

Our Industry. Our Future.

Challenges and Opportunities for the Convenience Store Labour Market in British
Columbia

June 2018



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Contents

I.	Executive Summary	4
II.	Introduction	9
III.	Methodology	11
IV.	Findings	17
V.	Recommendations.....	51
	Annex 1. Employer Survey Questions	55
	Annex 2. Representativeness of Employer and Employee Surveys	65
	Annex 3. Semi-Structured Interview Guide for Employers	69
	Annex 4. Employee Survey Questions	74
	Annex 5. Semi-Structured Interview Guides for Employees	80
	Annex 6. Detailed Information on Labour Supply-Demand Model	83
	Annex 7. Detailed Workforce Information	90
	Annex 8. Project Steering Committee	97
	Annex 9. References.....	98

Figures

- Figure 1. Employment distribution of c-store related NOC codes for Gasoline Stations (NAICS 4471).....17
- Figure 2. Hourly wages for managerial and non-managerial staff18
- Figure 3. C-store wages compared to wages for relevant NOC codes19
- Figure 4. Full-time/part-time split of c-store employees compared to the Retail Trade sector and the provincial and national economies20
- Figure 5. Workforce distributions based on age.....21
- Figure 6. Workforce distributions based on sex.....21
- Figure 7. Indigenous people in the c-store workforce.....22
- Figure 8. Temporary Foreign Workers in the c-store workforce.....23
- Figure 9. Store count (B.C. compared to all of Canada)24
- Figure 10. Total c-store employment (B.C. compared to all of Canada).....24
- Figure 11. Example of use of in-store technology in the retail industry.....26
- Figure 12. Baseline labour demand growth (2016 to 2026).....27
- Figure 13. Staffing challenges among c-store employers28
- Figure 14. Number of vacancies in c-store NOCs.....29
- Figure 15. Business impact of staffing challenges.....30
- Figure 16. Estimated B.C. labour market participants aged 15-29 (2009 to 2037).....31
- Figure 17. C-store demographics compared to overall demographics in B.C (2016 and 2026).32
- Figure 18. Baseline scenario labour supply and demand for the c-store industry (2016 to 2026).....34
- Figure 19. Impact of increasing the participation of people aged 55 years and older35
- Figure 20. Impact of increasing the participation of women36
- Figure 21. Relative impact of increasing labour productivity.....37
- Figure 22. Relative impact of decreasing the part-time rate38
- Figure 23. Most difficult positions to fill when there is a vacancy39
- Figure 24. Groups targeted during recruitment40
- Figure 25. Employer perspectives on turnover this year compared to previous years.....42
- Figure 26. Employee views on whether they see themselves working in their current job six months from now42
- Figure 27. Employee-reported reasons for leaving positions six months from now44
- Figure 28. C-store net profit margins compared to other sectors.....45
- Figure 29. Employer perspectives on employee engagement.....47
- Figure 30. Skills identified by employees as being required for their work48
- Figure 31. Employee perspectives on volume of work, physical comfort, stress levels and safety.....50

I. Executive Summary

Project Overview

In recent years, convenience store (c-store) employers from across the industry have reported experiencing labour shortages that are negatively impacting their businesses. The Western Convenience Stores Association (WCSA), through the five phases of the Sector Labour Market Partnerships (SLMP) Program, is aiming to better understand and respond to these shortages.

The WCSA completed Phase 1 (“sector engagement”) of the SLMP Program in March 2017. Consultations with a project steering committee, employers, and other stakeholders during this phase revealed that recruiting and retaining appropriately skilled employees at the wage rate employers could afford was the most common labour market challenge facing the industry.

The purpose of this Phase 2 research is to determine if there is an evidence base for Phase 1 findings, to uncover additional insights into the issues affecting the labour market in the industry, and to present potential options to address challenges.

Research

This report draws on a combination of quantitative and qualitative research methods, utilizing both secondary and primary data.

- *Secondary data collection:* Statistical data from a number of sources, including BC Stats, Statistics Canada, and the Canadian Convenience Stores Association, were compiled and reviewed.
- *Primary research:* Primary research was necessary to complement the secondary sources. Employer and employee perspectives were captured through surveys and interviews.
- *Literature review:* A literature review was undertaken to identify relevant factors impacting the workforce in the c-store industry in B.C., the rest of Canada, and a number of jurisdictions outside of Canada, including the United States, Australia, the United Kingdom and Japan.
- *Labour supply-demand model:* A model was created to baseline labour supply and demand, and to provide directional quantitative insights into how changes to certain c-store industry practices might impact the supply of and demand for labour.
- *Stakeholder engagement:* A project steering committee was assembled during Phase 1 and continued to provide guidance during Phase 2.

Key findings

C-store workforce profile: The industry's workforce includes a higher proportion of part-time workers and of younger people than the provincial and national economies, and a comparatively lower representation of older people and of women. While the majority of stores do not employ Indigenous workers or Temporary Foreign Workers, those that do rely heavily on these worker populations.

- From most to least common, typical c-store positions include customer service representatives/cashiers, gas station attendants, store managers, supervisors, food counter attendants and security.
- Wages for managerial positions range from between \$13.00 and \$20.00 per hour. Wages for non-managerial positions are close to the minimum wage, with the majority of wages falling between \$11.35 and \$13.00 per hour. While c-store wages are within the compensation range found in comparable occupations, they are at the low end of the range.
- The industry's workforce includes:
 - a higher proportion of part-time workers than the provincial and national economies;
 - a higher proportion of younger people (i.e. people in the 15 to 24 year old and 25 to 34 year old age groups) than the provincial and national economies;
 - a lower representation of older people (i.e. people in the 35 to 54 year old and 55 years or older age groups); and
 - a lower representation of women than the provincial and national economies.
- While the majority of stores do not employ Indigenous workers, 23% of those stores that do employ this population rely heavily on them (i.e. 50% or more of their workforce are Indigenous) to meet their staffing needs.
- While the majority of stores do not employ Temporary Foreign Workers (TFWs), 41% of those stores that do employ TFWs rely heavily on them (i.e. 50% or more of their workforce are TFWs) to meet their staffing needs.

Staffing challenges: Most employers are experiencing staffing challenges. Given the industry's heavy reliance on younger workers (i.e. people aged 15 to 34), these challenges will likely intensify as this is a shrinking demographic. Based on available data, the demand for labour in the c-store industry is expected to increase steadily for the foreseeable future.

- Most employers are experiencing some kind of staffing challenge, including difficulty recruiting and retaining qualified staff.
- These challenges have a business impact. While the most commonly reported business impact is that store owners have to work longer hours (71%), more than 22% of employers report that they are not able to expand.
- Age demographics alone would suggest that these challenges will intensify. C-stores depend heavily on younger workers (i.e. people aged 15 to 34), and this is a shrinking demographic in B.C.
- Strategies for attracting and retaining youth vary across the industry. Few employers offer mentorship opportunities, and promotion avenues tend to be limited for smaller stores.
- If future demand growth is in line with historical employment growth, and if other factors that influence demand such as part-time rates and the utilization of automation remain constant in

the c-store industry, it is expected that demand for labour will increase by approximately 22% (or approximately 5,500 people) from 2016 to 2026.

High-level options for addressing these challenges: The most promising opportunities for addressing these challenges include increasing the participation of people aged 55 years and older and of women in the c-store workforce. Improving labour productivity through, for example, the adoption of automation may also help reduce labour pressures.

- Relevant benchmarks point to potential opportunities to address labour shortages by:
 - increasing the participation of people aged 55 years and older;
 - increasing the participation of women;
 - improving labour productivity; and
 - decreasing the part-time rate.
- Interviews with employers and employees indicate that there are opportunities to increase the number of people 55 years of age or older and the number of women in the c-store workforce.
- Rates of adoption of automation in the industry are low compared to benchmarks. Interviews indicate that employers who have adopted some form of automation to help reduce labour pressures have found it useful. Those who have not adopted automation indicate that this is due to a lack of knowledge around options, specifically, a limited understanding of how automation might help them, combined with a lack of time to explore options.
- Interviews with employers and employees indicate that decreasing part-time rates relative to full-time rates may not be a viable option.

Recruitment: Most employers do not target specific groups when recruiting. Changes to the Temporary Foreign Worker Program have made the program less accessible to some employers. These factors may limit access to potential worker populations.

- Recruiting staff to work certain shifts, particularly night shifts and/or weekends, is the most common staffing challenge facing employers. “Customer service representative/cashier” appears to be the most difficult position to fill.
- Employers primarily recruit through employee referrals and “word of mouth” and most do not target specific groups when recruiting. Those that do, tend to focus on college/university students and high school students.
- Approximately 70% of those employers who have used the Temporary Foreign Worker Program report that they use it less frequently or have stopped using it altogether as a result of recent changes.

Retention: Wages are the most important consideration when retaining and attracting employees but they are not the only consideration. Employers under-estimate the importance of medical and other benefits.

- Average turnover rates in the industry are approximately 30% and are on the rise.
- Wages are the most important consideration when retaining and attracting employees. This presents certain challenges because of the industry’s low profit margins and high labour costs.

- Yet while wages are important, employees also value other aspects of the job. There is a general alignment between employee priorities and what employers offer their staff, higher wages notwithstanding. However, employers tend to under-estimate the importance of medical and other benefits.

Productivity and engagement of employees: Employers report relatively low levels of productivity and engagement among staff, while employees rank their levels of motivation as quite high. This may point to a mismatch in expectations.

- Employers report relatively low levels of productivity and engagement among staff, with approximately 58% indicating that their staff is somewhat productive or not very productive. In comparison, employees rank their levels of motivation as quite high (i.e. 8 out of 10).
- Findings from the employer and employee interviews indicate that this may be due to a mismatch in expectations, particularly around the quality of customer service, the promotion of products, and the volume of sales.

Skills and training: While the skills required by c-store employees are diverse, the training offered by employers is comparatively narrow. Employers point to skills deficits in younger workers. However, in general, they do not provide tailored training for these workers.

- The skills required by c-store employees are diverse and fit within a continuum of basic skills (e.g. language skills) to high-level management/high responsibility skills (e.g. cash control, addressing customer conflict) and a mix of hard skills (e.g. accounting, inventory management) and soft skills (e.g. teamwork, ability to work under high pressure). However, the training offered by employers is comparatively narrow and focuses primarily on new employee training, customer services training, safety, restricted products and sales.
- Most employers report that their staff have some type of skill gap. However, most employees feel that their skills and experience match the job's requirements. These discrepancies in perspective may be explained in part as a disconnect in expectations. The "soft skill" deficits identified by employers are often gained through experience and with age. However, interviews indicate that employers have the same expectations of younger workers as they do for older age groups and they tend not to provide tailored training to help young people build up the skills they need to perform well in their jobs.

Perceptions of the industry: Approximately 16% of employers feel that current perceptions of the industry have a negative impact on their ability to attract workers.

- Both employers and employees think the general public views a job in the c-store industry as a "survival job" or as a "good job for students or foreign workers/new immigrants."
- Some employers (approximately 16%) feel that these perceptions have an impact on their ability to attract workers.
- About a fifth of employers reported that they would find it useful to have support to improve the industry's branding and image.

Recommendations

A number of recommendations emerge from these findings. These include:

- **Develop youth engagement and retention strategies that maximize opportunities for young workers to enter and advance in the c-store industry.**
- **Enhance outreach to and increase recruitment of populations that are under-represented in the industry compared to relevant benchmarks or that are concentrated among certain employers, particularly retirees (55 years and older), women and Indigenous people (First Nation, Métis or Inuit).**
- **Provide industry-wide recruitment support that responds to the diverse needs of different store types and locations.**
- **Explore options to make the Temporary Foreign Worker Program more accessible to employers.**
- **Improve the employee value proposition, particularly by enhancing employee benefits.**
- **Identify employee engagement drivers and develop strategies to enhance engagement and productivity.**
- **Develop training strategies that respond to the broad set of skills required by c-store employees.**
- **Re-brand employment in the industry to increase its appeal to potential employees.**
- **Increase awareness/knowledge within the industry around the potential benefits of automation and explore options for support with initial uptake and on-going upskilling.**

II. Introduction

The convenience store (“c-store”) industry is engaged in retailing a selection of beverages, snacks, candy, grocery items, gasoline and age restricted products such as tobacco and lottery and, in some cases, alcohol. The Canadian Convenience Stores Association (CCSA), a national association which represents the interests of the convenience retail channel, defines a convenience store as having the following characteristics:

1. Building size of less than 5,000 square feet (460 square meters).
2. Off-street parking and/or convenient pedestrian access.
3. Extended hours of operation, with many open 24 hours, seven days per week and not subject to holiday restrictions.
4. Offer at least 500 stock keeping units (SKUs).
5. Product mix includes a significant selection of beverages, snacks, candy, tobacco, grocery items, gasoline and lottery.¹

CCSA data for 2016 show that the 2,943 c-stores in British Columbia (B.C.) employ approximately 25,300 people,² or roughly 1% of the province’s labour force.³ In recent years, c-store employers from across the industry have reported experiencing labour shortages that are negatively impacting their businesses. The Western Convenience Stores Association (WCSA), through the five phases of the Sector Labour Market Partnerships (SLMP) Program, is aiming to better understand and respond to these shortages and to build a more thorough fact base around the industry’s labour force.

In March 2017, the WCSA completed Phase 1, the “sector engagement” phase of the SLMP Program. Consultations with a project steering committee, employers and other stakeholders during this phase revealed that recruiting and retaining appropriately skilled employees at the wage rates employers could afford was the most common labour market challenge facing the industry. Stakeholders reported a number of factors that contribute to or exacerbate this challenge, including:

- perceptions of the industry in general and its lack of appeal to qualified job seekers;
- misperceptions of the nature of the work involved in a c-store job;
- the cost of living, particularly in the Lower Mainland and the Okanagan;
- health and safety concerns, particularly related to stress on the job;
- municipal regulations around split/full service gas station requirements; and
- federal regulations related to changes to the Temporary Foreign Worker Program that make the program more expensive and time consuming.

The purpose of this Phase 2 research is to determine if there is an evidence base for Phase 1 findings, to uncover additional insights into the issues affecting the labour market in the industry, and to present

¹ Canadian Convenience Stores Association. Canadian Convenience Store Industry: Facts and Figures Report 2014.

² Canadian Convenience Stores Association. Canada’s Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017.

³ This percentage is based on 2016 Labour Force Survey data prepared by BC Stats.

potential options to address challenges. Through a number of research methods, this report responds to the following set of research questions:

1. What are the characteristics of the workforce employed in the c-store industry in B.C.?
2. What are the key factors influencing the demand for labour in the industry?
3. Is the industry affected by labour shortages and, if so, what is the impact of these shortages?
4. What high-level opportunities are available to address labour shortages?
5. What challenges is the industry facing in recruiting and retaining labour?
6. How productive and engaged are workers in the industry?
7. What skills gaps are present in the workforce and what training is available?
8. What are the perceptions of the industry and how, if at all, do these perceptions impact attraction and retention?

The entire c-store industry in B.C. is within scope of this report. According to 2016 industry data, 56% of c-stores are independent, defined by the CCSA as “a retailer that has control over the site’s operations including determining and controlling inventory in the store”, with the remainder defined as “chain” or “corporate” stores.⁴ This report considers both c-stores that sell gas (approximately 42% of all stores according to 2015 data) as well as those that do not.⁵

Based on the Phase 1 findings and further consultation with partners, the following industries from the North America Industry Classification System (NAICS) were used to define the parameters of this study:

- 44512 - Convenience Stores; and
- 44711 - Gasoline Stations with Convenience Stores

Building on Phase 1 and subsequent consultations, the following National Occupational Classification (NOC) codes were used to define the parameters of the study:

- 0621 (retail and wholesale trade managers);
- 6211 (retail sales supervisors);
- 6421 (retail salespersons);
- 6611 (cashiers);
- 6621 (service station attendants);
- 6622 (store shelf stockers, clerks and order fillers);
- 6711 (food counter attendants, kitchen helpers, related support occupations); and
- 6222 (specialists in wholesale trade and retail and wholesale buyers).

⁴ Canadian Convenience Stores Association. Canada’s Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017. Available online at: <https://depquebec.com/wp-content/uploads/2017/09/CCSA-2017-Annual-Facts-Figures-Report.pdf> Accessed on 5 February 2018.

⁵ Canadian Convenience Stores Association. The Canadian Convenience Store Industry Facts & Figures Report 2016

This report is structured around the research questions identified above. Section I provides an executive summary and Section II introduces the report, including its purpose and scope. Section III describes the research methodology. Section IV presents findings which link directly to the research questions and Section V offers preliminary ideas for recommendations that could inform stakeholder strategies moving forward. The annexes offer additional information and are identified accordingly throughout this report.

III. Methodology

To address the research questions, this report draws on a combination of quantitative and qualitative research methods, utilizing both secondary and primary data. A number of quantitative questions could be addressed through either secondary data sources or by drawing on data generated through the surveys conducted for this report. Since secondary data (particularly data from the 2016 Census) are more robust than survey data due to a larger and more representative sample, secondary data are used where possible. Survey results are used primarily to present data that cannot be obtained from other sources.

Secondary data

At the 4-digit NAICS level, two industries were identified as being relevant to convenience stores, Gasoline Stations (NAICS 4471) and Grocery Stores (NAICS 4451). When NAICS data were available at this level, data from Gasoline Stations were used because convenience stores are more aligned to Gasoline Stations than to Grocery Stores in terms of type of work and size of the industry.

Government data sources

B.C. Labour Market Outlook: 2017 Edition

The B.C. Government provides an annual 10-year forecast of skills that will be in demand and predictions about expected job opportunities in the province, together with major trends impacting the workplace. The B.C. Labour Market Outlook: 2017 Edition was used in this report to provide a comparison for c-store labour supply over the next ten years and to provide a comparison for wages in the c-store industry.

BC Stats demographic forecasts

Every year, BC Stats releases a population projection, forecasting future population growth in the province. This dataset was used in this report to help determine baseline labour supply by growing out age groups at the forecasted growth rate.

Canadian Industry Statistics

Canadian Industry Statistics (CIS), published by Innovation, Science and Economic Development Canada, analyse industry data related to a number of economic indicators using the most recent data from Statistics Canada. CIS looks at industry trends and financial information, such as GDP, labour productivity, manufacturing and trade data. CIS were used in this report to examine the c-store

industry's labour and commissions costs as a share of its indirect operating expenses and to compare these costs to other industries.

Job Vacancy and Wage Survey

The Job Vacancy and Wage Survey (JVWS) collects information on job vacancies and wages by occupation, at the national, provincial, territorial and economic region levels. It consists of a quarterly component on job vacancies and an annual component on wages. Additional information is available in relation to the proportion of job vacancies in full- and part-time positions, the distribution of vacancies by level of education and experience, the average hourly wage offered for the vacancies and the duration of job vacancies. The JVWS was used in this report to present trends in job vacancies for a number of relevant NOCs.

Labour Force Survey

The Labour Force Survey (LFS) is a monthly survey which measures the current state of the Canadian labour market and is used, among other reasons, to calculate the national, provincial, territorial and regional employment and unemployment rates. The LFS was used in this report to baseline c-store industry statistics such as the size of the workforce, the unemployment rate, and the part-time ratio against equivalents for the Retail Trade sector (i.e. NAICS 44-45).

Statistics Canada indexes of labour productivity and related variables

These indexes provide quarterly series on labour productivity growth and related variables. They were used in this report to provide a baseline for c-store industry growth.

Survey of Employment, Payrolls and Hours

The Survey of Employment, Payrolls and Hours (SEPH) provides a monthly portrait of the amount of earnings, as well as the number of jobs (i.e. occupied positions) and hours worked by detailed industry at the national, provincial and territorial levels. The SEPH was used in this report to inform measurements of wages of c-store NAICS 4471 (Gasoline Stations) and 4451 (Grocery Stores).

2016 Census

The 2016 Census provides a statistical portrait of the country. It was used in this report to determine baseline splits for labour force status, Aboriginal identity, age groups and sex distribution for c-store NOCs and NAICS 4471 (Gasoline Stations) and 4451 (Grocery Stores).

Industry data sources

The report also draws on industry data published by the CCSA. Specifically, the industry data sources used in this report include the following:

2017 - Canada's Convenience and Fuel Retail Channel: Annual Facts and Figures Report 2017.

The following information from this CCSA report, which is based on 2016 data, was used to inform this report:

- number of c-stores in Canada by type and region;
- location of c-stores by region and size of community;

- sales in c-stores by region and with/without fuel;
- employment by region and full/part-time positions;
- percentage of independent versus chain stores; and
- number of fuel stations by region and c-stores.

Other industry reports prepared by the CCSA from 2009 to 2016 were used to consider how labour market and employment-related variables have changed over time. These include the following:

- *The Canadian Convenience Store Industry Facts and Figures Report 2016.*
- *The Canadian Convenience Store Industry: Facts and Figures Report 2015.*
- *The Canadian Convenience Store Industry: Facts and Figures Report 2014.*
- *State of the Industry Report 2013: The C-store Industry in Canada – Navigating an Uncertain Business Environment.*
- *National 2012 Industry Report – Over-Regulation: A Pivotal Crossroad for the C-store Industry.*
- *A Better Way to Reach Canadian Consumers, 2011 Industry Report.*
- *Local Presence, National Strength: The Asset of Proximity – Convenience Stores in Canada, State of the Industry Report, 2010 Edition.*
- *Local Presence, National Strength: Convenience Stores in Canada, Industry Overview, February 2009.*

It is important to note that the CCSA changed its definition of a c-store in its 2014 report, which uses 2013 data. Specifically, CCSA traditionally defined a convenience store as a retail business that provides the public with a convenient location to quickly purchase a wide variety of consumable products and services, generally consisting of food and gasoline. In 2014, the CCSA broaden its definition to include the following characteristics:

1. Building size of less than 5,000 square feet (460 square meters).
2. Off-street parking and/or convenient pedestrian access.
3. Extended hours of operation, with many open 24 hours, seven days per week and not subject to holiday restrictions.
4. Offer at least 500 stock keeping units (SKUs).
5. Product mix includes a significant selection of beverages, snacks, candy, tobacco, grocery items, gasoline and lottery.⁶

This definitional change resulted in an increase in the number of stores that are considered convenience stores and reduced the comparability of data from previous years. As a result, this report does not draw heavily on industry data prior to 2013.

Primary research

⁶ Canadian Convenience Stores Association. Canadian Convenience Store Industry: Facts and Figures Report 2014.

Primary research was necessary to complement the secondary sources. Specifically, to uncover further insights around the research questions, employer and employee perspectives were captured through surveys and interviews. (Throughout this report, “employer” is defined as “a person/entity with the primary responsibility for recruiting staff and offering wages/salaries for the employees’ work/labour.” “Employee” is considered to be a person working in a c-store either part-time or full-time and who is not also the store’s owner.)

Employer perspectives

An employer survey was conducted to further test the hypotheses emerging from Phase 1 from the perspective of employers, to gather required data that cannot be obtained from other sources, to compare employer and employee perspectives on key issues, and to identify options for strategy development. The employer survey questions can be found in Annex 1.

The WCSA shared the survey with 1,500 employer/manager contacts. In addition, WCSA board members with B.C. operations were asked to circulate the survey and to encourage responses. Project steering committee members were also requested to circulate the survey to their retailers and to encourage completion.

The survey generated 205 responses. The overall margin of error associated with this sample size is +/- 6% at a 90% confidence level. The employer survey did not generate the targeted sample size (i.e. 247 responses) on the aggregate or for specific questions. In addition, independent stores and stores located in rural areas were under-represented in the survey responses compared to relevant benchmarks. (See Annex 2 for more details on the representativeness of the employer survey.)

To nuance the findings from the survey, interviews with employers were conducted. To identify potential interview participants, WCSA contacted close to 40 employers from across the province and organized interviews with 12 employers, including 8 independent stores and 4 chains. Four of the 12 employers interviewed represented stores based in rural locations. The semi-structured interview guide for employers can be found in Annex 3.

Employee perspectives

An employee survey was conducted in order to further test the hypotheses emerging from Phase 1 from the perspective of employees, to gather required data that cannot be obtained from other sources, to develop a baseline for comparing employer and employee perspectives on key issues, and to identify options for strategy development. The employee survey questions can be found in Annex 4.

The WCSA’s 1,500 employer/manager contacts and WCSA board members with operations in B.C. were asked to circulate the survey to employees. Project steering committee members were also requested to share the survey with their retailers for onward forwarding to employees. In addition, Mindfield, a recruiting solutions provider that works closely with the WCSA, circulated the survey to relevant contacts in its B.C. database.

The employee survey generated 404 responses with 77% of respondents completing the entire survey. This represents an overall confidence level of 90% with a margin of error of +/- 4%, and exceeds the study’s targeted confidence level (90%) and margin of error (+/- 5%). Where relevant, a note is made

when the targeted confidence level and margin of error is not reached for responses to specific questions. Independent stores, stores in rural locations, and part-time employees were under-represented in the employee survey as compared to relevant benchmarks. (See Annex 2 for more details on the representativeness of the employee survey.)

To supplement the findings from the employee survey, interviews with employees were conducted. The WCSA reached out to close 200 employees through email and to an additional 30 employees by phone. Interviews were conducted with 15 employees, including 4 part-time employees, 6 employees from stores based in rural locations, 5 individuals over the age of 55, 2 employees between the age of 15 and 24, and 9 women. Nine interviewees represented chain stores and 6 represented independent stores. The semi-structured interview guide for employees can be found in Annex 5.

Literature review

A literature review was conducted to identify relevant factors impacting the workforce in the c-store industry in B.C., the rest of Canada and a number of jurisdictions outside of Canada, including the United States, Australia, the United Kingdom, and Japan and to inform the findings across all research questions.

The literature review included three main components:

1. *Review of convenience store-specific literature from different jurisdictions across and outside of Canada:* This included a review of all relevant posts on the websites of the following:
 - Atlantic Convenience Stores Association
 - Association québécoise des dépanneurs en alimentation
 - Australasian Association of Convenience Stores
 - Britain Association of Convenience Stores
 - Canadian Convenience Stores Association
 - National Convenience Stores Distributors Association
 - National Association of Convenience Stores (U.S.)
 - Ontario Convenience Stores Association
 - Western Convenience Stores Association
2. *Review of recent and relevant articles in industry-specific publications:* This focused on reviewing articles in relevant industry publications, including Convenience Store Decisions, Convenience and Carwash Canada and Convenience Store News.
3. *Review of comparable industries and disciplines, including retail and grocery:* This component included a review of relevant literature from the Canadian Federation of Independent Business, the Canadian Federation of Independent Grocers, the NACS-Coca Cola Retailing Research Council, and the Retail Council of Canada. It has also involved a review of relevant reports/articles by, among others, the Brookfield Institute, the CD Howe Institute, the Conference Board of Canada, Deloitte, The Washington Post, Humetrics, Industry Canada, McKinsey, Mindfield, Nielsen, and the Workforce Institute.

Labour supply-demand model

A model was created using the Government and industry data sources mentioned above as well as the results from the employer and employee surveys. The purpose of this model was to baseline labour supply and demand and to provide directional quantitative insights into how changes to certain c-store industry practices might impact the supply and demand of labour. More details on this model and corresponding data sources are provided in Annex 6.

Stakeholder engagement

A project steering committee was assembled during Phase 1 and continued to offer guidance throughout the course of Phase 2. Specifically, the project steering committee provided feedback on the content of the employer and employee surveys and was consulted on the findings and recommendations presented in the first draft of this report through email and over the phone. The project steering committee was convened to discuss a second draft of this report, focusing in particular on the accuracy and feasibility of recommendations. Project steering committee members were further engaged on the recommendations found in this report through email and over the phone.

IV. Findings

1. What are the characteristics of the workforce employed in the c-store industry in B.C.?

Finding: From most to least common, typical c-store positions include customer service representatives/cashiers, gas station attendants, store managers, supervisors, food counter attendants and security.

According to the employer survey and ordered from most to least common, typical c-store positions include customer service representatives/cashiers, store managers, supervisors, gas station attendants, food counter attendants and security.

Specifically, results from the employee survey indicated that a clear majority of employees (70%) are either customer service representatives/cashiers or gas station attendants. Management and supervisory positions (i.e. store managers, supervisors) make up approximately 27% of employees. There are a limited number of food counter attendant/kitchen helper, security, and other staff.

These results align with the 2016 Census NOC code breakdown of employment for “Gasoline Stations” (NAICS 4471), a proxy for c-stores. Specifically, this data indicates that “cashiers” (NOC 6611), “retail salespersons” (NOC 6421) and “service station attendants” (NOC 6621) account for 74% of employment for Gasoline Stations. Management and supervisory level positions (NOCs 0621 and 6211) make up approximately 24% of employment. There are limited food attendant and other employees, which account for 2% of employment for this industry group.⁷

Figure 1. Employment distribution of c-store related NOC codes for Gasoline Stations (NAICS 4471)

Gasoline Stations (NAICS 4471) by NOC code	Percentage⁸	C-stores Position	Percentage⁹
6611 Cashiers and 6421 Retail salespersons	47%	Customer Service Representative/Cashier	39%
6621 Service station attendants	28%	Gas Station Attendant	31%
0621 Retail and wholesale trade managers	21%	Store Manager	20%
6211 Retail sales supervisors	3%	Supervisor	7%

⁷ Numbers may not add up due to rounding.

⁸ This represents the share of the population in the labour force for NAICS 4471 across the eight NOC codes used in this report. Source: Statistics Canada, 2016 Census of Population, custom request through the B.C. Labour Market Information Office.

⁹ These results are from the employee survey conducted for this report.

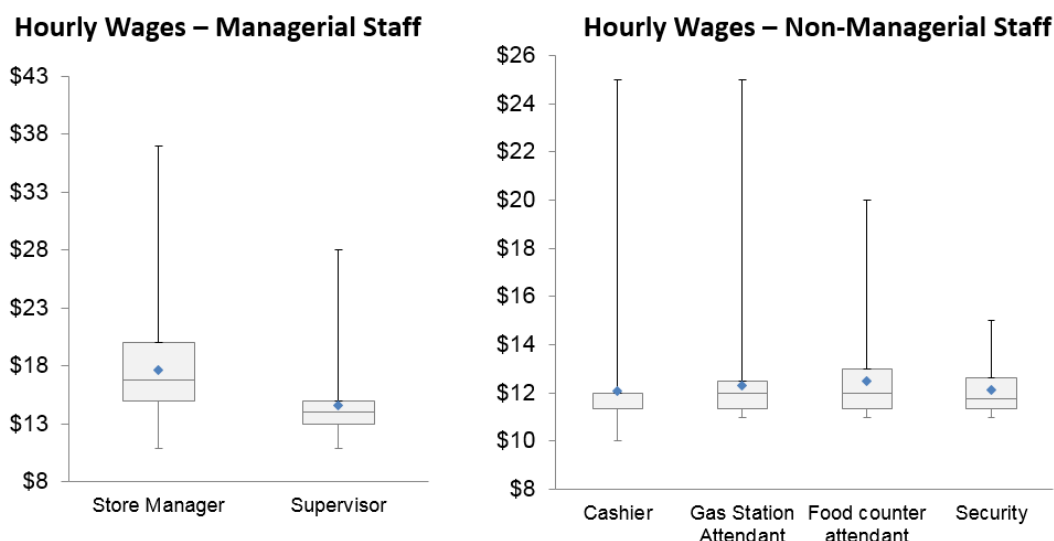
Other ¹⁰	2%	Other ¹¹	3%
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Finding: Wages for managerial positions range from between \$13.00 and \$20.00 per hour. Wages for non-managerial positions are close to the minimum wage, with the majority of wages falling between \$11.35 and \$13.00 per hour. While c-store wages are within the compensation range found in comparable occupations, they are at the low end of the range.

The employer survey revealed that wages for managerial positions (i.e. supervisors, store managers) range from \$13.00 to \$20.00 per hour, with the majority (56.5%) of supervisors earning between \$13.00 and \$15.00 per hour, and the majority (57.7%) of store managers earning \$15.00 and \$20.00 per hour. Wages for non-managerial positions (i.e. customer service representatives, gas station attendants, food counter attendants, and security) are close to the minimum wage, with the majority of wages falling between \$11.35 and \$13.00 per hour.

The figure below illustrates the distribution of wages observed in the industry. It shows the minimum and maximum wage, the lower and upper percentiles, as well as median and average wages. Specifically, the lower stem indicates the minimum wage observed per position. The upper stem represents the highest wage observed per position. The bottom of the box represents the 25th percentile,¹² and the middle line represents the median and the top of the box represents the 75th percentile. The blue diamond represents the average.

Figure 2. Hourly wages for managerial and non-managerial staff



¹⁰ These include 6222 Retail and wholesale buyers (0.2%), 6711 Food counter attendants, kitchen helpers and related support occupations (1%), and 6622 Store shelf stockers, clerks and order fillers (1%).

¹¹ These include the food counter attendant/kitchen helper, security, and “other” survey categories.

¹² For the “Cashier” position, the 75th percentile is the same as the median, resulting in the top of the box being the same as the median line.

A comparison of survey data and data from the B.C. Labour Market Outlook: 2017 Edition indicates that wages for various c-store positions are within the compensation range found in comparable occupations but are at the low end of the range and fall within a much narrower band with respect to the high end of the range.

Figure 3. C-store wages compared to wages for relevant NOC codes

C-Store position	C-Store Wage Range ¹³	Position (NOC)	Wage Range (NOC) ¹⁴
Store Manager	\$15.00-\$20.00	0621 Retail and wholesale trade managers	\$14.25-\$52.40
Supervisor	\$13.00-\$15.00	6211 Retail sales supervisors	\$12.00-\$29.81
Cashier	\$11.35-\$12.00	6611 Cashiers	\$10.85-\$18.00
Gas Station Attendant	\$11.35-\$12.50	6621 Service station attendants	\$10.85-\$15.00
Food counter attendant	\$11.35-\$13.00	6711 Food counter attendants, kitchen helpers and related support occupations	\$10.85-\$16.00

Finding: The industry’s workforce includes a higher proportion of part-time workers and of younger people (i.e. people in the 15 to 24 year old and 25 to 34 year old age groups) than the provincial and national economies, and a comparatively lower representation of older people (i.e. people in the 35 to 54 year old and 55 years or older age groups) and of women.

Using data from Statistics Canada, industry reports and the employer and employee surveys, information was gathered in relation to the industry’s full-time/part-time split, characteristics of its workforce in relation to age and sex, the percentage of individuals who self-identify as Indigenous and the percentage of the workforce that is part of the Temporary Foreign Worker Program. A summary of findings related to the c-store industry’s workforce is presented here. More detailed findings and corresponding sources can be found in Annex 7.

Full-time/part-time split

Approximately 48% of c-store employees work part-time (defined as less than 30 hours per week), compared to approximately 37% for the Retail Trade sector and 26% and 23% for the provincial and

¹³ C-store wage information is sourced from the employer survey conducted for this report.

¹⁴ Wage ranges are presented from low to high and are sourced from WorkBC. B.C. Labour Market Outlook: 2017 Edition. Available online at: https://www.workbc.ca/getmedia/66fd0e7c-734e-4fcb-b1a6-0454862525a6/BC_Labour_Market_Outlook_2017_Edition_Nov_2017.PDF.aspx. Accessed on: 5 February 2018. Minimum wage has subsequently increased to \$11.35 per hour.

national economies, respectively.¹⁵ Data from the CCSA 2017 industry report were used to determine the industry’s part-time/full-time split. This is because definitions of full-time and part-time as published in the 2016 Census available at the 4-digit NAIC level do not align with industry definitions.

Specifically, the part-time/full-time split in the Census available at this level includes three categories: worked full year, full time; worked full year, part time; and worked part year, part time or full time. As Census data for part year includes both full-time and part-time work, it does not allow for a clear comparison with the part-time estimates used by CCSA (i.e. full-time is defined as 30 hours a week or more and part-time as less than 30 hours a week). This limitation exists only at the 4-digit NAICS level. At the 2-digit NAICS level, the part-time/full-time breakdown aligns with the definitions used by the industry. It is important to note that the differences observed between the employer and employee surveys may be due to the fact that more full-time employees responded to the survey compared to part-time employees.

Figure 4. Full-time/part-time split of c-store employees compared to the Retail Trade sector and the provincial and national economies

	2017 CCSA report ¹⁶	2016 Census ¹⁷				Surveys	
		B.C.	B.C.	Canada	Canada	Employee survey	Employer survey
		Retail Trade (44-45)	All NAICS	Retail Trade (44-45)	All NAICS		
Part-time	48%	37%	26%	39%	23%	32%	47%
Full-time	52%	63%	74%	61%	77%	68%	53%

Age distribution

According to data from the 2016 Census, the Gasoline Stations industry group (NAICS 4471) (the closest proxy for c-stores) has a higher proportion of young people (i.e. people in the 15 to 24 year old and 25 to 34 year old age groups) and a lower proportion of older people (i.e. people in the 35 to 54 year old and 55 years or older age groups) than the provincial and national economies. Survey results align with 2016 Census data.

¹⁵ Statistics Canada, 2016 Census of Population. Statistics Canada Catalogue No. 98-400-X2016300.

¹⁶ Canadian Convenience Store Association. Canada’s Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017.

¹⁷ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016300

Figure 5. Workforce distributions based on age

Age distribution	2016 Census ¹⁸			Surveys	
	B.C.	B.C.	Canada	Employee survey	Employer survey
	4471 Gasoline Stations	(All NAICS)	(All NAICS)	-	-
15 to 24 years	30%	13%	14%	31%	35%
25 to 34 years	21%	21%	21%	32%	33%
35 to 54 years	34%	43%	44%	29%	23%
55 years or older	15%	23%	21%	9%	9%

Sex distribution

The percentage of women in the Gasoline Stations industry group (4471) workforce is approximately 45%, compared to 48% in the provincial and national economies. These distributions align with results from the employer and employee surveys.

Figure 6. Workforce distributions based on sex

Sex distribution	2016 Census ¹⁹			Surveys	
	B.C.	B.C.	Canada	Employer survey	Employee survey
	4471 Gasoline Stations	(All NAICS)	(All NAICS)	-	-
Male	55%	52%	52%	59%	59%
Female	45%	48%	48%	41%	41%

Finding: While the majority of stores do not employ Indigenous workers, 23% of those stores that do employ this population rely heavily on them (i.e. 50% or more of their workforce are Indigenous) to meet their staffing needs.

Indigenous people

¹⁸ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

¹⁹ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

2016 Census data indicates that 13% of the labour force in Gasoline Stations (NAICS 4471) who work in the eight NOC codes also found in the c-store industry (i.e. 0621 (retail and wholesale trade managers), 6211 (retail sales supervisors), 6421 (retail salespersons), 6611 (cashiers), 6621 (service station attendants), 6622 (store shelf stockers, clerks and order fillers), 6711 (food counter attendants, kitchen helpers, related support occupations), and 6222 (specialists in wholesale trade and retail and wholesale buyers) identify as “Aboriginal.”²⁰ This is close to three times the percentage of Indigenous people in the province’s overall labour force and more than four times the percentage in the national labour force. Employers reported that approximately 13.7% of their employees self-identify as Indigenous, findings that align with the 2016 Census data.

According to the employer survey this worker population is concentrated in certain stores with close to 66% of employers reporting that they do *not* have any Indigenous employees on staff. Interviews support these findings. Less than half of the employers (5 out of 12) interviewed for this report did not have experience hiring Indigenous workers, primarily due to a lack of exposure to applicants from this population.

Survey results reveal that 23% of employers who do have Indigenous employees on staff rely heavily on this population to meet their staffing needs (i.e. 50% or more of their workforce are Indigenous).

Figure 7. Indigenous people in the c-store workforce²¹

Total number of employers who have hired Indigenous workers ²²	Number of employers that currently employ Indigenous workers	Averages (for stores with > 0 Indigenous workers)			
		Average number of total employees per store	Average number of Indigenous workers per store	Average share of Indigenous workers per total number of employees ²³	Percentage of employers with 50% + of Indigenous workers
164	56	14.5	3.2	22%	23%

Finding: While the majority of stores do not employ Temporary Foreign Workers (TFWs), 41% of those stores that do employ TFWs rely heavily on them (i.e. 50% or more of their workforce are TFWs) to meet their staffing needs.

Temporary Foreign Workers

²⁰ Statistics Canada, 2016 Census of Population, custom request through the B.C. Labour Market Information Office.

²¹ All the numbers used in this table are from the employer survey conducted for this report.

²² Inconsistent responses to relevant survey questions (i.e. respondents selected responses indicating that they have never hired these individuals but then selected one or more additional responses indicating that they have hired these individuals) were dropped from this analysis.

²³ These percentages are weighted by employee count.

A similar trend is observed with Temporary Foreign Workers (TFWs). TFWs are individuals who are hired through the Federal Temporary Foreign Worker Program (TFWP), a program that makes it possible for employers who are unable to fill positions with Canadian citizens or permanent residents to hire workers from abroad.

Survey results suggest that TFWs constitute 19% of the c-store workforce. Survey results further suggest that the TFWP is not broadly used by employers; only 20% of employers currently employ TFWs and most of these are chain stores.²⁴ However, 41% of those employers who hire through the program rely heavily on it to meet their staffing requirements (i.e. 50% or more of their workforce are TFWs).

Figure 8. Temporary Foreign Workers in the c-store workforce²⁵

Total number of employers who have hired TFWs ²⁶	Number of employers that currently employ TFWs	Averages (for stores with > 0 TFWs on staff)			
		Average number of total employees per store	Average number of TFWs per store	Average share of TFWs per total number of employees ²⁷	Percentage of employers with 50% + of TFWs on staff
156	32	18.2	7.9	43%	41%

2. What are the key factors influencing the demand for labour in the industry?

Finding: Store count is aligned with labour demand. Other factors that influence labour demand such as part-time rates and the utilization of automation remain constant.

While store counts today are higher in both Canada and B.C. than in 2013, the number of stores in B.C. has been on a slow decline since 2014, decreasing from 3,130 stores in 2014 to 2,943 stores by 2016, a decline of 6% over this period. As noted earlier in this report, the CCSA changed its definition of a c-store in its 2014 report, which draws on 2013 data. For this reason, store counts prior to 2013 were not used in this analysis.

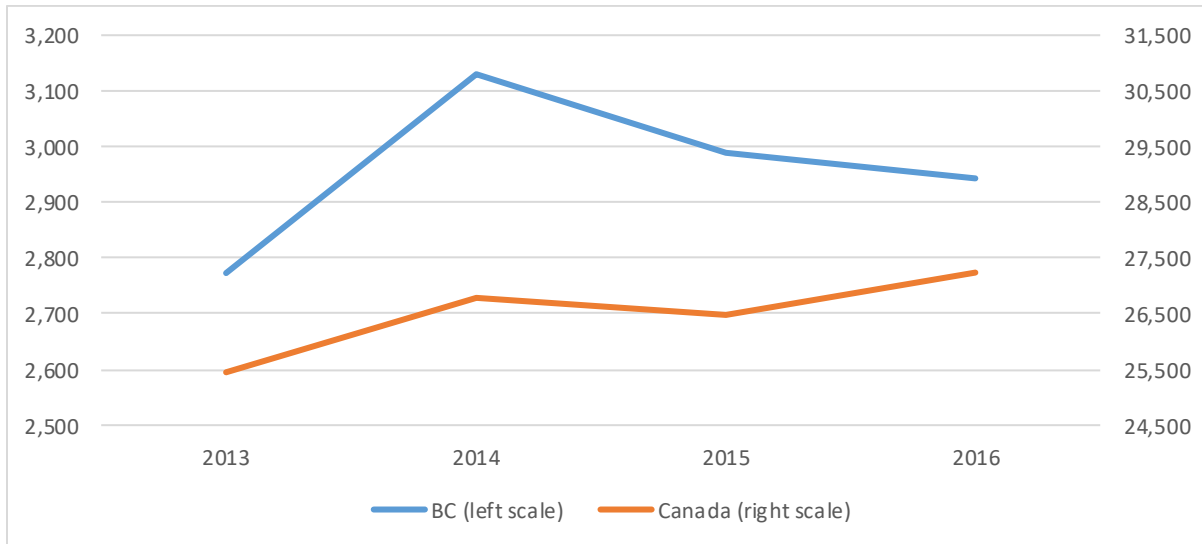
²⁴ Survey results indicate that there are some employers who have used the TFWP in the past but are not currently using it. These employers were counted as currently *not* employing TFWs.

²⁵ All the numbers used in this table are from the employer survey conducted for this report.

²⁶ Inconsistent responses to relevant survey questions (i.e. respondents selected responses indicating that they have never hired these individuals but then selected one or more additional responses indicating that they have hired these individuals) were dropped from this analysis.

²⁷ These percentages are weighted by employee count.

Figure 9. Store count (B.C. compared to all of Canada)²⁸

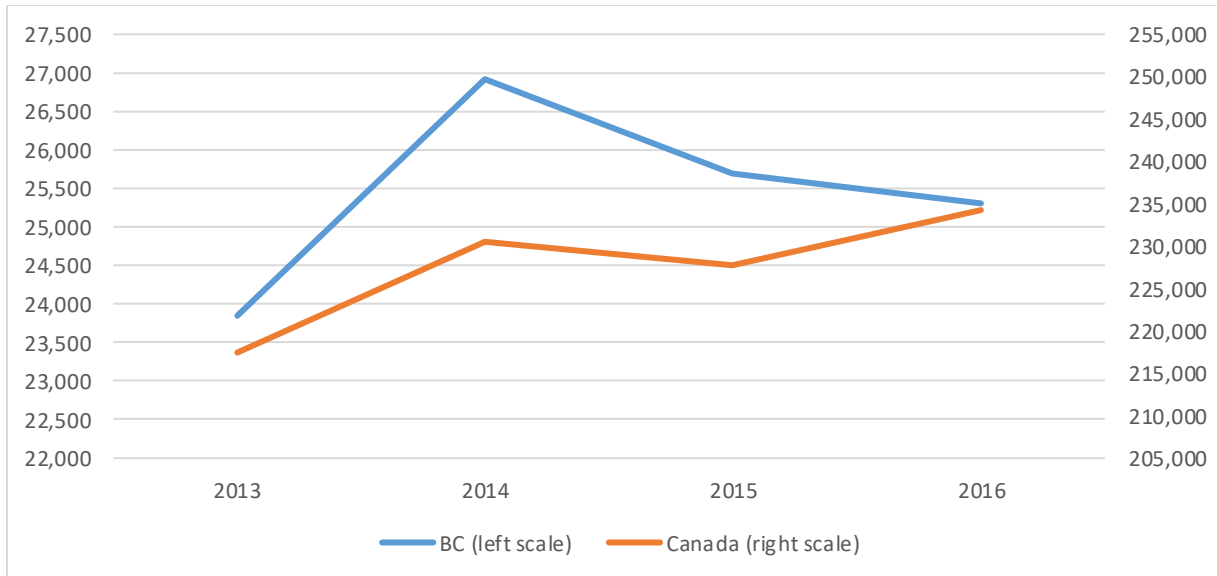


C-store employment has followed a similar pattern to store count. According to CCSA data since 2013, employment per store has been constant at 8.6 employees per store for both Canada and B.C. The figure below indicates that total employment for c-stores follows the same pattern as store count.

Figure 10. Total c-store employment (B.C. compared to all of Canada)²⁹

²⁸ CCSA industry reports from 2014 to 2017 were used as the data sources for this graph.

²⁹ CCSA industry reports from 2014 to 2017 were used as the data sources for this graph.



Given that the number of employees per store has not changed since 2013, it is reasonable to infer that workplace needs (i.e. duties and responsibilities and the effort required to perform them) did not undergo significant changes over this period. Meanwhile, 2016 CCSA data indicate that 48% of employees work part-time (defined as less 30 hours per week)³⁰ and this rate has not changed since 2013.³¹

In addition, employers were surveyed on their use of labour-saving automation (e.g. self-checkouts), another factor that could impact the demand for labour. Forty-eight percent of employers report that their store has not yet adopted any automation, and approximately 35% of employers note that they are unlikely to adopt any new types of automation in the next 3 to 5 years.

These rates of uptake of automation are low compared to retail industry trends. While it is difficult to benchmark the use of automation, a number of studies provide some insight into adoption rates among consumers and within the broader retail industry. For example, in 2015, the Nielsen Global E-commerce and the New Retail Survey polled more than 30,000 consumers in 60 countries and found that 41% of consumers in North America use self-checkout, nearly double the global average.³² This suggests a relatively high prevalence of this technology across North America. In addition, a study by Cornerstone Capital Group and the Investor Responsibility Research Center Institute, which builds on a review of 30

³⁰ Canadian Convenience Store Association. Canada’s Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017.

³¹ Sources for this assessment include all CCSA industry reports since 2014.

³² Nielsen. April 2015. The Future of Grocery: E-Commerce, Digital Technology and Changing Shopping Preferences Around the World. Available online at: [https://www.nielsen.com/content/dam/niensenglobal/vn/docs/Reports/2015/Nielsen%20Global%20E-Commerce%20and%20The%20New%20Retail%20Report%20APRIL%202015%20\(Digital\).pdf](https://www.nielsen.com/content/dam/niensenglobal/vn/docs/Reports/2015/Nielsen%20Global%20E-Commerce%20and%20The%20New%20Retail%20Report%20APRIL%202015%20(Digital).pdf). Accessed on 31 January 2018.

retail companies in the US, found that there is “high” use of several types of retail in-store technology, including mobile devices/apps, self-checkout, etc.³³

Figure 11. Example of use of in-store technology in the retail industry

Technology	Description	Focus	Frequency of Use
Mobile devices	Mobile apps enable consumers to scan a barcode or take a picture of a product to access product info or find other colors and sizes on the retailer’s e-commerce site	Consumer	High
Self-checkout	Customers scan and finalize purchase at terminal	Consumer/Operational	High
Digital kiosks	Touch screens that enable consumers to view product info, access customer reviews, and place orders for delivery	Consumer	High
Proximity beacons	Devices that alert shoppers to promotions or provide sales associates with information on frequent store visitors to deliver high-touch service	Consumer	High
Workforce and task management solutions	Software that analyzes, forecasts, and manages labor scheduling and task management	Operational	High
RFID technology	Radio Frequency Identification (RFID) tags enable enhanced inventory tracking throughout the supply chain	Operational	Medium
Autonomous robots	Smart robots that aid in areas ranging from leading customers to desired products to inventory replenishment	Consumer/Operational	Medium/Low
Smart price tags	Smart price tags can be changed in real time based on demand or other trends	Consumer	Medium/Low
Sensor-based checkout	Contactless checkout by automatic scanning of product as customer walks out of store	Consumer/Operational	Low
Smart shelves	Sensor-based shelves that detect when inventory is low	Operational	Low

Source: Cornerstone Capital Group, Accenture, Company filings

³³ Cornerstone Capital Group and Investor Responsibility Research Center Institute. May 2017. *Retail Automation: Stranded Workers? Opportunities and risks for labor and automation*. Available online at: https://cornerstonecapinc.com/wp-content/uploads/2017/05/Retail-Automation_Stranded-Workers-Final-May-2017_corrected.pdf. Accessed on 31 January 2018.

During interviews, employers who had not yet adopted automation were asked why this was the case. The primary reason cited was a lack of knowledge about automation and its potential benefits. Specifically, employers noted that they do not have enough time to explore the options around automation or they do not see how this type of technology might help them. Those who had adopted some form of automation (e.g. self-checkout, scanning systems, automated inventorying and tax exemptions-related software) noted that these types of technology have relieved pressure on staff and, in some cases, helped to prevent theft.

A number of sources outline factors that might influence the pace of adoption of automation. These include, for example, the technical feasibility of technology, the economic benefits from automation resulting from lower costs, competition for labour, including skills and supply and demand dynamics, and regulatory and social acceptance. Others identify best practices related to adoption. These include developing a proactive approach that treats automation as an economic opportunity rather than a threat, piloting technology before rolling it out across an industry, and establishing industry-wide support mechanisms such as education and training that help alleviate the pressures associated with initial uptake and on-going upskilling.³⁴

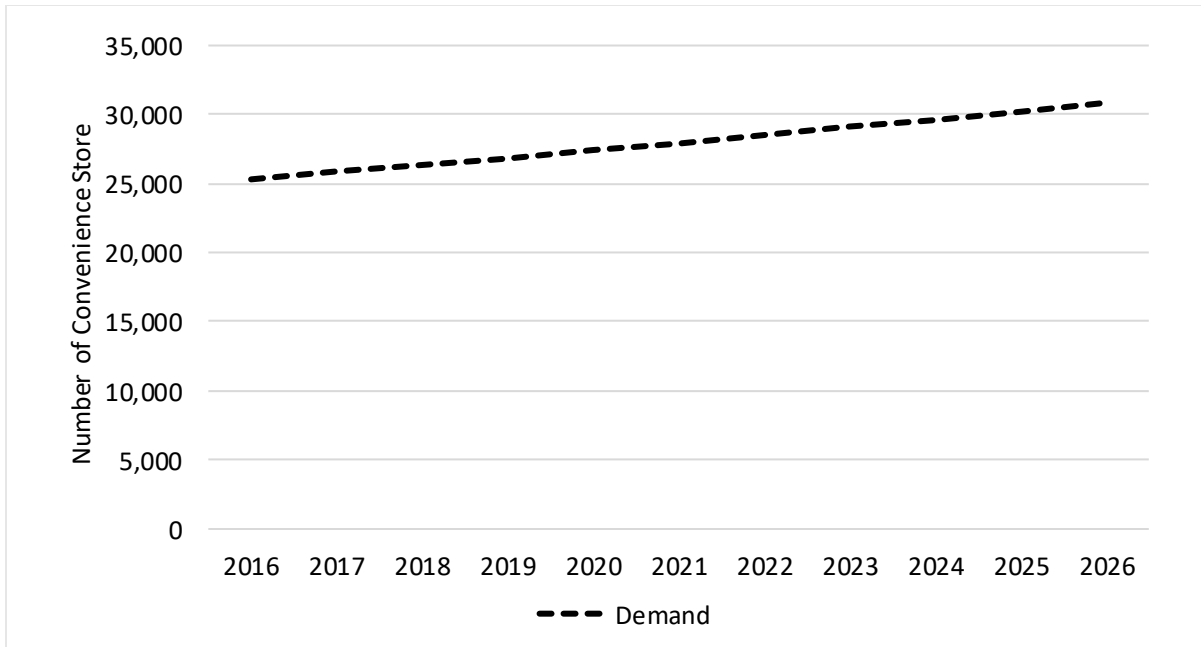
Finding: Based on available data, the demand for labour in the c-store industry is expected to increase steadily for the foreseeable future.

From 2013 to 2016, employment in B.C. c-stores grew from 23,848 to 25,310, an annualized rate of 2%. If future demand growth is in line with historical employment growth and if other factors that influence demand such as part-time rates and the utilization of automation remain constant in the c-store industry, it is expected that demand for labour from 2016 to 2026 will increase at the same rate as historical employment growth. At an annualized growth rate of 2%, this amounts to an increase in demand of approximately 22% or approximately 5,500 people from 2016 to 2026.

It is important to note that the growth rate in labour demand is meant to capture how fast employers can reasonably expect to grow if everything else remains constant and there are no supply constraints (e.g. employers are always able to find enough staff at the current wage rate). This is not a forecast of how actual employment will grow, as that will be determined by a combination of supply and other market factors, including wages and productivity.

Figure 12. Baseline labour demand growth (2016 to 2026)

³⁴ See, for example, Manyika, J., et al. January 2017. *Harnessing automation for a future that works*. McKinsey Global Institute. Accessed on 22 May 2018. Available online at: https://www.mckinsey.com/~media/McKinsey/Global%20Themes/Digital%20Disruption/Harnessing%20automation%20for%20a%20future%20that%20works/MGI-A-future-that-works_Full-report.ashx; and Business for Social Responsibility. April 2017. *Automation: A Framework for a Sustainable Transition*. Available online at: https://www.bsr.org/reports/BSR_Automation_Sustainable_Jobs_Business_Transition.pdf. Accessed on 22 May 2018.



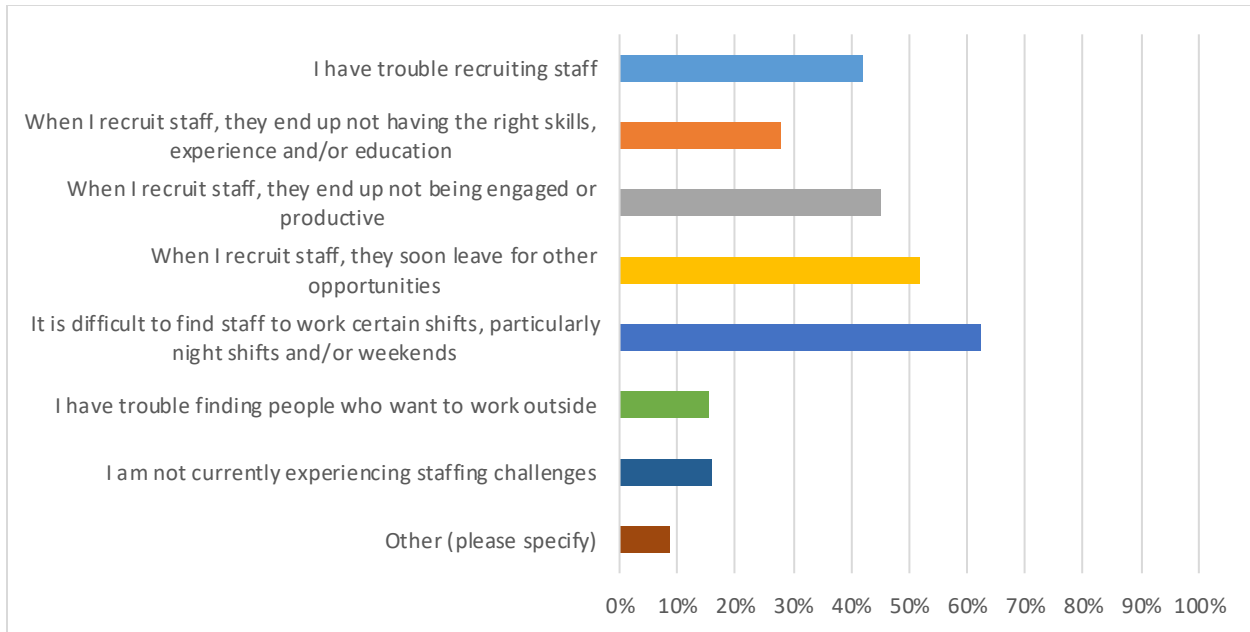
3. Is the industry affected by labour shortages and, if so, what is the impact of these shortages?

Finding: Most employers are experiencing staffing challenges and these have a business impact.

In the employer survey, respondents were asked what kinds of staffing challenges they experience. Sixteen percent of employers reported that they were currently not experiencing staffing challenges and did not select any of the other challenges highlighted in the survey question, while 84% reported that they were experiencing some kind of staffing challenge.³⁵

Figure 13. Staffing challenges among c-store employers

³⁵ All of the 14 “other” responses to this question, with the exception of three, noted some type of staffing challenge.



These findings are reinforced in the literature and the secondary data. For example, a recent survey conducted among US employers found that staffing is perceived as one of the greatest challenges facing c-store employers.³⁶

In addition, data from the JVWS³⁷ have indicated that the number of job vacancies for c-store NOCs³⁸ have been upward trending over the past two years between Q4 of 2015 and Q4 of 2017. All examined NOCs displayed increases in vacancies over the past two years (i.e. eight quarters from Q4 2015 to Q4 2017). The highest number of vacancies are in the Retail salespersons (NOC 6421) occupation, which has experienced 39% more vacancies in Q4 of 2017 compared to Q4 of 2015.

Figure 14. Number of vacancies in c-store NOCs

NOCs	Number of Vacancies ³⁹
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³⁶ Kleiman, M. and John Lofstock. 10 April 2017. *Identifying the C-Store Industry's HR Challenges*. Convenience Store Decisions. Available online at: <https://www.cstoredecisions.com/2017/04/10/identifying-c-store-industrys-hr-challenges/>. Accessed on 31 January 2018.

³⁷ Statistics Canada. Table 285-0003 - Job Vacancy and Wage Survey (JVWS), job vacancies and average offered hourly wage by economic region and detailed National Occupational Classification (NOC), unadjusted for seasonality, quarterly (number unless otherwise noted) (accessed: May 17, 2018)

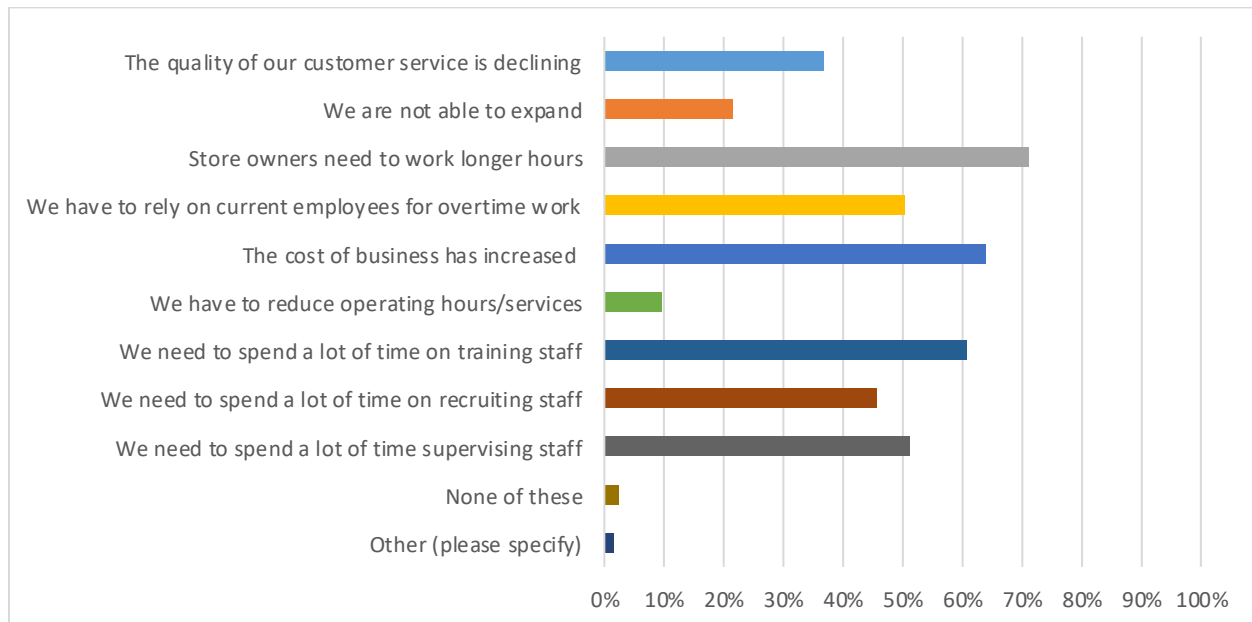
³⁸ The NOCs examined include Retail and wholesale trade managers [0621], Retail salespersons [6421], Cashiers [6611], and Food counter attendants, kitchen helpers and related support occupations [6711]. Other relevant NOCs such as Retail sales supervisors [6211], Retail and wholesale buyers [6222], Service station attendants [6621], and Store shelf stockers, clerks and order fillers [6622] were not examined due to low quality data (i.e. data was suppressed to meet the confidentiality requirements of the Statistics Act).

³⁹ Statistics Canada. Table 285-0003 - Job Vacancy and Wage Survey (JVWS), job vacancies and average offered hourly wage by economic region and detailed National Occupational Classification (NOC), unadjusted for seasonality, quarterly (number unless otherwise noted) (accessed: May 17, 2018)

	Q4 2015	Q4 2016	Q4 2017	Percentage change over two years
Retail and wholesale trade managers [0621]	615	450	725	18%
Retail salespersons [6421]	5,225	6,380	7,285	39%
Cashiers [6611]	1,495	1,340	1,635	9%
Food counter attendants, kitchen helpers and related support occupations [6711]	4,205	4,755	7,535	79%

When asked what impact these staffing challenges are having on their business, the vast majority (97.6%) of respondents identified some type of impact. While the most commonly reported business impact was that store owners have to work longer hours (71%), more than 22% of employers report that they are not able to expand.

Figure 15. Business impact of staffing challenges



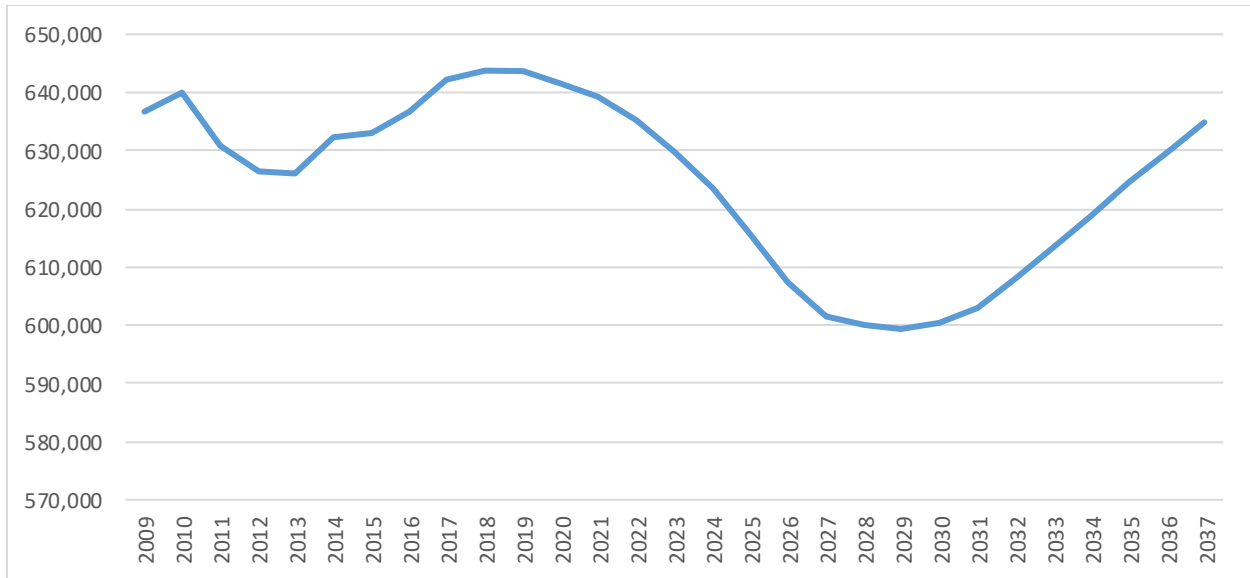
Finding: Age demographics alone would suggest that these challenges will intensify. Strategies for attracting and retaining youth vary across the industry. Few employers offer mentorship opportunities and promotion avenues tend to be limited for smaller stores.

C-stores depend heavily on younger (i.e. people aged 15 to 34) workers. However, this is a shrinking demographic. Based on BC Stats data from 2016, the number of labour market participants aged 15 to 29 is forecasted to decline by 6.3% from 2017 through 2027.⁴⁰

Figure 16. Estimated B.C. labour market participants aged 15-29 (2009 to 2037)⁴¹

⁴⁰ BC Stats population forecasts (May 2017). Available online at: <https://www2.gov.bc.ca/gov/content/data/statistics/people-population-community/population/population-projections>; Accessed on 31 January 2018; and Schrier, Dan. March 2013. British Columbia Labour Force Participation Rate Projections: 2013 Edition. BC Stats. Available online at <http://www.bcstats.gov.bc.ca/Files/8249bb2a-7f29-4db5-825d-45e28e1bc2c8/BritishColumbiaLabourForceParticipationRateProjections2013Edition.pdf> Accessed on: 31 January 2018. This finding is based on the calculations of the research team.

⁴¹ BC Stats population forecasts (May 2017). Available online at: <https://www2.gov.bc.ca/gov/content/data/statistics/people-population-community/population/population-projections>; Accessed on 31 January 2018; and Schrier, Dan. March 2013. British Columbia Labour Force Participation Rate Projections: 2013 Edition. BC Stats. Available online at <http://www.bcstats.gov.bc.ca/Files/8249bb2a-7f29-4db5-825d-45e28e1bc2c8/BritishColumbiaLabourForceParticipationRateProjections2013Edition.pdf> Accessed on: 31 January 2018.



C-stores and other industries that rely on younger workers are likely to be more deeply impacted by these demographic shifts than other industries. Due to lower population growth in the prime age demographic for c-stores (ages 15 to 29), the labour supply of c-store workers is forecasted to grow at a slower rate than the B.C. labour force as a whole. Specifically, data from the B.C. Labour Market Outlook: 2017 Edition forecasts that the total labour supply in B.C. will grow by 10% between 2017 and 2027.⁴² This is faster than the baseline c-store supply growth, which forecasts 6.5% growth from 2017-2027.⁴³ In other words, c-stores and other similar industries that rely heavily on younger workers are likely to find it increasingly difficult to attract younger workers because there will be fewer of them.

Figure 17. C-store demographics compared to overall demographics in B.C (2016 and 2026).⁴⁴

⁴² WorkBC. B.C. Labour Market Outlook: 2017 Edition. Available online at:

https://www.workbc.ca/getmedia/66fd0e7c-734e-4fcb-b1a6-0454862525a6/BC_Labour_Market_Outlook_2017_Edition_Nov_2017.PDF.aspx. Accessed on: 5 February 2018.

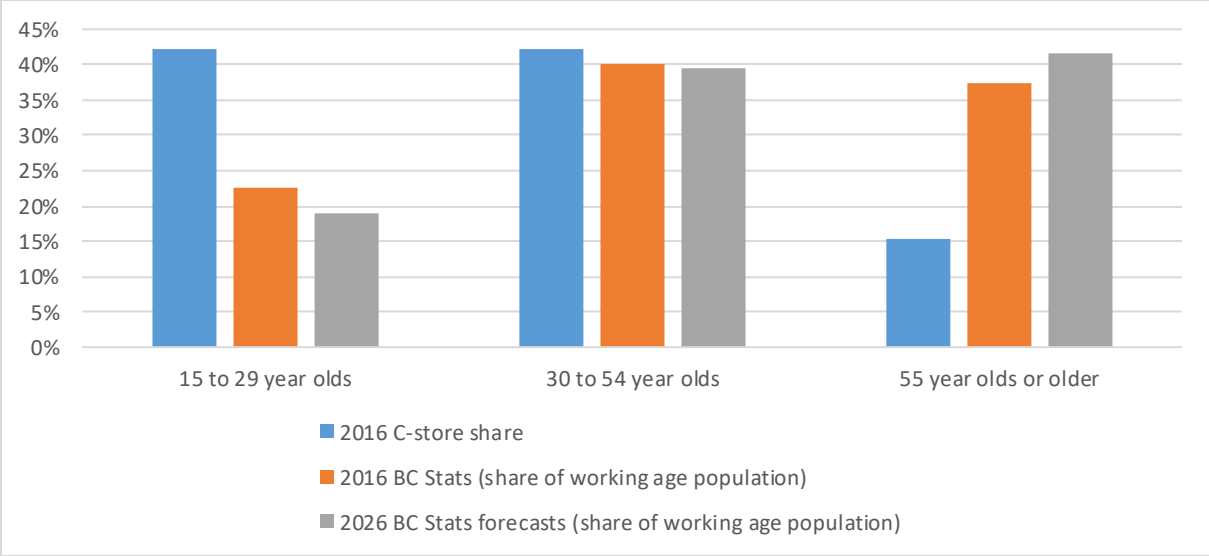
⁴³ This baseline c-store supply is from the labour demand-supply model generated for this report. See Annex 6 for more details and corresponding sources.

⁴⁴ 2016 C-store share is based on 2016 Census data of the labour force for NAICS 4471 - Gasoline Stations (a proxy for c-stores). BC Stats data is from BC Stats population forecasts (May 2017). Available online at:

<https://www2.gov.bc.ca/gov/content/data/statistics/people-population-community/population/population-projections>; Accessed on 31 January 2018. (Working age population is age 15+.) Data related to overall demographics in B.C. are sourced from BC Stats population forecasts (May 2017). Available online at:

<https://www2.gov.bc.ca/gov/content/data/statistics/people-population-community/population/population-projections>; Accessed on 31 January 2018; and Schrier, Dan. March 2013. British Columbia Labour Force Participation Rate Projections: 2013 Edition. BC Stats. Available online at

<http://www.bcstats.gov.bc.ca/Files/8249bb2a-7f29-4db5-825d->



There may be opportunities for c-stores to tap into youth who are “Not in Employment, Education or Training” (NEET) to find potential workers. According to the LFS, there were approximately 86,000 people between the ages of 15 and 29 in the NEET category in B.C. in 2017, approximately 10% of the total population of people aged 15 to 29 in B.C.⁴⁵ As the c-store industry relies on young, entry-level workers, and given that the industry faces labour shortages that are likely to intensify, it may be a good fit for NEET youth seeking employment.

Indeed, a number of similar industries have developed strategies to attract this demographic. For example, the US-based “100,000 Opportunities Initiative” is a coalition of lower wage, largely retail or food and beverage employers that are focused on connecting youth to employment and career development opportunities in their respective industries.⁴⁶

However, while some industries are making a concerted effort to attract and retain youth, including NEET youth, and to prepare them for employment, this appears to be a gap for the c-store industry. In interviews, employers who had experience hiring younger staff were asked if they provide any mentoring or promotion opportunities aimed at helping them build a career in the industry. Most employers interviewed (11 out of 12) indicated that they do not provide these kinds of opportunities, primarily because their stores are too small to promote staff regularly. Those employers who do offer promotion or mentoring opportunities indicated that this approach had a positive impact on their ability to attract and retain younger workers.

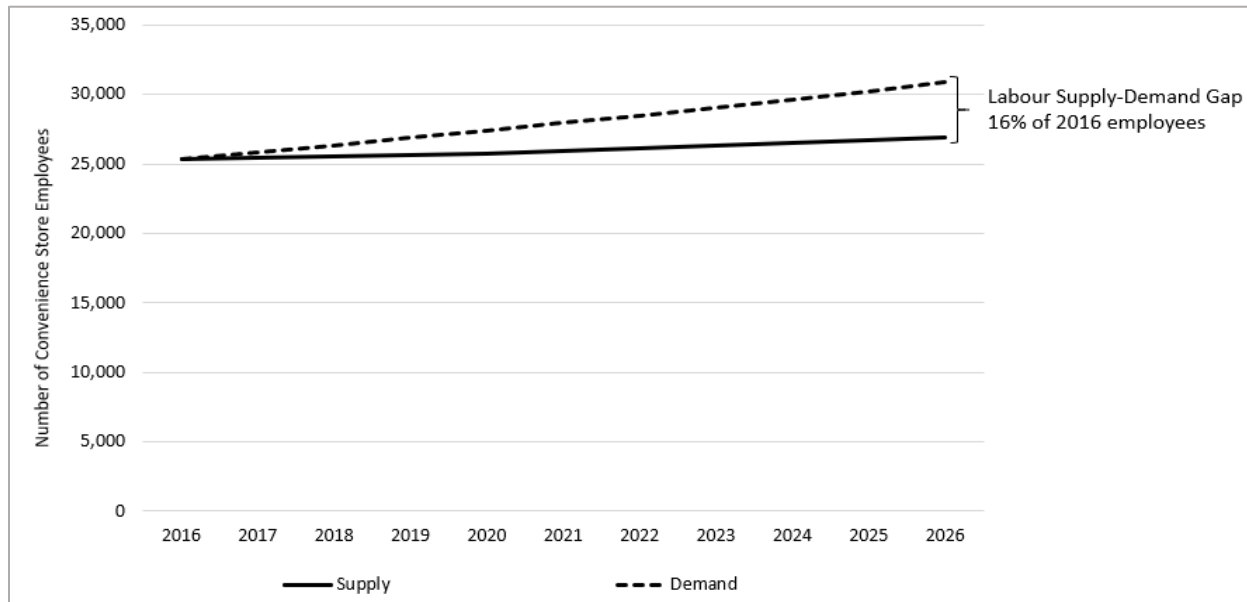
[45e28e1bc2c8/BritishColumbiaLabourForceParticipationRateProjections2013Edition.pdf](https://www150.statcan.gc.ca/n1/pub/282-0095/2013001/article/11811-eng.htm) Accessed on: 31 January 2018. These findings are based on the calculations of the research team.

⁴⁵ Statistics Canada. Table 282-0095 - Labour Force Survey estimates (LFS), by full- and part-time students during school months, sex and age group, annual (persons unless otherwise noted) Accessed on: 11 January 2018.

⁴⁶ See <https://www.100kopportunities.org/about-us/> Accessed on 28 March 2018.

In the absence of changes from market adjustment factors, by 2026, there will be a labour demand-supply gap of 3,945 people, or ~16% of the number of people employed in 2016. (This labour supply gap is only theoretical as factors such as wages, and growth plans will adjust to the labour situation.)

Figure 18. Baseline scenario labour supply and demand for the c-store industry (2016 to 2026)⁴⁷



4. What high-level opportunities are available to address labour shortages?

Finding: Relevant benchmarks point to potential opportunities to address labour shortages by increasing the participation of people aged 55 years and older, increasing the participation of women, improving labour productivity, and reducing the part-time rate.

Drawing on earlier findings surrounding the c-store industry’s workforce and related benchmarks, the labour supply-demand model generated a number of scenarios to identify opportunities to close the forecasted labour supply-demand gap.⁴⁸ Specifically, the following opportunities were analyzed:

Supply-side opportunities:

- Increase the participation of older workers (55+)
- Increase the participation of women

Demand-side opportunities:

⁴⁷ This draws on the demand baseline presented earlier in this report and described in more detail in Annex 6.

⁴⁸ It is important to note that these levers were examined in isolation and are not additive. It is likely that all reasonable levers should be adjusted, if possible, in order to fill the forecasted labour supply-demand gap.

- Improve labour productivity
- Decrease in the part-time rate

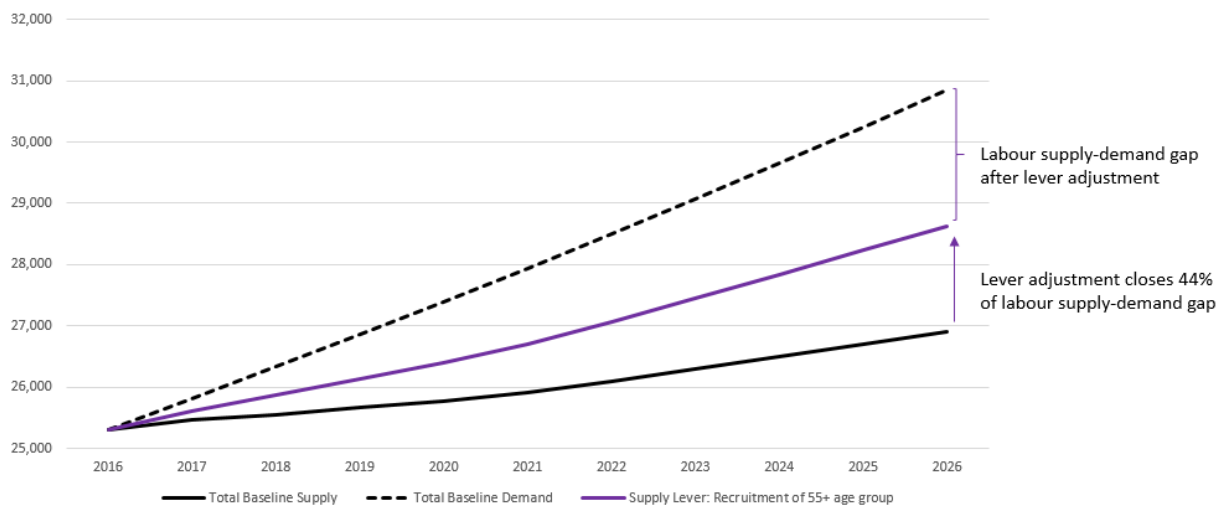
A summary of these opportunities is presented here. (See Annex 6 for more details on these scenarios.)

Supply-side opportunities

Increasing the participation of people aged 55 years and older

The overall percentage of people aged 55 years and older in the B.C. labour force is 22.6% compared to 15.4% in NAICS 4471 - Gasoline Stations (a proxy for c-stores).⁴⁹ Increasing the share of c-store workers from this age group from 15.4% to 22.6%, a seven percentage point increase, would result in 1,717 more workers over 10 years, or 44% of the supply-demand gap by 2026.⁵⁰

Figure 19. Impact of increasing the participation of people aged 55 years and older



During interviews, employers were asked if there were any barriers or challenges facing people aged 55 years and older vis-à-vis finding and keeping a job in the c-store industry. During interviews, a small number of employers (2 out of 12) noted that the physical nature of the job may prevent people from this age demographic from performing some tasks, specifically pumping gas or standing for a full 8-hour shift. Almost all those interviewed (11 out of 12) indicated that there are opportunities to increase the number of people 55 years of age or older in the c-store workforce. During the employee interviews, none of the 5 employees who are 55 years of age or older reported facing any age-specific barriers or challenges related to their job. When asked if there were aspects of their job that may be less appealing to older people than to younger workers, 1 of the 5 indicated that the need to learn computer skills might make employment in the c-store industry less appealing to people aged 55 years and older.

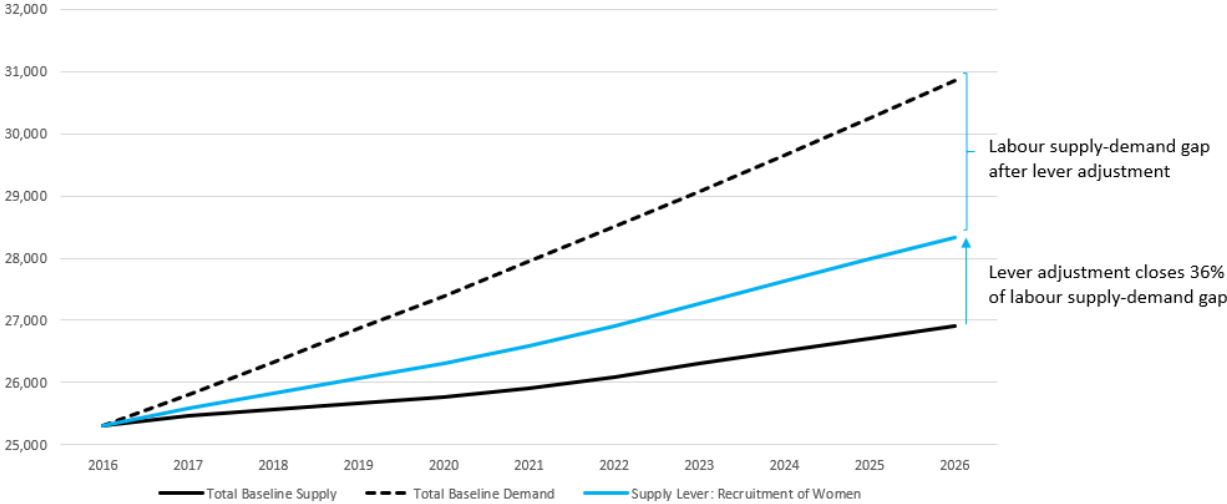
Increasing the participation of women

⁴⁹ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

⁵⁰ Numbers may not add up exactly due to rounding.

The overall percentage of women in the B.C. labour force is approximately 48.0% compared to approximately 45.2% in NAICS 4471 - Gasoline Stations (a proxy for c-stores).⁵¹ Increasing the share of c-store workers who are women from approximately 45% to 48% would result in a 1,430 increase in the number of workers over 10 years, or 36% of the labour supply-demand gap. This would require a three percentage point increase in the share of women working in the industry.

Figure 20. Impact of increasing the participation of women



During interviews, employers were asked if women faced certain challenges or barriers in finding and keeping a job in the c-store industry. A number of employers (4 out of 12) noted that concerns over safety meant that they tried to avoid putting female employees on evening shifts on their own. All those interviewed (12 out of 12) indicated that there are opportunities to increase the number of women in the c-store workforce. In the employee interviews, none of the 9 women interviewed reported facing any barriers or challenges to obtaining their jobs in the c-store industry specifically because they are women. When asked if there are aspects of their job that may be less appealing to women, 3 out of the 9 respondents pointed to safety concerns when working alone and the physical nature of some of the work required (i.e. pumping gas and/or lifting heavy objects).

Demand-side opportunities

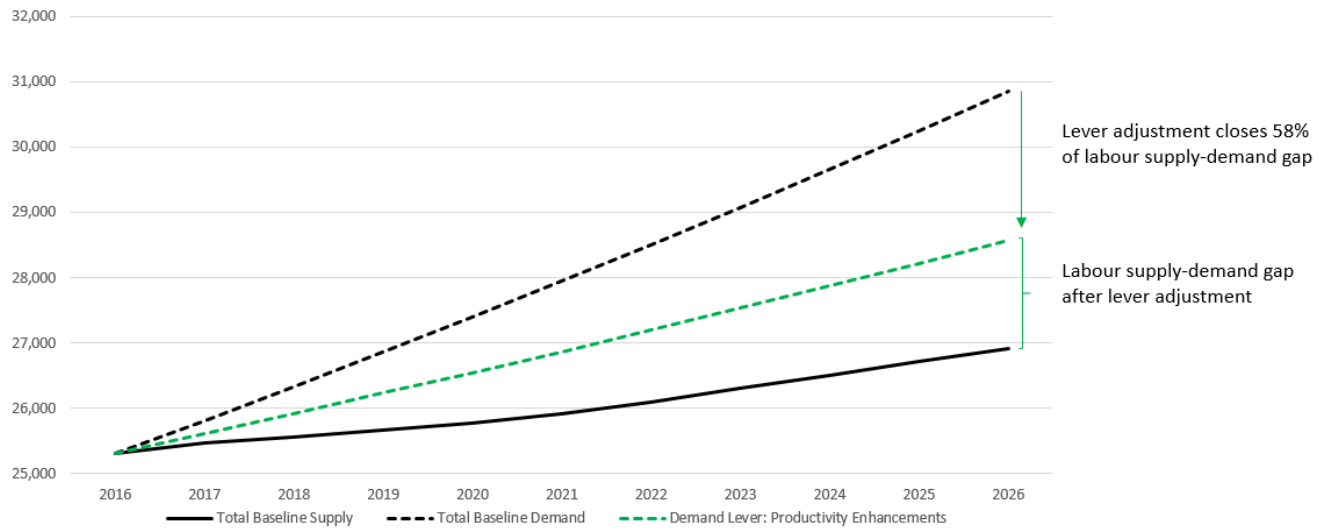
Improving labour productivity

While there is no existing baseline for labour productivity, the labour supply-demand model examined the impact of increasing labour productivity by 8% over 10 years, the growth pattern in Canada from 2006-2016, according to Statistics Canada.⁵² Common ways of increasing labour productivity include

⁵¹ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290
⁵² Statistics Canada. Table 383-0012 - Indexes of labour productivity and related variables, by North American Industry Classification System (NAICS), seasonally adjusted, quarterly (index, 2007=100) (accessed: 5 February 2018)

expanding the use of labour-saving automation (e.g. self-checkouts), and increasing the output of individual employees. Improving labour productivity would reduce labour demand by 2,285 workers, or help close the demand-supply gap by about 58% by 2026.

Figure 21. Relative impact of increasing labour productivity



Interviews revealed that those employers who have adopted some form of automation found that technology had helped relieve pressure on staff as well as prevent theft. Those who have not yet adopted automation indicated that they do not have enough knowledge about its direct value or have not had enough time to explore how automation might help reduce pressure on staff.

Decreasing the part-time rate

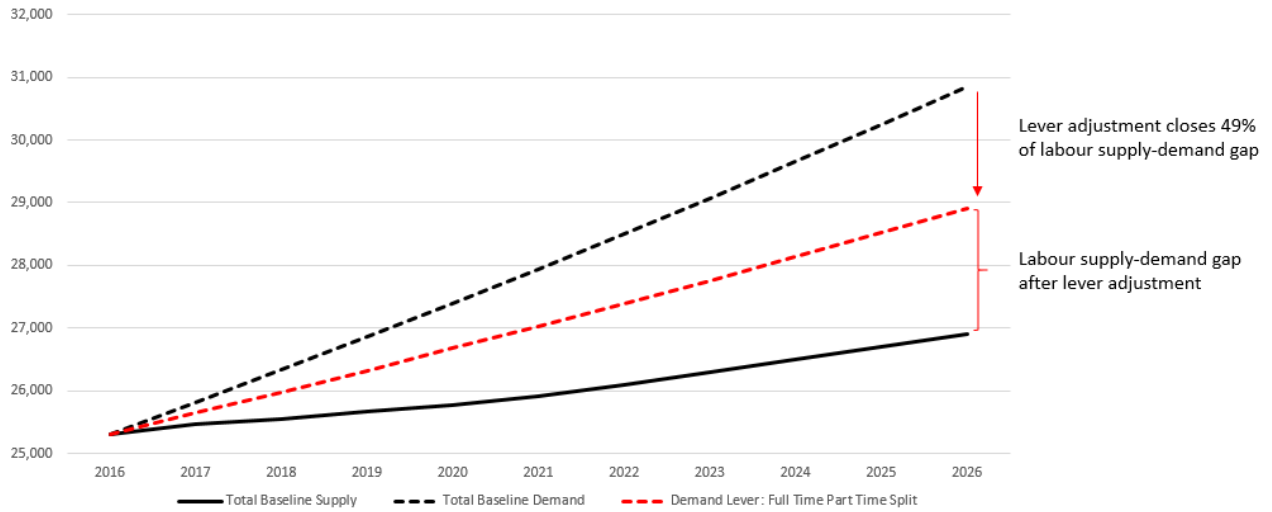
Full-time/part-time split

Approximately 48% of c-store employees work part-time (defined as less than 30 hours per week), compared to approximately 37% for the Retail Trade sector and 26% and 23% for the provincial and national economies, respectively.⁵³ Data from the CCSA 2017 industry report were used to determine the industry’s part-time/full-time split because, as noted earlier in this report, definitions of full-time and part-time in the 2016 Census available at the 4-digit NAICS level do not align with industry definitions. Decreasing the part-time percentage in the c-store labour force from 48% to 37% would reduce the number of workers needed by 1,952 over 10 years, or about 49% of the gap by 2026. This would require a decrease in the part-time rate by 10 percentage points.⁵⁴

⁵³ Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016300.

⁵⁴ Numbers may not add up to rounding.

Figure 22. Relative impact of decreasing the part-time rate



Interviews with employers revealed that adjusting this “lever” may not in fact prove to be a viable option. Some (3 out of 12) employers pointed to the benefits of increasing full-time rates, noting in particular that full-time employees tend to be more engaged than part-time workers and that full-time options (e.g. compensation packages) tend to be better for employees. However, despite these potential advantages, all employers interviewed (12 out of 12) indicated that they are not in the position to increase the number of staff that are working full-time compared to part-time citing the high costs associated with converting staff from part-time to full-time, the fact that seasonal slow downs require part-time options, and the preference expressed by some employees to work part-time over full-time. In addition, the part-time employees that were interviewed for this report indicated that they preferred to or needed to work part-time rather than full-time hours.

5.

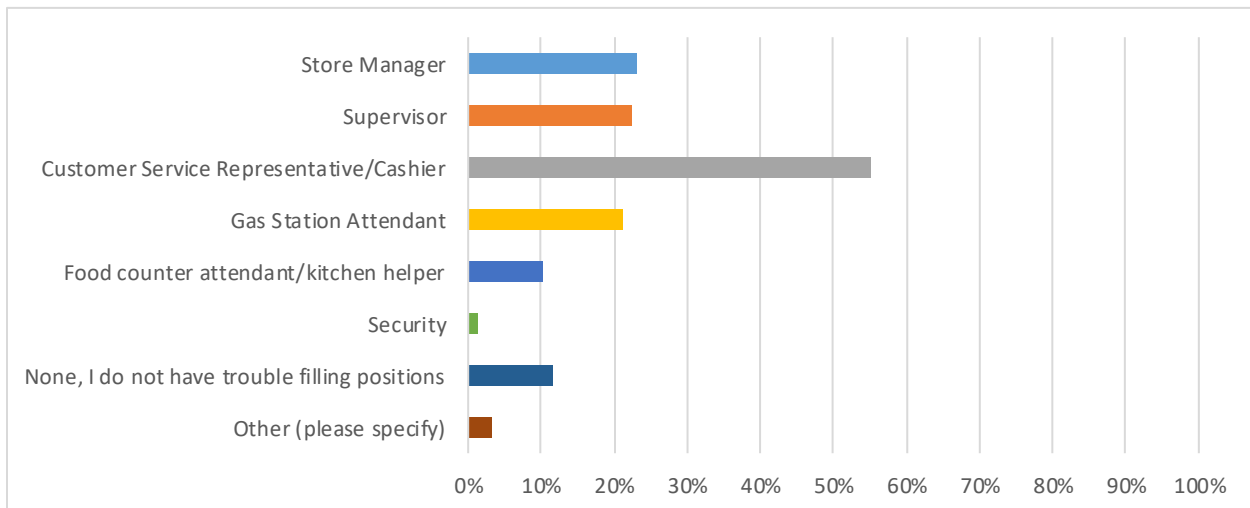
What challenges is the industry facing in recruiting and retaining labour?

Finding: Recruiting staff to work certain shifts, particularly night shifts and/or weekends, is the most common staffing challenge facing employers. “Customer service representative/cashier” appears to be the most difficult position to fill.

The employer survey asked employers what kind of staffing challenges they are facing. Results revealed that the most common staffing challenge relates to finding staff to work certain shifts, particularly night shifts and/or weekends with 62% of employers identifying this as a challenge. Employer interviews indicated that, in some cases (2 out of 12), these challenges have led stores to reduce operating hours, particularly night-time hours. These findings align with employer survey results, which revealed that 10% of employers have had to reduce operating hours/services due to staffing challenges.

Employers identified customer service representative/cashier, followed by store manager and supervisor as the most difficult positions to fill when there is a vacancy. Specifically, over half of employers (55%) identified customer service representatives/cashiers positions as the most difficult to fill compared to approximately 20% for store managers and supervisors.

Figure 23. Most difficult positions to fill when there is a vacancy

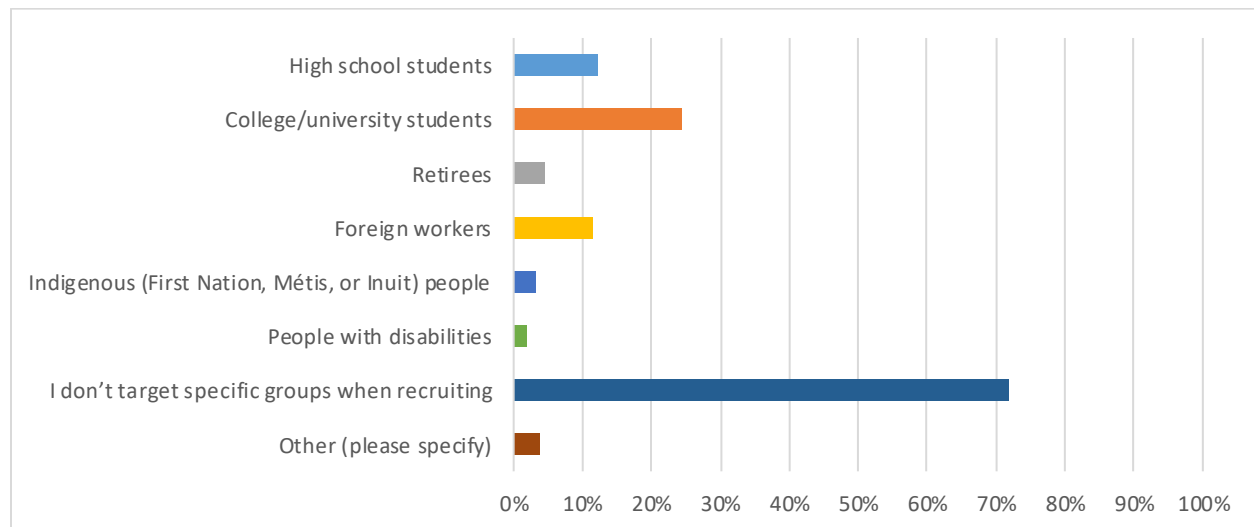


Finding: Employers primarily recruit through employee referrals and “word of mouth” and most do not target specific groups when recruiting. Those that do, tend to focus on college/university students and high school students.

Employee referrals and “word of mouth” are the most common recruitment tools used by employers, followed by “putting a help sign in the window”, and “using online job boards”. These align with the tools used by employees. Most employees (62%) report finding their current jobs through friends or employee referrals with no significant differences among age groups.

Most employers do not target specific groups while recruiting. Those that do, tend to focus on college/university students and high school students. Other populations, such as retirees, Indigenous (First Nations, Métis, or Inuit) people, and people with disabilities are specifically targeted by less than 5% of employers. Interviews indicated that employers tend not to target specific groups while recruiting because they are focused on reaching out to as many people as possible and targeting certain populations might limit their options. This is particularly true for stores based in smaller communities.

Figure 24. Groups targeted during recruitment



A review of the literature suggests that employee referrals are both common and effective in filling vacancies. One study found that employee-referred candidates are three times more likely to be a good match for the job because employees give these candidates much more detailed information about the job requirements and working conditions.⁵⁵ However, relying primarily on employee referrals may limit employers to the same or a similar labour pool. A number of studies suggest a correlation of traits in referrer-referree relationships. For example, research by the Federal Reserve Bank of New York found that “most referrals take place between a provider and a recipient with similar characteristics in terms of age, gender, race/ethnicity, education, and staff level.”⁵⁶

Finding: Approximately 70% of those employers who have used the Temporary Foreign Worker Program report that they use it less frequently or have stopped using it altogether as a result of recent changes.

In 2014, changes were introduced to the TFWP. For example, the per worker application fee more than tripled to a non-refundable \$1000.⁵⁷ In addition, limitations on the percentage of “low wage” positions

⁵⁵ Kleinman, Mel. October 2014. *Recruit the Best (& Skip the Rest)*. Convenience Store Decisions. Available at <http://www.cstoredecisions.com/2014/10/01/recruit-best-skip-rest/>. Accessed on 24 January 2018.

⁵⁶ Brown, Meta et al. June 2013. *Do Informal Referrals Lead to Better Matches? Evidence from a Firm's Employee Referral System* Federal Reserve Bank of New York Staff Reports. Available online at https://www.newyorkfed.org/medialibrary/media/research/staff_reports/sr568.pdf. Accessed on 4 February 2018.

⁵⁷ The original fee was \$275 per applicant.

(i.e. positions that earn less than approximately \$20.00/hour), together with restrictions related to regional unemployment rates, were introduced.

Results from the employer survey conducted for this report suggest that 30% of employers, most of which are chains, report that they have used the TFWP to hire staff.⁵⁸ However, for this group of stores, recent changes have had an impact. Approximately 70% of the employers that have used the program report that, because of recent changes, they use it less or have stopped using it altogether, with chains being more likely than independents to indicate that they have reduced or discontinued their use of the program.

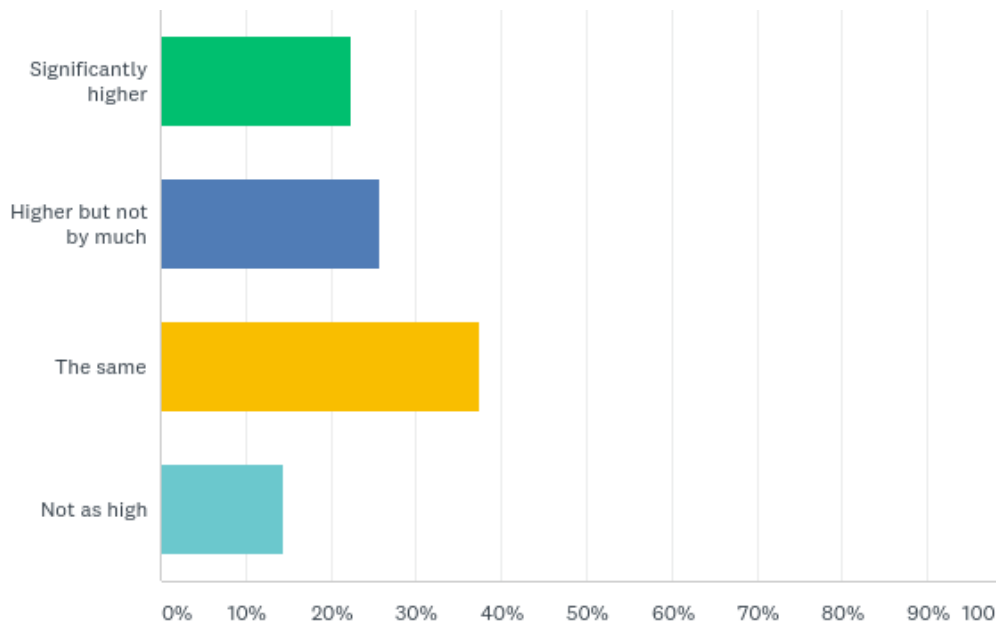
Finding: Average turnover rates in the industry are approximately 30% and are on the rise.

Results from the employer survey indicate that average turnover rates in the industry are approximately 30%⁵⁹ and appear to be on the rise with about half of all employers reporting that turnover is either “significantly higher” or “higher but not by much” this year compared to previous years. Interviews with employers did not reveal any coherent set of explanations for rising turnover rates. They also suggest that employers who have recently experienced higher turnover rates have not undertaken efforts to help reduce the impact of turnover, including for example more efficient training or on-boarding process.

⁵⁸ Responses from employers that indicated “other” (n=8) when asked if they had ever used the TFWP were dropped from this analysis.

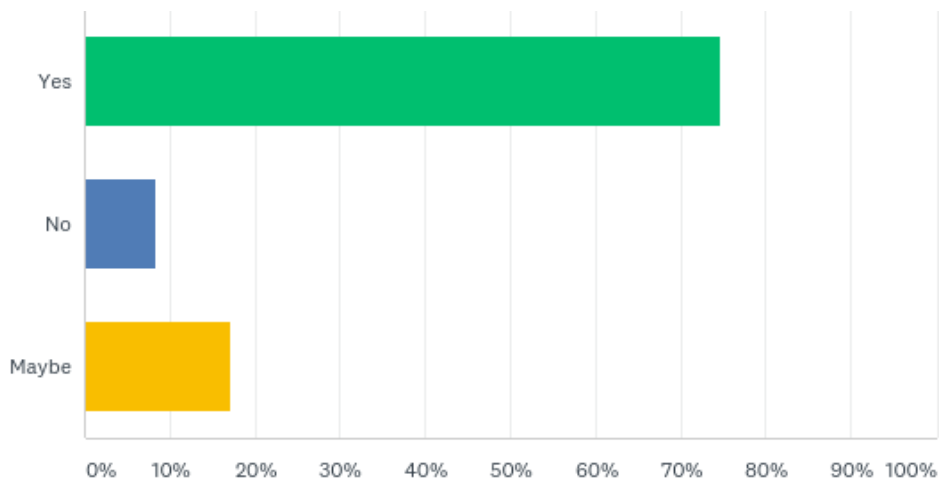
⁵⁹ This question asked employers to report on the percentage of employees that leave over the course of a typical year.

Figure 25. Employer perspectives on turnover this year compared to previous years



These findings are consistent with results from the employee survey. When asked if they see themselves in their current job six months from now, approximately 25% of respondents answered “maybe” or “no”.

Figure 26. Employee views on whether they see themselves working in their current job six months from now



These turnover rates appear to be high by Canadian standards but align with the turnover rates generally found in the retail industry. For example, according to the Conference Board of Canada, the

2012-2013 voluntary turnover rate in Canada was 7.3% with the involuntary rate landing at 3.7%. The highest turnover rate, 20.6%, was experienced by the retail industry.⁶⁰

It is important to note that turnover rates in the industry are due in part to the fact that some staff are students/seasonal workers. For example, of those employees who said they do not see themselves in their current job in six months or are unsure (n = 101), approximately 28% report that this is because they are student/seasonal workers and will move on. However, there are a range of other factors that could account for high turnover. These are discussed below.

Finding: Wages are the most important consideration when retaining and attracting employees. This presents certain challenges because of the industry's low profit margins and high labour costs.

While there are a number of factors that contribute to the industry's high turnover rate and its recruitment challenges, wages appear to be the most important consideration when retaining and attracting employees. Many employers report that their main barrier to recruitment is the fact that wages and/or benefits are not competitive, although this is more likely to be reported as a barrier by chains (52%) than independent stores (38%). Most employers (58%) also report that the main reason that employees leave or quit is because wages are not high enough.

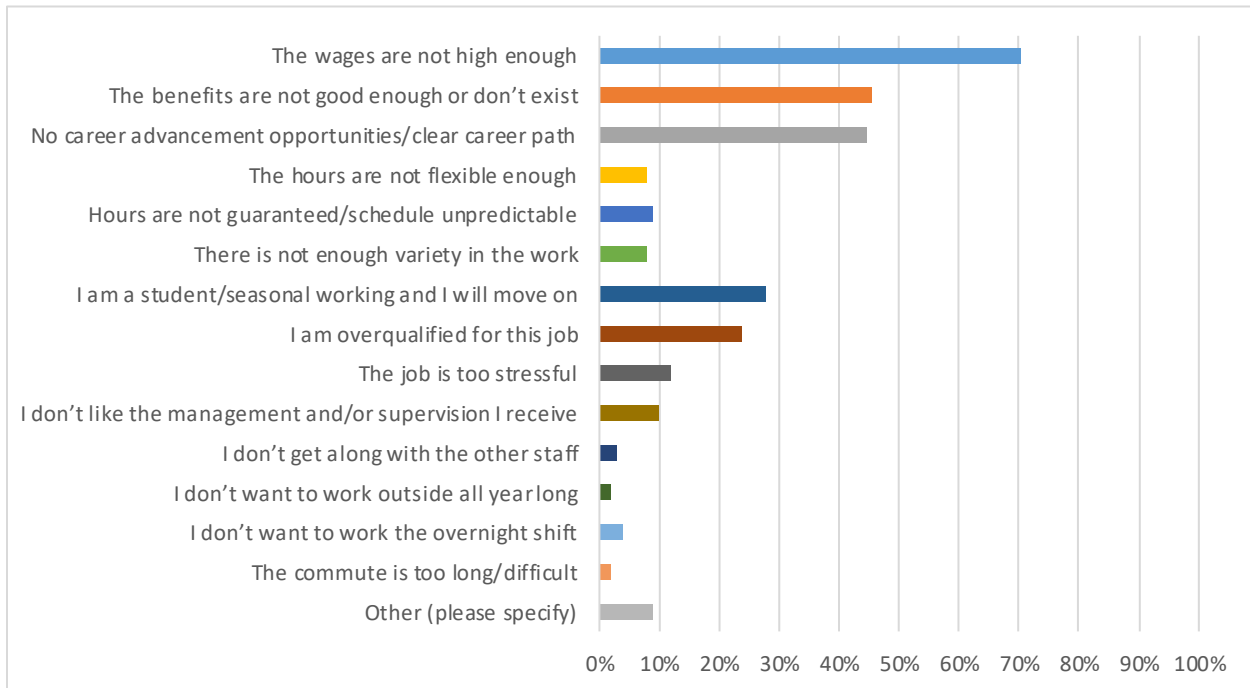
These findings are consistent with employee perspectives. Results from the employee survey indicate that employees consider good wages to be the most important aspect of a job, a finding which is consistent across age groups and regions. When asked how important specific aspects of a job are to them, over 50% of respondents identified "good wages" in the top three of ten options. Approximately 30% identified "good wages" as their top selection. This is a higher percentage of responses than any other option. In short, no matter how "importance" is measured (i.e. in the top three selections or as the top single selection), on aggregate, good wages were identified as the most important aspect of a job for respondents.

In addition, approximately 70% of the employees who responded "no" or "maybe" when asked if they see themselves in their current job six months from now (n = 101), identified low wages as the main reason for leaving their positions.⁶¹

⁶⁰ Conference Board of Canada. HR Q&A. Available online at: <http://www.conferenceboard.ca/topics/orgperform/resources/questions.aspx#Q1>. Accessed on 24 January 2018.

⁶¹ For this question, the margin of error is 8% with a confidence level of 90%. These are lower than the targets for this survey. However, when compared to other similar responses, confidence in the accuracy of this response increases.

Figure 27. Employee-reported reasons for leaving positions six months from now



The ability of employers to raise wages is constrained by low profit margins and the high cost of labour. According to Statistics Canada, the net profit margin for c-stores within Canada (without gas) is about 4% for all stores. Chain stores tend to have higher net profit margins (ranging between 4.6-5.3%) compared to independent stores (ranging between 3.5-3.8%),⁶² and 26% of convenience stores are not profitable.⁶³ Moreover, profit margins have been relatively consistent since 2012.⁶⁴

In addition to offering comparatively low wages without benefits, the employer survey and interviews revealed that some employers are pursuing other initiatives in response to low profit margins.⁶⁵ These are focused mainly on theft prevention through training and automated inventorying, and increasing sales by training staff in sales and product promotion. However, these efforts are not consistently pursued throughout the industry and, given the persistence of low profit margins in the industry, it is unclear if they have been particularly effective.

⁶² Statistics Canada, CANSIM tables 080-0028 and 080-0030, Annual Retail Trade Survey. Data is Canada-wide and targets businesses with revenues between \$30,000 and \$5 million.

(Estimates for 2015 are preliminary. Preliminary data are subject to revision.) (Accessed: 31 January 2018)

⁶³ Canadian Industry Statistics. Available online at: <https://corporationscanada.ic.gc.ca/app/scr/app/cis/search-recherche#brwseinds>. Accessed on 29 January. The net profit margins reported above are for businesses with \$30,000 to \$5 Million annual revenue. This is based on data from Statistics Canada – Small business profiles, 2015.

⁶⁴ Statistics Canada, CANSIM tables 080-0028 and 080-0030, Annual Retail Trade Survey. Data is Canada-wide and targets businesses with revenues between \$30,000 and \$5 million.

⁶⁵ For the purposes of this report, this report addresses only labour-related efforts that employers are making to address low profit margins. A discussion of other initiatives aimed at increasing profit margins, such as product diversification, are out of scope for this report.

Figure 28. C-store net profit margins compared to other sectors⁶⁶

C-stores (no gas)	Net profit margin	Sector	Net profit margin
C-stores overall	4%	Retail Trade	5.3%
C-stores (chains)	4.6-5.3%	Accommodation and Food Services	4.2%
C-stores (independent)	3.5-3.8%	Professional, Scientific and Technical Services/ Real Estate and Regional and Leasing	~ 30%

In addition, labour and commissions account for the industry’s largest share of indirect operating expenses, comprising approximately 42% to 45% of total indirect operating costs. This is over twice the size of the next largest expense category when “other expenses” were dropped, which is rent. As comparisons, labour and commissions account for approximately 40% of indirect costs for Accommodation and Food Services, approximately 49% for Professional, Scientific and Technical Services, and approximately 16% for Estate and Rental and Leasing.⁶⁷

Finding: While wages are important, employees also value other aspects of the job. There is a general alignment between employee priorities and what employers offer their staff, higher wages notwithstanding. However, employers tend to under-estimate the importance of medical and other benefits.

While wages are, overall, the most important consideration for retention and recruitment, employees value other aspects of the job. After “good wages”, employees identified feeling valued, respected and part of a team, good benefits, and an attractive/fun work environment as other core (i.e. top three after wages) priorities in descending order of priority.

These findings are reinforced by employee responses to the reasons they will or might leave their jobs in the next six months (n=101). After wages, insufficient benefits (“benefits are not good enough”) was the second most commonly cited reason for moving on.

Employers have a good understanding of what employees value most in their jobs. They too place higher wages first on the list of priorities but also identify “feeling valued, respected and part of the team” and an “attractive/fun work environment” as core components of the employee value proposition. Survey results suggest that employers are trying to offer these aspects of the job to their employees. However, employers tend to over-emphasize the importance of flexible hours and overtime and under-emphasize the value that employees place on benefits like medical coverage; only 12% of employers offer benefits, including basic MSP coverage, extended medical insurance, dental insurance and/or pension payments or RRSP matching.

⁶⁶ All data from this table are from Canadian Industry Statistics. Available online at: <https://corporationscanada.ic.gc.ca/app/scr/app/cis/search-recherche#brwseinds>. Accessed on 29 January. The net profit margins reported above are for businesses with \$30,000 to \$5 Million annual revenue. This is based on data from Statistics Canada – Small business profiles, 2015.

⁶⁷ Ibid.

Most of the employers (10 out of 12) interviewed for this report noted that they do not provide benefits to staff, principally because costs are too high. However, all of these employers noted that, if costs were not prohibitive, they would choose to offer benefits to employees.

6.

How productive and engaged are employees?

Finding: Employers report relatively low levels of productivity and engagement among staff. In comparison, employees rank their levels of motivation as quite high.

Literature related to employee productivity tends to point to the relationships between job satisfaction, engagement, turnover and profit. For example, a survey of 20,000 c-store employees and managers conducted by the Coca-Cola Retailing Research Council indicated that employee engagement plays a crucial role in reducing turnover and that higher levels of employee engagement are related to both higher profit and lower turnover.⁶⁸ Another research study from 2012 found that employee job satisfaction has a positive impact on productivity.⁶⁹

However, when asked about engagement levels among their staff, approximately 42% of employers considered their staff to be highly engaged and productive, with approximately 58% indicating that their staff is somewhat productive or not very productive.⁷⁰ In comparison, employees rated their level of motivation as 8 on a scale from 0 to 10 where 0 is not at all motivated, 5 is somewhat motivated, and 10 is extremely motivated.

⁶⁸ Coca-Cola Retailing Research Council. 2016. People Power for C-Stores: Using employee engagement to build business results. Available online at: http://www.ccrcc.org/wp-content/uploads/sites/24/2017/07/NACS-2016-September_Updated.pdf Accessed on 24 January 2018.

⁶⁹ Böckerman, Petri and Ilmakunnas, Pekka. 2012. *The Job Satisfaction-Productivity Nexus: A Study Using Matched Survey and Register Data*. Industrial & Labor Relations Review, Vol. 65, No.2, Article 3. Available online at: http://www.petribockerman.fi/bockerman&ilmakunnas_the_2012.pdf Accessed on 3 February 2018.

⁷⁰ Numbers may not add up due to rounding.

Figure 29. Employer perspectives on employee engagement⁷¹

Response	Overall
My employees are highly productive. They show up on time. They are motivated. They are self-starters. They rarely take sick days. I feel like they are performing well.	42%
My employees are somewhat productive. They usually show up on time and are somewhat motivated. They take an average number of sick days. I/their supervisor at times need to tell them what to do. I am somewhat satisfied with their performance.	55%
My employees are not very productive. They are often late and do not seem to be motivated. I/their supervisor constantly needs to tell them what to do. I am generally not satisfied with their performance.	2%

Findings from the employer and employee interviews conducted to date indicate that these discrepancies may be due to a mismatch in expectations. Both pointed to punctuality, “taking the initiative” and completion of all assigned tasks as indicators of motivation. However, employers (7 out of 12) were more likely than employees (4 out of 15) to stress the importance of good customer service, the promotion of products and the volume of sales as indicators of employee engagement.

7.

What skills gaps are present in the workforce and what training is available?

Finding: Most employers report that their staff have some type of skill gap. However, most employees feel that their skills and experience match the job’s requirements. In addition, while the skills required by c-store employees are diverse, the training offered by employers is comparatively narrow. Moreover, while employers cited skills deficits in younger workers, in general, they do not provide tailored training for younger workers.

Most employers report that their staff have some type of skill gap. The most common skill deficits include multi-tasking, addressing customer conflict, customer service and the ability to work independently. In contrast, 88% of employees strongly agreed or agreed that their skills and experience match the job’s requirements with no significant difference reported between levels of education, age or whether a respondent worked at a chain or independent store. Moreover, 84 of the total respondents to the skills-related section of the employee survey (n=348)⁷² identified a skill or skills that they currently do not have and that could help them perform better at work. The most common skills

⁷¹ The “overall” category includes chain stores, independent stores and stores that were not identified as either chain or independents.

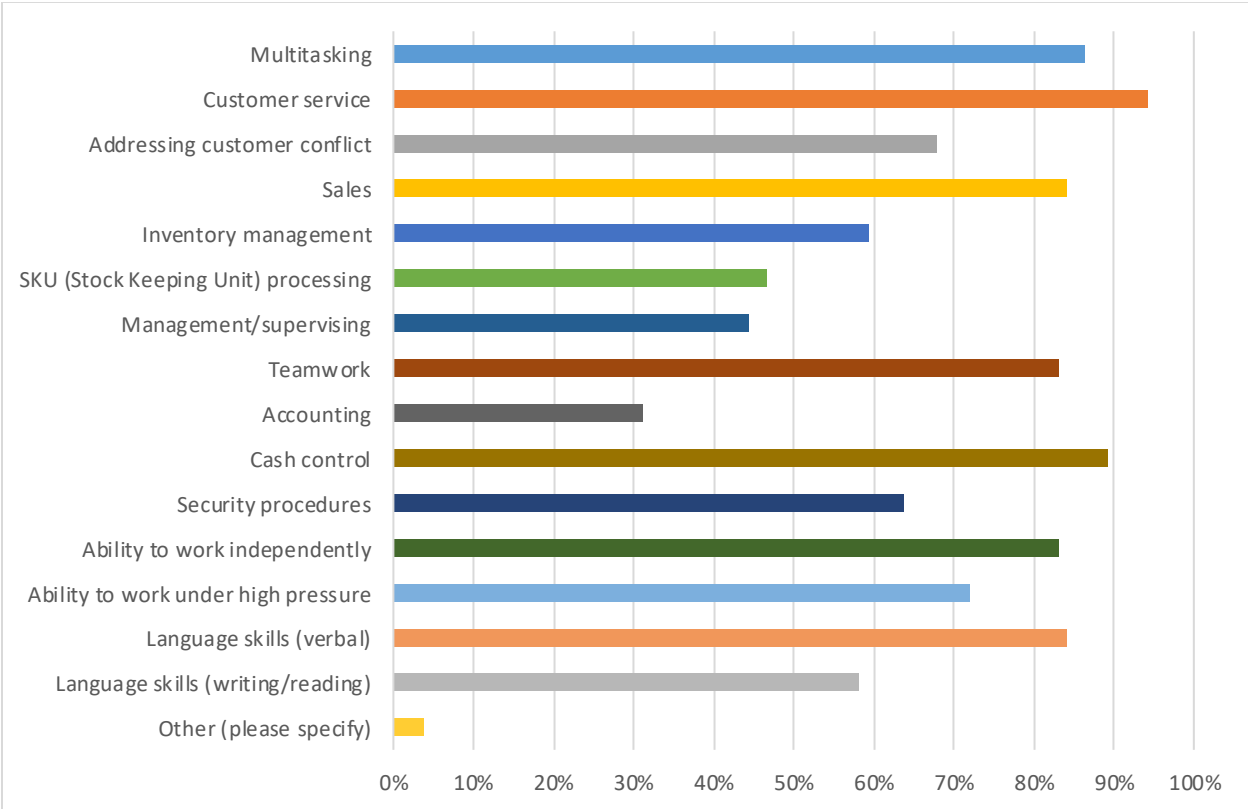
⁷² Note that 348 respondents either skipped this question or responded “no” (or a variation of this) when asked if they could think of any skills that they currently don’t have and that would help them perform better at work.

gaps identified by this group of respondents include management/leadership skills (17 responses), communication skills (11 responses), and accounting skills (7 responses) as the most common gaps.⁷³

These discrepancies in perspective may be explained in part as a disconnect in expectations. The “soft skill” deficits identified by employers are often gained through experience and with age. Interviews indicate that employers tend to have the same expectations of younger workers as they do for older age groups. Yet, none of the employers interviewed for this report provide tailored training to help young people build up the skills they need to perform well in their job.

Furthermore, the skills required by c-store employees appear to be diverse and fit within a continuum of basic skills (e.g. language skills) to high-level management/high responsibility skills (e.g. cash control, addressing customer conflict) and a mix of hard skills (e.g. accounting, inventory management) and soft skills (e.g. teamwork, ability to work under high pressure).

Figure 30. Skills identified by employees as being required for their work



Yet, while most employers report having a training strategy, training is quite narrow and focuses primarily on new employee training and customer services training. Some larger chains offer different training options. However, these are also limited in scope and tend to be related to safety (i.e. food

⁷³ Given the small sample size, these are not statistically significant results. Nevertheless, they do provide some insight into the skills gaps employees have identified and the lack of alignment with the skills deficits identified by employers.

safety, workplace injury prevention, Workplace Hazardous Material Information System (WHMIS), car wash safety, propane certification, and fire safety certification), restricted products (i.e. age verification, contraband tobacco and grey market food products) and sales and service (i.e. preventing theft, merchandising, selling carwash products and customer service).⁷⁴ In addition, there are limited industry-led training options available. The CCSA currently provides training on how to properly manage and sell age-restricted products and how to identify contraband tobacco. At one stage, it offered several courses that covered topics such as harassment and sales as well as WHMIS training. However, these courses are no longer available. The WCSA is developing an online portal that includes a learning management system but currently lacks the resources to develop new courses.

In short, there appears to be a gap in the industry in relation to training requirements and the availability of training. While employees require a range of basic to high-level skills that combine hard and soft skill sets, most employers offer only narrowly focused training. Some larger employers provide a number of different training options but these tend to be focused on developing a narrow set of skills (i.e. new employer training, customer service, safety, restricted products, and sales). In addition, industry-wide training is limited.

8.

What are the perceptions of the industry and how, if at all, do these perceptions impact attraction and retention?

Finding: Both employers and employees think the general public views a job in the c-store industry as a “survival job” or as a good job for students or foreign workers/new immigrants. Approximately 16% of employers feel that these perceptions have a negative impact on their ability to attract and retain staff.

When asked their opinion on what the general public thinks about a job in the c-store industry, both employers and employees identified “it’s a survival job”, and “it’s a good job for students and/or foreign workers/new immigrants” as the most commonly held views.

This aligns with secondary literature on public perceptions of employment in the broader retail industry, which is frequently described as hard, low wage work. For example, one 2004 study noted that the retail industry has often been regarded as a “Cinderella” industry characterized by “hard work, low wages, with little training and qualifications on offer, and few career opportunities.”⁷⁵ The same study found that a job in the retail industry was not appealing to parents or teachers as it was generally viewed as a low skills industry. More recently, the National Retail Federation, a US-based retail trade

⁷⁴ This information is based on an exchange with a representative of a larger c-store chain.

⁷⁵ Huddleston, H and Hirst, C. 2004. *Are you being served? Skills gaps and training needs within the retail sector*. Research Paper 53, The University of Warwick. Available at: <http://www.skope.ox.ac.uk/wp-content/uploads/2014/04/SKOPEWP53.pdf>. Accessed on 25 January 2018.

association, noted that the broader public has increasingly negative perceptions about employment in the retail industry.⁷⁶

Some employers feel that these perceptions have an impact on their ability to attract workers. Close to 16% of employers report that one of their greatest barriers to recruitment is that the “industry brand” is not appealing. This aligns with the findings in the literature that underscore the impact that “branding” can have on an industry’s capacity to attract and retain employees.⁷⁷ In this regard, 20% of employers reported that they would find it useful to have support to improve the industry’s branding and image.

It is important to note that these negative perceptions of work in the industry do not altogether reflect employee experiences. The “low wages” dimension of the work notwithstanding, the employee survey suggests that the volume of work, pressures related to meeting both work and family/personal responsibilities, physical comfort, stress levels and safety are not major concerns for employees. These findings are consistent across age groups, regions, and sex of respondent. Interviews conducted with employees also pointed to a number of attractive features of employment in the c-store industry, stressing in particular opportunities for social interaction with customers and other team members.

Figure 31. Employee perspectives on volume of work, physical comfort, stress levels and safety

Responses	Strongly agree or agree	Neither agree nor disagree	Disagree or strongly disagree
The amount of work I am asked to do is reasonable.	86%	9%	4%
I am able to satisfy both my job and family/personal responsibilities.	75%	16%	8%
My workplace is a physically comfortable place to work.	83%	12%	5%
I feel safe at work.	80%	15%	5%
I typically feel tense or stressed out during the workday.	23%	33%	45%

⁷⁶ See, for example, Halzack, Sarah. October 2014. *Retail jobs are often perceived as lousy jobs. The industry is fighting to change that.* The Washington Post. Available online at: https://www.washingtonpost.com/news/business/wp/2014/10/14/retail-jobs-are-often-perceived-as-lousy-jobs-the-industry-is-fighting-to-change-that/?utm_term=.0749fc6a0177. Accessed on 31 January 2018.

⁷⁷ Gunn, Frances and Anna Cappuccitti. April 2016. *Canadian Perceptions of Retail Management as a Career.* Ryerson University and Seneca. Available online at: https://www.ryerson.ca/content/dam/tedrogersschool/rm/documents/research/RetailAsCareer_WhitePaperApr2016.pdf. Accessed on: 31 January 2018.

V. Recommendations

Based on these findings, this report presents a number of recommendations moving forward. These include the following:

- **Develop youth engagement and retention strategies that maximize opportunities for young workers to enter and advance in the c-store industry.**

C-store employers rely heavily on younger workers, a shrinking demographic in B.C. This means that competition with other industries to attract and retain these workers will likely intensify. However, employers tend not to have coherent strategies to attract and retain youth. In addition, c-store employers report that they have the same expectations of younger people as they do of older workers but have not tailored training strategies to address skill gaps related to age. There may be opportunities for the industry to provide advice and support to c-store employers to develop strategies to engage and retain youth in the industry, including NEET youth. Strategies could include building mentorship programs, promoting career opportunities and pathways in the industry, and tailoring or developing training programs for younger workers, including NEET youth.

- **Enhance outreach to and increase recruitment of populations that are under-represented in the industry compared to relevant benchmarks, particularly retirees (people 55 years of age and older) and women, or populations that are concentrated among certain employers, particularly Indigenous people (First Nation, Métis or Inuit).**

The analysis conducted for this report revealed that there is a lower proportion of people aged 55 and older in the c-store industry compared to relevant benchmarks. A small number of employers (2 out of 12) noted that the physical nature of the job may prevent people in this age demographic from performing some tasks, specifically pumping gas or standing for a full 8-hour shift. Almost all those interviewed (11 out of 12) indicated that there are opportunities to increase the number of people 55 years of age or older in the c-store workforce. During the employee interviews, none of the 5 employees interviewed for this report who are 55 years of age or older reported facing any age-specific barriers or challenges related to their jobs.

The analysis also indicated that there is a lower proportion of women in the c-store industry compared to relevant benchmarks. A number of employers (4 out of 12) noted that concerns over safety meant that they tried to avoid putting female employees on evening shifts on their own. All those interviewed (12 out of 12) indicated that there are opportunities to increase the number of women in the c-store workforce. In the employee interviews, none of the 9 women interviewed reported facing any barriers or challenges in the c-store industry specifically because they are women.

There is a higher percentage of Indigenous people in the industry compared to the B.C. labour force and the overall national labour force. A number of employers who have Indigenous workers on staff rely heavily on this population to meet their staffing needs. However, the majority of stores do not have Indigenous people on staff. During interviews, employers indicated that they saw no barriers to participation of Indigenous people in the c-store industry. However, those employers who do not have Indigenous people on staff (5 out of 12) indicated that this was because they were not exposed to potential candidates/applicants from this population.

Most employers do not have targeted strategies to recruit from specific populations. Those that do, tend to target college/university students and high school students. Interviews indicate that employers generally do not target specific groups while recruiting because they are focused on reaching out to as many people as possible, and targeting certain populations might limit options. This is particularly true for stores based in smaller communities. However, employers in the industry tend to draw on employee referrals and “word of mouth” as their primary recruitment tools. This means that employers may remain confined to a small labour pool.

While each demographic may require a different outreach/recruitment strategy, there may be opportunities to help employers expand their recruitment efforts and to increase the participation of people aged 55 and older, women and Indigenous people in the overall c-store workforce.

- **Provide industry-wide recruitment support that responds to the diverse needs of different store types and location.**

Most c-store employers report experiencing recruitment challenges. More than half of all chain and close to a quarter of all independent stores indicate that they would find recruitment support useful. In addition to support for broadening recruitment outreach, employers identify assistance with developing job profiles and conducting effective interviews as priority support areas. There may therefore be opportunities to provide industry-wide recruitment support with a view to responding to the diverse needs of different store types and locations.

- **Explore options to make the Temporary Foreign Worker Program more accessible to employers.**

Results from the employer survey suggest that the Temporary Foreign Worker Program is not broadly used by employers, but that it provides a significant source of labour for a number of stores that do use it. However, recent changes to the program have made it less accessible or attractive to employers. There may therefore be an opportunity to explore options on how stakeholders can advocate for changes that make this program a more viable option for addressing labour shortages in the industry.

- **Improve the employee value proposition, particularly by enhancing employee benefits.**

While wages are the most important consideration in attracting and retaining employees, employees value other aspects of the job, including feeling valued, respected and part of a team, good benefits, and an attractive/fun work environment. There is a general alignment between these priorities and what employers offer their staff. However, employers tend to underestimate the importance of medical and other benefits, with about one in ten employers offering benefits, including basic MSP coverage, extended medical insurance, dental insurance and/or pension payments or RRSP matching.

There may be an opportunity for the industry to enhance the non-wage related aspects of the employee value proposition, including encouraging management styles and strategies that make employees feel valued and part of a team as well as investing in building and maintaining an attractive work environment.

Ultimately, however, providing benefit packages to employees may provide the highest value investment in attraction and retention. Interviews with employers suggest that those who do not currently offer benefits would do so if costs were not prohibitive. There may therefore be an

opportunity for the industry to collectively engage a benefits service provider, thereby reducing the costs to individual employers.

- **Identify employee engagement drivers and develop strategies to enhance engagement and productivity.**

Much of the secondary literature on the question of employee productivity points to the relationships between job satisfaction, engagement, lower turnover, higher profits and overall productivity. Yet, employers report relatively low levels of productivity and engagement among staff. In comparison, employees rated their level of motivation as fairly high (8 out of 10). These divergences could point to different expectations on the part of employers and employees, particularly around customer service, product promotion and volume of sales.

There may be opportunities for stakeholders to identify common engagement drivers and to develop strategies to enhance productivity.

- **Develop training strategies that respond to the broad set of skills required by c-store employees.**

The skills required by c-store employees are diverse and span a continuum of basic skills (e.g. language skills) to higher-level management/high responsibility skills (e.g. cash control, addressing customer conflict), and a mix of hard skills (e.g. accounting, inventory management) and soft skills (e.g. teamwork, ability to work under pressure.). Most employers report having a training strategy, but these tend to be narrowly focused on new employee training, safety, restricted products, and sales and service.

More than half of all chains, and 40% of independent stores indicate that they would find it useful to receive training support. However, industry-led training options, either through the CCSA or the WCSA, are limited.

In short, there appears to be gap in the industry in relation to training requirements and the availability of training. In light of these findings, there may be opportunities to provide broader, industry-wide training support.

- **Re-brand employment in the industry to increase its appeal to potential employees.**

Both employers and employees think the general public views a job in the c-store industry as a “survival job” or as a “good job for students or foreign workers/new immigrants.” This aligns with secondary literature on public perceptions of employment in the broader retail industry, which is frequently characterized by hard, low wage work with few career opportunities. In addition, research finds that “branding” may also have an impact on the industry’s capacity to attract and retain employees.

It is difficult to redress this perception, particularly because low wages and the absence of benefits are, at present, a fact of life in the industry. Yet, the employee survey and interviews revealed that there are many aspects of the job that are valued by current employees and that could be “advertised” to prospective job seekers, including the multi-skilled nature of the work, career advancement opportunities, the flexibility to balance work with personal responsibilities, and the opportunities for social interaction.

In addition, there are a number of useful examples of how traditionally unpopular employers have re-branded themselves to be more appealing to potential employees. McDonald's Canada's "Build a Successful Career with Us" campaign, for example, targets younger workers and uses a story-telling technique to directly address its image as a job of last resort. The campaign aims to promote McDonald's Canada as a flexible and accommodating employer that provides opportunities for skills development and career advancement.

The development of a branding strategy that challenges current perceptions of work in the c-store industry, sells the attractive features of c-store employment, and appeals to a broader group of potential workers may contribute to addressing the recruitment and retention issues that are common in the industry.

- **Increase awareness/knowledge within the industry around the potential benefits of automation and explore options for support with initial uptake and on-going upskilling.**

According to survey results, approximately half of all employers report that their store has not yet adopted labour-saving automation. In addition, approximately a third note that they are unlikely to do so in the next 3 to 5 years. Interviews revealed that adoption rates may be low due to a lack of knowledge about automation and its potential benefits. A number of employers pointed to an interest in learning more about automation and how it might help increase efficiency and reduce pressure on staff. A review of relevant best practice suggests that key factors impacting the pace of adoption of automation relate to the extent to which the economic benefits from automation are understood within an industry and the extent to which support is provided for initial uptake and on-going upskilling. In this regard, there may be an opportunity to broaden industry-wide awareness/knowledge related to different automation options, including their economic and other benefits and to explore options for establishing a forum where stakeholders (such as suppliers/vendors) could share information and provide support around the initial uptake of automation and on-going upskilling.

Annex 1. Employer Survey Questions

A. Store profile

1. In which area is your store located? For owners/managers of multiple store locations, please account for all store locations. (map provided)
 - a. Cariboo
 - b. Kootenay
 - c. Mainland / Southwest (including Vancouver)
 - d. North Coast and Nechako
 - e. Northeast
 - f. Thompson Okanagan
 - g. Vancouver Island / Coast

2. What type of area is your store located in? For owners/managers of multiple store locations, please account for all store locations.
 - a. A major urban center
 - b. An urban area
 - c. A rural area

3. What best describes your store?
 - a. Independent store
 - b. Franchise store
 - c. Regional Chain
 - d. National Chain
 - e. Other. Please specify: _____

4. How many **full-time** staff do you employ? For owners/managers of multiple store locations, please indicate the total number of full-time staff at all store locations.

(Range of 0 to 500 provided)

5. How many **part-time** staff do you employ? For owners/managers of multiple store locations, please indicate the total number of part-time staff at all store locations.

(Range of 0 to 500 provided)

6. Which of these items does your store sell? (select all that apply)
 - a. Convenience items such as food, beverages, newspapers and magazines
 - b. Gas
 - c. Tobacco
 - d. Alcohol
 - e. Lottery tickets

7. How many stores do you represent?

-
8. How do you anticipate your annual sales will change over the next 12 months?
 - a. They will increase
 - b. They will decrease
 - c. They will remain the same
 - d. I am not sure

 9. How do you anticipate your employment (the total number of positions in your store) will change over the next 12 months?
 - a. Total number of positions will increase
 - b. Total number of positions will decrease
 - c. There will be no change
 - d. I'm not sure

B. Workforce demographics

10. How many of your workforce are managerial staff? For owners/managers of multiple store locations, please indicate the number of managerial staff at all store locations.

(Range from 0 to 500 provided)

11. What is the sex distribution of your workforce?

Male _____%
Female _____%
Other _____%

12. We are interested in the age distribution of your workforce. Please describe the distribution in percentage (%.) For owners/managers of multiple store locations, please account for all store locations.

16-24-year-olds __%
25-34-year-olds __%
35-54-year-olds __%
55 + __%

13. What percentage of your workforce self identifies as indigenous (First Nation, Métis, or Inuit)?

_____%

14. What percentage of your workforce are Temporary Foreign Workers?

_____%

C. Labour market dynamics

15. What kinds of staffing challenges do you experience? (select all that apply)
 - a. I have trouble recruiting staff

- b. When I recruit staff, they end up not having the right skills, experience and/or education
- c. When I recruit staff, they end up not being engaged or productive
- d. When I recruit staff, they soon leave for other opportunities
- e. It is difficult to find staff to work night shifts and/or weekends
- f. I have trouble finding people who want to work outside
- g. I am not currently experiencing staffing challenges
- h. Other. Please specify: _____

16. What impact are these challenges having on your business? (select all that apply)

- a. The quality of our customer service is declining
- b. We are not able to expand
- c. Store owners need to work longer hours
- d. We have to rely on current employees for overtime work
- e. The cost of business has increased due to wage increases/increased benefits
- f. We have to reduce operating hours/services
- g. We need to spend a lot of time on training staff
- h. We need to spend a lot of time on recruiting staff
- i. We need to spend a lot of time supervising staff
- j. None of these
- k. Other. Please specify: _____

D. Recruitment

17. What tools do you use when recruiting new employees? (select all that apply)

- a. Word of mouth
- b. Employee referral
- c. Company's website
- d. Putting a "help wanted" sign in the store window
- e. Putting a "help wanted" sign anywhere other than your store (e.g. community center)
- f. Print media ads (e.g. newspapers)
- g. Online job boards (e.g. Craigslist, Kijiji, Indeed.com, Castanet, and/or other employment-related search engines)
- h. Postings on WorkBC job boards
- i. Staffing or recruiting firms/temp agencies
- j. Social media
- k. Job fairs
- l. Actively pursuing foreign hires
- m. I hire family members and/or friends
- n. Other, please specify _____

18. Which of your recruitment tools have you found to be most effective?

- a. Word of mouth
- b. Employee referral
- c. Company's website
- d. Putting a "help wanted" sign in the store window

- e. Putting a “help wanted” sign anywhere other than your store (e.g. community center)
- f. Print media ads (e.g. newspapers)
- g. Online job boards (e.g. Craigslist, Kijiji, Indeed.com, Castanet, and/or other employment-related search engines)
- h. Postings on WorkBC job boards
- i. Staffing or recruiting firms/temp agencies
- j. Social media
- k. Job fairs
- l. Actively pursuing foreign hires
- m. Hiring family and friends
- n. Other, please specify _____

19. Do you have any recruitment practices that specifically target any of the following groups? Select all that apply

- a. High school students
- b. College/university students
- c. Retirees
- d. Foreign workers
- e. Indigenous (First Nation, Métis, or Inuit) people
- f. People with disabilities
- g. I don't target specific groups when recruiting
- h. Other. Please specify: _____

20. When you decide to hire a new employee, how quickly do you make an offer?

- a. On the spot/immediately
- b. Within 24 hours
- c. Between 1 day and a week
- d. More than a week
- e. It depends

21. What are your main barriers to recruitment? (select all that apply)

- a. There are not enough qualified candidates with the right skills and experience.
- b. I don't have enough time to spend on recruitment.
- c. I'm not sure what the best approach to recruitment is.
- d. Wages and/or benefits are not competitive.
- e. There is no clear career path for people.
- f. The “industry brand” is not appealing.
- g. There is a lack of awareness of the industry.
- h. None. I don't experience barriers to recruitment.
- i. Other. Please specify: _____

22. If you have ever hired staff using the Temporary Foreign Worker Program, have the changes in 2014 (i.e. higher costs and the requirement for more detailed information) had an impact on your use of the program?

- a. I have never used the Temporary Foreign Worker Program to hire staff.

- b. I have used the Temporary Foreign Worker Program to hire staff and recent changes have had no impact on how I use the program.
- c. I have used the Temporary Foreign Worker Program to hire staff but because of recent changes, I use it less than I used to.
- d. I have used the Temporary Foreign Worker Program to recruit staff but because of recent changes, I don't use it anymore.
- e. Other. Please specify: _____

23. What positions do you have in your store? (select all that apply)

- a. Store Manager
- b. Supervisor
- c. Customer Service Representative/Cashier
- d. Gas Station Attendant
- e. Food counter attendant/kitchen helper
- f. Security
- g. Other. Please specify: _____

24. Which of these positions do you find hardest to fill when there is a vacancy? Pick the top three.

- a. Store Manager
- b. Supervisor
- c. Customer Service Representative/Cashier
- d. Gas Station Attendant
- e. Food counter attendant/kitchen helper
- f. Security
- g. None, I do not have trouble filling positions
- h. Other. Please specify: _____

25. Is it challenging to find staff to work overnight shifts?

- a. Yes
- b. No
- c. Does not apply (for example, store is not open overnight)
- d. Other. Please specify: _____

E. Retention

26. What percentage of your workforce leaves over the course of a typical year?
(Range from 0% to 100% provided)

27. How would you describe turnover today compared to previous years?

- a. Significantly higher
- b. Higher but not by much
- c. The same
- d. Not as high

28. In your opinion, why do employees leave/quit? (select all that apply)

- a. I often need to fire people
- b. Wages are not high enough
- c. Benefits are insufficient
- d. Lack of career advancement opportunities
- e. Hours are not flexible enough
- f. Hours are not guaranteed
- g. Lack of variety in the work
- h. People move around a lot these days
- i. Some of my staff are students/seasonal workers
- j. Some of staff are over-qualified so they leave as soon as a new opportunity comes up
- k. The job is too stressful
- l. Safety concerns, particularly when working alone
- m. They don't like the supervision we provide
- n. They don't get along with the other staff
- o. Some people do not want to work outside
- p. Some people do not want to work the overnight shift
- q. Other. Please specify: _____

29. What actions are you taking to reduce turnover and to attract new staff? Select all that apply.

- a. We offer higher wages than other retailers
- b. We offer basic medical (MSP) coverage
- c. We offer extended medical insurance
- d. We offer dental insurance
- e. We provide pension payments or RRSP matching
- f. We provide flexible hours and/or overtime
- g. We offer training and/or other career advancement opportunities
- h. We offer bonuses
- i. We offer extra paid vacation (more than the minimum annual requirement)
- j. We offer special rates on store items for employees
- k. We provide a fun/attractive work environment
- l. We make people feel valued and respected
- m. None of these
- n. Other. Please specify: _____

F. Wages and benefits/incentives

30. How much do you pay per hour for full-time positions? (Provide information for all that apply)

- a. Store Manager \$___/hr
- b. Supervisor \$___/hr
- c. Cashier \$___/hr
- d. Gas Station Attendant \$___/hr
- e. Food counter attendant \$___/hr
- f. Security \$___/hr

31. How are wages set?

- a. At the individual store level
 - b. At the corporate level
 - c. A hybrid of individual and corporate level
 - d. I don't know
32. Which statement best describes how you make wage-related decisions? Select all that apply.
- a. We offer minimum wage and only provide raises when the minimum wage increases.
 - b. We have provided raises in the past but are experiencing a wage freeze at the moment.
 - c. We have a pay for performance program and give raises based on productivity/performance.
 - d. We give raises at regular intervals based on length of time in a position.
 - e. We provide across-the-board raises when can afford to but there is no set policy
 - f. We give annual wage increases based on the Consumer Price Index/inflation
 - g. Other. Please describe : _____
33. In your opinion, what do you think your employees value most in their job? (Remember, you are answering from the perspective of your employees. Please drop and drag to rank in order from most to least important.)
- a. Wages
 - b. Benefits (like basic medical (MSP) coverage)
 - c. Flexible hours and/or overtime
 - d. Easy/fast commute
 - e. Training and other career advancement opportunities
 - f. Bonuses
 - g. Extra paid vacation
 - h. Special employee rates for store items
 - i. Clear expectations
 - j. An attractive/fun work environment
 - k. Feeling valued, respected and part of a team
 - l. Employer shows concern for well-being

G. Employee engagement/productivity

34. Generally speaking, how engaged and productive do you think most of your employees are?
- a. My employees are highly productive. They show up on time. They are motivated. They are self-starters. They rarely take sick days. I feel like they are performing well.
 - b. My employees are somewhat productive. They usually show up on time and are somewhat motivated. They take an average number of sick days. I/their supervisor at times need to tell them what to do. I am somewhat satisfied with their performance.
 - c. My employees are not very productive. They are often late and do not seem to be motivated. I/their supervisor constantly needs to tell them what to do. I am generally not satisfied with their performance.
35. Do you find one age group tends to be more engaged and productive than the other? Select the most accurate response.

- a. 16-24-year-olds tend to be the most engaged and productive.
- b. 25-34-year-olds tend to be the most engaged and productive.
- c. 35-54-year-olds tend to be the most engaged and productive.
- d. 55+ year-olds tend to be the most engaged and productive.
- e. I do not notice an age-related difference.

H. Skills, Experience and Training

36. Where do you see skills/experience gaps in your employees? (select all that apply)
- a. my staff don't have any skills/experience gaps
 - b. multitasking
 - c. customer service
 - d. addressing customer conflict
 - e. sales
 - f. inventory management
 - g. SKU (Stock Keeping Unit) processing
 - h. management/supervising
 - i. teamwork
 - j. accounting
 - k. cash control
 - l. security procedures
 - m. ability to work independently
 - n. ability to work under high pressure
 - o. language skills (verbal)
 - p. language skills (writing/reading)
 - q. Other. Please specify: _____
37. What strategies are you using to fill these skills/training gaps? (select all that apply)
- a. New employee training
 - b. Customer services training
 - c. Team building training
 - d. Business management training
 - e. Mentoring
 - f. Performance-related feedback
 - g. We don't have a strategy
38. (If answered (g) to the above) Why don't you have a training strategy? (select all that apply)
- a. A training strategy is not necessary
 - b. Turnover is too high to make training worthwhile
 - c. A training strategy is too expensive
 - d. Designing and implementing a training strategy is too time-consuming
 - e. Other. Please specify: _____

I. Perceptions of the Industry

39. In your opinion, what does the general public think about a job in the convenience store sector?

(select all that apply)

- a. It's a good job with opportunity for growth
- b. It's a job that suits some people's needs/interests
- c. It's a "survival" job
- d. It's a good job for students
- e. It's a good job for foreign workers/new immigrants
- f. It's a good job for people who didn't finish high school
- g. It's an unsafe job
- h. I don't know how the general public perceives jobs in the convenience store sector
- i. Other. Please specify: _____

J. Future of the Industry

40. What type of automation has your store already adopted or will your store likely adopt in the next 3 to 5 years? (select all that apply)

- a. Self-checkout
- b. Online delivery
- c. Automated inventorying
- d. Mobile order & pay
- e. Fully automated store
- f. My store has not yet adopted any automation
- g. My store is not likely going to adopt any new types of automation in the next 3 to 5 years
- h. Other. Please specify: _____

41. If you own/operate/manage a gas station required by law to provide full service options, has this requirement had an impact on your business? Select all that apply.

- a. This question does not apply to me
- b. No impact
- c. It makes it hard to recruit enough staff
- d. It leads to higher operating costs
- e. It draws in more business
- f. It makes the gas station safer
- g. It helps us serve customers who cannot get gas themselves
- h. It helps reduce unemployment
- i. I don't know
- j. Other. Please specify: _____

42. Would you find it useful to receive support for addressing labour market challenges?

- a. Yes
- b. No
- c. I don't know

43. If yes, what kind of support would you find useful?

- a. Recruitment
- b. Training for employees
- c. Industry branding/image
- d. I don't know
- e. Other. Please specify: _____

Thank you very much for taking part in this survey. Your responses will be used to inform a strategy for addressing labour market challenges in the industry.

Annex 2. Representativeness of Employer and Employee Surveys

The following tables illustrate how results from the employer and employee surveys compare to industry reports, comparable NAICS, and the overall provincial and national economies.

Note: Blue highlights represent categories which were considered most relevant for testing the representativeness of survey responses. Other comparisons have been included for information only. Where results vary materially from benchmarks or the other survey (i.e. employer or employee), a note was made.

Comparisons for survey results

Variable	Employee Survey	Employer Survey	CCSA Reports	Relevant NAICS B.C.	All NAICS B.C.	Relevant NAICS Canada	All NAICS Canada
Regional Distribution	✓	✓		✓	✓		
Metro, Urban, Rural	✓	✓	✓				
Independent vs. Chain	✓	✓	✓				
Part-time vs. Full-time	✓	✓	✓	✓	✓	✓	✓
Sex	✓	✓		✓	✓	✓	✓
Age	✓	✓		✓	✓	✓	✓

Store distribution by region

	Employee Survey	Employer Survey	B.C.	B.C.
Store Distribution by Region [Economic Region]	-	-	Wholesale and retail trade (41 44-45)⁷⁸	All Employment⁷⁹
Vancouver Island and Coast, [5910]	8%	12%	15%	16%
Lower Mainland-Southwest [5920]	62%	57%	66%	64%
Thompson-Okanagan [5930]	18%	18%	10%	11%
Kootenay [5940]	7%	2%	3%	3%
Cariboo [5950]	1%	5%	3%	3%
North Coast and Nechako [5960 5970]	0%	3%	2%	2%
Northeast [5980]	3%	2%	1%	2%

Notes: Employer survey results are weighted by store count. Employers who operated in more than one region were dropped.

Metro, Urban, Rural Representation

	Employee Survey	Employer Survey	2017 CCSA report ⁸⁰	2017 CCSA report
Store distribution	-	-	B.C.	Canada
A major urban center	25%	33%	34%	40%
An urban area	52%	47%	29%	26%
A rural area	23%	20%	36%	34%

Notes: Terminology used in CCSA reports use the terms “metropolitan”, “urban” and “rural”, which correspond to the terms used in the surveys, specifically major urban centre, urban area, and rural area. Employer survey results are weighted by store count. Employers who operated in more than one region were dropped. **Stores located in rural areas were under-represented in both surveys.**

⁷⁸ Statistics Canada. Table 282-0125 - Labour Force Survey estimates (LFS), employment by economic region based on 2011 Census boundaries and North American Industry Classification System (NAICS), annual (persons) (accessed: January 28, 2018)

⁷⁹ Ibid.

⁸⁰ Canadian Convenience Store Association. Canada’s Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017.

Independent vs. Chain Stores

	Employee Survey	Employer Survey (weighted by store count)	2017 CCSA report ⁸¹	2017 CCSA report
Type of store	-	-	B.C.	Canada
Corporate/Chain	91%	77%	44%	35%
Independent	9%	23%	56%	65%

Notes: For the employee survey, franchise store, national chain, and regional chain were all counted as corporate/chain stores. Response indicating “not sure” when asked if a chain or independent store were discarded. **Independent stores were under-represented in both surveys.**

Part-time vs. Full-time

	Surveys		2017 CCSA report ⁸²	2016 Census ⁸³			
	Employee Survey	Employer Survey (re: employee split)		B.C.	B.C.	CAN	CAN
	-	-	-	Retail trade [44-45]	All NAICS	Retail trade [44-45]	All NAICS
Part time	32%	47%	48%	37%	26%	39%	23%
Full time	68%	53%	52%	63%	74%	61%	77%

Notes: Employer survey results weighted by total employment. **Part-time employees were under-represented in the employee survey.**

⁸¹ Canadian Convenience Store Association. Canada’s Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017.

⁸² Canadian Convenience Store Association. Canada’s Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017.

⁸³ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016300

Sex of employees

	Surveys		2016 Census ⁸⁴					
	Employee Survey	Employer Survey (re: sex distribution of employees)	B.C.	B.C.	B.C.	CAN	CAN	CAN
Sex	-	-	4471 Gasoline Stations	4451 Grocery Stores	All NAICS	4471 Gasoline Stations	4451 Grocery Stores	All NAICS
Male	59%	59%	55%	44%	52%	57%	46%	52%
Female	41%	41%	45%	56%	48%	43%	54%	48%

Notes: Employer survey results weighted by total employment. Data for the Gasoline Stations was used as a benchmark here. This is because convenience stores are more aligned to Gasoline Stations than they are to Grocery Stores (NAICS4451) in terms of type of work and size of the industry.

Age of employees

	Surveys		2016 Census ⁸⁵					
	Employee Survey	Employer Survey	B.C.	B.C.	B.C.	CAN	CAN	CAN
Age	-	-	4471 Gasoline Stations	4451 Grocery Stores	All NAICS	4471 Gasoline Stations	4451 Grocery Stores	All NAICS
15 to 24 years	31%	35%	30%	30%	13%	35%	36%	14%
25 to 34 years	32%	33%	21%	16%	21%	18%	15%	21%
35 to 54 years	29%	23%	34%	36%	43%	31%	31%	44%
55 years or older	9%	9%	15%	18%	23%	16%	17%	21%

Notes: Employer survey results weighted by total employment.

⁸⁴ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

⁸⁵ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

Annex 3. Semi-Structured Interview Guide for Employers

A. Profile

1. What best describes your store?
 - a. Independent store
 - b. Chain store
2. What is the size of the city or town that your store is located in? If you are the owner or manager of multiple stores, please account for all store locations. Is it:
 - a. metropolitan area (more than 100,000 people)
 - b. urban area (less than 100,000 people)
 - c. rural area (outside metropolitan and urban areas)

B. Recruitment

3. Do you target any particular group when you recruit, including Indigenous people (First Nations, Métis, Inuit), women, people aged 55 years and older, or Temporary Foreign Workers?
4. If yes, why do you target specific populations [*interviewer to insert responses to Q3 here*] while recruiting new staff?
5. If yes, how do you target specific populations when recruiting new staff?
6. If not, why do you not target specific populations when recruiting new staff?
7. Have you ever outsourced your recruiting to a recruiting company?
8. If yes, how would you describe the experience?
9. If not, why not?
10. Would you find it useful to receive recruitment support from an industry association?
11. If so, what kind of support would you find useful?

C. Youth recruitment, retention and skills

12. Do you have experience hiring staff between the ages of 15 and 24? (*Prompt: Have you ever hired staff that are between the ages of 15 and 24?*)

13. If no, why do you think you have never hired anyone from this age group?
14. What skills do you expect this age group to have? (*Prompt: Are these the same skills that you expect from older workers?*)
15. Are these expectations being met?
16. Do you provide any specific training (i.e. tailored to the needs of your younger employees) to young people to help them build up the skills they need to perform well at your store?
17. Do you provide any mentoring or promotion opportunities that are tailored to your younger employees to help build a career in the industry?
18. If yes, do you feel this has had an impact on your ability to attract and retain younger workers?
19. If not, why not?

D. Recruitment and retention of women

20. Do you have experience hiring women? (*Prompt: Have you ever hired staff that are women?*)
21. If yes, what relevant differences between women and men employees do you see with regards to retention and recruitment?
22. If no: Why do you think this is the case?
23. Do you think there are opportunities to increase the number of women in the convenience store workforce?
 - a. Yes, absolutely
 - b. Yes, but women may face certain challenges or barriers in finding and keeping a job in the convenience store industry
 - c. No
 - d. I'm not sure/I don't know
24. If (b) or (c), please explain.

E. Recruitment and retention of people 55 years of age and older

25. Do you have experience hiring people 55 years or age or older? *(Prompt: Have you ever hired staff that are 55 years of age or older?)*
26. If no: Why do you think this is the case?
27. Do you think there are opportunities to increase the number of people 55 years of age or older in the convenience store workforce?
- a. Yes, absolutely
 - b. Yes, but this age group may face certain challenges or barriers in finding and keeping a job in the convenience store industry
 - c. No
 - d. I'm not sure/I don't know
28. If (b) or (c), please explain.

F. Recruitment and retention of people who self-identify as Indigenous

29. Do you have experience hiring people who self-identify as Indigenous (First Nations, Métis, Inuit)? *(Prompt: Have you ever hired staff that self-identify as Indigenous?)*
30. If no: Why do you think this is the case?
31. Do you think there are opportunities to increase the number of people who self-identify as Indigenous in the convenience store workforce?
- a. Yes, absolutely
 - b. Yes, but this group may face certain challenges or barriers in finding and keeping a job in the convenience store industry
 - c. No
 - d. I'm not sure/I don't know
32. If (b) or (c), please explain.

G. Part-time/full-time employment and night shifts

33. How many of your staff work part-time where part-time is less than 30 hours a week?

34. If you could, would you increase the number of staff that you have working full-time compared to part-time?
35. Why/why not? (*Prompts: potential for more engaged staff if they are working full-time; potential changes to benefit requirements if move from part to full-time; other cost considerations; potential to increase/decrease attractiveness of the job to employees*)
36. Is your store open overnight?
37. If yes, do you feel it is necessary for your bottom line/revenues to be open over night?

H. Retention/Turnover

38. How would you describe turnover rates today compared to previous years?
- a) significantly higher
 - b) higher but not by much
 - c) the same
 - d) not as high
39. If rates are significantly higher, higher but not by much, not as high: What do you think are the reasons for this change?
40. If significantly higher, higher but not by much: Are you doing anything to compensate for/reduce the impact of turnover? (*Prompts: more efficient training, more efficient on-boarding, etc.*)
41. Have you found that turnover rates are higher (or lower) for any particular employee population, specifically young people (people between the ages of 15 and 24, people aged 55 years or older, women, people who self-identify as Indigenous or Temporary Foreign Workers)?

I. Adoption of technology/automation

42. Has your store adopted any type of technology or automation in order to help address labour challenges? (*Prompt: examples could include Self-checkout; Online delivery; Automated inventorying; Mobile order & pay*)
43. If no: What are the reasons your store has not yet adopted these or similar types of technology or automation? (*Prompt: we don't see how automation will help with staffing challenges; we don't know enough about automation, prices are prohibitive, training is too complex*)

44. If yes: Have you found that the adoption of automation has helped to relieve any of the staffing challenges you are facing?

45. If yes: Do you intend on continuing to invest in automation?

J. Motivation among employees

46. In general, how would you describe levels of motivation among your staff on a scale from 0 to 10?

- a) 0 is not at all motivated. (They do the bare minimum so they don't get fired.)
- b) 5 is somewhat motivated. (They work pretty well and do a good enough job.)
- c) 10 is extremely motivated. (They work hard and do a good job.)

47. How do you measure or determine if someone is motivated? (*Prompts: punctuality, sick days, work effort during the day, self-starter versus waiting for instruction, etc*)

48. What specific actions do you take as an employer to motivate your staff, if any?

K. Benefits

49. Do you offer any benefits to your employees where benefits refer to, for example, MSP coverage, extended medical insurance, dental insurance and or pensions payments or RRSP matching?

50. If not, why not?

51. If not, would you offer benefits if you could?

Annex 4. Employee Survey Questions

A. Store Profile

1. Where is the store you are working in located? (insert a map)
 - a. Cariboo
 - b. Kootenay
 - c. Mainland / Southwest (including Vancouver)
 - d. North Coast and Nechako
 - e. Northeast
 - f. Thompson Okanagan
 - g. Vancouver Island / Coast
 - h. If unknown, what city or town do you reside in _____
2. Where is the store you are working in located?
 - a. A major urban center
 - b. An urban area
 - c. A rural area
3. What best describes the store you work in?
 - f. Independent store
 - g. Franchise store
 - h. Regional Chain
 - i. National Chain
 - j. Not sure
4. Do you live and work in the same city?
 - a. Yes
 - b. No
 - c. Prefer not to say
5. How long is your commute to work on average?
 - a. Less than 30 minutes
 - b. 30 minutes to 1 hour
 - c. More than 1 hour
6. Do you feel there is adequate affordable housing available close to where you work?
 - a. Yes
 - b. No
7. How many staff work in the store you work in (including you)? Use your “best guess” if you are not sure.

(slide bar ranging from 0 to 50)

8. How old are you?

- a. 16 to 24 years old
 - b. 25 to 34 years old
 - c. 35 to 54 years old
 - d. 55 or older
 - e. Prefer not to say
9. What is your sex?
- a. Female
 - b. Male
 - c. Other
 - d. Prefer not to say
10. What best describes the hours that you work?
- a. Part-time (less than 30 hours a week at this job)
 - b. Full-time (30 hours or more a week at this job)
11. What best describes your position at the store you are working in?
- a. Store Manager
 - b. Supervisor
 - c. Customer Service Representative/Cashier
 - d. Gas Station Attendant
 - e. Food counter attendant/kitchen helper
 - f. Security
 - g. Other. Please specify: _____
12. What is the highest level of education that you have?
- a. Currently in high school
 - b. Completed some high school
 - c. High school graduate
 - d. Completed some college
 - e. Associate's degree
 - f. Bachelor's degree or higher
 - g. Other. Please specify: _____

B. Recruiting

13. How did you find your current job?
- a. Heard about it from a friend
 - b. Another employee referred me
 - c. Through the company's website
 - d. I saw a "help wanted" sign in the store window
 - e. I saw a "help wanted" sign somewhere other than the store window (e.g. community centre)
 - f. Through print media (such as a newspaper) ads
 - g. Through an online job board (e.g. Craigslist, Kijiji, Indeed.com, Castanet, and/or other employment-related search engines)
 - h. Through a posting on WorkBC job boards

- i. Through a staffing or recruiting firm/Temp agency
- j. Through social media
- k. At a job fair
- l. Through the Temporary Foreign Workers Program
- m. My family owns the store
- n. Other. Please specify: _____

C. Retention

14. Do you see yourself working in your current job 6 months from now?
- a. Yes
 - b. No
 - c. Maybe
15. If you answered b or c to the question above, what would be the reasons you would choose to leave your job? (select all that apply)
- a. The wages are not high enough
 - b. The benefits (like health, dental or pension) are not good enough or don't exist
 - c. There are not enough career advancement opportunities or a clear career path
 - d. The hours are not flexible enough
 - e. The hours are not guaranteed or the schedule is too unpredictable
 - f. There is not enough variety in the work
 - g. I am a student/seasonal working and I will move on
 - h. I am overqualified for this job and will leave as soon as a new opportunity comes along
 - i. The job is too stressful
 - j. I don't like the management and/or supervision I receive
 - k. I don't get along with the other staff
 - l. I don't want to work outside all year long
 - m. I don't want to work the overnight shift
 - n. The commute is too long/difficult
 - o. Other. Please specify: _____

D. Wages and Incentives

16. How important are these aspects of a job to you? (Please drop and drag to rank from most important (1) to least important (10).)
- a. Good wages
 - b. Good benefits like medical coverage
 - c. Flexible hours and/or overtime
 - d. Easy/fast commute
 - e. Training and other career advancement opportunities
 - f. Bonuses
 - g. Extra paid vacation (more than the minimum requirement)
 - h. Special employee rates for store items
 - i. An attractive/fun work environment

- j. Feeling valued, respected and part of a team

E. Engagement/Productivity

17. How would you rate your motivation at work? Rank your performance on a scale between 0 and 10 where
- a. 0 is not at all motivated. (I do the bare minimum in my job so I don't get fired.)
 - b. 5 is somewhat motivated. (I work pretty well and do a good enough job.)
 - c. 10 is extremely motivated. (I work hard and do a good job.)

(sliding scale from 0-10)

18. To what extent do you agree with these statements? Please rank using the following scale: 1. Strongly agree; 2. Agree; 3. Neither agree nor disagree; 4. Disagree; 5 Strongly disagree.
- a. My skills and experience match the job's requirements.
 - b. There are opportunities to advance my career goals working for my employer.
 - c. There are opportunities to get promoted/get paid more over time.
 - d. I have enough responsibility/authority in decision-making.
 - e. I know exactly what is expected of me.

F. Health and Safety

19. To what extent do you agree with these statements? Please rank using the following scale: 1. Strongly agree; 2. Agree; 3. Neither agree nor disagree; 4. Disagree; 5 Strongly disagree.
- a. I typically feel tense or stressed out during the workday
 - b. I have the resources to manage work-related stress
 - c. My workplace is a physically comfortable place to work.
 - d. I feel safe at work.
 - e. The amount of work I am asked to do is reasonable.
 - f. I am able to satisfy both my job and family/personal responsibilities.

20. Have you ever experienced verbal abuse from a customer?
- a. No, never
 - b. Yes, but not very often
 - c. Yes, quite often
 - d. Yes, it happens all the time
 - e. I don't want to answer

G. Education, Training and Skills

21. From your experience, what skills are required for the work that you do?
- a. multitasking
 - b. customer service
 - c. addressing customer conflict
 - d. sales

- e. inventory management
- f. SKU (Stock Keeping Unit) processing
- g. management/supervising
- h. teamwork
- i. accounting
- j. cash control
- k. security procedures
- l. ability to work independently
- m. ability to work under high pressure
- n. language skills (verbal)
- o. language skills (writing/reading)
- p. Other. Please specify: _____

22. Can you think of skills that you currently don't have and that could help you perform better at work?

Please specify: _____

23. What kind of training/skills development support do you receive from your employer?

- a. New employee training
- b. Customer services training
- c. Team building training
- d. Business management training
- e. Mentoring
- f. Performance-related feedback
- g. No training/skills development support
- h. Other. Please specify: _____

H. Perceptions of the Industry

24. In your opinion, what does the general public think about a job in the convenience store sector?

Select all that apply.

- a. It's a good job with opportunity for growth
- b. It's a job that suits some people's needs/interests
- c. It's a "survival" job
- d. It's a good job for students
- e. It's a good job for foreign workers/new immigrants
- f. It's a good job for people who didn't finish high school
- g. It's an unsafe job
- h. I don't know how the general public perceives jobs in the convenience store sector
- i. Other. Please specify: _____

25. How likely is it that you would recommend your job to a friend or colleague?
(Scale from 1 to 10 inserted here with 0 = not at all likely and 10 = extremely likely)

Thank you very much for taking part in this survey. Your responses will be used to inform a strategy for addressing labour market challenges in the convenience store industry. Your feedback and comments are extremely important to us and we appreciate your time.

Annex 5. Semi-Structured Interview Guides for Employees

A. Profile

1. What best describes the store you work in?
 - a. Independent store
 - b. Chain store
2. What is the size of the city or town that your store is located in? Is it:
 - d. metropolitan area (more than 100,000 people)
 - e. urban area (less than 100,000 people)
 - f. rural area (outside metropolitan and urban areas)
3. How old are you?
4. What is your sex?

B. Part-time versus full-time

5. What best describes the hours that you work?
 - a. Part-time (less than 30 hours a week at this job)
 - b. Full-time (30 hours or more a week at this job)
6. If part-time: Why are you working part-time?
7. If part-time: If given the choice, would you like to increase your hours to full time hours (more than 30 hours a week)? Please explain.

C. Youth

8. If the respondent is between the ages of 15 and 24:
 - a) Do you feel you have the skills you need to perform well at your job?
 - b) Has your employer provided you with any opportunities for building or developing the skills you need for your current job?
 - c) Does your employer provide opportunities to advance the career needs and goals of young workers like yourself? (*Prompt: mentoring, promotion pathways, work placements*)?
 - d) Do you think there is anything your employer could do to make your job more attractive to people your age?

D. People aged 55 years or older

9. If the respondent is 55 years old or older:
 - a) How did you find your current position?

- b) What attracted you to a job in the convenience store industry?
- c) Do you feel you faced any barriers or challenges to getting your job because of your age? Please explain.
- d) Are there any aspects of the job that might be particularly attractive to people who are 55 years of age or older compared to people in other age groups? (*Prompts: flexible working opportunities, training opportunities to build up skills, adequate compensation/benefits, fun/attractive social environment, sense of purpose, ability to balance professional and personal life, etc*)
- e) Are there any aspects of the job that might be less attractive to people who are 55 years or older compared to people in other age groups? (*Prompts: hours, safety, discrimination/treatment in the workplace, inadequate compensation/benefits, etc*)

E. Women

10. If the respondent is a woman:

- a) How did you find your current position?
- b) What attracted you to a job in the convenience store industry?
- c) Do you feel you faced any barriers or challenges to getting your job specifically because you are a woman? If so, please explain.
- d) Are there any aspects of the job that might be particularly attractive to women as compared to men? (*Prompts: flexible working arrangements, safe working environment, ability to balance professional and personal life, etc*)
- e) Are there any aspects of the job that might be less attractive to women compared to men? (*Prompts: safety concerns, discrimination, different/fewer advancement opportunities as other staff, etc*)

F. Men

11. If the respondent is a man:

- a) How did you find your current position?
- b) What attracted you to a job in the convenience store industry?
- c) Do you feel you faced any barriers or challenges to getting your job specifically because you are a man? If so, please explain.
- d) Are there any aspects of the job that might be particularly attractive to men as compared to women? (*Prompts: flexible working arrangements, safe working environment, ability to balance professional and personal life, etc*)
- e) Are there any aspects of the job that might be less attractive to men compared to women? (*Prompts: safety concerns, discrimination, different/fewer advancement opportunities as other staff, etc*)

G. Productivity/motivation and eNPS

12. How would you describe your levels of motivation at work on a scale from 0 to 10?

- a) 0 is not at all motivated. (I do the bare minimum in my job so I don't get fired.)

- b) 5 is somewhat motivated. (I work pretty well and do a good enough job.)
- c) 10 is extremely motivated. (I work hard and do a good job.)

13. If 7 and above: How do you think you demonstrate that you are motivated? (*Prompts: punctuality, sick days, work effort during the day, self-starter versus waiting for instruction, etc*)
14. If 7 and above: Is there anything in particular that your employer is doing to help you feel motivated?
15. If 6 and below: How do you think your lower levels of motivation are expressed or demonstrated? (*Prompts: punctuality, sick days, work effort during the day, self-starter/wait for instruction, etc*)
16. If 6 and below: Is there anything your employer could do to help you feel more motivated?
17. Does your employer provide you with any of the following?
 - a. opportunities to advance your career goals
 - b. opportunities to get promoted/get paid more over time
 - c. opportunities to take on more responsibility/exercise authority in decision-making
18. If yes, do you think this has had any impact on your levels of motivation and job satisfaction?
19. If no, do you think you would feel more motivated and satisfied with your job if your employer provided these opportunities?

H. Appeal of the industry

20. What aspects of your job do you like the most?
21. What aspects of your job do you like the least?

Annex 6. Detailed Information on Labour Supply-Demand Model

A labour supply-demand model was created using Government data sources,⁸⁶ industry reports from 2014 to 2017⁸⁷ as well as the results from the employer and employee surveys. The purpose of this model is to baseline labour supply and demand and to provide directional quantitative insights into how changes to certain c-store industry practices might impact the supply and demand of labour.

The labour supply-demand model provides insights into the directional impact of several levers (i.e. opportunities for impact) on labour supply and demand. Specifically, the following opportunities were analyzed:⁸⁸

Supply-side baseline and opportunities:

- Ageing population and labour force growth (baseline only)
- Increase the participation of older workers (55+) (opportunity)
- Increase the participation of women (opportunity)

Demand-side baseline and opportunities:

- Industry demand growth (baseline only)
- Improve labour productivity (opportunity)
- Decrease in the part-time rate (opportunity)

Establishing the baseline supply and demand

By integrating various existing data sources with survey data, a model was built to capture the supply and demand baseline, using the following approach:

- Supply and demand were measured by the total headcount (i.e. number) of employees in the industry, including both full-time and part-time employees. Supply and demand were initialized in equilibrium (Supply = Demand) for 2016, using data from industry reports (i.e. 25,310 c-store employees in B.C.).⁸⁹

⁸⁶ Government data sources include the 2016 Census of Population, BC Stats Demographic forecasts, indexes of labour productivity and related variables, and GDP tables. These are referenced accordingly.

⁸⁷ These include: Canadian Convenience Stores Association. Canada's Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017; Canadian Convenience Stores Association. The Canadian Convenience Store Industry Facts and Figures Report, 2016; Canadian Convenience Stores Association. The Canadian Convenience Store Industry: Facts and Figures Report, 2015; and Canadian Convenience Stores Association. The Canadian Convenience Store Industry: Facts and Figures Report, 2014.

⁸⁸ It is important to note that these levers were examined in isolation and are not additive. It is likely that all reasonable levers should be adjusted, if possible, in order to fill the forecasted labour supply-demand gap.

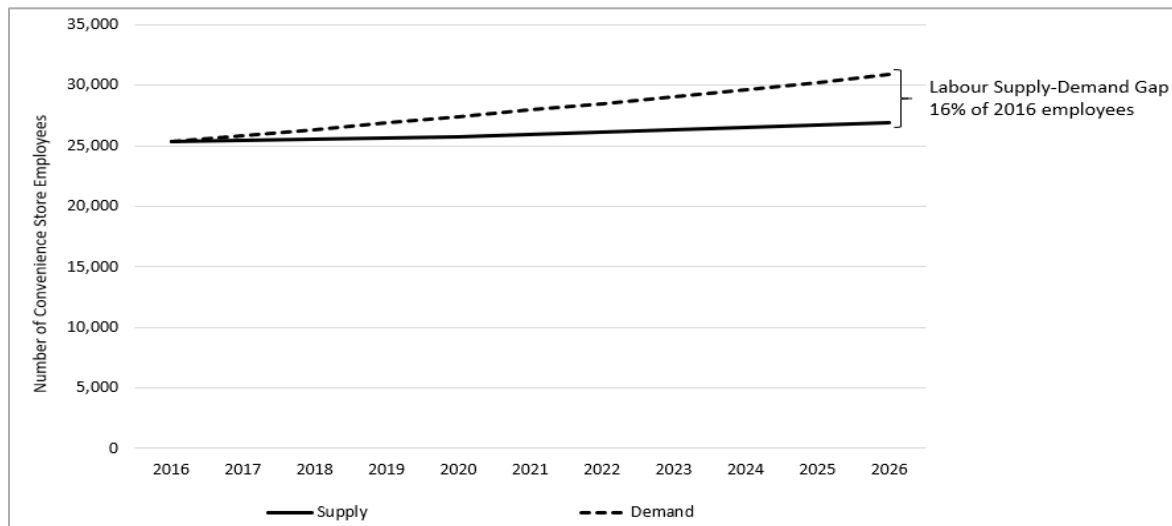
⁸⁹ Canadian Convenience Stores Association. Canada's Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017. Available online at: <https://depquebec.com/wp-content/uploads/2017/09/CCSA-2017-Annual-Facts-Figures-Report.pdf> Accessed on 5 February 2018.

- A baseline supply forecast was created by using the age profile of the workforce (using 2016 Census data for NAICS4471 - Gasoline Stations, a proxy for c-stores) and growing each age category out by its forecasted growth rate as provided by BC Stats.⁹⁰ Overall due to the aging population, older age groups grow faster than younger age groups.
- Baseline demand was forecasted to grow at a constant 2% a year from 2016 onwards. This was based on the historical growth in employment in B.C. from 2013 to 2016. Data prior to 2013 was not used due to a definitional change from the industry. From 2013 to 2016, employment in B.C. c-stores grew from 23,848 to 25,310, an annualized rate of 2%. If future demand growth is in line with historical employment growth and other factors that influence demand such as part-time rates and the utilization of automation remain constant in the c-store industry, it is expected that demand for labour will increase at the same rate historical employment growth (i.e. ~22%) from 2016 to 2026, an annualized growth rate of 2%.

Scenarios

Results from the baseline supply and demand forecast indicate that labour supply from base population/labour force growth (i.e. relying only on the growth of the population and/or the number or people in the labour force alone) will not be sufficient to meet demand growth. Specifically, labour supply is forecasted to grow at an annualized growth rate from 2016-2026 of 0.6%, or 6.3% over the entire 10-year forecast horizon. In the absence of changes from market adjustment factors, by 2026, there will be a labour demand-supply gap of 3,945 heads (i.e. people), or 15.6% of initial supply in 2016. (This labour supply gap is only theoretical as factors such as wages, and growth plans will adjust to the labour situation.)

Baseline scenario labour supply and demand for the c-store industry (2016 to 2026)



⁹⁰ BC Stats population forecasts (May 2017). Available online at: <https://www2.gov.bc.ca/gov/content/data/statistics/people-population-community/population/population-projections>; Accessed on 31 January 2018; and Schrier, Dan. March 2013. British Columbia Labour Force Participation Rate Projections: 2013 Edition. BC Stats.

Initializing supply and demand levers

A number of supply and demand levers were initialized. These are discussed below. An unemployment lever was not initialized because, due to low unemployment rates, changing this lever would not generate a significant impact. In addition, overall participation in the c-store labour force was not initialized as this was thought to be too general to generate meaningful insights for the industry.

- The percentage of women in the c-store labour force was initialized using 2016 Census data for NAICS4471 - Gasoline Stations, a proxy for c-stores. Results indicated that 45% of the workforce is female.
- The percentage of the c-store workforce aged 55+ was initialized using 2016 Census data for NAICS4471 - Gasoline Stations, a proxy for c-stores. Results indicated that 15% of the workforce was 55 years old or older.
- The percent of the c-stores employees who work part-time was initialized from CCSA reports. Reports indicated that 48% of employees work part-time. An assumption was made that a full-time employee works twice as much as a part-time one.
- The productivity level for c-stores is calculated by a productivity index with 2016 set as the base year. The productivity index in 2016 has a value of 100.

Note on data used for initialization:

- Levers were initialized using data from the 2016 Census. NAICS4471 (Gasoline Stations) was used as it is the industry group best suited to capturing the target population. Data for Gasoline Stations (NAICS4471) are considered to be more representative than Grocery Stores. This is because c-stores are more aligned to Gasoline Stations than they are to Grocery Stores (NAICS4451) in terms of type of work and size of the industry. However, data related to Gasoline Stations alone do not capture the significant number of c-stores that do not sell gas (i.e. 58% of the 2773 c-stores in B.C., according to the CCSA's 2016 industry report.⁹¹)
- Industry data from 2016⁹² was used for the best estimate of part time rates within the c-store industry because definitions of full-time and part-time in the 2016 Census available at the 4 digit NAIC level do not align with industry definitions. Specifically, the part-time/full-time split in the Census available at this level includes three categories: worked full year, full time; worked full year, part time; and worked part year, part time or full time. As Census data for part year includes both full-time and part-time work, it does not allow for a clear comparison with the part-time estimates used by CCSA (i.e. full-time is defined as 30 hours a week or more and part-time as less than 30 hours a week).
- This limitation exists only at the 4-digit NAICS level. There were no issues at the 2-digit NAICS level because the part-time/full-time breakdown aligns with the definitions used by the industry. For this reason, these data are used as a benchmark for the c-store industry.

⁹¹ Canadian Convenience Stores Association. The Canadian Convenience Store Industry Facts & Figures Report 2016.

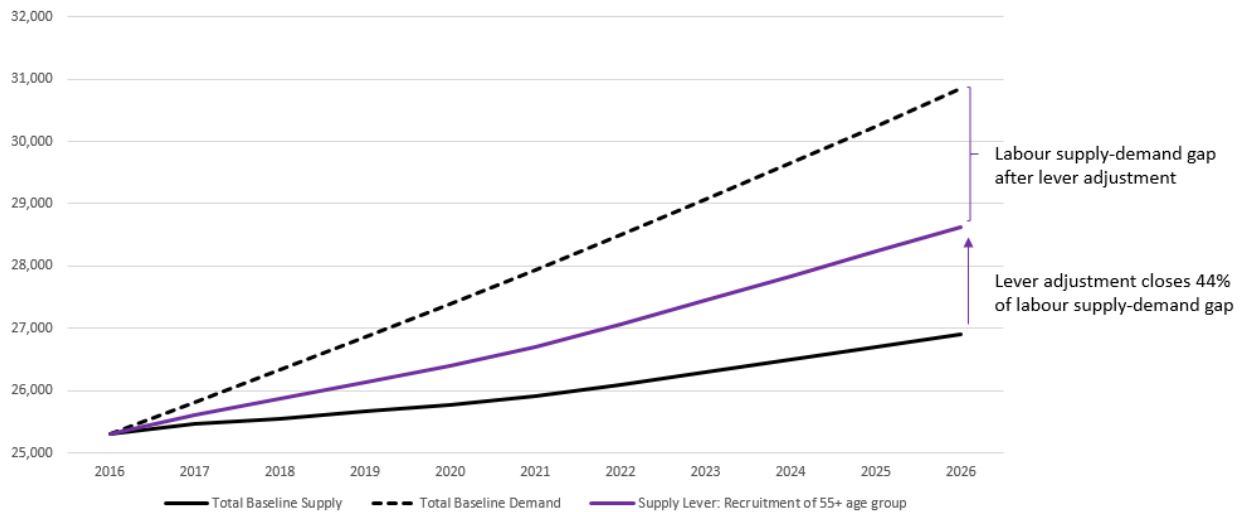
⁹² Canadian Convenience Stores Association. Canada's Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017.

Determining lever scenario values

A range of potential scenarios was developed for each lever. Scenarios were determined through alignment to relevant benchmarks.

Increasing the participation of people aged 55 years and older

The overall percentage of people aged 55 years and older in the B.C. labour force is 22.6% compared to 15.4% in NAICS4471 - Gasoline Stations (a proxy for c-stores)⁹³. Increasing the share of c-store workers from this age group from 15.4% to 22.6%, a seven percentage point increase, would result in a 1,717 more workers over 10 years, or 44% of the supply-demand gap by 2026.⁹⁴

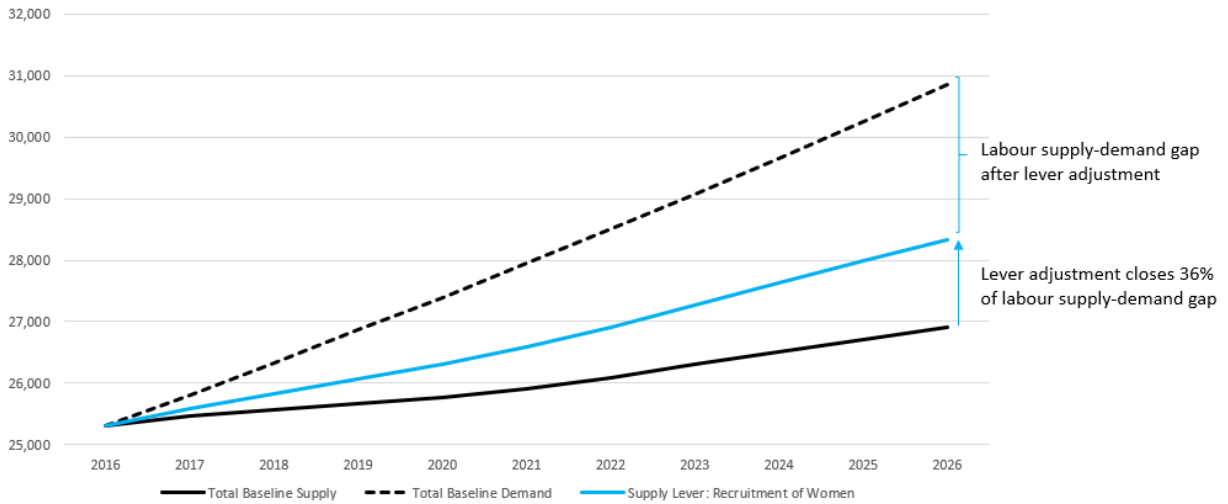


⁹³ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

⁹⁴ Numbers may not add up exactly due to rounding.

Increasing the participation of women

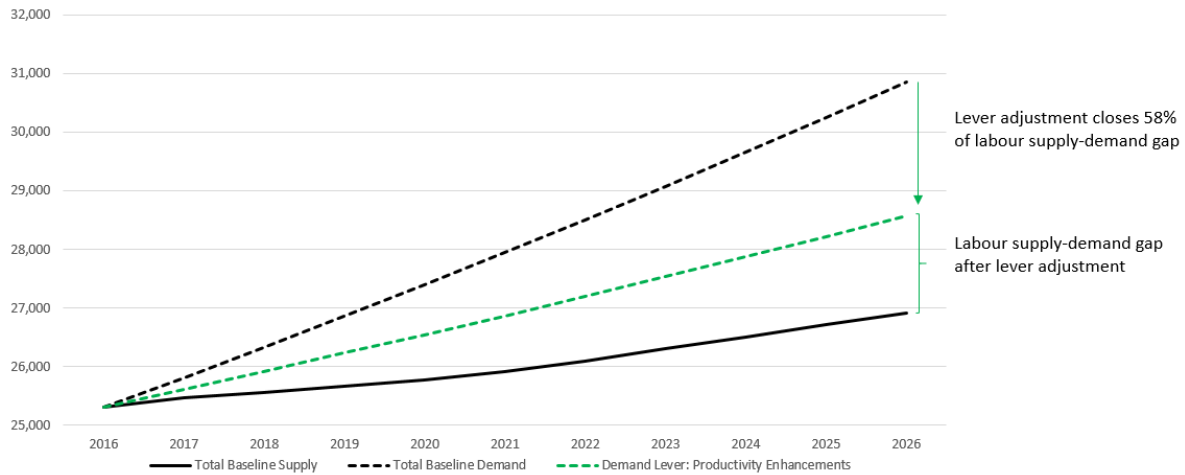
The overall percentage of women in the B.C. labour force is approximately 48.0% compared to approximately 45.2% in NAICS 4471 - Gasoline Stations, a proxy for c-stores.⁹⁵ Increasing the share of c-store workers who are women from approximately 45% to 48% would result in a 1,430 increase in the number of workers over 10 years, or 36% of the labour supply-demand gap. This would require a three percentage point increase in the share of women working in the industry.



⁹⁵ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

Improving labour productivity

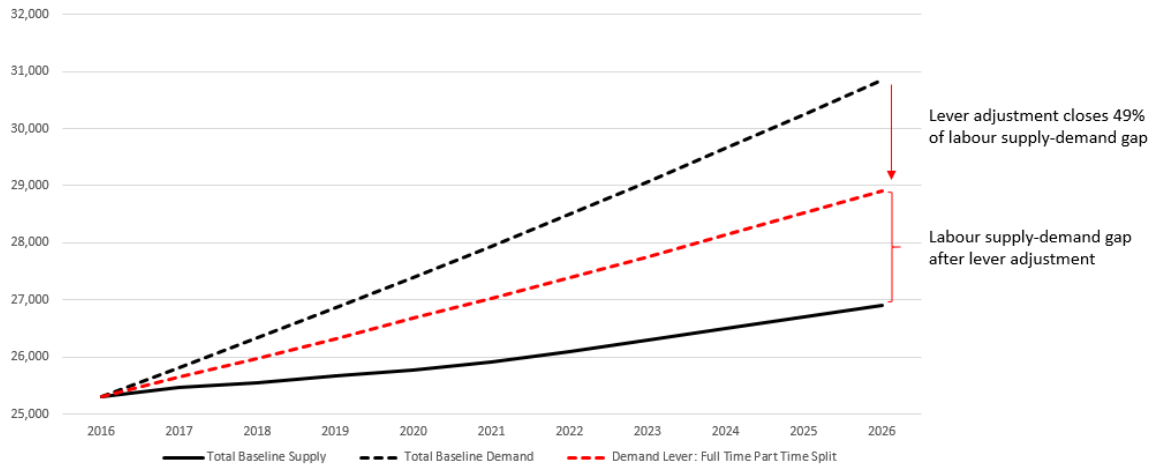
While there is no existing baseline for labour productivity, the labour supply-demand model examined the impact of increasing labour productivity by 8% over 10 years, the growth pattern in Canada from 2006-2016, according to Statistics Canada.⁹⁶ Common ways of increasing labour productivity include expanding the use of labour-saving automation (e.g. self-checkouts) and increasing the output of individual employees. Improving labour productivity would reduce labour demand by 2,285 workers, or help close the demand-supply gap by about 58% by 2026.



⁹⁶ Statistics Canada. Table 383-0012 - Indexes of labour productivity and related variables, by North American Industry Classification System (NAICS), seasonally adjusted, quarterly (index, 2007=100) (accessed: 5 February 2018)

Decreasing the part-time rate

Decreasing the part-time percentage in the c-store labour force from 48% to 37%, the industry average for the Retail Trade sector in B.C., would reduce the number of workers needed by 1,952 over 10 years, or about 49% of the gap by 2026. This would require a decrease in the part-time rate by 10 percentage points.⁹⁷ (The Retail Trade sector was used as a benchmark in this case because the nature of work in retail is a more useful comparison for c-stores than the nature of work in the overall economy.)



Limitations of the model

- The NAICS/NOCs framework for the data sources used did not go into sufficient detail to capture c-stores effectively. Data for Gasoline Stations (NAICS 4471) were used to represent c-stores. However, data related to Gasoline Stations alone do not capture the significant number of c-stores that do not sell gas, i.e. 58% of the 2773 c-stores in B.C., according to the CCSA's 2016 industry report.⁹⁸ This means that data used does not necessarily precisely reflect the specificities of the c-store industry.
- Building a baseline demand forecast in the absence of supply is difficult. This is because historical employment data reflects an equilibrium of labour supply and demand. In other words, demand is not considered in isolation.
- The justification used for participation of 55+ age group and women uses the participation of these groups in the labour force in the B.C. economy as a whole. These are very broad benchmarks.

⁹⁷ Numbers may not add up to rounding.

⁹⁸ Canadian Convenience Stores Association. The Canadian Convenience Store Industry Facts & Figures Report 2016.

Annex 7. Detailed Workforce Information

Using data from the employer and employee surveys, industry reports and Statistics Canada data, information was gathered in relation to the industry’s full-time/part-time split, characteristics of its workforce in relation to age and sex, the percentage of individuals who self-identify as Indigenous and the percentage of the workforce that is part of the Temporary Foreign Worker Program.

Typical store positions

According to the employer survey and ordered from most to least common, typical c-store positions include customer service representatives, store managers, supervisors, gas station attendants, food counter attendants and security.

Specifically, results from the employee survey indicated that a clear majority of employees (70%) are either customer service representatives/cashiers or gas station attendants. Management and supervisory positions (i.e. store managers, supervisors) make up approximately 27% of employees. There are a limited number of food counter attendant/kitchen helper, security, and other staff.

These results align with 2016 Census NOC code breakdown of the employment for “Gasoline Stations” (NAICS 4471).⁹⁹ Specifically, this data indicates that “cashiers” (NOC 6611) and “Retail salespersons” (NOC 6421) and “service station attendants” (NOC 6621) account for 74% of the Gasoline Station employment. Management and supervisory level positions (NOCS 0621 and 6211) make up approximately 24% of employment. There are limited food attendant and other employees, which account for 2% of employment for this industry group.

C-store positions compared to corresponding NOC codes for Gasoline Stations (NAICS 4471)

Gasoline Stations (NAICS 4471) by NOC code	Percentage¹⁰⁰	C-stores Position	Percentage¹⁰¹
6611 Cashiers & 6421 Retail salespersons	47%	Customer Service Representative/Cashier	39%
6621 Service station attendants	28%	Gas Station Attendant	31%
0621 Retail and wholesale trade managers	21%	Store Manager	20%
6211 Retail sales supervisors	3%	Supervisor	7%
Other ¹⁰²	2%	Other ¹⁰³	3%

⁹⁹ Source: Statistics Canada, 2016 Census of Population, custom request through the B.C. Labour Market Information Office.

¹⁰⁰ This represents the share of the population in the labour force for NAICS 4471 across the eight NOC codes used in this report. Statistics Canada, 2016 Census of Population, custom request through the B.C. Labour Market Information Office. Numbers may not add due to rounding.

¹⁰¹ These results are from the employee survey conducted for this report.

¹⁰² These include 6222 Retail and wholesale buyers (0.2%), 6711 Food counter attendants, kitchen helpers and related support occupations (1%), and 6622 Store shelf stockers, clerks and order fillers (1%).

¹⁰³ These include the food counter attendant/kitchen helper, security, and “other” survey categories.

Typical wages

The average wages for c-stores was examined.¹⁰⁴ Results revealed that wages for non-managerial positions (customer service representatives; gas station attendants; food counter attendants; and security) are close to the minimum wage, with the majority of the wages falling between \$11.35 and \$13.00 per hour. The wages for managerial positions (supervisors, store managers) are higher with the majority of supervisors earning between \$13.00 and \$15.00 per hour, and store managers earning \$15.00 and \$20.00 per hour. Data from the Survey of Employment, Payrolls and Hours (SEPH) was used as comparable wage rates (excluding overtime).¹⁰⁵ SEPH data indicated that average wages (excluding overtime) were \$15.31 per hour for Grocery Stores (NAICS4451) and \$14.52 per hour for Gasoline Stations (NAICS447, 4471) and \$17.17 per hour for Retail Trade (NAICS44-45) in B.C. in 2015. With the exception of store manager positions, other c-store positions make less than the average for comparable industries.

Distribution of wages across all store positions¹⁰⁶

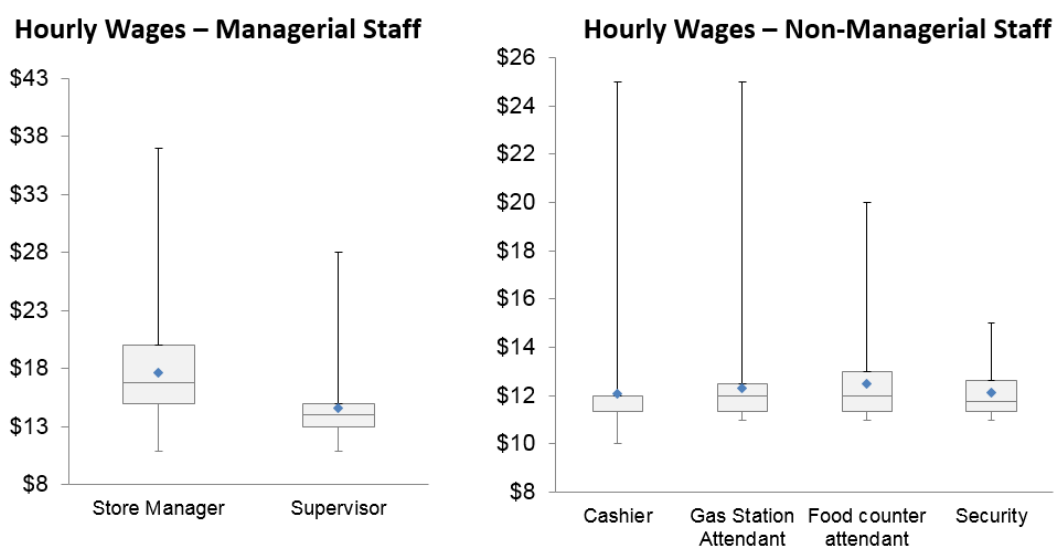
	Store Manager	Supervisor	Cashier	Gas Station Attendant	Food counter attendant	Security
Max	\$37.00	\$28.00	\$25.00	\$25.00	\$20.00	\$15.00
Q3	\$20.00	\$15.00	\$12.00	\$12.50	\$13.00	\$12.63
Median	\$16.75	\$14.00	\$12.00	\$12.00	\$12.00	\$11.75
Average	\$17.63	\$14.63	\$12.07	\$12.30	\$12.47	\$12.11
Q1	\$15.00	\$13.00	\$11.35	\$11.35	\$11.35	\$11.35
Min	\$10.85	\$10.85	\$10.00	\$11.00	\$11.00	\$11.00
Count	90	85	116	40	23	10

¹⁰⁴ Results were not weighted by the number of staff and were trimmed to ensure that nothing below the minimum wage was reported and to remove extreme outliers (i.e. \$45/hour for a food counter attendant).

¹⁰⁵ Statistics Canada. Table 281-0030- Survey of Employment, Payrolls and Hours (SEPH), average hourly earnings for employees paid by the hour, by overtime status and detailed North American Industry Classification System (NAICS), annual (current dollars), CANSIM (database). Accessed on 16 February 2018.

¹⁰⁶ The sources for this data is surveys conducted for this report.

When graphically represented with a box and whisker plot, the following is shown:



There is a wide range of wages for all positions. The minimum for each position is close to minimum wage, and the maximum wage rate is significantly higher than average wages. Despite the wide range of minimum and maximum, the majority of wages listed had a very tight distribution. The interquartile range (Q3-Q1) for non-managerial staff was less than \$2.00 for all positions. Only store managers had a larger interquartile range of \$5.00. Wages for non-managerial positions are close to the minimum wage, with the majority of the wages between \$11.35 and \$13.00 per hour.¹⁰⁷ Wages for managerial positions are higher with the majority of supervisors earning between \$13.00 to \$15.00 per hour, and store managers earning \$15.00 to \$20.00.

Survey data on wage rates for various positions are within the compensation range but with a much narrower band with respect to the high end of the range than wage-related data for similar NOCs, according to the B.C. Labour Market Outlook: 2017 Edition.¹⁰⁸ This is not altogether surprising since wage-related data for from the B.C. Labour Market Outlook is sourced from multiple industries and therefore reflects the diversity of wages across industries.

¹⁰⁷ For the cashier position, the 75th percentile is the same as the median, resulting in the top of the box being the same as the median line.

¹⁰⁸ WorkBC. B.C. Labour Market Outlook: 2017 Edition. Available online at:

https://www.workbc.ca/getmedia/66fd0e7c-734e-4fcb-b1a6-0454862525a6/BC_Labour_Market_Outlook_2017_Edition_Nov_2017.PDF.aspx. Accessed on: 5 February 2018.

C-store wages compared to wages for relevant NOC codes

C-Store position	C-Store Wage Range ¹⁰⁹	Position (NOC)	Wage Range (NOC) ¹¹⁰
Store Manager	\$15.00-\$20.00	0621 Retail and wholesale trade managers	\$14.25-\$52.40
Supervisor	\$13.00-\$15.00	6211 Retail sales supervisors	\$12.00-\$29.81
Cashier	\$11.35-\$12.00	6611 Cashiers	\$10.85-\$18.00
Gas Station Attendant	\$11.35-\$12.50	6621 Service station attendants	\$10.85-\$15.00
Food counter attendant	\$11.35-\$13.00	6711 Food counter attendants, kitchen helpers and related support occupations	\$10.85-\$16.00

Full-time/part-time split

Approximately 48% of c-store employees work part-time (defined as less than 30 hours per week), compared to approximately 37% for the Retail Trade sector and 26% and 23% for the provincial and national economies, respectively. Data from the CCSA 2017 industry report were used to determine the industry's part-time/full-time split due to limitations with 2016 Census as well as LFS data.

Full-time/part-time split of c-store employees compared to the Retail Trade sector and the provincial and national economies

	2017 CCSA report ¹¹¹	2016 Census ¹¹²				Surveys	
		B.C. Retail Trade (44-45)	B.C. All NAICS	Canada Retail Trade (44-45)	Canada All NAICS	Employee survey	Employer survey
Part-time	48%	37%	26%	39%	23%	32%	47%
Full-time	52%	63%	74%	61%	77%	68%	53%

¹⁰⁹ C-store wage information is sourced from the employer survey conducted for this report.

¹¹⁰ Wage ranges are presented from low to high and are sourced from WorkBC. B.C. Labour Market Outlook: 2017 Edition. Available online at: https://www.workbc.ca/getmedia/66fd0e7c-734e-4fcb-b1a6-0454862525a6/BC_Labour_Market_Outlook_2017_Edition_Nov_2017.PDF.aspx. Accessed on: 5 February 2018.

¹¹¹ Canadian Convenience Store Association. Canada's Convenience and Fuel Retail Channel: Annual Facts and Figures Report, 2017.

¹¹² Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016300

Age distribution

Additional data from the 2016 Census was obtained, which focused only on NOCs present in the C-store industry in B.C. According to this data, a comparison with Gasoline Stations (4471) (the closest proxy for c-stores) in B.C. found that the c-store workforce has a similar proportion of staff in the 15 to 24 year old age range, a higher representation of 25 to 34 year olds, and a proportionately lower representation of people aged 35 to 54 years and 55 years or older, compared to the provincial and national economies. (Gasoline Stations were used to check reasonability of survey findings around sex distribution. This is because c-stores are more aligned to Gasoline Stations than they are to Grocery Stores (NAICS 4451) in terms of type of work and size of the industry.) This data had a less detailed age breakdown and comparison results are shown below. There is minimal difference between the overall NAICS-related information, and the NAICS-related information restricted specifically to c-store related occupations.

Workforce distributions based on age¹¹³

Age distribution	2016 Census ¹¹⁴				Surveys	
	B.C. 4471 Gasoline Stations	B.C. 4451 Grocery Stores	B.C. (All NAICS)	Canada (All NAICS)	Employee survey	Employer survey
15 to 24 years	30%	30%	13%	14%	31%	35%
25 to 34 years	21%	16%	21%	21%	32%	33%
35 to 54 years	34%	36%	43%	44%	29%	23%
55 years or older	15%	18%	23%	21%	9%	9%

Sex distribution

The percentage of women in the Gasoline Stations industry group (4471) (the closest proxy for c-stores) workforce is approximately 45%, compared to 48% in the provincial and national economies. These distributions align with results from the employer and employee surveys.

¹¹³ All data in this table, other than the data from the employer and employee surveys is from Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

¹¹⁴ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

Workforce distribution based on sex

Sex distribution	2016 Census ¹¹⁵			Surveys	
	B.C.	B.C.	Canada	Employer survey	Employee survey
	4471 Gasoline Stations	(All NAICS)	(All NAICS)	-	-
Male	55%	52%	52%	59%	59%
Female	45%	48%	48%	41%	41%

Participation of individuals who self-identify as Indigenous (First Nation, Métis, Inuit)

The employer survey asked employers what percentage of their workforce self-identify as Indigenous (First Nation, Métis, Inuit). Results indicated that employers thought that approximately 13.7% of their employees self-identify as Indigenous.¹¹⁶ This is significantly higher than the percentage of Indigenous people in the province's overall labour force (4.5% in 2017) and the national labour force (3.1% in 2017).¹¹⁷ Furthermore, when benchmarked for comparable industries and occupations the overall share of Indigenous people in the labour force was 2.9%. (This is the same measure as the 3.1% referenced above, but because of slightly different LFS source tables, the numbers are different). The share of Indigenous people in Wholesale and Retail Trade sector (NAICS 41, 44-45) is 2.9%.¹¹⁸ The share of Indigenous people in the sales and services occupation (NOC 6) is 3.4%.¹¹⁹ In short, Indigenous people seem to be over-represented in the c-store industry but not in the broader NAICS and NOC groupings to which c-stores belong.

These findings align with the 2016 Census data which indicate that 13% of the labour force in Gasoline Stations (NAICS 4471) who work in the eight NOC codes also found in the c-store industry (i.e. 0621 (retail and wholesale trade managers); 6211 (retail sales supervisors); 6421 (retail salespersons); 6611 (cashiers); 6621 (service station attendants); 6622 (store shelf stockers, clerks and order fillers); 6711 (food counter attendants, kitchen helpers, related support occupations); and 6222 (specialists in wholesale trade and retail and wholesale buyers) identify as "Aboriginal."¹²⁰

¹¹⁵ Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016290

¹¹⁶ The percentage of c-store employees in B.C. that self-identify as Indigenous for overall industry was identified by weighting the percentage of Indigenous people by total employees.

¹¹⁷ Statistics Canada. Table 282-0226 - Labour Force Survey estimates (LFS), by Aboriginal group, sex and age group, Canada, selected provinces and regions, annual (persons unless otherwise noted) (accessed: January 30, 2018)

¹¹⁸ Statistics Canada. Table 282-0229 - Labour Force Survey estimates (LFS), employment by Aboriginal group, North American Industry Classification System (NAICS), sex and age group, annual (persons) (accessed: February 01, 2018)

¹¹⁹ Statistics Canada. Table 282-0165 - Labour Force Survey estimates (LFS), employment by Aboriginal group, National Occupational Classification (NOC), sex and age group, annual (persons) (accessed: February 01, 2018)

¹²⁰ Source: Statistics Canada, 2016 Census of Population, custom request through the B.C. Labour Market Information Office.

Sample NAICS	% of Aboriginal workers ¹²¹
Total, all industries	2.9%
Goods-producing sector [11-33]	3.2%
Agriculture, natural resources and utilities [11-22]	4.2%
Construction [23]	4.1%
Manufacturing [31-33]	2.0%
Services-producing sector [41-91]	2.9%
Wholesale and retail trade [41, 44-45]	2.9%
Transportation and warehousing [48-49]	2.8%
Finance, insurance, real estate, rental and leasing [52-53]	1.6%
Professional, scientific and technical services [54]	1.5%
Business, building and other support services [55-56]	3.3%
Educational services [61]	2.8%
Health care and social assistance [62]	3.2%
Information, culture and recreation [51 71]	2.6%
Accommodation and food services [72]	4.0%
Other services (except public administration) [81]	3.4%
Public administration [91]	3.6%

In addition, survey results reveal that employees who self-identify as Indigenous are concentrated in certain stores. A significant proportion of convenience stores (65.8% of the 164 respondents to this question) indicated that they hired no Indigenous employees.

Temporary Foreign Workers

The employer survey (n=156) indicated that 19% of their total workforce were Temporary Foreign Workers. There is a high concentration of this population among certain employers. Seventy-eight percent of respondents indicated that they had never used the Temporary Foreign Worker Program or, if they have used it in the past, they currently employ no Temporary Foreign Workers. Of the remaining 32 employers who indicated that they have used the program and employ at least some Temporary Foreign Workers, 43% of their total employees were Temporary Foreign Workers. Of these 32 employers, 78% are chains.

¹²¹ Statistics Canada. Table 282-0226 - Labour Force Survey estimates (LFS), by Aboriginal group, sex and age group, Canada, selected provinces and regions, annual (persons unless otherwise noted) (accessed: January 30, 2018)

Annex 8. Project Steering Committee

Name	Position	Company
David Charon	Senior Area Retail Licensee Manager	Suncor
Shirley Dickman	Senior Area Retail Licensee Manager	Suncor
Rajit Jain,	Owner, Direct Business Associate for Mac's Convenience Store	Mac's Convenience Stores
Paul Jaswal,	Owner - Retailer	Husky
Mandip Sekhon	Owner, Direct Business Associate for Mac's Convenience Store	Mac's Convenience Stores
Nicole Siaus	Owner-Retailer	Husky
Dimple Sokhi	Area Retail Licensee, Owner	Suncor
Harjinder Sokhi,	Manager	Suncor
Balbir Singh	President of a number of companies that operate Mac's convenience stores	Mac's Convenience Stores
Renee Turenne	Owner	Canadian Tire Gas Bar

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