

BEYOND THE WHEEL

Survey Technical Report



Non-driving Occupations in the Trucking Industry

Our mission: to assist the Canadian trucking industry to recruit, train and retain the human resources needed to meet current and long-term requirements.

Canada

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**Canadian Trucking
Human Resources Council**

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1. Introduction

1.1 Overview of Project

1.1.1 Purpose

Much of the information and research compiled by the Canadian Trucking Human Resources Council (CTHRC) has to date focused on the characteristics of the supply and demand of drivers in the industry.

These include several sub-sectors such as:

- For-hire, private, long-haul, medium/short-haul, LTL, etc.
- Drivers as well as driver characteristics (e.g., new entrants, experienced drivers, skill sets, transition from other sectors)
- Other factors (e.g., compensation, licensing requirements, training, economic conditions, freight forecasts, GDP forecasts, etc.)

Driver research is essential to effectively monitor and adjust efforts in the recruitment, training and retention of people in this key occupation. But there are other important industry jobs with supply and demand characteristics we haven't researched. The CTHRC's stated mission is *to assist the Canadian trucking industry to recruit, train and retain the human resources needed to meet current and long-term requirements*. This project helps meet the council's broader mandate by researching non-driving jobs in our industry.

Most people employed in the Canadian trucking industry are drivers (estimates of 80% according to Census 2001) but there are about 60,000 people employed as non-drivers. Jobs range from clerical and labourer jobs to professional positions requiring post-secondary education and considerable experience. This project aims to determine the demand characteristics of these jobs.

The trucking industry will continue to compete with other industries for quality labour. This study will provide important information to help increase awareness in industry, government and labour about the main issues and concerns regarding non-driver employment practices. The increased awareness will allow these groups to collaborate on relevant issues.

1.1.2 Project Components and Phases

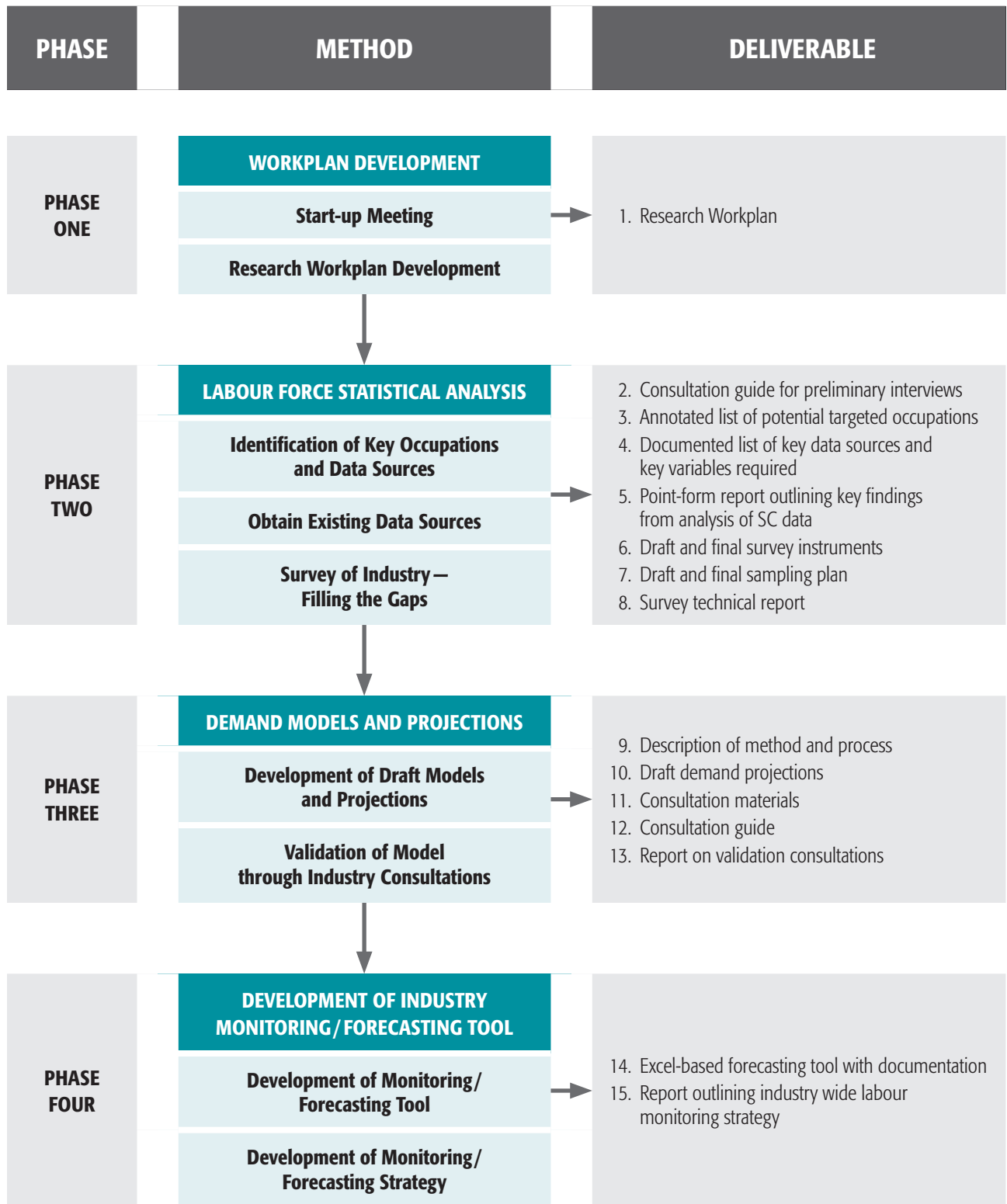
The goal of this study is to create a monitoring/forecasting tool and strategy for the trucking industry in eight key job categories. The tool will be based on a demand model and projections validated by industry members. Various information sources were required to support the demand model including Statistics Canada, GDP projections, and results from a survey of trucking firms.

The following report is an analysis of the surveys completed by trucking firms.

There are four main phases for the project, as illustrated in Figure 1.1:

1. Develop research methods and work plan
2. Select key jobs to include in the survey
3. Develop the demand model and projections and present them to industry members for validation
4. Develop the monitoring/forecasting tool with an accompanying strategy

Figure 1.1: Overview of Project Phases, Methods and Deliverables



Selection of Non-driving Job Categories

A major component of the study was selecting the job categories to be researched. The following is a list of job categories selected:

- **Truck/Transport Mechanic:** inspect, test, diagnose and repair truck and truck-tractor engines and other key operating systems
- **Truck/Trailer Technician:** repair, overhaul, inspect and maintain the suspension, brake and electrical systems on trailers
- **Parts Technician:** responsible for ordering, warehousing, inventory control and sales of parts
- **Shunt Drivers** (licensed): move or “shunt” empty and loaded trailers from the loading docks to and from the yard, sometimes using public roads, streets, etc.
- **Cargo Workers:** dock workers, forklift/tow motor operators
- **Dispatcher:** coordinate loads, pickup and delivery times, drivers and equipment
- **Freight Claims and Safety and Loss Prevention Specialists:** investigate customer claims for damaged or lost freight, monitor and enforce company and regulatory policies linked to safety, loss prevention
- **Foreman/Supervisor/Manager:** supervise and coordinate workers who load and unload trailers, evaluate the needs of customers, manage equipment use, and develop and implement preventative maintenance programs

1.2 Overview of Report

The purpose of the present report is to provide findings from the survey of trucking firms, to develop the demand model and projections. Survey findings will be combined with other information such as Statistics Canada labour force survey data and GDP projections. This report is a working document for the project team and advisors and is not to be made public.

The report consists of seven main sections:

Section 1: introduces the project, phases and methods, and provide an overview of this report

Section 2: outlines methods used to develop, implement and analyze the survey of trucking firms

Section 3: compares the number of drivers in relation to the number of non-drivers

Section 4: contains the key characteristics of the trucking firms that participated in the survey

Section 5: presents survey findings about recruitment and retention issues and outlines challenges and solutions

Section 6: provides survey findings on training opportunities

Section 7: contains survey information about the number of employees who returned to work after they had already retired from non-driving occupations

2. Methodology

This section outlines the methods used to develop, implement and analyze the survey. Topics listed below include survey population and frame, sampling approach, survey instruments, survey implementation, response rate, data coding, cleaning and weighting, and the methodology used to calculate ratios of drivers to non-drivers.

2.1 Survey Population and Frame

2.1.1 Number of Companies and Trucks

A database of trucking companies in Canada obtained from the Canadian Trucking Human Resources Council (CTHRC) was used for the sampling. The number of firms in the CTHRC database was compared to a 2007 Statistics Canada report based on the number of companies and fleet size using the number of road tractors owned and leased as well as those operated by owner-operators. This survey includes only for-hire companies with more than \$1 million in revenue. Therefore only data for companies with 10 or more trucks was compared to the Statistics Canada study. Private companies in the CTHRC data were removed to be comparable to the Statistics Canada data.

A comparison showed the CTHRC sampling (2,148) to be extremely close to the Statistics Canada number (2,260). A comparison of survey methodology showed little deviation. Using this comparison, it was concluded that the CTHRC database provided a good representation of for-hire trucking companies in Canada with \$1 million or more in revenue.

The following tables provide information on the distribution of the CTHRC sampling frame by province and fleet size:

- Table 2.1 provides the number of companies in the CTHRC database by fleet size and province. It also includes the 610 private companies.
- Table 2.2 shows the number of companies expressed as a percentage of the total number of companies sampled:
 - Companies with less than 25 employees accounted for 72% of the companies including 41% of the companies with a fleet size of less than 10
 - Only 28% of the companies had a fleet size of 25 trucks or more and only 14% had a fleet size of 50 or more trucks

In contrast, Tables 2.3 and 2.4 replicate the above tables for the total number of trucks (fleet size) instead of the total number of companies. The findings are almost the opposite of the analysis of the number of trucks:

- 84% of the total trucks were in companies with a fleet size over 25 including 73% that were in companies with a fleet size of 50 or more trucks
- Only 16% were in companies with less than 25 trucks, and less than 5% were in companies with less than 10 trucks

Table 2.1: CTHRC Sampling Frame — Number of Companies

Province	Fleet Size						Total
	2 to 4	5 to 9	10 to 24	25 to 49	50 to 99	100 +	
BC/Terr	100	98	187	66	30	22	503
Alb	75	73	213	84	42	53	540
Sask	63	55	80	26	15	9	248
Man	111	72	107	42	18	20	370
Ont	376	339	586	271	172	142	1,886
Que	276	203	245	139	63	58	984
NS	21	13	30	18	8	8	98
NB	48	23	38	25	11	12	157
Nfld/PEI	9	8	20	6	4	0	47
Canada	1,079	884	1,506	677	363	324	4,833

Table 2.2: CTHRC Sampling Frame — Percent of Total Companies

Province	Fleet Size						Total
	2 to 4	5 to 9	10 to 24	25 to 49	50 to 99	100 +	
BC/Terr	2.1%	2.0%	3.9%	1.4%	0.6%	0.5%	10.4%
Alb	1.6%	1.5%	4.4%	1.7%	0.9%	1.1%	11.2%
Sask	1.3%	1.1%	1.7%	0.5%	0.3%	0.2%	5.1%
Man	2.3%	1.5%	2.2%	0.9%	0.4%	0.4%	7.7%
Ont	7.8%	7.0%	12.1%	5.6%	3.6%	2.9%	39.0%
Que	5.7%	4.2%	5.1%	2.9%	1.3%	1.2%	20.4%
NS	0.4%	0.3%	0.6%	0.4%	0.2%	0.2%	2.0%
NB	1.0%	0.5%	0.8%	0.5%	0.2%	0.2%	3.2%
Nfld/PEI	0.2%	0.2%	0.4%	0.1%	0.1%	0.0%	1.0%
Canada	22.3%	18.3%	31.2%	14.0%	7.5%	6.7%	100.0%

Table 2.3: CTHRC Sampling Frame — Total Number of Trucks by Fleet Size

Province	Fleet Size						Total
	2 to 4	5 to 9	10 to 24	25 to 49	50 to 99	100 +	
BC/Terr	287	638	2,788	2,229	1,930	4,403	12,275
Alb	213	492	3,211	2,833	2,841	15,251	24,841
Sask	181	353	1,174	881	1,030	2,174	5,793
Man	315	480	1,562	1,432	1,132	5,874	10,795
Ont	1,064	2,276	8,741	9,209	11,236	62,141	94,667
Que	750	1,319	3,732	4,790	4,341	22,567	37,499
NS	61	83	468	642	559	2,524	4,337
NB	127	152	580	872	717	5,011	7,459
Nfld/PEI	29	50	299	212	264		854
Canada	3,027	5,843	22,555	23,100	24,050	119,945	198,520

Table 2.4: CTHRC Sampling Frame — Percent Distribution of Trucks by Fleet Size

Province	Fleet Size						Total
	2 to 4	5 to 9	10 to 24	25 to 49	50 to 99	100 +	
BC/Terr	0.1%	0.3%	1.4%	1.1%	1.0%	2.2%	6.2%
Alb	0.1%	0.2%	1.6%	1.4%	1.4%	7.7%	12.5%
Sask	0.1%	0.2%	0.6%	0.4%	0.5%	1.1%	2.9%
Man	0.2%	0.2%	0.8%	0.7%	0.6%	3.0%	5.4%
Ont	0.5%	1.1%	4.4%	4.6%	5.7%	31.3%	47.7%
Que	0.4%	0.7%	1.9%	2.4%	2.2%	11.4%	18.9%
NS	0.0%	0.0%	0.2%	0.3%	0.3%	1.3%	2.2%
NB	0.1%	0.1%	0.3%	0.4%	0.4%	2.5%	3.8%
Nfld/PEI	0.0%	0.0%	0.2%	0.1%	0.1%	0.0%	0.4%
Canada	1.5%	2.9%	11.4%	11.6%	12.1%	60.4%	100.0%

2.1.2 For-Hire vs. Private

The sampling was divided as follows: for hire (4,223) and private (610). None of the private companies surveyed were in the 2–9 vehicle fleet size. There are no reliable statistics on the split between the number of private vs. for-hire companies by fleet size and province. The 2007 Canadian Vehicle Survey shows the split between for-hire/owner-operator trucks and private trucks by vehicle size:

- In trucks between 4.5 and 14.9 tonnes (these are primarily straight trucks and most would not be moving inter-city freight) the number of for-hire/owner-operator vehicles was 118,302, and for private vehicles was 197,218—a split of 38% to 62%, with the majority being private trucks.
- In trucks 15 tonnes and over (mostly tractor-trailers moving intercity freight), the number of for-hire/owner-operator vehicles was 218,903, and for private vehicles it was 64,796—a split of 77% to 23%, with the majority being for-hire/owner-operator trucks. This category is likely closer to the composition of the fleets in the survey and is similar to the proportion of trucks in the for-hire and private companies in our sampling frame. There were 151,586 trucks among the for-hire companies and 46,934 trucks in the private companies—76% vs. 24%. This is almost the same split as the 15 tonnes-plus group noted by the Canadian vehicle survey (77% vs. 23%).

Based on this we concluded the CTHRC database provided a reasonable representation of larger intercity private trucking firms in Canada.

2.2 Sampling Approach

The sampling strategy was based on the following key characteristics of the CTHRC sampling frame:

- Comparison of the CTHRC database to the Statistics Canada data demonstrated that the CTHRC sampling frame provided a good representation of the for-hire companies in the Canadian trucking industry
- The CTHRC database provided a reasonable representation of intercity private trucking firms in Canada
- Larger trucking firms accounted for a majority of the trucks in the industry and, therefore, would also account for a large majority of the drivers and non-driver positions in the industry

Based on this information, a relatively simple sampling strategy was implemented—surveying all larger trucking companies to get an accurate representation of the industry. Since the existing split between for-hire and private firms in the sample appeared to reflect the correct industry proportion, there was no stratification by for-hire vs. private.

Smaller firms were retained for a portion of the sample but the initial survey focused on larger companies (with 10 or more trucks). The rest of the sample was one-third smaller firms (with 2–4 trucks) and two-thirds firms with 5–9 trucks. The goal was to gather reliable data from larger firms, which was essential for the forecasting modeling, while still providing reliable information on the hiring challenges facing smaller firms. Greater weight was given to the larger firms because they account for most industry jobs.

2.3 Development of Survey Instrument

Two versions of the survey were initially developed: one for firms with 10 or more power units in their fleet (medium-large fleet version) and a second for firms with fewer than 10 power units in their fleet (small fleet version).

Each version of the survey was designed to collect information about basic characteristics (e.g., fleet size, number of drivers, type of hauling, etc.), as well as information on the number of employees and the number of vacant non-driving positions including any outsourcing of these jobs. The survey also contained questions on challenges in the recruiting and retention of non-drivers, best recruiting practices and training opportunities.

In addition, we tried to determine how many of these workers had come out of retirement to return to their old jobs.

Initially, the project authority and advisory group reviewed draft versions of the surveys. Their observations were entered in draft versions. The project team recruited a small number of small, medium and large firms to test the two versions of the draft survey. They were asked to complete the questionnaire and participate in a 10–15 minute interview to assess the survey. Surveys were also translated into French and pre-tested to ensure accurate translation.

Halfway through the project it became apparent the surveys were getting a low response rate. Researchers felt respondents didn't participate because the survey was too long. They decided, in conjunction with the project authority, to shorten the survey by including only questions related directly to the model development. Questions regarding challenges, best approaches, training opportunities and so on were removed.

2.4 Survey Implementation

The survey was implemented using three methods: telephone interviews, on-line questionnaires, and a Mail-Out/Mail-Back questionnaire (MOMB). Telephone interviews were conducted using a Computer-Assisted Telephone Interviewing (CATI) system. Online questionnaires were completed through a personal link provided to respondents. MOMB questionnaires were returned in pre-paid, self-addressed envelopes.

All potential respondents received an invitation letter by regular mail from the CTHRC, outlining the purpose of the survey and asking them to complete the survey online. Respondents were sent reminders via email about a week later. Respondents who didn't complete the online survey were phoned a few weeks later and asked to participate. They were also given the options of a phone survey, an online survey or completing a written copy mailed to them with a pre-paid postage envelope. All remaining participants were also sent a hard copy (MOMB) of the questionnaire. More follow-up phone calls were made to encourage respondents to complete the survey. They were also given an option of completing an abbreviated version over the phone.

2.5 Response Rate

The overall survey response rate for the survey was 25.8%. Based on standards used by Statistics Canada and the Marketing Research and Intelligence Association, this was considered a good response rate for a trucking industry survey.

The refusal rate was 27.6%, while 50.7% of potential respondents could not be reached. The primary reason for no contact was due to invalid numbers (18.2% of all numbers called), no answers or potential respondents who were unavailable after 10 or more calls during the time period the survey was conducted (32.5% of all numbers called).

Response outcomes are outlined in Table 2.5.

2.6 Data Coding, Cleaning and Weighting

Researched compiled information from the completed surveys. They coded open-answer questions where applicable and cleaned the survey data, including the identification and removal of outliers. Results were weighted based on Statistics Canada numbers for fleet size by province/territory. Information from private fleets was not weighted because their published distribution of fleet size by province/territory could not be found.

Table 2.5: Response Outcomes

Response Outcome	Overall	
	Frequency	Percent
Total Records Surveyed	4,748	100.0
Completed Questionnaire (key questions answered)	1,004	21.1
Incomplete Questionnaire (key questions not answered)	28	0.6
No Answer/Not Available	1,541	32.5
Refusals	1,311	27.6
Invalids (wrong contact information, duplicates)	864	18.2

2.7 Calculation of Ratios

As indicated, the purpose of the survey was to provide ratios of the numbers of drivers to non-drivers with specific jobs. Information will then be used to develop a model to forecast demand for these occupations based on various assumptions.

The method involved calculating the ratios by taking the total number of drivers sampled (weighted) and dividing it by the total number of positions in the industry for each job category (weighted). This provided ratios reflective of the sample (and to a certain extent the industry) with a larger firm contributing more to the overall ratio than a smaller firm.

In addition, to demonstrate variability, an “average ratio” was calculated for each job category. These are less representative of the industry overall, but allow for a comparison where each firm’s ratio essentially contributes to the overall ratio in a similar way (not dependent on size of fleet).

Where firms outsourced part of the work, the total number of employees in each job category includes both employees and outsourced workers.

3. Ratios of Drivers to Other Employees

This section provides ratios for each of the non-driving jobs selected. Initially, ratios used to develop the model are presented overall, and by key sub-groups (fleet size, private/for-hire, type of hauling).

3.1 Truck/Transport Mechanic

Truck/Transport Mechanic: inspect, test, diagnose and repair truck and truck-tractor engines and other key operating systems

3.1.1 Overall Ratios of Drivers to Mechanics

As illustrated in Table 3.1 below, the overall ratio of drivers to truck/transport mechanics was 8.7 drivers per one mechanic.

All ratios in each category were calculated by totalling the number of drivers, (company drivers, owner-operators, etc.), and dividing it by the total number of people in firms with at least one person in that job category. This ratio is likely the most representative of the industry overall.

Table 3.1: Overall Ratios of Drivers to Mechanics

Dimension	Ratio of Drivers to Mechanics	N
Overall	8.7	496
Fleet Size		
1 to 9 units	5.9	86
10 to 24 units	5.8	146
25 to 50 units	8.8	128
51 to 100 units	9.2	79
101+ units	9.5	57
For-hire vs. Private		
For-hire fleets	9.4	369
Private fleets	7.9	100
Load		
Primarily LTL (75%+ of business)	11.6	36
Not LTL (less than 75% of business)	8.6	432
Length of Hauling		
Primarily long-medium haul (75%+ of business)	9.0	212
Not long-medium haul (less than 75% of business)	8.5	284
Region		
Atlantic	6.5	42
Quebec	9.5	84
Ontario	9.7	190
Manitoba/Saskatchewan	8.9	69
British Columbia/Alberta	7.2	110

The ratio of drivers to mechanics tended to increase as the size of fleet increased. For smaller fleets, the overall ratio was 5.9 drivers to one mechanic, while the largest fleets reported 9.5 drivers to one mechanic.

One possible explanation for this difference in ratios between the largest and smallest fleets could be the age of the fleets. Larger fleets tend to have newer trucks. Ratios of drivers to mechanics were found to be **higher** among:

- The for-hire fleets, when compared to private fleets (9.4 vs. 7.9)
- Primarily less than truckload (LTL) fleets, when compared to fleets having more truckload business (11.6 vs. 8.6)

There were no major differences in the overall ratios of drivers to mechanics according to the different hauling lengths.

The regions of Ontario (9.7), Quebec (9.5), and Manitoba/Saskatchewan (8.9) tended to have higher overall ratios of drivers to mechanics when compared with BC/Alberta (7.2) and the Atlantic provinces (6.5).

3.1.2 Average Ratios of Drivers to Mechanics

As indicated previously, the average ratios, while not that useful for developing the model, provide insight into the number of drivers per mechanic. As illustrated in Table 3.2, the median ratio for the firms with at least one employee filling a mechanic's position (9.0) was similar to the overall ratio (8.7—as seen in Table 3.1). The mean ratio was substantially higher (12.0), indicating there were a few firms which had high ratios of drivers to mechanics compared to the rest of the sample.

Table 3.2: Average Ratios of Drivers to Mechanics

Dimension	Median	Mean	N
Overall	9.0	12.0	496
Fleet Size			
1 to 9 units	8.2	13.6	86
10 to 24 units	7.0	9.5	146
25 to 50 units	10.2	12.6	128
51 to 100 units	12.0	13.3	79
101+ units	10.3	13.9	57
For-hire vs. Private			
For-hire fleets	9.1	12.7	369
Private fleets	6.5	9.3	100
Load			
Primarily LTL (75%+ of business)	10.5	12.1	36
Not LTL (less than 75% of business)	9.0	12.1	432
Length of Hauling			
Primarily long-medium haul (75%+ of business)	9.3	13.0	212
Not long-medium haul (less than 75% of business)	8.0	11.3	284
Region			
Atlantic	5.7	9.8	42
Quebec	9.0	12.6	84
Ontario	9.0	12.0	190
Manitoba/Saskatchewan	10.6	12.4	69
British Columbia/Alberta	7.5	12.1	110

3.2 Truck/Trailer Technician

Truck/Trailer Technician: repair, overhaul, inspect and maintain the suspension, brake and electrical systems on trailers

3.2.1 Overall Ratios of Drivers to Truck/Trailer Technicians

As illustrated in Table 3.3 below, the ratio of drivers to truck/trailer technicians for the survey sample was **11.8 drivers per one truck/trailer technician**. (Firms with no employees in this occupation were excluded because they likely get the service elsewhere. Therefore, the job exists somewhere else in the sector.)

The ratio of drivers to truck/trailer technicians demonstrated a similar pattern to most of the jobs—it tended to increase as the size of fleet increased. For the smaller fleets, the overall ratio was 9.6 drivers to one truck/trailer technician, while the largest fleets reported 12.8 drivers to one truck/trailer technician.

Table 3.3: Overall Ratios of Drivers to Truck/Trailer Technicians

Dimension	Ratio of Drivers to Truck/Trailer Technicians	N
Overall	11.8	295
Fleet Size		
1 to 9 units	9.6	78
10 to 24 units	9.0	92
25 to 50 units	11.9	59
51 to 100 units	11.0	44
101+ units	12.8	23
For-hire vs. Private		
For-hire fleets	12.2	225
Private fleets	11.6	55
Load		
Primarily LTL (75%+ of business)	12.3	15
Not LTL (less than 75% of business)	11.7	269
Length of Hauling		
Primarily long-medium haul (75%+ of business)	11.0	127
Not long-medium haul (less than 75% of business)	12.1	168
Region		
Atlantic	13.5	23
Quebec	12.3	61
Ontario	14.9	97
Manitoba/Saskatchewan	8.3	32
British Columbia/Alberta	8.8	82

Ratios of drivers to truck/trailer technicians were found to be *similar* among:

- The for-hire fleets, when compared with private fleets (12.2 vs. 11.6)
- Primarily LTL fleets, when compared with fleets having more truckload business (12.3 vs. 11.7)
- Different hauling lengths (11.0 vs. 12.1)

Ontario (14.9), the Atlantic provinces (13.5) and Quebec (12.3) tended to have a higher overall ratios of drivers to truck/trailer technicians when compared to BC/Alberta (8.8) and Manitoba/Saskatchewan (8.3).

3.2.2 Average Ratios of Drivers to Truck/Trailer Technicians

As illustrated in Table 3.4, the median ratio for the firms with at least one employee filling a truck/trailer technician's position was slightly higher (14.2) to that found for the overall ratio (11.8—as seen in Table 3.3). The mean ratio was higher still (17.9), indicating there were a few firms which had quite high ratios of drivers to truck/trailer technicians when compared to the rest of the sample.

Table 3.4: Average Ratios of Drivers to Truck/Trailer Technicians

Dimension	Median	Mean	N
Overall	14.2	17.9	295
Fleet Size			
1 to 9 units	15.0	18.1	78
10 to 24 units	11.0	15.0	92
25 to 50 units	15.0	20.0	59
51 to 100 units	18.3	20.2	44
101+ units	15.2	19.8	23
For-hire vs. Private			
For-hire fleets	15.2	19.0	225
Private fleets	11.3	15.0	55
Load			
Primarily LTL (75%+ of business)	11.1	14.8	15
Not LTL (less than 75% of business)	14.0	18.1	269
Length of Hauling			
Primarily long-medium haul (75%+ of business)	15.0	18.6	127
Not long-medium haul (less than 75% of business)	13.8	17.5	168
Region			
Atlantic	18.3	19.2	23
Quebec	13.0	16.8	61
Ontario	15.0	19.8	97
Manitoba/Saskatchewan	11.0	15.9	32
British Columbia/Alberta	12.3	17.0	82

3.3 Parts Technician

Parts Technician: responsible for ordering, warehousing, inventory control and sales of parts

3.3.1 Overall Ratios of Drivers to Parts Technician

As illustrated in Table 3.5 below, the overall ratio of drivers to parts technicians was **30.4 drivers per one parts technician**.

The ratio of drivers to parts technicians tended to increase as the size of fleet increased. For the smaller fleets, the overall ratio was 12.9 drivers to one parts technician, while the largest fleets reported 53.8 drivers to one parts technician.

Table 3.5: Overall Ratios of Drivers to Parts Technician

Dimension	Ratio of Drivers to Parts Technician	N
Overall	30.4	261
Fleet Size		
1 to 9 units	12.9	80
10 to 24 units	14.6	66
25 to 50 units	21.3	51
51 to 100 units	38.3	44
101+ units	53.8	20
For-hire vs. Private		
For-hire fleets	30.7	201
Private fleets	33.4	44
Load		
Primarily LTL (75%+ of business)	45.3	17
Not LTL (less than 75% of business)	28.9	236
Length of Hauling		
Primarily long-medium haul (75%+ of business)	28.3	107
Not long-medium haul (less than 75% of business)	31.7	154
Region		
Atlantic	38.1	18
Quebec	31.3	48
Ontario	27.6	86
Manitoba/Saskatchewan	29.5	29
British Columbia/Alberta	32.1	80

Ratios of drivers to parts technicians were found to be **higher** among:

- Primarily LTL fleets when compared with fleets having more truckload business (45.3 vs. 28.9)¹

Ratios of drivers to parts technicians were found to be **similar** among:

- Different hauling lengths (28.3 vs. 31.7)
- For-hire compared with private fleets (30.7 vs. 33.4)

¹ This comparison should be interpreted with caution given the small number of fleets that were primarily LTL (n=17).

The Atlantic provinces tended to have higher overall ratios of drivers to parts technicians (38.1) when compared with the other regions.

3.3.2 Average Ratios of Drivers to Parts Technician

As illustrated in Table 3.6, the median ratio for the firms with at least one employee filling a parts technician's position was slightly lower (23.0) to that found for the overall ratio (30.4—as seen in Table 3.5). The mean ratio was higher (35.3) indicating there were a few firms which had quite high ratios of drivers to parts technicians, particularly among the larger firms.

Table 3.6: Average Ratios of Drivers to Parts Technician

Dimension	Median	Mean	N
Overall	23.0	35.3	261
Fleet Size			
1 to 9 units	15.0	20.0	80
10 to 24 units	18.1	24.8	66
25 to 50 units	31.9	30.8	51
51 to 100 units	58.7	59.3	44
101+ units	87.9	90.3	20
For-hire vs. Private			
For-hire fleets	24.0	36.3	201
Private fleets	24.8	36.8	44
Load			
Primarily LTL (75%+ of business)	33.1	50.3	17
Not LTL (less than 75% of business)	23.0	34.0	236
Length of Hauling			
Primarily long-medium haul (75%+ of business)	23.3	35.5	107
Not long-medium haul (less than 75% of business)	23.0	35.2	154
Region			
Atlantic	29.3	45.1	18
Quebec	27.5	39.6	48
Ontario	27.5	37.1	86
Manitoba/Saskatchewan	21.0	35.8	29
British Columbia/Alberta	18.4	28.5	80

3.4 Shunt Driver

Shunt Drivers (licensed): move or “shunt” empty and loaded trailers from the loading docks to and from the yard, sometimes using public roads, streets, etc.

3.4.1 Overall Ratios of Drivers to Shunt Drivers

As illustrated in Table 3.7 below, the overall ratio of drivers to shunt drivers (licensed) was **16.9 drivers per one shunt driver**.

The ratio of drivers to shunt drivers tended to be lowest (14.0 and below) among the firms under 50 power units and then increased (19.3 to 22.0) among the larger firms.

Table 3.7: Overall Ratios of Drivers to Shunt Drivers

Dimension	Ratio of Drivers to Shunt Drivers	N
Overall	16.9	239
Fleet Size		
1 to 9 units	14.0	83
10 to 24 units	10.1	49
25 to 50 units	12.8	53
51 to 100 units	22.0	34
101+ units	19.3	21
For-hire vs. Private		
For-hire fleets	16.9	186
Private fleets	16.8	39
Load		
Primarily LTL (75%+ of business)	20.0	25
Not LTL (less than 75% of business)	16.1	209
Length of Hauling		
Primarily long-medium haul (75%+ of business)	16.3	120
Not long-medium haul (less than 75% of business)	17.2	119
Region		
Atlantic	32.1	19
Quebec	17.0	37
Ontario	15.8	86
Manitoba/Saskatchewan	13.3	25
British Columbia/Alberta	15.1	71

Ratios of drivers to shunt drivers were found to be **higher** among:

- Primarily LTL fleets when compared with fleets having more truckload business (20.0 vs. 16.1)

Ratios of drivers to shunt drivers were found to be **similar** among:

- Different hauling lengths (16.3 vs. 17.2)
- For-hire compared with private fleets (16.8 vs. 16.9)

The Atlantic provinces tended to have higher overall ratios of drivers to shunt drivers (32.1) when compared with the other regions.

3.4.2 Average Ratios of Drivers to Shunt Drivers

As illustrated in Table 3.8, the median ratio for the firms with at least one employee filling a shunt driver's position was slightly higher (20.0) than that found for the overall ratio (16.9—as seen in Table 3.7). The mean ratio was higher still (25.5), indicating there were a few firms with high ratios of drivers to shunt drivers when compared to the rest of the sample.

Table 3.8: Average Ratios of Drivers to Shunt Drivers

Dimension	Median	Mean	N
Overall	20.0	25.5	239
Fleet Size			
1 to 9 units	16.0	21.5	83
10 to 24 units	15.3	22.2	49
25 to 50 units	19.5	23.6	53
51 to 100 units	35.0	36.4	34
101+ units	26.4	36.8	21
For-hire vs. Private			
For-hire fleets	20.3	26.3	186
Private fleets	17.7	23.7	39
Load			
Primarily LTL (75%+ of business)	15.4	24.9	25
Not LTL (less than 75% of business)	20.3	25.7	209
Length of Hauling			
Primarily long-medium haul (75%+ of business)	20.0	25.1	120
Not long-medium haul (less than 75% of business)	20.0	26.0	119
Region			
Atlantic	25.5	30.7	19
Quebec	20.3	27.5	37
Ontario	19.0	23.9	86
Manitoba/Saskatchewan	17.0	22.0	25
British Columbia/Alberta	24.7	26.6	71

3.5 Cargo Worker

Cargo Workers: dock workers, forklift/tow motor operators

3.5.1 Overall Ratios of Drivers to Cargo Workers

As illustrated in Table 3.9 below, the overall ratio of drivers to cargo workers was **7.0 drivers per one cargo worker**.

The ratio of drivers to cargo workers was relatively similar (ranging from 5.2 to 7.7) across the different sizes of firms.

Ratios of drivers to cargo workers were found to be **lowest** among:

- Primarily LTL fleets when compared with fleets having more truckload business (4.1 vs. 9.0)

Table 3.9: Overall Ratios of Drivers to Cargo Workers

Dimension	Ratio of Drivers to Cargo Workers	N
Overall	7.0	180
Fleet Size		
1 to 9 units	6.4	40
10 to 24 units	5.2	54
25 to 50 units	6.3	43
51 to 100 units	6.1	24
101+ units	7.7	20
For-hire vs. Private		
For-hire fleets	7.4	125
Private fleets	6.6	40
Load		
Primarily LTL (75%+ of business)	4.1	37
Not LTL (less than 75% of business)	9.0	138
Length of Hauling		
Primarily long-medium haul (75%+ of business)	11.2	84
Not long-medium haul (less than 75% of business)	5.6	96
Region		
Atlantic	3.4	9
Quebec	8.1	28
Ontario	7.4	70
Manitoba/Saskatchewan	8.4	19
British Columbia/Alberta	7.4	55

- Those fleets that had a greater focus on short and local hauling when compared with those who had most of their business in medium-long hauling (5.6 vs. 11.2)

Ratios of drivers to cargo workers were found to be **similar** among:

- For-hire fleets compared with private fleets (7.4 vs. 6.6).

The Atlantic provinces tended to have lower overall ratios of drivers to cargo workers (3.4) when compared with the other regions.²

² Note: this comparison should be interpreted with caution given the small number of fleets that were from the Atlantic provinces for this question (n=9).

3.5.2 Average Ratios of Drivers to Cargo Workers

As illustrated in Table 3.10, the median ratio for the firms with at least one employee filling a cargo worker's position was slightly higher (9.0) to that found for the overall ratio (7.0—as seen in Table 3.9). The mean ratio was higher still (15.6), indicating there were a few firms which had quite high ratios of drivers to cargo workers when compared to the rest of the sample.

Table 3.10: Average Ratios of Drivers to Cargo Workers

Dimension	Median	Mean	N
Overall	9.0	15.6	180
Fleet Size			
1 to 9 units	8.7	12.4	40
10 to 24 units	6.5	10.5	54
25 to 50 units	15.0	19.1	43
51 to 100 units	17.0	22.9	24
101+ units	8.6	19.3	20
For-hire vs. Private			
For-hire fleets	12.0	18.2	125
Private fleets	7.1	10.8	40
Load			
Primarily LTL (75%+ of business)	7.0	11.4	37
Not LTL (less than 75% of business)	9.9	16.6	138
Length of Hauling			
Primarily long-medium haul (75%+ of business)	14.3	19.3	84
Not long-medium haul (less than 75% of business)	6.8	12.4	96
Region			
Atlantic	16.0	12.3	9
Quebec	8.0	15.6	28
Ontario	9.0	14.8	70
Manitoba/Saskatchewan	20.0	24.0	19
British Columbia/Alberta	8.7	14.3	55

3.6 Dispatcher

Dispatcher: coordinating loads, pick-up and delivery times, drivers and equipment

3.6.1 Overall Ratios of Drivers to Dispatcher

As illustrated in Table 3.11 below, the overall ratio of drivers to dispatchers was **13.5 drivers per one dispatcher**.

The ratio of drivers to dispatchers tended to increase with the number of power units that a firm reported. The smallest firms indicated a ratio of 6.6 in comparison with the largest firms reporting a ratio of 16.1 drivers for each dispatcher.

Table 3.11: Overall Ratios of Drivers to Dispatcher

Dimension	Ratio of Drivers to Dispatcher	N
Overall	13.5	727
Fleet Size		
1 to 9 units	6.6	234
10 to 24 units	9.6	238
25 to 50 units	12.9	128
51 to 100 units	15.8	85
101+ units	16.1	42
For-hire vs. Private		
For-hire fleets	13.2	541
Private fleets	14.6	136
Load		
Primarily LTL (75%+ of business)	12.9	62
Not LTL (less than 75% of business)	13.7	624
Length of Hauling		
Primarily long-medium haul (75%+ of business)	12.8	354
Not long-medium haul (less than 75% of business)	13.9	373
Region		
Atlantic	13.2	45
Quebec	14.9	105
Ontario	13.5	276
Manitoba/Saskatchewan	14.9	64
British Columbia/Alberta	12.6	237

Ratios of drivers to dispatchers were found to be **similar** among:

- For-hire fleets compared with private fleets (13.2 vs. 14.6)
- Primarily LTL fleets when compared with fleets having more truckload business (12.9 vs. 13.7)
- Those fleets that had a greater focus on short and local hauling when compared with those which had most of their business in medium-long hauling (12.8 vs. 13.9)

The ratios were relatively similar across regions as well, ranging from 12.6 to 14.9.

3.6.2 Average Ratios of Drivers to Dispatcher

As indicated previously, the average ratios, while not that useful for developing the model, provide insight into the variability across trucking firms with respect to the number of drivers per dispatcher. As illustrated in Table 3.12, the median ratio for the firms with at least one employee filling a dispatcher's position was slightly lower (11.3) to that found for the overall ratio (13.5—as seen in Table 3.11). The mean ratio was quite similar to the overall ratio (13.2).

Table 3.12: Average Ratios of Drivers to Dispatcher

Dimension	Median	Mean	N
Overall	11.3	13.2	727
Fleet Size			
1 to 9 units	7.0	10.3	234
10 to 24 units	10.0	12.0	238
25 to 50 units	13.3	14.8	128
51 to 100 units	18.8	19.5	85
101+ units	16.9	18.6	42
For-hire vs. Private			
For-hire fleets	12.0	13.5	541
Private fleets	11.0	12.7	136
Load			
Primarily LTL (75%+ of business)	9.6	11.7	62
Not LTL (less than 75% of business)	11.7	13.4	624
Length of Hauling			
Primarily long-medium haul (75%+ of business)	10.5	12.7	354
Not long-medium haul (less than 75% of business)	11.7	13.7	373
Region			
Atlantic	12.0	13.2	45
Quebec	13.0	14.6	105
Ontario	11.0	12.9	276
Manitoba/Saskatchewan	12.0	15.1	64
British Columbia/Alberta	10.0	12.4	237

3.7 Freight Claims and Safety and Loss Prevention Specialist

Freight Claims and Safety and Loss Prevention Specialists: investigating customer claims for damaged or lost freight, monitoring and enforcing company and regulatory policies linked to safety, loss prevention

3.7.1 Overall Ratios of Drivers to Freight Claims and Safety and Loss Prevention Specialists

As illustrated in Table 3.13 below, the overall ratio of drivers to freight claims and safety and loss prevention specialists was **31.1 drivers per one freight claims and safety and loss prevention specialist**.

The ratio of drivers to freight claims and safety and loss prevention specialists tended to increase substantially with the number of power units a firm reported. The smallest firms indicated a ratio of 9.3 compared to the largest firms reporting a ratio of 57.6 drivers for each freight claim and safety and loss prevention specialist.

Table 3.13: Overall Ratios of Drivers to Freight Claims and Safety and Loss Prevention Specialist

Dimension	Ratio of Drivers to Freight Claims and Safety and Loss Prevention Specialist	N
Overall	31.1	533
Fleet Size		
1 to 9 units	9.3	159
10 to 24 units	13.6	170
25 to 50 units	28.5	102
51 to 100 units	51.5	72
101+ units	57.6	30
For-hire vs. Private		
For-hire fleets	30.3	415
Private fleets	34.4	88
Load		
Primarily LTL (75%+ of business)	31.6	55
Not LTL (less than 75% of business)	30.6	451
Length of Hauling		
Primarily long-medium haul (75%+ of business)	28.3	264
Not long-medium haul (less than 75% of business)	32.8	269
Region		
Atlantic	35.7	40
Quebec	36.5	66
Ontario	32.1	193
Manitoba/Saskatchewan	32.4	51
British Columbia/Alberta	26.5	183

Ratios of drivers to freight claims and safety and loss prevention specialists were found to be *similar* among:

- For-hire fleets compared to private fleets (30.3 vs. 34.4)
- Primarily LTL fleets when compared with fleets having more truckload business (31.6 vs. 30.6)
- Those fleets that had a greater focus on short and local hauling when compared with those that had most of their business in medium-long hauling (28.3 vs. 32.8)

The ratios were relatively similar across regions as well, ranging from 26.5 to 36.5.

3.7.2 Average Ratios of Drivers to Freight Claims and Safety and Loss Prevention Specialist

As illustrated in Table 3.14, the median ratio for the firms with at least one employee filling a freight claims and safety and loss prevention specialist position was somewhat lower (20.0) to that found for the overall ratio (31.1 — as seen in Table 3.13). The mean ratio was quite similar to the overall ratio (28.9).

Table 3.14: Average Ratios of Drivers to Freight Claims and Safety and Loss Prevention Specialist

Dimension	Median	Mean	N
Overall	20.0	28.9	533
Fleet Size			
1 to 9 units	11.1	14.0	159
10 to 24 units	14.0	19.1	170
25 to 50 units	31.0	34.9	102
51 to 100 units	57.7	60.0	72
101+ units	62.0	68.4	30
For-hire vs. Private			
For-hire fleets	20.0	29.1	415
Private fleets	21.5	28.7	88
Load			
Primarily LTL (75%+ of business)	20.0	25.7	55
Not LTL (less than 75% of business)	20.0	29.1	451
Length of Hauling			
Primarily long-medium haul (75%+ of business)	18.0	28.2	264
Not long-medium haul (less than 75% of business)	21.0	29.6	269
Region			
Atlantic	21.6	33.8	40
Quebec	29.1	38.6	66
Ontario	20.0	29.3	193
Manitoba/Saskatchewan	26.9	36.6	51
British Columbia/Alberta	16.0	21.8	183

3.8 Foreman / Supervisor / Manager

Foreman / Supervisor / Manager: supervising and coordinating the people who have to load and unload trailers, evaluating the needs of customers, making decisions about the types of equipment required to meet these needs, developing and putting in place preventative maintenance programs, making sure that the equipment is available when called upon

3.8.1 Overall Ratios of Drivers to Foreman / Supervisor / Manager

As illustrated in Table 3.15 below, the overall ratio of drivers to foremen, supervisors and managers was **14.2 drivers per one foreman, supervisor or manager**.

The ratio of drivers to foremen/supervisors/managers tended to increase with the number of power units that a firm reported. The smallest firms indicated a ratio of 8.1 in comparison with the largest firms reporting a ratio of 16.0 drivers for each foreman/supervisor/manager.

Table 3.15: Overall Ratios of Drivers to Foreman / Supervisor / Manager

Dimension	Ratio of Drivers to Foreman/Supervisor/Manager	N
Overall	14.2	629
Fleet Size		
1 to 9 units	8.1	202
10 to 24 units	9.4	205
25 to 50 units	14.5	112
51 to 100 units	17.6	77
101+ units	16.0	33
For-hire vs. Private		
For-hire fleets	15.8	465
Private fleets	12.4	125
Load		
Primarily LTL (75%+ of business)	12.1	56
Not LTL (less than 75% of business)	9.0	535
Length of Hauling		
Primarily long-medium haul (75%+ of business)	16.4	288
Not long-medium haul (less than 75% of business)	13.3	341
Region		
Atlantic	14.1	40
Quebec	23.0	80
Ontario	15.5	237
Manitoba/Saskatchewan	16.5	57
British Columbia/Alberta	10.5	214

Ratios of drivers to foreman/supervisor/manager were found to be **higher** among:

- for-hire fleets compared with private fleets (15.8 vs. 12.4)
- primarily LTL fleets when compared with fleets having more truckload business (12.1 vs. 9.0)
- those fleets that had a greater focus on short and local hauling when compared with those that had most of their business in medium-long hauling (16.4 vs. 13.3).

The ratios were relatively higher in Quebec (23.0) compared to other regions.

3.8.2 Average Ratios of Drivers to Foreman/Supervisor/Manager

As illustrated in Table 3.16, the median ratio for the firms with at least one employee filling a foreman/supervisor/manager position was slightly lower (12.2) to that found for the overall ratio (14.2—as seen in Table 3.15). The mean ratio was slightly higher than the overall ratio (16.9).

Table 3.16: Average Ratios of Drivers to Foreman/Supervisor/Manager

Dimension	Median	Mean	N
Overall	12.2	16.9	629
Fleet Size			
1 to 9 units	8.5	12.1	202
10 to 24 units	11.0	13.5	205
25 to 50 units	18.9	21.9	112
51 to 100 units	24.0	27.5	77
101+ units	24.4	26.5	33
For-hire vs. Private			
For-hire fleets	13.0	17.9	465
Private fleets	10.0	14.3	125
Load			
Primarily LTL (75%+ of business)	10.0	15.9	56
Not LTL (less than 75% of business)	12.5	16.9	535
Length of Hauling			
Primarily long-medium haul (75%+ of business)	14.4	18.3	288
Not long-medium haul (less than 75% of business)	10.3	15.8	341
Region			
Atlantic	12.1	15.7	40
Quebec	19.9	21.8	80
Ontario	13.0	17.1	237
Manitoba/Saskatchewan	15.4	20.8	57
British Columbia/Alberta	10.0	14.2	214

4. Overview of Respondents

This section provides a brief overview of the firms that participated in the survey. It outlines the types and location of firms, fleet characteristics, and type of hauling.

4.1 Type and Location of Firm

4.1.1 Private vs. For-Hire

- 78.7% were for-hire carriers—those that haul another company’s freight
- 17.9% were private firms that carry their own freight
- 5.3% were neither exclusively for-hire nor private carriers

4.1.2 Head Office Location

Table 4.2 provides the distribution of respondents according to the location of their head office in Canada. The largest proportion of respondents had their head office in Ontario (38.0%), followed by Alberta (18.5%) and Quebec (16.7%).

Table 4.1: Distribution According to Type of Fleet

Category	Frequency	Percent
For-hire carrier—a carrier that hauls other’s freight	718	76.7
Private carrier—a carrier that only hauls its own freight	168	17.9
Other (please specify)	50	5.3
Total	936	100.0

Table 4.2: Distribution According to Head Office Location

Province	Frequency	Percent
Alberta	177	18.5
British Columbia	104	10.9
Manitoba	48	5.0
New Brunswick	29	3.0
Newfoundland	6	0.7
Northwest Territories	1	0.1
Nova Scotia	21	2.2
Ontario	363	38.0
Prince Edward Island	5	0.5
Quebec	160	16.7
Saskatchewan	42	4.4
Total	955	100.0

4.1.3 Regions of Operation

As illustrated in Table 4.3, the majority reported their fleets operate in Ontario (63.4%) and the United States (53.1%). Large numbers also operate in Alberta (49.9%), Quebec (46.6%), British Columbia (42.0%), Saskatchewan (41.4%) and Manitoba (39%).

4.2 Fleet Characteristics

4.2.1 Number of Power Units

Slightly over one-third of firms (36.4%) indicated that they have less than 10 power units in their fleet (tractors and straight trucks combined). A similar proportion (33.0%) reported a fleet size between 10 and 25 power units. Smaller proportions reported larger fleet sizes of 25 to 50 power units (14.9%), 51 to 100 power units (9.9%), and more than 100 units (5.8%).

Table 4.3: Distribution According to Regions Where Fleet Operates

Region	Frequency	Percent
Ontario	605	63.4
United States	507	53.1
Alberta	476	49.9
Quebec	445	46.6
British Columbia	401	42.0
Saskatchewan	395	41.4
Manitoba	372	39.0
New Brunswick	237	24.9
Nova Scotia	218	22.9
Prince Edward Island	168	17.6
Newfoundland and Labrador	154	16.2
Northern territories (Yukon/NWT/Nunavut)	105	11.0
Total	954	100.0

* multiple responses possible

Table 4.4: Distribution According to Number of Power Units

Category	Frequency	Percent
1 to 9 units	330	36.4
10 to 24 units	299	33.0
25 to 50 units	135	14.9
51 to 100 units	90	9.9
101+ units	52	5.8
Total	906	100.0

4.2.2 Age of Fleet

As illustrated in Table 4.5, about two-thirds of the fleets report the average age of their fleet is under 5 years. Nearly one-half (48.3%) indicate that the average age is between 3 to 5 years.

4.3 Type of Hauling

4.3.1 Length of Haul

The respondents were evenly split on long- and medium-haul characteristics. Slightly more than one-half (54.3%) reported that less than 75% of their business was long or medium hauls.

4.3.2 Truck Load

As illustrated in Table 4.7, there was only a small proportion of the sample (10.7%) which reported that LTL strongly characterized their firm (75% or more of their business).

4.3.3 Trailer Types

About one-third of the participating firms (34.8%) reported they haul dry van trailers. Other common trailers included flatbed/machinery (17.4%), temperature-controlled units (16.5%), and flatdeck (16.5%).

Table 4.5: Distribution According to Average Age of Fleet

Category	Frequency	Percent
Less than 3 years	155	16.5
Between 3 to 5 years	454	48.3
Between 5 to 7 years	179	19.1
Greater than 7 years	151	16.1
Total	939	100.0

Table 4.6: Distribution According to Length of Haul

Category	Frequency	Percent
Not long-medium haul (less than 75%)	486	54.3
Primarily long-medium haul (75%+)	409	45.7
Total	894	100.0

Table 4.7: Distribution According to Truckload

Category	Frequency	Percent
Not LTL (less than 75% of business)	796	89.3
Primarily LTL (75%+ of business)	95	10.7
Total	891	100.0

Table 4.8: Distribution According to Types of Trailers Hauled

Category	Frequency	Percent
Dry van (includes household goods)	321	34.8
Flatbed/machinery	161	17.4
Temperature controlled units	153	16.5
Flatdeck	153	16.5
Liquid bulk	134	14.5
Dry bulk	93	10.1
Containers	78	8.4
Low-bed	78	8.4
Automobile carriers	26	2.8
Total	925	100.0

* multiple responses possible

5. Recruitment and Retention

A group of respondents were surveyed about the challenges they had experienced in recruiting and retaining non-drivers. They were also asked to describe best practices in recruiting for these jobs.

5.1 Recruitment and Retention Challenges

An overview of the percentage of respondents who felt recruitment and retention was moderately to extremely challenging is shown in Figure 5. The percentages calculated for each occupation reflect the opinions of firms that had at least one person performing some of the responsibilities of the related jobs.

5.1.1 Truck/Transport Mechanic

As illustrated in Figure 5.1, approximately two-thirds (67.5%) of respondents found it moderately to extremely challenging to recruit and retain mechanics. The most frequently cited reasons were not enough people being trained as mechanics (44.8%), and trucking firms' inability to pay high enough wages for mechanics (30.8%—see Table 5.1).

Figure 5: Most Challenging Jobs to Recruit and Retain

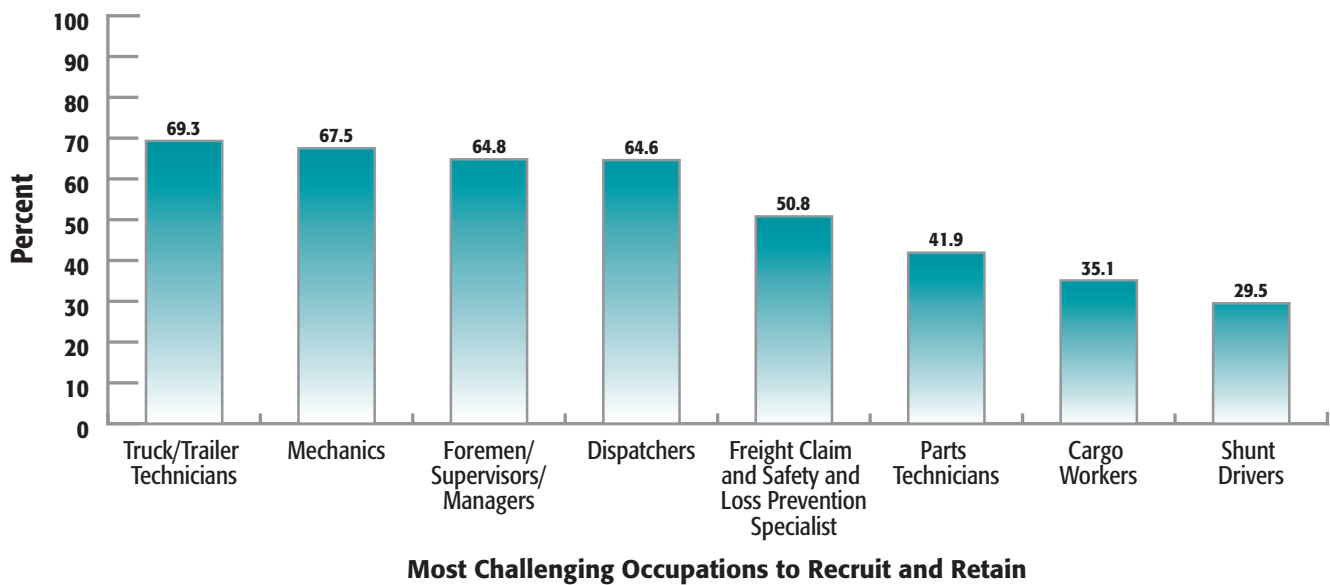


Figure 5.1: Level of Challenge to Recruit and Retain Mechanics (n=240)



Table 5.1: Top Reasons for Challenges to Recruit and Retain Mechanics

Challenges	Frequency	Percent
Not enough people are being trained	78	44.8
Not able to pay high enough wages	54	30.8
Too much competition within the trucking industry	50	28.8
Too much competition from other sectors outside trucking	26	15.2
Retirements	10	5.5

* multiple responses possible

5.1.2 Truck/Trailer Technician

Slightly over two-thirds of respondents (69.4%) reported they found it moderately to extremely challenging to recruit truck/trailer technicians (Figure 5.2). As illustrated in Table 5.2, the most frequently cited reasons for these

challenges include not enough people being trained as technicians (50.0%), and too much competition in the trucking industry for these positions (32.6%).

Figure 5.2: Level of Challenge to Recruit and Retain Truck/Trailer Technicians (n=140)

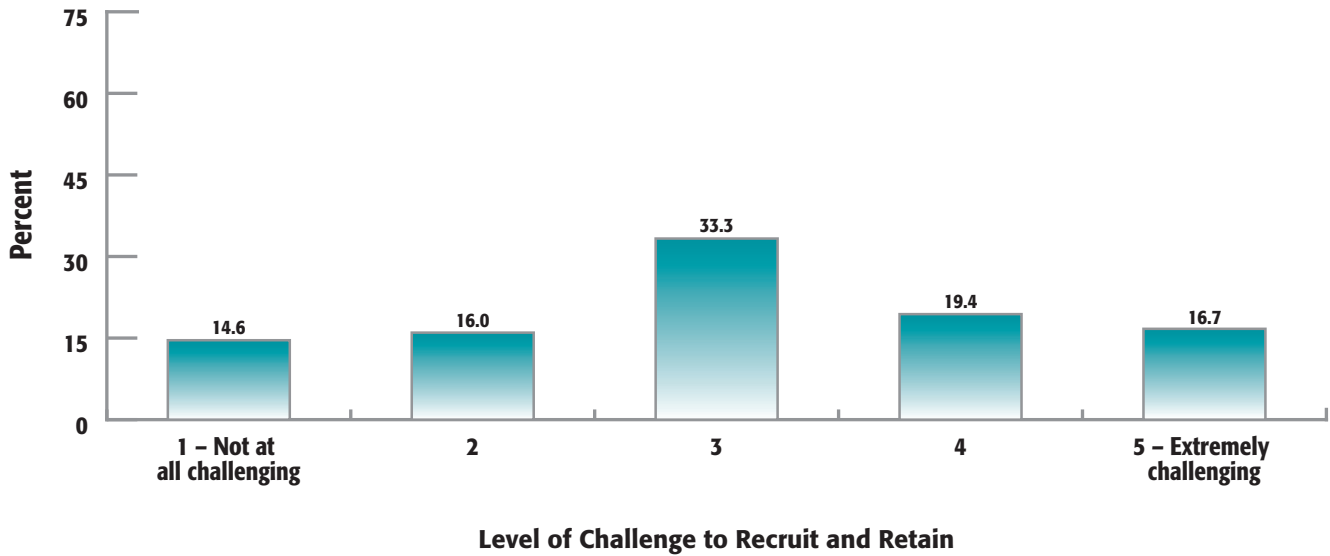


Table 5.2: Top Reasons for Challenges to Recruit and Retain Truck/Trailer Technicians

Challenges	Frequency	Percent
Not enough people are being trained	64	50.1
Too much competition within the trucking industry	42	32.6
Not able to pay high enough wages	35	27.7
Too much competition from other sectors outside trucking	24	18.9
Retirements	1	1.1

* multiple responses possible

5.1.3 Parts Technician

As illustrated in Figure 5.3, fewer than one-half of respondents (41.8%) indicated they found it moderately to extremely challenging to recruit and retain parts technicians. Approximately one-third (31.0%) reported it was not at all challenging. For those who found it

challenging, the most frequently cited reasons included not enough people being trained as parts technicians (26.5%), and trucking firms not being able to pay high enough wages (20.5%). See Table 5.3.

Figure 5.3: Level of Challenge to Recruit and Retain Parts Technicians (n=99)



Table 5.3: Top Reasons for Challenges to Recruit and Retain Parts Technicians

Challenges	Frequency	Percent
Not enough people are being trained	22	26.5
Not able to pay high enough wages	17	20.5
Too much competition within the trucking industry	13	16.0
Too much competition from other sectors outside trucking	8	9.7
Retirements	1	1.7

* multiple responses possible

5.1.4 Shunt Driver

Slightly over one-quarter of respondents (29.5%) reported they find it moderately to extremely challenging to recruit and retain shunt drivers (Figure 5.4). Approximately 40% of respondents reported they did not find it at all challenging. The most commonly cited reasons for these challenges

included too much competition within the industry in recruiting for these positions (25.5%), and the challenges trucking firms have to pay high enough wages to attract and retain shunt drivers (20.4%—see Table 5.4).

Figure 5.4: Level of Challenge to Recruit and Retain Shunt Drivers (n=99)



Table 5.4: Top Reasons for Challenges to Recruit and Retain Shunt Drivers

Challenges	Frequency	Percent
Too much competition within the trucking industry	19	25.5
Not able to pay high enough wages	15	20.4
Not enough people are being trained	9	11.9
Too much competition from other sectors outside trucking	7	9.8

* multiple responses possible

5.1.5 Cargo Worker

As illustrated in Figure 5.5, slightly more than one-third (35.1%) of respondents indicated they found it moderately to extremely challenging to recruit and

retain cargo workers. The most frequently cited reason (36.0%) was that trucking firms were not able to pay enough to attract and retain cargo workers (Table 5.5).

Figure 5.5: Level of Challenge to Recruit and Retain Cargo Workers (n=101)



Table 5.5: Top Reasons for Challenges to Recruit and Retain Cargo Workers

Challenges	Frequency	Percent
Not able to pay high enough wages	26	36.0
Too much competition within the trucking industry	10	13.6
Too much competition from other sectors outside trucking	9	12.1
Not enough people are being trained	9	12.1

* multiple responses possible

5.1.6 Dispatcher

Nearly two-thirds of respondents (64.6%) reported moderate to extreme challenges in recruiting and retaining dispatchers (Figure 5.6). The most commonly cited reason (40.1%) was that not enough people are being trained

as dispatchers. Other frequently cited reasons included insufficient wages (22.1%), and too much competition for dispatchers within the trucking industry (20.8%).

Figure 5.6: Level of Challenge to Recruit and Retain Dispatchers (n=286)

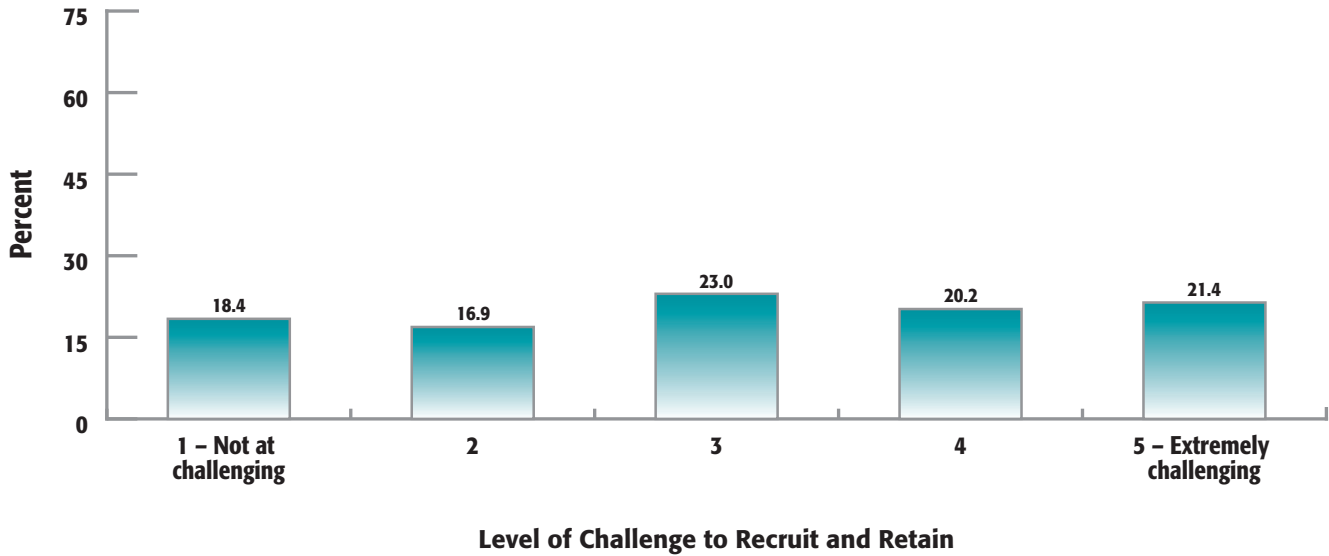


Table 5.6: Top Reasons for Challenges to Recruit and Retain Dispatchers

Challenges	Frequency	Percent
Not enough people are being trained	100	40.1
Not able to pay high enough wages	55	22.1
Too much competition within the trucking industry	52	20.8
Too much competition from other sectors outside trucking	21	8.6
Retirements	2	0.8

* multiple responses possible

5.1.7 Freight Claims and Safety and Loss Prevention Specialist

As illustrated in Figure 5.7, approximately one-half of respondents (50.8%) indicated that recruiting and retaining freight claims and safety and loss prevention

specialists was moderately to extremely challenging. The most frequently cited reason was not enough people were being trained for this job (34.3%—see Table 5.7).

Figure 5.7: Level of Challenge to Recruit and Retain Freight Claims and Safety and Loss Prevention Specialists (n=226)

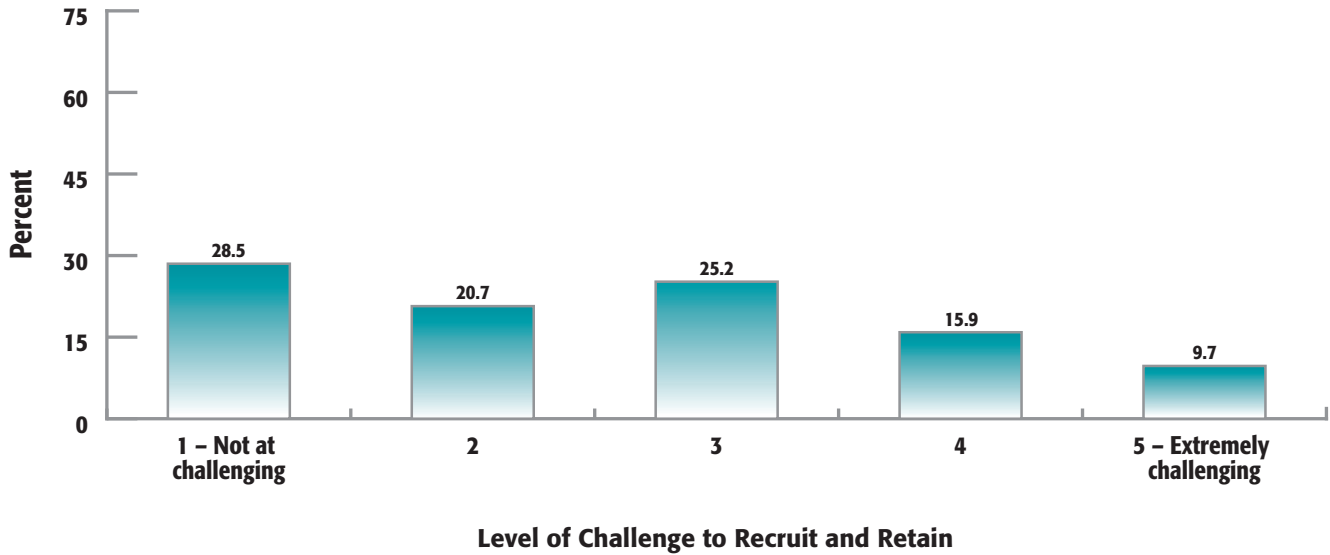


Table 5.7: Top Reasons for Challenges to Recruit and Retain Freight Claims and Safety and Loss Prevention Specialists

Challenges	Frequency	Percent
Not enough people are being trained	63	34.3
Not able to pay high enough wages	27	14.4
Too much competition within the trucking industry	18	9.9
Too much competition from other sectors outside trucking	17	9.2
Retirements	2	0.8

* multiple responses possible

5.1.8 Foreman/Supervisor/Manager

Nearly two-thirds of the respondents (64.8%) reported moderate to extreme challenges in recruiting foremen, supervisors or managers. As illustrated in Table 5.8, most (21.9%) cited the challenge of too much competition for

these employees within the trucking industry. Other frequently cited reasons included not enough people being trained (15.5%) and competition for these positions outside the industry (14.6%).

Figure 5.8: Level of Challenge to Recruit and Retain Foremen/Supervisors/Managers (n=239)

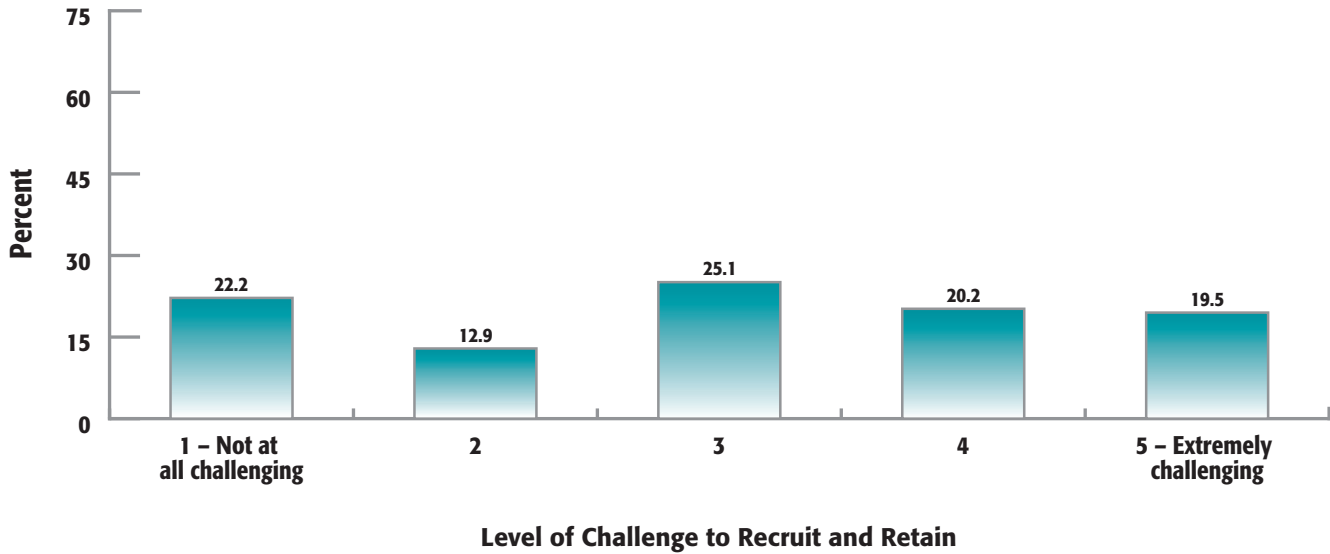


Table 5.8: Top Reasons for Challenges to Recruit and Retain Foremen/Supervisors/Managers

Challenges	Frequency	Percent
Too much competition within the trucking industry	40	21.9
Not enough people are being trained	28	15.5
Too much competition from other sectors outside trucking	27	14.6
Not able to pay high enough wages	25	13.8
Possible internal candidates don't have soft skills needed	22	12.0
Managers available don't know about trucking industry	20	10.9
Retirements	3	1.8

* multiple responses possible

5.2 Best Approaches for Recruiting

5.2.1 Truck/Transport Mechanic

As illustrated in Table 5.9, the most frequently cited approaches for recruiting mechanics included referrals from current staff (51.2%), advertising in trade journals, newspapers, etc. (40.4%), and sponsoring apprentices (34.9%).

5.2.2 Truck/Trailer Technician

Best approaches to recruiting truck/trailer technicians were referrals from current staff (49.8%), advertising in trade journals, newspapers, etc. (42.2%), and sponsoring apprentices (35.0%).

5.2.3 Parts Technician

As illustrated in Table 5.11, nearly one-half of respondents reported the best approaches for recruiting parts technicians were advertising in trade journals, newspapers, etc. (46.9%), and referrals from current staff (45.0%).

Table 5.9: Best Approaches for Recruiting Mechanics

Approach	Frequency	Percent
Referrals from current staff	96	51.2
Advertise in trade journals, newspapers, etc.	76	40.4
Sponsor apprentices	65	34.9
Recruit directly from colleges/training institutions	34	18.2

* multiple responses possible

Table 5.10: Best Approaches for Recruiting Truck/Trailer Technicians

Approach	Frequency	Percent
Referrals from current staff	68	49.8
Advertise in trade journals, newspapers, etc.	58	42.2
Sponsor apprentices	48	35.0
Recruit directly from colleges/training institutions	23	17.0

* multiple responses possible

Table 5.11: Best Approaches for Recruiting Parts Technicians

Approach	Frequency	Percent
Advertise in trade journals, newspapers, etc.	39	46.9
Referrals from current staff	37	45.0
Recruit directly from colleges/training institutions	6	6.7
Identify current employees to train into this position	5	6.0

* multiple responses possible

5.2.4 Shunt Driver

About one-half of respondents indicated the best approach for recruiting shunt drivers was to obtain referrals from current staff (47.3%), and to advertise in trade journals, newspapers, etc. (42.9%).

5.2.5 Cargo Worker

Over one-half (57.1%) rely on referrals from current staff to recruit cargo workers. About one-half (47.4%) advertise in trade journals, newspapers, etc.

5.2.6 Dispatcher

As illustrated in Table 5.14, the most frequently reported approaches for recruiting dispatchers included obtaining referrals from current staff (46.7%), and advertising in trade journals, newspapers, etc. (46.3%).

Table 5.12: Best Approaches for Recruiting Shunt Drivers

Approach	Frequency	Percent
Referrals from current staff	43	47.3
Advertise in trade journals, newspapers, etc.	39	42.9
Recruit directly from colleges/training institutions	13	14.7
Identify current employees to train into this position	6	6.6

* multiple responses possible

Table 5.13: Best Approaches for Recruiting Cargo Workers

Approach	Frequency	Percent
Referrals from current staff	54	57.1
Advertise in trade journals, newspapers, etc.	45	47.4
Recruit directly from colleges/training institutions	7	7.8
Identify current employees to train into this position	4	4.0

* multiple responses possible

Table 5.14: Best Approaches for Recruiting Dispatchers

Approach	Frequency	Percent
Referrals from current staff	121	46.7
Advertise in trade journals, newspapers, etc.	119	46.3
Recruit directly from colleges/training institutions	37	14.5
Identify current employees to train into this position	24	9.5

* multiple responses possible

5.2.7 Freight Claims and Safety and Loss Prevention Specialist

As illustrated in Table 5.15, nearly one-half of respondents reported the best approaches for recruiting freight claims and safety and loss prevention specialists were to advertise in trade journals, newspapers, etc. (47.1%), and obtain referrals from current staff (35.7%).

5.2.8 Foreman/Supervisor/Manager

Best approaches to recruiting a foreman, supervisor or manager were to advertise in trade journals, newspapers, etc. (49.5%), and obtain referrals from current staff (43.8%).

Table 5.15: Best Approaches for Recruiting Freight Claims and Safety and Loss Prevention Specialists

Approach	Frequency	Percent
Advertise in trade journals, newspapers, etc.	92	47.1
Referrals from current staff	70	35.7
Recruit directly from colleges/training institutions	24	12.4
Identify current employees to train into this position	21	10.8

* multiple responses possible

Table 5.16: Best Approaches for Recruiting Foreman/Supervisor/Manager

Approach	Frequency	Percent
Advertise in trade journals, newspapers, etc.	98	49.5
Referrals from current staff	87	43.8
Identify current employees to train into this position	25	12.5
Recruit directly from colleges/training institutions	21	10.4

* multiple responses possible

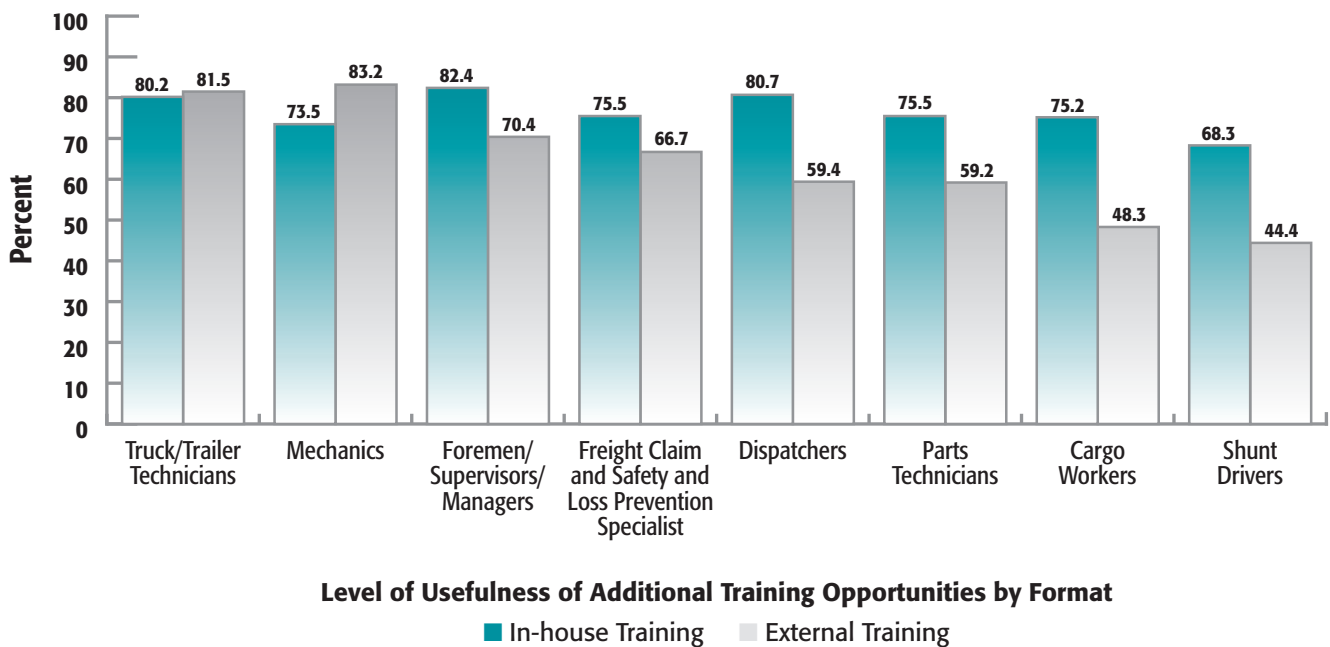
6. Training for Non-driving Occupations

A subset of survey respondents was asked questions about whether additional training was beneficial for non-drivers, and the type of training needed.

6.1 Format for Training Opportunities

An overview of the percentage of respondents who felt additional training would be moderately to extremely useful for each occupation is shown in Figure 6.

Figure 6: Level of Usefulness of Additional Training Opportunities by Format



6.1.1 Truck/Transport Mechanic

As illustrated in Figure 6.1, the majority feel additional training for truck/transport mechanics would be moderately to extremely useful. A slightly higher proportion of respondents (83.3%) felt external training would be moderately to extremely useful when compared with the proportion supporting in-house training (73.9%).

6.1.2 Truck/Trailer Technician

The majority of respondents supported the concept of having additional training opportunities for truck/trailer technicians on staff (Figure 6.2). Similar proportions of respondents indicated that in-house training opportunities (80.3%) and external training opportunities (81.5%) would be moderately to extremely useful for truck/trailer technicians.

Figure 6.1: Level of Usefulness of Additional Training Opportunities by Format for Mechanics (n=210)

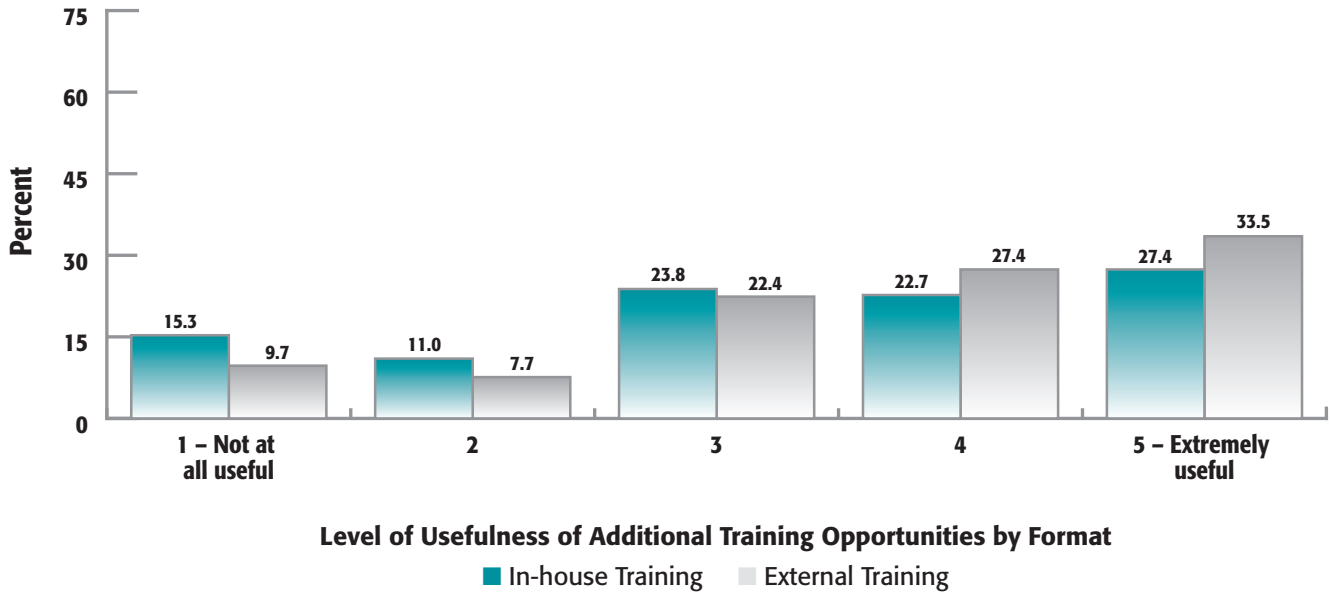
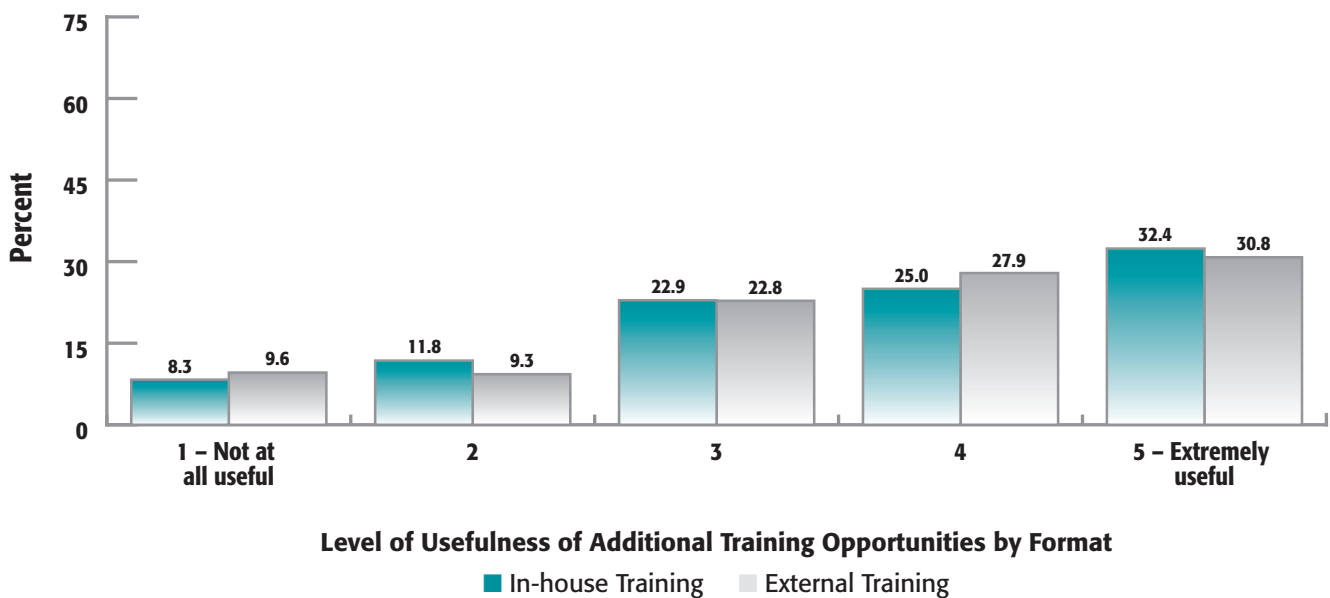


Figure 6.2: Level of Usefulness of Additional Training Opportunities by Format for Truck/Trailer Technician (n=160)



6.1.3 Parts Technician

As illustrated in Figure 6.3, the majority feel additional training for parts technicians would be moderately to extremely useful. A slightly higher proportion of respondents (75.5%) reports that in-house training would be moderately to extremely useful when compared with the proportion supporting external training (59.2%).

6.1.4 Shunt Driver

About two-thirds (68.2%) of respondents reported that training would be moderately to extremely useful. There was less support for external training opportunities for shunt drivers with under one-half of respondents (44.5%) reporting that these would be moderately to extremely useful. (Figure 6.4)

Figure 6.3: Level of Usefulness of Additional Training Opportunities by Format for Parts Technician (n=113)

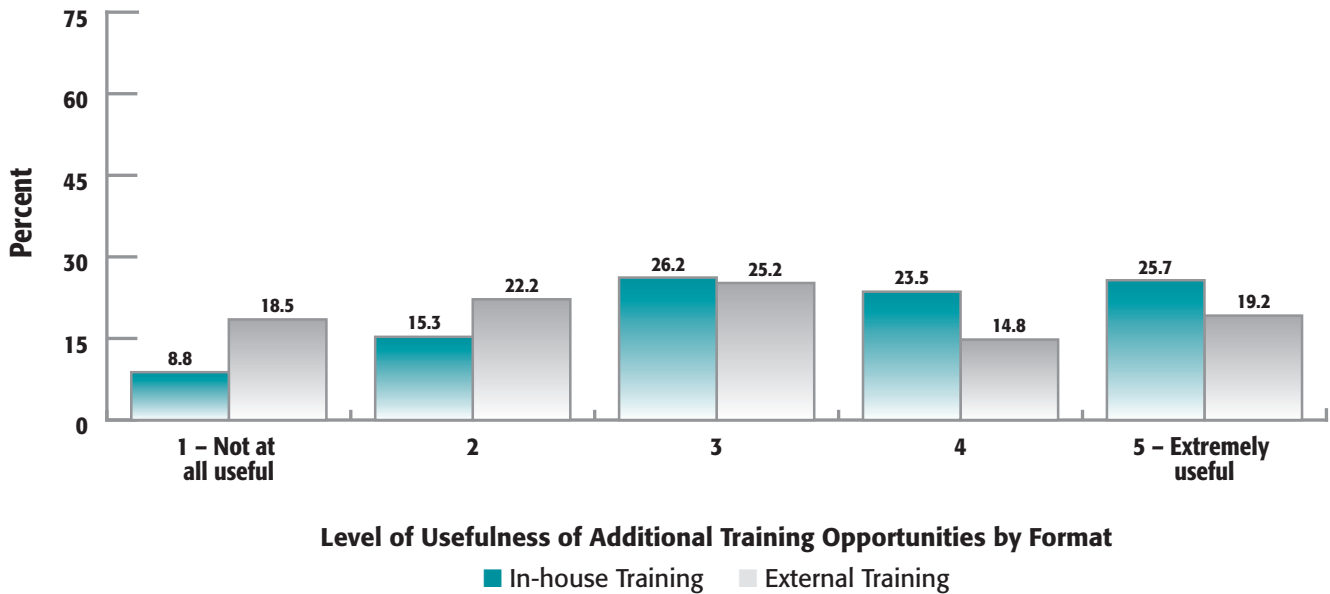
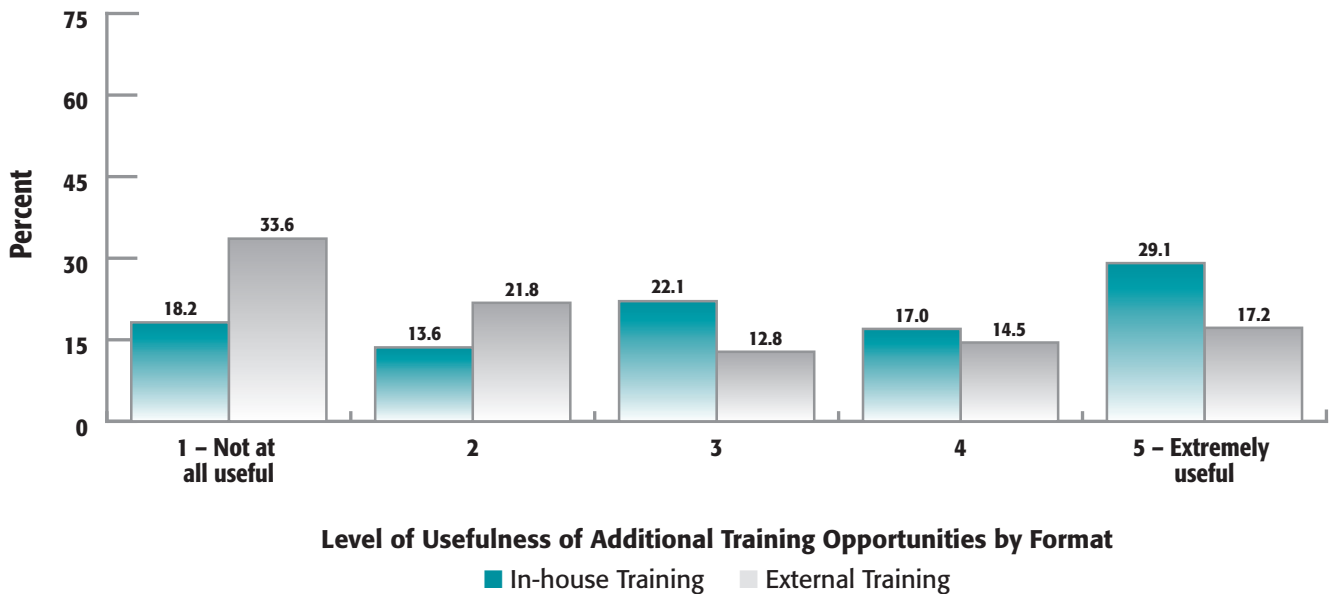


Figure 6.4: Level of Usefulness of Additional Training Opportunities by Format for Shunt Drivers (n=105)



6.1.5 Cargo Worker

As illustrated in Figure 6.5, there was a stronger preference for additional in-house training for cargo workers when compared with external opportunities. A higher proportion of respondents (74.2%) reports that in-house training would be moderately to extremely useful compared to those supporting external training (48.2%).

6.1.6 Dispatcher

As illustrated in Figure 6.6, the majority feel additional training for dispatchers would be moderately to extremely useful. A higher proportion of respondents (80.7%) said in-house training would be moderately to extremely useful when compared with the proportion supporting external training (59.4%).

Figure 6.5: Level of Usefulness of Additional Training Opportunities by Format for Cargo Worker (n=110)

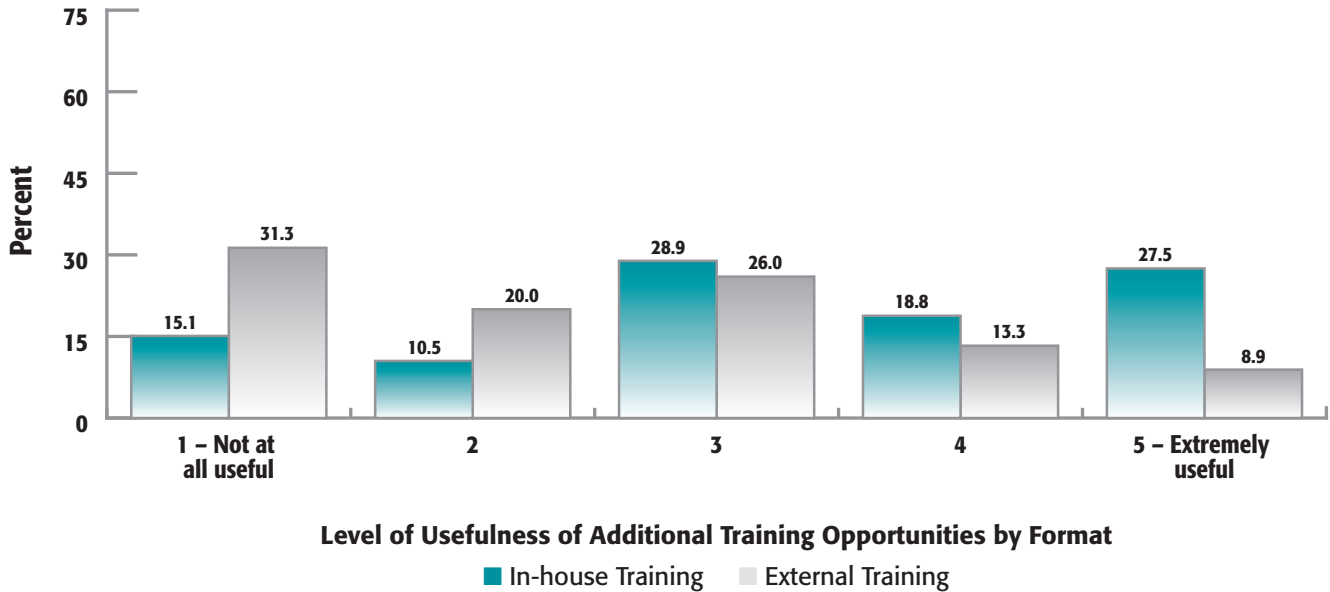
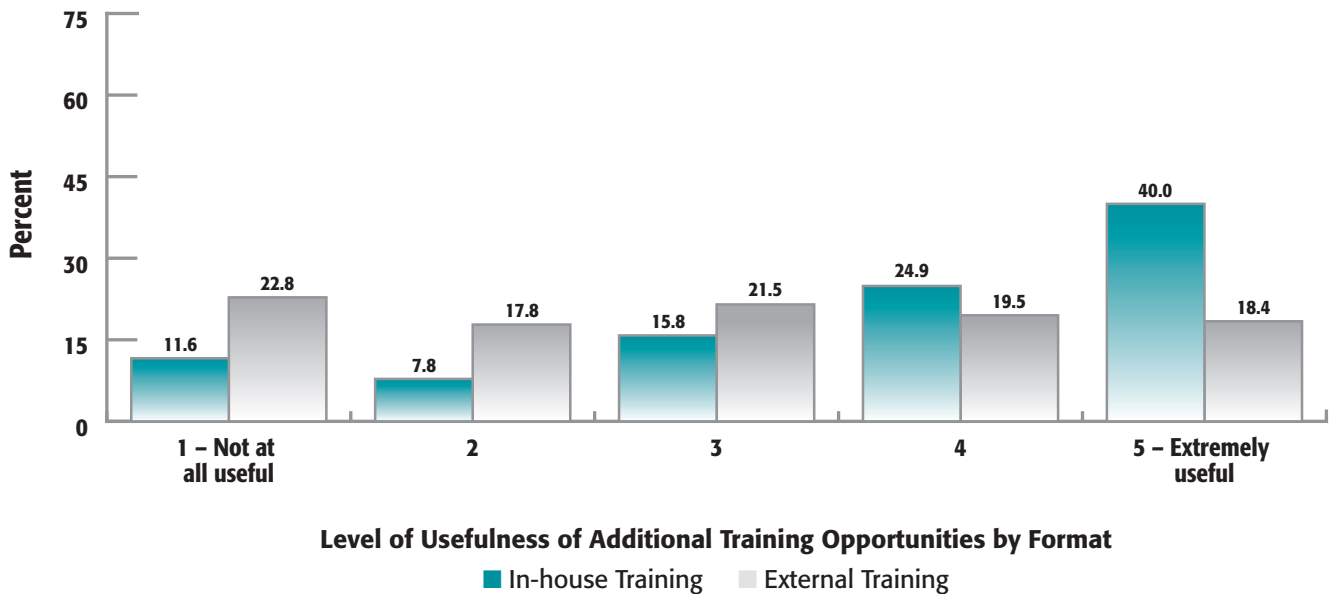


Figure 6.6: Level of Usefulness of Additional Training Opportunities by Format for Dispatcher (n=277)



6.1.7 Freight Claims and Safety and Loss Prevention Specialist

As illustrated in Figure 6.7, the majority feel additional training for freight claims and safety and loss prevention specialists would be moderately to extremely useful. A slightly higher proportion of respondents (75.5%) said external training would be moderately to extremely useful when compared with the proportion supporting in-house training (66.7%).

6.1.8 Foreman/Supervisor/Manager

As illustrated in Figure 6.8, there was a stronger preference for additional in-house training for foremen, supervisors and managers when compared to external training. A higher proportion of respondents (82.4%) said in-house training would be moderately to extremely useful when compared with the proportion supporting external training (70.4%).

Figure 6.7: Level of Usefulness of Additional Training Opportunities by Format for Freight Claims and Safety and Loss Prevention Specialist (n=237)

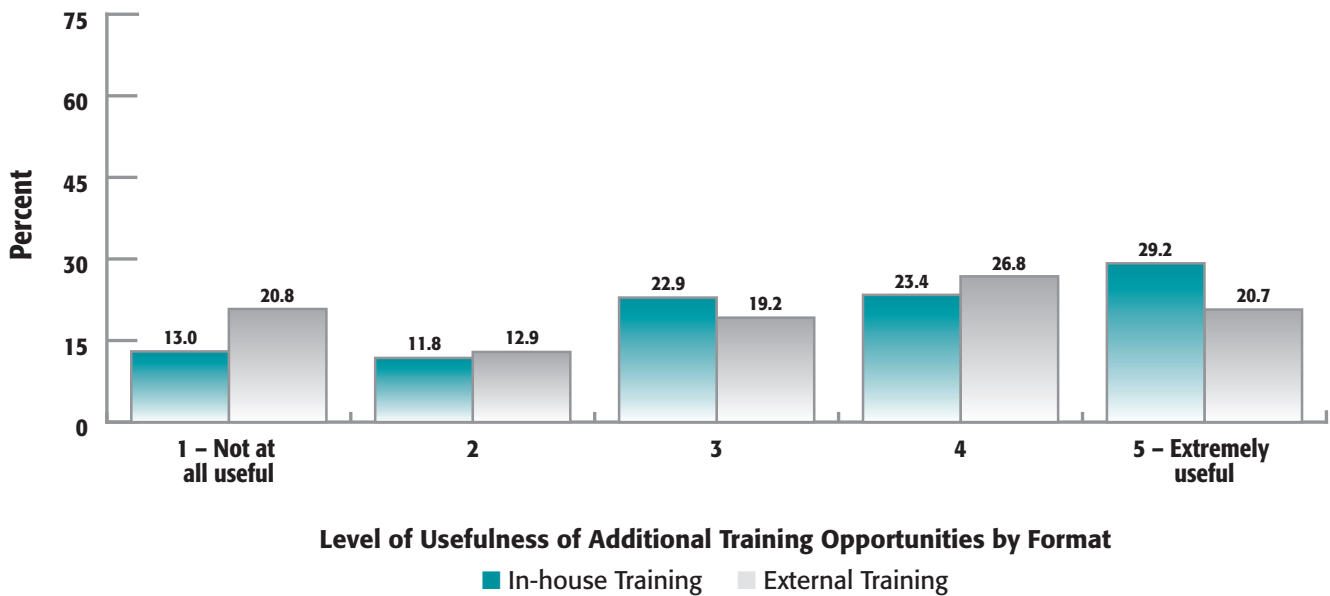
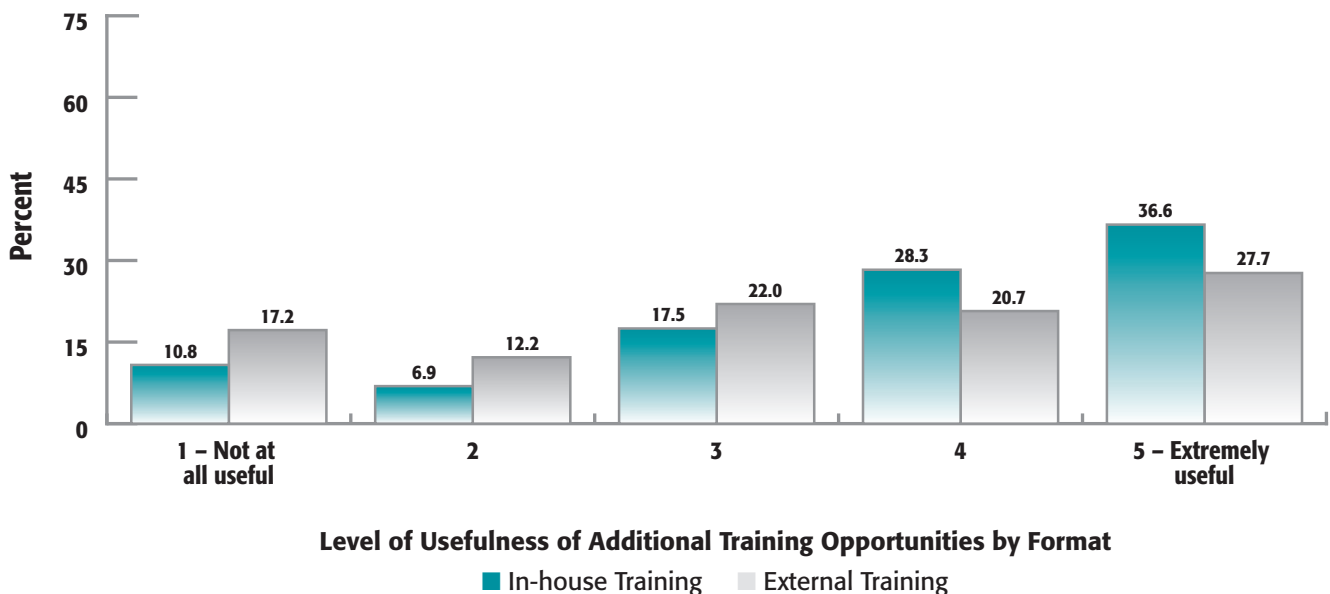


Figure 6.8: Level of Usefulness of Additional Training Opportunities by Format for Foreman/Supervisor/Manager (n=237)



6.2 Types of Training Opportunities

6.2.1 Truck/Transport Mechanic

As illustrated in Table 6.1, the most frequently cited types of training that would be useful for mechanics involved upgrading on new types of equipment, parts and software (75.1%), additional technical skills (56.1%), and soft-skills training (27.0%).

6.2.2 Truck/Trailer Technician

Training deemed to be useful for truck/trailer technicians was similar to mechanics. The most frequently cited types of training was upgrading on new types of equipment, parts and software (72.0%), additional technical skills (66.6%), and soft-skills training (30.9%).

6.2.3 Parts Technician

As illustrated in Table 6.3, training for parts technician similar to mechanics and other technicians. Respondents said the most useful types of training included upgrading on new types of equipment, parts and software (59.4%), additional technical skills (50.8%), and soft-skills training (41.8%).

Table 6.1: Types of Useful Training for Mechanics

Approach	Frequency	Percent
Upgrading on new types of equipment/parts/software	123	75.1
Additional technical skills	92	56.1
Soft-skills training (e.g., teamwork, time management, communication, etc.)	44	27.0

* multiple responses possible

Table 6.2: Types of Useful Training for Truck/Trailer Technician

Approach	Frequency	Percent
Upgrading on new types of equipment/parts/software	88	72.0
Additional technical skills	81	66.6
Soft-skills training (e.g., teamwork, time management, communication, etc.)	38	30.9

* multiple responses possible

Table 6.3: Types of Useful Training for Parts Technician

Approach	Frequency	Percent
Upgrading on new types of equipment/parts/software	51	59.4
Additional technical skills	44	50.8
Soft-skills training (e.g., teamwork, time management, communication, etc.)	36	41.8

* multiple responses possible

6.2.4 Shunt Driver

The most frequently cited type of useful training for shunt drivers was upgrading driving skills (36.6%). Other commonly cited types of training for shunt drivers included soft-skills training (31.7%), and additional technical skills (29.3%).

6.2.5 Cargo Worker

As illustrated in Table 6.5, the most frequently cited types of useful training for cargo workers included soft-skills training (51.4%), additional technical skills (41.2%), and occupational health and safety (37.5%).

6.2.6 Dispatcher

The most frequently cited type of useful training for dispatchers was soft-skills training (59.4%). Other commonly cited types of training for dispatchers included additional technical skills (42.3%), and upgrading on new types of equipment, parts and software (37.2%).

Table 6.4: Types of Useful Training for Shunt Driver

Approach	Frequency	Percent
Upgrading driving skills	26	36.6
Soft-skills training (e.g., teamwork, time management, communication, etc.)	23	31.7
Additional technical skills	21	29.3

* multiple responses possible

Table 6.5: Types of Useful Training for Cargo Worker

Approach	Frequency	Percent
Soft-skills training (e.g., teamwork, time management, communication, etc.)	39	51.4
Additional technical skills	31	41.2
Occupational health and safety	28	37.5

* multiple responses possible

Table 6.6: Types of Useful Training for Dispatcher

Approach	Frequency	Percent
Soft-skills training (e.g., teamwork, time management, communication, etc.)	142	59.4
Additional technical skills	101	42.3
Upgrading on new types of equipment/parts/software	89	37.2

* multiple responses possible

6.2.7 Freight Claims and Safety and Loss Prevention Specialist

As illustrated in Table 6.7, the most frequently cited types of training useful for freight claims and safety and loss prevention specialists was upgrading on new types of policies and practices (51.6%), soft-skills training (47.7%), and additional technical skills (30.2%).

6.2.8 Foreman/Supervisor/Manager

The most frequently cited types of useful training for foremen, supervisors and managers was upgrading on new types of policies and practices (61.5%), additional management skills (60.6%), and soft-skills training (55.6%).

Table 6.7: Types of Useful Training for Freight Claims and Safety and Loss Prevention Specialist

Approach	Frequency	Percent
Upgrading on new types of policies/practices	89	51.6
Soft-skills training (e.g., teamwork, time management, communication, etc.)	82	47.7
Additional technical skills	52	30.2

* multiple responses possible

Table 6.8: Types of Useful Training for Foreman/Supervisor/Manager

Approach	Frequency	Percent
Upgrading on new types of policies/practices	118	61.5
Additional management skills	116	60.6
Soft-skills training (e.g., teamwork, time management, communication, etc.)	106	55.6
Additional technical skills	23	11.9

* multiple responses possible

7. Return to Workforce Post-Retirement

A subset was surveyed about retired workers returning to the workplace. As illustrated in Table 7.1, approximately one-fifth of respondents (16.2% to 24.6%) said they had no relevant information on this topic.

The occupation most likely to have some employees who returned to the workforce after a period of retirement was shunt drivers (12.8% of firms). Similar proportions of firms reported post-retirement returns for supervisors and managers (7.9% of firms) and dispatchers (7.0% of firms).

Table 7.1: Return to Workforce Post-Retirement by Occupation

Occupation		Frequency	Percent
Mechanics	No employees in this position have returned to workforce after period of retirement	126	74.4
	Some employees in this position have returned to workforce after period of retirement	8	5.0
	Don't know	35	20.5
	Total	169	100.0
Trailer Technicians	No employees in this position have returned to workforce after period of retirement	92	75.4
	Some employees in this position have returned to workforce after period of retirement	4	3.2
	Don't know	26	21.5
	Total	122	100.0
Parts Technicians	No employees in this position have returned to workforce after period of retirement	68	71.2
	Some employees in this position have returned to workforce after period of retirement	4	4.1
	Don't know	23	24.6
	Total	95	100.0
Shunt Drivers	No employees in this position have returned to workforce after period of retirement	61	66.9
	Some employees in this position have returned to workforce after period of retirement	12	12.8
	Don't know	19	20.6
	Total	92	100.0
Cargo Workers	No employees in this position have returned to workforce after period of retirement	68	76.5
	Some employees in this position have returned to workforce after period of retirement	3	3.8
	Don't know	17	19.6
	Total	88	100.0
Dispatchers	No employees in this position have returned to workforce after period of retirement	198	75.7
	Some employees in this position have returned to workforce after period of retirement	18	7.0
	Don't know	45	17.2
	Total	261	100.0
Claims Specialists	No employees in this position have returned to workforce after period of retirement	155	80.1
	Some employees in this position have returned to workforce after period of retirement	8	4.1
	Don't know	31	16.2
	Total	194	100.0
Supervisors and Managers	No employees in this position have returned to workforce after period of retirement	141	74.9
	Some employees in this position have returned to workforce after period of retirement	15	7.9
	Don't know	32	17.2
	Total	188	100.0

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