

TRUCK DRIVING

Demand Analysis
2021



MINNESOTA STATE
Transportation Center of Excellence



**Developed for the Minnesota State
Transportation Center of Excellence
by RealTime Talent**

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Introduction and Sector Overview

This report highlights the importance of the Truck Driving career pathway for Minnesota’s Transportation Industry. Professionals in these careers work as heavy truck drivers, tractor drivers, bus drivers, sales truck drivers, and tank car drivers serving a variety of industries. In all, about 95,261 people work in Truck Driving roles in Minnesota as of the second quarter of 2021—a -4.0% decrease (-3,961 workers) from a year prior.

Overall employment in Minnesota has declined by nearly -92,000 workers (-3.1%) between the second quarter of 2020 and 2021, and the five-year forecast dropped from 49,053 expansion of employment over five years to just 31,051 from 2021 through 2026 as of the most current baseline forecasts, or about 0.2% average annual growth. An optimistic forecast assuming reduction in labor force exits, economic conditions improving, and lessening impacts of COVID-19 on key industries forecasts up to 1.2% average annual growth over the next five years, or a total of 172,340 people newly employed by 2026. During this time frame, Truck Driving employment is anticipated to rise respectably in Minnesota by about 1,293 total jobs (0.3% annually) due to a tight talent pool, but could grow by about 6,179 (1.3% on average annually) in an optimistic forecast model. Total baseline demand for Truck Driving talent is anticipated to be around 57,082 professionals needed to fill positions due to job exits and transfers, such as retirements and job changes.

Transportation Pathways in Minnesota – Baseline Forecast, 2021Q2¹

Occupation	Current						5-Year History		5-Year Baseline Forecast				
	Empl	Avg Ann Wages ²	LQ	Unempl	Unempl Rate	Online Job Ads ³	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
Automotive Technology Pathway	21,614	\$61,300	1.03	753	3.4%	1,263	163	0.2%	8,991	2,619	6,697	-324	-0.3%
Aviation Pathway*	8,773	\$122,300	0.88	346	3.9%	210	-674	-1.5%	3,844	1,121	2,688	35	0.1%
Collision Repair Pathway	6,864	\$46,900	1.14	324	4.6%	376	-307	-0.9%	3,524	1,042	2,480	2	0.0%
Diesel Equipment and Truck Pathway	12,889	\$56,000	1.20	344	2.7%	487	-451	-0.7%	6,292	1,919	4,383	-10	0.0%
Marine and Power Sports Pathway	5,181	\$41,900	1.07	373	6.8%	58	80	0.3%	3,109	963	2,131	15	0.1%
Truck Driving Pathway	95,261	\$44,600	0.96	6,493	6.60%	8,796	-843	-0.2%	57,082	22,543	33,247	1,293	0.3%
Transportation Occupations	147,533	\$51,600	0.99	8,573	5.6%	11,284	-1,891	-0.3%	81,732	29,859	50,858	1,015	0.1%
Total - All Occupations	2,920,850	\$58,900	1.00	145,886	4.9%	181,745	-83,089	-0.6%	1,672,986	625,772	1,016,164	31,051	0.2%

*This pathway includes Drone Technology careers as of 2021, which were not included in the 2020 estimates of career pathway employment or demand.

Source: [JobsEQ®](#)

Data as of 2021Q2 unless noted otherwise

Note: Figures may not sum due to rounding.

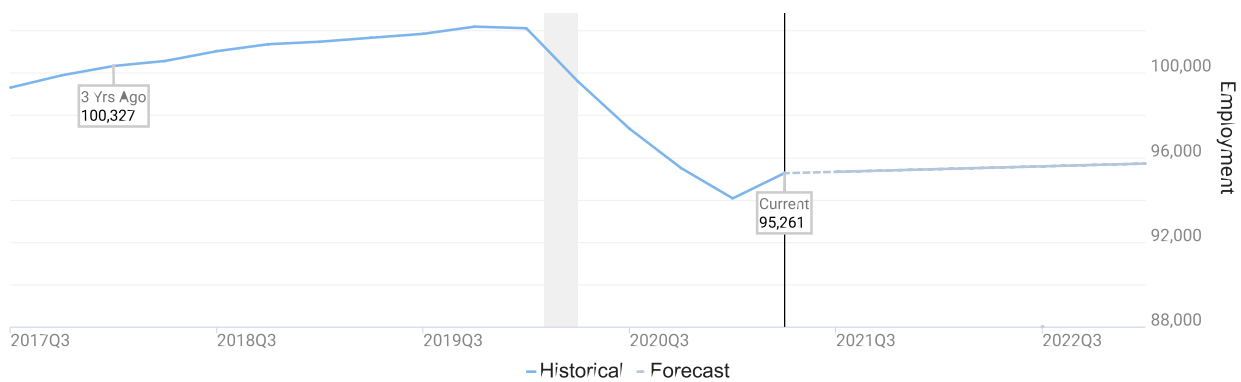
1. Data based on a four-quarter moving average unless noted otherwise.

2. Wage data are as of 2020 and represent the average for all Covered Employment

3. Data represent found online ads active within the last thirty days in the selected region; data represents a sampling rather than the complete universe of postings. Ads lacking zip code information but designating a place (city, town, etc.) may be assigned to the zip code with greatest employment in that place for queries in this analytic. Due to alternative county-assignment algorithms, ad counts in this analytic may not match that shown in RTI (nor in the popup window ad list).

As Minnesota’s economy continues to sustain loss of workers due to the pandemic and overall talent shortage, and with unknown ongoing impacts of the COVID-19 pandemic on our economy and public health, employment forecasts are changing rapidly. Supply chain impacts, the drive to automation and technological innovation mean that the transportation industry, in particular, may look very different in five years from what it looks like today. The compounding impacts of a tight labor market prior to the start of the pandemic and significant, rapid layoffs of non-essential workers across service industry positions creates a complex landscape of employer demand and an available workforce. Forecasting future needs under current conditions with an eye to anticipated talent pipelines into Truck Driving roles suggest that there may be long-term shortages of talent in several critical occupations in this career pathway unless more talent decides to enter the field. The pathway forecast has soured since estimates in late 2020, with a baseline forecast of only 0.3% average annual growth in employment by the second quarter of 2026 as compared to 0.6% estimated one year ago.

Truck Driving Employment Forecast Under Baseline Scenario, Minnesota



Industry/Occupation Mix

Truck Driving talent is primarily concentrated in the General Freight Trucking industry (15.7%, up 0.8 percentage points) and School and Employee Bus Transportation (7.4%, down 1.6 percentage points). The industry demand for Truck Driving talent is diverse, from warehousing to restaurant and grocery industry needs.

Top Industry Distribution for Automotive Technology Pathway Occupations in Minnesota

NAICS Code	Industry Title	CURRENT			5-YEAR DEMAND				
		% of Occ Empl	Empl	Avg Ann Wages	Exits	Transfers	Empl Growth	Total Demand	
4841	General Freight Trucking	15.7%	14,916	\$50,400	2,979	5,347	-295	8,032	
4854	School and Employee Bus Transportation	7.4%	7,040	\$41,500	2,535	1,802	93	4,430	
4921	Couriers and Express Delivery Services	5.6%	5,311	\$60,100	1,133	2,025	251	3,409	
4842	Specialized Freight Trucking	5.0%	4,751	\$50,300	963	1,731	-16	2,679	
7225	Restaurants and Other Eating Places	3.9%	3,746	\$27,000	776	1,378	31	2,185	
4244	Grocery and Related Product Merchant Wholesalers	3.6%	3,404	\$41,900	685	1,271	36	1,992	
6111	Elementary and Secondary Schools	3.2%	3,037	\$38,600	1,053	771	-29	1,795	
4931	Warehousing and Storage	3.0%	2,903	\$48,800	514	1,215	158	1,887	
4853	Taxi and Limousine Service	2.5%	2,372	\$33,800	906	658	213	1,777	
4543	Direct Selling Establishments	2.1%	2,048	\$43,800	401	716	-93	1,024	
4922	Local Messengers and Local Delivery	2.1%	2,026	\$43,700	504	898	446	1,849	
4859	Other Transit and Ground Passenger Transportation	2.1%	2,015	\$36,400	810	570	241	1,620	
4851	Urban Transit Systems	2.0%	1,946	\$44,800	756	489	32	1,277	
5613	Employment Services	1.8%	1,727	\$42,000	307	685	24	1,016	
9211	Executive, Legislative, and Other General Government Support	1.5%	1,413	\$42,900	489	389	25	904	
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	1.5%	1,403	\$47,100	272	498	-54	715	
2373	Highway, Street, and Bridge Construction	1.4%	1,330	\$52,200	274	495	23	792	
5621	Waste Collection	1.3%	1,243	\$49,900	269	487	90	846	
4413	Automotive Parts, Accessories, and Tire Stores	1.1%	1,069	\$28,300	219	392	5	616	
2389	Other Specialty Trade Contractors	1.1%	1,050	\$50,700	217	391	21	630	
n/a	All Others	32.0%	30,513	n/a	6,454	11,001	-91	17,364	

Source: JobsEQ®
 Data as of 2021Q2 except wages which are as of 2020. Note that occupation-by-industry wages represent adjusted national data and may not be consistent with regional, all-industry occupation wages shown elsewhere in JobsEQ.
 Note: Figures may not sum due to rounding.

Pathway Detail

Of all occupations found in the Truck Driving pathway, Passenger Vehicle Drivers are uniquely concentrated in Minnesota to a higher degree than seen in the nation overall. On average, Automotive Technology careers pay about \$44,600 per year (up from \$43,000 last year)—about \$14,300 below the average wage statewide across all positions.

Truck Driving Pathway in Minnesota – Baseline Forecast, 2021Q2¹

SOC	Occupation	Current						1-Year History		5-Year Baseline Forecast				
		Empl	Avg Ann Wages ²	LQ	Unempl	Unempl Rate	Online Job Ads ³	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
53-3032	Heavy and Tractor-Trailer Truck Drivers	37,222	\$51,000	0.98	1,579	4.2%	3,946	-358	-1.0%	21,000	7,592	13,518	-111	-0.1%
53-3033	Light Truck Drivers	17,922	\$42,800	0.87	743	4.1%	1,373	-291	-1.6%	11,036	3,773	6,718	545	0.6%
53-3058	Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity	16,650	\$38,500	1.17	2,826	14.8%	1,111	-2,598	-13.5%	11,094	6,102	4,363	629	0.7%
53-7051	Industrial Truck and Tractor Operators	10,231	\$46,000	0.78	609	5.8%	324	-223	-2.1%	5,876	1,542	4,265	70	0.1%
53-3031	Driver/Sales Workers	8,930	\$31,300	1.00	385	4.3%	2,210	-333	-3.6%	5,155	1,840	3,276	39	0.1%
53-3052	Bus Drivers, Transit and Intercity	4,119	\$44,100	1.02	345	7.9%	34	-531	-11.4%	2,813	1,650	1,036	127	0.6%
53-7121	Tank Car, Truck, and Ship Loaders	188	\$45,100	0.72	6	3.0%	10	-1	-0.7%	109	44	71	-6	-0.6%
Truck Driving Pathway		95,261	\$44,600	0.96	6,493	6.6%	8,796	-4,335	-4.4%	57,082	22,543	33,247	1,293	0.3%
Total - All Occupations		2,920,850	\$58,900	1.00	145,886	4.9%	181,745	-91,909	-3.1%	1,672,986	625,772	1,016,164	31,051	0.2%

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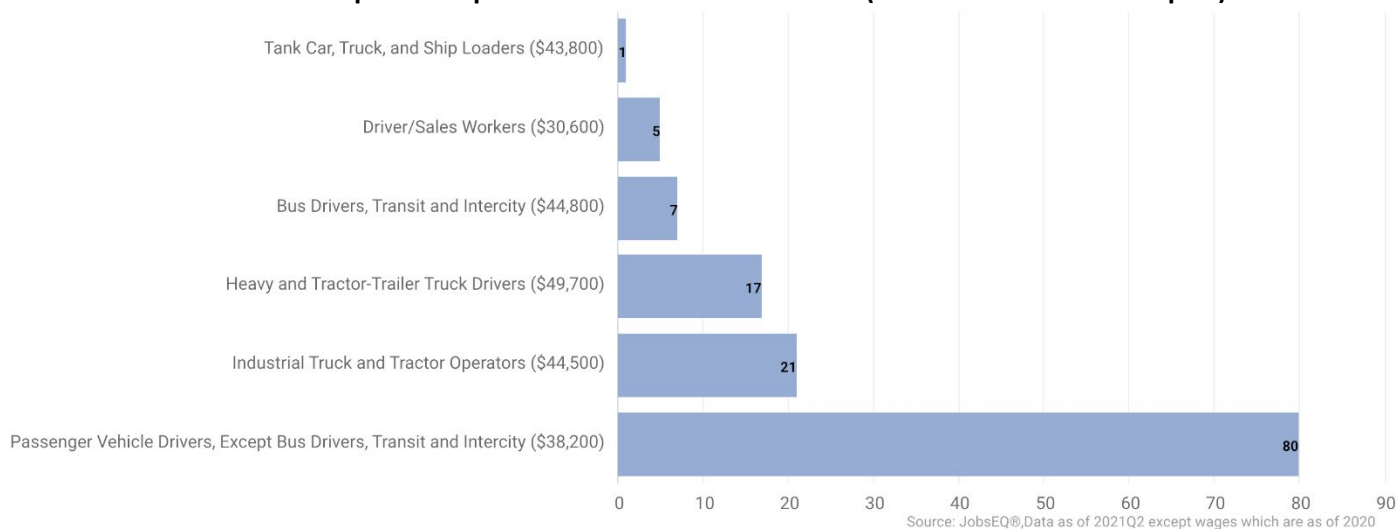
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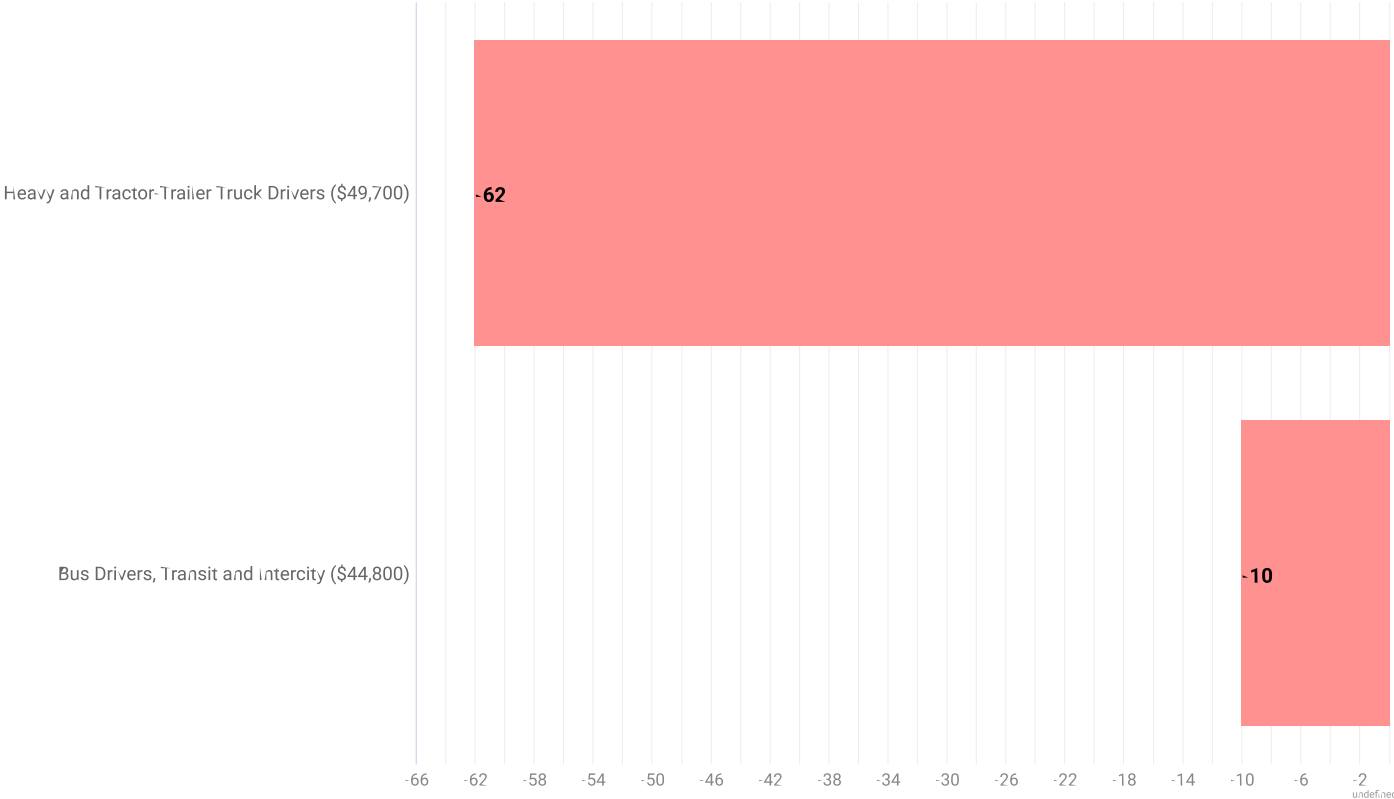
By 2026, no occupations in the Truck Driving pathway are forecast to have critical talent shortages in the short-term, with all occupations having an estimated statewide talent supply that is sufficient or slightly greater than the employer demand for these roles. However, the location of talent in relation to opportunities available may not be fully aligned.

Estimated Occupation Gaps over Five Years in Minnesota (blue indicates talent surplus)



Looking out the next ten years, two occupations in the Truck Driving pathway are anticipated to experience talent shortages. The shortage of Heavy and Tractor-Trailer Truck Drives has improved moderately from estimates in 2020, while shortages of Transit and Inter-City Bus Drivers has increased moderately.

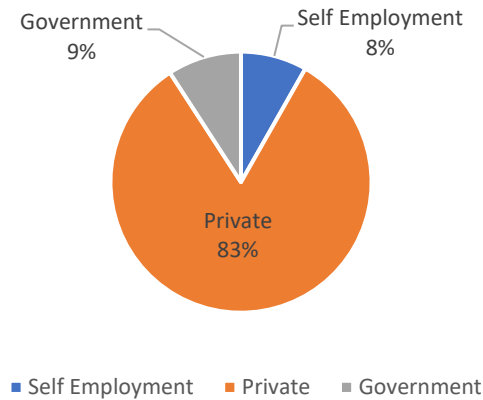
Estimated Occupation Gaps over Ten Years in Minnesota (red indicates talent shortage)



Employment Types

About 83% of people employed in Truck Driving roles in Minnesota work for private employers, while an estimated 8% are self-employed (a slight increase from 6% in 2020). The remaining 9% work for state, federal, or local government entities.

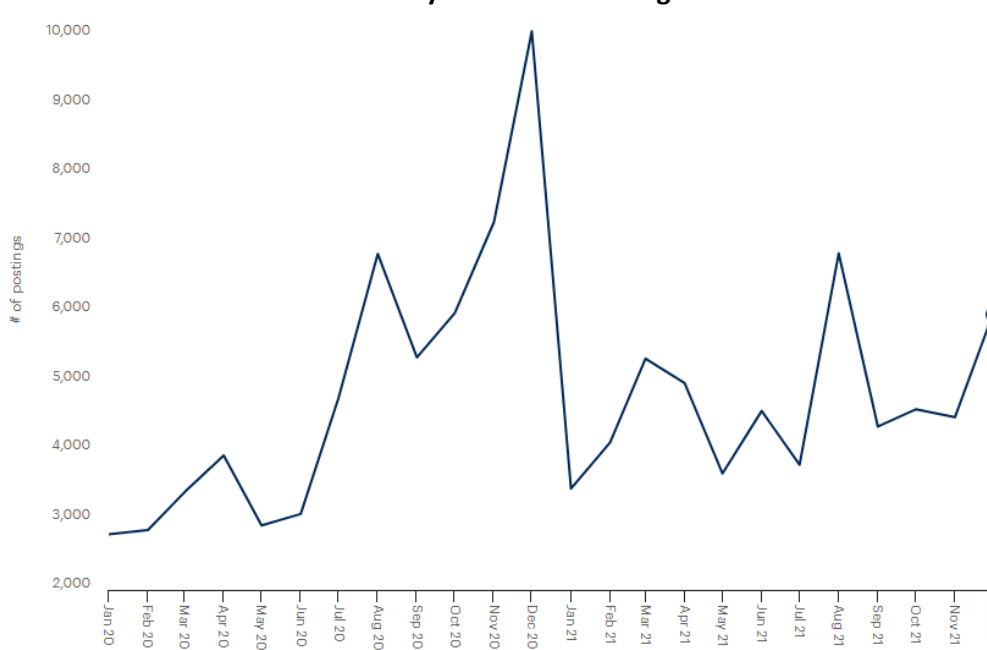
Employment Types, Minnesota 2021Q2



Job Posting Trends

Data in this section focuses on jobs newly advertised between January 1 and December 31, 2021 in Truck Driving roles across Minnesota. All data in this section comes from Gartner TalentNeuron. Overall, there were 56,395 new jobs advertised in Truck Driving roles during this time frame, a decrease of -5% from the prior 12-month period (2020). Volume of posted positions advertised by staffing and temp agencies in the Truck Driving pathway has remained consistent to trends in 2019 and 2020.

Volume of Career Pathway Online Job Postings in 2020 and 2021



Top Employers by Volume of New Job Postings in 2021, With Change from Prior Year

	Employer	Percent Change between 2020 and 2021
1.	YRC Worldwide Inc.	313%
2.	C.R. England. Inc.	11%
3.	Hogan Transports	82%
4.	U.S. Xpress	-65%
5.	goPuff	296%
6.	Koch Trucking	-14%
7.	Shipt	-67%
8.	Amazon	28%
9.	Carvana	7,680%
10.	Dart Transit	-7%

New Job Postings Advertised in Minnesota by Employer Type



Top Skills by Volume of New Job Postings, With Change from Prior Year

1. Dedication (+9%)
2. Lifting (+7%)
3. Communication (+5%)
4. Courtesy (+4%)
5. Relationship-Building (+4%)

Top Knowledge Areas, Tools, and Tech by Volume of New Job Postings, With Change from Prior Year

1. Tractor-Trailers (+18%)
2. Scooters (+13%)
3. Customer Service (+10%)
4. Straight Trucks (+6%)
5. Forklifts (+5%)

Top Certifications by Volume of New Job Postings, With Change from Prior Year

1. Class A Commercial Driver's License (+58%)
2. Class D Driver's License (+42%)
3. HAZMAT (+12%)
4. DOT Medical Card (+8%)
5. Class B Commercial Driver's License (+6%)

Supply

This supply section is a new addition to the 2021 Demand Analysis. This data provides insight on the number of graduates Minnesota is training to fill the workforce. The data below is from CAREERwise and has been put together by the Minnesota State Transportation Center of Excellence.

Truck Driving Program Completers by Degree Level in Minnesota 2019			
CIP Code	Program Title	Cert1	Total
49.0205	Truck and Bus Driver/Commercial Vehicle Operator and Instructor	131	131
		Total	131

Cert1 = Postsecondary award, certificate, or diploma of (less than 1 academic year)

Cert2 = Postsecondary award, certificate, or diploma of (at least 1 but less than 2 academic years)

Assc = Associate's degree

Assc+ = Postsecondary award, certificate, or diploma of (at least 2 but less than 4 academic years)

Bach = Bachelor's degree or equivalent

FAQ

What is a location quotient?

A location quotient (LQ) is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

What is a cluster?

A cluster is a geographic concentration of interrelated industries or occupations. If a regional cluster has a location quotient of 1.25 or greater, the region is considered to possess a competitive advantage in that cluster.

What is separation demand?

Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. The total projected demand for an occupation is the sum of the separation demand and the growth demand (which is the increase or decrease of jobs in an occupation expected due to expansion or contraction of the overall number of jobs in that occupation).

What is the difference between industry wages and occupation wages?

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.

What is NAICS?

The North American Industry Classification System (NAICS) is used to classify business establishments according to the type of economic activity. The NAICS Code comprises six levels, from the “all industry” level to the 6-digit level. The first two digits define the top level category, known as the “sector,” which is the level examined in this report.

What is SOC?

The Standard Occupational Classification system (SOC) is used to classify workers into occupational categories. All workers are classified into one of over 804 occupations according to their occupational definition. To facilitate classification, occupations are combined to form 22 major groups, 95 minor groups, and 452 occupation groups. Each occupation group includes detailed occupations requiring similar job duties, skills, education, or experience.

Who created this report?

This report was developed by RealTime Talent for the Transportation Center of Excellence. If you have questions about the data found in this report, or are interested in learning more, please contact Director of Strategic Research Erin Olson at erin@realtimentalentmn.org or visit the RealTime Talent website at www.realtimentalent.org