



Your Workforce. Our Future.

January
2019

EmployerOne Full Technical Report



Workforce Planning Board
of Waterloo Wellington Dufferin



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Highlights of the Survey

(Numbers in brackets are from 2018 survey)

- **542** employers completed the EmployerOne survey (579)
- There were **47,992** workers within Waterloo Wellington Dufferin represented (44,094)
- **47%** of the workforce represented by survey respondents were ages 25-54 (67%)
- **70%** of the workforce represented by survey respondents were full-time employees (73%)
- **76%** of the respondents had separations in the past 12 months (76%)
- **88%** of the respondents indicated that they hired in the past 12 months (88%)
- Respondents hired a total of **14,249** positions in the past 12 months (8,982)
- **64%** of businesses indicated that they had positions that were difficult to fill in the past 12 months (59%)
- **65%** of respondents rated the availability of qualified workers as fair or poor (62%)
- **80%** of respondents said they plan to hire in 2018 (77%)
- Respondents plan to hire a total of **7,546** positions in 2019 (6,699)
- **84%** of respondents were able to provide professional development or training opportunities to their workers (86%)
- **50%** of responding businesses have a succession plan.

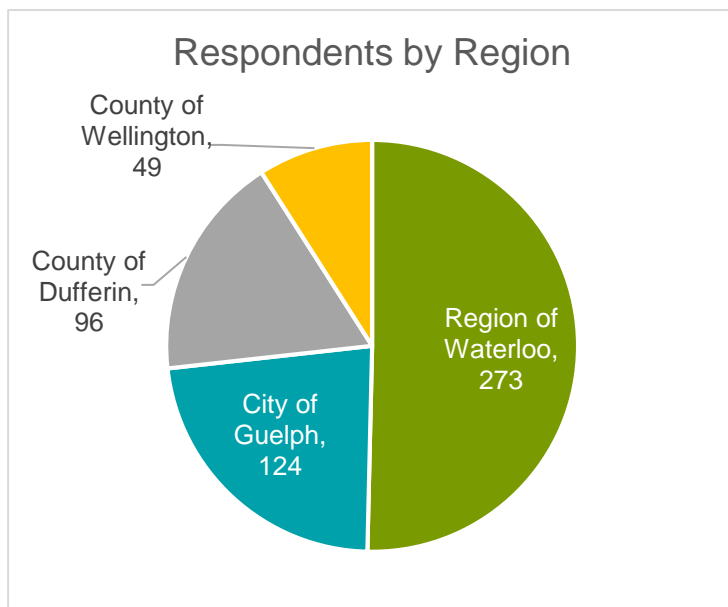
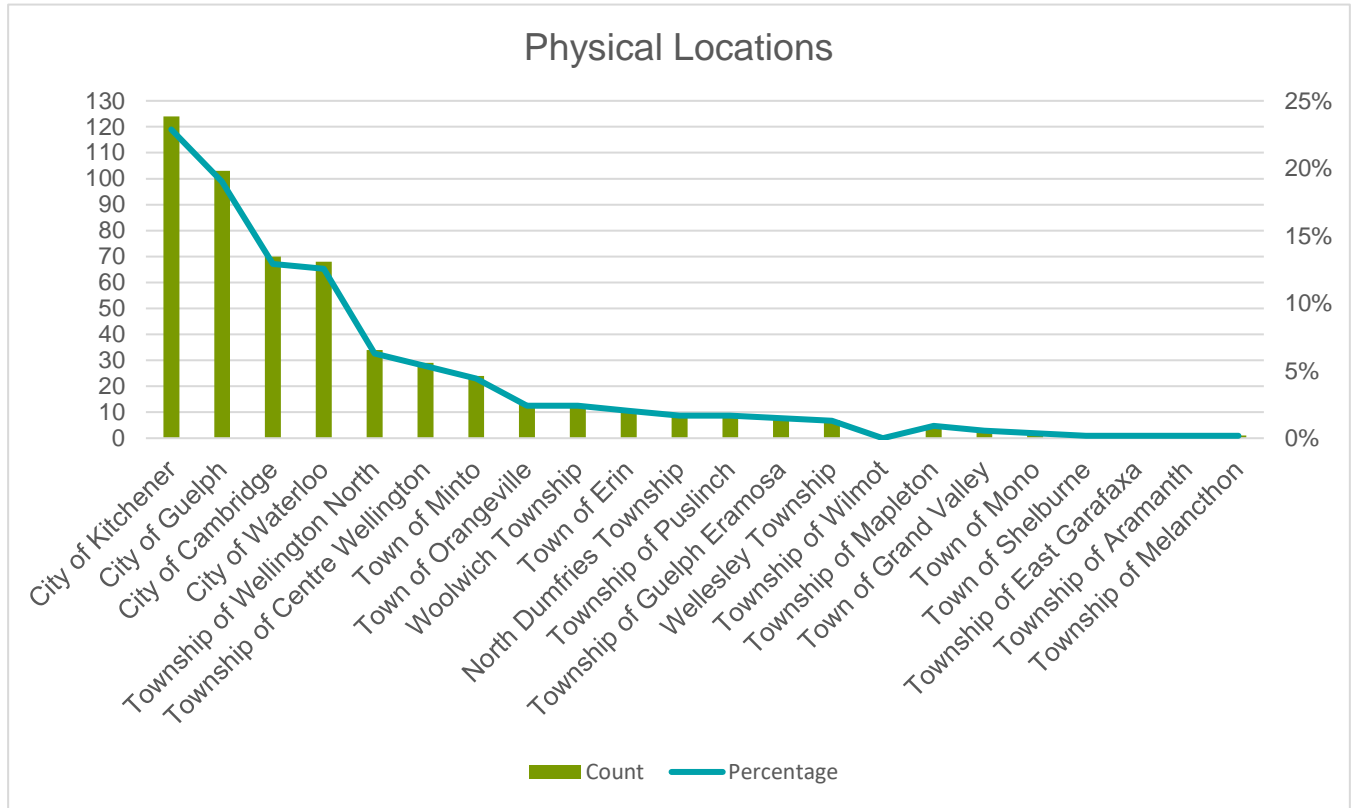


Significant changes in findings from 2017 to 2018 are noted throughout the report in green callouts

Section A: Organization and Workforce Characteristics

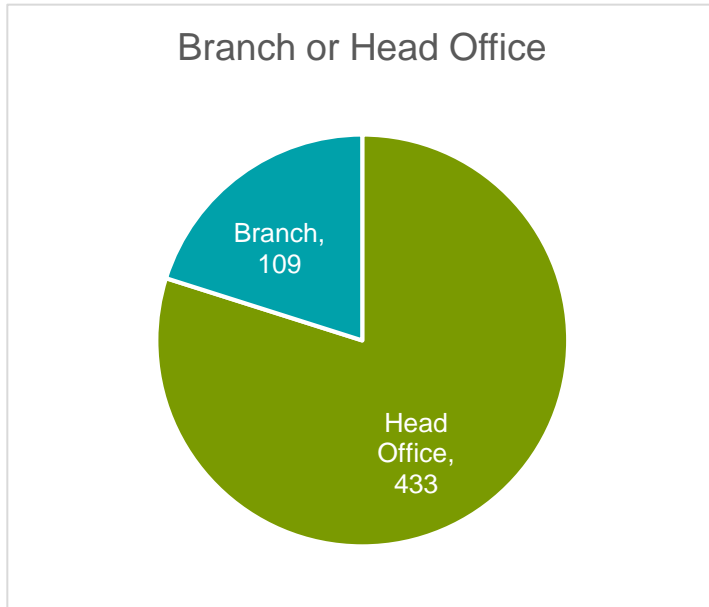
1. Business Name: Responses confidential

2. Location of your Business/Company/Organization (*Number of responses: 542*)



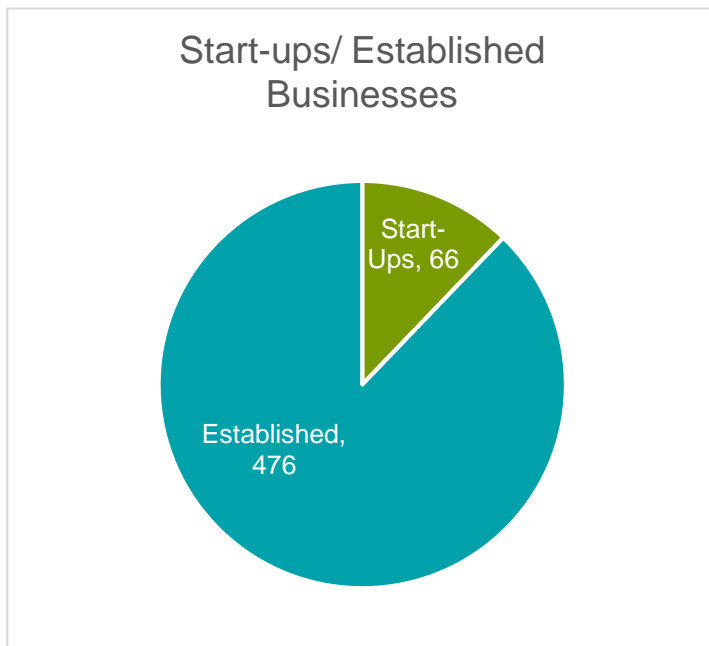
- **67%** of respondents were from the urban centres (Kitchener, Waterloo, Cambridge and Guelph).
- **33%** of respondents were from towns/rural communities.

3. Is your organization a head office or branch? (Number of responses: 542)



- **80%** of respondents were head office locations.
- **20%** of respondents were branches.

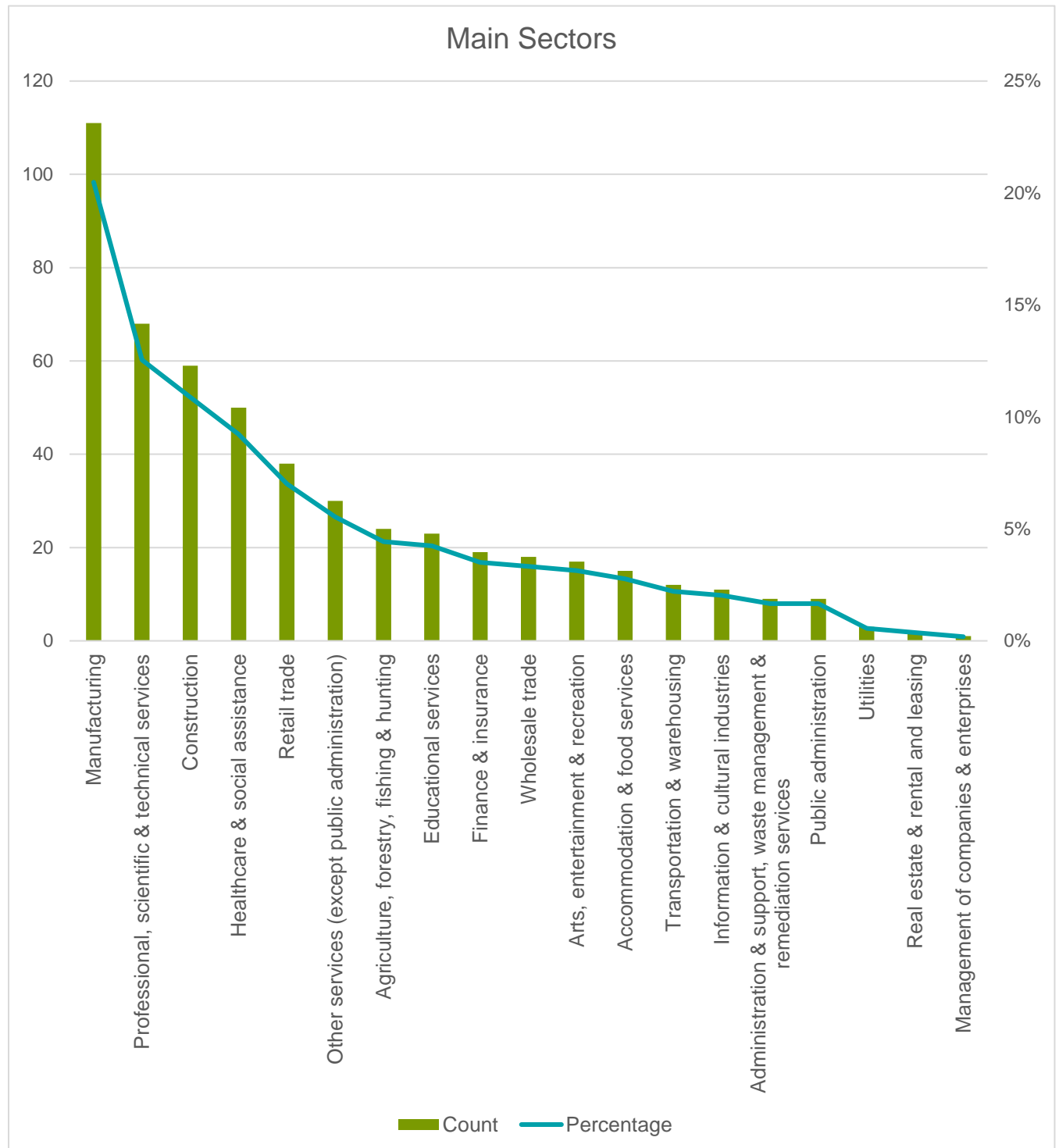
4. Is your business or organization a start-up (Established in the last five years)? (Number of responses: 542)



- **88%** of respondents indicated that they had been in business for five (5) years or more).
- **12%** of respondents indicated that they were start-ups.

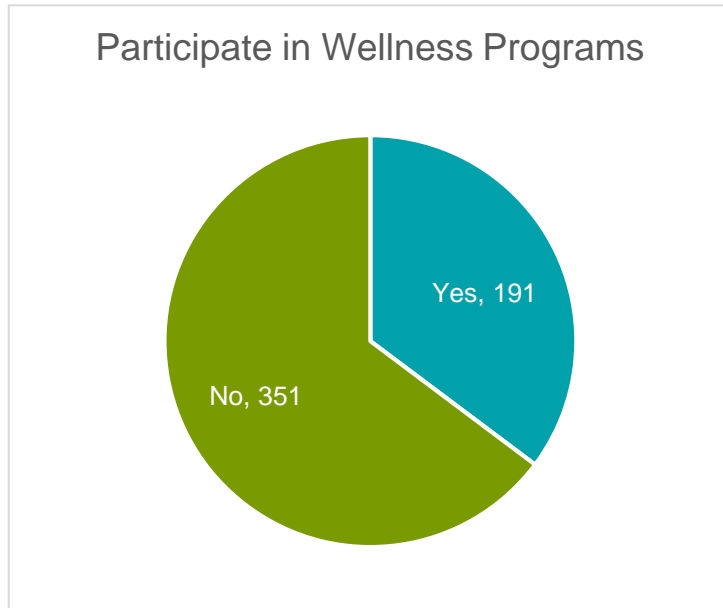
Top 3 Responding Sectors with Start-Ups	Number
Professional, scientific and technical services	9
Retail trade	8
Manufacturing	7

5. Select the main sector in which you operate? (Number of responses: 542)



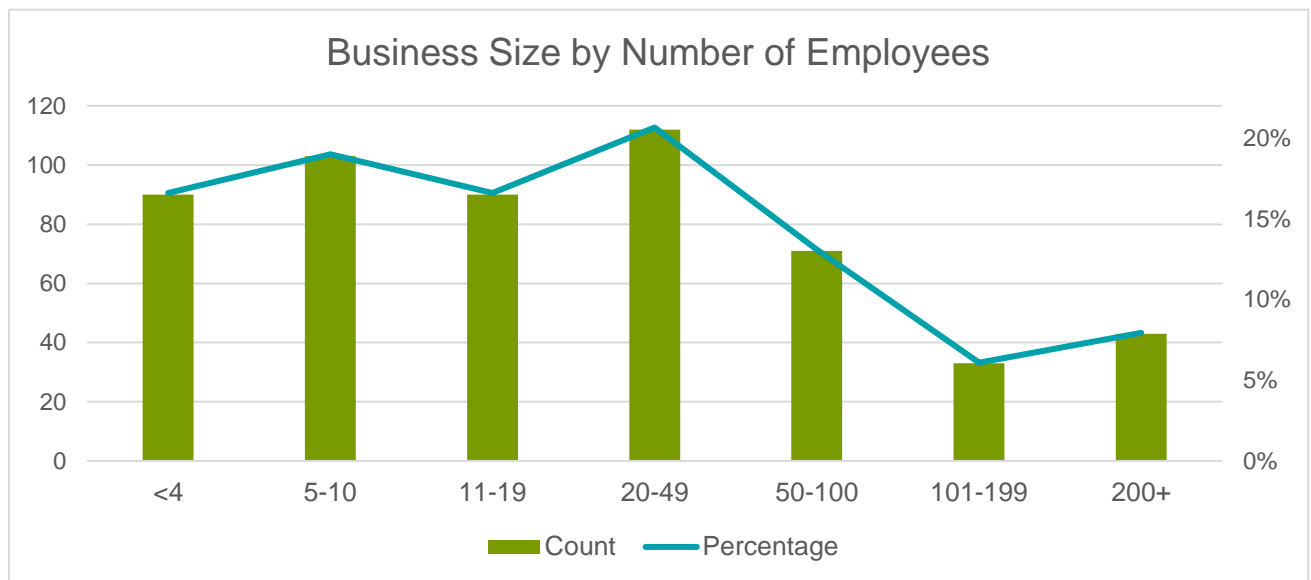
- The top four (4) sectors; Manufacturing, Professional Scientific and Technical Services, Construction, and Health Care and Social Assistance represented **53%** of all respondents.

6. Does your company participate in Workplace Wellness Programs? (Number of responses: 542)



- **35%** of respondents indicated that their company participated in workplace wellness programs.

7. How many employees does your organization have? (Number of responses: 542)

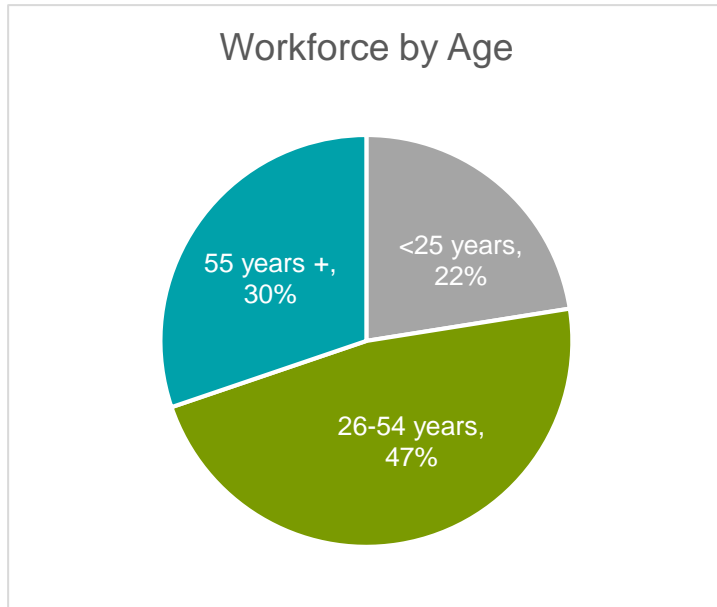


- Participation in the survey was represented by a good cross-section of business sizes by number of employees.
- The 542 respondents reported a total of **47,992** workers collectively.

The number of workers represented increased from 44,094 in 2017 to 47,992 in 2018, although the number of respondents decreased from 579 to 542 employers.

8. What percent of workers are 55 years of age or older? [Estimation]
See response with question 9 below

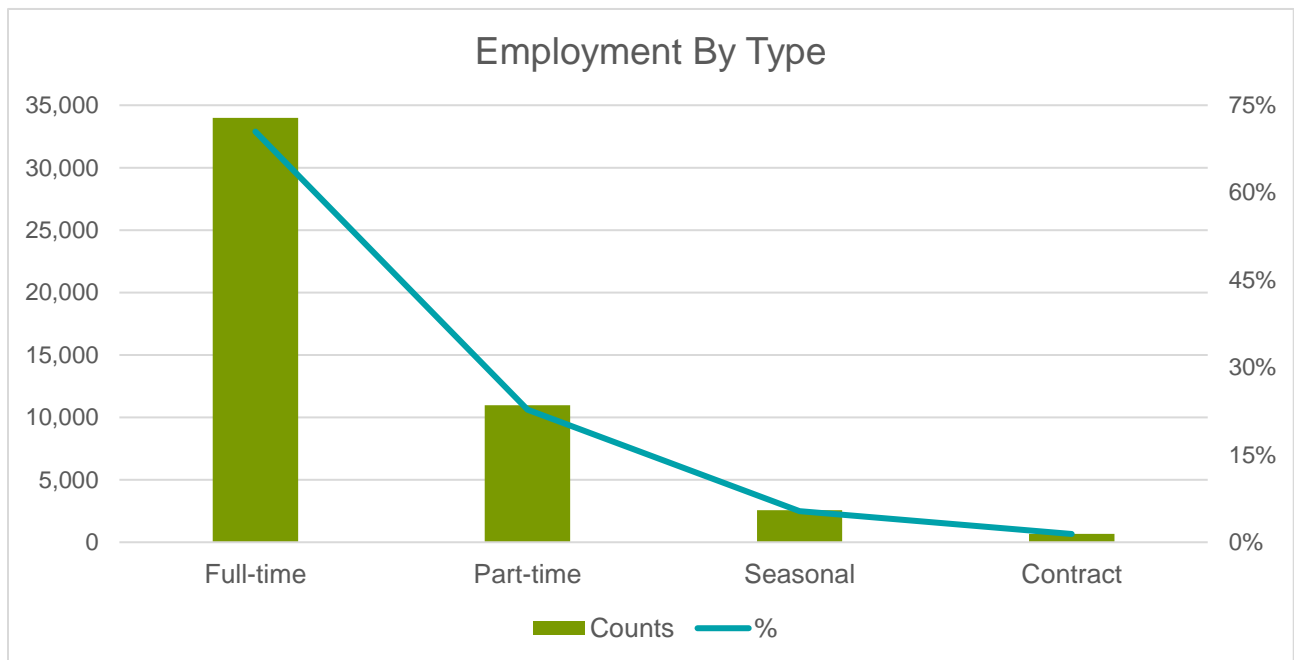
9. What percent of your staff is under 25? [Estimation]
(Number of responses: 542)



- **47%** of the workforce represented by survey respondents were ages 25-54.
- **30%** were nearing retirement (55+).
- **22%** were under the age of 25.

The percentage of workers represented in the survey between the ages of 25-54 years old decreased from 67% in 2017 to 47% in 2018; the number of workers under the age of 25 increased from 16% to 22%; the number of workers nearing retirement increased from 17% to 30%

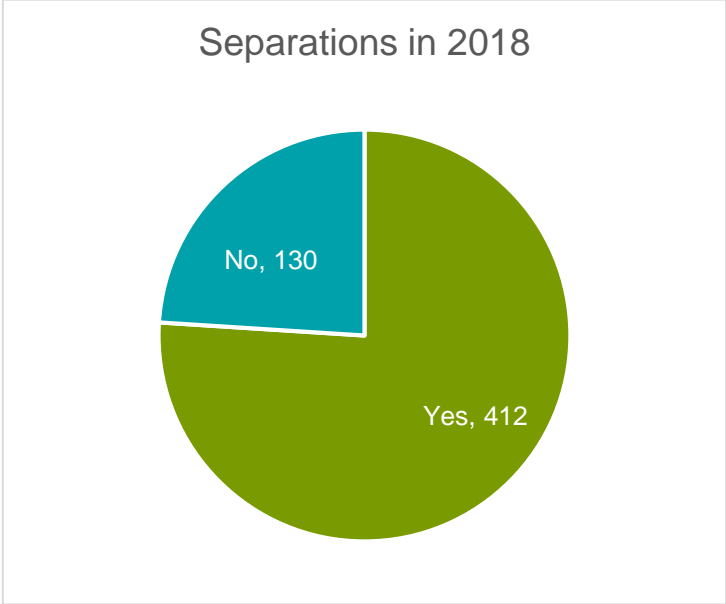
10. How many of your staff is full-time? Part-time? Contract/Seasonal? [Estimation] (Number of responses: 542)



- **70%** of the workforce represented by survey respondents were full-time employees.

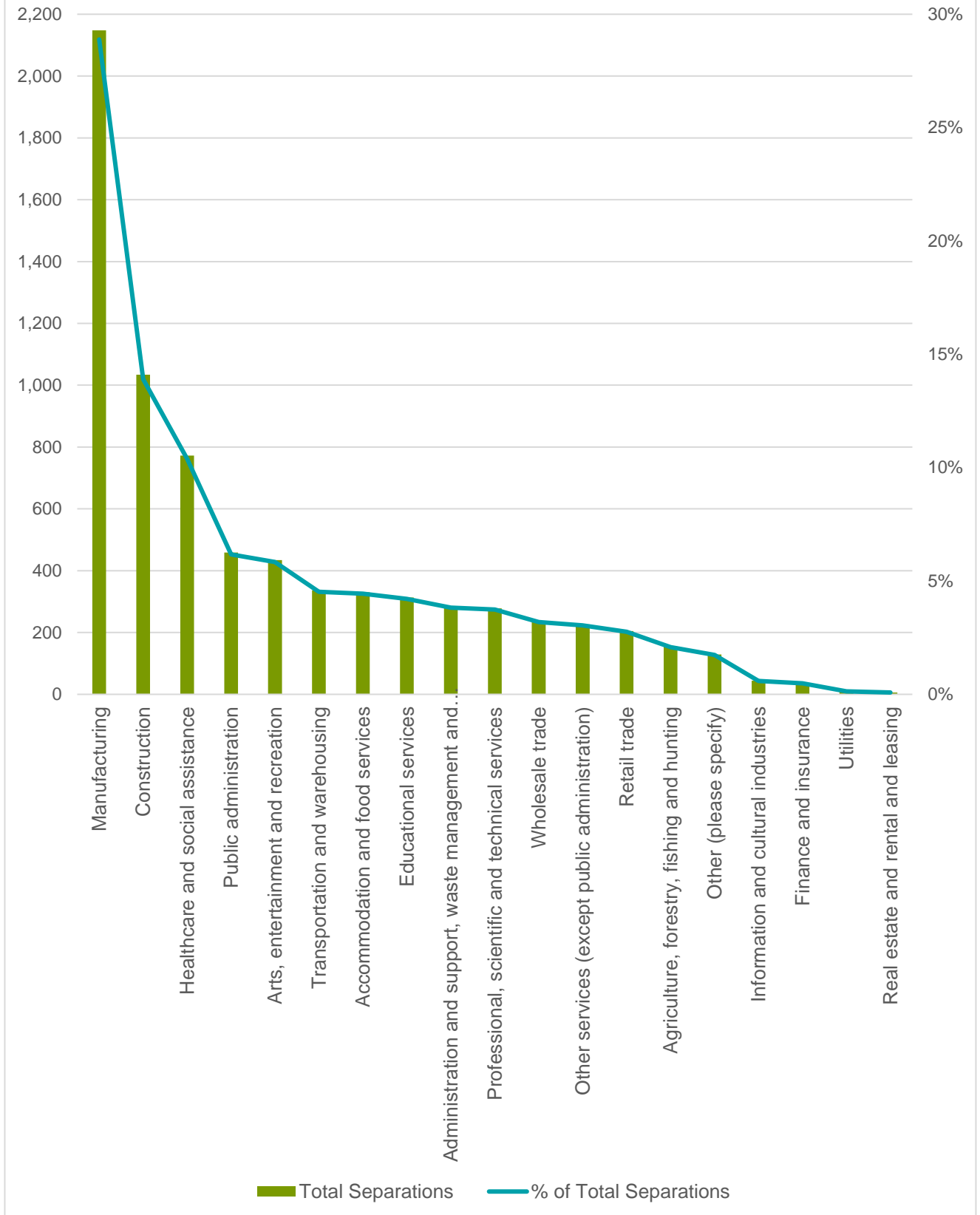
Section B: Separations

1. Did your organization experience any separations over the last 12 months? (Number of responses: 542)

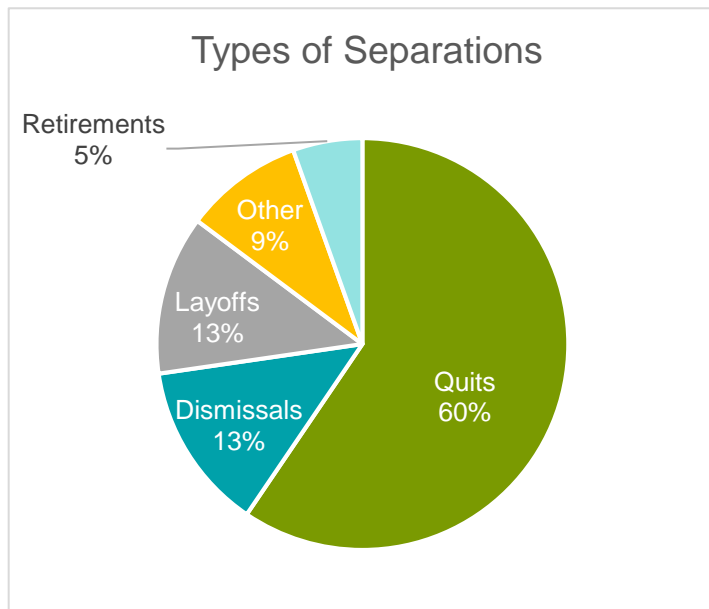


- Separations are defined as retirements, dismissals, permanent layoffs, temporary layoffs and other separations.
- **76%** of the respondents had separations in 2018.
- Respondents reported a total of **7,436** separations.

Separations by Sector



2. Please estimate the number of separations by category. (Number of responses: 412 businesses who noted they had separations).



• **60%** of the total separations were because of quits.

Sector	Total Separations	Quits	Retirements	Layoffs	Dismissals	Other*
Manufacturing	2,148	1,337	144	156	448	63
Construction	1,034	261	31	592	109	41
Healthcare and social assistance	772	624	53	3	50	42
Public administration	459	215	33	-	13	198
Arts, entertainment and recreation	434	346	4	80	4	-
Transportation and warehousing	336	265	11	1	56	3
Accommodation and food services	330	260	7	-	52	11
Educational services	313	40	52	1	13	207
Administration and support, waste management and remediation services	284	241	-	3	25	15
Professional, scientific and technical services	278	182	21	13	44	18
Wholesale trade	237	159	3	38	36	1
Other services (except public administration)	226	158	8	-	54	6
Retail trade	205	140	5	21	37	2
Agriculture, forestry, fishing and hunting	155	93	15	9	29	9
Other (please specify)	129	42	4	11	7	65
Information and cultural industries	44	30	2	1	-	11
Finance and insurance	36	22	8	1	3	2
Utilities	10	6	3	-	1	-
Real estate and rental and leasing	6	3	2	-	1	-
Total	7,436	4,424	406	930	982	694

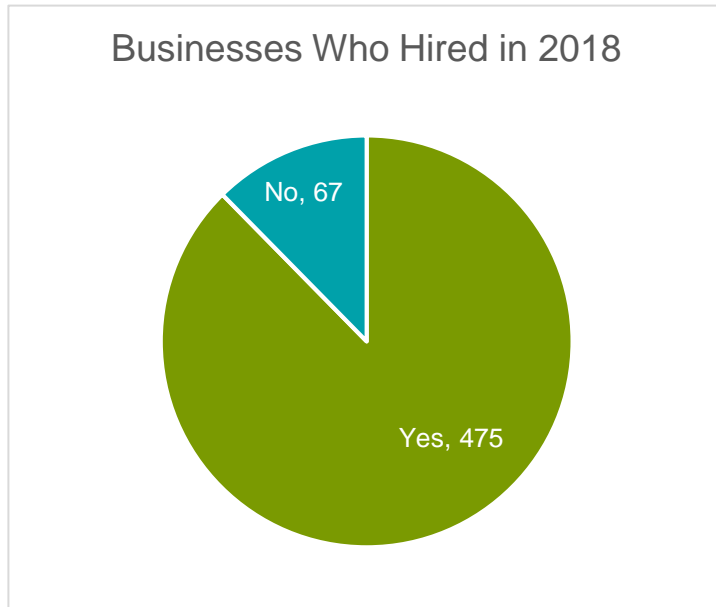
*Note: "Other" includes paid co-ops and seasonal positions

- **29%** of all separations were in the Manufacturing sector
- **14%** of all separations were in the Construction sector, while **10%** of all separations were in the Healthcare and Social Assistance sector.

The percentage of separations in the Manufacturing sector increased from 22% in 2017 to 29% in 2018. In the Health Care and social Services sector the percentage of separations decreased from 20% to 14%.

Section C: Hiring

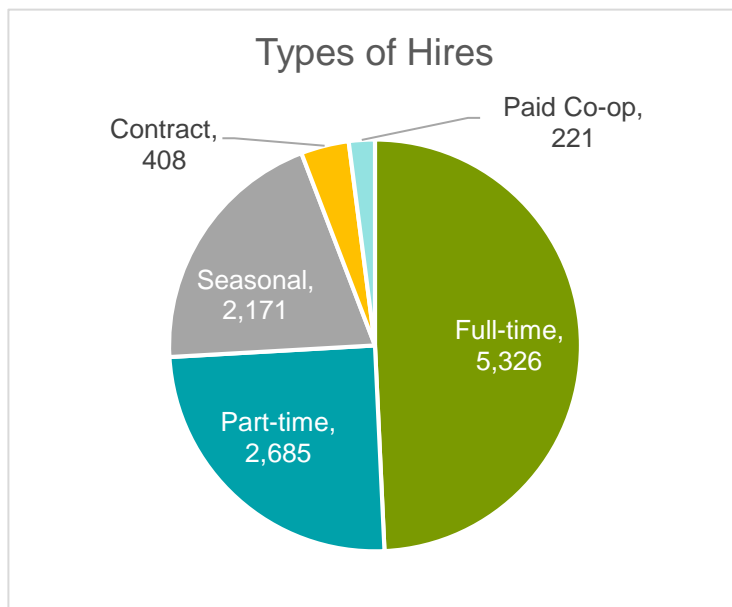
1. Did your organization hire any employees over the last 12 months? (Number of responses: 542) A hire is simply defined as an open position filled.



- **88%** of the respondents indicated that they hired in 2018.
- Respondents reported a total of **14,249** hires.

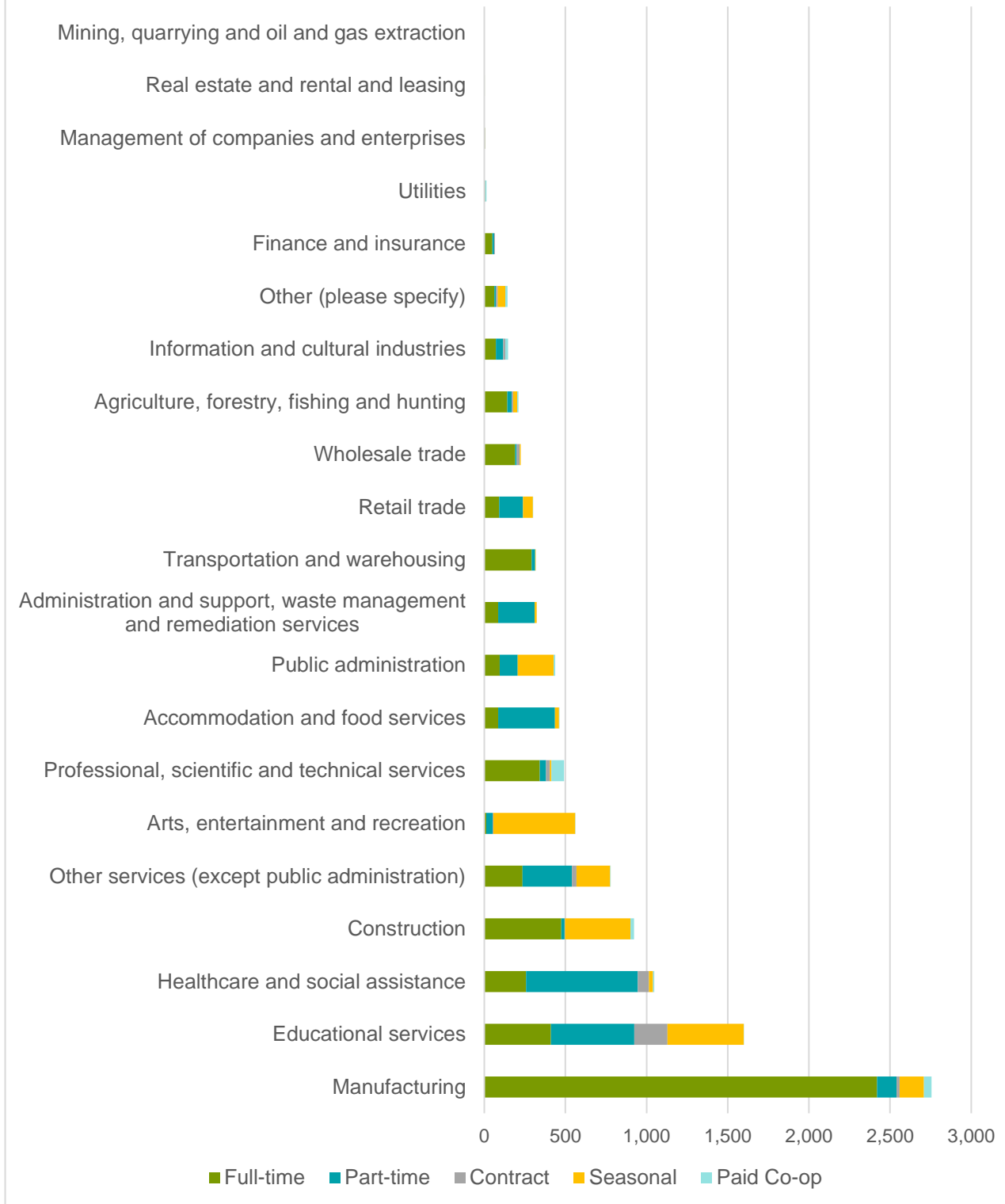
The number of positions hired by the survey respondents increased from 8,982 in 2017 to 14,249 in 2018.

2. How many were in the following categories? (Number of responses: 475)



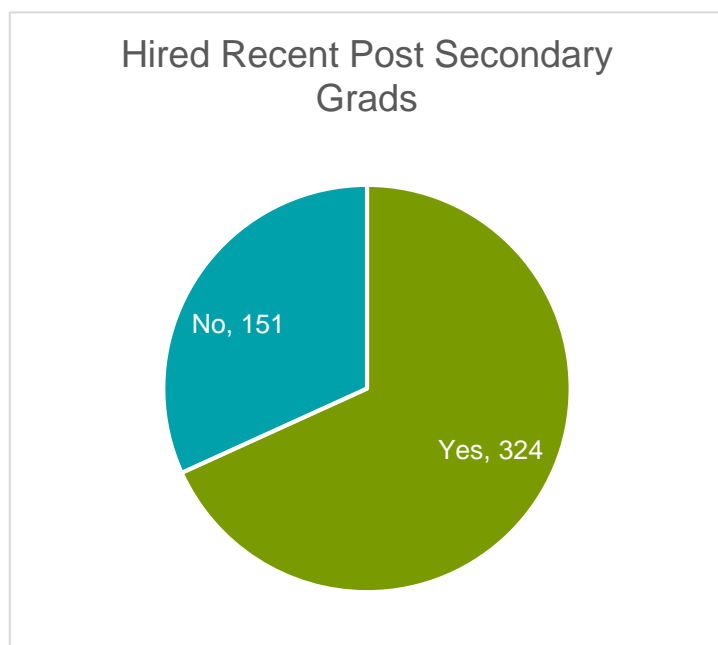
- **49%** of the hires in 2018 were full-time positions.

Hires by Sector and Type



- **25%** of the hires in 2018 reported by respondents were in the Manufacturing sector and **15%** were in the Educational Services sector.

3. How many were recent post-secondary grads (within the last two years)? (Responses were from the 475 who said they hired in 2018)



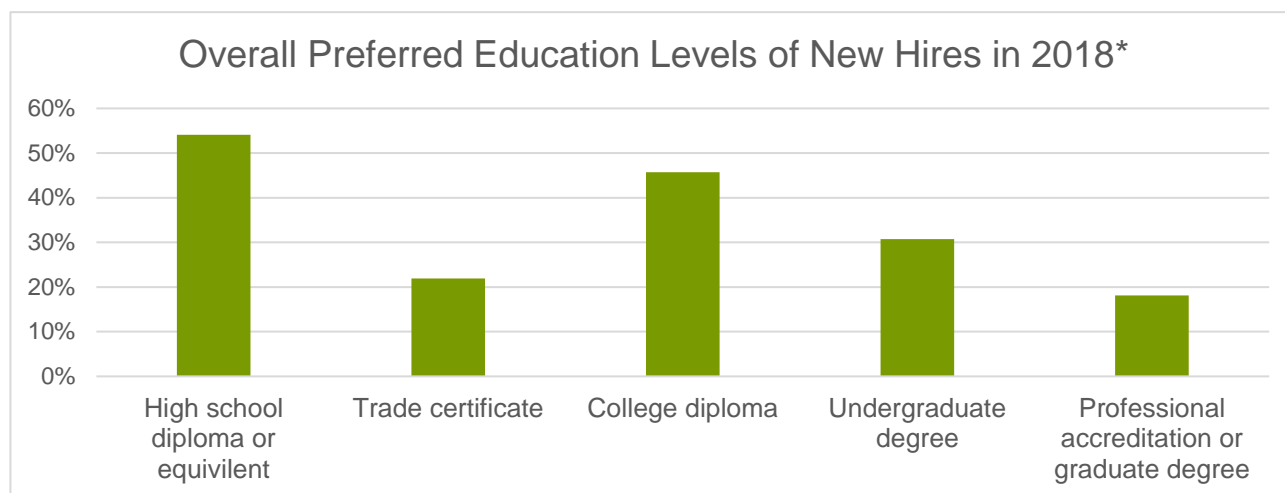
- **68%** of the respondents who hired in 2018 said that they hired recent post-secondary grads.
- Of those businesses who hired recent graduates in 2018 they hired a total of **2,941**.

4. Please list up to 3 jobs that you hired in 2018. (Responses were from the 324 who hired in 2018)

Sector	Top Positions Hired
Accommodation and food services	<ul style="list-style-type: none"> • Servers • Cooks (Line cook, prep cook) • Dishwashers
Administration and support, waste management and remediation	<ul style="list-style-type: none"> • General Labours • Security Guards • Drivers
Agriculture, forestry, fishing and hunting	<ul style="list-style-type: none"> • Sales • General labourers • Lab technicians
Arts, entertainment and recreation	<ul style="list-style-type: none"> • Customer Service
Construction	<ul style="list-style-type: none"> • Labourers • Project Managers/Coordinators • Operators
Educational services	<ul style="list-style-type: none"> • Teachers/instructors • Registered Early Childhood Educators (part-time & full-time)
Finance and insurance	<ul style="list-style-type: none"> • Administration • Bookkeepers
Health Care	<ul style="list-style-type: none"> • Personal Support Workers • Administration • Registered Practical Nurses

Information and cultural industries	<ul style="list-style-type: none"> • Software and web development • Sales
Management of companies and enterprises	<ul style="list-style-type: none"> • Software development • Sales • Hardware Engineers
Manufacturing	<ul style="list-style-type: none"> • General & Production Labourers • Machine operators • Welders/fitters
Other Services	<ul style="list-style-type: none"> • Employment Counsellors • Automotive Apprentice
Professional, scientific and technical services	<ul style="list-style-type: none"> • Designers (junior, intermediate, senior) • Software developers
Public administration	<ul style="list-style-type: none"> • Software developers • Administration
Retail	<ul style="list-style-type: none"> • Sales Associates • Cashiers • Customer service
Transportation and warehousing	<ul style="list-style-type: none"> • Mechanics & Apprentice (Truck & Coach or Truck & Trailer) • AZ drivers
Utilities	<ul style="list-style-type: none"> • Customer service • Technical Support • Operations/Engineering
Wholesale trade	<ul style="list-style-type: none"> • Inside and Outside sales • Warehouse Associates • Customer service

5. What is the preferred level of education required for new hires in the following occupation categories? (Responses were from the 475 businesses who hired in 2018)

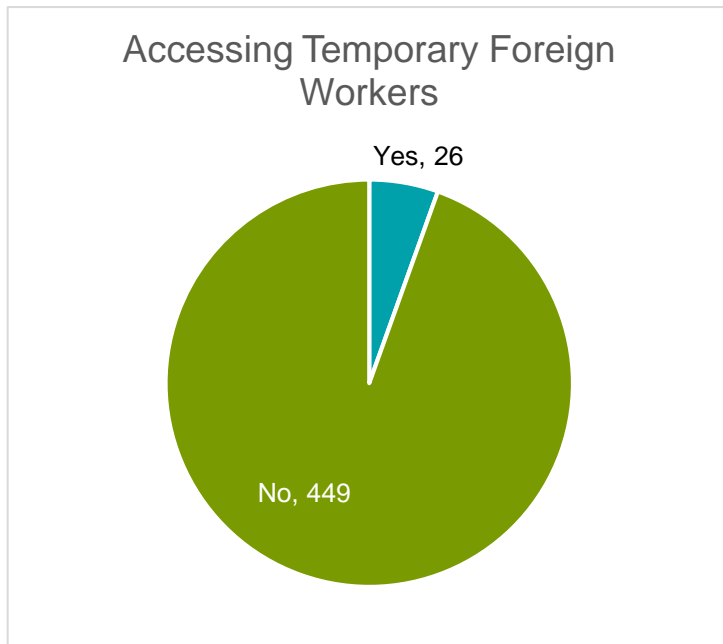


The percentage of employers who indicated overall preferred education level of new hires to be Trade Certificate increased from 17% to 22%, College Diploma increased from 40% to 46% and Undergraduate Degree increased from 25% to 31% between 2017 and 2018.

* Note: Respondents could select more than one required education level. The chart above shows that 54% of the employers do have positions that required only a High School Diploma. Those same businesses may also have other positions that require a higher level of education.

- **54%** of respondents hired positions in 2018 that required High School Diploma or equivalent.
- **22%** preferred new hires who have a Trade Certificate.
- **46%** of businesses preferred a College Diploma.
- **31%** of businesses preferred an Undergraduate Degree.
- **18%** required a Professional Accreditation or Graduate Degree.

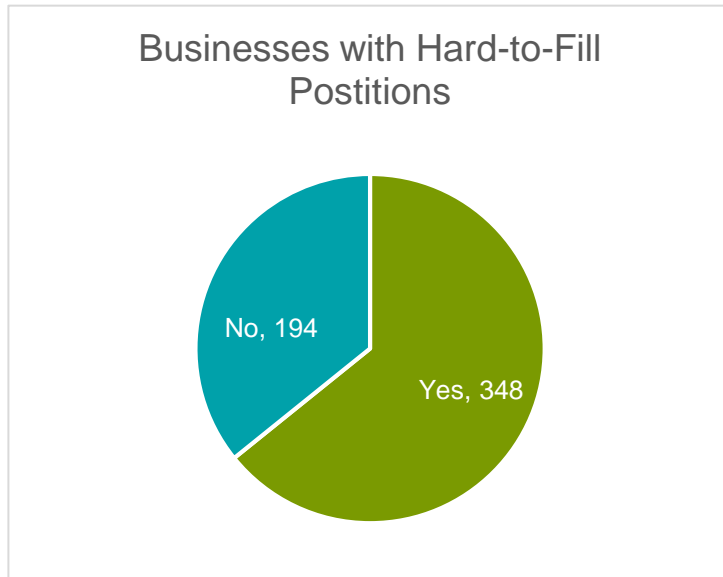
6. Are you accessing Temporary Foreign Workers? (Responses were from the 475 businesses who hired in 2018)



- **5%** of the respondents who hired in 2018, are accessing temporary foreign workers

Section D: Hard-to-Fill Positions

1. Were any of these positions hard-to-fill in the last 12 months? (Number of responses: 542)
Hard-to-fill positions are jobs for which the search for workers took longer than planned.



- **64%** of businesses indicated that they had positions that were hard-to-fill in 2018.

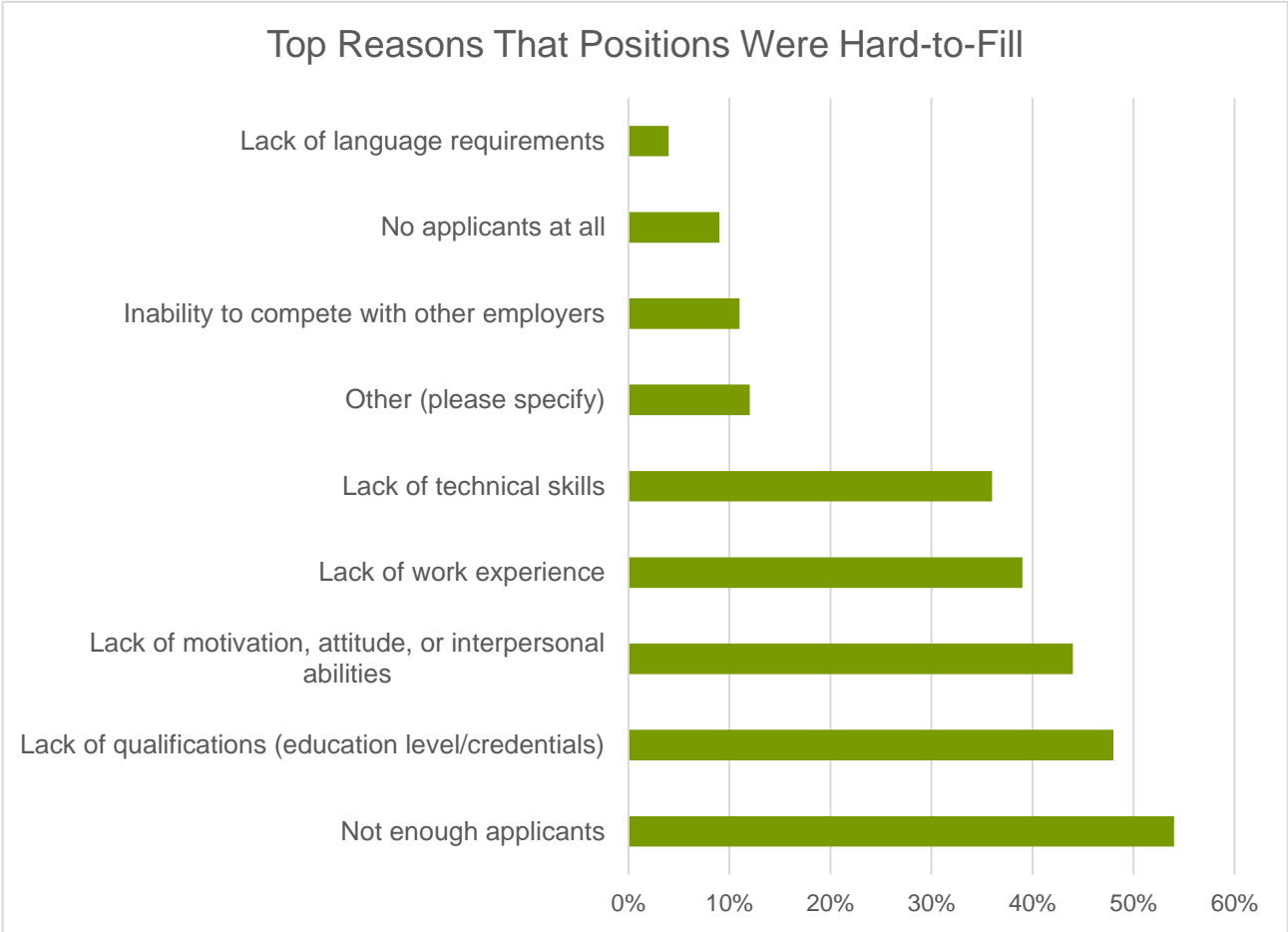
The percentage of respondents who had hard-to-fill positions has gradually increased over the past four years: 48% in 2015, 56% in 2016, 59% in 2017 and 64% in 2018.

Sector	Number of respondents	% with Hard-to-Fill positions
Manufacturing	111	80%
Accommodation and food services	15	80%
Administration and support, waste management and remediation services	9	78%
Construction	59	76%
Transportation and warehousing	12	75%
Agriculture, forestry, fishing and hunting	24	71%
Arts, entertainment and recreation	17	65%
Healthcare and social assistance	50	62%
Finance and insurance	19	58%
Educational services	23	57%
Other (please specify)	23	57%
Public administration	9	56%
Wholesale trade	18	56%
Information and cultural industries	11	55%
Other services (except public administration)	30	53%
Professional, scientific and technical services	68	50%
Retail trade	38	50%
Utilities	3	0%
Management of companies and enterprises	1	0%
Real estate and rental and leasing	2	0%

2. Please indicate up to three jobs you found hard-to-fill. (Number of responses: 335 businesses who indicated they had hard-to-fill positions and completed the question)

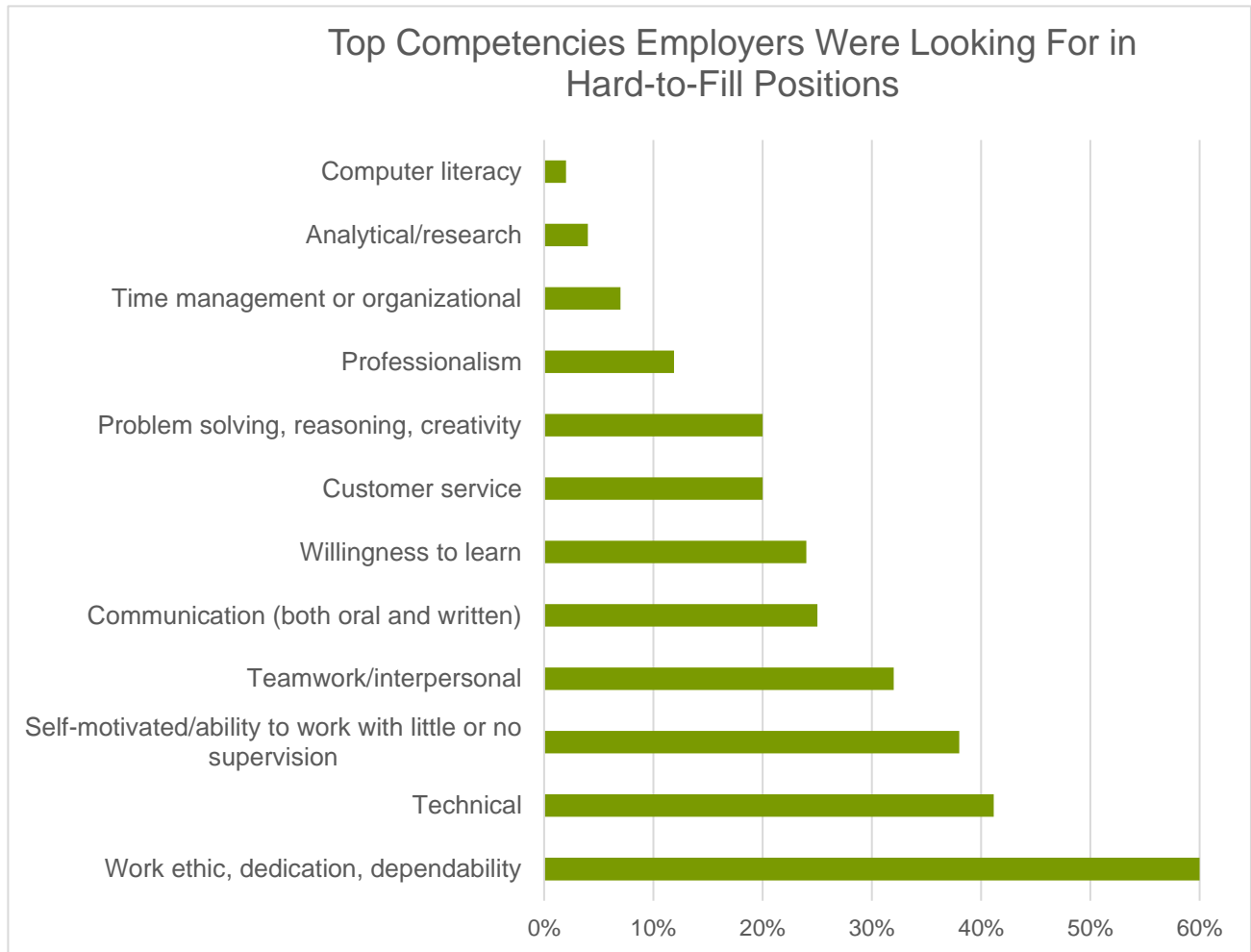
Sector	Hard-to-Fill Positions
Accommodation and food services	<ul style="list-style-type: none"> • Cooks • Dishwashers
Administration, support, waste management, remediation	<ul style="list-style-type: none"> • Labourers • Drivers
Agriculture, forestry, fishing and hunting	<ul style="list-style-type: none"> • Drivers • Sales
Construction	<ul style="list-style-type: none"> • General Labourers • Equipment Operators • Installer
Educational services	<ul style="list-style-type: none"> • Registered Early Childhood Educators (part-time, contract) • French Teachers
Healthcare and social assistance	<ul style="list-style-type: none"> • Personal Support Workers • Direct Support Professionals (full-time, part-time, and night awake)
Information and cultural industries	<ul style="list-style-type: none"> • Software Developer
Manufacturing	<ul style="list-style-type: none"> • General Labourers • Production Workers • Welders/Fitters
Other services (except public administration)	<ul style="list-style-type: none"> • Automotive Technicians • Fundraising
Professional, scientific and technical services	<ul style="list-style-type: none"> • Project Managers • Engineers • Bookkeepers
Retail trade	<ul style="list-style-type: none"> • Sales • Reception • Delivery Drivers and Warehouse Workers
Transportation and warehousing	<ul style="list-style-type: none"> • 310T Mechanics and Apprentice (truck and trailer) • AZ Drivers • Dispatcher
Wholesale trade	<ul style="list-style-type: none"> • Truck Driver AZ • Inside Sales • Customer Service

3. Using the list below, select up to three reasons why the positions were hard-to-fill:
 (Number of responses: 348 businesses who indicated they had hard-to-fill positions).



• **54%** of respondents listed not enough applicants as a top reason that jobs were hard-to-fill followed by lack of qualifications (**48%**), Lack of motivation, attitude, or interpersonal abilities (**44%**) and Lack of work experience (**39%**).

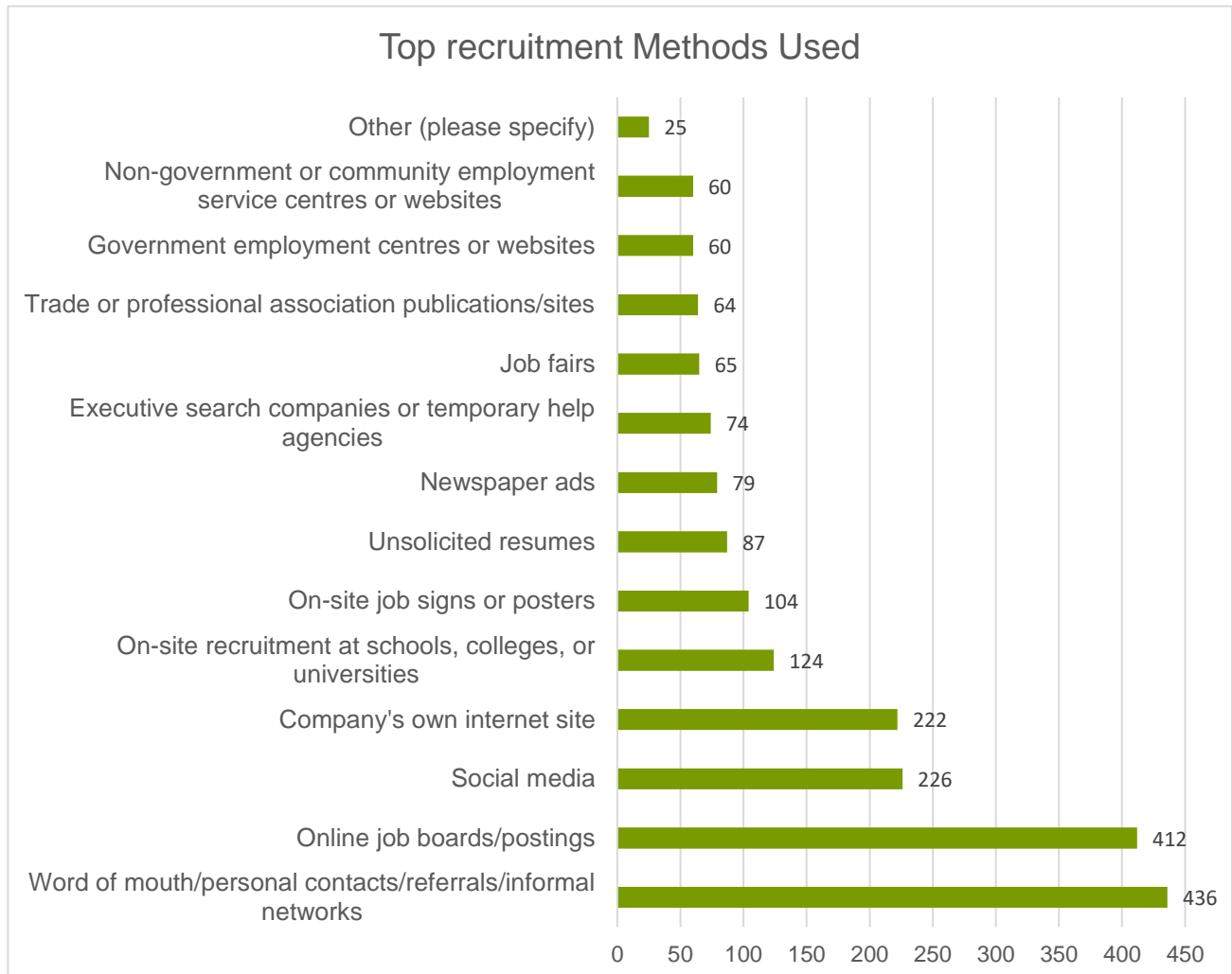
4. Please select up to 3 of the top competencies you are looking for in hard-to-fill positions:
(Number of responses: 348 businesses who indicated they had hard-to-fill positions).



- **60%** of respondents indicated that the top competency that they were looking for in candidates was work ethic, dedication and dependability.

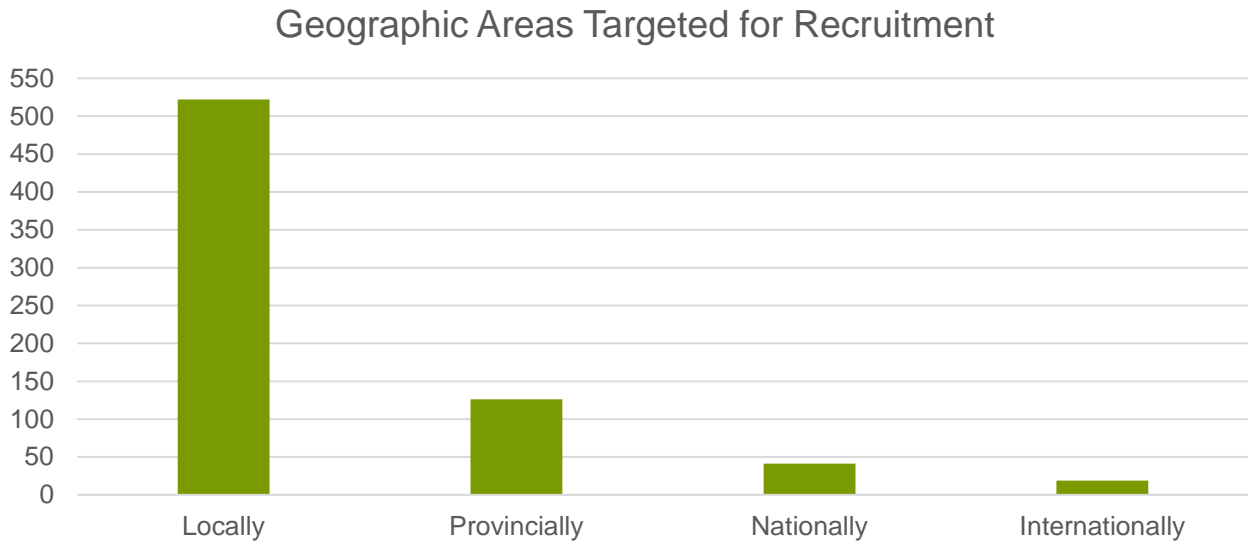
Section E: Recruitment

1. Please select up to five recruitment methods you use to hire: (*Number of responses: 535*)



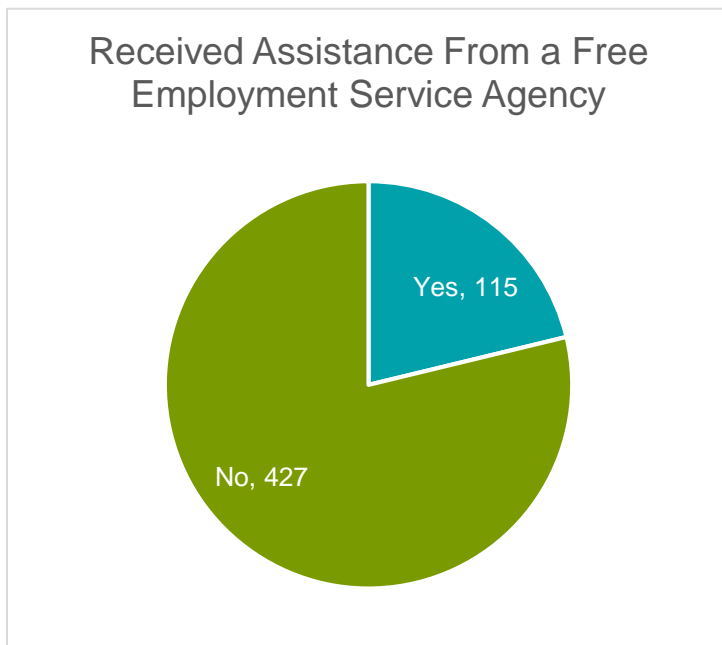
- **81%** of respondents indicated that word of mouth, personal contacts, referrals and informal networks was one of their top 5 recruitment methods.
- **77%** use on-line job boards/postings.

2. Which of the following geographic areas were targeted for recruitment? (Number of responses: 542)



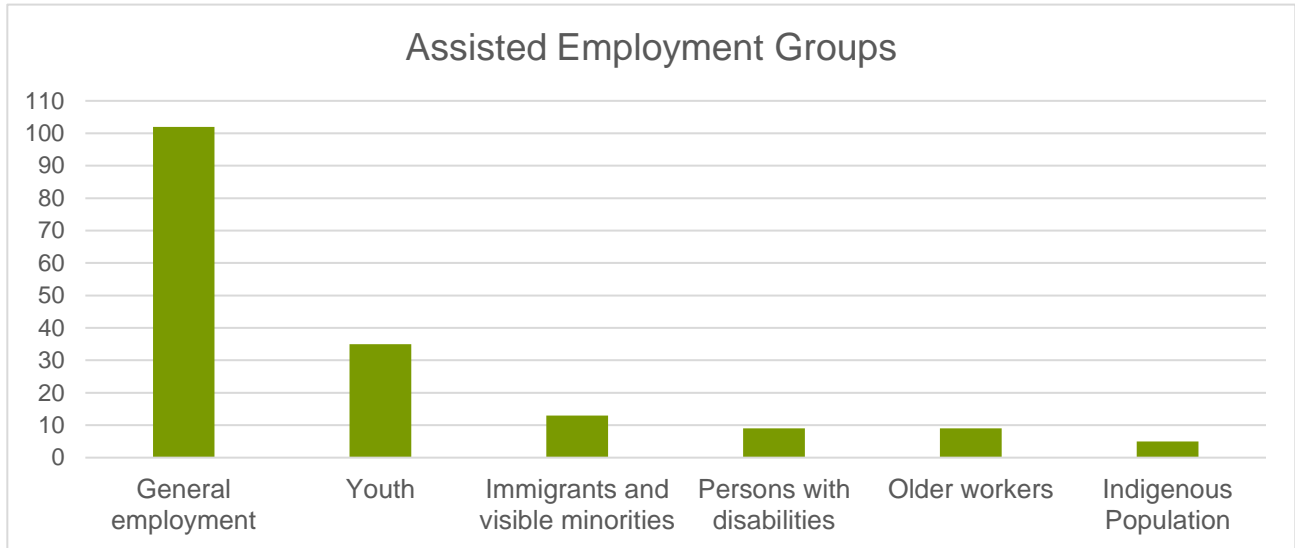
- **96%** of respondents targeted locally for recruitment.

3. Did you receive any assistance from a free employment service agency? (Number of responses: 542)



- **21%** of respondents received help from a free employment service agency for recruitment.

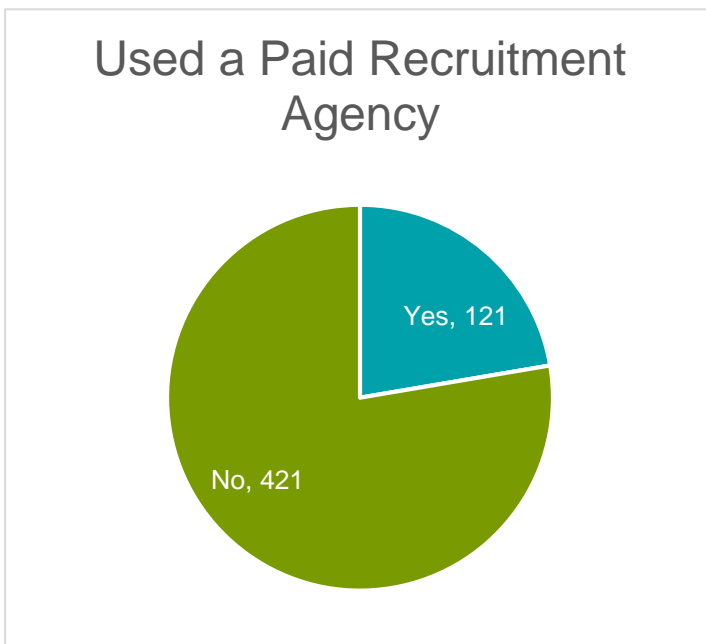
4. Select for which groups you received assistance from a free employment agency. (Number of responses: 112 businesses who said “yes” to receiving free employment services for recruitment)



- **89%** (102 of the 112 businesses who received assistance from free employment agencies) had assistance related to general employment
- **30%** had assistance related to hiring youth
- **11%** had assistance with hiring immigrants and visible minorities

The percentage of businesses who received general employment assistance from free employment agencies increased from 83% to 89%

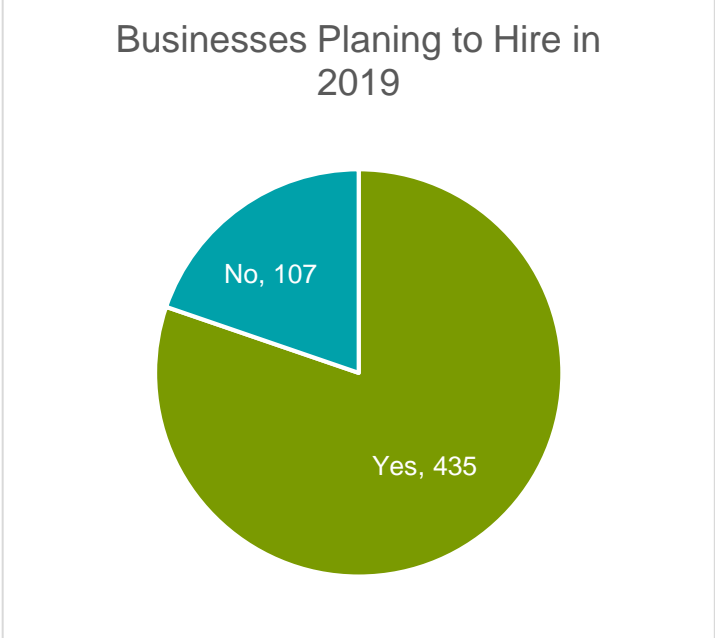
5. Did you use a paid recruitment agency? (Number of responses: 542)



- **22%** of respondents used a paid recruitment agency.

Section F: Planned Hires

1. Do you plan on hiring anyone over the next 12 months? (Number of responses: 542)



• **80%** of respondents plan to hire in 2019.

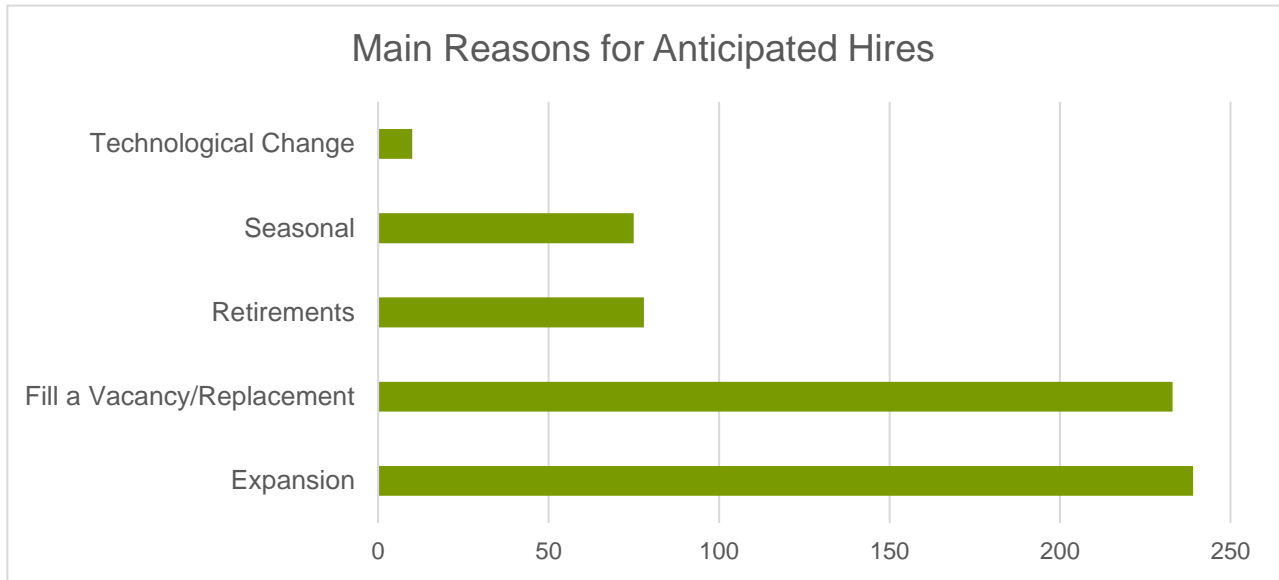
2. How many new hires do you anticipate in 2019? (Number of responses: 328 businesses who plan to hire in 2019 and completed the question)

Sector	Total	Full-time	Part-time	Contract	Seasonal	Paid Co-op
Manufacturing	1,494	1,187	103	12	142	50
Healthcare and social assistance	1,096	196	597	29	36	19
Construction	758	357	4	7	376	14
Educational services	675	178	255	24	217	1
Transportation and warehousing	635	587	32	5	5	6
Other services (except public administration)	548	129	212	3	204	-
Arts, entertainment and recreation	494	9	24	9	447	5
Public administration	443	49	170	-	210	14
Professional, scientific and technical services	293	213	15	8	14	43
Accommodation and food services	274	114	147	-	13	-
Retail trade	180	52	82	1	44	1
Administration and support, waste management and remediation services	154	81	70	-	3	-
Agriculture, forestry, fishing and hunting	142	91	18	3	22	8
Other (please specify)	123	56	8	-	47	12
Wholesale trade	116	101	10	2	3	-
Information and cultural industries	72	66	1	2	-	3
Finance and insurance	24	19	4	1	-	-
Utilities	11	6	-	-	-	5
Management of companies and enterprises	11	11	-	-	-	-
Real estate and rental and leasing	3	3	-	-	-	-
Total	7,546	3,505	1,752	106	1,783	181

The number of positions businesses are planning to hire increased from 6,699 positions in 2018 to 7,546 positions in 2019.

- Responding employers plan to hire **7,546** positions in 2019.
- Most of the anticipated hires are in the Manufacturing, Health Care and Social Services, and Construction.

3. Please select the main reasons you anticipate hiring for the following occupational groups over the next 12 months? (Number of responses: 435 of the businesses who said they anticipated hiring in 2019)



- **55%** of the business who plan to hire said that one of the main reasons was due to expansions.
- **54%** of the business who plan to hire said that one of the main reasons was due to filling a vacancy/replacement

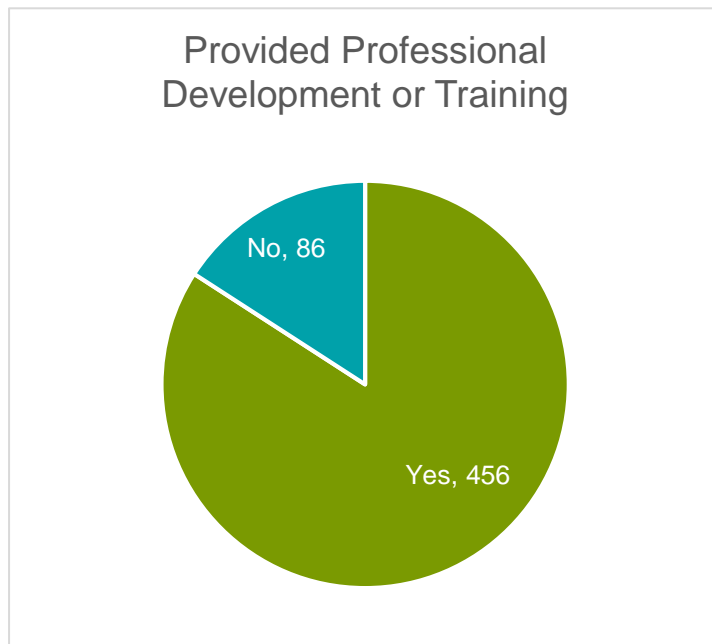
Section G: Training

1. How do you rate the availability of qualified workers in your area? (Number of responses: 542)



- **65%** of respondents rated the availability of qualified workers as fair or poor.

2. Was your organization able to provide or support professional development or training opportunities for your employees last year? (Number of responses: 542)



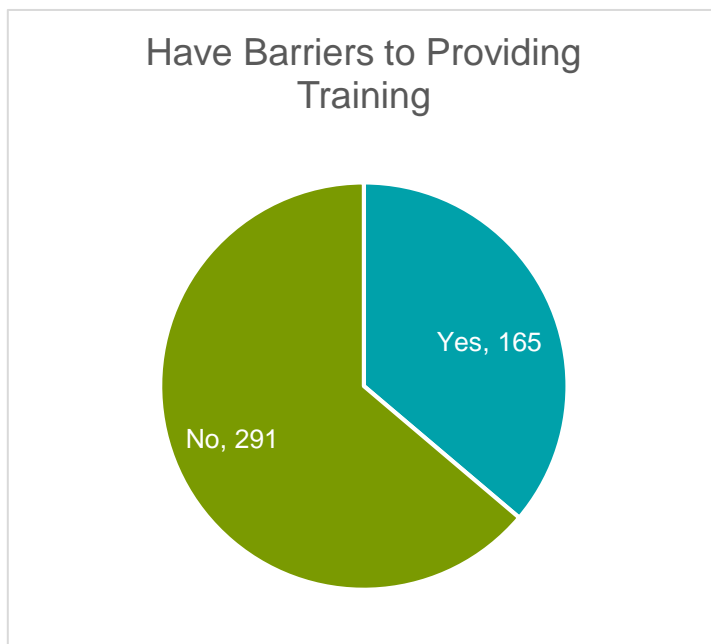
- **84%** of respondents provided professional development or training opportunities to their workers.

3. Please indicate how you support training/professional development opportunities.
(Number of responses: 456 businesses who provide training opportunities)



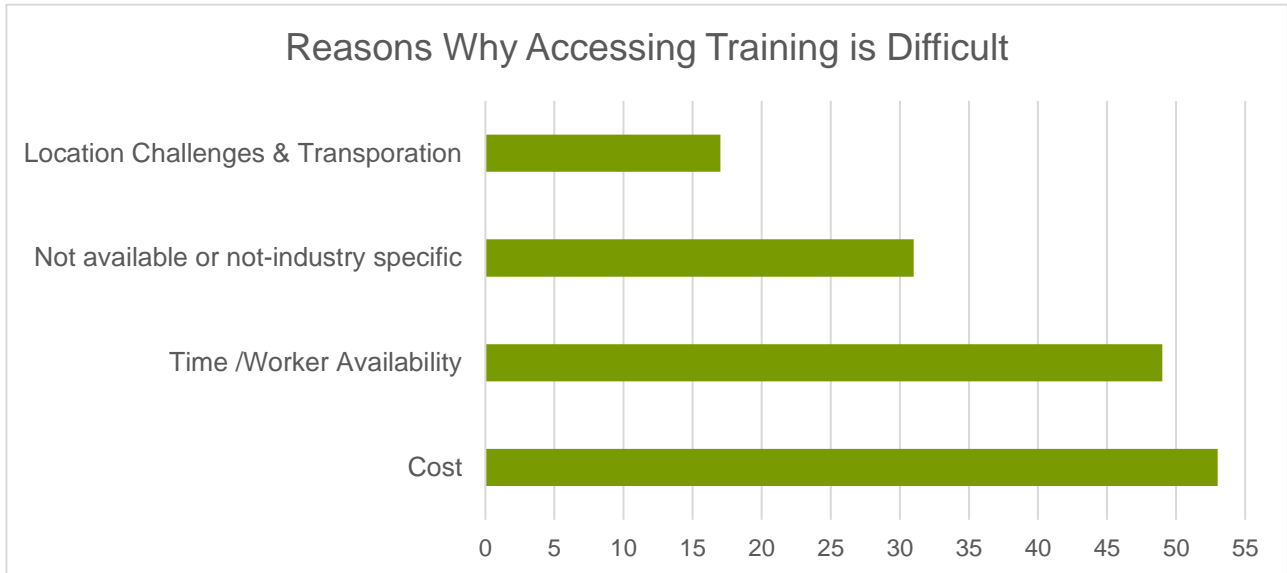
- **75%** of respondents who provided professional development/training did so by funding it (fully or partially) and **65%** provided internal training.

4. Although you were able to support training opportunities, were there also challenges or barriers to your employees receiving training? *(Number of responses: 456 businesses who provide training opportunities)*

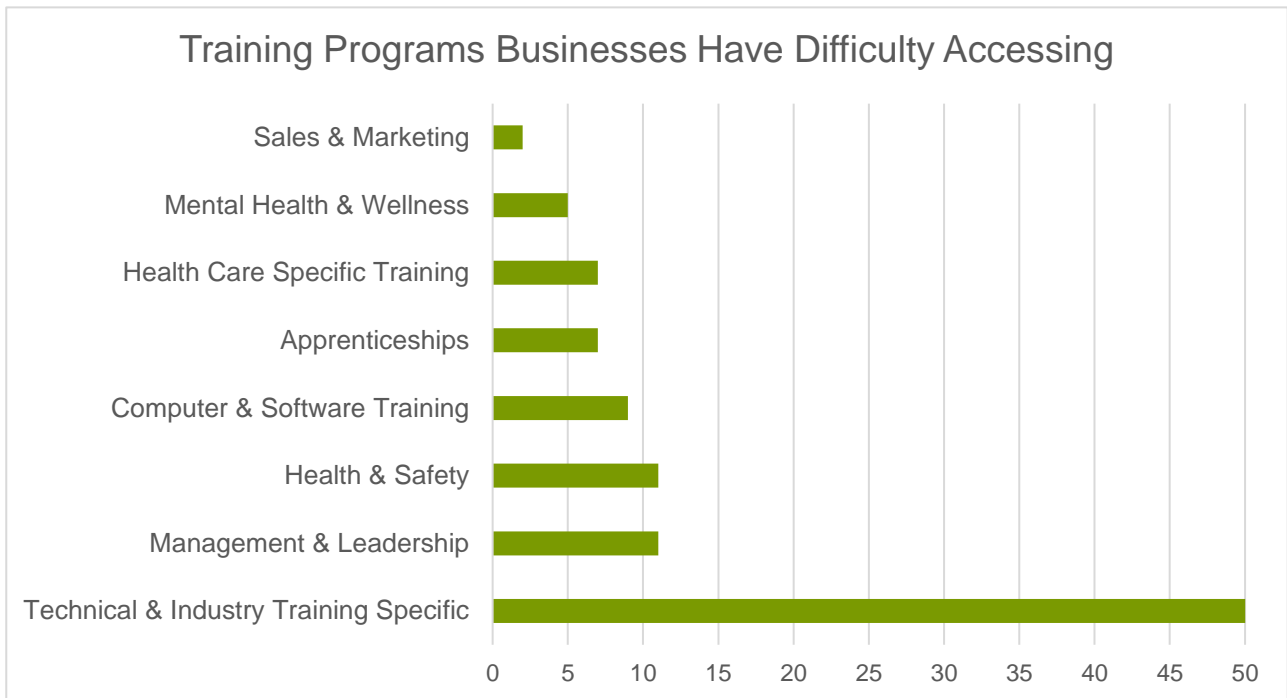


- **36%** of business who provide training did have some barriers to training and professional development.

5. What training programs do you have difficulty accessing and why (please be specific)?
 (Number of responses: 148 businesses who have barriers to training and completed the question)

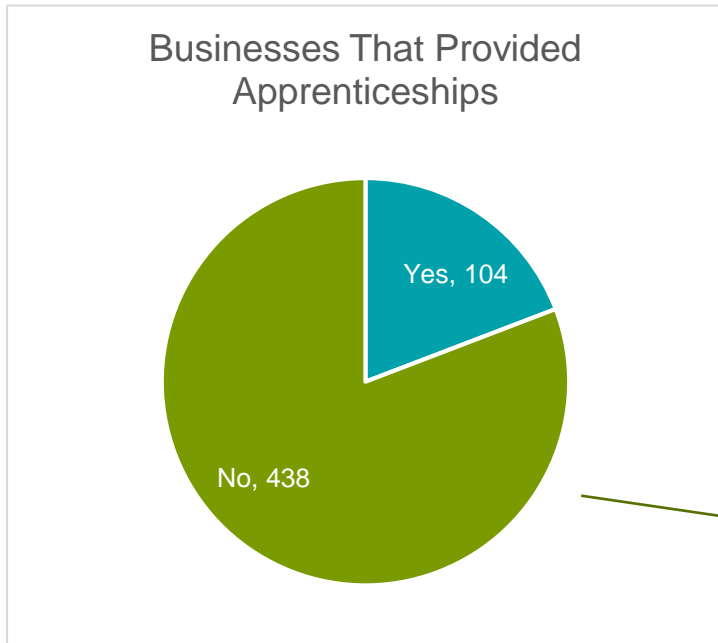


- The greatest barriers to providing training and education were cost and the time commitment and worker availability.
- 19 employers noted low employee interest in training as one of the reasons why completing training is difficult



- Most businesses who are having difficulty accessing training stated that they required specific industry or technical training.

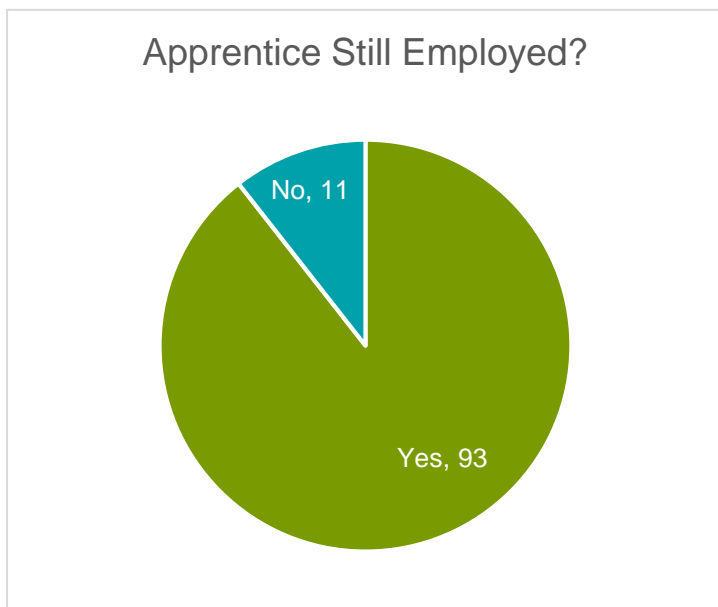
5. Did your organization provide any apprenticeship training in the last 12 months? (Number of responses: 542)



- Only **19%** of respondents provided apprenticeship training in the last 12 months.

The percentage of businesses who provided apprenticeships decreased from 24% in 2017 to 19% in 2018.

6. Is the apprentice still in your employ? (Number of responses: 104 businesses who provided apprenticeships)



- **89%** of businesses that trained apprentices in 2018 still have the apprentice in their employ.

7. Please identify the trade(s) that you provided an apprenticeship for: (Number of responses: 99):

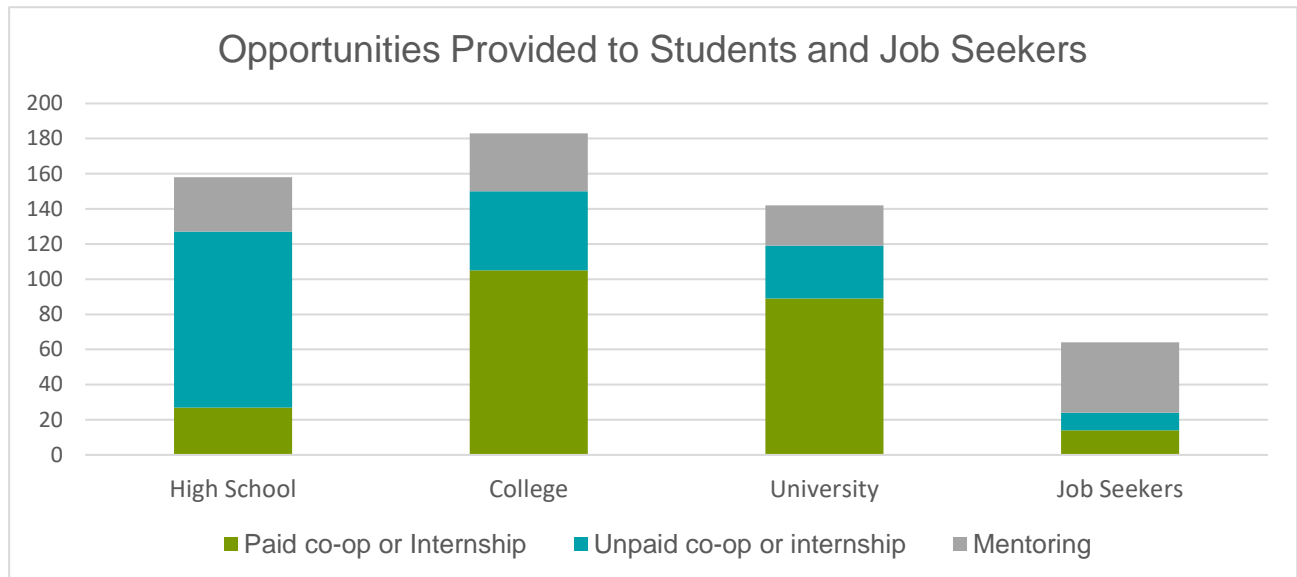
Most Common Apprenticeships *	Number of Apprentices in 2018
Electrician**	18
Millwright	13
Machinist	12
Tool & Die	10
Truck and Coach Technician (310)	9
Automotive Technician	8
Heavy Equipment Operator	5
Carpenter	4
Auto Body & Collision Damage Repairer (310B and 310Q)	4
Industrial Mill Wright	4
Chef	3
Industrial Electrician	3
Welder	3
Developmental Services Worker	2
Early Childhood Educator	2
Automatic Sprinkler and Fire Protection	2
Brick and Stone Masonry	2
Registered Early Childhood Educator	2
Refrigeration	2
Mechanic	2
Maintenance Mechanic	2
Metal Fabrication	2

* Note: 29 other apprenticeship types were identified.

** Note: Respondents did not specify the type of electrician

- The most common apprenticeships provided by respondents in 2018 were electricians and millwrights.
- Some employers provided more than one type of apprenticeship.

9. Do you provide any of the following opportunities to students or jobseekers? (Number of responses: 328)

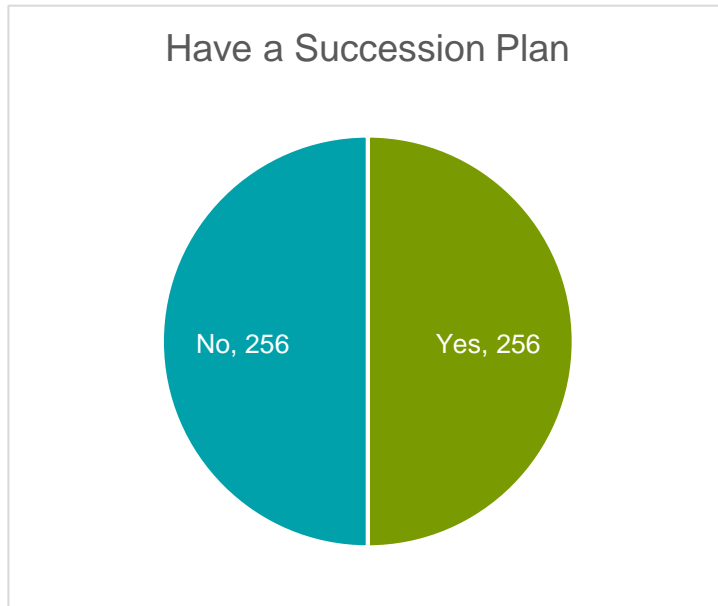


• Of the 328 respondents who said they provided opportunities to students and job seekers:

- **56%** provide opportunities for college students.
- **48%** provide opportunities for high school students.
- **43%** provide opportunities for University students.
- **20%** provide opportunities for job seekers

Section H: Succession Planning

1. Does your business have a succession plan? (Number of responses: 512)

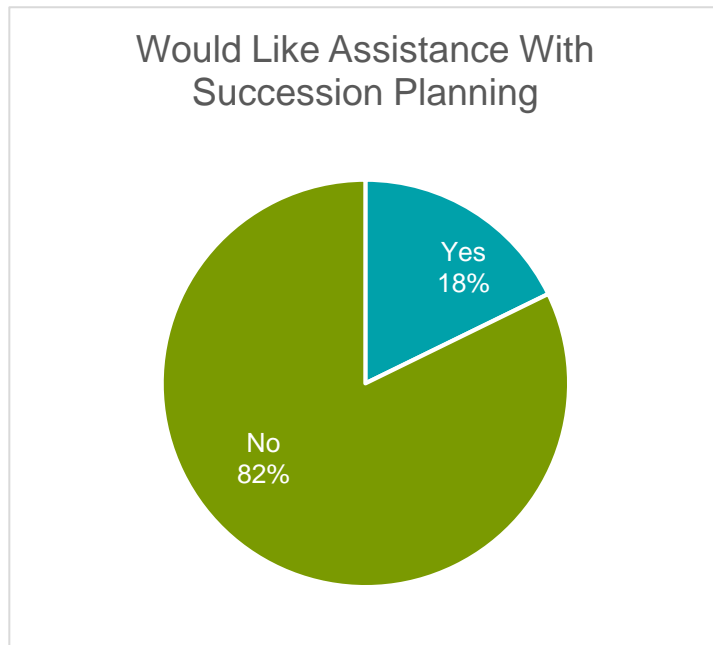


- 50% of responding businesses have a succession plan.

The percentage of responding businesses have a succession plan decreased from 55% in 2017 to 50% in 2018.

Sector	Number of Responses	% with a Succession Plan
Finance and insurance	18	72%
Wholesale trade	17	71%
Educational services	23	65%
Manufacturing	105	58%
Construction	57	51%
Public administration	8	50%
Arts, entertainment and recreation	16	50%
Accommodation and food services	14	50%
Transportation and warehousing	10	50%
Real estate and rental and leasing	2	50%
Healthcare and social assistance	47	49%
Professional, scientific and technical services	68	46%
Agriculture, forestry, fishing and hunting	22	45%
Information and cultural industries	11	45%
Other (please specify)	20	45%
Retail trade	34	35%
Administration and support, waste management and remediation services	9	33%
Utilities	3	33%
Other services (except public administration)	27	26%
Management of companies and enterprises	1	0%
Mining, quarrying and oil and gas extraction	0	0%

2. Would you like to request assistance from experts on succession planning? (e.g. Economic development departments, Small Business Centre, Community Futures, etc.).
(Number of responses: 259 business who completed this question)

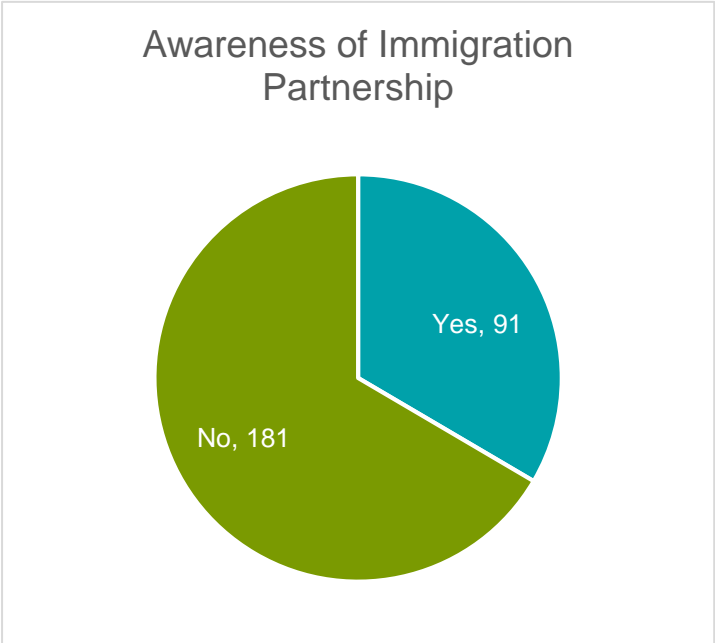


- **46** businesses expressed interest in receiving assistance.

The number of responding businesses who expressed interest in receiving assistance with succession planning increased from 35 businesses in 2017 to 46 businesses in 2018.

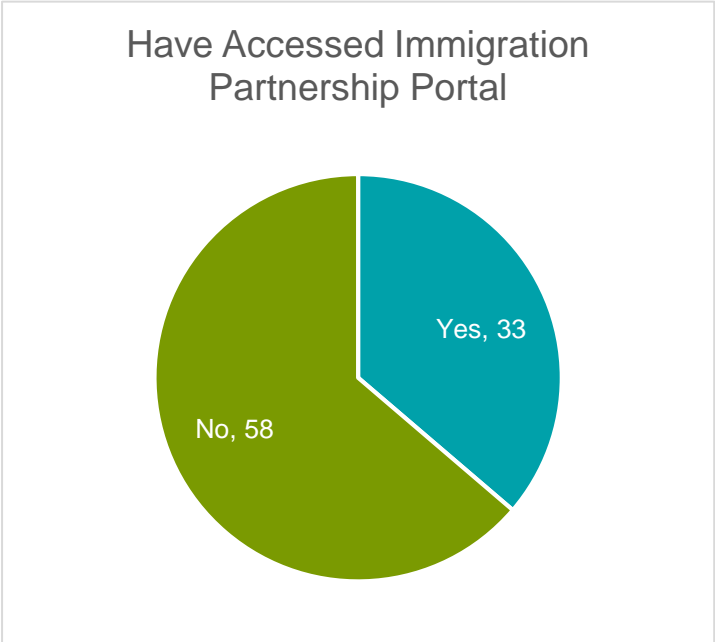
Section I: Immigration

1. Are you aware of the Immigration Partnership in your community? (Number of responses: 272)



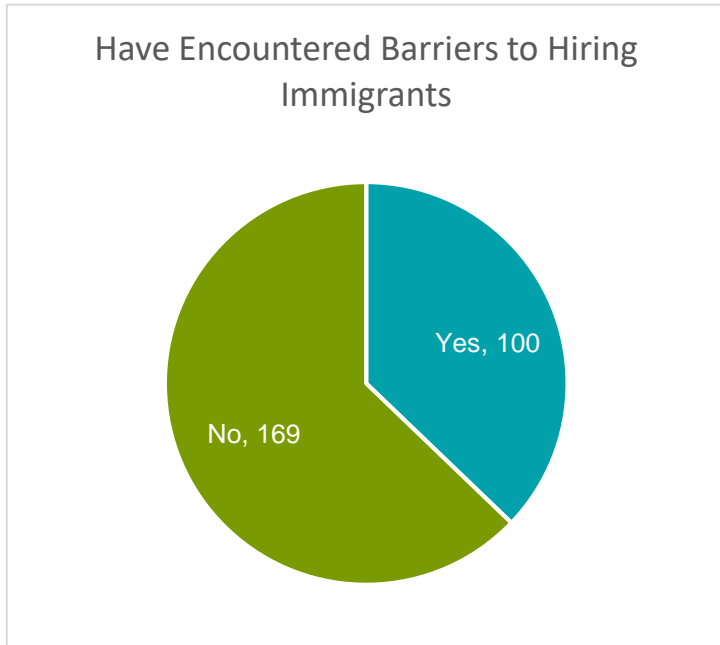
• **33%** of responding businesses are aware of the Immigration Partnership in their communities.

2. Have you ever accessed the Immigration Partnership's portal for finding immigrant employment information? (Number of responses: 91 businesses who are aware of Immigration Partnerships)



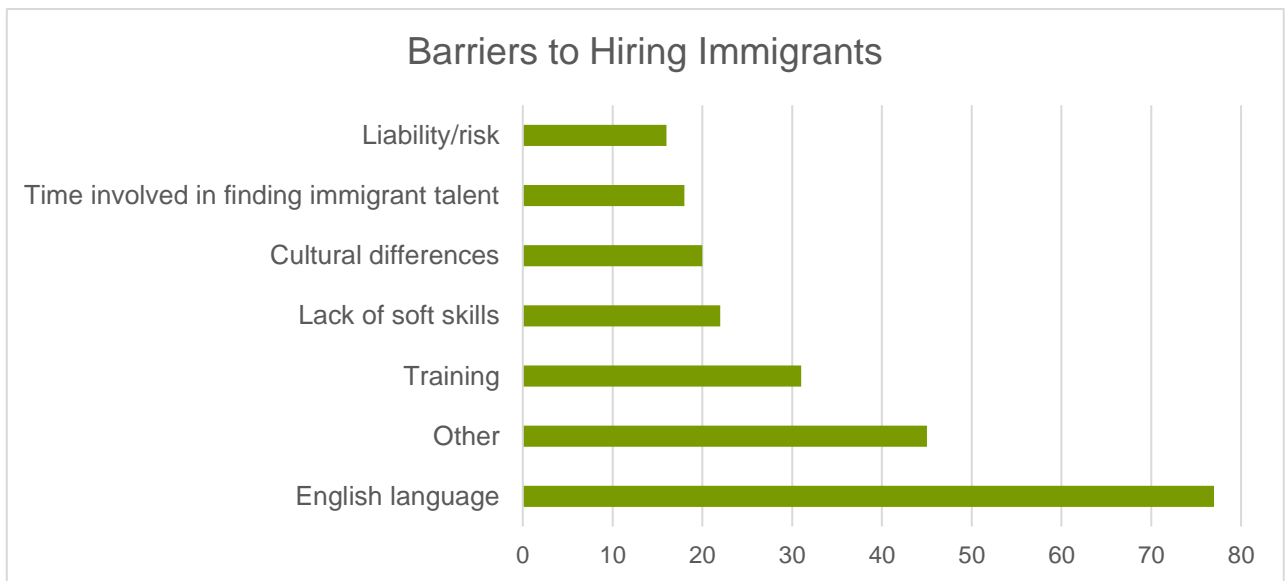
• **36%** of the businesses who are aware of the Immigration Partnership in their community have accessed their portal for finding immigrant employment information.

3. Have you encountered barriers to hiring immigrants? (Number of responses: 269)



• **37%** of responding businesses have encountered barriers to hiring immigrants.

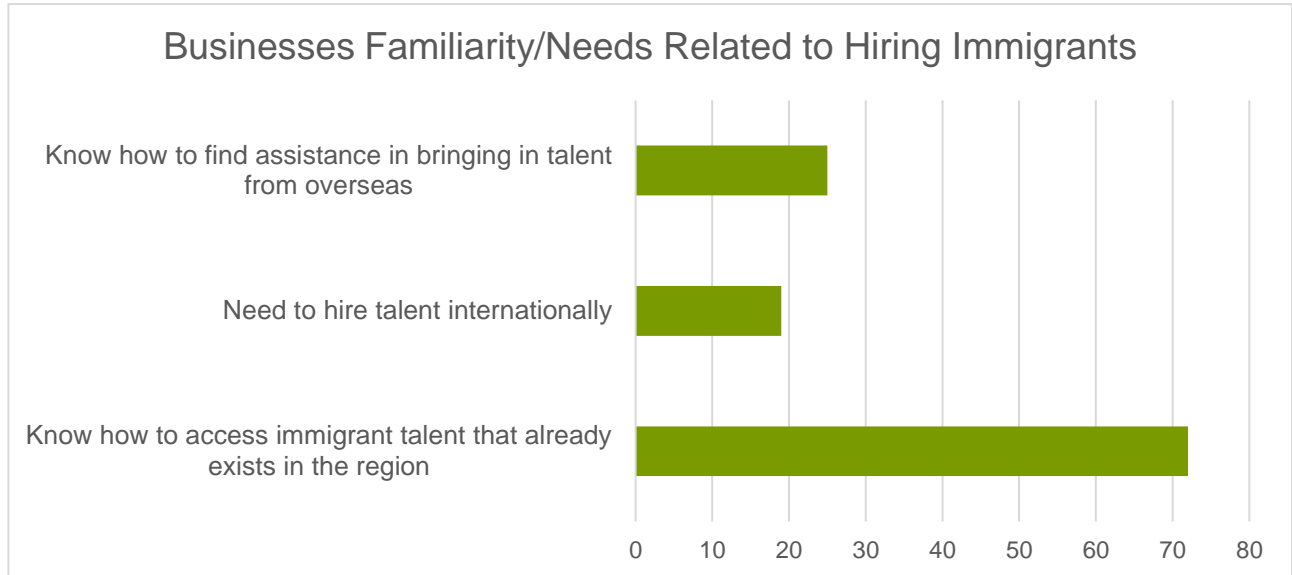
4. Which Barriers have you encountered? (Number of responses: 100 businesses who encountered barriers to hiring immigrants)



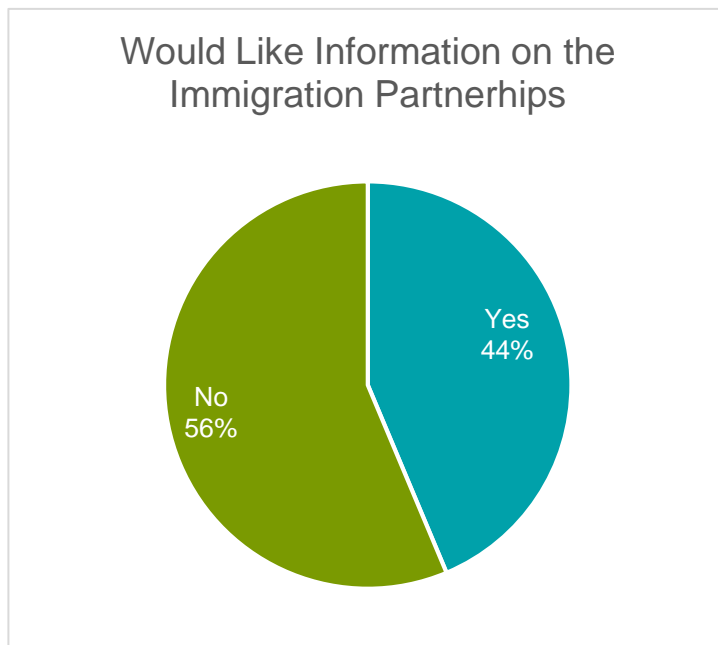
The percentage of respondents who indicated English language skills as one of the barriers to hiring immigrants decreased from 85% to 77% in 2017 to 2018.

• **77%** of businesses who have barriers to hiring immigrants indicated that English language skills was a barrier.

5. Do you? (Number of responses: 100 businesses who encountered barriers to hiring immigrants)
 - a. Know how to access immigrant talent that already exists in the region
 - b. Need to hire talent internationally
 - c. Know how to find assistance in bringing in talent from overseas



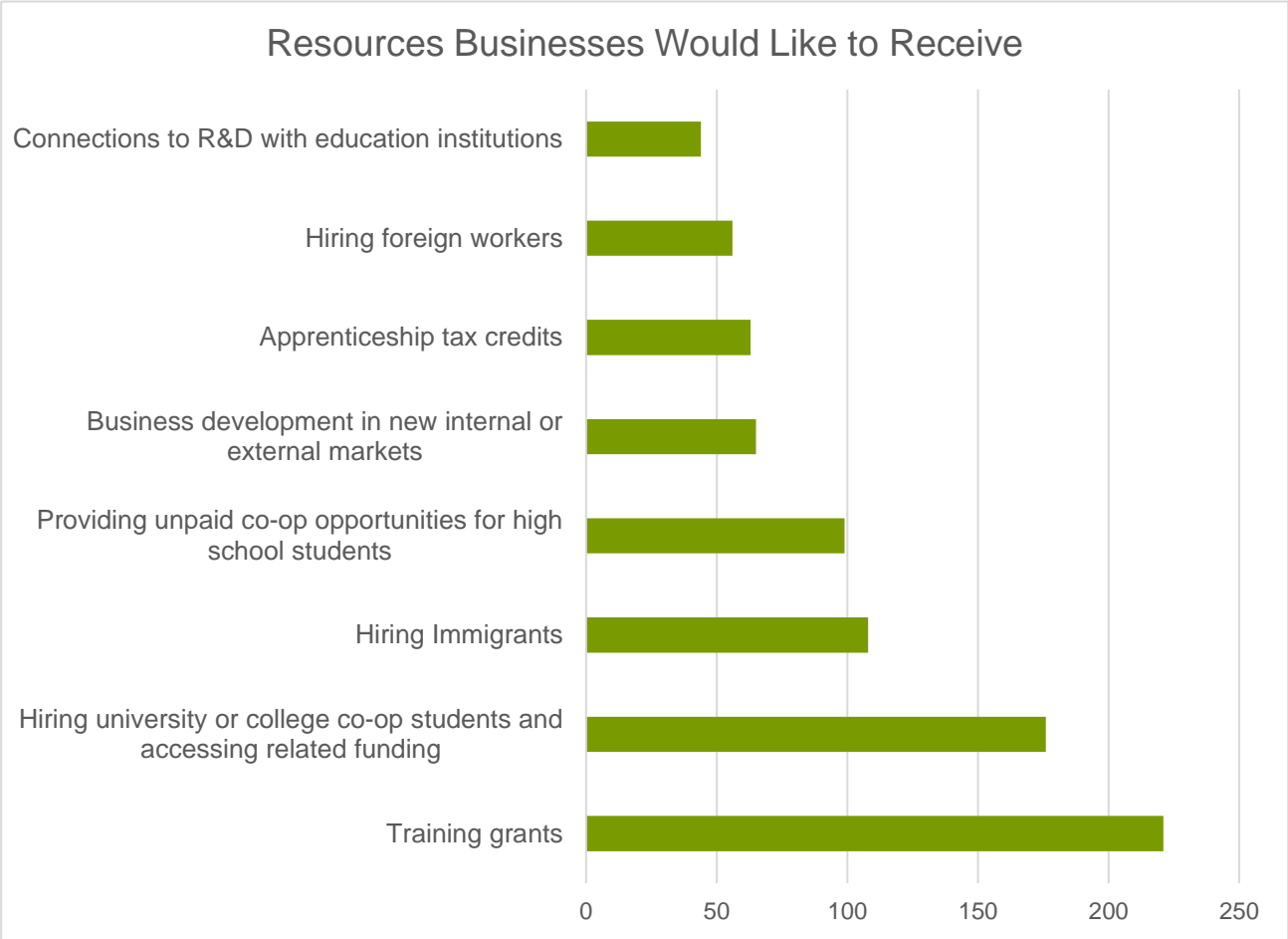
6. Would you like information on the work of the Local Immigration Partnerships of Waterloo Region and Guelph Wellington. (Number of responses: 261)



- **114** businesses would like information on the Immigration Partnerships.

Section J: Business Resources

1. The Planning Board works closely with over 30 Partners who provide a variety of direct and indirect business and workforce development support. Please indicate if you would like to receive information or assistance in any of the following areas. (Number of responses: 316)



- **70%** of responding businesses are seeking information on training grants available to them.
- **56%** of responding businesses are seeking information on hiring university or college co-op students and accessing related funding.