Report

2019 Manitoba Chambers of Commerce Business Outlook Survey

MANITOBA CHAMBERS OF COMMERCE

Leger

We know Canadians

DATE 2019-12-08 **PROJECT NUMBER** 45 895-001

Methodology

METHODOLOGY

The Manitoba Chambers of Commerce (MCC) retained Leger Market Research to conduct the 2nd 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.

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 40 questions, in addition to 16 Sponsorship questions. In total, the survey took approximately 20-25 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 of 5,986 members. From this database, 400 successfully completed the survey, which represents 7% response rate. Since the research is conducted online, 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 400 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 5th, 2019. After the test, the survey tool was available online from November 5th to 22nd, 2019. A total of 3 reminder emails were sent to members during the data collection period, along with 2 email reminders from Chamber Staff.

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.
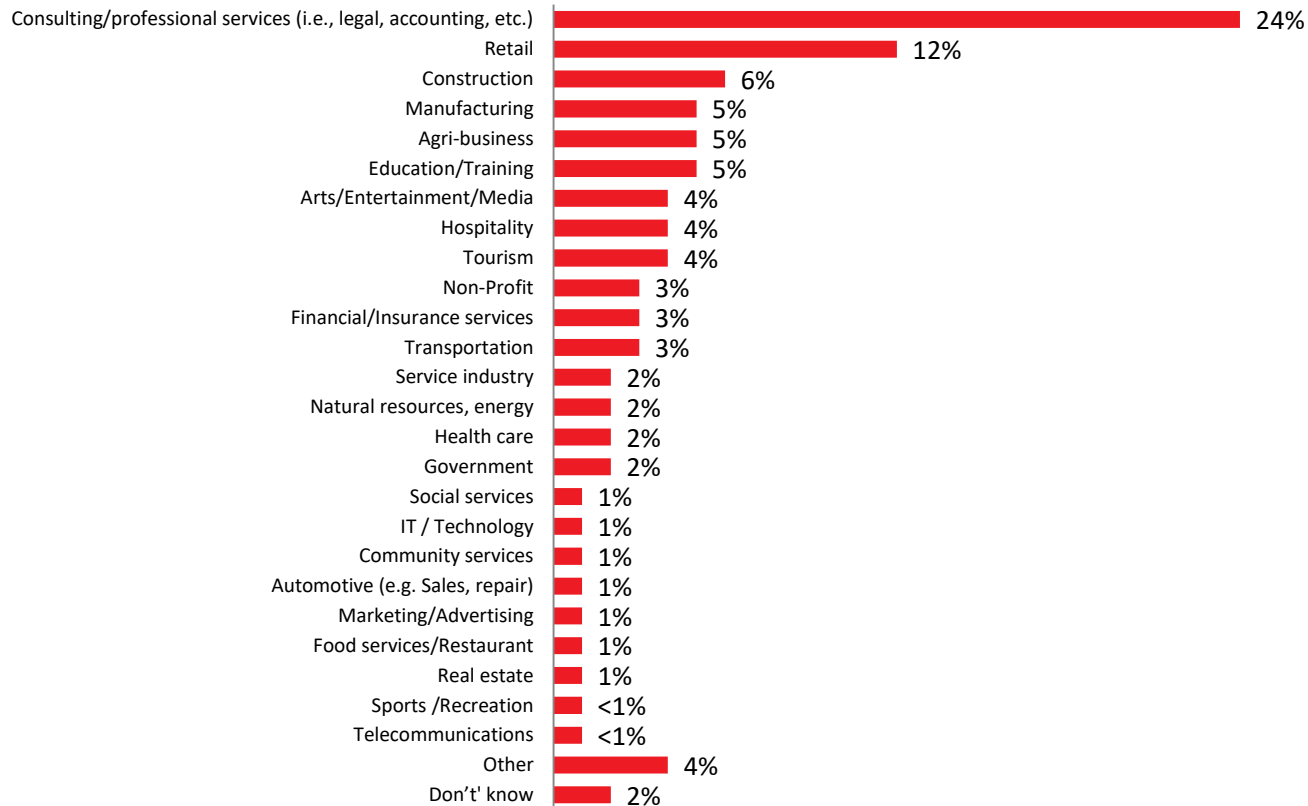
SURVEY RESPONDENT PROFILE

Variable	% of n=400	Variable	% of n=400	Variable	% of n=400
Region		**Employee Size – Full Time**		**Employee Size – Part Time**	
Winnipeg	49	0 to less than 10	47	0 to less than 10	66
Northern Manitoba	9	11 to less than 25	12	11 to less than 25	6
Eastern Manitoba	5	26 to less than 50	10	26 to less than 50	4
Western Manitoba	20	51 to less than 100	6	51 to less than 100	3
Southern Manitoba	17	101 to less than 500	8	101 to less than 500	4
		501+	2	501+	1
Winnipeg	49	Unsure/NA	16	Unsure/NA	16
Non-Winnipeg	51				
		Head Office		**Unionized**	
		Manitoba	85	Yes	18
		In Canada	11	No	79
		Outside of Canada	3		

SURVEY RESPONDENT PROFILE

Q32: Principal Business Type

Base: All respondents (n=400)

| Business Type	Percentage
Consulting/professional services (i.e., legal, accounting, etc.)	24%
Retail	12%
Construction	6%
Manufacturing	5%
Agri-business	5%
Education/Training	5%
Arts/Entertainment/Media	4%
Hospitality	4%
Tourism	4%
Non-Profit	3%
Financial/Insurance services	3%
Transportation	3%
Service industry	2%
Natural resources, energy	2%
Health care	2%
Government	2%
Social services	1%
IT / Technology	1%
Community services	1%
Automotive (e.g. Sales, repair)	1%
Marketing/Advertising	1%
Food services/Restaurant	1%
Real estate	1%
Sports /Recreation	<1%
Telecommunications	<1%
Other	4%
Don't' know	2%

Research Findings

Business Performance and Outcomes

Mood of Business Leaders in Manitoba

Q1: In your opinion, as a businessperson, do you feel our economy, labour market, and government program and policies overall are heading in the right direction, or are we on the wrong track?

Base: All respondents (n=400)
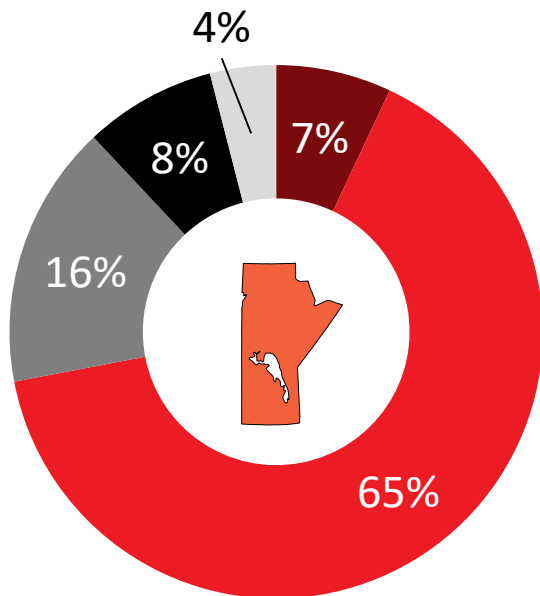
- **Strongly right direction**
- **Somewhat right direction**
- **Somewhat off track**
- **Strongly off track**
- **Don't know / Prefer not to answer**

Total RIGHT DIRECTION, 72%

Total OFF TRACK, 24%

Compared to 2018, seventy-one percent (71%) of members said that province was heading in the (Strongly/Somewhat) *Right Direction*. This represents an increase of 1 point since last year.

Winnipeg businesses are more likely to say things are going in the Right Direction (77%) compared to non-Winnipeg based companies (67%).

Larger businesses with 26 employees or more are more likely to say things are going in the Right Direction (80%) compared to smaller companies with 10 employees or less (67%).

Greatest Challenging Facing Company in Next 12-18 months

Q2. Thinking about the next 12 to 18 months, what do you see as the greatest challenge facing your organization? Please provide your response in the space below [MORE FREQUENTLY SELECTED CHALLENGES].

Base: All respondents (n=400)

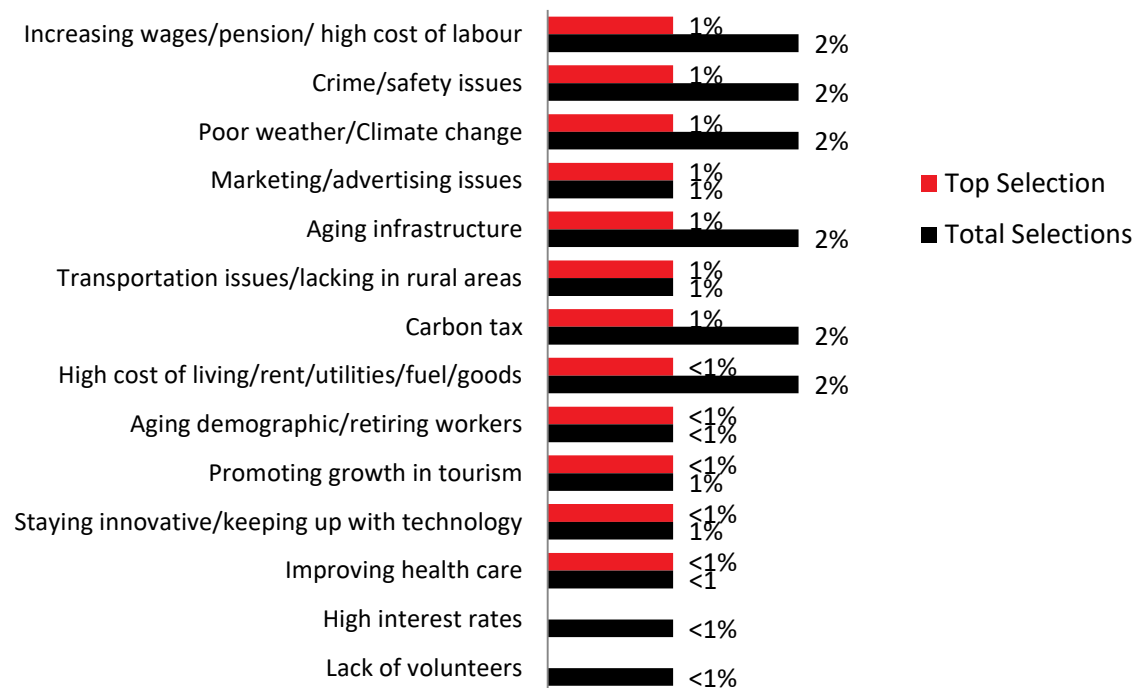| Challenge	Top Selection	Total Selections
Hiring/retaining qualified staff	23%	27%
Economic uncertainty/downturn/trade issues	7%	10%
Access to capital/cash flow/grants/financing	7%	8%
Business growth/expanding client base/upgrading	6%	8%
Too much red tape/bureaucracy	6%	8%
Staying competitive in the market	5%	7%
Government spending/budget cuts	4%	7%
Increasing sales/profit margins	4%	6%
Tax burden	2%	3%
Other	6%	6%
Nothing/No challenges	8%	8%
Don't know	11%	11%

The *Hiring/Staff retention* issue was a most frequently mentioned issue in 2018. References to *Economic uncertainty/Downturn/Trade* issue increased in the frequency of mentions by 4 points.

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Greatest Challenging Facing Company in Next 12-18 months

Q2. Thinking about the next 12 to 18 months, what do you see as the greatest challenge facing your organization? Please provide your response in the space below [LESS FREQUENT CHALLENGES].

Base: All respondents (n=400)

Legend:
- ■ Top Selection (red)
- ■ Total Selections (black)

Challenge	Top Selection	Total Selections
Increasing wages/pension/ high cost of labour	1%	2%
Crime/safety issues	1%	2%
Poor weather/Climate change	1%	2%
Marketing/advertising issues	1%	1%
Aging infrastructure	1%	2%
Transportation issues/lacking in rural areas	1%	1%
Carbon tax	1%	2%
High cost of living/rent/utilities/fuel/goods	<1%	2%
Aging demographic/retiring workers	<1%	<1%
Promoting growth in tourism	<1%	1%
Staying innovative/keeping up with technology	<1%	1%
Improving health care	<1%	<1
High interest rates		<1%
Lack of volunteers		<1%

Employment Growth Expectations in 2020

Q3. Thinking about 12 months from now, do you expect the number of people employed by your organization will be…?
Base: All respondents (n=400)
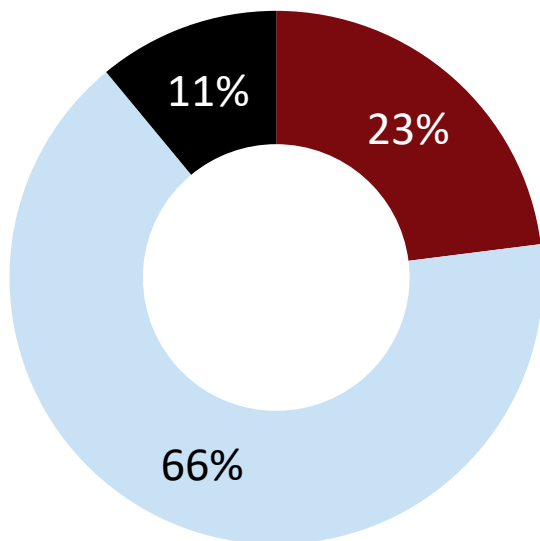
Larger

About the same

Smaller

23%

66%

11%

Compared to 2018, just over two-thirds (67%) of members felt they will have the same number of staff a year from now, which is one point down from last year. Also in 2018, twenty-seven (27%) of members expected their staff to increase in size, which was 4 points higher to this year.

Large Businesses, with 26 or more employees, are more likely to say they will experience employment growth 12 months from now – 39% compared to smaller companies of 10 employees or less.

Winnipeg-based businesses are more likely to say they will experience employment growth (32%) compared to non-Winnipeg based businesses (15%)

Revenue Growth in 2019

Q4. What type of revenue growth do you anticipate for your organization in 2019?

Base: All respondents (n=400)
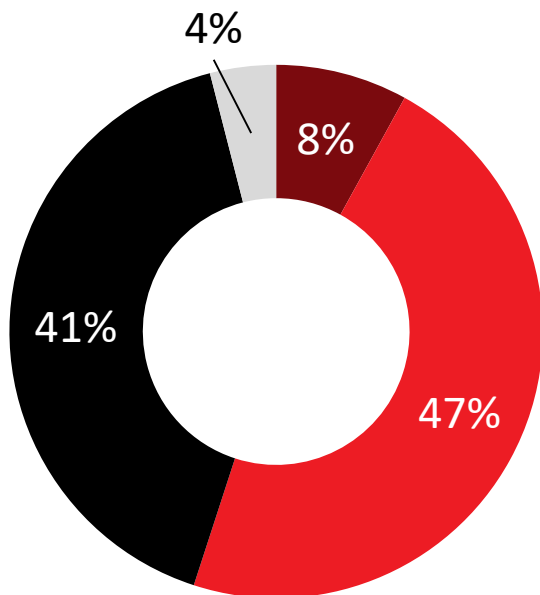
Over half of businesses expect to see some revenue growth in 2019 (8% high and 47% slow but stable). These results are similar to what was seen in 2018.

- ■ Relatively high growth
- ■ Slow but steady growth
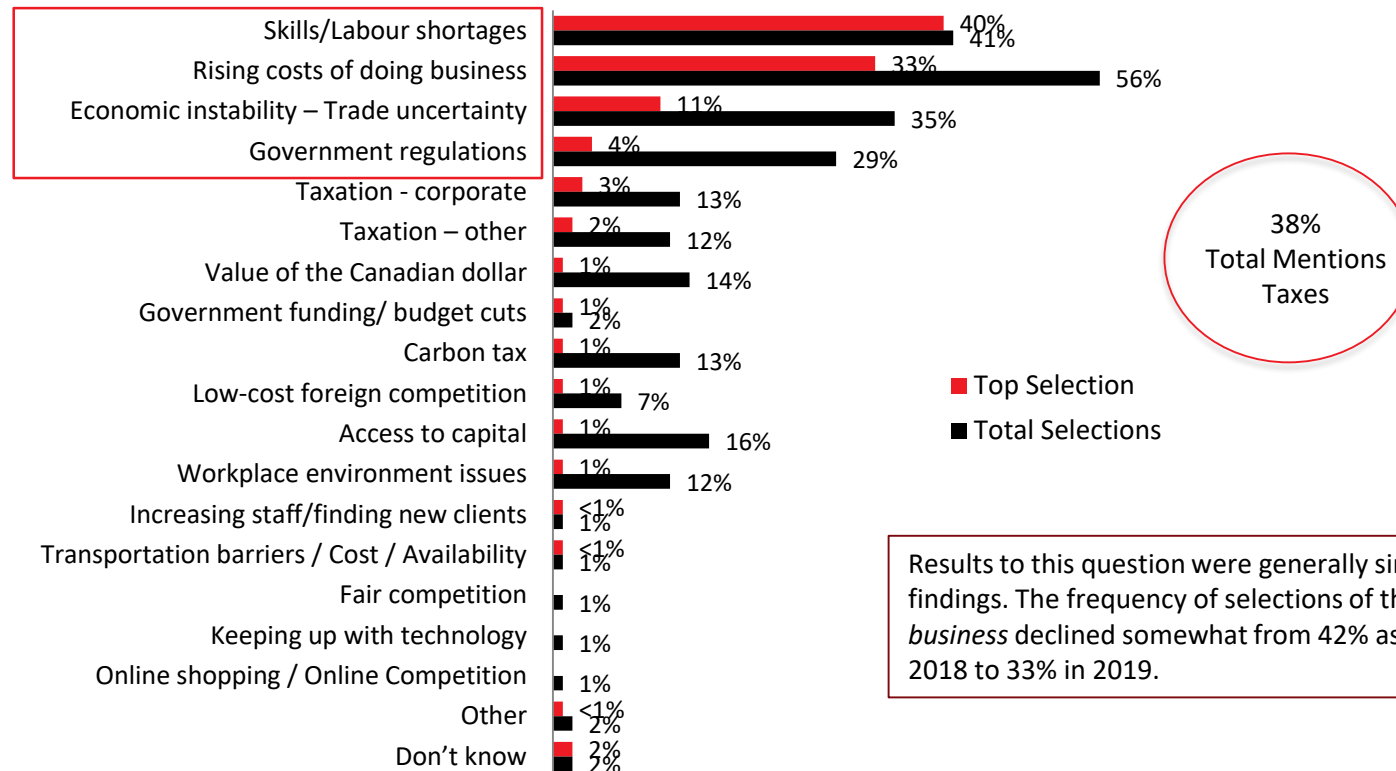- ■ Little or no growth
- ■ Don't know

In 2018 the responses to this question were:
- Relatively high growth – 6%
- Slow but steady growth – 52%
- Little or no growth – 39%

Non-Winnipeg based businesses are more likely to say they will experience little or no growth (49%) compared to Winnipeg-based businesses (32%)

Biggest Barriers to Business Growth in 2020

Q5. What do you anticipate will be the biggest barriers to business growth in 2020? Please select up to three (3) barriers identified below. [TOTAL SELECTIONS] Base: IF Q4= Slow, Little, or Don't Know (n=369)

Barrier	Top Selection	Total Selections
Skills/Labour shortages	40%	41%
Rising costs of doing business	33%	56%
Economic instability – Trade uncertainty	11%	35%
Government regulations	4%	29%
Taxation - corporate	3%	13%
Taxation – other	2%	12%
Value of the Canadian dollar	1%	14%
Government funding/ budget cuts	1%	2%
Carbon tax	1%	13%
Low-cost foreign competition	1%	7%
Access to capital	1%	16%
Workplace environment issues	1%	12%
Increasing staff/finding new clients	<1%	1%
Transportation barriers / Cost / Availability	<1%	1%
Fair competition		1%
Keeping up with technology		1%
Online shopping / Online Competition		1%
Other	<1%	2%
Don't know	2%	2%

38%
Total Mentions
Taxes

Results to this question were generally similar to the 2018 findings. The frequency of selections of the *Rising cost of doing business* declined somewhat from 42% as a top mention in 2018 to 33% in 2019.
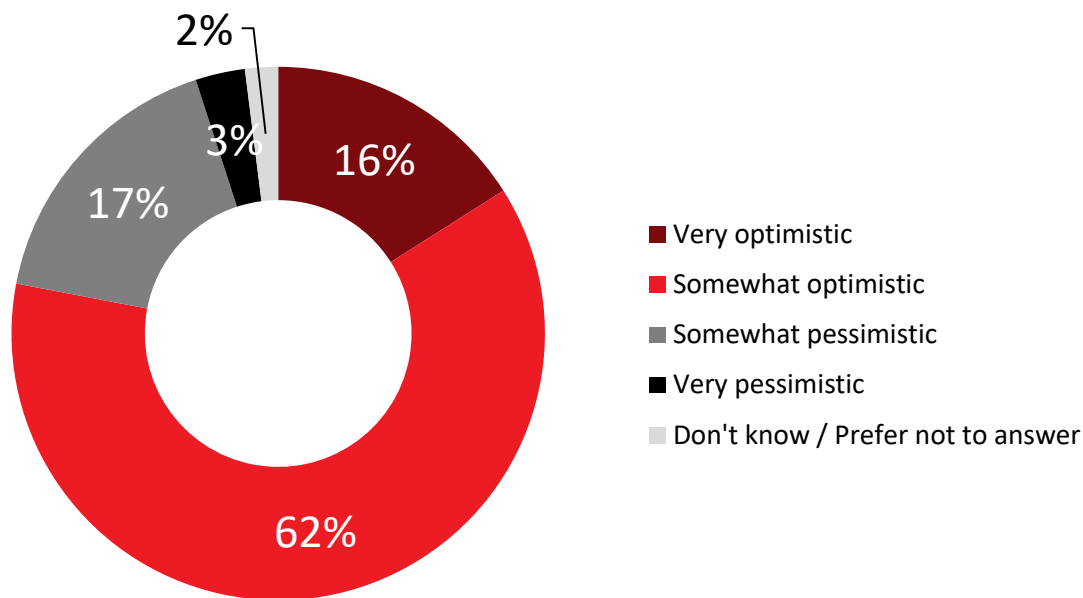
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Top 3 Challenges Beyond Businesses' Control

Q6. Business leaders must continually assess, mitigate, and leverage strengths, weaknesses, opportunities, and challenges, some of which are factors beyond their control. From the list provided on the left-hand table select the top three factors which have the greatest impact on your business? [TOTAL SELECTIONS] Base: All respondents (n=400)

Challenge	Top Selection	Total Selections
Skilled worker shortage	20%	40%
Government regulations	13%	37%
Competition	10%	30%
Weak Canadian economy	8%	27%
Reduced demand for goods and services	7%	22%
Cost of goods and services/inputs	6%	28%
Labour costs, i.e. minimum wage increases	6%	20%
Tax burden	6%	18%
Pace of technological change	6%	21%
Access to credit	4%	9%
High dollar vs. the U.S.	4%	10%
Fuel prices	3%	12%
U.S.-Can trade uncertainty	3%	11%
Interest rate increase	3%	8%
Government spending/funding/budget cuts	<1%	3%
Transportation issues / lacking in rural areas		<1%
Climate / Weather		<1%
Lack of government interest in technology		<1%
Other	<1%	1%
Don't know	<1%	<1%

Results to this question were generally similar to the 2018 findings. In 2019, there was an increase of selections of *Skilled worker shortages* and *Government regulations*. Interestingly, selections of *Tax burden* declined in 2019 (from 27% to 18%).

Agree/Disagree: Self-Assessment of Business Performance

Q8. Taking a broad range of factors into account, how do you feel generally about your business and how it will perform over the next one to two years? Base: All respondents (n=400)


- ■ Very optimistic
- ■ Somewhat optimistic
- ■ Somewhat pessimistic
- ■ Very pessimistic
- ■ Don't know / Prefer not to answer

Total OPTIMISTIC, 78%

Total PESSIMISTIC, 20%

Main Region Driving the Provincial Economy

Q10: When it comes to the overall Manitoba economy, do you feel Winnipeg-based business activity is the more important driver, or do you feel non Winnipeg-based business activity is more critical to the overall health of the province's economy?

Base: All respondents (n=400)

Non Winnipeg-based activity — 19%

Winnipeg-based business activity — 18%

They are equally important — 59%

Don't know — 4%
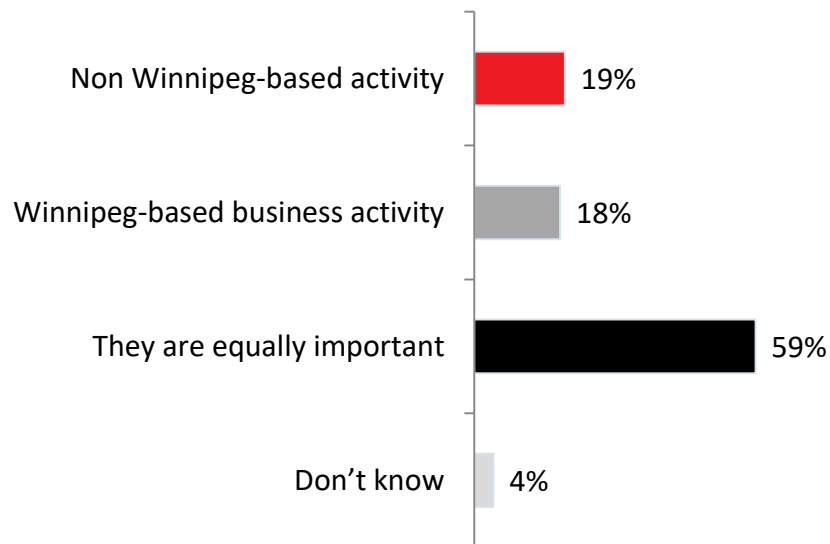
Provincial Government Policies

Agree/Disagree: Manitoba's Business Climate is Competitive

Q7: Please indicate if you agree or disagree with the following statement: *Manitoba's business climate is competitive with other provinces.* Base: All respondents (n=400)
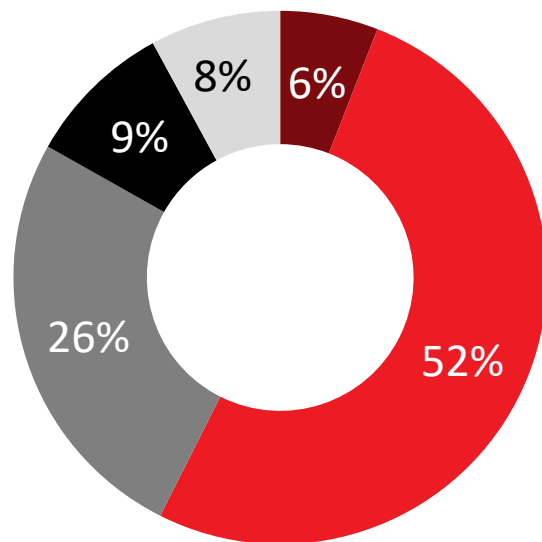
- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Don't know / Prefer not to answer
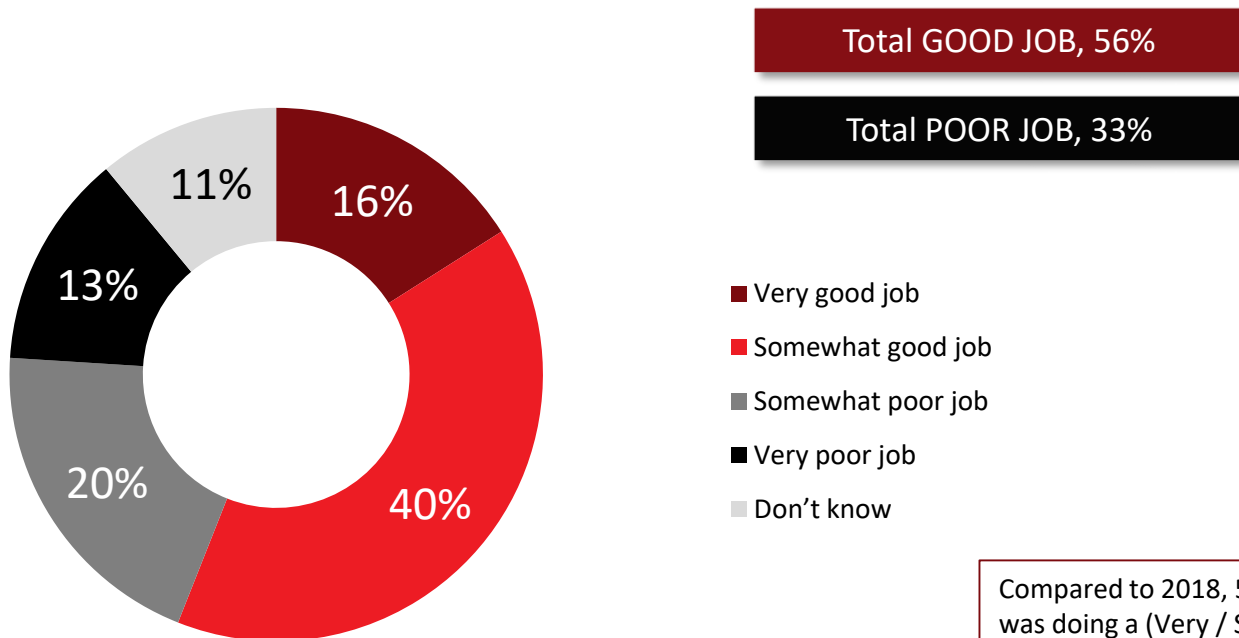
Total AGREE, 58%

Total DISAGREE, 35%

In 2018, the response to this question was:
- 54% Total Agree
- 36% Total Disagree

Winnipeg-based businesses are more likely to agree Manitoba's business climate is competitive (63% agree) compared to non-Winnipeg based companies (53%).
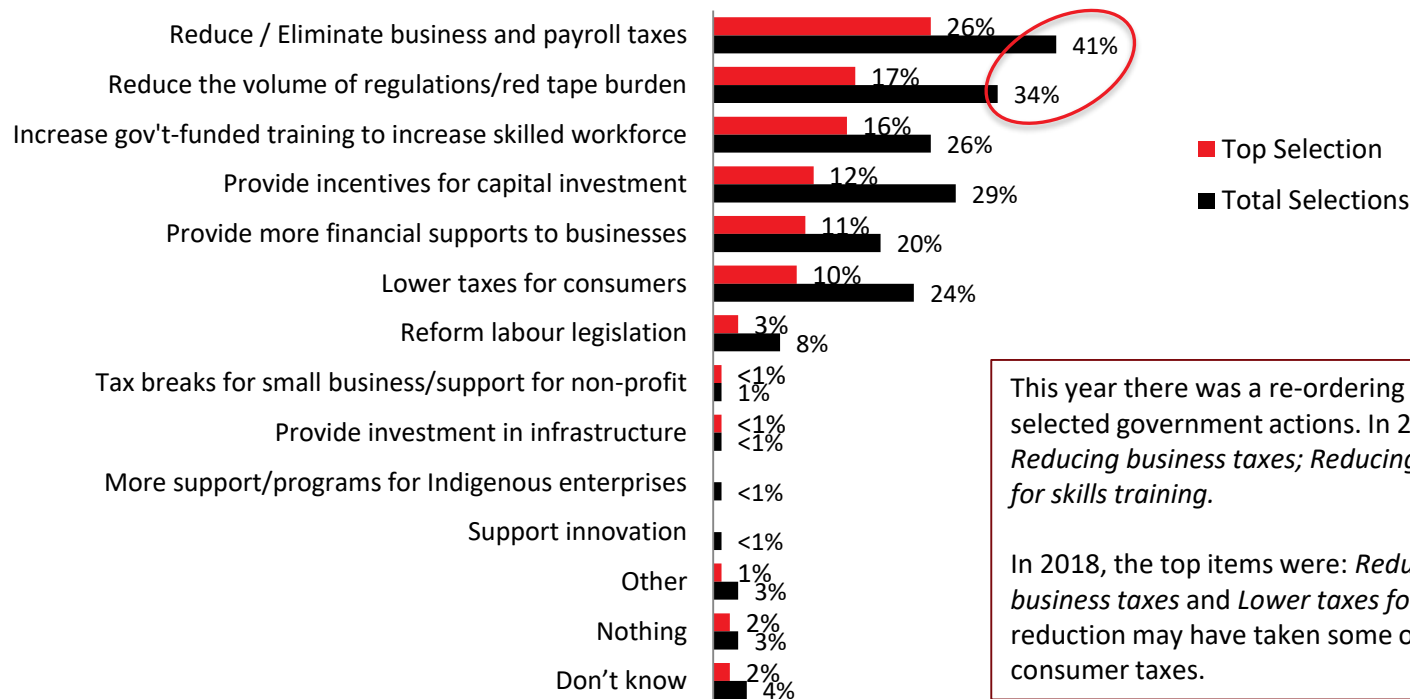
Pallister's Performance Representing Manitoba

Q15. Please indicate how you feel Premier Brian Pallister has performed representing Manitoba in the more than three years he has been Premier? Base: All respondents (n=400)

Total GOOD JOB, 56%

Total POOR JOB, 33%

- ■ Very good job
- ■ Somewhat good job
- ■ Somewhat poor job
- ■ Very poor job
- ■ Don't know

16%

40%

20%

13%

11%

Compared to 2018, 52% of respondents said that Pallister was doing a (Very / Somewhat) *Good Job* representing the province. This represents an increase of 4 points.

Actions to Improve Manitoba Business Climate

Q9. If you had the opportunity, what would you tell the provincial government it should do to improve Manitoba's business climate? Select and drag over the top two (2) items you feel the provincial government should do to improve the business climate in Manitoba. Base: All respondents (n=400)

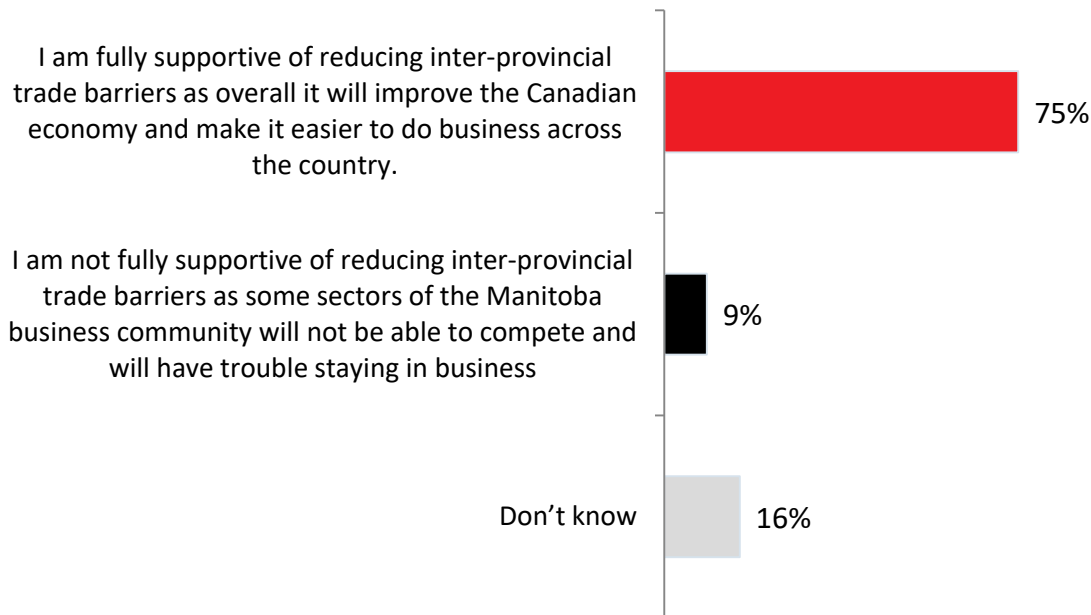| Action	Top Selection	Total Selections
Reduce / Eliminate business and payroll taxes	26%	41%
Reduce the volume of regulations/red tape burden	17%	34%
Increase gov't-funded training to increase skilled workforce	16%	26%
Provide incentives for capital investment	12%	29%
Provide more financial supports to businesses	11%	20%
Lower taxes for consumers	10%	24%
Reform labour legislation	3%	8%
Tax breaks for small business/support for non-profit	<1%	1%
Provide investment in infrastructure	<1%	<1%
More support/programs for Indigenous enterprises		<1%
Support innovation		<1%
Other	1%	3%
Nothing	2%	3%
Don't know	2%	4%

This year there was a re-ordering of the most frequently selected government actions. In 2019 the top items are: *Reducing business taxes; Reducing red tape* and *More funding for skills training.*

In 2018, the top items were: *Reducing red tape; Reducing business taxes* and *Lower taxes for consumers*. The PST reduction may have taken some of the pressure to lowering consumer taxes.

Reducing Inter-Provincial Trade Barriers

Q12. Below are two points of view regarding the reduction of inter-provincial trade barriers. Select the statement that is closer to your point of view. Base: All respondents (n=400)

I am fully supportive of reducing inter-provincial trade barriers as overall it will improve the Canadian economy and make it easier to do business across the country.	75%
I am not fully supportive of reducing inter-provincial trade barriers as some sectors of the Manitoba business community will not be able to compete and will have trouble staying in business	9%
Don't know	16%

Access to Investment Capital in Manitoba

Q13. Please indicate how you feel about the access to capital in Manitoba. Base: All respondents (n=400)

Total ACCESS IS A PROBLEM, 45%

Total ACCESS IS NOT A PROBLEM, 25%

- 11%
- 34%
- 19%
- 6%
- 30%
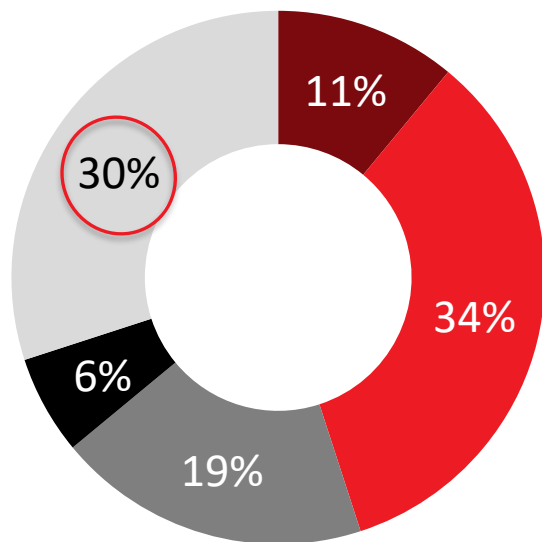
- ■ It is a very serious problem
- ■ It is a serious problem
- ■ It is not a very serious problem
- ■ It is not a serious problem at all
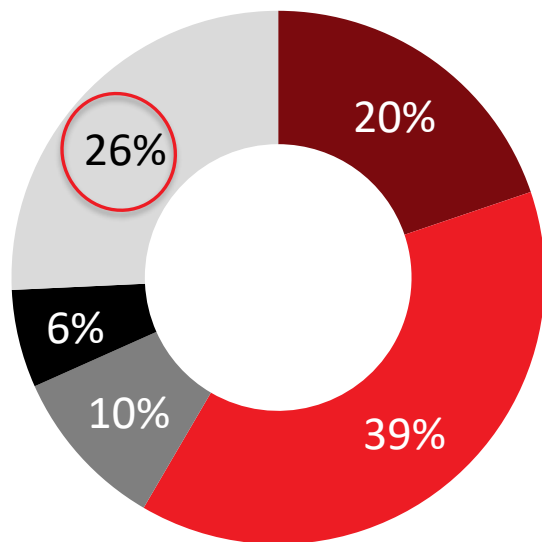- ▫ Don't know / Prefer not to answer

Support/Oppose: Establishing a Venture Capital Fund

Q14. Do you support or oppose the development of a fund for venture capital made up of financial contributions from government as well as the private sector, and administered by an independent board?
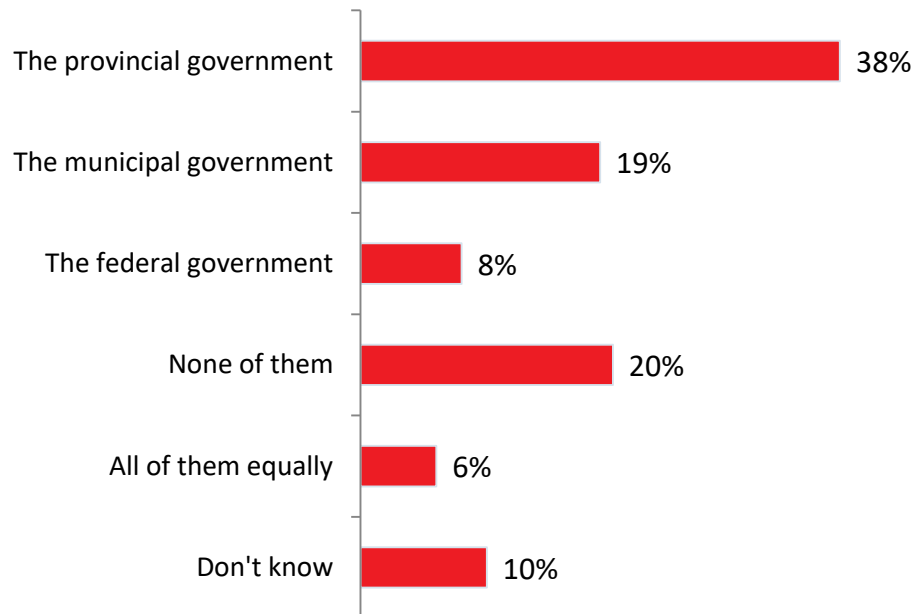
Base: All respondents (n=400)

| Total SUPPORT FUND, 59% |
| Total OPPOSE FUND, 16% |

- Strongly support
- Somewhat support
- Somewhat oppose
- Strongly oppose
- Don't know / Prefer not to answer
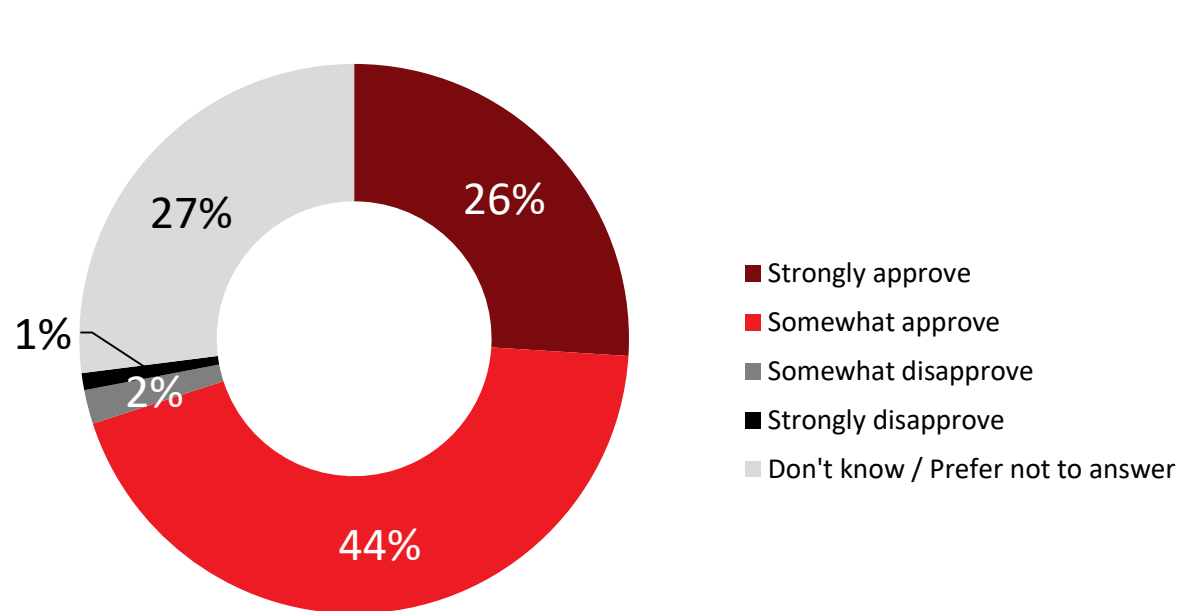
20%
26%
39%
10%
6%

Business Relations & Different Levels of Government

Q16. In Manitoba, which level of government is most in tune with business needs and makes an effort to work well with businesses? [SELECT ONE]. Base: All respondents (n=400)

Level of government	Percentage
The provincial government	38%
The municipal government	19%
The federal government	8%
None of them	20%
All of them equally	6%
Don't know	10%

Impression of Seven Pillars Plan

Q11. Please indicate whether you approve or disapprove of the Chambers continuing to advocate for the 7 Pillars plan with the re-elected government? Base: All respondents (n=400)


Total APPROVE, 70%

Total DISAPPROVE, 3%

- ■ Strongly approve
- ■ Somewhat approve
- ■ Somewhat disapprove
- ■ Strongly disapprove
- ■ Don't know / Prefer not to answer

26%

44%

27%

1%

2%

External Trade Growth

Diversifying Trade with Countries Other than the US

Q17. 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 <u>global</u> trade deals?

Base: All respondents (n=400)
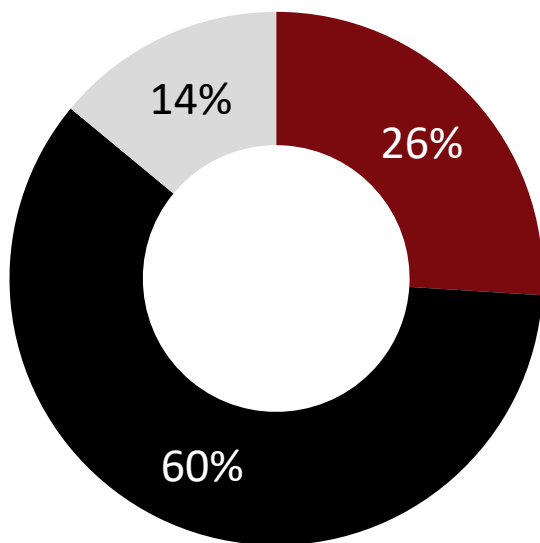
- Yes
- No interest in expanding to international markets
- Don't know

In 2018 the response to this question was:
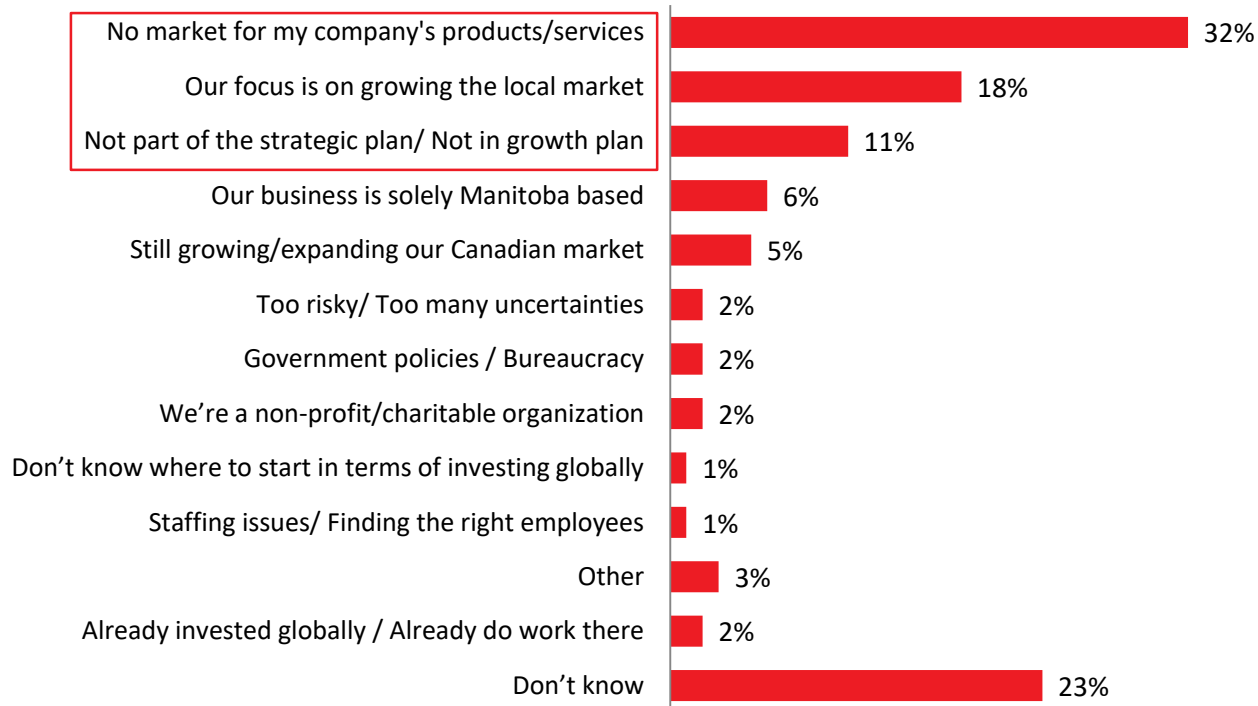- 28% Yes
- 43% No
- 29% Don't know

Medium sized businesses, with 11 to 25 employees, are most likely to say they will look to expand to international markets outside the US (35%).

Winnipeg-based businesses are more likely to say they look to expand outside the US (35%) compared to non-Winnipeg based businesses (18%)

Why Not Expanding to Markets Beyond US

Q18. Why do you say that?

Base: IF Q17=No/Don't Know (n=294)

| Reason	%
No market for my company's products/services	32%
Our focus is on growing the local market	18%
Not part of the strategic plan/ Not in growth plan	11%
Our business is solely Manitoba based	6%
Still growing/expanding our Canadian market	5%
Too risky/ Too many uncertainties	2%
Government policies / Bureaucracy	2%
We're a non-profit/charitable organization	2%
Don't know where to start in terms of investing globally	1%
Staffing issues/ Finding the right employees	1%
Other	3%
Already invested globally / Already do work there	2%
Don't know	23%

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Climate Change

Level of Concern About Climate Change

Q19. How concerned are you about your business being adversely affected by change climate, whether because of disruptions associated with natural disasters or just gradual changes that require operational changes.

Base: All respondents (n=400)
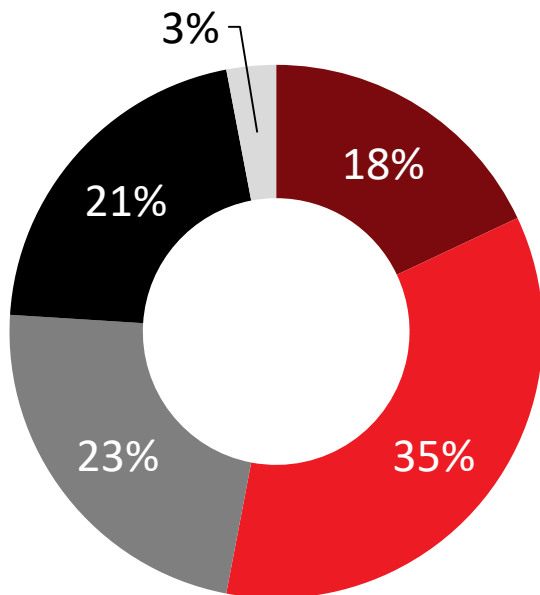
- ■ Very concerned
- ■ Somewhat concerned
- ■ Not very concerned
- ■ Not at all concerned
- ■ Don't know

Total CONCERNED, 53%

Total NOT CONCERNED, 44%

Winnipeg-based businesses are more concerned about the impact of climate change (59% total concerned) compared to non-Winnipeg based companies (47%).

Climate Change & Business Strategic Plans

Q20. Have you factored the effects of climate change into your business operations' long-term strategic plans?

Base: All respondents (n=400)

- Yes
- No
- Don't know

26%

64%

10%
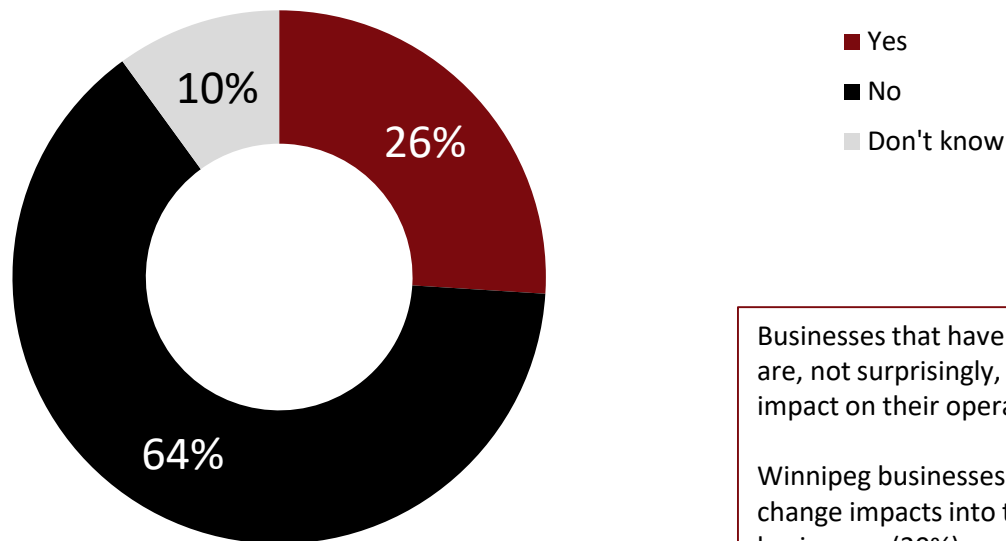
Businesses that have factored in climate change into their strategic plans are, not surprisingly, more likely to be concerned about climate change's impact on their operations (77% concerned).

Winnipeg businesses are more likely to have incorporated climate change impacts into their plans (33%) compared to non-Winnipeg businesses (20%).

Employment Equity

Diversity Policies in Organization

**Q21. Does your business proactively seek out diverse candidates when recruiting for your workforce and/or for board positions, I.E., women, individuals from the LGBTQ community, ethnically and culturally diverse individuals, youth/older adults, Indigenous peoples, newcomers to Canada, etc.?** Base: All respondents (n=400)

- Yes, always – Diversity policy in place
- Yes, sometimes
- No
- Don't know
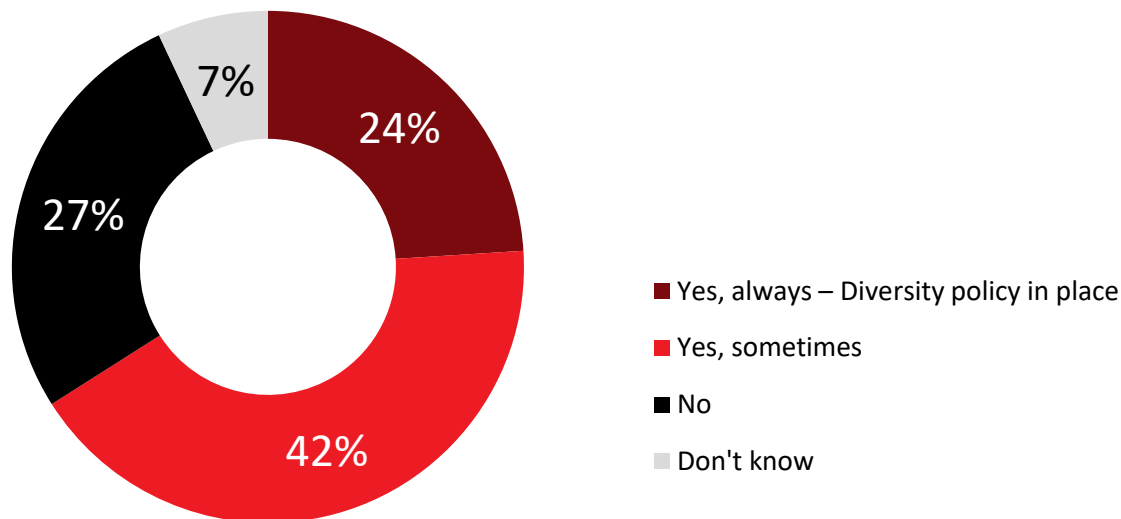
Labour Market

Access to Skilled Labour in Manitoba

Q22. In the 2018 MCC Business Outlook survey, respondents overwhelmingly identified concerns about labour shortages and access to skilled workers to fill positions. From your business' perspective, has the situation related to access to skilled labour in Manitoba improved, worsened, or stayed the same compared to 2018? Base: All respondents (n=400)

Improved — 4%
Remained the same — 59%
Worsened — 25%
Don't know — 12%
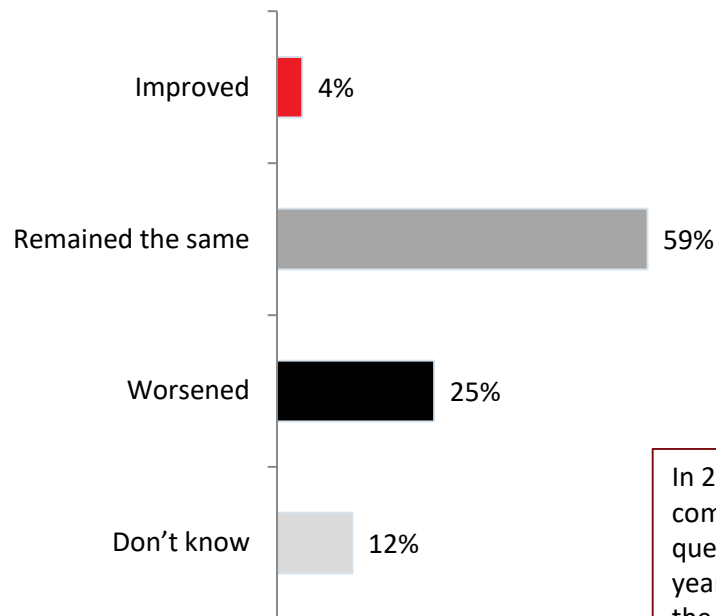
In 2018, this question was phrased to consider things currently compared to the situation 2 to 3 years previous. This year the question was asking the respondent to compare to the situation last year. Not surprisingly, views this year are similar to last year, with the majority (59%) saying things in this area have not changed.

Barriers to Hiring Qualified Employees for your Business

Q23. What do you see as the biggest barriers to hiring qualified employees for your business? Select the top two barriers affecting you from the list below. [TOTAL SELECTIONS] Base: All respondents (n=400)

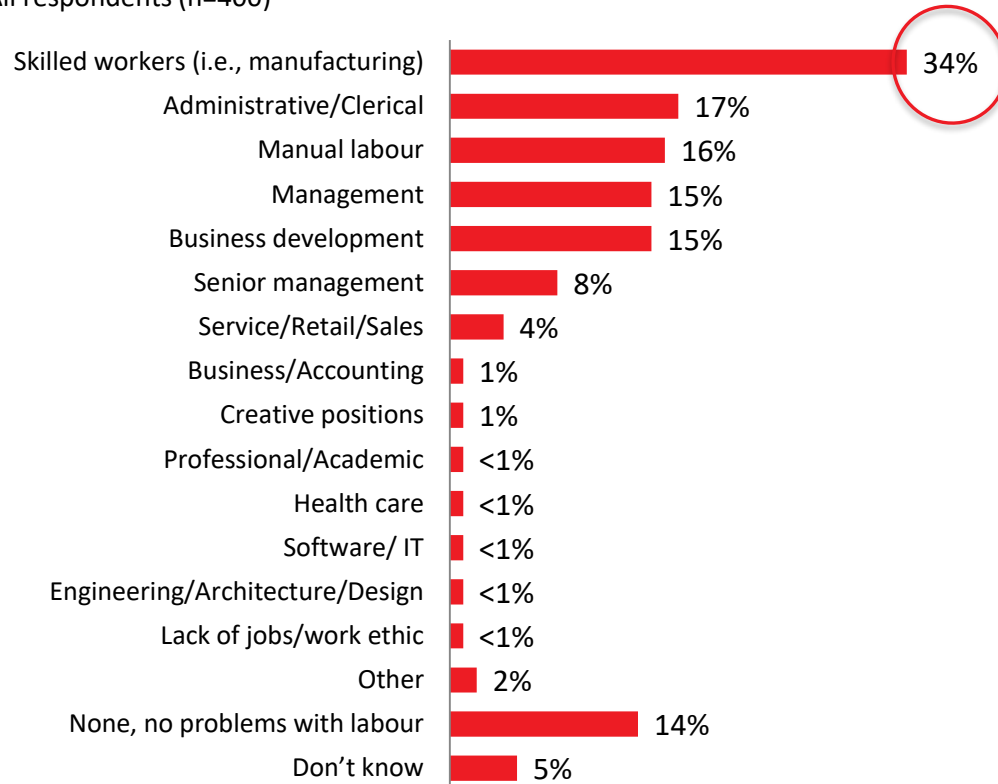| Barrier	%
Inability to attract qualified candidates	27%
Wages don't meet expectations	26%
Lack of funds to hire qualified staff	22%
Alignment of current employee skills with needs	18%
Amount of steady work to offer	18%
Time and cost of training	15%
Not suited to the specific requirement of work	14%
Turnover related to hiring the wrong person	10%
Lack of proper training	8%
Education	8%
Lack of proper certification	8%
No challenges in terms of access to labour	10%
Don't know	2%

Results to this question were generally similar to the 2018 findings, however, selections of the category *Inability to attract qualified candidates* increased by 6 points this year.

Positions Hardest to fill in Organization

Q24. What positions does your organization find the most difficult to fill? [TOTAL SELECTIONS]

Base: All respondents (n=400)

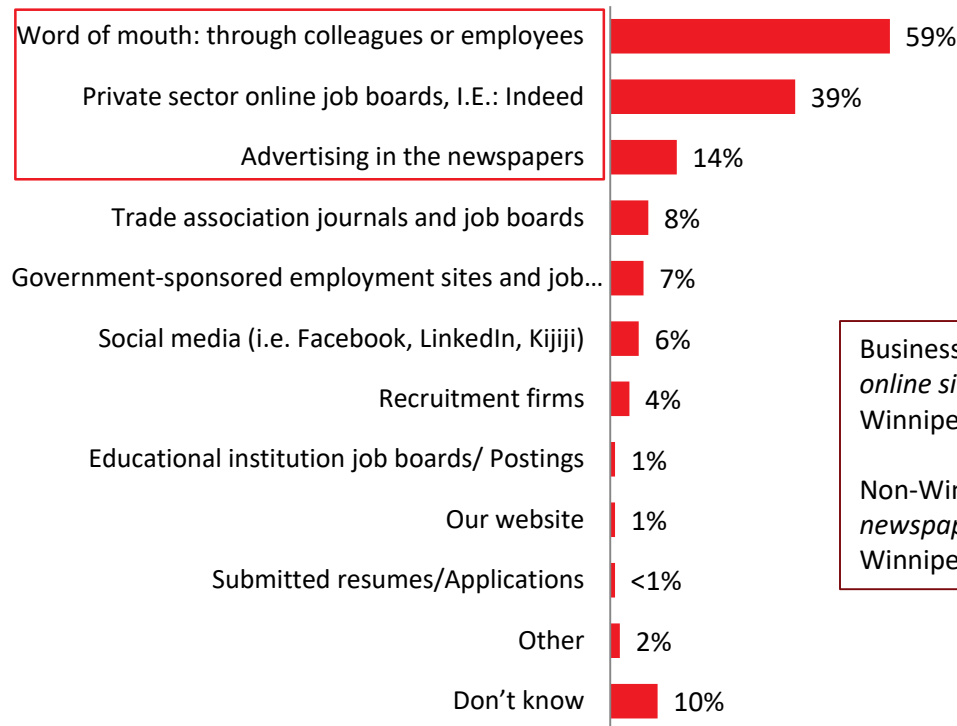| Position	Percentage
Skilled workers (i.e., manufacturing)	34%
Administrative/Clerical	17%
Manual labour	16%
Management	15%
Business development	15%
Senior management	8%
Service/Retail/Sales	4%
Business/Accounting	1%
Creative positions	1%
Professional/Academic	<1%
Health care	<1%
Software/ IT	<1%
Engineering/Architecture/Design	<1%
Lack of jobs/work ethic	<1%
Other	2%
None, no problems with labour	14%
Don't know	5%

Best Method of Finding New Employees

Q25. When it comes to hiring new employees, where does your organization have the greatest success finding suitable candidates?
[TOTAL SELECTIONS] Base: All respondents (n=400)

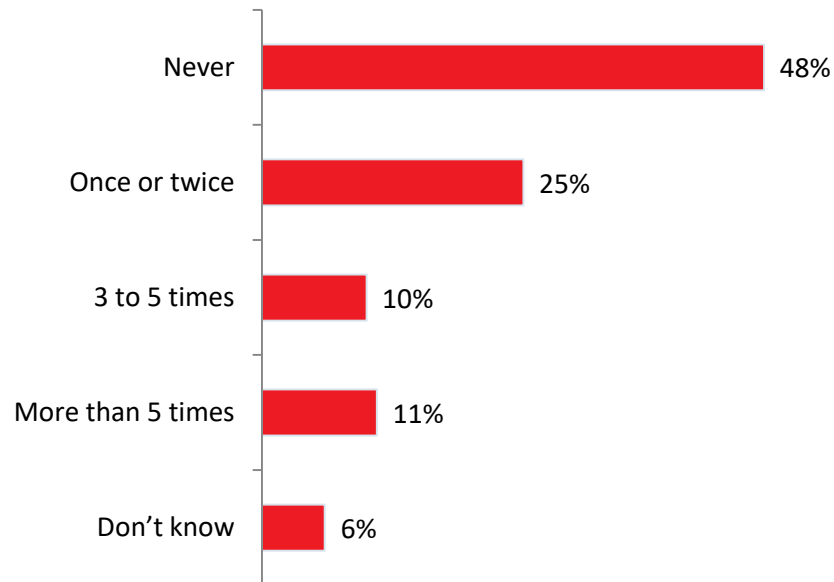| Method	%
Word of mouth: through colleagues or employees	59%
Private sector online job boards, I.E.: Indeed	39%
Advertising in the newspapers	14%
Trade association journals and job boards	8%
Government-sponsored employment sites and job…	7%
Social media (i.e. Facebook, LinkedIn, Kijiji)	6%
Recruitment firms	4%
Educational institution job boards/ Postings	1%
Our website	1%
Submitted resumes/Applications	<1%
Other	2%
Don't know	10%

Businesses located in Winnipeg are more likely to use *Private sector online sites* (49%) and *Trade associations* (12%) compared to non-Winnipeg based businesses.

Non-Winnipeg based businesses are more likely to rely on *Advertising in newspapers* (22%) and *Word of mouth sources* (63%) compared to Winnipeg businesses.

Frequency of Searching for New Employees Beyond Manitoba

Q26. In the past two years, how often have you expanded your search for new employees beyond Manitoba?
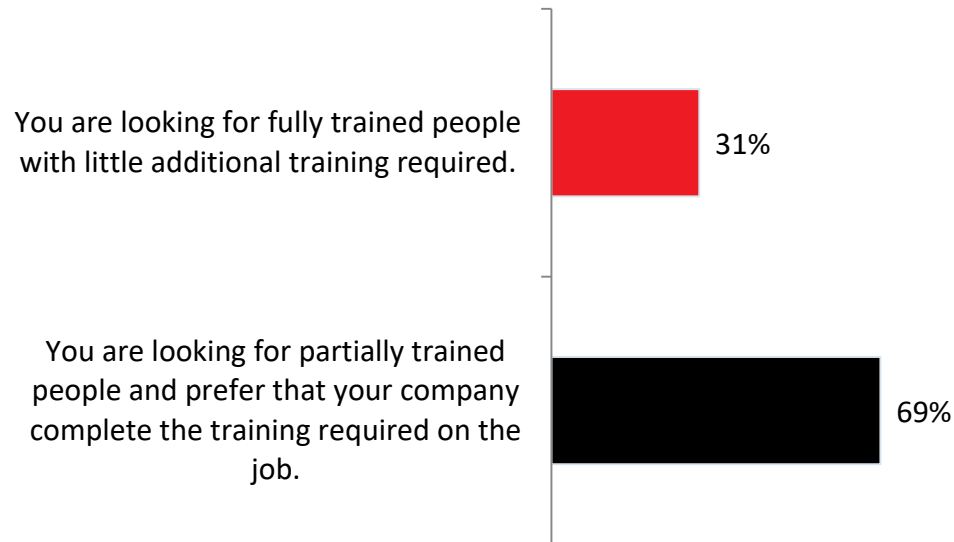Base: All respondents (n=400)

Category	Percentage
Never	48%
Once or twice	25%
3 to 5 times	10%
More than 5 times	11%
Don't know	6%

Types of Employees

Q27: When you hire new employees, which of the following statements most often applies in your business situation?
Base: All respondents (n=400)

You are looking for fully trained people with little additional training required.	31%
You are looking for partially trained people and prefer that your company complete the training required on the job.	69%

Desired Employee Soft Skills – *More Frequent Selections*

Q28. Employers often speak of looking at the "hard and soft skills" of potential new employees. Hard skills are specific qualifications/skills required to perform the job. Soft skills are the more intangible traits that may contribute to a new hire becoming a long-term successful employee. What are some of the soft skills you look for when hiring for your business Base: All respondents (n=400)

Skill	Percentage
Interpersonal skills	25%
Good communication skills	14%
Team player / Collaborative	14%
Ability to work independently/ Self-starter/ Proactive	12%
Work ethic/ Extra effort/ Hard worker	12%
Willing to learn new things/skills	8%
Critical thinking/ Analytical/ Problem solver	8%
Flexibility/ Adaptable	7%
Leadership skills	7%
Good attitude/ Enthusiastic	7%
Integrity/ Honesty	7%
Punctual/ Prompt/ Reliable	6%
English skills (written, verbal)	6%
Other	2%
Only mentioned hard skills (i.e. technical skills)	1%
None, Do not look for those traits	27%
Don't Know/Refused	2%

# Desired Employee Soft Skills – *Lesser Selections*

Q28. Employers often speak of looking at the "hard and soft skills" of potential new employees. Hard skills are specific qualifications/skills required to perform the job. Soft skills are the more intangible traits that may contribute to a new hire becoming a long-term successful employee. What are some of the soft skills you look for when hiring for your business? Base: All respondents (n=400)

Soft Skill	%
Loyal/ Dedicated	5%
Responsible/ Respectful/ Professional	5%
Good time management	4%
Common values/ Values aligned with business culture	4%
Empathy/ Patience	4%
Creativity/ new ideas	3%
Maturity / Emotional intelligence	2%
Cultural awareness/Community connection	2%
Ability to handle stress	2%
Listening skills/ Follows direction	2%
Attention to detail/ Detail oriented	2%
Receptive to feedback/ Ability to handle criticism	1%
Coaching skills/ Mentoring	1%
Common sense	1%
Fast learner	1%

Preparedness for Future Manitoba's Labour Market

Q29. How prepared are you to face changes in the Manitoba labour market in the next 3 to 5 years?

Base: All respondents (n=400)

- ■ Very well prepared
- ■ Well prepared
- ■ Not very well prepared
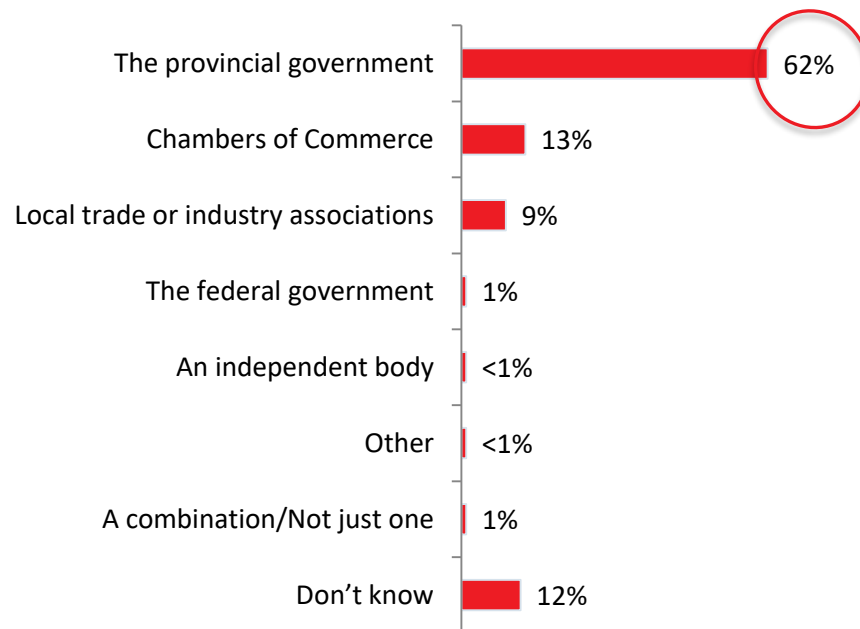- ■ Not at all prepared
- ■ Don't know
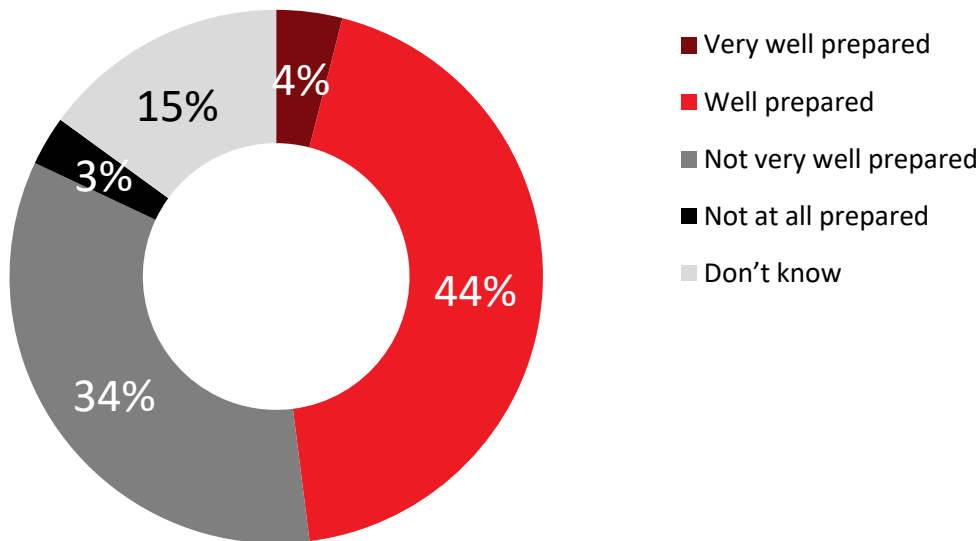
Total PREPARED, 48%

Total NOT PREPARED, 37%

Winnipeg business say they are more prepared for the future Manitoba labour market (56%) compared to non-Winnipeg based businesses (41%).

Larger businesses—26 plus employees—are more prepared (65%) compared to smaller operations (42%).

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Who Should be Providing Info on Labour Market Situation

Q30. Who do you feel should be primarily responsible with providing up-to-date and regular information to Manitoba employers regarding the province's labour market situation? Base: All respondents (n=400)

Response	Percentage
The provincial government	62%
Chambers of Commerce	13%
Local trade or industry associations	9%
The federal government	1%
An independent body	<1%
Other	<1%
A combination/Not just one	1%
Don't know	12%

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