



Employment Outlook for Transport, Postal and Warehousing



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Introduction

The Transport, Postal and Warehousing industry is the ninth largest employing industry in Australia, employing just over half a million workers (597 200 or 5.5 per cent of the total workforce) as at February 2009.

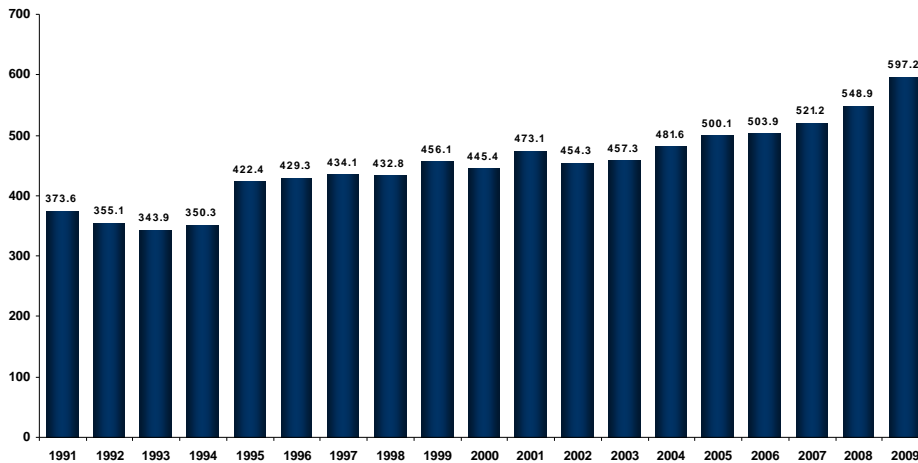
Transport, Postal and Warehousing is vital to the Australian economy, underpinning a diverse range of industries and activities. The industry is roughly divided into 14 sectors: Road Freight Transport; Postal, Courier Pick-up and Delivery Services, Road Passenger Transport, Air and Space Transport, Other Transport Services, Warehousing and Storage Services, Water Transport Services, Rail Passenger Transport, Scenic and Sightseeing Transport; Airport Operations and Other Air Transport, Rail Freight Transport, Water Freight Transport, Water Passenger Transport, Pipeline and Other Transport.

The discussion below focuses on employment characteristics, trends and prospects in the Transport, Postal and Warehousing industry, and highlights specific sectors where job growth is strongest. The analysis of characteristics includes workforce ageing, employment share by gender, educational profile, weekly earnings, average hours worked, regional and occupational employment.

Employment Growth

Over the last decade, employment in the Transport, Postal and Warehousing industry has shown strong long-term growth. In the 10 years to February 2009, employment in the industry rose by 141 000 (or 30.9 per cent) to 597 200 (see Figure 1). This represents an average annual growth rate of 2.7 per cent.

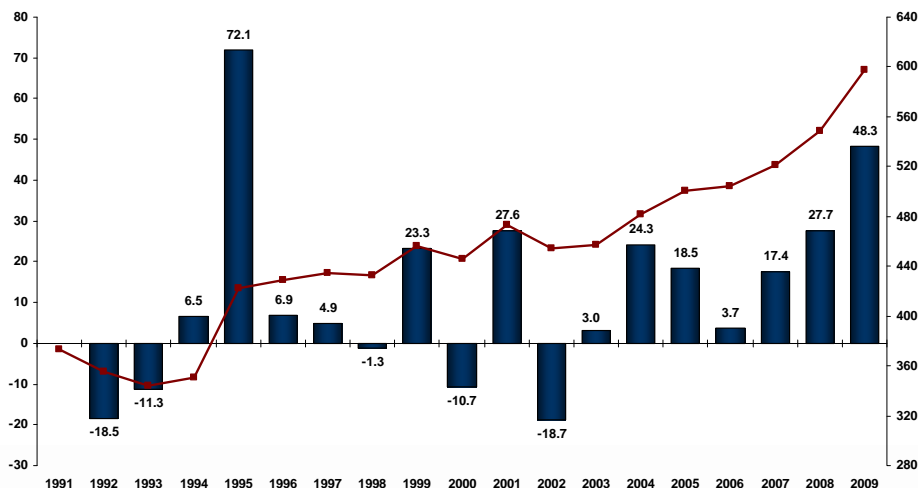
Figure 1: Employment Level ('000) - February 1991 to February 2009



Source: ABS Labour Force Survey (DEEWR trend data)

While long-term job growth in the Transport, Postal and Warehousing industry has been strong, annual employment changes have historically been variable. The largest annual employment fall in the industry was in the year to February 2002 (down by 18 700). However, since then, industry employment has trended upwards. The Transport, Postal and Warehousing industry responds to economic cycles as movements in both raw materials and consumer goods contract or expand. In the seven years to February 2009, the industry has recorded successive employment gains.

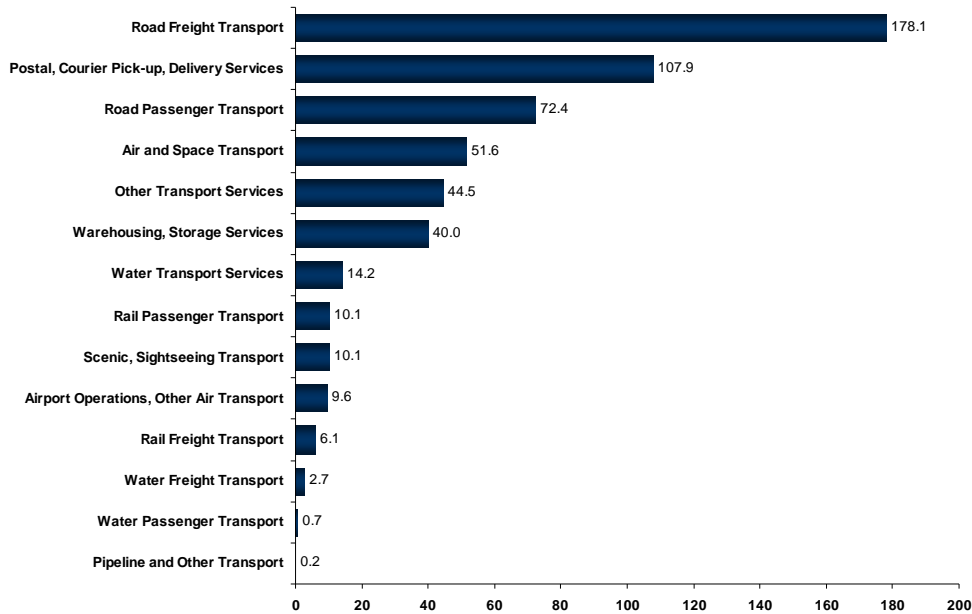
Figure 2: Employment Level (line RHS) and Annual Change ('000) - year to February (cols LHS)



Source: ABS Labour Force Survey (DEEWR trend data)

When employment in the Transport, Postal and Warehousing industry is broken down into specific sectors, the main contributors to employment can be identified. The Road Freight Transport sector dominates employment in the industry, accounting for nearly one third (32.5 per cent) of industry employment or 178 100 workers as at February 2009 (see Figure 3). Postal, Courier Pick-up and Delivery Services was the second largest source of employment, employing 107 900 workers (or 19.7 per cent), followed by Road Passenger Transport (72 400 or 13.2 per cent). Employment levels in Pipeline and Other Transport (200 or rounded to 0.0 per cent) and Water Passenger Transport (700 or 0.1 per cent) were very low.

Figure 3: Transport, Postal and Warehousing Sectors - Employment Level ('000) – February 2009



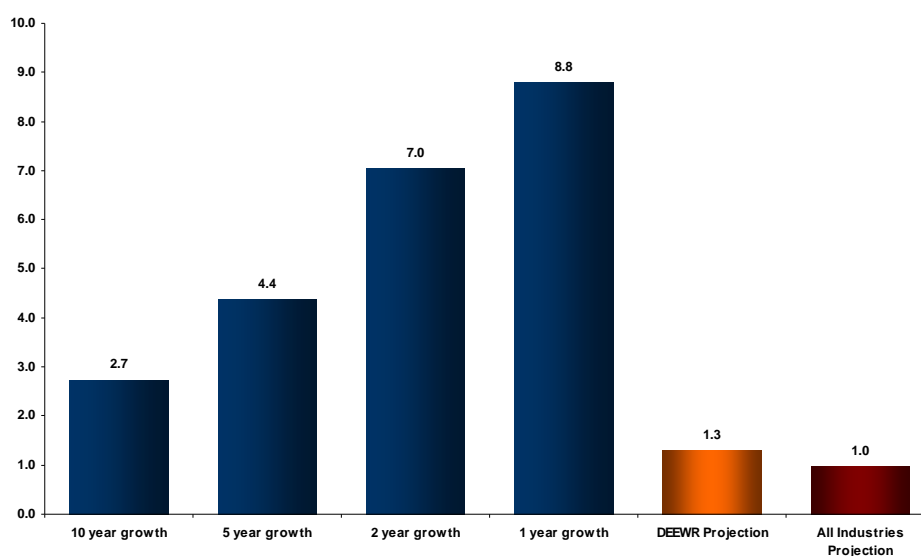
Source: ABS Labour Force Survey (DEEWR trend data)

Employment Prospects

The Department of Education, Employment and Workplace Relations (DEEWR) prepares annual updates of employment projections for industries for the next five years. These are based in part on the Monash model developed by the Centre of Policy Studies at Monash University, but also take into account recent employment trends and prospective industry developments. It should be noted that a certain degree of uncertainty is attached to these employment projections, especially for sectors within the broader Transport, Postal and Warehousing industry.

Projected job growth for Transport, Postal and Warehousing is much lower than past industry employment growth (see Figure 4). Growth was particularly evident over the year to February 2009 (8.8 per cent). In the five years to 2013-14, employment in the industry is expected to grow at an average rate of 1.3 per cent per annum. This compares with an average annual growth rate of 1.0 per cent for all industries over the same period.

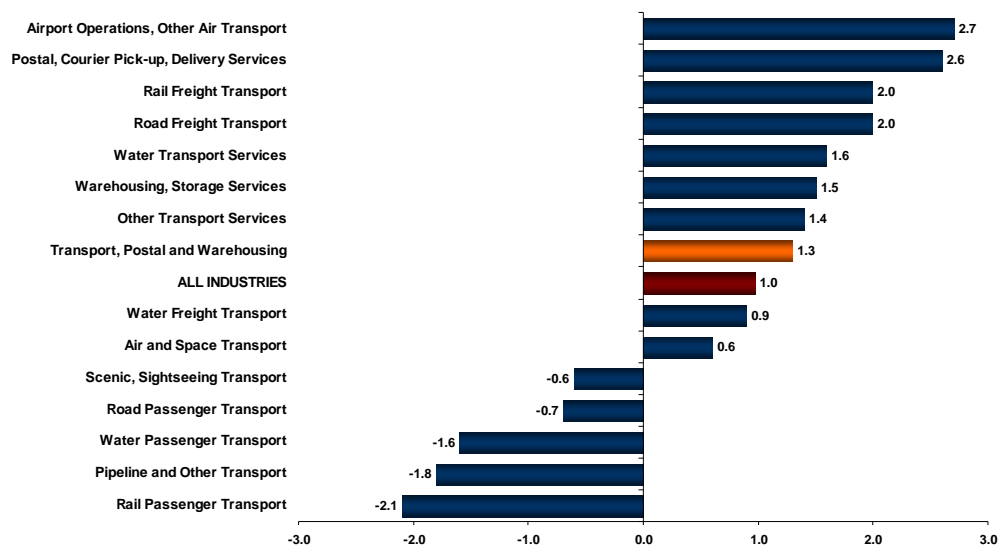
Figure 4: Recent and Projected Employment Growth (% pa) - to February 2009 (past) and 5 years to 2013-2014 (projected)



Source: ABS Labour Force Survey (DEEWR trend data); DEEWR projections

Employment is expected to increase across nine of the fourteen specific Transport, Postal and Warehousing sectors (see Figure 5). The Airport Operations and Other Air Transport sector is projected to experience the strongest employment growth within the industry (up by 2.7 per cent per annum), closely followed by Postal, Courier Pick up and Delivery Services (2.6 per cent). The largest negative employment growth rate is projected for Rail Passenger Transport (down by 2.1 per cent per annum), followed by Pipeline and Other Transport (1.8 per cent) and Water Passenger Transport (1.6 per cent).

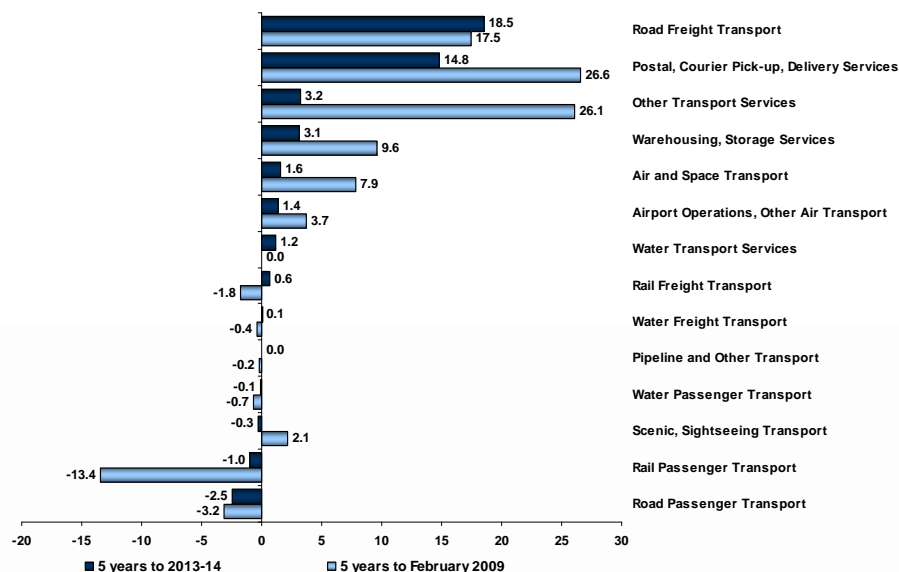
Figure 5: Transport, Postal and Warehousing Sectors - Projected Employment Growth (% pa) to 2013-2014



Source: DEEWR projections

In the five years to February 2009, the Postal, Courier Pick-Up and Delivery Services, and Other Transport Services sectors experienced the largest employment gains (26 600 and 26 100 new jobs respectively, see Figure 6). In the five years to 2013-14, the largest number of new jobs is projected for Road Freight Transport (up by 18 500), followed by Postal, Courier Pick-Up and Delivery Services (14 800).

Figure 6: Transport, Postal and Warehousing Sectors - Recent and Future Employment Growth ('000) - 5 years to February 2009 (past) and to 2013-14 (projected)

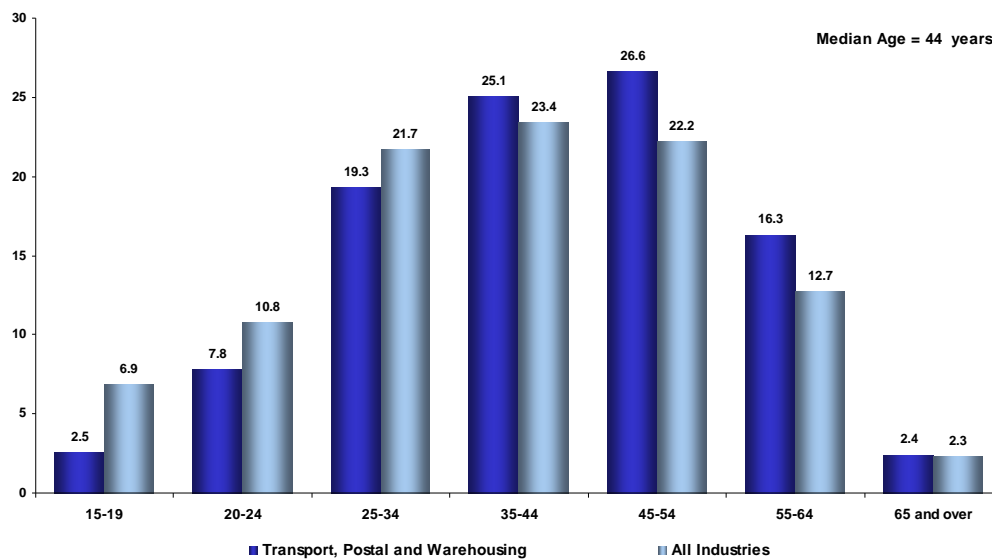


Source: ABS Labour Force Survey (DEEWR trend data); DEEWR projections

Workforce Ageing

The ageing of the workforce is evident in the Transport, Postal and Warehousing industry. Compared with other industries, the age profile of this industry is skewed towards older age groups (see Figure 7). Transport, Postal and Warehousing has a higher concentration of workers aged 35 years and older (70.4 per cent compared with 60.6 per cent for all industries). The share of workers aged 15 to 34 years, by contrast, is below the average for all industries (29.6 per cent compared with 39.4 per cent for all industries). This may be attributable, in part, to the licensing requirements in key employing occupations (particularly drivers) which may limit the employment of younger workers. Workforce ageing is likely to exacerbate skill shortages that are already evident.

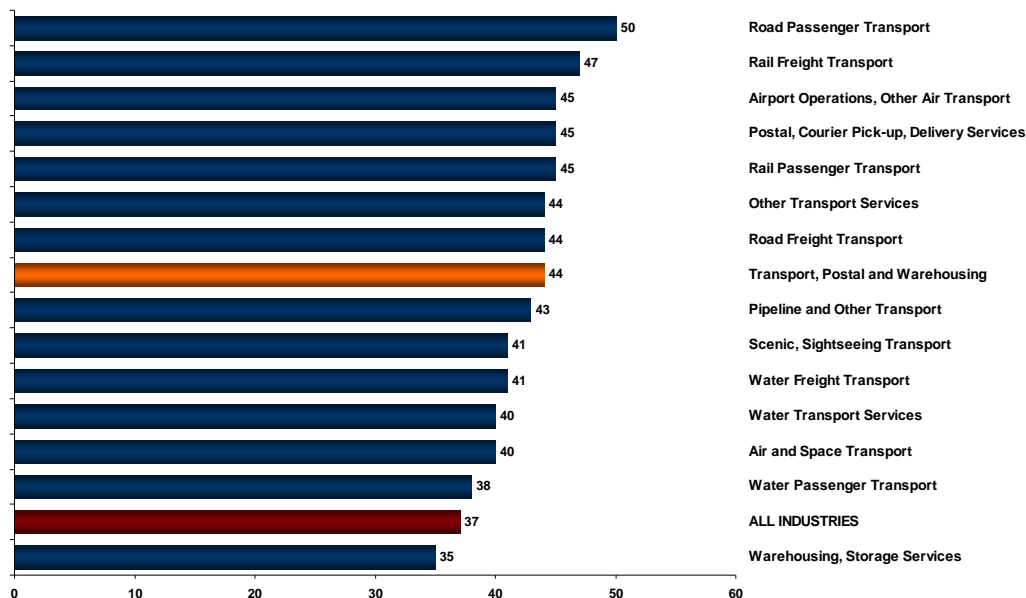
Figure 7: Employed Persons by Age Compared with All Industries (% share of employment) - 2008



Source: ABS Labour Force Survey

The Transport, Postal and Warehousing industry had a median age of 44 years in 2008, which compares with a median age of 37 years for all industries (see Figure 8). The median age varies considerably within the industry, ranging from 50 years for Road Passenger Transport, down to 35 years for Warehousing and Storage Services.

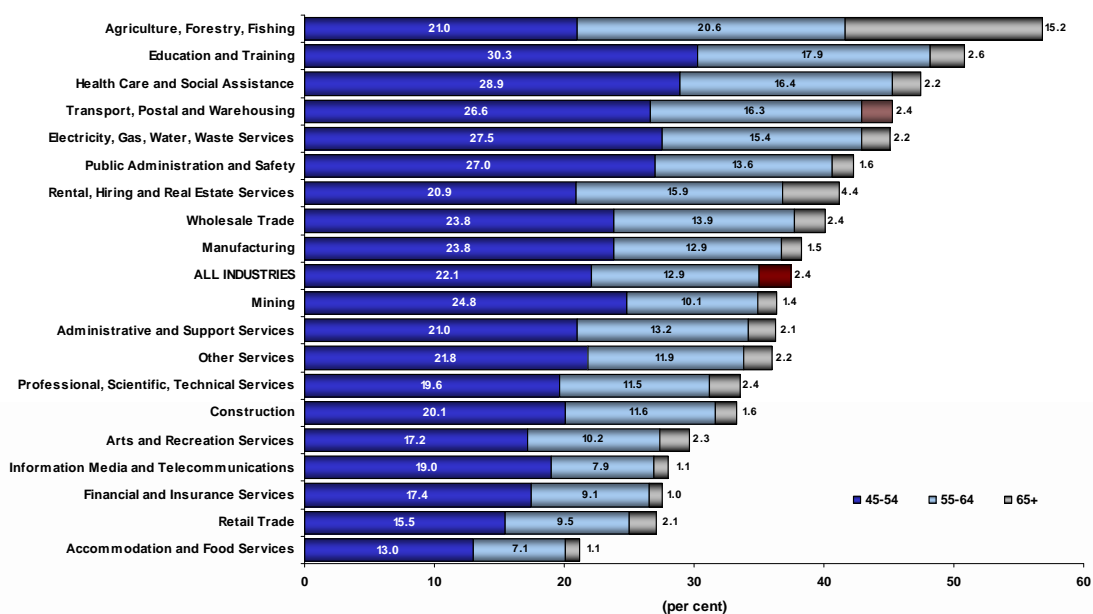
Figure 8: Transport, Postal and Warehousing Sectors - Median Age (years) - 2008



Source: ABS Labour Force Survey

Transport, Postal and Warehousing has a relatively high share of mature age workers (45 years and over). In 2008, over two fifths (45.3 per cent) of workers in the industry were aged 45 years and over, compared with the average of 37.4 per cent for all industries (see Figure 9). Of all 19 broad ANZSIC industries, Transport, Postal and Warehousing had the fourth largest share of workers aged 55 to 64 years and the fifth largest share of workers aged 45 to 54 years.

Figure 9: Mature Age Workers (45+ years) - % share of employment - 2008



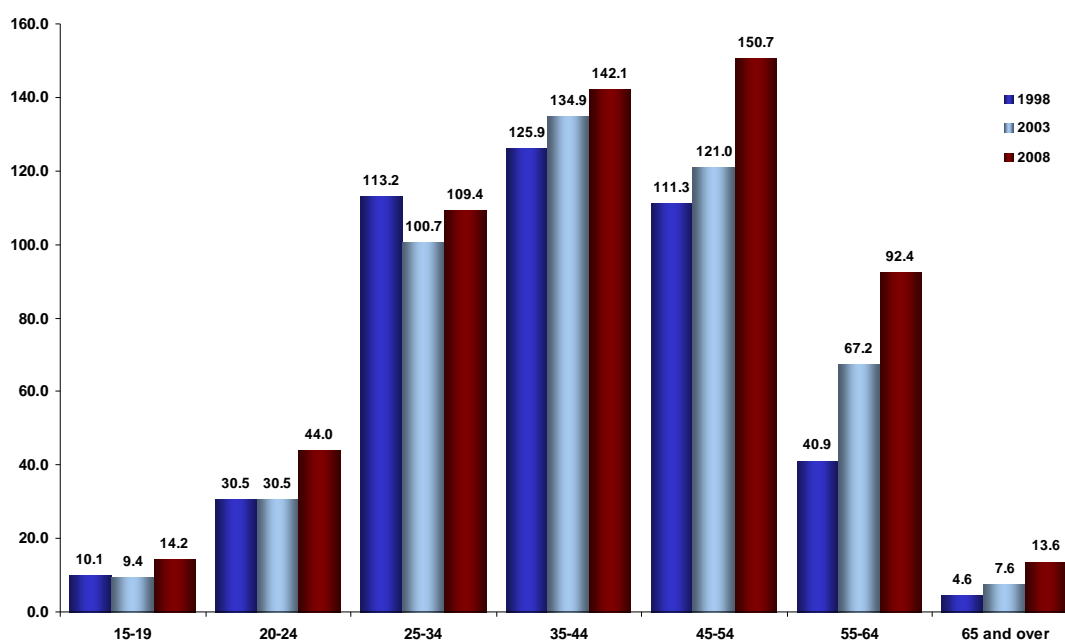
Source: ABS Labour Force Survey

Figure 10 shows employment by age group for three calendar years: 1998, 2003 and 2008. This provides a guide to changes in the employment mix by age group in the Transport, Postal and Warehousing industry.

As the Australian workforce experiences an increase in the median age of the population, it is important that there is a supply of prime age and mature age workers entering the workforce.

Workers aged between 55 and 64 years experienced the largest employment growth in the 10 years to 2008 (up by 51 500), followed by workers aged 45 to 54 years (39 400). This reflects existing workers taking their jobs with them as they move into mature age cohorts, as well as new mature age workers entering the industry. Over the past decade, employment fell for workers aged between 25 and 34 years, with a decrease of 3800 workers.

Figure 10: Employed persons by age ('000) - 1998, 2003, 2008

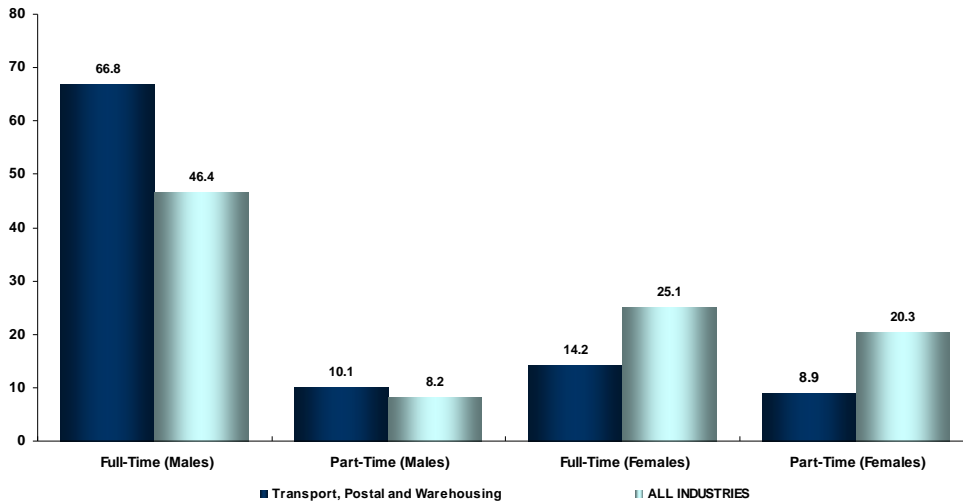


Source: ABS Labour Force Survey

Employment by Gender and Full-time/Part-time

Transport, Postal and Warehousing workers are predominantly male, with males accounting for over three quarters (76.9 per cent) of industry employment, compared with the all industries average of 54.6 per cent (see Figure 11). The Transport, Postal and Warehousing industry also has a relatively low share of part-time employment (19.0 per cent compared with 28.5 per cent for all industries). This reflects a considerably lower level of part-time employment for females in Transport, Postal and Warehousing than for females in all industries (8.9 per cent compared with 20.3 per cent for all industries).

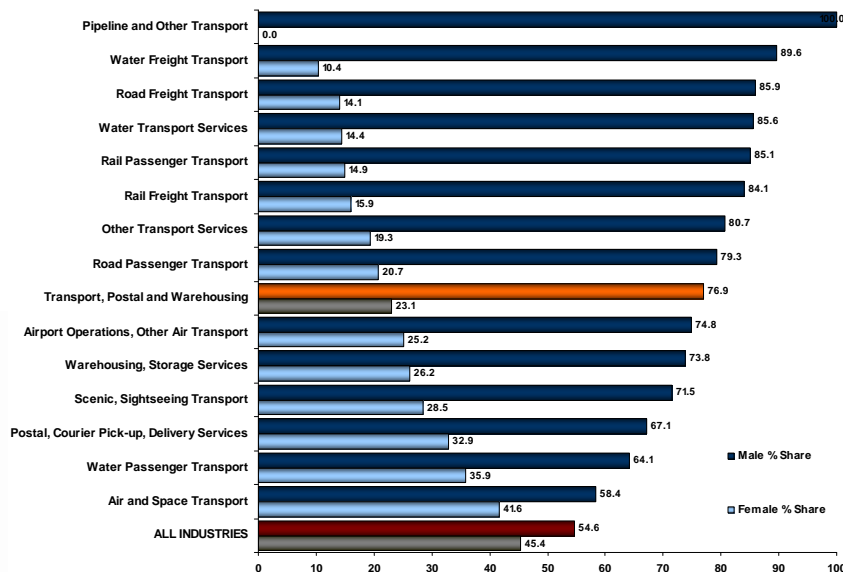
Figure 11: Employment by Gender and Full-time / Part-time (% share) – year to February 2009



Source: ABS Labour Force Survey

Male employment dominated all the sectors within the Transport, Postal and Warehousing industry in the year to February 2009, which may reflect the type of work undertaken (see Figure 12). Pipeline and Other Transport reported the highest percentages of male workers (100.0 per cent and 89.6 per cent respectively). Air and Space Transport had the highest share of female employment (41.6 per cent) even though there was still a higher share of male workers employed in this sector (58.4 per cent).

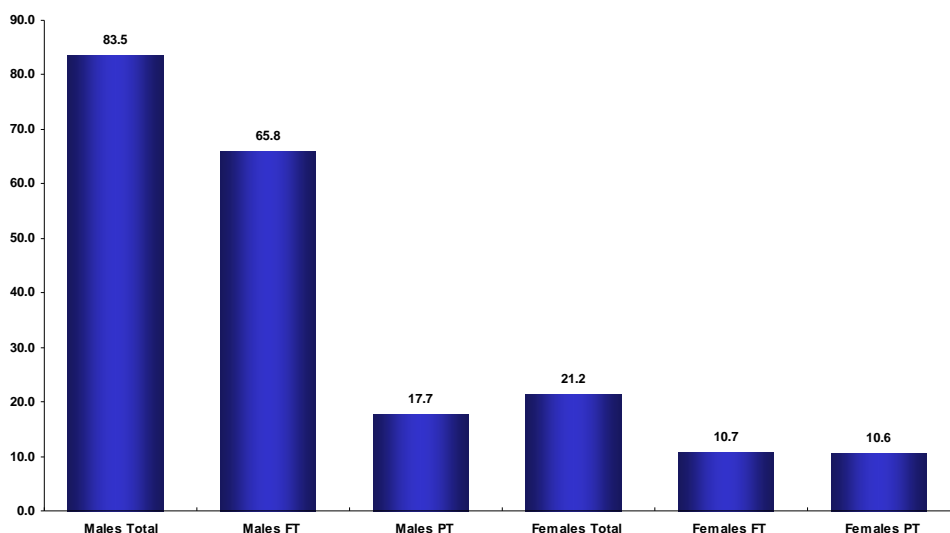
Figure 12: Transport, Postal and Warehousing Sectors - Employment by Gender (% share) year to February 2009



Source: ABS Labour Force Survey

In the five years to February 2009, there has been an increase in employment for both male and female workers in Transport, Postal and Warehousing (up by 83 500 and 21 200 respectively). The majority of this employment growth can be attributed to male and female full-time workers (up by 65 800 and 10 700 respectively, see Figure 13).

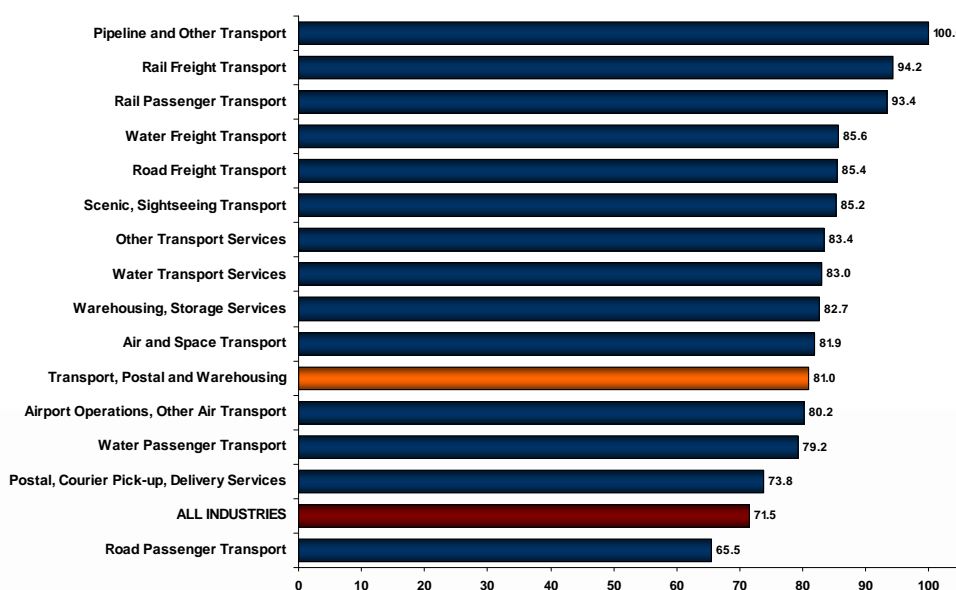
Figure 13: Employment Growth by Gender (5 years) Full-time/Part-time ('000) - year to February 2009



Source: ABS Labour Force Survey

All of the Transport, Postal and Warehousing industry sectors had a higher full-time employment share than all industries (71.5 per cent, see Figure 14), with the exception of Road Passenger Transport (65.5 per cent). The highest full-time employment shares were recorded in Pipeline and Other Transport (100.0 per cent), followed by Rail Freight Transport (94.2 per cent) and Rail Passenger Transport (93.4 per cent).

Figure 14: Transport, Postal and Warehousing Sectors - % working full-time - year to February 2009

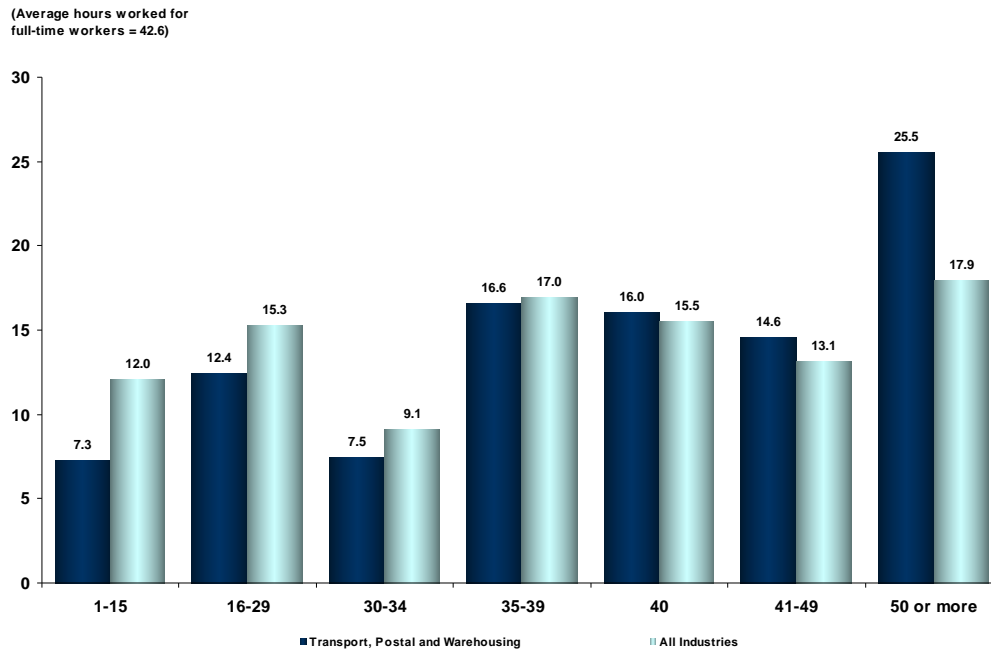


Source: ABS Labour Force Survey

Hours Worked

In 2009, average full-time weekly hours for the Transport, Postal and Warehousing industry were slightly higher than the all industries average (42.6 hours compared with 41.3 hours for all industries, see Figure 15). Over a fifth of workers (25.5 per cent) employed in Transport, Postal and Warehousing worked 50 or more hours a week. In contrast, only 27.2 per cent reported to work 34 hours or less per week, compared with 36.4 per cent for all industries.

Figure 15: Hours of Work - year to February 2009 (% share)



Source: ABS Labour Force Survey

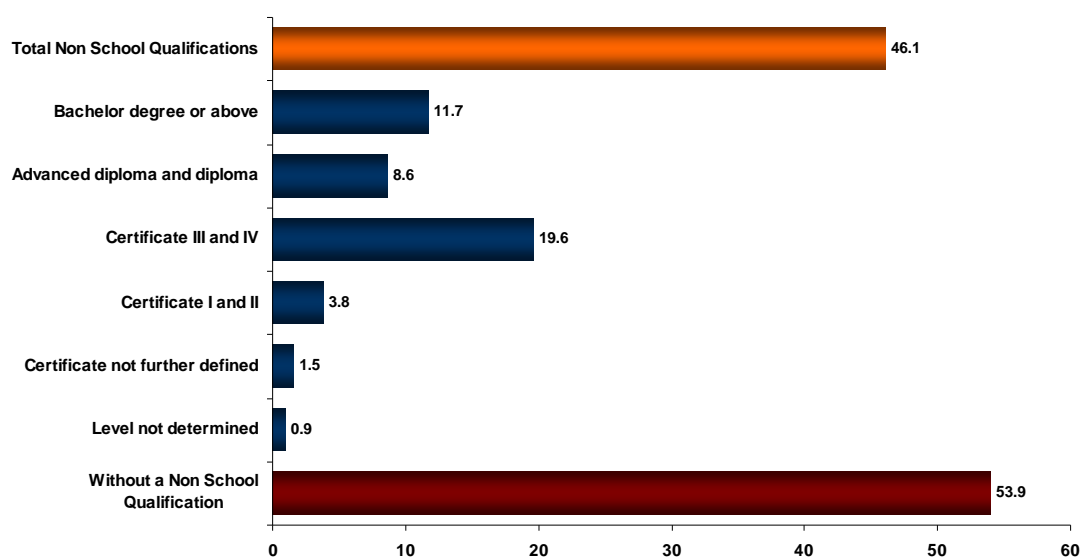
Employment Characteristics

Educational Profile

The Transport, Postal and Warehousing industry provides good opportunities for low skilled workers and mature age workers returning to employment. Although formal qualifications are becoming more important in the industry, more than half of Transport, Postal and Warehousing workers (53.9 per cent) were without a non-school qualification as at May 2008 (see Figure 16).

In contrast, there were 46.1 per cent of industry workers who had completed a non-school qualification. The majority of these workers had gained a Certificate III or IV (19.6 per cent) or a Bachelor degree or higher qualification (11.7 per cent).

Figure 16: Educational Attainment - Share of Employment (%) - May 2008

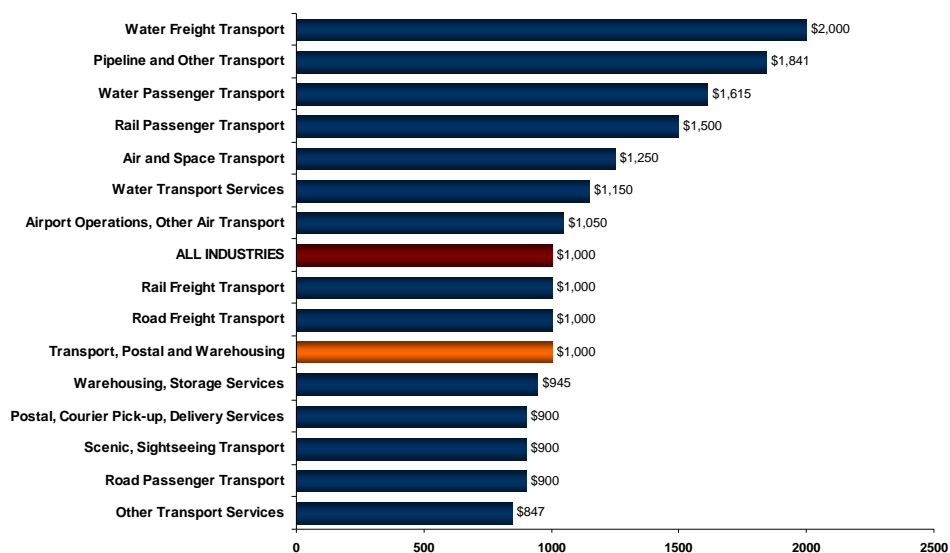


Source: ABS Education and Work, cat. no. 6227.0

Median Weekly Earnings

As at August 2008, median weekly full-time earnings in Transport, Postal and Warehousing were equal to the all industries average of \$1000 (see Figure 17). Within the industry, earnings were highest in Water Freight Transport (\$2000), Pipeline and Other Transport (\$1841), and Water Passenger Transport (\$1615). The lowest median full-time weekly earnings were recorded in Other Transport Services (\$847).

Figure 17: Transport, Postal and Warehousing Sectors - Median weekly earnings (full-time and before tax) - August 2008

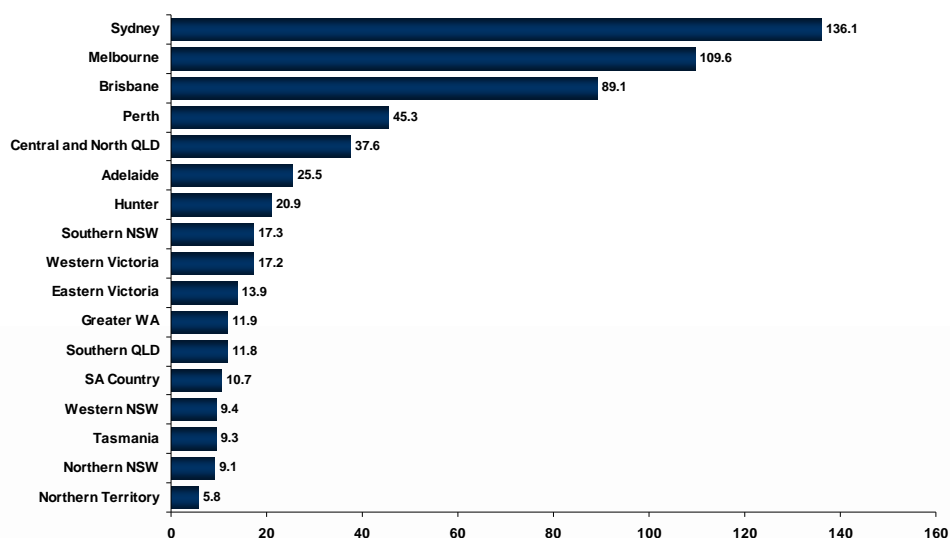


Source: ABS Employee Earnings, Benefits and Trade Union Membership, cat. no. 6310.0

Employment by Region

Employment in the Transport, Postal and Warehousing industry is concentrated in the major capital cities in Australia, reflecting the large population base in these cities (Figure 18). In 2009, the majority of workers in the industry were employed in Sydney (136 100), followed by Melbourne (109 600) and Brisbane (89 100).

Figure 18: Main Employing Regions ('000) – year to February 2009

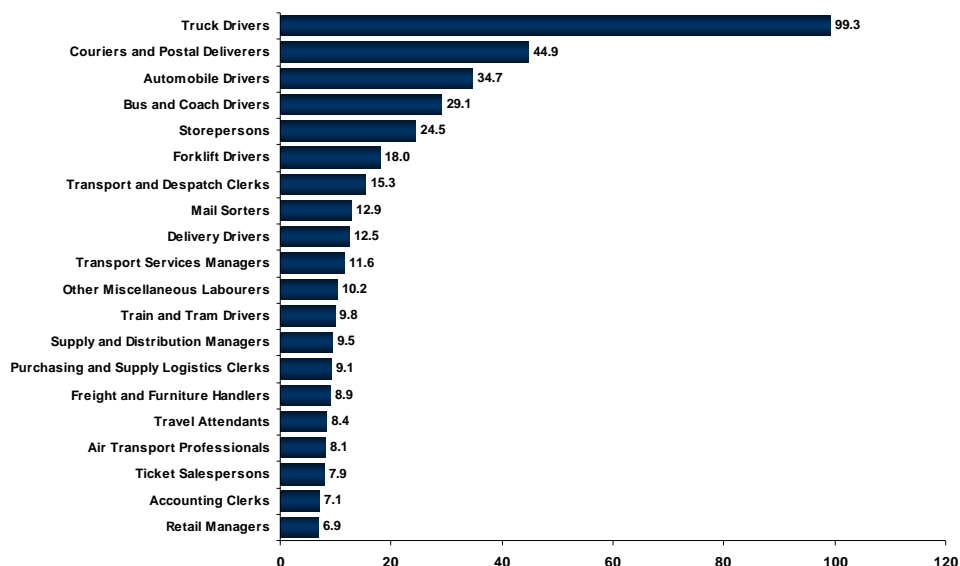


Source: ABS Labour Force Survey

Main Employing Occupations

The Transport, Postal and Warehousing industry offers a diverse range of career options. Truck Drivers continue to dominate employment in the industry, accounting for 99 300 workers in 2008 (see Figure 19). Other common occupations for employees working in the industry include Couriers and Postal Deliverers (44 900), Automobile Drivers (34 700), Bus and Coach Drivers (29 100), and Storepersons (24 500).

Figure 19: Top 20 Employing Occupations ('000) –2008



Source: ABS Labour Force Survey

Further information on occupations is available on the Job Outlook website (www.joboutlook.gov.au)

For further information on the Transport, Postal and Warehousing industry (or other industries), visit the SkillsInfo website at skillsinfo.gov.au. SkillsInfo provides a range of skills related information for industries and regions. The website offers a broad range of information on employment, careers, education and training and skills issues – including workforce ageing, skills in demand, labour force data, ICT and employability skills, as well as quick links to skills information. Data are sourced mainly from the ABS Labour Force Survey.

SkillsInfo also brings together a large collection of links to external industry and skills related websites.

