

# Quarterly Employer Surveys in Your Community

How to Implement  
Quarterly Surveys and  
Benefit from Timely  
Employer Data



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### HOW DID WE DO?

We invite your feedback on all publications produced by Workforce WindsorEssex.

[workforcewindsoressex.com](http://workforcewindsoressex.com)

880 N Service Rd #201, Windsor ON N8X 3J5  
226-674-3220 | [info@workforcewindsoressex.com](mailto:info@workforcewindsoressex.com)

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# Background

**Workforce WindsorEssex** is one of eight Local Employment Planning Councils across Ontario. In our initial pilot phase, we had the opportunity to carry out quarterly surveys with employers to learn about their current workforce, including challenges and successes. These surveys began in June 2016 and concluded in April 2017. The final bulletin included results from the entire year.

Quarterly employer survey results provided immense value not only for us in informing our research projects but also for community stakeholders in informing their daily work. Based on this value, we decided to continue quarterly surveys after the initial pilot phase and released our latest survey in May 2018. To date, we have carried out 8 quarterly surveys.

As we have reflected on the value of quarterly surveys to our region, we wanted to create a resource that would share the successes and challenges we encountered in this process. Our hope is that this resource can assist other organizations that are trying to find effective ways of

surveying employers. We understand that your region may be different than Windsor-Essex, and you may have different skill sets and years of experience on your work team, however, we believe that these insights may be helpful to you and your team as you consider the most effective ways for you to interact with employers and share labour market information in your community.

**This resource will walk you through the process we took in:**

- *Creating survey questions*
- *Designing the survey*
- *Marketing to employers*
- *Analyzing responses*
- *Sharing results*

We will also share how this data can be used with different groups and the value that this data added to our region.

You can view our quarterly survey results here: [workforcewindsoressex.com/quarterly-survey/](http://workforcewindsoressex.com/quarterly-survey/)

# Quarterly Employer Surveys

## From Conception to Analysis

The process of creating and deploying an employer survey each quarter may seem daunting, but we've developed methods to keep this process as efficient and simple as possible. This guide will take you through the following:

1. Question Design
2. Marketing the Survey
3. Analyzing the Data
4. Creating the Bulletin
5. Distributing the Bulletin

### 1. Question Design

There are so many questions you might want to ask employers, and it can be hard to narrow down which questions you want to ask. Our typical survey is around 20 questions in length and takes employers approximately 5 minutes to complete. Below are the questions we usually ask and our rationale for asking these questions.

#### Contact Information

1. Organization Name
2. First and Last Name
3. Job Title
4. Email Address

#### Why include this?

Knowing who is answering the survey allows for direct follow-up, targeted marketing for future surveys, and can help with scrubbing data.

#### Tip of the Trade:

Ask these questions at the beginning of the survey so if a respondent doesn't finish the survey, you can email them directly asking them to complete the questions they didn't quite get to!

#### Demographics

5. Select the organization's main physical location in Windsor-Essex.
6. Select the total number of people you employ at all Windsor-Essex locations.
  - a. 1-4
  - b. 5-99
  - c. 100-499
  - d. 500+
7. Select the main sector in which you operate. (All 2-digit NAICS codes are options).

#### Why include this?

Like most surveys, we ask demographics questions to be able to group and sort our respondents into categories according to their geography, size of business, and industry and to ensure we have appropriate representation from each group.

#### Tip of the Trade:

It might not be obvious to some that a NAICS code like Administration & Support, Waste Management & Remediation Services includes employment services and call centres. For less obvious NAICS codes, include a description of industries that fall under the code in brackets.

## Current Workforce

8. Did your organization experience any separations in the last 3 months?  
(i.e. Quits, retirements, layoffs, dismissals, etc.)
  - a. Yes
  - b. No
9. Please indicate the number of separations by category.
  - a. Quits
  - b. Retirements
  - c. Layoffs
  - d. Dismissals
  - e. Other
10. Did your organization hire any employees in the last 3 months?
  - a. Yes
  - b. No
11. Please indicate the number of hires by category.
  - a. Full-time: Working 30 hours or more per week, excluding overtime.
  - b. Part-time: Working less than 30 hours per week, excluding overtime.
  - c. Contract: A person working under contract for whom a T4 statement is not required.
  - d. Seasonal: Employment that does not continue year-round but usually recurs.
12. How many hires were youth (between the ages of 15 and 29)?
13. Please list up to 3 job titles for which you hired the most employees in the last 3 months.
14. Were any positions hard-to-fill in the past 3 months?
  - a. Yes
  - b. No
15. Please list up to 3 positions that were hard-to-fill.

## Why include this?

This is the portion of the survey that allows us to see how the workforce is currently doing. We can see if there is turnover in organizations due to quits, what the working hours are of available jobs, whether employers have been hiring youth, and the specific positions employers are hiring for and having trouble filling. These questions are especially important for providing timely information to media, being proactive in responding to trends, and confirming or denying what other data sources may be telling us, such as job posting, job vacancy, and forecasting data.

### Tip of the Trade:

Branch your survey questions using “Yes” or “No” questions to ensure respondents are only answering questions that apply to them. This helps respondents complete your survey as quickly as possible and helps promote a positive relationship with respondents who will recognize you value their time.

## Future Workforce

16. Do you plan on hiring anyone over the next 3 months?
- a. Yes
  - b. No
17. Please list up to 3 positions you are planning to hire for in the next 3 months.
- a. Yes
  - b. No
18. Please identify the top challenge or barrier to growth your organization is currently experiencing.
- a. Marketing
  - b. Financing
  - c. Business planning
  - d. Cash flow management
  - e. R&D Supports
  - f. Workforce skills shortage
  - g. High turnover rate
  - h. Industry slowdown
  - i. Facility size
  - j. No challenges/barriers
  - k. Other

## Why include this?

Asking about future hiring demand is one way to know what positions will be in-demand in the coming months. This helps students and job seekers prepare for the roles that will be available and helps employment service providers demonstrate the need for workers in certain positions to their clients. It is also important to know what might be impeding future business growth as businesses can be connected to services that may help them overcome these barriers, and it can also establish a trend that allows for a focused strategic approach from community partners.

### Tip of the Trade:

Ensure you read the specific comments of those who choose “other” as these comments may establish a question option that is not currently available. For example, we added “high turnover rate” and “industry slowdown” to our most recent surveys as these were repeatedly mentioned by those who chose “Other” in earlier surveys.

## Conclusion and Follow-Up

1. Please share any additional comments you wish to make.
2. May we contact you to follow-up about this survey?
  - a. Yes
  - b. No
3. Would you like to receive releases of our projects, including the aggregated bulletin of this survey via email upon its release?
  - a. Yes
  - b. No

### Why include this?

Giving respondents the ability to leave additional comments can be a great source for you to get feedback on their thoughts about the survey as well as learn about industry trends. There may be room for follow-up based on this feedback, on other questions in the survey, or for other research projects, so asking for permission to follow-up will allow you to do so while complying with Canada's anti-spam legislation. This also applies to sending project updates and releases.

### Tip of the Trade:

If you intend on following up with participants, reference the survey and their agreement to be contacted in your follow-up email. This way, they'll know who you are and are more likely to respond to your follow-up rather than think your email belongs in their junk folder.

## 5 Things to Consider When Designing Your Survey Questions

### 1. Consult your working groups and other stakeholders before releasing each survey.

This will ensure you are still asking questions relevant to the community, and at the same time, you can have them check for errors in your questions.

### 2. Try to maintain the same questions each survey.

This allows for comparability and trend analysis over time, which increases the value of the survey results to you and your community.

### 3. Keep your survey short!

Employers will spend 5 minutes completing a survey, but the non-completion rate will rise the longer they have to spend making their way through your questions.

### 4. Add in one-off questions that might be relevant to a particular event or change happening in your community.

For example, in partnership with our local hackerspace, we asked employers about their interest in taking business-building IT workshops, which allowed the organization to tailor workshops to employers' needs!

### 5. Try not to ask questions that can be answered elsewhere.

For instance, in our first surveys, we asked about wages for in-demand and hard-to-fill questions, but we have access to this information elsewhere, so it was a redundant question that didn't need to be asked and was simply increasing the length of the survey.

## 2. Marketing The Survey

You've got your questions designed and approved, but now you need responses. Employers can be one of the hardest groups to survey as their time is money and it can be difficult to connect to the right person at an organization who knows the answers to your questions. We leave the survey open for one month to give employers plenty of time to complete the survey. We've found the following strategies to work best for reaching out to employers and garnering the most responses throughout the month the survey is open.

### 1. Email blast an employer list, twice.

The simplest way to reach employers initially is to send an email to the employers you already know. This email should be short and concise, with only the most necessary details to ensure employers click your link and complete the survey. Include the approximate time it takes to complete the survey, how long it will be open for, and a line about the benefits of completing the survey.

About halfway through the month, it's time to send a reminder email to those **who have not yet completed the survey**. This means you should be exporting your current responses, cross-checking with your current employer list, and creating a new employer list to ensure those who already completed the survey do not receive the reminder email. The reminder email should indicate it is a "friendly reminder" and again include only the time it takes to complete the survey, the closing date, a line about the benefits of completing the survey, and the survey link.

When sending mass emails, you'll likely get the most responses using two strategies. First, it is best to personalize the emails. If you use an email service like Constant Contact or MailChimp, you can create a personalized greeting automatically. Usually, you can write "Hi [NAME]" or a similar tag in the brackets, and the service will automatically fill in the first name based

on the information you have provided in your contacts list. Personalizing emails helps you build closer relationships with employers and can make the email feel more relevant to employers. Second, the email should come from your email address rather than a generic address for your organization. Again, this helps establish a closer connection with employers who might only complete the survey because of their relationship with you, and it can also save your email from landing in employers' junk mail folder!

### 2. Establish partnerships.

Know an organization that would want to ask a question or two to employers? Would an organization in your area benefit from receiving the raw data from the survey? Do employers and industry associations use the results to help with their workforce planning? You can establish partnerships with community organizations, employers, and industry associations that are willing to share the survey with their networks on your behalf. These groups may have

a different and wider network than your own, and industry associations in particular can help you target specific industries. Partnerships are also a great way to show the community support for the survey and the many stakeholders that are positively impacted by the survey.

In April 2017, we partnered with our local economic development corporation as well as the various municipal economic development officers in our region to conduct the Business Retention and Expansion Week survey, which included the questions we would normally have in our quarterly employer survey. By partnering with economic development, we were able to get over 100 more responses than our usual number of responses (typically around 70) and we also received useful economic development response data through the partnership! As a result of this success, we established the same partnership in May 2018 to conduct an International Economic Development Week survey.

### 3. Use Social Media

With a presence on Twitter, Facebook, and LinkedIn, you can advertise the survey to employers in your network as well as others in your network who can then easily share the survey with employers they know. For our most recent quarterly survey, we posted about the survey 8 times from January 8<sup>th</sup> to February 1<sup>st</sup> on Facebook and Twitter, reaching 3,563 people collectively.

This is also a great way to share statistics from your last quarterly survey as a hook to get employers to complete the most recent survey and to help the community see the value in the results.

### 4. Attend local events to advertise and network.

One of the best ways to connect with employers is in-person. We attend networking events hosted by our local chambers of commerce, economic development organization, and educational institutions as well as workshops hosted by the local Human Resources Professional Association chapter where we know employers will be present.

By attending these events, we can build face-to-face relationships with employers and have the chance to tell them about our organization and specific projects like the survey. When they eventually get an email asking them to complete the survey, they can put a face to our name and are more likely to know how they and the community can benefit from their response to the survey. Additionally, we often hand out small flyers or business cards with links to the survey at these events. Even if attendees don't follow the link to the survey, they become aware it exists and, again, will be more likely to answer an email requesting their response to the survey.

### 5. Incentivize the survey.

The first four surveys we conducted had incentives attached to them through the generosity of a local employer, Imaginative Group, and a local industry association, the Windsor Construction Association. For each of the first three surveys, Imaginative Group offered a draw for free marketing materials (business cards, postcards, or brochures) to one employer respondent and for the fourth survey offered a draw for a free comprehensive rebranding package to one respondent. This caught employers' attention, especially small businesses that may not have had the revenue for these materials and branding. The Windsor Construction Association offered a draw for an iPad to any construction employer that completed at least three of the four initial surveys. These incentives helped drum up excitement for the survey and show the support for the survey from local employers and industry associations.

Whether you use all five of these strategies or a combination of a few, it is important to set up dedicated collector links through your survey service to ensure you know which methods are working best for you. For example, in our last survey marketing campaign, we realized distributing through our newsletter was virtually entirely ineffective as not one employer completed the survey through the link in our newsletter. While we will still include the link in future newsletters as it is a simple method to employ, we know we should not depend on this method to garner many responses.

### 3. Analyzing the Data

Once you've gathered responses and closed your survey, you can begin analyzing the data. This should be done in two steps. We use SurveyMonkey as our survey service and Excel to analyze the data, but these steps can apply to any survey service and spreadsheet program.

#### STEP ONE Exporting and Cleaning the Data

1. Export the results of your survey to a spreadsheet program - we use Excel
2. Clean (review) the data.
  - a. Remove any incomplete responses. A response is incomplete if they did not answer at least one question that is not a demographics or contact question like name, email, industry, etc.
  - b. Look for duplicate responses from the same employer by checking the organization name column. If they are exact duplicates, simply remove one. If one is more complete, keep the more complete response and remove the other. If both are complete yet the data is different, perhaps the best strategy is to look at the job title of the respondent and choose the response from the person with either the most seniority or the most applicable job title (usually someone in human resources or the owner). Use your discretion for this step.
  - c. Check the selected industry of respondents against the employer name. Employers often have a hard time selecting the proper industry for their business, so you may need to adjust their industry selection as necessary.
  - d. If you did not validate response entry with type in your original survey design (such as requiring a numeric value for a number response), check through to ensure respondents used numbers where appropriate and text where appropriate.

#### STEP TWO Tabulating the Results

It is usually easiest to complete most tabulation using PivotTables in Excel, though you can use any methods for these steps. We typically tabulate results and insert them into tables in a Word document as we go so the results are stored in one document that can be made into a bulletin.

1. For "Yes/No" answer choices you can perform a simple sum of answers.
2. For numeric answer choices like quits, hires, etc., ensure you sum the values of answers.
3. If asking questions about anticipated hires, most hired for positions, and hard-to-fill positions, it is best to group job titles by 3-digit NOC code to get a good idea of the top job titles in each group. This ensures that if employers entered job titles that are very similar, they are captured in an aggregated way.

## 4. Creating the Bulletin

Now that you've analyzed the data, it's time to consider which results should be included in the public bulletin and how you will design the bulletin.

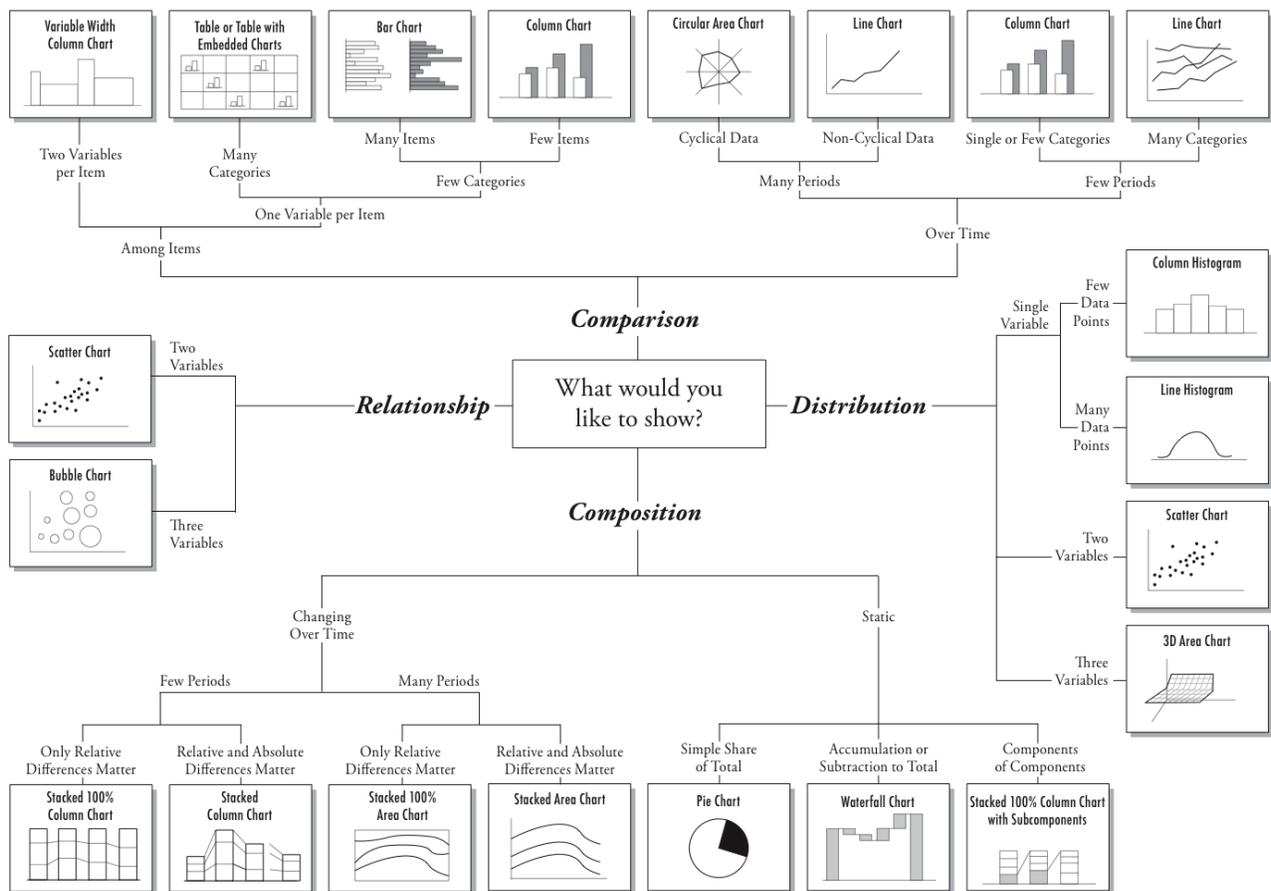
It is up to you to choose which data will be included in the public bulletin. We typically include all data that is relevant to outside stakeholders and can help them in decision-making. For example, it is helpful to employment service providers to know that xx% of employers plan to hire in the next 3 months, and it is helpful to job seekers to know what the top most anticipated hires and hard-to-fill positions are. Never breach confidentiality by including any information that could identify that a specific employer responded to the survey or publishing comments that an employer included in a response and attributing the comment to that employer.

For design, the options range from low-cost bulletins produced and printed in-house to professionally designed and printed bulletins. Our most recent bulletins have been professionally designed and printed, but because we have very similar questions from

survey-to-survey, the design costs are quite low as the designer typically just needs to plug in the data in the already-designed template. Having a professionally designed bulletin can make the data more visually appealing and can make the results feel more dependable and trustworthy. If you would like to spare the expense of professional design, there are easy options like PiktoChart and Google Data Studio that can be used by a member of your team to create a bulletin. We used PhotoShop create our first four bulletins and used PiktoChart to create sector-specific bulletins.

No matter the design option you choose, it is important to keep in mind the branding of your bulletins and data visualization techniques. Your bulletins should have similar colour schemes and font so they are easily recognized in the community and should be laid out similarly for easy comparison. When it comes to data visualization, it is important to choose graphs that suit the data type and to display data in a visually appealing way. Below is a diagram that will help you get started on choosing the right charts for your data.

### Chart Suggestions—A Thought-Starter



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Source: The Extreme Presentation(tm) Method.

## 5. Distributing the Bulletin

You've created a beautiful bulletin! How will you share it? Why should your stakeholders and the community read it? Let's consider the different stakeholder groups that might benefit from reading the bulletin and the best ways to share the bulletin with each.

### Employers

Employers can use the bulletins to monitor the workforce environment and help them understand hiring challenges. For example, if one of the most hired for positions in the last 3 months was Welder and it is also one of the most anticipated hires for the next 3 months, a business that typically hires Welders might raise the wage offered when trying to attract Welders. Employers can also gauge themselves against others, see if their breakdown of separations is the same as others, and think about what they can do to counter an issue like high turnover if that is a challenge for the business as compared to others.

*"[The quarterly survey offers]... a true glimpse as to the Windsor workforce, recruitment challenges, and industry trends. It is a fantastic Human Resources tool to utilize and present to management when faced with shortage of skilled labour and industry specific jobs in the Windsor area."*

– Employer

### How can you share the bulletin with employers?

- Attend events hosted by your local chamber of commerce, where employers will be present
- Share the bulletin with members of your local Human Resources Professional Association (HRPA) chapter to target HR professionals directly
- Give printed copies to employers on your board of directors, working groups, and/or stakeholder groups
- Provide copies to industry associations to share at their meetings and house in their headquarters

- Make presentations to Business Improvement Associations as a way to target many businesses in a community all at once
- Host lunch and learns for employers, detailing how they can use the bulletins and other resources you have in their workforce planning
- Include the bulletin in your next survey request email to employers

### Educators

Educators can use the quarterly bulletins to educate themselves on the needs of our local employers. This information can be shared with students as they explore career opportunities. Elements of the bulletin can be broken down to be included as part of lesson plans, covering elements such as size of businesses in the community, the types of jobs that employers are hiring for and having a difficult time filling, why companies have a hard time with growth and the type of work that is available in the region. These topics can lead to further conversations that explore sectors and companies in further depth and detail. Educators can also use this resource when looking at planning for future programming and for educating parents on what local employers are saying.

### How can you share the bulletin with educators?

- Distribute hard copies at Professional Development days
- Present to meetings of educators such as guidance counsellors
- Include in quarterly emails to educators that share a variety of your resources

### Job Seekers

Job seekers can use these bulletins to understand what the needs of our local employers are. The bulletins will shed light on the types of businesses that are experiencing separations (and in turn may be looking to hire). The bulletins will also help job seekers in having reasonable expectations of what type of work is available in the region, the size of local sectors, and some of the jobs that employers are having a difficult time filling. By learning about barriers to growth, job seekers can be pro-active in better preparing themselves for entering the workforce.

### How can you share the bulletin with job seekers?

- Provide copies to employment service providers to share with their clients and host in their resource areas
- Host booths at job fairs to distribute bulletins and other resources you have
- Include as an additional resource in presentations to job seekers
- Email to lists of current job seekers

### Students

Students can use these bulletins to discover what sectors are hiring youth. They can also start to develop an understanding of the sectoral landscape in the community so that they can better prepare themselves for local careers. Looking at the number of retirements will help students understand what sectors have an aging workforce and where future gaps (and opportunities!) may exist. These bulletins are an excellent tool for starting the process of career navigation by providing an inside scoop on what local employers are saying.

- Provide copies to high school guidance counsellors and post-secondary career advisors to share with students
- Host booths in common spaces in high schools and post-secondary institutions to distribute bulletins and other resources you have
- Attend job fairs for students and share through a booth
- Share during tours of industry for students
- Distribute at evening events for parents and students, such as Grade 8 nights

### Service Providers and Community Organizations

Service providers and community organizations can make use of the bulletins in several ways. First, they can use the bulletins as a tool to keep their workforce knowledge current each quarter and can share the information in the bulletin with their clients and the wider community, expanding the reach of the information. Second, they may want to use the bulletins for grant proposal writing. When applying for funding to start a new program or maintain a current program, it can be useful to have information about hiring rates, especially youth hiring rates, as well as in-demand, hard-to-fill, and anticipated positions.

### How can you share the bulletin with service providers and community organizations?

- Distribute the bulletin to service providers and community organizations that are members of your board of directors, working groups, and/or stakeholder groups
- Attend community networking events to share information about your resources, including the bulletin
- Join committees of community organizations to make your organization and resources known, taking the chance to highlight the bulletins when appropriate

Of course, all groups can benefit from the bulletin being posted to your website, and if you distribute a regular newsletter, including the bulletin in it can be an easy way to reach many groups at once. If you choose to share the bulletin through social media, this can also be a catch-all way to target stakeholder groups.

# The Value of Quarterly Data

Surveying employers each quarter has unique benefits. Here are 4 of the most valuable benefits to a quarterly employer perspective on the workforce.

## 1. Timely and Local Information

Much of the workforce data that is available through Statistics Canada or other sources is updated only annually. Carrying out a survey each quarter ensures you have the most up-to-date workforce data possible. Your survey might also provide you with regional data that isn't available through other sources, giving you a better perspective on your whole community.

## 2. Responsive

Since the survey is carried out each quarter, you can ask specific questions based on changes in the local economy, a specific data need, or anything you need to know. For example, we asked a one-time question to employers about Bill 148 when the legislation was proposed to feel out employers' perspectives in Windsor-Essex.

## 3. Trend Analysis

While you can perform trend analysis on information gathered annually, there is a greater level of detail available if trend analysis can be completed with quarterly information. Perhaps you ask a question about employers' perception of an available workforce locally. When there is a large hire at a local business, you can see if other businesses were affected by it.

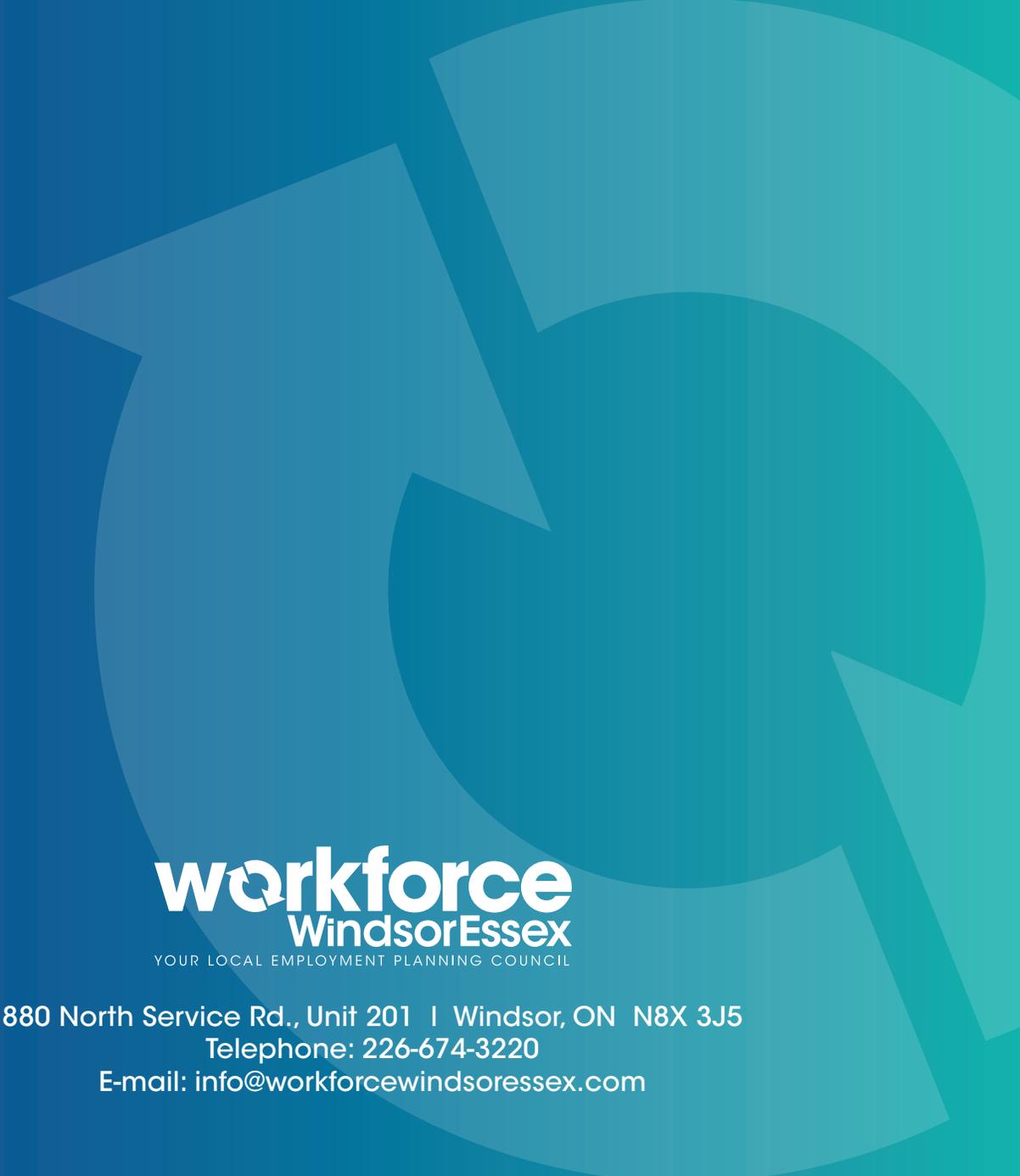
## 4. Media tool

When talking to the media, it's extremely useful to be able to quote a local survey that occurs quarterly and has very current data. Several times, we have spoken to local media and been able to say, "xx% of employers will be hiring in the next 3 months" or "xx% of employers hired in the past 3 months, which helps explain the lower unemployment rate". If you use your data from the survey enough, media will get used to calling you anytime they have a story they know can be supported by the data in the survey.

## Conclusion

Surveys can be a valuable way of collecting timely, responsive, local and comparable labour market information from employers. We know that there are many different types and ways of approaching surveys, and we hope that this document

has given you some strategies to consider when you are looking to release surveys in your community. If you are an established professional in your industry then we hope that this document has re-inspired you in considering your survey options. If you have just started out in your industry then we hope that this resource provided you with a solid foundation as you begin to explore the world of surveying employers. Whatever stage of your career you are in we wish you all the best on your survey journey and we look forward to continued learning on survey strategies.



**workforce**  
**WindsorEssex**  
YOUR LOCAL EMPLOYMENT PLANNING COUNCIL

880 North Service Rd., Unit 201 | Windsor, ON N8X 3J5  
Telephone: 226-674-3220  
E-mail: [info@workforcewindsoressex.com](mailto:info@workforcewindsoressex.com)