

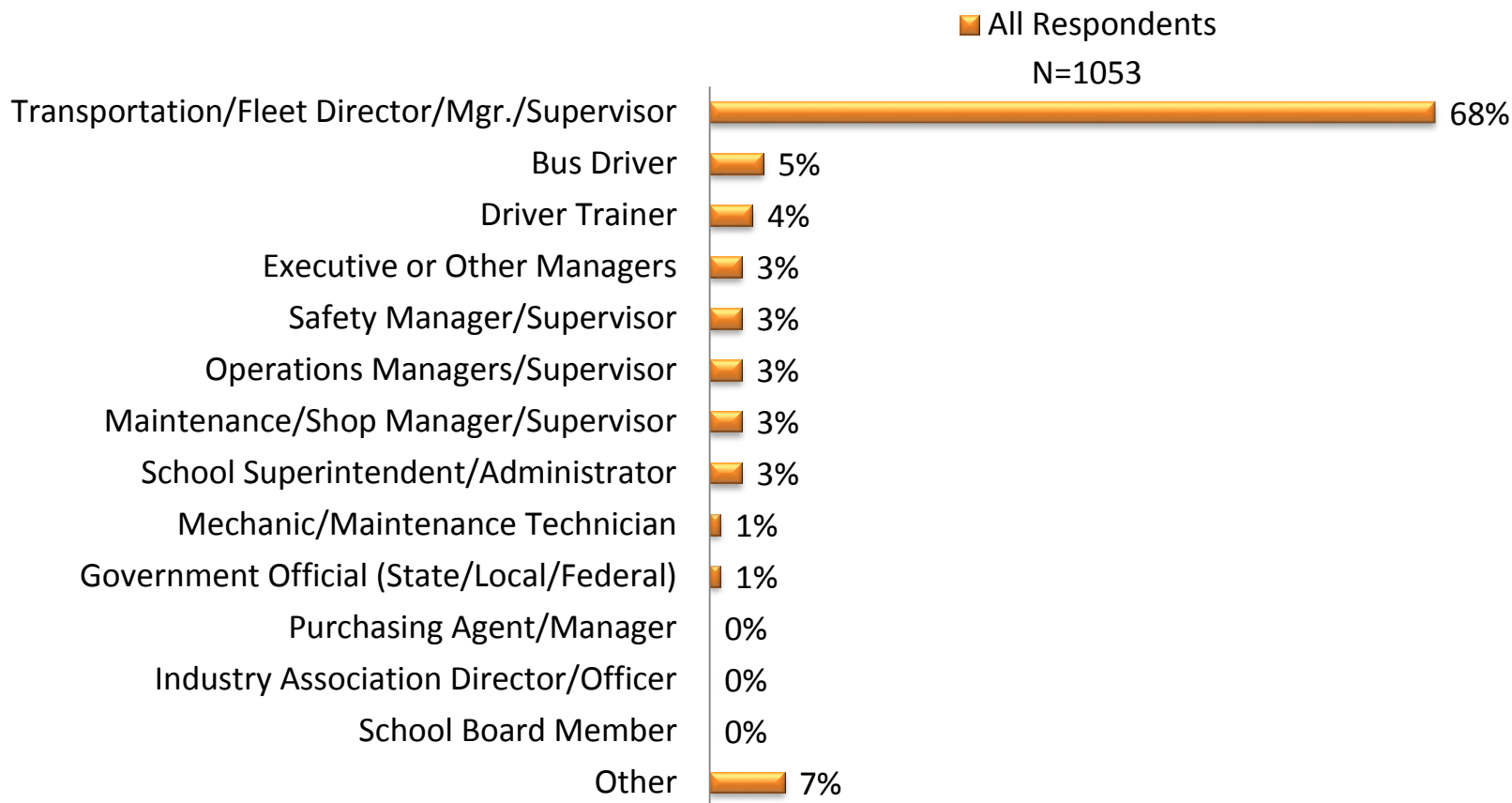


Driver Shortage Study

Fall 2016

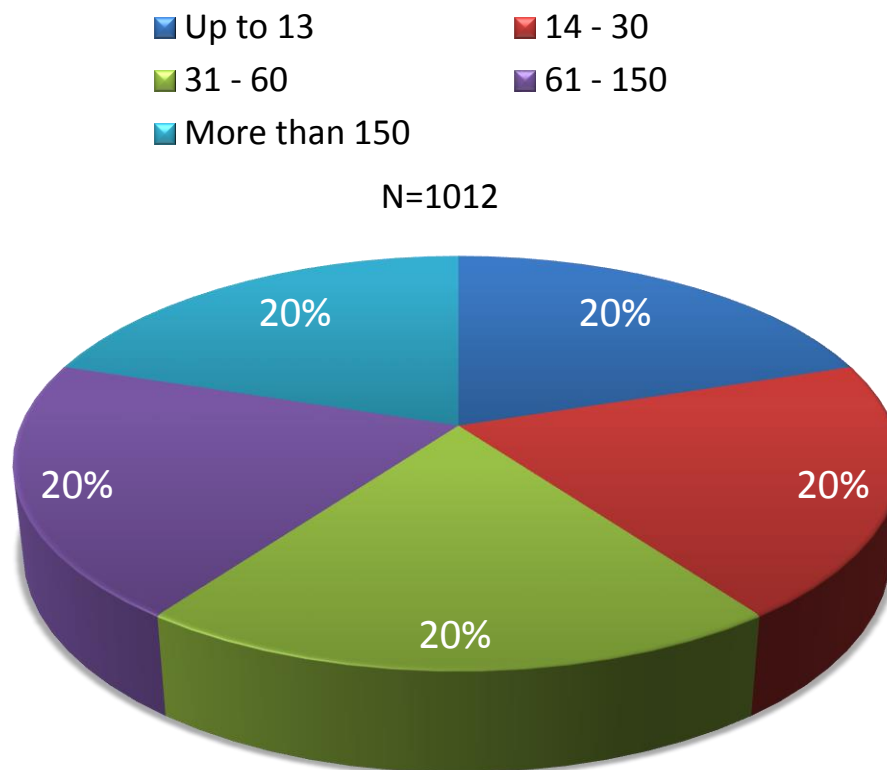
Job Title/Position – All Respondents

- Two-thirds of respondents have the job title of transportation/fleet director, or transportation/fleet manager or transportation/fleet supervisor.

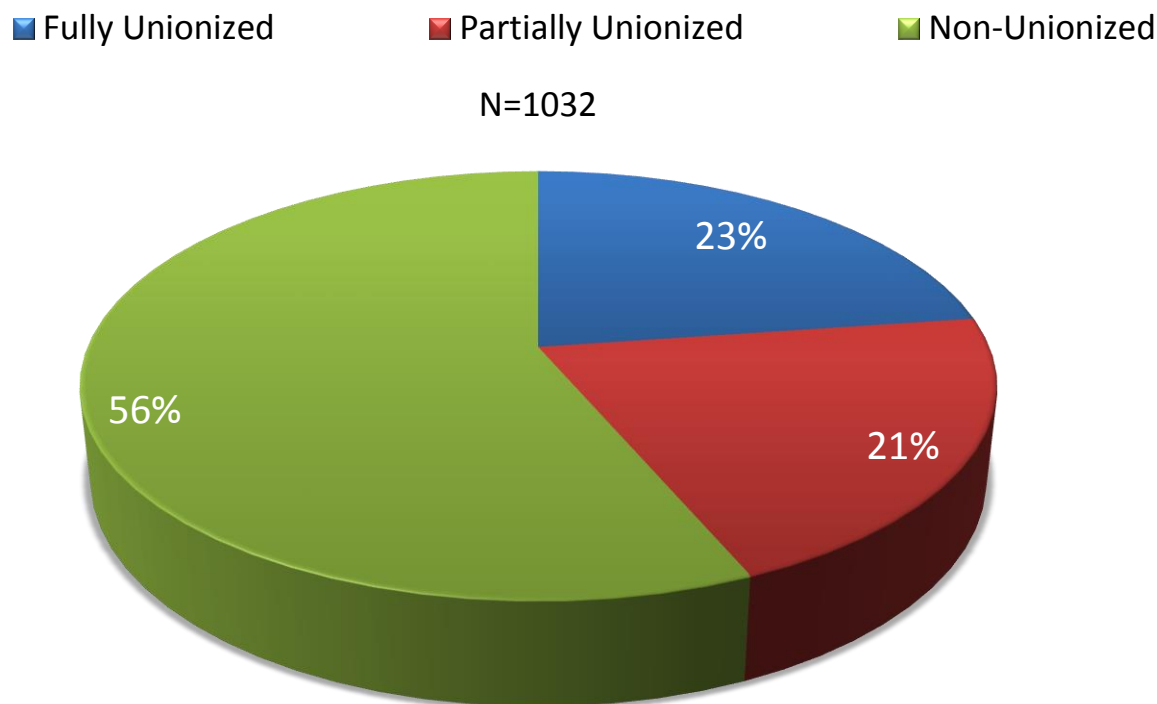


Number of Routes – All Respondents

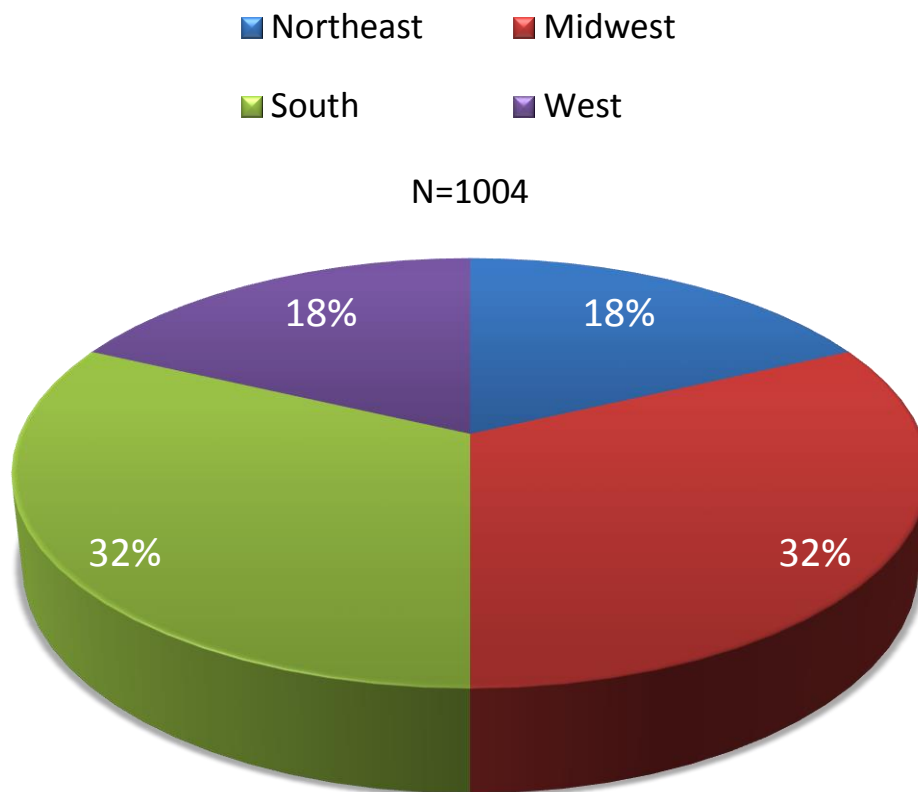
- The number of routes run in the am or pm was used as a proxy for the number of buses that a company or school district has, and that number was divided into quintiles (20% increments). The bottom 20% of respondents cover up to 13 routes in the am or pm, while the largest 20% cover more than 150 routes.



- The drivers for most respondents' companies and school districts do not belong to a union.



- Roughly one-third of respondents work in the Midwest region, and another third work in the South region.

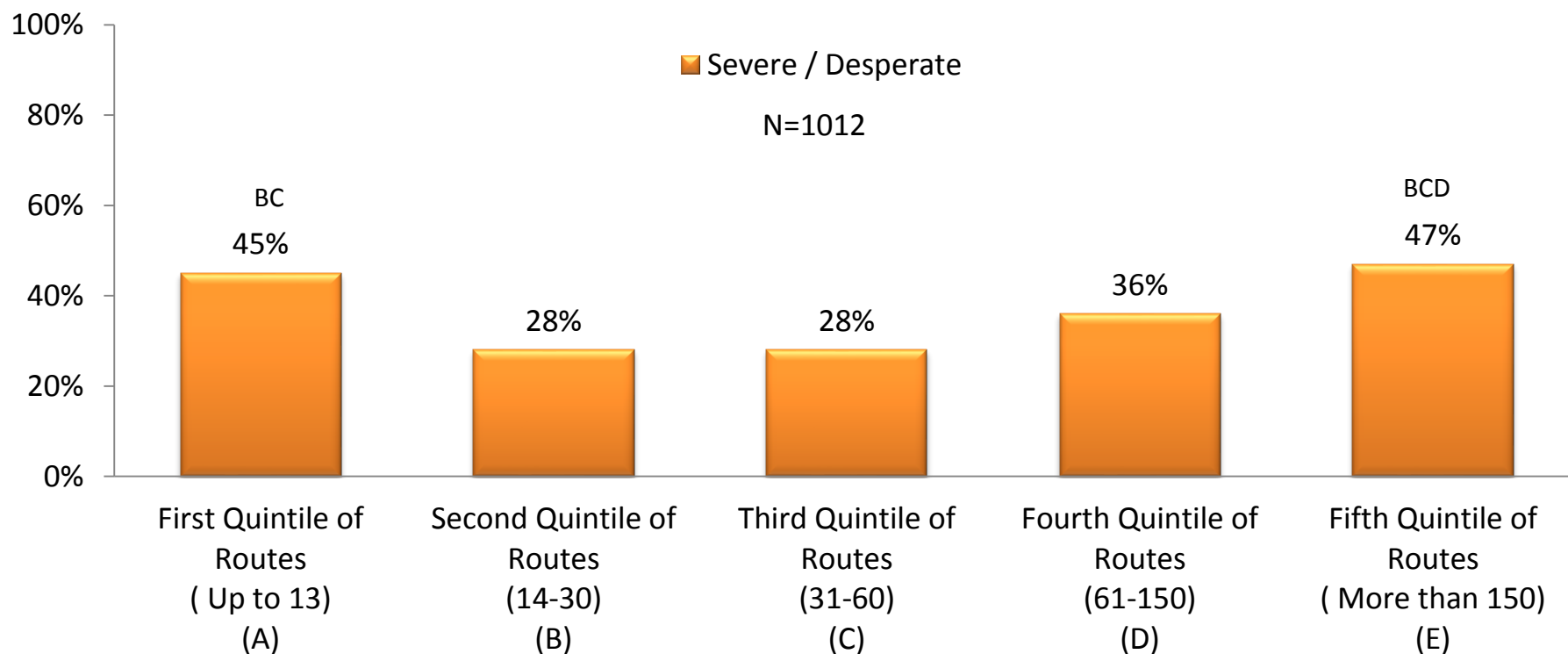


Driver Shortage - Overview

Degree of School Bus Driver Shortage – Number of Routes

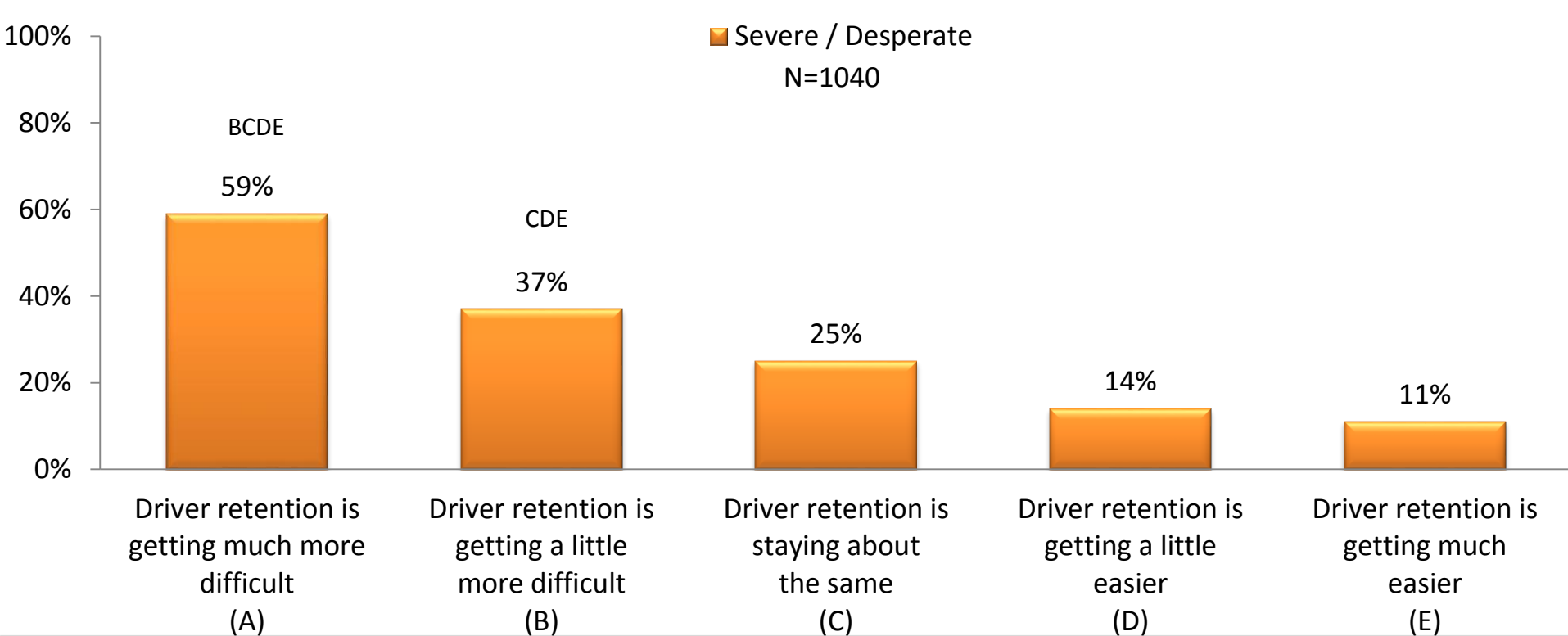
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- The driver shortage is reportedly a more severe problem among the smallest 20% of companies and school districts as well as the largest 20% of companies and school districts, compared to those that are medium sized.



Degree of School Bus Driver Shortage – Driver Retention

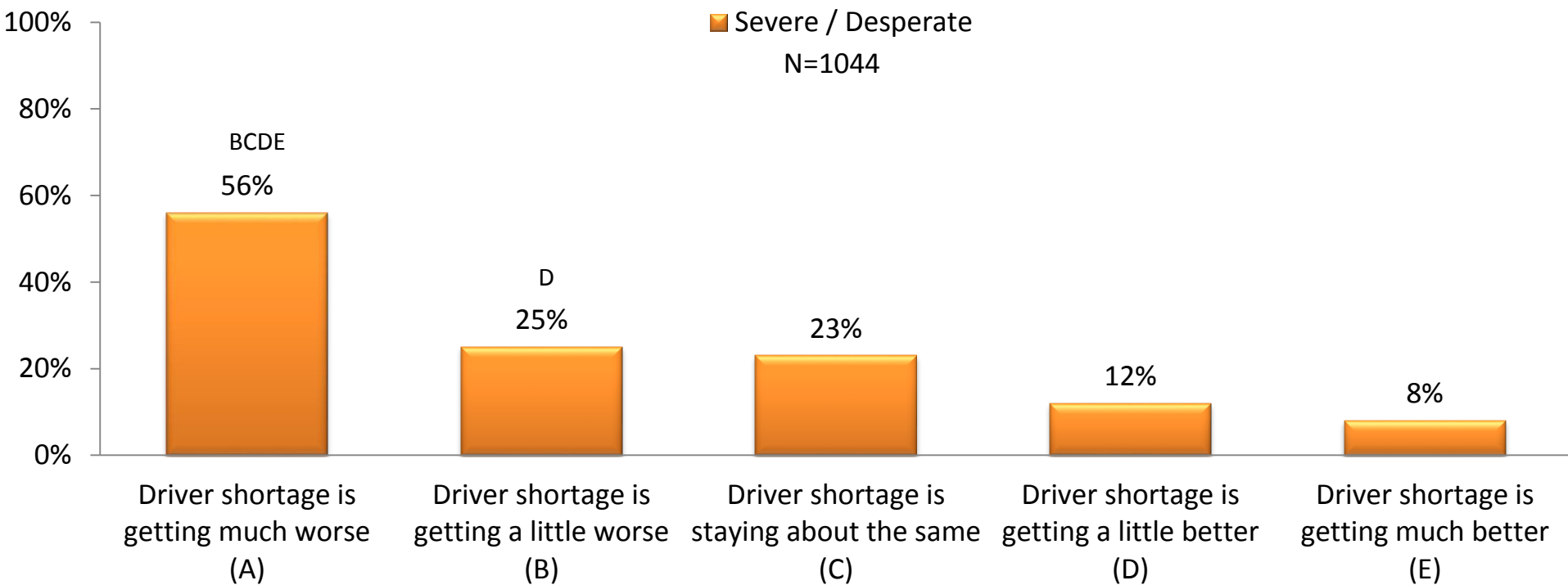
- There is a positive correlation between those who believe the problem is severe or desperate, and their perception that driver retention is getting more difficult.



Degree of School Bus Driver Shortage – Shortage Trend

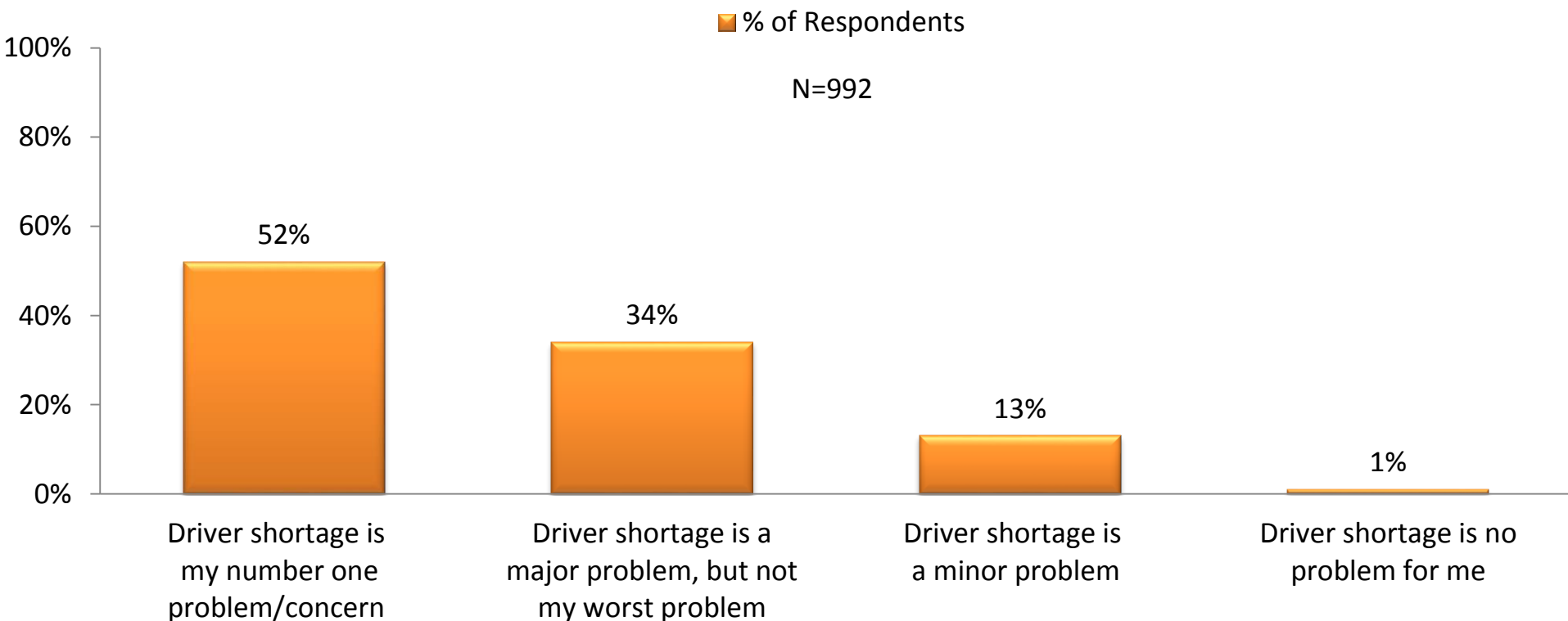
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- More than half of respondents (56%) who indicated that driver shortage is getting to be much worse, also indicated that driver shortage is severe or desperate for their company or school district.

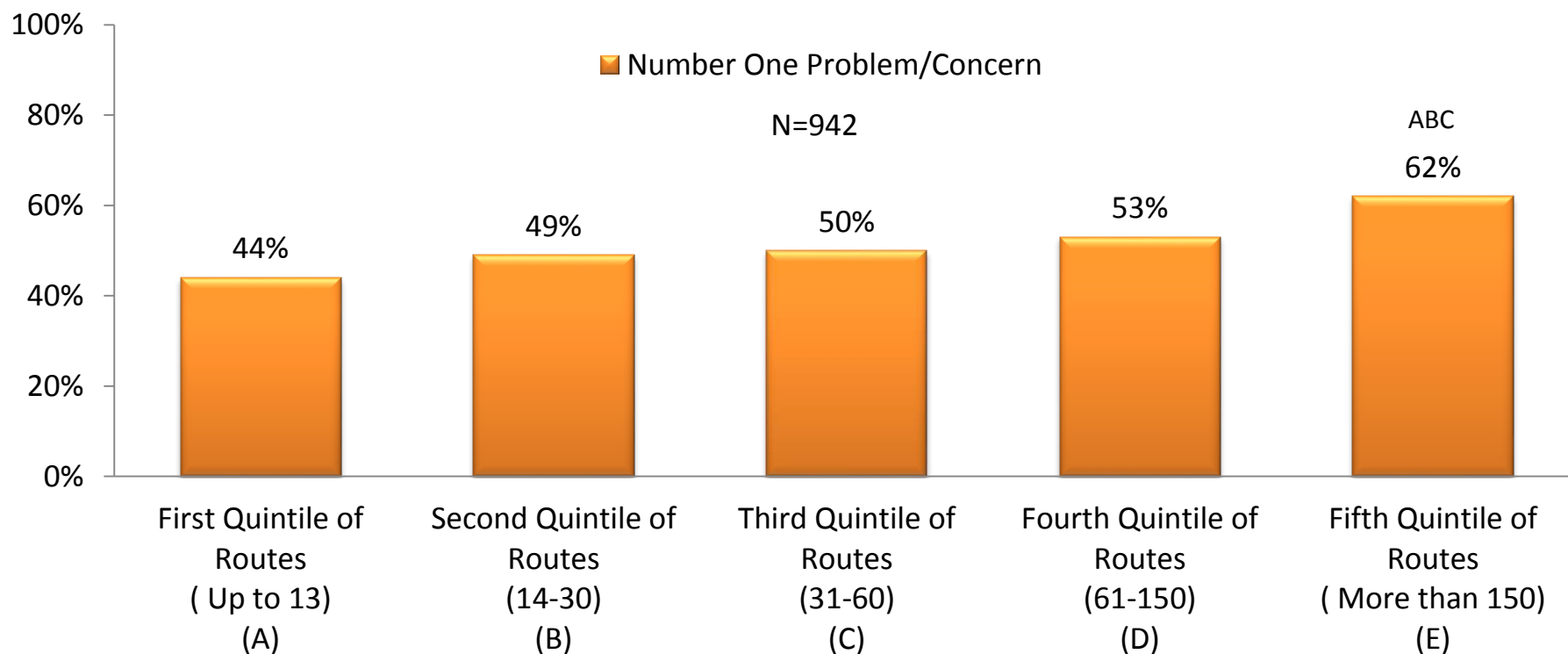


Driver Shortage - Magnitude of the Problem

- For more than half of all respondents (52%), dealing with a shortage of bus drivers is their number one problem or concern.

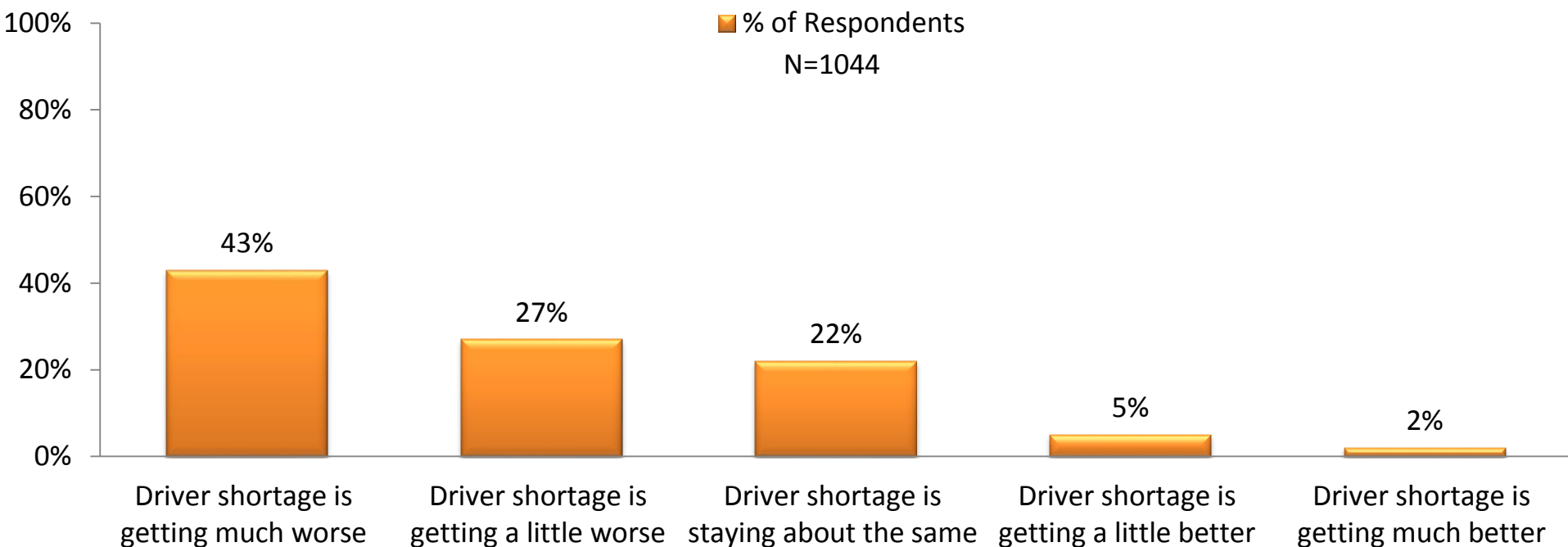


- Sixty-two percent (62%) of respondents from the largest companies and school districts report that dealing with a shortage of bus drivers is their number one problem or concern, compared to those in the bottom three quintiles.



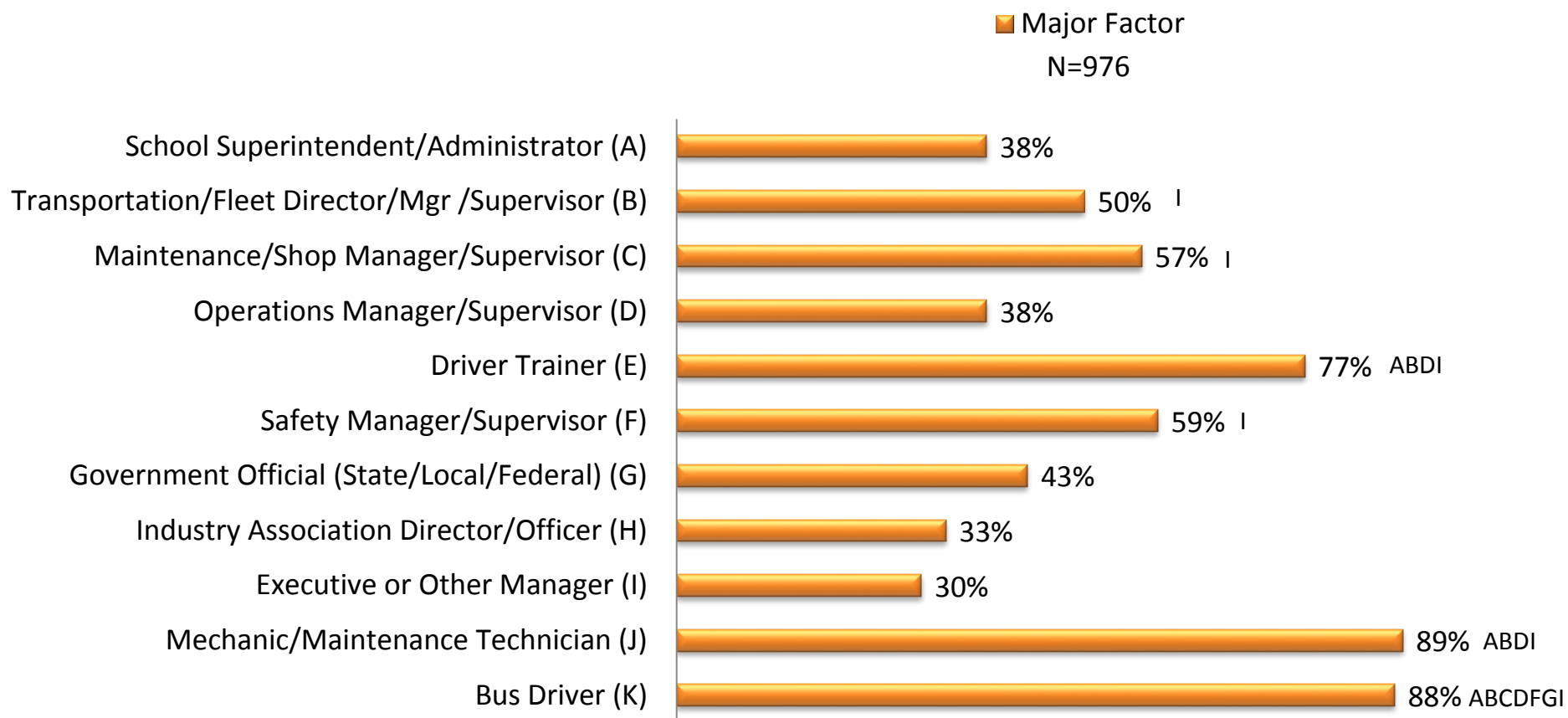
Driver Shortage – Trend

- Seventy percent (70%) of all respondents believe the trend for having a shortage of bus drivers is getting a little worse, or much worse.

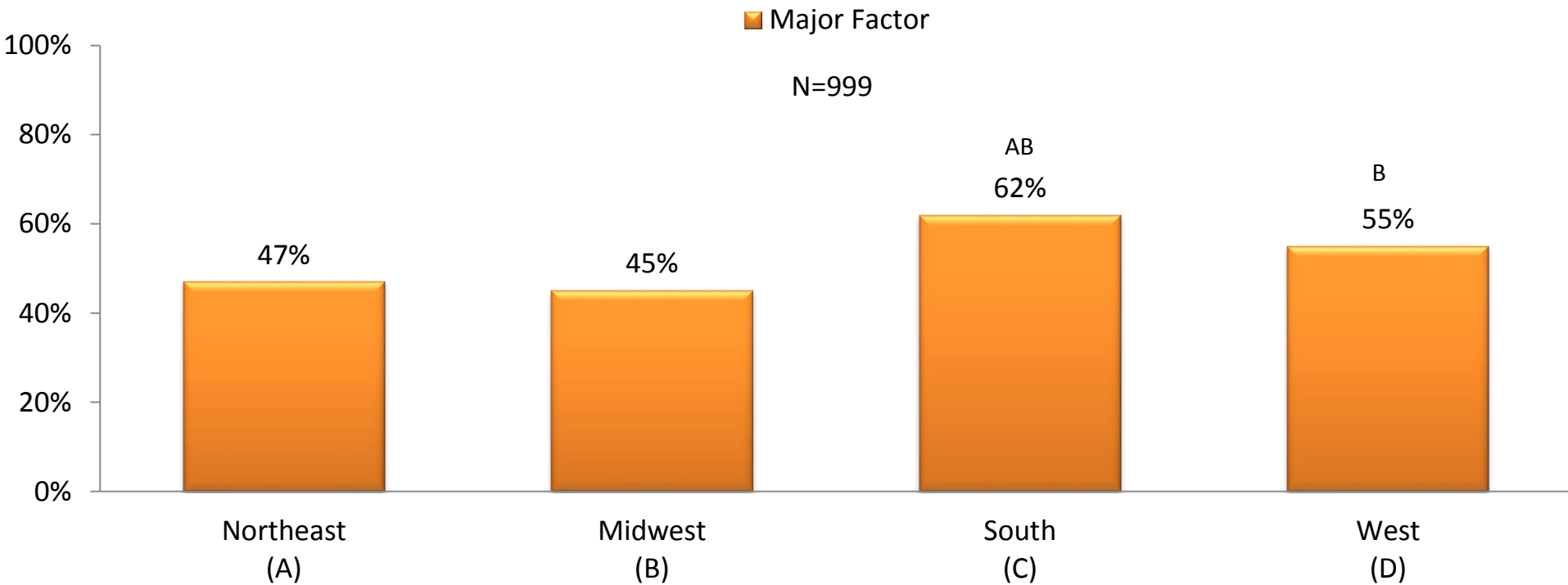


Factors in Ability to Recruit and Retain Drivers

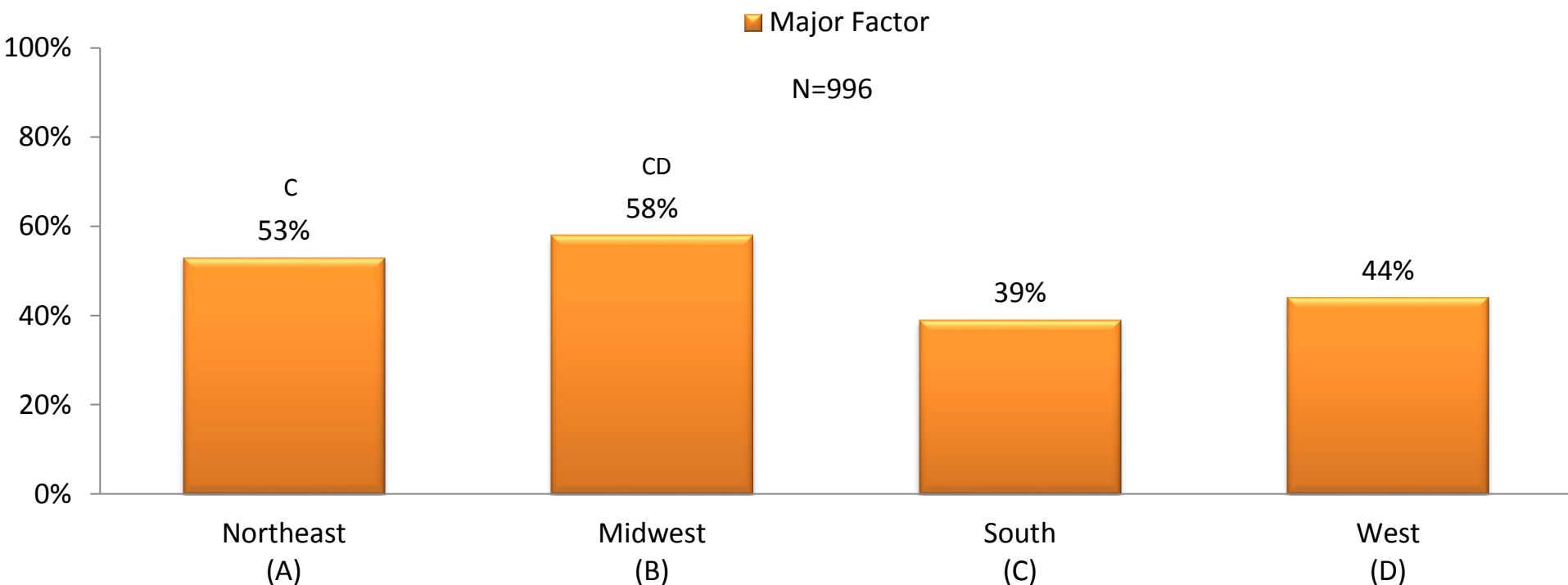
- The chart below shows the percentage of respondents in each job classification who believe that the rate of pay is a major factor in their ability to recruit and retain bus drivers.



- A larger percentage of respondents in the South and West regions believe the rate of pay is a major factor in their ability to recruit and retain bus drivers, compared to respondents in the Northeast and Midwest regions.



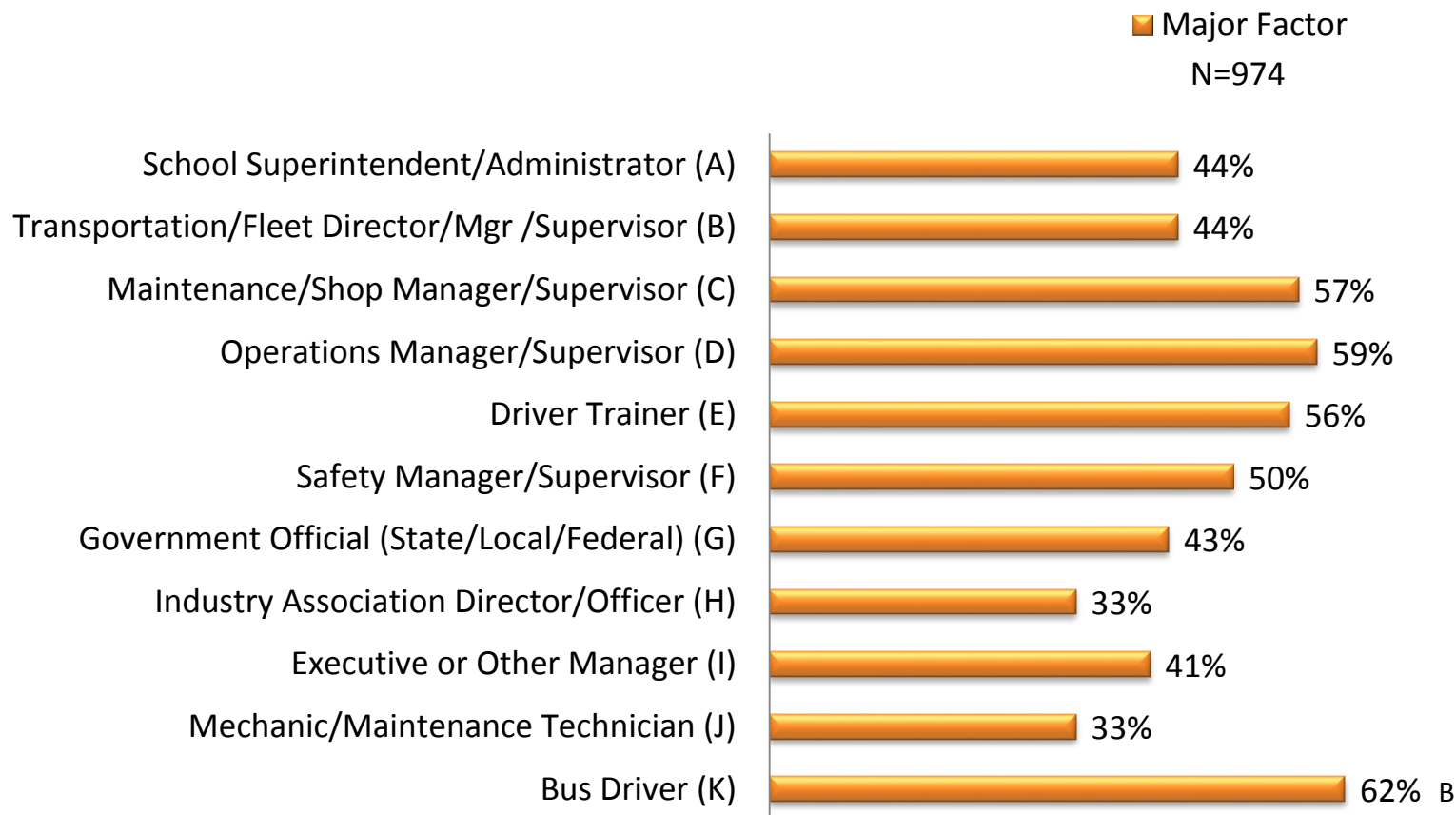
- A higher percentage of respondents in the Northwest and Midwest regions believe benefits are a major factor in their ability to recruit and retain drivers, while a previous slide showed that those in the South and West are more likely to believe that pay is a major factor.



Major Factor – Hours Available to Work – Job Title

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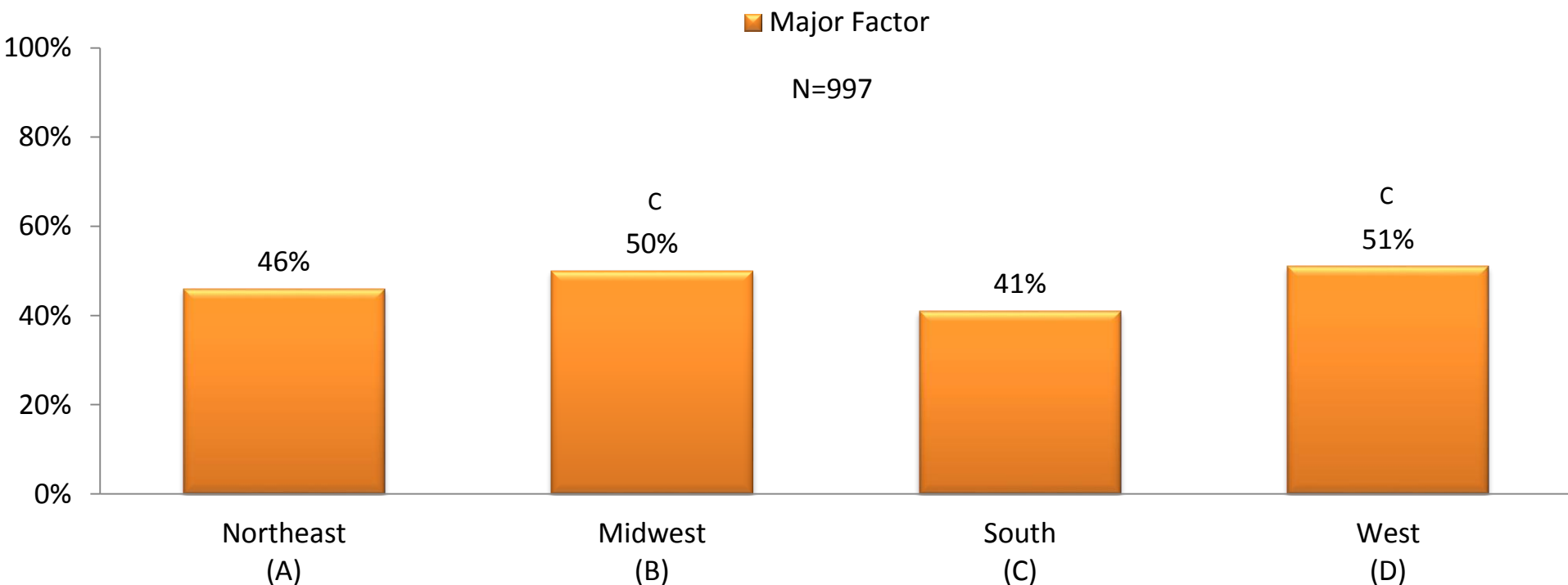
- Bus drivers are more likely than transportation/fleet directors to believe that the number of hours that are available to work is a major factor in their ability to recruit and retain drivers.



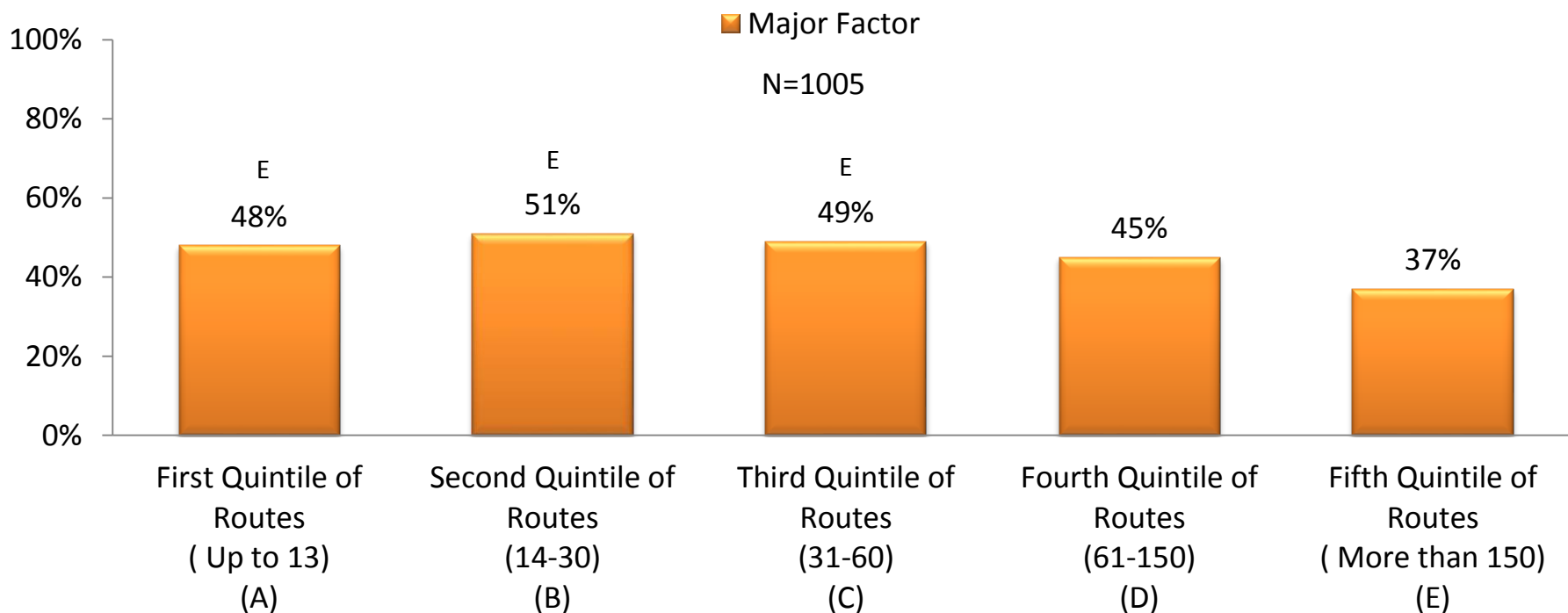
Major Factor – Hours Available to Work – Region

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- A larger percentage of respondents in the Midwest and West regions believe that the availability of hours is a major factor in recruiting and retaining bus drivers.



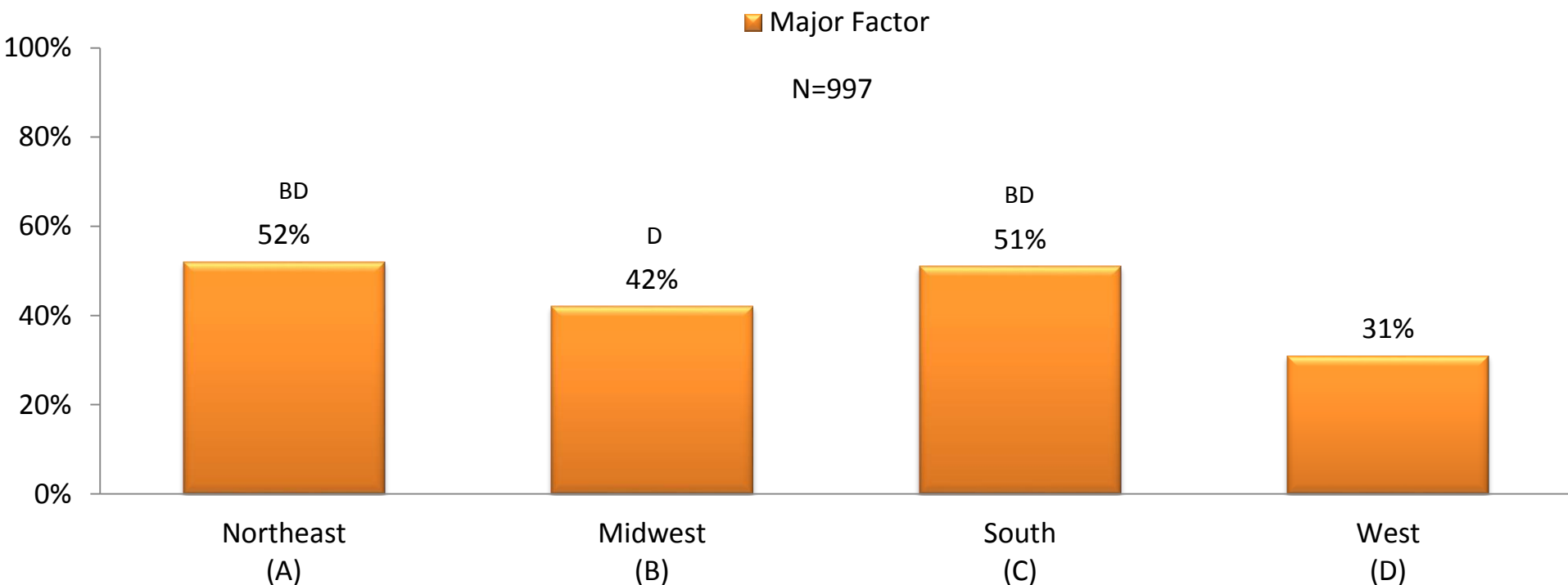
- Respondents from larger organizations are less likely than those in the bottom three quintiles to believe that the availability of hours is a major factor in recruiting and retaining bus drivers.



Major Factor – Obtaining a CDL – Region

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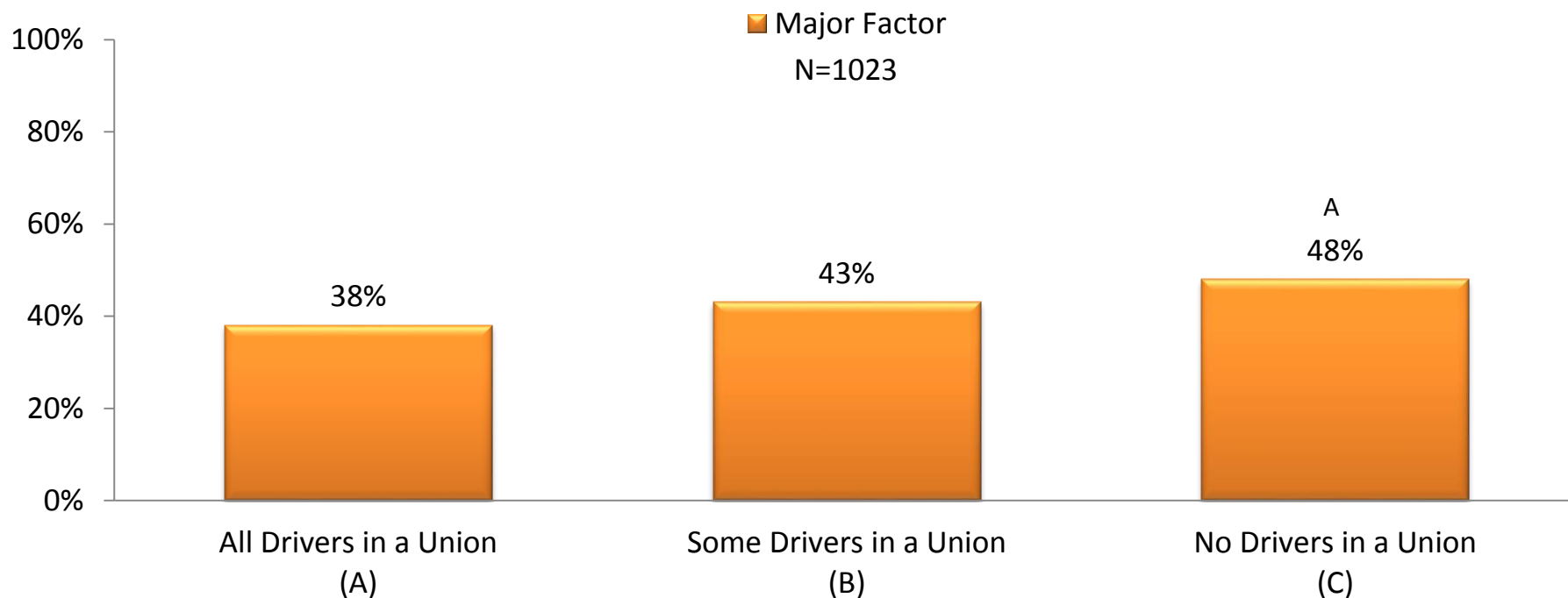
- Obtaining the CDL is believed to be less of a factor in recruiting and retaining drivers in the West region than in other regions.



Major Factor – Obtaining a CDL – Union

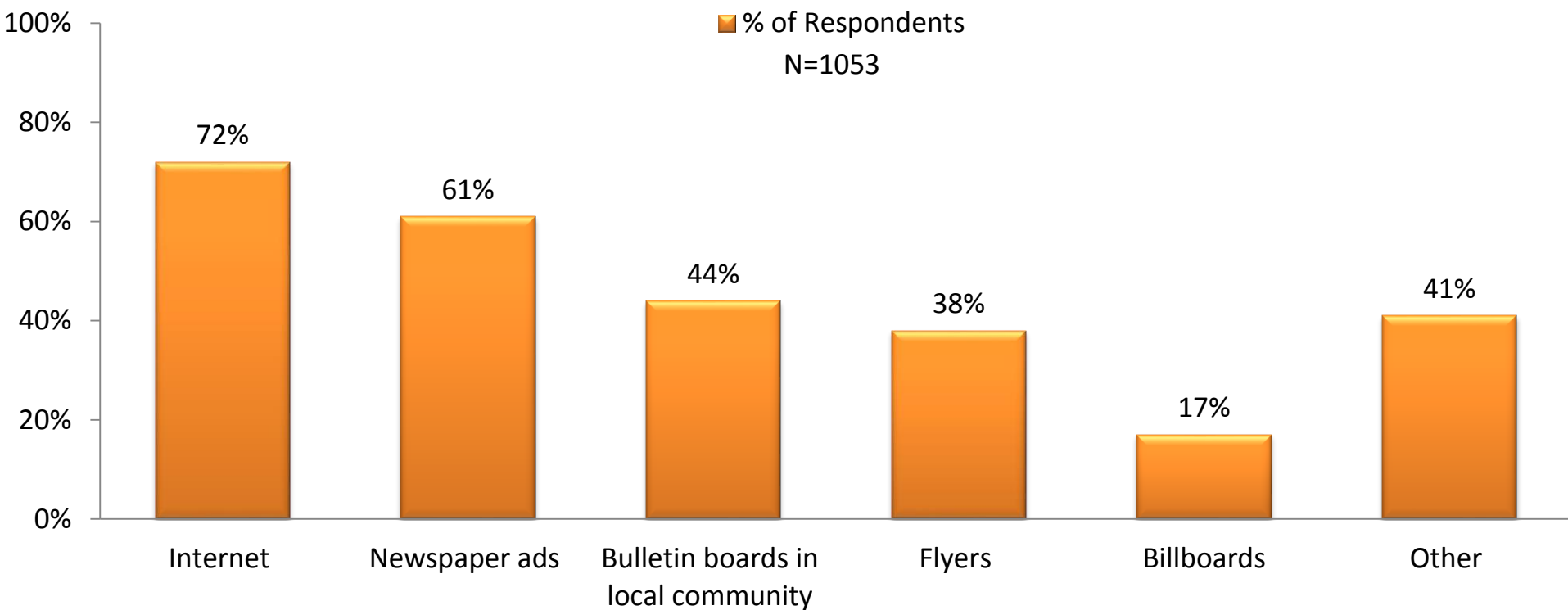
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- Nearly half of all respondents from non-union companies and school districts (48%), believe obtaining the CDL is a major factor in their ability to recruit and retain bus drivers.

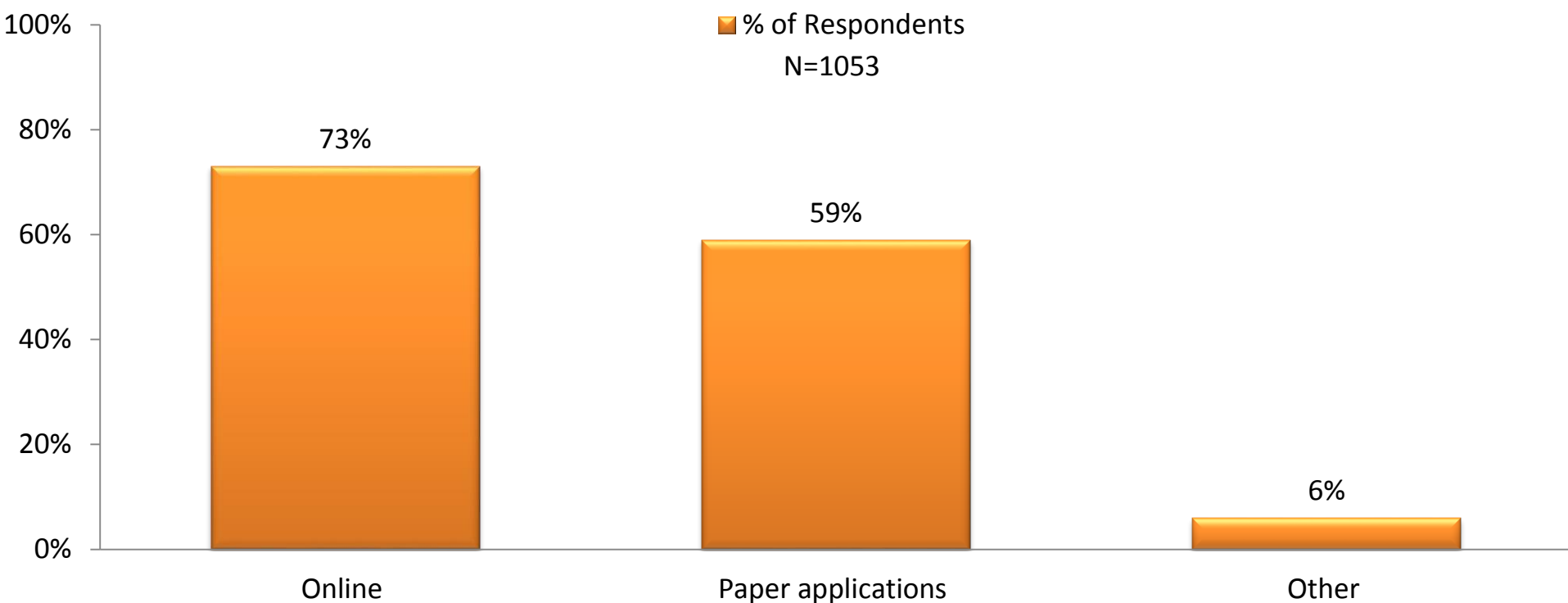


Recruiting Drivers

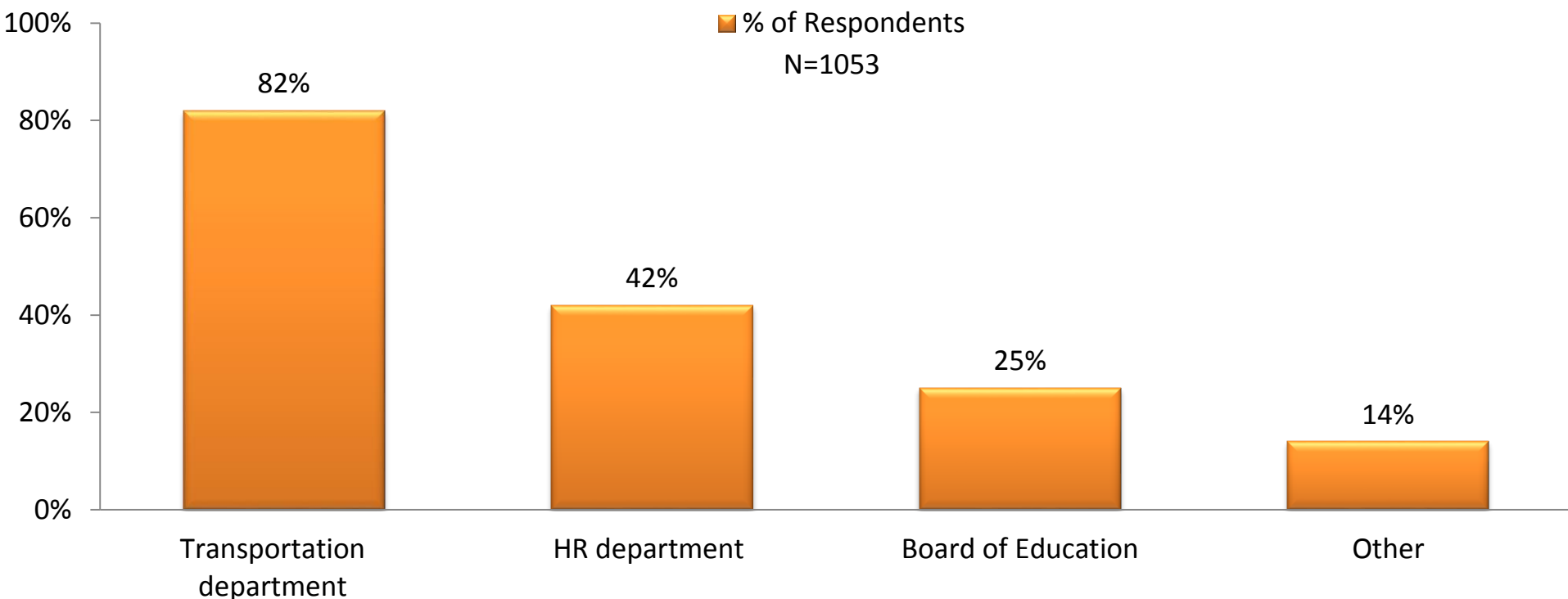
- Most respondents advertise for bus drivers on the Internet (72%) and in newspaper ads (61%).



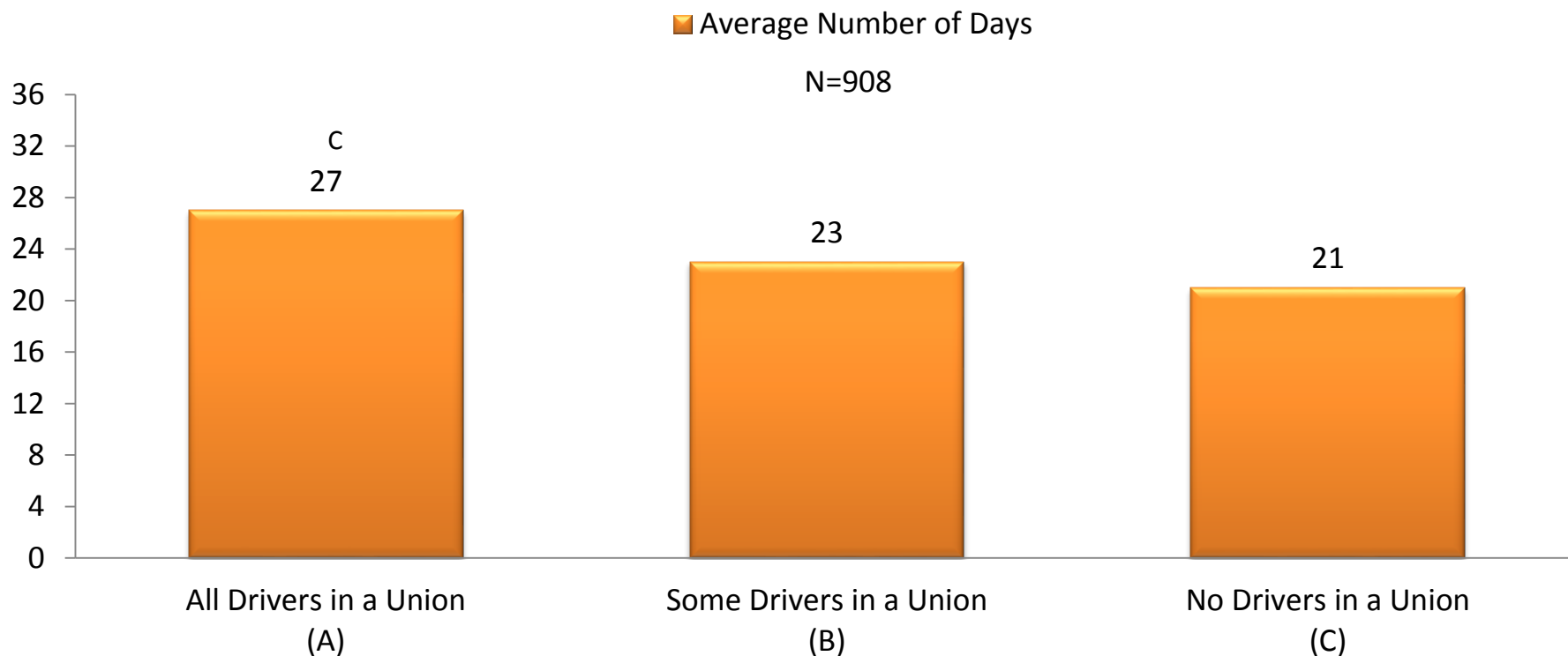
- Most respondents accept electronic applications online as well as paper applications, with online applications being more prevalent.



- Most respondents indicated that their transportation department has hiring authority.
- The percentages below total to more than 100% as respondents were invited to select all applicable options.



- Respondents whose drivers belong to a union report that their application and hiring process takes about one week longer, on average, than for those whose drivers do not belong to a labor union.
- The overall average (mean) for all respondents is 23 days, while the median (mid point) number of days is 14.

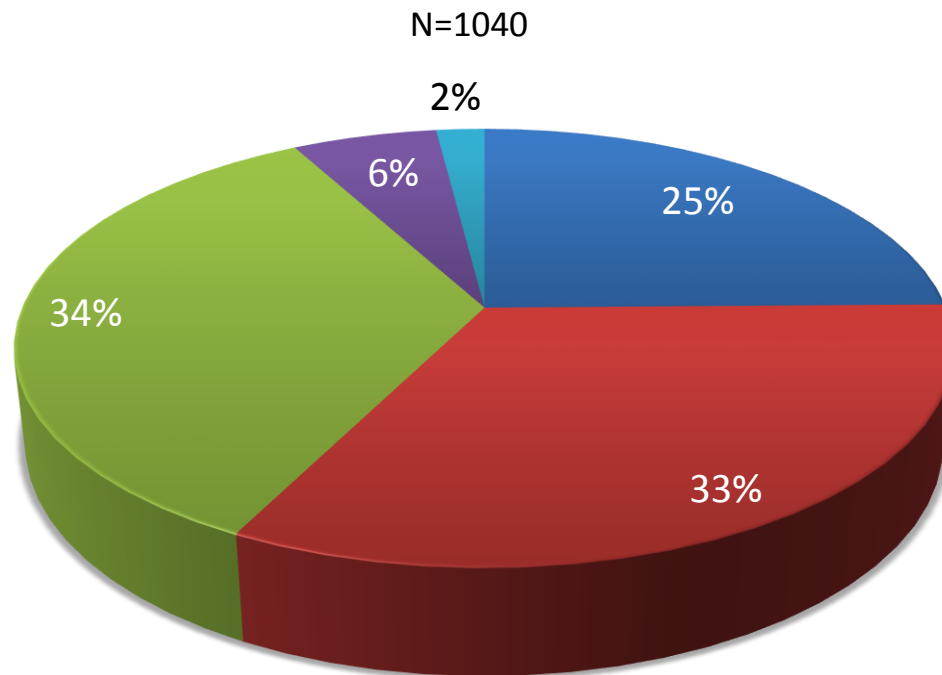


Retaining Drivers

- More than half of all respondents (58%) believe the trend in driver retention is getting a little more difficult, or much more difficult for their company or school district.

■ Driver retention is getting much more difficult
■ Driver retention is staying about the same
■ Driver retention is getting much easier

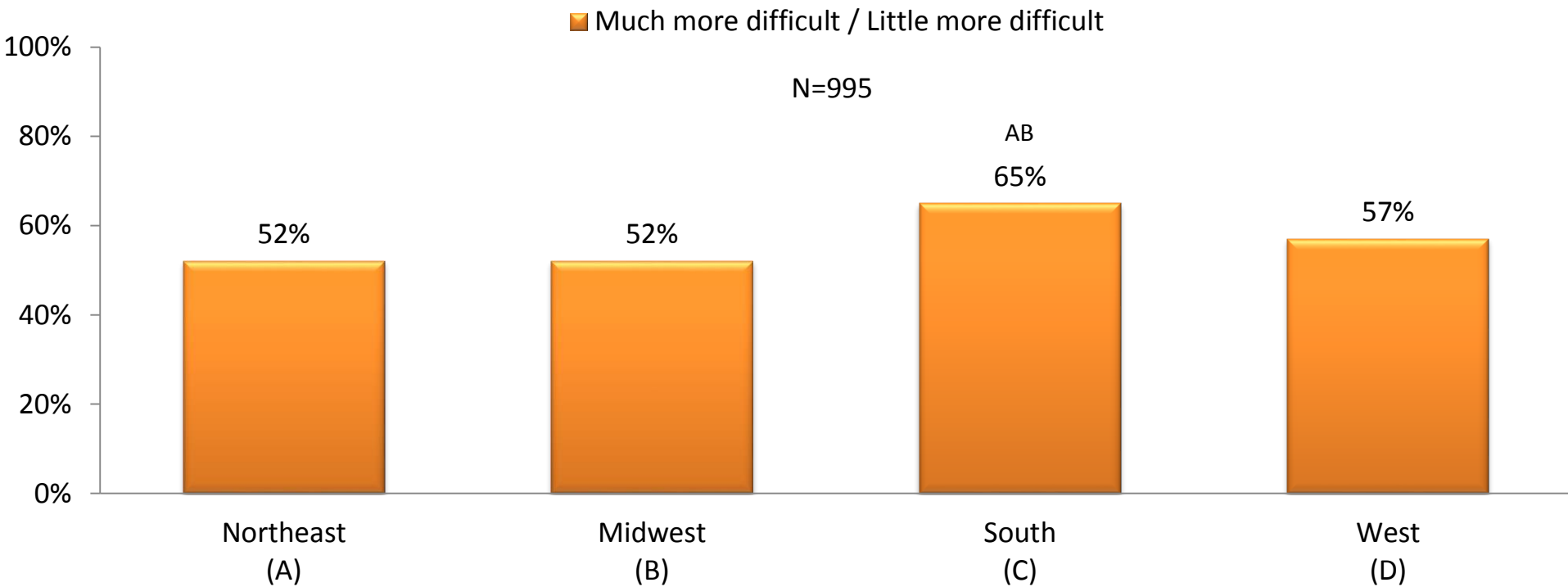
■ Driver retention is getting a little more difficult
■ Driver retention is getting a little easier



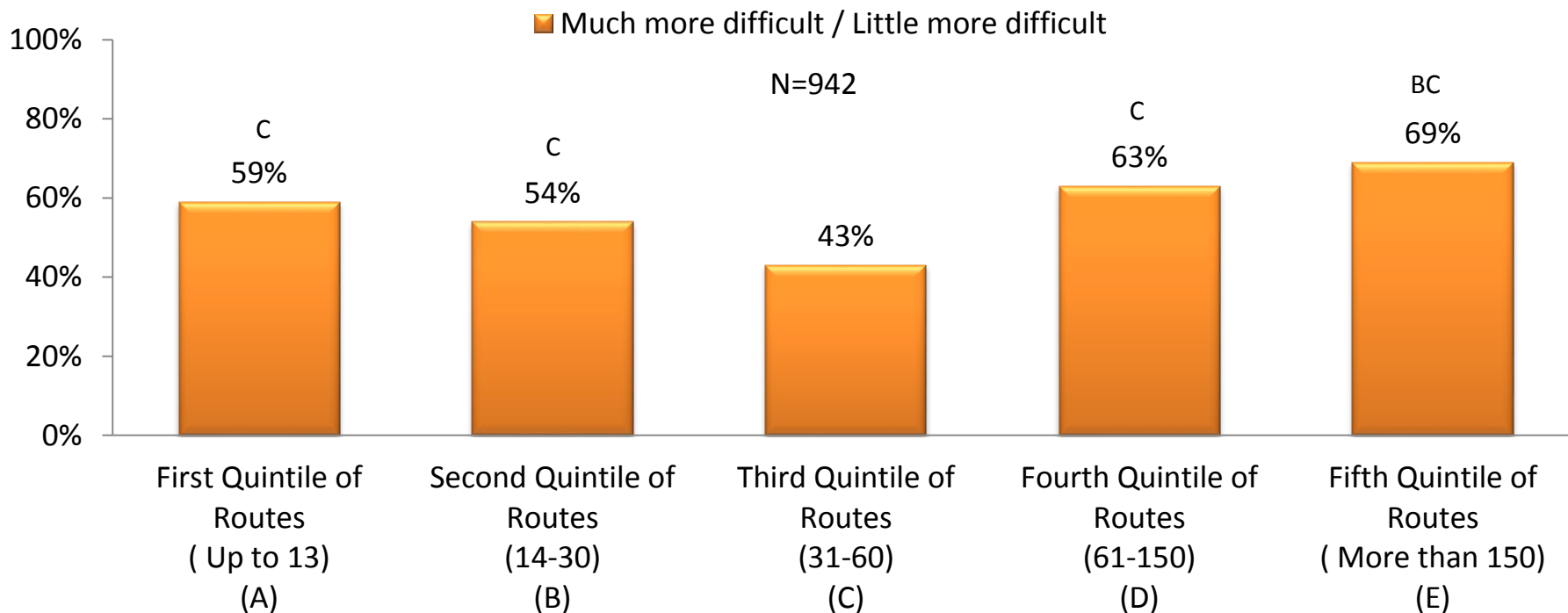
Trend in Driver Retention – Region

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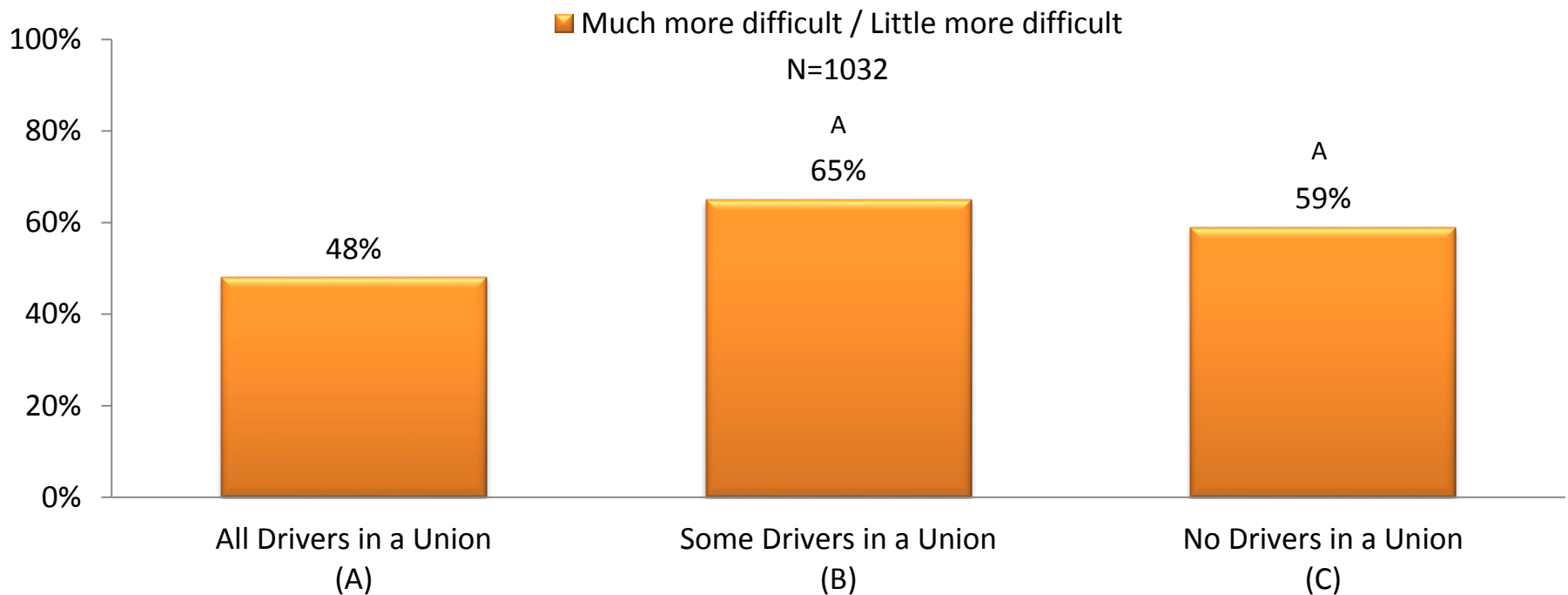
- A significantly larger percentage of respondents from the South region believe it is getting more difficult to retain drivers than respondents from the Northeast and Midwest regions.



- A smaller percentage of respondents whose company or school district covers 31-60 routes every am or pm believe that it is getting more difficult to retain drivers, compared to other respondents.



- Organizations whose drivers belong to a labor union are the most optimistic about the future of retaining school bus drivers.



- The chart below shows the percentage of respondents who offer the various types of financial incentives in order to retain their bus drivers.

