TT&LWAG

# Industry Health Check Survey

# Report

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The Work Lab
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The Work Lab is a multi award winning social research and software development company. We supply services to manage skills.

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# Executive Summary

This report outlines the findings of an industry survey conducted on behalf of the Tasmanian Transport and Logistics Workforce Advisory Group (TT&LWAG) and commissioned by The Tasmanian Freight Logistics Council Limited (TFLC).

The purpose of the survey was to collect reliable data about current and potential workforce issues in the transport and logistics industry in Tasmania and to use those findings to propose actions and issues that should be further explored in an Industry Skills Plan.

The TFLC contracted the distribution and analysis of a pre-prepared survey instrument to research consultants, The Work Lab. A distribution list for the survey was also provided to the consultants.

The survey form was distributed via mailed hard copy and on the web during January and February 2010. Individual responses were encouraged by telephone follow up and through the efforts of individual members of the TT&LWAG. This effort resulted in a high response rate (>60%) providing responses that have a high level of statistical validity.

Key findings were:

- The Tasmanian industry has an ageing workforce –40% of the workforce is over 45 and only 11% under 25.
- Labour issues are more acutely felt with blue collar occupations, in particular difficulties were expressed in
  - Attracting new staff (this is compounded by high attrition levels)
  - Maintaining productivity with the existing skill base
  - Maintaining compliance with regulatory requirements.
- Across the industry recruitment difficulties were cited, these were due to a perceived lack of required skills amongst job seekers and compounded by work conditions (shift work etc) inherent in the industry.
- Very few companies cited problems retaining staff but 35% perceived this as likely to be an issue for them in the next 18 months.
- A significant list of occupations were forwarded as likely to cause recruitment problems in the next 18 months.
- Training, flexible hours and salary sacrificing were cited as common employee benefits.
- Training effort across the industry is generally focused on compliance skills and management development.

- There is low awareness of the National Training Package across the industry but some evidence of the use of competency standards for workforce development.
- No significant issues with current training delivery were provided.
- A significant list of constraints on doing business in Tasmania was provided, as well as a number of positives attributes, mostly lifestyle/value based
- There was good interest in remaining in touch with the group's work.

**The significance of these findings are:**

This research provides a current picture of the workforce issues faced by the Transport and Logistics industry in Tasmania. The findings represent 42% of the industry's workforce and 9% of the employing businesses. Statistically the responses are valid to a confidence level of 95% and a confidence interval of 11%. In plain english, as an example – when we say 30% of businesses have problems recruiting staff, we can be 95% confident that this is the case +/- 11%. I.e. we can be 95% confident that between 19% and 41% have problems recruiting.

Research of this nature has not been conducted in the last five years and is important given a back drop of heightened productivity concerns as a result of global economic conditions and labour supply constraints as a result of an ageing workforce and an ever increasing skills threshold.

**The limitations of these findings are:**

Alongside the standard limitations of any primary research (such as question bias, reliance on subjective response etc) this survey has a number of other limitations, namely:

1. Statistically, the survey covers approximately 9% of employing businesses and 40% of the workforce. It could therefore be argued that it only covers the big end of town – omitting input from the many micro businesses.

2. The survey was designed for quick response – with many questions prompting 'tick box' answers from a predefined list. Whilst this approach provided a good response rate it did not allow further depth of response to be provided.

3. Sample size and bias – the survey was distributed to a predefined audience 'hand picked' by members of the TT&LWAG. This clearly lead to a higher than normal response rate but at the same time risked/ omitted input from members of the industry not 'on the list'.

4. The survey was conducted with a stated promise that individual responses would not be identified in any reporting of responses. With a limited population from which the survey was taken, variable analysis was not possible because it would have created a situation where individual responses would be identifiable. For example, filtering all responses by a specific operator type e.g. rail would have the effect of removing confidentiality claims given that there was only one rail company operating in Tasmania.

# Recommendations

It is recommended that:

- This report is made widely available to the industry and agencies represented on the Tasmanian Transport and Logistics Workforce Advisory Group (TT&LWAG) and the Tasmanian Freight Logistics Council Limited (TFLC).

- The findings of this report be carried forward as a substantive component of a whole of industry Skills Plan.

- Case study activity form part of the Skills Plan to better understand:
    - Recruitment difficulties and perceptions of skill shortages;
    - Specific industry context that was not analysed for confidentiality reasons;
    - The use of competency standards and the national training system for workforce development purposes.

- The Skills plan input be enhanced to provide a more comprehensive picture of:
    - Skills supply and training effort provided to/for the industry;
    - The smaller end of town (small and micro businesses);
    - A national/ international context to the operations of the local transport and logistics industry;
    - Policy and regulatory issues facing the local industry.

- Constraints to doing business highlighted in this report not relating specifically to workforce development be further unpacked by the project sponsors and auctioned appropriately.

## Background

In total 69 responses were provided from a target list of 110 businesses. The following tables show the scope of the survey responses. Many respondents chose not to answer all questions (none were compulsory) and may questions allowed multiple choices to be made. Therefore response totals for each question do not necessarily add up to the total number for the survey.

Table 1: Mode of operation

| | **Response Percent** | **Response Total** |
|---|---|---|
| Logistics Management | 16.06% | 22 |
| Warehousing | 10.95% | 15 |
| Road Transport – Freight | 29.93% | 41 |
| Road Transport – Passenger | 2.19% | 3 |
| Maritime & Stevedoring | 11.68% | 16 |
| Aviation | 8.76% | 12 |
| Rail | 2.92% | 4 |
| Other | | 24 |
| Total Respondents: | | 68 |

(Note businesses could choose more than one area)

Table 2: Scope of operations

| | **Response Percent** | **Response Total** |
|---|---|---|
| Local | 67% | 45 |
| National | 33% | 22 |
| Total Respondents: | | 67 |

Table 3: Main region of operations

| | Response Percent | Response Total |
|---|---|---|
| West Coast | 4.79% | 7 |
| North West Coast | 20.55% | 30 |
| North | 30.14% | 44 |
| South | 30.14% | 44 |
| East Coast | 2.74% | 4 |
| Interstate | 7.53% | 11 |
| Overseas | 4.11% | 6 |
| Total Respondents: | | 69 |

Table 4: Response by business type

| | Response Percent | Response Total |
|---|---|---|
| Sole Trader | 11.27% | 8 |
| Private Company | 60.56% | 43 |
| Public Company | 8.45% | 6 |
| Regulator/ Government | 5.63% | 4 |
| Other | 14.08% | 10 |
| Total Respondents: | | 69 |

Table 5: Number of workers (table sourced from multiple questions)

| | White collar | Blue collar | Totals |
|---|---|---|---|
| **Permanent** | **1092 (42%)** | **1494 (58%)** | **2586** |
| **Casual** | **115** | **579** | **694** |
| **Outsourced** | **272** | **92** | **364** |
| **TOTAL STAFF** | | | **3644** |
| **Under 25** | **11%** | | 413 |
| **Over 45** | **40%** | | 1445 |
| **Women** | **15%** | | 535 |
| **Seasonal** | **1 response – 50 staff** | | |

As illustrated in the above tables the survey covered all areas of the state of Tasmania, had good representation across the various sectors of the industry and represented 3,644 employees. Based upon data from the Australian Bureau of Statistics the total number employed in Transport & Storage is estimated at 8,700[1] This survey therefore represents 42% of the total workforce.

[1] *Tasmania at a glance*, ABS, November 2007

## Methodology

The short research assignment (10 weeks in total) consisted of the distribution and collection of data from a provided list of businesses and contacts using a survey provided by the TT&LWAG. The Work Lab's role was primarily concerned with data collection, analysis and reporting. The stages in this process are outlined below.

Phase 1 – Preparation

1.1 Receipt of approval to proceed.

1.2 Preparation of survey form for web and paper delivery.

1.3 Receipt and import of contact database for communication and consultation.

1.4 Testing of survey materials.

1.5 Desktop research to collate appropriate statistics for sample size calculation.

Phase 2 – Data Collection

2.1 Distribution of survey materials to listed contact businesses and commencement of survey return activity.

2.2 Three rounds of phone and email reminders to elicit responses

Phase 3 – Data Analysis

3.1 'Cleaning' and input of data into data analysis software.

3.2 Presentation of preliminary findings to TT&LWAG

3.3 Discussion with TT&LWAG regarding priority areas.

Phase 4 – Report and presentation preparation

4.1 Preparation of draft report

4.2 Provision of draft report to client for review and feedback

4.3 Incorporation of feedback into report and delivery of final

## Sampling framework

Since the research population and survey instrument was provided as part of the assignment the sampling framework was developed post data collection to provide a measure of validity of the responses gained[2].

The validity of the responses collected can be viewed from two approaches:

1. Numbers employed

   The number employed in Transport & Storage is published at 8,700 in November 2007 (Source: ABS Tasmania at a glance).
   This survey represents 3,644 employees (42% of total)
   The survey therefore covers a large proportion of the industry total employment.

2. Numbers of businesses

   There are a total of 2,781 transport and storage businesses with their main business address in Tasmania, 2,108 (76 per cent) are small operators who do not employ staff. Of the total 763 employing businesses with their main business address in Tasmania, 680 employ 0-19 staff and 83 employ 20 plus.
   (Source: Australian Bureau of Statistics, Cat No 8161.0.55.001 Business Register, Counts of Businesses.)

   So, of 763 employing businesses the survey has responses from 69 or 9%.

On the basis of the above, the data collected is therefore valid to a confidence level of 95% and a confidence interval of 11%.

In non-statistical terms, as an example – when we say 30% of businesses have problems recruiting staff, we can be 95% confident that this is the case +/- 11%.... Ie we can be 95% confident that between 19% and 41% have problems recruiting.

[2] Sampling frameworks are normally developed prior to data collection to provide a target number of responses required to meet the desired validity.

# Key Findings

## Summary

The survey was categorised into six main areas:

1. Your company/organisation (results reported in previous section)
2. Your workforce (results reported in previous section)
3. Labour issues
4. Skill shortages
5. Workforce development
6. Constraints on growth and advantages of being in Tasmania.

The following pages highlight the key findings from the latter four sections of the survey. Where appropriate commentary on the critical areas requiring action or further investigation is provided. It should be noted that the survey suffered from significant drop out towards the tail end. To some extent this was anticipated in the survey design placing the more critical areas for investigation towards the front of the survey.

Key finding 1:  The impact of the labour market over the next 18 months

| White Collar | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **Very low** | **Low** | **No effect** | **Medium** | **High** | **Very high** | **Response Total** |
| Attracting staff with right skills and experience | 14% | 9% | 16% | 32% | 20% | 9% | 44 |
| Retaining staff | 21% | 21% | 14% | 17% | 19% | 7 % | 42 |
| Achieving or maintaining productivity with current staff levels and skills base | 18% | 14% | 11% | 25% | 18% | 14% | 44 |
| An aging workforce | 11% | 27% | 24% | 24% | 7% | 7% | 45 |
| Managing and skilling or mentoring a young workforce | 11% | 31% | 18% | 27% | 9% | 4% | 45 |
| Enterprise bargaining | 18% | 13% | 40% | 11% | 16% | 2% | 45 |
| Regulatory requirements | 13% | 18% | 13% | 27% | 18% | 11% | 45 |
| | | | | | | Total Respondents | 48 |

| Blue Collar | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **Very low** | **Low** | **No effect** | **Medium** | **High** | **Very high** | **Response Total** |
| Attracting staff with right skills and experience | 13% | 0% | 20% | 38% | 23% | 8% | 40 |
| Retaining staff | 19% | 14% | 19% | 25% | 14% | 8% | 36 |
| Achieving or maintaining productivity with current staff levels and skills base | 10% | 8% | 18% | 28% | 31% | 5% | 39 |
| An aging workforce | 8% | 21% | 18% | **28**% | 18% | 8% | 39 |
| Managing and skilling or mentoring a young workforce | 18% | 18% | 23% | 26% | 13% | 3% | 39 |
| Enterprise bargaining | 13% | 10% | 33% | 26% | 13% | 5% | 39 |
| Regulatory requirements | 3% | 13% | 18% | 31% | 26% | 10% | 39 |
| | | | | | | Total Respondents | 48 |

The impact of various labour issues on business operations over the next 18 months was asked in relation to both white collar and blue collar staff. With the exception of enterprise bargaining each of the issues listed were perceived as likely to have an effect on business operations in the next 18 months. The highlight issues are bolded in red in the above tables and described further below.

The key issues are presented in priority order:

1. The impact of regulatory requirements was seen as medium to very high impact amongst blue collar staff (67%) and to a lesser extent (58%) for white collar staff.
2. Attracting staff with the right skills and experience – 61% medium to very high impact for white collar staff and 69% for blue collar staff;
3. Achieving or maintaining productivity with current staff levels and skills base – 57% medium to very high impact for white collar staff and 64% for blue collar staff;
4. An aging workforce was not seen as a significant issue for white collar staff but 46% of medium to high impact for blue collar staff;
5. Retaining staff – 36% medium to high impact for both white and blue collar staff;
6. Managing and skilling or mentoring a young workforce was not seen as likely to have a major impact for either white collar or blue collar staff – relative to other issues listed.

## Key finding 2: High levels of attrition amongst blue collar staff

| | **Response Percent** | **Employees departed Total** |
|---|---|---|
| White Collar | 6.5% | 96 |
| Blue Collar | 15.6% | 333 |

Across all industries and occupations in Australia attrition rates average between 4-6%. In other words within a workforce approximately 1 person in every 20 leaves the organisation each year. With the Tasmanian transport industry this is the case for white collar workers with an estimated attrition rate of 6.5%. However, amongst blue collar staff the rate is 2.4 times higher at 15.6%. Put alongside the findings above in relation to adherence to regulatory requirements, maintenance/ development of productivity levels and an ageing workforce this finding is of concern.

## Key finding 3: Difficulties recruiting staff

Over the last 12 months, have you had difficult recruiting staff?

| | Response Percent | Response Total |
|---|---|---|
| Yes | 43% | 22 |
| No | 57% | 29 |
| | Total | 51 |

It is interesting to note that the majority of businesses had not had difficulty recruiting staff in the last 12 months, yet the reverse was true looking forward to the next 18 months. The tightening of the labour market as the economy recovers from the global financial crisis is likely to be behind this. Businesses who reported having had difficulty recruiting were asked to provide further information on the reasons. The responses can be categorised into three, firstly a lack of required skills in the labour market, secondly unattractive work conditions such as shift work and low wages and thirdly a small number of problems cited due to the specific and/or specialist occupations being recruited for.

Skill based recruitment problems:

- Lack of skilled operators x 7
- Driving Roles - Suitable qualifications
- Log Truck Drivers - mainly due to shift requirements and low wages
- Lack of truck drivers
- Drivers - experience / suitability Operators - experience / suitability

Work condition based problems

- Shift work, skill base & lack of suitable applicants
- Workforce conditions -lots of travel, pay rates
- Willing to work odd hours
- Blue collar - lack of applicants with skills willing to relocate
- Have problems recruiting skilled staff and also staff willing to work on weekends.
- Launceston - skilled people not available. Shift work
- Perception of industry not attractive to potential employees

Specialist occupation recruitment difficulties

- Skilled Marine Engineers difficult to recruit
- Sea staff - Antarctic

## Key finding 4: Retaining staff is not a problem

Over the last 12 months, have you had difficult retaining staff?

| | **Response Percent** | **Response Total** |
|---|---|---|
| Yes | 18% | 9 |
| No | 82% | 42 |
| | Total | 46 |

As previously noted in relation to recruitment, there is also a difference in historical experience with retaining staff and future perceptions. 18% of respondents reported having a problem retaining staff in the last 12 months, yet twice the percentage reported that this was likely to be a problem in the next 18 months. Those who did report problems with staff retention cited work conditions and higher salaries (elsewhere) as factors.

## Key finding 5: Perceived occupations in shortage over the next 18 months

The survey asked respondents to list up to five occupations believed to be in shortage over the next 18 months. The list provided was extensive with all occupations requiring as a minimum a licence or certificate to operate. The second general finding was that businesses were clearly expecting difficulty recruiting personnel with experience.

The list below summarises the perceived occupations in shortage over the next 18 months. Many of the occupations listed were counted on multiple occasions.

1. Accounting
2. Aircraft Engineers
3. Business Development
4. Crane operators
5. Drivers with appropriate licences
6. Engineers (Marine) with experience
7. Export Customer Service with experience
8. Fork lift operators
9. Frontline management
10. Heavy equipment operators
11. Import Customer Service with experience
12. IR'S Catering
13. Land Use Planners – Degree and experience

14. Locomotive Drivers
15. Logistics management
16. Transport administration
17. Marine Pilots Master class 1
18. Mechanical tradesmen
19. Operation manager
20. Plant operators
21. Plumbers with trade certificate
22. Project managers with experience
23. Quarrymen
24. Retail site managers
25. Sales with experience
26. Shipping Operations with experience
27. Ships Agency Import brokerage Export knowledge
28. Supervisors
29. Track drivers
30. Electrician Trades

## Key finding 6: Strategic approaches to human resource development

Prior to launching the survey members of TT&LWAG expected that recruitment and skill shortages were likely to be of major concern to their constituents. The working group was therefore interested to find out what measures were being taken by transport and logistics businesses to tackle these challenges. A set of three questions was asked,

1. To ask if companies had a formal strategic plan relating to workforce development issues and if so what this meant in practice – in terms of employee benefits and dollars committed to training;
2. A set of questions on training delivery;
3. Awareness and use of the national training system for workforce development.

The results were positive in terms of the numbers of companies who are clearly being proactive in relation to workforce development.

Does your company have a strategic human resource plan which includes formal recruitment, employee benefits and/or retention practices?

| | **Response Percent** | **Response Total** |
|---|---|---|
| Yes | 43% | 20 |
| No | 57% | 26 |
| | Total | 46 |

List the benefits that are currently available to your employees

| | **Response Percent** | **Response Total** |
|---|---|---|
| Salary sacrificing | 20% | 23 |
| Health cover | 4% | 5 |
| Job sharing | 15% | 17 |
| Flexible working hours | 22% | 26 |
| Working from home options | 12% | 14 |
| Training | 27% | 31 |
| Total Respondents: | | 39 |

What is your budget allocation for workforce training?

- Nil or minimal (15 responses)
- Dependent on requirement (7 responses)
- $1000 (2 responses)
- $3000
- $5000 (3 responses)
- $25,000
- $30,000

- $100,000
- $117,800
- $250,000

Clearly there are a number of companies who have a serious commitment to workforce development both in terms of formal planning processes and action evidenced by a commitment of an operating budget. Conversely there is evidence of a larger number of companies who have yet to commit to the challenge (but obviously perceive that they will experience problems in the future). It is therefore recommended that case study activity succeed these findings to provide exemplars and positive approaches that could provide some leadership in this area.

## Key finding 7: Training investment in the next 18 months

Companies that indicated that they will be investing in training over the next 18 months (60%) were asked to specify the likely type of training. As illustrated in the list below forecast training effort is likely to be in one of two areas:

1. Compliance focused – providing required licences and/or certificates to operate
2. White collar occupation professional development.

Specific like courses have been grouped for ease of presentation.

Compliance focus

- B double licences
- Plant tickets
- Driver / operator cert / licences
- Crane licences
- Mandatory training as per industry standard
- Dogman License
- Load restraint
- Mass Management
- Trade certificate (diesel fitting - welding)
- Various industry inductions
- Confined space
- Dangerous goods handling
- Dangerous goods training
- Fatigue Management
- First aid training
- Fork lift

- Occupational Health &Safety
- Safe lifting

Professional development

- Front line Management
- Supervisor Courses
- Internal employee re-induction training with revised Employee manual
- In house online training college for administration and managerial staff
- Computer courses
- General stewardship training
- Leadership
- Management Development

The listing above is arguably short in the area of skills related to productivity improvement. As noted in finding 1, achieving or maintaining productivity with current staff levels and skills base is seen as having a medium to very high impact for 57% for white collar staff and 64% for blue collar staff.

The commonly perceived scenario of a tightened labour market (less skills available), an ageing workforce with above average levels of attrition and the increasing challenge of retaining staff, has the ability to impact on the industry.

As outlined in this report, maintaining productivity with current skill levels will arguably require an additional skills effort above and beyond compliance training. Some of the qualitative aspects of labour productivity such as creativity, innovation, teamwork and improved quality of work output are competencies holistically provided for under the national training system qualifications and training packages. The transport and logistics industry has its own specific training package.

## Key finding 8: Training package and competency standards

Are you aware of the Transport & Logistics National Training Package?

| | **Response Percent** | **Response Total** |
|---|---|---|
| Yes | 37% | 17 |
| No | 63% | 29 |
| | Total | 46 |

Similar research pieces conducted by the Work Lab over the last decade would suggest that the level of awareness of a national training package across all industries is normally within the range shown in this table. However, given the over dominance of large business in this research a far higher awareness was expected. Alongside its utility for the vocational training sector as assessment criteria training packages also provide very useful benchmark documents for industry in their description of competency standards, work tasks and performance requirements. Many companies across Australia use these competency standards to underpin position descriptions and workforce development activity. This would seem to be the case in the Tasmanian Transport and Logistics industry with half of respondents indicating that competency standards are used for workforce development activity.

Do you use competency standards for workforce development?

| | **Response Percent** | **Response Total** |
|---|---|---|
| Yes | 50% | 23 |
| No | 50% | 23 |
| | Total | 46 |

It is therefore recommended that case study activity succeed these findings to provide exemplars of the use of competency standards for workforce development. These exemplars may assist the industry to better connect with the vocational training system to assist with recruitment, retention and productivity issues.

## Key finding 9: Issues with training availability or delivery?

Advocating a stronger connection between the vocational training sector and industry workforce development is strengthened by a positive (historical) view of the existing relationship between industry and the training sector that services it. It was therefore heartening to note that 85% of respondents had no issues with the efforts of the training sector.

The comments provided by the small number of companies (7) that did have specific issues were:

- Training availability not conducive to shift work environment, difficult to allocate people to courses;
- Information on training and where to get it can sometimes be a problem;

- Training available. Industry does not know where to look - they have to try and source the information themselves. We would expect that training organisations would approach logistics firms;
- Some issues finding quality IT training from local suppliers;
- There is no one who seems to be able to help, being in a remote area.

The final section of the survey was provided as an avenue for Tasmanian companies to provide more general feedback on business related issues to the Tasmanian Transport and Logistics Workforce Advisory Group (TT&LWAG) and The Tasmanian Freight Logistics Council Limited (TFLC). Respondents were asked to note any significant constraints growing their business in Tasmania and also to note the best things about working in the industry.

The comments to these questions are provided verbatim but have been grouped according to subject matter. It is recommended that the comments be further unpacked by the research sponsors and dealt with appropriately.

## Key finding 10: Constraints to business growth

**Policy related**

1. Size of market, lack of past investment, lack of clear transport policy and infrastructure fund to match.
2. There is relatively slow growth in the sector and there could be more Gov't initiatives targeting TLI.
3. General competitiveness needs to be addressed for the sector to remain viable - high costs of freight and handling add to general industry costs and as such make local businesses internationally and nationally not competitive. The logistics sector is a servicing sector not and end in itself.
4. Lack of industry development, new business.
5. The constraints to growing our business is the timely shipping capacity across Bass Strait.
6. Planning and approval processes for developments.
7. Total lack of plan to enhance confidence in the Transport industry when you consider Bell Bay port v Burnie port favours. Far too much political influence affecting transport infrastructure decisions adding to general unrest in the international shipping sector and Tasmanian Importers/Exporters.
8. Lack of in depth statewide infrastructure plan. Also a lack of government support or backing on major issues affecting the Tasmanian transport industry.
9. There is no government support unless you transport over water.
10. Fuel levy & Southern Tasmania road conditions.

11. Transport regulations and the difference in state regulation Vic, South Aust. and NSW.

**Infrastructure**

1. High costs of infrastructure.
2. Lack of good rail infrastructure.
3. Port and rail operations.
4. Better Rail infrastructure
5. YES- rail access to the Bellbay port from the North West and South. Vessel draft restrictions at the Bellbay port.
6. Address the rail issue to and from Bell Bay to Hobart competition is critical and healthy to everyone. To move more and more cargo to the road makes no sense Increase rail capacity as small customers are being bumped for large entities Promote and sell the rail - we've never had a visit from anyone Expand the Burnie port (its possible) as wait times are impacting on business activities.
7. Rail, road and shipping decisions impact heavily on the operations of our business.
8. Lack of B-Double routes.

**Economic environment**

1. Land tax, continual increase in registration charges & payroll tax. The greatest disincentive to grow a business in this state is the fact that for the privilege we have in employing people is we then get taxed for it.
2. Reliability of Freighter aircraft. Tighter regulation of smaller players to ensure a level playing field.
3. For my Company to expand I need to buy modern vehicles. Without some sort of monetary assistance from the Govt.(grant or low interest loan) it is extremely difficult despite the fact that my Co. has proven to be very successful(have doubled total income since buying it two years ago.
4. Threat to international carriers calling Tasmania.
5. Too much competition.
6. Helping companies like Gunns to sell more pulp etc
7. Forest Industry downturn and global economic impact on such downstream.
8. Impact of Financial institutional restraints due to global economic environment. Increased competition due to limited market size.

**Human Capital**

1. Lack of skilled employees in both white and blue collar roles. Industry needs to try and improve industry profile.
2. Remove the Rudd government and their workplace legislation! A huge backward step that that we haven't seen the results of yet!

3. Lack of knowledge of sector lack of knowledge of training available here
4. Pre employment training

## Key finding 11: The best things about working in the Industry?

- The challenge, the can do attitude and the people.
- Location friendliness networking.
- Good shipping access. Rail infrastructure. Growing export.
- Working with companies who care about service. The challenge of importing and exporting globally. Assisting business to grow.
- Constant challenge of working in an ever changing industry. The diversity of the workforce.
- Variety of job opportunities, flexible hours and good pay/conditions.
- Clients workforce culture lifestyle.
- Competitive, high risk, Capital intensive.
- People, no interstate work, local knowledge.
- Relationships because of the relative small population base. In our case, almost zero staff turnover as they are settled. Lifestyle for both Employers & Employees.
- Being able to tour the state (and get paid for it), Job satisfaction, Meeting people on jobsites.
- Loyalty, Ease of access Flexibility.
- Tasmania is unique in its operations. Tasmanian logistics is also a close knit community.
- Ability to provide good service to industry. Networking opportunities. Being recognised as a preferred employer.
- Sharing of knowledge and contacts, shorter operating distances. Customers varied and spread in three definite areas.
- Proximity of key locations. Attitude to training generally positive. Good people clients, contractors and drivers.
- Closeness of industry to government officials. Openness to innovation. Ability to provide improved services to a lacking industry.
- Limited hours for driving.
- Distance travel requirements are not too great, public recognise the good operations who supply the service, the 24/7 requirements of the mainland has still not impacted on Tas to the level where workers and companies can still experience "A LIFE".
- Safe industry to work in, Dynamic work environment, Good pay and conditions.
- Ability to build closer relationships with customer base. More manageable distances to co-ordinate freight. Opportunity to work in Companies with exposure to all facets of the industry and not limited to one aspect.
- Provides a comfortable lifestyle for us.

- Ability to be known in your field of expertise. Ability to transfer your skills within the state. Unlimited resources for training and enhancement (Subject to employment opportunities for "on the job" training).
- Close knit community easy to get things done.
- Local knowledge, Local people, Networking.
- People, place & willingness to accept change to enhance business and maintain job security.
- None - it just has to work effectively as part of the supply chain process to service Tasmanian industry - its a service sector - if you want an exciting logistics business work in China!

Would you like us to keep you informed of workforce updates and future networking opportunities?

| | **Response Percent** | **Response Total** |
|---|---|---|
| Yes | 59% | 23 |
| No | 41% | 16 |
| | Total | 39 |

## Conclusion

This report outlines the findings of the 2009 Tasmanian Transport and Logistics Industry Workforce Health Check Survey. The survey was conducted during January and February 2010 and was completed by 69 companies – providing good representation across all dimensions of the industry and a statistically valid sample from which to extrapolate findings.

The research uncovered positives in terms of a high awareness of workforce development as an enabler of future prosperity and a number of potential leaders amongst industry from which others could learn. The research also uncovered a number of inter-related challenges facing the industry in terms of recruitment difficulties, skill shortages, high levels of attrition and an ageing workforce.

## Organisations consulted

The survey provided an optional question for companies to provide their name. Of the 69 responses 32 did so. Their names are listed below:

- AMC
- Australian Ground Services Pty Ltd
- BIS Industrial Logistics
- Cooley's transport p/l
- de Bruyn's Transport
- Driver Safety Services
- Freight Connections Pty Ltd / Tas Cargo
- K J & E Honan Pty Ltd.
- Kevin Morgan Pty Ltd
- King Island Airlines
- Lachmitch transport
- Learning Partners
- Lloyds North
- McCathy Transport
- MISC Agencies Australia
- Moore transport solutions
- MSC
- OOCL (Australia) Pty Ltd
- Prices Transport
- R & I Transport
- SeaRoad Logistics
- SRT Logistics
- St Helens Kool Freight
- Statewide Independent Wholesalers Ltd
- Streeflands Transport
- Tasfast Airfreight Pty Ltd
- Tasmanian Railway
- TNT - Peter Wicks
- Trade Development Resources
- TRANSMO
- Western Express Freight Trust
- Willard Estate Logistics

# Survey Instrument

**GOING PLACES IN TASMANIA**
**2009 Tasmania Transport and Logistics Industry Workforce Health Check Survey**
**- Confidential -**

**Thank you for taking the time to participate in the first comprehensive health check of the Transport and Logistics industry's workforce in Tasmania for some time.**

**This survey is being undertaken by the Tasmania Transport and Logistics Workforce Advisory Group, which consists of government and industry representatives.**

**The objective of the survey is to collect information to assist with identifying current and potential workforce issues and to use this information to develop a workforce strategy for the industry.**

*The information collected in this survey will be treated confidentially and no information on individuals or specific businesses will be disclosed or reported.*

## YOUR COMPANY/ORGANISATION

### 1. What type of organisation do you work for?

❑Sole Trader
❑Private Company
❑Public Company
❑Regulator/Government
❑Other: (Specify) . . . . . . . . . . . . . . . . . . . . . . . . . . . .

Is this a local or national company?
❑Local
❑National

### 2. What is your main industry sector? *(if more than 1, please estimate percentage of your business in each sector)*

| | |
|---|---|
| | Logistics Management |
| | Warehousing |
| | Road Transport – Freight |
| | Road Transport – Passenger |
| | Maritime and Stevedoring |
| | Aviation |
| | Rail |
| | Other: (Specify) . . . . . . . . . |

| |
|---|
| |

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**3. In which of the regions or areas is your business property located?** *(if more than one region, number in order, i.e. 1 = main office, 2 = 2nd largest office, etc.)*

| | |
|---|---|
| | West Coast |
| | North West Coast |
| | North |
| | South |
| | East Coast |
| | Interstate |
| | Overseas |

## YOUR WORKFORCE (Tasmania Only)

**4. How many people work in your organisation?** *(number of approved positions even if the workload is outsourced)*

| | White Collar | Blue Collar |
|---|---|---|
| Permanent | | |
| Casual | | |
| Outsourced | | |

**5. How many employees do you have under the age of 25?**

**6. How many employees do you have over the age of 45?**

**7. How many women work in your organisation?**

**8. Do you employ seasonal workers?**

❑Yes
❑No
If yes, how many do you employ, for what purpose, and at what time of the year:
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
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**LABOUR ISSUES** (Tas based only)

**9. For each of the following labour issues, please rate the potential impact over the next 18 months on your business:**

| | White Collar | Blue Collar | *(very low, low, medium, high, very high)* |
|---|---|---|---|
| Attracting staff with right skills and experience | | | |
| Retaining staff | | | |
| Achieving/maintaining productivity with current staff levels and skills base | | | |
| An aging workforce | | | |
| Managing and skilling/mentoring a young workforce | | | |
| Enterprise bargaining | | | |
| Regulatory requirements | | | |
| Other (Specify): . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . | | | |

**10. In the last 12 months, how many of you company's staff has turned over?**

| White Collar | Blue Collar |
|---|---|
| | |

**11. Over the last 12 months, have you had difficulty recruiting staff?**

❑ Yes ❑ No

**If yes, please list the positions and indicate the major reason for difficulty:**

| **Occupation** | **Major Reason** *(i.e .lack of applicants, salary, skilled people not available, shift work, workforce conditions)* |
|---|---|
| | |
| | |
| | |
| | |

## 12. Over the last 12 months, have you had difficulty retaining staff?

❑ Yes ❑ No

**If yes, please list the positions and indicate the major reason for difficulty:**

| Occupation | **Major Reason** *(i.e .lack of applicants, salary, skilled people not available, shift work, workforce conditions)* |
|---|---|
| | |
| | |
| | |
| | |

## SKILLS SHORTAGE

A skills shortage exists when the demand for works in a particular occupation is greater than the supply of workers who are qualified, available and willing to do work under existing market conditions.

## 13. List up to five occupations in your main business sector (in order of priority) that you believe you will experience a skill shortage with during the next 18 months?

| Occupation | Position Title | **Position Entry Level and/or Years of Experience** *(A = no experience; B = Certificate, Diploma, Trade; C = Tertiary Qualifications)* | Major Reasons |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

## WORKFORCE DEVELOPMENT

## 14. Does your company have a strategic HR plan which includes formal recruitment, employee benefits and/or retention practices?

❑ Yes ❑ No

**If yes, please list the benefits that are currently available to your employees:**

| | |
|---|---|
| | Salary sacrificing |
| | Health cover |
| | Job sharing |

| | |
|---|---|
| | Flexible working hours |
| | Working from home options |
| | Training |
| | Other (Specify): . . . . . . . . . . . . . . . . |

**15. Does your company offer staff training?**
❑Yes ❑No
If Yes, what training will your company be investing in over the next 18 months:
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
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If No, why:
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
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Are you aware of the T&L Training Package available?
❑Yes ❑No

Do you use the competencies for workforce development?
❑ Yes ❑No

What is your budget allocation for workforce training?

**16. Do you have any issues with training availability or delivery?**
❑ Yes ❑ No
If Yes, please comment:
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
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## CONSTRAINTS ON GROWTH

**17. Are there any significant constraints in Tasmania to growing your business?** *(i.e. what does government, industry and others need to address?)*

1. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
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3. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
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## ADVANTAGES

**18. What are the 3 best things about working in Tasmania Transport and Logistics Industry?**

1. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
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2. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
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3. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
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## CONCLUSION

**19. Do you have any other suggestions or feedback?**

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**20. Can we contact you later to explore your responses to this survey?**

❑ Yes ❑ No

**21. Would you like us to keep you informed of workforce updates and future networking opportunities?**

❑ Yes ❑ No

Thank you for our time and input.