SURREY BOARD OF TRADE
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SURREY LABOUR MARKET PRIORITIES PROJECT

Research Report

September 2019

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For more information please contact:

Surrey Board of Trade
14439-104 Avenue, #101
Surrey, BC, Canada
V3R 1M1

T: 604.581.7130
E: info@businessinsurrey.com
W: https://businessinsurrey.com/

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Sincerely, Doug Tennant - Chair, Surrey Board of Trade

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Executive Summary

Introduction and Background

The Surrey Board of Trade (SBOT), with BC Ministry of Social Development and Poverty Reduction funding and key partners, undertook the development a workforce strategy to address human resource requirements of the Surrey economy and employers over the next 10 years – the Surrey Labour Market Priorities Project. SBOT retained Human Capital Strategies (HCS) to conduct research, engagement, strategy development and implementation planning in conjunction with SBOT, a project steering committee and several key stakeholders.

From March 1 to September 27, 2019, the SBOT with its partners implemented this research and strategy development project for the purposes of determining Surrey's current and anticipated labour market demand, labour supply and labour demand/supply gaps or imbalances for the next 10 years, including the following deliverables.

- Identifying current and future labour market demand, labour supply and labour demand/supply gaps in Surrey over the next ten years;
- Identifying key labour market challenges and barriers to Surrey businesses recruiting, developing and retaining the talent they need to succeed and grow;
- Identifying key industry sectors critical to the growth of the Surrey economy and identify the skills and talent they need to succeed;
- Engaging and identifying the optimal roles of the Surrey business community and other stakeholders for the successful implementation of a Surrey Workforce Strategy; and,
- Creating and planning the implementation of a comprehensive, inclusive Surrey Workforce Strategy that is embraced and contributed to by key business and stakeholder organizations.

This Research Report brings forward the full Secondary Research report (literature review and best practices) as well as all the findings of the Primary Research elements: the Surrey Employer Survey, Key Informant Interviews, and the Employer and Community Stakeholder Focus Groups.

The City of Surrey has a population of 520,000 and a labour force participation rate of 66% and is close to becoming the largest city in British Columbia. Rapid economic and diverse population growth over many years has transformed Surrey into a vibrant metropolis within the Lower Mainland region. Almost 50% of Surrey residents possess a mother tongue other than English or French. Economic growth in Surrey is projected to outpace the provincial economy in the coming decade. Growth, competition for skilled resources and an aging workforce are some of the challenges facing employers throughout the Surrey economy. This project is intended to help build the capacity of Surrey's employers and workforce to continue the development of City's innovative, sustainable and diversified economy.

The SBOT attracts business to Surrey and supports business in Surrey. It provides businesses and organizations with economic opportunity, workplace development and education, international trade, government advocacy and business connections. It believes that transportation and education are the two economic foundations of building Surrey.

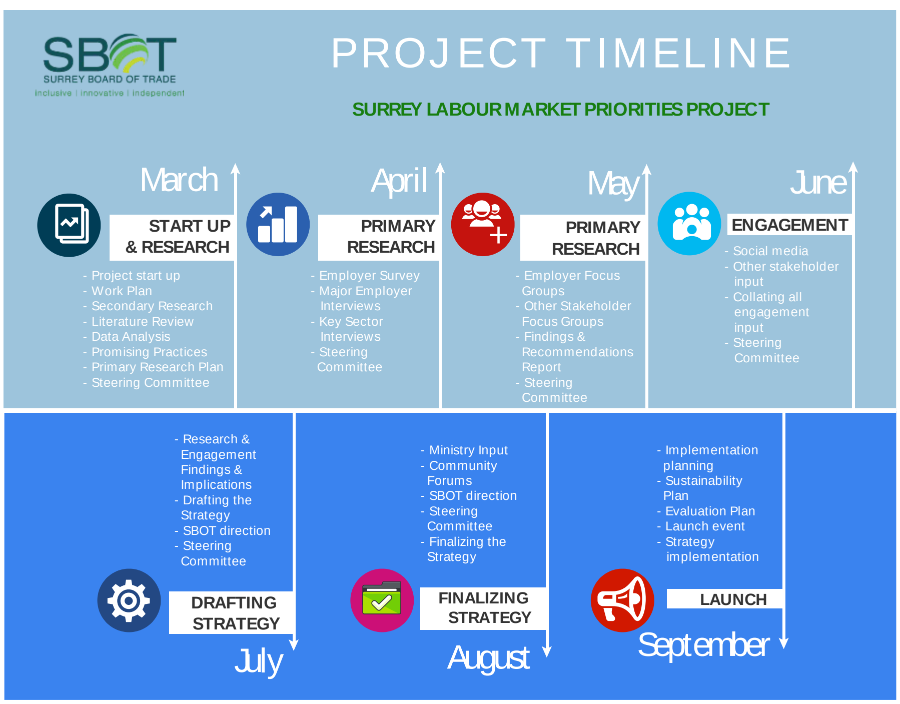
This project will benefit all employers and industries in Surrey as well as the Surrey economy as a whole. It will also benefit workers and underutilized segments of the Surrey labour force in identifying skills, training and supports they will need to sustain meaningful employment and careers.

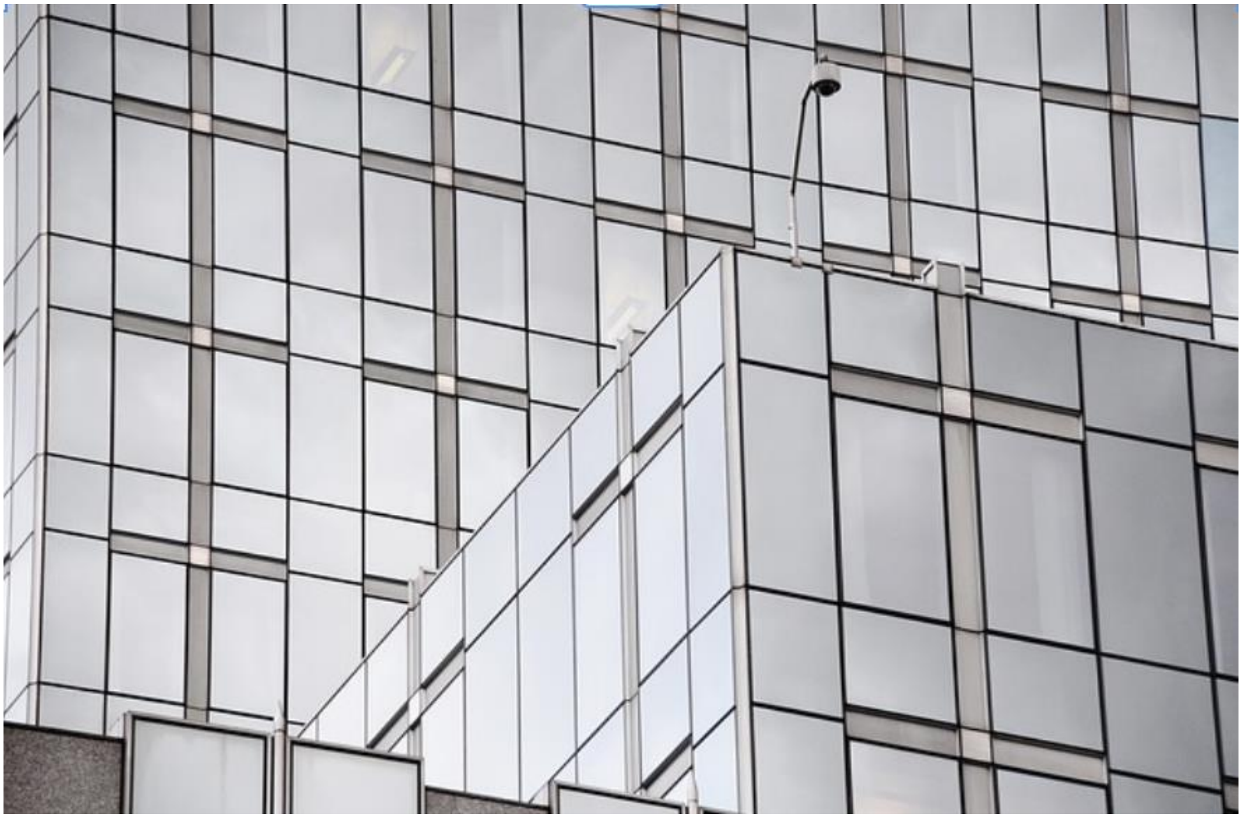
A summary of the key findings of the research and of the vision, goals and strategies and implementation of the Surrey Labour Market Strategy will be made available for the public and stakeholders for reference.

The stated objectives of this project are as follows:

1. To develop and implement a Project Communications Plan to support engagement, promotion and the communication of the Project purpose, goals, activities, engagement opportunities, research findings, Surrey Labour Market Strategy development, partnership opportunities and Strategy implementation;
2. To engage Surrey employers and other stakeholders and conduct secondary and primary qualitative and quantitative researched related to the labour market needs, priorities and solutions in Surrey;
3. To develop a Surrey Labour Market Strategy based on the stakeholder engagement and research findings and Project Steering Committee and input; and,
4. To engage Surrey employers and other stakeholders on the final Strategy and develop a concrete and viable implementation plan, including the substantive participation of Surrey employers and other stakeholders.

The project methodology and timelines are summarized in the graphic below:





Economic, Labour Market and Related Data Analysis

The City of Surrey is the second largest municipality in British Columbia with a 2016 population of 518,000 residents. The city is one of the fastest growing and most diverse communities in Canada, adding close to 10,000 residents annually since 2011. With the largest developable land base in the Lower Mainland/Southwest (MSW) region, Surrey's resident population is projected to reach close to 650,000 by 2026 and 738,000 by 2036 – a growth rate of more than 2% annually over the next 20 years. This is positive news for the city's growth potential and expansion of its labour force to accommodate the inflow of new residents.

This section highlights some key economic, demographic and labour market trends and developments in Surrey and Metro Vancouver in recent years.

Economy

- For the last five years, the provincial economy has experienced robust growth largely driven by real estate and construction activity in BC's Lower Mainland, as well as manufacturing, transportation and service sector growth across much of the province.
- Metro Vancouver has been Canada's fastest growing metropolitan region for several years, and now accounts for close to 60% of the BC economy.
- As part of the Metro region, the Surrey economy continues to grow with activity across most goods and services sectors. In 2018, Surrey accounted for 21% of the regional economy with an economic

contribution estimated at $29 billion (Gross Domestic Product. This represents an increase of close to $5 billion in added value since 2014.

- Growth is expected to moderate in Metro Vancouver and Surrey in 2019 and 2020, as real estate and construction activity level off due to rising interest rates and stricter mortgage requirements.

Business Development

- Surrey has a strong, innovative and sustainable economy, in large part due to the strength of its small business sector.
- Surrey saw the total number of businesses grow from 94,000 to 108,500 between 2014 and 2018, an increase of more than 15%. Over the same period, the total number of businesses in the MSW region increased by nearly 12%. Surrey's share of small businesses (with or without employees) in the MSW region continues to climb, illustrating the dynamic nature of the city's economy.
- Apart from the construction industry, business growth occurred primarily in the service sector. The decline in the number of registered businesses in the goods-producing sector was likely the result of industry consolidation and advanced automation1. These industries have otherwise experienced above-average growth in recent years.

Population

- Surrey has recently been characterized by faster growing and younger population than in the broader MSW region. Over three-quarters of the Surrey population growth during 2011-2016 was from international migration – this appears even more significant when one considers that only 36% of Metro Vancouver's population growth was driven by immigration during this period.
- Over the last 20 years, the Surrey's population has been rapidly growing at an annual rate surpassing both Metro Vancouver and the rest of BC. Since 2014, Surrey added close to 65,000 residents while growing at an annual rate of 2.5%. Surrey is on track to becoming the most populated city in BC in less than 25 years – by 2041 – as an estimated 260,000 people from around the world seek to make a new life in one of Canada's most culturally diverse cities.
- According to the 2016 Census, Metro Vancouver received an average of 28,500 immigrants between 2011 and 2016, of which more than 25% located in Surrey. Today an estimated 43% of Surrey's total population are immigrants.
- Surrey's resident population is also one of the youngest in BC, with a median age in 2016 of 38.7 years and Metro Vancouver's being just under 41 years.
- 51% of Surrey residents speak a language other than English or French – 102 languages are spoken in Surrey

Education

- Overall, Surrey has a population with lower educational attainment then Metro Vancouver. For example, in 2016, 42% of the Surrey working age population possessed no post-K-12 certification

[1] Statistics Canada, Business Register; BC Stats

(i.e. apprenticeship, college or university), compared to 32% of the population in the broader region.

- BC's Post-Secondary Supply Model provides projections of the new supply of skilled labour for all age groups that will exit BC's public post-secondary education system with a credential between 2017/18 and 2026/27. Graduate estimates for Surrey are based on the City's share of the provincial population (11.1%) as of 2016.
- Competition for skilled graduates will continue to intensify over time, while the challenge for Surrey employers will be to attract and recruit graduates for their growing industries.
- The positive news is that from 2011 to 2016, the number of Surrey residents with a college or university credential rose by 17% and 24.5% respectively. Unfortunately, the number of workers with an apprenticeship or trades credential decreased by 13% during this period.

Labour Market

- The Surrey labour market continues to expand in line with a growing population and increasing demand for workers across most industries.
- Unemployment trended downwards from 7.9% to 6.5% between 2011 and 2016

Labour Force

- The Surrey labour force was estimated at just under 274,690 workers in 2016, an increase of more than 12% since 2011.
- As a share of the MSW labour force, Surrey accounted for 17.7% of MSW's labour force of more than 1.5 million workers.
- On a relative basis, the Surrey labour force has a larger share of workers in certain industries, including trades & transport and manufacturing, reflecting a somewhat more industrial nature to the Surrey economy.
- The Surrey labour force grew at an annual rate of 2.5% between 2011 and 2016, far outpacing the annual rate of 1.4% for the broader MSW.
- The Surrey economy experienced above average labour force growth in several service industries over this period, including in: accommodation & food; management of companies, administration, support and waste; health & social assistance. As well, growth was seen in construction in Surrey's goods-producing sector.
- Except for the natural resources, agriculture & related industries, the Surrey labour force experienced positive growth across all major occupational groups between 2011 and 2016. Occupational growth was particularly evident in: sales and services jobs; trades, transport and equipment operators; and health-related occupations.
- Additional labour force issues for Surrey workers are increasing housing costs (owning and renting) in Surrey and Metro Vancouver and transportation challenges, including the need for better public transit and commuting time for workers traveling from and to Surrey.

Employment and Unemployment

- Surrey experienced a strong increase in employment through 2018 and sharply declining levels of unemployment in both goods and services.
- Surrey's goods-producing sector added more than 6,000 jobs during 2014-2018.
- The rate of growth in the region's goods sector (4%) was double the rate of growth for the services sector (2%). This is a positive indicator for Surrey's growing economic base.
- Unemployment in both the goods and services sectors correspondingly trended downwards over the same period. For the goods sector, the unemployment rate for the region fell from 5.9% in 2014 to 2.7% in 2018, and from 3.5% to 2.5% in the services sector over the same period.
- At these rates (i.e. full employment), the potential for labour shortages intensifies and the need to more effectively utilize the skills of underemployed workers and attract workers from outside Surrey and the MSW region will become essential.

Employment Projections, Job Openings and Gaps

- Through 2028, employment demand in Surrey is anticipated to increase 1.2 percent on average each year, which is faster than the BC annual average growth rate of 1.1 percent.
- In 2018, Surrey employed an estimated 288,000 workers and employment demand is projected to increase by a total of 11.8% over the next 10 years. Industries with above average employment demand over this period include professional, scientific & technical; health and social assistance; transportation and warehousing; and accommodation & food.
- More than two-thirds of total openings are anticipated in four of the 10 major occupations, led by sales & service; trades, transport & equipment; business, finance & administration; and management occupations.
- Although gaps do not emerge at the major occupational level over this period, individual occupational gaps already exist and will become more acute each year. BC's high-tech industry, for example, is expected to continue to grow with occupations such as computer system designers projected to be one of the fastest growing jobs through 2028. These and other in-demand occupations will be further explored throughout this study. An imbalance or shortage of almost 7,000 workers could materialize in Surrey by 2028 without preventative strategies.

Literature Review

The literature review for this report is focused on the labour market needs of the Surrey economy, including qualitative labour demand, labour supply and demand/supply gaps, trends, issues, public policy implications, etc. – all information that will be useful to SBOT, employers, labour force participants, government, service providers and other stakeholders in the development of a Surrey Workforce Strategy. It provides a synthesis of a review of findings from 37 reports and publications and more than 90 websites (see References) scanned during the project's secondary research phase. As much as possible, information was gleaned from the literature that was most relevant to Surrey.

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Several labour market and human resource themes that emerged during the course of the review included the importance of the following factors in successful workforce strategies:

- Use of labour market information
- Talent attraction
- Talent recruitment
- Onboarding of employees
- Job-specific education and training
- Cross-cultural engagement
- Employee retention
- Labour force-specific strategies

Key findings found in the literature review are as summarized below.

Skills gaps (current and projected) by industry

- People skills will be in demand i.e. active listening, speaking, reading comprehension, critical thinking, and social perceptiveness
- Certain occupations – notably technical and advanced manufacturing - will benefit from STEM skills
- Sort term training to address skills gaps is suggested as a solution
- Creative use of available funding should be used to support skills gap training initiatives

Key growth industries and potential HR challenges/barriers

- City of Surrey has identified five priority sectors - Health Technology, Clean Technology, Advanced Manufacturing, Agri-Innovation and the Creative Economy
- Advanced manufacturing has received significant focus resulting in several recommendations for labour market strategies to address challenges facing the sector
- Largest industries in Surrey are Wholesale and Retail Trade, Health Care and Social Assistance, and Professional, Scientific and Technical Services.
- Greatest number of projected job openings are in Retail Trade
- Highest employment growth by percentage is 3.4% in computer systems design and related services

Labour sources including youth, underrepresented groups, secondary and post-secondary graduates and migrants (provincial, national, international)

- Close to 600,000 job openings are anticipated for the Mainland/Southwest Region by 2028
- Employment demand will increase by 1.2% annually
- Immigrants represent a significant pool of skilled workers

Education and training gaps

- Literature did not provide significant detailed information regarding skills or training gaps
- Projections indicate that 75% of jobs will require post-secondary training by 2028
- Surrey's workforce post-secondary education level currently stands at 50%

Impacts of technology on workforce productivity and employment

- Approximately 36% of occupations in BC have a high chance of being affected by automation. That represents 166,000 job openings to 2028.
- A significant number of occupations that have a high chance of automation are currently experiencing labour shortages in BC.
- According to the AMIE study, the Surrey advanced manufacturing workforce will need to be skilled in several key technologies for Industry 4.0.

Demographic trends impacting recruitment, development and retention

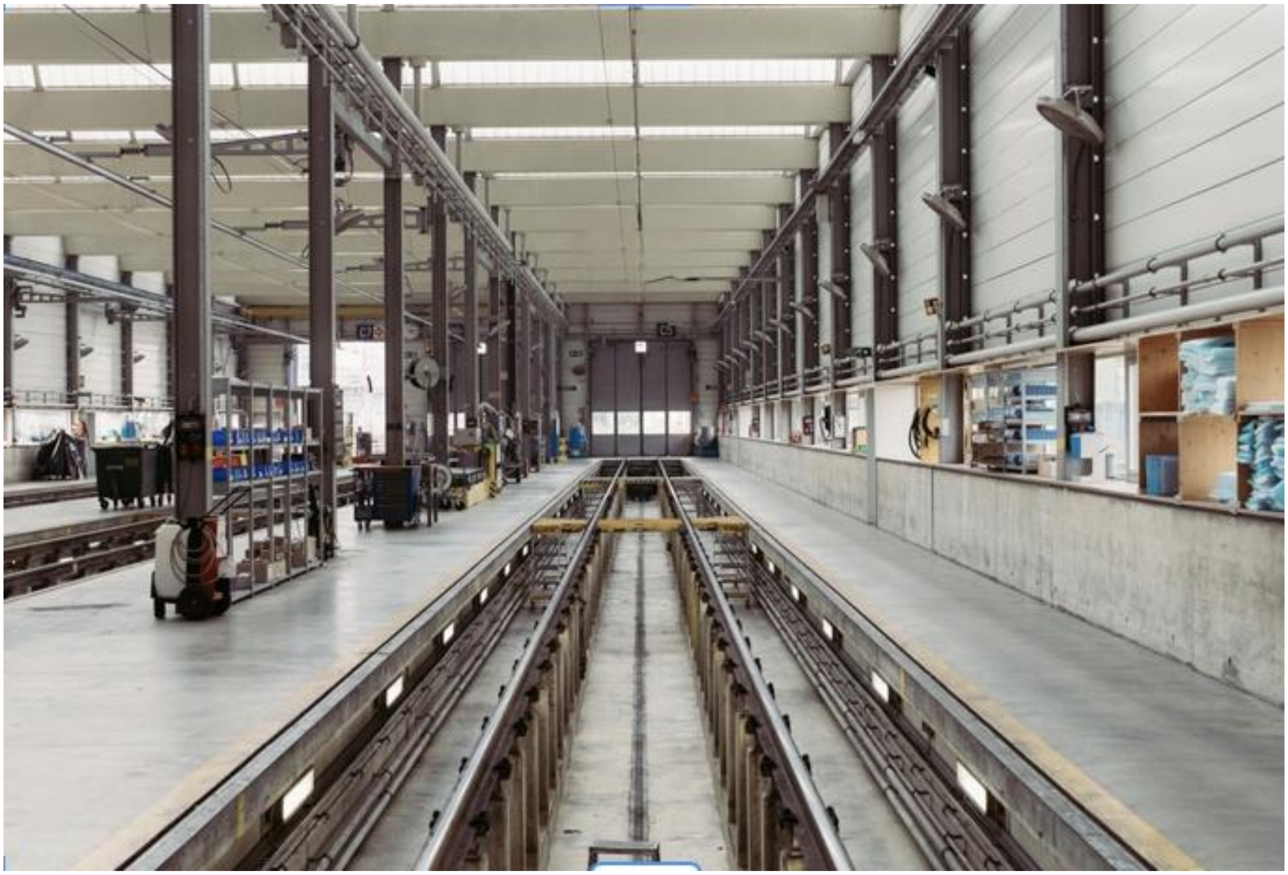
- Population growth is directly linked to employment growth.
- It is expected that the gap between births and deaths will grow, leading to a lower rate of natural population growth.
- Millennials are moving into their 30's.
- GenZ numbers are smaller, meaning that the number of workers in their 20's will continue to decline in the coming decade.
- Immigration alone will not offset the decline.
- Strategic approaches to training and skill development are needed to ensure that the economy is able to expand.
- Surrey and other communities in the Mainland/Southwest Region are not immune to these demographic changes but the area will continue to be a strong driver of employment.

Promising Practices Scan

The study team reviewed a number of reports that claim to reflect or imply best practices. The following ten examples are summarized in the main body of this report:

1. Venture Kamloops – Regional Workforce Strategy
2. Workforce Planning Ontario
3. Quebec National Workforce Strategy 2018-2023
4. Forum of Labour Market Ministers - Toolkit of Promising Practices
5. Alberta's 10 Year Labour Market Strategy
6. The City of Prince George's "Move Up Prince George" Initiative
7. The City of Mississauga's 10-year Economic Development Strategy
8. Spokane Workforce Council's Spokane Resource Center
9. City of Calgary Economic Strategy and Technology Sector initiatives
10. State of Oregon – Future Ready project

It should be noted that while the above examples have varying degrees of applicability to Surrey, it was challenging to find examples that were directly applicable to this project – some involve smaller communities or more rural areas, and different economies and labour market dynamics. Some of the examples are also involve more broad geographic scope (i.e. national, provincial, statewide or broader regions). There are also many examples of sectoral (industry-wide) workforce strategies in BC and elsewhere, but they involve industry sectors across the province or country.



From these examples and the scan of promising practices, a number of 'lessons learned' or principles for a successful workforce strategy were identified, including the following:

- Reliable, timely, local labour market information is critical to developing labour market strategies
- Local working groups or planning boards representing a mix of stakeholders provide valuable guidance and input on local initiatives
- Targeted training initiatives should be accessible and based on local priorities and delivery models should consider a mix of institutional, corporate and individualized training
- Workforce supply issues will intensify and will require multi-faceted approaches including maximizing pools of talent such as skilled immigrants, youth, indigenous workers and underrepresented groups – supply shortages will affect economic growth
- Local initiatives for attraction, recruitment and retention should be considered as elements of the broader labour market strategy

- Local/regional strategies can be informed by provincial, national and international strategies
- Local strategies and initiatives should consider the global economy
- Supports for labour force attachment should include initiatives to stabilize and sustain more than simply employment and extend to housing, transportation, etc.

Primary Research

The HCS study team engaged with almost 200 Surrey employers and stakeholders on workforce challenges and opportunities. Each individual voice contributed greatly to a current understanding of workforce dynamics Surrey.

The following provides a summary of the three primary research activities:

1. A comprehensive employer survey provided the study team with valuable employer insights across a wide variety of sectors.
2. A series of key informant interviews with representatives of major Surrey employers and employers in key Surrey sectors, yielded deeper and more targeted responses focused on attraction, recruitment and retention challenges facing Surrey employers.
3. A series of three focus groups with employers and other stakeholders and a First Nation to probe more deeply on workforce issues and solutions. These sessions concentrated on identification and prioritization of challenges and corresponding potential solutions.

Key findings across the primary research methodologies are highlighted below in the form of challenges, potential solutions and implications. Overall, the three primary research elements for this project were mutually reinforcing – bringing out, to varying degrees, similar challenges and solutions, but with more opportunities to delve or probe into topics during interviews and focus groups. Each primary research methodology, therefore, brought out some unique findings that were not as apparent in the other two elements.

Workforce Challenges and Potential Solutions

The employer and stakeholder input in this project have coalesced around a number of the following themes of workforce challenges and potential solutions.

Attraction

Attracting workers to Surrey involves both intrinsic and extrinsic challenges for employers: 1) internal human resource practices (e.g. attraction, recruitment, training, retention, etc.); and 2) external factors that impact labour demand and supply such as transportation, infrastructure, housing, social services, etc.).

Perceptions and perspectives of employers consulted about the attractiveness of Surrey as a place to live and work are somewhat mixed but mostly positive. Positive attributes such as a relatively large labour pool, proximity to Vancouver and the US border and a growing population are offset by concerns about affordable housing, transportation, public transit, perceptions of a 'Surrey stigma', (e.g. crime), inconsistent community infrastructure, unbalanced availability of - and access to - social services, etc. For the most part, these issues are largely not within the control of individual Surrey employers. Addressing these external challenges demand a larger public policy initiative across all levels of government.

On an intrinsic level, employers do have considerable internal leverage for increasing their own attractiveness. The level of success in labour force attraction experienced by employers in Surrey is influenced by what they are able to 'offer' – competitive wages, favourable working conditions, healthcare and other benefits, a strong culture supported by shared values, beliefs and attitudes, interesting and challenging work, meaningful recognition, opportunities for personal and professional growth, prospects for advancement, etc.

Recruitment

Key recruitment challenges identified by Surrey employers converge around several themes. While it is generally acknowledged that there is a large labour pool from which to draw, there is a prevailing notion that there is a notable shortage of 'qualified' workers, (i.e. workers with appropriate levels of knowledge, skills and experience). Other significant recruitment challenges include competition among employers, geographic location, (e.g., urban, suburban, rural), access to reliable, convenient, affordable public transit and/or parking. In addition, employers cited the challenges associated with tapping all available talent pools, including various age cohorts, immigrants, LGBTQ, Indigenous – both on-reserve and urban, people with disabilities, and other equity-seeking groups.

In terms of recruitment tactics, employers described their experiences with building positive workplace cultures, offering good benefits, providing opportunities for interesting work, offering rewards and incentives, etc. Although strategies and tactics vary by sector and industry, most employers use social media as well as conventional and word of mouth approaches and employee referrals as means to recruit talent.

Education, Training and Professional Development

Employers did not offer many occupational-specific facts and figures or quantification of needs/demand, (e.g. future training spaces needed). Comments regarding education and training needs and gaps centred on trades, technical, technological and professional occupational categories.

Employers offered a mix of perspectives on the extent to which schools, post-secondary institutions, private trainers and employment service providers were providing satisfactory programs and graduates.
Notably – while blended school/work models of learning were popular among employers, traditional apprenticeships were not well supported by employers in this project.

There is a desire among employers for more work-related, (e.g. trades, technologies) and soft skills, (problem solving, communication, etc.) to be covered in high school. Graduates should leave school better equipped, particularly in readiness for the world of work. This includes attitudinal readiness, (i.e. realistic expectations for wages, responsibilities, etc.) especially among members of the 'millennial' workforce.

Retention

Employers cited some similarities between recruitment and retention challenges. In particular, employers noted that variables that reduce or increase recruitment also affect retention – for example organizational culture, working conditions, compensation, etc.

With some variance among sectors, the specific challenges identified by employers include age-related issues, (e.g. retirements), accommodating the unique needs of the millennial cohort, the growing trend toward 'poaching' by competitors, and worker access to amenities, infrastructure and effective transit in Surrey.

External (Non-HR) Drivers

Findings across all components of the primary research identified common key external issues that informed the Surrey labour force strategy. These are largely beyond the control of individual employers or sectors, and include:

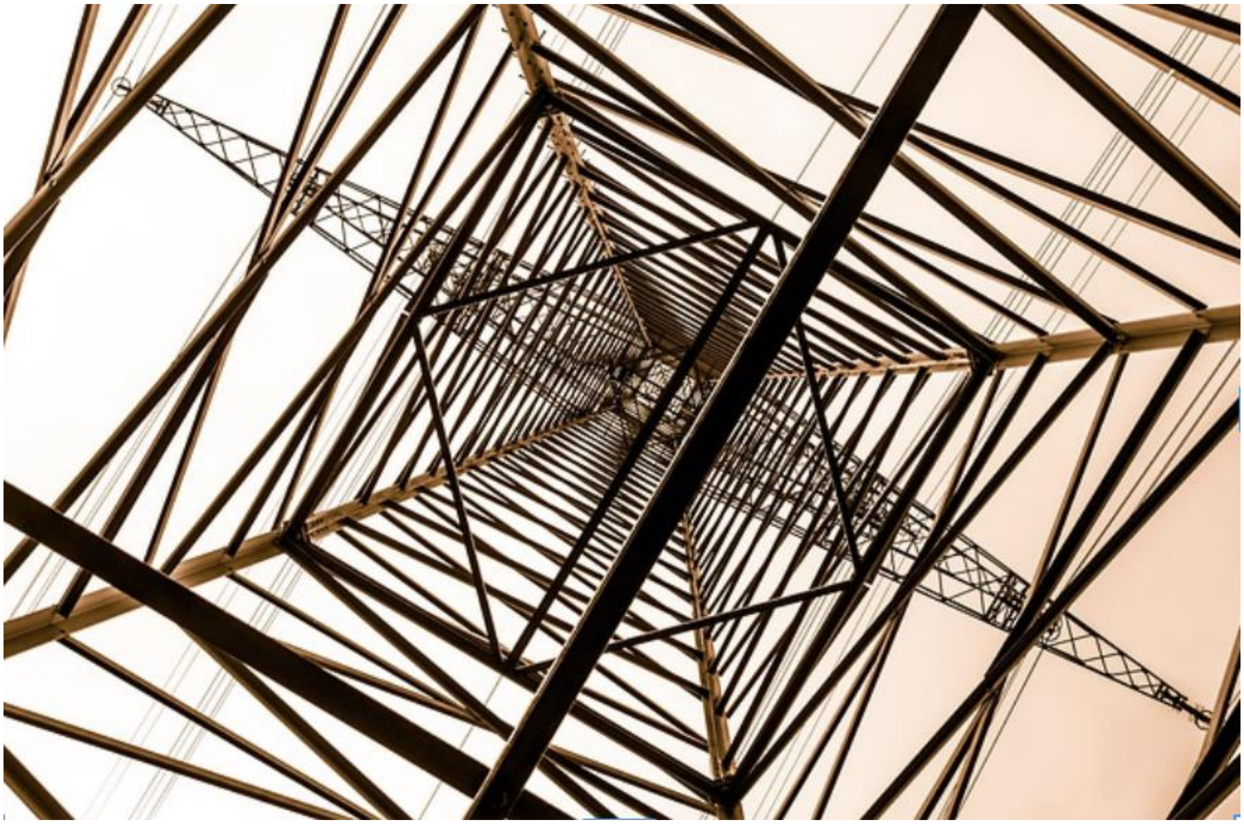
- Affordable housing
- Efficient, cost-effective, accessible transportation
- Critical mass so that services and infrastructure that keep pace with growth
- Community infrastructure
- Effective social services
- Perceptions of the image/stigma of Surrey, including crime and safety

Surrey employers want to work with others in governments and communities to address these bigger issues.

One example they discussed is transportation. While the transit system and transportation options work for some Surrey employers and workers, the degree to which this was a challenge varied by employer – particularly by location. If the company is near a Skytrain station and/or on a major bus route, transportation may not be such a problem; but some employers are struggling with arranging creative solutions (e.g. carpooling, private mini-bus service, modifying shifts times, negotiating extensions off major bus routes, etc.) for workers commuting because of their location. Also, with Surrey's increasing building density in some areas, commercial/institutional building parking volume is not keeping up with increasing density. Parking is becoming an important commodity for employers and workers and a related issue is security of workers particularly in early and late hours of darkness and in isolated areas. One idea around this issue is exploration of a "park-share" program.

Information

Employers identified a number of challenges regarding a perceived lack of information/data. There is an expressed need for increased and improved sector-specific, region-specific and occupational-specific labour market data to aid employers in business planning and decision-making. Employers need access to labour market intelligence on impacts of emerging trends like automation. There is a desire for greater employer involvement in internal and external Surrey development planning, (e.g. regional transit). Employers would benefit from opportunities and initiatives that offer greater coordination and collaboration.



Coordination and Cohesion

Employers commented on the extensive array of service providers serving labour force participants and others in Surrey, including the school system, public post-secondary institutions, private training institutes, employment service providers, immigrant settlement and employment service providers, Indigenous employment and training service providers, third-party consultant specialists and others. While this range and level of service bodes well for unemployed and underemployed workers and employers needing talent in Surrey, some employers are confused about how to tap into this network and also are concerned about potential overlap and duplication.

Employers see the need for enhanced communication and coordination among and with service providers in Surrey to better connect workforce supply and demand. Relatedly, employers and others call for greater leveraging of existing and new City, BC and Canadian government programs and funding for Surrey employers and workers as part of a Surrey Workforce Strategy.

Employers also desire to see a higher level of collaboration and coordination and information sharing/networking among employers within the same sectors and across sectors and town centres around common needs and solutions.

Specific Areas of Concern

Several specific Surrey workforce challenges were identified by Surrey employers and others over the course of the primary research. These are highlighted below:

1. **Current job vacancies** – Labour and skills shortages were an important theme amongst respondents, particularly in occupations requiring higher levels of education and training. At least one job vacancy was reported by 57% of all employers (n=113), with businesses operating in health care and social assistance; professional, scientific and technical; and manufacturing reporting vacancies across most major occupations. Among those employers reporting current vacancies, 40 are defined as small employers (less than 50 workers) and 25 are defined as large employers (more than 50 workers).

2. **Competition for talent** – being the second largest city in the Lower Mainland, Surrey companies compete with surrounding communities for talent, with the City of Vancouver being the primary draw in the region. Competition among Surrey employers for skilled workers will likely become increasingly intense as businesses grow.

3. Growth will be hampered without interventions aimed at **increasing the supply of workers** with appropriate skills, motivation including loyalty, initiative, willingness to alter unrealistic expectations for high wages, access to transportation and affordable accommodation. Employers will experience varying levels of shortages in workers across the continuum from low-skilled to high-skilled occupations. No industry or occupational group may be immune to this reality and the effects will be manifested in different ways.

4. Employers facing labour and skills challenges report that they are typically **challenged both recruiting and retaining needed workers**. Compensation is an important factor amongst all employers, but more so among small employers who have difficulty paying higher wage levels. This results in high turnover rates as workers frequently seek higher paying job opportunities. Associated work challenges, such as housing affordability, cost of living expenses and inadequate transit options, are also major deterrents impacting workers in lower wage occupations. This is an important consideration for many employers having difficulty both attracting and retaining workers in Surrey operations.

5. **Graduates of education and training programming** at all levels are a key source of labour for employers at both entry-level and higher skilled positions. However, employers generally agree that too few experiential programs are currently available to Surrey students at either the high school or post-secondary level, limiting their progress in the workplace.

6. Employers indicated that technology, including **automation** will impact the workforce in a number of ways, particularly in industries that are data-driven and in production/manufacturing environments where automation can be introduced or enhanced - and managed efficiently.

7. **Surrey's location** will, on balance, continues to be attractive when compared to neighbouring Vancouver in terms of affordability, transportation and opportunities for growth. Given the likely increase in labour force demand, Surrey will continue to offer an expanding mix of employment opportunities on the supply side. Despite being relatively lower than Vancouver and some other communities, the rising cost of living in Surrey has created an affordability challenge for Surrey based workers and others, including housing costs, transportation costs, child-care costs, etc.

8. Businesses identified a number of **existing and potential labour sources** including high school and post-secondary graduates, however, skill gaps requiring additional formal and on-the-job training remain as barriers to hiring 'right out of school'. Opportunities exist for better workplace exposure options for students.

9. **Immigrants and equity-seeking groups are seen as generally positive sources** of workers however employers repeatedly mentioned the importance of being able to find the 'right' fit in terms knowledge, skills and experience – regardless of the source of labour supply.
10. Surrey businesses expressed concerns about a **lack of good, current information** on labour force development initiatives and other supports. Those who identified specific policy improvements focused on high profile programs like the limitations of the Temporary Foreign Worker initiative and barriers that prevent or inhibit the efficient inflow of skilled workers in high demand occupations. However, overall, there were limited recommendations on public policy options that would help Surrey employers address their workforce challenges.
11. Employers also had relatively few examples of **successful workforce practices** that could be introduced, expanded or built upon to help Surrey employers with workforce issues. This was supplemented by promising practices from the secondary research phase and during analysis and engagement.
12. While Surrey's economic growth has resulted in job opportunities, it does not possess the **social and cultural amenities** of Vancouver, which is particularly attractive to younger workers.
13. It is difficult to recruit workers to Surrey, particularly in the **trades** where demand for new workers in industry is high, (e.g. specialized machine operators). Training program availability in Surrey is not considered adequate by employers to produce the number of skilled tradespersons and technicians needed to meet demand.

Filling Information Gaps

While the research and engagement in this project has involved significant breadth and depth, there were topic or issue areas that were sparse in information. These involved a few key sectors, a few key organizations and a few workforce groups:

- There has been little input from the City of Surrey – a major employer, a public policy body and a determinant of economic development and other drivers affecting workforce supply and demand.
- Construction, health and technology sectors are important Surrey sectors and were underrepresented in some of the research.
- Trades training and high school foundational programming were raised throughout the research and it would be useful to be briefed by the Industry Training Authority on its current and future initiatives and what it perceives is happening in Surrey.
- Employers spoke relatively little about tapping into the talent of Indigenous people and persons with disability as talent pools.

Subsequent to the primary research, HCS followed up to engage a number of organizations representing the above information gaps and these were factored into the final Surrey Workforce Strategy document.

Overall Conclusions

This secondary and primary research report has identified and substantiated a number of key workforce trends, the influences on or drivers of these trends and the needs of employers, service deliverers and labour force participants in Surrey in order for effective labour market functioning in BC's fastest growing and soon-to-be largest city.

From a summary synthesis of the large amount of research for this Project, a number of labour market demand, supply and demand/supply issues emerge for consideration of a Surrey Workforce Strategy:

- Labour Demand Issues/Needs
  - The need to better identify and respond to critical vacancies among Surrey employers on an ongoing basis.
  - Flexible, innovative and yet practical ('Surrey unique') solutions to Surrey employer talent attraction and retention challenges.
  - Understanding and educating all Surrey labour market partners (including young people) on the impact of automation and other technology on workforce demand and supply.
  - Identifying and supporting key Surrey growth sectors in recruiting, attracting and retaining talent.
  - Encouraging Surrey employers to engage with all potential talent pools or as many as possible.
  - Surrey employers and Surrey (as a whole) needs to work together on attracting talent, showing a strong value proposition to job-seekers vis-à-vis employers in competing communities and regions.

- Promoting Surrey's (as a whole) strengths to attract and retain talent and influencing levels of government and others to improve infrastructure, amenities and policies and programs.
- Many Surrey employers need access to resources (i.e. information, tools, best practices, etc.) to increase their capacity for talent attraction and retention.

- Labour Supply Issues/Needs
  - Enhancing the readiness and utilization of unemployed and underemployed/underutilized workers in Surrey, including those members of underrepresented labour force groups.
  - Working with Surrey education and training providers to deliver flexible, relevant job-specific skills training, especially in advanced manufacturing, technology and trades.
  - Increasing Surrey employer awareness and recruitment of persons with disabilities and Indigenous people.
  - Enhancing and better coordinating training and employment services for newcomers and refugees, including easier competency recognition and sector-specific English language training.
  - Better preparation of and connection with employers for K-12 and post-secondary students in Surrey for the world of work.
  - Improved coordination and integrated connections with Surrey employers among Surrey service providers.
- Labour Demand/Supply Issues/Needs
  - More accessible, timely and reliable Surrey-specific labour market information (i.e. demand, supply, gaps).
  - Local (Surrey) joint labour market and workforce planning among labour market partners focused on adapting regional, provincial and federal strategies, programs and cases to the Surrey workforce needs.
  - Greater cohesion, information-sharing on 'one-stop' approaches among employers and education and service providers and government agencies on workforce solutions in Surrey
  - Stronger, sustainable mechanisms to keep Surrey employers connected with K-12 schools and post-secondary institutions and to enable two-way information sharing and input.

Further, in reflecting on this research for the Surrey Labour Market Priorities Project, three key concepts have emerged that were central to the development of the Surrey Workforce Strategy:

1. **Improving labour market demand-supply connections and addressing gaps** – Strong, clear linkages are needed among Surrey employers, providers of education, training and workforce services in Surrey and Surrey labour force participants. These more reliable connections are needed in order to increase the supply of qualified, motivated and employment ready graduates and other job seekers to support the productivity, competitiveness and growth of Surrey businesses.
2. **Improving the functioning of the Surrey workforce ecosystem** – The recognition of a workforce ecosystem and the interrelationships among its entities and the drivers and factors that influence it and/or are influenced by it need to be reflected in a Surrey Workforce Strategy.
3. **Improving the readiness and utilization of the Surrey labour force, particularly members of underrepresented groups** – Surrey employers and industry groups call for enhancements in the preparation for work of high school students, post-secondary students and unemployed or

underemployed job seekers. At the same time, employers need awareness, information, support and better coordination among service providers in order to increase the quality and quantity of their hiring, onboarding and retention of members of underutilized and underrepresented labour force groups.

Better connections among Surrey labour market partners – namely employers, employees, labour force participants and service deliverers – need to be a central part of a Surrey Workforce Strategy. The Surrey Workforce Strategy will provide support and encouragement for these partners before, during and after the beginning of employment.

This concept of a workforce ecosystem also reflects the importance of a Strategy needing to involve influencing major drivers, community infrastructure, community amenities and local and senior government policies that do and/or will affect workforce development and talent attraction and retention in Surrey.

The specific and detailed implications of the extensive secondary and primary research undertaken in the Surrey Labour Market Priorities Project are clearly and directly reflected in the strategic context, strategic direction, strategic priorities and tactics and implementation of the Surrey Workforce Strategy that was developed after this research.

Sincere thanks to the almost 200 voices the Project heard from and for the previous research and information gathered during this Project over the last eight months.

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Introduction and Background

This combined research report serves the Workforce Strategy's audience(s) with a clear and single-source picture of how the strategy was arrived at, and the key factors and drivers that led to its development.

The combined research stands as a significant piece of labour market information in its own right. One of the frequently stated observations as the project team conducted the research and met with the Steering Committee is that there is a pronounced absence of current and representative Surrey labour market and labour force input from the employers' perspective.

This report represents the findings and recommendations of the primary and secondary research, and also represents the voices and current experience of several hundred Surrey employers and community stakeholders.

The Research Report forms part of the ongoing communication and resource base for the project. The SBOT will profile the Workforce Strategy and the supporting research through its existing and extensive business and community marketing channels. Providing the business and employer community with the research report that supports the Workforce Strategy builds support and broader buy-in for the Strategy itself.

The current Steering Committee will evolve into an ongoing Surrey Workforce Development Council. While it is logical to assume that some members of the Steering Committee will transition forward into the Council, it is also clear that this Council will recruit and engage new and additional members. This Research Report will serve the Council as a key knowledge base for their understanding and participation in implementing the Strategy and as an ongoing reference as it fully explores challenges possibilities in Surrey. It will also inform other Surrey stakeholders that have been less involved so that they have an understanding of the research and engagement basis for the Surrey Workforce Strategy.

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Secondary Research

The Surrey Board of Trade (SBOT), with BC Ministry of Social Development and Poverty Reduction funding and key partners implemented this research and strategy development project for the purposes of determining Surrey's current and anticipated labour market demand, labour supply and labour demand/supply gaps or imbalances for the next 10 years. The project serves as a benchmark from which future trends can be measured and compared. The following project deliverables were completed:

- Identifying current and future labour market demand, labour supply and labour demand/supply gaps in Surrey over the next ten years;
- Identifying key labour market challenges and barriers to Surrey businesses recruiting, developing and retaining the talent they need to succeed and grow;
- Identifying key industry sectors critical to the growth of the Surrey economy and identify the skills and talent they need to succeed;
- Engaging and identifying the optimal roles of the Surrey business community and other stakeholders for the successful implementation of a Surrey Workforce Strategy; and,
- Create and plan the implementation of a comprehensive, inclusive Surrey Workforce Strategy that is embraced and contributed to by key business and stakeholder organizations.

This work started with the following two deliverables identified by HCS, which formed the purpose of the "Secondary Research and Promising Practices Report: Surrey Labour Market Priorities Project."

1. To conduct secondary research including a review of relevant literature and analysis of existing labour market demand, supply and demand-supply gaps; and,
2. To complete a best (or "promising") practices scan on successful regional and local labour market strategies in BC and elsewhere.

Specifically, this element of the research report describes the findings of HCS' secondary research and informed the:

- Primary research design and planning;
- Employer and other stakeholder engagement, including identifying major Surrey employers and key industry sectors; and,
- Development of a Surrey Workforce Strategy.

Economic, Labour Market and Related Data Analysis

The City of Surrey is the second largest municipality in British Columbia with a 2016 population of 518,000 residents[2]. The city is one of the fastest growing and most diverse communities in Canada, adding close to 10,000 residents annually since 2011. With the largest developable land base in the Lower Mainland/Southwest (MSW) region, Surrey's resident population is projected to reach close to 650,000 by 2026 and 738,000 by 2036[3] – a growth rate of more than 2% annually over the next 20 years. This is positive news for the city's growth potential and expansion of its labour force to accommodate the inflow of new residents.

Possessing a rapidly growing and dynamic economy, Surrey is striving to maintain a balance between its agricultural heritage and its evolution as a dual metropolitan centre within the Greater Vancouver region. The city currently has 38% of the region's available industrial land base, providing significant development opportunities to leverage employment lands to shape the future economy. It has made it a priority to build a strong foundation to facilitate sustainable growth and is prepared to leverage modern environmental, social and technological trends to position Surrey as a progressive future-oriented metropolitan centre.

The City's geographic size and diverse population are strong assets that can be harnessed to meet the future needs of all residents. Forty-three percent of Surrey's population is comprised of immigrants with more than 100 languages spoken, while one-third of the population is under 20 years of age. For the first time in its history, instead of being a net exporter of talent, Surrey is increasingly drawing talent from across the region and beyond to fuel its economic growth. The opportunity is here to build a sustainable city where residents live, work, play and enjoy a high quality of life. For this vision to be realized, Surrey must adopt a forward-thinking mindset to ensure that the civic infrastructure and economic base support the city's diverse communities and accommodate a rapidly growing population.

This work has already begun – with major strategic investments, such as the relocation of City Hall to Surrey City Centre, and the development of the Civic Hotel, Surrey's first luxury hotel, have been completed, marking the first phase in Surrey's journey toward realizing its position as a metropolitan centre.

The second phase of the transformation of the City Centre will be marked by a focused effort to shape the area into a regional "transaction" hub for major firms to expand their services and offerings into growing markets, such as the Fraser Valley region, as well as more lucrative markets in the United States through Washington State. Surrey's vision of becoming the regional nexus for commerce and a nationally recognized centre for innovation is very much in sight.

Geographically, as Figure 4 shows, Surrey is defined as a Census Subdivision (CSD) located in the southwest corner of BC's Lower Mainland and contained within Vancouver's Census Metropolitan Area (Metro Vancouver). It is also part of the wider Lower Mainland/Southwest (MSW) economic region which includes the Fraser Valley, Sunshine Coast, Metro Vancouver and north to Lillooet.

[2] Census 2016
[3] BC Stats Population Projections

Figure 4 - Map of Vancouver CMA

Map of Vancouver Census Metropolitan Area

Source: Statistics Canada.

The following secondary analysis of the City of Surrey relies on various socio-economic data sets provided by Statistics Canada, BC Stats, City of Surrey and related sources such as WorkBC's *BC Labour Market Outlook 2018*. Most of the data available is aggregated above the CSD level, thereby complicating analyses at the CSD or city level. Much of this report therefore relies on Census data from 2016 and prior to build assumptions and enable a more detailed analysis for the City of Surrey.

Economic Analysis

For the last five years, the provincial economy has experienced robust growth largely driven by real estate and construction activity in BC's Lower Mainland, as well as manufacturing, transportation and service sector growth across much of the province (see Figure 5 next page). Metro Vancouver has been Canada's fastest growing metropolitan region for several years, and now accounts for close to 60% of the BC economy[4].

As part of the Metro region, the Surrey economy continues to grow with activity across most goods and services sectors. In 2018, as per Figure 5, Surrey accounted for 21% of the regional economy with an economic contribution estimated at $29 billion (Gross Domestic Product) [5]. This represents an increase of close to $5 billion in added value since 2014. Growth is expected to moderate in Metro Vancouver and Surrey in 2019 and 2020, as real estate and construction activity level off due to rising interest rates and stricter mortgage requirements.

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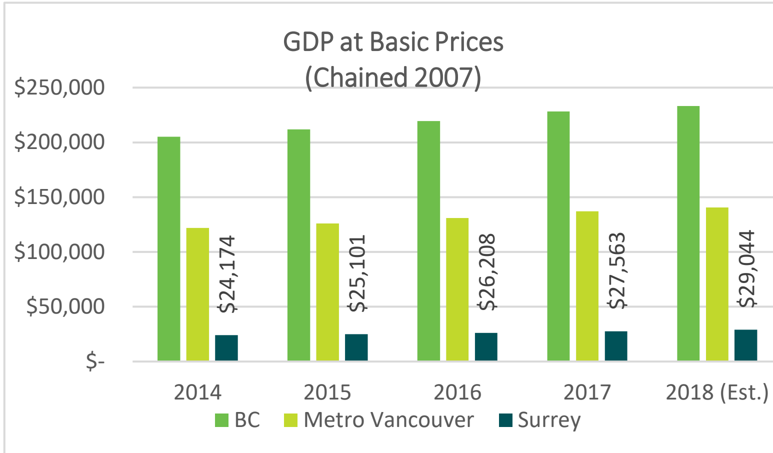
[4] Estimate may differ depending on which GDP metric or deflator adopted for analysis (e.g. chained $2007)

[5] GDP at basic prices equals GDP at market prices minus taxes and subsidies on products. GDP estimates are provided at the provincial and CMA level as provided by Statistics Canada and the Conference Board of Canada. GDP estimates for the City of Surrey were developed using a per capita basis.

Figure 5 - Estimated GDP BC, Metro Vancouver and Surrey



Statistics Canada Table 381-0036; Conference Board of Canada

Business Development Data Analysis

Surrey has a strong, innovative and sustainable economy, in large part due to the strength of its small business sector. The following section examines small business development in Surrey and the broader Mainland/Southwest (MSW) region, and its contribution to the economy and employment. For the purpose of this analysis, small business is defined as having less than 50 employees. The vast majority of small businesses in Surrey and other jurisdictions possess no "employees".

As Table 1 shows, Surrey saw the total number of businesses grow from 94,000 to 108,500 between 2014 and 2018, an increase of more than 15%. Over the same period, the total number of businesses in the MSW region increased by nearly 12%. Surrey's share of small businesses (with or without employees) in the MSW region continues to climb, illustrating the dynamic nature of the City's economy. Although data is not available at the CSD level, business growth by industry within Surrey would closely resemble that for the region as whole. This is consistent with the City of Surrey's economic diversification strategy to grow opportunities in advanced technologies, creative arts, and professional and business services.

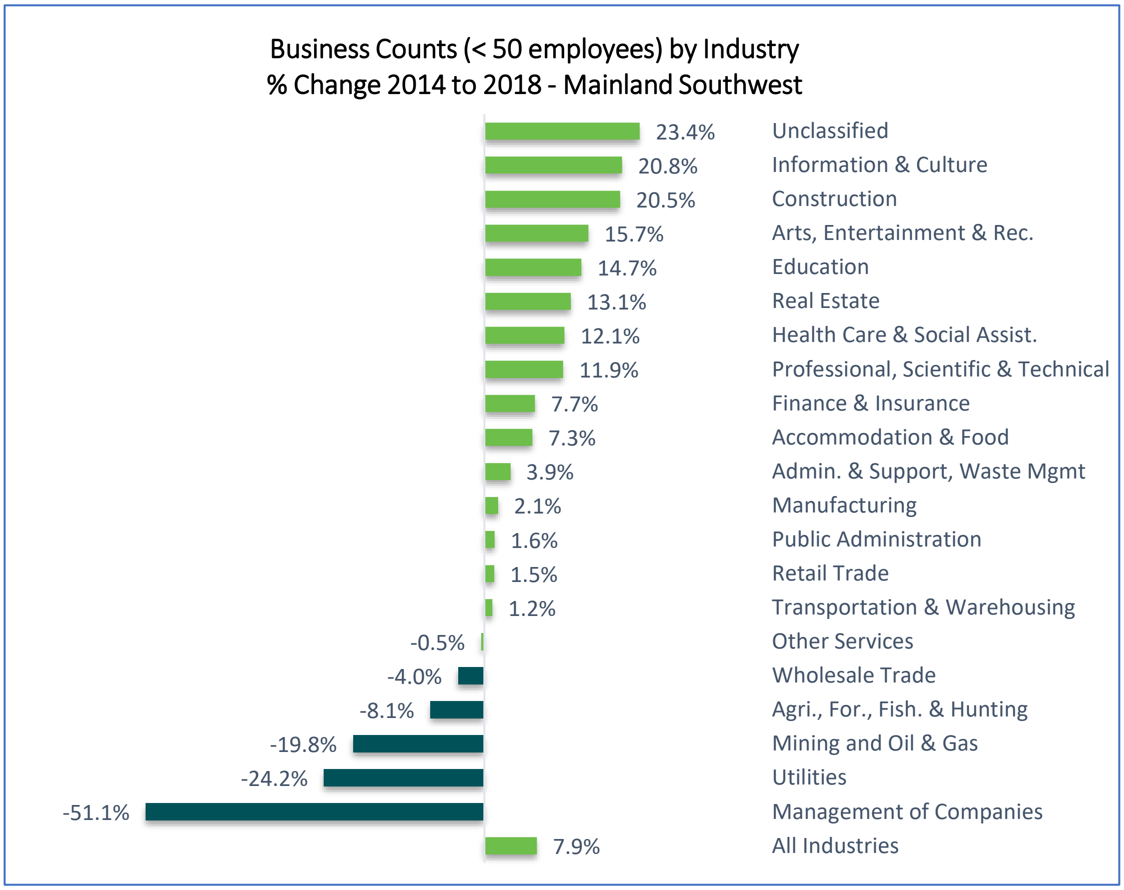
Table 1 - Business Growth in Surrey 2014-2018

Period	Number of Businesses			Number of Employees	
2018	*Total*	*Total Without Employees*	*Total With Employees*	*1-49*	*50+*
Surrey	108,499	89,415	19,084	18,483	601
MSW	713,019	588,488	124,531	119,100	5,431
Surrey % of MSW	15.2%	15.2%	15.3%	15.5%	11.1%
2014	*Total*	*Total Without Employees*	*Total With Employees*	*1-49*	*50+*
Surrey	93,959	77,505	16,454	15,957	497
MSW	638,639	523,465	115,174	110,354	4,820
Surrey % of MSW	14.7%	14.8%	14.3%	14.5%	10.3%

Between 2014 and 2018, the number of small businesses (with and without employees) in BC climbed 8.8% per cent, of which most have been concentrated in the Mainland/Southwest (MSW) economic region, encompassing both Metro Vancouver and Surrey. As per Figure 6, the number of registered businesses with fewer than 50 employees in the MSW region was 119,100 in 2018, an increase of 7.9% from 2014. Apart from the construction industry, business growth occurred primarily in the service sector.

The decline in the number of registered businesses in the goods-producing sector was likely the result of industry consolidation and advanced automation[6]. These industries have otherwise experienced above-average growth in recent years.

Figure 6 - Small Business Counts Percentage Change 2014 to 2018



Statistics Canada, Business Register; BC Stats

As per Figures 7 and 8 (next page), business formations across the MSW region and Surrey have recently trended lower following a strong surge of growth through 2016. Between 2014 and 2018, Surrey's share of incorporations consistently outpaced the broader MSW region, again reflecting the high level of economic activity in the City[7]. The decline in incorporations beginning 2017 may be the result of the slowdown in real

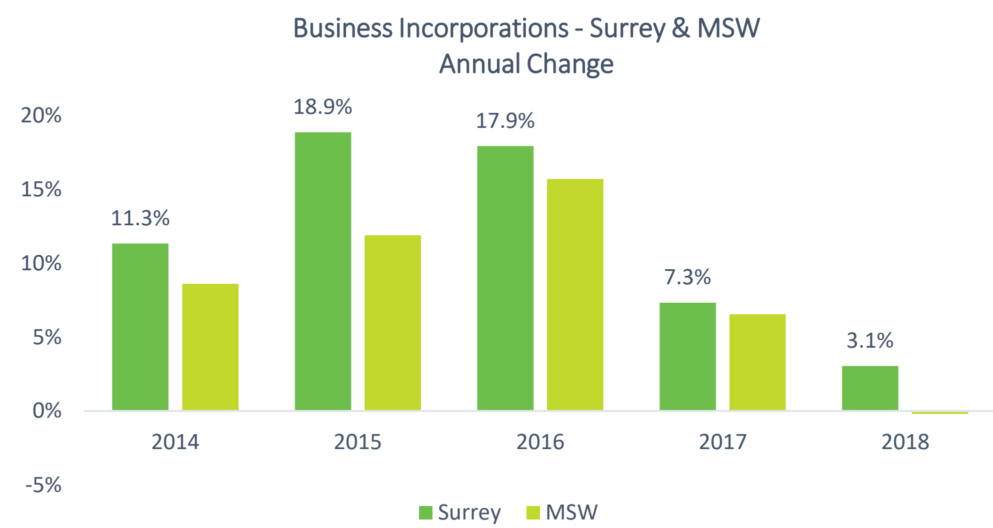
[6] Statistics Canada, Business Register; BC Stats

[7] Office of the Superintendent of Bankruptcy Canada; BC Stats

estate and construction across the region. These industries have a strong ripple effect through the broader economy and tend to attract new businesses when conditions are warranted.

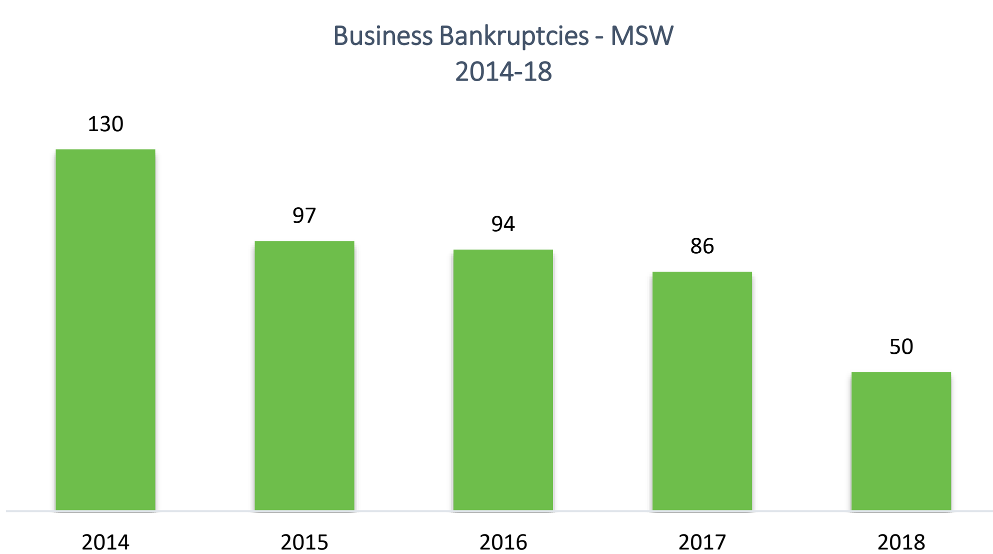
A similar downward trend is evident in the number of business bankruptcies where numbers have been falling since 2014. This, too, is a positive indicator illustrating resilience within the broader economy.

Figure 7 - Business Incorporations Surrey and MSW



Office of the Superintendent of Bankruptcy Canada; BC Stats

Figure 8 - Business Bankruptcies 2014-2018



Office of the Superintendent of Bankruptcy Canada; BC Stats

Population Data Analysis

Table 2 (below) summarizes population trends comparing Surrey and the Metro Vancouver region for 2011 and 2016. This characterizes a faster growing and younger population than in the broader MSW region. Over three-quarters of the Surrey population growth during 2011-2016 was from international migration – this appears even more significant when one considers that only 36% of Metro Vancouver's population growth was driven by immigration during this period.

Table 2 - Population Trend Comparison

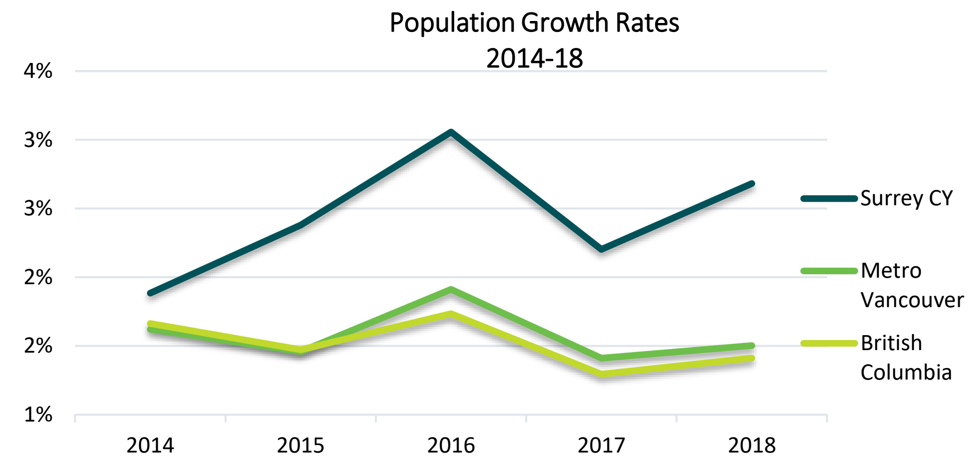
Population			
Surrey	**2016**	**2011**	**Change**
Population (total)	517,885	468,250	10.6%
Distribution (years)			
- 0-14	92,550 (17.9%)	88,745 (19.0%)	
- 15-64	353,350 (68.0%)	322,940 (69.0%)	
- 65+	72,990 (14.1%)	56,570 (12.1%)	
Median Age	38.7 years	37.5 years	+1.2 years
Migration (status 5 years ago)			
- Intraprovincial	44,835	44,655	
- Interprovincial	9,470	9,520	
- International	37,860	29,905	
Vancouver CMA	**2016**	**2011**	**Change**
Population	2,463,431	2,313,328	6.5%
Distribution:			
- 0-14	362,110 (17.7%)	354,455 (15.3%)	
- 15-64	1,714,005 (69.6%)	1,645,970 (71.2%)	
- 65+	387,315 (15.7%)	312,905 (13.5%)	
Median Age	41.0 years	40.2	+0.8 years
Migrants			
- Intraprovincial	93,805	84,885	
- Interprovincial	23,760	19,005	
- International	54,095	45,775	

Statistics Canada. Census 2016

The Vancouver CMA (Metro Vancouver) is BC's largest populated region containing more than half (53%) of the BC population in 2018. Surrey is currently home to more than one-in-five (21%) of Metro Vancouver residents according to the *2016 Census*. Over the last 20 years, the City's population has been rapidly growing at an annual rate surpassing both Metro Vancouver and the rest of BC. Since 2014, Surrey added close to 65,000 residents while growing at an annual rate of 2.5%. Surrey is on track to becoming the most populated city in BC in less than 25 years – by 2041 – as an estimated 260,000 people from around the world seek to make a new life in one of Canada's most culturally diverse cities[8].

[8] BC Stats; Surrey Planning & Development Department

Figure 9 - Population Growth Rates BC, Metro Vancouver and Surrey 2014-2018

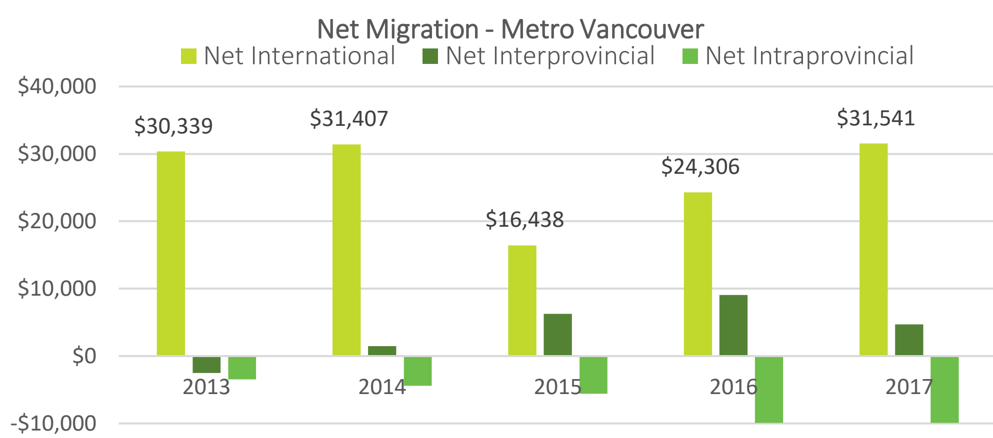


BC Stats, Population Estimates; Surrey Planning & Development Department

International migration is the primary driver of population growth in Metro Vancouver and Surrey, with India (81,730), the Philippines (24,120) and China (18,490) the main source countries to the region. Metro Vancouver received almost 29,000 *net* international migrants each year between 2013 and 2017, while averaging a net outflow of intraprovincial migrants (-6,600) over the same period[9]. Although the data is not specific to Surrey, the city's population accounts for more than 21% of Metro Vancouver and receives a somewhat higher proportional share of immigrants annually.

According to the *2016 Census*, Metro Vancouver received an average of 28,500 immigrants between 2011 and 2016, of which more than 25% located in Surrey. Today an estimated 43% of Surrey's total population are immigrants. The Surrey newcomer profile is also reflected in the fact that 51% of its residents speak a language other than English or French – 102 languages are spoken in Surrey.[10]

Figure 10 - Net Migration Metro Vancouver



Statistics Canada, Table 051-0063; Census; BC Stats

[9] *Statistics Canada, Table 051-0063; Census; BC Stats*
[10] Statistics Canada. Census 2016

Surrey's resident population is also one of the youngest in BC, with a median age in 2016 of 38.7 years and a population less than 15 years accounting for 18% of the total. In comparison, the median age of Metro Vancouver's population is just under 41 years, while those less than 15 years account for 14.7% of the total population.

Overall, as was explored in the development of the Surrey Workforce Strategy, there are many potential sources of labour – or 'talent pools' – from which employers can attract and recruit.

Education Analysis

Table 3 below shows the relative education levels of Surrey and Greater Vancouver residents in 2011 and 2016. Overall, Surrey has a population with lower educational attainment then Greater Vancouver. For example, in 2016, 42% of the Surrey working age population possessed no post-K-12 certification, (i.e. apprenticeship, college or university), compared to 32% of the population in the broader region. The positive news is that from 2011 to 2016, the number of Surrey residents with a college or university credential rose by 17% and 24.5% respectively. Unfortunately, the number of workers with an apprenticeship or trades credential decreased by 13% during this period. The increasing programming of public post-secondary institutions and private training institutions appear to be increasing the number of Surrey residents with a post-K-12 credential in response to growing demand for higher skilled workers.

Table 3 - Relative Education Levels

Education			
Surrey	2016	2011	Change
Education – Highest Certificate (25-64 years)	280,900 (100%)	256,930 (100%)	9.3%
- No Certificate	35,180 (12.5%)	32,700 (12.7%)	7.6%
- High School	82,810 (29.5%)	73,755 (28.7%)	12.3%
- Apprenticeship or Trades	20,550 (7.3%)	23,630 (9.2%)	-13.0%
- College	54,145 (19.3%)	46,145 (18.0%)	17.3%
- University (less than Bachelor)	12,305 (4.4%)	19,720 (7.7%)	-37.6%
- University (bachelor or above)	75,915 (27.0%)	60,980 (23.7%)	24.5%
Vancouver CMA	2016	2011	Change
Education – Highest Certificate (25-64 years)	1,392,440 (100%)	1,330,725 (100%)	4.6%
- No Certificate	111,575 (8.0%)	111,340 (8.4%)	0.2%
- High School	339,185 (24.4%)	306,890 (23.1%)	10.5%
- Apprenticeship or Trades	93,815 (6.7%)	113,380 (8.5%)	-17.3%
- College	267,620 (19.2%)	247,680 (18.6%)	8.1%
- University (less than Bachelor)	58,545 (4.2%)	97,550 (7.3%)	-40.0%
- University (Bachelor and above)	521,700 (37.5%)	453,890 (34.1%)	14.9%

Census 2016

Labour Market Analysis

The Surrey labour market continues to expand in line with a growing population and increasing demand for workers across most industries. Unemployment trended downwards from 7.9% to 6.5% between 2011 and 2016, highlighting a more active economy and a progressive tightening of the Surrey labour market. The following analysis examines changes in the Surrey labour force between 2011 and 2016 for both Surrey and the Vancouver CMA, as well as comparisons between Surrey and the broader Mainland/Southwest economic region. Employment growth and related projections are available at the MSW region only.

Labour Force

The Surrey labour force was estimated at just under 275,000 workers in 2016, an increase of more than 12% since 2011. As a share of the Vancouver CMA labour force, Surrey accounted for more than 20% of Metro Vancouver's 1.36 million workers. What is noticeable in this data table is the change in full and part-time work from 2011 to 2016. While part-time work is increasing throughout the economy, these results are not considered an accurate characterization of work activity, as the survey methodology was changed under the National Household Survey in 2011.

Table 4 (below) compares the Surrey and Greater Vancouver labour forces in 2011 and 2016.

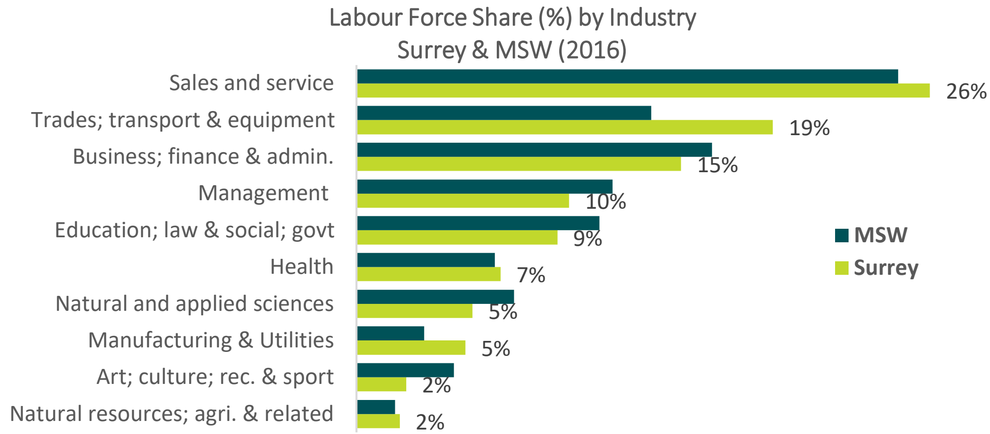
Table 4 - Labour Force Comparison CMA and Surrey 2011 and 2016

Labour Force			
Surrey	**2016**	**2011**	**Change**
Labour Force (15+)	274,690	245,645	11.8%
Participation Rate	65.5%	65.6%	-0.1%
Unemployment Rate	6.5%	7.9%	-1.4%
Work Activity:			
- Full-time	127,985	183,165	-30.1%
- Part-time	152,700	47,275	223.0%
Class of Worker:			
- Employee	237,120	213,380	11.1%
- Self-employed	31,800	26,090	21.9%
- Average Weeks	41.8	44.2	-2.4 weeks
Vancouver CMA	**2016**	**2011**	**Change**
Labour Force (15+)	1,355,520	1,273,335	6.5%
Participation Rate	65.7%	66.1%	-0.4%
Unemployment Rate	5.8%	7.1%	-1.3%
Work Activity:			
- Full-time	657,640	941,600	-30.2%
- Part-time	741,460	262,430	182.5%
- Average Weeks	42.2	44.3	-2.1 weeks
Class of Worker:			
- Employee	1,308,545	1,089,895	20.1%
- Self-employed	208,335	155,860	33.7%

Census 2016

The Surrey labour force is differentiated from the broader MSW region by its greater proportional reliance on certain industrial sectors. Surrey's labour force has a larger share of workers in such industries as trades & transport, manufacturing and, to a lesser degree, its natural resource sector (Figure 11). These industries remain critical to the growth and development of the City's future economy.

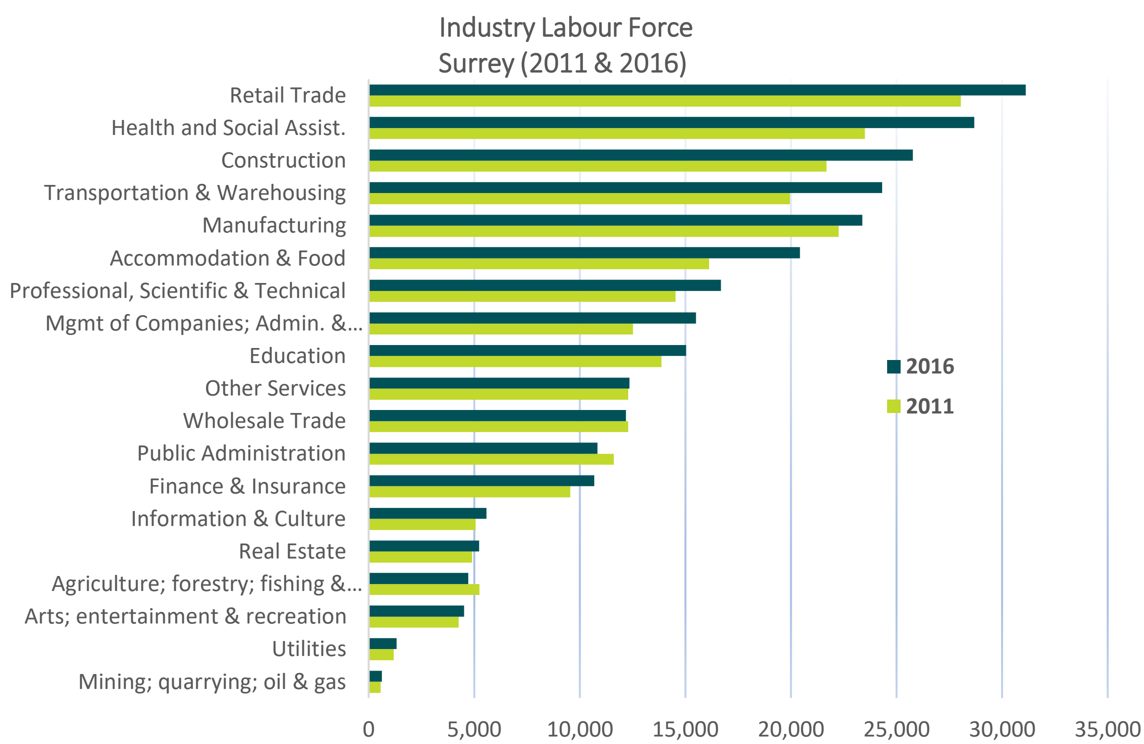
Figure 11 - Labour Force Share



Statistics Canada, Census 2016

The Surrey labour force grew at an annual rate of 2.5% between 2011 and 2016, far outpacing the annual rate of 1.4% for the broader MSW region. As shown in Figure 12, Surrey's labour force experienced above average growth across several service industries, including accommodation & food; management of companies; administration, support and waste; and health & social assistance. Labour force growth in Surrey's construction industry led the City's goods-producing sector over this period. Conversely, agriculture and related primary industries, as well as public administration and wholesale trade experienced negative labour force growth over this period.

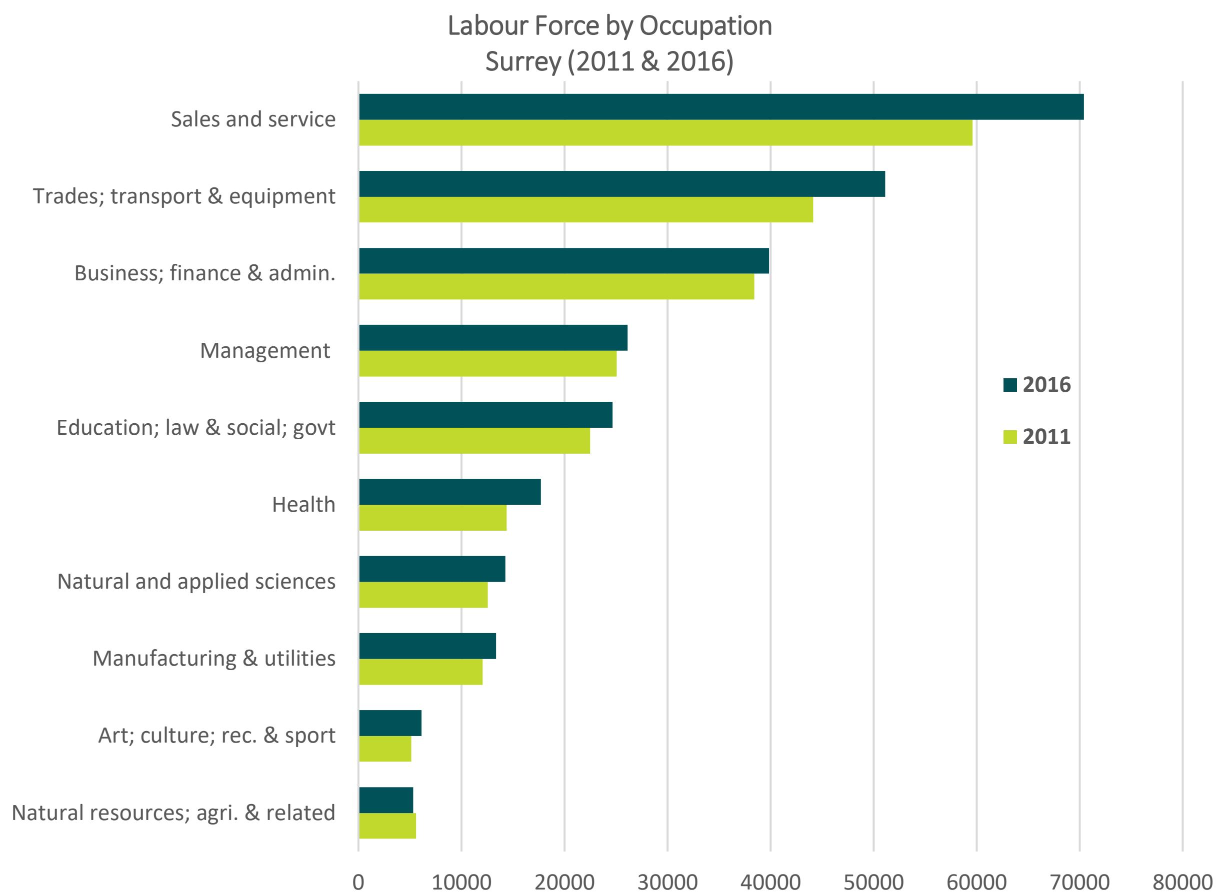
Figure 12 - Industry Labour Force 2011 and 2016



Statistics Canada, Census 2016; National Household Survey 2011

Figure 13 shows that except for natural resources, agriculture & related industries, the Surrey labour force experienced positive growth across all major occupational groups between 2011 and 2016. Occupational growth was particularly evident in: sales and services jobs (18%); trades, transport & equipment operators (16%); and health-related occupations (23%).

Figure 13 - Labour Force by Occupation



Statistics Canada, Census 2016; National Household Survey 2011

Additional labour force issues for Surrey workers are increasing housing costs (owning and renting) in Surrey and Metro Vancouver and transportation challenges, including the need for better public transit and commuting time for workers traveling from and to Surrey.

For instance, 44% of the Surrey labour force commuted to work within the city in 2016, while 54% traveled outside of the city to work, mostly to adjacent communities (Statistics Canada, Census 2016) or the larger Metro Vancouver region. This compares to the overall provincial average of 46% who commute to outside their community. Also, in terms of commuting time, 16% of Surrey labour force participants in 2016 commuted a duration of 60 minutes or more. This compares with 11% in Metro Vancouver and 9% across the whole province.

Housing and transportation issues as they relate to labour market demand and supply and workforce issues were further investigated in the primary research phase of this project.

Employment and Unemployment

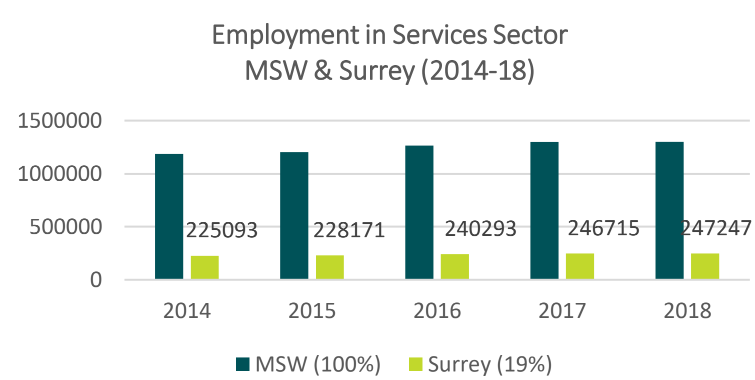
Current employment and unemployment figures are provided by the Labour Force Survey for industries at the MSW regional level through 2018. Results show a strong increase in employment through 2018 and sharply declining levels of unemployment in both the goods and service producing sectors. Estimates for the Surrey economy are based on the proportional share of workers in MSW's goods and services labour force in 2016. In this case, the analysis assumes the share of Surrey's labour force relative to the MSW remains constant for the period. In 2016 Surrey accounted for 14% of MSW's goods producing labour force and 19% of the service producing labour force. Together, Surrey accounts for 17.7% of the total MSW labour force.

As shown in Figures 14 and 15 (below), employment in the MSW goods sector increased by close to 54,000 jobs between 2014 and 2018, an annual growth rate of 4%. Based on this rate, Surrey's goods producing sector is estimated to have added more than 6,000 jobs over the same period. The rate of growth in the region's goods sector was double the rate of growth for the services sector (2%). This is a bullish indicator for Surrey's growing economic base.

Figure 14 - Employment in Goods Sector

Statistics Canada, Labour Force Survey (Custom Tab.)

Figure 15 - Employment in Services Sector



Statistics Canada, Labour Force Survey (Custom Tab.)

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Unemployment in both the goods and services sectors correspondingly trended downwards over the same period. For the goods sector, the unemployment rate for the region fell from 5.9% in 2014 to 2.7% in 2018, and from 3.5% to 2.5% in the services sector over the same period. At these current rates – which might be considered "full" employment – the potential for labour shortages intensifies. Many employers will find it necessary to attract workers from outside Surrey and the MSW region, as well as utilize more effectively the skills of underemployed workers. The adoption of new technologies to boost productivity (i.e., output per worker) becomes an overarching priority for employers.

Employment Projections (2028)

Employment projections have been developed for both Surrey and MSW economic region using the 2018 edition of the *BC Labour Market Outlook* produced by the Ministry of Jobs, Trade & Technology. Estimates for the Surrey economy are based on the proportional share of workers in the MSW labour force by individual industry and occupation in 2016. Through 2028, employment demand is anticipated to increase 1.2 percent on average each year, which is faster than the BC annual average growth rate of 1.1 percent. As previously indicated, the Surrey economy accounts for an estimated 17.7% of employment in the MSW region.

Table 5 shows that in 2018 Surrey employed an estimated 288,000 workers, which is consistent with other estimates based on Labour Force Survey data (above). Employment demand is projected to increase by a total of 11.8% over the next 10 years (1.2% annually). Industries with above average employment demand over this period include professional, scientific and technical, health and social assistance, transportation and warehousing, and accommodation and food, while projections for Surrey's primary resource industries are expected to decline. Employment demand overall is projected to accelerate in the 2023-2028 period.

Table 5 - Employment Baseline and Projections by Industry

Industry	Employment Baseline			Projected Employment – Surrey		
	MSW 2018	*Surrey % Share*	Surrey 2018	2023	2028	% (10 years)
Agriculture, forestry, fishing & hunting	16,560	*19.6%*	3,253	3,235	3,228	-0.8%
Mining, quarrying, oil & gas	6,159	*11.2%*	690	779	833	20.7%
Utilities	8,507	*17.6%*	1,499	1,525	1,558	4.0%
Construction	144,978	*21.8%*	31,593	29,906	32,640	3.3%
Manufacturing	117,769	*23.5%*	27,633	27,792	28,051	1.5%
Wholesale trade	67,637	*19.9%*	13,432	14,197	14,701	9.5%
Retail trade	184,318	*18.2%*	33,594	34,605	35,825	6.6%
Transportation & warehousing	99,458	*28.1%*	27,918	29,968	32,246	15.5%
Information & culture	55,478	*10.5%*	5,842	6,535	7,306	25.1%
Finance & insurance	74,261	*15.3%*	11,333	12,215	12,889	13.7%
Real Estate	38,988	*13.5%*	5,280	5,399	5,690	7.8%
Professional, scientific & tech.	149,986	*11.7%*	17,544	19,667	22,331	27.3%
Management of companies; admin. & support; waste	71,507	*21.1%*	15,060	16,336	16,877	12.1%
Education	107,678	*13.4%*	14,481	14,824	15,472	6.8%
Health & social assistance	183,355	*18.3%*	33,559	36,990	41,058	22.3%

Industry	Employment Baseline			Projected Employment – Surrey		
	MSW 2018	*Surrey % Share*	Surrey 2018	2023	2028	% (10 years)
Arts, entertainment & rec.	47,323	*12.8%*	6,048	6,431	6,889	13.9%
Accommodation & food	111,920	*16.0%*	17,860	19,452	21,031	17.8%
Other services	67,614	*17.6%*	11,907	12,511	12,902	8.4%
Public administration	55,716	*17.1%*	9,514	9,937	10,496	10.3%
Employment Totals (Growth)	1,609,213	*17.7%*	288,039	302,306 (5.0%)	322,022 (6.5%)	11.8%

BC Labour Market Outlook 2018; Statistics Canada, Census 2016

Employment projections by major occupation provide a similar picture of Surrey's future economy (Table 6, below). Total employment estimates vary slightly due in part to the method in which data is aggregated by industry and occupation, as well as rounding. Occupation groups facing above-average employment demand over the 10-year horizon include natural & applied sciences; health; and arts, culture, recreation & sport.

Table 6 - Employment Baseline and Projections by Occupation

Occupation	Employment Baseline			Projected Employment – Surrey		
	MSW 2018	*Surrey % Share*	Surrey 2018	2023	2028	% (10 years)
Management	191,034	*14.7%*	28,134	29,415	31,260	11.1%
Business; finance and admin.	255,259	*16.2%*	41,295	43,861	46,893	13.6%
Natural and applied sciences	119,368	*13.1%*	15,590	16,862	18,557	19.0%
Health	107,599	*18.5%*	19,876	21,762	24,025	20.9%
Education; law and social; community and gov't	174,180	*14.7%*	25,534	27,033	28,804	12.8%
Art; culture; rec. and sport	74,735	*9.1%*	6,776	7,366	8,074	19.2%
Sales and service	383,002	*18.8%*	71,890	76,065	80,339	11.8%
Trades; transport and equipment operators	229,940	*25.1%*	57,620	58,297	62,244	8.0%
Natural resources; agriculture and related	21,813	*19.9%*	4,344	4,539	4,675	7.6%
Manufacturing and utilities	52,284	*28.5%*	14,923	15,199	15,561	4.3%
Employment Totals (Growth)	1,609,214	*17.8%*	285,983	300,399 (5.0%)	320,433 (6.7%)	12.0%

BC Labour Market Outlook 2018; Census 2016

Projected Job Openings (2028)

Over the next 10 years, a total of 588,470 job openings are anticipated in the MSW regional economy. About two-thirds of job openings are needed to replace exiting workers, the remaining one-third due to economic growth. The MSW region makes up two-thirds (65%) of the Province's total forecasted job openings over the 10-year horizon. Tabled next page are projected openings by industry and major occupation in Surrey. Projections are based on the Surrey economy's share of the MSW labour force in 2016.

Table 7 shows that over the next ten years (2018-2028), total job openings in the Surrey economy will reach an estimated 103,000, or 10,300 each year through 2028. Similar to employment projections above, high demand industries include health & social assistance; transportation & housing; and professional, scientific & technical – all of which will experience above average employment demand over the next 10 years.

Table 7 - Projected Job Openings by Industry

Industry	Total Projected Job Openings				
	MSW 2028	*Surrey % Share*	Surrey 2023	Surrey 2028	% Total Openings
Agriculture, forestry, fishing & hunting	3,970	*19.6%*	390	780	0.8%
Mining, quarrying, oil & gas	3,175	*11.2%*	178	356	0.3%
Utilities	2,600	*17.6%*	229	458	0.4%
Construction	36,495	*21.8%*	3,976	7,953	7.7%
Manufacturing	32,439	*23.5%*	3,806	7,612	7.4%
Wholesale trade	23,819	*19.9%*	2,365	4,730	4.6%
Retail trade	48,696	*18.2%*	4,438	8,876	8.6%
Transportation & warehousing	41,990	*28.1%*	5,893	11,787	11.5%
Information & culture	27,615	*10.5%*	1,454	2,908	2.8%
Finance & insurance	29,546	*15.3%*	2,254	4,509	4.4%
Real Estate	13,456	*13.5%*	911	1,822	1.8%
Professional, scientific & technical	80,118	*11.7%*	4,686	9,371	9.1%
Management of companies, administrative & support, waste	28,042	*21.1%*	2,953	5,906	5.7%
Education	32,883	*13.4%*	2,211	4,422	4.3%
Health & social assistance	88,044	*18.3%*	8,057	16,115	15.7%
Arts, entertainment & recreation	15,871	*12.8%*	1,014	2,028	2.0%
Accommodation & food	37,744	*16.0%*	3,012	6,023	5.9%
Other services	21,158	*17.6%*	1,863	3,726	3.6%
Public administration	20,811	*17.1%*	1,777	3,554	3.5%
Total Job Openings	**588,474**	***17.5%***	**51,467**	**102,934**	**100%**

BC Labour Market Outlook 2018; Census 2016

Total job openings by major occupation vary somewhat from projections by industry, with fewer total openings anticipated in the first five years (Table 8). More than two-thirds of total openings are anticipated in four of the 10 major occupations, led by sales & service; trades, transport & equipment; business, finance & administration; and management occupations. These occupations likewise account for the largest shares of employment in the Surrey economy.

Table 8 - Projected Job Openings by Major Occupation

Occupation	Total Projected Job Openings				
	MSW 2028	*Surrey % Share*	Surrey 2023	Surrey 2028	% Total Openings
Management	82,331	*14.7%*	5,390	12,103	11.8%
Business, finance & administration	102,008	*16.2%*	7,926	16,525	16.2%
Natural & applied sciences	51,225	*13.1%*	3,039	6,710	6.6%
Health	48,917	*18.5%*	4,240	9,050	8.9%
Education, law & social, community & government	64,022	*14.7%*	4,494	9,411	9.2%

Occupation	Total Projected Job Openings				
	MSW 2028	*Surrey % Share*	Surrey 2023	Surrey 2028	% Total Openings
Art, culture, recreation & sport	28,467	*9.1%*	1,190	2,590	2.5%
Sales & service	118,935	*18.8%*	11,021	22,360	21.9%
Trades, transport & equipment operators	69,003	*25.1%*	6,660	17,320	16.9%
Natural resources, agriculture & related	6,647	*19.9%*	688	1,323	1.3%
Manufacturing & utilities	16,920	*28.5%*	2,357	4,822	4.7%
Total Job Openings	**588,475**	***17.4%***	**47,006**	**102,214**	**100.0%**

BC Labour Market Outlook 2018; Census 2016

Supply-Demand Projections

The *BC Labour Market Outlook* provides supply projections for more than 500 occupations through 2028. The Ministry's supply model considers all sources of supply in developing these projections, including general population growth, labour force participation, program graduates and migrants from other jurisdictions. The following analysis (Table 9) of projected supply and demand for workers in Surrey have been consolidated into the 10 major occupations of the economy based on their proportional share of the MSW workforce. The difference is the projected occupational surplus or gap in the Surrey economy through 2028.

Table 9 - Supply-Demand by Major Occupation (2023 &2028)

Occupation	Supply-Demand				
	MSW 2018	*Surrey % Share*	Surrey 2018	Surrey 2023	Surrey 2028
Management	2,007	*14.7%*	296	800	673
Business, finance & administration	2,833	*16.2%*	458	1,180	1,000
Natural & applied sciences	956	*13.1%*	125	443	378
Health	1,104	*18.5%*	204	560	473
Education, law & social, community & government	2,054	*14.7%*	301	740	608
Art, culture, recreation & sport	825	*9.1%*	75	197	167
Sales & service	5,076	*18.8%*	953	2,118	1,783
Trades, transport & equipment operators	2,288	*25.1%*	573	1,627	1,411
Natural resources, agriculture & related	239	*19.9%*	48	141	120
Manufacturing & utilities	575	*28.5%*	164	455	372
Total Supply-Demand	**17,958**	***17.8%***	**3,196**	**8,261**	**6,984**
Annual Average	*17,958*	*17.8%*	*3,196*	*1,652*	*698*

BC Labour Market Outlook 2018; Census 2016

Results show that a surplus of workers is projected over the next 10 years which immediately begins to trend downwards after 2018, almost to the point where total supply and demand approach equilibrium in 2028. Although gaps do not emerge at the major occupational level over this period, individual occupational gaps (4-digit National Occupational Classification) already exist and will become more acute each year. BC's high-tech industry, for example, is expected to continue to grow with occupations such as computer system designers projected to be one of the fastest growing through 2028. Key Surrey industries containing several in-demand occupations, such as professional, scientific & technical; manufacturing; and trades & transportation will be challenged meeting future requirements, owing to both employment growth and the impact of new technology on skill sets.

Job Openings by Skill Level

The BC Labour Market Outlook provides projected job openings by skill level defined as the education and training requirements typically needed to perform the job. Occupations have been organized into to five skill level categories from among jobs that require no formal education or training to those that require a combination of post-secondary education and experience. BCLMO projections by skill level are provided for BC only with estimates developed for Surrey based on their equivalent share of total openings over the next 10 years. Estimates by skill level are then analyzed in relation to the BC education system's capacity to graduate students with the education and training needed to meet future skill requirements.

Table 10 details the requirements of each skill level and the projected number of job openings each year in Surrey through 2028. About two-thirds of all job openings will require some level of post-secondary education or training, while the remaining one-third will require a high school certificate or less. Skill requirements in the future economy continue to become more complex for most in-demand occupations.

Table 10 – Total Job Openings by Skill Level (2028)

Skill Level (Credential)	Total Job Openings			
	BC 2028	*Surrey % Share*	Surrey 2028	Surrey (Annual)
O (Post-Secondary Education + Experience - Management)	124,352	*13.8%*	14,175	1,417
A (Post-Secondary Degree)	180,548	*20.0%*	20,581	2,058
B (Post-Secondary Diploma/Certificate)	286,613	*31.7%*	32,671	3,267
C (High School Certificate)	228,435	*25.3%*	26,039	2,604
D (Less than High School)	83,059	*9.2%*	9,468	947
Totals	**903,008**	***100%***	**102,934**	**10,293**

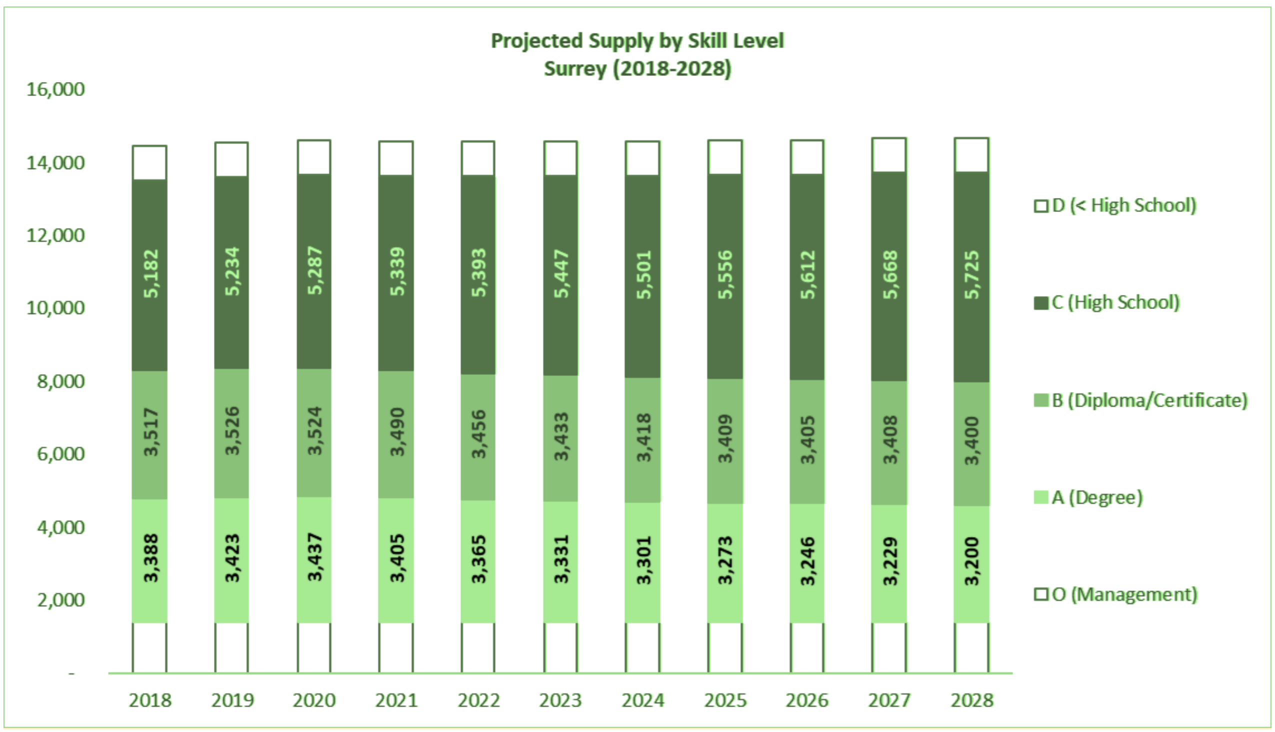
BC Labour Market Outlook 2018; Statistics Canada, Census 2016

As a means to determining whether BC's education system has the capacity to help meet future skill requirements, the following examines graduation rates of both the post-secondary and K-12 education systems in BC. BC's Post-Secondary Supply Model provides projections of the new supply of skilled labour for all age groups that will exit BC's public post-secondary education system with a credential between 2017/18 and 2026/27. Graduate estimates for Surrey are based on the City's share of the provincial population (11.1%) as of 2016. The BC Ministry of Education provides graduation rates (Grade 12) for all school districts as of 2015, with estimates developed through 2028. High school graduation rates are difficult to estimate due to the myriad factors that influence such outcomes. In this case, estimates are conservatively based on an average growth of 1.0% through 2028 – roughly equivalent to the projected growth rate for the Surrey population aged 0-19 years.

The projected supply of high school and post-secondary graduates in Surrey by skill level is depicted in Figure 16. Estimates have not been developed for skill levels that require less than high school and those that require a combination of education and experience (i.e., management). In its place are the projected job openings as developed using the BCLMO data set per Table 10.

As shown in Figure 16, BC's education system has the *notional* capacity to graduate students to meet future requirements for skill levels A (Degree), B (Diploma/Certificate) and C (High School). Relative to projected job openings in Surrey (Table 10), annual graduates in skill levels A and C far exceed the number of job openings, while graduates in skill level B are closely aligned. This would suggest that greater programming resources may be needed in support of skill level B. In addition, there are no guarantees that graduates from any BC education or post-secondary institution will choose to work in the City of Surrey. Competition for skilled graduates will continue to intensify over time, while the challenge for Surrey employers will be to attract and recruit graduates for their growing industries.

Figure 16 – Projected Supply of Secondary and Post-Secondary Graduates by Skill Level
Surrey (2018 – 2028)



BC Post-Secondary Supply Model (2017), BC Ministry of Advanced Education, Skills & Training and BC Stats; and Grade 12 Graduation Rates (2015), BC Ministry of Education

Literature Review

Key Literature Sources

The literature review centred on the labour market needs of the Surrey economy, including qualitative labour demand, labour supply and demand/supply gaps, trends, issues, public policy implications, etc. that will be useful for SBOT, employers, labour force participants, government, service providers and other stakeholders.

Figure 17 - Key Labour Market & Human Resource Themes

This section provides a synthesis of a review of findings from 37 reports and publications and more than 90 websites scanned during the project's secondary research phase. The literature review reflects largely narrative information derived from published and unpublished reports, websites and other sources. Qualitative information is supplemented and supported by the quantitative data captured in the Labour Market and Related Data Analysis section of this report.

As the previous graphic highlights, several labour market and human resource themes emerged during the course of the review including:

- Use of labour market information – Reports from a number of sources suggested that ready access to current, relevant labour market information is critical to the success of effective workforce strategies. Access to disaggregated data was seen as important for developing local strategies.
- Attraction – Reports indicate that workforce attraction is a challenge across virtually all sectors and industries. Shortfalls will occur in all occupations to varying degrees due to a combination of attrition and growth. The critical importance of immigrant talent and other sources of labour e.g. youth, Indigenous workers and other underrepresented groups was cited in several documents.
- Recruitment – This will become increasingly challenging as skilled workers have more choices and expanded options for employment. Employers must recognize and plan if they are to succeed in this changing environment.
- Onboarding – A few reports touched specifically on onboarding challenges. Some made specific reference to creating a welcoming, inclusive work environment that effectively engages new hires.
- Education and training – The importance of training and education was highlighted in several publications. There is a direct correlation between employability and level of education in several industries.
- Cross-cultural engagement – This was a strong theme in many of the documents reviewed by the study team. Employers recognize the need to engage new arrivals but many lack awareness of the process and available resources.
- Retention – A number of publications made reference to retention strategies – especially when dealing with younger workers.
- Labour force-specific strategies – Some documents described sector- or industry-specific labour force strategies. Many of the themes above were woven through those strategies.

Reports, publications and website information sources varied considerably in their scope, focus and content. Resources ranged from single-page fact sheets to extensive research studies. Some were rooted in statistics and hard data while others were loosely structured and less precise. The review centred mostly on current or recent documents and a very limited number of documents older than four or five years.

The study team scanned for information related to the following six specific areas of focus:

1. Identification and quantification of skills gaps (current and projected) by industry;
2. Identification of key growth industries and potential HR challenges/barriers;
3. Identification of labour sources including youth, underrepresented groups, secondary and post-secondary graduates and migrants (provincial, national, international);
4. Identification of education and training gaps;
5. Identification of impacts of technology on workforce productivity and employment; and,
6. Identification of demographic trends impacting recruitment, development and retention.

The areas of focus are described in more detail below, followed by brief reviews of several of the more significant source documents and web-based resources. The review also yielded a number of *emerging*, *promising* and *best* practices which are detailed later in this report. As much as possible, information was gleaned from the literature that was relevant to Surrey.

Focus Area 1 - Skills Gaps (Current and Projected) by Industry

The study team found evidence of a strong current and future demand at the provincial level for 'people skills' (i.e. active listening, verbal communication and reading comprehension, in addition to critical thinking skills). The demand remains strong for Science, Technology, Engineering and Mathematics (STEM) skills for particular occupations. With the projected growth of occupations in the City of Surrey's priority sectors (Health Technology, Clean Technology, Advanced Manufacturing, Agri-Innovation and the Creative Economy), it is reasonable to suggest that STEM skills will be in high demand locally.

Top skills and competencies for the future

WorkBC's *BC Labour Market Outlook 2018* suggests that the following skills and competencies will be in high demand over the coming decade across all industries:

1. Active listening is identified as a "very important" skill for 73 percent of total projected job openings in B.C.
2. Speaking is "very important" for 65 percent of job openings.
3. Reading comprehension is "very important" for 56 percent of job openings.
4. Critical thinking is "very important" for 55 percent of job openings.
5. Social perceptiveness and judgement and decision making are identified as "very important" for almost 40 percent of job openings.

At the local level, the *Surrey Advanced Manufacturing and Innovation Economy (AMIE*) study completed in March 2018 suggests that Surrey manufacturers should develop short term training programs to increase the supply and capabilities of production line workers for Surrey manufacturers. The report also suggests that educational institutions should promote on-the-job training and upskilling of existing workers through greater use of the (former) Canada Job Grant program and partner with local manufacturers to develop and undertake short training programs for operations and senior management personnel to equip them with 'Industry 4.0' skills and capabilities to enable Surrey manufacturers to survive and grow in the face of world-wide competition.

Focus Area 2 - Key Growth Industries and Potential HR Challenges/Barriers

The City of Surrey's *Economic Diversification Strategy* (2016) identifies five priority sectors - Health Technology, Clean Technology, Advanced Manufacturing, Agri-Innovation and the Creative Economy. To date, labour market research has been limited to the Advanced Manufacturing sector. That nearly 24,000 of Surrey's labour force work in advanced manufacturing; and the manufacturing sector is incredibly important in providing the city's population with well-paid jobs.

The AMIE labour market development strategy action plan makes several recommendations to address anticipated HR challenges including:

1. Increase use of co-ops and interns to provide Surrey manufacturers access to skills at a reduced cost.
2. Conduct a feasibility study of a Centre of Excellence (COE) for Advanced Manufacturing in Surrey.
3. Increase the current supply of trades apprentices from KPU to address the current shortages of trades personnel experienced by Surrey manufacturers.
4. Surrey Economic Development should undertake an aggressive campaign to attract manufacturers, particularly large manufacturers, to create an advanced manufacturing cluster in Surrey.
5. Surrey Economic Development and Surrey Board of Trade should promote on-the-job training and upskilling of existing workers through greater use of the Canada Job Grant program.
6. Surrey Economic Development and SFU/KPU should increase promotion of the following federal government programs to increase the degree of collaboration between universities and Surrey manufacturers to accelerate adoption of Industry 4.0 practices.
7. Ensure that technician, technologist and engineering programs are appropriate for Surrey manufacturers and include training regarding basic and advanced Industry 4.0 equipment, systems and processes.
8. The City of Surrey in conjunction with industry, SFU and KPU should design and implement a program to interest local high school students in a career in manufacturing.
9. The City of Surrey should increase the competitiveness of Surrey as a location for advanced manufacturing.

The city plays an important part in the designation/supply of employment lands; ensuring that there is a supply of housing for workers in Surrey; and, working with TransLink and the Province of BC to ensure that an efficient public transportation network is in place.

The largest industries in the broader Mainland Southwest Region, in terms of employment size, are: Wholesale and Retail Trade, Health Care and Social Assistance, and Professional, Scientific and Technical Services. Computer Systems Design and Related Services is anticipated to be one of the fastest growing industries over the next ten years, an indicator of BC's advances in technology-based employment and attraction of tech companies. The residential construction sector is a significant employer in Surrey and attraction strategies like the Homebuilders Association of Vancouver's (HAVAN) initiative at two secondary schools has shown promise in drawing increased numbers of young workers to the construction trades.

Table 11 (below) highlights the industries with the greatest number of projected job openings and their respective growth expressed as a percentage. The Labour Market Analysis section will translate this into Surrey-specific numbers later in this report.

Table 11 – Job Openings and Growth Projections 2018 to 2028

Industry	Job Openings 2018-2028	Employment Growth (Annual %)
Other Retail Trade (excluding cars and personal care)	36,890	0.5%
Construction	36,500	0.3%
Legal, accounting, design, research and advertising svc.	31,040	2.0%
Food services and drinking places	30,540	1.7%
Ambulatory health care services	29,730	2.3%
Management of companies and enterprises and administrative and support	28,040	1.1%
Computer systems design and related services	24,810	3.4%
Wholesale trade	23,820	0.9%
Hospitals	22,190	1.2%
Repair, personal and non-profit service	21,160	0.8%

Source: BC Labour Market Outlook 2018. WorkBC.

Focus Area 3 - Labour Sources

In the Mainland/Southwest Region, of which Surrey is a key component (18% of employment in 2016), a total of 588,470 job openings are anticipated over the next 10 years. Two-thirds of the openings will be created by the need to replace exiting workers while the balance will be the result of anticipated economic growth. Job opening projections for the Mainland/Southwest represent 65% of the provincial total.

Employment demand in the region is expected to increase 1.2% each year, which is faster pace than the provincial average of 1.1% and the second fastest growth rate of all economic regions. Mainland/ Southwest comprises two-thirds of BC's forecasted job openings to 2028.

Figure 18 (next page) illustrates the magnitude or size of some key labour force groups in Surrey that employers and this workforce strategy should consider, as well as drawing on talent pools outside of Surrey.

Figure 18 - Surrey Populations and Talent Pools

Total Population (2016)	511,540
Total labour force	274,690
Female labour force	129,320
Immigrant labour force	220,155
Visible minority population	299,245
Working age (15-64) persons with disabilities	48,272
Seniors (65-84)	72,990
Unemployed Youth (15-24)	5,000
Indigenous people	13,460
K-12 graduates	TBD
Post-secondary graduates	TBD

Census 2016

Immigrants represent a growing pool of skilled talent. The importance of this source of labour is critical. The study team reviewed several documents that describe specific strategies to maximize the potential of this key source of labour. Some suggestions include:

1. Build the business case for inclusion of skilled immigrants
2. Recognize the return on investing in immigrant talent
3. Uncover and eliminate biases
4. Take steps to successfully integrate global talent

Focus Area 4 - Education and Training Gaps

The literature review did not result in significant detailed information or data regarding skills gaps. A 2018 G20 report from the Council of Ministers of Education of Canada reported that:

> "Both the (G20) Education Declaration and the Joint Education and Employment Declarations reaffirm the unique role of education as a key driver of fair and sustainable development and acknowledge the need to place education at the centre of the global agenda. Ministers stressed the transformative power, positive results, and broad influence of education. They also noted that education is an essential tool with which to address global challenges and contribute to dialogue, consensus, cooperation, and collaboration."

Anecdotal information from a small number of sources indicates that professional, technical and skilled trades occupations rely more heavily than other occupations on external programs for workforce training. Provincially, approximately three-quarters of all job openings will require post- secondary education.

Reports suggest that a significant number of employers deliver in-house training and on-the-job training or other internal training to address skills gaps. Internal training opportunities offered by employers typically include:

- *General on-the-job training (e.g., store management training);*
- *On-the-job professional development opportunities (e.g., Lunch N Learns);*
- *Web-based and external training during work hours (e.g., webinars, seminars);*
- *Subsidized learning opportunities (e.g., university programs); and*
- *Specific technical training for general or specific occupations (e.g., accounting courses, computer courses).*

Required skill levels are listed below for a selection of occupations with some Mainland/Southwest Region examples and corresponding job openings for 2018-2028 (in brackets):

Skill Level 0: Usually requires a combination of education and experience
- *Retail and wholesale trade managers (12,250)*
- *Restaurant and food service managers (4,920)*

Skill Level A: Usually requires a Bachelor's, Graduate or First Professional Degree
- *Registered nurses and registered psychiatric nurses (11,730)*
- *Financial auditors and accountants (8,420)*

Skill Level B: Usually requires diploma, certificate or apprenticeship training
- *Administrative officers (10,550)*
- *Cooks (7,050)*

Skill Level C: Usually requires secondary school and/or occupation-specific training
- *Retail salespersons (15,040)*
- *Nurse aides, orderlies and patient service associates (11,060)*

Skill Level D: Usually requires on-the-job training
- *Food counter attendants, kitchen helpers and related support occupations (9,470)*
- *Janitors, caretakers and building superintendents (7,950)*

Focus Area 5 - Impacts of Technology on Workforce Productivity and Employment

The study team found that technology, including robotics, artificial intelligence, and automation are re-shaping demand for skills and competencies. Approximately 36% of occupations in BC have a high chance of being affected by automation. That represents 166,000 job openings to 2028.

Impacts are likely to be felt mostly in low-skilled occupations and occupations that require a university degree are much less likely to be affected. Research is ongoing and has proved to be somewhat mixed (job loss vs. job gain), but most studies show that the likelihood of being automated varies across occupations.

Researchers point to certain "bottlenecks to automation" because some skills and competencies are hard to automate including cultural sensitivity, complex relationships, caring for others, etc. Similarly, creativity and complex reasoning, perception and manipulation are also challenging to automate.

A significant number of occupations that have a high chance of automation are currently experiencing labour shortages in BC.

The ability of workers to adapt to changes in technology is critical. The following list of occupations, all of which are currently experiencing difficulty in filling, are subject to automation:

- Retail salespersons
- Food counter attendants & kitchen helpers
- Accounting technicians and bookkeepers
- Administrative officers
- General office support workers
- Drivers
- Cooks
- Accounting and related clerks
- Administrative assistants
- Food and beverage servers
- Receptionists
- Cashiers
- Carpenters
- Shippers and receivers
- Heavy equipment operators
- Welders

According to the AMIE study, the Surrey advanced manufacturing workforce will need to be skilled in the following key technologies for Industry 4.0:

- Connectivity, big data, artificial intelligence (AI) Cloud
- Sensors and embedded software
- Advanced data analytics using algorithm and pattering techniques
- Mobile wearables
- Augmented/virtual reality
- Additive manufacturing
- Drones and robotics
- Social media
- Integrated manufacturing technology skills
- Advanced process skills

Focus Area 6 - Demographic Trends Impacting Recruitment, Development and Retention

The literature review found that some jurisdictions in BC – particularly smaller centres and rural and remote communities - face challenges in terms of recruitment, development and retention of workers. Larger urban areas like Vancouver focus their efforts primarily on attracting *business* rather than focusing on attracting *workers* per se. Cities like Prince George and Kamloops have taken steps to attract workers with targeted recruitment and attraction strategies. Employers and educators in those locations (and many others) understand the lifestyle and cost of living benefits offered by their respective regions but workers living outside the region do not necessarily think about such factors when considering relocating for work.

Venture Kamloops, for example, suggests that "recruitment/attraction strategies should include the benefits of the living and working in the region, but should also focus on competitive compensation packages (including benefits packages), employment flexibility (e.g., off-site employment, extended leaves), employee benefits (e.g., employee pricing, gym memberships, child care services), and other approaches to bring employment candidates and their families into the region (e.g., support for finding spousal employment opportunities)."

It is uncertain how this type of strategy would benefit employers in Surrey because the demographic profile of the city is vastly different. The population of Surrey is growing – particularly with the influx of newcomers to Canada – it grew by 11% between 2011 and 2016. The immigrant population in Surrey stands at 43% and is steadily increasing. More than 60% of the population is between 20 and 64 years of age. Transportation infrastructure is strong and 15% of workers regularly use public transit. The workforce is well-educated. More than half have completed either college or university.

The *BC Labour Market Outlook 2018* report offers an assessment of demographic trends and data including the age structure of the population and labour force, occupational unemployment rates, the labour force participation and occupations of recent immigrants, and typical education requirements of occupations.

The Outlook reports that:

> "…one of the factors that allowed the recent growth in employment was a surge of migration from other provinces. This peaked in 2016 and has started to decline because improved economic conditions in the rest of the country means that there are more jobs in many provinces and territories. A strong surge of immigration from outside of Canada has helped to offset this, resulting in total in-migration to B.C. reaching 60,000 in 2017—the highest since 2008 when in-migration reached 62,000 people."

Population growth is directly linked to employment growth. It is expected that the gap between births and deaths will grow, leading to a lower rate of natural population growth. Millennials are moving into their 30's. 'Gen Z' numbers are smaller, meaning that the number of workers in their 20s will continue to decline in the coming decade. Immigration alone will not offset the decline. Strategic approaches to training and skill development are needed to ensure that the economy is able to expand. Surrey and other communities in the Mainland/Southwest Region are not immune to these demographic changes but the area will continue to be a strong driver of employment.

Summary of Findings from Literature Review

The literature review reflects over 125 reports and websites scanned during the project's secondary research phase. Eight themes guided the scan and six areas of focus were used to capture relevant qualitative information. The results of the review supplement the quantitative statistical analysis of the workforce.

Skills gaps (current and projected) by industry

- People skills will be in demand i.e. active listening, speaking, reading comprehension, critical thinking, and social perceptiveness
- Certain occupations – notably technical and advanced manufacturing - will benefit from STEM skills
- Sort term training to address skills gaps is suggested as a solution
- Creative use of available funding should be used to support skills gap training initiatives

Key growth industries and potential HR challenges/barriers

- Surrey has identified five priority sectors - Health Technology, Clean Technology, Advanced Manufacturing, Agri-Innovation and the Creative Economy
- Advanced manufacturing has received significant focus resulting in several recommendations for labour market strategies to address challenges facing the sector
- Largest industries in Surrey are Wholesale and Retail Trade, Health Care and Social Assistance, and Professional, Scientific and Technical Services.
- Greatest number of projected job openings are in Retail Trade
- Highest employment growth by percentage is 3.4% in computer systems design and related services

Labour sources including youth, underrepresented groups, secondary and post-secondary graduates and migrants (provincial, national, international)

- Close to 600,000 job openings are anticipated for the Mainland/Southwest Region by 2028
- Employment demand will increase by 1.2% annually
- Immigrants represent a significant pool of skilled workers

Education and training gaps

- Literature did not provide significant detailed information regarding skills or training gaps
- Projections indicate that 75% of jobs will require post-secondary training by 2028
- Surrey's workforce post-secondary education level currently stands at 50%

Impacts of technology on workforce productivity and employment

- Approximately 36% of occupations in BC have a high chance of being affected by automation. That represents 166,000 job openings to 2028.
- A significant number of occupations that have a high chance of automation are currently experiencing labour shortages in BC.
- According to the AMIE study, the Surrey advanced manufacturing workforce will need to be skilled at the following key technologies for Industry 4.0:
    - Connectivity, big data, artificial intelligence (AI) Cloud
    - Sensors and embedded software
    - Advanced data analytics using algorithm and pattering techniques
    - Mobile wearables
    - Augmented/virtual reality
    - Additive manufacturing
    - Drones and robotics
    - Social media
    - Integrated manufacturing technology skills
    - Advanced process skills

Demographic trends impacting recruitment, development and retention

- Population growth is directly linked to employment growth.
- It is expected that the gap between births and deaths will grow, leading to a lower rate of natural population growth.
- Millennials are moving into their 30's.
- GenZ numbers are smaller, meaning that the number of workers in their 20's will continue to decline in the coming decade.
- Immigration alone will not offset the decline.
- Strategic approaches to training and skill development are needed to ensure that the economy is able to expand.
- Surrey and other communities in the Mainland/Southwest Region are not immune to these demographic changes but the area will continue to be a strong driver of employment.

Promising Practices Scan

The study team makes the distinction among three types of practices in the context of this report so that SBOT and its stakeholders are aware of the inherent limitations of literature reviews. It is a reasonable precept that the sharing of labour market strategies and solutions is critical to building on past successes and preventing the problem of 'reinventing the wheel'. It should be acknowledged, however, that there are very few 'universally' proven regional/local labour market strategies and solutions. However, armed with information – and when viewed through the appropriate lens – Surrey can learn from other jurisdictions and organizations to adapt initiatives to the local context.

Defining what constitutes emerging, promising and best practices must be rooted in evidence. In brief, a **best practice** is defined as a method, strategy or technique that has proved to be effective consistently replicated across a number of cases or examples – often under scientific conditions and independent review. Generalization is another concept related to best practice (e.g. a labour market strategy that works in the BC Interior may not be expected to work in Surrey). A strategy for labour market attachment for Indigenous people might not work for new immigrants, regardless of being considered best practice in the Indigenous context.

Promising practices ideally are supported by evidence that the practice is proven to be effective at achieving a specified goal or outcome. They are similar to best practices but lack evidence of being generalizable across different contexts. Despite the lack of sound evidence, organizations may choose to adapt these practices because of the 'promise' they hold.

A third level is aptly described as **'emerging practice'**. These are characterized as new and innovative but not necessarily backed by sufficient research or testing or scientific rigour. Still, information about this type of strategy or intervention is important because it sheds light on practices that are worthy of further research.

The study team reviewed a number of reports that claim to reflect or imply best practices. There is variation in the evidence cited, however, to back up these assertions. We suspect that some organizations or reports may use the terms 'best practice' and 'promising practice' interchangeably in the absence of any supporting evidence. Despite the choice of descriptor, the bulk of the ten examples presented in this section, therefore should be considered 'promising' or 'emerging' – and not necessarily 'best'.

Example #1 – Promising Practices from Venture Kamloops – Workforce Strategy (2015)

As a key element of its 2017 Labour Attraction Partnership Report, Venture Kamloops developed five sector-specific strategies to share with employers in the area. Each is structured in a consistent format that includes recommendations on talent attraction and retention, information on the projected growth by occupation in the sector, and information on quality of life factors that make Kamloops a desirable place to live. The intention of these strategies is to provide a resource to employers to support their talent attraction and recruitment efforts. Four general strategies, applicable across all sectors, include:

- Increase Awareness of the Opportunities and Quality of Life in Kamloops
- Develop Sector Partnerships to Cooperatively Attract Talent to Kamloops
- Create a Spousal Employment Support Program
- Deepen Partnerships with Thompson Rivers University

Example #2 – Promising Practices from Workforce Planning Ontario (2019)

- Close to 30 Workforce Planning Boards across the province gather intelligence about the supply of labour and the demand side of the local labour market by working with employers to identify and meet their current and emerging skills needs. The primary role of Workforce Planning Boards is to help improve understanding of and coordinate community responses to labour market issues and needs.

- These boards conduct localized research and actively engage organizations and community partners in local labour market projects. Each board is as individual as the community it serves, and each addresses labour market issues in its own way as all communities have their own priorities (i.e. not a 'cookie-cutter' approach). As a network, Ontario's workforce planning boards also work together to address labour market issues from a province-wide perspective.

Example #3 – Promising Practices from Quebec National Workforce Strategy 2018-2023

- To ensure that Quebec has a sufficient number of human resources with skills that meet the ever-changing needs of the labour market, the National Workforce Strategy sets out concrete government actions in collaboration with stakeholders and labour market partners.
- Designated by the OECD and other organizations concerned with the proper functioning of the labour market, these actions are inspired by the best practices in workforce training and development. In particular, they will make it easier for Quebec businesses to find the workforce they need while adapting to the full employment situation, and for workers to thrive in the labour market throughout their career.
- Taking into account the recommendations made by the OECD and other organizations, the Quebec government intends to achieve its labour market development objectives efficiently and by making the most of its investments. To achieve this, the National Workforce Strategy includes actions grouped under four main guidelines:

1. Know and disseminate current and future workforce needs.
    - Produce fair information on the labour market
    - Effectively disseminate information on labour market and training
    - Implement innovative projects e.g. the Continuum Enterprise Project
2. Have enough workers.
    - Improve the employment integration of immigrants
    - Promote employment integration of the greatest number of workers possible
    - Support and Guide Employers in their Adaptation to Labour Market Transformations
    - Support training in strategic areas
    - Facilitate the Geographic Mobility of the Workforce
3. Improve flexibility and agility in skills development.
    - Better Adapt Training to the Needs of Workplaces and Regions
    - Better Prepare for Integration, Maintenance and Advancement in the Labour Market
        - Increase Productivity in the Labour Market Through Ongoing Training

4. Adapt workplaces.
    - Adapt Workplaces to New Ways of Organizing Work
    - Promote the Quality of Life at Work

Example #4 - Forum of Labour Market Ministers - Toolkit of Promising Practices (2014)

This toolkit was envisioned by the education and provincial-territorial labour market Ministers at the Skills for the Future Symposium in July 2014, held in a response to a request from premiers through the Council of the Federation. The toolkit is an opportunity for sharing promising practices amongst provinces and territories and with the many stakeholders leading and supporting our education, training and employment programs.

Best practices from education, postsecondary and labour market perspectives within provinces and territories are profiled in this toolkit. The practices are organized into four themes, based on the objectives they seek to accomplish. The themes represent the key areas where provinces and territories have focused some of their efforts to help ensure alignment of education and training systems with labour market needs.

These four themes reflect the biggest challenges and opportunities for provinces and territories:

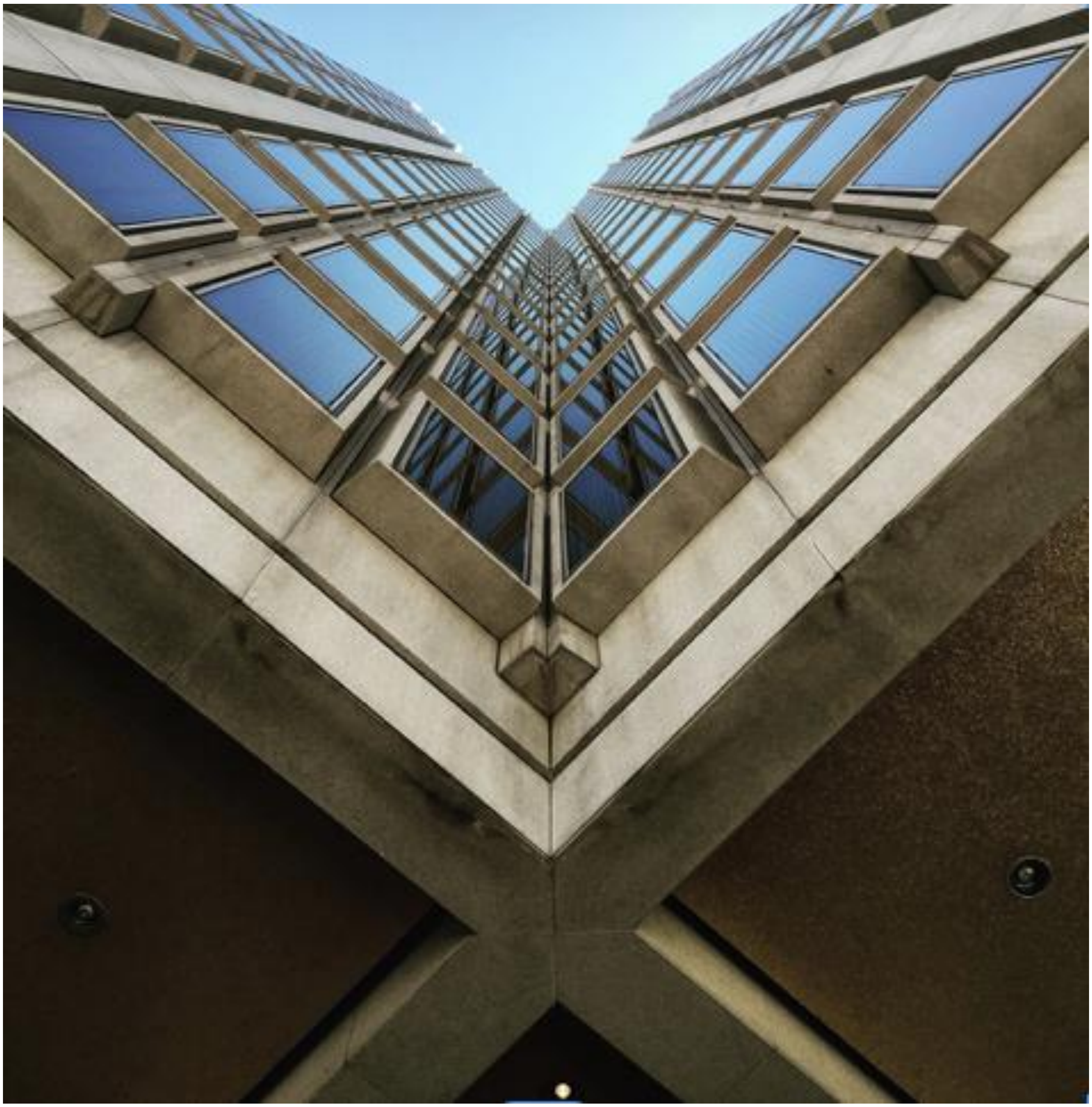
1. Upgrading the Skills of Canadians: supporting individuals at all skill levels in upgrading their skills to remain competitive in their current field of employment or obtain more rewarding employment in a new field.
2. Aligning Secondary School Programming to Labour Market Demands: supporting high school students and their parents and teachers to assess their interest and skills, explore potential career options and pursue training or education that will ensure students can realize their full potential within the Canadian labour market.
3. Aligning Postsecondary Education Programming to Labour Market Demand: supporting postsecondary students in obtaining the specific knowledge, skills and work-related experience required by employers so they can quickly transition into their desired field of employment after graduation.
4. Supporting the Labour Market Attachment of Target Populations: supporting populations that experience challenges in obtaining or maintaining employment, by providing targeted programming that meets individuals' needs and the needs of the labour market.

Example #5 – Promising Practices from Alberta's 10 Year Labour Market Strategy

The province of Alberta's 10 Year Labour Market Strategy articulates four key themes and corresponding goals. These themes echo some of the key concepts identified in other jurisdictions and are adaptable to the local level.

1. Inform - Albertans and stakeholders have increased access to current, accurate and relevant education, career, workplace and labour market information needed to make informed career, workplace, and labour market decisions.

2. Attract - Alberta attracts the interprovincial migrants, immigrants and temporary foreign workers necessary to address labour force needs.
3. Develop A High-Performance Workforce - Albertans gain improved access to the education and training needed to address short-term labour market demands and build long-term capacity to respond to future opportunities and challenges.
4. Retain - Enhanced community and work attractiveness leads to more workers remaining engaged in Alberta's labour force.



Example #6 – Promising Practices from the City of Prince George (2019)

Prince George created its 'Move up Prince George' initiative to promote the city as a great place to live, work and do business. The city designed a robust website that acts as a portal to information on local demographics, industries and employers, labour market information and growth potential, employment opportunities and service providers, neighbourhoods, real estate, immigrant talent and more.

The city's 2017-2019 Economic Development Strategy focuses on four missions:

1. Facilitate current Business Retention and Expansion
2. Attract business to expand and diversify the economy
3. Grow the workforce by retaining and attracting residents
4. Market Prince George to facilitate retention and attraction of business and population

Short term goals and metrics are designed to focus on measurable, achievable actions.

Example #7 – Promising Practices from Mississauga's 10-year Economic Development Strategy

Mississauga, Ontario, like Surrey, is a large, fast-growing urban centre adjacent to a major city. The City's Economic Development Strategy builds upon the City of Mississauga's Strategic Plan as the premise for the development of goals, objectives, actions and initiatives that will support the City's commitment to growth and prosperity.

One of the key principles of the City's Strategic Plan is that Mississauga is a city that values a strong global business future, fostering a prosperous and sustainable economy that attracts and grows talent.

The City has developed an excellent web portal that connects users with up-to-date labour market information and details about local development opportunities and key sectors, along with links to a variety of resources.

The City of Mississauga's recent economic development history has been one of great success. Since its creation in 1974, the City has grown to become an example of positive economic growth and cultural diversity and is a major contributor to growing and emerging key sectors that include; life sciences, information communications and technologies (ICT), Advanced Manufacturing and Financial Services. These sectors will continue to be a major focus for the City's economic development and will be significant in achieving its goals and objectives.

Example #8 – Promising Practices from Spokane Workforce Council

The Spokane, Washington Workforce Council's initiatives have gained a reputation as models of promising practice. The study team contacted CEO Mark Mattke to explore some of the activities the organization has undertaken to improve workforce attraction, recruitment and retention.

A notable highlight is the Spokane Resource Center – a new concept that co-locates a mix of employment and social services in a one-stop shop that offers more than 20 employment programs and a variety of housing and other social service supports for workers and their families.

The new centre builds on the past success of Spokane Workforce Council's programming by focusing on three principal areas:

- On the workforce demand side, ensuring that Spokane's employers' needs drive programs and services.
- Supporting early attachment to the workforce by offering access to basic credentials and certification.
- Providing supports for 'stabilized living' through housing, transportation, healthcare and lifelong learning opportunities.

Example #9 – Promising Practices from the Economic Strategy for Calgary, Alberta

The four areas of focus in Calgary's strategy – Talent, Innovation, Place and Business Environment are described as "deeply inter-connected". Place-building and being a dynamic, vibrant city are viewed as mutually reinforcing elements for attracting and retaining talent. Calgary plays on its reputation as "livable and affordable, with a quality of life that can attract and retain the millennial talent imperative to the city's economic future". Creating a business-friendly environment (taxation, ease of municipal permitting, etc.) are seen as crucial to attracting investment, as well as retaining and encouraging successful local companies. The strategy maintains that alliances and partnerships with industry, government, other organizations, advanced education and community are keys to future success.

Calgary has acknowledged that technology is increasingly infiltrating every sector and support for technological change across all industries is necessary in to improve competitiveness and productivity. A 2018 study - *Mapping Calgary's Digital Future: Tech Employment Opportunities for Displaced Workers* was undertaken by the Information and Communications Technology Council (ICTC) and Calgary Economic Development. The study reports that in 2015, Statistics Canada estimated that the province lost nearly 20,000 jobs in the energy sector. Calgary, which represents 30% of Alberta's population, 29% of its businesses, and 31% of total employment, was strongly impacted by the downturn.

A significant number of displaced workers were well-educated and highly skilled. Some of the highest rates of displacement were experienced among petroleum engineers and geoscientists. The study suggests that technology is currently impacting all sectors of the economy in new and increasing ways and he potential transition of these displaced workers into digital occupations across Calgary, will prove beneficial for both job seekers and businesses.

The report is seen a first step in connecting job seekers who are transitioning into high-demand digital occupations, with tech employers who are "suffering from a shortage of the skilled talent essential to grow their business in Calgary." ICTC and the Calgary Economic Development will be launching an online platform for job seekers and employers in 2019. The report characterizes this promising practice as follows:

> *"This platform will provide displaced job seekers not only with detailed knowledge of skills for in-demand jobs, but also with educational resources available for upskilling. This platform will also act as a resource for tech employers to gain insight into the skills that these displaced job seekers already possess. Making these connections and understanding these nuances is key to unlocking opportunities for meaningful employment in the city, and for spurring business growth as a whole."*

Example #10 – Promising Practices from the State of Oregon

Future Ready Oregon provides skill and job training to students and adults, helping to close the gap between the skills that Oregon's workers have and the skills that Oregon's growing businesses need.

The plan includes strategies to prepare the state's future workforce by making a $300 million investment in education that emphasizes hands-on learning. In addition, the state supports its current workforce by arming them with the skills they need to help Oregon's economy grow. Key activities include:

- Next-Gen Apprenticeships
  - Expand registered apprenticeship opportunities to fields like IT, healthcare, advanced wood manufacturing, and high-tech manufacturing

- Turn wage earners into job creators (House Bill 4144)
  - Helps mid-career construction professionals start their own business, and provides incentive to attract and retain new, young talent into the workforce
  - For four types of construction licenses, directs the Construction Contractors Board and the Building Codes Division to waive all state fees and formal education requirements for aspiring entrepreneurs who have worked in the construction industry for more than eight years.
  - Opens up an existing fund at Business Oregon to these new small businesses, to help with up-front costs like insurance, bonding, and equipment; funds will only be available for businesses in rural Oregon who work on affordable, low-, and moderate-income housing
  - Directs the Higher Education Coordinating Commission to give grant funding to these new small businesses to recruit, hire, and retain Oregonians new to the construction workforce; funds directly target rural businesses working on specific types of projects.

- Increase affordable housing supply in rural Oregon
  - Regional Solutions to work with state agencies and partner with local communities, the business sector, and private developers to address the housing shortage for working families in Oregon

- Ensure investments by the state are felt equitably across Oregon
  - Business Oregon to focus on rural areas, communities of color, and Oregon's nine tribes
  - Higher Education Coordinating Commission and Business Oregon to increase collaboration to match high-growth industries with job training programs

- Ease entry to high growth industries
  - State agencies to align qualifications for entry-level healthcare, homecare, and community health jobs; workers will be able to train for several sectors of the industry at once.

SURREY BOARD OF TRADE
inclusive | innovative | independent

Critical Success Factors - Lessons Learned

As the study team continued its work on the labour market strategy, it was guided by the following principles:

1. Strategic goals – there has to be consensus on the goals of the strategy amongst the stakeholders, clients, and the project team
2. Priorities and scope - examination and prioritization of the strategy's individual goals - the purpose of this is to enable SBOT to identify what goals are actually crucial to the strategy and which ones perform a 'supporting' role
3. Metrics - decide on how the metrics for measuring the progress of the critical goals and how they would be monitored
4. Documentation and future planning - critical success factors are recorded and documented so they can be referred to in subsequent similar projects

The Critical Success Factors (CSF) and lessons learned listed here informed the Labour Market Strategy. CSFs are one of three elements that the study team incorporated in its labour market strategy, with the others being strategic goals strategic scope.

CSFs and lessons learned from promising practices scan:

- Reliable, timely, local labour market information is critical to developing labour market strategies
- Local working groups or planning boards representing a mix of stakeholders provide valuable guidance and input on local initiatives
- Targeted training initiatives should be accessible and based on local priorities and delivery models should consider a mix of institutional, corporate and individualized training
- Workforce supply issues will intensify and will require multi-faceted approaches including maximizing pools of talent such as skilled immigrants, youth, indigenous workers and underrepresented groups – supply shortages will affect economic growth
- Local initiatives for attraction, recruitment and retention should be considered as elements of the broader labour market strategy
- Local/regional strategies can be informed by provincial, national and international strategies
- Local strategies and initiatives should consider the global economy

Primary Research

This project has heard from almost 200 Surrey employers and stakeholders on workforce challenges and opportunities. Each individual voice contributed greatly to a current understanding of workforce dynamics in BC's fastest growing and about to be largest city.

Overall, the three pieces of primary research for this project (employer survey, key informant interviews and focus groups) were mutually reinforcing – bringing out, to varying degrees, similar challenges and solutions, but with more opportunities to delve or probe into topics during interviews and focus groups. Each primary research methodology also brought out some unique findings that were not as apparent in the other two pieces.

Employer Survey Findings

This section of the research report involved an online survey of employers in Surrey and is one part of the SBOT Surrey Labour Market Priorities Project. The intent of this project is to lead to the development and implementation of a Surrey Workforce Strategy. The survey was a key piece of research along with a secondary literature and data review, key informant interviews, focus groups and community forums.

This project is funded by the Government of Canada and the Province of British Columbia and is managed by the Ministry of Social Development and Poverty Reduction. The following summary encompasses high level results of the employer survey of Surrey employers conducted from April 30 through May 24, 2019.

The survey questionnaire, methodology and sample were developed and implemented by HCS in partnership with SBOT, the PEERs Inc. and select Surrey-based employers, (i.e. a sample of Steering Committee employers). SBOT provided the survey sample based on their membership list of more than 6,000 employer organizations operating in the city.

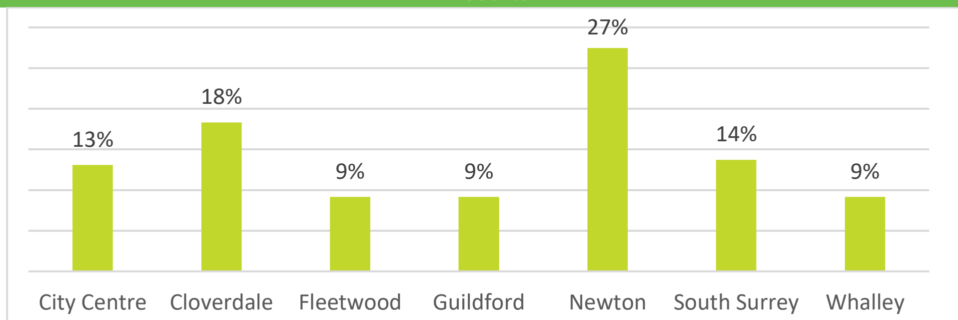
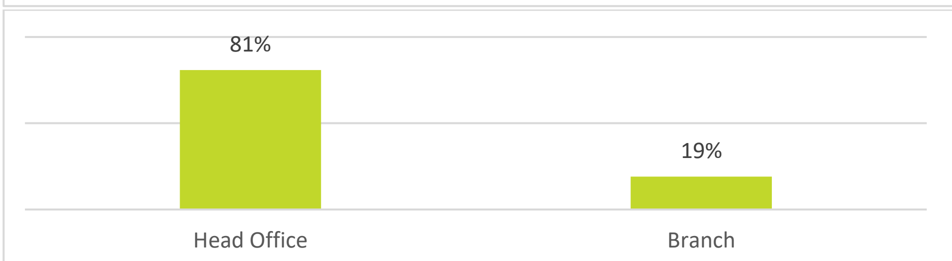
Respondent Statistics

A total of 115 employers ("respondents") completed the survey from a sample of 745 who viewed the questionnaire, of which 11 were identified as non-qualifiers. This represents a response rate of 15.7%. A small number of surveys were completed by employers outside of Surrey with operations within the city. It is estimated the Surrey economy contains more than 19,000 businesses (with employees) from across all industries.

Survey Response	
Viewed (Sample)	745
Started	254
Terminated (non-qualifiers)	11
Dropouts (after starting)	128
Completers ("Respondents")	*115*
Response Rate	115 / (745-11) = 15.7%
Sampling Error	9.1% (19 times out of 20)

Section 1 – Company Information (Q2 – Q5)

A total of 115 employers responded to the survey representing 153 total business establishments located throughout Surrey's seven town centres. More than 80% of respondents indicated that their head office is located in Surrey.

Question	Results
Location in Surrey (Establishments) (N=153, includes employers with multiple businesses across Surrey)	
Head Office or Branch (N=115)	
Other Branch Offices in Surrey (N=115)	

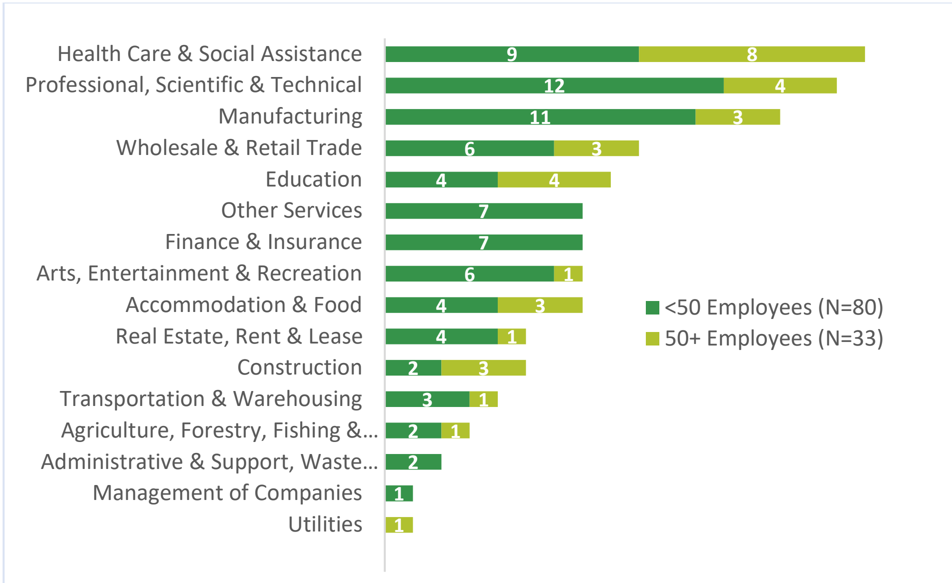
Industry Distribution

The distribution of responses is somewhat representative of the Surrey economy, with three of Surrey's larger industries accounting for 41% of responses, including health care & social services; professional, scientific & technical; and manufacturing. Despite best efforts, two important Surrey industries as measured by employment are underrepresented in the response, including construction and transportation & warehousing. In addition, three industries are not represented in the response, including mining and oil & gas; information & culture; and public administration.

In terms of employer size, 71% of responses were provided by employers with less than 50 employees (i.e. small employers), and 29% provided by those with more than 50 employees (i.e. large employers). Small employers are key drivers of employment growth in the Surrey economy.

Number of Employers by Industry & Size

(N=113



Establishment Distribution

The largest number of establishments (N=42) enumerated in the survey operate out of the town centre of Newton, followed by Cloverdale and South Surrey. The health care & social assistance industry contains the largest number of business establishments (N=30) surveyed, followed by education providers.

Industry	*Newton*	*Cloverdale*	*South Surrey*	*City Centre*	*Whalley*	*Guildford*	*Fleetwood*	Establishments per Industry (#)
Health Care & Social Assistance	10	5	3	4	3	1	4	30 (20%)
Education	6	3	3	4	1	1	1	19 (12%)
Professional, Scientific & Technical	7	1	1	4	1	2	1	17 (11%)
Manufacturing	7	2	1	-	3	1	-	14 (9%)
Wholesale & Retail Trade	2	3	2	-	3	2	1	13 (8%)
Real Estate, Rent & Lease	2	2	2	2	1	1	1	11 (7%)
Arts, Entertainment & Recreation	3	2	1	2	1	-	-	9 (6%)
Finance & Insurance	1	-	1	2	-	1	3	8 (5%)
Other Services	2	1	1	1	-	2	1	8 (5%)
Accommodation & Food	1	2	1	-	-	2	1	7 (5%)
Construction	-	2	3	-	-	-	1	6 (4%)
Transportation & Warehousing	-	2	-	1	-	1	-	4 (3%)
Agriculture, Forestry, Fishing & Hunting	1	2	-	-	-	-	-	3 (2%)
Administrative & Support, Waste Management	-	1	-	-	1	-	-	2 (1%)
Management of Companies	-	-	1	-	-	-	-	1 (1%)
Utilities	-	-	1	-	-	-	-	1 (1%)
Establishments Per Town Centre (#)	**42 (27%)**	**28 (18%)**	**21 (14%)**	**20 (13%)**	**14 (9%)**	**14 (9%)**	**14 (9%)**	**153**

Section 2 – Reported Workforce & Job Vacancies (Q6)

Understanding the expectations of employers in terms of future employment and occupational growth is central to this study. Employers were asked to quantify their current workforces by major occupation and to indicate whether they expect their workforce requirements to change over the next five years. They were also asked to identify occupations with job vacancies to gain an understanding of the labour market challenges employers might be facing now or in the future.

Workforce

As tabled below, the total number of employees as reported by survey participants was more than 20,000, or about 7% of the Surrey labour force in 2018. Those in education, law, social services and government jobs represented the majority of employees as reported by respondents. In large part this is attributed to the participation of the Surrey School District in the survey, accounting for about 62% of total current employees among all respondents.

In terms of future employment growth, 30% of employers expect occupational requirements to increase over the next five years, particularly in business, financial & administrative positions, as well sales & service jobs. Conversely, 70% of employers reported that their occupational requirements are expected to remain the same over the next five years, while, of note, no respondent expected their requirements to decrease during this period.

Major Occupation	Current Employees		Future Workforce			
	#	% of Total	*Increase*	%	*Same*	%
Management	1,271	6%	18	36.0%	32	64.0%
Bus., Fin. & Admin	1,943	10%	25	62.5%	15	37.5%
Nat. & Applied Science	389	2%	6	23.1%	20	76.9%
Health	497	2.5%	1	4.5%	21	95.5%
Educ., Law, Social & Govt	12,495	62%	4	14.3%	24	85.7%
Art, Culture & Rec.	42	0.2%	1	5.0%	19	95.0%
Sales & Service	1,465	7%	16	47.1%	18	52.9%
Trades, Transport & Equip.	1,451	7%	7	33.3%	14	66.7%
Natural Resources & Related	163	1%	2	10.0%	18	90.0%
Manufacturing & Utilities	615	3%	5	22.7%	17	77.3%
Totals	**20,031**	**100%**		**30%**		**70%**

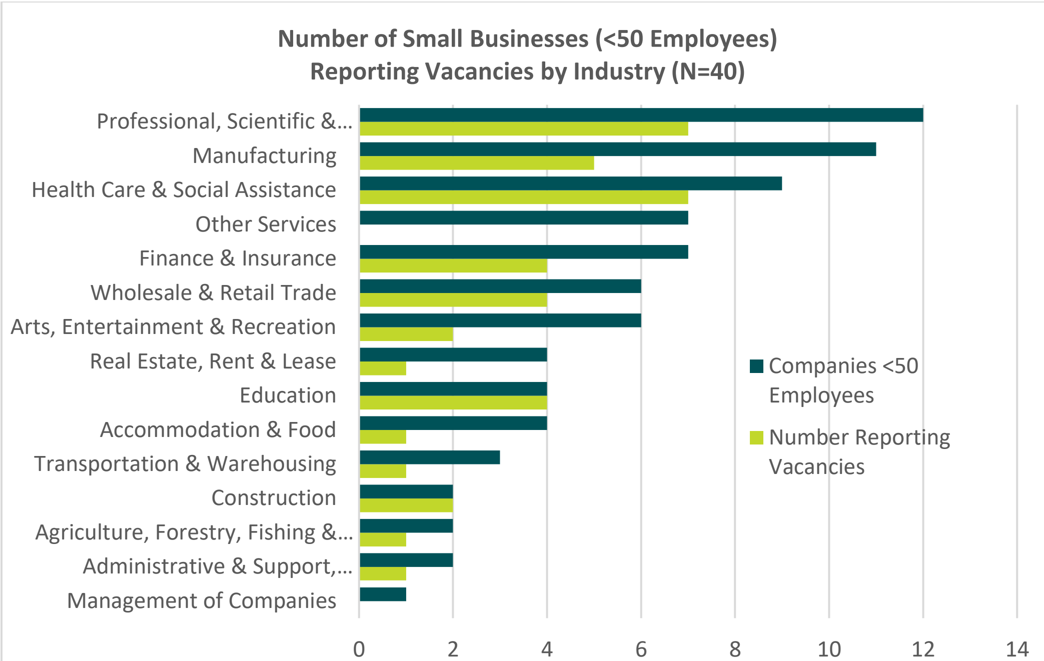
Job Vacancies

At least one job vacancy was reported by 57% of all employers, with businesses operating in health care & social assistance; professional, scientific & technical; and manufacturing reporting vacancies across most major occupations. Overall, employers reported the highest number of vacancies in management occupations, followed by business, finance & administration jobs; sales & service jobs; and trades, transport & equipment operating jobs. While health care & social assistance employers report the highest share of reported vacancies, only a small number (N=3) of these job openings were reported in health-specific occupations.

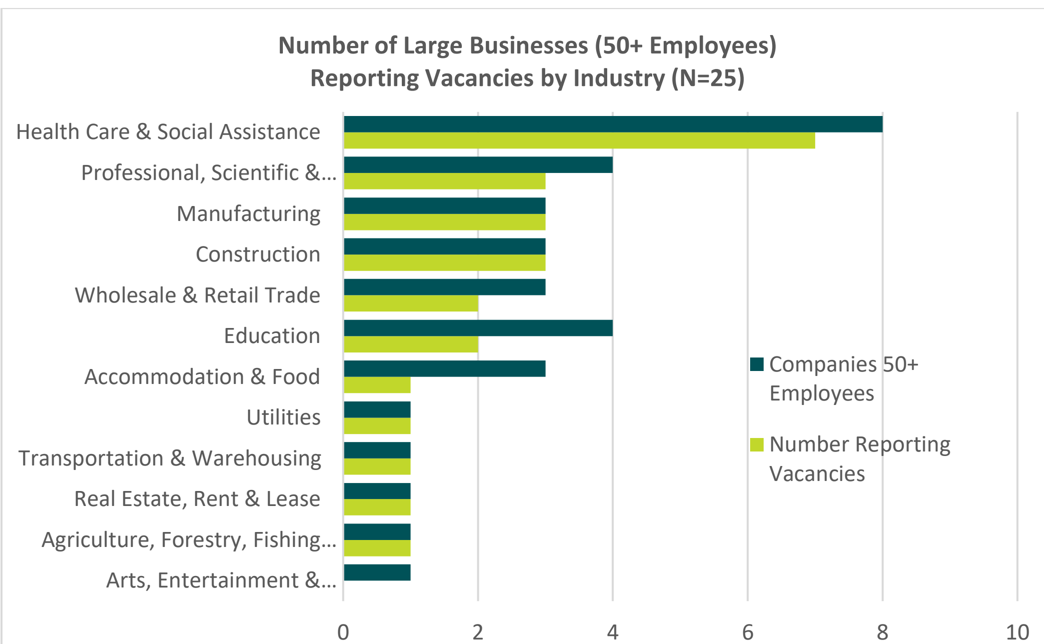
Employers Reporting Vacancies (#)	Industry	Vacancies by Major Occupation									
		Mgmt	*Bus., Fin. & Admin*	*Sales & Service*	*Trades, Transp. & Equip.*	*Nat. & Applied Science*	*Educ., Law, Social, Govt*	*Mfg & Utilities*	*Nat. Res. & Related*	*Art, Culture & Rec.*	*Health*
14	Health Care & Social Assistance	3	5	3	1	-	6	-	-	1	3
10	Professional, Scientific & Technical	4	4	2	2	5	1	-	1	-	-
8	Manufacturing	4	2	5	1	3	-	6	1	3	-
6	Education	2	-	1	-	-	2	-	-	-	-
6	Wholesale & Retail Trade	2	3	4	3	1	-	-	1	-	-
5	Construction	5	2	-	4	1	-	-	-	-	-
4	Finance & Insurance	-	1	1	-	-	-	-	-	-	-
2	Accommodation & Food	1	-	2	1	-	-	-	-	-	-
2	Agriculture, Forestry, Fishing & Hunting	1	1	1	-	-	-	-	1	-	-
2	Arts, Entertainment & Recreation	2	-	-	-	-	-	-	-	-	-
2	Real Estate, Rental & Leasing	1	-	-	2	-	-	-	-	-	-
2	Transportation & Warehousing	1	-	-	1	-	-	-	-	-	-
1	Admin. & Support, Waste Mgmt	-	-	-	-	-	1	-	-	-	-
1	Utilities	1	1	-	-	-	-	-	-	-	-
65 (57%)	**Totals**	**27**	**19**	**19**	**15**	**10**	**10**	**6**	**4**	**4**	**3**

Among the 65 employers reporting current vacancies, 40 are defined as small employers (i.e. less than 50 workers) and 25 are defined as large employers (i.e. more than 50 workers). In percentage terms, 50% of small employers surveyed (N=80) currently face labour or skills shortages, while 76% of large employers (N=33) face similar labour supply challenges.

Except for two industries (i.e. Management of companies and Other services), small employers reported job vacancies across all other industries encompassed by the survey. Vacancies were highest in those industries that dominated the response, including health care & social assistance; and professional, scientific & technical employers.



A similar picture emerges among large businesses where vacancies were reported across all industries except arts, entertainment & recreation. Note that several other industries are not represented by Surrey employers with 50 or more workers.



SURREY BOARD OF TRADE
inclusive | innovative | independent

Section 3a – Attraction, Recruitment, Retention (Q7 a & b)

Difficult to Recruit

Respondents were asked to specify their 'top 3' occupations that are considered most difficult to *recruit* for their operations. In terms of volume, employers who require workers in sales & service, trades, transportation & equipment operations and management reported the largest number of "difficult-to-recruit" positions. This is generally consistent with the previous section's results pertaining to the current number of vacancies in these occupational categories. It is important to note that as a share of Surrey's occupational workforce these three categories account for three of the four largest employment categories in the Surrey economy (see *Figure 13, Secondary Research & Promising Practices Report*[11]).

Occupational Category[12]	By Order of Recruiting Difficulty		
	1st	2nd	3rd
Management	Senior executive (2); mid-managers (6); project manager; construction manager	Mid-managers (3); sales managers; marketing manager; construction manager	Project manager; senior manager
Bus., Fin. & Admin	Clerical; quantitative analyst; accountant (2); help desk; funeral attendants; estimator; insurance admin	Finance officer; bookkeeper (2); junior accountant (2); investment admin; office admin (2); accounting tech (cloud)	Office assistant; payroll; bookkeeper; clerk
Nat. & Applied Science	IT programmers; civil engineers (2); design engineer; SW designers; toxicologist; elec. engineer; drafters; network architect	SW developer (2); ecologist; network engineer; IT security; engineer	Design engineer; drafters; biometrician; IT security; electrical technologist
Health	MDs; Physician; RMT; optician; RN (2); clinical counsellor (2)	RMTs; physio	Physio
Educ., Law, Social, Govt	Grant officer; infant supervisor; community support; cognitive coach; ECE; employment counsellors; dance teacher; ECE; legal assistant	ESL teachers; ECEs; urban planner; support worker; counsellors; lawyer; aide worker	ECE supervisor; employment specialist; immigration lawyer; care aide; accessibility advisor
Art, Culture & Rec.	Racetrack workers	Graphic artist	Graphic design
Sales & Service	Corporate sales; sales rep (4); manufacturing sales; general sales; sales admin; service staff; showroom sales; social media rep; retail sales; housekeepers; hotel clerk (2); maintenance; import/export admin; freight broker; marketing rep; service tech	Sales reps (5); front desk staff; outside sales; in-store designer (2); reception; client relations; public relations; housekeepers; purchasing; marketing coordinator	Service rep; inside sales; stock person; cemetery sales; night auditor; dishwasher; recruiter; marketing coordinator
Trades, Transport & Equip.	Spring maker; drivers & warehouse (2); site supervisors; welder;	Drillers helpers; machinist; site safety; site supervisor; labourer (3); shop hand;	Labourer; HD mechanic; shop helper; tech manager; machinist; concrete finisher;

[11] In 2016, the top 4 occupational categories in the Surrey labour force were: Sales & Service; Trades, Transportation & Equipment Operators; Business, Finance & Administration; and Management.
[12] The frequency of responses for a specific occupation is in parentheses.

Occupational Category[12]	By Order of Recruiting Difficulty		
	1st	2nd	3rd
	millwright; CNC programmers & machinists; cooks; baker; carpenters; building T&Ts; saw cutters; construction foremen; stone mason; HD mechanic; auto paint	project superintendent; CNC machine operators; electricians; tile setter; welder/fabricator; transport dispatcher; non-destructive testing; auto body; maintenance engineer; marine superintendent	quality control tech; carpenter; upholsterer; equip operator; CNC operator; driver; mason; tile setter; foreman; truck dispatch; welder/fabricator; driver; cook; warehouse manager; asst superintendent (marine)
Natural Resources & Related	Geotech driller; machine operator; agri. worker; landscape workers	Agri. supervisors; grounds crew	Not cited
Manufacturing & Utilities	Not cited	Manufacturing / operations manager	Not cited

Difficult to Retain

Respondents were similarly asked to indicate the 'top three' occupations that are considered most difficult to *retain* for their operations. Again, employers who require workers in sales & service jobs and in trades, transportation & equipment operations reported the largest number of positions where it is difficult to retain. Many of the jobs identified in these categories were identified as both difficult to recruit and difficult to retain.

Occupational Category[13]	By Order of Retention Difficulty		
	1st	2nd	3rd
Management	Construction manager; mid-manager	Sales manager; mid-manager (2)	Project manager; mid-manager
Bus., Fin. & Admin	Admin assistant (2); clerical staff (4); accounting staff (4); payroll admin; senior accountant	Reception (2); office manager; exec assistant; invest admin; accounting tech	Financial planner; fundraiser; accountant; office assistant; bookkeeper; claims coordinator
Nat. & Applied Science	SW developer (2); civil engineer; environmental tech; electrical engineer; IT network	Data analyst; network engineer	Civil engineer design; biologist; IT security
Health	Medical office assistant; physician; optician; RN (2); clinical counsellor	RMT; care aide; RN	Physicians; LPN, dietary aide
Educ., Law, Social, Govt	Grant officer; ECE (3); support worker; cognitive coach; ESL teacher; legal assistant; care aide	ESL teacher; ECE; support worker; legal assistant (2)	ECE assistant; immigration lawyer; accessibility advisor
Art, Culture & Rec.	Not cited	Not cited	Not cited
Sales & Service	Import/export admin; night clerk; salesclerk (3); housekeeping; outside sales; sales rep; cemetery sales; service tech; mall supervisor; employment counsellor (2); help desk tech	Marketing staff; funeral attendant; kitchen staff; housekeeping; service rep; recruiter; sales rep; server	Operator (sewing); service rep; sales rep (2); night auditor; stone setter
Trades, Transport & Equip.	Machine operator; driller assistant; shop hand;	Labourer (2); driller; millwright; site safety staff;	HD mechanic; pipe layer; CNC machine operator;

[13] The frequency of responses for a specific occupation is in parentheses.

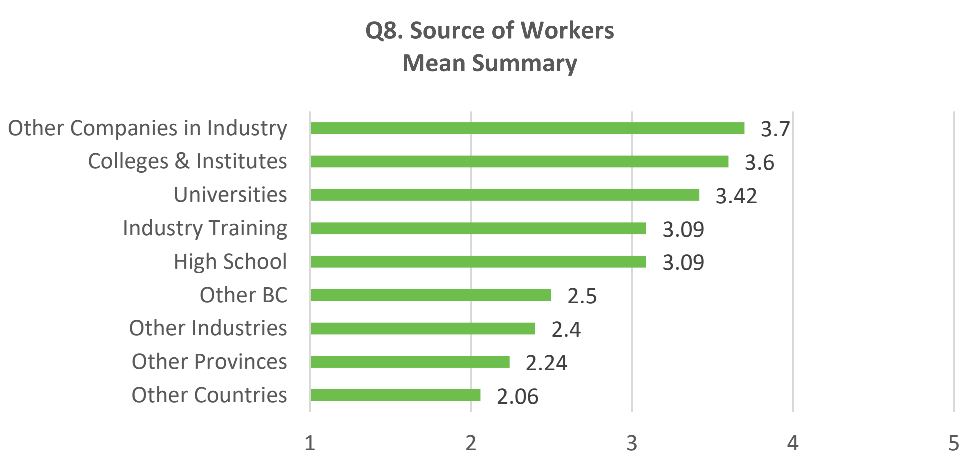
Occupational Category[13]	By Order of Retention Difficulty		
	1st	2nd	3rd
	drivers/warehousing; site supervisor; metal workers; labourer; shop hand; CNC machinist; project coordinator; cook; saw cutter; tile setter; auto paint; welders/fabricators	equip operators; CNC programmer; carpenter; plumber; mason; electrician; stone setter; truck dispatch; autobody; fabricator/welder; superintendent assist (marine)	construction supervisor; truck dispatch; welder/fabricator; driver
Natural Resources & Related	Agri. labourers; landscape worker	Not cited	Not cited
Manufacturing & Utilities	Not cited	Not cited	Not cited

Section 3b – Attraction, Recruitment, Retention (Q8, Q9, Q10, Q11, Q12)

The following analysis highlights the response to a series of Likert-scale questions examining the sources and methods used by employers for recruiting and retaining workers, as well as the challenges associated with these practices. Mean (average) summaries are provided for each question ranging from highest, (i.e. 5) to lowest, (i.e. 1) by individual measure. More detailed results for each question and measure are provided in Appendix A.

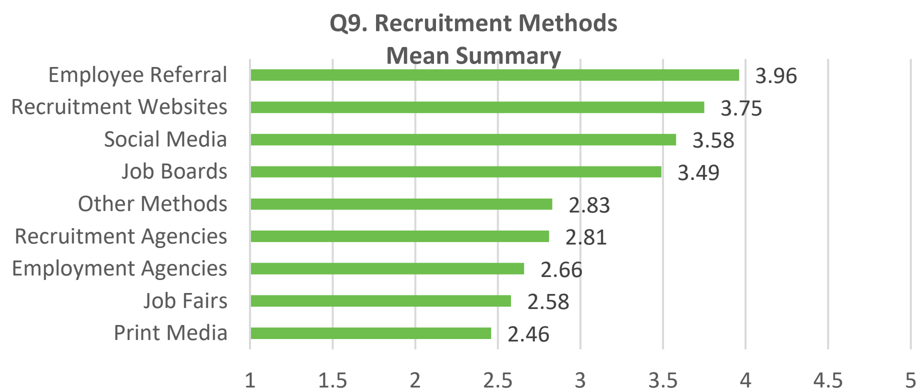
Source of Workers (Q8)

Employers were asked to rank sources of workers by level of importance. Results show that employers most heavily rely on other companies in their industry for new workers, suggesting a high degree of worker mobility among companies in the same industry. Employers also rely heavily on formal education and training providers for new workers. This would suggest that employers generally require a more experienced workforce and workers with skill sets based on some level of post-secondary education or training. Other countries, other provinces and other industries on average were less utilized as sources of workers among the employer respondents in this survey.



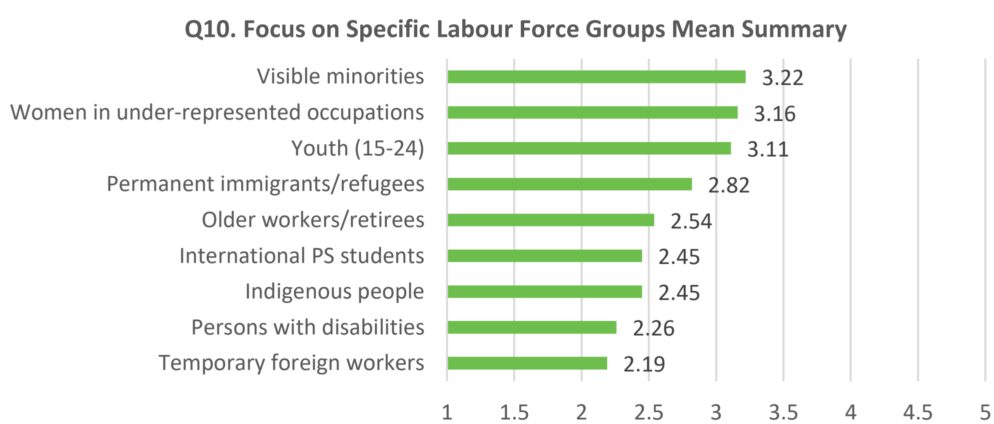
Methods of Recruitment (Q9)

Employers were asked to rank methods for recruiting new workers to their organization by level of importance. Results show that employers rank referrals from existing employees as the most used method, highlighting the importance of employee-employer relations and informal employee networks. Recruitment websites and social media are also considered important methods of recruitment. More traditional forms of recruitment, such as job boards and "word-of-mouth", remain important sources of new recruits. These methods may tend to be more cost-effective and practical. While relatively moderately utilized, employment agencies, job fairs and print media were rated the least used by employers responding to this survey.



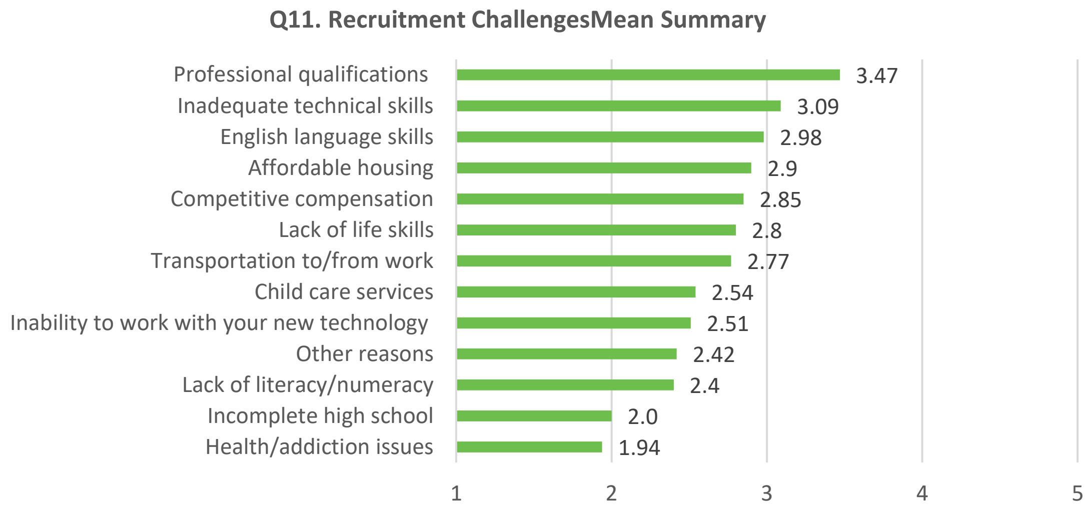
Focus on Specific Labour Force Groups (Q10)

Survey respondents were asked to indicate the degree to which they rely on individuals from specific segments of the labour force, (i.e. those that may be underutilized in the general workforce) for their labour. Members of visible minorities, women and youth populations are recruited quite extensively by employers, while other groups such as persons with disabilities and temporary foreign workers are used less so. Some employment restrictions may apply to certain groups such as international students and temporary foreign workers and may therefore produce the relatively lower use in these responses.



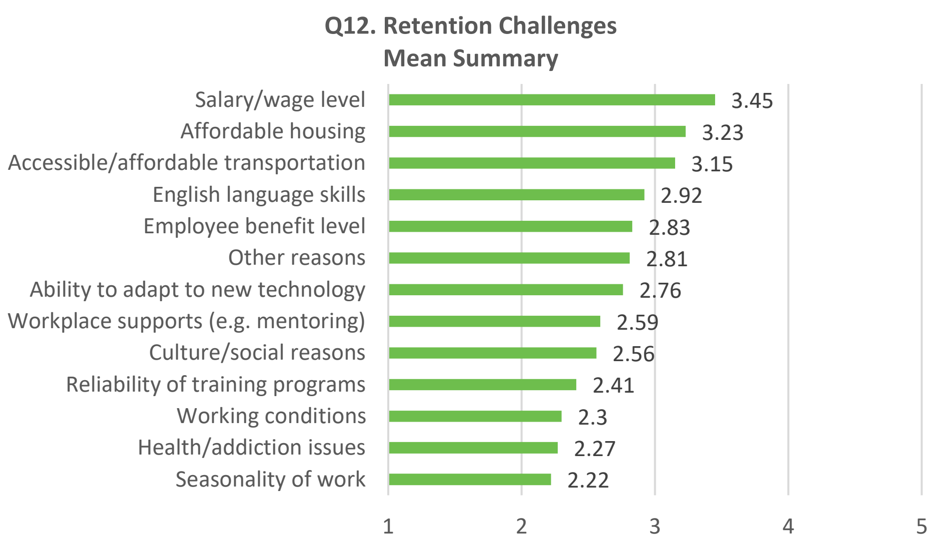
Recruitment Challenges (Q11)

Employers were asked to rank by importance the challenges (reasons) they face when recruiting new workers. Skill requirements, including professional qualifications, technical and language skills, ranked highest among employers who responded to the survey. Associated work issues, such as affordable housing options, adequate transportation options, childcare availability and health/addiction issues, ranked lower in the opinion of most employer respondents. The lack of a strong work ethic and shortages of labour were other reasons contributing to the challenge of recruiting new workers.



Retention Challenges (Q12)

Employers were also asked to rank by importance the challenges (reasons) they might have difficulty retaining workers. The provision of a competitive salary or wage level was ranked highest amongst employers, suggesting that workers generally are interested in pursuing job opportunities that pay better. Affordable housing and transportation options also ranked in the top 3 reasons employers are challenged retaining workers. It is reasonable to expect that lower paying jobs in high cost areas may make it difficult for workers to make ends meet. Working conditions, health issues and work seasonality were deemed the least important retention factors for employer respondents.

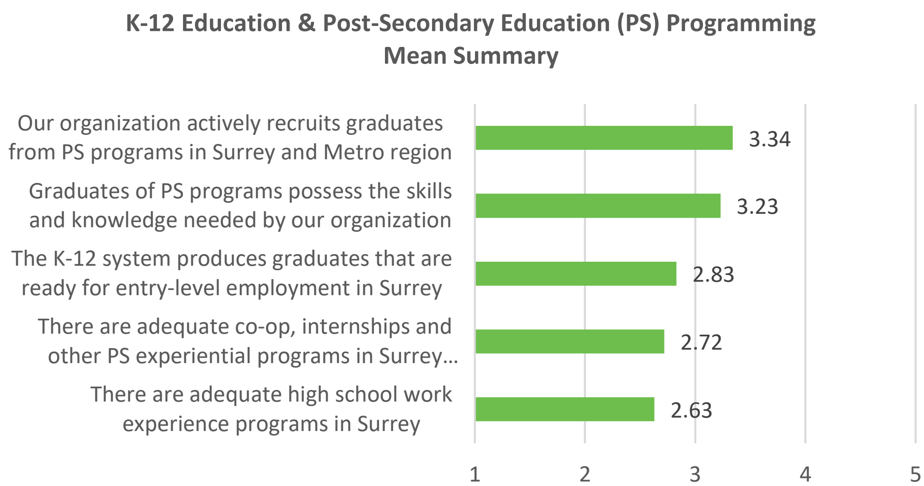


Section 4 – Education, Training, Employment Programming (Q13, Q14, Q15)

This section of the employer survey involved assessing the use and value of the K-12, post-secondary and the industry training system for the purpose of helping meet the human resource requirements of Surrey employers. Employers were asked to indicate their level of agreement/disagreement with a series of statements on education and training programming provided in Surrey and the Lower Mainland. Mean (average) summaries are provided for each statement ranging in scale from highest, (i.e. 5) to lowest, (i.e. 1) level of agreement.

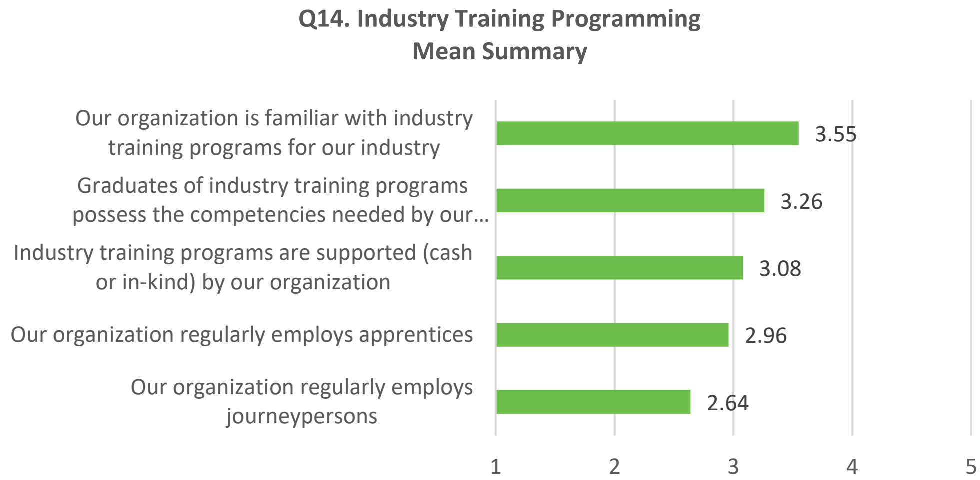
K-12 Education & Post-Secondary Education Programming

The graph (next page) indicates that employers generally recruit graduates of the regional post-secondary system, as most agreed that they possess the skills needed by their organizations. A smaller portion of respondents agreed that adequate experiential programs are available at either the post-secondary or high school level in Surrey and across the region. Further, most employers similarly agreed that high school graduates are adequately prepared for entry-level employment.



Industry Training Programming (Q14)

Employers were asked to indicate their level of agreement with a series of similar questions pertaining to graduates from the industry training, (i.e. apprenticeship and pre-employment/foundation programs) system. Overall, employers have a favourable view of the system and that program graduates possess the skills needed by their organization. Fewer employers, however, indicated that they employ apprentices and journeypersons for the operations. This is likely due to the skills and labour needs of the respondents to the survey.


Q14. Industry Training Programming
Mean Summary
Our organization is familiar with industry training programs for our industry
Graduates of industry training programs possess the competencies needed by our...
Industry training programs are supported (cash or in-kind) by our organization
Our organization regularly employs apprentices
Our organization regularly employs journeypersons
3.55
3.26
3.08
2.96
2.64
1
2
3
4
5

Other Strategies and Policies to Enhance Education, Training and Employment (Q15)

As a follow-up question, employers were asked to provide other strategies or policies that might improve education and training that helps to meet the human resource requirements of employers. A number of suggestions were put forward that include (in no particular order):

- Incentives or assistance to employers to hire workers
- Better information on options for employers
- Career information for students, teachers and parents
- Integrating and recruitment of more skilled immigrants, minorities and indigenous people
- More emphasis on trades training and careers
- Better English language training and assessment

Respondents' Final Comments (Q16)

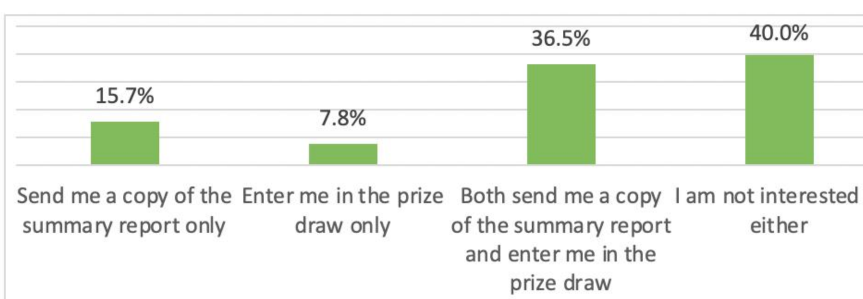
Employers were provided the opportunity to share their final thoughts on human resource issues in their Surrey operations and opportunities for addressing challenges they might face. Key themes included the following:

- Many of the comments (>25) centered on work-related challenges, such as affordable housing and the rising cost of living in Surrey, as well as inadequate transit options.
- Increased or chronic skilled labour shortages.
- Some respondents noted the need to better utilize underrepresented labour pools (e.g., youth, immigrants/refugees and persons with disabilities).
- Some respondents suggested there was value in developing new education and training in Surrey.
- A few respondents called for the need to better prepare entry-level workers with sufficient English language skills, and other cited the need for a stronger work ethic among jobseekers.

Copy of report (Q17)

Sixty percent of respondents wanted a copy of survey summary report and/or entry into the prize draw. Interestingly, 40% of employer did not want either – this may not mean a degree of disinterest but rather an interest in maintaining their anonymity.

Please indicate if you would like to receive a summary report of the results and/or be entered in the prize draw.
(N=115) Mean (3.01)



Employer Survey Conclusion

Results of the survey provide an important snapshot of employer perspective and opinion from a relatively small sample of Surrey-based business operations. With few exceptions, all major industries are included in the survey response with representation highest amongst health care and social assistance providers, manufacturers and professional, scientific & technical businesses. Small companies with fewer than 50 employees dominate the response (69%). Employers of workers in education, law, social services and government account for the largest number of total employees (62%), though this result is heavily skewed by the inclusion of the Surrey School District which employs more than 11,000 workers.

Current job vacancies were reported by 31% of employers, while the majority indicated being fully resourced at this time. Labour and skills shortages are an important theme amongst respondents, particularly in occupations requiring higher levels of education and training, where competition for talent is high across most jurisdictions. The response would suggest the supply of workers for lower level occupations is adequate, though turnover remains high in most jobs. Surrey benefits in this regard from a more rapidly growing younger population than many other jurisdictions in BC.

A similar percentage of employers (30%) are optimistic that their business and staff requirements will increase over the next five years. This is particularly the case amongst employers of workers in business, financial & administrative jobs, and sales & service jobs. For the most part, many of these jobs do not require higher levels of formal education or training. In-house training is important to developing productive workers in these occupations.

Employers facing labour and skills challenges report they are typically challenged both recruiting and retaining needed workers. Compensation is an important factor amongst all employers, but more so among small employers who have difficulty paying higher wage levels. This results in high turnover rates as workers frequently seek higher paying job opportunities. Associated work challenges, such as housing affordability, cost of living expenses and inadequate transit options, are also major deterrents impacting workers in lower wage occupations. This is an important consideration for many employers having difficulty both attracting and retaining workers in Surrey operations.

Graduates of education and training programming at all levels are a key source of labour for employers at both entry-level and higher skilled positions. However, employers generally agree that too few experiential programs are currently available to Surrey students at either the high school or post-secondary level, limiting their progress in the workplace. Similarly, employers are generally supportive of industry training programming, as most program graduates possess the level of skill needed to perform the work.

Key Informant Interview Findings

Respondent Profile

Thirty-one employer representatives with operations in Surrey were interviewed. See Appendix 1 for a list of organizations.

Employers interviewed range in size from three employees to 11,000 employees. Excluding of the largest employers involved – City of Surrey (4,000) and Surrey School District (11,000) – the other employers interviewed total 10,400 or an average of 359 employees per organization.

Eleven of key informants represent large employers in Surrey; six represent employers with 50 or less employees; five represent 60 to 100 employees; and nine represent more than 100 to 300 employees. The employers interviewed range in years in operation in Surrey from one year to over 110 years, with an average tenure of 35.6 years.

The sectors in which the most employers interviewed are:
1. Construction (7)
2. Manufacturing (5)
3. Technology (4)
4. Education/Post-Secondary Education (3)
5. Accommodation and Food Services, Retail, Agriculture or Agricultural-Based Manufacturing (2 each)

Employers from other sectors interviewed include Energy, Finance, Professional Services, Tourism and Transportation (1 each). Interviewee positions among the key informants were a good mix of owners, partners, executive (Presidents/CEOs/Executive Directors), Vice-Presidents (Operations, Talent/HR), Directors of departments, etc. All Surrey town centres were represented by key informants interviewed, with most employers' operations located in City Centre and Whalley and a few in each of Fleetwood, Guildford, Newton and South Surrey; and one in Cloverdale.

Almost half (14) of the employers interviewed have multiple locations, many with headquarters or head offices in Surrey. Three employers were national with operations in Surrey; the rest were western Canadian, across BC or Lower Mainland or southwestern BC based.

Perspectives on Factors Impacting Business Growth

This somewhat open-ended question triggered responses that can be categorized in six areas of focus. Respondents offered their perspectives on labour supply, economic/political issues, cost of living/housing, public transit, location and the nature of work their organizations perform. Not surprisingly, there were differing views on each topic however respondents were united in their serious concerns about the lack of labour supply – especially skilled labour. Each area of focus is described briefly below.

Labour Supply

Employers spoke about the competitive marketplace and the increasing difficulty they have had in sourcing appropriate workers. This was explored further, later in the interview process, when respondents were asked for more details on their perspectives regarding labour supply. Some representative comments regarding labour supply include:

- We are competing for back of office, admin talent.
- Not a lot of labour supply out here. Can address thru relocation into BC but cost of living and housing makes it difficult
- Access to labour is a challenge like it has never been before – I don't remember this many storefronts with 'hiring' sign
- Lack of available labour

- Lack of skilled labour
- A lot of time and thought to ensure we have the right talent in order to grow
- Finding skilled people who know the business is difficult
- Can't grow top line
- Want to improve quality but can't without staff
- There is a general lack of employees
- We are turning work away because we are too busy
- Hard to find manpower in the construction industry
- This has been the hardest year ever for hiring in all occupations

Economic and Political Issues

A number of respondents identified political and economic issues as factors influencing their ability to grow their businesses. Some wondered and worried about the effects of the recent downturn in the local housing market and about how issues like unemployment, the US political situation and trade in global markets would impact their respective operations. There were comments on the possible negative impact of the BC provincial government's economic policies and priorities. One organization cited their reliance on US customers/investors and whether that would prompt a relocation south of the border.

The following bullets were typical of the responses received:

- Unemployment rate/economy affect spending
- Pricing – a lot competition; cost pressure from labour costs, government costs (e.g. health tax, minimum wage increase
- Greatly affected by slowing down of housing market in last 6 months.
- A lot of uncertainty with NDP government
- Can't keep up with the growth. Infrastructure hard to keep up.
- We are investment dollar driven, as a Canadian company – vital to us. Get more attention from US investors than Canadian. Whether that causes us to go to US remains to be seen.
- Super interested to know how a recession will affect video production.
- Political/policy decision making. Elements like CleanBC
- External factors like global markets impact our business (Trump/China)

Cost of living/housing

The affordability of housing in Surrey was top of mind with many interviewees. Almost without exception, interviewees reported that the cost of housing was prohibitive and that it restricted their ability to attract and retain workers. This conversation brought into focus the relatively higher costs of living in neighbouring Vancouver and the attractive lower costs in communities to the east. One employer noted that at least one of their staff commutes daily from Chilliwack. Abbotsford and Langley were mentioned more frequently as relatively affordable alternatives. Another employer noted that it was not uncommon for employees to work two or more jobs to get by. See the bulleted list for a sample of the comments received by the interviewers.

- Cost of living – not as big a factor – we deal with this in other markets
- Most of our staff are living in Abbotsford and east if young; townhouses or apartments in Lower Mainland
- A challenge re talent to come out/live here.
- Housing is an issue. Some of our trades can't afford housing
- Challenging to relocate people from other parts of BC (e.g. Kelowna) to move them internally to Surrey because of cost of living
- We hear from especially newer folks about difficulty of finding accommodation.
- Generally speaking, due to the high cost of living in the lower mainland, we find attracting talent from other provinces/countries can be challenging for this reason.
- Rental housing is too expensive locally and we don't pay the highest wages
- Cost of living is a big factor for workers at the lower end. Many are working 2 jobs to make ends meet

Transportation issues

Respondents were divided on the issue of transportation – notably public transit. It is apparent from the responses that areas with effective public transit have a positive outlook while those with limited or no transit have strong feelings to the contrary. While this is self-evident, there remains an underlying message to make public transit more efficient and equitable. Here are some typical comments:

- Transportation hasn't been a deterrent. Most of our folks live and work here, have a vehicle
- Transit and affordable housing are big for attracting people
- The transit in Surrey could use improvement. A major factor. In recent weeks we had people not be able to make it to work.
- We don't have transit issues
- Not on a bus route. Employees need to have a car - 1.5-mile walk from nearest transit.
- Hours are not conducive to public transit (respondent operates 24/7 with shifts ending in the overnight hours)

Location

A small number of interviewees mentioned Surrey's geographic location as a positive contributor to business growth. This subject was probed more deeply later in the interview. There was a distinction made between communities north and south of the Fraser River. In essence, the argument was made that communities on the south side were better positioned because of their relative ease of access when compared to those on the north side. The principal south side advantage was the lack of bridges.

On a more general level, some interviewees made particular mention of the relative ease of attracting younger workers to Surrey when compared to Vancouver.

One employer said "Our main projects are in Surrey – going thru huge growth. We own quite a bit of land in Whalley and will continue to develop and buy more. Surrey is a good place to be. Near SkyTrain."

Nature of work

Finally, an interesting theme became evident through the course of the interviews. Employers acknowledged that the nature of the work they do has a direct bearing on attraction, recruitment and retention. For example, companies engaged in construction face resistance from potential workers who don't consider the career 'sexy'. One fish processing plant shared that sentiment, suggesting that workers would prefer to work where they are not exposed to the noise, smell, and mess of that environment. In a similar vein, a hotel operator suggested that employees view hospitality occupations as a 'job' – not a 'profession'.

Expectations about Technological Developments

Interviewees were asked to share their perspectives on technology and its impact now and in the future. Several themes emerged from the conversations including rationalizing the expense of technology, HR implications (including training), Business process improvements, and leadership. There was also a sizeable number of interviewees who reported 'lagging behind' in terms of technology. Each theme is briefly described below.

Rationalizing investment in technology

Perspectives were mixed on the cost of technology. Some employers reported being heavily invested and reliant on new technologies while others questioned the value proposition. On balance, more companies appear to be willing to adopt new technologies and are able to recoup costs through greater productivity. Here are some relevant comments from key informants:

- We are heavily investing in tech
- As labour costs increase, makes sense to invest in technology
- Have invested heavily in technology (cloud accounting)
- Integration of technology is challenging due to cost
- We are leaders in tech and have been heavily invested since 2009
- Too expensive to invest in technology
- In video production have to update our gear every 5 years. We've kept up with that even though it's expensive

HR implications of technology

Interviewees had much to say about the implications of technology on human resource practices and training. Responses varied somewhat based on the diverse nature of the sectors involved in the study. While many of the comments were positive, one employer noted that some technology e.g. smartphones and wearable technology can be distracting. In terms of training implications, thoughts included:

- We have change management and tech training available any time tech changes
- Have to bring in more educated people in now, not basic labour. Have to read. Critical thinking. Different workforce than 20 year ago
- Using technology to conduct more meetings between campuses, more technology in the classroom to increase faculty-student interactions
- Looking at more online and distributed learning
- Learning hubs in the new building – in circles and supported by technology at each station
- Anyone coming to us now needs to have the software skills; clients so into mobile technology so integration between phones, desktops

On a more general HR level, interviewees reported that technology changed the 'type' of employee to recruit. Younger demographic expects technology at their fingertips. This tempered by the assertion that the job has to be 'right' for technology to be beneficial. Some interviewees cited efficiencies inherent in technology e.g. "We have lots of machines that allow better productivity with the same number of staff."

Business process improvements

The bulk of comments from employers referred to the business process improvements associated with the use of technology. Responses again varied by sector. Nevertheless, it was apparent that the availability of data and its application in decision making was seen as a game changer. Comments included:

- We are making more use of data to drive decisions
- We are working on increasing our 'data proficiency'
- Our administration is data-driven
- The speed of information flow is rapidly increasing
- We see continuous improvements in IT

Some made reference to the role of customer-focused technology with comments like:

- E-commerce is more prevalent than ever
- Search engine optimization has helped drive customers to our website
- Online access to product knowledge reduces reliance on product experts
- Consumers are much more informed from the internet

A sub-theme that emerged during conversations with key informants was the impact of technology and automation on production activity. Generally, it was evident that some companies paced greater emphasis on technology that improved and enhanced production than they did on office automation or management technology. The implication was that when funds to support technology are limited, the emphasis should be on technology that directly and measurably impacts the bottom line. Comments in this area included:

- CNC machines have changed our operations
- Always looking for new technology but we are still a labour-intensive sector
- Automation has changed our business – able to buy peeled potatoes, garlic and onions – big labour saving for us
- Automated lumber grading is being done on a limited basis
- Most of our technology efforts are in operations
- PLC's are used extensively
- On the floor, industry is leaping forward towards Industry 4.0 models.

Leadership in the application of technology

A small number of interviewees made reference to being leaders in the adoption and application of technology – some at a high-dollar level and some at a much more modest level. Here are some of the comments shared with the study team.

- We are leaders in technology - We own one of only two specialized machines, valued at $900k
- In terms of marketing ourselves, we are on FB and Instagram and YouTube in Vimeo. As a way to stay in touch with our clients as opposed to market for new clients.
- Cloud accounting, important to have that scalable tech infrastructure in place. For example, was relatively easy to set up new satellite offices in Richmond and Victoria – plug and play essentially

Lagging behind

The final theme that became evident during interviews was the reality that some organizations and operations feel that they have not and likely would not benefit from technology or automation. Some acknowledged that they are lagging behind with comments like:

- We are dinosaurs – still doing paper-based payroll
- We are slow to pick up on technology, but we are early adopters of new tools and equipment
- Our tools are behind
- We are light years behind
- We should be looking at 'order at the table' in our restaurant

Still others expressed the perception that technology simply wasn't on their radar. A fish processing plant, for example suggested that fish lifecycles and seasonal variances in processing, coupled with the challenges of working with animal products made the adoption of technology impractical and that the 'traditional ways' of doing things was still the best. Here's what a couple of interviewees said:

- We have no real automation and are not affected by technology
- Our business is labour-intensive – no practical use for technology in the work we do
- We are not automated for the most part

Positive and negative perceptions of being located in Surrey

Respondents were overwhelmingly positive about being located in Surrey. There were very few negative comments received by the study team. The vast majority cited the favorable comparison in cost of living between Vancouver and Surrey, adding that the proximity to Vancouver was a very positive attribute.

A second significant positive attribute identified by a large proportion of respondents was the efficient transportation infrastructure (including public transit). These positive comments were offset somewhat by a few interviewees who felt that public transit was lacking in some communities.

The availability of labour was seen as a positive attribute as well. In addition, the diverse nature of the population in Surrey and its large and growing number of immigrants were largely viewed as positive. Here is a sampling of the many positive comments received by the study team:

- Located against traffic and located on a SkyTrain line – a big plus
- More infrastructure and services, continue to grow Surrey's image – safe, innovative, progressive
- A positive – this geographic location. Ideal in terms of location for markets; transportation infrastructure, rail network, US border access
- Definitely helpful. Having stores in Surrey offering them locations near where the live or work instead of going to Vancouver or elsewhere
- North Surrey is just about the centre of Lower Mainland
- A net positive for us to be in Surrey – located near our market – have facilities here superior to downtown
- Surrey is overall helpful because lower cost of living and people can live and work here.
- Helpful. Lot of our workers live in Surrey and housing less expensive and convenient for travel access
- Location is ideal
- Highway access is convenient

Among the negative perceptions were references to high profile crime, especially drug- and gang-related. In addition, there were some negative comments made about land costs, taxes and the municipal political system. Here are some examples:

- Infrastructure, esp. roads could be better

- Public transit is an issue
- When expertise comes from less expensive towns, they take a big hit
- No transit available – cars only
- Perception of high crime but we don't see it as an issue
- Not near sky-train
- Workers are reluctant to travel
- Bus routes aren't really that practical
- Another impediment – the infrastructure – transportation and health care
- The new mayor is a problem

The mix of informants yielded some interesting one-off comments about Surrey such as:

- We have good water
- Power outages are common
- Proximity to SFU is good
- Good internet connectivity
- Surrey one of the best places to do video production
- Excited about discussions with SFU to build a talent pipeline

Workforce Issues and Challenges

Our questions about workforce issues and challenges relate to: 1) whether or not Surrey-based employers are experiencing labour and/or skill shortages and, if so, what is behind this; 2) whether or not they are experiencing difficulties in attracting and recruiting workers, and in which occupations and why; and 3) whether or not they are experiencing difficulties in retaining workers, and in which occupations and why.

The employer responses range from no labour/skill shortages or difficult-to-fill vacancies to experiencing significant shortages/vacancies, some both low-skilled and high-skilled shortages simultaneously. Very few employers are experiencing no shortages or difficult-to-fill positions; it was more a matter of degree of shortages in talent supply. Employers with no shortages tend to be either very large companies that are able to attract and tap into various talent pools or small companies that only need to fill small numbers of positions and rely on internal, on-the-job training for low to mid-skilled positions.

The nature of skill gaps tends to be sector-specific and vary by employer interviewed. Shortages or vacancies tend to be in the following lower and higher skilled/qualified occupational categories:

Lower Skilled:

- Food services
- Accommodation services

- Retail sales
- Manufacturing (e.g. semi-skilled machine operators)
- Agricultural and related occupations including animal product processing
- Construction and other general labour
- Back of house (dishwashers, preppers)
- Housekeeping
- Forestry

Higher Skilled

- Technology (software developers, financial, information technology, cloud computing)
- Management and professional (e.g. engineers, inspectors, technologists, chartered professional accountants, health care, etc.)
- Specialized and high skilled trades (CNC operators, spray-booth painters, electricians, millwrights)
- Sales and marketing
- Project managers
- Back of house (cooks, bakers, pasta makers)
- Transportation (drivers)

In terms of attraction and recruitment challenges for Surrey employers interviewed, consistent with the patterns in shortages/vacancies, employers' perceptions varied as to whether they have any challenges in this regard or in the degree to which it is a problem. Interviewees' comments included:

- Difficult to move people in here because of cost of living/housing
- Rapid growth in particular areas; supply of this talent isn't in Vancouver area
- Always have some turnover
- We've done quite well.

In terms of retention/attrition issues, Surrey employers interviewed also were on a continuum from no problem, to minor challenges to major and sometimes chronic retention issues. Some representative responses include:

- Haven't faced retention issues other than if they were interested in high end salaries and being downtown.
- Competing with private sector and salary levels. Way higher in private sector.
- Our new technology will help in retention – will need less people per product and more positions will be semi-technical (increased compensation, training and personal development).

- Perception that “labouring” job is just “grunt with a pulse”.
- Not an issue for us. Our corporate reputation. People see us as a stable employer.

In terms of the future, generally most Surrey employers interviewed expected shortages/vacancies, attraction/recruitment and retention challenges to increase because of the following factors:

- Constantly increasing competition among employers for talent.
- A desire among employees to seek higher wages and better benefits
- A lack of loyalty to employers.
- Competition from employers that can offer greater flexibility in work hours due to nature of work.
- The growing practice of ‘poaching’ employees.

It is clear that there is a mix of attraction, recruitment and retention challenges facing employers in Surrey. Employers are meeting those challenges with some success – depending on occupation, required skills level and general working conditions. Some see improvements in technology and automation as a double-edged sword e.g. sites like Indeed, Craigslist and others have driven the volume of job applications to new highs while, at the same time, the quality of those applications has generally dropped. While some are actively looking to immigrants and other equity-seeking groups as sources of labour, others are frustrated with the general lack of skilled talent – regardless of the source.

Workforce Education and Training

This part of the employer interviews focused on high school education, post-secondary education and training (public and private), industry/employer-based training and professional and career development.

The intent was to find out: to what extent Surrey employers were hiring graduates of education and training programs (and for which occupations); to what extent they are using industry/internal and on-the-job training for employees; and their comments on possible gaps, about satisfaction with these programs and other comments (e.g. partnerships, awareness, etc.).

Generally, the extent to which employers interviewed hire high school and post-secondary education graduates, is largely correlated with the occupations they hire for. Some positions require post-secondary education, and some do not. Even having positions that do not require post-secondary education does not mean an employer will hire high school graduates for such positions – they may not recruit from either level.

Of the 31 employers interviewed, in terms of hiring high school graduates, ten do not, seven hire few and thirteen do often (one was not sure). Only a few employers explicitly identified participating in high school work experience, co-operative education or high school apprenticeship programs or partnerships.

Among the 31 employers, only three do not recruit from post-secondary programs, five do this infrequently or to a small degree, and the majority, 23, do so regularly. Approximately half of the latter mentioned co-operative education, work-study and internship programs.

Another pattern was that many of those employers who did not hire at all or very little from high school or post-secondary programs are increasingly trying to tap into temporary foreign workers, newcomers, refugees and other international options. Some who hired from post-secondary programs were hiring international students.

The size of the organization and the extent to which it employs skilled workers and those with specialized skills drive whether or not employers conduct internal and on-the-job training. Large employers have the critical mass of employees in similar positions to develop and deliver training programs. Smaller employers with technical positions and company or industry-specific skill requirements tend to supplement in-school training with their own internal or on-the-job skills development.

Probability of professional development opportunities existing were influenced by employers who employed management and professional workers that required regular updating and/or career development to progress in employees' career paths. Also, organizational size (larger employers) also tended to increase the prevalence and extensiveness of professional and career development programs. Although, even smaller employees offered tuition assistance and other supports for employees to participate in external training and development. Very few employers offered no professional and career development and no employee support for participating in such programs.

Post-secondary program preferences among employers in Surrey tended to be employer- and/or industry-specific, so there were few patterns across this group of employers, (i.e. all or most hiring from the same programs). However, many employers emphasized the importance of general work competencies such as essential skills, life skills, positive attitude, punctuality and reliability, etc.

BCIT, Kwantlen Polytechnic University, Simon Fraser University Surrey were frequently cited as sources of hiring for those employers who recruit from post-secondary institutions.

In terms of identified shortcomings or gaps in K-12 and post-secondary education and training, some employers referred to the following needs:

- Financial literacy
- Mental health/wellness
- Soft skills training
- Diversity and inclusion
- Cross-cultural training
- Women in leadership development
- Front-line leadership development
- Manufacturing-specific (specific certain manufacturing processes like cabinets, etc.) trades/technical skills programs

Examples of some positive education, training and skill development practices and programs identified by employers interviewed were:

- Unconscious bias training
- "Stretch" assignments to develop employees
- PowerPlay, a program for high school entrepreneurs
- Cohort training for leadership
- All employees having professional development plan
- Company/industry-based "university"
- The Kaizen Program
- Translation services for newcomers
- Employee cross-training

Other Labour Supply Sources

In this part of the employer interviews we asked about other (in addition to education and training programs) sources of talent that they recruited from and the extent to which these labour sources do and will meet employers' needs.

We used as examples of 'other' possible talent sources, interprovincial and international migrants, underrepresented groups such as persons with disabilities, Indigenous people and women, and workers from other companies and industries.

A common first response to our questions from employers were that they are an “equal opportunity employer,” some of who added that they hire whomever is most qualified and available.

The most prevalent labour force groups tapped into by the Surrey employers interviewed were internationally trained workers (e.g. newcomers, temporary foreign workers, international students) and women. Correspondingly, many of the employers commented on their organizations being ethnically and gender diverse. Approximately half of the employers spoke of actively hiring and needing to start to hire Indigenous persons; and a few mentioned hiring persons with disabilities. Some employers commented on not “being diverse enough” and that they intend to work on increasing this in the future.

Tapping into diverse talent sources cross employer size and sector, indicative of the diversity of the broader Surrey and Metro Vancouver workforce and of some of their positions being more attractive to women. A number of employers commented on employing workers from several ethnic communities.

Some issues identified in the context of answering these questions on other sources of labour supply include the following:

- A recognition by some employers that they need to do more in attracting and recruiting Indigenous persons and persons with disabilities
- The need to reach out more and to get help with this from non-profit and community groups
- References by some employers to the challenges of poaching in the Surrey labour market
- One employer mentioned the need to do more to recruit from and support members of the LGBTQ+ community14
- Due to increasing reliance on newcomers and members of visible minorities, a few employers mentioned the need for more accessible language training, both on and off the job

Overall and generally, the Surrey employers interviewed reflected varying degrees of diversity among their workforces, many currently recruiting from various labour force groups and many realizing their organization needs to continue this and try to do more to a) address their talents needs; and b) be representative of the broader Surrey labour force and population.

Only a few employers reported that they are not hiring from one or more of the labour force groups we asked about.

Labour Market Policy Actions

Respondents had some difficulty with this question and some required clarification on what type of information was being sought. The open-ended nature of the question elicited a range of responses with no easily identifiable themes apart from recurring references to immigrants as a source of labour. A significant number of interviewees expressed views on immigration policy, access to visas, the need for better, more streamlined access to skilled immigrants, language supports, etc.
Here are some examples:

[14] User-friendly acronym for all of the following communities: Lesbian, Gay, Bisexual, Transgender, Transsexual, 2/Two-Spirit, Queer, Questioning, Intersex, Asexual, Ally

- Foreign worker legislation should be improved
- Improvements to Visa system from student to permanent resident
- Immigrants should be fully supported to stay
- More money from government and better international student balance
- Immigrants are paying to get into the country, as much as $50K with no guarantee of a job
- Make it easier to attract skilled immigrants especially Irish, Australian, German and New Zealanders
- Key thing – make access through LMIA easier and more streamlined.
- Newcomers with trade or management experience overseas but no local experience – good to see local education institutions training them in the Canadian experience and move into entry jobs with industry – instead of them working in jobs they are not trained/experienced in in their former country. Government help the colleges to do this.

Another area that elicited strong opinions was training (and training supports). Views on this topic included:

- Adapting curriculum to make sure how you talk about data and managing data is up to date and anticipating future trends. In fast changing occupations, out of date by the time you finish the program. Taught how to think (not just what to think)
- Big value in putting in structured approaches for people entering the workforce for the first time (e.g. newly graduated students, mothers that are re-entering, etc.) to help them navigate the resources and process. Programs and resources for them. Incentives to help.
- We see a serious lack of writing skills among young people. So important for their development
- Would be nice to get some government scholarships. Some govt initiatives for our industry with initiatives of their own. Promoting the industry
- On the funding side, more opportunities for employers to go into these new spaces of training (e.g. Sunrise University) and funding to help employers develop and integrate various immigrants
- Youth have different expectations esp. in trades
- Focus on energy training would help
- School system is too focused on university
- Support women in engineering studies early

Some interviewees mentioned the MSP and employer tax, characterized as an unfair burden for employers:

- MSP and employer tax changes are needed

On a more basic level, this was viewed by some as another opportunity to implore the City to improve its public transit system:

- Better transportation and bike routes

Other issues

In response to this question, interviewees had an opportunity to raise any subject. Many took advantage of the opportunity to expand on points they raised earlier. Others raised new issues. In contrast to the responses to more structured interview questions, there were no readily identifiable themes apart from some best practices – summarized separately at the end of this section. Here is a selection of some of the comments:

- We'll continue to see social media as an important source of recruiting.
- Short term inducements are interesting but need to think through proper urban planning.
- Take the mortgage stress test away
- How flexible can/should you be?
- Government needs to recognize there's different ways of remunerating
- Surrey is full of potential – there is the ability to pioneer here.
- I think Surrey is a great place to do business and work. A lot of red tape for small businesses – would be a relief to further cut it back.
- People want to be challenged and engaged - getting them exciting about change and strategic planning and direction.
- Why can't we have a BCIT out in the Surrey/Fraser Valley? Shortages of trades and other skilled labour, project managers/coordinators.
- I'm sure there's a lot more we can do about engaging our workforce more; determine their motivators, what's driving them.
- We don't get info from the BC Government – to hire local people.
- Surrey listens to contractors - which is a good thing.
- We have 500 people and no transit
- We would like to maintain a casual labour pool of 20 or more staff

Promising Practices

When interviewees were prompted to identify promising practices in attraction, recruitment and retention, a small number of ideas surfaced. These very brief descriptions serve to illustrate the types of talent and broader community practices that have sparked interest and shown 'promise' among some Surrey employers.

The following comments are examples from key informants that hint at success factors for workforce, economic and community development in Surrey and elsewhere – 'in their words'…:

- Creating access to affordable housing. Creating a real community feel. Commuting times. Retail and commercial mix. Feels like a community. Parks and building an affordable quality of life. Short term inducements are interesting but need to think through proper urban planning. How are we building public private partnerships? Achieve synergy. Which major communities are we in competition with (for business and talent)?
- Dialogue where people can come and talk about careers in a safe non-threatening way. New entrants, people working in Canada for the first time. Outside of an interview process.
- Some of the things that the SBOT has done – create spaces for employers to come together to talk about these issues (e.g. employers and post-secondary education).
- A lot of it comes down to information-sharing. You don't want somebody to leave the area because they didn't know. Business and government have an onus to ensure people understand what's going to happen in the next 3 years. Someone doesn't realize what was down the street and so left the area for something they did hear about.
- Keep working at getting the messages out. Get the information into people's hands. Companies in Surrey are leading the world. Why do you need to go somewhere else? Location is becoming less and less relevant. Most people didn't know who they are and yet a company working in very modern high-end areas that people would be interested in for major companies of the world. Now we are in a location with profile and it can be promoted.
- I really appreciated Pull Focus Film School model (http://ydme.ca/pull-focus-film-school/index.html). Get your diploma or degree by partnering with non-profits to do video production/film development that is helpful for the NPO, and the student really benefits.
- More about creating the connection with the employees. I do on a daily basis, try to ensure that everybody shows up and if someone is missing, I reach out to them. This has helped quite a bit.

Perspectives on Factors Impacting Business Growth

Not surprisingly, there were differing views on each topic however respondents were united in their serious concerns about the lack of labour supply – especially skilled labour. Each area of focus is described briefly below.

- Employers spoke about the competitive marketplace and the increasing difficulty they have had in sourcing appropriate workers.
- A number of respondents identified political and economic issues as factors influencing their ability to grow their businesses.

- The affordability of housing in Surrey was top of mind with many interviewees. Almost without exception, interviewees reported that the cost of housing was prohibitive and that it restricted their ability to attract and retain workers.
- Respondents were divided on the issue of transportation – notably public transit. It is apparent from the responses that areas with effective public transit have a positive outlook while those with limited or no transit have strong feelings to the contrary.
- A small number of interviewees mentioned Surrey's geographic location as a positive contributor to business growth. This subject was probed more deeply later in the interview.
- On a more general level, some interviewees made particular mention of the relative ease of attracting younger workers to Surrey when compared to Vancouver.
- Employers acknowledged that the nature of the work they do has a direct bearing on attraction, recruitment and retention.

Expectations about Technological Developments

Several themes emerged from the conversations including rationalizing the expense of technology, HR implications (including training), business process improvements, and leadership.

A sub-theme that emerged during conversations with key informants was the impact of technology and automation on production activity. Generally, it was evident that some companies paced greater emphasis on technology that improved and enhanced production than they did on office automation or management technology. The implication was that when funds to support technology are limited, the emphasis should be on technology that directly and measurably impacts the bottom line.

The key theme that became evident was the reality that some organizations and operations feel that they have not and likely would not benefit from technology or automation. Some acknowledged that they are lagging behind. Others expressed the perception that technology simply was not on their radar.

Positive and Negative Perceptions of Being Located in Surrey

Respondents were overwhelmingly positive about being located in Surrey. There were very few negative comments received by the study team. The vast majority cited the favorable comparison in cost of living between Vancouver and Surrey, adding that the proximity to Vancouver was a very positive attribute. Also:

- Another significant positive attribute identified by a large proportion of respondents was the efficient transportation infrastructure (including public transit).
- The availability of labour was seen as a positive attribute as well. In addition, the diverse nature of the population in Surrey and its large and growing number of immigrants were largely viewed as positive.
- Among the negative perceptions were references to high profile crime, especially drug- and gang-related. In addition, there were some negative comments made about land costs, taxes and the municipal political system.

Workforce Issues and Challenges

The employer responses range from no labour/skill shortages or difficult-to-fill vacancies to experiencing significant shortages/vacancies, some both low-skilled and high-skilled shortages simultaneously. Very few employers are experiencing no shortages or difficult-to-fill positions; it was more a matter of degree of shortages in talent supply. Employers with no shortages tend to be either very large companies that are able to attract and tap into various talent pools or small companies that only need to fill small numbers of positions and rely on internal, on-the-job training for low to mid-skilled positions.

The nature of skill gaps tends to be sector-specific and vary by employer interviewed. Shortages or vacancies tend to be in a combination of specific lower and higher skilled/qualified occupational categories.

In terms of attraction and recruitment challenges for Surrey employers interviewed, consistent with the patterns in shortages/vacancies, employers' perceptions varied as to whether they have any challenges in this regard or in the degree to which it is a problem. In terms of retention/attrition issues, Surrey employers interviewed also were on a continuum from no problem, to minor challenges to major and sometimes chronic retention issues.

In terms of the future, generally most Surrey employers interviewed expected shortages/vacancies, attraction/ recruitment and retention challenges to increase based on a number of factors.

Workforce Education and Training

Of the 31 employers interviewed, in terms of hiring high school graduates, ten do not, seven hire few and thirteen do often (one was not sure). Only a few employers explicitly identified participating in high school work experience, co-operative education or high school apprenticeship programs or partnerships. Among employers, only three do not recruit from post-secondary programs, five do this infrequently or to a small degree, and the majority, 23, do so regularly. Approximately half of the latter mentioned co-operative education, work-study and internship programs.
Another pattern was that many of those employers who did not hire at all or very little from high school or post-secondary programs are increasingly trying to tap into temporary foreign workers, newcomers, refugees and other international options.

The size of the organization and the extent to which it employs skilled workers and those with specialized skills drive whether or not employers conduct internal and on-the-job training.

Probability of professional development opportunities existing were influenced by employer size (larger more likely) and employers who employed management and professional workers that required regular updating and/or career development to progress in employees' career paths.

Many employers emphasized the importance of general work competencies such as essential skills, life skills, positive attitude, punctuality and reliability, etc. Further, in terms of identified shortcomings or gaps in K-12 and post-secondary education and training, employers identified a few specific areas.

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Other Labour Supply Sources

The most prevalent labour force groups tapped into by the Surrey employers interviewed were internationally trained workers (e.g. newcomers, temporary foreign workers, international students) and women. Correspondingly, many of the employers commented on their organizations being ethnically and gender diverse.

Tapping into diverse talent sources cross employer size and sector, indicative of the diversity of the broader Surrey and Metro Vancouver workforce and of some of their positions being more attractive to women. A number of employers commented on employing workers from several ethnic communities.

Overall, the Surrey employers interviewed reflected varying degrees of diversity in their workforces, many currently recruiting from various labour force groups and many realizing their organization needs to continue this and try to do more to a) address their talents needs; and b) be representative of the broader Surrey labour force and population.

Labour Market Policy Actions

Respondents had some difficulty with this question and some required clarification on what type of information was being sought. A significant number of interviewees expressed views on immigration policy, access to visas, the need for better, more streamlined access to skilled immigrants, language supports, etc. Another area that elicited strong opinions was the lack of easy-to-use, accessible public training programs and training supports targeted a employers and workers.

Other issues

Employers identified few promising practices in attraction, recruitment and retention, with a small number of ideas surfacing.

Implications

Based on what we heard from employers who were interviewed and the key themes that emerged, the main implications for further research through focus groups and for the eventual Surrey Workforce Strategy that is developed in this project are:

1. Competition among employers for skilled workers will likely become increasingly intense as businesses grow. Growth will be hampered without interventions aimed at increasing the supply of workers with appropriate skills, motivation (including loyalty, initiative, willingness to alter unrealistic expectations for high wages, access to transportation and affordable accommodation.
2. Technology will impact the workforce in a number of ways, particularly in industries that are data-driven and in production/manufacturing environments where automation can be introduced or enhanced - and managed efficiently.
3. Surrey's location will, on balance, continue to be attractive when compared to neighbouring Vancouver in terms of affordability, transportation and opportunities for growth. Given the likely increase in labour force demand, Surrey will continue to offer an expanding mix of employment opportunities on the supply side.

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4. Employers will experience varying levels of shortages in workers across the continuum from low-skilled to high-skilled occupations. No industry or occupational group will be immune to this reality and the effects will be felt in different ways.
5. Businesses identified a number of existing and potential labour sources including high school and post-secondary graduates however skill gaps requiring additional formal and on-the-job training remain as barriers to hiring 'right out of school'. Opportunities exist for better workplace exposure options for students.
6. International immigrants and equity-seeking groups are seen as generally positive sources of workers however employers repeatedly mentioned the importance of being able to find the 'right' fit in terms knowledge, skills and experience – regardless of the source of labour supply.
7. Surrey businesses expressed concerns about a lack of good, current information on labour force development initiatives and other supports. Those who identified specific policy improvements focused on high profile programs like the limitations of the Temporary Foreign Worker initiative and barriers that prevent or inhibit the efficient inflow of skilled workers in high demand occupations.
8. There were limited recommendations on public policy options that would help Surrey employers address their workforce challenges. This was further investigated during the focus group sessions.
9. Employers had relatively few examples of successful workforce practices that could be introduced, expanded or built upon to help Surrey employers with workforce issues. In future focus groups, this could be investigated in the form of – instead of promising practices – identifying critical success factors for a workforce strategy that would truly help Surrey employers.

Focus Group Findings

This summarizes the results of three focus groups (FGs) – the third of three elements in the primary research phase of this project. The focus groups were held June 25, 26 and 27, 2019, at the SBOT Boardroom. Twenty-three Surrey-based employers and other stakeholders participated in these facilitated sessions to achieve the following outcomes:

1. Validate key themes from previous project research;
2. Address any information gaps in previous research;
3. Probe deeper into key workforce challenges and potential solutions; and,
4. Obtain advice for developing a Surrey Workforce Strategy.

The FGs were facilitated by HCS and participants were invited by the SBOT during the previous two weeks. The first two FGs were for employer representatives and the third one including other stakeholders (local government, education, post-secondary education, service providers, etc.) and First Nations representatives. After confirmation of their participation, SBOT sent FG participants an agenda, questions and backgrounder in advance of each session.

Methodology

Facilitated discussions in each focus group session followed a process that allowed participants to introduce each other and briefly explain their respective roles and their organization.

Participants were asked to independently consider the single-most significant labour force challenge facing employers in Surrey. To do this, participants were given a couple of minutes to consider their responses.

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inclusive | innovative | independent

Then, the facilitator ensured that each participant's response was captured on a flipchart. In some cases, participants identified more than one challenge. All responses were recorded.

The facilitator limited discussion of the issues and side conversations were closed down during the list-building process in order to keep the ideas flowing and the session on track – given the limited time available.

Once all responses were recorded (typically 12-15), the facilitator revisited the list with the group to ensure that all participants understood the issues and that any duplicates were eliminated from the list, (i.e. the phrase "attraction and retention" was mentioned two or three times during the discussion. That phrase was listed only once on the final list). The next phase of the process involved prioritizing the list of challenges.

Employer Focus Group #1 – June 25, 2019

See Appendix E for participant list and Appendix F for discussion questions.

Prioritized Challenges

1. Attracting Talent

   Surrey is an attractive area to establish or relocate a business from higher cost centers, such as Vancouver. Nevertheless, the city is challenged attracting the necessary talent across most industries, largely due to the increasing cost of housing and a lack of amenities that are needed to attract talent, particularly younger workers. The city of Surrey needs to distinguish itself from other municipalities in the region as a "go to" destination for living and working. Also, more emphasis needs to be placed on the value of trades training programming and the need to expand opportunities for students and apprentices within the system.

2. Recruiting Talent

   Related to the above is the challenge recruiting talent for specific occupations, particularly in trades, technical and professional occupations. With Surrey's rapid growth, it is a highly competitive market for talent. Expanding education and training programming in Surrey-based institutions is seen as one approach to addressing this challenge. Companies cannot always compete on wages and benefits alone and relies more so on the value of work and career opportunities within the organization to help retain workers.

3. Retaining Talent

   Given low unemployment levels across the region, competition for talent is intense in Surrey and surrounding municipalities. High demand workers are often pursued by other companies offering better wage and benefit packages. Retaining high-end talent in Surrey is often more difficult than in surrounding communities, such as Vancouver. Also, retaining talent is easier in unionized environments, but attracting and recruitment new workers is still challenging.

Prioritized Solutions

1. Education and Training for Youth Strategies and Tactics

    - Enhancing "career days" for youth to better understand work opportunities across industries and occupations (not just at their parent's workplace).
    - Building education programming in high schools on careers, expectations and the importance of work ethic.
    - Instituting mentorship programming at the workplace for new recruits.
    - Raising awareness of STEM (Science, Technology, Engineering & Math) programming, including the trades, in high schools, and the many opportunities that stem from it.
    - Establishing stronger interrelationships between employers and high schools, not just at the post-secondary level.

2. Attraction to Surrey Strategies and Tactics

    - Strengthen relationship between Surrey community and corporate leaders to enhance the development of Surrey as a place to live and work.
    - Highlight the cost benefits of working and living in Surrey, as compared to other jurisdictions.
    - Promote Surrey attractions, (e.g. "go to") highlighting the social, recreational, cultural amenities of the city.
    - Celebrate Surrey's diversity through cultural and social events.
    - Build a "value based" experience, (i.e. health, happiness, family, environment, etc.) for living and working in Surrey.
    - Long-term, continue to enhance Surrey's transportation infrastructure making it both affordable and accessible to all.
    - More effort is needed by government and educators to help promote the trades and motivate youth to pursue opportunities in trades and technical occupations.
    - Better communication and awareness of employment opportunities in technical fields is needed especially at the secondary school level.

3. Recruitment Strategies and Tactics

    - Build a "one stop" interface between employers and job seekers, versus the plethora of sites currently available.
    - Could be designed around the concept of "trivago" that consolidates all jobs and job seekers available through participating sites.
    - Take greater advantage of industry associations for bringing together job seekers and job opportunities by sector.

4. Retention Strategies and Tactics

- Meaningful work more important than pay & benefits
- Need to build greater sense of community within the work environment.
- Opportunities for worker interaction both at work and outside of work becoming more important (team building).
- Promoting healthy living, including the use of wellness providers at the workplace, (e.g. physio, massage, yoga, other therapies) helps work-life balance.
- Employee ownership (where applicable) promotes motivation and retention.
- In the financial services industry, opportunities for professional and career development are most important for the retention of workers.

Employer Focus Group #2 – June 26, 2019

See Appendix E for participant list and Appendix F for discussion questions.

Prioritized Challenges:

1. Transit and parking issues

   Employers vary in terms of the extent to which transportation for workers is an issue for them. For some, it is a function of employer proximity to the Skytrain and major bus routes. Surrey is over 20 kilometers wide and long at its perimeter, so even living in or adjacent to Surrey does not guarantee accessible transit. In some areas of the community, there may be bus routes close by an employer premise, but the transit schedules do match the work schedule, (i.e. early/late starts/stops, multi-shift workplaces, etc.). For those workers who have vehicles and travel to work from within or outside Surrey, depending on the workplace location, they may not have adequate and/or accessible, (i.e. affordable) parking. With pressure on building for commercial and residential use making space a premium, density and workforce volumes are not necessarily matched workforce parking.

2. The lack of a central hub

   While parts of Surrey like Central City are increasing residential and non-residential density and creating hubs for businesses and sectors, as a whole Surrey is not 'the sum of the parts is larger" city yet. The necessary breadth and depth of residents, businesses and workforces is not in place to create critical mass, information-sharing, collaboration and a 'community' of practice; and to attract other businesses and workers into Surrey. Creating bigger and more dense community spaces can facilitate better matching of employers and workers and create 'clearinghouses' to share information and resources for workforce development.

3. The shortage of skilled labour

For many employers, the lack of the existence of skilled labour in or near Surrey is a challenge. This is particularly true in skilled trades, (e.g. construction), technical positions, (e.g. skilled machine operator) as well as technology workers, (e.g. software, animation, etc.). Also, professionals such as qualified teachers are in short supply in Surrey; and professions with shortage like engineering and health care are hampered by have a supply of foreign-trained professionals in Surrey whose credentials are not recognized and cannot be applied. English workplace language skills are also lacking among some newcomers who would otherwise be employable and productive.

Prioritized Solutions:

1. Transit and Parking Strategies and Tactics

- Involve industry in transit planning
- Launch a park-sharing program
- Adjust transit schedules to address the needs of certain larger employers
- Foster and support tele-work opportunities
- Mimic models such as the Microsoft corporate transit service
- Re-think the existing bike lane program
- Encourage ridesharing
- Increase safety and security on and around public transit

2. Central Hub Strategies and Tactics

- Determine and publish the City of Surrey's long-term vision so business can plan accordingly
- Foster greater professional collaboration through SBOT initiatives
- Conduct a survey of employers to gather and gauge data on wages, benefits, and valuable Labour Market Information
- Study long-term implications of the costs to produce skilled workers
- Create virtual hubs for similar businesses
- 'Open up' available data
- Open dialogue between SBOT and employers – more 2-way communication

3. Skilled Labour Strategies and Tactics

- Create an association/organization that provides basic training on job readiness, (e.g. getting and keeping a job, professionalism, etc.)
- Support skilled immigrants with enhanced immigration, recognition of credentials, simplified visas, etc.

- Measure skills gaps and build realistic solutions
- Employers should increase their expectations of employees, (i.e. no sugar-coating of performance requirements)
- Revisit the Red Seal trades certification process
- Focus on converting existing skills to meet new requirements rather than starting from scratch
- Return to an 'Employment Agency' model as a source of workers
- Education system must better prepare graduates for work, (e.g. basic business training)
- Educational institutions should focus more on employer-driven (not student-driven) programs
- Recognize foreign credentials more efficiently
- Simplify immigration for skilled talent

Stakeholder Focus Group #3 – June 27, 2019

See Appendix E for participant list and Appendix F for discussion questions.

Prioritized Challenges:

1. <u>Affordability of housing, transit, daycare, etc.</u>

   Affordable housing, transportation, childcare and other supports were identified by stakeholders as significantly contributing to developing a Surrey workforce. This is particularly true for low-income workers, recent post-secondary graduates who do not earn a 'living wage.' Newcomers who migrate here and students who graduate in Surrey cannot afford to stay in the community. In addition to low wages for certain workers, many do not have basic employee benefits to supplement their hourly wage. While housing in Surrey is less expensive than in Vancouver and adjacent communities, it is still relatively high and certainly higher in communities east of Surrey – so it can be difficult for employers to draw workers from Abbotsford, Chilliwack, Maple Ridge.

2. <u>The gap between labour supply and demand</u>

   A gap or mismatch exists between people with the skills that employers need and can attract on one hand, and the skills and interest that is available in the Surrey labour force is manifested in different ways. This is partly and information gap in which some Surrey employers and some workers do not know what is available and what is needed. Sometimes the gap is recognition of credentials of internationally trained workers. Changing and increasing technologies in the workplace also create gaps for workers who do not possess the necessary new skills and knowledge. Stakeholders also identified some specific occupations in which there were gaps in supply of qualified workers, particularly in various trades, technologies and professions; and in high-skilled manufacturing occupations. A labour market gaps was also identified in the need to better prepare and connect employers with Indigenous people, members of visible minorities, persons with disabilities and others underutilized in the Surrey and other labour markets.

3. Lack of policies and programs to support the workforce

Generally, stakeholders believe that all levels of government should provide more and innovative supports for workforce development in Surrey. This ranged from ensuring professional regulators being more flexible and supportive of foreign credential recognition to addressing worker barriers to more health and social service infrastructure and programs and increasing awareness among Surrey employers about government funding for workforce development. Also, some stakeholders suggested governments should provide more help with connecting employers and underutilized jobseeker, particularly Indigenous people, immigrants and refugees and persons with disabilities.

Prioritized Solutions:

1. Affordability Strategies and Tactics

- Create 'livable' communities where residents can learn, work and live
- Improve access to education and training at low or no cost
- Introduce a 'buy local' campaign
- Ensure a living wage
- Conduct a compensation/competition survey and gather other and distribute Labour Market Information
- Adopt a 'people before profit' model

2. Bridging the Gap Strategies and Tactics

- Advocate and support skill building and government leadership on issues including CBA, access to training, labour force strategies for indigenous, immigrant, and equity-seeking populations
- Match skills training and education to the needs of employers
- Offer upskilling and retraining free of charge
- Make better use of existing resources
- Create paid mentorship programs
- Involve employers in the design of training programs

3. Public Policy and Program Strategies and Tactics

- Create procurement policies that reflect indigenous, immigrant and underrepresented groups
- Collect and disseminate Labour Market and other information for employers
- Encourage the City of Surrey to obtain 'Living Wage Employer' status
- Offer additional supports to small business

- Offer 'discovery' programs to expose students and others to a mix of training and occupation options
- Create an association representing the large population of urban indigenous workers
- The City of Surrey should offer services commensurate with the size of the city – especially as it grows.

Overall Conclusions

This secondary and primary research report has identified and substantiated a number of key workforce trends, the influences on or drivers of these trends and the needs of employers, service deliverers and labour force participants in Surrey in order for effective labour market functioning in BC's fastest growing and soon-to-be largest city.

A number of themes and findings were uncovered through the literature review that informed the primary research and eventual strategy development.

The economic and labour market analysis showed evidence of a strong Surrey economy and labour market supported by significant population growth and diversity, with key growth sectors, occupations and skillsets identified.

This review also identified a rich amount and types of education, training and employment programs and services in Surrey which can play a key role in supporting the development and implementation of the eventual Surrey Workforce Strategy.

An overriding theme – thus the need for this project – is a lack of Surrey-specific labour market data. Another challenge uncovered in our literature review is a dearth of information on promising practices that are directly and significantly applicable to the Surrey labour market.

From a synthesis of the large amount of research conducted for this Project, a number of labour market demand/supply issues emerge for consideration in the development of the Surrey Workforce Strategy:

- Labour Demand Issues/Needs
    - The need to better identify and respond to critical vacancies among Surrey employers on an ongoing basis.
    - Flexible, innovative and yet practical ('Surrey unique') solutions to Surrey employer talent attraction and retention challenges.
    - Understanding and educating all Surrey labour market partners (including young people) on the impact of automation and other technology on workforce demand and supply.
    - Identifying and supporting key Surrey growth sectors in recruiting, attracting and retaining talent.
    - Encouraging Surrey employers to engage with all potential talent pools or as many as possible.

- Surrey employers and Surrey (as a whole) needs to work together on attracting talent, showing a strong value proposition to job-seekers vis-à-vis employers in competing communities and regions.
- Promoting (as a whole) Surrey's strengths to attract and retain talent and influencing levels of government and others to improve infrastructure, amenities and policies and programs.
- Many Surrey employers need access to resources (i.e. information, tools, best practices, etc.) to increase their capacity for talent attraction and retention.

- Labour Supply Issues/Needs
    - Enhancing the readiness and utilization of unemployed and underemployed/underutilized workers in Surrey, including those members of underrepresented labour force groups.
    - Working with Surrey education and training providers to deliver flexible, relevant job-specific skills training, especially in advanced manufacturing, technology and trades.
    - Increasing Surrey employer awareness and recruitment of persons with disabilities and Indigenous people.
    - Enhancing and better coordinating training and employment services for newcomers and refugees, including easier competency recognition and sector-specific English language training.
    - Better preparation of and connection with employers for K-12 and post-secondary students in Surrey for the world of work.
    - Improved coordination and integrated connections with Surrey employers among Surrey service providers.

- Labour Demand/Supply Issues/Needs
    - More accessible, timely and reliable Surrey-specific labour market information (i.e. demand, supply, gaps).
    - Local (Surrey) joint labour market and workforce planning among labour market partners focused on adapting regional, provincial and federal strategies, programs and cases to the Surrey workforce needs.
    - Greater cohesion, information-sharing on 'one-stop' approaches among employers and education and service providers and government agencies on workforce solutions in Surrey
    - Stronger, sustainable mechanisms to keep Surrey employers connected with K-12 schools and post-secondary institutions and to enable two-way information sharing and input.

Further, in analyzing this research for the Surrey Labour Market Priorities Project, three key concepts emerged that were central to the development of the Surrey Workforce Strategy:

1. **Improving labour market demand-supply connections and addressing gaps** – Strong, clear linkages are needed among Surrey employers, providers of education, training and workforce services in Surrey and Surrey labour force participants. These more reliable connections are needed in order to increase the supply of qualified, motivated and employment ready graduates and other job seekers to support the productivity, competitiveness and growth of Surrey businesses.

2. **Improving the functioning of the Surrey workforce ecosystem** – The recognition of a workforce ecosystem and the interrelationships among its entities and the drivers and factors that influence it and/or are influenced by it need to be reflected in a Surrey Workforce Strategy.
3. **Improving the readiness and utilization of the Surrey labour force, particularly members of underrepresented groups** – Surrey employers and industry groups call for enhancements in the preparation for work of high school students, post-secondary students and unemployed or underemployed job seekers. At the same time, employers need awareness, information, support and better coordination among service providers in order to increase the quality and quantity of their hiring, onboarding and retention of members of underutilized and underrepresented labour force groups.

Better connections among Surrey labour market partners – namely employers, employees, labour force participants and service deliverers – are a central part of the Surrey Workforce Strategy. Also, the Strategy will provide support and encouragement for these partners before, during and after the beginning of employment.

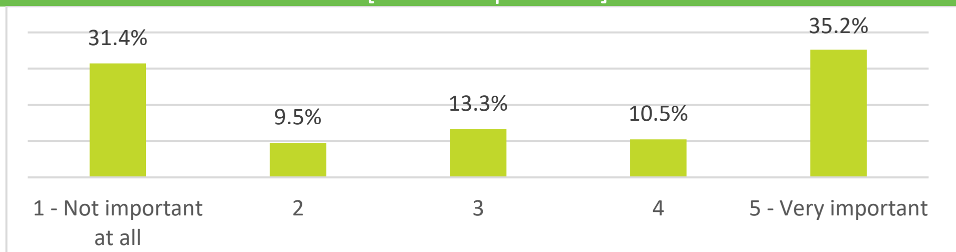
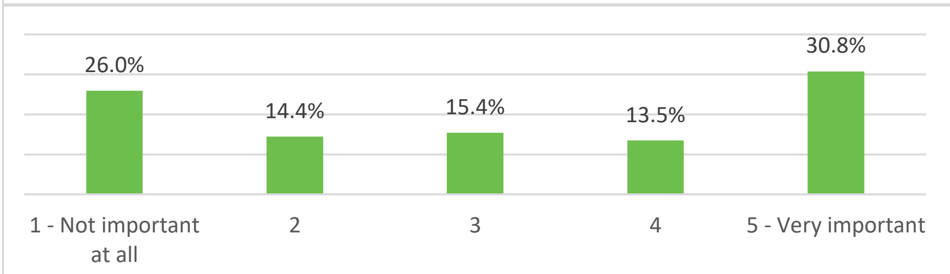
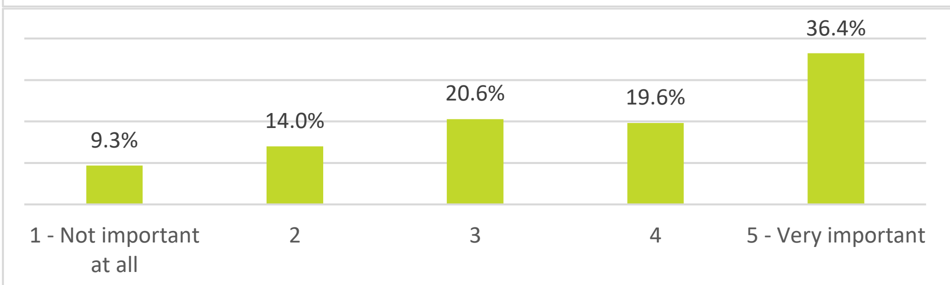
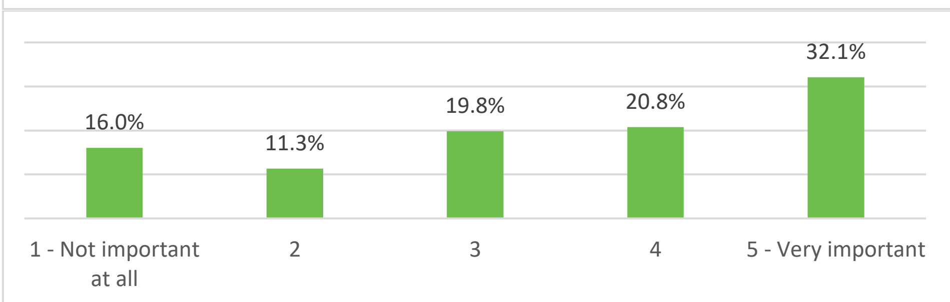
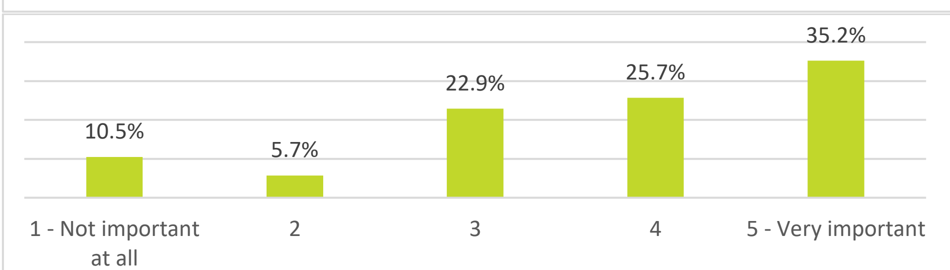
This concept of a workforce ecosystem also reflects the importance of a Strategy needing to involve influencing major drivers, community infrastructure, community amenities and local and senior government policies that do and/or will affect workforce development and talent attraction and retention in Surrey.

The specific and detailed implications of the extensive secondary and primary research undertaken in the Surrey Labour Market Priorities Project are clearly and directly reflected in the strategic context, strategic direction, strategic priorities and tactics and implementation of the Surrey Workforce Strategy.

Sincere thanks to the almost 200 voices the Project heard from and for the previous research and information gathered during this Project over the last eight months.

APPENDIX A - Detailed Results: Attraction, Recruitment & Retention

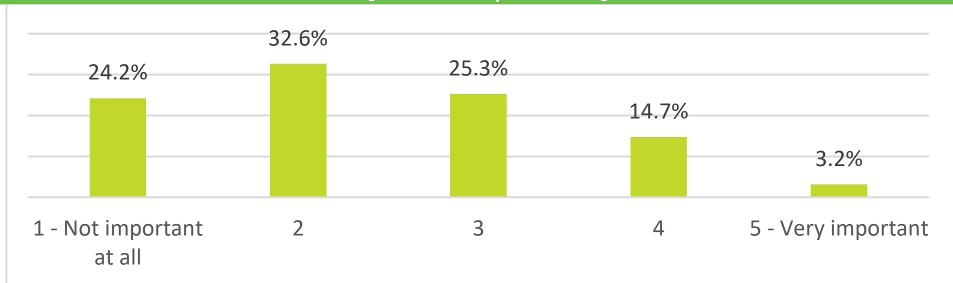
Source of Workers (Q8)

Q8. Source of Workers	Result [Scale – Importance]
High School (N=105) Mean (3.09)	
Industry Training (N=104) Mean (3.09)	
Colleges & Inst. (N=107) Mean (3.6)	
Universities (N=106) Mean (3.42)	
Other Companies in Industry (N=105) Mean (3.7)	

Q8. Source of Workers	Result [Scale – Importance]

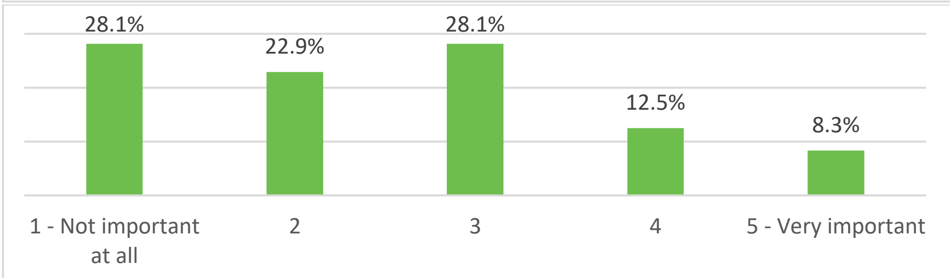
Other Industries (N=95)

Mean (2.4)



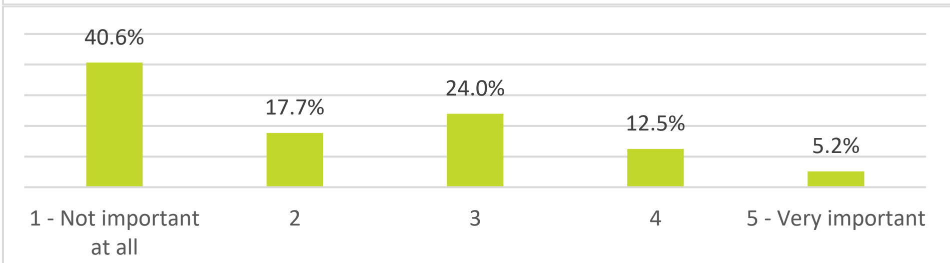
Other BC (N=96)

Mean (2.5)



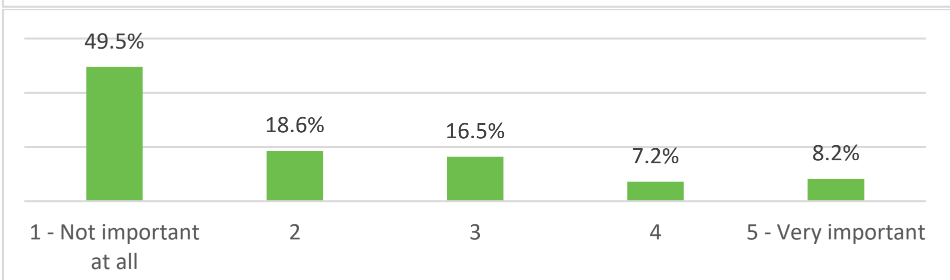
Other Provinces (n=96)

Mean (2.24)



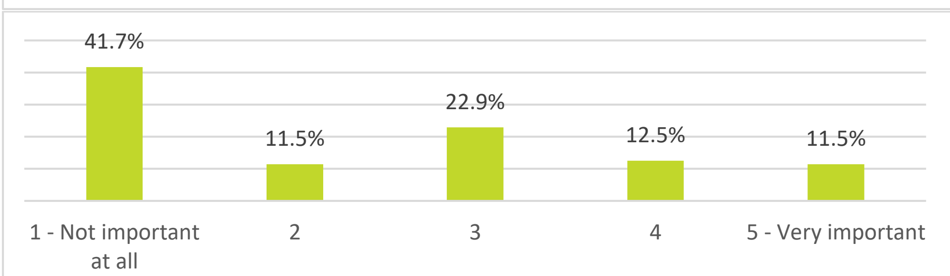
Other Countries (N=97)

Mean (2.06)



Other Sources (N=96)

Mean (2.41)



[Comment]

Comments (<10) pertaining to other possible sources of labour tended to highlight the importance of advertising (e.g., social media, online) and the use of industry associations and employment agencies (e.g., DiverseCity). These comments would be more applicable to recruitment methods as per question 9.

"Very important] Advertising"
"besides ads on craigslist we have used Labour companies"

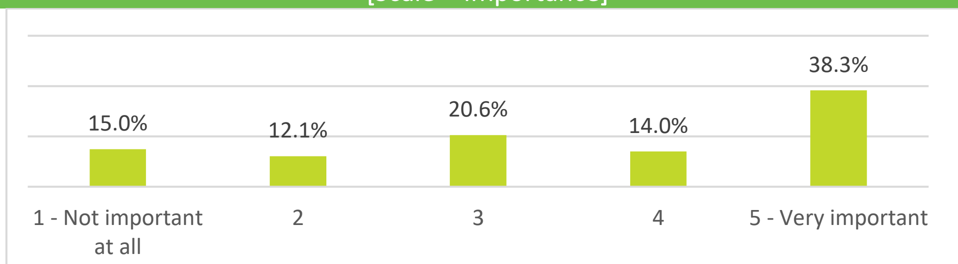
Q8. Source of Workers	Result [Scale – Importance]
	"work bc online job postings agriculture labour pool" “not for profit agency - Diversecity , PICS" "Not important at all] walk ins and referral""Social Media" "Most of our staff come from word of mouth and is a mix of students, employees looking for long term employment, and employees looking to fill a season of work" “Industry associations such as EGBC" "Online ad posts"

Methods of Recruitment (Q9)

Q9. Method of Recruitment — **Result [Scale – Importance]**

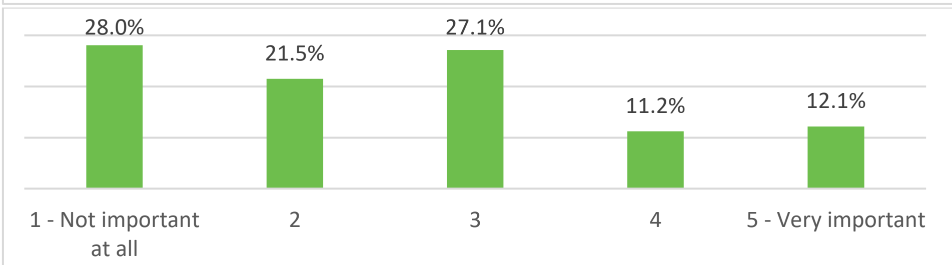
Job Boards (N=107)

Mean (3.49)



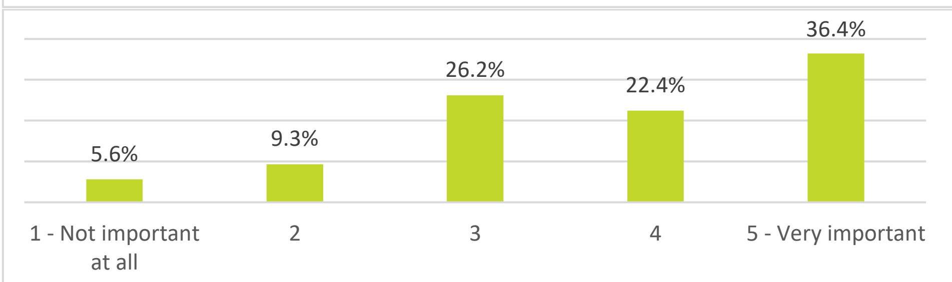
Job Fairs (N=107)

Mean (2.58)



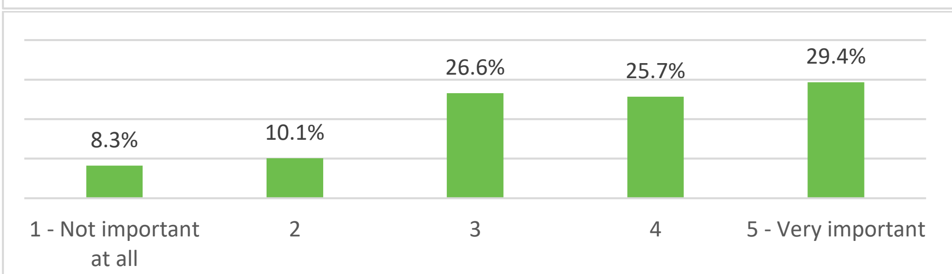
Recruitment Websites (N=107)

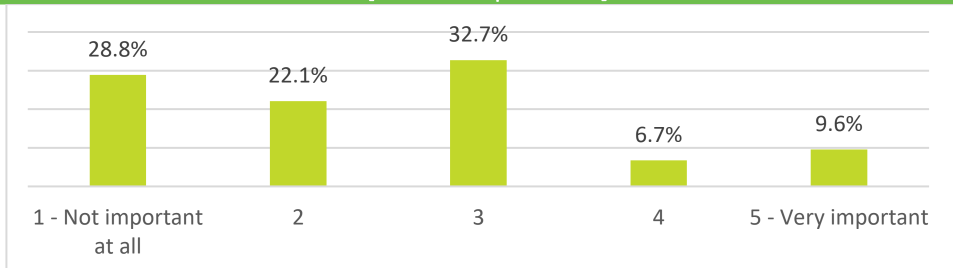
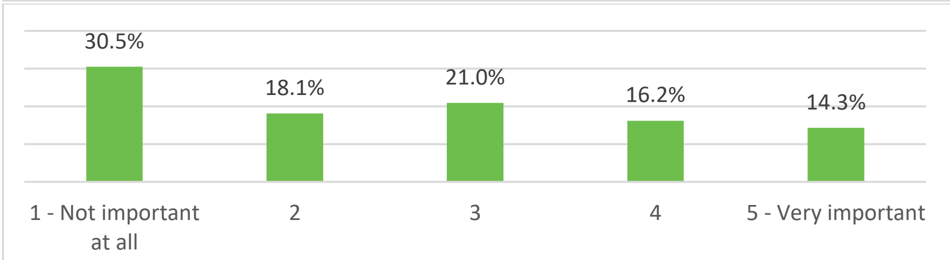
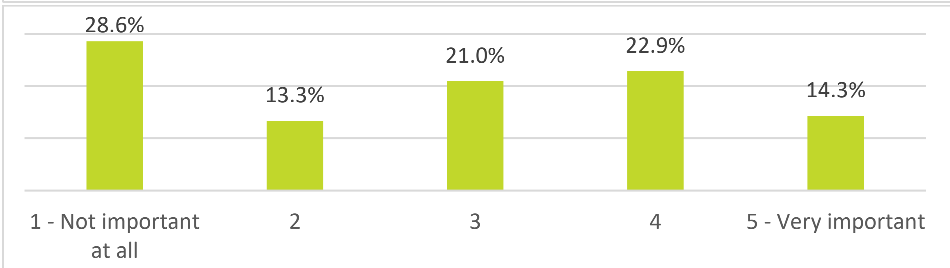
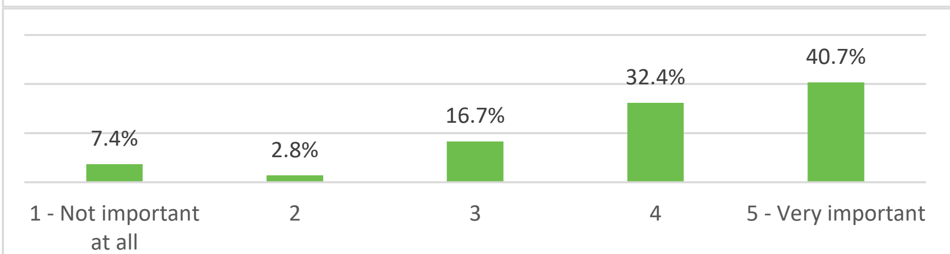
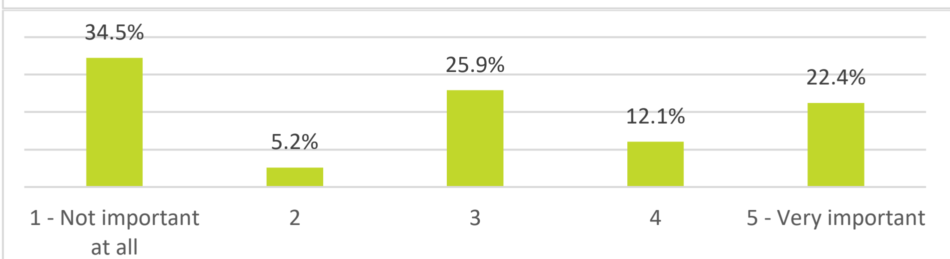
Mean (3.75)



Social Media (N=109)

Mean (3.58)



Q9. Method of Recruitment	Result [Scale – Importance]
Print Media (N=104) Mean (2.46)	
Employment Agencies (N=105) Mean (2.66)	
Recruitment Agencies (N=105) Mean (2.81)	
Employee Referral (N=108) Mean (3.96)	
Other Methods (N=58) Mean (2.83)	
[Comment]	Comments (>15)) pertaining to recruitment methods used by employers heavily emphasized the importance of “word-of-mouth” referrals vis a vis employee networks. Others also singled out other methods such as co-op arrangements and company websites. Dependence on “word-of-mouth” referrals would likely reflect smaller companies whose workforce needs are mostly lower skilled. “word of mouth and checking reference" "Have programs and incentives internallWord of mouth" "[4] word of mouth"

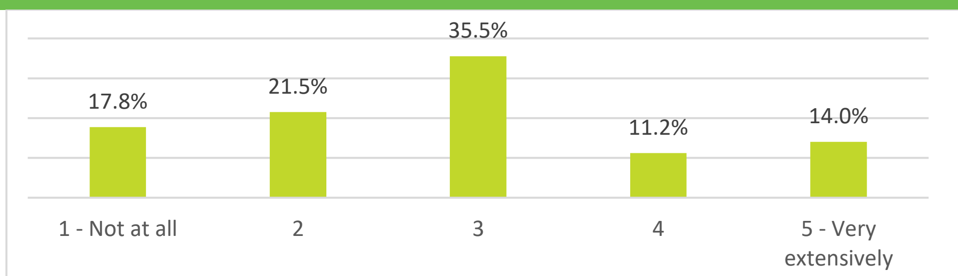
Q9. Method of Recruitment	Result [Scale – Importance]
	“internal referrals are usually the best "
	"Best candidates come from referrals"
	"Company website"
	"Co-op "
	"walk in "
	"Most important "
	"Word of mouth/referrals has been the best way of recruiting long lasting employees"
	“not applicable"
	"Referral"
	"Word of mouth and personal recommendation "
	"We rely heavily on employee and company networking for recruitment"
	"Word of mouth/networking"
	"Internal recruiters"

Employment of Individuals from Specific Labour Force Groups (Q10)

Q10. Specific Labour Force Groups	Result [Scale – Degree]

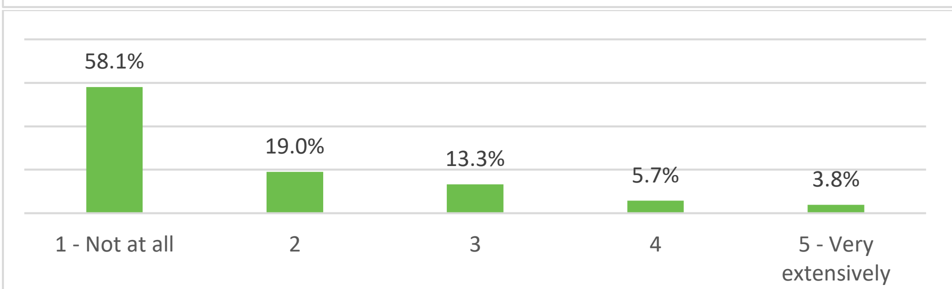
Permanent Immigrants/ Refugees (N=107)

Mean (2.82)



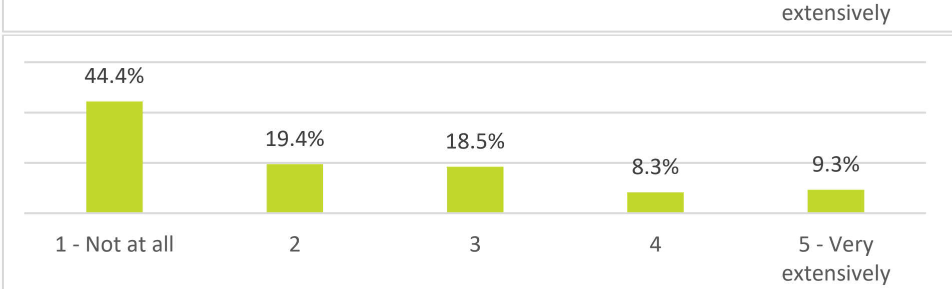
TFWs (N=105)

Mean (1.78)



International Students (N=108)

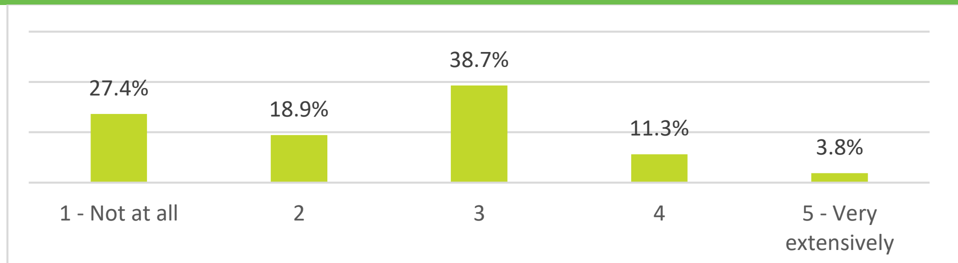
Mean (2.19)



Q10. Specific Labour Force Groups	Result [Scale – Degree]

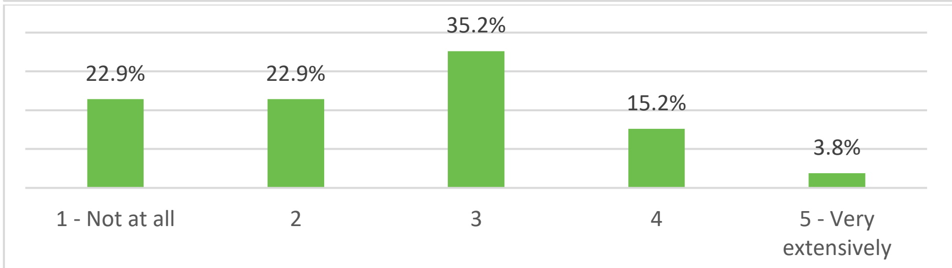
Indigenous People (N=106)

Mean (2.45)



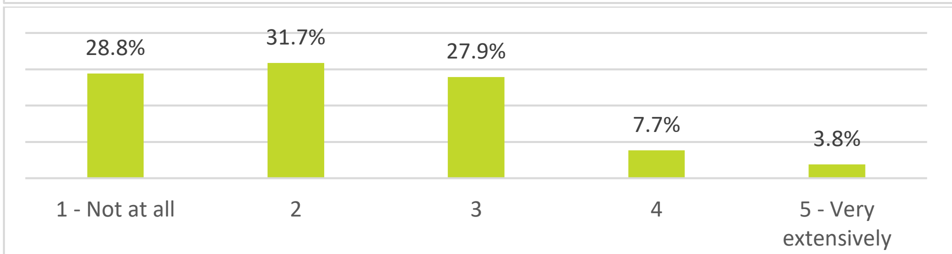
Older Workers / Retirees (N=105)

Mean (2.54)



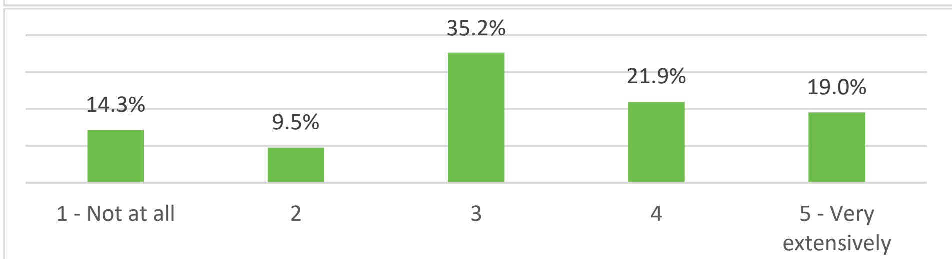
Persons with Disabilities (N=104)

Mean (2.26)



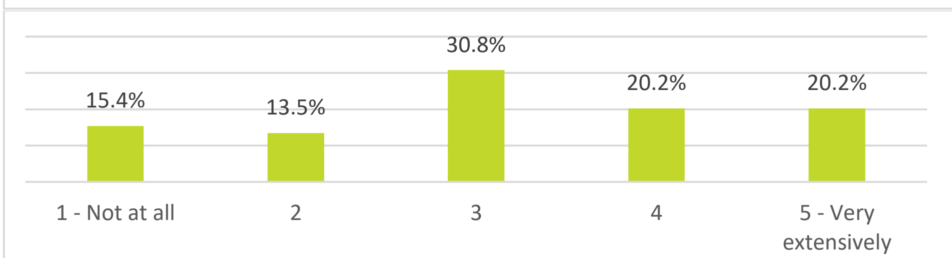
Visible Minorities (N=105)

Mean (3.22)



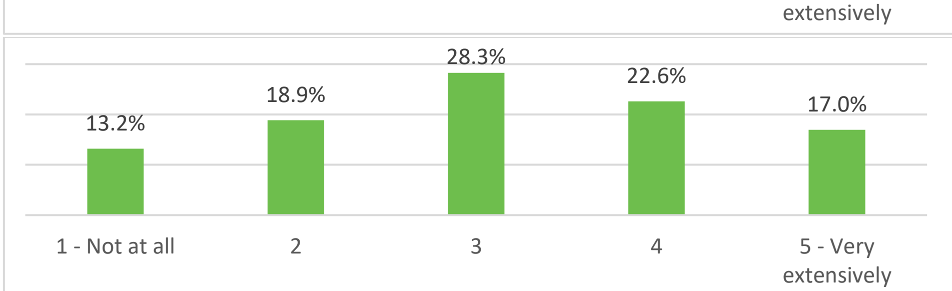
Women in U.R. Jobs (N=104)

Mean (3.16)



Youth (N=106)

Mean (3.11)

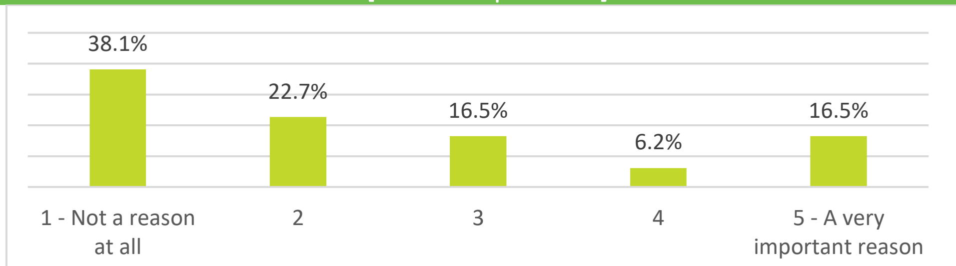


Challenges Recruiting New Workers (Q11)

Q11. Recruitment Challenges	Result [Scale – Importance]

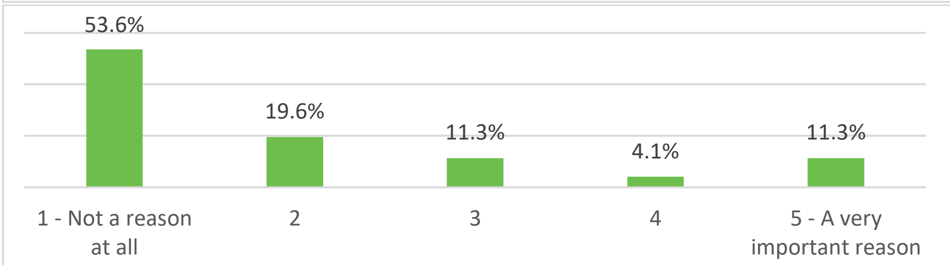
Literacy / Numeracy (N=97)

Mean (2.4)



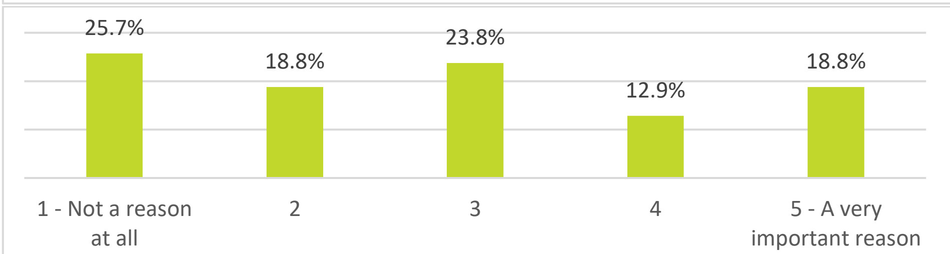
Incomplete High School (N=97)

Mean (2.0)



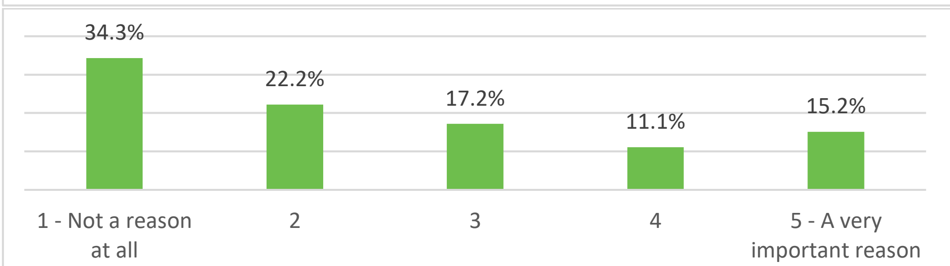
Inadequate Life Skills (N=101)

Mean (2.80)



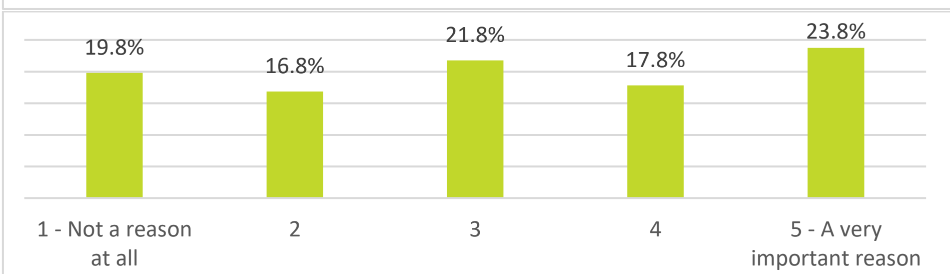
Inability to Work with New Technology (N=99)

Mean (2.51)



Inadequate Technical Skills (N=101)

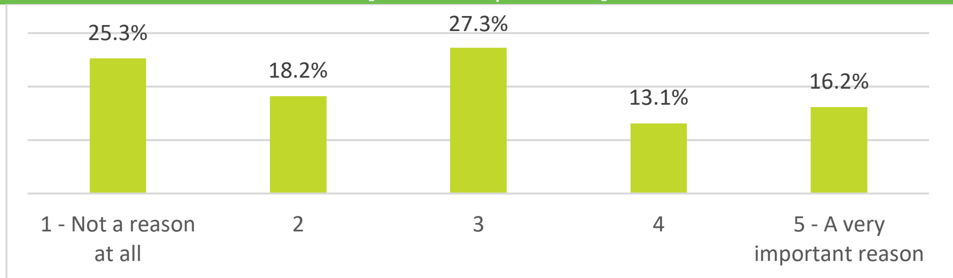
Mean (3.09)



Q11. Recruitment Challenges	Result [Scale – Importance]

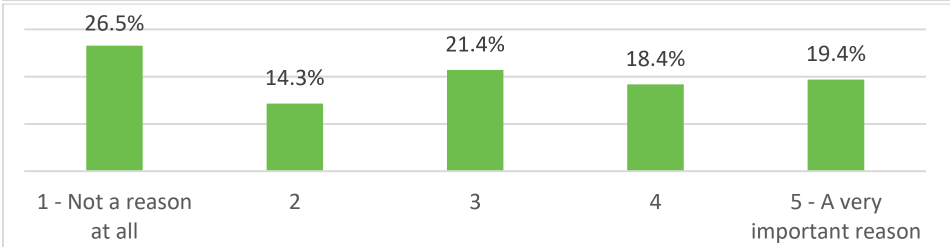
Transportation to / from Work (N=99)

Mean (2.77)



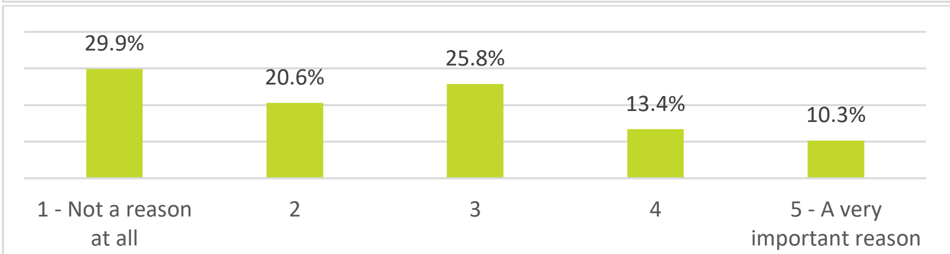
Affordable Housing (N=98)

Mean (2.9)



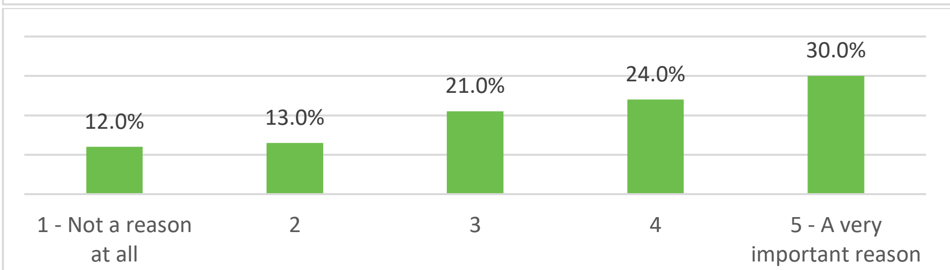
Child Care (N=97)

Mean (2.54)



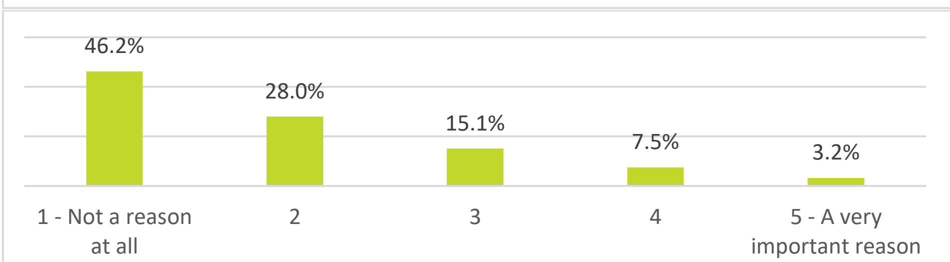
Professional Qualifications (N=100)

Mean (3.47)



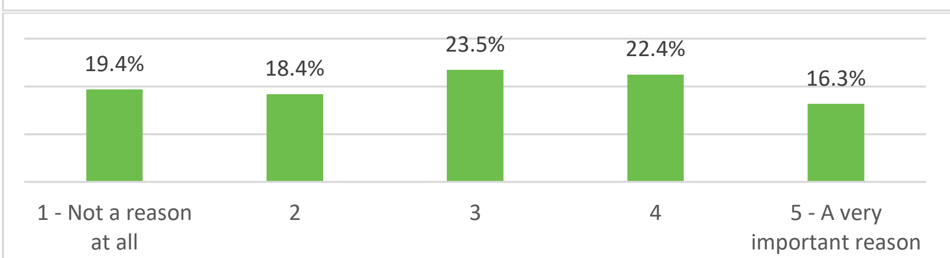
Health / Addiction Issues (N=93)

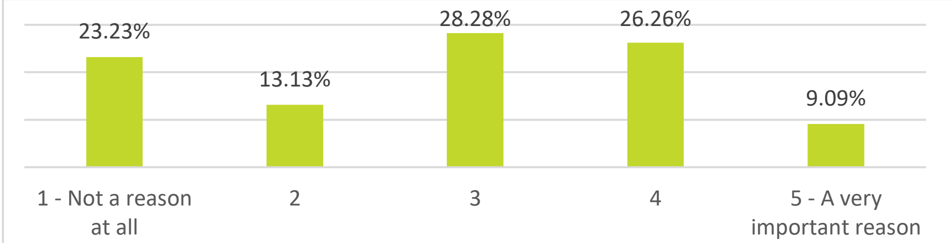
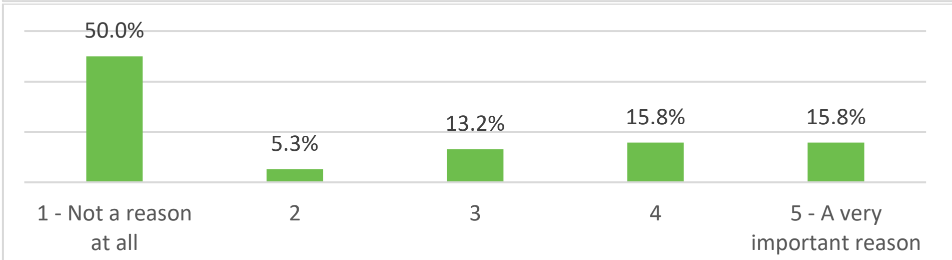
Mean (1.94)



English Language Skills (N=98)

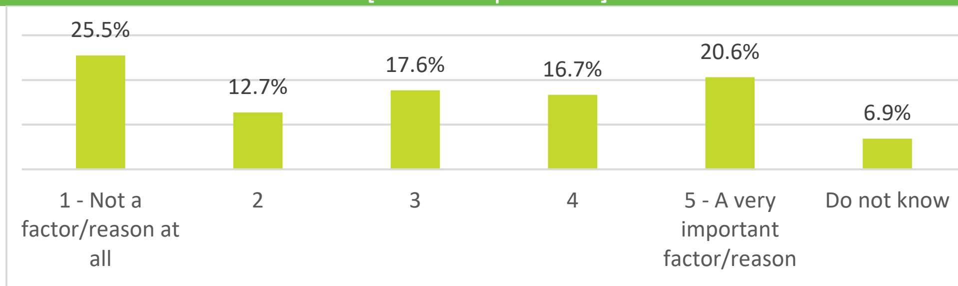
Mean (2.98)



Q11. Recruitment Challenges	Result [Scale – Importance]
Competitive Compensation (N=99) Mean (2.85)	
Other Challenges (N=38) Mean (2.42)	
[Comment]	Comments (>15) pertaining to recruitment challenges primarily centered around compensation, with several employers indicating difficulty affording more competitive wages while others indicating their compensation levels are competive. Other specific challenges included the shortage of skilled workers and a lack of a strong work ethic among the current generation. "Current generation not willing to work long hours" "highly competitive market e.g. candidates have multiple offers" "Shortage of skilled workers, very competitive market" "We are union shop, paying likely in top 5-10% competitively" "We currently compete with unionized workers doing the same work - NDP April 2018 gave union agencies much higher increase than non-union agencies doing same work" "We are still a small company and can't afford to offer the kind of wages for sales staff that they should receive." "we pay well over minimum, but not union, and with the high cost of living here, it's tougher" "agriculture labour jobs are labour intensive with low wages" "[Not a reason at all] we pay well" "bound by collective agreement wages" "Our salaries are driven by collective agreements and government directives." "Lack of specialized skills required for our unique work" "Work ethic (e.g., absenteeism. We hired and fired two persons after two-three months because they were absent 50% and 75% of the time respectively)." "[Not a reason at all] We are just working towards having enough financial resources to hire our first full slate of five (5) middle managers." "[Not a reason at all] We have no concerns hiring at our wage strucutre" "Surrey Location is too far from Metro Vancouver"

Challenges Retaining Workers (Q12)

<table>
<tr><th>12. Retention Challenges</th><th>Result
[Scale – Importance]</th></tr>
<tr><td>Accessible / Affordable Transportation (N=102)

Mean (3.15)</td><td>
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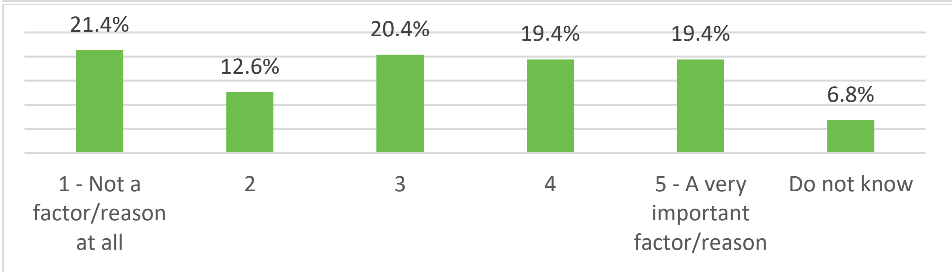
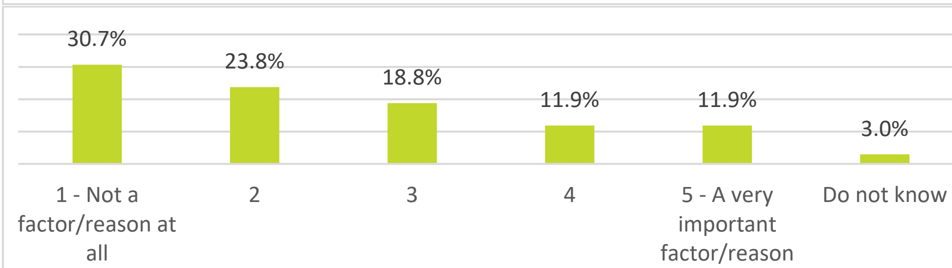
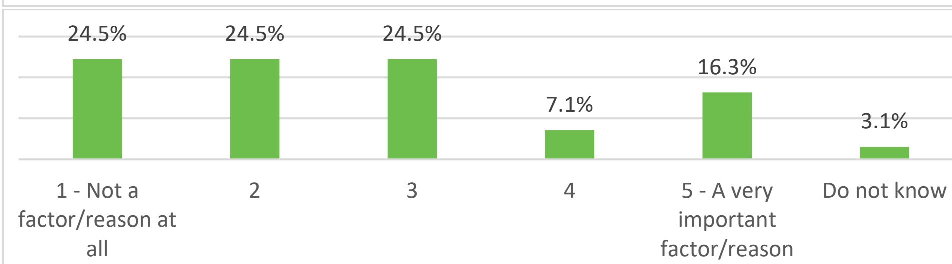
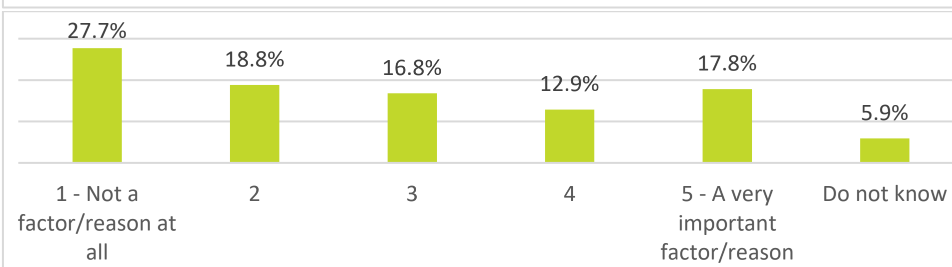
<tr><td>Affordable Housing (N=103)

Mean (3.23)</td><td>
</td></tr>
<tr><td>Workplace Supports (N=101)

Mean (2.59)</td><td>
</td></tr>
<tr><td>Ability to Adapt to New Technology (N=98)

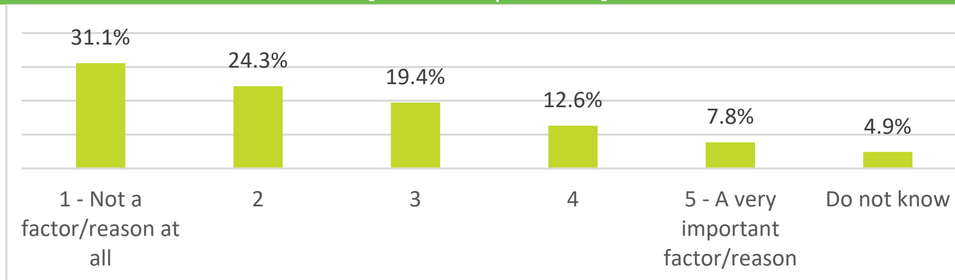
Mean (2.76)</td><td>
</td></tr>
<tr><td>English Language Skills (N=101)

Mean (2.92)</td><td>
</td></tr>
</table>

12. Retention Challenges | Result [Scale – Importance]

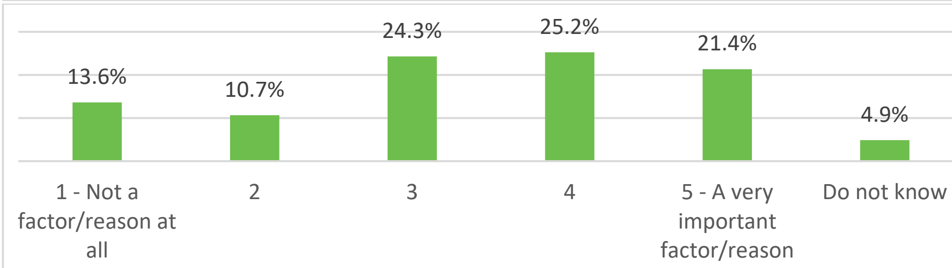
Cultural / Social Reasons (N=103)

Mean (2.56)



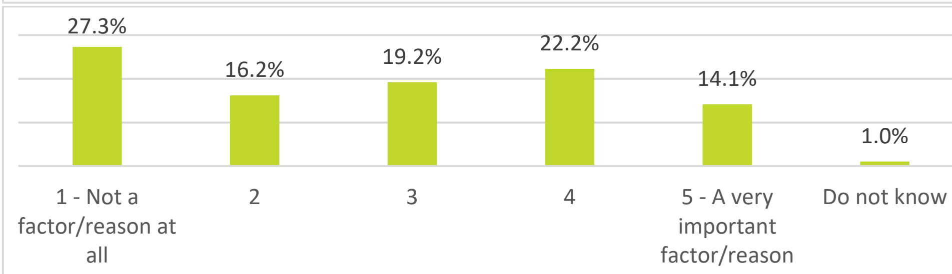
Salary / Wage Levels (N=103)

Mean (3.45)



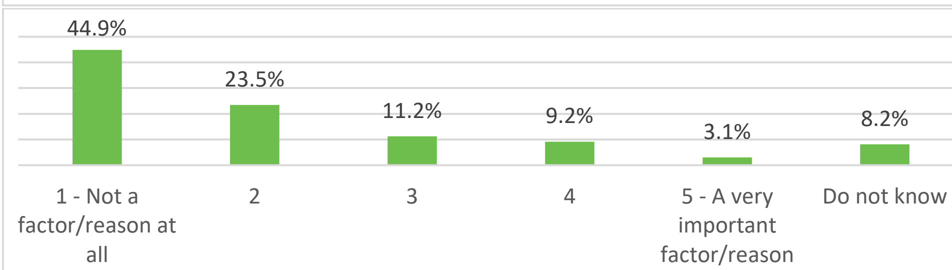
Employee Benefits (N=99)

Mean (2.83)



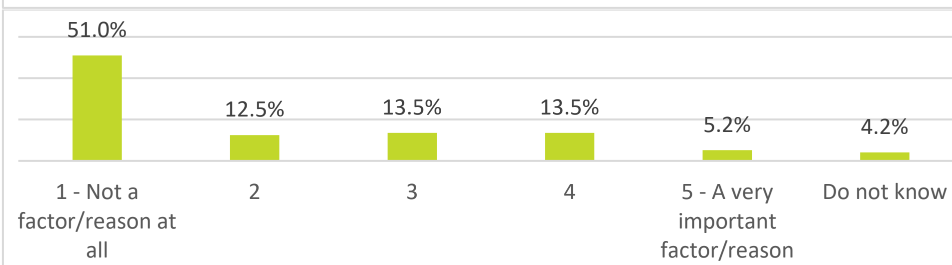
Health / Addiction Issues (N=98)

Mean (2.27)



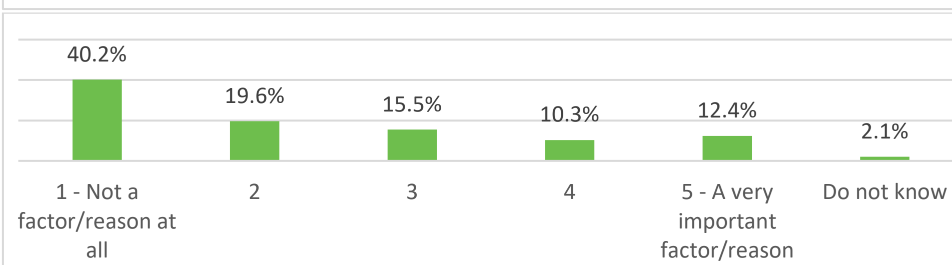
Seasonal Work (N=96)

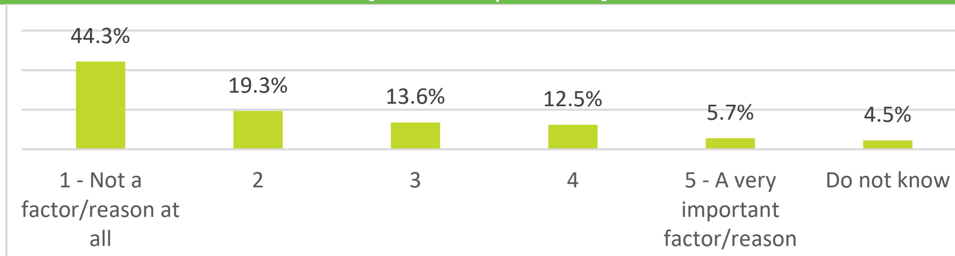
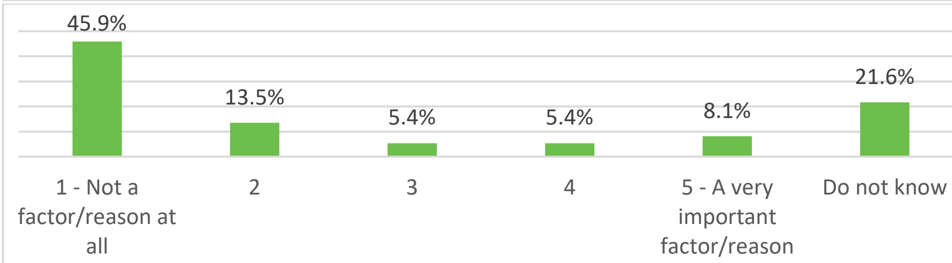
Mean (2.22)



Reliable Training Programs (N=97)

Mean (2.41)



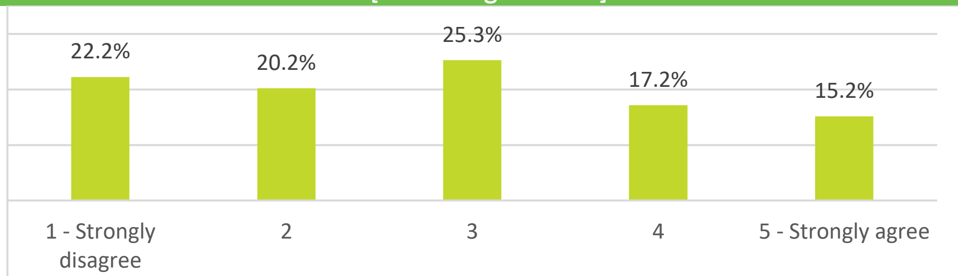
12. Retention Challenges	Result [Scale – Importance]
Working Conditions (N=88) Mean (2.3)	
Other Reasons (N=37) Mean (2.81)	
[Comment]	Comments (10) pertaining to retention challenges are mostly specific to an employer's individual circumstance. Issues, such as long commutes, childcare costs and turnover among casual workers, were identified, while several other employers commented on the lack of education programming in such fields as social work and wait times for apprenticeship (in-class) training. "Long out of town hours" "Cost of childcare, poaching from other organizations, burn out" "Apprenticeship programs very good, only a small % fail to complete" "there used to be 12 2-year programs in BC for Community Support Workers, now there are 3. Some are certificate programs 5 months at Sprott-Shaw, CDI but are inferior" "[Not a factor/reason at all] we offer training, it has not been an issue" "[A very important factor/reason] there are hardly any CSW certificate programs available; we are unable to compete with jobs in health and school system which pay more" "[A very important factor/reason] As a insurance broker, should be healthy, reliable, trust worthy, compliance, privacy and it is all commission based. if you working form bigger firm than you would salary" "Not a factor/reason at all] Other: Promotion or better offer (e.g. closer to home/higher job duties/better pay) comes along elsewhere" "BCIT/VCC APPRENTICESHIP PROGRAMS SOMETIME HAVE VERY LONG WAIT PERIODS FOR EACH LEVEL" "[Not a factor/reason at all] Everyone works casual somewhere else and you lose them when there is a permanent position."

K-12 & Post-Secondary Programming in Surrey and Lower Mainland (Q13)

Q13. Statement	Result [Scale – Agreement]

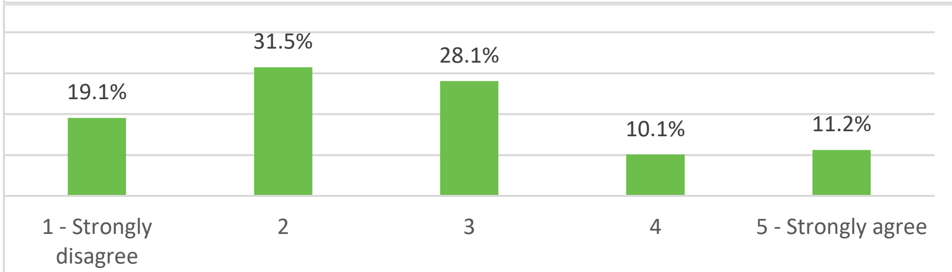
The K-12 system produces graduates that are ready for entry-level employment in Surrey. (N=99)

Mean (2.83)



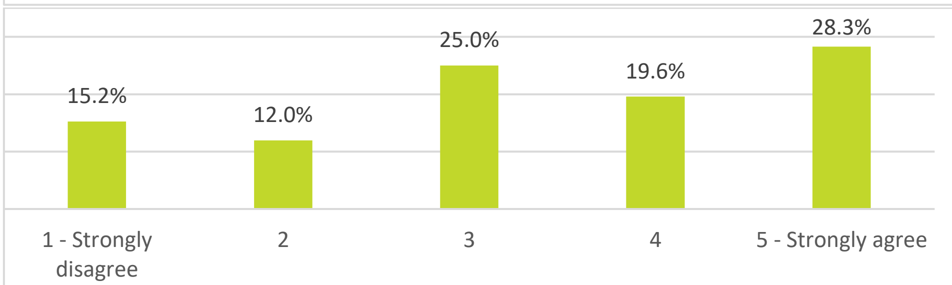
There are adequate high school work experience programs in Surrey. (N=89)

Mean (2.63)



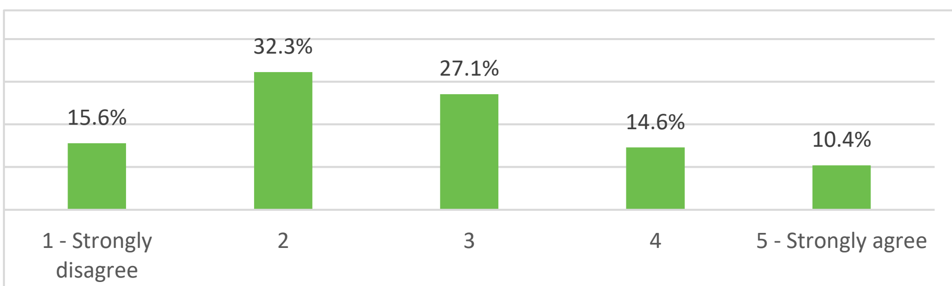
Our organization actively recruits graduates from PS programs in Surrey and Metro region. (N=92)

Mean (3.34)



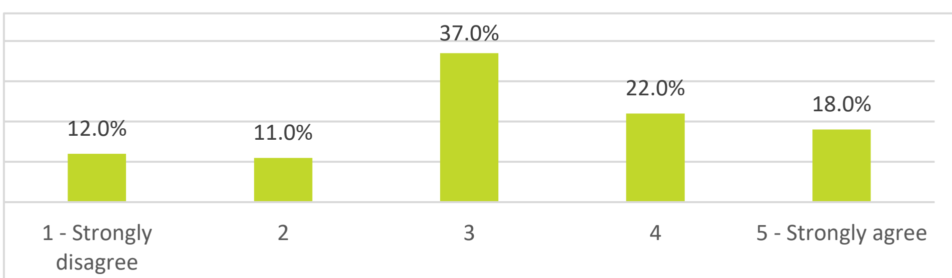
There are adequate co-op, internships and other PS experiential programs in Surrey and Metro region. (N=96)

Mean (2.72)

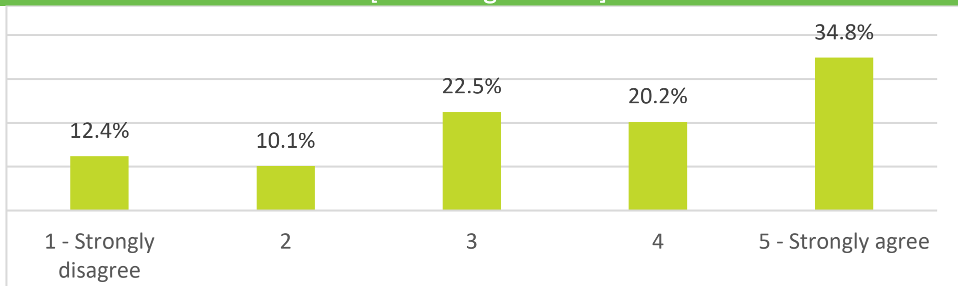
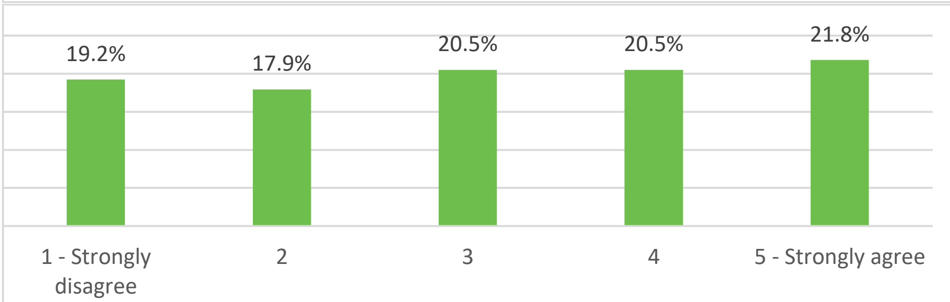
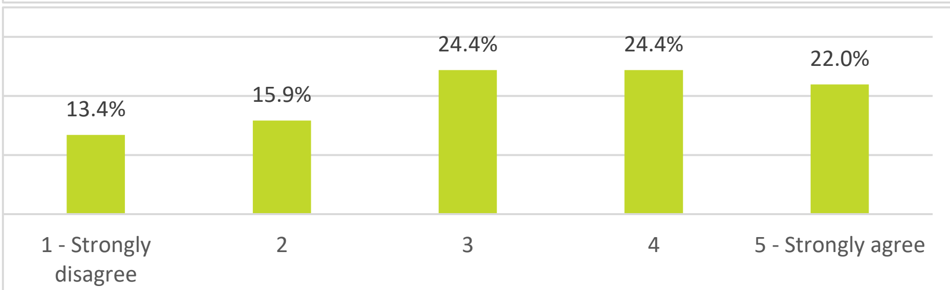
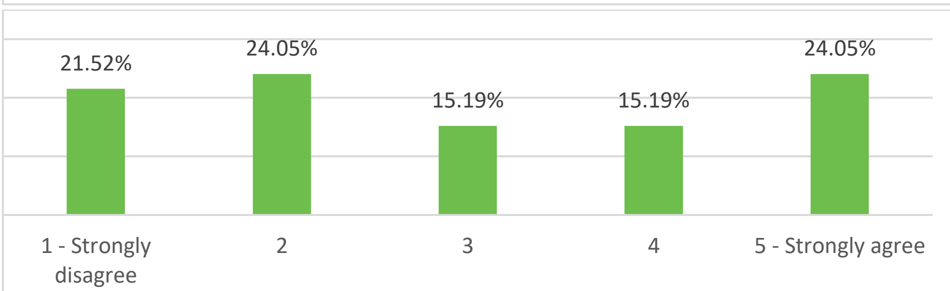
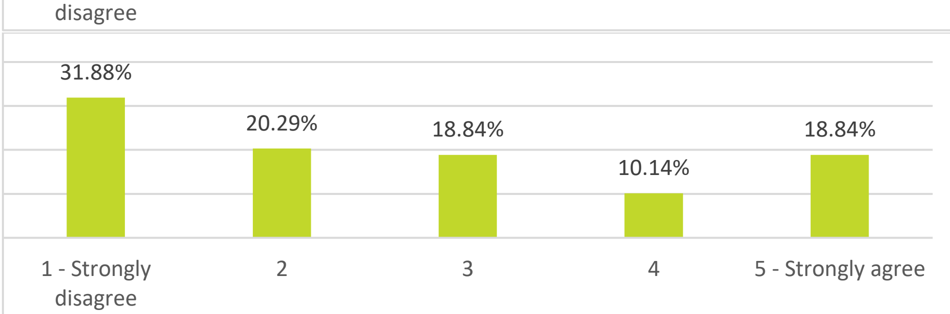


Graduates of PS programs possess the skills and knowledge needed by our organization. (N=100)

Mean (3.23)



Industry Training Programming (Q14)

Statement	Result [Scale – Agreement]
Our organization is familiar with industry training programs for our industry. (N=89) Mean (3.55)	
Industry training programs are supported (cash or in-kind) by our organization. (N=78) Mean (3.08)	
Graduates of industry training programs possess the competencies needed by our organization. (N=82) Mean (3.26)	
Our organization regularly employs apprentices. (N=79) Mean (2.96)	
Our organization regularly employs journeypersons. (N=69) Mean (2.64)	

Other strategies and policies to enhance education, training and employment (Q15)

[See main body of report]

- Incentives for employer to hire apprentice or workers have no prior work experience. Employer does spend much resources and money to train a newly step in person into work force.
- Information programs about realistic requirements to be a full-time employee with reasonable expectations outlined of what is expected of an employee, new and long-time.
- The Provincial Government must provide language assessments and ESL training for skilled immigrants if we want newcomers to work in well-paying jobs and contribute to the TAX coffers. BC is the only non-participating province on ESL training. Job specific language training is a must for any economy.
- A better driller training program. The only one in Canada is in Ontario at Fleming College
- Skill-based education and training opportunities
- Providing more opportunities for ECE's to go to school, provide childcare benefits, provide assistance to organizations to be able to provide livable wages.
- Educate businesses about the programs. I have never heard of any programs in place to help us place staff.
- There is a lack of qualified people available to meet the needs to the many agencies like ourselves working with the Provincial Government through Community Living BC. Specific skills are Positive Behaviour Supports, strategies for dealing with aggressive behaviours, challenging behaviour, mental health issues, supporting people with intellectual disabilities to learn daily living skills etc.
- Incorporate a business skills package to pair with the industry training and education. Things small businesses can appreciate and reward new trainees for (i.e. accounting, marketing, social media, web design etc.)
- We need more specialized industry which will get more specialized skill people. Presently Canada has a brain drain of specialized mid-level professionals because there are no jobs for them.
- Import skilled immigrants.
- Increase in education standards quality and quantity wise.
- Better policies for employers to be able to recruit and retain employees from other countries
- Employers being more willing to take on High School students for Work Experience programs.
- Let employers know what options are available.
- Better exposure to the roots and heritage of our great nation and Canada's short history.
- Need more trades spaces. Our apprentice people consistently have excessive wait times to get a spot in school.
- I believe employers and employees need to be flexible with their experience and welcome talent from other industries and experience.
- Parents and Teachers need to be 'educated' about the career opportunities in construction. The industry is stereotyped as being unsafe, poor working conditions and no opportunity for career advancement. Elevate

the awareness of the importance of gaining a Driver's License (even if the individual doesn't choose to purchase a car).

- Local high schools have work experience components however they report 'employer fatigue.' It can be challenging for micro, small or medium sized businesses to participate which results in many employers saying 'no' to high school work experience opportunities either due to capacity or lack of understanding of how it could benefit them when looking for employees later on. It is important to make this bridge from high school and create awareness of potential jobs/sectors as this can better inform youth's post-secondary pathway. Perhaps a joint venture with schools, WorkBC and Surrey employers to 'showcase' jobs beyond the traditional ones that kids may already know about.
- Strategies on integrating immigrants on work visas into the workforce - providing them training programs in the manufacturing industry. Benefits or government support for recruiting immigrants on work visas and students on student visas.
- "More practicum placement from Colleges and Universities in all areas of employment.
- Focus on trades programs and training - apprenticeship opportunities and funding potential.
- New immigrant integration programs made easily accessible for employers, employees and newcomers."
- Incentive for high school students to work in construction industry.
- Tax rebates or govt. incentives to hire new staff.
- There is a shortage of qualified applicants for the health care industry, registered nurses, care aides, recreation assistants.
- More employer input.
- For some employees with families it is a hardship to take the decrease in salary as Employment Insurance. Need EI to be closer to matching their wage. Apprentices don't start receiving EI until halfway through their technical training.
- Heightened emphasis on trade-based careers starting in high school - present as a viable and lucrative alternative to post-secondary education/training. Create more effective training opportunities with trades or trade associations.
- I would be more willing to train someone who knows nothing about our field if taking that risk were subsidized or resulted in some financial benefit (training is the largest expense by far). Also, if the person is a risk, I am unlikely to pay for them to move to Surrey from elsewhere in Canada. If relocation were supported by a government program, I might take the chance.
- Include more Indigenous and minorities in the programs and making the programs more accessible to them.
- Crime reduction.
- Create employment opportunities and bring business to BC. Housing market is a problem in BC. Many talented people leaving for other provinces because they cannot afford cost of living especially housing.
- Educating students on current employer needs, trends, awareness, skill-level and many attributes suiting business in Surrey and the Vancouver area.

Final comments regarding human resource issues and opportunities (Q16)

[see main body of report]

- Train extensively to work about work ethics, morals, and responsibilities.
- Unfortunately, in our business, excellent English, both written and spoken is a requirement and understanding of business practices as well as requirements.   If an individual is being paid to do a job, it is expected that that job is done correctly and within a reasonable time period that would be comparative within reasons to a more experienced employee and that the new employee would strive to duplicate the work ethics and productiveness of others. Learning more about an employer is part of becoming an employee.
- Flexible work hours and location. An increase in public wi-fi areas.
- I believe there is value in continuing to develop - and then market - the attractiveness of living in the central city area of Surrey. There is a lot of new housing which is great, but there isn't really a community feel in the same way there is in New Westminster for example.
- At present the single largest impact on our current labour market and strategies is the cost of lower mainland housing including rents. Younger people are leaving the lower mainland, older workers are selling out of the lower mainland some even before retirement age to cash in on the differences of housing costs between the lower mainland and smaller towns. Additionally, younger workers starting families feel significant financial pressures due to upgrading their housing for larger families, going down to single incomes or childcare and are requesting wage adjustments or leaving for higher wages solely because they have to.
- Finding housing is a challenge for our employees in Surrey but also even more of a challenge is supporting individuals who are on Income Assistance to find safe and affordable living situations.
- Canada needs to be more self-reliant on food by utilizing its land resources to build greenhouses.
- Improve public transit so workers can commute to work if they don't have car.
- Transit for Surrey should be as good as Vancouver has and we are behind at the moment.
- We have tried to support and hired lot of refugees and employees on income assistance plans, however those candidates work for few weeks or so but are not interested in working long term as they prefer to be on income assistance after some time. This trend should change as it sends a bad message to these capable employable candidates who can work but choose not to work as govt. is providing them aid. If this aid is reduced or made stricter there would be no reason for unemployment.
- The focus should shift to career development rather than creating jobs.
- Illegal workers. International students working illegally. Visitors working illegally. Fake job postings to bring in TFW. TFW working illegally
- In addition to local WorkBC Centres, there are a plethora of service agencies who work with youth, immigrants/refugees and persons with disabilities (as examples). We need to keep reminding employers to connect or seek support on how to connect to potential talent pools.
- We've always paid entry level employees more than minimum wage. The increase in minimum wage hurt us quite a bit.

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- "Transit challenges - lack of options.
- Working with educational institutions to develop programs to work in the city you live in.
- How are we promoting trades programs to youth?
- Shortage of skilled labour needs to be addressed.
- Housing is a challenge, working families struggle to make ends meet due to the high living cost, and have to move away.
- Our main issues are finding reliable workers we offer above minimum wage , dental .medical good hours but the work force is not there, this is our third season of having hiring issues, out of 25 successful applicants half don't show up, 12 don't last 3 days, the others the last 3 days, 2 get fired, so we keep 1 in 25.
- Need more trades and lower education new immigrants, not just folks with degrees.
- There was no city category for Port Kells, which is a very large part of Surrey.
- We don't have many problems recruiting or retaining employees.
- Affordable rental housing would support our ability to attract highly skilled technical staff from outside B.C.
- Reach out to all groups by having representatives of those groups in your workforce dedicated to informing his/her communities.
- Infrastructure.

APPENDIX B - Copy of Survey Questionnaire

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Surrey Board of Trade Employer Survey

Dear Surrey Employer Representative,

You are encouraged to participate in this **Labour Market Survey of Surrey Employers** conducted by Human Capital Strategies on behalf of the Surrey Board of Trade (SBOT) to inform the development of a **Surrey Workforce Strategy**. Your response to this survey will contribute greatly to this.

The Surrey Workforce Strategy will guide employee training and investment and assist Surrey employers, workers and service providers in meeting future requirements. This project is funded by the Government of Canada and the Province of British Columbia.

The **objectives** of this survey are to:

1. Estimate the current and future employment in Surrey by industry and occupation
2. Identify challenges Surrey employers face attracting, recruiting, training and retaining workers
3. Identify occupational vacancies/shortages facing Surrey employers
4. Identify gaps in education training and employment programming in Surrey
5. Offer ideas for solutions for supporting Surrey employers and workers

We request that an employer representative who can accurately provide human resource information on your organization's workforce complete the survey. All information will be maintained in strict confidence according to federal and provincial privacy legislation. Anonymity will be maintained in reporting of results. You have the option of completing part of the survey and returning to it at any time or withdrawing from the survey at any point.

Please complete the survey before or by May 24th, 2019. If you have any questions or require assistance completing this survey, please contact Kerry Jothen, Human Capital Strategies at 250.213.9231 or kjothen@humancapitalstrategies.ca.

Employers completing the survey by the deadline will be eligible for a random draw prize valued at $500. Please provide your name and email address at the end of this survey to enter the draw.

The survey should take approximately 15 minutes to complete. **On behalf of the Surrey Board of Trade, thank you for helping build the future Surrey Workforce Strategy.**

SECTION 1 - COMPANY INFORMATION

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This survey is directed at a representative sample of private sector and public sector employers located in Surrey. Please respond to the following questions which pertain only to your establishment located in Surrey.

* 1. Is your establishment or part of it located in the City of Surrey?

- ◯ Yes
- ◯ No

* 2. In which Surrey town centre(s) is your organization located (select all that apply).

- ☐ City Centre
- ☐ Cloverdale
- ☐ Fleetwood
- ☐ Guildford
- ☐ Newton
- ☐ South Surrey
- ☐ Whalley

3. Please indicate whether your establishment in Surrey is the organization's head office, or a branch of an enterprise located outside of Surrey.

- ◯ Head Office
- ◯ Branch

4. Are there any other branch offices/operations of the enterprise located in Surrey? If so, how many?

- ◯ Yes
- ◯ No

5. What is your establishment's primary occupation (select one only)? If you are not certain, choose 'Unclassified'.

- ◯ Accommodation & Food
- ◯ Administration & Support, Waste Management
- ◯ Agriculture, Forestry, Fishing & Hunting
- ◯ Arts, Entertainment & Recreation
- ◯ Construction
- ◯ Education
- ◯ Finance & Insurance
- ◯ Health Care & Social Assistance
- ◯ Information & Culture
- ◯ Management of Companies
- ◯ Manufacturing
- ◯ Mining and Oil & Gas
- ◯ Other Services
- ◯ Technology - Professional, Scientific & Technical
- ◯ Public Administration
- ◯ Real Estate
- ◯ Retail Trade
- ◯ Transportation & Warehousing
- ◯ Utilities
- ◯ Other (please specify)

SECTION 2 - YOUR ORGANIZATION'S WORKFORCE

The purpose of the following questions is to quantify your establishment's full-time and part-time workforce now and, in the future.

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6. Please indicate the following:

1) the current number of workers (full-time + part-time) within your establishment in the following occupational categories (#)

2) for each, whether you have a current hard-to-fill vacancy each category (y/n for yes/no)

3) for each, whether you expect the # of employees to increase/decrease/stay the same in 5 years in each category (+/-/0 for increase/decrease/no change)

<u>If you do not employ workers for any of the occupational categories, please leave the cell blank</u>

	1) Current Full-Time and Part-Time Employees (#)	2) Do you have a current hard-to-fill vacancy? (y/n)	3) Do you expect the # of employees to increase/decrease/stay the same in 5 years? (+/-/0)
Management occupations (senior and middle managers)			
Business, finance and administration occupations (accountants, auditors, bookkeepers, financial clerks, office support, other administration, etc.)			
Natural and applied sciences and related occupations (scientists, researchers, engineers, technologists, technicians, etc.)			
Health occupations (physicians, specialists, nurses, dentists, physiotherapists, health support positions, etc.)			
Occupations in education, law and social, community and government services (teachers, professors, lawyers, counsellors, policy, public protection services, etc.)			
Occupations in art, culture, recreation and sport (actors, writers, designers, athletes, coaches, artists, etc.)			
Sales and service occupations (salespersons, sales clerks, service advisors, customer service relations, technical sales, wholesale, etc.)			
Trades, transport and equipment operators and related occupations (trades, installers/repairers, heavy equipment operators, transport drivers, material handlers, labourers, etc.)			
Natural resources, agriculture and related production occupations (labourers, harvesting, landscaping, equipment operators, production workers, etc.)			
Occupations in manufacturing and utilities (machine operator, assemblers, process control operator, utilities workers, etc.)			

SECTION 3 - ATTRACTION, RECRUITMENT AND RETENTION OF WORKERS

This section is intended to learn about employers' challenges and strategies in attracting, recruiting and retaining workers, and the reasons behind these.

7. Please identify a maximum of 3 specific occupations for which your organization has the most difficulty in 1) recruiting workers; and 2) retaining employees. Be specific as possible (e.g. "carpenter" instead of "trades", "electronic technician" instead of "technician", "mechanical engineer" instead of "engineer", "machine operator" instead of "operator", etc.).

	1) Occupations Most Difficult to Recruit for	2) Occupations Most Difficult to Retain Employees in
#1 Most difficult occupation (be as specific as possible)		
#2 Most difficult occupation (be as specific as possible)		
#3 Most difficult occupation (be as specific as possible)		

8. Based on a scale of 1 to 5, please indicate the level of importance your organization currently attributes to recruiting from the following sources of new workers.

	1 - Not important at all	2	3	4	5 - Very important
High school	○	○	○	○	○
Industry training (apprenticeship)	○	○	○	○	○
Colleges & technical institutes	○	○	○	○	○
Universities	○	○	○	○	○
Other companies in our industry	○	○	○	○	○
Other industries	○	○	○	○	○
Other BC locations	○	○	○	○	○
Other provinces	○	○	○	○	○
Other countries	○	○	○	○	○
Other recruiting source	○	○	○	○	○

9. Based on a scale of 1 to 5, please rank according to their level of importance the following methods for attracting and recruiting new workers to your organization.

	1 - Not important at all	2	3	4	5 - Very important
Job boards	○	○	○	○	○
Job fairs	○	○	○	○	○
Recruitment websites	○	○	○	○	○
Social media	○	○	○	○	○
Print media	○	○	○	○	○
Employment agencies	○	○	○	○	○
Recruitment agencies	○	○	○	○	○
Internal employee referral	○	○	○	○	○
Other methods (please specify)	○	○	○	○	○

10. Based on a scale of 1 to 5, please indicate the extent to which your organization recruits and employs workers from the following groups.

	1 - Not at all	2	3	4	5 - Very extensively
Permanent immigrants/refugees	○	○	○	○	○
Temporary foreign workers	○	○	○	○	○
International post-secondary students	○	○	○	○	○
Indigenous people	○	○	○	○	○
Older workers and/or retires (55-65+)	○	○	○	○	○
Persons with disabilities	○	○	○	○	○
Visible minorities	○	○	○	○	○
Women (for employment in occupations in which they are under-represented)	○	○	○	○	○
Youth (15-24)	○	○	○	○	○

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11. On a scale of 1 to 5, what are the most important reasons for your organization experiencing challenges in attracting and recruiting workers for its positions?

	1 - Not a reason at all	2	3	4	5 - A very important reason
Lack of literacy/numeracy	○	○	○	○	○
No high school completion	○	○	○	○	○
Lack of life skills	○	○	○	○	○
Inability to work with your new technology	○	○	○	○	○
Inadequate technical skills	○	○	○	○	○
Inadequate transportation options	○	○	○	○	○
Lack of affordable housing	○	○	○	○	○
Lack of adequate child care	○	○	○	○	○
Inadequate professional qualifications	○	○	○	○	○
Health and/or addiction issues	○	○	○	○	○
	1 - Not a reason at all	2	3	4	5 - A very important reason
Inadequate workplace English language skills	○	○	○	○	○
Ability to provide competitive compensation	○	○	○	○	○
Other reasons	○	○	○	○	○

12. On a scale from 1 to 5, what are the most important factors that create retention challenges in positions in your organization?

	1 - Not a factor/reason at all	2	3	4	5 - A very important factor/reason	Do not know
Accessible, affordable transportation options	◯	◯	◯	◯	◯	◯
Affordable housing	◯	◯	◯	◯	◯	◯
Workplace support resources (e.g. mentoring, coaching, counselling, etc.)	◯	◯	◯	◯	◯	◯
Employee ability to adapt to/work with your new technology	◯	◯	◯	◯	◯	◯
English language skills	◯	◯	◯	◯	◯	◯
Culture or social reasons	◯	◯	◯	◯	◯	◯
Employee salary/wage level	◯	◯	◯	◯	◯	◯
Employee benefit level	◯	◯	◯	◯	◯	◯
Health and/or addiction issues	◯	◯	◯	◯	◯	◯
Seasonality of work	◯	◯	◯	◯	◯	◯
	1 - Not a factor/reason at all	2	3	4	5 - A very important factor/reason	Do not know
Reliability of training program(s)	◯	◯	◯	◯	◯	◯
Working conditions	◯	◯	◯	◯	◯	◯
Other reasons	◯	◯	◯	◯	◯	◯

SECTION 4 - EDUCATION, TRAINING AND EMPLOYMENT PROGRAMMING

This section asks questions about your views on and support for education, training and employment programs related to Surrey.

13. Based on a scale of 1 to 5, please indicate your level of agreement with the following statements pertaining to K-12 and post-secondary education programming related to Surrey employers.

	1 - Strongly disagree	2	3	4	5 - Strongly agree	N/A
The K-12 system produces graduates that are ready for entry-level employment in Surrey	◯	◯	◯	◯	◯	◯
There are adequate high school work experience programs in Surrey.	◯	◯	◯	◯	◯	◯
Our organization actively recruits graduates from post-secondary programs in Surrey or the broader Metro region.	◯	◯	◯	◯	◯	◯
There are adequate co-operative education, internships and other post-secondary experiential programs in Surrey or the broader Metro region.	◯	◯	◯	◯	◯	◯
Graduates of post-secondary programs possess the skills and knowledge needed by our organization.	◯	◯	◯	◯	◯	◯

14. Based on a scale of 1 to 5, please indicate your level of agreement with the following statements pertaining to BC's industry-based training and employment programming (e.g. apprenticeship, foundation, work experience programs).

	1 - Strongly disagree	2	3	4	5 - Strongly agree	N/A
Graduates of industry training programs possess the competencies needed by our organization	◯	◯	◯	◯	◯	◯
Our organization regularly employs apprentices	◯	◯	◯	◯	◯	◯
Our organization regularly employs journeypersons	◯	◯	◯	◯	◯	◯
Our organization is familiar with industry training programs for our industry	◯	◯	◯	◯	◯	◯
Industry training programs are supported (cash or in-kind) by our organization	◯	◯	◯	◯	◯	◯

15. What other policies, programs and strategies might enhance the education, training and employment programming to help meet the human resource needs of Surrey employers?

Other Questions

16. Please provide any other comments you would like regarding human resource issues or opportunities regarding the Surrey labour market and suggestions for a Surrey Workforce Strategy.

* 17. Please indicate if you would like to receive a summary report of the results of this survey from the Surrey Board of Trade and/or be entered in the prize draw. Your name and email will only be used for the purposes of sending you a summary report and/or the draw and will be kept confidential and not shared or circulated.

- ◯ Send me a copy of the summary report only
- ◯ Enter me in the prize draw only
- ◯ Both send me a copy of the summary report and enter me in the prize draw
- ◯ I am not interested in either

Surrey Board of Trade Employer Workforce Survey - DEADLINE May 24, 2019

This program is funded by the Government of Canada
and the Province of British Columbia.

Canada BRITISH COLUMBIA

This program is funded by the Government of Canada
and the Province of British Columbia.

APPENDIX C - List of Key Informants

Company/Organization	Interviewee
BM Group of Companies	Balraj Mann
Boldfish Video Productions	Tim Hall
Burnaby Lake Greenhouse	Robert Vander Ende
City of Surrey	Gurinder Kang
Coast Capital Savings	Sarah Jasper
Conquer Experience	Dave Foster
Financial CAD Corporation (FINCAD)	Susan Harmer
Fortis BC	David Bennett
Jacob Bros. Construction Inc.	Paul Simpson
KDS Construction Ltd	Marvin Kale
Kwantlen Polytechnic University	Laurie Clancy
LMS Reinforcing Steel Group	Ron McNeil
London Drugs	Hermanjit Mahil
Moxie's	Kristie Oiom
Northview Golf & Country	James Eriksen
Northwest Sheet Metal	Bernie Antchak
Pacific Salmon Industries Inc.	Michael Sato
Powertech Labs	Raymond Lings
PW Trenchless	David O'Sullivan
Robar Industries	Trevor Eden
Sheraton Vancouver Guildford Hotel	John Kearns
Simon Fraser University, Surrey	Stephen Dooley
Solaris Management Consultants Inc.	Mindy Salh
Sunrise Kitchens Ltd.	Amrita Bhogal
Supersave Group	Josh JansenVandoorn
Surrey School District (District 36)	Jordan Tinney
Teal Jones	Jennifer Jones
Tien Sher Construction Group Inc.	Charan Sethi
Van Gogh Designs Furniture Ltd.	Amarjit Dhindsa
Walmart	Robert Bayliss
Zinetti Food Products	Maurizio Zinetti

APPENDIX D - List of Key Informant Interview Questions

SBOT Surrey Labour Market Priorities Project
Employer Interview Questions

*****Reminder about confidentiality and anonymity*****

1. **Organizational profile – Description of the organization in terms of size, employees, skillsets, number of years, etc.**

   Interviewer:
   Interview Date:
   Interviewee Name and Title:
   Contact number:
   Organization Name:
   Organization Type:
   Location(s) or just head office or primary location:
   Number of Employees: 80 salary and 200+ hourly
   Number of Years in Business:
   Sector Category, (i.e. Health Tech, Clean Tech, Agriculture, Advanced Manufacturing, Creative, Retail, Hospitality, etc.):

2. **Understanding of the project.**

   Do you have any questions before we begin?

3. **Perspective on related factors (except workforce) impacting growth.**

   a) What other factors or trends (e.g., demographics, markets, rents, etc.) are impacting organizational growth?

   b) To what extent are availability of affordable housing and accessible transportation affecting your ability to attract/recruit and retain workers?

4. **Expectations about technological developments including automation impacting growth**

   a) What important technological developments (including automation), if any, are impacting your organization/industry now or in the coming years?

   b) How are these developments impacting your workforce and specific occupations?

   c) How is your organization/industry responding?

5. To what extent do you think being located in Surrey is helpful (or not) for attracting and retaining workers? What are Surrey's attractive and unattractive attributes in this context?

6. Workforce issues and challenges; shortages, recruitment, attraction and retention.

    a) Does your organization/industry currently face labour or skills shortages or hard-to-fill vacancies? If so, which occupations are primarily impacted and to what extent?

    b) What do you think is causing this?

    c) Does your organization/industry have difficulty ***attracting*** workers with the right skills and qualifications needed to do the job? If so, which occupations and why?

    d) Does your organization/industry have difficulty ***retaining*** workers? If so, which occupations and why?

7. Workforce education and training.

    a) To what extent does your organization/industry hire high school graduates (right after graduation)? For what kinds or positions? How is it working?

    b) Does your organization/industry rely on graduates of post-secondary institutions to fill job vacancies? If so, 1) which programs; and 2) do the graduates that you hire have the right skills and abilities to perform the work?

    c) Does your organization/industry provide in-house or on-the-job training? Please describe.

    d) Does your organization/industry provide employees with professional/career development opportunities (e.g., management/supervisory skills, new technologies, cross-cultural awareness, trades training, etc.)?

8. Other labour supply sources.

    a) What other sources of labour does your organization/industry rely on for recruiting new employees (e.g., general population, interprovincial and international migrants, underrepresented groups such as persons with disabilities and women, other companies, other industries, etc.)?

9. Labour market policy actions.

    a) What actions by governments, educators and others does your organization believe are needed to help address 1) labour shortages; 2) skills shortages; 3) education/training gaps now and in the future?

10. Other

    a) If you have not already done so, can you please identify any best or promising practices for attracting, recruiting, training and retaining workers in your organization/industry?

    b) Do you have any other comments about this topic area that you would like to provide?

    c) Do you have any other questions?

APPENDIX E - List of Focus Group Participants

Company/Organization	Interviewee
Employer Focus Group #1 – June 25, 2019	
1. Affinity Manufacturing	Sunit Bector
2. Cimtech Manufacturing	Paul Ghotra
3. McElhanney Ltd.	James Pernu
4. Murray Latta Progressive Machine Inc.	Corinne Jones
5. Northern Star Benefit Consultants Ltd.	Suzi Becett
6. Powertech Labs Inc.	Susie Franzke
7. Surrey City Development Corporation	Monica Niles
Employer Focus Group #2 – June 26, 2019	
1. Canus Trading Ltd.	Vasso Vahlas
2. Coast Capital Savings	Jackson White
3. Conquer Experience	Dave Foster
4. Polycrete	Aaron Bourdeau
5. Sunrise Kitchens Ltd.	Amrita Bhogal
6. The Teal Jones Group	Jennifer Jones
7. Zenith Marketing by ZT&BD Ltd.	Enrique Vidal
Stakeholder Focus Group – June 27, 2019	
1. Douglas College, The Training Group	Jennifer Kuenzig
2. Fraser Region Aboriginal Friendship Centre Association	Louise Sallai
3. ISS*of*BC	Ewa Karczewsksa
4. Kwantlen Polytechnic University	Julia Denker
5. New Westminster & District Labour Council (NWDLC)	Stephen Crozier
6. NWDLC	Janet Andrews
7. Semiahmoo First Nation	Harley Chappell
8. Surrey Libraries	Samantha Quizon
9. Surrey School District #36	Pete Nuij

APPENDIX F - List of Focus Group Questions

Employer Focus Groups – June 25 & 26, 2019

Part 1 (1:20-1:50) – ROUNDTABLE ON PRIORITY AREAS TO ADDRESS

1. Please briefly identify your organization's ***#1 workforce challenge*** that you would like to see a Surrey Workforce Strategy address. It should fit within one or more of the following themes:

    a) Labour market/workforce information/planning
    b) Attracting and/or recruiting talent
    c) K-12 education/graduates
    d) Post-secondary education/graduates
    e) Workplace training
    f) Professional and career development
    g) Retaining talent
    h) Public policies and programs
    i) Other

2. Now that you have heard about a range of key workforce priorities to take action on, please prioritize. Pick your ***top 3 workforce challenges*** based on the following types of criteria:

    a) Urgency to address
    b) Extent of potential impact/benefit
    c) Viability or likelihood of success
    d) Ease of executing
    e) Cost or cost-effectiveness
    f) Quick win
    g) Other?

Part 2 (1:50-3:10) – IDENTIFYING KEY POTENTIAL SOLUTIONS

3. Given your understanding of key workforce challenges and of what works for employers in Surrey, *please identify* ***key potential solutions – tactics or actions*** – for each of the following categories of workforce challenges/questions:

    a) As an employer, **what action(s) do you need and from whom** (and that could be in a Surrey Workforce Strategy) to help your organization address its workforce priorities?
    b) **Millennial and GenZ Workforce Cohorts** – What do employers need to do to attract, recruit and retain these younger cohorts?
    c) **Indigenous Workforce** – What do employers need to attract, recruit and retain more Indigenous people?
    d) **Persons with Disabilities Workforce** – What do employers need to attract, recruit and retain more Indigenous people?
    e) **Apprenticeships** – What do employers need to be able to create more formal apprenticeships in their operations?

f) **Public policies** – What could any level of government do to directly help Surrey employers their workforce priorities?
g) **Information sharing** – What information would help you as an employer to address workforce challenges, and from whom is it needed?
h) **Working together, partnerships** – How could employers and others better work together and collaborate on to address workforce issues in Surrey?
i) **Navigating existing programs and funding** – What would help employers – especially smaller ones – to more easily navigate and access government and other funding programs?
j) **Other critical tactics/actions**?

Part 3 (3:10-3:40) – PRIORITIZING & NEXT STEPS

4. Please prioritize the ***top 3 potential solutions/actions*** (in order of urgency and/or impact) you have heard today to be included in the Surrey Workforce Strategy. If you've had an epiphany and a new solution has just come to mind, please include it in your top three.

5. What is one key piece of ***advice*** you have for us in developing a Surrey Workforce Strategy over the next two months?

Stakeholder Focus Group – June 27, 2019

Part 1 (1:20-1:50) – ROUNDTABLE ON PRIORITY AREAS TO ADDRESS

6. Please briefly identify what you think is Surrey's ***#1 workforce challenge*** that you would like to see a Surrey Workforce Strategy address. It should fit within one or more of the following themes:

   j) Labour market/workforce information/planning
   k) Attracting and/or recruiting talent
   l) K-12 education/graduates
   m) Post-secondary education/graduates
   n) Workplace training
   o) Professional and career development
   p) Retaining talent
   q) Public policies and programs
   r) Other

7. Now that you have heard about a range of key workforce priorities to take action on, please prioritize. Pick what you think are the ***top 3 workforce challenges*** based on the following types of criteria:

   h) Urgency to address
   i) Extent of potential impact/benefit
   j) Viability or likelihood of success
   k) Ease of executing
   l) Cost or cost-effectiveness
   m) Quick win
   n) Other?

Part 2 (1:50-3:10) – IDENTIFYING KEY POTENTIAL SOLUTIONS

8. Given your understanding of key workforce challenges and of what works for employers and others in Surrey, *please identify* ***key potential solutions – tactics or actions*** – for each of the following categories of workforce challenges/questions:

   k) What **action(s) do you think are needed and by whom** (and that could be in a Surrey Workforce Strategy) to help your employers address their workforce priorities?
   l) **Millennial and GenZ Workforce Cohorts** – What do employers and others need to do to attract, recruit and retain these younger cohorts?
   m) **Indigenous Workforce** – What do employers and others need to do to attract, recruit and retain Indigenous people?
   n) **Persons with Disabilities Workforce** – What do employers and others need to do to attract, recruit and retain persons with disabilities?
   o) **Apprenticeships** – What do employers and others need to be able to create more formal apprenticeships in their operations?
   p) **Public policies** – What could any level of government do to directly help Surrey employers and others with workforce priorities?
   q) **Information sharing** – What information would help you and employers to address workforce challenges, and from whom is it needed?
   r) **Working together, partnerships** – How could employers and others better work together and collaborate on to address workforce issues in Surrey?
   s) **Navigating existing programs and funding** – What would help employers – especially smaller ones – to more easily navigate and access government and other funding programs?
   t) **Other critical tactics/actions**?

Part 3 (3:10-3:40) – PRIORITIZING & NEXT STEPS

9. Please prioritize the ***top 3 potential solutions/actions*** (in order of urgency and/or impact) you have heard today to be included in the Surrey Workforce Strategy. If you've had an epiphany and a new solution has just come to mind, please include it in your top three.

10. What is one key piece of ***advice*** you have for us in developing a Surrey Workforce Strategy over the next two months?

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APPENDIX G - References

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