

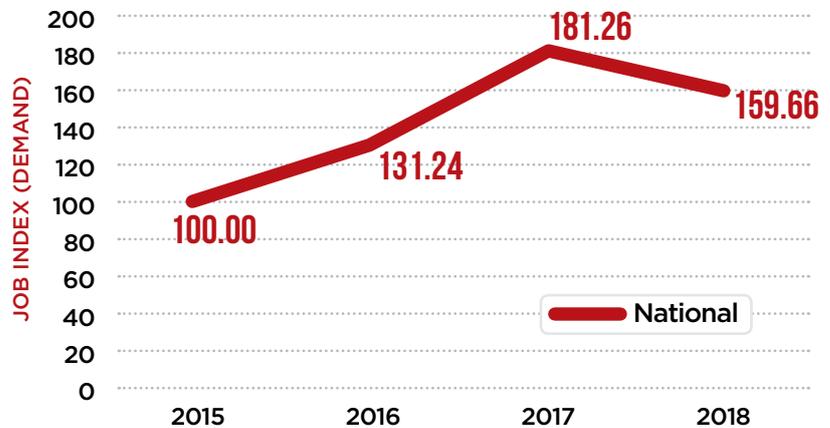
TRUCKING REPORT

Job vacancies is a critical measure of the trucking market and, in particular, the demand by employers for trucking professionals. Labourforce is a leading supplier of workforce solutions to the trucking industry. As part of our commitment to the sector we commissioned HRO2 Research to produce this unique report on the transport sector.

TRUCKING JOB INDEX

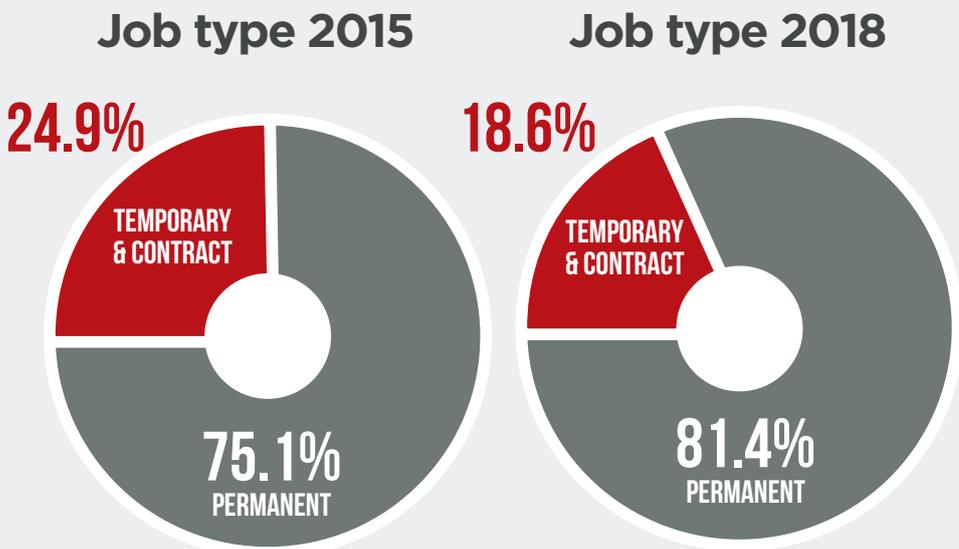
- ⚙️ The Labourforce Trucking Job Index measures demand over the last four years. 2015 is the base year when the Index is set at 100.00.
- ⚙️ Trucking job vacancies have risen 60% in the three years to 2018. Demand rose dramatically in the first two years, it peaked in 2017 and slipped back in 2018.
- ⚙️ This growth in job opportunities is above the Transport, Logistics and Supply Chain sector more broadly (e.g. across all occupations) and above the national market across all industries.

CHART 1 TRUCKING JOB INDEX



JOB TYPE ANALYSIS

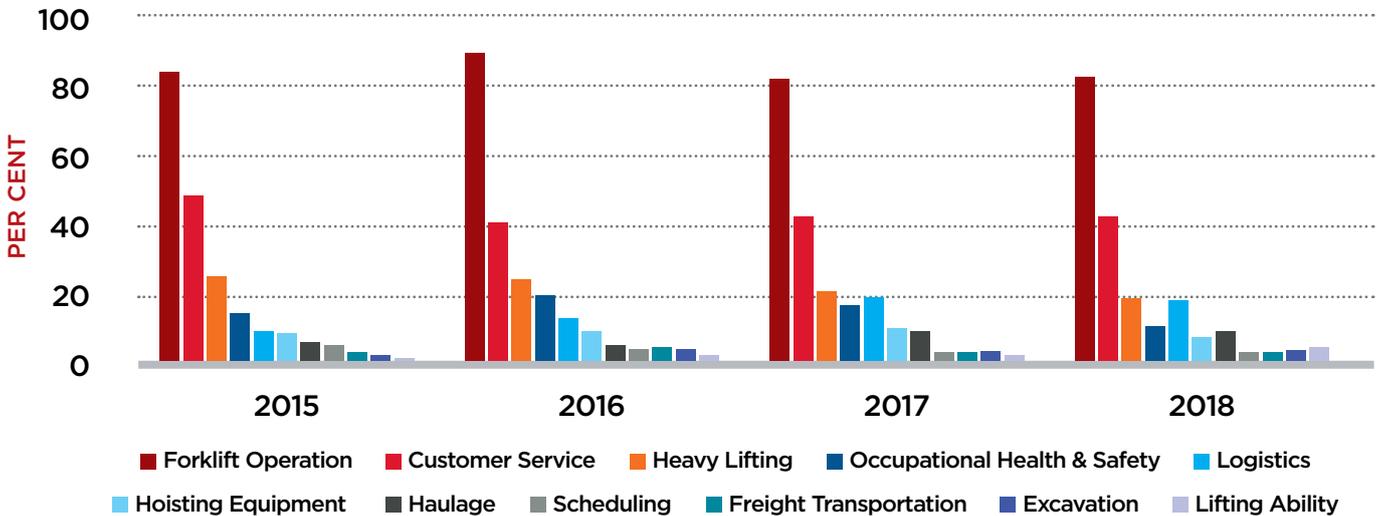
CHART 2 TRUCKING JOB VACANCIES BY JOB TYPE



- ⚙️ It is interesting to note that over this three year period the percentage of “Contingent” job vacancies has fallen as a percentage of all job vacancies from 24.9% (one in four) to 18.6% (close to one in five).
- ⚙️ This fall contrasts with the belief by many that “contingent” or “insecure” employment is growing. The data suggests otherwise.
- ⚙️ The reason for this is that whilst contingent opportunities have grown significantly over the period more traditional permanent employment has grown even faster.
- ⚙️ We attribute this to skills and talent shortages. If you can find staff, you are better served employing them on a permanent basis rather than risk losing them under more casual employment arrangements.

TRUCKING SKILLS ANALYSIS

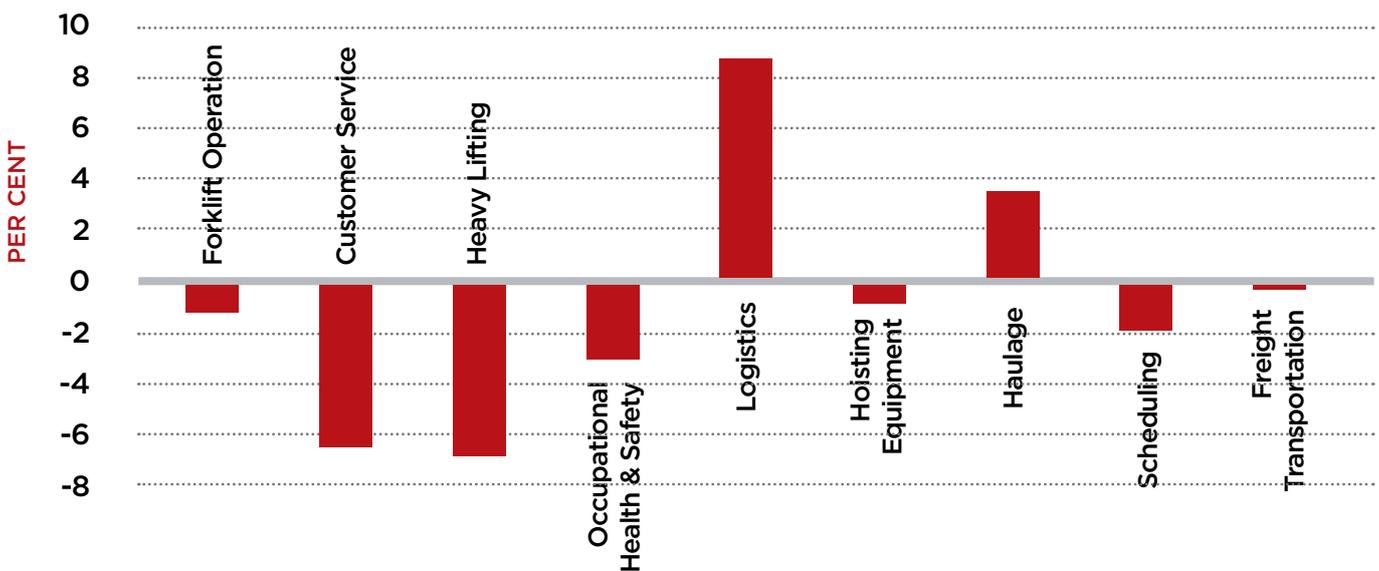
CHART 3 SKILLS REQUIRED PER JOB VACANCIES 2015 -18



- It comes as no surprise that forklift operations remain the most commonly sought after skill. Every year over 80% of job advertisement list this as a key requirement.
- Customer service abilities remain the second most commonly asked for skill by some considerable margin.

However, the percentage of job vacancies requiring this skill has fallen from 49.6% to 43.0%. It seems unlikely that employers are less particular about wanting good customer service skills but it may be more a case of it being assumed so need to expressly state it.

CHART 4 CHANGE IN SKILLS REQUIRED PER JOB ADVERTISEMENTS 2015 - 2018

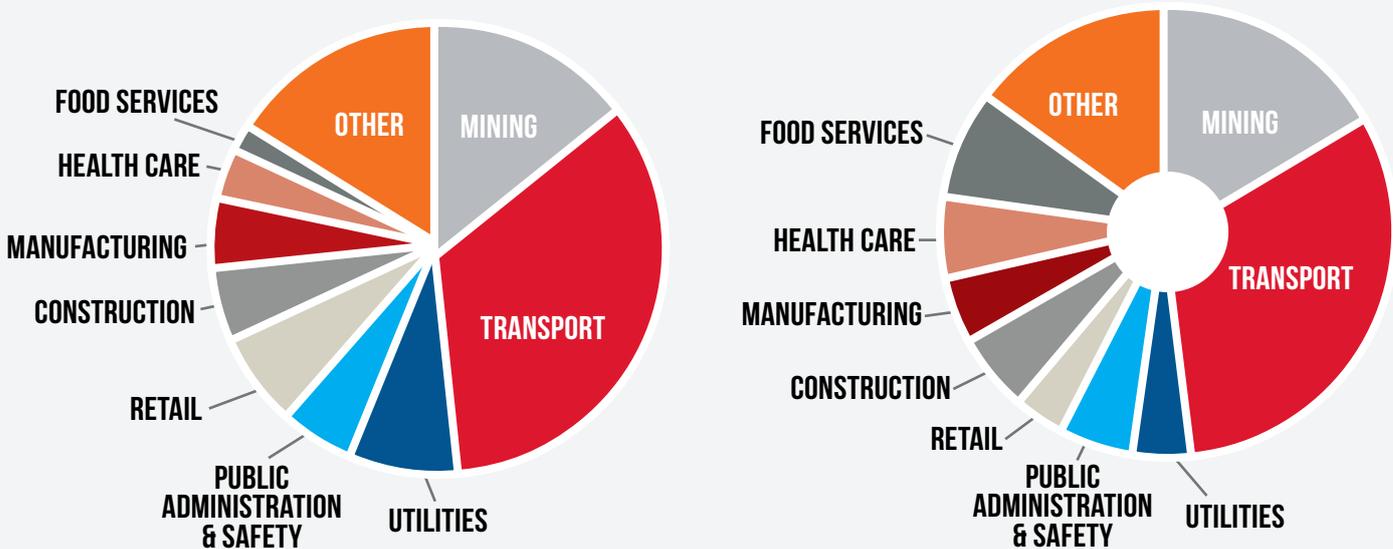


The most obvious change is that over three years the need for logistics skills has risen faster than anything else. This is an interesting development. Employers are not simply looking for drivers but for people who understand the industry more broadly. This reflects the changing nature of work where higher skills are required as automation replaces some of the more basic skills.

So conversely it is not surprising that Heavy Lifting is reducing in importance. It has fallen from 25.9% to 18.9%.

INDUSTRY ANALYSIS

CHART 5 TRUCKING JOB VACANCIES BY INDUSTRY

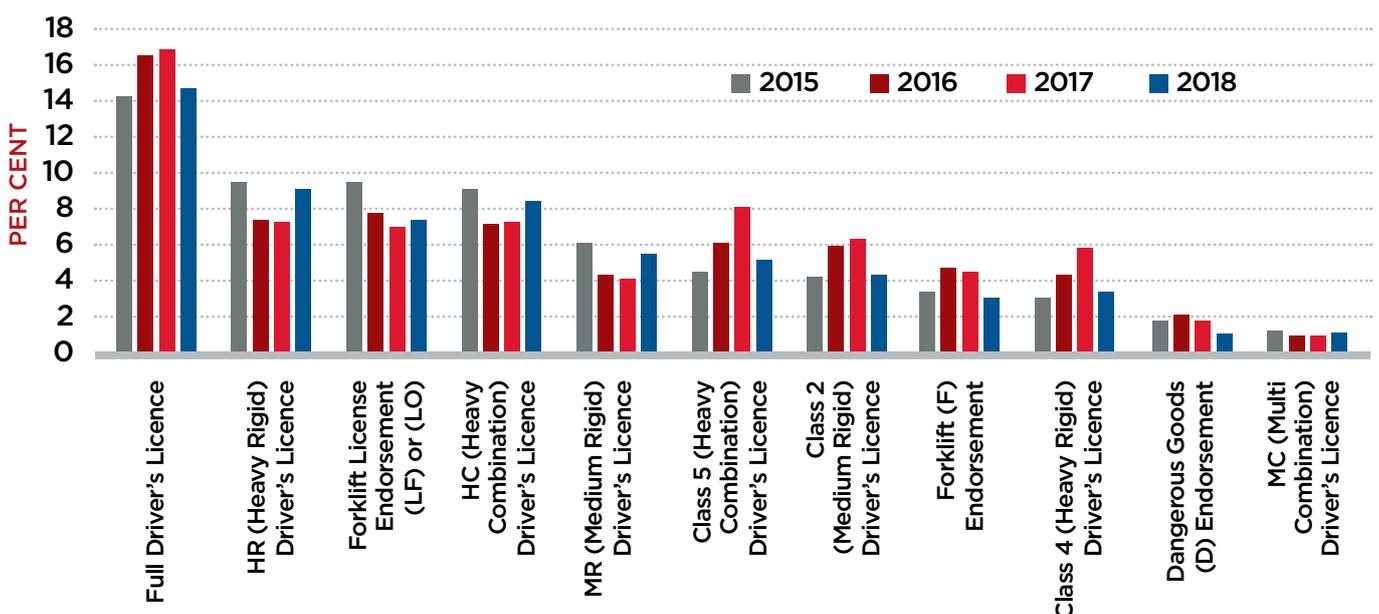


- ⚙️ The most significant change in three years is that Food Services has increased from 2.4% to 9.3%. This is because of the growth of home delivery driver jobs. There has been a corresponding 3.5% fall in job opportunities in retail due to disruption in the sector.
- ⚙️ The other sector to see a substantial rise in market share is Mining and Resources. This has risen from 17.0% to 19.4%

- because of the big increases in production since the mining investment boom.
- ⚙️ The share attributed to Transport employers has slipped by 3.3%. This is purely because other industries have grown at an even faster pace, probably in more localised transport. It may also be that some employers have brought their transport and logistics functions back in house.

ANALYSIS OF LICENSES/CERTIFICATION

CHART 6 LICENSES REQUIRED PER JOB VACANCIES 2015 -18

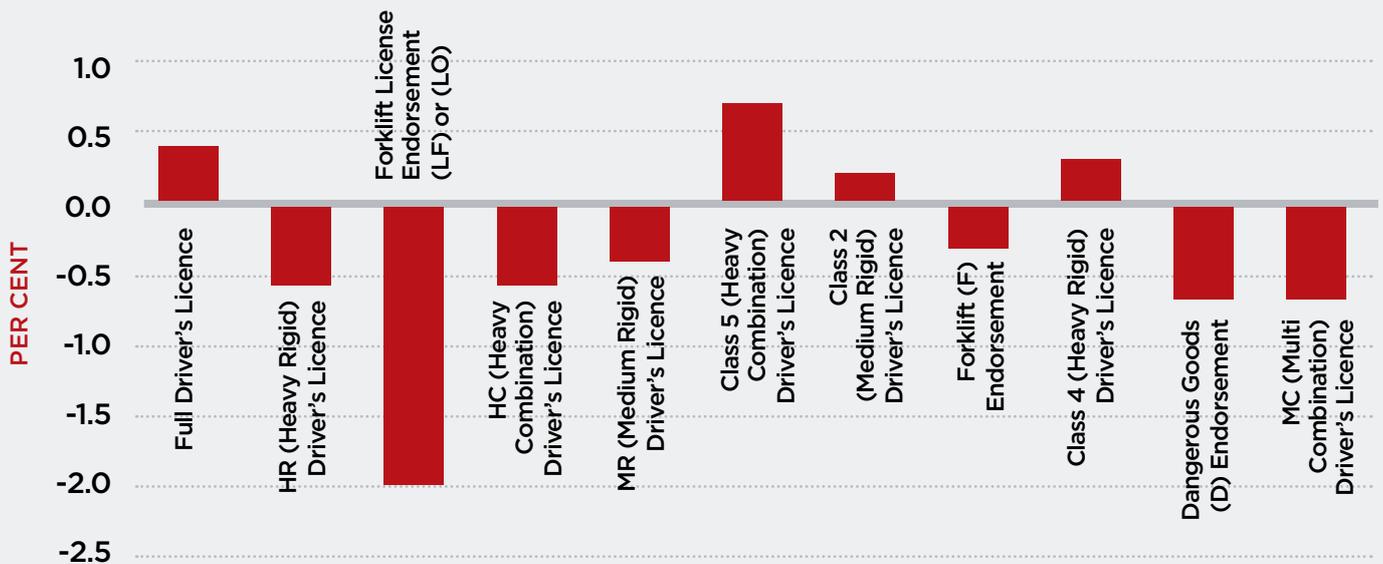


- ⚙️ A full drivers license remains the most frequently requested license although this is likely to be required more commonly in local delivery roles.

- ⚙️ A Heavy Rigid or Heavy Combination Drivers license is required in 17.4% of all vacancies.

TRUCKING REPORT

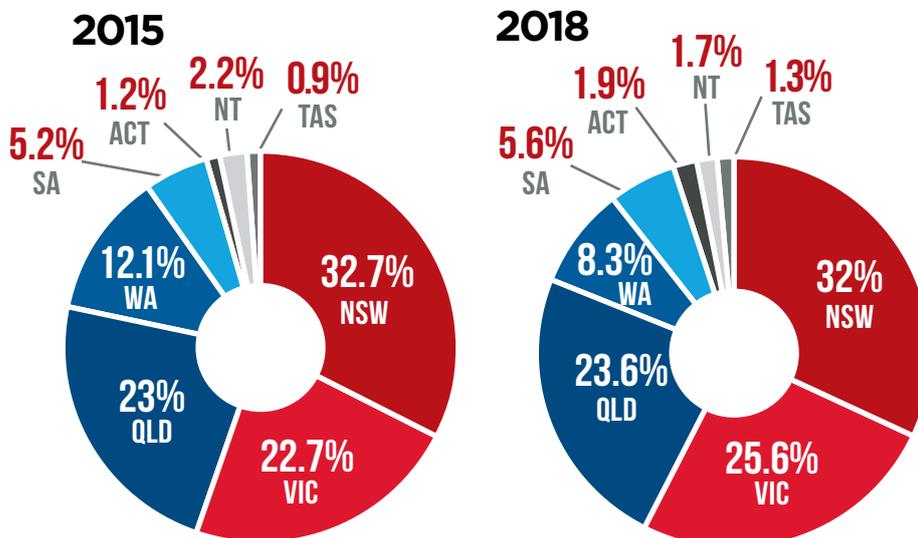
CHART 7 CHANGE IN LICENSES REQUIRED PER JOB ADVERTISEMENTS 2015 - 18



- Surprisingly there has been an overall decrease in licenses required. It is possible that employers are lowering their prerequisites in their job advertisements to attract more candidates and then assessing compliance.
- The only license to have grown substantially in the last three years is the need for a Class 5 (Heavy Combination) Driver's License.
- The other surprise is that the requirement for a Forklift License has fallen 2.0% over the last three years although the need for experience still dominates skills.

REGIONAL ANALYSIS

CHART 8 TRUCKING JOB VACANCIES BY REGION 2015 -18



- New South Wales holds the largest share of job vacancies (32.0%) although this has hardly changed in three years (2015 – 32.7%). The biggest winner is Victoria which has seen its share rise 2.9% from 22.7% to 25.6%.
- There has been a corresponding 3.8% decline in Western Australia. While the Mining sector has no doubt seen a rebound in trucking job opportunities the general weakness in WA in other sectors has dragged the state down.

METHODOLOGY

HRO2 Research Pty Limited is Australia's leading specialist in the analysis of job advertisement data. For this report HRO2 Research used Labour Insights, proprietary software published by Burning Glass Technologies Inc.

Job advertisements in Australia are extracted on a real time basis across over 4,000 on line sources. These comprise employer career sites, recruitment web sites and job boards. Advertisements are deduplicated. Artificial intelligence is then used to code every advertisement across a wide range of fields including location, job type, industry, occupation, skills and certification.

Job data was collected for each calendar year from 2015 to 2018 for the ANZSCO 3 digit Occupation 733 – Truck Drivers.

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For more information about Labourforce Impex Transport, Logistics & Supply Chain Job Index

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