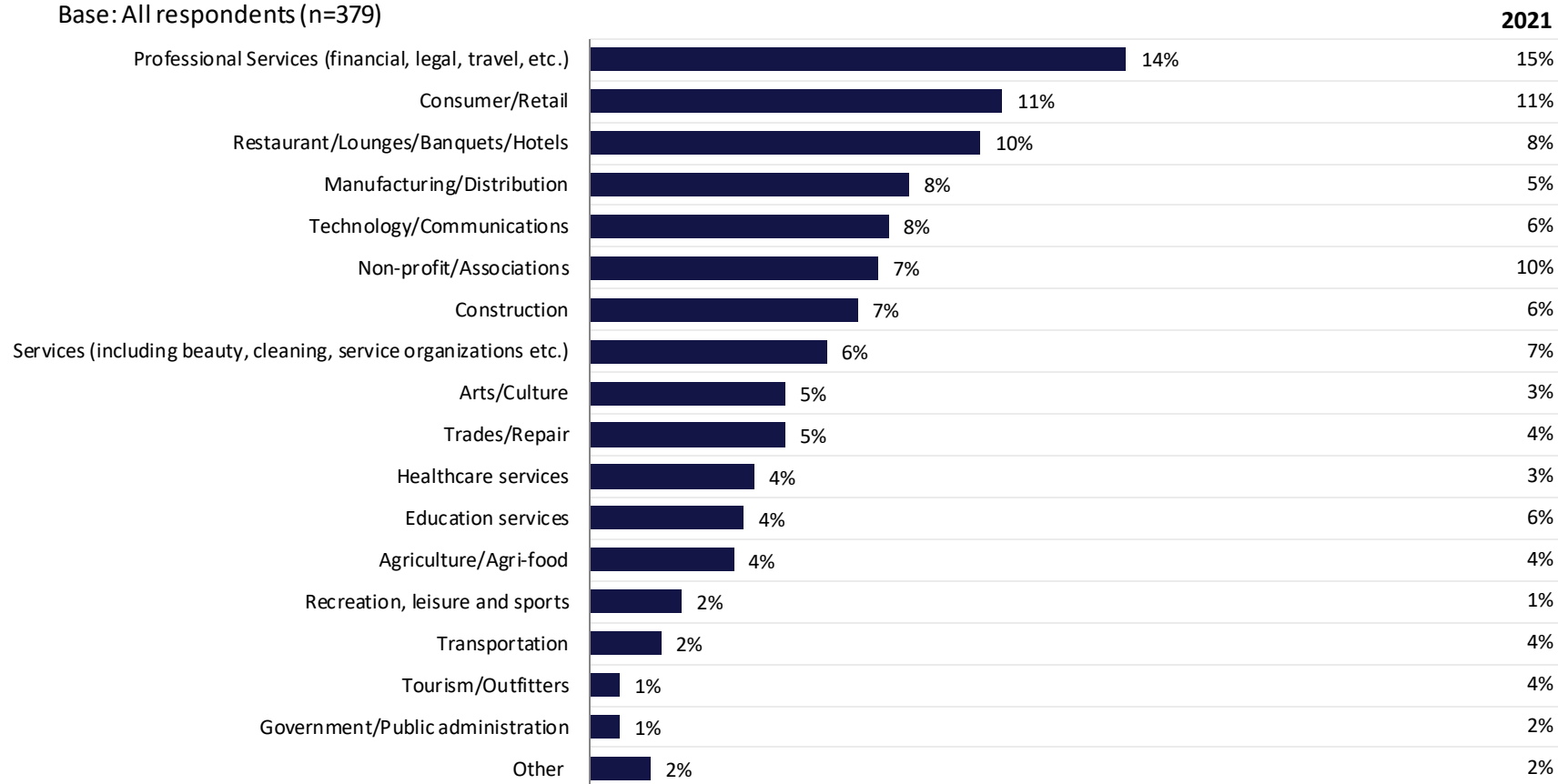
SURVEY RESPONDENT PROFILE

Variable	% of n=379 (2022)	% of n=419 (2021)	Variable	% of n=379 (2022)	% of n=419 (2021)	Variable	% of n=379 (2022)	% of n=419 (2021)
<u>Region</u>			<u>Employee Size – Full Time</u>			<u>Employee Size – Part Time</u>		
Winnipeg	46	54	0 to less than 10	33	32	0 to less than 10	47	45
Northern Manitoba	17	10	10 to less than 50	21	17	10 to less than 50	20	12
Eastern Manitoba	14	11	50 to less than 100	9	6	50 to less than 100	5	3
Western Manitoba	17	17	100+	14	29	100+	5	23
Southern Manitoba	6	8	Unsure/No answer	22	16	Unsure/No answer	22	16
Winnipeg	46	54	<u>Head Office Location</u>			<u>Unionized</u>		
Non-Winnipeg	54	46	Manitoba	65	81	Yes	33	30
			In Canada	32	16	No	59	66
			Outside Canada	3	2	Unsure/No answer	8	4

SURVEY RESPONDENT PROFILE

QIND: Principal Business Type

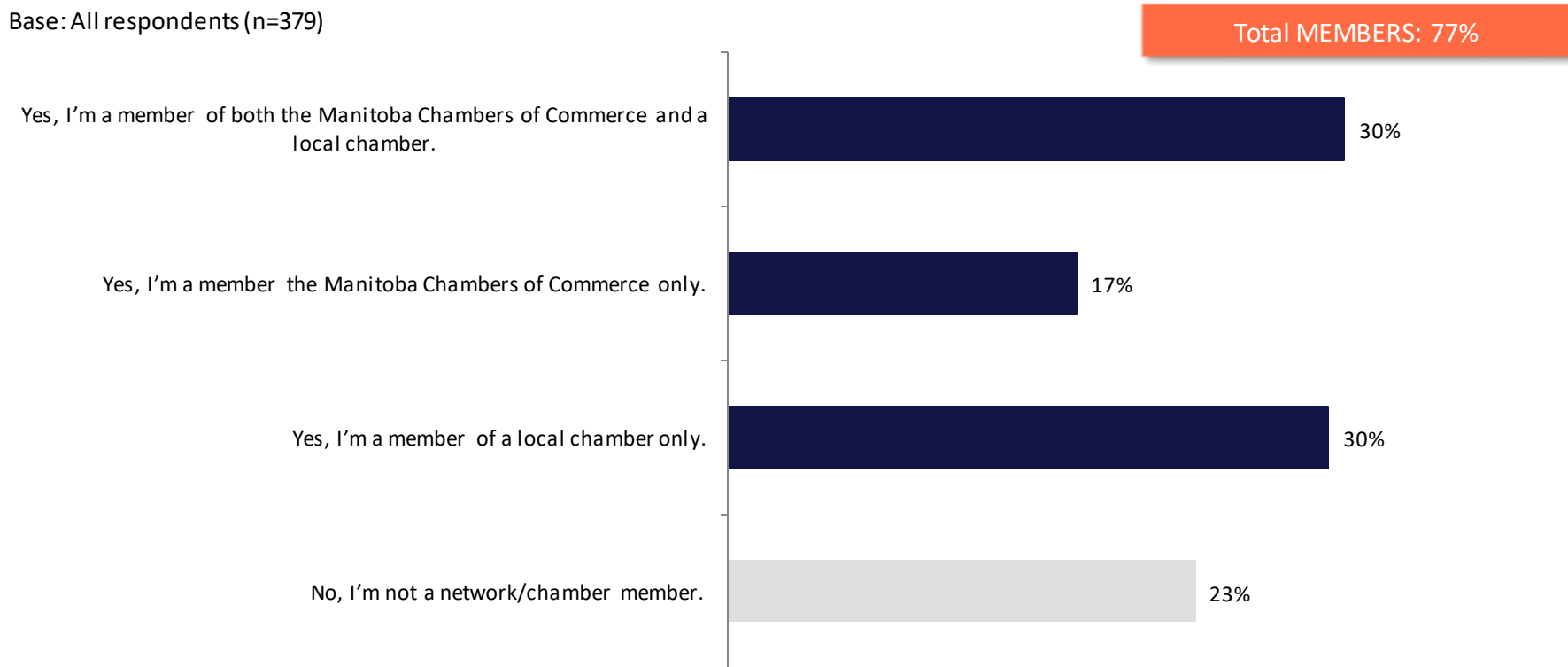
Base: All respondents (n=379)



SURVEY RESPONDENT PROFILE

Q29: The Manitoba Chambers of Commerce is the umbrella organization for 64 local chambers of commerce in the province. Are you/your organization a direct member of the MCC and/or a local chamber?

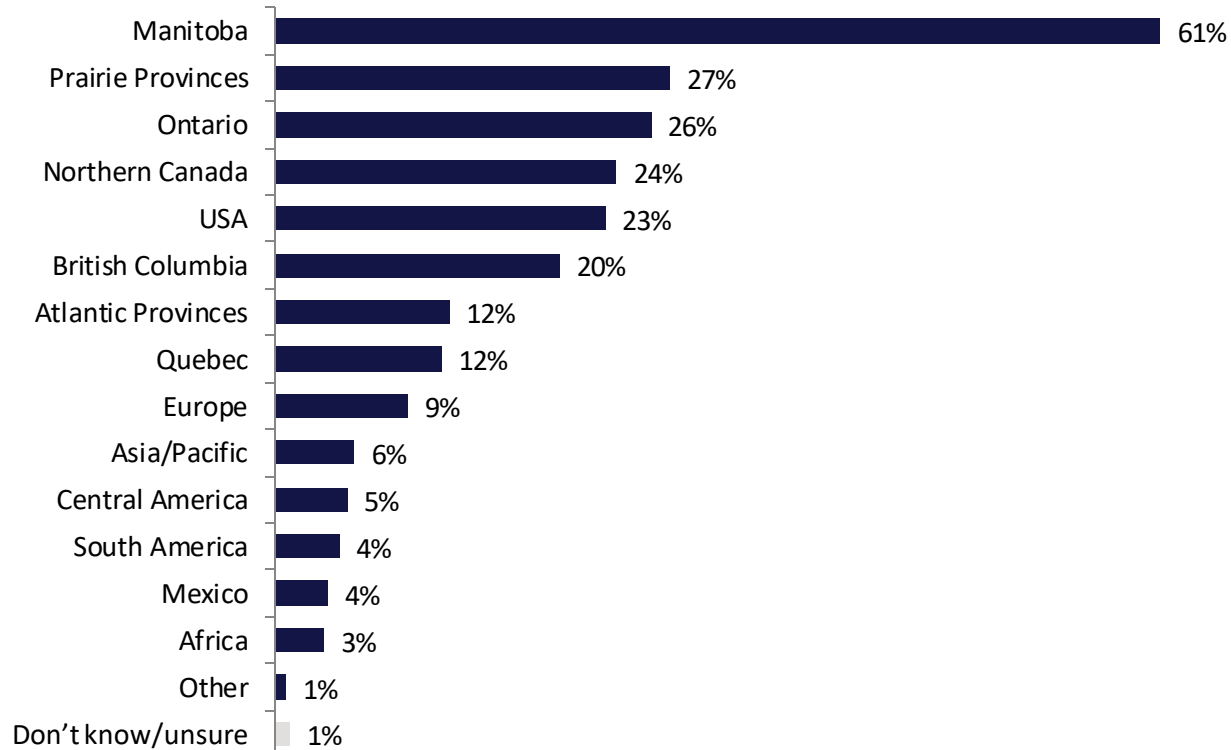
Base: All respondents (n=379)



SURVEY RESPONDENT PROFILE

Q5T: Where do you currently conduct business?

Base: All respondents (n=379)



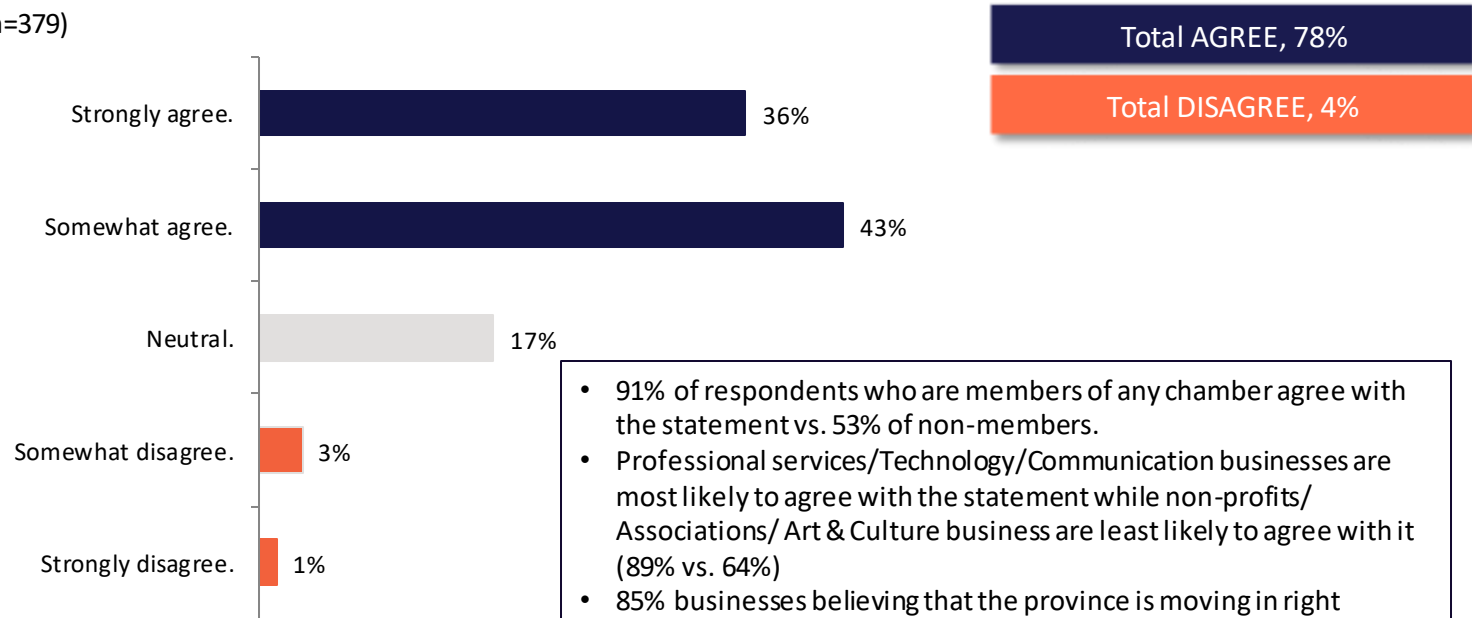
Research Findings

Impression of the Chambers

MCC as the Voice of Business

Q30A: How strongly do you agree or disagree with the following statements: The Manitoba Chambers of Commerce is the Voice of Business in Manitoba

Base: All respondents (n=379)

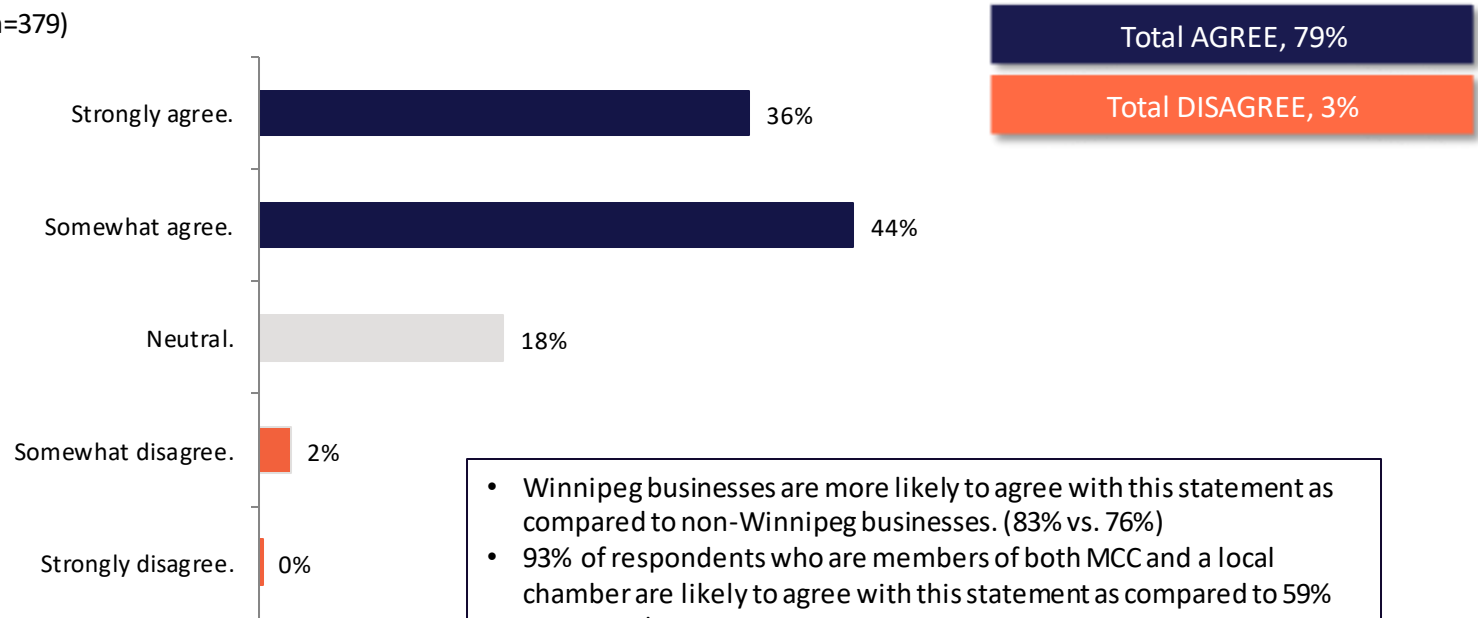


- 91% of respondents who are members of any chamber agree with the statement vs. 53% of non-members.
- Professional services/Technology/Communication businesses are most likely to agree with the statement while non-profits/Associations/ Art & Culture business are least likely to agree with it (89% vs. 64%)
- 85% businesses believing that the province is moving in right direction agree with the statement, vs. 68% of business are not very optimistic about the province's economic conditions.
- 88% of large businesses agree with statement vs. 78% small business

MCC as Source of Timely Information

Q30B: How strongly do you agree or disagree with the following statements: The Manitoba Chambers of Commerce provides relevant, timely information to Manitoba's business community.

Base: All respondents (n=379)

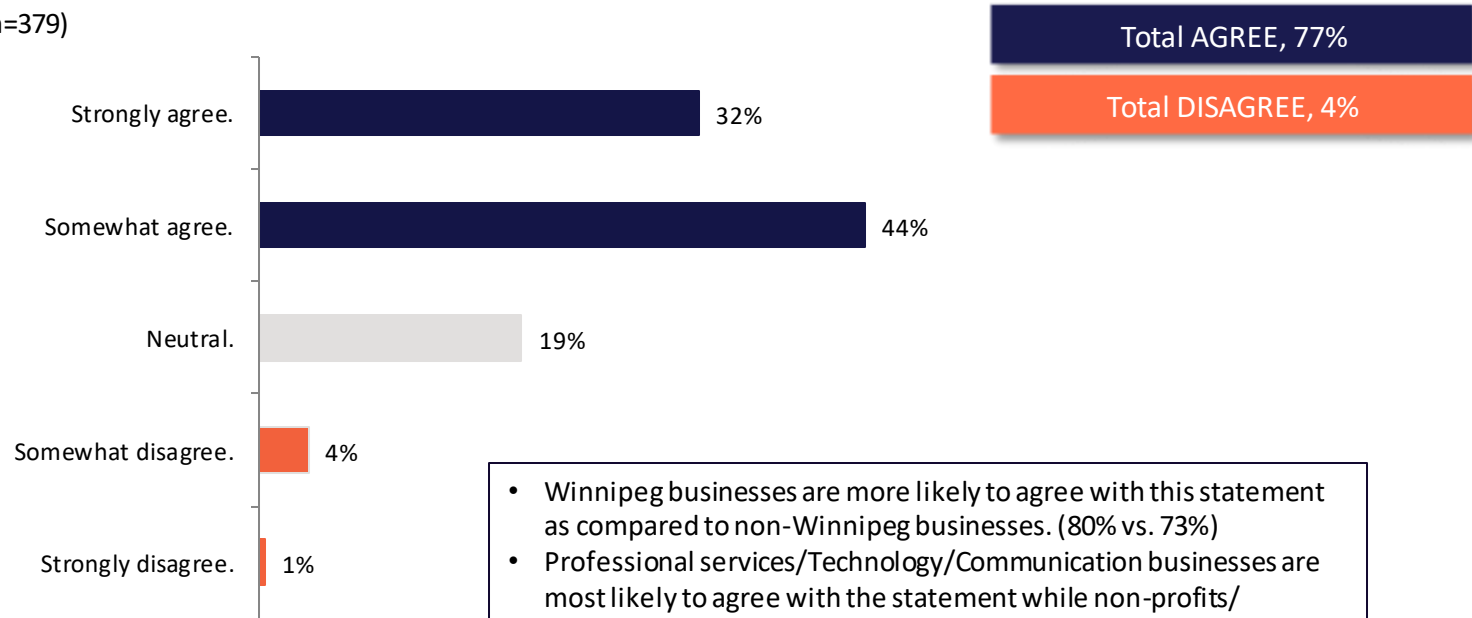


- Winnipeg businesses are more likely to agree with this statement as compared to non-Winnipeg businesses. (83% vs. 76%)
- 93% of respondents who are members of both MCC and a local chamber are likely to agree with this statement as compared to 59% non-members.
- 86% businesses optimistic about the economic conditions of the province agree with this statement.

Relevance of MCC work to Business Community

Q32: How strongly do you agree or disagree with the following statements: The Manitoba Chambers of Commerce’s policy and advocacy work focuses on pertinent and timely issues that are relevant to Manitoba’s business community.

Base: All respondents (n=379)



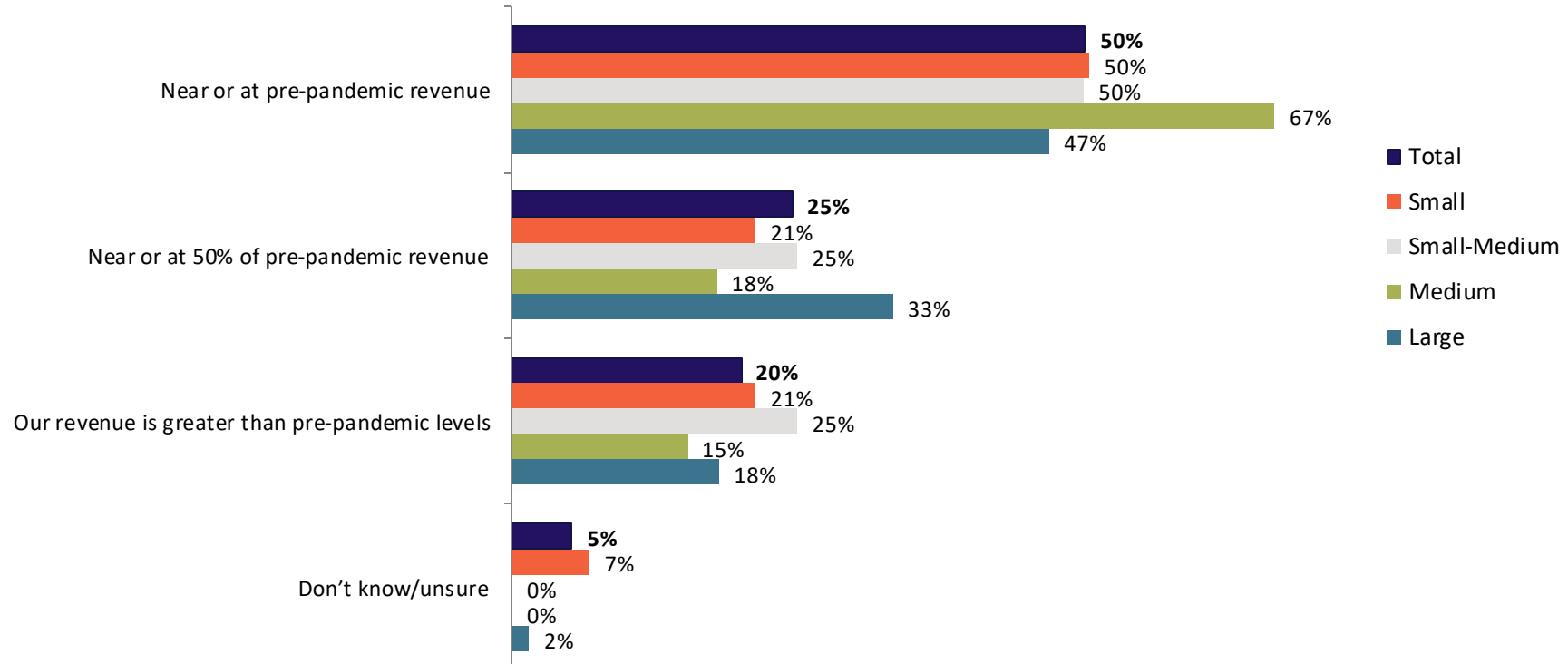
- Winnipeg businesses are more likely to agree with this statement as compared to non-Winnipeg businesses. (80% vs. 73%)
- Professional services/Technology/Communication businesses are most likely to agree with the statement while non-profits/Associations/ Arts & Culture business are least likely to agree with it (84% vs. 60%)
- 88% MCC or other local chamber members agree with this statement vs. 54% non-members

Economic Resilience & Recovery

Revenue Levels Since Pandemic

Q2RR: At what level is your revenue as compared to pre-pandemic levels?

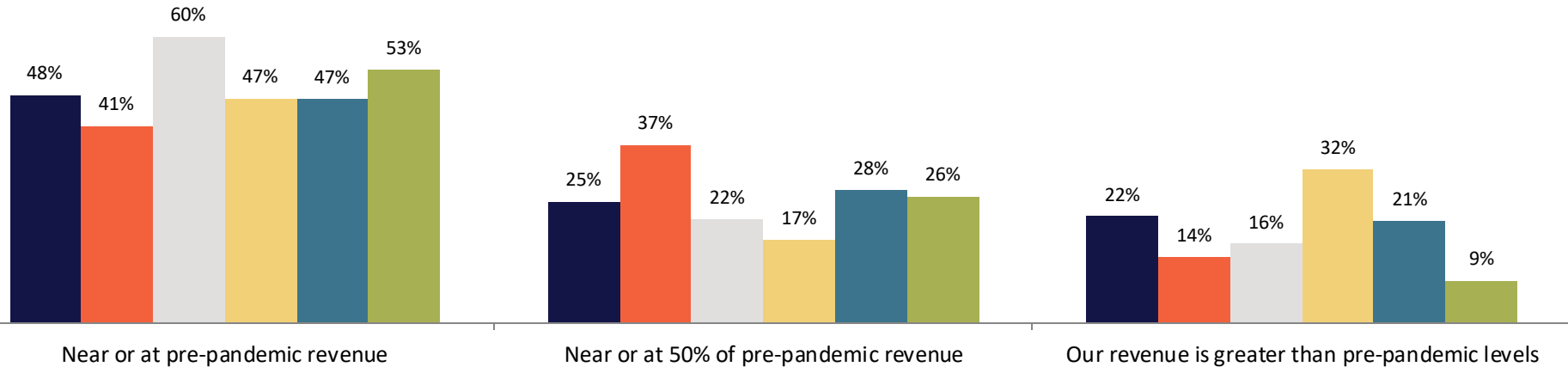
Base: All respondents (n=379)



Revenue Levels Since Pandemic – By Sector

Q2RR: At what level is your revenue as compared to pre-pandemic levels?

Base: All respondents (n=379)



■ Consumer/Retail/Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

■ Restaurant/ Hospitality/ Tourism/ Recreation

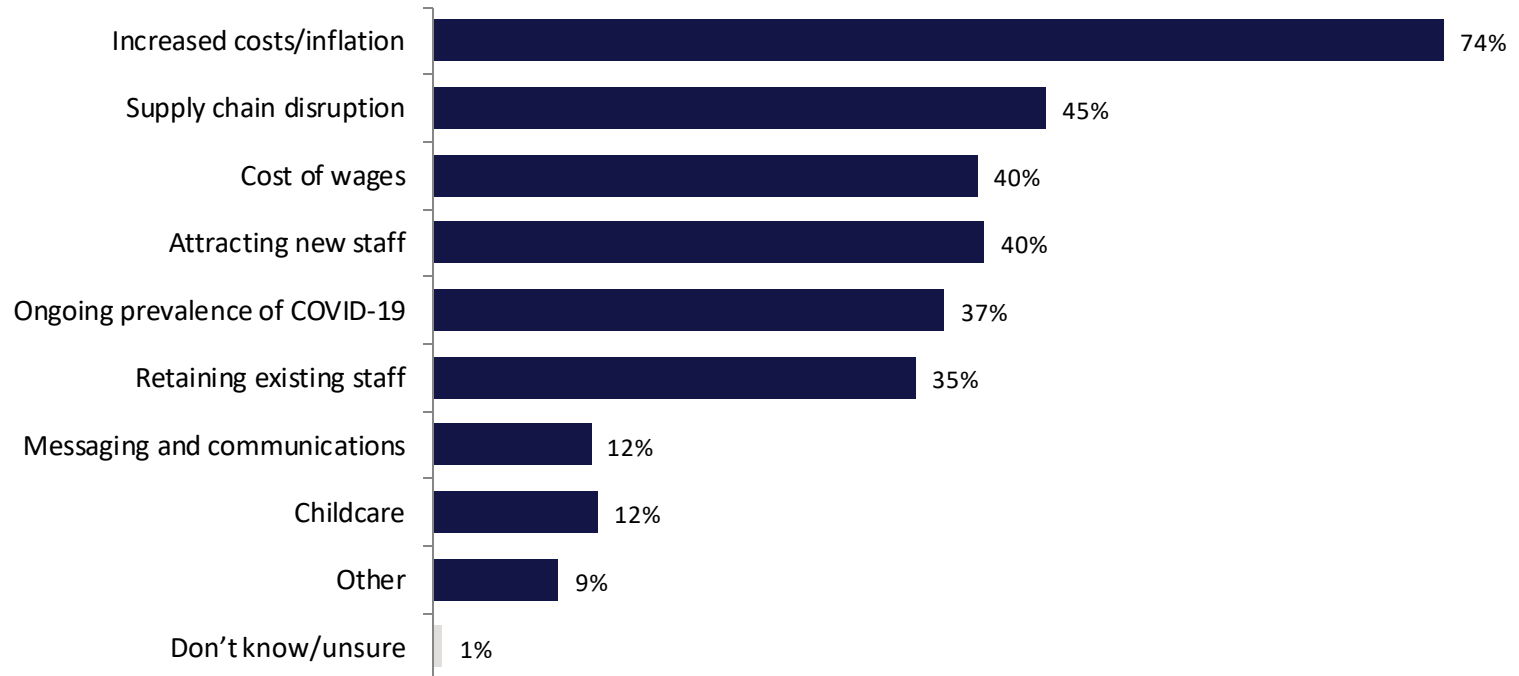
■ Professional Services/ Technology/ Communications

■ Education/ Healthcare/ Government/ Public Admin

Economic Recovery Barriers

Q1RR In your opinion, what are the biggest barriers to economic recovery?

Base: All respondents (n=379)

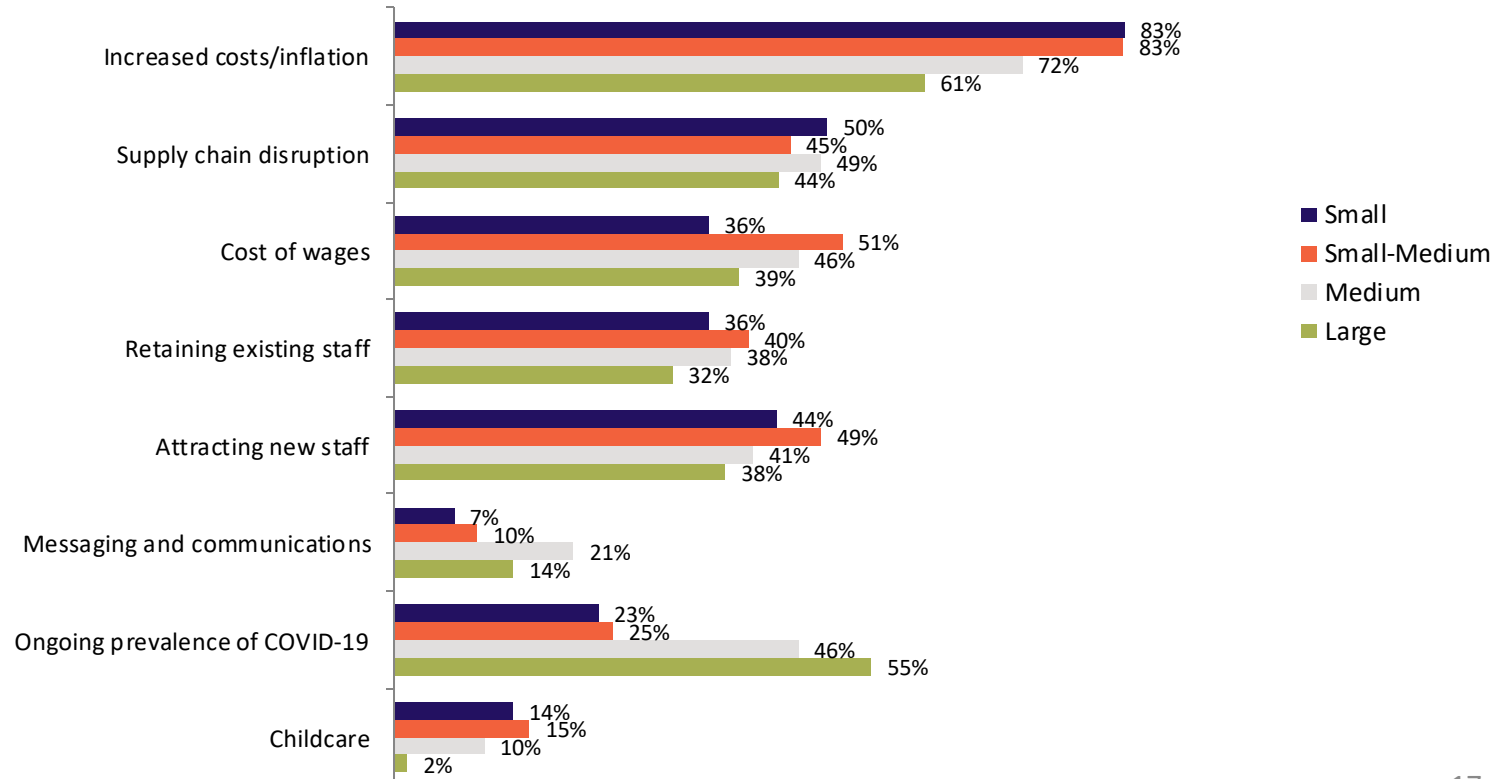


- In 2021, 37% mentioned *restricted spending* and *decrease in sales* as major challenges because of pandemic.
- Messaging and communications is a stronger barrier outside Winnipeg (15% vs 8% in Winnipeg), similarly childcare is more likely to impact business outside Winnipeg (16% vs. 7% within Winnipeg).

Economic Recovery Barriers – By Employee Size

Q1RR In your opinion, what are the biggest barriers to economic recovery?

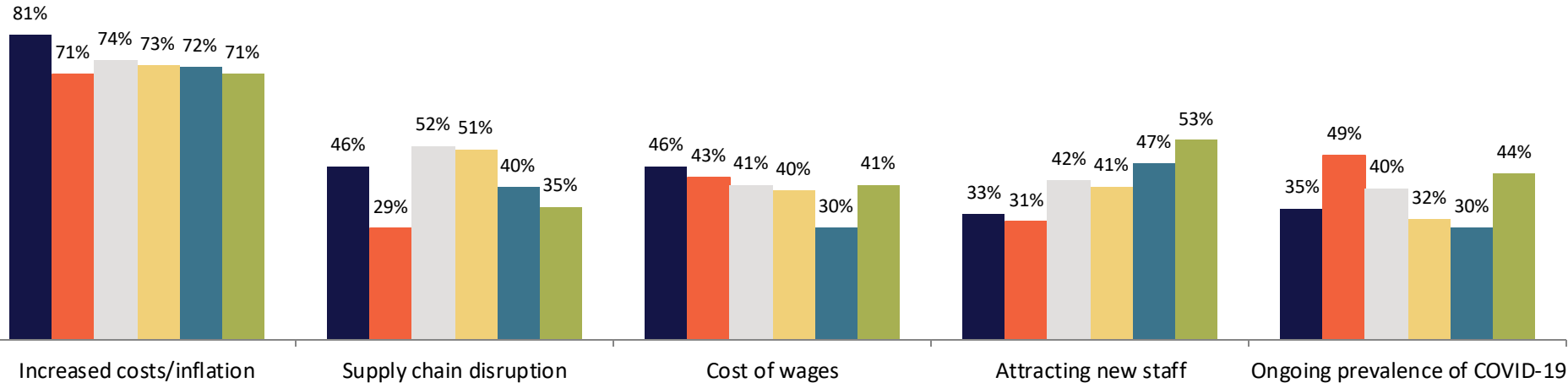
Base: All respondents (n=379)



Economic Recovery Barriers – By Sector

Q1RR In your opinion, what are the biggest barriers to economic recovery? [TOP 5 BARRIERS]

Base: All respondents (n=379)



■ Consumer/Retail/Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

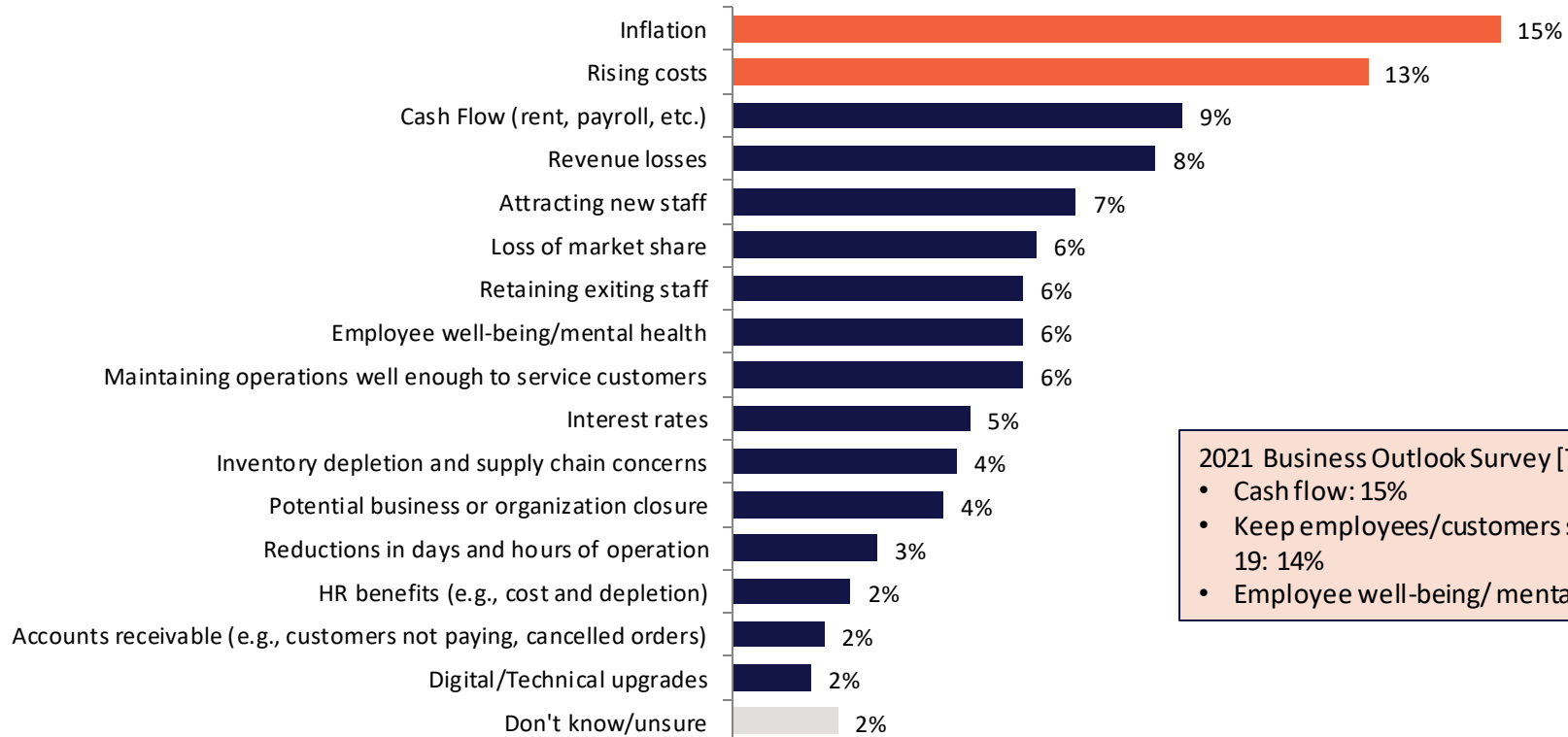
■ Restaurant/ Hospitality/ Tourism/ Recreation

■ Professional Services/ Technology/ Communications

■ Education/ Healthcare/ Government/ Public Admin

Current Business Concerns

Q3. Please rank the items below according to what you are most worried about right now as it relates to the internal operations of your business. [TOP CONCERN] Base: All respondents (n=379)

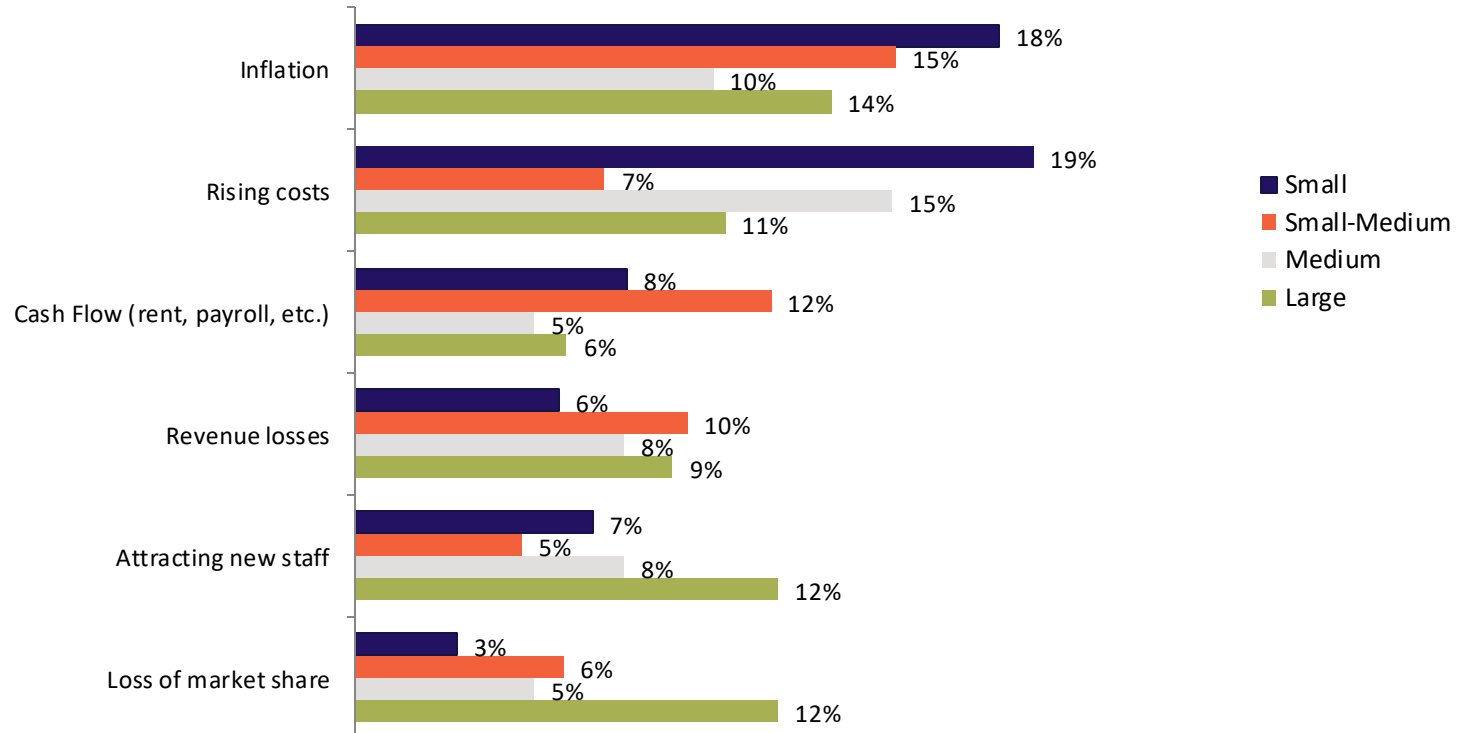


2021 Business Outlook Survey [Top Concerns]:

- Cash flow: 15%
- Keep employees/customers safe from COVID-19: 14%
- Employee well-being/ mental health: 12%

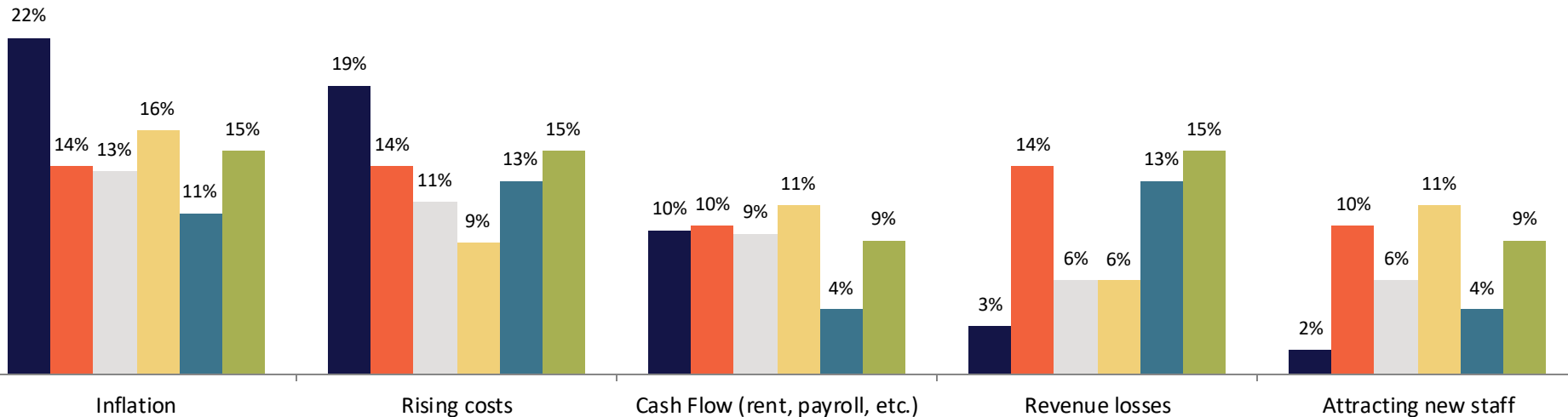
Current Business Concerns – By Employee Size

Q3. Please rank the items below according to what you are most worried about right now as it relates to the internal operations of your business. [TOP CONCERN] Base: All respondents (n=379)



Current Business Concerns – By Sector

Q3. Please rank the items below according to what you are most worried about right now as it relates to the internal operations of your business. [TOP CONCERN] Base: All respondents (n=379)



■ Consumer/Retail/Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

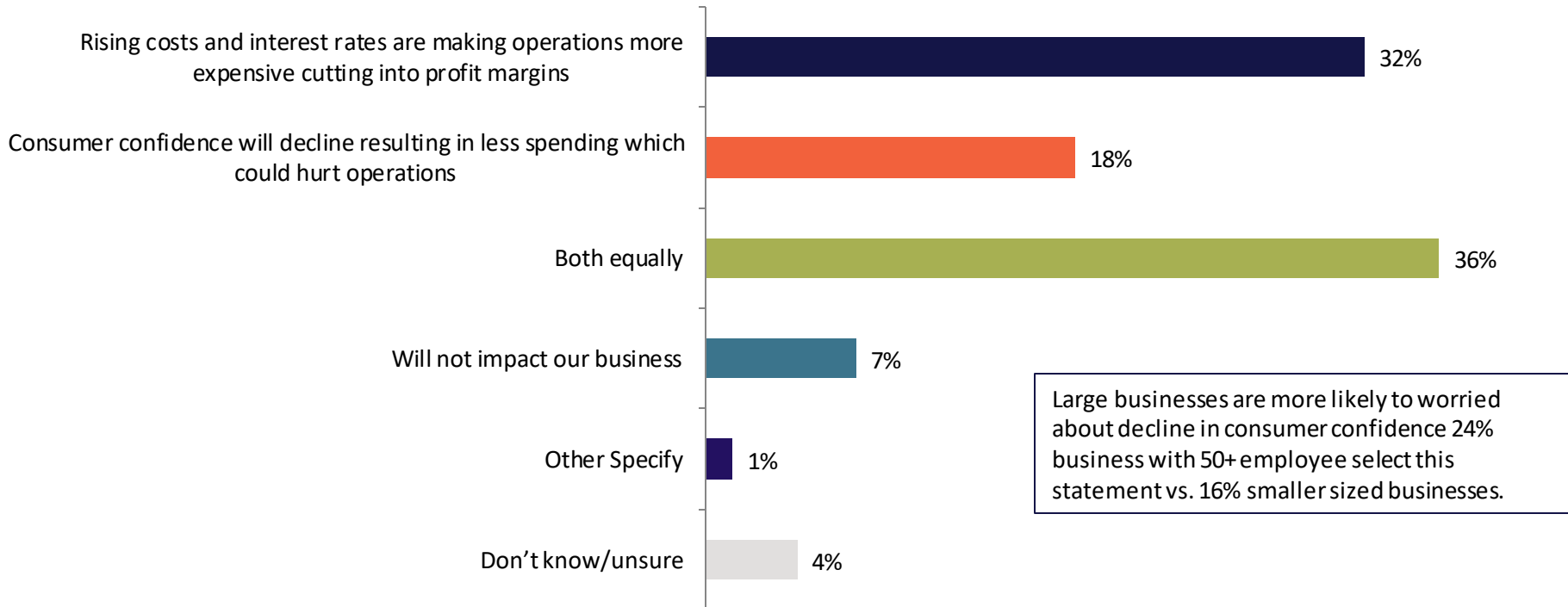
■ Restaurant/ Hospitality/ Tourism/ Recreation

■ Professional Services/ Technology/ Communications

■ Education/ Healthcare/ Government/ Public Admin

Impact of Inflation on Business Operations

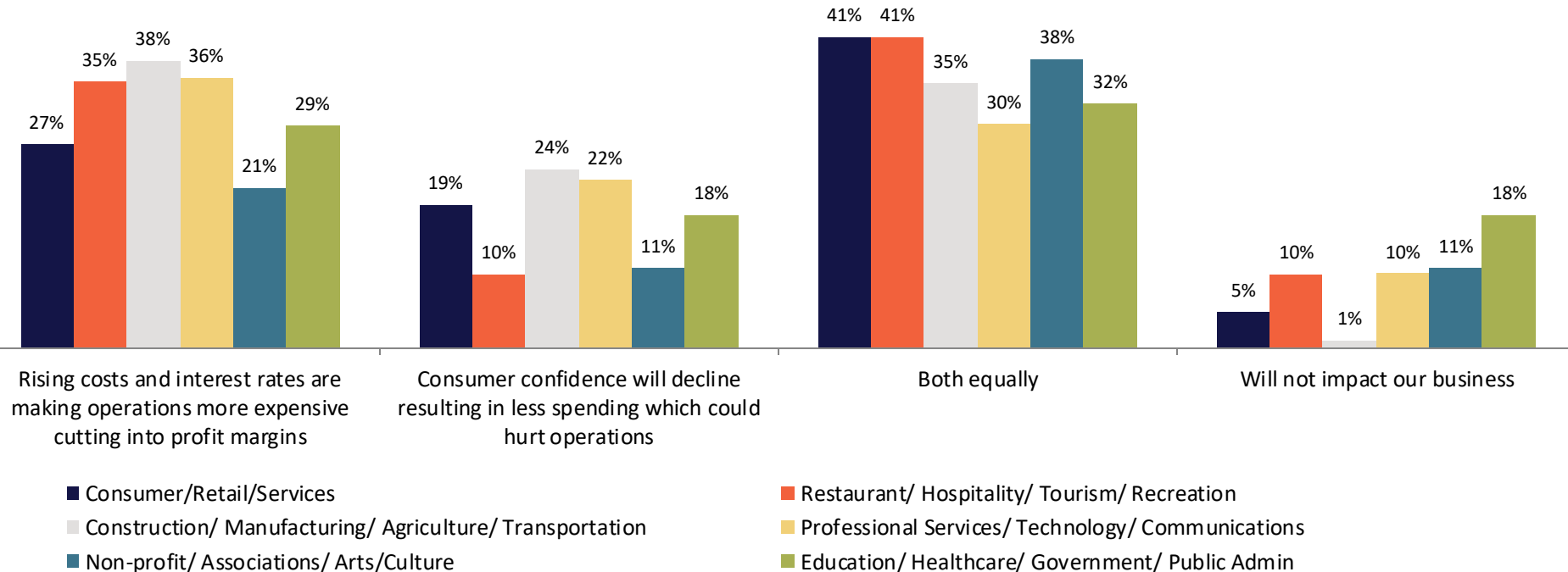
Q1F. The current period of high inflation and increasing interest rates can affect businesses differently. How will these factors most impact your business operations, if at all? Base: All respondents (n=379)



Impact of Inflation on Business Operations – By Sector

Q1F. The current period of high inflation and increasing interest rates can affect businesses differently. How will these factors most impact your business operations, if at all?

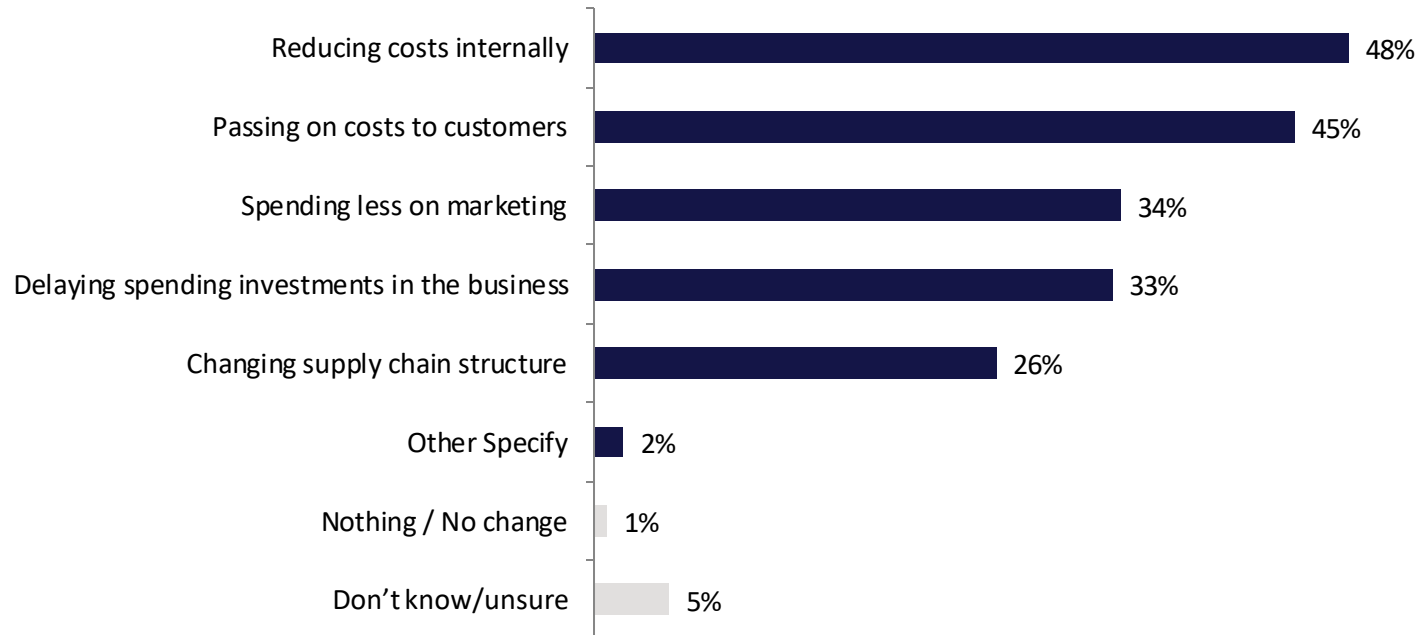
Base: All respondents (n=379)



Actions taken to Combat Inflation

Q2F. What decisions/actions is your organization making in response to inflation?

Base: All respondents (n=379)

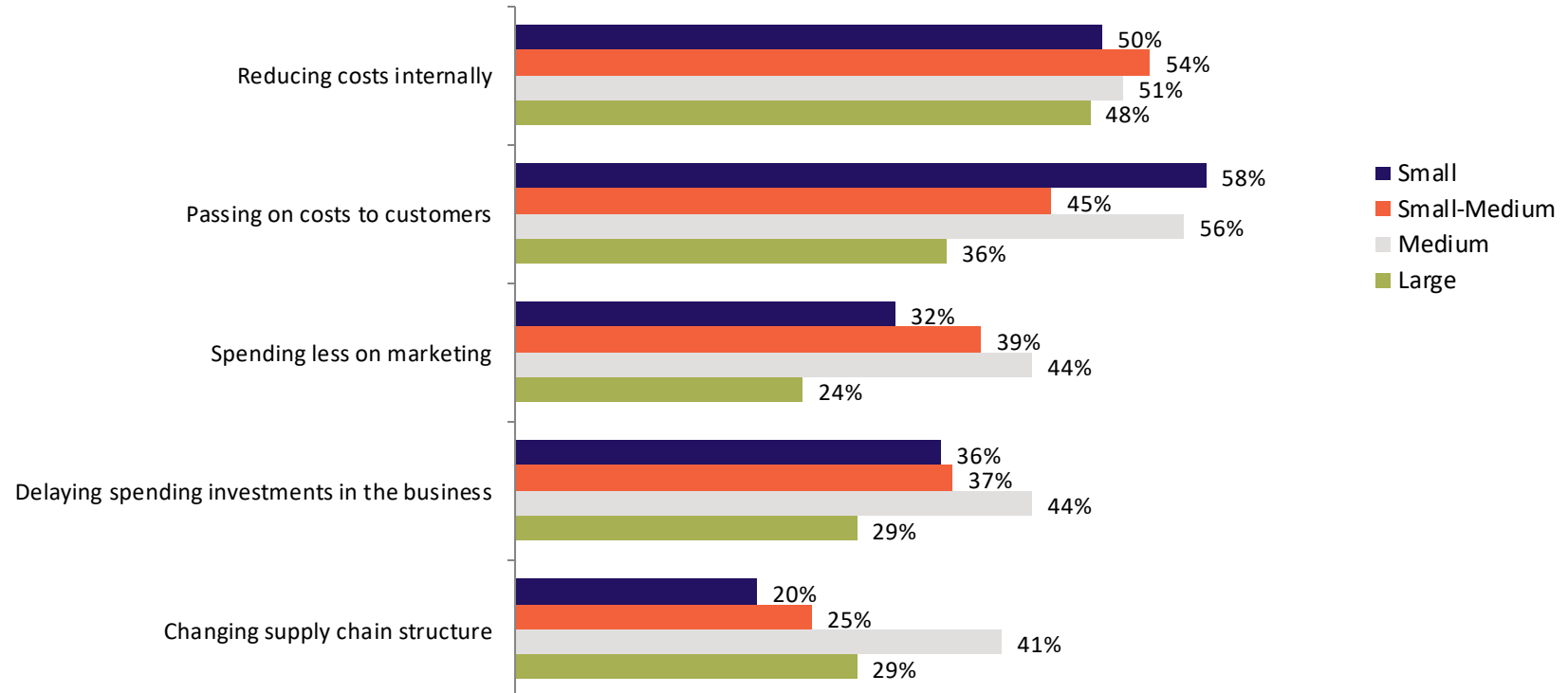


Passing on costs to customers is a more likely an action taken by Winnipeg based businesses (51% vs 40% businesses outside of Winnipeg) and businesses with <50 employees (52% vs. 44% of businesses with 50+ employees).

Actions taken to Combat Inflation – By Employee Size

Q2F. What decisions/actions is your organization making in response to inflation?

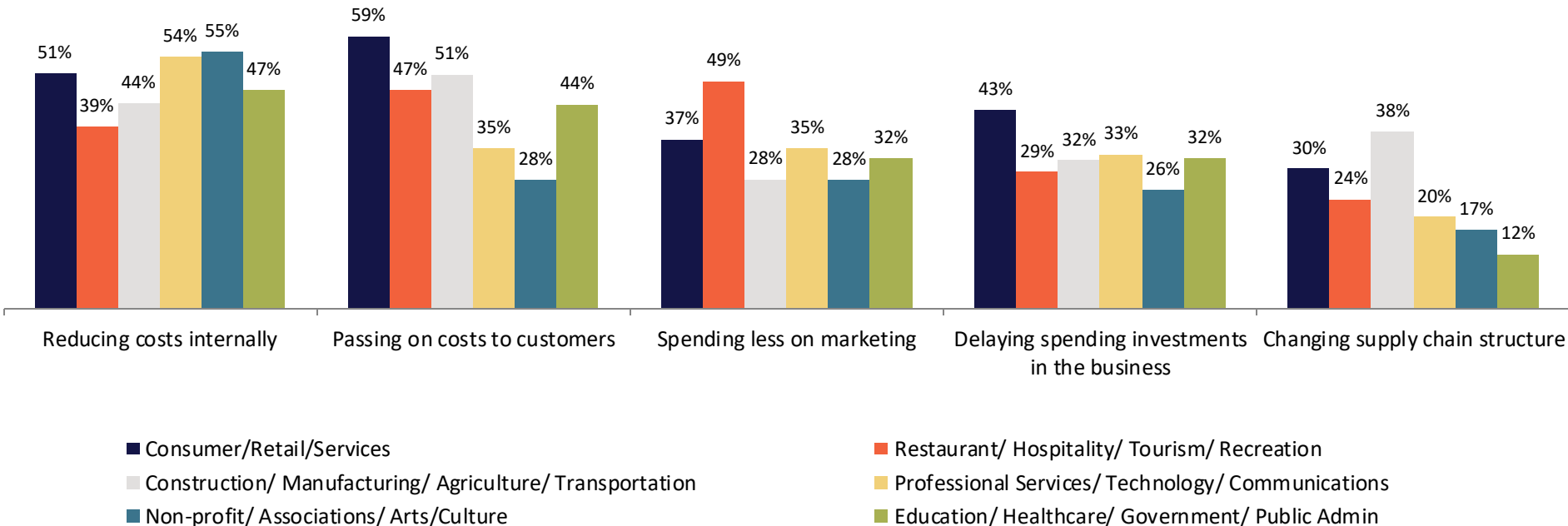
Base: All respondents (n=379)



Actions taken to Combat Inflation – By Sector

Q2F. What decisions/actions is your organization making in response to inflation?

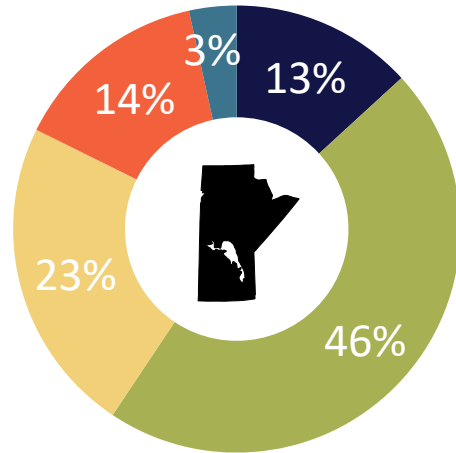
Base: All respondents (n=379)



Managing Economic Recovery –Governments' Response

Economic Recovery Efforts: *Government of Manitoba*

Q4RRr2: The Government of Manitoba - How would you rate the following levels of government in terms of their efforts and commitment to managing economic recovery? Base: All respondents (n=379)



- Very Good Job
- Somewhat good job
- Somewhat poor job
- Very poor job
- Don't know/unsure

Total GOOD JOB, 59%

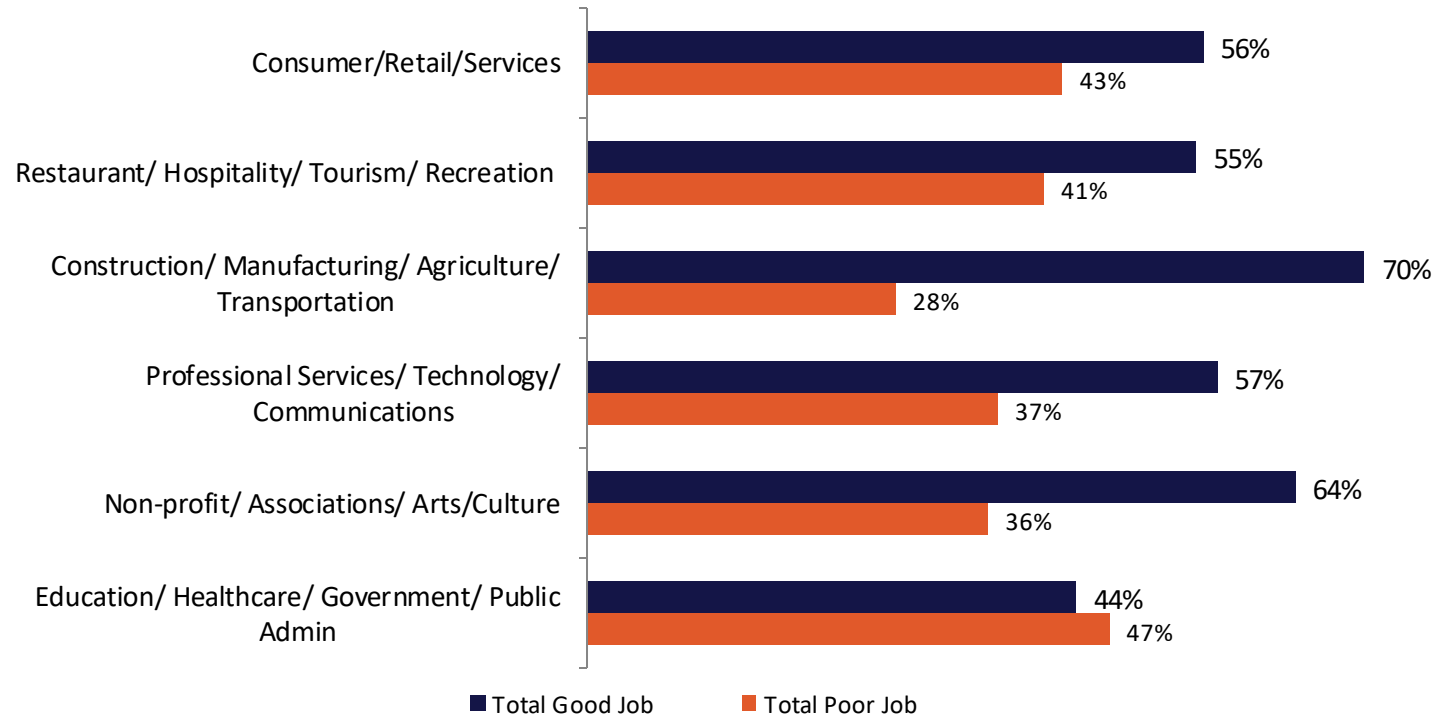
Total POOR JOB, 37%

51% businesses with <50 employees rate the provincial government's efforts as poor vs. 24% of large businesses.

Businesses which are optimistic about their personal business performance rate the provincial government's efforts as good (62% vs 49% of business which are pessimistic about their business.)

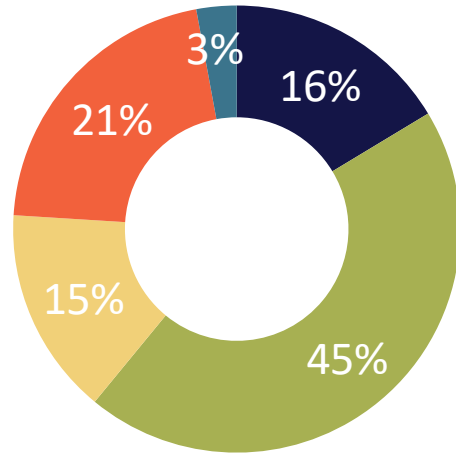
Economic Recovery Efforts: *Government of Manitoba* – By Sector

Q4RRr2: The Government of Manitoba - How would you rate the following levels of government in terms of their efforts and commitment to managing economic recovery? Base: All respondents (n=379)



Economic Recovery Efforts: *Government of Canada*

Q4RRr1: The Government of Canada - How would you rate the following levels of government in terms of their efforts and commitment to managing economic recovery? Base: All respondents (n=379)



- Very Good Job
- Somewhat good job
- Somewhat poor job
- Very poor job
- Don't know/unsure

Total GOOD JOB, 61%

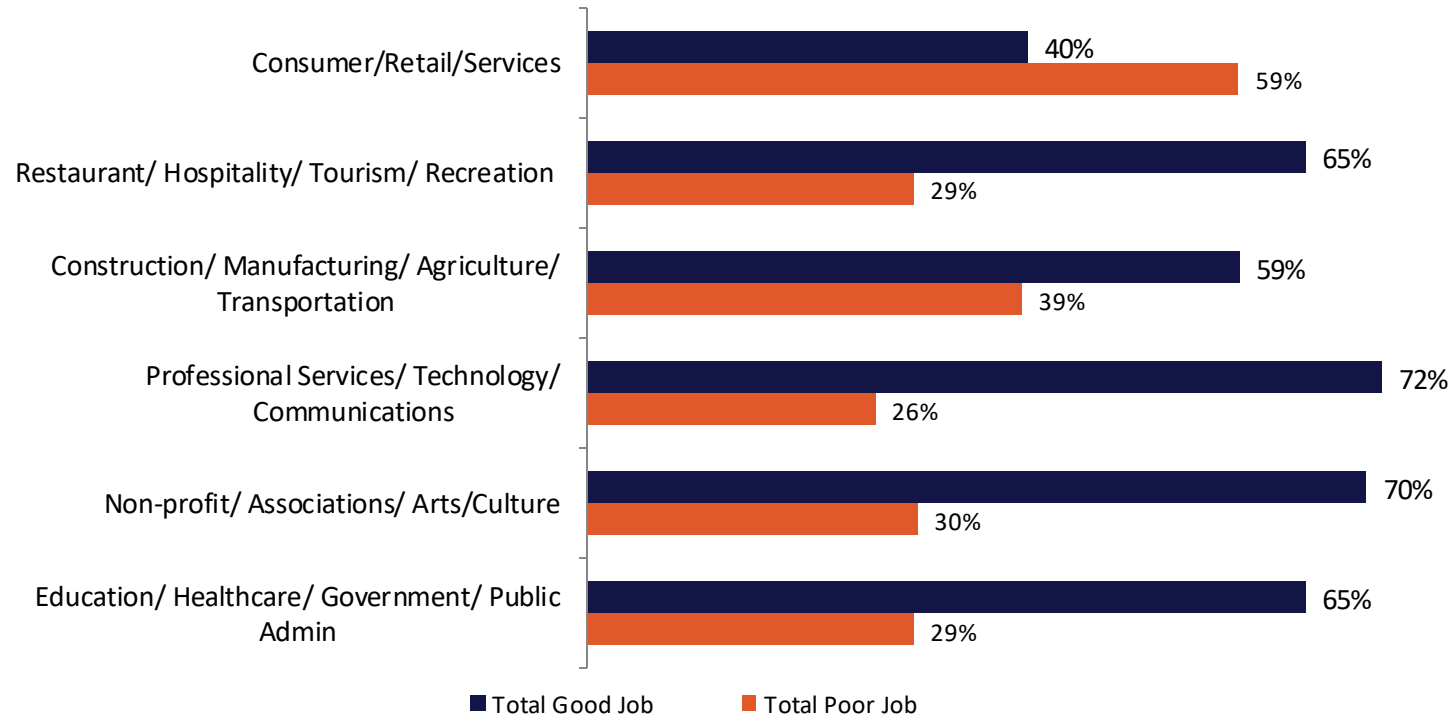
Total POOR JOB, 36%

49% business with <50 employees rate the federal government's efforts as poor vs. 31% of large businesses.

Businesses which are optimistic about their personal business performance rate Government of Canada's efforts as good (66% vs 44% of business which are pessimistic about their business.)

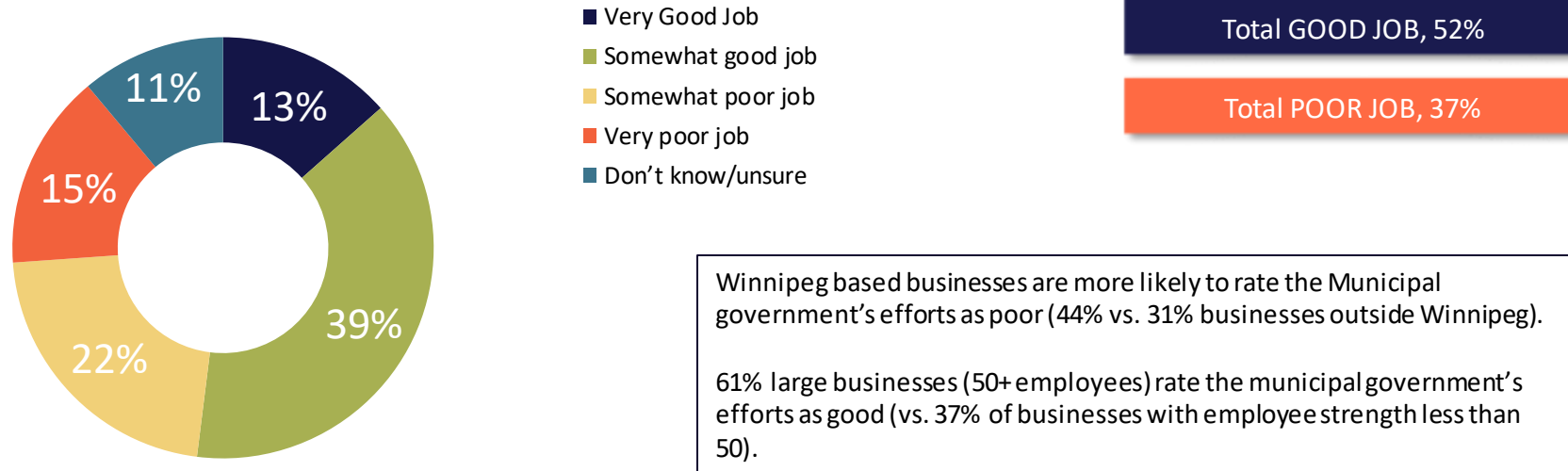
Economic Recovery Efforts: *Government of Canada* – By Sector

Q4RRr1: The Government of Canada - How would you rate the following levels of government in terms of their efforts and commitment to managing economic recovery? Base: All respondents (n=379)



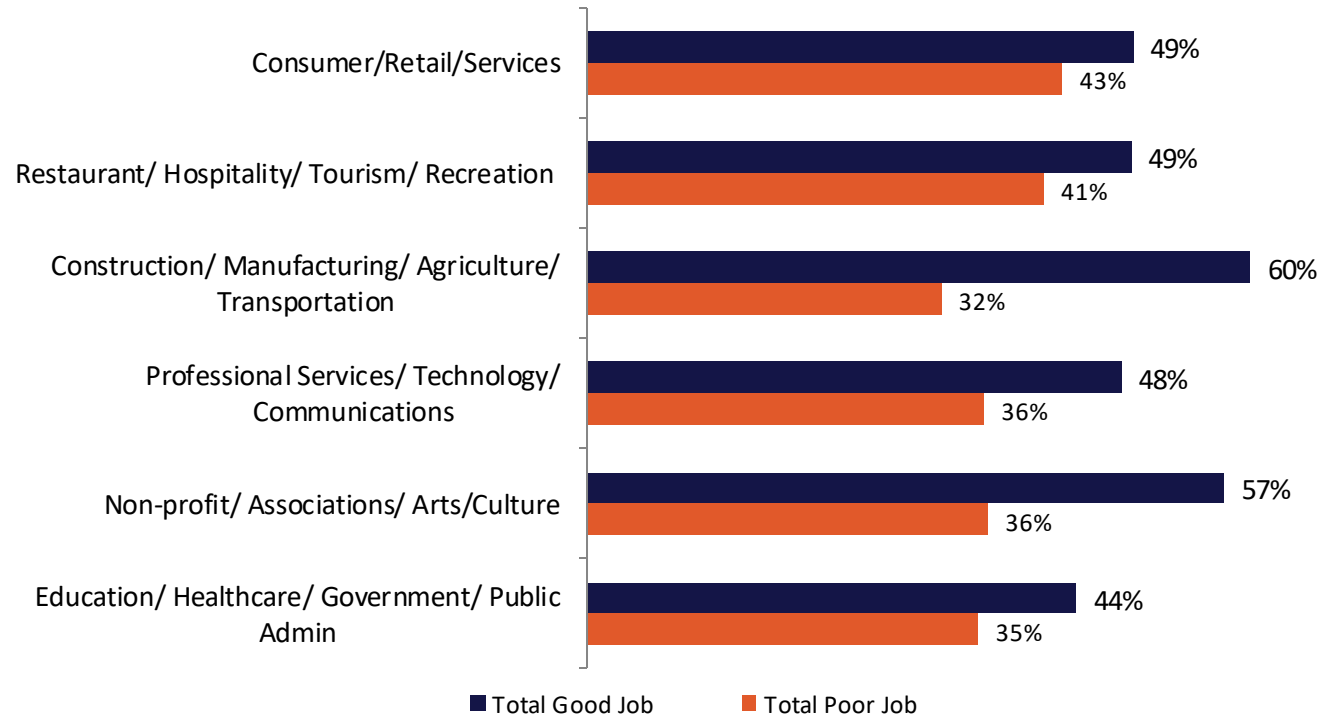
Economic Recovery Efforts: *Municipal Government*

Q4RRr3: Your Municipal Government - How would you rate the following levels of government in terms of their efforts and commitment to managing economic recovery? Base: All respondents (n=379)



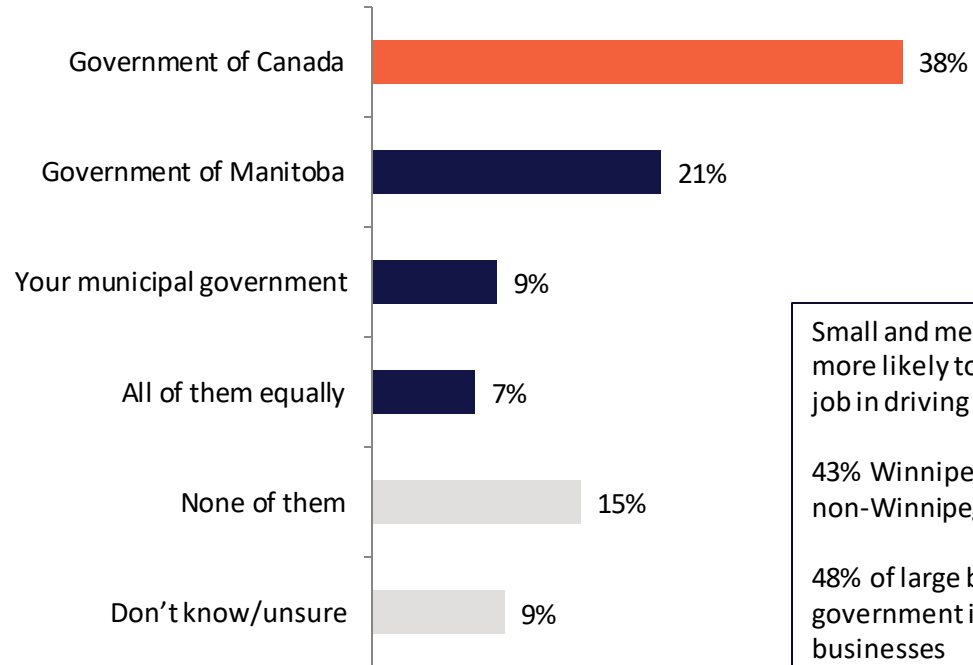
Economic Recovery Efforts: *Municipal Government* – By Sector

Q4RRr3: Your Municipal Government - How would you rate the following levels of government in terms of their efforts and commitment to managing economic recovery? Base: All respondents (n=379)



Level of Government Driving Economic Recovery

Q5RR: Taking into account the post-pandemic experience, in Manitoba, which level of government is doing the best job at driving economic recovery and growth? Base: All respondents (n=379)



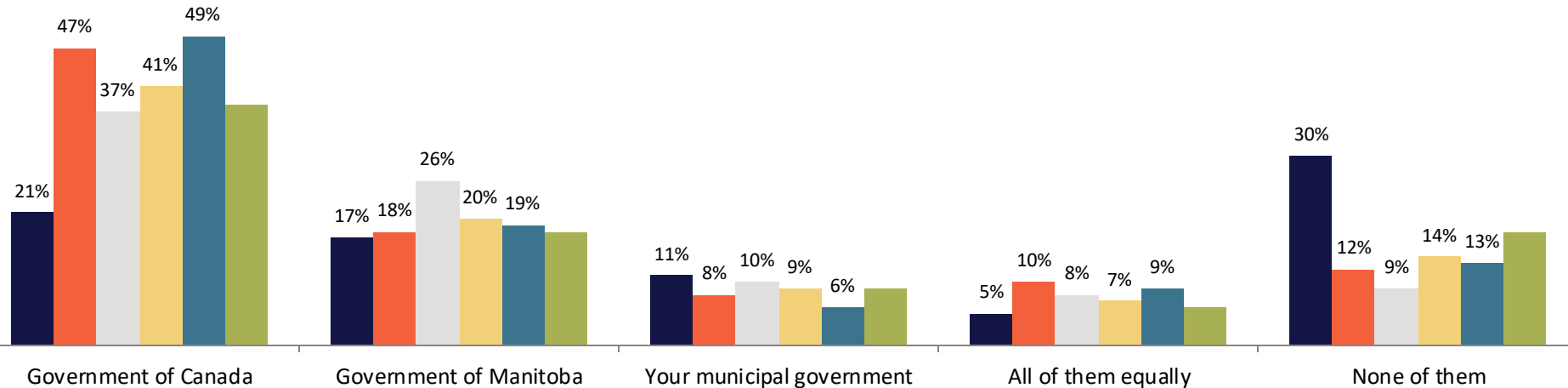
Small and medium sized businesses with <50 employees (22%) are more likely to believe that none of the governments are doing a good job in driving economic recovery (vs. 9% large businesses).

43% Winnipeg businesses favour the Federal government vs. 34% of non-Winnipeg businesses.

48% of large businesses (50+ employees) believe the federal government is doing the best job vs. 32% of small or medium businesses

Level of Government Driving Economic Recovery – By Sector

Q5RR: Taking into account the post-pandemic experience, in Manitoba, which level of government is doing the best job at driving economic recovery and growth? Base: All respondents (n=379)



■ Consumer/Retail/Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

■ Restaurant/ Hospitality/ Tourism/ Recreation

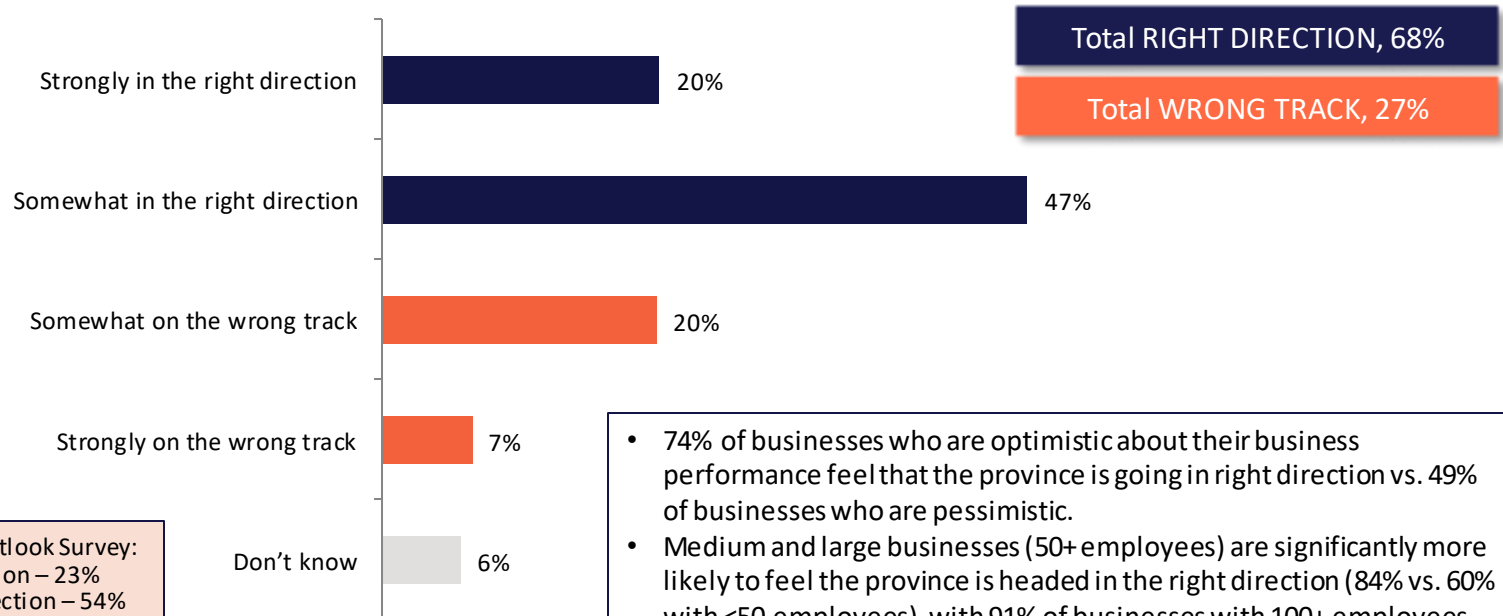
■ Professional Services/ Technology/ Communications

■ Education/ Healthcare/ Government/ Public Admin

Current Economic State of Manitoba

Province: Right Direction / Wrong Track

Q13: In your opinion as a businessperson, do you feel things overall in the province are still heading in the right direction or is Manitoba on the wrong track? Base: All respondents (n=379)



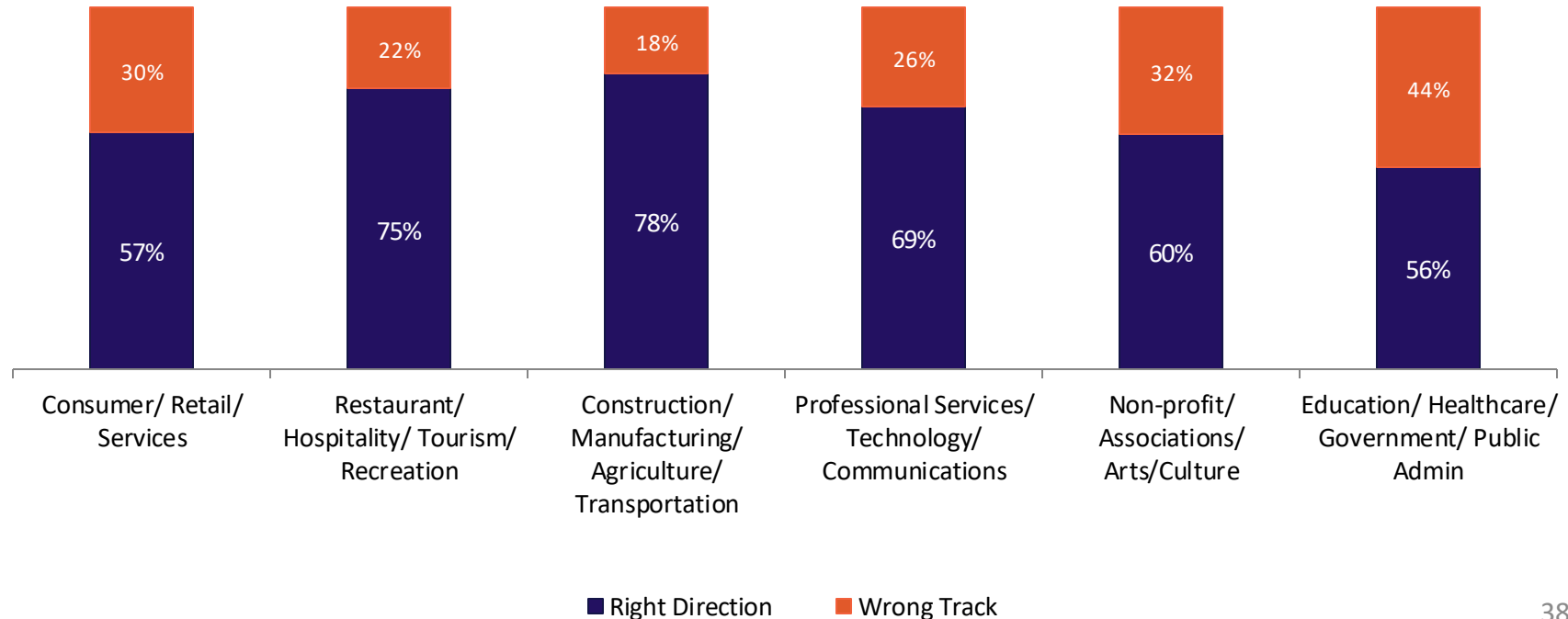
In the 2021 Business Outlook Survey:

- Strongly Right Direction – 23%
- Somewhat Right Direction – 54%
- Somewhat Wrong Track – 13%
- Strongly Wrong Track – 7%
- Don't Know – 3%

- 74% of businesses who are optimistic about their business performance feel that the province is going in right direction vs. 49% of businesses who are pessimistic.
- Medium and large businesses (50+ employees) are significantly more likely to feel the province is headed in the right direction (84% vs. 60% with <50 employees), with 91% of businesses with 100+ employees agreeing Manitoba is on the right track.

Province: Right/ Wrong Track – By Sector

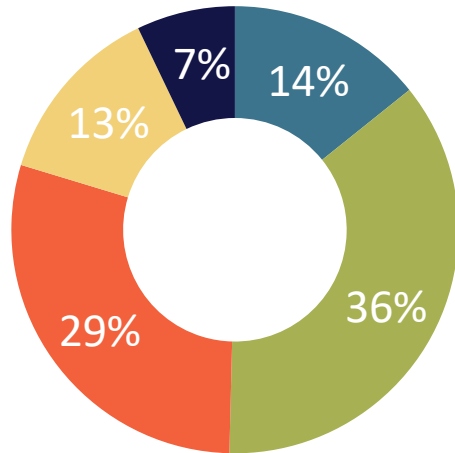
Q13: In your opinion as a businessperson, do you feel things overall in the province are still heading in the right direction or is Manitoba on the wrong track? Base: All respondents (n=379)



Competitiveness of Manitoba Business Climate

Q17: Do you agree or disagree with the following statement: Manitoba's business climate is competitive with other provinces?

Base: All respondents (n=379)



- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Don't know

Total AGREE, 50%

Total DISAGREE, 42%

In the 2021 Business Outlook Survey:

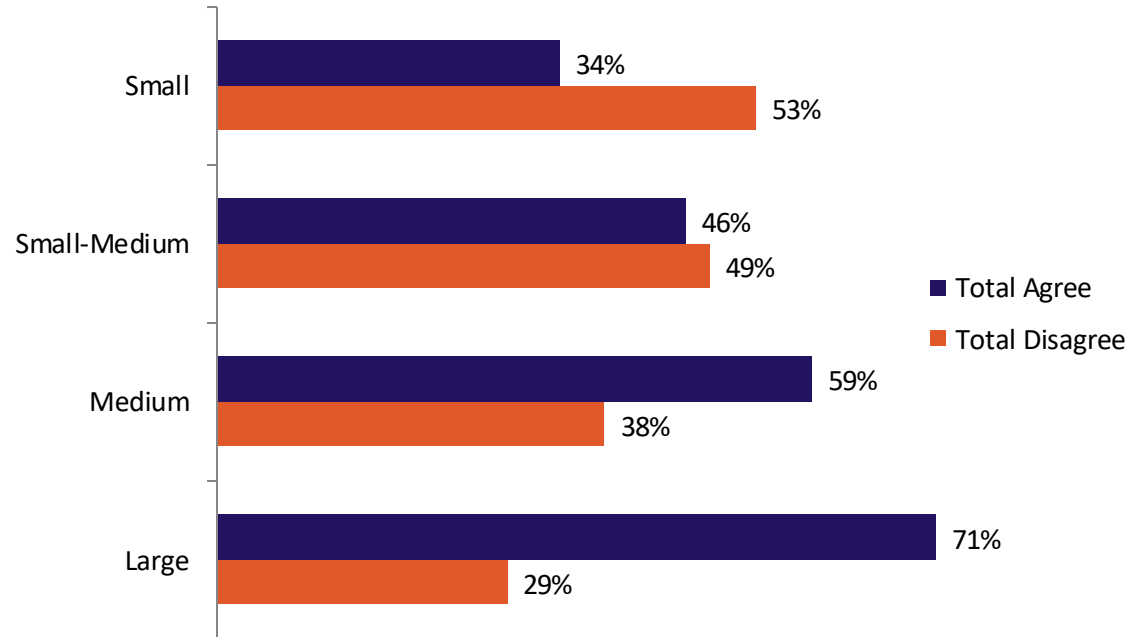
- Strongly Agree – 16%
- Somewhat Agree – 45%
- Somewhat Disagree – 20%
- Strongly Disagree – 10%
- Don't Know – 9%

The findings this year resemble the results from the 2020 survey.

Competitiveness of Manitoba Business Climate – By Employee Size

Q17: Do you agree or disagree with the following statement: Manitoba's business climate is competitive with other provinces?

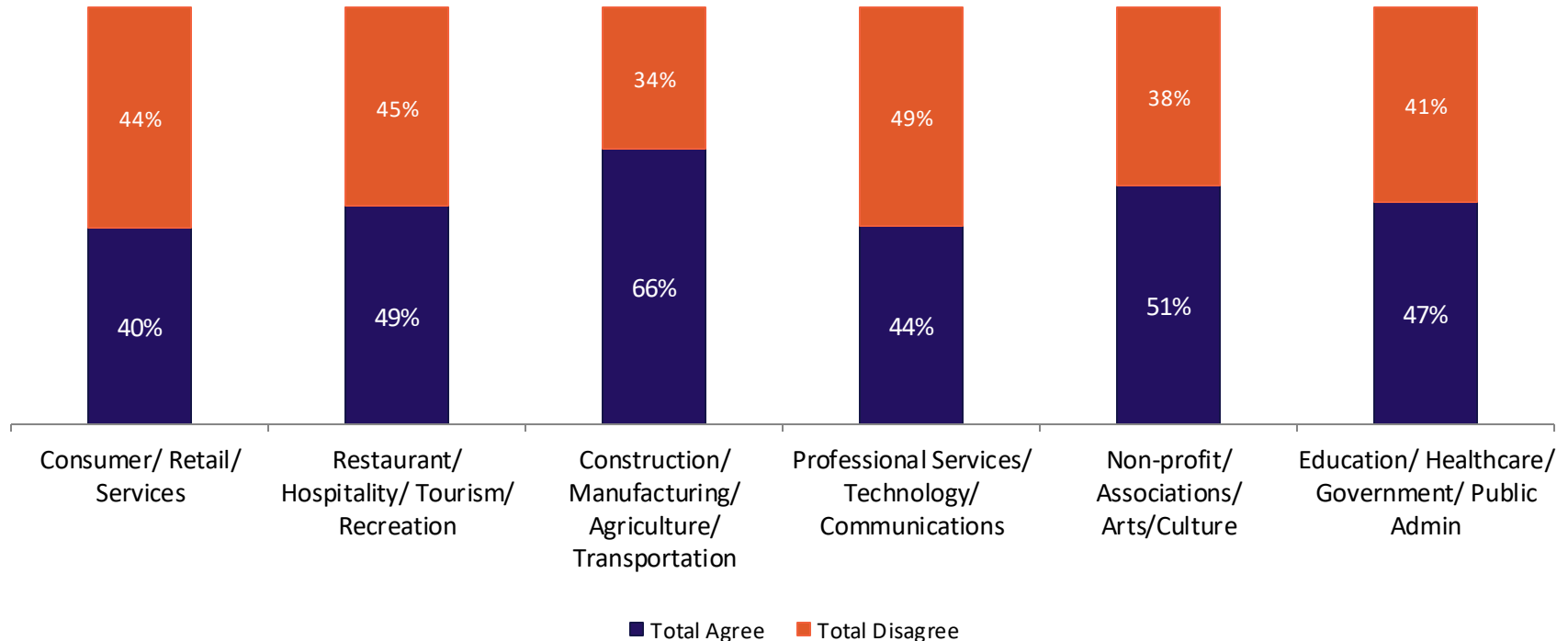
Base: All respondents (n=379)



Competitiveness of Manitoba Business Climate – By Sector

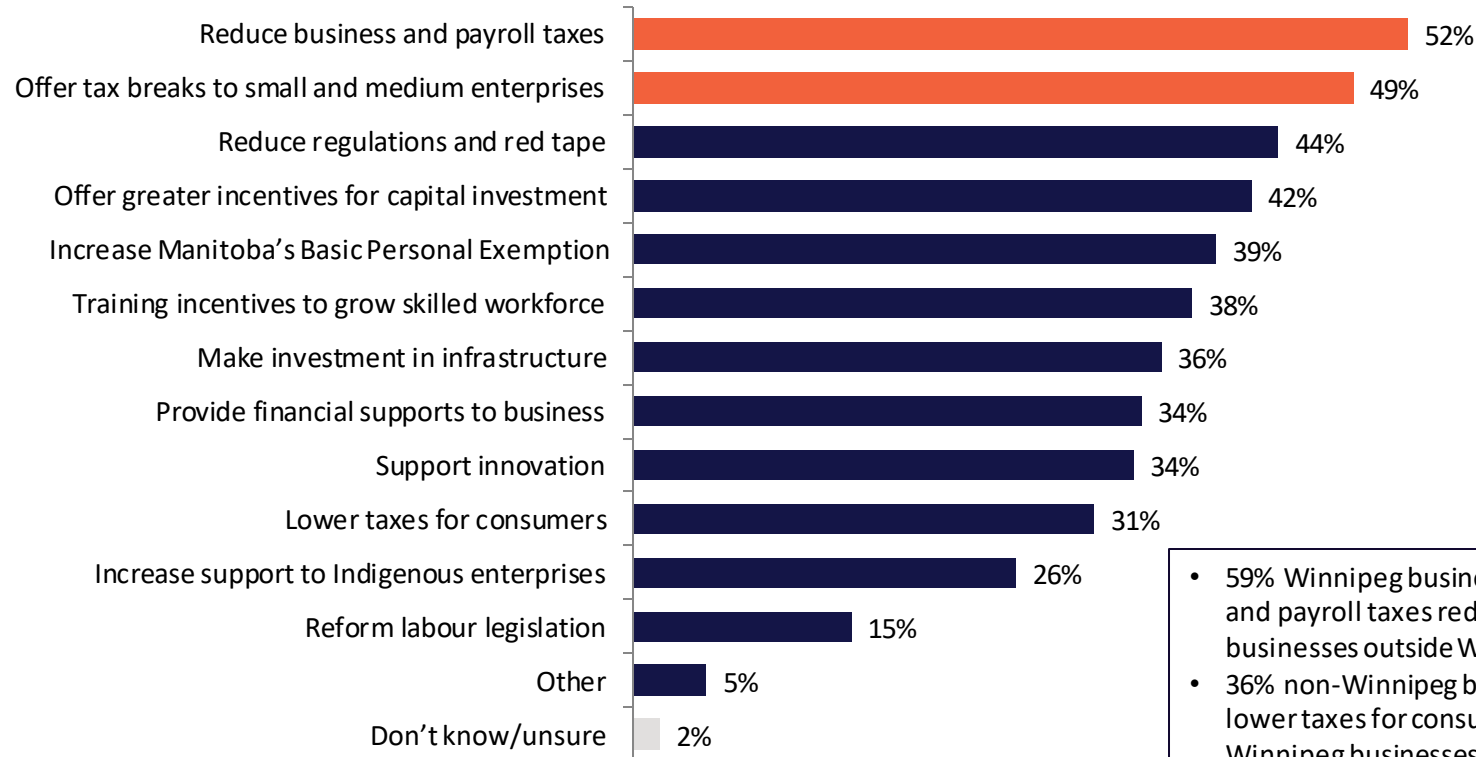
Q17: Do you agree or disagree with the following statement: Manitoba’s business climate is competitive with other provinces?

Base: All respondents (n=379)



Actions to Improve Manitoba's Competitiveness

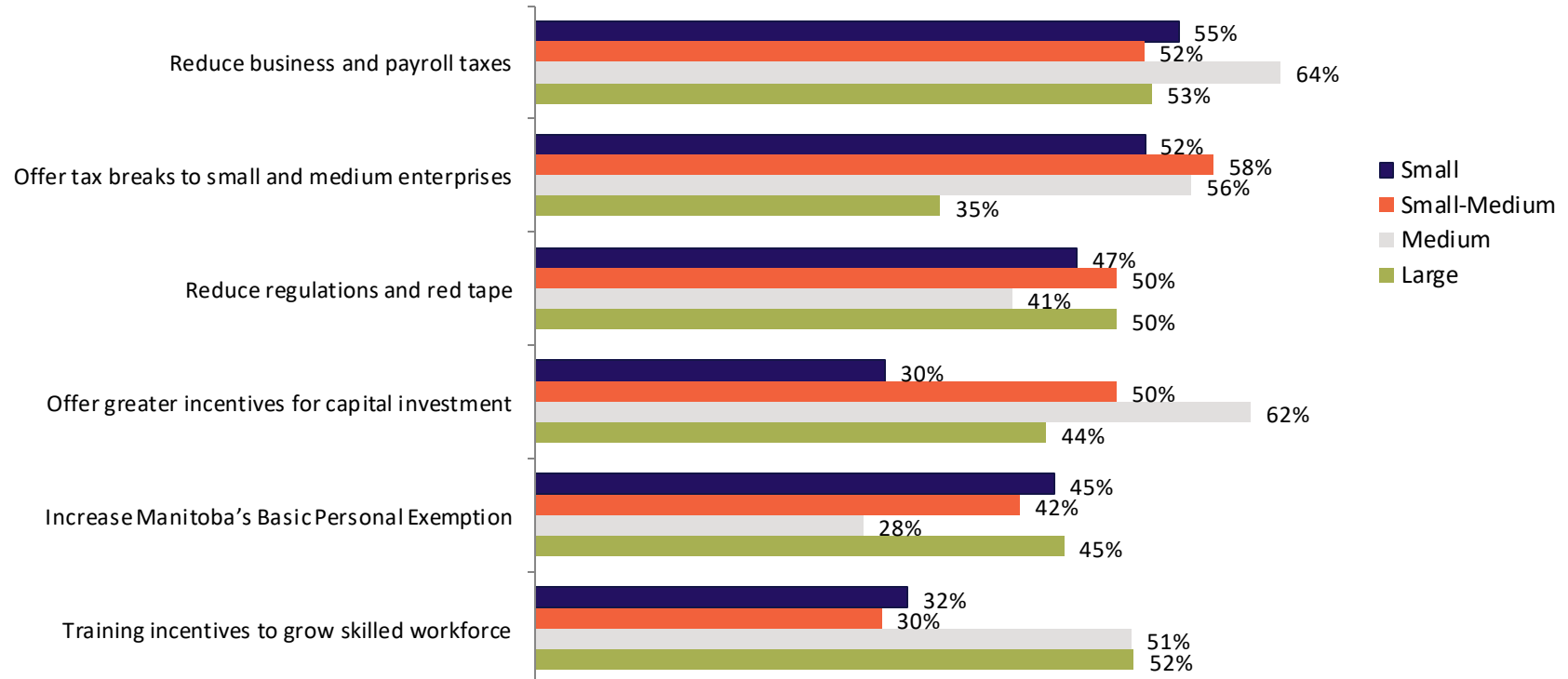
Q1EC. In your opinion, which of the following provincial government measures would most significantly improve the competitiveness of Manitoba's business climate? Base: All respondents (n=379)



- 59% Winnipeg businesses want business and payroll taxes reduced vs. 46% businesses outside Winnipeg.
- 36% non-Winnipeg businesses would like lower taxes for consumers vs. 26% Winnipeg businesses.

Actions to Improve Manitoba's Competitiveness – By Employee Size

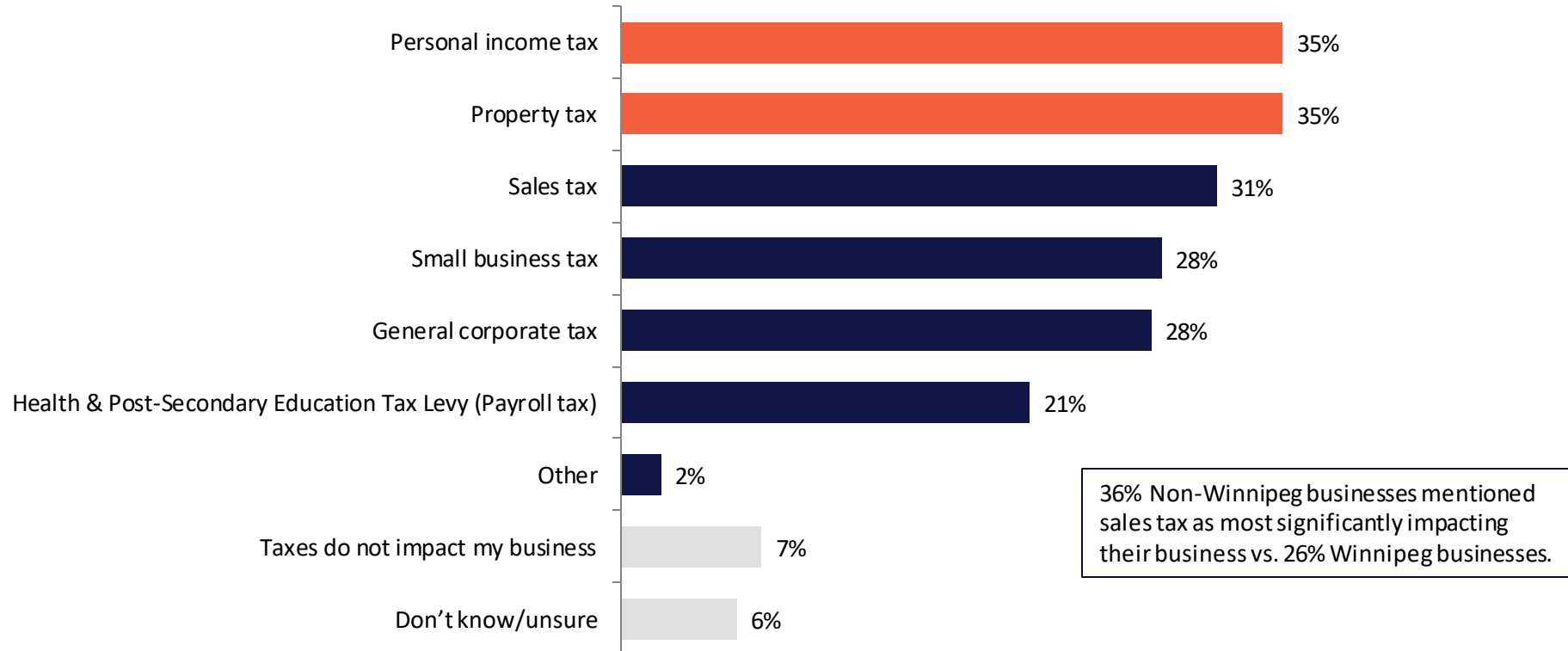
Q1EC. In your opinion, which of the following provincial government measures would most significantly improve the competitiveness of Manitoba's business climate? [TOP 6 ACTIONS] Base: All respondents (n=379)



Tax with Most Significant Impact

Q2EC. In your experience, which tax has the most significant impact on your business or organization?

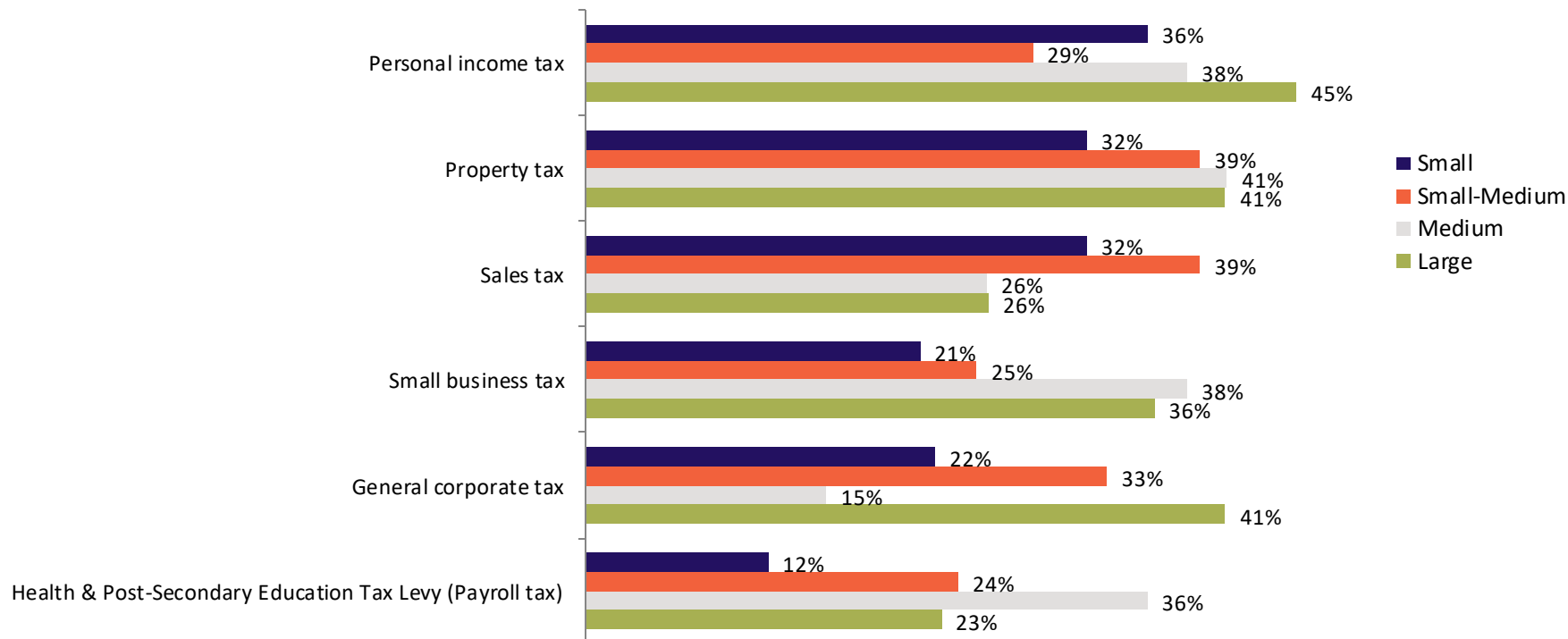
Base: All respondents (n=379)



Tax with Most Significant Impact – By Employee Size

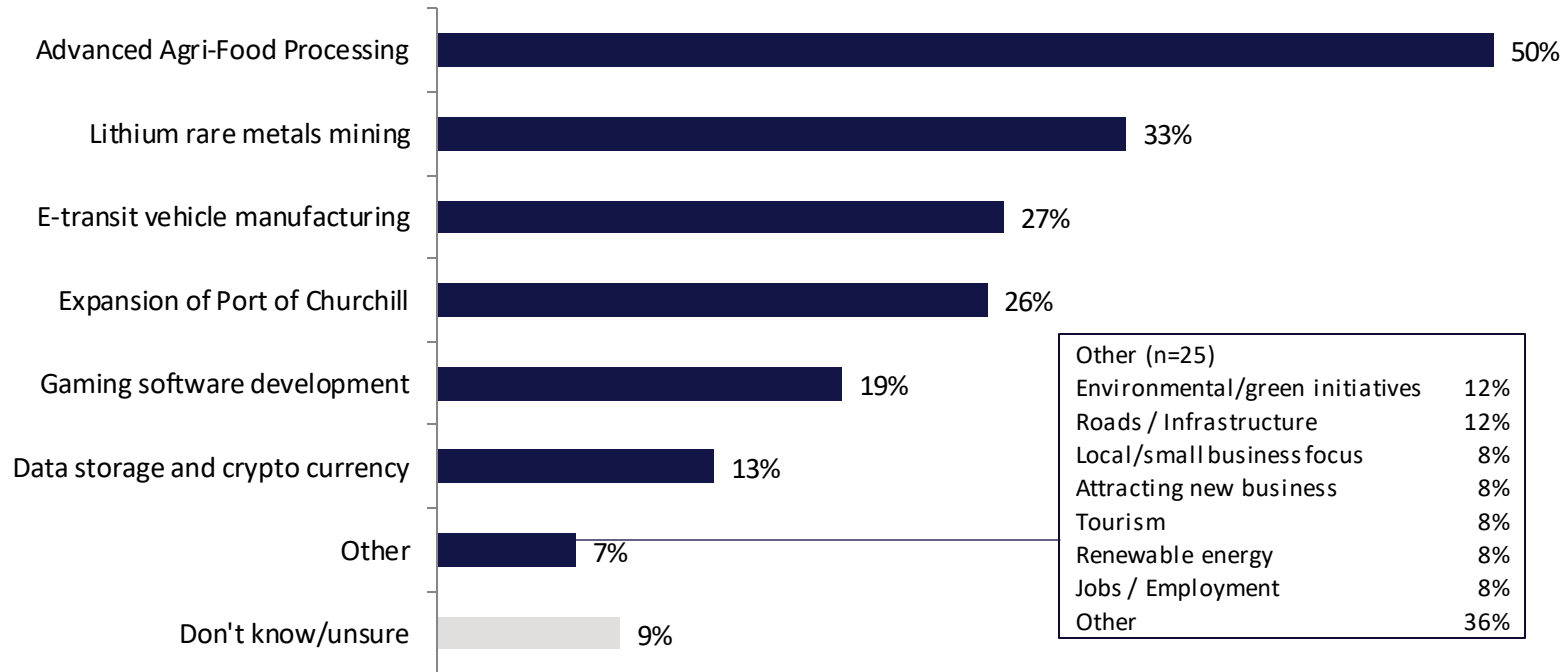
Q2EC. In your experience, which tax has the most significant impact on your business or organization?

Base: All respondents (n=379)



Opportunities for Advocacy

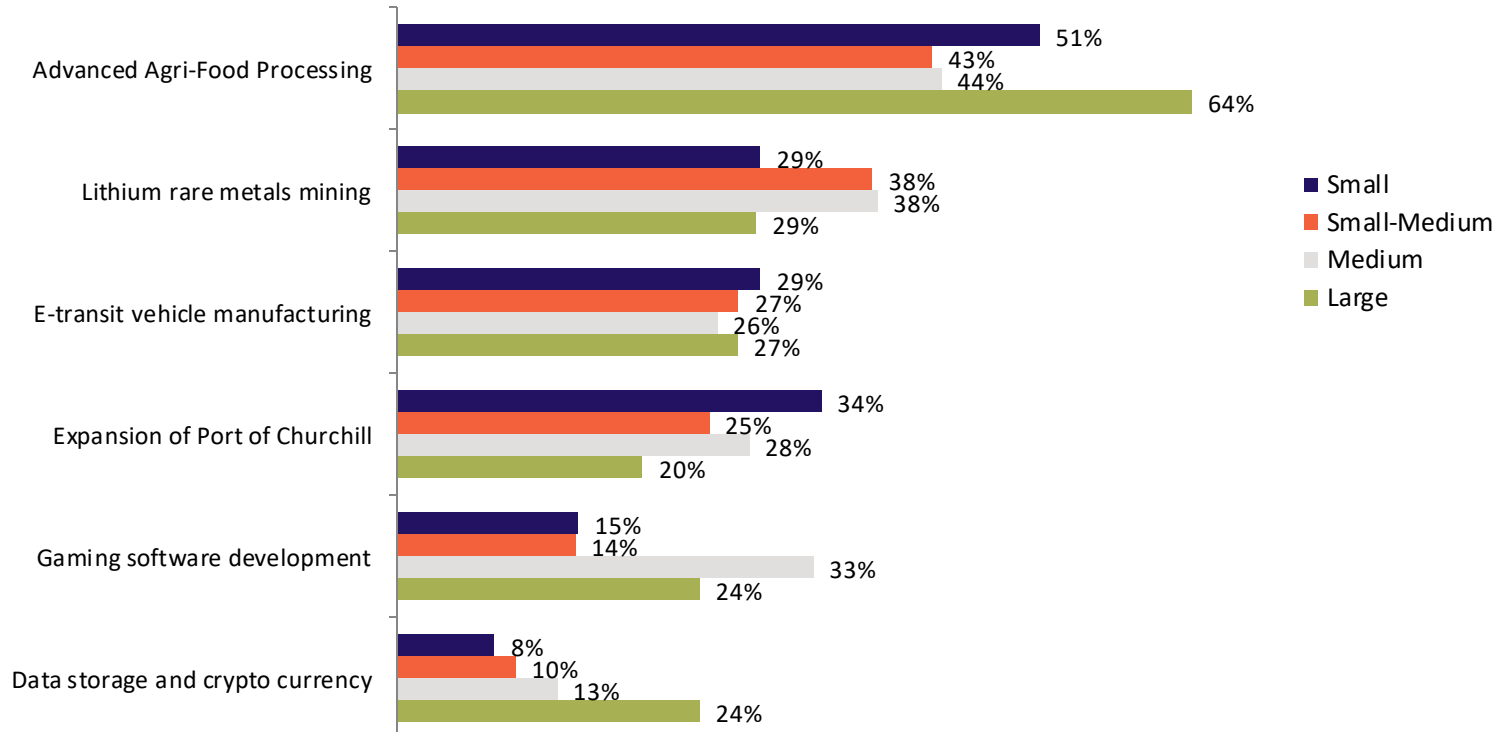
Q1T. Which would you say are the top 2 opportunities for where Chambers of Commerce should focus advocacy work
[TOP 2 MENTIONS] Base: All respondents (n=379)



Opportunities for Advocacy – By Employee Size

Q1T. Which would you say are the top 2 opportunities for where Chambers of Commerce should focus advocacy work

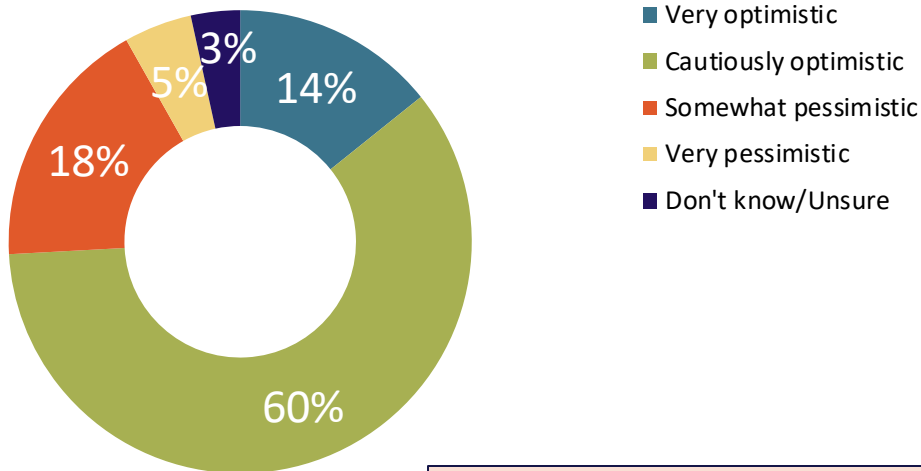
Base: All respondents (n=379)



Business Expectations for the Future

Business Optimism

Q16: At this point in time, how do you feel about your business and its performance? Are you generally optimistic or pessimistic? Base: All respondents (n=379)



In the 2021 Business Outlook Survey:

- Very Optimistic – 32%
- Cautiously Optimistic – 57%
- Somewhat Pessimistic – 7%
- Very Pessimistic – 3%
- Don't Know – 1%

Total OPTIMISTIC, 74%

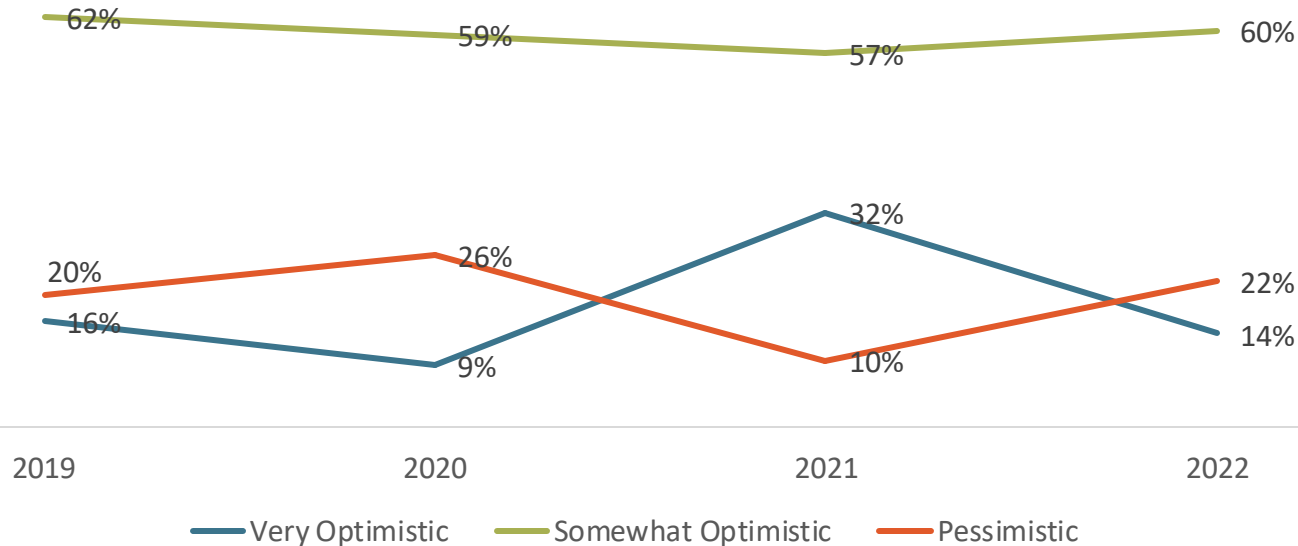
Total PESSIMISTIC, 22%

Firms with decreased revenue since pandemic (50% of pre-pandemic levels) are more likely to be pessimistic (46% vs. 15% firms that have reached or exceeded pre-pandemic revenue levels).

Medium Businesses (50-99 employees) are more pessimistic as compared to small or large businesses (41% vs. 23% small/medium or 21% large businesses)

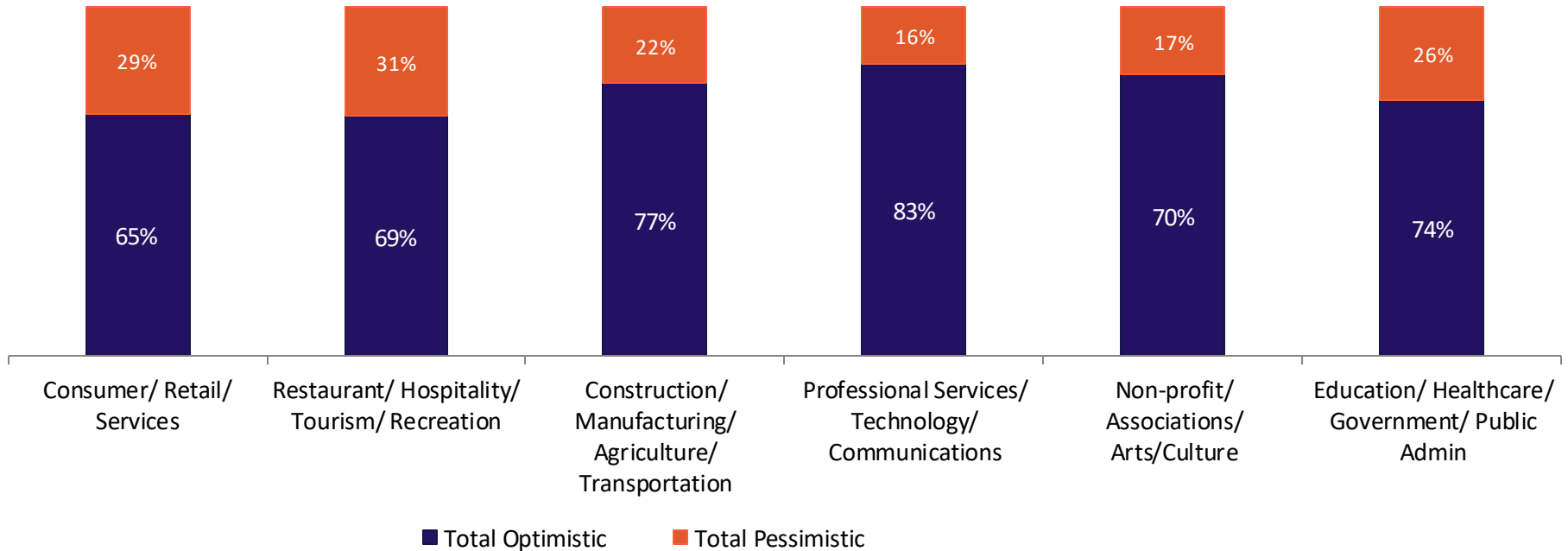
Business Optimism – Historical Comparison

Q16: At this point in time, how do you feel about your business and its performance? Are you generally optimistic or pessimistic? Base: All respondents (N₂₀₂₂=379/ N₂₀₂₁=419/ N₂₀₂₀=397)



Business Optimism – By Sector

Q16: At this point in time, how do you feel about your business and its performance? Are you generally optimistic or pessimistic? Base: All respondents (n=379)



Greatest Challenge in Next 6-12 months

Q14: Thinking about the next 6 to 12 months, from your perspective, what is the greatest challenge facing your organization?

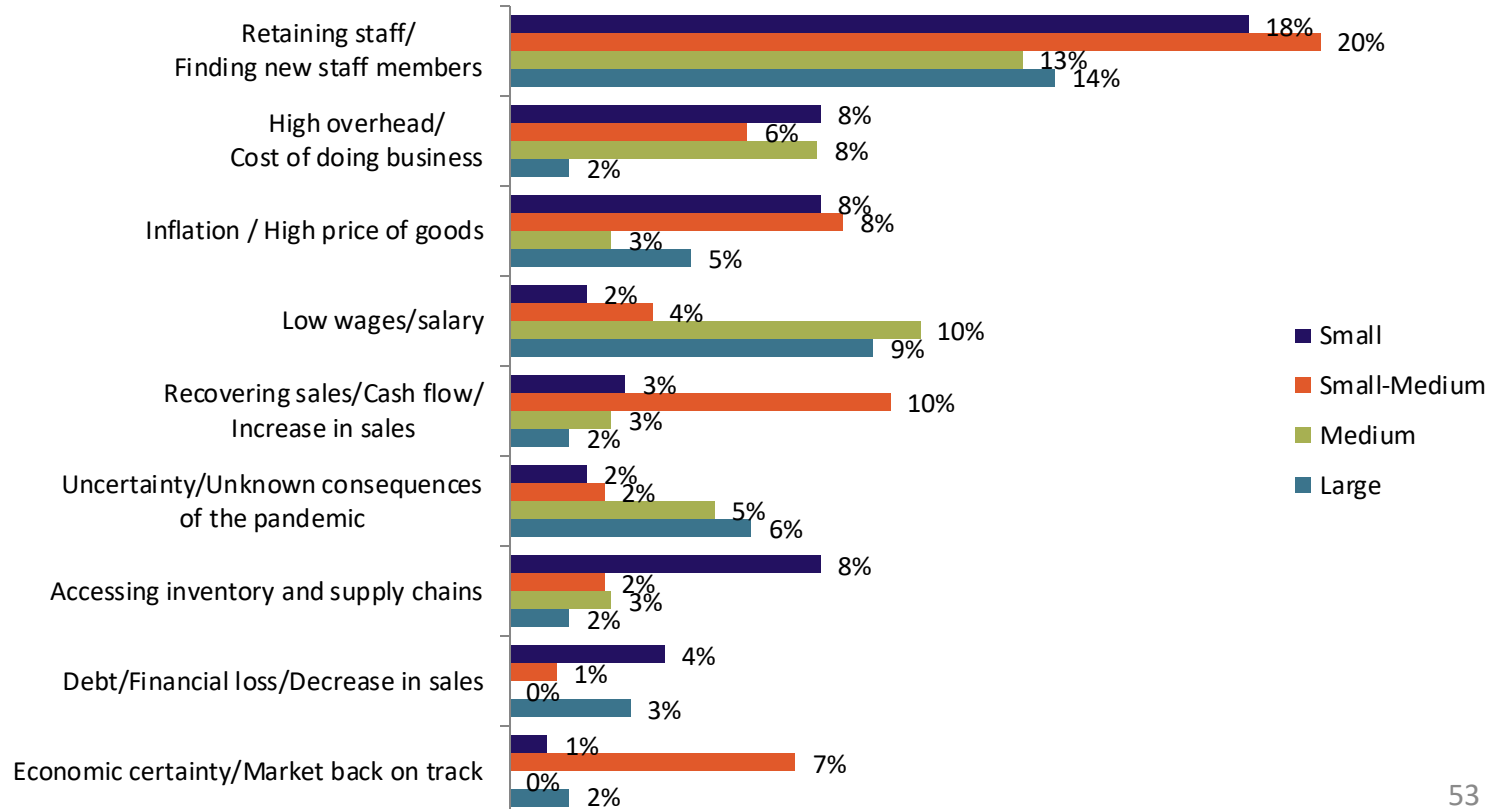
Base: All respondents (n=379) [Mentioned by 2% or more]



Retaining staff/Finding new staff members was also the most frequently mentioned issue in 2021 (14%).

Greatest Challenge Facing Company – By Employee Size

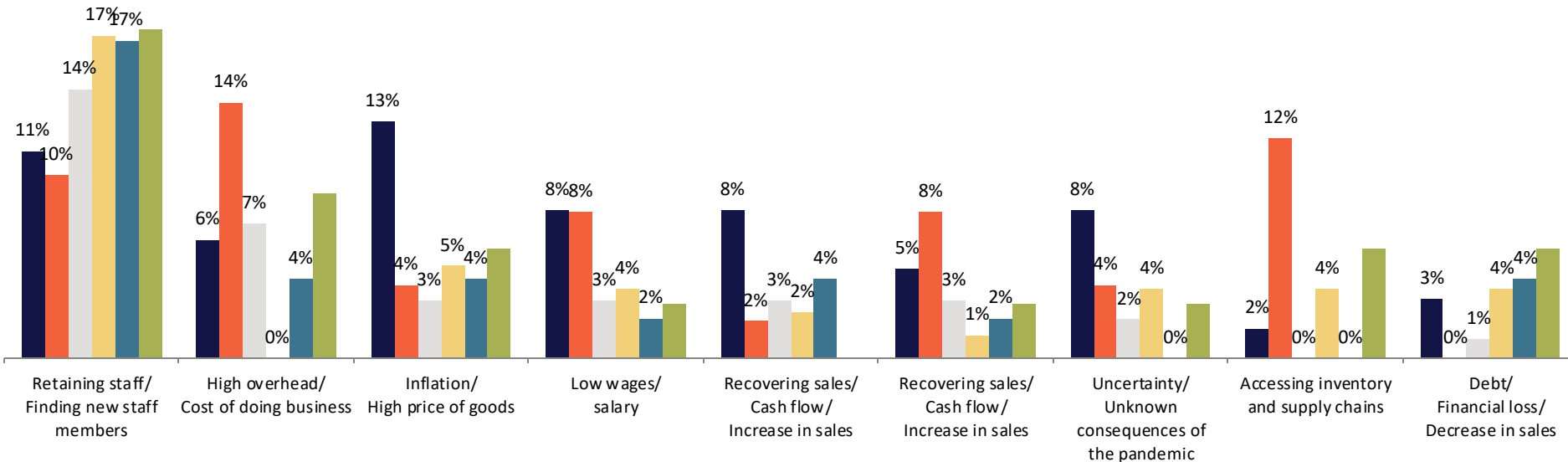
Q14: Thinking about the next 6 to 12 months, from your perspective, what is the greatest challenge facing your organization?
 [TOP 9 RESPONSES] Base: All respondents (n=379)



Greatest Challenge Facing Company – By Sector

Q14: Thinking about the next 6 to 12 months, from your perspective, what is the greatest challenge facing your organization?

[TOP 9 RESPONSES] Base: All respondents (n=379)



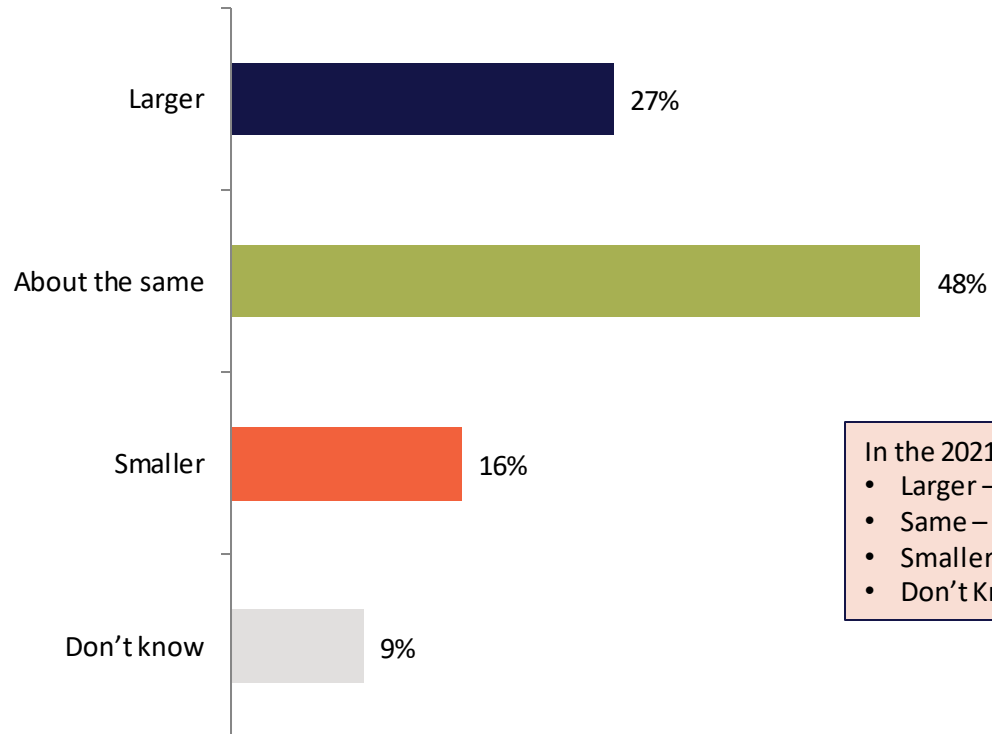
- Consumer/Retail/Services
- Restaurant/ Hospitality/ Tourism/ Recreation
- Construction/ Manufacturing/ Agriculture/ Transportation
- Professional Services/ Technology/ Communications
- Non-profit/ Associations/ Arts/Culture
- Education/ Healthcare/ Government/ Public Admin

- Restaurant/ Hospitality/ Tourism/ Recreation
- Professional Services/ Technology/ Communications
- Education/ Healthcare/ Government/ Public Admin

Business Growth Expectations

Q15: Thinking about 12 months from now, do you expect the number of people employed by your company will be...?

Base: All respondents (n=379)



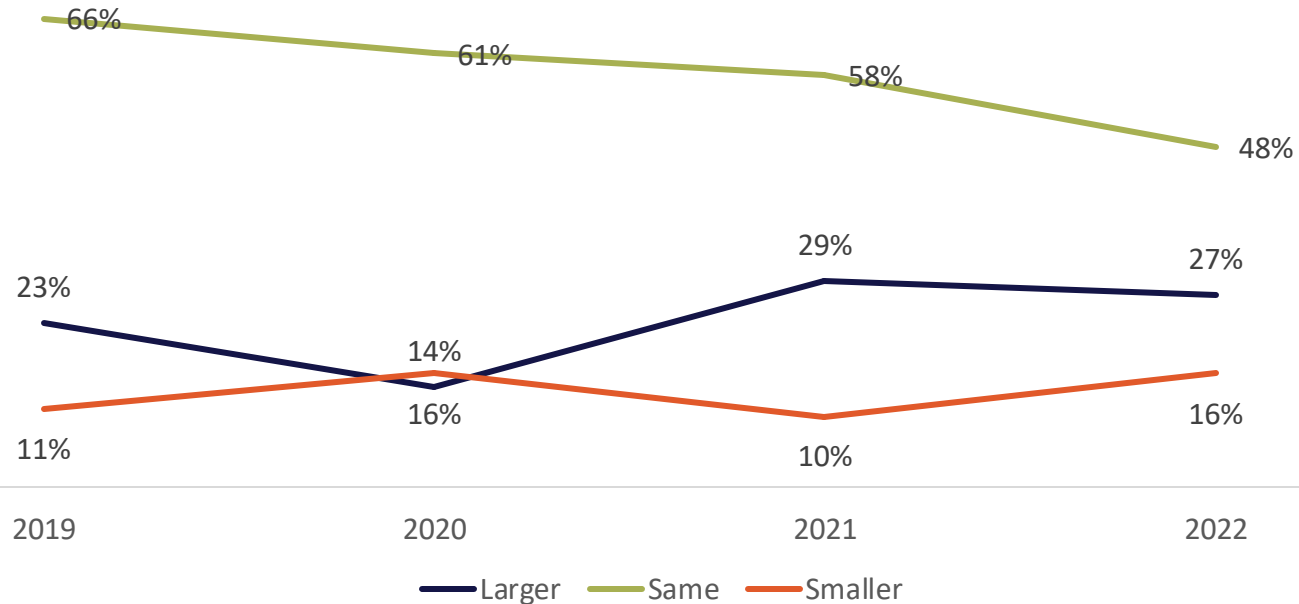
In the 2021 Business Outlook Survey:

- Larger – 29%
- Same – 58%
- Smaller – 10%
- Don't Know – 3%

Business Growth Expectations – Historical Comparison

Q15: Thinking about 12 months from now, do you expect the number of people employed by your company will be...?

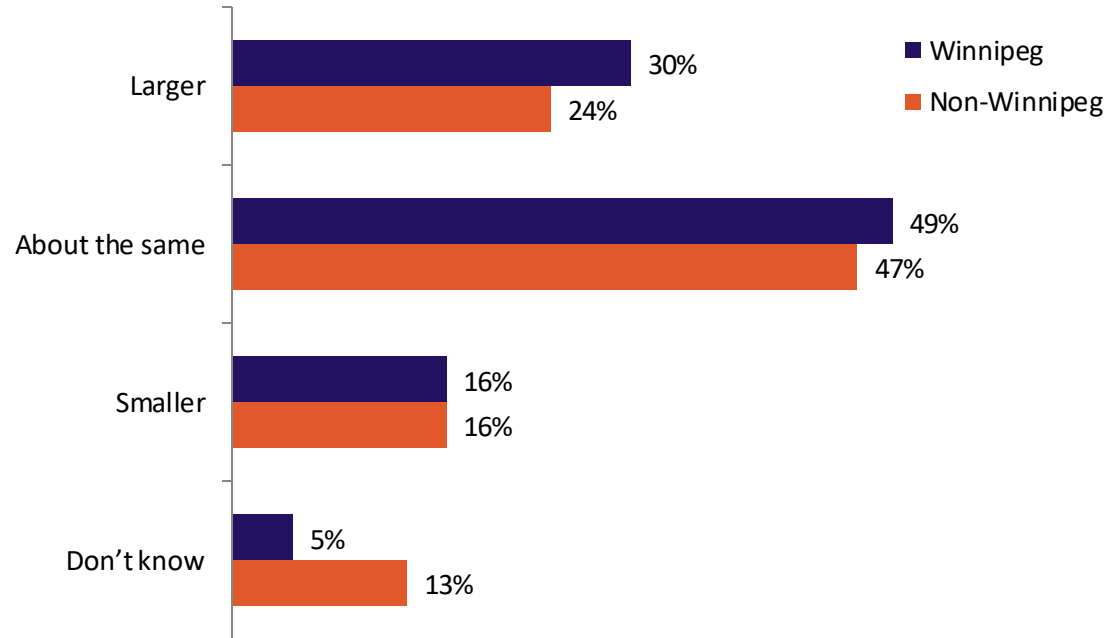
Base: All respondents



Business Growth Expectations – By Region

Q15: Thinking about 12 months from now, do you expect the number of people employed by your company will be...?

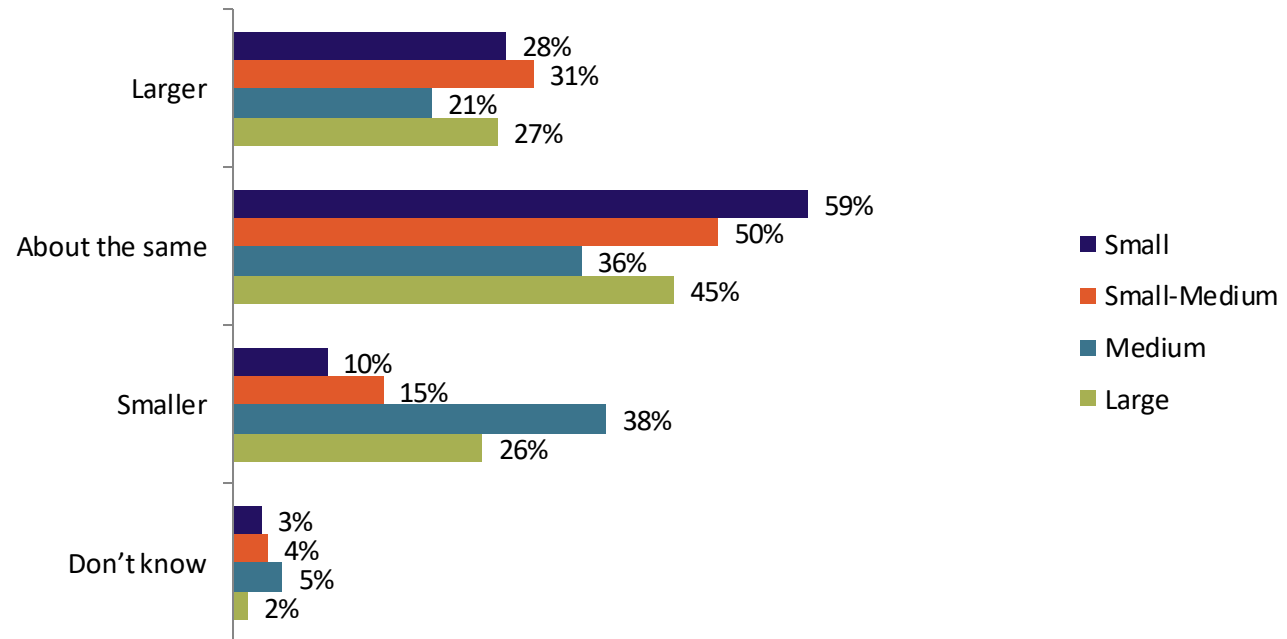
Base: All respondents (n=379)



Business Growth Expectations – By Employee Size

Q15: Thinking about 12 months from now, do you expect the number of people employed by your company will be...?

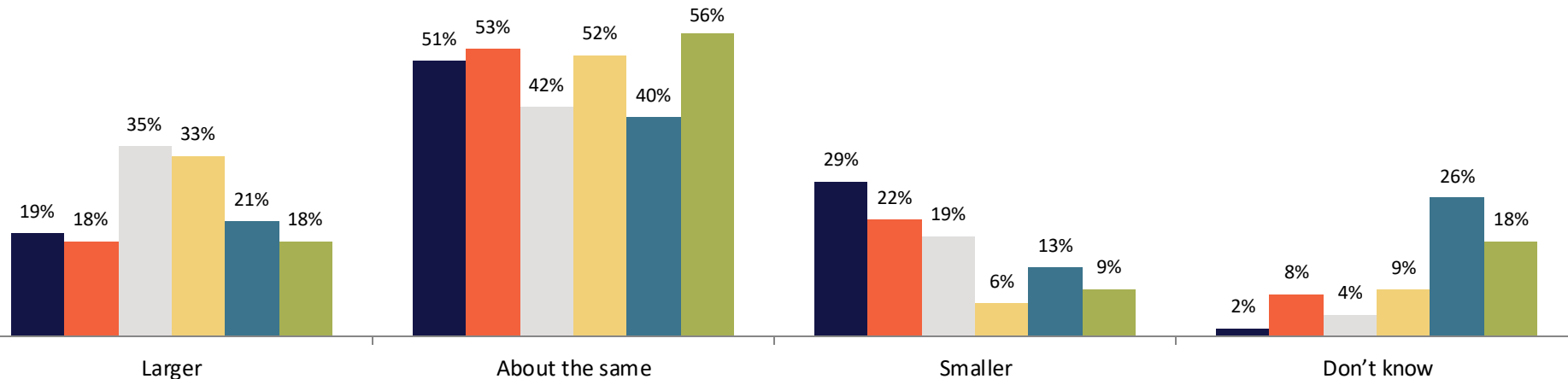
Base: All respondents (n=379)



Business Growth Expectations – By Sector

Q15: Thinking about 12 months from now, do you expect the number of people employed by your company will be...?

Base: All respondents (n=379)



■ Consumer/ Retail/ Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

■ Restaurant/ Hospitality/ Tourism/ Recreation

■ Professional Services/ Technology/ Communications

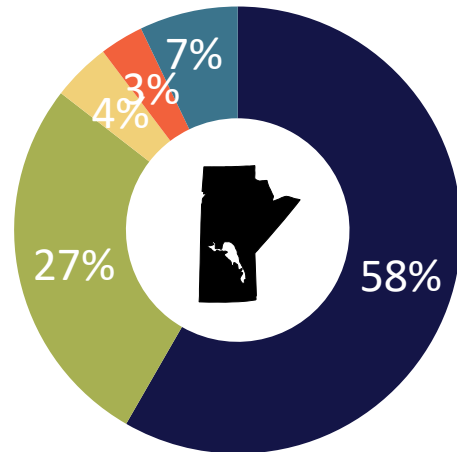
■ Education/ Healthcare/ Government/ Public Admin

Trade Opportunities

Manitoba Government's Role in International Trade Opportunities

Q3T: Regardless of how important international trade is for your business, how important is it for the provincial government to have a clear strategy to build international trade opportunities for Manitoban businesses?

Base: All respondents (n=379)



- Very important
- Somewhat important
- Not very important
- Not at all important
- Don't know/unsure

Total IMPORTANT, 85%

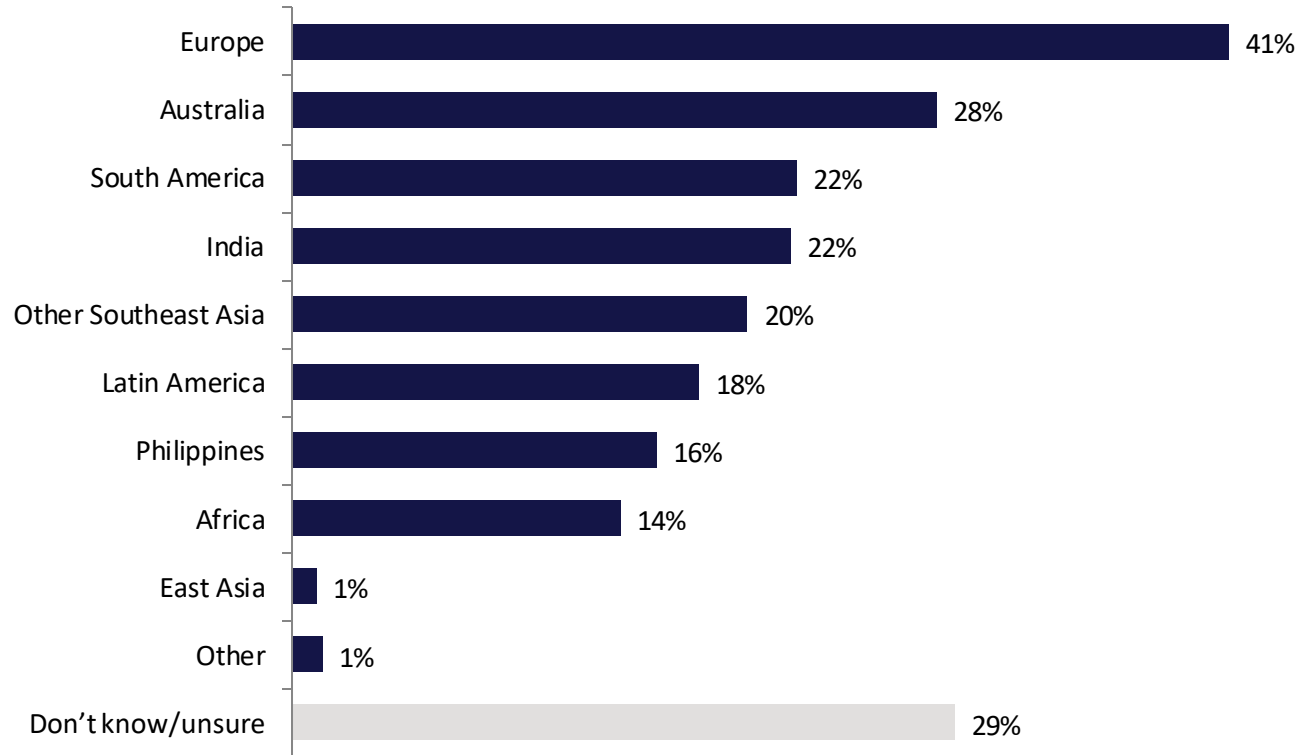
Total NOT IMPORTANT, 7%

- Winnipeg businesses are more likely to feel it is important for the provincial government to have a clear strategy to build international trade opportunities for Manitoban businesses, and in fact, to feel it is very important (67% vs. 51% outside Winnipeg).

Potential New Trade Partners

Q4T: Where should the federal and provincial governments focus their efforts on establishing new trade partners?

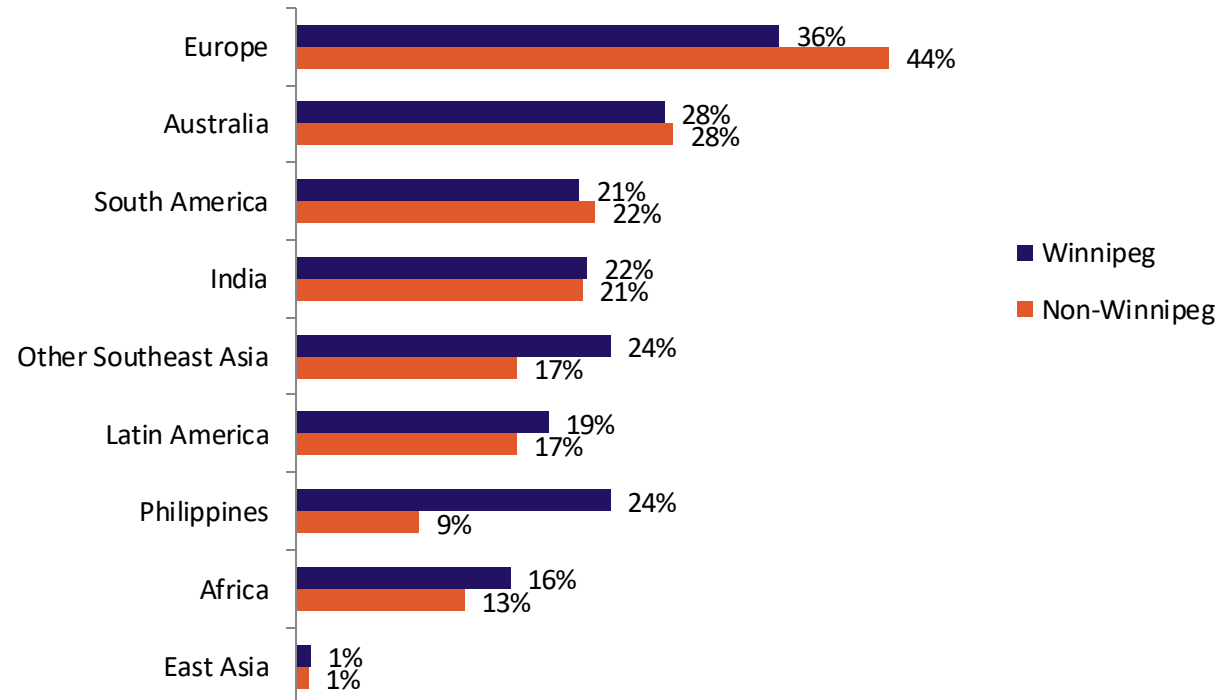
Base: All respondents (n=379)



Potential New Trade Partners – By Region

Q4T: Where should the federal and provincial governments focus their efforts on establishing new trade partners?

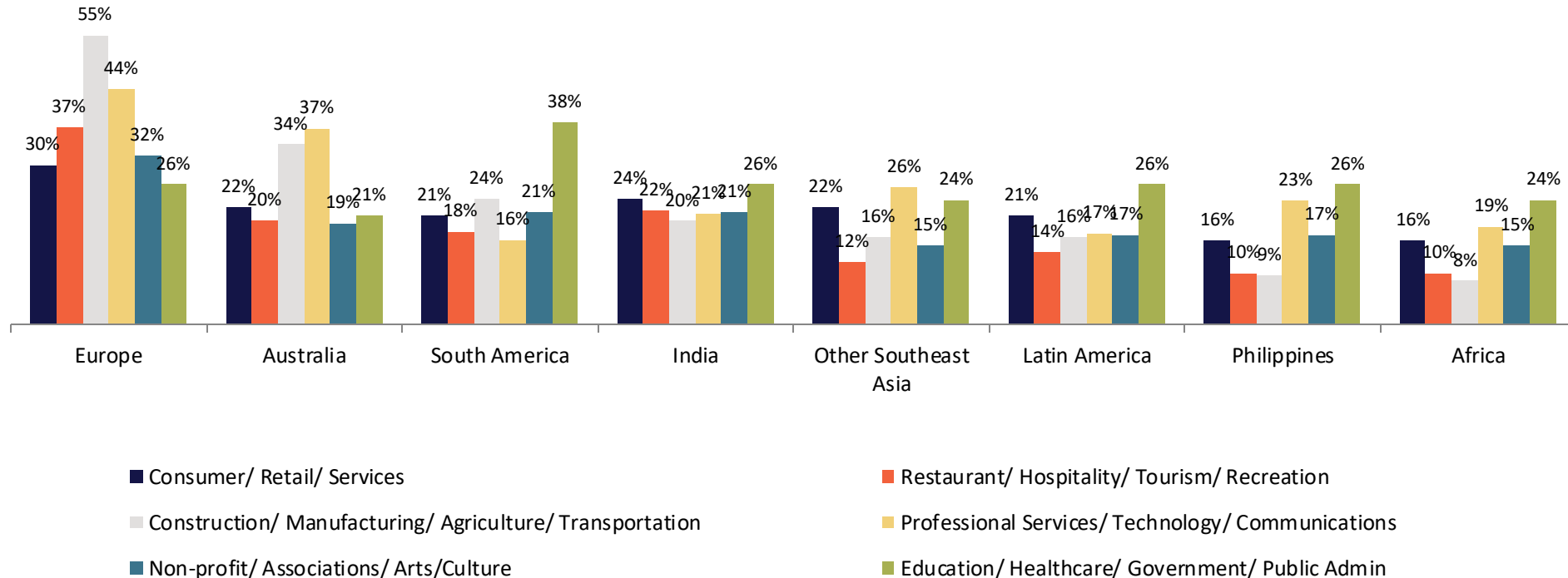
Base: All respondents (n=379)



Potential New Trade Partners – By Sector

Q4T: Where should the federal and provincial governments focus their efforts on establishing new trade partners?

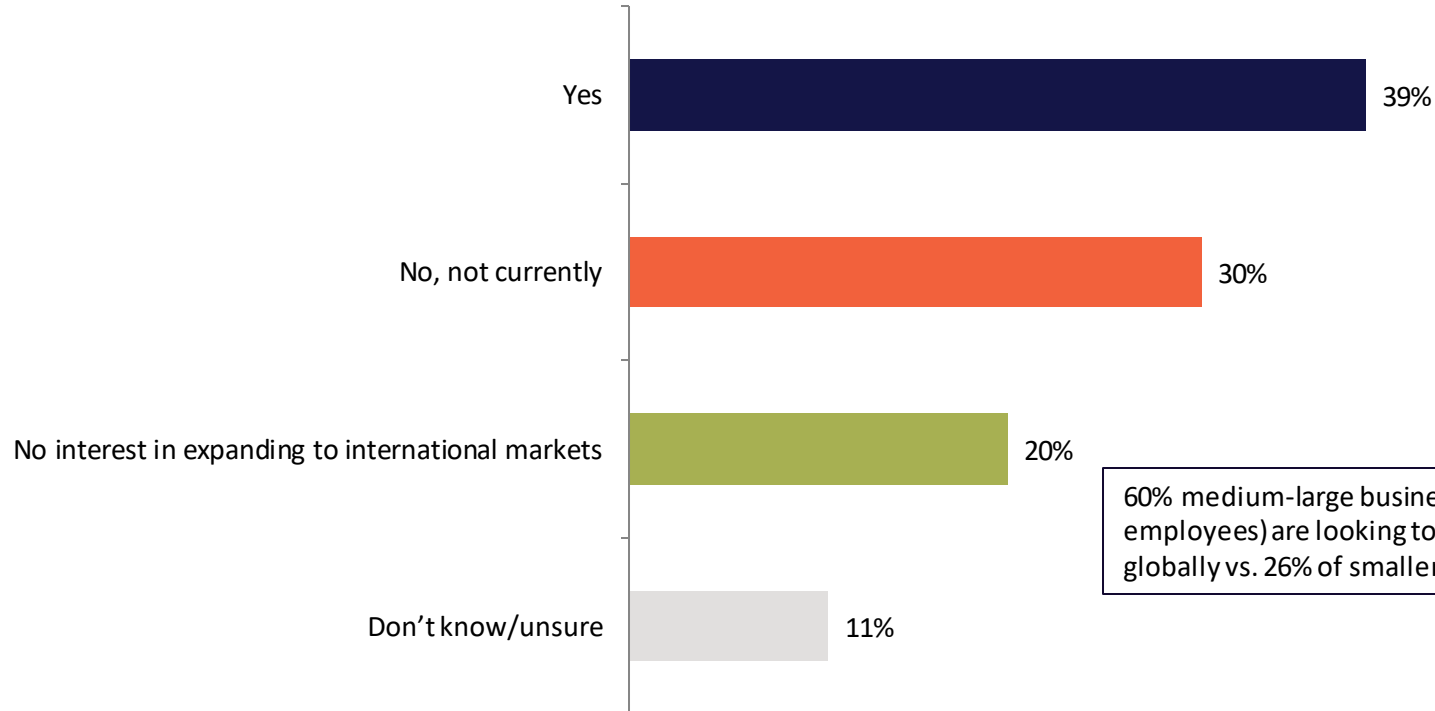
[>2% MENTIONS] Base: All respondents (n=379)



Interest in Expanding Business Activities Globally

Q2T: The Canadian government has emphasized the need to diversify Canada's trade with other countries beyond the United States. Is your business seeking to expand its activities to potential new global trade deals?

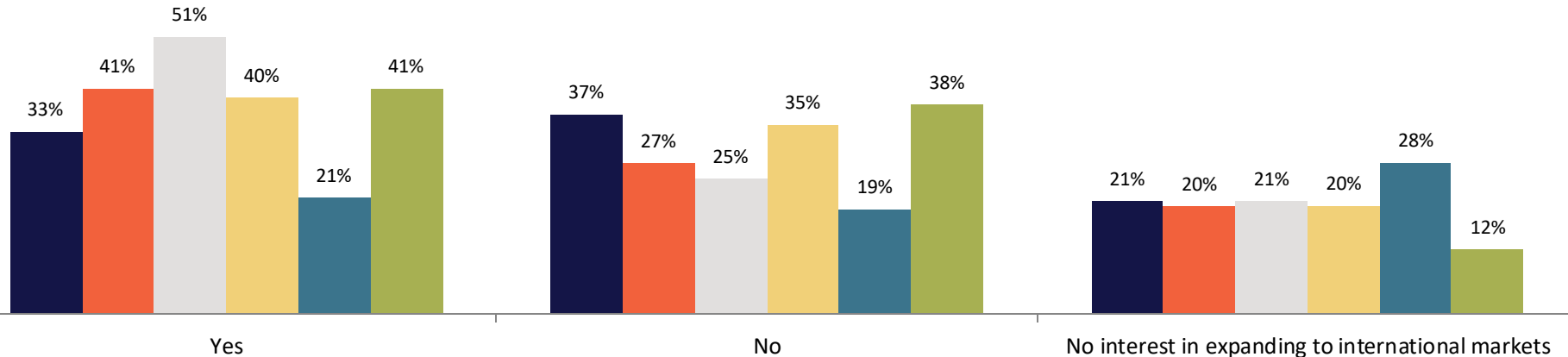
Base: All respondents (n=379)



Interest in Expanding Business Activities Globally – By Sector

Q2T: The Canadian government has emphasized the need to diversify Canada’s trade with other countries beyond the United States. Is your business seeking to expand its activities to potential new global trade deals?

Base: All respondents (n=379)



■ Consumer/ Retail/ Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

■ Restaurant/ Hospitality/ Tourism/ Recreation

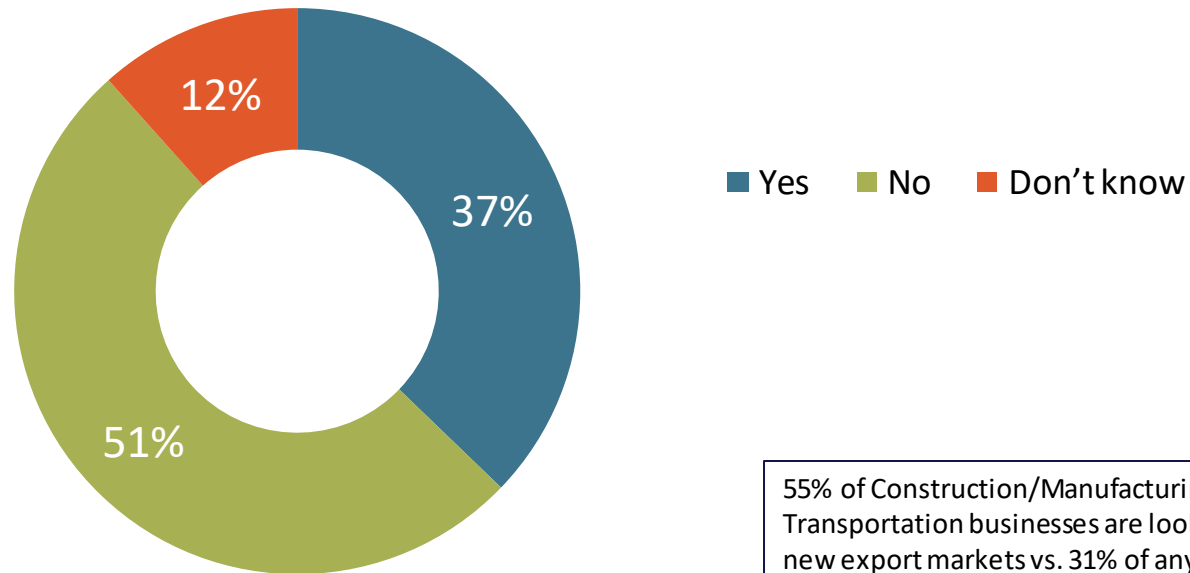
■ Professional Services/ Technology/ Communications

■ Education/ Healthcare/ Government/ Public Admin

Seeking New Export Markets

Q6T: Are you seeking new export markets in the next 12-18 months?

Base: All respondents (n=379)

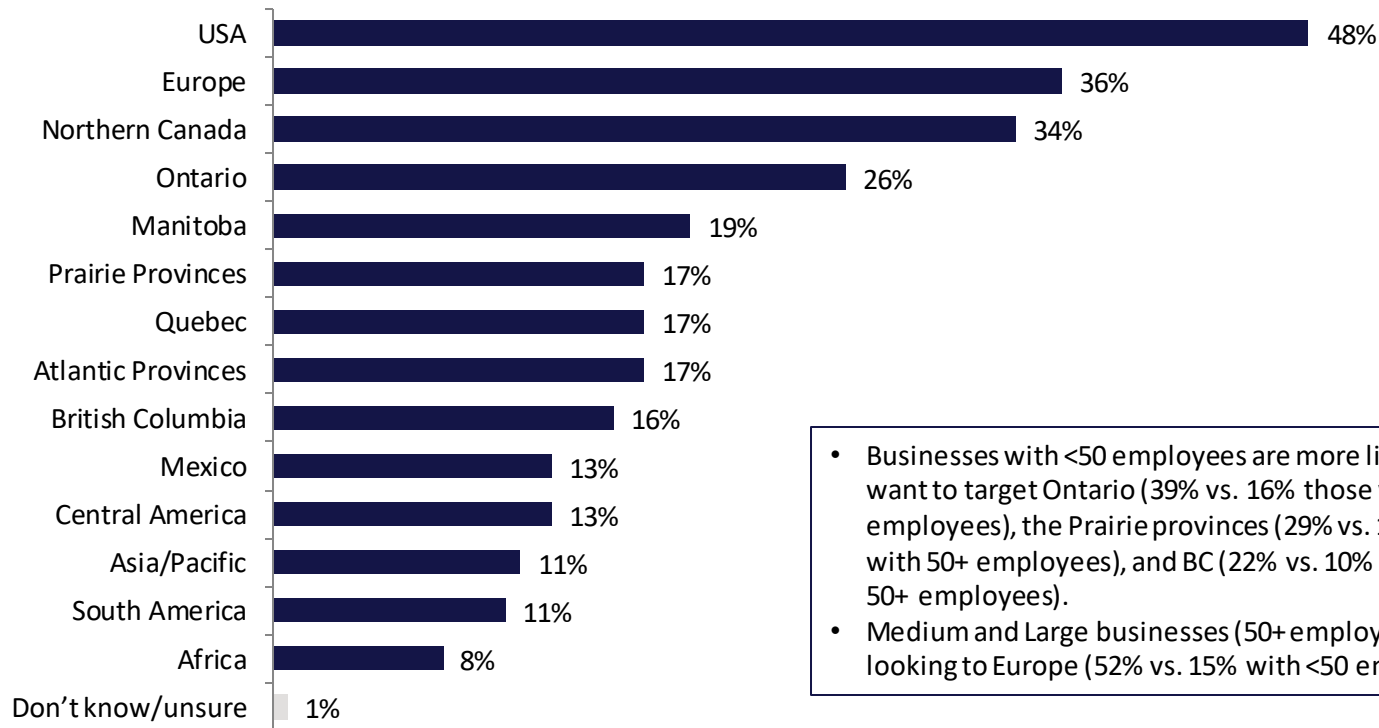


55% of Construction/Manufacturing/Agriculture/ Transportation businesses are looking to expand to new export markets vs. 31% of any other industry.

Priority New Export Markets

Q7T: If you are looking for new export markets, what are your top 3 priorities? [TOP 3 MENTIONS]

Base: Those looking to expand to new export markets (n=141)

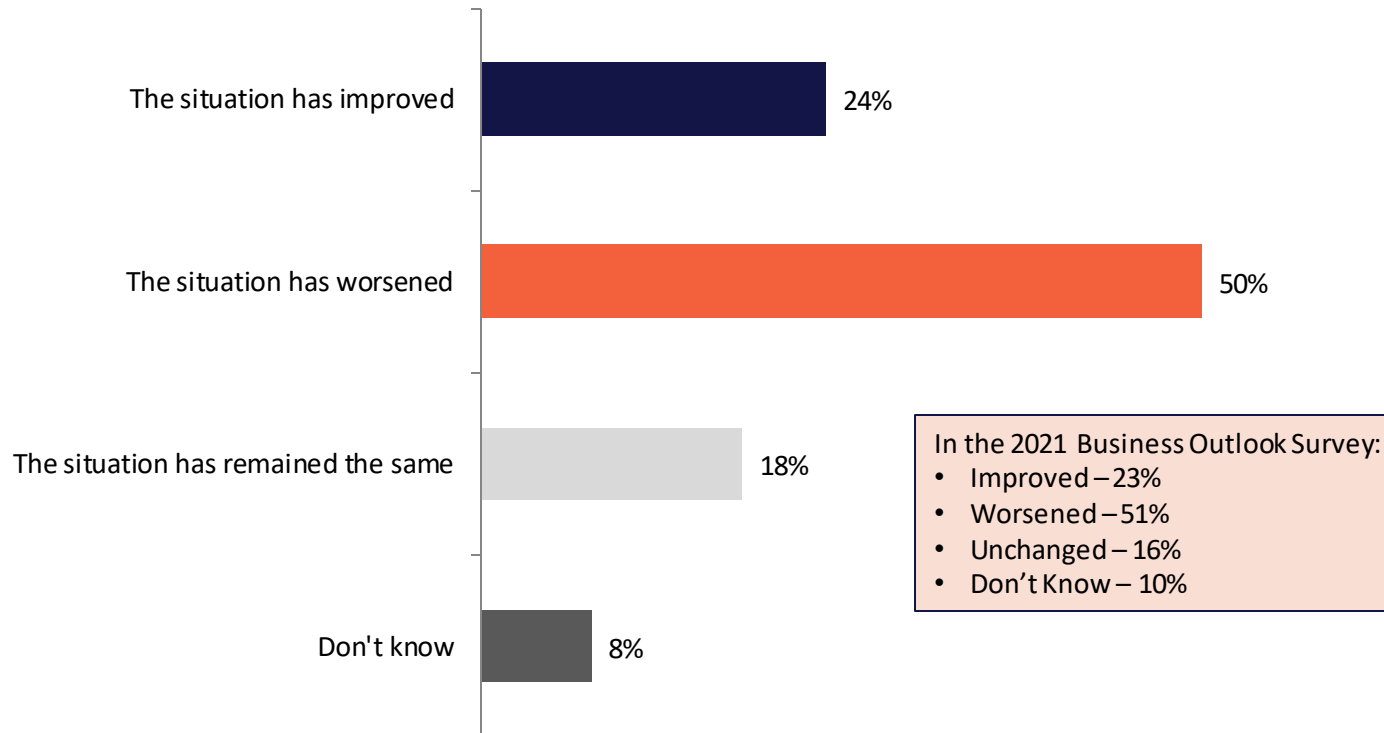


- Businesses with <50 employees are more likely to want to target Ontario (39% vs. 16% those with 50+ employees), the Prairie provinces (29% vs. 10% those with 50+ employees), and BC (22% vs. 10% those with 50+ employees).
- Medium and Large businesses (50+ employees) are looking to Europe (52% vs. 15% with <50 employees).

Labour Market Perceptions

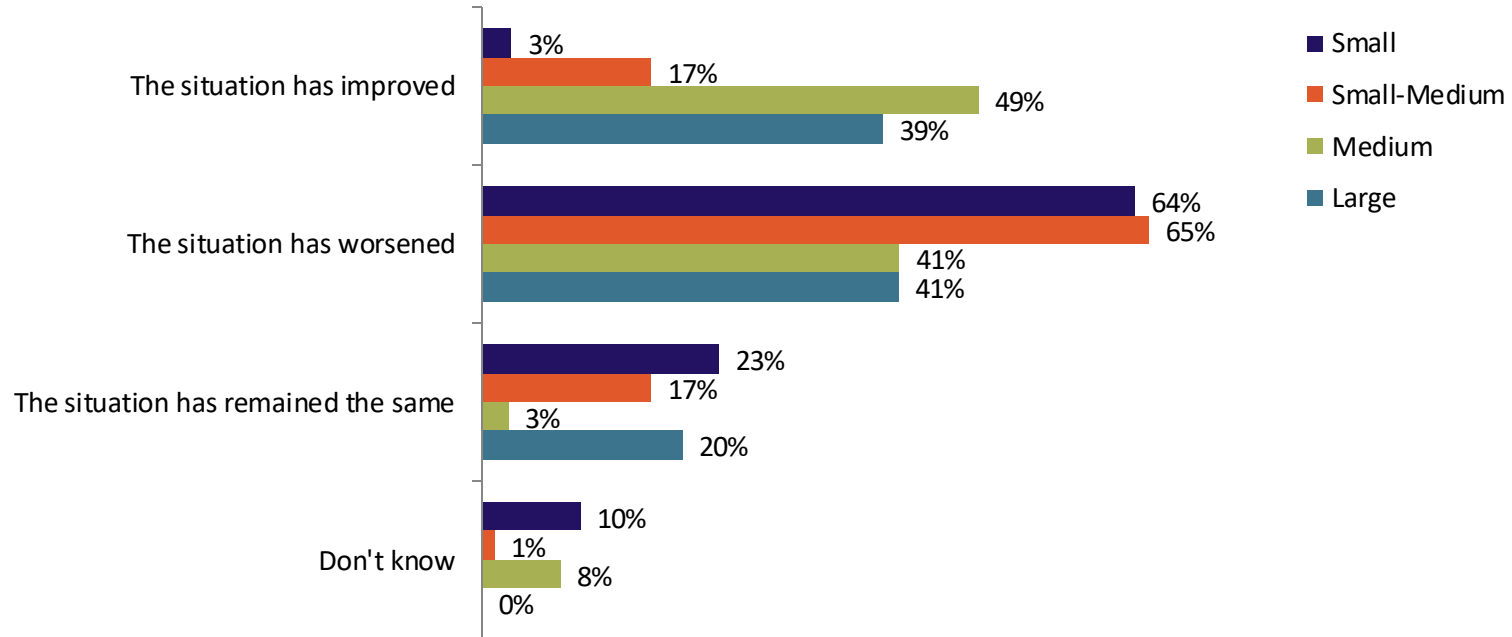
Access to Skilled Labour

Q19: In your opinion, has the situation related to access to skilled labour in Manitoba improved, worsened, or stayed the same compared to 2 to 3 years ago? Base: Respondents (n=379)



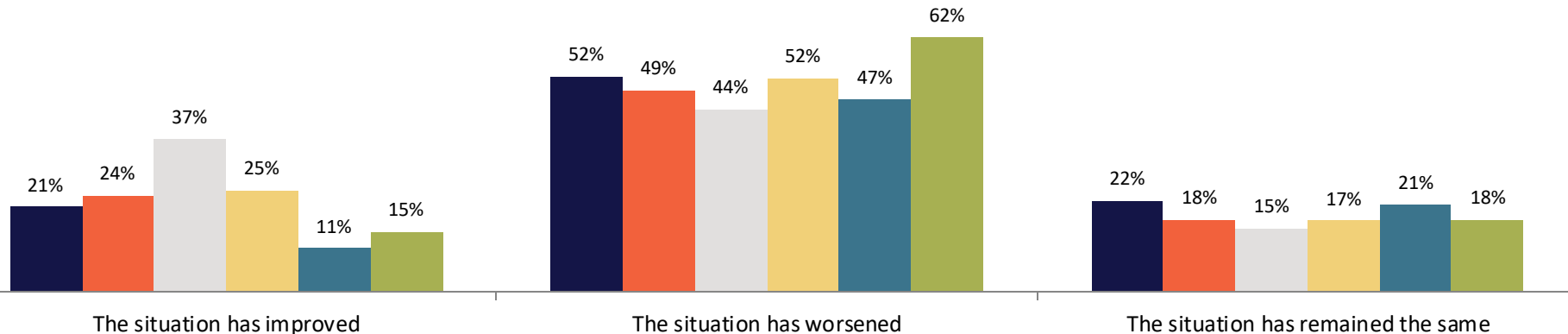
Access to Skilled Labour – By Employee Size

Q19: In your opinion, has the situation related to access to skilled labour in Manitoba improved, worsened, or stayed the same compared to 2 to 3 years ago? Base: Respondents (n=379)



Access to Skilled Labour – By Sector

Q19: In your opinion, has the situation related to access to skilled labour in Manitoba improved, worsened, or stayed the same compared to 2 to 3 years ago? Base: Respondents (n=379)



■ Consumer/ Retail/ Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

■ Restaurant/ Hospitality/ Tourism/ Recreation

■ Professional Services/ Technology/ Communications

■ Education/ Healthcare/ Government/ Public Admin

Barriers to Hiring Qualified Employees

Q20: What do you see as the most significant barriers to your ability to hire qualified employees in your business? (TOTAL MENTIONS) Base: Respondents (n=379)

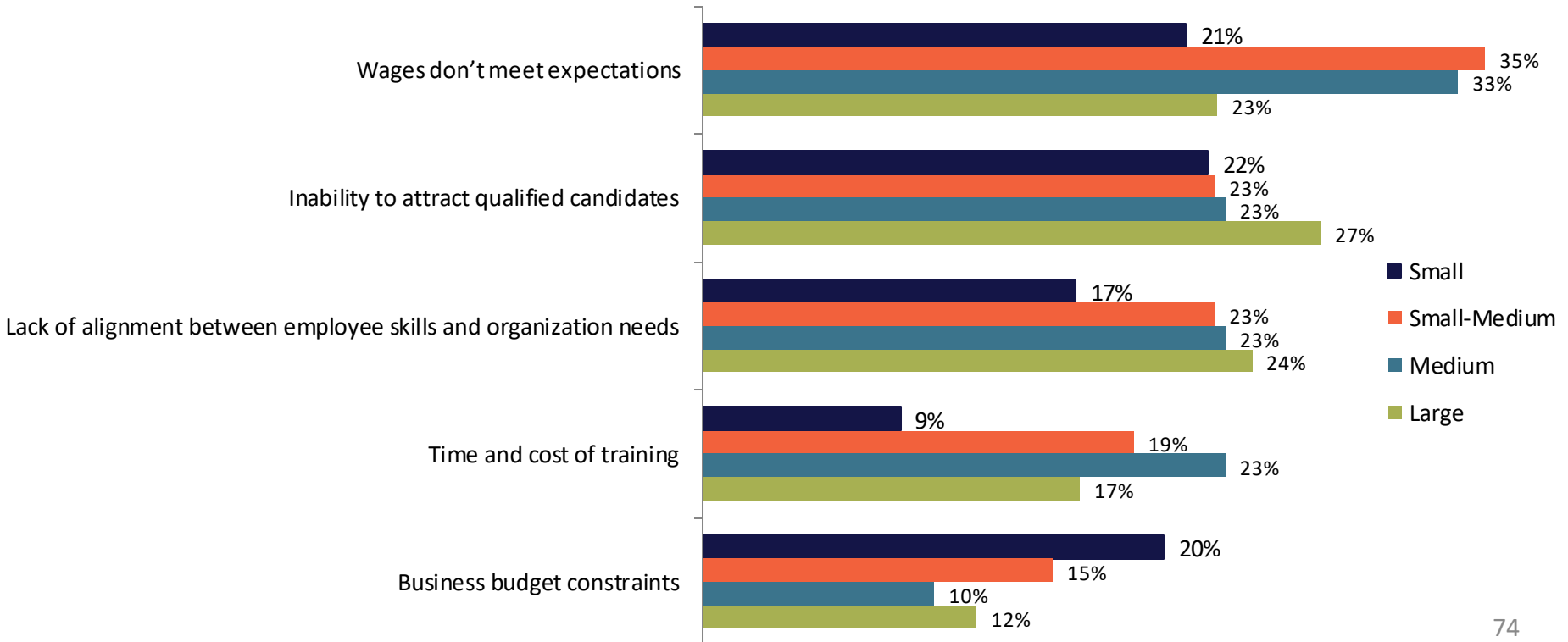


2021 Business Outlook Survey [Top 3 Results]:

- Inability to attract qualified candidates: 35%
- Wages don't meet expectations: 24%
- Alignment of current employee skills with needs: 19%

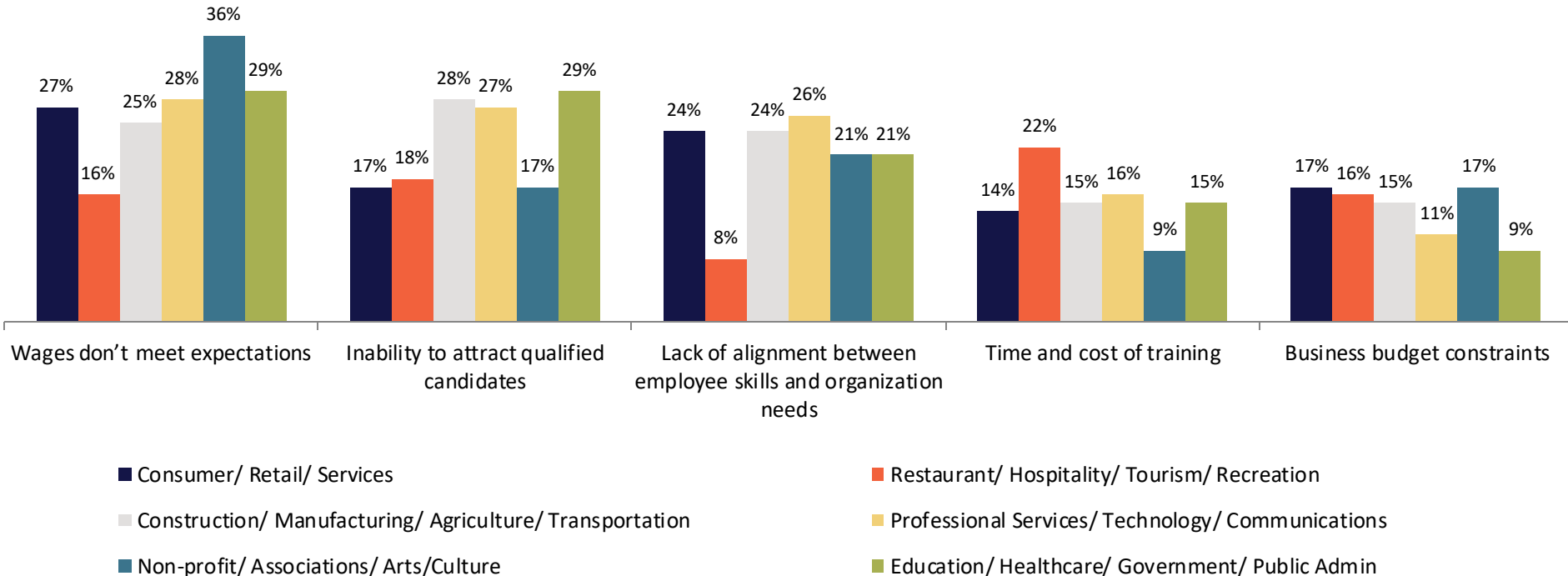
Barriers to Hiring Qualified Employees – By Employee Size

Q20: What do you see as the most significant barriers to your ability to hire qualified employees in your business? (TOTAL MENTIONS) [TOP 5 SELECTIONS] Base: Respondents (n=379)



Barriers to Hire Qualified Employees – By Sector

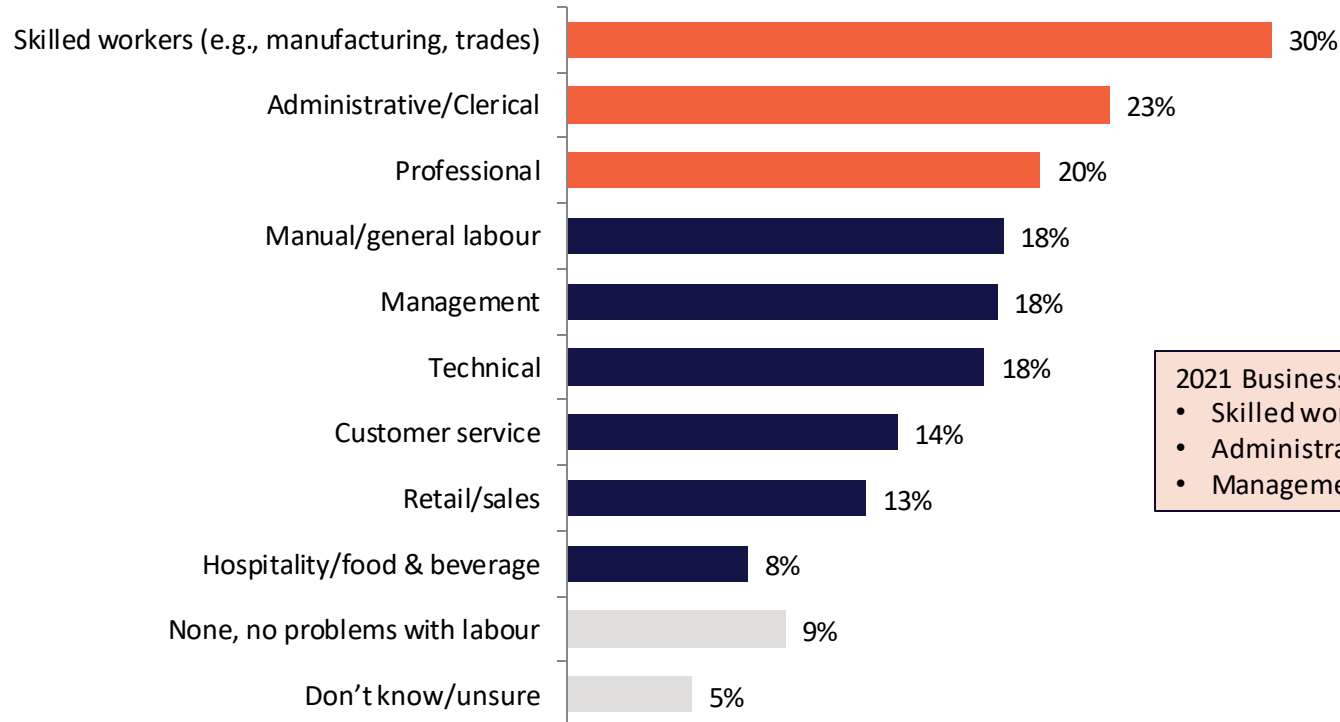
Q20: What do you see as the most significant barriers to your ability to hire qualified employees in your business? (TOTAL MENTIONS) [TOP FIVE SELECTIONS] Base: Respondents (n=379)



Difficult to Fill Positions

Q21: What positions is your organization having the most difficulty filling? [TOP TWO RANK]

Base: Respondents (n=379)



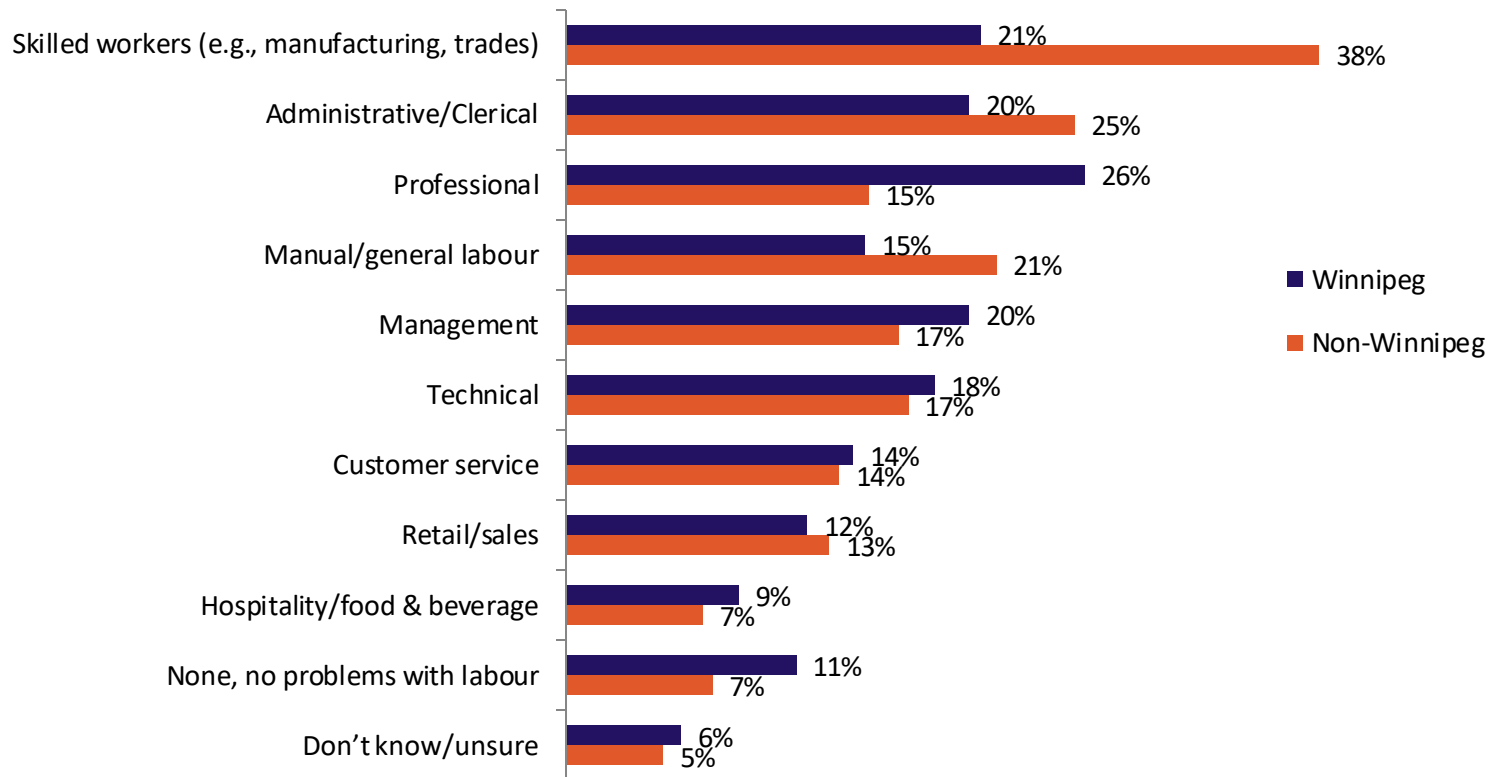
2021 Business Outlook Survey [Top 3 Results]:

- Skilled workers: 32%
- Administrative: 25%
- Management: 23%

Difficult to Fill Positions – By Region

Q21: What positions is your organization having the most difficulty filling? [TOP TWO RANK]

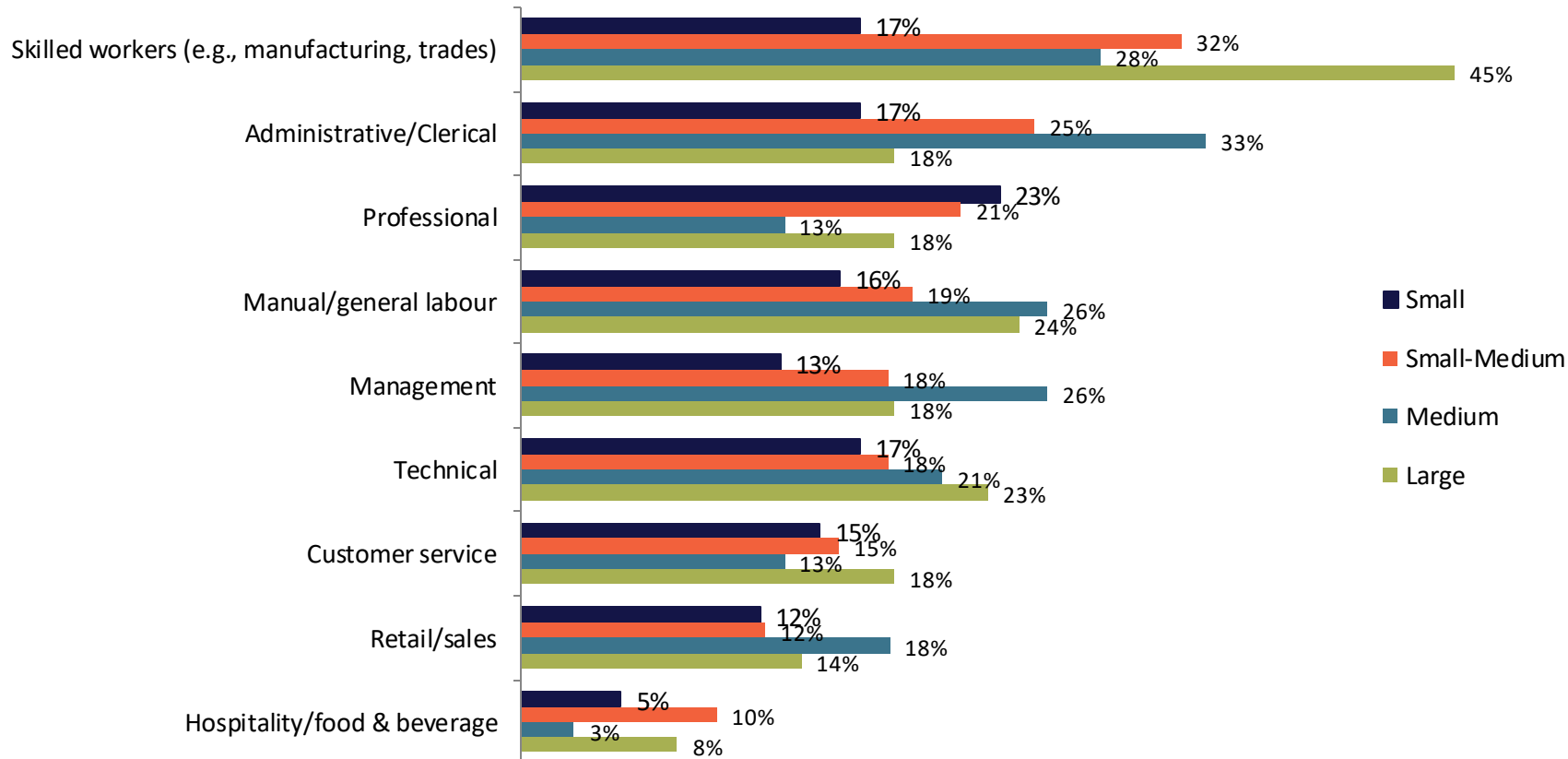
Base: Respondents (n=379)



Difficult to Fill Positions – By Employee Size

Q21: What positions is your organization having the most difficulty filling? [TOP TWO RANK]

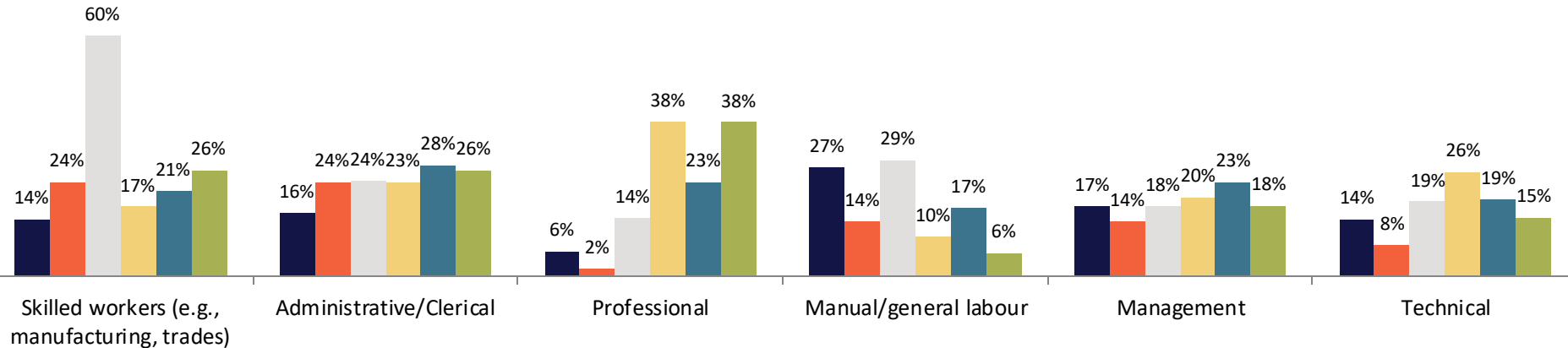
Base: Respondents (n=379)



Difficult to Fill Positions – by Sector

Q21: What positions is your organization having the most difficulty filling? [TOP TWO RANK] [TOP SIX SELECTIONS]

Base: Respondents (n=379)



■ Consumer/ Retail/ Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

■ Restaurant/ Hospitality/ Tourism/ Recreation

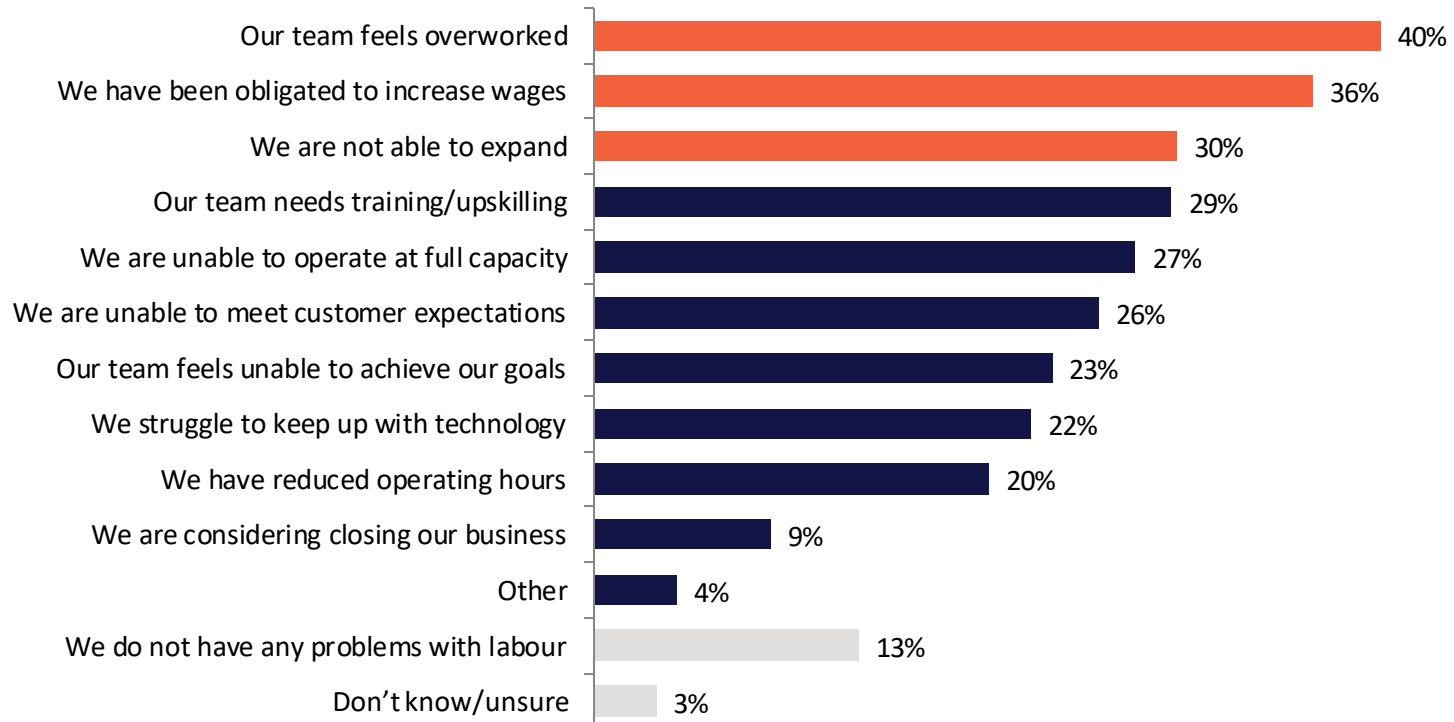
■ Professional Services/ Technology/ Communications

■ Education/ Healthcare/ Government/ Public Admin

Impact of Labour Shortages

Q1LM: What impact are workforce challenges and labour shortages having on your business or organization?

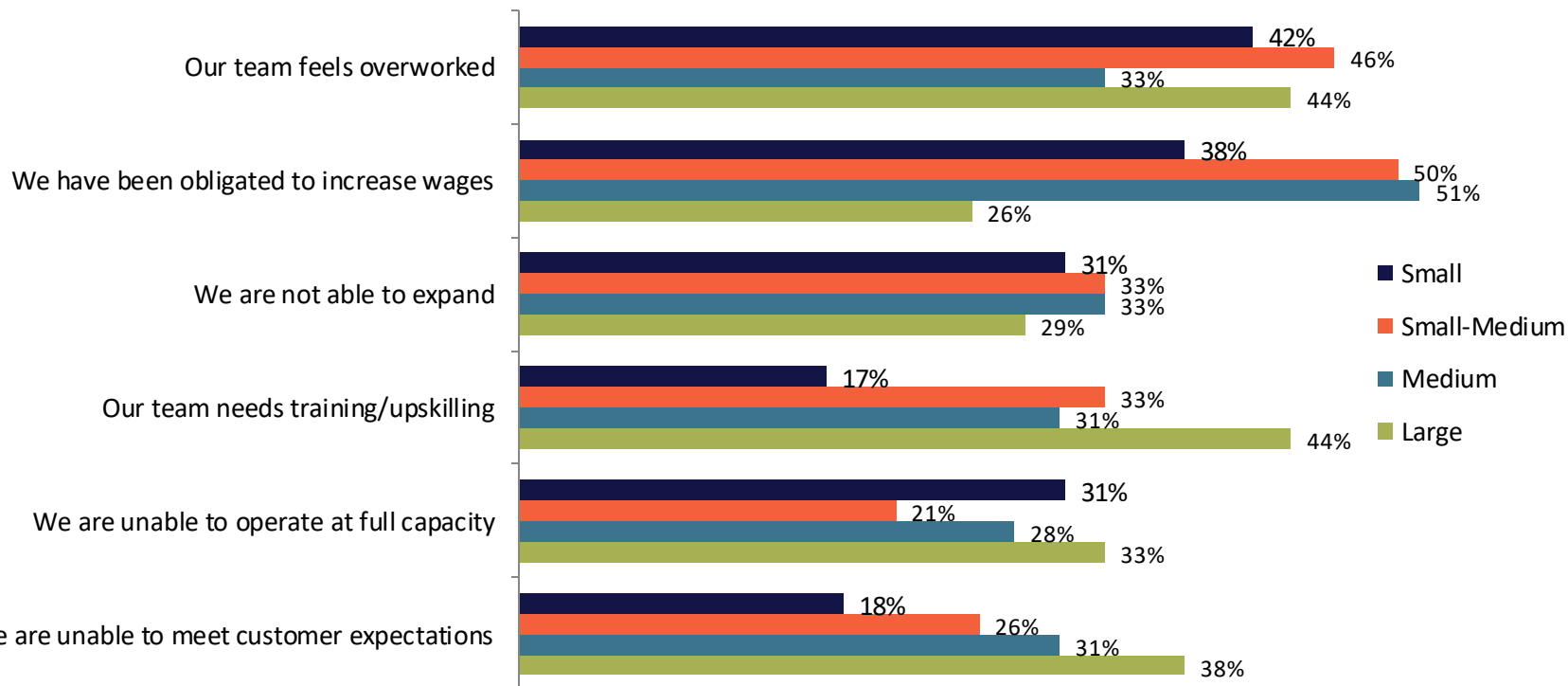
Base: Respondents (n=379)



Impact of Labour Shortages – By Employee Size

Q1LM: What impact are workforce challenges and labour shortages having on your business or organization?

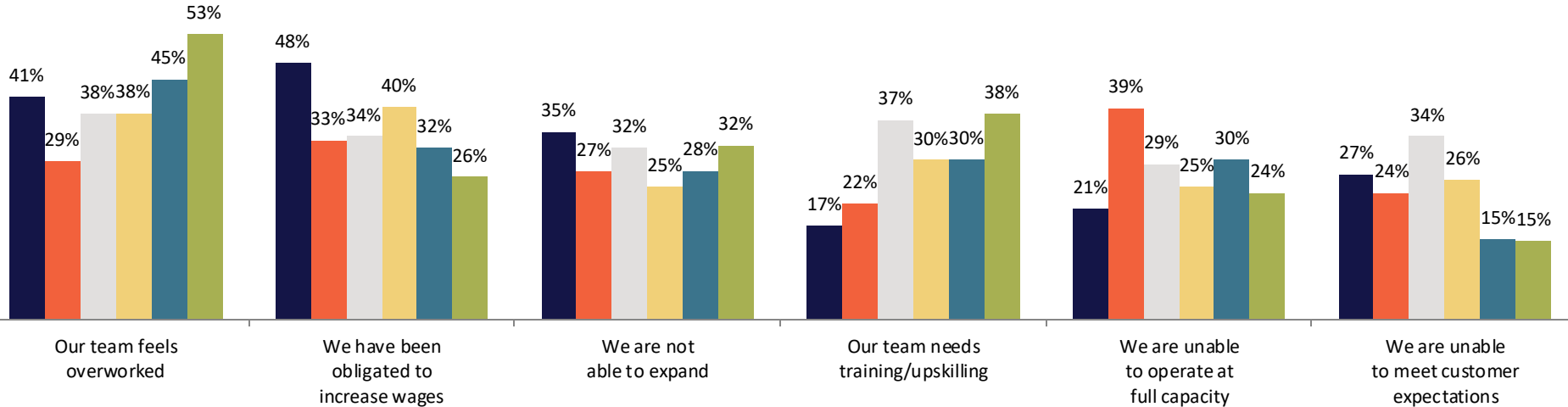
[TOP 6 RESPONSES] Base: Respondents (n=379)



Impact of Labour Shortages – by Sector

Q1LM: What impact are workforce challenges and labour shortages having on your business or organization?

[TOP 6 RESPONSES] Base: Respondents (n=379)



■ Consumer/ Retail/ Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

■ Restaurant/ Hospitality/ Tourism/ Recreation

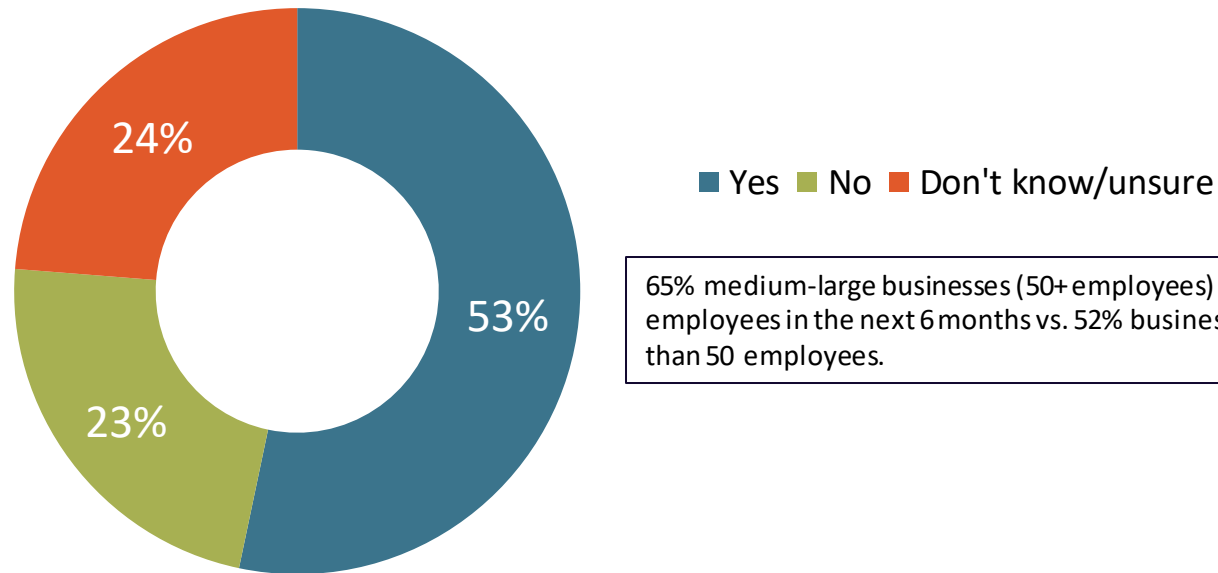
■ Professional Services/ Technology/ Communications

■ Education/ Healthcare/ Government/ Public Admin

Hiring New Workforce

Q2LM: Is your business or organization planning to hire new employees in the next six months?

Base: Respondents (n=379)

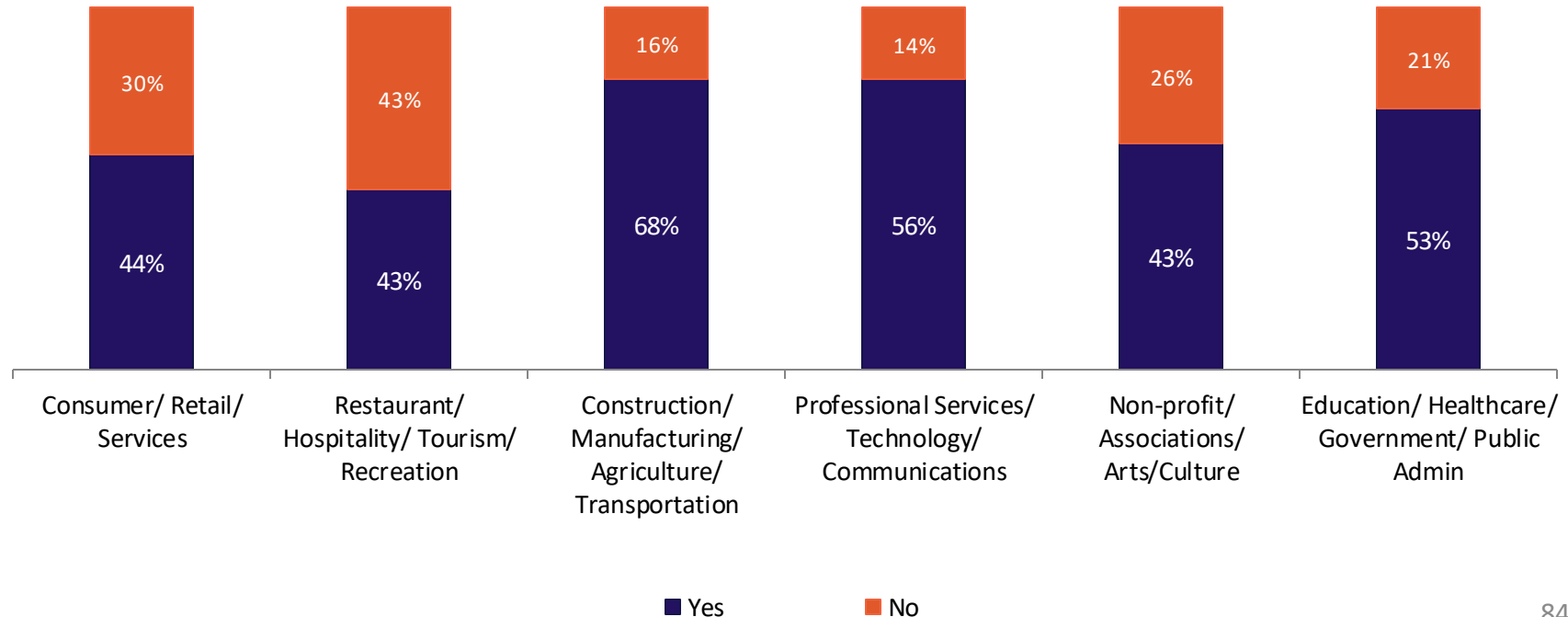


65% medium-large businesses (50+ employees) plan to hire new employees in the next 6 months vs. 52% businesses with less than 50 employees.

Hiring New Workforce - By Sector

Q2LM: Is your business or organization planning to hire new employees in the next six months?

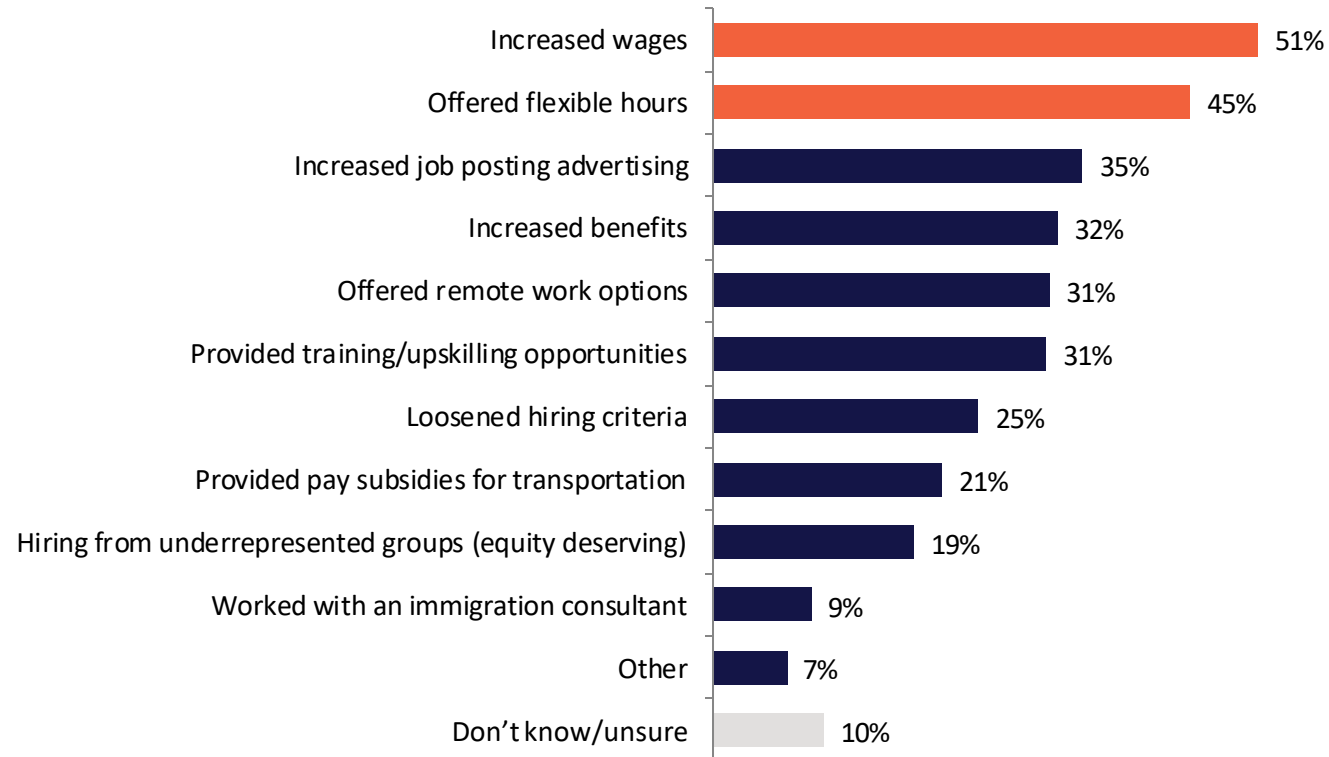
Base: Respondents (n=379)



Actions to Retain Employees

Q3LM. What actions has your organization taken in the last 12 months to recruit and retain employees?

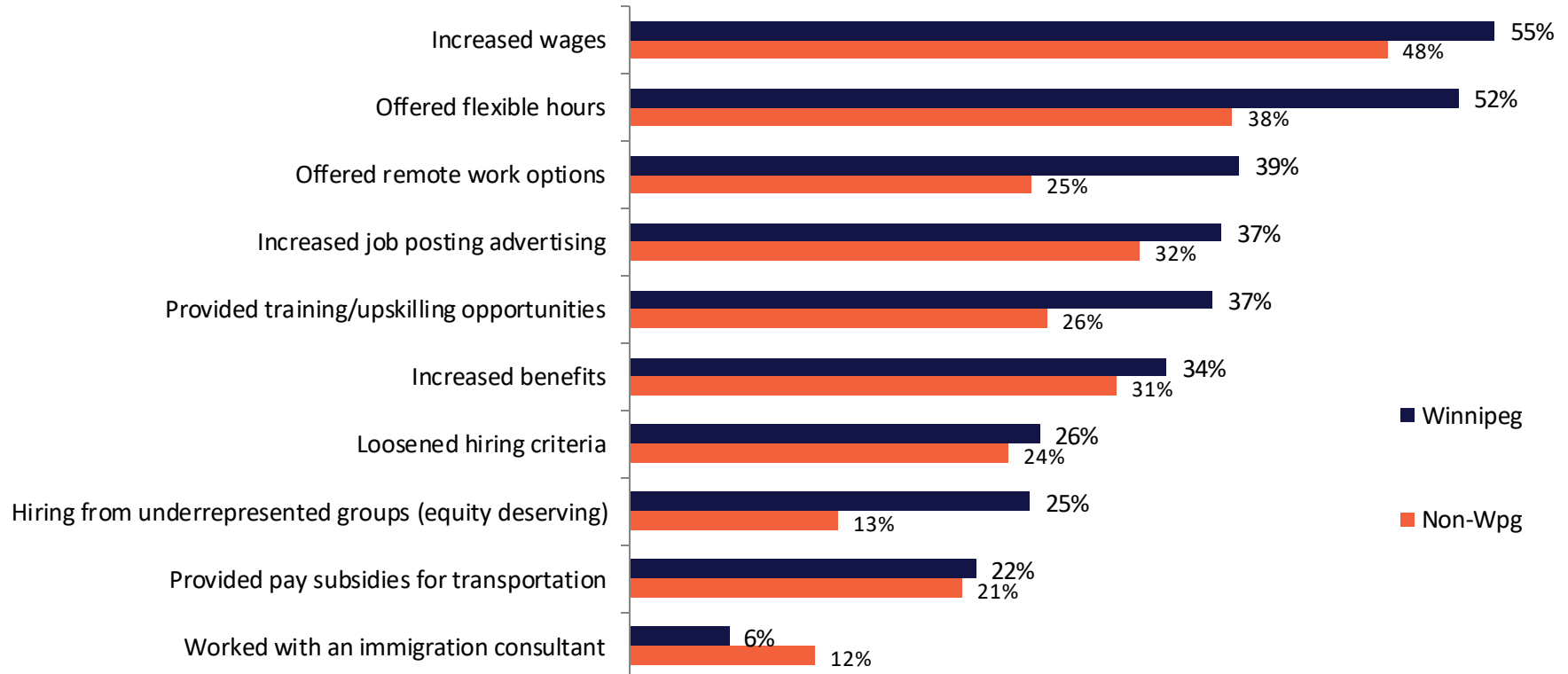
Base: Respondents (n=379)



Actions to Retain Employees – By Region

Q3LM. What actions has your organization taken in the last 12 months to recruit and retain employees?

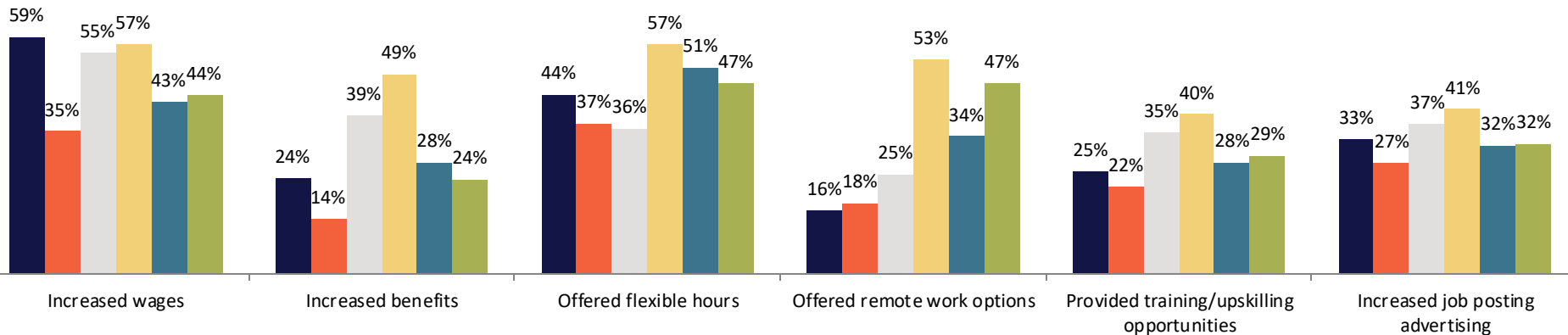
Base: Respondents (n=379)



Actions to Retain Employees – By Sector

Q3LM. What actions has your organization taken in the last 12 months to recruit and retain employees? [TOP 6]

Base: Respondents (n=379)



■ Consumer/ Retail/ Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

■ Restaurant/ Hospitality/ Tourism/ Recreation

■ Professional Services/ Technology/ Communications

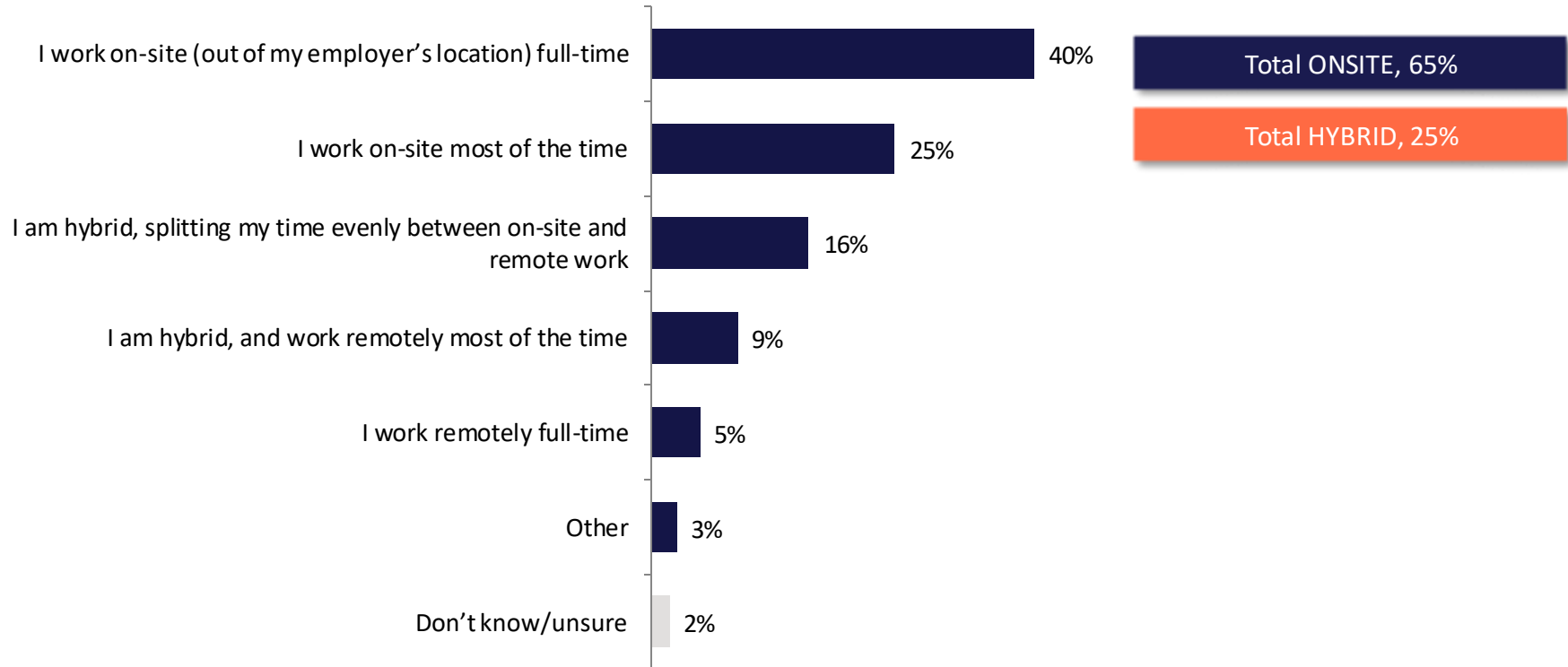
■ Education/ Healthcare/ Government/ Public Admin

Return to Work

Work Location Situation

Q1RTW: What statement best describes your work situation?

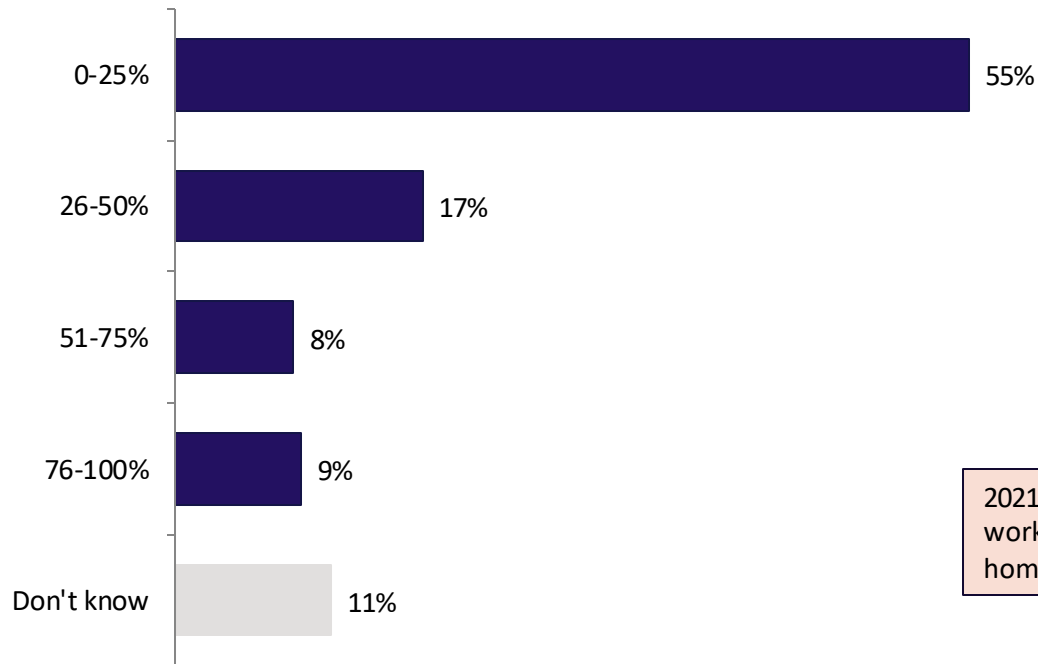
Base: All Respondents (n=379)



Proportion of Employees Working From Home

Q22A: What proportion of your organization's workforce is predominantly working remotely?

Base: All Respondents (n=379)



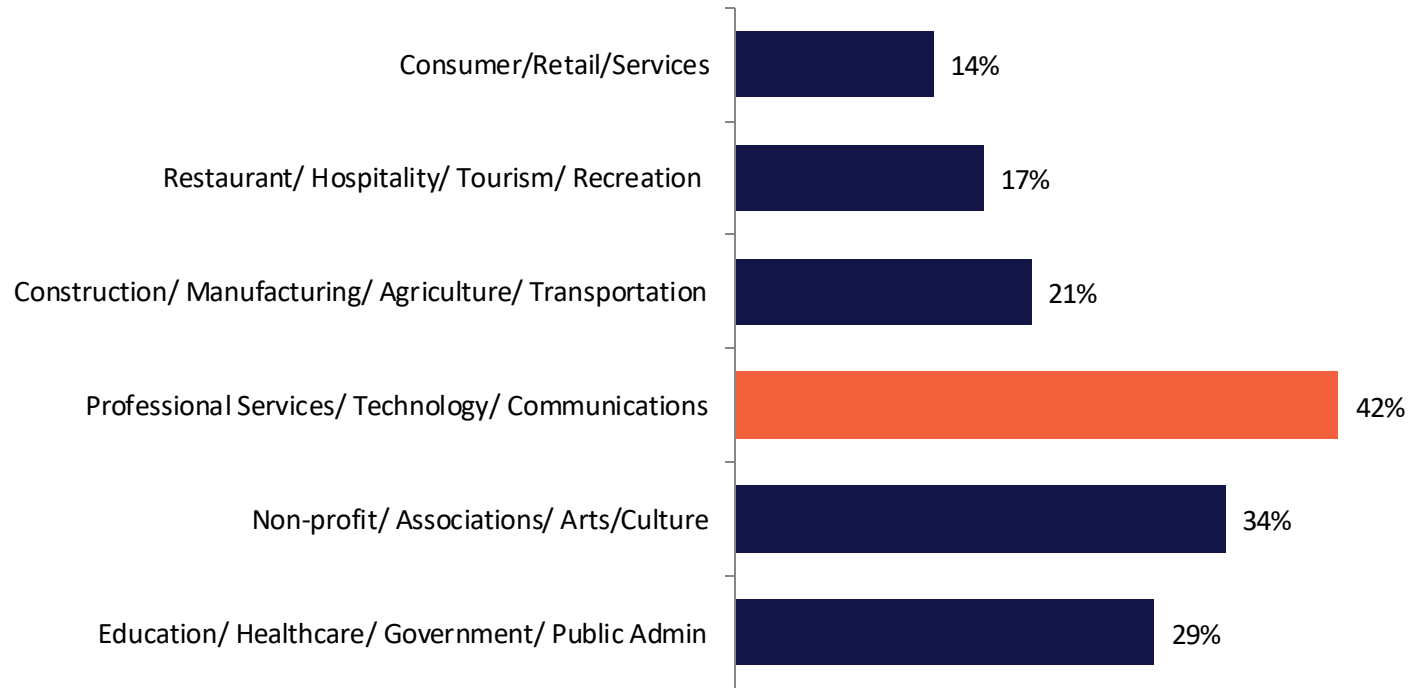
Average Predominantly Working From Home: 26%

2021, on average, 40% of a company's workforce were working predominantly from home.

Proportion of Employees Working From Home – By Sector

Q22A: What proportion of your organization’s workforce is predominantly working remotely? [MEAN]

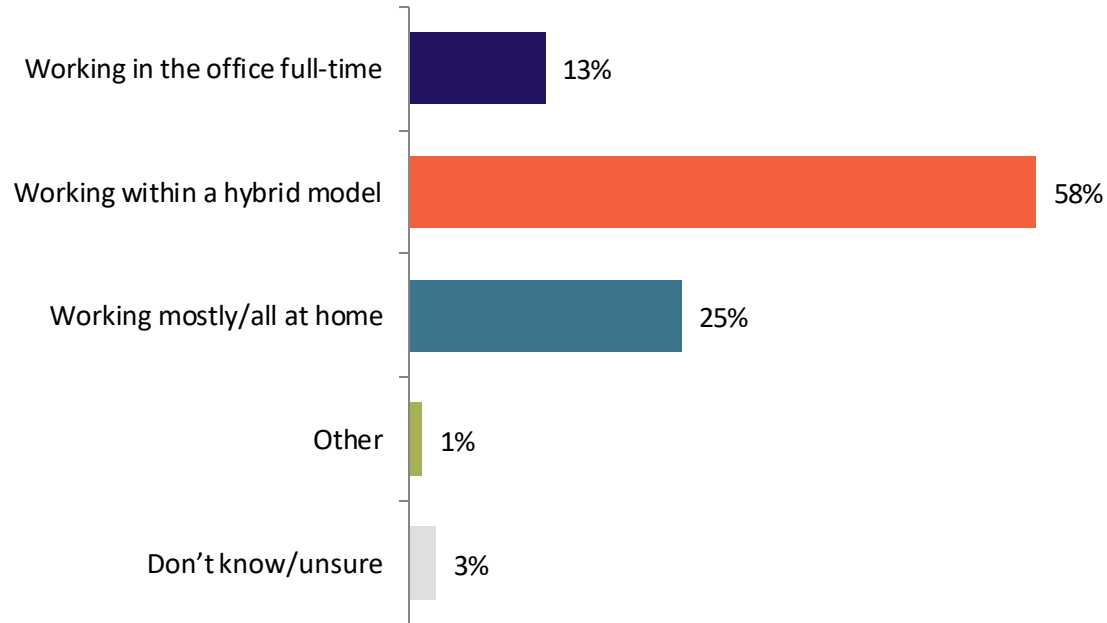
Base: All Respondents (n=379)



Return to Work Expectations

Q2RTW: Thinking of the next 12 months, will your workforce be.....?

Base: Those who say more than 50% are working remotely (n=79)

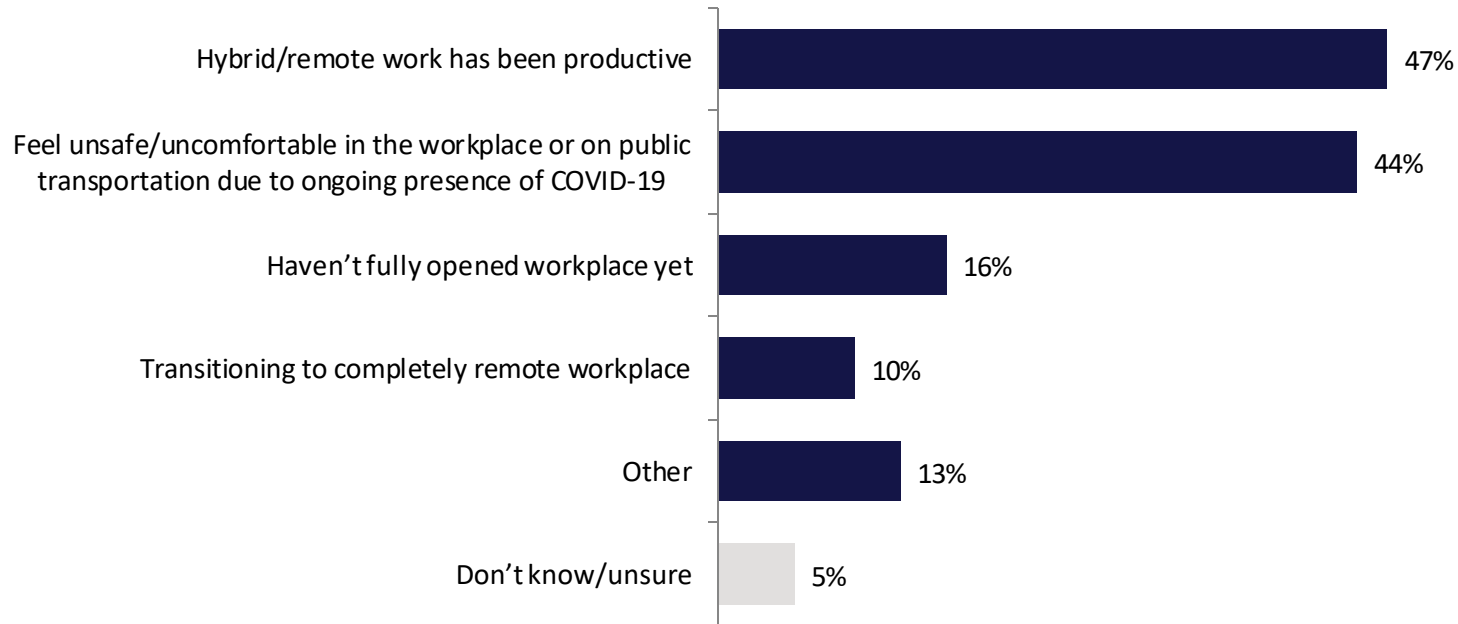


- Working in the office full-time is a stronger possibility outside Winnipeg (21% vs. 7% in Winnipeg).

Reasons for Continuing Hybrid/Remote Work

Q3RTW: In your opinion why have some/all of your organization's employees not returned to the workplace?

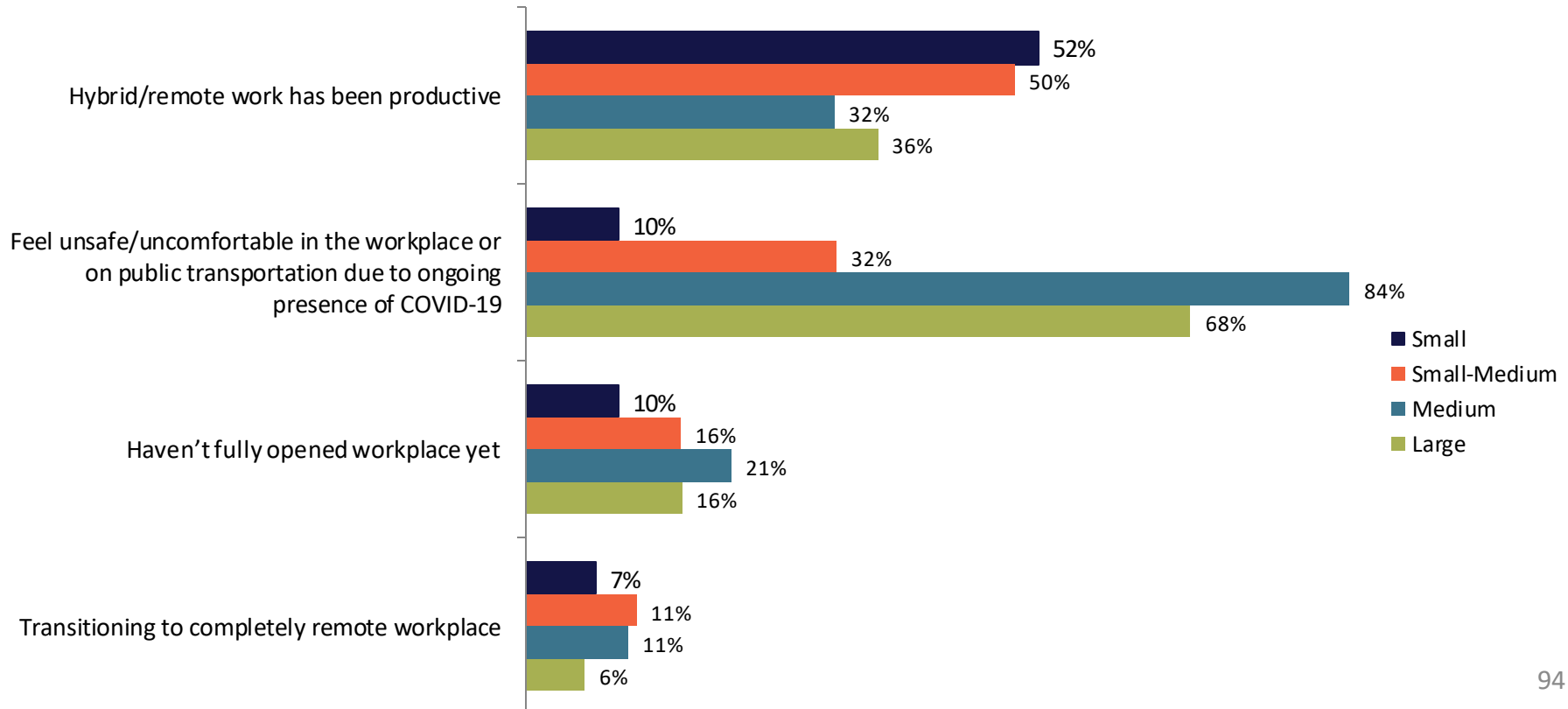
Base: Those who say more than 10% are working remotely (n=189)



Reasons for Continuing Hybrid/Remote Work – By Employee Size

Q3RTW: In your opinion why have some/all of your organization's employees not returned to the workplace?

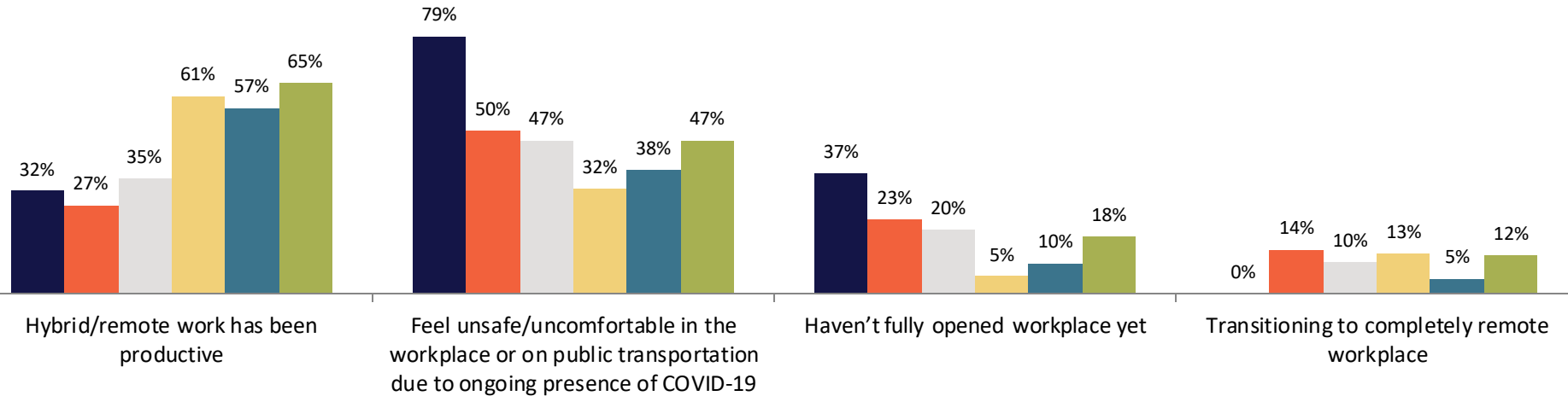
Base: Those who say more than 10% are working remotely (n=189)



Reasons for Continuing Hybrid/Remote Work – By Sector

Q3RTW: In your opinion why have some/all of your organization’s employees not returned to the workplace?

Base: Those who say more than 10% are working remotely (n=189)



■ Consumer/ Retail/ Services

■ Construction/ Manufacturing/ Agriculture/ Transportation

■ Non-profit/ Associations/ Arts/Culture

■ Restaurant/ Hospitality/ Tourism/ Recreation

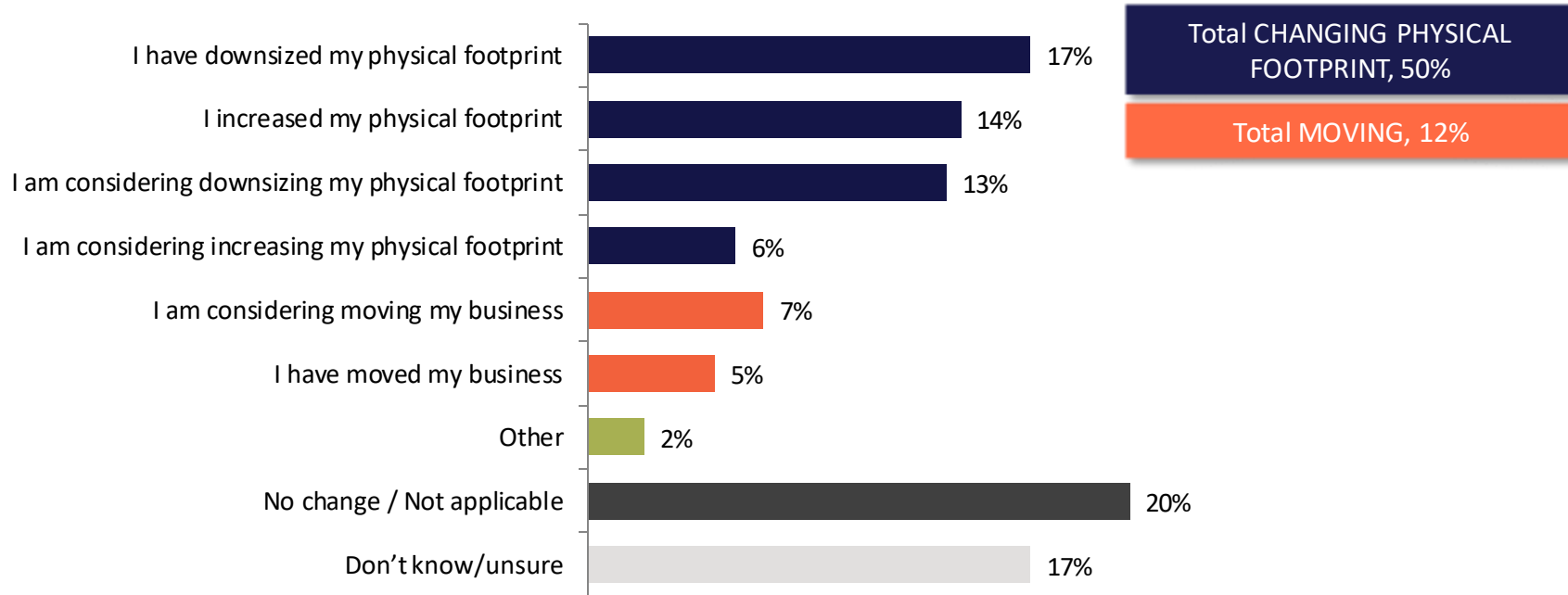
■ Professional Services/ Technology/ Communications

■ Education/ Healthcare/ Government/ Public Admin

Changed Physical Size/Location of Business Due to Pandemic

Q1RE: Has the pandemic led you to change the physical size or location of your business?

Base: All Respondents (n=379)



- Medium and large businesses (50+ employees) are three times as likely to have downsized their physical footprint due to the pandemic (30% vs. 10% businesses with <50 employees), although they are also twice as likely to have increased their physical footprint (20% vs. 10% businesses with <50 employees).
- Businesses with <50 employees are significantly more likely to be considering moving (8% vs. 1% businesses with 50+ employees).

2022 Manitoba Business Outlook Survey

