

TRANSPORT, POSTAL & WAREHOUSING



Government of South Australia
Training and Skills Commission

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Sector Profile

Transport, Postal & Warehousing

Road Transport
Rail Transport
Water Transport
Air & Space Transport
Other Transport
Postal & Courier Pick-Up & Delivery Services
Transport Support Services
Warehousing & Storage Services



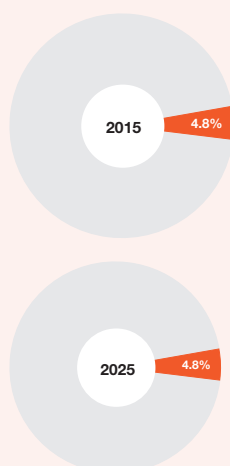
SHARE OF TOTAL EMPLOYMENT

Transport, Postal & Warehousing

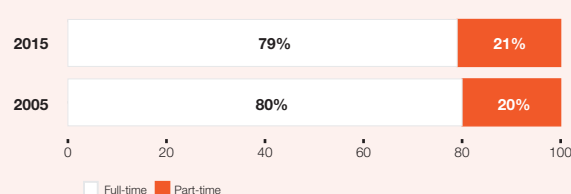
2015 - 38,000



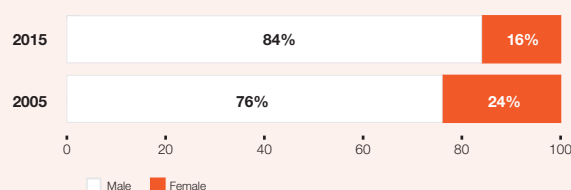
2025 - 42,000



EMPLOYMENT STATUS



GENDER

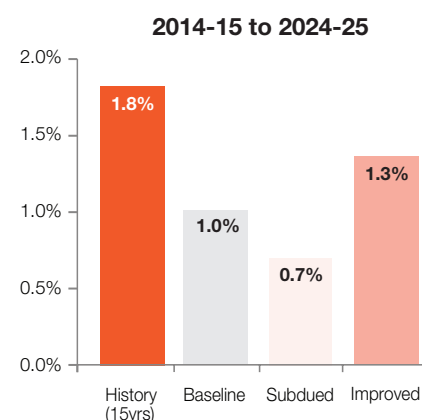
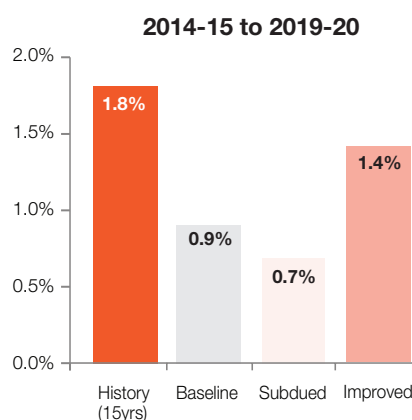


EMPLOYMENT OUTLOOK

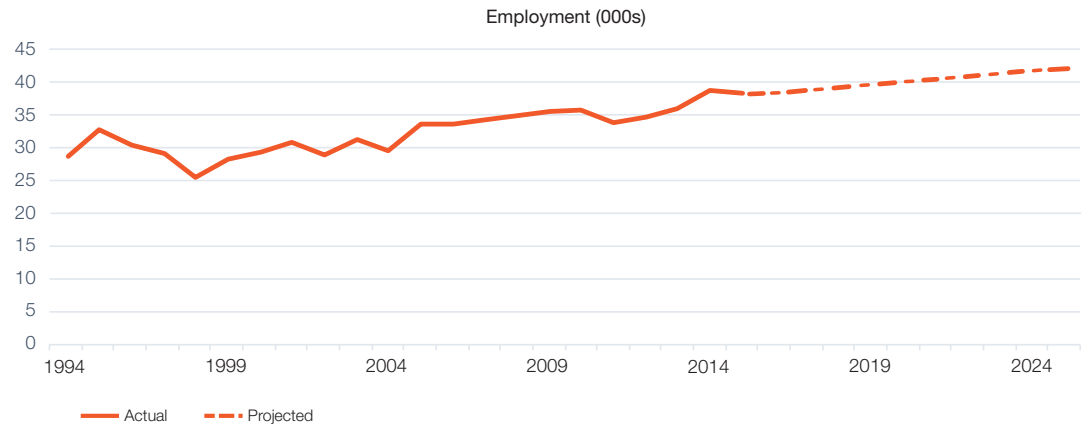
According to the Commission's projections, employment in the Transport, Postal and Warehousing industry is projected to increase by approximately 1.0 percent per year, on average, between 2015 and 2025. This compares with a rate of growth over the past 15 years of 1.8 percent per annum.

The industry's share of the State's total employment is projected to remain at around 5 percent.

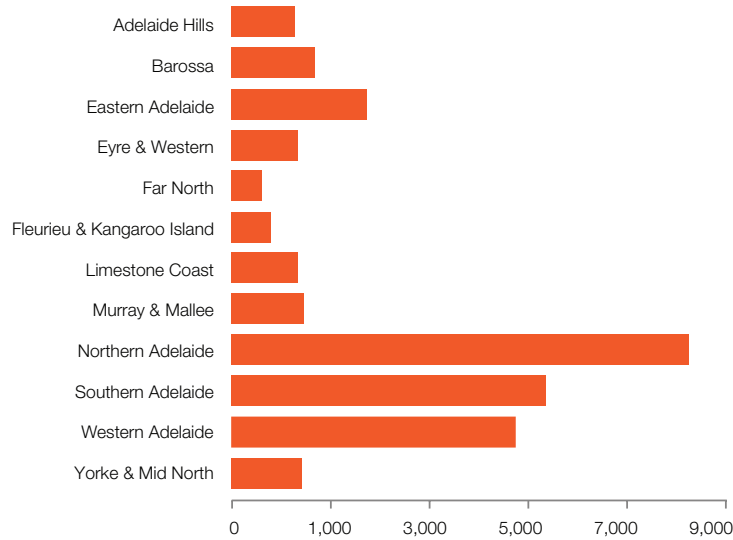
AVERAGE, ANNUAL EMPLOYMENT CHANGE



EMPLOYMENT CHANGE

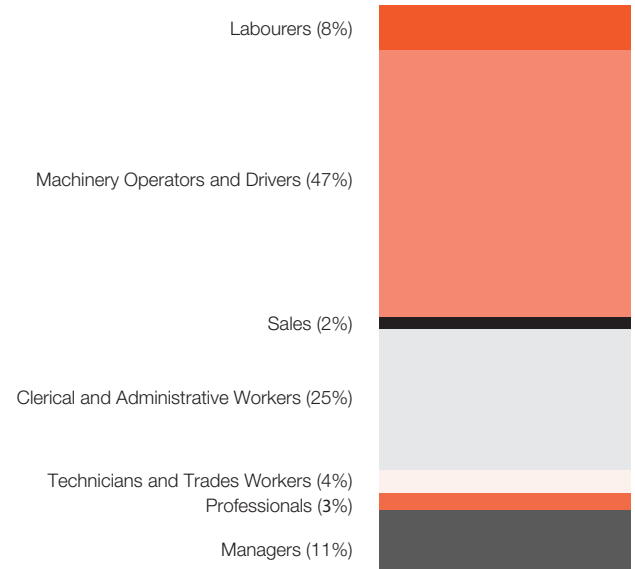


EMPLOYMENT BY REGION

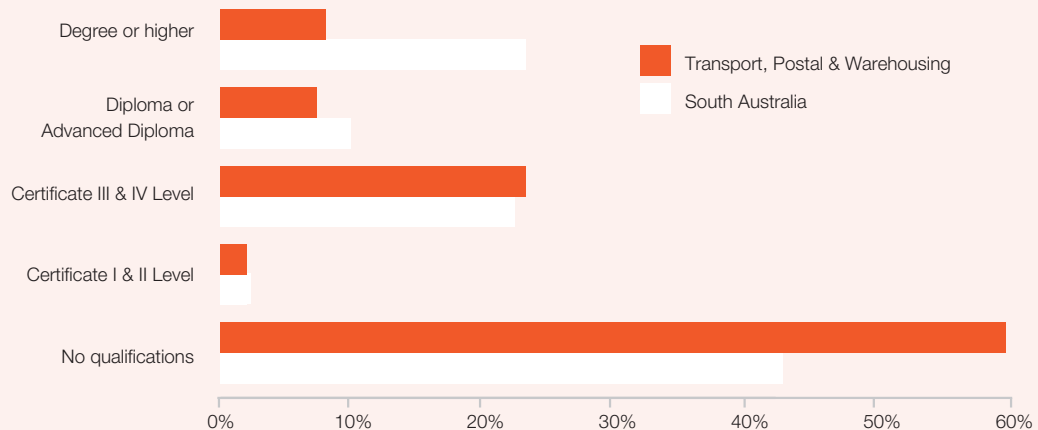


Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

PROJECTED SHARE OF EMPLOYMENT (2025)



EMPLOYMENT SHARE BY POST-SCHOOL QUALIFICATION LEVEL



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

INDUSTRY OUTLOOK

Employment in the Transport and Logistics industry is expected to continue to grow strongly. The domestic freight task increased 50 percent in the 10 years to 2016 and is forecast to grow another 26 percent by 2026 while domestic passenger task increased 8 percent in the 10 years to 2016 and is forecast to grow 19 percent by 2026¹. New and enhanced technologies in the form of robotics, automation, wireless sensor networks, intelligent objects, smart packages, mobile devices and Big Data are being used across the industry to enhance operational efficiency².

The majority of employment in the sector is full-time (69.9 percent) and the age profile of the workforce is younger than the State average. The most common qualifications are Certificate III or IV (held by 17.7 percent of workers); however almost three quarters of the workforce have no post-school qualifications³.

The performance of the Transport, Postal and Warehousing industry remains closely linked to the economic cycle. In South Australia, the next section of the North South Corridor to be delivered will be a 3.7km stretch of South Road between Torrens Road and the River Torrens, and is expected to significantly improve travel times for both north-south and east-west bound traffic.

The Commonwealth and State Governments have committed \$896 million to construct the Torrens Road to the River Torrens Project. The project will create an estimated 480 jobs per year during the construction phase. It is expected that the project will be completed by the end of 2018⁴.

The recent review of the passenger transport sector has led to regulatory changes including the introduction of competition to the market which has an expected short term split of 60 percent taxi and 40 percent ride sharing.

SKILLS NEEDS

The Training and Skills Commission's report to Government on South Australia's Industry Priority Qualifications (IPQ) released in March 2016, provided a unique opportunity for industry to identify their priority qualifications.

Transport, Postal and Warehousing industry respondents ranked the Work Health and Safety (WHS) skills cluster as having the highest importance, followed by the Sales and Customer Service, and Managerial and Leadership skills clusters.

Entrepreneurial and Language, Literacy and Numeracy (LLN) skills clusters were ranked as lowest importance by the Transport, Postal and Warehousing respondents.

Skills Clusters - Transport, Postal & Warehousing

Work Health & Safety (WHS)	1
Sales & Customer Service	2
Managerial & Leadership	3
Administration & Support	4
Information & Technology	5
Sustainability & Environmental	6
Marketing & Engagement	7
Human Resources	8
Financial	9
Language, Literacy & Numeracy (LLN)	10
Entrepreneurial	11

WORKFORCE DEVELOPMENT THEMES & ISSUES

The composition of the Transport, Postal and Warehousing industry shows that 66.7 percent are self-employed small businesses with 30 percent employing less than 20 people.

Despite huge strides in available technology, transport and logistics businesses differ in their ability to innovate through the introduction of technology due to varying levels of digital literacy in their workforce and capital availability⁵.

Unmanned vessels and the use of drone technology is already impacting the maritime and fishing sector which requires both traditional skills as well as training in manning and monitoring control systems. This training can require significant infrastructure investment for what is a relatively thin local market. Changing work practices in the fishing sector is expected to drive a need for skills in processing and value adding which may lead to demand for broader skill sets.

Concerns exist around the quality of drivers in the taxi and transport sectors with no training required for small passenger hire cars, reduced training for taxi drivers and significant gaps between formal qualifications and job readiness.

The ageing workforce is particularly visible in the road, rail and maritime sectors. With a large proportion of workers aged 45 years and over in some sectors such as marine and longevity of employment, the need for refresher courses continues but the lack of flexibility in training and reduced funding makes take up limited. Succession planning is a pressing issue for employers. This is particularly true for rural and remote operations, where the workforce tends to be older than in metropolitan areas.

Attracting young people into the industry is challenging with the industry perceived as offering an unattractive career path. In the coming years, the ability to successfully attract, train and retain young workers will become more critical and efforts will be required to ensure schools understand and promote the broad range of career options this industry offers.

The South Australian Transport and Logistics industry has a number of workforce challenges including the ageing workforce and thin training markets in some sectors like rail operation, rail infrastructure and aviation. Training is largely driven by legislative changes addressing safety issues including fatigue management, duty of care and national licensing requirements. For parts of the Road Transport industry, there is some reluctance to invest in training new entrants, due to the time and total investment it takes to fully train someone to operate independently as driver.

INDUSTRY PRIORITY QUALIFICATIONS (IPQ) TRANSPORT, POSTAL & WAREHOUSING

Tier 1 (Highest Priority)

Certificate III in Driving Operations
Certificate III in Logistics
Certificate II in Driving Operations
Certificate II in Warehousing Operations

Tier 2 (High Priority)

Certificate IV in Logistics
Certificate IV in Train Driving
Certificate IV in Transport and Logistics (Road Transport Heavy Vehicle Driving Instruction)
Certificate IV in Work Health and Safety
Certificate III in Maritime Operations (Marine Engine Driver Grade 2 Near Coastal)
Certificate III in Maritime Operations (Master up to 24 metres Near Coastal)
Certificate III in Stevedoring
Certificate III in Warehousing Operations
Certificate III in Waste Driving Operations
Certificate III in Work Health and Safety
Certificate II in Maritime Operations (Coxswain Grade 1 Near Coastal)
Certificate II in Road Transport Yard Operations (Freight Handler)
Certificate II in Logistics

References:

1. NTC, 2016 *Who Moves What Where - Freight and Passenger Transport in Australia*
2. <http://www.tdtsa.com.au/downloads/TDTSAPercent20Strategicpercent20Plan>
3. <http://www.tdtsa.com.au/downloads/TDTSAPercent20Strategicpercent20Plan percent202015percent20-percent202016.pdf>
4. <http://www.tdtsa.com.au/downloads/TDTSAPercent20Strategicpercent20Plan percent202015percent20-percent202016.pdf>
5. http://tlisc.org.au/wp-content/uploads/TLISC_134_E-Scan_lores_singlepages_FA.pdf



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Disclaimer: The material contained in this report has been developed by the Training and Skills Commission and was informed through a detailed survey of industry and consultations with key industry partners and groups. The information contained in this report does not necessarily reflect the views of the Government of South Australia or the Department of State Development, or indicate any commitment to a particular course of action.

The information contained in the report is provided in good faith and all reasonable care has been taken in its preparation. The Training and Skills Commission recommends users exercise care in interpreting this report and carefully evaluate the relevance of the material for their purpose and where necessary obtain appropriate advice specific to their particular circumstances.

A full copy of the Report on South Australia's Industry Priority Qualifications can be accessed electronically at: www.tasc.sa.gov.au

Images have been supplied by the Department of State Development and the South Australian Tourism Commission.

Acknowledgements: The Training and Skills Commission expresses its sincere gratitude to its key Industry Partners and industry stakeholders who responded to the IPQ survey and have provided detailed information to inform this report. The Commission also acknowledges the contributions of Joshua Rayner, Angela Niedorfer, Heidi Greaves and Ashley Bowker in producing this report.

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