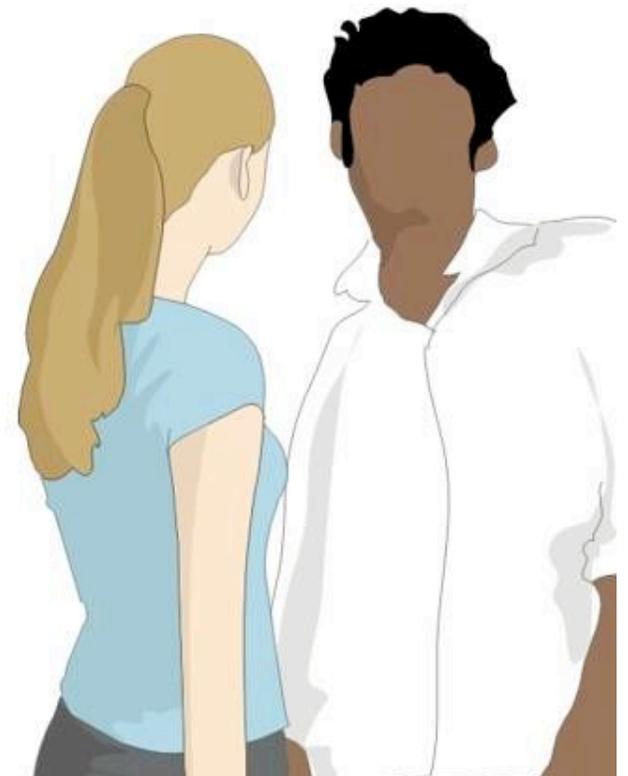


# Young Canadians Now

Presented by Max Valiquette

Presented to NATCON

January 25, 2005



# about youthography

- Founded in 2001, Youthography is Canada's leading youth marketing consultancy
- Youth market research, strategy and marketing
- Plenty of research (quant and qual)
  - We put 'youth at the epicenter'
- A lot of marketing
  - 'money where mouth is' factor



# agency model

- Youthography is not a traditional agency
- Traditional agencies pick the thing that they do and then do it for everyone
  - We do the opposite: we do lots of things but for one distinct demographic
- We respond to a market, rather than a product...  
...and are in constant touch with the niches of that market



# some of our clients



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# contents

- demographics
- psychographics and values
- students
- youth trends right now
- media
- ping: youth culture update, winter '04
- attracting and retaining young Canadian workers



# sources

- Qualitative and quantitative research
  - Regular online surveying of young Canadians
  - Focus and immersion groups
- Our youth community of approximately 14,000 +
- Ping
  - Current trends and related stats
- Statistics Canada
  - Will refer to periodically



# demographics



# the 4 x 5 factor

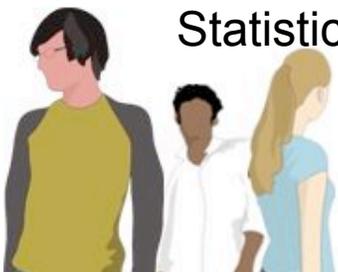
- The 10-29 population divides into **four equal five-year cohorts**
- **This is the one thing you need to know...**



# demographics

Age	Male / Female (number)	Male / Female (% of population)
10-14	2,117,600	6.7
15-19	2,120,500	6.7
20-24	2,188,500	6.9
25-29	2,118,100	6.7
<b>TOTAL 10-29</b>	<b>8,544,700</b>	<b>27</b>

Statistics Canada, 2003



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# demographics

- 80% of them come from families with only 1-2 children at home
- 60% of women work out of home
- 67% of unmarried 20-24-year-olds live at home



# demographics

- 88% high school completion rate
- 1 in every 2 young people (20-24) attending post-secondary school
- More students working part-time and taking longer to graduate



# impact

- These demographic factors drive more youth trends than anything else...  
...keep this in mind as we move forward



# psychographics and values



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# psychographics

- There is a **prolonged pre-adult life stage**
- **This is the one thing you need to know...**



# psychographics

- Many youth 'values' actually have their roots in demographics...
- Fewer siblings at home = **reliance on friends**
- Single parent households = **greater self-reliance**
- Six-pocket syndrome = **more as-needed cash**
- Immigration = **colour blindness and diversity**



# psychographics

- Partially getting into adulthood earlier, but fully getting into adulthood later than ever...
- Average age of 1<sup>st</sup> menstruation = **12**
- Average age of 1<sup>st</sup> cigarette = **13**
- Average age of 1<sup>st</sup> intercourse = **16 (>)**
- Average age at graduation = **26 (mean 23)**
- Average age of 1<sup>st</sup> marriage = **29**
- Average age of 1<sup>st</sup> childbirth = **29**



# psychographics

- **Think about this:** how old is someone who is on-line all the time, likes movies, has a cell phone and texts with it, is in school but working part-time, sort of knows what they want to do with their life, is unmarried, childless, drinks beer, has sex, lives at home, and smokes a bit of dope on some weekends?
- **Are they 15, or 25?**

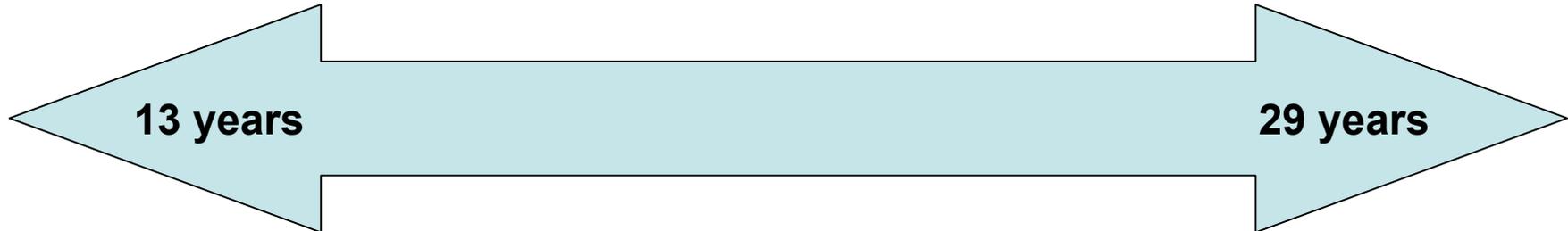


# impact

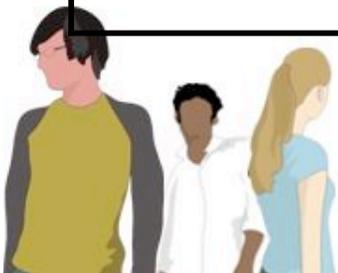
- Some responsibilities earlier, but full responsibilities later
- They have more money to spend on food, fashion and fun than any other generation before
- ‘Save to Spend’ mentality
  - Some saving, but short-term (so far)
- Full adult purchases come later than ever



# life stage borrowing



<b>All Video Games</b>	<b>Networked Games</b>
Downloading mp3s	<b>Downloading DivX movies</b>
Buying a Tim's double-double	<b>Brewing specialty coffee</b>
<b>Skate and Snow Boarding</b>	Board Culture Brand Apparel



# youth profile

- Psychographic trending with youth in Canada continues to show a group that puts high priority on:
  - Responsibility (to self and society)
  - Balance
  - Individually



# youth profile

- Considered by many to be a ‘hope generation’
- They want to change things
  - Focus on individual expression and creativity
  - Diversity of opinion and experience essential to this culture
  - Adbusters movement
  - A sense of being accountable



# youth profile

- Intensely aware of the world but not overwhelmed by it
- The late '90s focus on 'everything fast, everything new' is becoming balanced by a meaningful sense of responsibility and pragmatism



# ...so remember, it's a high churn group

- They're moving! The only constant is change...
- ...rather than looking at fads, we try to look at trends
- The best way to connect isn't to segment them into tribes or to try to catch the latest thing, but to understand their values

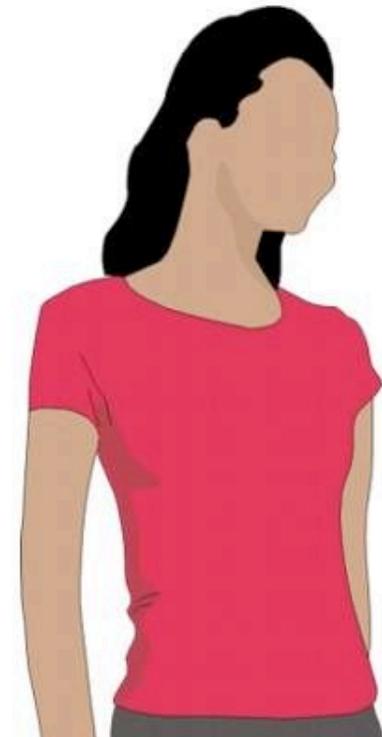


# what they value

- Communication
- Relationships
- Information
- Diversity
- Empowerment
- And what sews it all together...Technology



# youth trends right now



# youth trends right now

- Rehumanization
  - The Big Trend
- Transition
  - Seen obviously in the two most important ‘youth industries’ – technology and entertainment – but also in terms of key values



# rehumanization

- Re'-hiu:'maeniza-shun (v)
- To portray or endow with human characteristics or attributes
- An increasing need for a more human/ real approach to life; a cultural backlash to the ubiquity of technology



# rehumanization

- Considering the world around us over the last 5 years, we see young Canadians reacting to macro trends:
  - Technology for technology's sake
  - Change and dramatic events in the world at large
  - Economic and job growth that is slower than the past
- They've reacted by seeking support for the human experience, managed change, and a more balanced mentality to their expectations



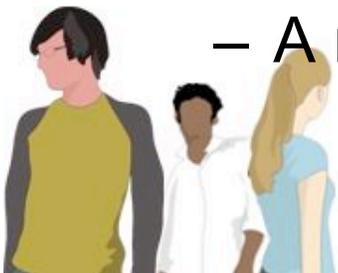
# rehumanization

- What is it?
  - A raw and visceral approach to life and culture
- What does it look like?
  - Traditional touchstones being revitalized
  - ‘more flesh to metal’
  - Personal connection being added to regular rituals
- Where does it come from?
  - Backlash against over-reliance on technology
  - Sept 11, war, economic crisis, millennial angst
  - Time to get back in touch with ourselves and our culture



# rehumanization

- Examples
  - Throwback fashions (from the '80s and even the '50s)
  - Rock and f#%cking roll
  - Serif fonts, ink and more traditional media
  - Retro team jerseys and pond hockey
  - Filmed comics, massively popular 'old' genres
  - 'natural' food, comfort food, old-school drinks
- What is it not?
  - A rejection of technology or modernity



# rehumanization themes

- *Customization*
  - Look for human-sort of customization; even personalization
- *Viscerality*
  - Look for things that hit us in our gut instead of in our head
- *Corporate rejection*
  - Look for preferences pointing to smaller, more independent-feeling companies
- *Re-appropriation*
  - Look for reapplying concepts from one realm to another



# transition

- Traen'zi-shun (n)
- A period of time marked by repeated change
- A prolonged period of time between two life stages



# transition

- Young Canadians, who adopt new technologies a quickly, or more quickly, than that of most Western nations, have spent the past few years moving from one form of technology to another – so much so that the norm is now transition



# transition

- What is it?
  - A sense we are between developments or in the midst of developing
  - Seen in entertainment and technology arenas, but also strongly in values matrix
- What does it look like?
  - Experimentation; a desire to wait for the right thing
- Where does it come from?
  - A complete paradigm shift in the way entertainment is consumed ( and a sense that it is still shifting)
  - Formats and functionalities that haven't been settled upon; something new everyday
  - Changing culture to suit their worldview



# transition

- Young people using many different gadgets and technologies...
  - Music and software, movies and TV on your PC
  - Content (here and forthcoming) on your cell phone
  - VOD, digital cable, personal dishes for your TV
  - Web radio
  - ESPN / ABC Motion
  - iPod
  - PCs reading and burning CDs and DVDs
- What it is not?
  - A reason to stagnate



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# transition

	<b>Total</b>
I do not download	17%
MP3s (and other music files)	85%
Pictures (any photos or graphics)	55%
Games	42%
Movie trailers	34%
Software	32%
Music videos	27%
Movies (complete movies)	25%
TV shows (complete programs)	18%
Pornographic content	13%
Books (text or audio)	13%
Essays	6%
TV commercials	5%

N=1258, Canadian Youth 13-29, Ping Survey, July 2004



# transition

<b>N=1067</b> <b>National profiling study/ April 2004/ 13-29-year-olds</b>	<b>Top box results</b> <b>1-5 scale</b>
Getting formally married	68.2%
-VS-	
Having a lifelong partner	81.3%
Going to Church, Synagogue or Mosque	43.8%
-VS-	
Finding your own religion/defining your spirituality	51.8%

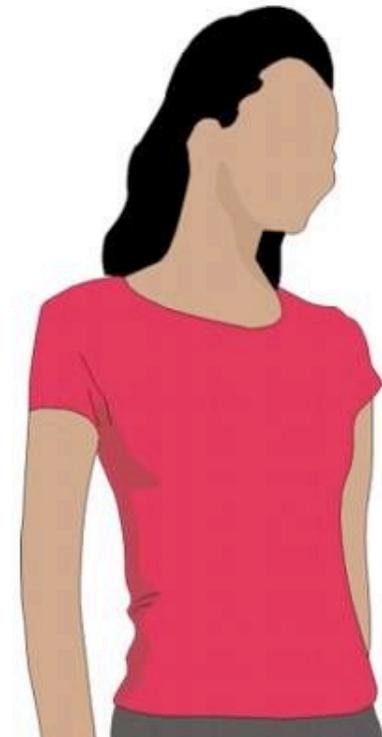


# transition themes

- *New formats*
  - Look for the rise of new formats to dominate the market
- *Start and Stop*
  - Look for the halt and go indicating change that should eventually settle
- *Value shift*
  - Look for priorities to change in the eyes of consumers



# students



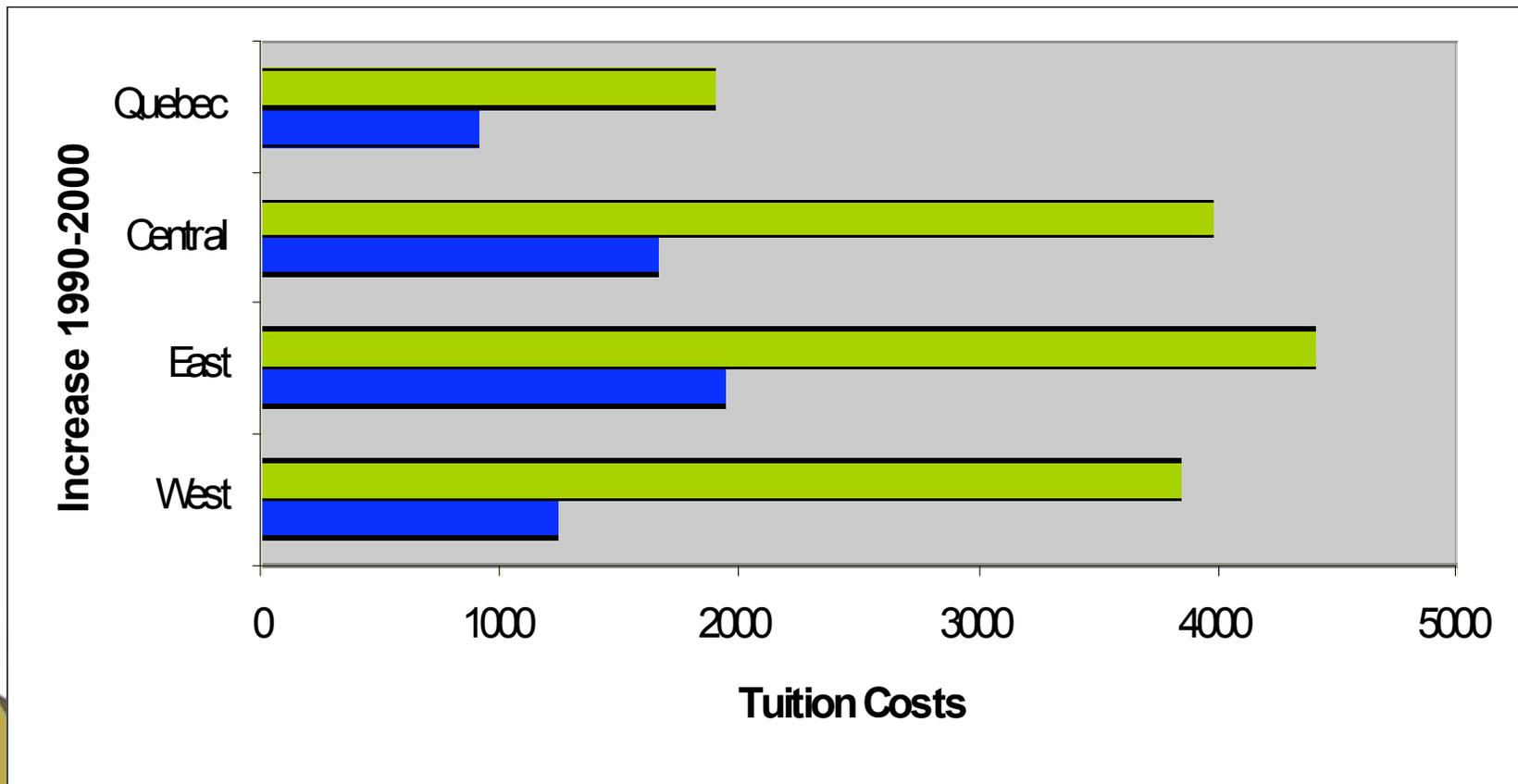
# students

- The one thing you need to know:
  - There are lots of them!
- More young people are attending post-secondary school
  - In 2002, there was a 16% increase in Ontario university enrolment
- They are working more and spending more...
  - And yes, starting to consider saving for their future education earlier



# the cost of post-secondary education

- They need more money than ever
  - Average tuition increased over 135% over the last 10 years
  - Average tuition in 2003 was \$4,025 nationally



# student debt upon graduation

- About half of college and university grads left school owing money for their education, mostly from government student loan programs
- One in seven university graduates owe 25K or more in government student loans upon graduating
- More are working part-time and taking longer to graduate

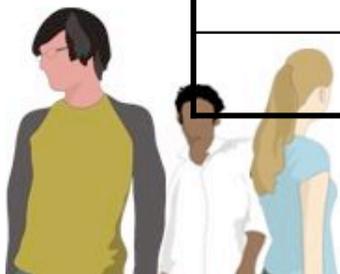


# sources of school funding

Which sources, if any, are you depending on to help you fund your upcoming year of study?

	<b>Total</b>
Personal earnings / savings	78%
Parents/relatives	60%
Scholarship/ bursary / grant	59%
Federal government loan (CSL)	36%
Provincial government loan	27%
Bank loan	18%
Company / Work pays	1%
RESP	1%
Other	1%

N=1258, Canadian Youth 13-29, Ping Survey, July 2004



# post-secondary school

- Also a time of experimentation and development
- Youth 'values' or 'psychographics' are in full swing...
  - ...whether they live at home or not



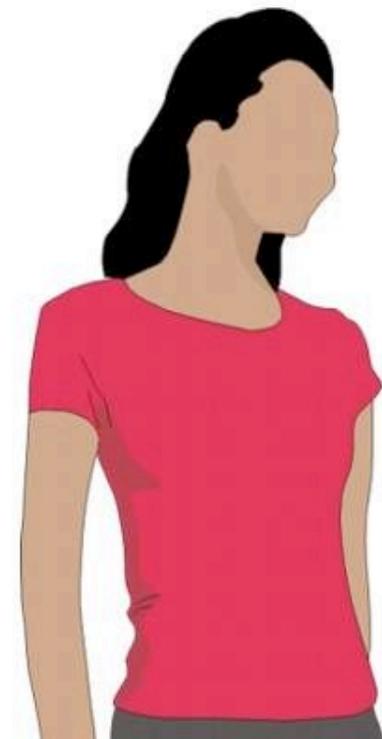
# work and school

Simply rate each of the following concepts, ideas or values in terms of their importance to YOUR LIFE

n=1480 Internal National Study / Spring 2004 / 13-29 year old	Top Box Results			
	Total	13-17	18-22	23-29
Developing new skills	90.9%	86.9%	91%	94.8%
Getting formally educated	88.9%	81.7%	90.6%	84.9%
Finding things out for yourself	84%	79.7%	84.2%	87.8%
Having a lifelong career	82.8%	88.3%	87.7%	80.2%
Being informed about current events	65.6%	61.1%	64%	73.8%
Being street smart	58.4%	61.4%	58.9%	54.1%
Starting your own business	32.2%	30.6%	31.7%	34.2%



# media



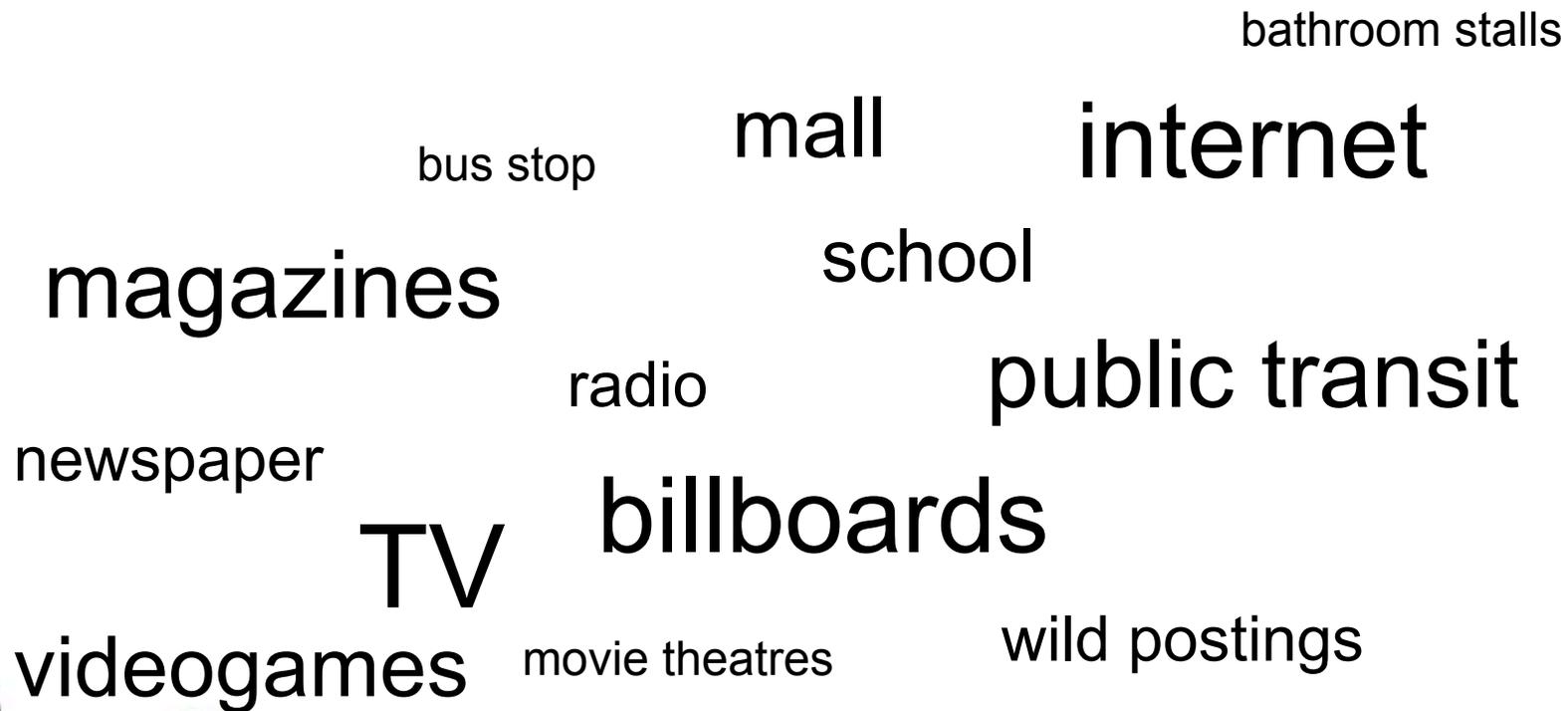
# media in transition

- **There has never been such a huge shift in media habits as over the past decade**
- **This is the one thing you need to know...**



# media in transition

- Media exposure in an average day for youth:



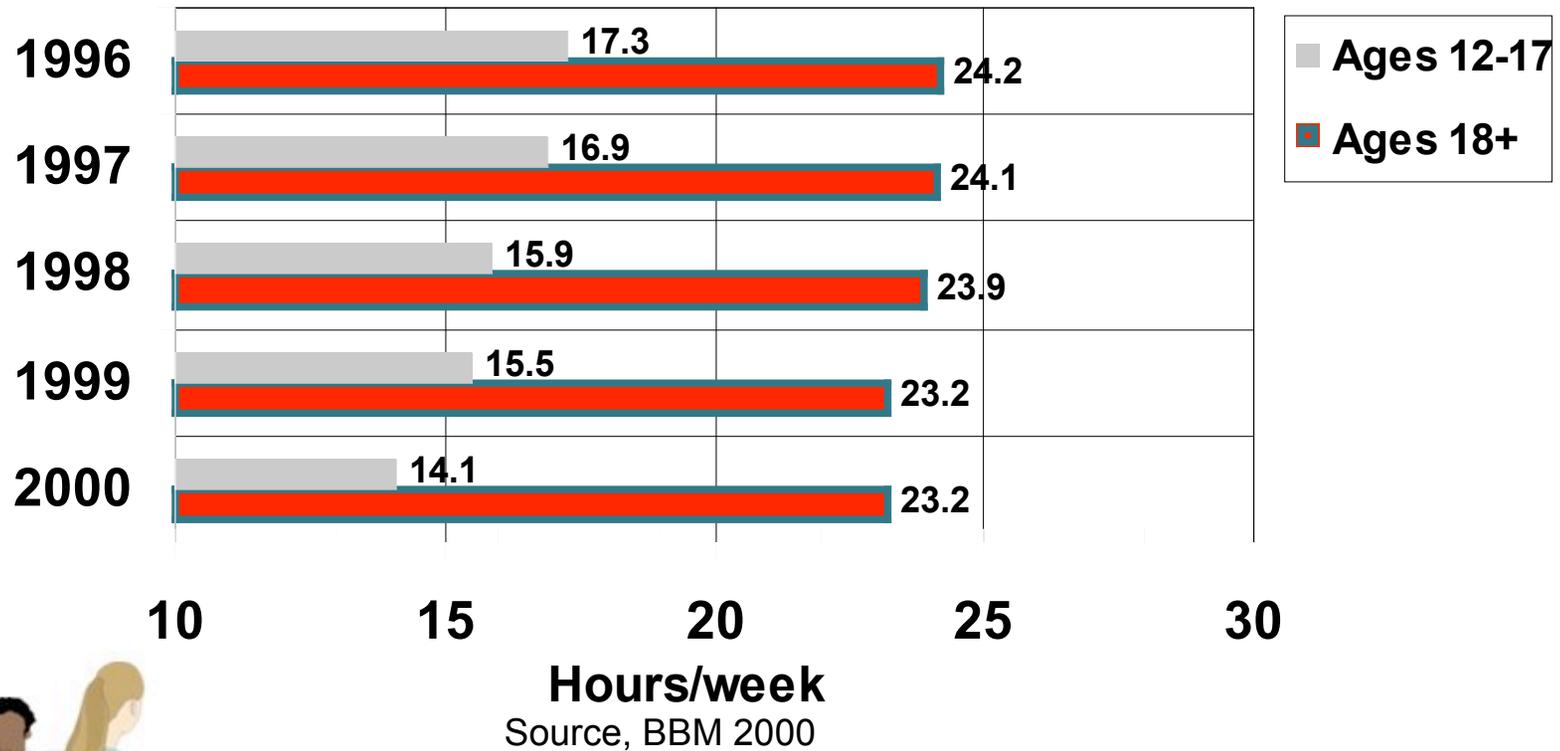
# media in transition

- Internet progression and adoption was incredibly fast compared to that of television:
  - 1994: Introduction of the Internet
  - 1995: In offices
  - 2001: In nearly every home and school; 9/10 of young people have “regular Internet access”
  - 2003: 54% of households have at least one member regularly using the Internet *at home*



# television vs. the Internet

- Based on BBM Statistics, teen television watching decreased by over 3 hours a week from 1996 to 2000...  
...versus one hour for 18+



# time spent

AVERAGE HOURS SPENT EACH WEEK ON THE FOLLOWING MEDIA	Total 9-29	9-15	16-18	19-24	25-29
Listening to the radio	5.08	5.70	4.34	4.44	8.10
Listening to online radio	4.72	0.87	4.27	5.35	10.20
Reading a daily newspaper (local, national, regional, or international)	1.32	0.73	1.18	1.48	2.13
Reading a local urban weekly newspaper	1.76	0.57	1.48	2.15	3.16
Reading a magazine	1.19	2.15	1.01	0.96	0.81
Riding public transit	2.01	0.97	2.38	2.26	2.05
Using the Internet for news and entertainment	4.52	5.32	4.74	4.74	1.85
Using the Internet for work or studies	6.61	4.03	7.11	7.13	7.98
Using the Internet to communicate (e-mail, IM, etc.)	9.34	8.03	9.38	9.23	11.89
Watching television	9.86	12.36	9.02	8.89	11.08

n=1538, Canadian youth 9-29, Ping survey, Oct 2004



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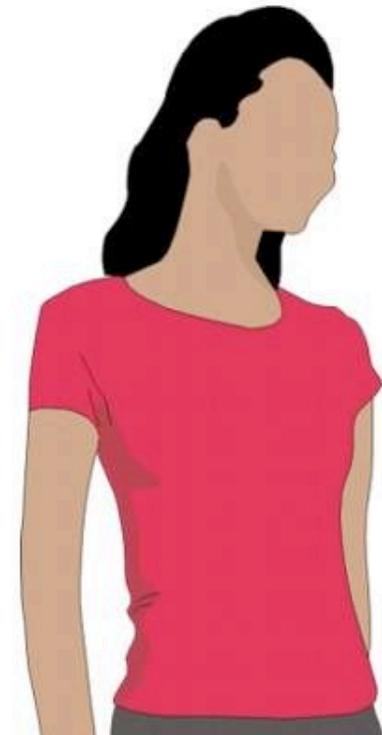


# impact

- Traditional mass media is not dead...
  - However, youth are gaining access to TV via computers and are watching movies outside the theatre in the comfort of home
- To effectively reach youth companies should consider a more varied media mix
  - *“I don’t know why I don’t see more advertising in the kinds of magazines I read? Don’t they (the advertisers) pay attention to us?”* – Male, 18, Youthography Community member



# youth culture update winter '04



# music

- Rock 'n Roll continues to rule!
  - Arena rock comeback?
- The art & music scenes together
- Hip Hop still mega on the charts, but we need something new
  - Watch for the infusion of funk, gospel, old school, reggae and folk



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# music

- Increasing role in brand promotions
  - Rogers' "Simple Plan"
  - Solo Music Series by Bell
- Videogame soundtracks are becoming increasingly popular
  - Tony Hawk Underground wins MTV Music Award
  - Grand Theft Auto releases 8-CD box set



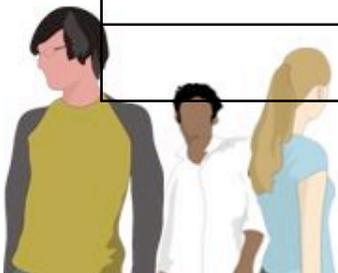
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# top music artists

Q3 July / August 2004	Rank	Q2 May/June 2004
<b>Usher</b>	<b>1</b>	Linkin Park
Black Eyed Peas	<b>2</b>	Nickelback / Chad Kroeger
Linkin Park	<b>3</b>	Black Eyed Peas
U2	<b>4</b>	U2
Evanescence	<b>5</b>	Evanescence
Avril Lavigne	<b>6</b>	<b>Coldplay</b>
<b>Eminem</b>	<b>7</b>	<b>Outkast</b>
Dave Matthews	<b>8</b>	<b>Beyoncé</b>
<b>Billy Talent</b>	<b>9</b>	Dave Matthews
Nickelback / Chad Kroeger	<b>10</b>	<b>Radiohead</b>
<b>50 Cent</b>	<b>11</b>	Avril Lavigne
<b>Hoobastank</b>	<b>12</b>	<b>Metallica</b>

N=1257, Ping National Study (13-29-year-olds) / August 2004



# movies

- Content drought
  - Sequels and comic books are prime sources of material
  - Re-appropriation of content
- The BIG opening weekend
  - No more movies that last a whole season (or even a whole month)



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# movies

- The golden age of CGI
  - Incredible effects, incredible properties; but bad stories are turning moviegoers off
  - Viscerality: flash is not enough, a good story gives backbone (the emotionally resonant action movie)



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# fashion

- Retro anything
  - Mod, punk, metal... re-appropriation of fashions from the past
- DIY culture in full effect
  - Making your own: retrofitting 'made' items to suit your style; supporting shops that do
  - Vintage
  - Customizing your own look; one of a kind, individuality
- Significant move away from big brands



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# technology

- More youth are downloading
  - 83% of young people are downloading files off the Internet, with 85% of those files being Mp3s / music
- DVDs are the new CDs
  - Prices drop and players are common
  - The computer is almost as common as the CD player for music listening (51% vs. 44% as 'primary' choice)
- Increasing ownership of flat screen televisions and wireless routers
  - The plateau for early adopters has been reached, watch for mainstream adoption



# sports

- Active, active, active...
  - Over 70% of young people are biking, swimming or jogging
  - Canadian's are overweight, but less so than Yanks
  - Most popular team sports are basketball and soccer, both over 40% participation
- Value shift
  - Better living through healthy eating and activity
- No hockey so far
  - Gasp!



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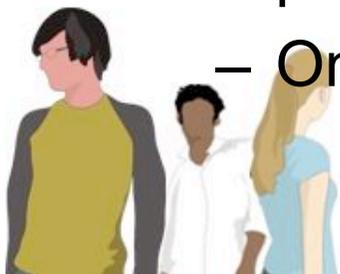


# videogames

- Connectedness
  - MMORPG's are changing the landscape of traditional videogames on all consoles
  - Final Fantasy XI (PS2), Everquest (PC), Hello Kitty World, City of Heroes (Online-based)
  - Voiceover-IP = better player-to-player communication
  - Online clans and communities



Hello Kitty World-MMO-cuteness coming soon!



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# videogames

- Continuity
  - Series gaming (Grand Theft Auto, Halo, Final Fantasy) continues
  - Carry a large, established audience
- Ultra-violence
  - Violence in games reach a new level; Manhunt receives an R rating in Ontario



# food and drink

- Young people wanting healthier options
  - Atkins everything (with 1/3 of young people having tried it)
- Diversity
  - Food and travel programming increasingly popular
  - Food as entertainment
- Rise in prominence of DIY home entertaining, comfort foods and ‘hunker-down-for-evening’ nights



# food and drink

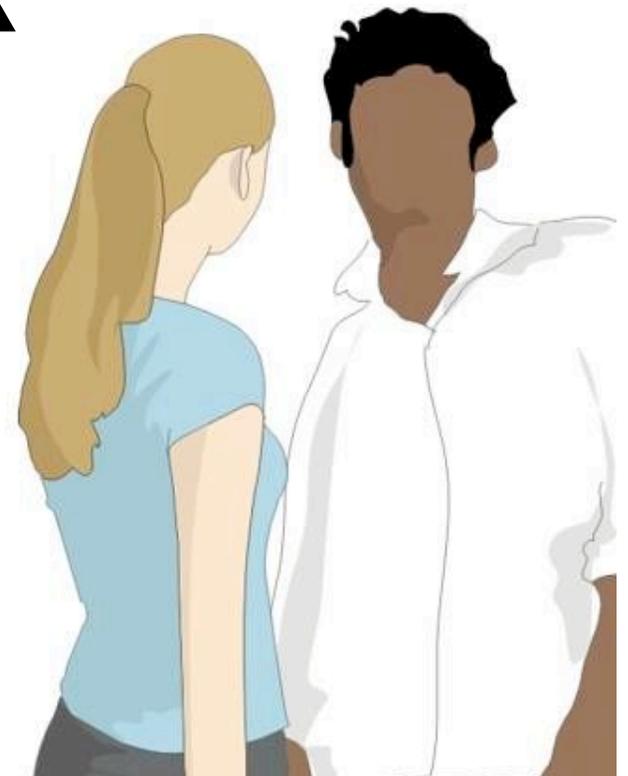
In your mind, which of the following is the quick service ('fast food') restaurant you visit the most?

<b>n = 1143</b>	
<b>Ping National Study (16-29 year olds) / Fall 2003</b>	
<b>Subway</b>	<b>23%</b>
<b>McDonalds</b>	<b>19.2%</b>
<b>Tim Horton's</b>	<b>17.8%</b>
<b>Wendy's</b>	<b>7.6%</b>
<b>A&amp;W</b>	<b>3.8%</b>
<b>Pita Pit / Extreme Pita</b>	<b>3.5%</b>
<b>Burger King</b>	<b>3.3%</b>



# Let's Go to Work

## Hiring and Retaining the New Young Workforce



# let's go to work

- what is work?
  - “Money Jobs”
  - “Careers”
- values shift
- the three workers
- attraction and retention
- case studies



# what is work?

- “Work,” for young Canadians, divides into three neat categories:
  - A job for money and money alone (tweens and teens)
  - A job for money and money alone (young adults who won’t be moving into a career they love)
  - A job for love (or at least like) and money (young adults who have started their careers)



# what is work?

- Huge difference between job for money and jobs as a career: important to recognize those differences
  - “Money” jobs have a lot in common, one sector or industry to another
  - “Career” jobs are driven by a desire to get involved in a particular sector



# what is work?

- “Money” jobs: a means to an end (usually paying for post-secondary education, maybe a car, basic living expenses) until they leave post-secondary
- “Careers”: aspirations are for a “lifelong career” (less and less framed within the context of a single employer or company)
- “Money” and “Careers”: want a diversity of experiences – and while focusing on stability they put increasing emphasis on developing new skills, searching for new knowledge
- Expect to be working at a whole range of jobs
- Many have aspirations for owning own business (a good third want that right away!)



# what is work?

- Even though young workers take jobs “just for the money,” it’s all the things that *aren’t* money that will bring them to you and keep them with you
  - If the money is the same everywhere, and the work is the same everywhere, too, why not move from one job to another based on other criteria?



# values shift



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# values shift

- “no loyalty” generation
- “7 careers in their lifetime” (at least!)  
...and yours might not be a career...
- skills over stability
- think about how to maximize their short-term impact



# what today's young workers value

- flexibility
- fair compensation
- fun atmosphere
- skills over security
- incentives/benefits
- respect



# the three workers



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# the three workers

- in most categories, young people represent three kinds of workers
  - current workers
  - future workers
  - influential workers



# current workers

- working for disposable income (with a bit of a save-to-spend mentality)
- different definition of ‘necessity’
- avoiding big expenditures for more disposable cash
- earlier understanding of how money works
- might have been ‘working’ from a *very* young age



# future workers

- will be connected to your organization for the long-term...
- ...if the experience is a fulfilling one
  - doesn't necessarily mean that they'll *work* for you long-term, though...
- can't bring 'em back until they are older
  - the “one opportunity” syndrome
  - the “this industry sucks” syndrome



# influential workers

- influence on friends to get jobs
  - single biggest influencer, period, is word of mouth from a friend
- youth-to-workplace attitudes and demands are *driving* a lot of adult attitudes and demands
  - flex hours
  - casual attire
  - personality at the front
  - etc.



# attraction and retention



# industry/sector perception

- young people are often *industry-specific*
  - without the benefit of having a defined skill-set that can move across industries, they view themselves as workers tied to a specific industry
  - an accountant can work for an accounting firm – but also as an in-house accountant in a different industry, whereas a waiter works in restaurants, and a retail worker works in retail, period
- this means that the perception of your specific industry or sector (especially when labour is mostly unskilled) is critical in attracting youth



# industry/sector perception

- some industries are simply seen as entry-level (and there is very little that can be done about that)
- service jobs can mean humiliation and mocking from their friends, popular culture
  - “you want fries with that?”
  - “that’s alright, that’s okay, you’re gonna pump our gas someday”



# industry/sector perception

- specific sectors or industries that *aren't* seen as easy to get into need to work harder at this than others
  - where's your on-line job board?
  - are you a low-training decent money sector for youth, or do you offer jobs with potential for advancement and long-term careers?
  - needs to be highlighted separately – the person who is looking to work a few summers on the front lines of service might eventually turn into the person with a Bachelor of Commerce who wants to work for you long-term



# attraction

- attraction starts with the image of the industry or sector, then the image of the particular corporation or organization within the industry
- part of attraction is simply having a presence at the appropriate places, so they can seek you out
  - at post-secondary job fairs
  - in school newspapers
  - on a website that is linked to other decent youth websites
  - with guidance counsellors and school advisors



# attraction

- consider your image – industry and sector first, then the individual organization
  - advertising, to “type” of employees, to uniform
  - comes back to word of mouth
  - high school: leaving work to go out with friends right away – where do you want to be picked up?
  - like getting your parents to drop you off a block from school



# attraction

- highlight...
  - fair pay and *incentives*
  - show you respect their time
  - flexibility (primarily in scheduling)
  - learning opportunities
- create a common on-line job posting board, get it indexed by Google, and start promoting it virally



# how to attract?



## About Us

### Overview

#### Jeff Gaulin, MA (journalism) MBA

Jeff Gaulin is an award-winning journalist, poet, playwright and entrepreneur who graduated from journalism school at the University of Western Ontario in 1995.

He began Jeff Gaulin's Journalism Job Board as an online employment service to help his classmates find work after graduation. In less than five years the service grew from a private e-mail distribution list to a nationwide web site that has drawn the attention of The National Post, BCBusiness magazine and Reader's Digest.

Jeff's media career includes work in television, newspapers, magazines, public relations and government affairs across five provinces. Today, he lives with his wife, son and daughter in Calgary, Alberta where in his spare time he enjoys kayaking, snowboarding and ordering smoked meat from Montreal.

### Section Categories

- ▶ [How to use this site](#)
- ▶ [Prices](#)
- ▶ [Legal](#)
- ▶ [Advertise on JeffGaulin.com](#)

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# retention

- firstly, accept that some of them *can't be retained*
  - this is a transitional lifestage
- also accept that even if you do these things you will still, at some point, *get burned*
  - it's a part of working with young people
- retention, more often than not is based on *flexibility, fairness, and a free education*
  - these things are often promised (either overtly or by omission) in job interviews but, young people feel, rarely get delivered upon



# retention

- flexibility
  - primarily as flexibility in scheduling
  - (appropriate) recognition that while the business may be the most important thing to you, it might only be number three for them
- how?
  - rotate jobs
  - offer as much scheduling flexibility as you can
  - be respectful (or appear to be) of the other things in their lives
  - hire friends and family (often, this is good for you, too)



# retention

- fairness
  - fair pay
  - perception that their place of work is fair compared to what their friends are doing – manage this!
  - being treated “like adults”
- how?
  - *never* say “you’re too young” (even if it’s true)
  - \$\$\$, if you can do it - establish clear pay scales with expectations
  - hire and reward managers with “people skills”
  - communicate frequently – close loops

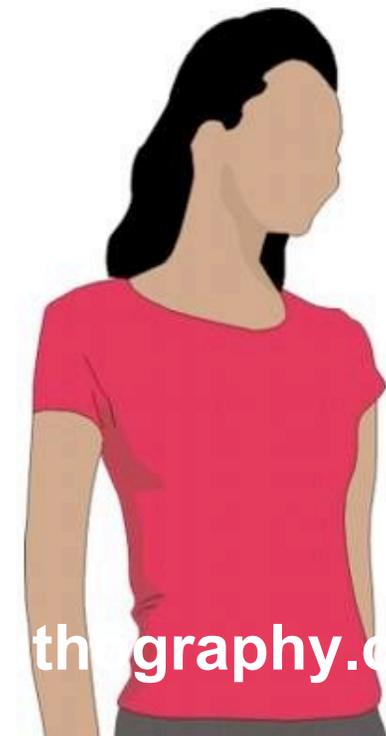


# retention

- free education
  - young people are concerned with skills – acquiring new skills, the right ones to get ahead, etc.
  - reveal to them that they are getting these- help to make them résumé-worthy...
- how?
  - provide whatever training you can, wherever possible
  - pull back the curtain / answer questions
  - promote from within, where possible
  - let them know that they are being trained!



# case studies: who's doing it right?



# starbucks

- trendy upscale image – lots spent on store
- not greasy
- located near public transit / good locations
- long-term career opportunities
- benefits for EVERYONE
  - RRSPs, options, medical / dental
- good corporate citizen
- personality-at-the-front



# starbucks

- line managers have strong people skills
- flexible hours - min 16 hours, input
- everyone receives same training
- incentives – 1lb of coffee/week, all-you-can drink
- reward teamwork



# weber's

- prior to 2000, 7-10 years service
- now, 4-7 years service
- **how?**
  - friends
  - food
  - flexibility
  - fun



# weber's

- **how? (cont'd)**
  - 2 individual meetings/summer/employee
  - 3 well-understood levels
  - strong managers and supervisors --paid well
  - everyone receives training
  - job rotation
  - good location to draw from
- *“Weber’s wouldn’t exist without its staff and its customers” – Paul Weber*



# weber's

- what's changed?
  - “kids don't want 40 hrs/week”
  - “don't know how to clean”
  - “parents more involved”
  - “teambuilding more difficult”



# lessons learned

- things are changing...you're not alone
- perception management is key – for both attraction and retention
- highlight your industry or sector!!!



**Thanks!**  
**Questions?**  
**Comments?**  
**Cocktails?**

