



Sectorial study on human resources requirements in the Québec maritime transport industry

HIGHLIGHTS

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1 An industry that employs more than 15 000 people in Québec

- **The Québec maritime industry**, as defined in this study, **comprises 332 companies**.
 - **Close to half** of these companies specialize in **marine services** (46%), **one company out of five** (20%) cites **cruiers/excursions** as its main activity and **16%** of these companies are active in the **port services** sector.
 - The other companies are almost equally distributed among ferries and river shuttles (7%), companies specializing in goods transport (5%) and ports and port authorities (5%).
- **40% of the industry's companies** (133 out of 332), primarily ship operators, **employ navigating personnel**, while **90%** (298 out of 332) **employ non-navigating personnel**.
- In **2019**, an estimated total of **15 597 people worked in the Québec maritime industry**. More specifically, the industry had 5 541 navigating employees, 9 446 non-navigating employees, 500 security services employees (territory and activity surveillance) and 110 Transport Canada employees working in the maritime sector.
- It is also estimated that the maritime industry supports **8 240 indirect jobs**, for a total of **23 837 direct and indirect jobs**.
- Although the industry comprises a great many companies that provide marine services and cruises/excursions, these two activity sectors employ only 14% and 10% respectively of the industry's human resources. **Port services** and **companies specializing in goods transport** are the activity sectors **employing the highest number of individuals**. More specifically:
 - Port services employ 4 482 people, slightly less than one-third (30%) of the industry's human resources. This pool of employees includes 47% of the industry's non-navigating personnel (4 445 out of 9 446 non-navigating employees).
 - Goods transport companies employ 29% of the industry's human resources (4 407 individuals) and more than half (54%) of its navigating personnel (2 971 out of 5 541 navigating employees).
- **Companies whose head office is located in the Québec City/Capitale Nationale area** employ **close to half (45%) of the industry's employees**, while those whose head office is in **Montréal** employ **more than one-third of the industry's human resources (35%)**.

2 Current portrait of navigating personnel: 5 541 navigating employees in the industry in 2019 of which almost one in five works as a deckhand

- Among the **133 companies that employ navigating personnel**, **87%** hire employees working **on the deck** while just over half (45%) employ occupations working in the engine room.
 - Within these companies, **the most widespread occupations are masters, limited** (52% hire employees in this job category) and **deckhands** (46%).
 - The engine room-related occupation most often found in companies is small vessel machine operators (27% of the companies with navigating personnel hire for this occupation).
- **Deckhands** represent close to **one out of five navigating employees** in the industry (1 036 out of 5 541 employees). **Passenger services assistants** (12%, 665 employees) and **masters with STCW certification** (11%, 611 employees) are the two other occupations representing the **highest number of navigating employees**.
- **The profile of navigating employees** is as follows:
 - **The very great majority** of navigating employees are **men**, especially in **engine room** occupations (96% are men). Among navigating personnel, the only occupation where we see **more women** than men is **passenger services assistant** (65% are women).
 - **Three-quarters** (77%) of **engine room employees** have **permanent positions**, a proportion that is only **48% for deck occupations**. Note that we see a **larger proportion of permanent employees** among **masters with STCW certification** (92%), **STCW watchkeeping mates** (69%), **bridge watchmen** (69%) and **masters, domestic** (60%).
 - The **average age** of navigating employees is **44 years**.
 - **Almost all** (98%) navigating employees are **Canadian citizens**.

3 Current portrait of non-navigating personnel: 9 446 non-navigating employees in the industry in 2019 of which more than one-third are longshoremen or stevedores

- Among the **298 companies with non-navigating personnel**, almost all (94%) hire **administrative employees**, while **less than one-third (30%)** have operations/cargo handling employees.
 - Within these companies, **the most widespread occupations** are those linked to **administrative support** (77% hire employees in this job category), **human resources managers** (74%) and **other managers and professionals** (64%).
 - **More big companies** hire for occupations linked to **operations/cargo handling**. More than three-quarters of big companies with non-navigating personnel hire for such occupations, a proportion that is 27% in medium-sized companies and 17% in small companies.
- Although **only 12% of companies** with non-navigating personnel **employ longshoremen/stevedores** (primarily port services companies), **this occupation represents 37% of the marine industry's non-navigating employees** (3 492 out of 9 446 non-navigating employees).
 - The two other occupations that represent the largest number of non-navigating employees are: non-human-resources managers and professionals (1 781 employees, representing 19% of non-navigating employees) and administrative support staff (1 448 employees, representing 15%).
- **The profile of non-navigating employees** is as follows:
 - **Operations/cargo handling** occupations are **primarily held by men (92%)**, while we see **an equal number of men and women in administrative positions**. However, there are **more women in administrative support jobs (63%)** and **more women human resources managers (53%)**.
 - **A very large percentage (84%) of administrative employees** have **permanent jobs**, a proportion that is **only 68%** for **operations/cargo handling occupations**. We also see a very high proportion of permanent jobs among operations/cargo handling management personnel (97%) and maintenance and repair personnel (91%).
 - The **average age** of non-navigating employees is **43 years**. Only the occupation of safety and security personnel differs, with an average age of 36 years.
 - Almost all (99%) of the industry's non-navigating employees are **Canadian citizens**.

4 Hiring of navigating personnel: 3 165 hires are foreseen over the next three years; 75% of companies say they have difficulties hiring navigating personnel

- Among the 133 companies that currently employ navigating personnel, **79% foresee hiring navigating personnel in Québec over the next three years**. More specifically, 76% plan to hire for at least one occupation working on the deck and 36% plan to hire for at least one occupation linked to the engine room.
 - The industry expects to **hire employees for each navigating personnel occupation** over the next three years. **The occupations that will be most in demand** in companies that currently employ navigating personnel are: **deckhand** (35% of these companies plan to hire for this occupation), **master, limited** (33%) and **small vessel operator SVOP** (27%).
- In terms of number of employees, **companies** currently employing navigating personnel **plan to hire 3 165 navigating employees over the next three years, slightly more than one-third** of which (1 247 employees, or 39%) are expected to be hired **over the coming year**.
 - The **occupations for which the most employees will possibly be hired** are **deckhand** (748 hires expected) and **passenger services assistant** (650 hires), followed by **bridge watchman** (202 hires), **engine room rating** (198 hires), **ship's cook** (187 hires), **fourth-class engineer** (171 hires), **master with STCW certification** (162 hires) and **small vessel operator SVOP** (145 hires).
- Companies foresee that **66% of the navigating employees they hire** over the next three years **will have temporary positions** and **34% will have permanent jobs**. Note that **60% of engine room employees** will be hired for **permanent positions**, a proportion that will be **only 27% for employees working on the deck**.
- **Three out of four companies (75%) generally have difficulty hiring employees** for at least one **navigating occupation**.
 - **The occupations for which companies seem to have the most difficulty hiring** are: **master with STCW certification** (100% companies planning to hire for this occupation stated that they generally have difficulty hiring employees and 23% indicated that it took 12 months on average for them to hire for this occupation), **chief mate with STCW certification** (100% have difficulty), **chief mate, domestic** (100%), **electrician/electrotechnician** (100%) and **engineer** (100% have difficulty hiring first-class and second-class engineers and 92% have difficulty hiring fourth-class engineers; 42% indicated that it took more than 12 months on average to hire first-class engineers, a proportion that is 25%, 21% and 13% respectively for second-class, third-class and fourth-class engineers).
- Finally, **normal personnel turnover** and **retirements** were the **reasons companies gave most often to explain the navigating personnel hires foreseen** over the next three years (mentioned respectively by 65% and 61% of companies). The creation of new jobs within companies and an increase in the number of employees needed for existing occupations were significant reasons but ranked far behind (23% and 20% respectively).

5 Hiring of non-navigating personnel: 1 025 hires are expected over the next three years; 71% of companies say they have difficulties hiring non-navigating personnel

- Among the 298 companies that currently employ non-navigating personnel, **half (52%) foresee hiring non-navigating personnel in Québec over the next three years**. More specifically, **48% plan to hire administrative personnel** and **only 16%** (mainly big companies) plan to hire **for at least one operations/cargo handling occupation**.
 - The industry expects to **hire employees for each non-navigating personnel occupation** over the next three years, although very few companies plan to hire safety and security personnel (1%). **The occupation that will be most in demand** in companies that currently employ non-navigating personnel is **non-human-resources managers and professionals** (41% of companies plan to hire for this occupation).
- In terms of number of employees, **companies** currently employing non-navigating personnel **plan to hire 1 025 non-navigating employees over the next three years**, divided almost equally among administrative occupations (586 hires planned, or 57%) and operations/cargo handling occupations (440 hires planned, 43%).
 - Not surprisingly, the occupation **in which the most employees will possibly be hired is non-human-resources managers and professionals** (394 hires planned), followed by the **occupation of longshoremen/stevedores**, for which companies that currently employ non-navigating personnel plan to **hire 221 employees** over the next three years.
- Companies foresee that **80% of the non-navigating employees they hire** over the next three years **will have permanent jobs** and **20% will have temporary positions**. Note that **90% of administrative employees** will be hired for **permanent positions**, a proportion that will be **only 67% for operations/cargo handling employees**.
- **Seven out of ten companies (71%) generally have difficulty hiring employees** for at least one **non-navigating personnel occupation**. **Hiring difficulties seem to be slightly greater for operations/cargo handling occupations (83%)** and administrative occupations (64%).
 - The **occupations for which companies have the most difficulty hiring** are: **operations/cargo handling management personnel** (90% of companies planning to hire for this occupation stated that they generally have difficulty hiring employees for it), **administrative support employees (74%), longshoremen/stevedores (73%)** and **non-human-resources managers and professionals (65%)**.
- Finally, **normal personnel turnover** is the reason **companies gave most often to explain non-navigating personnel hires foreseen** over the next three years (mentioned by 54% of companies). **Retirements seem less problematic** than among navigating employees; only one-third (35%) of companies with non-navigating personnel mentioned them.