INDUSTRY PROFILE - Postal

Transport, Postal & Warehousing
Postal and Courier Pick-up and Delivery Services

ANZSIC: 5101

Report Prepared April 2023

LOGISTICS & DEFENCE SKILLS COUNCIL

Contents

1. Background

1.1 Industry Regulatory / Licencing Bodies

- Australia Post is a government-owned business (under the Department of Communications and the Arts) and is governed under the *Australian Postal Corporation Act 1989.*
- The Australian Competition and Consumer Commission (ACCC) is the body responsible for the regulation of Australia Post as identified under the *Australian Postal Corporation Regulations 1996*. In particular, the ACCC assesses notifications relating to any price increases, disputes regarding the terms and conditions of Australia Post, and the record-keeping rules for Australia Post.

2. Workforce Opportunities and/or Challenges for Industry

Please note this response relates to the Postal Industry. Other sectors within the Transport, Postal and Warehousing sectors (I.e. Aviation, Maritime, Road Transport and Warehousing and Logistics) have been completed individually, please refer to those for more information. Where an answer cannot be provided here (i.e. due to the many varied licencing, experiential or qualification requirements of industry) please refer to specific occupational responses for further clarification; or contact the LDSC for more information.

2.1 Industry Overview

Australia Post:

- Australia Post reports the postal delivery service company's half year results show profits have declined by 88.2%. Changing customer behaviours are impacting Australia's Post retail network, with continuing digitisation resulting in declining retail transactions at Post Offices. Australia Post will report a full year loss this year for the first time since 2015 (and despite reporting a record revenue for the FY 2022). Cost increases, driven by wages growth, severe weather events and labour shortages also impacted the profitability of the business. Australia Post absorbed the majority of costs associated with force majeure events. Although this was initially offset by rising parcel volumes and eCommerce activity due to COVID-19, this has now abated. Revenue from letters continued to decline, falling 5.7 per cent compared to 2022, despite the benefit of a few one-off mail outs, including state election materials, cyber-attack and interest rate notifications. Revenue form letters now makes up just 18.8 per cent of total Australia Post revenue, down from 19.5 per cent in 2022. Operational costs during the half increased 1.2 per cent from the same period last year to $4.64 billion, due in part to severe weather events, rail network disruptions and a 6.1 per cent wage increase granted to EBA team members, effective this half.
- While operational costs remained elevated throughout the half, Australia Post invested $208.2 million in new facilities, fleet and technologies to better deliver for customers. This included the new Perth Parcel Facility (Boorna Wangkiny Mia), which was officially opened in December 2022 as well as investing in an additional 65,000 (Unit Load Device) or ULDs for Peak preparedness to help our customers during their busiest time (Christmas and Black Friday which saw over 650,000 parcels come through the facility). The new facility in Perth will reduce manual handling and improve parcel delivery with faster scanning and processing. The facility is expected to process over 200,000 parcels per day during peak periods.

Couriers Please:

- Couriers Please has also reported a 15% increase YoY in parcel deliveries since March 2020, with a 30% increase in WA over the Christmas peak period, with State manager forecasting exponential growth for the next two years. This will continue to see the rise in demand for those related occupations in this are such as Courier Drivers, as e-tailers look for more ways to provide and expand delivery options to their customers.

Fed Ex:

- In Australia, FedEx began operations in 1989, and now employs more than 5600 team members across an extensive national domestic network with the ability to deliver to every address in the country. The company has more than 2400 vehicles nationally and operates multiple flights in and out of Australia. In October 2021, FedEx Express Australia announced additional weekly flights from Singapore to Sydney, Australia, doubling flight operations between the two countries. Australia is currently Singapore's fourth-largest trading partner for exports, while Singapore is Australia's largest two-way trading partner. FedEx Express Australia shipment volume in Singapore increased 22 per cent during FY 2022.

2.2 Industry opportunities

The below trends will impact on Industry requirements and future workforce needs for this sector.

Rise of E-Tailers / E-commerce Growth

- There continues to be increases in online shopping with a record 9.3 million Australians buying online, growing online purchases by 12% when compared to last year. The growth in online shopping has exceeded forecasts throughout the pandemic with more than 900 million parcels delivered. Australia Post reports more than 5 million households regularly use online shopping each month, resulting in the need for Australia post to increase network capacity, invest in new facilities, fleet, and technologies to create a sustainable network for the future. Although the postal workforce have been increased due to seasonal fluctuations (i.e. Christmas) this time last year Australia Post recruited 4000 seasonal workers, compared to 6000 workers required this year. Industry Stakeholders suggest that some of these recruits found permanent roles with Australia Post, though it is unclear how many.
- The latest e-commerce trend report indicates Australian SMEs are using e-commerce more and agree the pandemic-driven utilisation of e-commerce is permanent. Global e-commerce sales are expected to grow to $7.4 billion by 2025, more than double since 2018, leading to increased last-mile logistics complexity and heightened consumer expectations.
- It notes eight in 10 SMEs believe e-commerce will become more important in their business over the next three years, with nine in 10 SMEs believing they are well positioned to capitalise on this growth. Seventy-seven per cent agree e-commerce will continue to become even more important in the future.
- According to preliminary results published by International Post Corporation (IPC), postal operators worldwide saw revenue increase by 3.8% on average in 2021 up from 1.4% in 2020. As the pandemic evolved throughout the year, postal industry growth was driven by strong demand for B2C e-commerce logistics as posts delivered more packets and parcels to online shoppers across the globe.
- Following the surge in e-commerce as the pandemic struck in 2020, parcels growth continued in 2021 with some posts reporting that volumes rose by more than a third compared to the prior year.

Innovative Changes: Australia Post Offices

- In a bid to remain viable and relevant to both businesses and customers, Australia Post stores may soon be fitted out with change rooms allowing customers to try on their online purchases, as the company prepares to open a new concept store later this year. The pilot store will be based on the East Coast but if successful this will be expanded to other stores, and likely to WA. This may have a flow on affect to the duties and responsibilities of customer service personnel who may need to deal with an increase in return logistics. This may also see an increase in the workers required to fulfil this role. See Retail Industry Profile for more detail.
- Australia Post and Westpac Group sign new 10-year Bank@Post agreement. The 10-year agreement allows Australia Post to continue to provide essential Bank@Post services to Westpac Group customers, which is particularly important for personal and small business customers in rural and regional areas.

International and Regional Mail Trends

- The Australian Government and Australia Post announced a new Pacific Postal Development Partnership to strengthen postal services in the Pacific by signing a joint declaration with the Universal Postal Union (UPU) and Asian-Pacific Postal Union (APPU). This will benefit consumers and businesses, including the estimated 200,000 people living in Australia with Pacific Island heritage. To support the three-year partnership, the Government has provided Australia Post with a $450,000 contribution to target improvements to postal systems, processes, technology and training in the region. The first activities were expected to commence end of 2022.

- FedEx Express ANZ has partnered with Starshipit, a shipping and fulfilment platform, supporting small and medium enterprises (SMEs), which allows e-tailers to tap into the international e-commerce market. E-commerce research shows that e-tailers are increasingly looking to strengthen their delivery capabilities and allow them to grow their exports by tapping more international customers. The partnership will allow for enhanced shipping and fulfilment automation, with access to a premium delivery experience for their customers at competitive rates.
- Both the WA and the federal governments are funding a subsidy scheme to reduce freight costs for businesses impacted by floods in Kimberley. Freight businesses in Kimberley can receive the subsidy if they've been impacted by recent floods. The funding will be shared through the Commonwealth-State Disaster Recovery Funding Arrangements (DRFA). The new scheme, which will be backdated to January 1, 2023, will apply to the freight of essential supplies for businesses, not-for-profits and Aboriginal corporations in and out of the Kimberley, including transport of agricultural products out of the region.

Impact on Air Freight (Russia/Ukraine War)

- There is an impact on flight movement of goods for surrounding areas such as Asia-pacific to Europe, including Australia. In some instances, this has added more than 1000 nautical miles. This has increased lead times, costs, and flight times, with aircraft operators no longer getting the same turnaround times which has added further capacity constraints to air freight.

Rising Sea Freight Costs

- The Australian Financial Review (AFR) says freight and shipping costs for consumer goods are expected to stay as low as possible in 2023 as global trade bounces back this year. The Freight Trade Alliance says spot prices for freight from China to Australia is a major indicator that declining volumes are helping lower prices, with trends expected to continue into 2023. This should help offset some costs for freight networks and the supply chain.

2.3 Supply and Demand for Workforce

- There is greater demand for Courier and Delivery Drivers, as retail networks continue to grow and expand their service delivery options for same day delivery or to compete (and lower costs associated) with other providers offering similar services (i.e. UberEats). On the East Coast, McDonalds have recently announced a trial which will see the fast-food retailer add an in-house delivery option to their offerings. It is unclear if this service will be offered by specific drivers hired for this purpose; or if team members will be required to take on the duties of a delivery driver in addition to their other roles (i.e. cashier/front end or counter staff). Currently, Red Rooster in WA has been offering similar services through their website, and through the Menulog app – with a vehicle provided and cashiers freed to deliver as and when required. Services such as this will offer direct competition with UberEats, and Menulog, and will increase the demand for drivers with these skills. As these programs expand, this could benefit industry as these type of delivery roles could be seen as entry-level to gain some of the skills and experience needed for delivery or courier driver roles (such as familiarity with route planning, fatigue management, safe food handling, Infection Control). However, the amount and type of experience gained may still be limited in transferability for courier type roles, with inhouse training still required to bring them up to speed in the handling of different freight, load/unload etc issues. Additionally, skill sets to train workers to take on delivery duties may be required on a greater scale for these workers.
- Personal shoppers and workers in Dark stores may both need to be evaluated for how they best fit in the ANZSCO framework, or if a new coding is appropriate, given the crossover between retail and supply chain roles.
- The postal industry continued to sustain growth in 2020 despite accelerating mail volume declines. As demand for e-commerce delivery remains strong, preliminary results for 2021 show that posts continue to benefit from higher packet and parcel volumes". COVID-19 has been shown to accelerate the decline in letter volumes, however with parcel volumes are continuing to grow. In the metropolitan area many depots have outgrown their space, with one employer stating they had already outgrown the newly developed warehouse due to the volume of deliveries and can only

expand again once a new site is found and developed, as existing warehouses do not offer the capacity for these volumes.

2.4 Technology

- In the 2022 Inside Australian Online Shopping Report, more than 4 in five households shopped online during 2021. National growth in online purchases was up 12.3% compares to 2020 and almost double the pre-pandemic level. Industry reports the fundamental shift in e-commerce brought by the pandemic in the way we live, work and shop has irrevocably impacted online shopping with high levels expected to stay. Although inflation and the cost of living may moderate some spending the rates seen will likely continue to occur. This has not only changed the warehousing and retail landscape but will continue to impact transport operators, as customers continue to look for reliability and delivery options in making their e-tailer choices, increasing the number of e-tailers they buy from. For instance, in 2019 the average consumer bought from 9 individual retailers, in 2021 that number rose to 15. As a result Australia Post has invested more than $400M in increasing its facilities, technology, fleet and workforce to keep up with demand. Australia Post today released its 2023 Inside Australian Online Shopping Report, which according to the data, 9.4 million Australian households shopped online in 2022, spending $63.8 billion on online goods, meaning online shopping now makes up over 18 per cent of all retail sales.
- This year, the majority of spending was on home and garden ($18.7 billion), a category which traditionally has more expensive items like furniture and electronic goods. However, the overall growth was driven by increased spend on food and liquor stores ($13.1 billion with YoY growth of 11.4 per cent growth), as well as variety stores ($11.6 billion with YoY growth of 8.6 per cent). This directly links to the growing freight task, and the growing requirement for more delivery and freight (truck) drivers to deliver these goods; as well as warehouses to store goods.
- The area of AI and it's impact on the assessment practices will need to be monitored. ChatGPT is a chatbot launched by OpenAI in November 2022 and has the ability to generate human-like text, making it capable of using natural language conversations. Due to this ChatGPT is having an impact on the Assessment space both at secondary schools and for those offering online learning in determining the authenticity of individuals work for assessment who may be using the AI to submit work not of their own making. Schools are looking for ways to mitigate these effects, with some planning to return to paper and pencil based assessments conducted in the classroom to ensure they are accurately assessing individuals understanding of concepts in their submitted work. This trend will need to be monitored to see how/if it affects the VET area. Within the UK they have also recognised the potential for students utilising ChatGPT with permission and if it may create biases in grading, as well as the possibility it could replace human instructors and how this may affect the fair grading and assessment of individuals work. Some National retailers are also investigating it's potential to provide training.
- In addition ChatGPT has also been identified as a possible area to assist in career planning. In particular it can Level up your job searches by targeting opportunities for career moves, assist in elevating résumés, and assist in preparing responses to interview questions. As not everyone has access to career resources this can be a hidden benefit of AI.
- Further there are concerns around the roll-out of such technologies (i.e. ChatGPT) and the lack of consultation, from both from a consumer/public perspective - large companies tend to trial new technologies on their customers without informing them (i.e. Kmart and Bunnings face recognition as an example). This has the potential to impact customers (i.e. customer experience/satisfaction) as well as workers (in regards to understanding how and when to utilise these technologies). These technologies are often introduced into workplaces without consultation with the workforce. The Award states there is a requirement for this to occur however, industry feedback has been that this is rarely enforced. Further this area will need to be monitored to ensure that workers gain the requisite skills to understand, interact with or use this technology. As well as to understand their rights if used in the workplace from an industrial relations perspective.

3.Environmental, Social and Corporate Governance (ESG)

- Interestingly DHL Express has launched GoGreen Polus, the first global express courier to give customers the opportunity to use sustainable aviation fuel to reduce emissions associated with their shipments. This will launch first in the UK, shortly followed by Italy, Denmark, Sweden, Canada, Australia, South Africa, and the United Arab Emirates. It is unclear at this time, how this may affect air freight costs.
- Australia Post has taken delivery of its first Volvo electric vehicle, as the parcel logistics giant continues its sustainability drive. Part of a six-month trial, the Electric FL utilises four batteries to achieve an energy capacity of 266 kWh. This will need to be monitored as training and upskilling will need to be available for those interacting with this infrastructure.
- Further expansions are also being seen from other courier networks such as DHL which recently acquired the Glen Cameron Group (a national logistics company specialising in road freight and contact logistics) making DHL one of the largest logistics companies in Australia. The new fleet will add more than 100 trucks and trainers and has more than 830 employees operating within Australia to DHLs network. This will allow DHL to strengthen its service offerings across four areas: Domestic Nationwide General Freight, Domestic Nationwide Express, Specialised Services and Contract Logistics Transport. DHL operates globally in more than 200 countries, with global forwarding expertise in air, ocean and road freight.
- Retail has increased and accelerated its reliance on e-commerce and as a result are recognising the value of automation to complement their existing workforce. E-shoppers increased by 112% between 2019-21 alone! Robotics, software, AI, machine learning is continuing to influence the retail, postal and warehsouto9ing landscapes. Companies now are realising that rather than an entire system overhaul, agile automation (using automation solutions or components of automation) is more useful for relieving bottlenecks, with less cost and disruption to the existing workforce. For instance, Booktopia is using robots to improve fulfilment and put away rates at is national DC. These technologies, such as plug and play options, are enabling both e-commerce and bricks and mortar retailers to access these advances.

4. Training and Education Needs

4.1 Current and Anticipated Training Needs

- TLI20119 Certificate II in Logistics and TLI30319 Certificate III in Supply Chain Operations are available to employers within the Postal industry.
- Typically, formal qualifications are not required at the lower levels for postal workers so this training is not actively sought or needed for these roles. The postal sector makes use of a combination of in-house training and other related supply chain qualifications to train and upskill their workforce.
- There is a need for industry, manufacturers and training providers to partner together to ensure the technology and skills needed for workers is supplied. This training needs to go beyond the “how to use” the equipment (which the manufacturers often provide) and extend to provide insight into the supply chain and how the technology and their organisation fits into the overall picture. This is particularly important to upskill any individuals who may go on to fill the more senior roles.
- Industry continues to support the use of skill sets (micro-credentialing) as a faster means of equipping workers with the relevant skills as job roles change due to policy or technology/innovation developments and thus can lead to employment outcomes.
- For driving related occupations (i.e. Courier or Delivery Driver), a ‘C’ Class licence is required. Employers may look favourably at those with a certificate II or III in driving operations, however formal qualifications are not required, with training provided in house. The Certificate II in Terminal Operations is an alternative approach to non-licensed pathways to the road transport

sector and industry is investigating how best to utilise this approach.[i] This could be a suitable pathway for those wishing to establish a long term career in road transport with the option to progress to larger vehicles by first undertaking Courier and Postal Delivery Officer roles.
- Industry looks favourably at those with Customer Service Skills sets as these workers can interact with the public when making deliveries.

4.2 Training Challenges and Opportunities

- Any delays in the licensing and practical driving assessment can also create delays and bottlenecks for students wishing to attain the higher licences, this may have impact on other transport roles. This is concerning, as these roles already have significant time delays imposed on attaining these licences, and any additional bottlenecks may impact negatively on industry strategies to attract a younger cohort to driving roles.
- One of the issues identified by the LDSC through industry consultations and as part of our engagement into the Parliamentary Enquiry into VET perceptions and other training products (i.e. the Heavy Vehicle Driver Apprenticeship); is that employers are not able to easily navigate or find training products or training providers. This has limited their ability to engage with the VET system, with some employers commenting that the VET products exist already, employers just don't know how to make use of them. Strategies to engage employers and to develop this knowledge, some of these include:
    - Exploring the school-based pathway into industry (at year 12 and post year 12) and identifying what these job roles may look like for younger entrants prior to attaining some of the licences (due to age restrictions).
    - Working with VET Coordinators, Employment Service Providers (through DEWR) and Careers Advisors to raise the profile of transport and logistics careers through an industry tour day. Such a day would seek to identify the breadth and variety of roles, career pathway progressions of school leavers, job seekers etc, and the associated training/licences needed to enter industry at these various points.
    - An employer forum to create better links between industry employers and high schools, migrants, refugees, veterans and women and other under-represented groups to foster employment pathways into industries.

- There continues to be high interest by industry to employ veterans into TLI roles with industry anticipating the outcome of skills mapping project/s currently underway.

4.3 Career Pathways and Graduate Outcomes

- Although there appears to be an adequate workforce at the lower end in the postal services, those with the high-end IT and supply chain management skills are still in high demand and a shortfall is anticipated for these workers. For these workers these skills and experience will be considered essential.

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6. Industry Consultation

Regular industry consultation is undertaken by the LDSC through the Road Transport Industry Advisory Group (IAG), the Registered Training Organisations (RTOs), LDSC Annual RTO Forum, the LDSCs Board of Management (BoM) meetings, regional consultations, participation in industry advisory committees, teleconferences, email and social media and the use of online surveys.

Participation in group and individual meetings varies year on year. Comprising: the Road Transport IAG (41 members; 18 small, 8 medium, 15 large organisations located in the metropolitan and regional areas of WA covering organisations in the freight, passenger, and on-demand transport area); the Furniture Removalist IAG (comprising 10 members of the Furniture Removalist Industry; 4 National, 6 small to medium); the Mobile cranes IAG (14 organisations comprising small medium and large operators in the Metropolitan, Goldfields-Esperance, northwest and southwest regions); the Warehousing and Logistics IAG (comprising 10 members made up of small, medium and large organisations, located predominantly in the Metropolitan area with depots or service provision and facilities in the Southwest and Northwest); and the RTO IAG (we invite 120 RTO Comprising small, medium and large private and public training providers). Please note, Industry union and association members are also invited to provide feedback.

Continued and ongoing contact is made throughout the year via emails, newsletters, surveys (our most recent State of the Industry Survey had 89 industry respondents: across all industries under the LDSC remit. This data has also been included in these responses); and other channels by the LDSC to members and non-members of the Road Transport IAG and RTO IAG networks.

In addition, participating organisations for the Road Transport and the Warehousing and Logistics sector included **many small, medium and large companies** with interests in Freight and passenger transport**,** local Chamber of Commerce and Industries (CCIs)) across WA, **Industry Associations** (i.e. Crane Industry Council of Australia (CICA WA), Australian Furniture Removalists Association (AFRA), the Ride Share Drivers Association of Australia (RSDAA), WA Country Taxi Operators Association, Western Roads Federation (WRF) Transafe WA, Livestock and Regional Transport Association (LRTA), iMove, Freight and Logistics Council WA, Australian Trucking Association; The Chartered Institute of Logistics and Transport (CILTA), Freight and Transport (FT Alliance), and Supply Chain And Logistics Association of Australia (SCLAA)); **Unions** (i.e.. the Transport Workers Union (TWU)); Maritime Union of WA, CFMEU WA, Crane and Industry Council Australia (CICA) the **licensing/regulatory body for Road** (i.e. Main Roads WA, Worksafe WA); **Local and Commonwealth Government Departments** (i.e. the Department of Transport, Department of Infrastructure, Regional Development and Cities, and Defence West, the Western Austrian Defence Industry Workforce Office (WADIWO), Road Safety Commission); and the **WA Industry Training Council Network** and **Registered Training Organisations** (RTOs).