



Canadian Employee Relocation Council (CERC)

Interprovincial Mobility Survey

Executive Summary

June 2018

Ipsos Public Affairs

GAME CHANGERS



Introduction

The 2018 Canadian Employee Relocation Council's (CERC) Interprovincial Mobility Survey marks the third edition of the ground-breaking survey first conducted in 2011 and repeated in 2014. The 2018 survey, conducted in partnership with Ipsos Global Public Affairs, reports on the attitudes 1,185 working Canadians who are self-employed or employed in either a full-time or part-time capacity, about their willingness to move for employment purposes. The fieldwork was conducted between April 27th and May 1st, 2018.

Where possible the report has identified certain trends observed since the findings of the 2014 study. The 2018 survey included new questions that asked participants to identify:

- I. the top three provinces they would prefer to move to and;
- II. the top three cities they would prefer to move to.

The report provides insights based on major industry grouping, location and demographic profiles.

The study was made possible [in part] by the generous support of:



About the Canadian Employee Relocation Council

The Canadian Employee Relocation Council (CERC) is a not-for-profit organization dedicated to improving the mobility and deployment of human capital, which are vitally important to Canada's future prosperity. Established in 1982, CERC represents the interests of its members on workforce mobility matters. Many of CERC's members are listed in Canada's Financial Post Top 500.

To further its objectives CERC offers professional development and education programs to its members and individuals employed in the mobility industry. In addition, CERC conducts extensive research on trends that have an impact on workforce mobility.

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About Ipsos

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks fourth in the global research industry.

With offices in 88 countries, Ipsos delivers insightful expertise across five research specializations: brand, advertising and media; customer loyalty; marketing; public affairs research; and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,782.7 million in 2016.

Objectives and Methodology

- This study will inform:
 - Employers with a deeper understanding of the needs of employees in providing relocation supports.
 - Government policy makers with more insights into the 'real barriers' employees face when considering whether to relocate for work
 - Industry sectors and professional groups with an understanding of the challenges to employee mobility between regions and occupations within Canada
- For this survey, a sample of 1,185 employed adults (full-time, part-time, or self employed) from Ipsos' Canadian online panel was interviewed online. The 'credibility interval' for a sample of n=1,185 is +/- 3.2%, 95% of the time.
- Weighting was then employed to balance demographics to ensure that the sample's composition reflects that of the adult population according to Census data and to provide results intended to approximate the sample universe.
- Throughout this report, the 2018 results are tracked against data from the 2014 survey. Statistically significant increases compared to 2014 are identified graphically by green arrows ▲ while statistically significant declines are identified graphically by red arrows ▼. Both the 2014 and 2018 data reflects a base of employed (full-time, part-time, or self-employed) Canadians.
- Significant differences between demographic groups have been identified with shaded boxes – green boxes are used to identify when one demographic group is statistically higher than the other and red boxes when it is statistically lower.
- The sectors have been abbreviated in the sector banner, below is a detailed definition of each of the sectors:
 - M+C+M+T = Mining + Construction + Manufacturing + Transportation;
 - IT + Utilities = Information Technology + Utilities;
 - F+R+P+M+A = Finance + Real Estate + Professional Services + Management + Administration;
 - Wholesale + Retail = Wholesale + Retail
 - Education = Education
 - Health = Health
 - Gov't = Government
 - Arts = Arts
 - Accom = Accommodations
 - Other = Other

Reasons for this Survey

Demographic shifts of unprecedented proportions are underway in many of the world's developed nations, including Canada. There is growing concern among global CEOs about access to skilled talent.

Canadian employers from coast to coast are finding it increasingly challenging to hire the talent they need to meet their business objectives. A survey by IBM¹ found that *"55% of Canadian industry executives surveyed cite finding appropriately skilled workers in local labor markets as a top skills-related challenge."* In a report about Canadian talent shortages published by Manpower Canada², one in three (34%) employers are having difficulty filling vacancies.

Projections by the Conference Board of Canada³, and many other national and provincial research bodies, predict the problem is going to get much worse over the coming decade. One avenue for employers in addressing the skills shortages has been the use of international talent under Canada's immigration programs, but there are limitations on these programs.

The Organization for Economic Cooperation and Development (OECD), has long advocated that more interprovincial labour mobility within Canada would help to address skills shortages. And, as reported by TD Economics⁴, *"interprovincial migration adds grease to an economy's wheels."*

¹Canada's comeback *Turning the skills crisis into a competitive advantage* IBM Institute for Business Value

²Canada Talent Shortage Survey 2016/2017 Manpower Group

³Canadian Employers Need Longer Term Workforce Planning to Stay Competitive: Conference Board of Canada

⁴ Interprovincial Migration Shifts in Canada: TD Economics

Reasons for this Survey (continued)

Indeed, we know that mobility of the workforce contributes to economic growth, promotes innovation, creates jobs, and increases competitiveness. Reality is that less than one per cent of Canada's population move between provinces in a typical year.

Research conducted by the Canadian Employee Relocation Council in partnership with Ipsos Public Affairs in 2014 found that fewer than 2 in 10 Canadians would be willing to relocate to another city in Canada for employment purposes

To increase levels of domestic mobility on a national scale, a deeper understanding of the factors that motivate mobility among working people is needed.

While much is known about the supports and benefits provided by employers those benefits may not always be consistent with the needs and expectations of the modern workforce.

Executive Summary

Survey participants were asked a series of questions about their willingness to relocate for employment purposes under the following scenarios:

- A **full time job** in a city in **another province** where you would have to relocate from where you live now for a minimum of 2 years with a 10% raise and paid moving expenses by your employer
- A **full time job** in a city in **your province** where you would have to relocate for a minimum of 2 years, far enough away that you would have to move, with a 10% raise and paid moving expenses
- A **short-term job for 6 months or less** with your **current employer to another city** in Canada with accommodations supplied
- A **full time contract job for 6 months or less** where you would relocate to **another city in your province** (transportation out and back would be supplied by your employer)
- A **full time contract job for 6 months or less** where you would relocate to **a city in another province** (transportation out and back would be supplied by your employer)

Executive Summary (Continued)

- The overall appetite for employment relocation within Canada, regardless of the incentives or terms being offered, has increased compared to the previous iteration of the inter-provincial mobility survey in 2014.
- One in five working Canadians would relocate, for a full-time job in another city in their province (22%, +6 pts compared to 2014) or a full-time job in another province (18%, +5 pts compared to 2014), regardless of incentives, for a minimum period of two years, far enough away that people would have to move (with relocation costs covered), and a 10% increase in pay. The proportion of working Canadians that would relocate increases significantly if more incentives and the right conditions are on offer. More specifically, around four in ten could be persuaded to relocate, either in-province (45%, -1 pt) or out-of-province (41%, unchanged since 2014), with additional incentives and the right conditions. Therefore, a majority of working Canadians are willing to relocate for a full-time job, either to another city within their province (67%, +5 pts compared to 2014) or to another province (59%, +5 pts compared to 2014) with the right incentive package.
- The willingness to relocate for a short-term contract (of 6 months or less) has also increased since 2014. Half (52%, +6 pts compared to 2014) of working Canadians would be willing to relocate for a full-time contract job for 6 months or less to another city within their province with the right incentive package, while a similar proportion would be willing to relocate for a full-time contract for 6 months or less to another province (48%, +9 pts compared to 2014).
- Those groups most receptive to relocation tend to be workers with less established roots in their communities – men, young adults (under 35), the highly educated, and the unmarried.
- The top three incentives that are motivating Canadians to relocate for full-time work include: a 20% increase in pay (45% in-province, 44% to another province), a guarantee of returning to their current role within 2 years (43% in-province, 38% to another province), and having their employer provide temporary housing until permanent housing is available (30% in-province, 25% to another province). Relocation incentives pertaining to housing accommodations have increased in salience the most, over the past four years. In 2014, only 17% of working Canadians chose temporary housing as an important incentive for them to relocate (compared to 30% in 2018).

Executive Summary (Continued)

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- In terms of the preferred destinations for relocation within Canada, four in ten (38%) working Canadians rank British Columbia first, followed by Ontario (17%) and Alberta (16%). Similarly, the highest proportion of working Canadians (25%) rank Vancouver as their preferred city of relocation, followed by Toronto (10%), Ottawa (10%), and Calgary (10%).
- The results of the inter-provincial mobility survey differ to what was observed in the 2017 Global Mobility Survey conducted by Ipsos on behalf of CERC, which found that Canadians, and global citizens more generally, are less willing to relocate for employment in another country, compared to the previous iteration of that survey in 2012 (<https://www.ipsos.com/en-ca/news-polls/canada-second-spot-employees-would-move-to>). Put another way, at a time when Canadians are less willing to relocate for employment abroad, there is more willingness to do so in Canada, either to another city in their province or to another province.

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