



BC Trucking Association Human Resource Employer Survey Project

**Final Report Prepared for the BC Trucking
Human Resource Planning Committee**
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EXECUTIVE SUMMARY

PURPOSE OF THE PROJECT

The purpose of this project was to conduct a survey of trucking employers in BC to investigate more deeply the specific skill gaps, human resource requirements and HR practices of other careers in the BC trucking industry and to validate the projected professional driver shortage in BC. The findings of the research will be used to inform the BC Trucking Human Resources Planning Committee regarding its Strategic Human Resource Plan and, possibly, its training standards project and piloting of a new Professional Driver training program.

METHOD OF STUDY

The major steps that we undertook in the completing this project included:

- Conducted a detailed review of available statistics, studies and previous employer surveys on the trucking industry in BC and Canada.
- Prepared the survey instrument and the population list of companies from which the sample was selected.
- Developed an online version of the questionnaire (www.bctrucking.ca). A letter, with the link to the website, was distributed to the employers for whom we had e-mail addresses.
- Obtained approval of the questionnaire and sampling strategy from the BC Trucking Human Resource Planning Committee.
- Obtained input from 413 trucking industry organizations which employ Class 1 drivers, including 398 who were interviewed by telephone and 15 who responded to the online survey.
- Tabulated and analyzed the survey results and prepared this draft report that contains the study findings, conclusions and recommendations

MAJOR FINDINGS OF THE EMPLOYER SURVEY

The major findings of the employer survey are as follows:

1. The BC trucking industry reports significant difficulties in hiring Class 1 Drivers.

The 413 companies we surveyed employ 9,473 Class 1 drivers (an average of 22.9 drivers per company), most of whom are either company drivers (59%) or owner-operators (38%) contracted by the company. Some indicators of the demand for and shortage in Class 1 drivers include:

- Most companies (70%) hired at least one Class 1 driver over the past 12 months. In total, the companies reported that they hired 2,485 Class 1 drivers over the past 12 months which represents an average of 6.0 drivers per company surveyed.

- 38% of the companies indicated that they would have hired even more drivers over the past 12 months if they had been available. The companies reported that they would have hired an average of 8.8 per company which represents an increase of 46% over the number reported to have been hired.
- Forty-six percent of the companies would hire or contract with additional Class 1 drivers on a full-time basis right now if they were available (an average of 2.5 drivers per company).
- Most companies (71%) expect to hire or contract with Class 1 drivers on a full-time basis over the next 12 months (an average of 4.9 drivers per company).
- When asked to rate how difficult it will be to meet their hiring needs for Class 1 drivers over the next year, over two-thirds of respondents believed it will be difficult or very difficult. On a scale of 1 to 5, where 1 is not at all difficult and 5 is very difficult, the average rating given by the employers was 3.9.

2. Although less significant, the trucking industry also reports hiring difficulties related to other occupational areas including fleet maintenance, dispatch & operation, and dock & warehouse operations.

Of the 413 companies surveyed, 93% employ people in dispatch & operation, 44% employ people in fleet maintenance, and 29% employ people in dock & warehouse operations. Because of the presence of some large warehouse operations, dock & warehouse operations account for the highest numbers of existing positions, new hires, existing vacancies, and expected openings over the next year among these three occupational areas.

Positions related to fleet maintenance are considered the most difficult to fill. When asked to rate how difficult it will be to meet their hiring needs in these occupational areas on a scale of 1 to 5, where 1 is not at all difficult and 5 is very difficult, the employers who expect to hire staff over the next year provided an average rating of 3.8 for positions in fleet maintenance, 3.2 for positions in dispatch and operation, and 2.9 for positions in dock and warehouse operations. In the area of fleet maintenance, heavy-duty mechanics and general mechanics were most frequently identified as the toughest positions to fill. In the area of dock and warehouse operations, some of the toughest positions to fill include forklift operator, dock worker, and warehouse personnel/supervisor. In the area of dispatch and operations, dispatchers and customer service representatives were identified as the toughest positions to fill. Apart from positions these three occupational areas, other positions that were identified as tough to fill include bookkeeping/accounting personnel, salespersons, managers, and heavy duty equipment operator.

3. In terms of magnitude, the primary human resource shortage in the BC trucking industry is for Class 1 Drivers.

One objective of the project is to estimate the magnitude of the shortages. Using the population lists we developed, secondary data on fleet sizes, and the results of our survey, we estimate that there are about 2,000 companies in our target population and that these companies currently employ almost 30,000 Class 1 drivers and would hire over 3,000 more if they were available today.

PROJECTED EMPLOYMENT BY OCCUPATIONAL GROUP

| Employment | Class 1 Drivers | Dock & Warehouse | Dispatch & Operations | Fleet Maintenance |
|----------------------------|------------------------|-----------------------------|----------------------------------|--------------------------|
| Currently Employed | 29,163 | 6,699 | 6,080 | 1,958 |
| Hirings in Past 12 Months | 7,650 | 4,079 | 1,004 | 351 |
| Number Would Hire Today | 3,180 | 674 | 274 | 108 |
| Projected Hiring This Year | 6,222 | 2,414 | 523 | 274 |

The projected shortages in the other occupational categories (as defined by the number of workers that the companies would hire today if they were available) include about 700 dock and warehouse workers, 275 dispatch and operations workers, and 100 fleet maintenance workers. These figures certainly do not reflect the full magnitude of the shortages in these positions in BC because there are many other organizations which employ workers in these occupational groups that do not fit within the definition of the target for this survey (e.g. there are many warehouse operations, transportation companies, and fleet maintenance operations which do not employ Class 1 drivers).

4. Various factors including limited skills levels and experience, working conditions, and strong competition for workers contribute to the existing shortages.

The employers identified a range of major barriers or constraints to meeting hiring needs for Class 1 drivers and other positions including:

- Many of the potential applicants are under-qualified, lacking the necessary skills, training, or practical experience needed.
- Working conditions and nature of the job make it difficult to attract people. Some issues related to attracting Class 1 drivers include long, irregular hours, the need for overnight travel, concerns about border crossings, being away from home, the unsteady or seasonal nature of the job, and the physical requirements.
- There is strong competition from other employers, regions and sectors.
- Expectations regarding compensation are high and increasing.
- The image of the industry limits its appeal to youth.
- The existing workforce is aging.
- Staff turnover rates are high reflecting limited commitment to the employer.

5. Most companies (58%) anticipate that, over the next two to three years, it will become even more difficult for trucking organizations in BC to attract the workers they need.

Continued economic growth is expected to increase the demand for workers. Only 10% of the companies expect it to become less difficult to attract workers. Those who indicated that conditions will either stay the same or improve generally anticipate that there will be an economic slowdown in key sectors, particularly construction, forestry, and other natural resource sectors.

6. Thirty percent of employers see increased opportunities for hands-on, practical experience as the greatest need for improvement in the training programs which serve the trucking industry.

Employers expressed some concern that the training offered at local driving schools only trained students in basic truck operation skills but did not give them practical skills in areas such as tying

down wide loads, air brakes, and mountain driving. Other common recommendations for improvement included:

- Extending the length and scope of training, possibly including a graduated licensing program;
- Placing increased focus on road safety;
- Placing increased focus on technical skills training such as pre and post trip inspection, and basic maintenance; and
- Increasing access to apprenticeship programs which allow trainees to gain practical experience while working.

To improve the performance of their staff, most (88%) trucking companies in BC offer at least some kind of training support. The most commonly offered types of training in BC focus on a general orientation to the company (73%), mentoring for new drivers (73%), safety training (69%), handling of hazardous materials (37%), and technical training (36%)

7. Trucking companies use a variety of strategies in an attempt to address shortages.

The strategies most commonly identified included:

- Providing training to enable applicants to fill the positions or progress in the organization;
- Offering competitive salary and benefits;
- Advertising job openings; and
- Networking with industry associations and other organizations (3%).

When asked what assistance, support or tools would be helpful in addressing these shortages, companies recommended increasing access to apprenticeship and training programs, working to improve the image and promote the industry to youth, and providing incentives to encourage companies to get more involved in providing training.



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I. INTRODUCTION

A. BACKGROUND

With the support from British Columbia Trucking Association (BCTA), Teamsters Local 31, Service Canada, and the industry, the BC Trucking Human Resources Planning Committee was established in February 2006 to address skilled worker gaps and recruitment and retention challenges. The objectives of the Committee are to ensure an adequate supply of qualified candidates, encourage and promote new entrants to the industry, research issues related to retention of workers, act as a resource in support of industry training and development programs, and ensure an appropriate level of training and licensing is in force to provide safe and qualified drivers. Since August 2006, the Committee has completed three major research projects to obtain a thorough understanding of human resources challenges within BC trucking industry. These projects include:

- An environmental scan of truck driver training systems and best practices across Canada and the United States;
- A trucking industry career communications and marketing plan; and
- A review of commercial driver licensing testing and standards in BC with comparison to other jurisdictions.

With the findings of these projects and the nation-wide industry survey results done by the Canadian Trucking Human Resources Council (CTHRC) both indicating several human resources challenges facing the BC trucking industry, the Committee has initiated this survey of employers to develop a better understanding on key occupational shortages (in addition to Class 1 drivers) of the BC trucking industry and to confirm the skills shortages identified by the research findings of the CTHRC.

B. PURPOSE OF THE PROJECT

The purpose of this project is to conduct a survey of trucking employers in BC to investigate more deeply the specific skill gaps, human resource requirements and HR practices of other careers in the BC trucking industry and to validate the projected professional driver shortage in BC. The findings of the research will be used to inform the BC Trucking Human Resources Planning Committee regarding its Strategic Human Resource Plan and, possibly, its training standards project and piloting of a new Professional Driver training program. The specific research questions to be addressed in the employer survey are as follows:

- What is the magnitude of the shortages identified for Class 1 drivers?
- For which other occupations (in addition to Class 1 Driver) are there current and projected shortages? What is the magnitude of the shortages identified for these occupations?
- According to the companies, what factors are contributing to these shortages?
- What actions are companies taking to address these shortages?
- What are the training practices and needs of the companies?
- How do the findings vary depending upon the characteristics of the employer organizations?

C. METHOD OF STUDY

We conducted this project in two phases. The purpose of Phase I was to prepare a detailed work plan which was then implemented in the second phase of the project. This section provides an overview of the work we completed to prepare the report, the target population for the survey, and the characteristics of the companies which participated.

1. Summary of Work Completed

To undertake the assignment, we:

- **Conducted an initial meeting with the BC Trucking Human Resource Planning Committee to clarify the scope of the study and the specific outputs desired.** During the meeting, we obtained feedback on our proposed approach and discussed the objectives of the project, the sectors and occupations to be included, development of the sample, the questionnaire, administration of the survey, key sources of information on the characteristics sector, communication plans, and next steps.
- **Conducted a detailed review of available statistics, studies and previous employer surveys of the trucking industry in BC and Canada.** The documents that we have reviewed included:
 - ❑ BC Trucking Industry Strategic Human Resources Plan, BCTA, June 2007
 - ❑ BC Trucking Joint Industry Committee Career Communications and Marketing Plan, November 2006
 - ❑ BC Trucking Association Website information
 - ❑ BC Work Futures – Occupational Profile of Motor Vehicle and Transit Drivers
 - ❑ Truck Activity in Canada – A Profile, Transport Canada, March 2003
 - ❑ Canada’s Driving Force Phase I and II, Canadian Trucking Human Resources Council
 - ❑ Transportation in Canada 2006 Annual Report, Transport Canada
 - ❑ An Introduction to Today’s Trucking Industry, Canadian Trucking Alliance
 - ❑ Truck Driver Training: Research Report on Training Standards & Systems, Sylvia Holland, November 2006
 - ❑ On the Road Again, Statistics Canada
 - ❑ Trucking in Canada, 2005, Statistics Canada

We used the results of the review to develop a profile of the trucking industry, which is provided in Chapter II.

- **Prepared the survey instrument utilized to conduct a survey of employers.**
- **Developed a population list of companies from which the sample was selected.** The preliminary population list consisted of a BCTA’s contact list of 402 members and 499 non-members, plus an additional 1,853 trucking companies that our survey team extracted from various business directories and industry websites.
- **Developed an online version of the questionnaire (www.bctrucking.ca).** A letter, with the link to the website, was distributed to the employers for whom we had e-mail addresses.
- **Prepared an analytical framework for the assignment.** The analytical framework stipulated how the information collected from employer surveys will be used to develop conclusions and

recommendations regarding each of the research questions. We also defined the cross-tabulations required to analyze the information to be collected.

- **Conducted a conference call with the Planning Committee to review the draft survey instrument, sample selection methodology, and work plan.** Based on the feedback obtained, we made some revisions to shorten the length of the questionnaire.
- **Conducted telephone interviews with representatives of 6 trucking companies to undertake a pre-test of the survey instrument.** Based on the responses obtained, we made a few final modifications to the survey instrument. A copy of the final telephone questionnaire is provided in Appendix I.
- **Conducted a survey of a sample of approximately 400 trucking employers.**
- **Tabulated and analyzed the survey results.** We employed statistical software package to compile and tabulate the survey results.
- **Prepared this draft report that contains the study findings, conclusions and recommendations.**

The next step will be to obtain feedback on the draft report from the Human Resources Planning Committee. We will undertake any additional analysis or research to address the comments received and then prepare the final report of the study findings, conclusions and recommendations.

2. Description of the Target Population

The target population to be surveyed consisted of organizations that employ Class 1 Drivers in British Columbia, including employees, owner-operators, and agencies. Some sources estimated that there are as many as 20,000 trucking companies in British Columbia. However, our target population was much smaller than this. Most trucking companies are, in fact, owner-operators or companies which have no employees at all. We did not target single owner-operators for interviews because they do not employ other truck drivers and may be counted in the employment figures provided by the larger employers, which would result in double counting.

According to ICBC data, there are 2,392 organizations in BC that have 5 or more vehicles out of the reported provincial total of 17,443 organizations or individuals who have a National Safety Code and one or more trucks. Depending upon the nature of their business, some of the companies counted as trucking companies will not, in fact, employ Class 1 drivers. According to Statistics Canada data, there are 4,224 truck transportation companies in BC with employees of which only 1,185 companies have 5 or more employees (again, some of these companies will not employ Class 1 drivers).

We roughly estimated that there are 2,500 organizations in BC that would represent targets for interviews. We developed a sample list of organizations to be targeted which included over 2,700 entries from about 2,400 different organizations (some organizations have operations in more than one community and may be listed more than once). The objectives of the survey, in terms of the respondents, were to:

- **Obtain input from approximately 400 trucking organizations.** Assuming a total population of 2,500, a sample of 400 employers provides statistically significant results at a confidence level of 95% and a confidence interval of $\pm 4.5\%$.
- **Maximize the coverage of the sample.** We placed highest priority on completing interviews with companies known to employ larger numbers of Class I drivers. Prior to the survey, we had fleet

size data for approximately about 950 of the organizations based in BC (which is summarized below). These organizations report using almost 20,000 trucks. The data highlights the importance of reaching the largest operators – the largest 9% of companies for which we had fleet data prior to the survey accounted for 45% of the trucks.

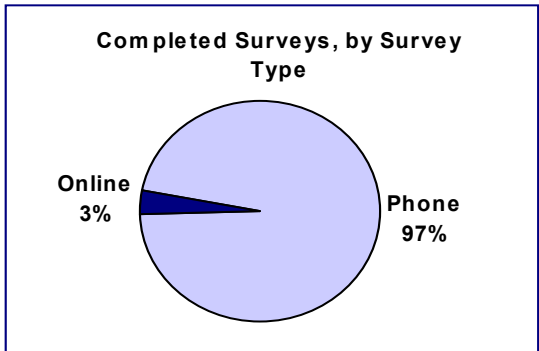
**COMPANIES FOR WHICH WE HAD FLEET DATA
PRIOR TO CONDUCTING THE SURVEY**

| Size | Companies | | Trucks | |
|--------------|-----------|------|--------|------|
| | Number | % | Number | % |
| Less than 10 | 457 | 48 | 2,423 | 12 |
| 10 to 25 | 312 | 33 | 4,925 | 25 |
| 26 to 49 | 99 | 10 | 3,477 | 18 |
| 50 to 100 | 53 | 6 | 3,498 | 18 |
| Over 100 | 30 | 3 | 5,223 | 27 |
| Total | 951 | 100% | 19,546 | 100% |

- **Achieve regional representation.** We targeted completing interviews with a minimum of 40 companies in the southern interior, northern interior and on Vancouver Island.
- **Include both members of the BCTA and non-members.** The BCTA provided us with a list of 402 companies which are members of the organization and fit within the target population.

3. Profile of the Companies Surveyed

We obtained input from 413 employers, including 398 who were interviewed by telephone, 14 who responded to the online survey, and 1 who completed by fax. Of the 413 employers surveyed, 181 (44%) were BCTA members and 232 (56%) were non-members. To complete the survey, we attempted to contact 1,222 companies of whom:



- 413 participated in the survey;
- 406 indicated that they employ no Class 1 drivers;
- 109 refused to participate;
- 167 had numbers which were not in service or had moved; and
- 127 could not be reached (answering machine or no answer).

The characteristics of the employers who participated in the survey are summarized below in terms of size of fleet, types of trucks in the fleet, regions served, type of operation, regions located, total number of employees, number of Class 1 drivers, and Class 1 drivers as a percentage of total staff.

PROFILE OF EMPLOYERS SURVEYED

| Profile | Categories | Frequencies | Percent |
|---------------------------|--------------|-------------|---------|
| Size of Total Fleet in BC | Less than 10 | 164 | 40% |
| | 10 to 25 | 148 | 36% |
| | 26 to 49 | 55 | 13% |
| | 50 to 99 | 27 | 7% |
| | 100 and over | 18 | 4% |
| | No Response | 1 | 0% |

| Profile | Categories | Frequencies | Percent |
|----------------------------------|---------------------------|-------------|---------|
| | Total | 413 | 100% |
| | Average Per Organization | 25.0 | |
| Number of Tractor Trailer Trucks | None | 27 | 7% |
| | Less than 10 | 178 | 43% |
| | 10 to 25 | 127 | 31% |
| | 26 to 49 | 44 | 11% |
| | 50 to 99 | 21 | 5% |
| | 100 and over | 15 | 4% |
| | No Response | 1 | 0% |
| | Total | 413 | 100% |
| | Average Per Organization | 20.8 | |
| Number of Straight Trucks | None | 220 | 53% |
| | Less than 10 | 143 | 35% |
| | 10 to 25 | 39 | 10% |
| | 26 to 49 | 6 | 2% |
| | 50 to 99 | 3 | 0% |
| | 100 and over | 1 | 0% |
| | No Response | 1 | 0% |
| | Total | 413 | 100% |
| | Average Per Organization | 4.1 | |
| Regions of Operation | Provincial (BC) | 396 | 96% |
| | Other Provinces | 213 | 52% |
| | United States | 148 | 36% |
| Type of Carrier | For-hire carrier | 358 | 87% |
| | Private carrier | 42 | 10% |
| | Both private and for-hire | 10 | 2% |
| | Other | 3 | 1% |
| | Total | 413 | 100% |
| Region Located | Greater Vancouver | 195 | 47% |
| | Vancouver Island | 76 | 18% |
| | Southern Interior | 80 | 19% |
| | Northern BC | 54 | 13% |
| | Outside BC | 8 | 2% |
| | Total | 413 | 100% |
| Total Number of Staff in BC | Less than 10 | 116 | 28% |
| | 10 to 25 | 137 | 33% |
| | 26 to 49 | 62 | 15% |
| | 50 to 99 | 38 | 9% |
| | 100 to 200 | 35 | 9% |
| | 200 and over | 20 | 5% |
| | No response | 5 | 1% |
| | Total | 413 | 100% |
| | Average Per Organization | 45.0 | |

| Profile | Categories | Frequencies | Percent |
|--|--------------------------|-------------|---------|
| Total Number of Class 1 Drivers in BC | 1 to 5 | 117 | 28% |
| | 6 to 10 | 87 | 21% |
| | 11 to 20 | 93 | 23% |
| | 21 to 40 | 68 | 17% |
| | 41 and over | 48 | 12% |
| | Total | 413 | 100% |
| | Average Per Organization | 22.9 | |
| Class 1 Drivers As a Percent of Total Staff | 0 to 10% | 29 | 7% |
| | 11 to 25% | 37 | 9% |
| | 26 to 50% | 78 | 19% |
| | 51 to 75% | 104 | 25% |
| | 76 to 90% | 79 | 19% |
| | 91 to 100% | 36 | 9% |
| | Owner-Operator Oriented | 45 | 11% |
| | No Response | 5 | 1% |
| | Total | 413 | 100% |
| | Weighted Average | 58.9% | |

D. STRUCTURE OF THE REPORT

The report is divided into three chapters. Chapter II provides an overview of the BC trucking industry in terms of characteristics, segments and employment of the industry, human resource challenges, recruitment and retention strategies, and training practices based on the results of our literature review. Chapter III summarizes the results of our survey regarding each of the research questions. The major findings, conclusions and recommendations are presented in the Executive Summary.

II. THE TRUCKING INDUSTRY

A. BC TRUCKING HUMAN RESOURCES PLANNING COMMITTEE

The trucking industry in BC and Canada is facing a significant current and projected human resources shortage of professional truck drivers and other key occupations in the industry. A 2002 study conducted by the CTHRC projected that 37,300 new professional drivers are needed annually across Canada including at least 4,500 new drivers in BC. BC Trucking Association members have identified finding qualified professional drivers as their greatest business challenge. According to a 2006 CTHRC survey of 1,432 employers across the country, there has been an increase in the proportion of trucking industry employers who consider truck driver shortages to be one of their top two concerns. In the recent survey, 86% of for-hire employers felt that the driver shortage would worsen in the next five years as compared to 79% in 2002; the responses for private carriers were 77% and 73% in 2006 and 2002, respectively.

According to the BC Trucking Industry Strategic Plan, a reason for this significant human resources shortage lies in a combination of high demand (trucking employment tracks with GDP and as the economy grows, so does the demand for trucks) and low supply of qualified drivers and other key personnel. The latter is related to demographic trends as well deficiencies in training. Other factors serve to aggravate the shortage further. In the preliminary results from the CTHRC 2006 survey, employers identified working conditions (43.5%) and lack of interest in the industry/occupation among youth (35.9%) as the top reasons for driver shortages. The shortage is also exacerbated by skills shortages in industries with a similar workforce, such as construction.

In February 2006, BCTA applied for and was granted funding under Service Canada's Labour Market Partnerships Program to establish the BC Trucking Human Resources Planning Committee under 1-year agreement with Service Canada, BCTA, and Teamsters Canada (Local 31) to develop a 3-5 year strategic human resources plan for the industry (Phase I).

In August 2006, the Committee initiated three major research projects to obtain a thorough understanding of trucking HR challenges:

- An environmental scan of truck driver training programs, standards and systems and best practices across Canada and selected U.S. states;
- A trucking industry career communications and marketing plan; and
- A review of commercial driver licensing testing and standards in B.C. and a comparison with other jurisdictions.

Among other things, the findings of these projects indicated that the trucking industry faces several challenges that inhibit its ability to attract human resources:

- Negative image
- Undesirable working conditions
- Lack of systematic industry career map
- Lack of coordinated, comprehensive strategy to attract and recruit new drivers
- Increasing driver attrition from turnover
- Increasing competition from other industries
- Lack of appropriate provincial occupational training and licensing standards
- Training costs are significant financial barrier for employers
- Fragmented, uncoordinated provincial truck driver training delivery system
- Changing provincial and federal regulatory requirements
- Lack of good labour market and human resources information

Drawing from the recommendations of the three reports, the Committee developed a human resources strategic plan to help the industry improve its image, promote clear career paths, attract and recruit new workers, retain new and existing workers, develop and implement effective driver training model, and improve driver licensing standards. This plan will be evaluated and amended as necessary. It centres on the following 12 strategies, which address five areas of focus:

STRATEGIES DEFINED UNDER THE BC TRUCKING INDUSTRY STRATEGIC HUMAN RESOURCES PLAN

| Focus Areas | Strategies |
|-------------------------------------|--|
| Communication & Promotion | 1. Educate the industry about its human resources challenges 2. Educate potential recruits and influencers about career opportunities in the trucking industry |
| Attraction, Recruitment & Retention | 3. Target industry: promote progressive, innovative workplace practices 4. Target potential recruits: promote trucking career maps |
| Truck Driver Training & Financing | 5. Promote a minimum pre-licensing training standard 6. Develop a coherent driver training delivery system 7. Consider post-licensing certification programs 8. Identify, promote, and advocate improved driver training financing mechanisms |
| Driver Licensing | 9. Recommend improvements to the driver licensing testing standard and testing process |
| Strategic Plan Oversight & Renewal | 10. Establish mechanisms to obtain stakeholder advice and feedback on long-term HR plan 11. Establish and sustain BCTA capacity to manage and coordinate HR plan 12. Develop and implement monitoring and evaluation process for HR plan |

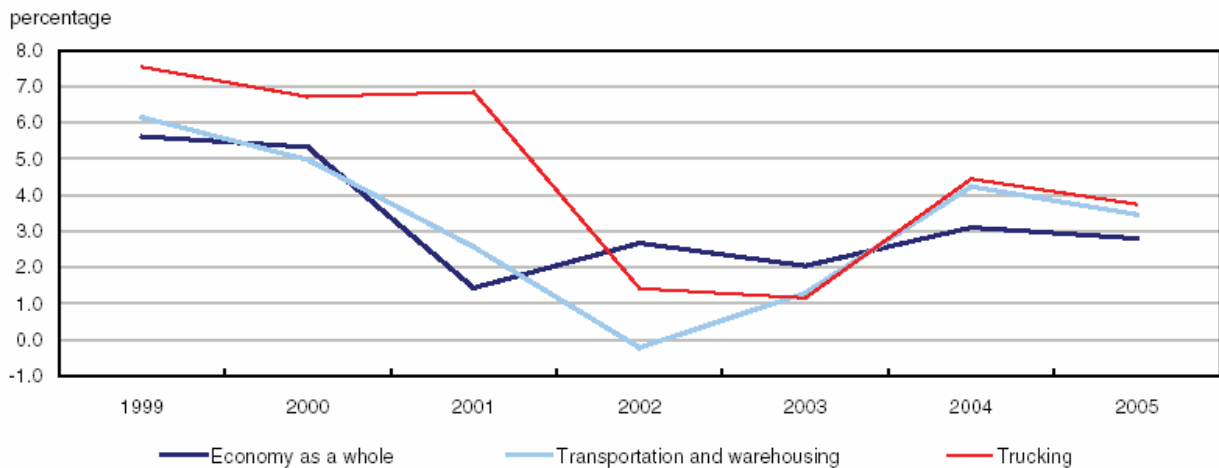
B. CHARACTERISTICS OF THE INDUSTRY

Some of the key characteristics of the trucking industry include:

- **A competitive and vibrant trucking industry, supported by a sufficiently large and highly skilled workforce, is crucial to the economy.** Trucking accounts for 1.4 percent of Canada’s GDP (\$54.7 billion in revenue and \$14.4 billion GDP)¹. Across Canada, over 60% of the value of Canadian trade with the United States is dependent on the trucking industry and trucks haul 90% of all consumer products and foodstuffs. No other mode of transportation can match the flexible, reliable, time-sensitive, door-to-door service of the trucking industry².
- **In recent years, the trucking sector has been growing faster than the overall economy.** GDP in the transportation and warehousing sector rose by 3.5% in 2005, slightly lower than the 4.2% growth experienced a year earlier. Truck transportation accounted for the largest share of transportation and warehousing GDP at 28.8%, followed by rail and transit and ground transportation with 11.5% and 10.6%, respectively. Air transportation registered the highest growth rate of 10.8% followed by Truck transportation at 3.7%.

1 Transport Canada, Transportation in Canada, 2005
2 Canadian Trucking Alliance, Lifeblood of the Economy brochure

Figure 1.1
Annual Variation in GDP, Chained 1997 dollars, 1999-2005



Source: Gross Domestic Product at basic prices, North American Industry Classification System (NAICS), chained 1997 dollars, CANSIM table 379-0017 for Canada industry detail. Statistics Canada.
Gross Domestic Product (GDP), expenditure-based, provincial economic accounts, chained 1997 dollars, CANSIM table 384-0002 for Canada. Statistics Canada.

The increased strength of the Canadian dollar may begin to affect cross-border imports and exports. As exports become more expensive, imports become more affordable.

- **Professional drivers can be found working in most sectors.** Most products that need to be moved or distributed end up on a truck at some point. According to Transport Canada, construction materials are the leading commodity moved by trucks intraprovincially, followed by agricultural products, primary materials, metal and mineral products, and energy products.
- **Employers of professional drivers can be divided into a number of segments** including for-hire carriers, private carriers, courier firms, owner-operators, and other employers.

TYPES OF COMPANIES EMPLOYING PROFESSIONAL DRIVERS

| Type of Company | Description |
|--------------------------|--|
| For-Hire Carriers | Companies that <i>haul freight for others</i> for compensation |
| Private Carriers | Companies that <i>haul their own freight</i> and occasionally haul goods for others for compensation |
| Courier Firms | Operate trucks and provide the same services as for-hire carriers |
| Owner-operators | Individuals who own and drive their own truck and haul trailers for other carriers or directly for a shipper. Most owner-operators are independent contractors. |
| Other Employers | Include companies and institutions that use trucks for purposes other than hauling freight commercially, e.g., municipal governments that use trucks for snow ploughing, garbage removal and tree trimming |

- **Across Canada, the transportation and warehousing industry employs the majority (65%) of professional drivers.** The percentage of professional drivers employed by the transport and warehousing industry increased from 50% in 1987, reflecting a shift towards for-hire motor carriers.

PROFESSIONAL DRIVERS IN INDUSTRY, 1987 AND 2004

| Year | 1987 | | 2004 | | '87-'04 |
|--|-----------------------------|-----|-----------------------------|-----|----------|
| | Professional drivers ('000) | % | Professional drivers ('000) | % | |
| Industry | | | | | % Change |
| Agriculture, Forestry, Fishing and Hunting | 2.6 | 1 | 2.5 | 1 | - |
| Mining, and Oil and Gas | 6.2 | 3 | 5.9 | 2 | -1 |
| Construction | 14.6 | 7 | 13.0 | 5 | -2 |
| Manufacturing | 33.9 | 16 | 27.0 | 10 | -6 |
| Wholesale Trade | 14.3 | 7 | 21.0 | 8 | +1 |
| Retail Trade | 15.7 | 7 | 11.3 | 4 | -3 |
| Transportation and Warehousing | 106.8 | 50 | 175.3 | 65 | +15 |
| Public Administration | 4.0 | 2 | 2.5 | 1 | -1 |
| Business, Building, and Other Support Services | 1.6 | 1 | 3.4 | 1 | - |
| Other Industries | 12.5 | 6 | 9.4 | 3 | -3 |
| Industry Total | 212.2 | 100 | 271.3 | 100 | |

Source: Labour Force Survey, Statistics Canada

- According to the 2005 survey of For-hire Motor Carriers of Freight conducted by Statistics Canada, there were 3,356 Canada-based for-hire carriers with annual revenues of \$1 million or more in 2005³.** This represents a 5% increase over the 3,197 carriers observed in 2004. By its nature, for-hire trucking is especially sensitive to the overall economic situation, since it is stimulated by demand derived from other industries. Favourable economic conditions in recent years, particularly the growth of wholesale and retail sales, have contributed to the demand for freight services. According to the Transportation in Canada 2006 Annual Report, prepared by Transport Canada, Canadian for-hire trucking firms carried over 80% of total tonnage shipped intra-provincially.
- A relatively small number of carriers account for a significant proportion of industry revenues in Canada.** For example, carriers with annual revenues of at least \$25 million account for only 3% of all carriers in Canada (with revenues of more than \$1 million) but account for 31% of total operating revenues. Truck carriers with annual revenues of \$12 million or more accounted for 55% of the trucking revenues generated by trucking firms with at least \$1 million of annual revenues. Conversely, the smallest carriers (those with annual revenues between \$1 million and \$1.9 million) accounted for one-third of the companies but only 5% of total operating revenues.
- According to the Statistics Canada 2004 Labour Force Survey, about 265,000 people in Canada earn their living as truck drivers.** It should be noted that not all of these truck drivers would have Class 1/A licenses. As indicated below, drivers are most commonly employed by for-hire carriers, male, and older and less educated on average than the general work force. According to the 2004 Labour Force survey, there are approximately 35,000 professional drivers in BC (again not all of the drivers would have Class 1 licenses).

³ In total, there were over 10,000 (approximate) for-hire motor carriers in Canada, compared with about 9,900 in 2004 (Transportation in Canada 2006 Annual Report)

DISTRIBUTION OF PROFESSIONAL DRIVERS

| | All Occupations | Trucking | | |
|-----------------------------------|-----------------|----------|----------|---------|
| | | Total | For-hire | Private |
| Total Jobs | 15,949,700 | 271,300 | 165,600 | 105,700 |
| Employment Type | % | % | % | % |
| Employees | 84.6 | 78.7 | 67.2 | 96.6 |
| Self-employed | 15.4 | 21.3 | 32.8 | 3.4 |
| Age | | | | |
| 15 to 24 | 15.4 | 5.4 | 3.8 | 7.9 |
| 25 to 34 | 21.7 | 20.1 | 21.2 | 18.4 |
| 35 to 44 | 25.9 | 28.9 | 29.3 | 28.3 |
| 45 to 54 | 23.9 | 27.0 | 27.0 | 27.1 |
| 55 and older | 13.1 | 18.5 | 18.3 | 18.9 |
| Sex | | | | |
| Men | 53.2 | 97.5 | 97.6 | 97.3 |
| Women | 46.8 | 2.5 | 2.4 | 2.7 |
| Education | | | | |
| Less than high school | 14.4 | 33.9 | 34.5 | 32.9 |
| High school | 20.3 | 27.0 | 24.5 | 30.9 |
| Some postsecondary | 10.0 | 8.9 | 9.5 | 7.9 |
| Postsecondary certificate/diploma | 34.1 | 27.2 | 28.6 | 25.1 |
| University degree | 21.2 | 3.0 | 3.0 | 3.1 |
| Province | | | | |
| Newfoundland and Labrador | 1.3 | 1.1 | 0.8 | 1.6 |
| Prince Edward Island | 0.4 | 0.4 | 0.3 | 0.7 |
| Nova Scotia | 2.8 | 2.8 | 2.5 | 3.4 |
| New Brunswick | 2.2 | 3.3 | 3.4 | 3.1 |
| Quebec | 23.1 | 22.3 | 21.7 | 23.3 |
| Ontario | 39.6 | 35.6 | 38.0 | 31.8 |
| Manitoba | 3.6 | 4.5 | 4.9 | 3.9 |
| Saskatchewan | 3.0 | 4.1 | 4.3 | 3.7 |
| Alberta | 11.0 | 12.9 | 12.1 | 14.2 |
| British Columbia | 12.9 | 13.0 | 12.0 | 14.7 |

Source: Labour Force Survey 2004, Statistics Canada

- As of 2004, most professional drivers employed by for-hire carriers across Canada were company drivers rather than owner-operators or agency drivers. According to Statistics Canada, most were long-distance professional drivers who dealt with truckload shipments.

DISTRIBUTION OF PROFESSIONAL DRIVERS IN FOR-HIRE TRUCKING*

| | Total | Company Drivers | Owner Operators | Agency Drivers |
|-----------------------------|---------|-----------------|-----------------|----------------|
| Total | 126,100 | 82,600 | 36,900 | 6,600 |
| Overall Distribution | 100% | 66% | 29% | 5% |
| Activity | | | | |
| General Freight | 62% | 61% | 77% | 61% |
| Household Goods | 3 | 3 | 1 | 2 |
| Liquid Bulk | 9 | 9 | 5 | 8 |
| Dry Bulk | 7 | 7 | 5 | 7 |
| Forest Products | 4 | 4 | 1 | 4 |
| Other Specialized Freight | 16 | 15 | 12 | 17 |

| | Total | Company Drivers | Owner Operators | Agency Drivers |
|---------------------|---------|-----------------|-----------------|----------------|
| Distance | 122,500 | 79,800 | 36,200 | 6,500 |
| Local | 24% | 26% | 20% | 17% |
| Long distance | 76% | 74% | 80% | 83% |
| Load | | | | |
| | 63,000 | 40,300 | 18,500 | 4,200 |
| Truckload | 71% | 71% | 69% | 72% |
| Less than Truckload | 29% | 29% | 31% | 28% |

* Carriers with annual operating revenues of a million dollars or more.

- Across Canada, the average employee truck driver earns \$40,500 per year and the average new truck driver starting wage is higher than for most entry level positions in other sectors⁴.** In many cases, truck drivers are paid by the mile or on a percentage basis rather than the hour. Professional drivers are less likely to work part-time (8%) than other occupations. Trucking industry sources expect increases in part-time and contract work as well as self-employment among truck drivers. This is supported by the increased demand for drivers who use their own vehicles for work⁵.
- Most trucking businesses in British Columbia (86%) are small operators.** Small operators are defined as an individual or organization that would not qualify for a fleet policy with the Insurance Corporation of BC (i.e., one with fewer than 5 vehicles in the business); 15,051 (86%) of the reported provincial total of 17,443 organizations or individuals who have a National Safety Code and one or more trucks fit in this category.
- According to Statistics Canada data, there are 4,224 truck transportation companies in BC with employees of which only 1,185 companies have 5 or more employees.** The table on the following page summarizes the number of companies by sector and number of employees.
- Professional drivers are distributed throughout British Columbia.** According to BC Work Futures, in comparison to other workers, professional drivers are less likely than the average worker to live in the Lower Mainland (only 54% are found in the Lower Mainland region as compared to 58% of the workforce in general) and on Vancouver Island (15% compared to an all-occupation average of 18%). Seventeen percent of professional drivers reside in the Southern Interior and 13% reside in Northern BC.

4 Statistics Canada, *January 2006 Perspectives*, Catalogue no. 75-001-XIE, page 16

5 BC Work Futures

NUMBER OF TRUCK TRANSPORTATION COMPANIES IN BRITISH COLUMBIA

| 484 - Truck Transportation | Number of Companies by Range in Employees | | | | | | | | |
|--|---|-------------|------------|------------|------------|-----------|------------|------------|----------|
| | Total | 1 to 4 | 5 to 9 | 10 to 19 | 20 to 49 | 50 to 99 | 100 to 199 | 200 to 499 | 500 + |
| Number of companies | 4224 | 3039 | 503 | 368 | 230 | 57 | 19 | 7 | 1 |
| <i>4841 - General Freight Trucking</i> | <i>2153</i> | <i>1629</i> | <i>244</i> | <i>154</i> | <i>87</i> | <i>28</i> | <i>6</i> | <i>5</i> | <i>0</i> |
| 484110 - General Freight Trucking, Local | 1225 | 953 | 133 | 87 | 33 | 16 | 3 | 0 | 0 |
| 484121 - General Freight Trucking, Long Distance, Truck-Load | 859 | 638 | 100 | 65 | 45 | 7 | 2 | 2 | 0 |
| 484122 - General Freight Trucking, Long Distance, Less Than Truck-Load | 69 | 38 | 11 | 2 | 9 | 5 | 1 | 3 | 0 |
| <i>4842 - Specialized Freight Trucking</i> | <i>2071</i> | <i>1410</i> | <i>259</i> | <i>214</i> | <i>143</i> | <i>29</i> | <i>13</i> | <i>2</i> | <i>1</i> |
| 484210 - Used Household and Office Goods Moving | 227 | 143 | 34 | 28 | 19 | 2 | 1 | 0 | 0 |
| 484221 - Bulk Liquids Trucking, Local | 99 | 55 | 12 | 17 | 9 | 4 | 2 | 0 | 0 |
| 484222 - Dry Bulk Materials Trucking, Local | 506 | 404 | 55 | 28 | 13 | 5 | 1 | 0 | 0 |
| 484223 - Forest Products Trucking, Local | 493 | 346 | 57 | 55 | 29 | 4 | 1 | 1 | 0 |
| 484229 - Other Specialized Freight (except Used Goods) Trucking, Local | 242 | 168 | 31 | 24 | 17 | 2 | 0 | 0 | 0 |
| 484231 - Bulk Liquids Trucking, Long Distance | 66 | 28 | 13 | 8 | 10 | 5 | 2 | 0 | 0 |
| 484232 - Dry Bulk Materials Trucking, Long Distance | 55 | 36 | 6 | 7 | 4 | 1 | 1 | 0 | 0 |
| 484233 - Forest Products Trucking, Long Distance | 176 | 112 | 25 | 21 | 16 | 2 | 0 | 0 | 0 |
| 484239 - Other Specialized Freight (except Used Goods) Trucking, Long Distance | 207 | 118 | 26 | 26 | 26 | 4 | 5 | 1 | 1 |

Source: Statistics Canada – Establishment Count Data, 2006-07

C. OTHER OCCUPATIONS IN THE INDUSTRY

Most of the industry research that has been conducted to date has focused on drivers. However, the strategic plan prepared by the BC Trucking Human Resources Planning Committee also identified a number of other occupations in the industry including dispatch & operation, safety & loss prevention, fleet maintenance, administration, information technology, and dock and warehouse activities. A description of these occupations, as well as professional drivers, is provided below.

OCCUPATIONS IN THE TRUCKING INDUSTRY

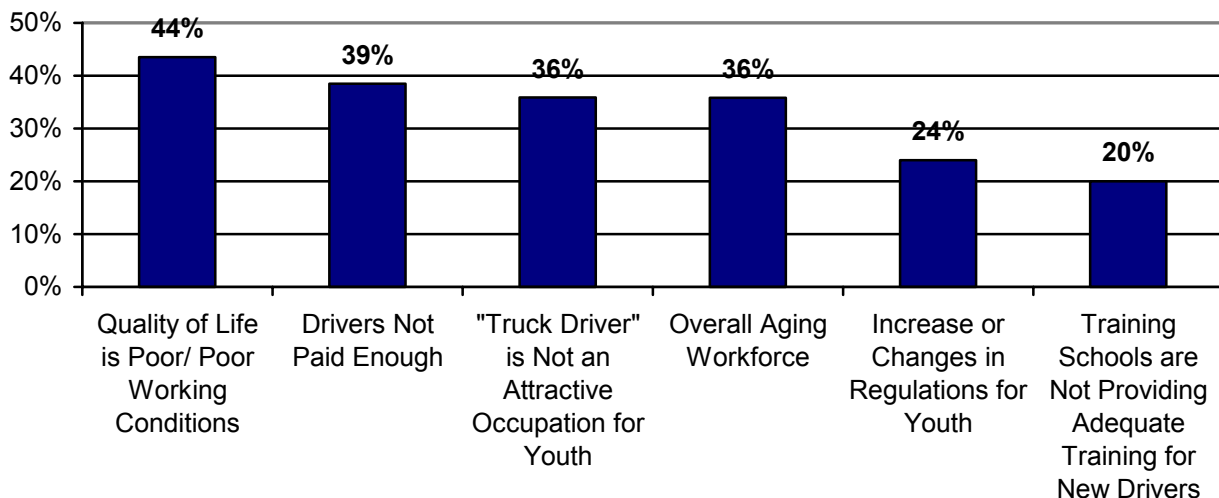
| General Responsibilities | Typical Jobs |
|---|--|
| Professional Drivers | |
| <ul style="list-style-type: none"> • Pick-up and deliver freight safely, on time and damage free • Perform daily inspections of the truck and equipment • Maintain paperwork, such as log-book entries, trip inspection reports and documents required for border crossings • Specialization in different types of equipment and loads is also possible | <ul style="list-style-type: none"> • Local Pick-Up and Delivery Driver • Short Haul Driver • Long-Haul Driver • Owner-Operator |
| Dispatch & Operation | |
| <ul style="list-style-type: none"> • Plan routes effectively • Ensure the right equipment is used and both driver and equipment meet customers' needs and all legal requirements • Act as the first point of contact for new and existing customers, which may include managing customer complaints • Supervise drivers and manage vehicles and equipment • Handle billing, licensing and permitting | <ul style="list-style-type: none"> • Customer Service Representative • Dispatcher • Fleet Supervisor • Billing Administrator • Operations Manager |
| Safety & Loss Prevention | |
| <ul style="list-style-type: none"> • Train personnel in safe operating and driving procedures • May administer drug and alcohol testing programs • Design and implement policies to reduce personal injury, and cargo and equipment losses | <ul style="list-style-type: none"> • Driver Trainer • Loss Prevention Administrator • Safety and Compliance Administrator • Safety & Loss Prevention Manager |
| Fleet Maintenance | |
| <ul style="list-style-type: none"> • Develop and implement preventative maintenance programs • Perform inspections on trucks, trailers and other equipment • Repair and maintain all trucks, trailers, and other equipment | <ul style="list-style-type: none"> • Truck and Transport Mechanic • Commercial Trailer Mechanic • Wheel Installer/Tire Technician • Welder • Shop Floor Supervisor • Parts Supervisor • Maintenance Manager |
| Administration | |
| <ul style="list-style-type: none"> • Support Dispatch & Operations • Manage and administer all the company's efforts related to finances, personnel, marketing and sales, and licensing of vehicles and equipment | <ul style="list-style-type: none"> • Accountant • Licensing/ Permitting • Sales/ Marketing Representative • Personnel/ Human Resources Manager |

| General Responsibilities | Typical Jobs |
|--|---|
| Information Technology | |
| <ul style="list-style-type: none"> • Install, configure, and troubleshoot PCs • Plan, set up and manage the company's network and databases • Administer and potentially design the company's website • Set up and manage transfer of data to government agencies, e.g., Customs | <ul style="list-style-type: none"> • Network Administrator • Database Administrator • System Analyst • IT Manager |
| Dock & Warehouse Operations | |
| <ul style="list-style-type: none"> • Effectively move goods around in warehouses and to and from trucks using, for instance, forklifts and other loading equipment • Safely and efficiently unload and load trucks, trailers and other equipment • Handle dangerous goods if necessary | <ul style="list-style-type: none"> • Dock Worker • Forklift/ Tow Motor Operator • Dock Supervisor • Warehouse Manager |

D. HUMAN RESOURCE CHALLENGES

The CTHRC's Phase II Research has demonstrated that major shortage exists with respect to truck drivers as a result of high demand (trucking employment tracks with GDP and, as the economy grows, so does the demand for trucks) and low supply of qualified drivers and other key personnel. In the 2006 survey, employers identified working conditions (43.5%), poor compensation (38.5%) and lack of interest in the industry/occupation among youth (35.9%) as the top reasons for driver shortages.

TOP REASONS FOR DRIVER SHORTAGE



Other observations and findings of the CTHRC's Phase II Research included:

- The Canadian trucking sector faces considerable human resource challenges. In particular, there is a shortage of qualified Class 1/A drivers and it is expected to worsen over the next five years.
- There is a considerable "loss" in drivers between receiving their Class 1/A licence and employment in the industry.
- There is limited opportunity to "convert" inactive licence holders to become active drivers.
- The shortage of qualified drivers is not a "supply-side" issue, but rather a training/qualification issue.
- Training needs of new entrants do not align with existing training provided by employers.

- There is no “magic bullet” to solve attraction/retention issues in the industry.
- The profile of “new entrants” to the trucking sector suggests that considerable work needs to be done to develop an effective promotion/attraction strategy.
- The trucking sector is not a homogenous sector; therefore, a “one size fits all” strategy may not be sufficient to address the diverse human resource requirements of the industry.

Some of the general human resource challenges and issues that were identified in BC Trucking Industry Strategic Human Resources Plan included:

- **Demographic changes in our population and workforce**, particularly less new, younger entrants and increasing retirements among an aging workforce. Also, a greater diversity with steady immigration, particularly from Asian countries.
- **Increasing skills and labour shortages in most BC industries**, many of which compete directly with trucking employers in the “war for talent.”
- **Increasing focus on the youth.** As a result of increasing competition, more and more industries are reaching out to young people and other potential workers to promote the image and careers of their industries.
- The **significant economic growth in Western Canada**, fueled by commodity prices, housing growth, investments in non-residential construction, and infrastructure projects. Increasing globalization and integration of international economies with economic, social, political and environmental trends is affecting market patterns in the demand for goods and services.
- **Increasing rate of technological change** in all parts of the BC economy, particularly information technology.
- **Continuing challenges in increasing productivity growth** in goods and services sectors, and the resulting pressure to replace labour with equipment and technology and making better use of human capital.
- Skills wastage represented in the **under-utilization of non-traditional labour pools** (e.g., Aboriginal, women, persons with disabilities, etc.) and skilled immigrants with training and credentials from other countries.
- **The need for an educated work force.** Three-quarters of future jobs will require some degree of formal post-secondary education or industry training with credentials. Formal learning will play an increasing role in competitiveness and well-being of jurisdictions, industries, companies and workers.

Some of the driver and industry specific issues that were in the BC Trucking Industry Strategic Human Resources Plan included:

- **Regulatory issues.** The driver shortage will likely be exacerbated by new *Canadian Hours of Service Regulations*, which came into effect on January 1, 2007 nationally and in March 2007 for intra-provincially regulated trucking companies. The new *Hours of Service Regulations* are more stringent than those currently in effect and will likely lead to reduced productivity by reducing the available hours of work. Similarly, cross-border security regulations, introduced by both U.S. and Canadian governments in the wake of September 11, 2001, have made crossing the border more onerous on truck drivers and their companies.

- **Traffic congestion.** Congestion, which is at an all-time high in the BC Lower Mainland, is aggravating the driver shortage. The annual economic cost of congestion in the region is currently estimated at \$1.5 billion.
- **Insufficient numbers of successful commercial driver license applicants.** For example, ICBC data indicates that about 4,000 individuals obtained a Class 1 license in 2006 (up from about 3,800 in 2005), which is less than the projected number of new drivers needed annually. Furthermore, not all new Class 1 license holders enter the industry.
- **An aging workforce,** which tends to be older than the national average. Low numbers of young people entering the trucking industry have been attributed to a number of factors including the limited appeal of the occupation for youth, age restrictions on professional drivers entering the US (even those licensed outside the US, must be at least 21), and the tendency of insurance companies to require a minimum number of years of experience before either offering insurance or making insurance available at competitive rates.

E. RECRUITMENT AND RETENTION STRATEGIES

Some of the findings of past research regarding recruitment and retention strategies for drivers are as follows:

- **Trucking companies employ various recruiting strategies ranging from word-of-mouth to extensive print and online advertising to job fairs.** According to a BCTA membership survey, the effectiveness of advertising tends to be limited, principally drawing drivers who drift from company to company due to incompetence, poor interpersonal skills and high insurance claims. Good drivers generally already have good jobs. Members noted that qualified drivers become aware of who the good companies are and, if they wish to make a move, will apply for work with these companies regardless of whether the companies are advertising vacancies.
- **Companies have implemented a number of changes to improve their attractiveness to prospective employees.** Of the companies that responded to the BCTA membership survey, all indicated they had increased compensation (company drivers earn on average between \$53,682 and \$56,682 annually), offered full benefits, paid vacations and worked on continuously improving employment conditions. Some even offered signing bonuses.

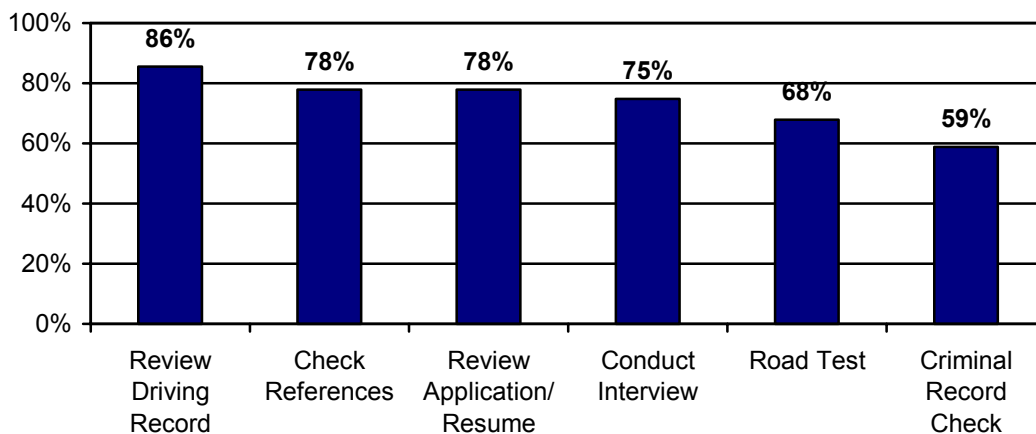
The 2006 CTHRC survey revealed that 79% of the companies provided at least one benefit program for attracting and retaining Class 1/A truck drivers. The majority (70%) of companies offered more than one benefit program, including 31% providing more than four.

BENEFITS OFFERED BY COMPANY TYPE

| Benefits Offered | Company Type | | Overall (%) |
|--|--------------|-------------|-------------|
| | For-hire (%) | Private (%) | |
| No benefits provided | 19.2 | 22.4 | 20.6 |
| Life, accident or injury insurance | 53.3 | 49.7 | 51.7 |
| Medical/dental benefits | 53.6 | 49.5 | 51.7 |
| Paid time for training | 42.0 | 43.4 | 42.7 |
| Guaranteed days off | 37.9 | 39.5 | 38.6 |
| Performance incentive programs | 34.4 | 27.1 | 31.1 |
| Employee assistance program (help solve personal or work-related problems) | 27.5 | 26.6 | 27.1 |
| Meal allowances on the road | 19.0 | 30.2 | 24.0 |
| Pension plan | 19.7 | 26.9 | 23.0 |
| Choice of routes | 22.6 | 15.9 | 19.6 |
| Other | 4.4 | 4.1 | 4.3 |

- **Despite these efforts, BCTA members noted a large decrease in qualified applicants over the past three to five years**, with companies facing the greatest difficulty in recruiting for long hauls. The vast majority of companies (83%) stated that those candidates that did apply had much lower skills than the average candidate three to five years ago.
- **Companies employ a number of practices to screen prospective employees.** According to the 2006 employer survey conducted by CTHRC, more than one half (56%) of companies implemented more than five different tests and/or procedures associated with the hiring process while only 5% hired drivers without a screening process of some kind. The most commonly used screening procedures are summarized in the chart below.

COMMON SCREENING ACTIVITIES BY COMPANY



Examples of other screening activities include admissibility to drive to US, attitude testing, reading, writing and basic math skills, aptitude testing or use of agency drivers (pre-screened). Larger companies with 50 or more trucks and companies employing long haul drivers are more likely to implement screening procedures.

- **Companies have generally not responded to the skills shortages by easing their hiring criteria.** While the majority (63%) of companies reported no change in their hiring criteria, 30% said that their criteria had become more stringent and the rest 6% said they became less stringent.
- **Overall, companies are reasonably satisfied with the drivers they have hired.** Of the employers responding to the 2006 CTHRC survey, 31% indicated that they are very satisfied, 48% are somewhat satisfied, 10% are neither satisfied nor dissatisfied, 8% are somewhat dissatisfied and 3% are very dissatisfied with the skills levels of Class 1 drivers.
- **Well-maintained equipment was the strategy for attracting/retaining drivers;** it was most commonly identified as being very effective by the employers responding to the 2006 CTHRC survey. Other strategies which were rated by the employers in the survey included having paperwork for drivers well-organized in advance (identified as very effective by 53% of employers), paid wait times (49%), clean cabs (45%), training opportunities (21%) and a signing bonus (17%).

F. TRAINING PRACTICES

Some of the findings of past research regarding training practices for drivers are as follows:

- **Existing training programs for drivers focus primarily on basic driving skills.** According to the CTHRC survey, 85% of carriers agree that, while there may be many licensed drivers, a large number of these are not sufficiently qualified. There is no mandatory training standard for truck drivers; to receive their commercial license, drivers must only pass ICBC's written and road tests. These tests focus solely on basic driving skills commercial drivers must possess. To be employable, however, drivers must have significant additional skills and knowledge, including, but not limited to the following:
 - ❑ Border crossing and customs skills;
 - ❑ Route planning skills;
 - ❑ Proper preparation of bills of lading;
 - ❑ Proper preparation of hours of service log books;
 - ❑ Safe load securement and cargo protection procedures;
 - ❑ Hazardous materials handling and awareness;
 - ❑ Fuel management skills;
 - ❑ Time management skills;
 - ❑ Highway and mountain driving experience;
 - ❑ Customer service skills;
 - ❑ Communication skills;
 - ❑ General security skills; and,
 - ❑ General knowledge of rules and regulations.
- **CTHRC has developed occupational standards for drivers, which define the skills the industry requires of new entrants.** A training program (*Earning Your Wheels* (EYW)) administered by CTHRC accredited driving schools meets the requirements, as do programs of some other schools.
- **Employers provide a range of training to their drivers.** The results of CTHRC's 2006 survey indicated that most (83%) trucking companies offered at least one kind of training support to their employees, with 37% offering two or three and 33% offering more than three kinds of training support. The most commonly offered types of training include general orientation to company (65%), safety training (56%), pairing new drivers with a driver training (40%), and mentoring for new

drivers (33%). The study also found that larger companies with a fleet size over 100 are much more likely to provide training support. Moreover, when asked about any changes to the amount/type of training offered during the past two years, 64% of the companies said that there had been no change in their training practices over the past two years while 35% of the companies mentioned more training support was provided now than before.

III. SUMMARY OF RESEARCH FINDINGS

This chapter summarizes the research findings in terms of employment of Class 1 drivers and other trucking occupations, magnitude of the current and projected shortages, factors contributing to the shortages, strategies used to address shortages, training practices and needs, and recruitment strategies.

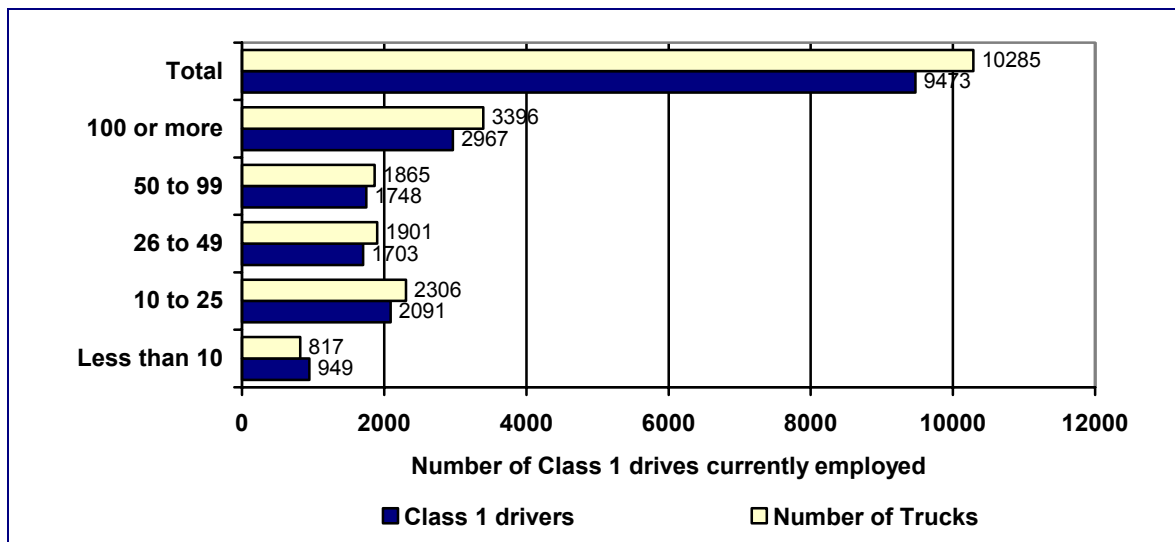
A. EMPLOYMENT OF CLASS 1 DRIVERS

The major findings of the survey regarding Class 1 drivers are summarized as follows:

- **The 413 companies whom we interviewed report that they operate 10,285 trucks and currently employ or contract with 9,473 Class 1 drivers.**

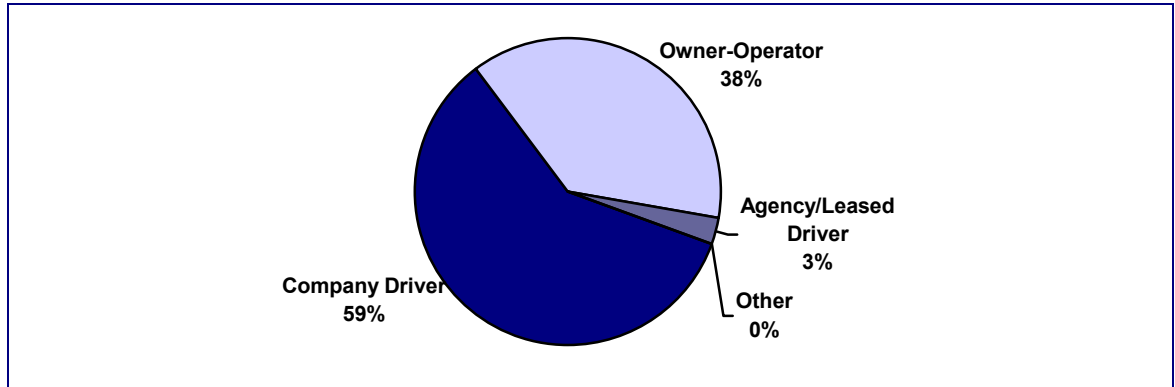
Of the 413 companies interviewed, 75% have a fleet size of 25 or fewer trucks. However, because of their small size, these companies accounted for only about 30% of the reported number of trucks and about 32% of the reported number of Class 1 drivers. On the other hand, while only 4% of the companies reported operating 100 or more trucks, these companies accounted for 33% of the trucks and 31% of the Class 1 drivers.

NUMBER OF CLASS 1 DRIVERS CURRENTLY EMPLOYED AND NUMBER OF TRUCKS OWNED BY FLEET SIZE



- **Most Class 1 drivers in BC are either company drivers (59%) or owner-operators (38%).**
Only about 3% of the Class 1 drivers are agency/leased drivers.

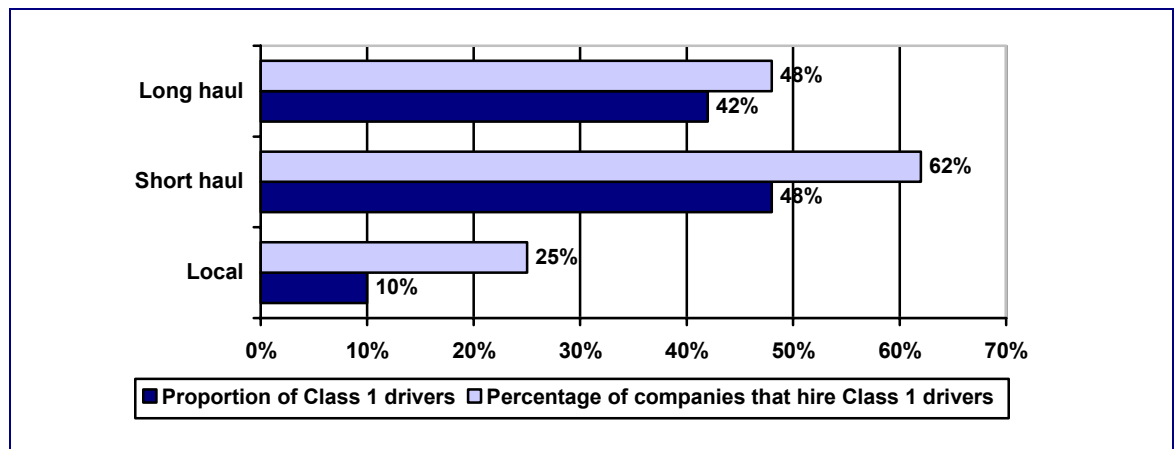
NUMBER OF CLASS 1 DRIVERS CURRENTLY EMPLOYED BY EMPLOYMENT TYPE



- **Almost one-half (48%) of Class 1 drivers are primarily short haul drivers while 42% are primarily long haul drivers who stay overnight.**

Only about 10% of the Class 1 drivers focus primarily on local routes, suggesting that other classes of drivers (such as Class 3 drivers who commonly operate smaller trailers and trucks that are suitable for local deliveries) account for the majority of the local traffic. Of the companies surveyed, 62% reported employing Class 1 drivers who provide short haul services between cities in the same day, 48% reported employing Class 1 drivers who provide long haul services (that require staying overnight), and 25% reported employing Class 1 drivers who operate locally in the same city or metro area.

PRIMARY TYPE OF DELIVERY BY PROPORTION OF CLASS 1 DRIVERS AND BY PERCENTAGE OF COMPANIES THAT HIRE CLASS 1 DRIVERS



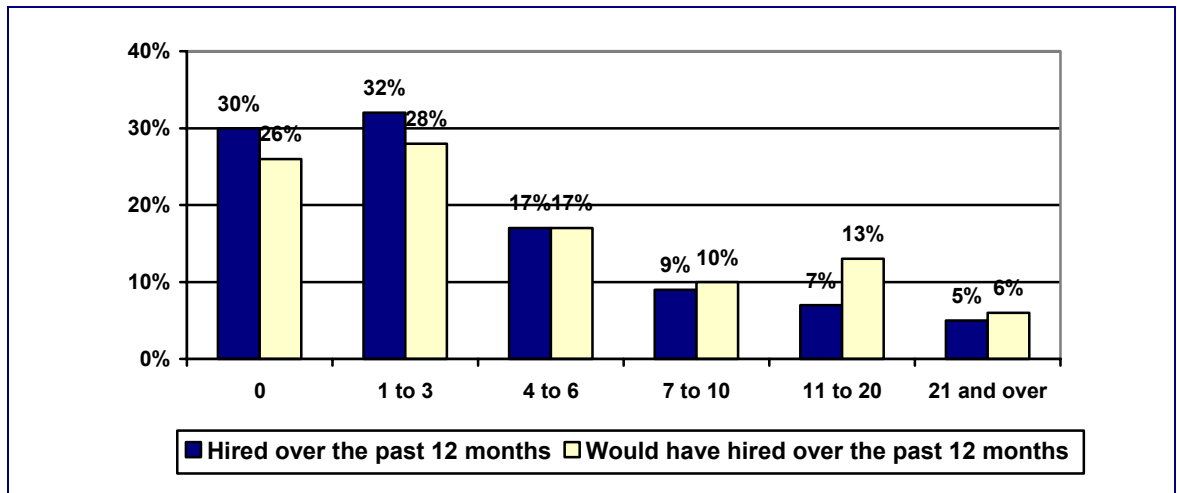
- **Most of the companies (70%) hired at least one Class 1 driver over the past 12 months.**

Of the 413 companies interviewed, almost one-half (49%) hired (directly or under contract) from one to six Class 1 drivers over the past 12 months. In total, the companies reported that they hired 2,485 Class 1 drivers which represents an average of 6.0 per company.

- **Of the 413 companies, 155 (38%) indicated that they would have hired even more drivers over the past 12 months if they had been available.**

In total, the companies reported that they would have hired 3,631 Class 1 drivers if they had been available (an average of 8.8 per company), which represents an increase of 46% over the number reported to have been hired. When asked the total number of Class 1 drivers they would have hired or contracted with over the past 12 months, 28% responded they would have hired or contracted with one to three Class 1 drivers, 17% said four to six drivers, and about 30% would have hired 7 or more Class 1 drivers had they been available over the past 12 months.

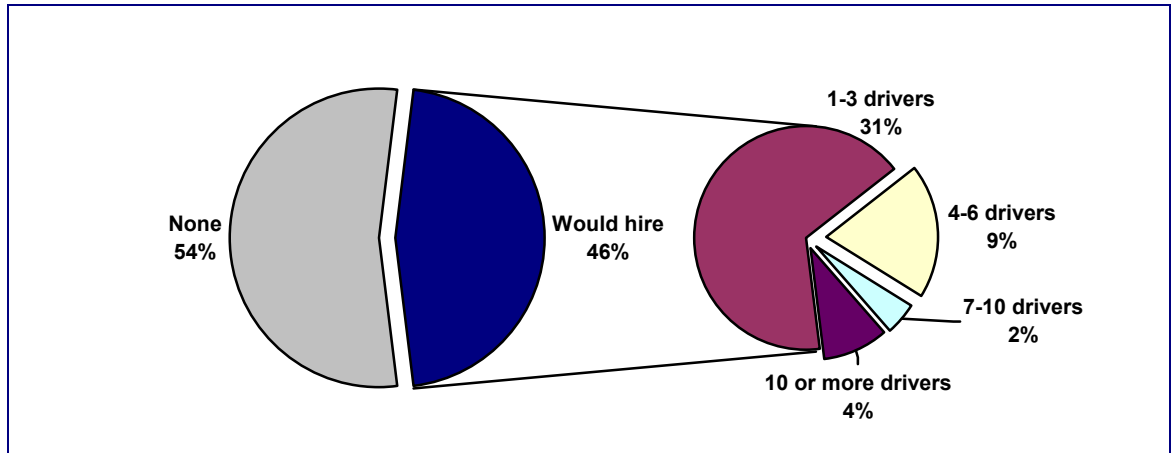
COMPARISON OF NUMBER OF DRIVERS HIRED TO NUMBER THAT WOULD HAVE BEEN HIRED HAD THEY BEEN AVAILABLE



- **Forty-six percent of the companies would hire or contract with additional Class 1 drivers on a full-time basis right now if they were available.**

While more than half of the companies interviewed responded that there is no immediate hiring need at the moment, 46% of the companies would consider hiring extra drivers on a full-time basis if they were available now, mostly considering hiring one to three more drivers. On the whole, there are 1,033 driver positions immediately available among the 413 companies interviewed.

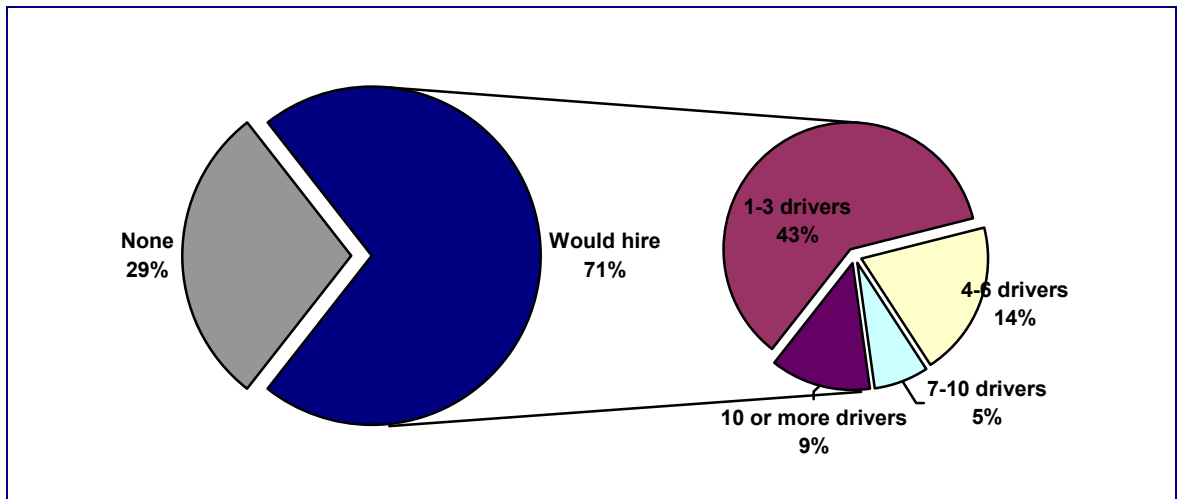
NUMBER OF CLASS 1 DRIVERS WOULD HIRE/CONTRACT WITH ON A FULL-TIME BASIS IF AVAILABLE NOW



- Most of the companies (71%) expect to hire or contract with new Class 1 drivers on a full-time basis over the next 12 months.

The 413 companies expect to fill 2,021 driver positions with new hires over the next 12 months. Most of the firms expect to hire one to three more Class 1 drivers to fill new positions or replace drivers who may leave.

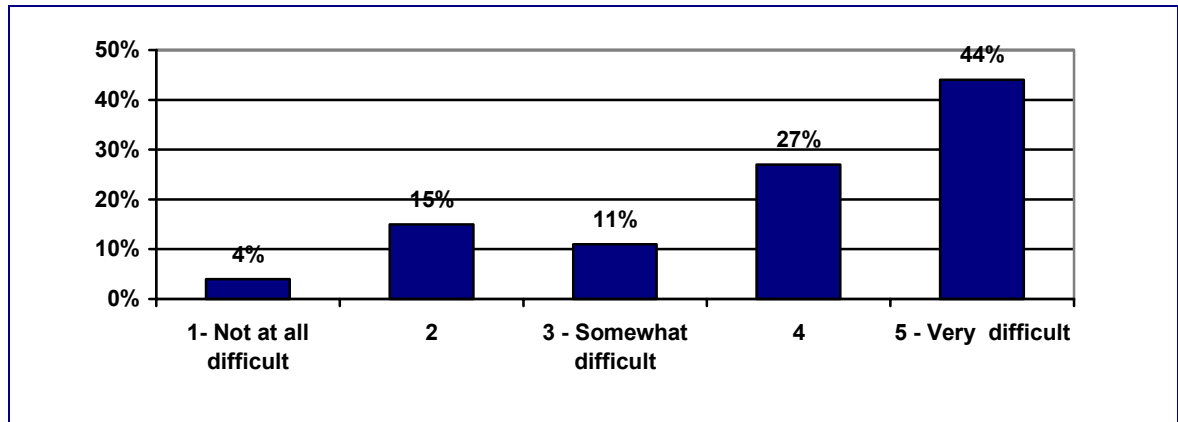
NUMBER OF CLASS 1 DRIVERS EXPECTED TO HIRE/CONTRACT WITH ON A FULL-TIME BASIS OVER THE NEXT YEAR



- Most employers rate the existing job market as difficult.

When asked to rate how difficult it will be to meet their hiring needs for Class 1 drivers over the next year, over two-third of respondents believed it will be difficult or very difficult. One-fifth of the employers expect that it will be a little or not at all difficult. On a scale of 1 to 5, where 1 is not at all difficult and 5 is very difficult, the average rating given by the employers was 3.9.

EXPECTED LEVEL OF DIFFICULTIES IN RECRUITING CLASS 1 DRIVERS OVER THE NEXT 12 MONTHS



The employers identified a range of major barriers or constraints to meeting hiring needs for Class 1 drivers over next year including:

- ❑ Many of the potential applicants are under-qualified, lacking the necessary skills, training, or practical experience needed by the employers (identified by 32% of those who plan to hire new drivers next year).
- ❑ The working conditions and nature of the job make it difficult to attract drivers (identified by 15% of employers who plan to hire next year). Some of the concerns include long, irregular hours, the need for overnight travel, concerns about border crossings, being away from home, the unsteady or seasonal nature of the job, and the physical requirements (e.g. upload and unload, tying down loads, etc.).
- ❑ There is a limited supply of drivers who have the specialized industrial knowledge and skills (identified by 13% of employers who plan to hire next year). For example, the logging industry requires Class 1 drivers who are also able to tie down the loads, change gears, apply air brakes, and drive in the mountains. Some of the positions require some customer service skills. The automobile or furniture industries require loading and material handling skills.
- ❑ There is strong competition from other sectors (identified by 9% employers who plan to hire next year). For example, there are many employment opportunities in other industries and regions such as the oil fields in Alberta or the booming construction industry in BC.
- ❑ Expectations regarding compensation are high and increasing (identified by 8% respondents who plan to hire over the next year). In particular, employers identified compensation rates for positions involving long hauls, border crossings, and port trucking.

Other less recognized barriers included a negative image or perceptions of truck driving as a career, the complexity of regulations, the limited appeal of the position to youth, and the general labour supply issue (generation low rates of unemployment).

B. EMPLOYMENT IN OTHER TRUCKING OCCUPATIONS

Through our interviews with employers, we also obtained input on three other major occupational areas including dispatch & operation, fleet maintenance, and dock & warehouse operations. More specifically, we gathered information regarding the number of people currently employed, the number recently hired, the number of immediately available positions, and the perceived level of difficulties in recruiting for each of the occupational areas.

Brief descriptions of the three occupational areas in the trucking industry are provided below.

DESCRIPTIONS OF OTHER TRUCKING OCCUPATIONAL AREAS

| Occupational Area | Example of Positions | Descriptions of Responsibility |
|---|---|--|
| <p>Dispatch & Operation</p> | <p>Customer Service, Dispatcher, Fleet Supervisor, Billing Administrator, Safety & Loss Prevention Personnel, Operations Manager</p> | <ul style="list-style-type: none"> • Plan routes effectively • Ensure the right equipment is used and both driver and equipment meet customers’ needs and all legal requirements • Act as the first point of contact for new and existing customers, which may include managing customer complaints • Supervise drivers and manage vehicles and equipment • Handle billing, licensing and permitting • May administer drug and alcohol testing programs • Design and implement policies to reduce personal injury, and cargo and equipment losses |
| <p>Fleet Maintenance</p> | <p>Mechanic, Wheel/Tire Technician, Welder, Shop Floor Supervisor, Parts Supervisor, Maintenance Manager</p> | <ul style="list-style-type: none"> • Develop and implement preventative maintenance programs • Perform inspections on trucks, trailers and other equipment • Repair and maintain all trucks, trailers, and other equipment |
| <p>Dock & Warehouse Operations</p> | <p>Dock Worker, Forklift Operator, Dock Supervisor, Warehouse Manager</p> | <ul style="list-style-type: none"> • Effectively move goods around in warehouses and to and from trucks using, for instance, forklifts and other loading equipment • Safely and efficiently unload and load trucks, trailers and other equipment • Handle dangerous goods if necessary |

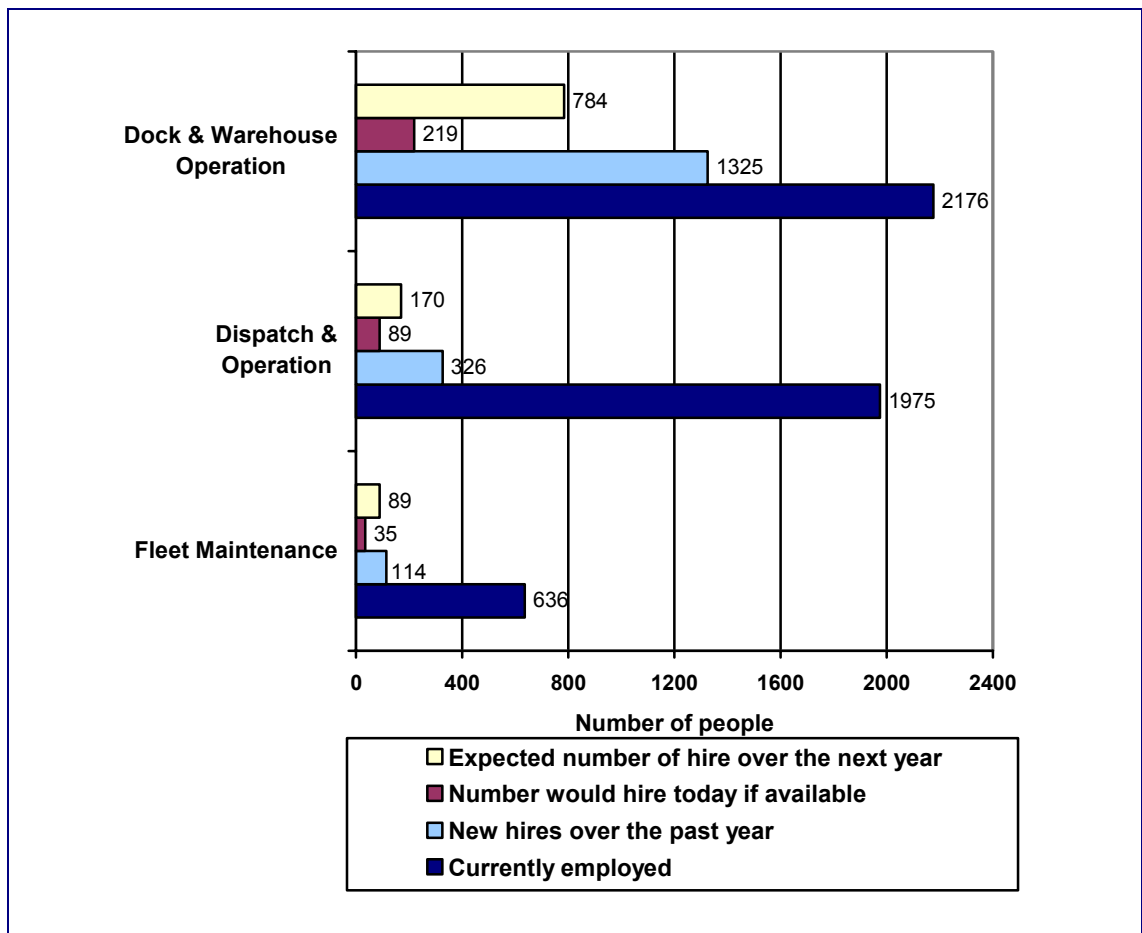
The major findings of our interviews regarding these occupations are as follows:

- **Of the 413 companies surveyed, 93% employ people in dispatch & operation, 44% employ people in fleet maintenance, and 29% employ people in dock & warehouse operations.**

Of the 413 companies surveyed:

- 121 companies reported employing 2,176 dock and warehouse workers, equal to an average of 18.0 per company. A small number of companies accounted for most of the dock and warehouse workers. Of the three occupational areas, dock & warehouse operations accounts for the highest numbers of existing positions, new hires, existing vacancies, and expected openings over the next year. The companies reported a large number of expected hirings of dock and warehouse workers over the next year, in large part because of the seasonal nature of some of the larger operations which contributes to a high level of turnover (particularly in labourer positions) from year to year. The companies reported that they would hire an additional 219 workers if they were available today.

EMPLOYMENT AND HIRING PLANS BY OCCUPATIONAL AREA

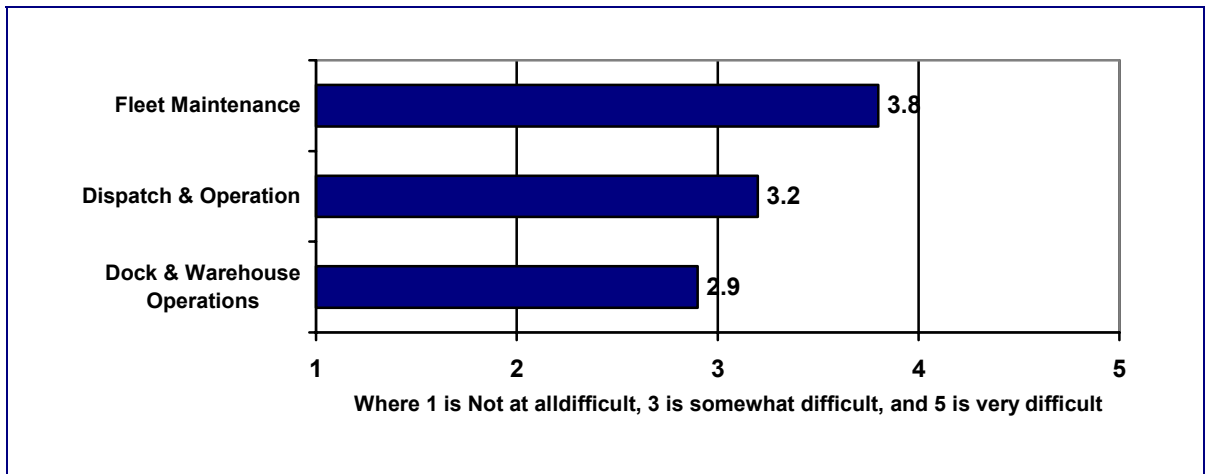


- 383 companies reported employing 1,975 dispatch & operation workers, equal to an average of 5.1 per company. The companies reported that they would hire an additional 89 workers if they were available today.
- 183 companies reported employing 636 fleet maintenance workers, equal to an average of 3.4 per company. The companies reported that they would hire an additional 35 workers if they were available today.

- **Positions related to fleet maintenance are considered the most difficult to fill.**

When asked to rate how difficult it will be to meet their hiring needs in these occupational areas on a scale of 1 to 5, where 1 is not at all difficult and 5 is very difficult, the employers who expect to hire staff over the next year provided an average rating of 3.8 in the fleet maintenance area, 3.2 for positions in dispatch and operation, and 2.9 for positions in dock and warehouse operations. The average rating for fleet maintenance compares closely with that for Class 1 drivers while filling positions in the other occupational areas is rated considerably less difficult. Fleet maintenance was identified as difficult because of the need for specialized skills.

AVERAGE RATING OF EXPECTED LEVEL OF DIFFICULTIES IN RECRUITING FOR OTHER TRUCKING OCCUPATIONS



Specific areas where difficulties were identified included:

- ❑ In the area of fleet maintenance, heavy-duty mechanics and general mechanics were most frequently identified as the toughest positions to fill. Companies have a hard time recruiting mechanics with both experience and the needed credentials for the job.
 - ❑ In the area of dock and warehouse operations, some of the toughest positions to fill include forklift operator, dock worker, and warehouse personnel/supervisor. These positions require some experience and often involve irregular working hours/shifts and a lot of physical work. It is interesting to note that even though the dock and warehouse area involves a large number of expected hirings, most employers did not expect it to be particularly difficult to fill those positions.
 - ❑ In the area of dispatch and operations, dispatchers and customer service representatives were identified as the toughest positions to fill because many of the applicants did not have experience or the knowledge to perform the general and specialized tasks required by trucking companies.
- **The companies identified a range of factors that makes it difficult to attract workers into these other occupations.**

The factors that were identified most often included:

- ❑ A lack of experienced applicants or those with the necessary training (identified by 34% of the companies);
 - ❑ The working conditions or nature of the job are not appealing (26%);
 - ❑ Strong competition for staff from other sectors, occupations, and employers (22%);
 - ❑ Opportunities to earn higher salaries elsewhere (13%);
 - ❑ The image of the transportation or warehousing sector (12%);
 - ❑ The aging workforce (6%);
 - ❑ Regulatory issues (4%); and
 - ❑ High staff turnover rates/limited commitment to the employer and the job (1%).
- **Apart from positions in these three occupational areas, other positions that were identified as tough to fill include bookkeeping/accounting personnel, salespersons, managers, and heavy duty equipment operator.**
 - **Over the past year, 59 companies reported that 92 of their drivers had transferred into other positions within the company.**

Most of the 92 drivers who transferred jobs moved into dispatch and operations. Some transferred from being drivers to warehouse staff and some transferred from drivers to managerial positions in operations, sales and planning.

C. MAGNITUDE OF THE SHORTAGES

1. Overall Shortage

One of the objectives of the project is to estimate the magnitude of the shortages. To develop an estimate of the magnitude, we used the results of the survey to project the data that we would have obtained if we had been able to survey all of the companies in our target population. In doing the projections, we have assumed that:

- Our population of 2,754 companies represents 80% of the target population. If true, the total population of companies would be 3,443 companies.
- Reflecting the results of our sample, 33% of these companies would employ no Class 1 Drivers and about 13% would no longer operate fleets based in BC. After adjusting for these factors, the number of trucking companies employing Class 1 drivers is estimated at 1,985.

The next step is to estimate the number of trucks operated by the 1,985 companies. To do so, we have divided the population into three categories including:

- The 413 companies which we surveyed. These companies reported a combined fleet of 10,285 trucks.
- 702 companies which we did not survey but for which we had data on the size of their fleet. According to the secondary data, these companies operate a combined fleet of 12,673.
- 870 companies which we did not survey and for which we do not have fleet data from a secondary source. Because we tended to focus on the largest companies in our survey, we estimate that the fleet size of these companies would average just over ten trucks per company for a combined total of 8,704 trucks.

Taken together, we estimate that the 1,985 companies in these three segments operate a combined fleet of 31,662 trucks. We then can use the results of our survey to develop projections regarding the estimated number of people currently employed, the number recently hired, the number of immediately available positions, and projected number that will be hired over the next year for Class 1 drivers and the other occupational groups. As indicated below, we estimate that the companies currently employ almost 30,000 Class 1 drivers and would hire over 3,000 more if they were available today.

PROJECTED EMPLOYMENT BY OCCUPATIONAL GROUP

| Employment | Class 1 Drivers | Dock & Warehouse | Dispatch & Operations | Fleet Maintenance |
|----------------------------|------------------------|-----------------------------|----------------------------------|--------------------------|
| Currently Employed | 29,163 | 6,699 | 6,080 | 1,958 |
| Hirings in Past 12 Months | 7,650 | 4,079 | 1,004 | 351 |
| Number Would Hire Today | 3,180 | 674 | 274 | 108 |
| Projected Hiring This Year | 6,222 | 2,414 | 523 | 274 |

The projected shortages in the other occupational categories (as defined by the number of workers that the companies would hire today if they were available) include 674 dock and warehouse workers, 274 dispatch and operations workers, and 108 fleet maintenance workers. These figures certainly do not reflect the full magnitude of the shortages in these positions in BC because there are many other organizations which employ workers in these occupational groups which do not fit within the definition of the target for this survey (e.g. there are many warehouse operations, transportation companies, and fleet maintenance operations which do not employ Class 1 drivers).

2. BCTA Members

We have conducted a similar analysis for the 401 companies included in our sample which are members of the BCTA. We have divided the population into two categories including:

- The 181 companies which we surveyed. These companies reported a combined fleet of 5,924 trucks.
- The other 220 companies which we did not survey but for which we had data on the size of their fleet. According to the data provided by the BCTA, these companies operate a combined fleet of 3,619.

Taken together, we estimate that the 401 BCTA member companies operate a combined fleet of 9,543 trucks. Again, we then can use the results of our survey to develop projections regarding the estimated number of people currently employed, the number recently hired, the number of immediately available positions, and projected number that will be hired over the next year for Class 1 drivers and the other occupational groups. As indicated below, we estimate that the companies currently employ almost 9,500 Class 1 drivers and would hire over 800 more if they were available today.

PROJECTED EMPLOYMENT BY OCCUPATIONAL GROUP

| Employment | Class 1 Drivers | Dock & Warehouse | Dispatch & Operations | Fleet Maintenance |
|----------------------------|------------------------|-----------------------------|----------------------------------|--------------------------|
| Currently Employed | 9,465 | 2,257 | 1,778 | 561 |
| Hirings in Past 12 Months | 2,469 | 1,706 | 287 | 89 |
| Number Would Hire Today | 854 | 203 | 72 | 26 |
| Projected Hiring This Year | 1,677 | 765 | 126 | 74 |

The projected shortages in the other occupational categories (as defined by the number of workers that the companies would hire today if they were available) include about 200 dock and warehouse workers, 70 dispatch and operations workers, and 25 fleet maintenance workers.

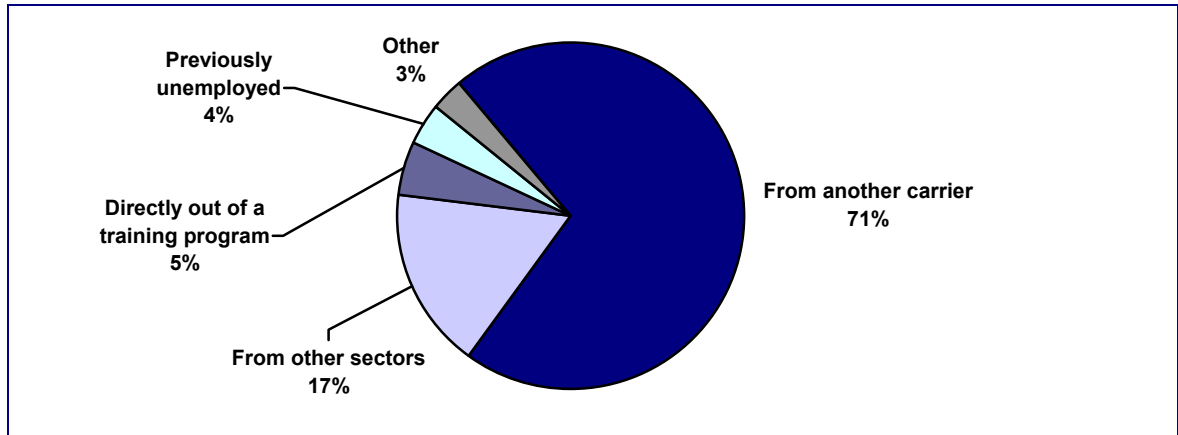
D. RECRUITMENT AND TRAINING OF EMPLOYEES

The major findings of our review regarding the recruitment and training of employees are as follows:

- **The leading source (71%) of employment over the past 12 months is hired away from another carrier.**

The trucking companies were asked to estimate the percentage of the Class 1 drivers, dispatch and operations workers, fleet maintenance workers and dock and warehouse workers were hired away from other carriers, hired from other sectors, hired directly out of a training program or where previously unemployed. As indicated below, most of the new employees came from another carrier with previous experience. Seventeen percent of employees came from other sectors while only an estimated five percent of the new hires came directly out of a training program and only four percent were previously unemployed. The results suggest that most companies are more likely to hire new staff with previous work experience or industry knowledge rather than train fresh graduates from training programs or people with no work experience.

SOURCES OF EMPLOYEES

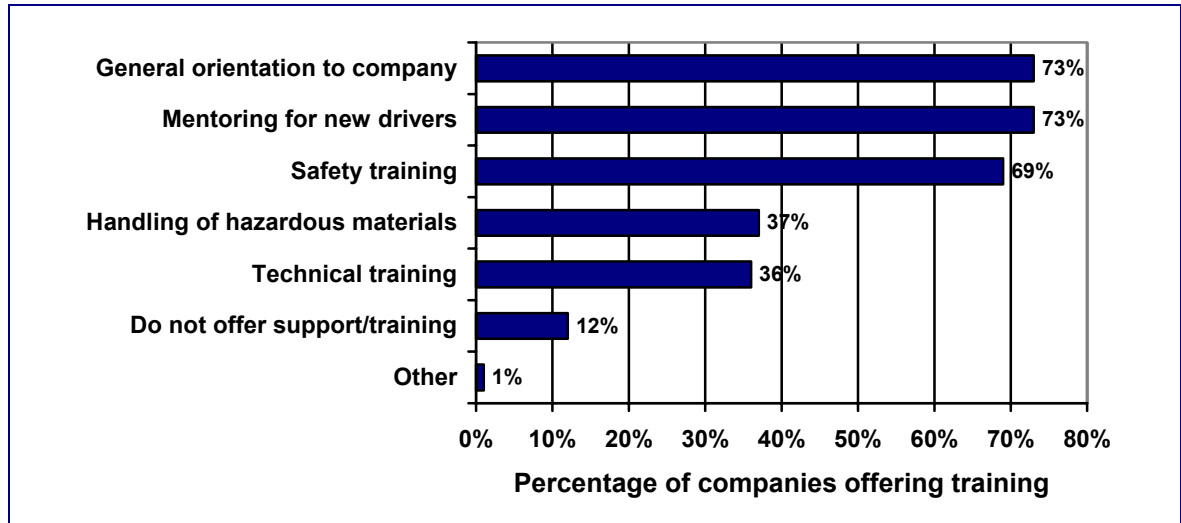


The new employees hired directly out of a training program over the past 12 months were mostly trained at local driving schools with basics of truck operation and hours of driving training. Some new workers completed the Earning-Your-Wheels training program at their local driving school.

- **Most (88%) trucking companies in BC offer at least some kind of training support.**

The most commonly offered types of training in BC focus on a general orientation to the company (73%), mentoring for new drivers (73%), safety training (69%), handling of hazardous materials (37%), and technical training (36%).

TYPES OF TRAINING OFFERED BY COMPANIES



- **Thirty percent of employers saw increased opportunities for hands-on, practical experience as the greatest need for improvement in the training programs which serve the trucking industry.**

Employers expressed some concern that the training offered at local driving schools only trained students in basic truck operation skills but did not give them practical skills in areas such as tying down wide loads, air brakes, and mountain driving. Other common recommendations for improvement included:

- ❑ Extending the length and scope of training, possibly including a graduated licensing program (identified by 23% of employers);
- ❑ Placing increased focus on road safety (16%);
- ❑ Placing increased focus on technical skills training such as pre and post trip inspection, basic maintenance (16%);
- ❑ Increasing access to apprenticeship programs which allows trainees to gain practical experience while working (15%);
- ❑ Placing increased focus on maintenance skills/mechanical equipment (6%);
- ❑ Placing increased focus city driving skills (6%);
- ❑ Working to improve the quality of the training provided such as having better instructors and equipment (5%); and
- ❑ Logbook/ paperwork training (4%).

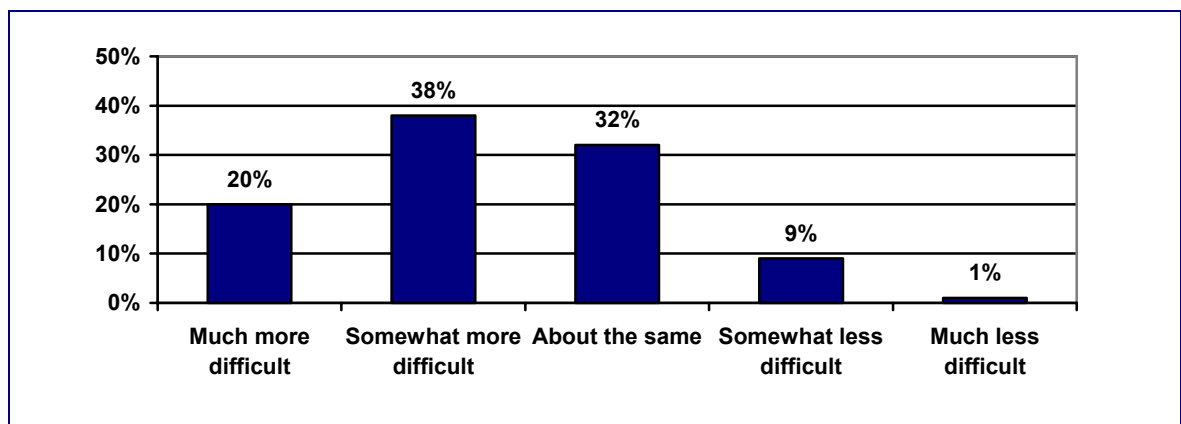
E. OUTLOOK AND STRATEGIES TO ADDRESS SHORTAGES

The major findings of the survey regarding the perceived outlook and potential strategies to address the shortages are as follows:

- **Most companies (58%) anticipate that, over the next two to three years, it will become more difficult for trucking organizations in BC to attract the workers they need.**

As indicated in the table below, only 10% of the companies expect it to become less difficult to attract workers.

ANTICIPATED LEVEL OF DIFFICULTIES IN ATTRACTING WORKERS OVER THE NEXT TWO TO THREE YEARS



Those who indicated that conditions will become more difficult highlighted:

- The limited attractiveness of the industry to youth;
- The aging of the existing work force;
- The potential for continued economic growth which will increase the demand for workers; and
- Strong competition from other industry.

Those who indicated that conditions will either stay the same or improve generally noted that there will be an economic slowdown in key sectors, particularly construction, forestry, and other natural resource sectors.

- **The companies highlighted a number of strategies and actions that they are implementing to address shortages.**

The strategies most commonly identified included:

- Providing training to enable applicants to fill the positions or progress in the organization (identified by 21% of companies);
- Offering competitive salary and benefits (18%);
- Advertising job openings (10%); and
- Networking with industry associations and organizations (3%).

- **When asked what assistance, support or tools would be helpful in addressing these shortages, 26% of the companies recommended increasing access to apprenticeship and training programs.**

Other leading recommendations include:

- ❑ Work to improve the image and promote the industry to high school students as a career path (identified by 15% of companies);
- ❑ Provide tax breaks or subsidies to encourage companies to get more involved in providing training (10%);
- ❑ Improve pay and working conditions/encourage companies to stop targeting each other’s employees (6%);
- ❑ Improve the regulatory environment (6%); and
- ❑ Undertake promotions to attract workers from other regions (1%).

F. VARIATIONS BY EMPLOYER CHARACTERISTICS

To develop a deeper understanding of the survey results, we cross-tabulated the responses by:

- Region where the operation is based (Greater Vancouver, Vancouver Island, Southern Interior, and Northern BC);
- Size of company (as defined by the number of Class 1 drivers);
- Regions served (BC, other provinces in Canada, and the United States);
- Type of carrier (for-hire carriers versus private carrier);
- Length of haul (long-haul, short-haul, and local); and
- Membership in the BCTA.

The results are presented in the following pages.

1. Cross-tabulation By Region

We cross-tabulated the responses by where the operation is based (Greater Vancouver, Vancouver Island, Southern Interior, and Northern BC). Some of the key trends include:

- The largest companies are based in the Greater Vancouver areas. As a result, the companies surveyed from the region tended to be larger in size than those surveyed from other regions and employ more people including more long haul drivers.
- As would be expected companies located in the Greater Vancouver region and southern interior are more likely to be involved in long-hauls and to travel to the US, whereas companies in Vancouver Island and Northern BC are more likely to operate short-haul and local deliveries.
- Given their larger size, employers in the Greater Vancouver region are more likely to have existing vacancies in Class 1 driver, dispatch and operation, and dock & warehouse positions.
- Average ratings regarding difficulties in hiring by position did not vary significantly by region.

The results are shown below.

SUMMARY OF RESPONSES BY REGION

| Characteristics | Greater Vancouver | Vancouver Island | Southern Interior | Northern BC |
|--|-------------------|------------------|-------------------|-------------|
| Employers Surveyed | 195 | 76 | 80 | 54 |
| Fleet Size | | | | |
| Average | 30.3 | 14.6 | 20.1 | 17.1 |
| Type of Carrier | | | | |
| For Hire | 84.1% | 84.2% | 91.3% | 92.6% |
| Private | 11.8% | 14.5% | 7.5% | 1.9% |
| Other | 4.1% | 1.3% | 1.3% | 5.6% |
| Total | 100% | 100% | 100% | 100% |
| Distribution of Drivers | | | | |
| Long Haul | 41.8% | 22.4% | 55.2% | 21.3% |
| Short Haul | 48.9% | 61.2% | 40.7% | 60.5% |
| Local | 9.3% | 16.4% | 4.1% | 18.2% |
| Total | 100% | 100% | 100% | 100% |
| Average Employment Per Company (average number currently employed) | | | | |
| Total Employment | 61.4 | 35.3 | 35.8 | 27.6 |
| Class 1 Drivers | 30.2 | 12.0 | 17.7 | 15.9 |
| Fleet Maintenance | 1.4 | 1.5 | 1.6 | 2.1 |
| Dispatch and Operation | 6.4 | 2.6 | 4.0 | 3.2 |
| Dock & Warehouse Operations | 9.1 | 2.0 | 0.9 | 0.5 |
| Recent Hiring Over the Past 12 Months (% of employers hiring and average number hired) | | | | |
| Class 1 Drivers | 75.9% 7.9 | 63.2% 3.1 | 65.0% 5.0 | 66.7% 4.7 |
| Fleet Maintenance | 10.3% 0.2 | 10.5% 0.5 | 12.5% 0.3 | 14.8% 0.2 |
| Dispatch and Operation | 52.3% 1.2 | 21.1% 0.4 | 25.0% 0.6 | 22.2% 0.3 |
| Dock & Warehouse Operations | 20.5% 6.1 | 10.5% 1.1 | 7.5% 0.2 | 5.6% 0.1 |
| Current Level of Job Vacancies (% of employers reporting and average number of vacancies) | | | | |
| Class 1 Drivers | 55.9% 3.0 | 31.6% 1.6 | 45.0% 2.5 | 35.2% 1.3 |
| Fleet Maintenance | 5.1% 0.1 | 5.3% 0.1 | 3.8% 0.1 | 7.4% 0.1 |
| Dispatch and Operation | 19.5% 0.4 | 7.9% 0.1 | 6.3% 0.1 | 3.7% 0.0 |
| Dock & Warehouse Operations | 10.8% 1.0 | 3.9% 0.1 | 2.5% 0.0 | 0.0% 0.0 |
| Projected Hiring Over the Next Year (% of employers hiring and average number hiring) | | | | |
| Class 1 Drivers | 79.5% 6.1 | 64.5% 2.0 | 65.0% 3.7 | 61.1% 2.4 |
| Fleet Maintenance | 13.8% 0.2 | 6.6% 0.1 | 17.5% 0.2 | 18.5% 0.3 |
| Dispatch and Operation | 32.8% 0.7 | 14.5% 0.2 | 17.5% 0.2 | 18.5% 0.2 |
| Dock & Warehouse Operations | 20.5% 3.7 | 11.8% 0.4 | 10.0% 0.2 | 5.6% 0.1 |
| Average Difficulties in Hiring By Position (where 1 is not at all difficult and 5 is very difficult) | | | | |
| Class 1 Drivers | 4.0 | 3.6 | 3.9 | 4.0 |
| Fleet Maintenance | 3.9 | 3.4 | 3.9 | 3.8 |
| Dispatch and Operation | 3.3 | 3.2 | 3.2 | 3.3 |
| Dock & Warehouse Operations | 3.0 | 2.9 | 2.6 | 2.4 |
| Expected Change in Difficulties Over Next 2 to 3 Years (where 1 is much more difficult, 3 is about the same and 5 is much less difficult) | | | | |
| Average Rating | 2.3 | 2.2 | 2.4 | 2.5 |
| Source of Employees | | | | |
| From another carrier | 71.1% | 52.3% | 78.2% | 77.9% |
| From other sectors | 19.7% | 19.0% | 11.2% | 10.4% |
| Directly out of training program | 4.7% | 7.0% | 4.8% | 6.8% |
| Previously unemployed | 1.9% | 12.2% | 2.8% | 5.0% |
| Other | 2.5% | 9.5% | 3.1% | 0% |
| Total | 100% | 100% | 100% | 100% |

| Characteristics | Greater Vancouver | Vancouver Island | Southern Interior | Northern BC |
|---------------------------------|-------------------|------------------|-------------------|-------------|
| Training Provided | | | | |
| General orientation to company | 79.8% | 54.8% | 78.2% | 73.6% |
| Mentoring for new drivers | 74.6% | 72.6% | 76.9% | 71.7% |
| Safety training | 73.6% | 69.9% | 65.4% | 64.2% |
| Handling of hazardous materials | 37.8% | 35.6% | 34.6% | 39.6% |
| Technical training | 34.7% | 42.5% | 33.3% | 35.8% |
| None | 10.4% | 12.3% | 14.1% | 15.1% |
| Other | 1.0% | 0% | 1.3% | 0% |

2. Cross-tabulation By Size of Company

We cross-tabulated the responses by the size of operation (range in the number of Class 1 drivers). Some of the key trends include:

- Smaller companies are somewhat less likely to have long-haul operations and somewhat more likely to serve local markets.
- Vacancies in and projected hiring of Class 1 Drivers and fleet maintenance workers tend to increase with the size of company.
- Average rating regarding difficulties in hiring by position did not vary significantly by size of company.
- Larger companies are somewhat more likely to indicate that they source employees from other carriers.
- Larger companies are somewhat more likely to indicate that they provide training to employees.

The results are shown below.

SUMMARY OF RESPONSES BY SIZE OF COMPANIES

| Characteristics | 1 to 10 drivers | 11 to 20 drivers | 21 to 40 drivers | 41 and over |
|--------------------------------|-----------------|------------------|------------------|-------------|
| Employers Surveyed | 204 | 93 | 68 | 48 |
| Fleet Size | | | | |
| Average | 7.7 | 18.1 | 30.0 | 104.4 |
| Type of Carrier | | | | |
| For Hire | 87.3% | 83.9% | 86.8% | 89.6% |
| Private | 9.3% | 12.9% | 10.3% | 8.3% |
| Other | 3.4% | 3.2% | 3.0% | 2.1% |
| Total | 100% | 100% | 100% | 100% |
| Distribution of Drivers | | | | |
| Long Haul | 31.1% | 37.4% | 41.6% | 45.2% |
| Short Haul | 47.2% | 45.1% | 52.8% | 48.2% |
| Local | 21.7% | 17.5% | 5.6% | 6.6% |
| Total | 100% | 100% | 100% | 100% |

| Characteristics | 1 to 10 drivers | 11 to 20 drivers | 21 to 40 drivers | 41 and over |
|--|-----------------|------------------|------------------|-------------|
| Average Employment Per Company (average number currently employed) | | | | |
| Total Employment | 19.7 | 37.8 | 67.0 | 158.5 |
| Class 1 Drivers | 4.9 | 14.9 | 28.6 | 107.1 |
| Fleet Maintenance | 0.8 | 1.0 | 1.5 | 5.7 |
| Dispatch and Operation | 2.2 | 4.4 | 6.2 | 14.6 |
| Dock & Warehouse Operations | 1.2 | 3.9 | 8.4 | 20.7 |
| Recent Hiring Over the Past 12 Months (% of employers hiring and average number hired) | | | | |
| Class 1 Drivers | 56.4% 2.1 | 81.7% 3.3 | 82.4% 7.5 | 89.6% 25.8 |
| Fleet Maintenance | 36.6% 0.2 | 47.3% 0.1 | 51.5% 0.5 | 62.5% 0.9 |
| Dispatch and Operation | 88.7% 0.3 | 97.8% 0.7 | 98.5% 1.2 | 91.7% 2.5 |
| Dock & Warehouse Operations | 22.1% 0.4 | 28.0% 6.0 | 42.6% 2.9 | 43.8% 10.1 |
| Current Level of Job Vacancies (% of employers reporting and average number of vacancies) | | | | |
| Class 1 Drivers | 33.3% 0.8 | 57.0% 1.9 | 52.9% 3.8 | 70.8% 8.9 |
| Fleet Maintenance | 2.5% 0.0 | 3.2% 0.0 | 10.3% 0.2 | 12.5% 0.2 |
| Dispatch and Operation | 5.9% 0.1 | 9.7% 0.3 | 14.7% 0.3 | 41.7% 0.8 |
| Dock & Warehouse Operations | 4.4% 0.1 | 4.3% 0.3 | 8.8% 0.3 | 18.8% 3.0 |
| Projected Hiring Over the Next Year (% of employers hiring and average number hiring) | | | | |
| Class 1 Drivers | 63.2% 1.5 | 76.3% 3.1 | 80.9% 5.4 | 83.3% 22.1 |
| Fleet Maintenance | 8.8% 0.1 | 9.7% 0.1 | 17.6% 0.3 | 35.4% 0.8 |
| Dispatch and Operation | 16.2% 0.2 | 22.6% 0.3 | 32.4% 0.6 | 50.0% 1.2 |
| Dock & Warehouse Operations | 10.3% 0.4 | 11.8% 0.4 | 26.5% 1.6 | 25.0% 11.8 |
| Average Difficulties in Hiring By Position (where 1 is not at all difficult and 5 is very difficult) | | | | |
| Class 1 Drivers | 4.0 | 3.9 | 4.1 | 3.7 |
| Fleet Maintenance | 3.6 | 3.9 | 3.8 | 4.2 |
| Dispatch and Operation | 3.1 | 3.2 | 3.5 | 3.6 |
| Dock & Warehouse Operations | 2.9 | 3.1 | 3.0 | 2.5 |
| Expected Change in Difficulties Over Next 2 to 3 Years (where 1 is much more difficult, 3 is about the same and 5 is much less difficult) | | | | |
| Average Rating | 2.3 | 2.4 | 2.3 | 2.4 |
| Source of Employees | | | | |
| From another carrier | 64.9% | 71.9% | 74.2% | 79.4% |
| From other sectors | 17.8% | 16.8% | 16.2% | 15.1% |
| Directly out of training program | 7.0% | 3.8% | 4.2% | 4.0% |
| Previously unemployed | 5.9% | 3.8% | 2.1% | 1.6% |
| Other | 4.3% | 3.8% | 3.2% | 3.2% |
| Total | 100% | 100% | 100% | 100% |
| Training Provided | | | | |
| General orientation to company | 66.2% | 73.1% | 83.8% | 83.3% |
| Mentoring for new drivers | 64.2% | 80.6% | 82.4% | 81.3% |
| Safety training | 58.3% | 76.3% | 77.9% | 85.4% |
| Handling of hazardous materials | 27.0% | 35.5% | 51.5% | 62.5% |
| Technical training | 31.9% | 37.6% | 42.6% | 37.5% |
| None | 17.6% | 8.6% | 1.5% | 10.4% |
| Other | 0.0% | 1.1% | 1.5% | 2.1% |

3. Cross-tabulation By Regions Served

We cross-tabulated the responses by the regions served (BC, other provinces in Canada, and the United States). Companies can serve more than one market and therefore can be included in more than one category. Some of the key trends include:

- Companies serving the US market tend to be somewhat larger in size than those serving BC or other provinces.
- Companies serving the US market tend to have a higher percentage of their drivers working long-haul routes.
- Companies serving the US market tend to have higher numbers of vacancies in Class 1 drivers and to project greater hiring levels over the next year. However, average ratings regarding difficulties in hiring by position did not vary significantly by region served.
- Common sources of employees and provision of training did not vary significantly by region served.

The results are shown below.

SUMMARY OF RESPONSES BY REGIONS SERVED

| Characteristics | Provincial | Other Provinces | US |
|--|------------|-----------------|-----------|
| Employers Surveyed | 396 | 213 | 148 |
| Fleet Size | | | |
| Average | 24.8 | 29.4 | 31.1 |
| Type of Carrier | | | |
| For Hire | 86.9% | 88.7% | 89.9% |
| Private | 10.4% | 7.5% | 7.4% |
| Other | 2.8% | 3.8% | 2.7% |
| Total | 100% | 100% | 100% |
| Distribution of Drivers | | | |
| Long Haul | 40.3% | 58.5% | 62.4% |
| Short Haul | 50.0% | 33.1% | 29.8% |
| Local | 9.8% | 8.4% | 7.8% |
| Total | 100% | 100% | 100% |
| Average Employment Per Company (average number currently employed) | | | |
| Total Employment | 48.9 | 48.4 | 50.3 |
| Class 1 Drivers | 22.8 | 27.4 | 30.0 |
| Fleet Maintenance | 1.6 | 1.4 | 1.2 |
| Dispatch and Operation | 4.8 | 5.6 | 6.0 |
| Dock & Warehouse Operations | 5.5 | 3.9 | 3.8 |
| Recent Hiring Over the Past 12 Months (% of employers hiring and average number hired) | | | |
| Class 1 Drivers | 69.7% 6.0 | 74.6% 7.6 | 77.7% 8.5 |
| Fleet Maintenance | 11.4% 0.3 | 12.2% 0.3 | 10.1% 0.2 |
| Dispatch and Operation | 36.1% 0.8 | 44.6% 1.0 | 51.4% 1.0 |
| Dock & Warehouse Operations | 14.6% 3.3 | 16.9% 1.0 | 16.2% 1.0 |
| Current Level of Job Vacancies (% of employers reporting and average number of vacancies) | | | |
| Class 1 Drivers | 46.0% 2.5 | 56.8% 3.6 | 65.5% 4.1 |
| Fleet Maintenance | 5.1% 0.1 | 6.1% 0.1 | 4.1% 0.1 |
| Dispatch and Operation | 12.1% 0.2 | 15.5% 0.3 | 16.9% 0.3 |
| Dock & Warehouse Operations | 7.1% 0.6 | 7.5% 0.3 | 8.1% 0.3 |

| Characteristics | Provincial | | Other Provinces | | US | |
|--|------------|-----|-----------------|-----|-------|-----|
| Projected Hiring Over the Next Year (% of employers hiring and average number hiring) | | | | | | |
| Class 1 Drivers | 71.0% | 4.8 | 75.1% | 6.8 | 81.8% | 8.1 |
| Fleet Maintenance | 13.6% | 0.2 | 16.4% | 0.2 | 12.2% | 0.2 |
| Dispatch and Operation | 24.0% | 0.4 | 29.1% | 0.5 | 31.1% | 0.6 |
| Dock & Warehouse Operations | 15.4% | 2.0 | 17.8% | 0.8 | 17.6% | 0.8 |
| Average Difficulties in Hiring By Position (where 1 is not at all difficult and 5 is very difficult) | | | | | | |
| Class 1 Drivers | 4.0 | | 4.0 | | 4.1 | |
| Fleet Maintenance | 3.8 | | 3.9 | | 3.9 | |
| Dispatch and Operation | 3.3 | | 3.3 | | 3.2 | |
| Dock & Warehouse Operations | 2.9 | | 2.9 | | 3.0 | |
| Expected Change in Difficulties Over Next 2 to 3 Years (where 1 is much more difficult, 3 is about the same and 5 is much less difficult) | | | | | | |
| Average Rating | 2.4 | | 2.4 | | 2.2 | |
| Source of Employees | | | | | | |
| From another carrier | 70.2% | | 77.1% | | 75.2% | |
| From other sectors | 16.8% | | 12.6% | | 12.6% | |
| Directly out of training program | 5.3% | | 5.0% | | 5.2% | |
| Previously unemployed | 4.2% | | 3.0% | | 3.7% | |
| Other | 3.5% | | 2.3% | | 3.3% | |
| Total | 100% | | 100% | | 100% | |
| Training Provided | | | | | | |
| General orientation to company | 73.0% | | 77.0% | | 75.0% | |
| Mentoring for new drivers | 72.7% | | 76.5% | | 74.3% | |
| Safety training | 68.9% | | 72.3% | | 69.6% | |
| Handling of hazardous materials | 37.1% | | 36.2% | | 33.8% | |
| Technical training | 35.6% | | 37.1% | | 37.8% | |
| None | 12.4% | | 12.7% | | 10.8% | |
| Other | 0.5% | | 0.9% | | 1.4% | |

4. Cross-tabulation By Type of Carrier

We cross-tabulated the responses by the type of carrier (for-hire carriers versus private carrier). Some of the key trends include:

- As would be expected, for-hire carriers are more likely than private carriers to be involved in long-hauls and to travel to the US.
- Private carriers are much larger in size in terms of total employment but, on average, have about the same number of Class 1 drivers as for-hire carriers.
- Despite having similar numbers of Class 1 drivers, for-hire carriers tend to have higher numbers of vacancies in Class 1 drivers, have hired more drivers in the past year, and project greater hiring levels over the next year.
- For-hire carriers are more likely to hire employees from another carrier.
- Private carriers are more likely provide training, which is likely a function of the larger average size of organization.

The results are shown below.

SUMMARY OF RESPONSES BY TYPE OF CARRIER

| Characteristics | For-hire | Private |
|--|-----------|------------|
| Employers Surveyed | 358 | 42 |
| Fleet Size | | |
| Average | 25.2 | 24.3 |
| Distribution of Drivers | | |
| Long Haul | 44.5% | 17.3% |
| Short Haul | 46.2% | 71.6% |
| Local | 9.3% | 11.1% |
| Total | 100% | 100% |
| Average Employment Per Company (average number currently employed) | | |
| Total Employment | 37.0 | 152.0 |
| Class 1 Drivers | 23.3 | 22.2 |
| Fleet Maintenance | 1.5 | 2.2 |
| Dispatch and Operation | 4.7 | 5.7 |
| Dock & Warehouse Operations | 3.1 | 24.8 |
| Recent Hiring Over the Past 12 Months (% of employers hiring and average number hired) | | |
| Class 1 Drivers | 69.0% 6.3 | 76.2% 4.1 |
| Fleet Maintenance | 9.8% 0.2 | 16.7% 0.5 |
| Dispatch and Operation | 35.8% 0.8 | 40.5% 1.0 |
| Dock & Warehouse Operations | 11.5% 2.1 | 38.1% 13.3 |
| Current Level of Job Vacancies (% of employers reporting and average number of vacancies) | | |
| Class 1 Drivers | 46.1% 2.7 | 38.1% 1.1 |
| Fleet Maintenance | 4.7% 0.1 | 4.8% 0.1 |
| Dispatch and Operation | 12.0% 0.2 | 7.1% 0.2 |
| Dock & Warehouse Operations | 5.6% 0.2 | 19.0% 3.3 |
| Projected Hiring Over the Next Year (% of employers hiring and average number hiring) | | |
| Class 1 Drivers | 69.8% 5.2 | 73.8% 3.4 |
| Fleet Maintenance | 12.8% 0.2 | 14.3% 0.2 |
| Dispatch and Operation | 24.3% 0.4 | 21.4% 0.5 |
| Dock & Warehouse Operations | 12.8% 0.5 | 35.7% 14.1 |
| Average Difficulties in Hiring By Position (where 1 is not at all difficult and 5 is very difficult) | | |
| Class 1 Drivers | 3.9 | 3.7 |
| Fleet Maintenance | 3.8 | 3.8 |
| Dispatch and Operation | 3.3 | 2.9 |
| Dock & Warehouse Operations | 2.9 | 3.0 |
| Expected Change in Difficulties Over Next 2 to 3 Years (where 1 is much more difficult, 3 is about the same and 5 is much less difficult) | | |
| Average Rating | 2.3 | 2.5 |
| Source of Employees | | |
| From another carrier | 72.5% | 54.9% |
| From other sectors | 14.8% | 29.1% |
| Directly out of training program | 5.5% | 4.5% |
| Previously unemployed | 4.7% | 0.0% |
| Other | 2.5% | 11.4% |
| Total | 100% | 100% |
| Training Provided | | |
| General orientation to company | 71.2% | 83.3% |
| Mentoring for new drivers | 71.5% | 88.1% |
| Safety training | 66.2% | 90.5% |
| Handling of hazardous materials | 34.4% | 52.4% |
| Technical training | 35.2% | 35.7% |
| None | 13.1% | 2.4% |
| Other | 0.3% | 4.8% |

5. Cross-tabulation By Length of Haul

We cross-tabulated the responses by the length of haul (long-haul, short-haul, and local). Companies can serve more than one market and therefore can be in more than one category. Some of the key trends include:

- Companies serving the long-haul market tend to be larger in size in terms of fleet size than those serving short-haul or local markets.
- Because of their larger size, long-haul companies tend to have higher numbers of vacancies in Class 1 drivers, have hired more in the past year, and project greater hiring levels over the next year.
- Average ratings regarding difficulties in hiring by position did not vary significantly by length of haul.
- Longer-haul companies are more likely than local haul companies to indicate that they source employees from other carriers.

The results are shown below.

SUMMARY OF RESPONSES BY LENGTH OF HAUL

| Characteristics | Long Haul | | Short Haul | | Local | |
|--|-----------|-----|------------|-----|-------|-----|
| Employers Surveyed | 200 | | 255 | | 103 | |
| Fleet Size | | | | | | |
| Average | 32.2 | | 27.9 | | 19.4 | |
| Type of Carrier | | | | | | |
| For Hire | 88.0% | | 86.3% | | 84.5% | |
| Private | 9.0% | | 11.4% | | 10.7% | |
| Other | 3.0% | | 2.4% | | 4.9% | |
| Total | 100% | | 100% | | 100% | |
| Average Employment Per Company (average number currently employed) | | | | | | |
| Total Employment | 52.2 | | 58.4 | | 35.1 | |
| Class 1 Drivers | 30.1 | | 26.9 | | 18.3 | |
| Fleet Maintenance | 1.6 | | 2.0 | | 1.3 | |
| Dispatch and Operation | 5.9 | | 5.4 | | 4.5 | |
| Dock & Warehouse Operations | 3.7 | | 6.9 | | 2.9 | |
| Recent Hiring Over the Past 12 Months (% of employers hiring and average number hired) | | | | | | |
| Class 1 Drivers | 76.0% | 7.8 | 71.0% | 7.4 | 72.8% | 4.5 |
| Fleet Maintenance | 12.0% | 0.4 | 12.5% | 0.4 | 15.5% | 0.2 |
| Dispatch and Operation | 46.5% | 1.0 | 36.9% | 0.9 | 37.9% | 0.7 |
| Dock & Warehouse Operations | 17.5% | 0.9 | 16.1% | 4.8 | 15.5% | 0.8 |
| Current Level of Job Vacancies (% of employers reporting and average number of vacancies) | | | | | | |
| Class 1 Drivers | 58.0% | 3.8 | 43.1% | 3.0 | 47.6% | 2.5 |
| Fleet Maintenance | 5.5% | 0.1 | 6.3% | 0.1 | 3.9% | 0.0 |
| Dispatch and Operation | 16.5% | 0.3 | 12.9% | 0.2 | 12.6% | 0.2 |
| Dock & Warehouse Operations | 8.5% | 0.3 | 7.5% | 0.7 | 5.8% | 0.1 |
| Projected Hiring Over the Next Year (% of employers hiring and average number hiring) | | | | | | |
| Class 1 Drivers | 77.0% | 7.2 | 73.3% | 5.3 | 68.0% | 3.8 |
| Fleet Maintenance | 16.5% | 0.3 | 18.0% | 0.3 | 9.7% | 0.2 |
| Dispatch and Operation | 30.0% | 0.5 | 25.1% | 0.4 | 23.3% | 0.4 |
| Dock & Warehouse Operations | 16.5% | 0.7 | 16.1% | 2.7 | 14.6% | 0.5 |

| Characteristics | Long Haul | Short Haul | Local |
|--|-----------|------------|-------|
| Average Difficulties in Hiring By Position (where 1 is not at all difficult and 5 is very difficult) | | | |
| Class 1 Drivers | 3.9 | 3.9 | 3.8 |
| Fleet Maintenance | 4.0 | 3.9 | 3.3 |
| Dispatch and Operation | 3.3 | 3.3 | 3.2 |
| Dock & Warehouse Operations | 2.9 | 2.9 | 2.7 |
| Expected Change in Difficulties Over Next 2 to 3 Years (where 1 is much more difficult, 3 is about the same and 5 is much less difficult) | | | |
| Average Rating | 2.3 | 2.4 | 2.1 |
| Source of Employees | | | |
| From another carrier | 73.0% | 71.9% | 53.3% |
| From other sectors | 15.2% | 16.0% | 22.2% |
| Directly out of training program | 6.0% | 5.6% | 9.5% |
| Previously unemployed | 3.7% | 3.8% | 9.3% |
| Other | 2.1% | 2.6% | 5.7% |
| Total | 100% | 100% | 100% |
| Training Provided | | | |
| General orientation to company | 75.0% | 75.3% | 65.0% |
| Mentoring for new drivers | 76.0% | 76.1% | 74.8% |
| Safety training | 69.0% | 70.6% | 72.8% |
| Handling of hazardous materials | 35.0% | 42.7% | 39.8% |
| Technical training | 35.0% | 34.1% | 41.7% |
| None | 12.5% | 12.2% | 4.9% |
| Other | 1.5% | 1.2% | 1.9% |

6. Membership in the BCTA

We cross-tabulated the responses by whether the employer is a member of the BCTA. Some of the key trends include:

- On average, BCTA member companies tend to be significantly larger in terms of fleet size, total employment, and Class 1 drivers comparing to non-member companies.
- As a result of larger fleet size, BCTA members have hired more Class 1 drivers, dispatch and operational personnel, and dock and warehouse staff over the past year and have more than double the number of vacancies for Class 1 drivers than those of non-member companies’.
- Average hiring difficulties and expected change in difficulties did not vary significantly between member and non-members.
- BCTA member companies are more likely to provide different kinds of training support for their staff.

The results are shown below.

SUMMARY OF RESPONSES BY MEMBERSHIP IN THE BCTA

| Characteristics | Member | Non-Member |
|--|-----------|------------|
| Employers Surveyed | 181 | 232 |
| Fleet Size | | |
| Average | 32.7 | 18.9 |
| Type of Carrier | | |
| For Hire | 85.1% | 87.9% |
| Private | 13.3% | 7.8% |
| Other | 1.7% | 4.3% |
| Total | 100% | 100% |
| Average Employment Per Company (average number currently employed) | | |
| Total Employment | 68.4 | 32.0 |
| Class 1 Drivers | 32.5 | 15.5 |
| Fleet Maintenance | 1.9 | 1.2 |
| Dispatch and Operation | 6.1 | 3.8 |
| Dock & Warehouse Operations | 7.7 | 3.3 |
| Recent Hiring Over the Past 12 Months (% of employers hiring and average number hired) | | |
| Class 1 Drivers | 77.9% 8.5 | 64.2% 4.1 |
| Fleet Maintenance | 13.8% 0.3 | 9.1% 0.3 |
| Dispatch and Operation | 43.6% 1.0 | 31.5% 0.6 |
| Dock & Warehouse Operations | 19.9% 5.9 | 9.9% 1.2 |
| Current Level of Job Vacancies (% of employers reporting and average number of vacancies) | | |
| Class 1 Drivers | 49.7% 2.9 | 43.5% 2.2 |
| Fleet Maintenance | 6.1% 0.1 | 4.3% 0.1 |
| Dispatch and Operation | 12.7% 0.3 | 12.1% 0.2 |
| Dock & Warehouse Operations | 8.8% 0.7 | 5.2% 0.4 |
| Projected Hiring Over the Next Year (% of employers hiring and average number hiring) | | |
| Class 1 Drivers | 73.5% 5.8 | 69.0% 4.2 |
| Fleet Maintenance | 14.4% 0.3 | 12.9% 0.2 |
| Dispatch and Operation | 24.9% 0.4 | 23.7% 0.4 |
| Dock & Warehouse Operations | 18.2% 2.6 | 12.5% 1.3 |
| Average Difficulties in Hiring By Position (where 1 is not at all difficult and 5 is very difficult) | | |
| Class 1 Drivers | 3.9 | 4.0 |
| Fleet Maintenance | 3.9 | 3.7 |
| Dispatch and Operation | 3.4 | 3.1 |
| Dock & Warehouse Operations | 3.0 | 2.8 |
| Expected Change in Difficulties Over Next 2 to 3 Years (where 1 is much more difficult, 3 is about the same and 5 is much less difficult) | | |
| Average Rating | 2.3 | 2.4 |
| Source of Employees | | |
| From another carrier | 74.5% | 67.1% |
| From other sectors | 17.4% | 16.4% |
| Directly out of training program | 4.0% | 6.3% |
| Previously unemployed | 1.8% | 6.0% |
| Other | 2.3% | 4.2% |
| Total | 100% | 100% |
| Training Provided | | |
| General orientation to company | 81.2% | 65.9% |
| Mentoring for new drivers | 79.0% | 68.1% |
| Safety training | 76.8% | 62.5% |
| Handling of hazardous materials | 42.0% | 33.2% |
| Technical training | 35.9% | 35.3% |
| None | 8.8% | 14.7% |
| Other | 1.1% | 0.4% |

APPENDIX I

TELEPHONE QUESTIONNAIRE

TELEPHONE QUESTIONNAIRE

Hello, my name is _____ and I'm with Ference Weicker & Company, a management consulting firm. We are conducting interviews with trucking employers in BC to determine human resource requirements and identify specific skills shortages. You may have received an e-mail or fax from the BC Trucking Association recently about the project. Do you recall receiving that?

(if doesn't recall, explain the project) The information we collect will be used by the BC Trucking Human Resources Planning Committee in updating its Strategic Human Resource Plan for the industry. I can go through the questionnaire with you right now if you have a few minutes. If not, can we set up another time?

CONTACT INFORMATION

| | |
|-----------------------------|--|
| Respondent | |
| Name of the Business | |
| ID Code | |
| Phone Number | |
| Date Completed | |

A. CLASS 1 DRIVERS

- How many Class 1 truck drivers do you currently employ or contract with including company drivers, owner-operators, and agency or leased drivers?

| Employment | Number of Class 1 Drivers |
|--------------------------|----------------------------------|
| Company drivers | |
| Owner-operators | |
| Agency or leased drivers | |
| Other (specify): | |
| Total | |

IF NONE, THANK THE RESPONDENT AND END THE INTERVIEW

2. How many of your Class 1 drivers are primarily:

| Focus | Number |
|--|--------|
| Long haul drivers (stays overnight)? | |
| Short haul drivers (no stays overnight, between cities)? | |
| Local drivers (same city/metro area)? | |
| Other (specify): | |
| Total | |

3. How many Class 1 truck drivers did your organization hire or contract with in BC over the past 12 months?

_____ Number Hired over the Past 12 Months

4. How many would you have hired or contracted with if they had been available?

_____ Number Would Have Hired

5. How many more Class 1 truck drivers would you hire or contract with on a full-time basis right now if they were available?

_____ Full-time Drivers Would Hire Right Now

6. Over the next 12 months, how many new Class 1 truck drivers do you anticipate that you will hire or contract with on a full-time basis to fill new positions or replace drivers who may leave?

_____ Number Expecting to Hire

6a. (if 1 or more) On a scale of 1 to 5, where 1 is not at all difficult, 3 is somewhat difficult and 5 is very difficult, how difficult do you think it will be to meet your needs for Class 1 drivers?

| | | | | | |
|------------|---|----------|---|------|--|
| Not at All | | Somewhat | | Very | |
| 1 | 2 | 3 | 4 | 5 | |
| N/A | | | | | |

6b. (if 3 or more) Why is that? _____

B. DESCRIPTION OF THE FLEET

1. What is the size of your company's current fleet in British Columbia, including owner-operators?

_____ # Tractor-trailer trucks (number of power units)

_____ # Straight trucks

2. Does your fleet in British Columbia operate strictly in BC or do your trucks regularly travel to other provinces or to the United States? (Check all that apply)

- a. _____ Provincial
- b. _____ Other provinces
- c. _____ United States
- d. _____ Other (_____)

3. Which of the following best describes your company's fleet? (Check one only)

- a. _____ For-hire carrier (a carrier that primarily hauls other's freight)
- b. _____ Private carrier (a carrier that primarily hauls its own freight)
- c. _____ Both a private and for-hire carrier
- d. _____ Other (_____)

4. How many employees does your organization have in BC in total?

_____ Total Number of Employees in BC

C. OTHER OCCUPATIONS

In addition to Class I drivers, we are interested in getting input regarding other occupations related to your trucking operations. More specifically, we would like to find out how many people you currently employ, recently hired and plan to hire in the following occupation areas:

(Descriptions are provided for reference purposes only).

| Category | |
|--|--|
| Dispatch & Operation | <ul style="list-style-type: none"> • Plan routes effectively • Ensure the right equipment is used and both driver and equipment meet customers' needs and all legal requirements • Act as the first point of contact for new and existing customers, which may include managing customer complaints • Supervise drivers and manage vehicles and equipment • Handle billing, licensing and permitting • May administer drug and alcohol testing programs • Design and implement policies to reduce personal injury, and cargo and equipment losses |
| Fleet Maintenance | <ul style="list-style-type: none"> • Develop and implement preventative maintenance programs • Perform inspections on trucks, trailers and other equipment • Repair and maintain all trucks, trailers, and other equipment |
| Dock & Warehouse Operations | <ul style="list-style-type: none"> • Effectively move goods around in warehouses and to and from trucks using, for instance, forklifts and other loading equipment • Safely and efficiently unload and load trucks, trailers and other equipment • Handle dangerous goods if necessary |

| Position | Dispatch & Operation | Fleet Maintenance | Dock/Warehouse Operations |
|--|---|---|--|
| <p>Examples of (name of occupational area) positions include:</p> | <p><i>Customer Service, Dispatcher, Fleet Supervisor, Billing Administrator, Safety & Loss Prevention Personnel, and Operations Mgr</i></p> | <p><i>Mechanic, Wheel/Tire Technician, Welder, Shop Floor Supervisor, Parts Supervisor, Maintenance Mgr</i></p> | <p><i>Dock Worker, Forklift Operator, Dock Supervisor, Warehouse Mgr</i></p> |
| <p>1. How many people do you currently employ for which this is their primary area of responsibility?</p> | | | |
| <p>2. How many did your organization hire in BC over the past 12 months?</p> | | | |
| <p>3. How many more people in this area would you hire right now if they were available?</p> | | | |
| <p>4. Over the next 12 months, how many people in this area do you anticipate that you will hire on a full-time basis to fill new positions or replace staff members who may leave?</p> | | | |
| <p>5. On a scale of 1 to 5, where 1 is not at all difficult, 3 is somewhat difficult and 5 is very difficult, how difficult do you think it will be to meet your hiring needs?</p> | | | |
| <p>5a. (if more than 3) What positions or functions will be toughest to fill?</p> | | | |

IF NO POSITIONS OR FUNCTIONS IDENTIFIED, SKIP TO QUESTION 7

5b. What other positions within your organization are tough to fill? _____

6. Over the past year, how many of your employees transferred from being drivers with your organization to working in Dispatch & Operation, Fleet Maintenance or Dock/Warehouse Operations?

_____ Total Number of Drivers Transferred

6a. (if any identified) In to which positions did they transfer? _____

6b. You indicated that _____ (list all positions or functions mentioned) _____ will be difficult to fill. What do you see as the major factors that contribute to these shortages (e.g., nature of the job/working conditions, lack of training, competition with other industry sectors, competition from other transportation companies, pay, attractiveness of the occupation to youth, aging of the work force, etc.)? _____

6c. What actions is your organization taking to address these shortages? _____

6d. **What assistance, support or tools would be helpful to you regarding these shortages?** (e.g., financial incentives, HR “how to” guide, training programs, national recruiting, international recruiting, promotion of industry careers, better connections with labour pools, etc.) _____

7. **Over the next two to three years, do you anticipate that it will become much more difficult, somewhat more difficult, about the same, somewhat less difficult or much less difficult for trucking organizations in BC to attract the workers they need?**

- a. _____ Much more difficult
- b. _____ Somewhat more difficult
- c. _____ About the same
- d. _____ Somewhat less difficult
- e. _____ Much less difficult
- f. _____ Other (_____)
- g. _____ Not sure

7a. **Why is that?** _____

D. PRACTICES AND NEEDS

1. **With respect to the positions we have talked about today, approximately what percent of the people that you hired over the past year were:**

| Employment | Percent |
|--|-------------|
| Hired directly out of a training program | |
| Hired away from another carrier | |
| Hired away from other sectors | |
| Previously unemployed | |
| Other (specify): | |
| Total | 100% |

1a. (if training identified) **From what types of training programs do you most commonly hire people?** _____

2. **With respect to the positions we have talked about today, what types of training does your company offer?**

- a. _____ Do not offer support/training
- b. _____ General orientation to company
- c. _____ Mentoring for new drivers
- d. _____ Handling of hazardous materials
- e. _____ Safety training
- f. _____ Technical training (_____)
_____)
- g. _____ Other (_____)
- h. _____ Not sure

Comments: _____

3. **What do you see as the greatest needs for improvement in the training programs which serve the trucking industry?** _____

4. **Do you have any final comments or recommendations regarding human resource issues or strategies in the trucking industry?** _____

THANK YOU FOR YOUR PARTICIPATION