

2019 FREIGHTWAVES & WOMEN IN TRUCKING ASSOCIATION SURVEY

SEPTEMBER 2019

FREIGHTWAVES FREIGHTINTEL RESEARCH





Number of women behind the wheel soars year-over-year

Women now make up over 10 percent of over-the-road (OTR) truck drivers, an increase of almost 30 percent over the 7.89 percent seen in the Women in Trucking (WIT) Association's 2018 survey. The increase came after a industry-wide push to hire more women drivers in response to last year's capacity crunch.

FreightWaves partnered with WIT to complete this year's survey. It was conducted via email to FreightWaves' readers, garnering 884 responses from across the logistics industry. The majority of responses came from carriers and freight brokerages, but shippers and freight tech companies also responded.

While companies were primarily concerned with tapping into new driver segments in order to remedy the driver squeeze last year, the growing push to get women on the road also piqued the interest of researchers. A 2018 study conducted by the American Transportation Research Institute (ATRI) found that women are not only adequate drivers, but that they are safer drivers than men in most cases.

ATRI Vice President Dan Murray commented on the study's findings during the 2018 TrueNorth Transportation Risk Summit. The ATRI study found that men are 88 percent more likely to have a reckless or negligent driving conviction, 78 percent more likely to have a seat belt violation, 73 percent more likely to be convicted of running a stoplight and 70 percent more likely to be convicted of speeding one to 15 miles over the speed limit when compared to women.

The ATRI study's findings have been reinforced by researchers from several other organizations. The data behind hiring women drivers could serve as a driving force to keep carriers on the lookout for qualified women, even now that capacity has loosened up.

The trend is not contained to the driver's seat. The number of women executives in trucking companies climbed just shy of 24 percent year-over-year. This year's survey revealed that women make up one-third of the executive teams at for-hire carriers. When other market segments are added in, women account for at least one in four executives.

Women make up 43.5 percent of the overall non-executive workforce in trucking companies across the board. Non-executive employees include drivers, driver managers, dispatchers, salespeople and administrative workers.



The lowest number of women executives was seen in freight tech companies, where women make up just 19 percent of the executive teams. These companies tend to employ fewer women than all other surveyed portions of the transportation and logistics space, lagging behind in area from salespeople to technology staff.

The only position that came in below drivers, in terms of percentage of women employees, is diesel technician. This year's survey shows that about 4 percent of this field is made up of women, making it the only researched position in transportation where women make up a single-digit percentage of the workforce.



Key Highlights – Women in Trucking Survey

- The role of women as over-the-road (OTR) truck drivers increased to 10.2 percent in 2019. This is a 29.2 percent increase from Women in Trucking's 2018 survey.
- For-hire carriers were by far the largest sample size and women represent over one-third of the executive teams for this group.
- When combining all trucking categories together, 38.1 percent of fleet safety is managed by women.
- While roughly 10 percent of truck drivers are women, only 4 percent of diesel technicians or mechanics are women.
- For non-executive positions in trucking companies, women represent 43.5 percent of the overall workforce.
- 30 percent of executives at non-asset based third-party logistics (3PL)/freight brokerages are executives, which is slightly below trucking companies where it is one-third.
- For shippers without a private fleet, 26.9 percent of the executive team are women. These results rank second-lowest among all trucking and logistics market segments in the survey.
- Only freight tech companies come in lower, where only 19 percent of executives are women, which is almost half the rate of trucking and logistics companies.
- At 16 percent, women represent an even smaller portion of freight tech technology teams.



Table of Contents

- 7.** Women in Trucking Survey Results
- 9.** Women in Trucking Employment Trends – Trucking Companies (For-Hire and Private Fleets)
- 14.** Women in Trucking Employment Trends – 3PL/Freight Brokerages
- 16.** Women in Trucking Employment Trends – Shippers Without a Private Fleet
- 17.** Women in Trucking Employment Trends – Freight Tech
- 19.** About Women in Trucking Association and FreightWaves



List of Figures

- 7.** Figure 1 – Survey Respondents by Market Segment
- 8.** Figure 2 – Carrier Respondents by Fleet Size
- 9.** Figure 3 – Percent of Women Employed as Over-The-Road Drivers
- 10.** Figure 4 – Percent of Women Employed as Executives
- 11.** Figure 5 – Percent of Women Employed as Executives in Safety
- 12.** Figure 6 – Percent of Women Employed as Diesel Technicians/Mechanics
- 13.** Figure 7 – Percent of Women Employed as Non-Manager/Executive
- 14.** Figure 8 – Percent of Women Executives in 3PL/Freight Brokerages
- 15.** Figure 9 – Percent of Women as Freight Brokers/Carrier Sales/Admin roles in 3PL/Freight Brokerages
- 16.** Figure 10 – Percent of Women in Executive Roles at Shippers Without a Private Fleet
- 17.** Figure 11 – Percent of Women in Non-Management Roles at Shippers Without a Private Fleet
- 18.** Figure 12 – Percent of Women Employed in Freight Tech

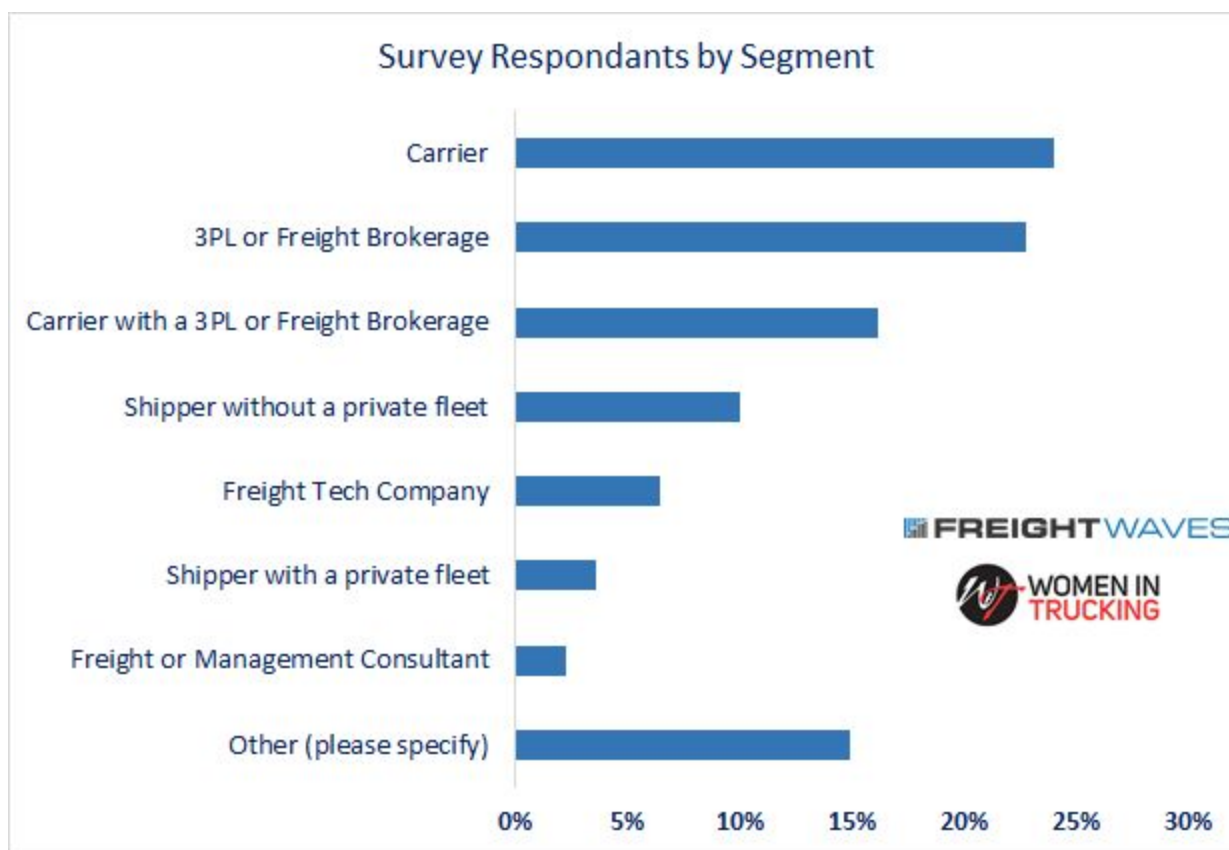


Women in Trucking Survey Results

In September 2019 FreightWaves and the Women in Trucking Association partnered to conduct a survey of the trucking industry to determine the percentage of women drivers, executives and staff employed in the trucking industry.

FreightWaves conducted this survey via email to its readers. There were 884 respondents covering the entire logistics industry. The two largest categories were carriers and third-party logistics (3PL)/freight brokerages. Shippers and freight tech companies also participated in the survey. The demographic breakdown is shown in Figure 1 below.

Figure 1 – Survey Respondents by Market Segment

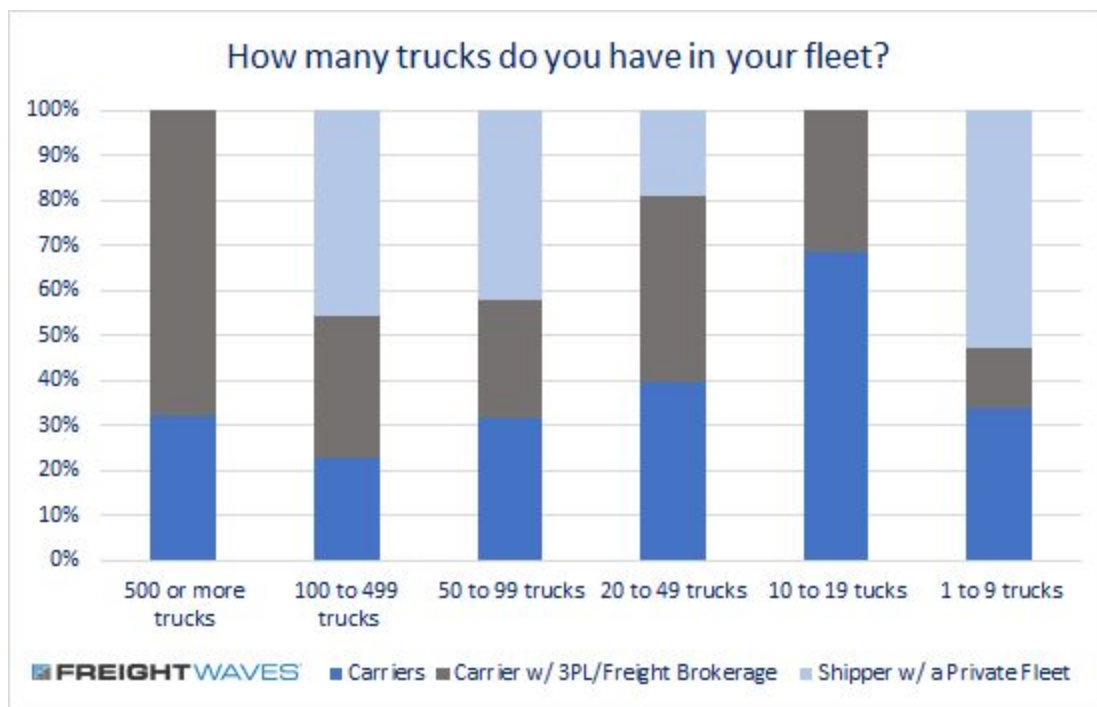


Source: FreightWaves and Women in Trucking Association Survey – September 2019



Carriers survey responses are distributed across all fleet categories. Over half of the carriers who participated in the survey operate fleets of 50 or more trucks.

Figure 2 – Carrier Respondents by Fleet Size



Source: FreightWaves and Women in Trucking Association Survey – September 2019

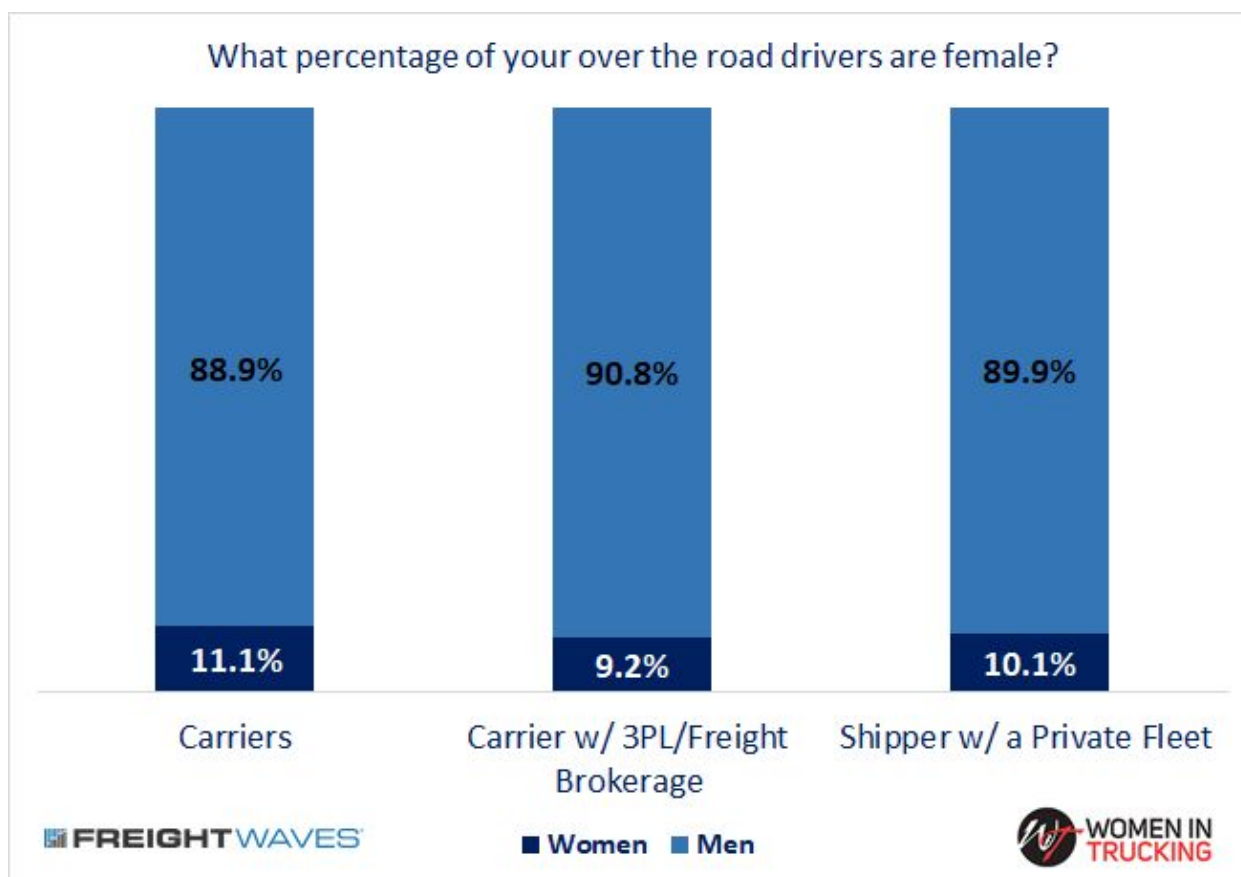
- 54 percent of for-hire or private carriers who responded operate more than 50 trucks.
- The highest fleet category for all carriers were 50 to 99 trucks with 24 percent representation.



Women in Trucking Employment Trends – Trucking Companies

Overall 10.2 percent of over-the-road (OTR) truck drivers are women. This is an increase from 7.13 percent in 2017 and 7.89 percent in 2018 based on previous Women in Trucking surveys. Pure play carriers employ the most women as drivers at 11.2 percent, though carriers with a 3PL/freight brokerage and shippers with private fleets are statistically small and fall within the margin of error for this survey.

Figure 3 – Percent of Women Employed as Over-The-Road Drivers



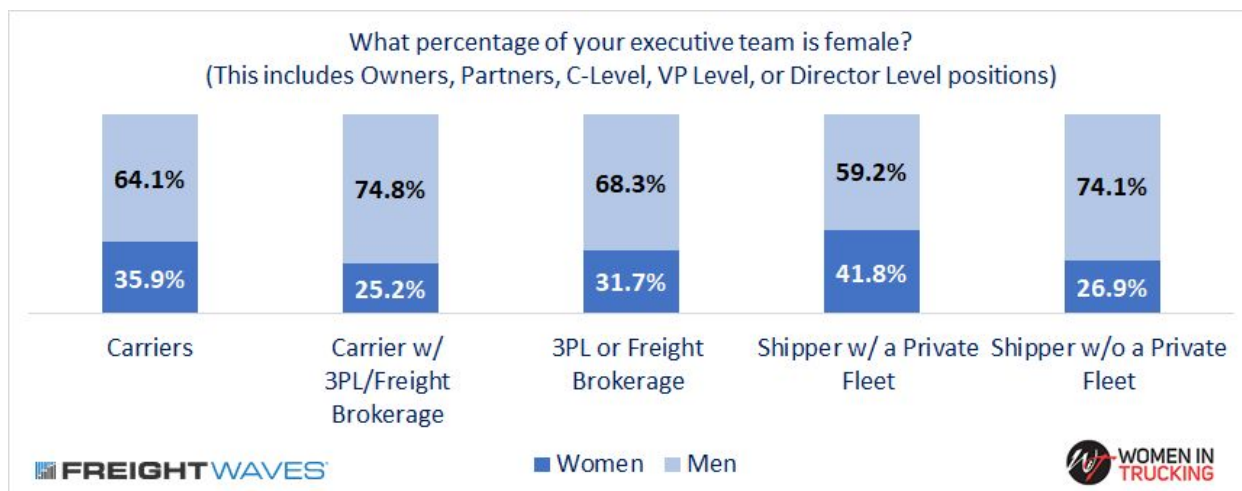
Source: FreightWaves and Women in Trucking Association Survey – September 2019

- The role of women as over-the-road (OTR) truck drivers increased to 10.2 percent in 2019.
- This is a 29.2 percent increase from Women in Trucking’s 2018 survey.



Women in executive positions in trucking also posted gains compared to the prior Women in Trucking survey percentage of 23.75 percent. In this survey, when you combine the results of asset-only carriers, carriers with 3PL/freight brokerages and shippers with private fleets, one-third of the management team are women.

Figure 4 – Percent of Women Employed as Executives



Source: FreightWaves and Women in Trucking Association Survey – September 2019

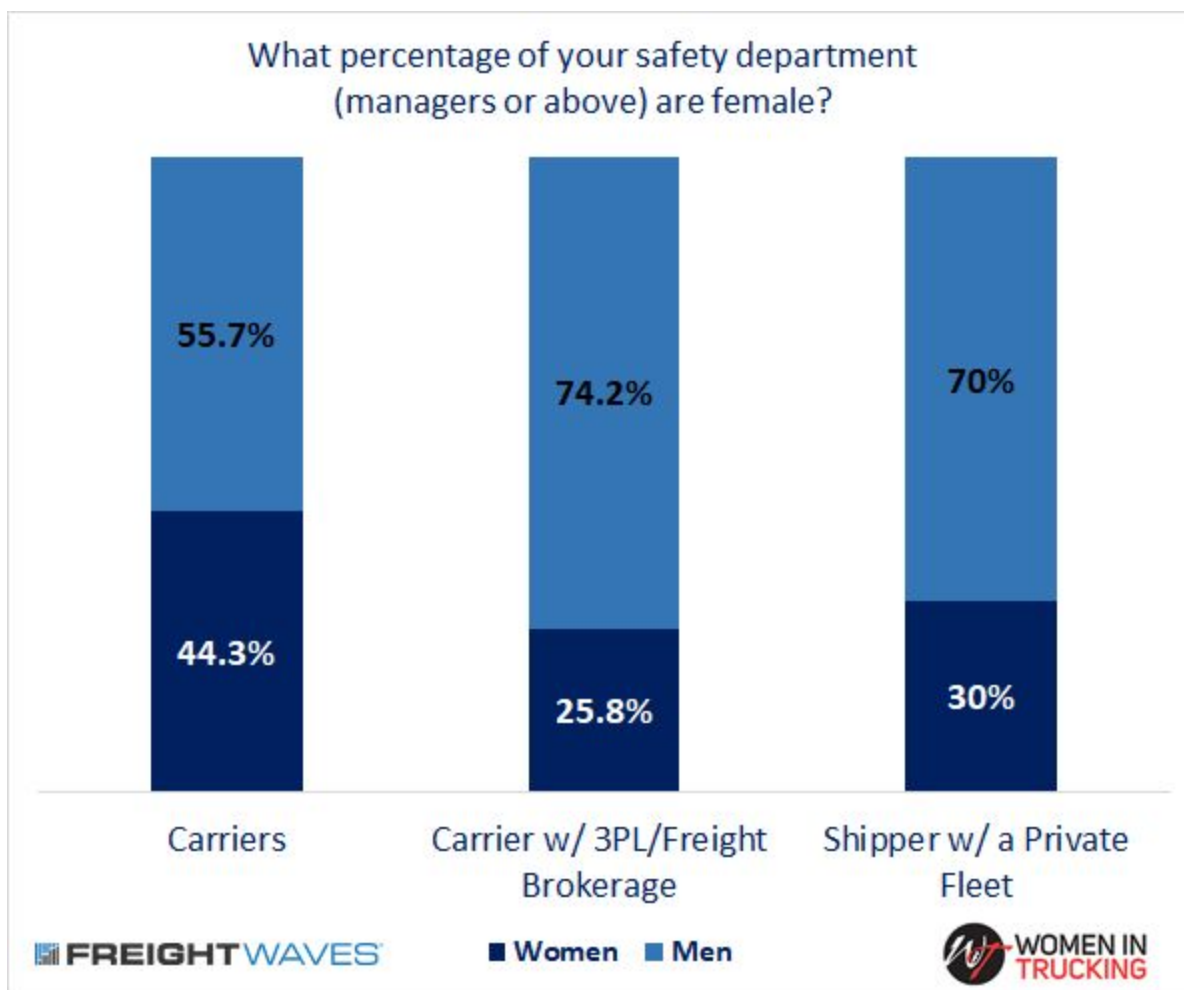
- While shippers with private fleet ranked highest for women in executive positions at 41.8 percent the sample size was the smallest in the survey.
- For-hire carriers were by far the largest sample size and women represent over one-third of the executive teams for this group.
- Women represent at least one in four executives in all market segments of trucking companies.



When looking at the representation of women in management positions at safety departments the numbers are closely aligned with the executive results in Figure 4.

When combining all trucking categories together 38.1 percent of fleet safety is managed by women. Asset-only for-hire carriers have the highest totals where women represent nearly half of the management teams. Oddly, carriers who also operate 3PLs or freight brokerages are much lower where only one in four safety executives are women.

Figure 5 – Percent of Women Employed as Executives in Safety



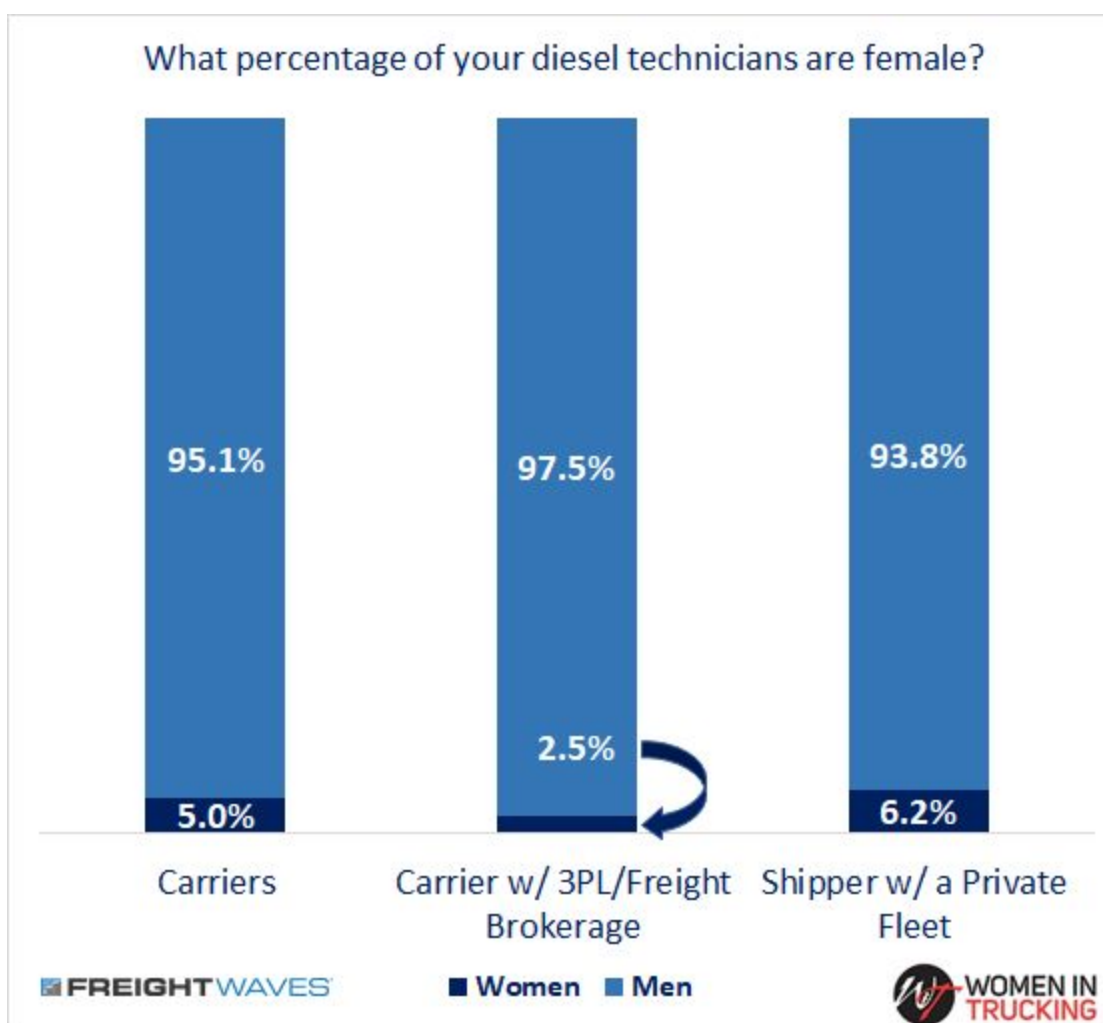
Source: FreightWaves and Women in Trucking Association Survey – September 2019



Two additional questions in the survey covered the representation of women outside of driving and management.

The first covers women employed as diesel technicians or management shown in Figure 6 above. The results show that while roughly 10 percent of truck drivers are women, only 4 percent of diesel technicians or mechanics are women.

Figure 6 – Percent of Women Employed as Diesel Technicians/Mechanics

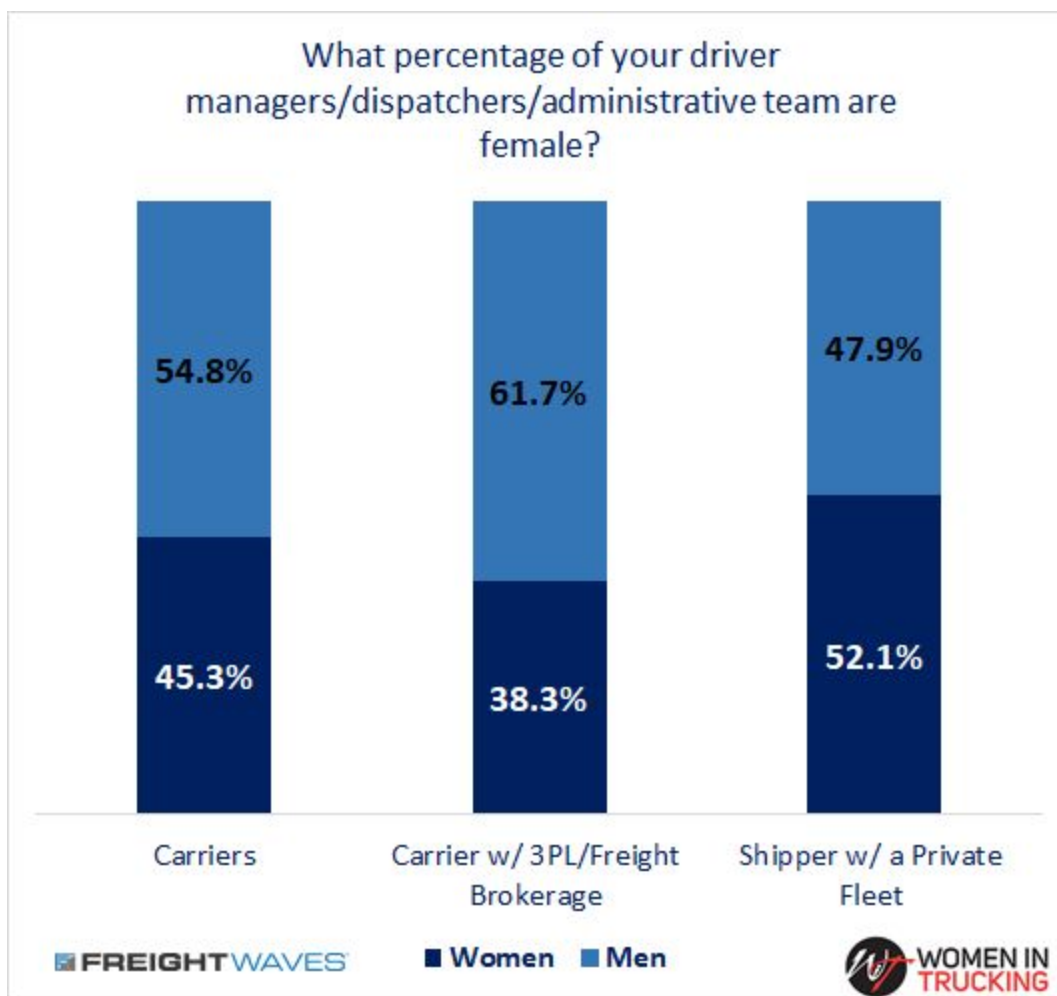


Source: FreightWaves and Women in Trucking Association Survey – September 2019



For non-executive positions in trucking companies women represent 43.5 percent of this overall workforce. This class of employees covers recruiting, driver managers, dispatch, sales and administrative positions like accounting and payables.

Figure 7 – Percent of Women Employed as Non-Manager/Executive



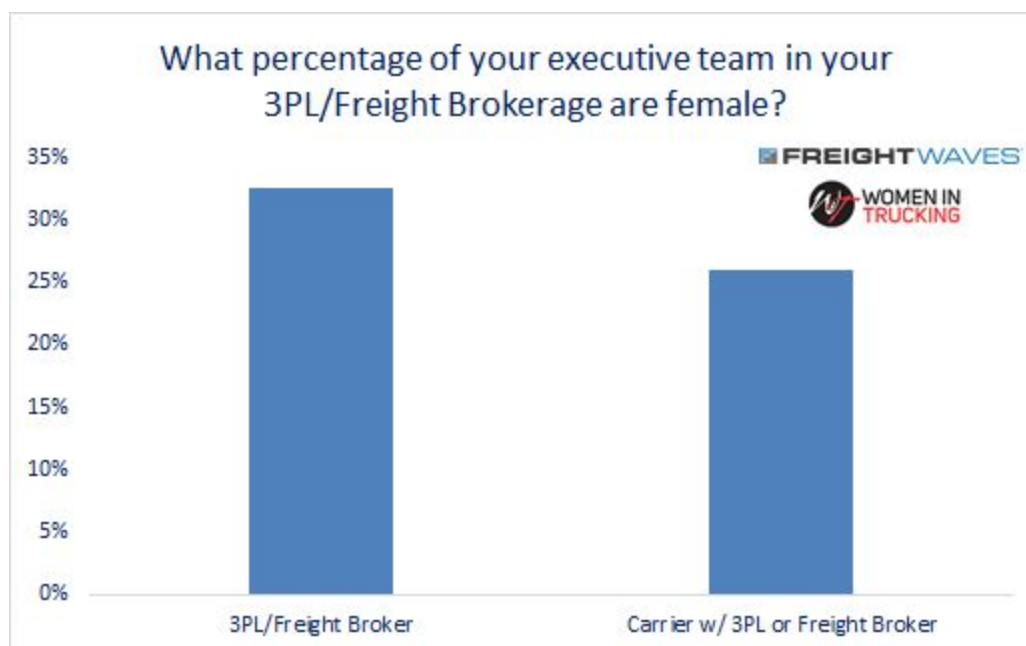
Source: FreightWaves and Women in Trucking Association Survey – September 2019



Women in Trucking Employment Trends – 3PL/Freight Brokerages

For non-asset and asset-based 3PLs/Freight Brokerages, women represent three out of 10 of all executives. This is slightly lower than the one-third of women executives at asset-based trucking companies. Though non-asset based 3PLs/freight brokers do hold an edge over their asset-based counterparts.

Figure 8 – Percent of Women Executives in 3PL/Freight Brokerages



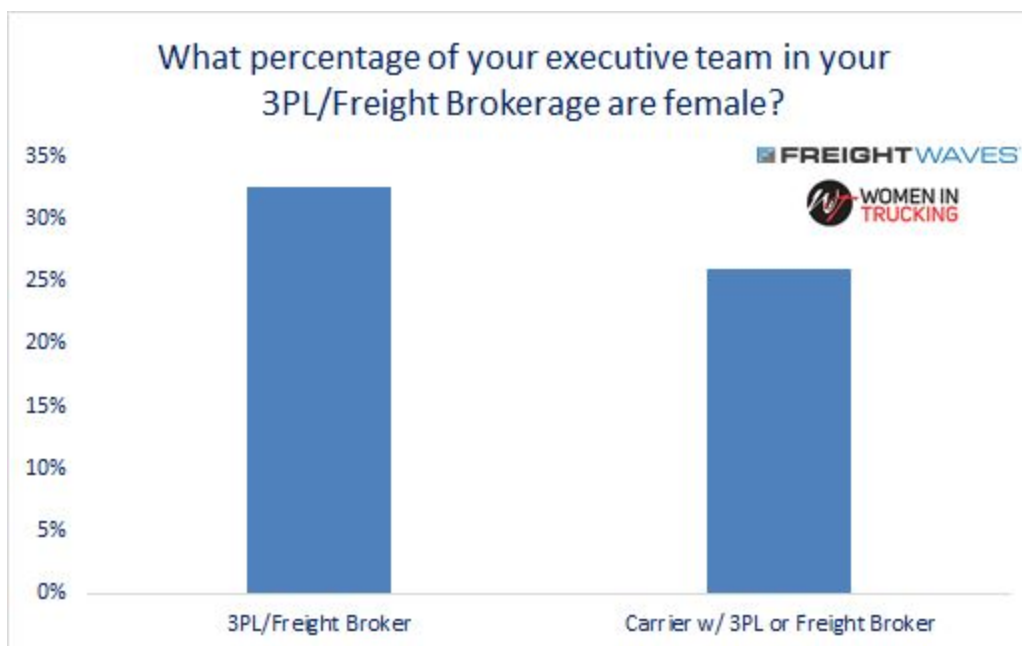
Source: FreightWaves and Women in Trucking Association Survey – September 2019

- 30 percent of executives at non-asset based 3PL/freight brokerages are executives, which is slightly below trucking companies where it is one-third.
- Non-asset based 3PLs though do hold an edge over asset-based 3PLs by six percentage points.



Two out of five of all freight brokers, carrier sales representatives, operations and administrative personnel at non-asset-based 3PLs/freight brokerages are women.

Figure 9 – Percent of Women as Freight Brokers/Carrier Sales/Admin roles in 3PL/Freight Brokerages



Source: FreightWaves and Women in Trucking Association Survey – September 2019

- Non-asset based 3PL or freight brokerages are in-line with asset-only carriers where 43.5 percent of non-management positions are held by women.
- Carriers with a 3PL or freight brokerage underperformed all other market segments in every category of female employment.



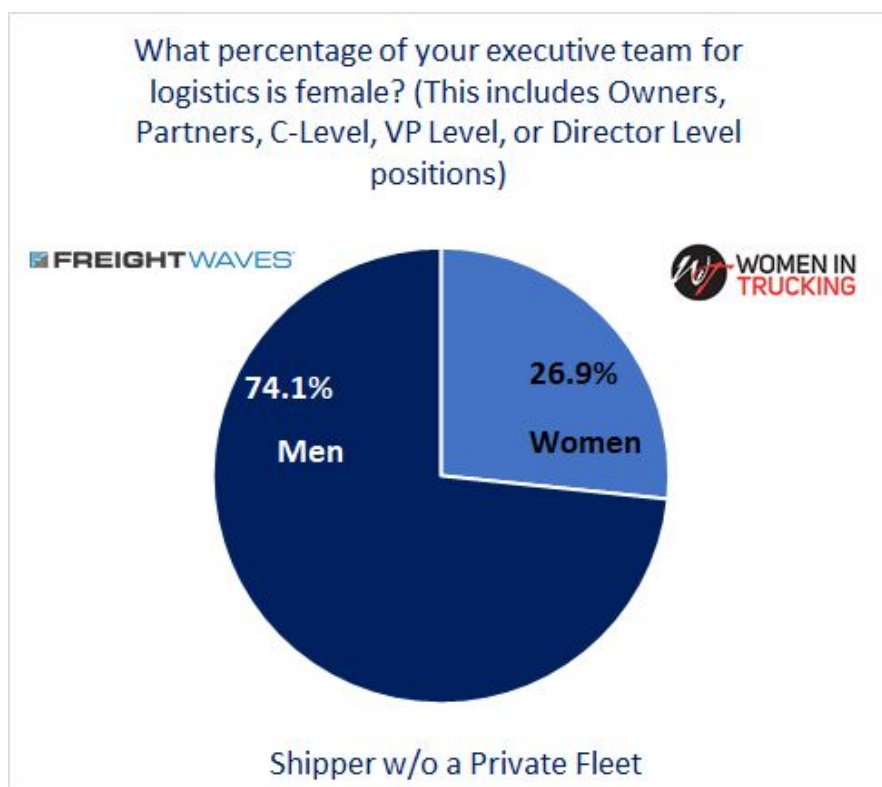
Women in Trucking Employment Trends – Shippers Without a Private Fleet

The vast majority of shippers do not own or operate a private fleet. For these manufacturers, retailers, distributors, etc., the logistics and transportation departments are essential for procuring and executing tens to thousands of truckloads per day.

In these logistics departments, 26.9 percent of the executive team are women. These results rank second-lowest among all trucking and logistics market segments in the survey.

In contrast, shippers without a private fleet do rank first in all market segments for the percentage of women in non-management roles in shipping, logistics and supply chain positions.

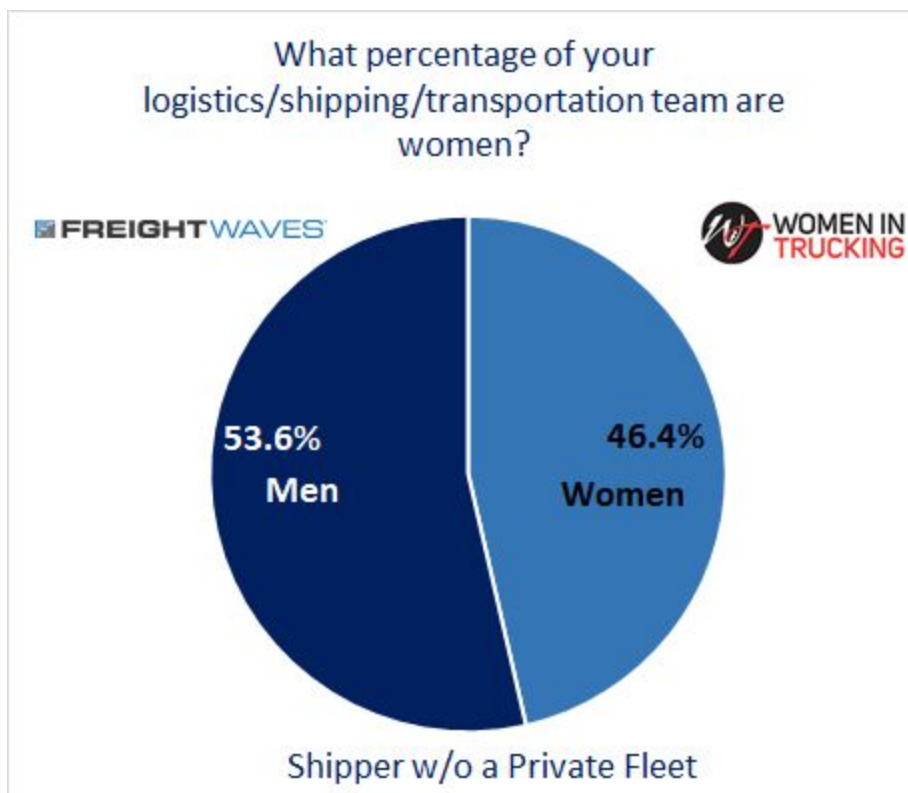
Figure 10 – Percent of Women in Executive Roles at Shippers Without a Private Fleet



Source: FreightWaves and Women in Trucking Association Survey – September 2019



Figure 11 – Percent of Women in Non-Management Roles at Shippers Without a Private Fleet



Source: FreightWaves and Women in Trucking Association Survey – September 2019

Women in Trucking Employment Trends – Freight Tech

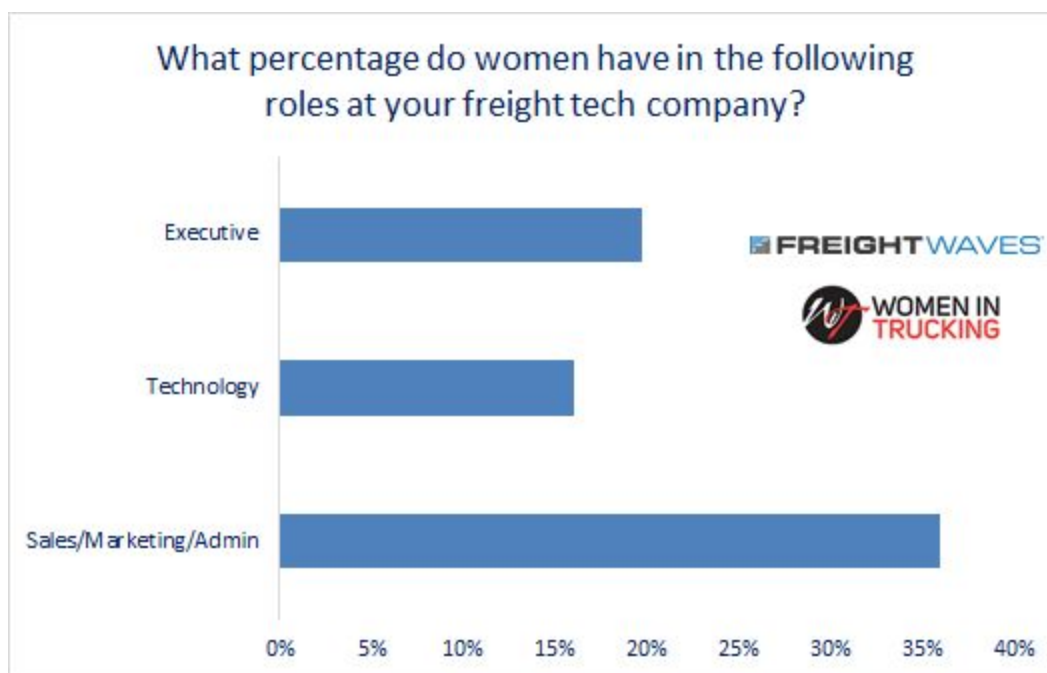
Freight Tech companies overall have a lower representation of women than asset and non-asset based trucking and logistics companies.

Women comprise just under 20 percent of all executives in freight tech, which is 42 percent less than trucking and logistics companies. There are more women in executive roles at Freight Tech companies than on the technology team though, where only 16 percent of software engineers and developers are women.

Only 36 percent of women are employed in sales, marketing and accounting. Compared with trucking and logistics companies, this representation is 17 percent below its average of 43.55 percent.



Figure 12 – Percent of Women Employed in Freight Tech



Source: FreightWaves and Women in Trucking Association Survey – September 2019

- Freight tech companies have a lower percentage of women employed in either executive or sales/marketing/administration roles than trucking or logistics companies.
- Only 19 percent of freight tech executives are women, which is almost half the rate of trucking and logistics companies.
- 16 percent of Freight Tech’s technology staff is comprised of women.



Women In Trucking Association, Inc.

Women In Trucking Association, Inc. is a nonprofit association established to encourage the employment of women in the trucking industry, promote their accomplishments and minimize obstacles faced by women working in the trucking industry. Membership is not limited to women, as 17 percent of its members are men who support the mission. Women In Trucking is supported by its members and the generosity of Gold Level Partners: Arrow Truck Sales, BMO Transportation Finance, Daimler Trucks North America, Expediter Services, FedEx Freight, Great Dane, J.B. Hunt Transport, Michelin North America, Penske Transportation Solutions, Peterbilt Motors Company, Ryder System, and Walmart. Follow WIT on Twitter, Facebook, or LinkedIn. For more information, visit www.womenintrucking.org or call 888-464-9482.

Ellen Voie, CAE, PDC

Women In Trucking Association, Inc.

P O Box 400, Plover, WI 54467-0400

888-464-9482 920-312-1350 Mobile

FreightWaves

FreightWaves is one of the fastest-growing enterprise software-as-a-service (SaaS) companies in the world. In less than three years, FreightWaves has become the leading provider of data and analytics for the global freight market. FreightWaves' team of 150 full-time captures, models, and interprets near-time data from more than one thousand sources to provide participants with the fastest insights into the global freight market. The company offers the fastest data in the industry and the most complete view across all modes of freight transportation. SONAR, the company's SaaS offering, is a market dashboard that provides companies involved in transportation with access to datasets that can help them optimize their routing, pricing, and planning decisions.

FreightWaves is also the largest publisher of freight news and data in the world. FreightWaves.com publishes 40+ news articles per day, providing commentary and analysis for freight transportation, while FreightWaves TV is the first and only streaming TV network for the transport and logistics industry.



FreightWaves Freight Intel Contacts

Kevin Hill, Director of Research
(646) 731-4735, khill@freightwaves.com

Seth Holm, Senior Research Analyst
(404) 840-2064, sholm@freightwaves.com

Andrew Cox, Research Analyst
(615) 495-4507, acox@freightwaves.com