



## Intelligence Briefing

# European Driver Shortage Report 2022

Understanding the impact of transport  
shortages in the industry

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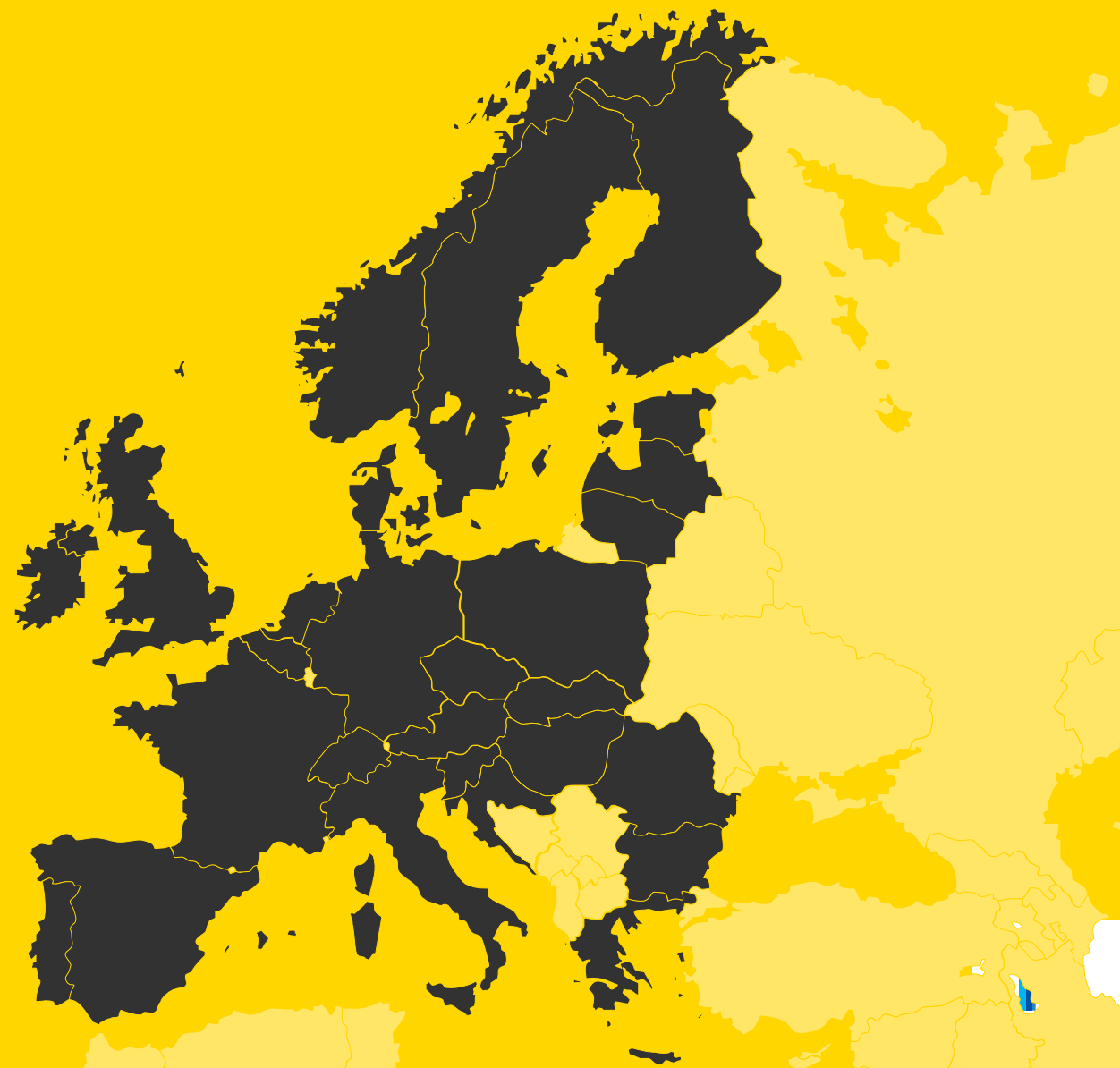
# Driver shortage is a chronic and serious global issue

Shortages affect passenger and goods transport operations, impacting the mobility of people and, in particular, logistics and global supply chains.

The impact of driver shortages is not only felt by transport operators and in the services they provide.

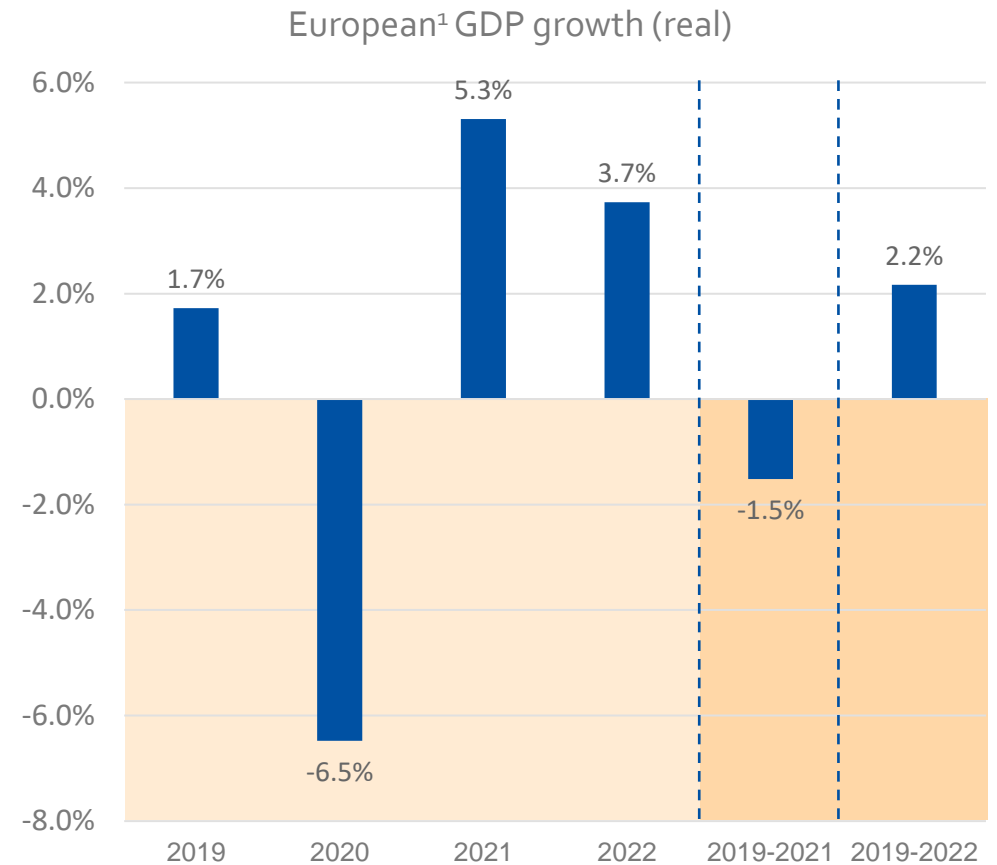
Knock-on effects ripple quickly throughout supply chains, affecting consumers and businesses.

# Europe



## European economy forecast to recover fully in 2022

- After a 6.5% decrease in 2020, real GDP strongly rebounded in 2021 (+5.3%) as confinement measures were gradually lifted, but remained 1.5% below 2019 levels.
- In 2022, economic growth will slow to 3.7% year-on-year. However, European GDP is forecasted to fully recover, ending the year with a 2.2% versus 2019.



## Strong rebound in 2021, slowing in 2022

Economic activity rebounded sharply in the first half of 2021, with growth remaining very dynamic in the third quarter.

The vaccination rollout, which started in December 2020, has gathered pace across Europe, with about 75% of the EU population having received at least one dose of vaccine by mid-November.

Private consumption, fuelled by pent-up demand and a rise in labour compensation, has been a key driver so far. This has helped to support the

recovery in service sectors, following that in manufacturing.

**However, growth slowed abruptly at the end of 2021 due to ongoing supply chain bottlenecks, with shortages of raw materials and sometimes of labour, a rise in energy prices, and a widespread increase in energy prices.**

These phenomena have also caused a surge in inflation. On an annual average, the latest forecasts from the European Commission predict inflation of 2.6% for the European Union in 2021, against 0.7% in 2020.

As headwinds ease, growth should strengthen in the second quarter of 2022.

The service-oriented economies in southern Europe should benefit from a rebound in tourism and travel-related activities in the third quarter.

Private consumption and investment will continue to benefit from the lifting of containment measures and buoyant household spending.

In 2022, unemployment is projected to be at pre-pandemic levels. However, higher inflation will put a lid on stronger growth. Activity will be further supported by strong export growth, boosted by the recovery in the rest of the world.

### Consumption is expected to shift back to services as restrictions are lifted and the hospitality sector recovers.

In most cases, expenditure for durable goods has been growing faster than that for nondurables since the end of 2019. The service consumption rebound is likely to happen at least partly at the expense of durable goods, such as electronics and furniture.

However, sectors such as motor vehicles, which suffered a strong decline in 2020 and held back production due to global semiconductor supply issue, are expected to recover and show strong growth numbers, especially toward the end of 2022 as supply constraints ease.



## Europe Key indicators – Freight



Road freight transport employees<sup>1</sup>

4M



Trucking revenues<sup>2</sup>

469B USD



Road freight companies<sup>1</sup>

602k



Truck drivers<sup>3</sup>

3M



Heavy trucks<sup>1</sup>

7M



Road trade volume<sup>1</sup>

16B tons

Sources:

1. Eurostat 2019

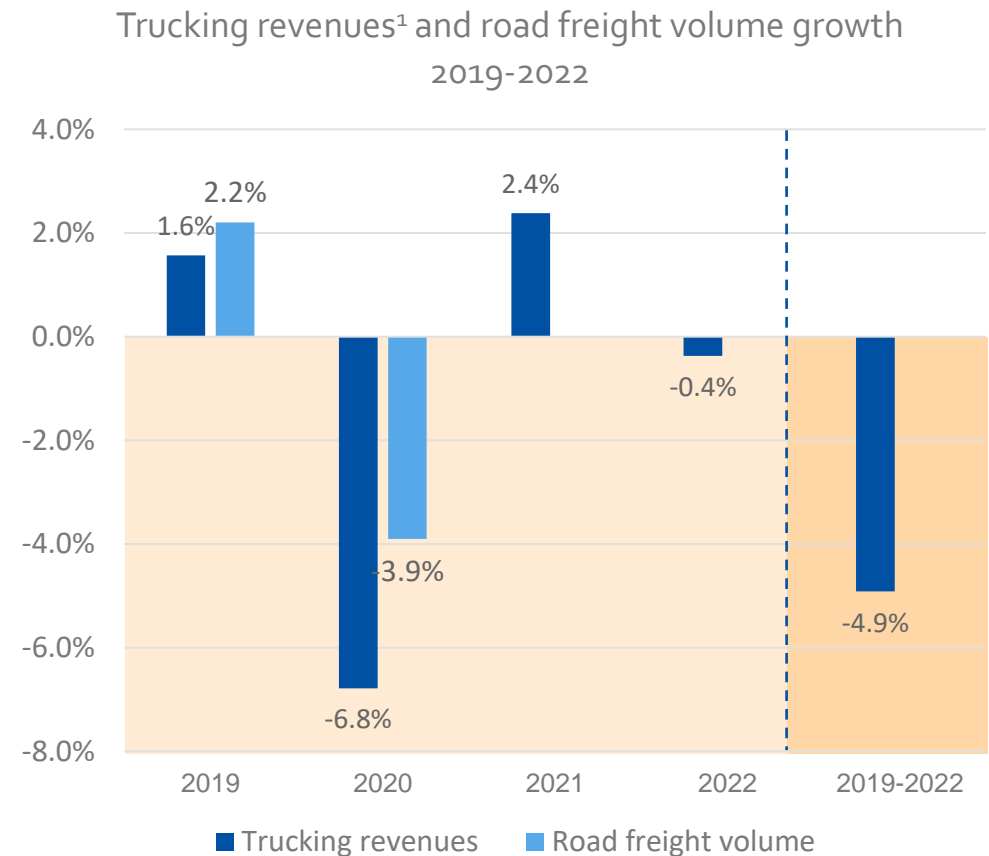
2. IHS Markit 2020

3. Scope of countries included: Belgium, Germany, Spain, Italy, France, United Kingdom, Poland, Romania, Lithuania, Netherlands



## European road freight transport industry still behind 2019 revenue level

- After a 6.8% decrease in 2020, trucking revenues grew by 2.4% in 2021, continuing the recovery that had begun in the second half of 2020.
- The massive support plans for the economy and businesses decided by the governments made it possible to avoid the wave of bankruptcies that professionals and observers of road freight transport had feared.
- In 2022, revenues are forecasted to suffer a slight contraction of 0.4% year-on-year, mainly due to **driver shortages, that are limiting industry growth**, as well as a switch in customer spending from products to services.
- European road freight transport failed to return to pre-pandemic levels in 2021, and will still remain 5% below 2019 revenues in 2022.



# Industry suffering from rising transport costs

In 2021, demand has exceeded supply, having repercussions on the entire supply chain and particularly on transport.

The scarcity of semiconductors, the sharp rise in fuel prices and the shortage of truck drivers, have had an inflationary influence on the prices of road freight transport in Europe. The Ti-Upply-IRU European Road Freight Rate Index benchmark reached 108.3 in the fourth quarter of 2021, its highest level since its inception in 2017.

**Diesel costs have risen sharply, and have been the main driver of transport costs increase for carriers.**

They account for one third of the total operating transport costs, but given the increase, they may now account for 50% of costs. According to the European Commission, diesel prices were up 23% in the European Union<sup>1</sup>.

**Driver shortage has also put upwards pressure on wages (which make up another third of transport costs), as employers try to remain competitive and keep their drivers.**

However, the cost increase varies in each country, and some will only feel the impact of driver wage increases in 2022. Although the CNR forecasts an increase in personnel costs between 4.5% and 7.2% in France in 2022, the country is not yet under pressure.

Sources : CNR, Transport Intelligence, Upply, IRU

1. European Commission weekly oil prices bulletin – average consumer price per liter (in euros) at pump of gas oil automobile inclusive of duties and taxes from 11 to 20 December 2021.

On the contrary, the United Kingdom has already witnessed the largest increases, with some companies offering pay rises of up to 15% to retain their drivers.

Driver costs could rise even further in 2022 as the new rules of the EC Mobility Package come into effect on 21 February 2022 for transport companies.

**Trucking companies have also suffered from the lack of vehicle resources.**

Truck manufacturers have struggled to produce enough trucks for road transportation providers globally, especially as there is a shortage of semiconductor chips that are crucial to various systems on trucks.

This has resulted in higher prices for new, and subsequently used trucks, as manufacturers have struggled to produce enough vehicles to satisfy the needs of European road freight companies. Such a situation is putting upwards pressure on ownership costs for commercial vehicles. It does not only concern trucks, but also tyres and semi-trailers.

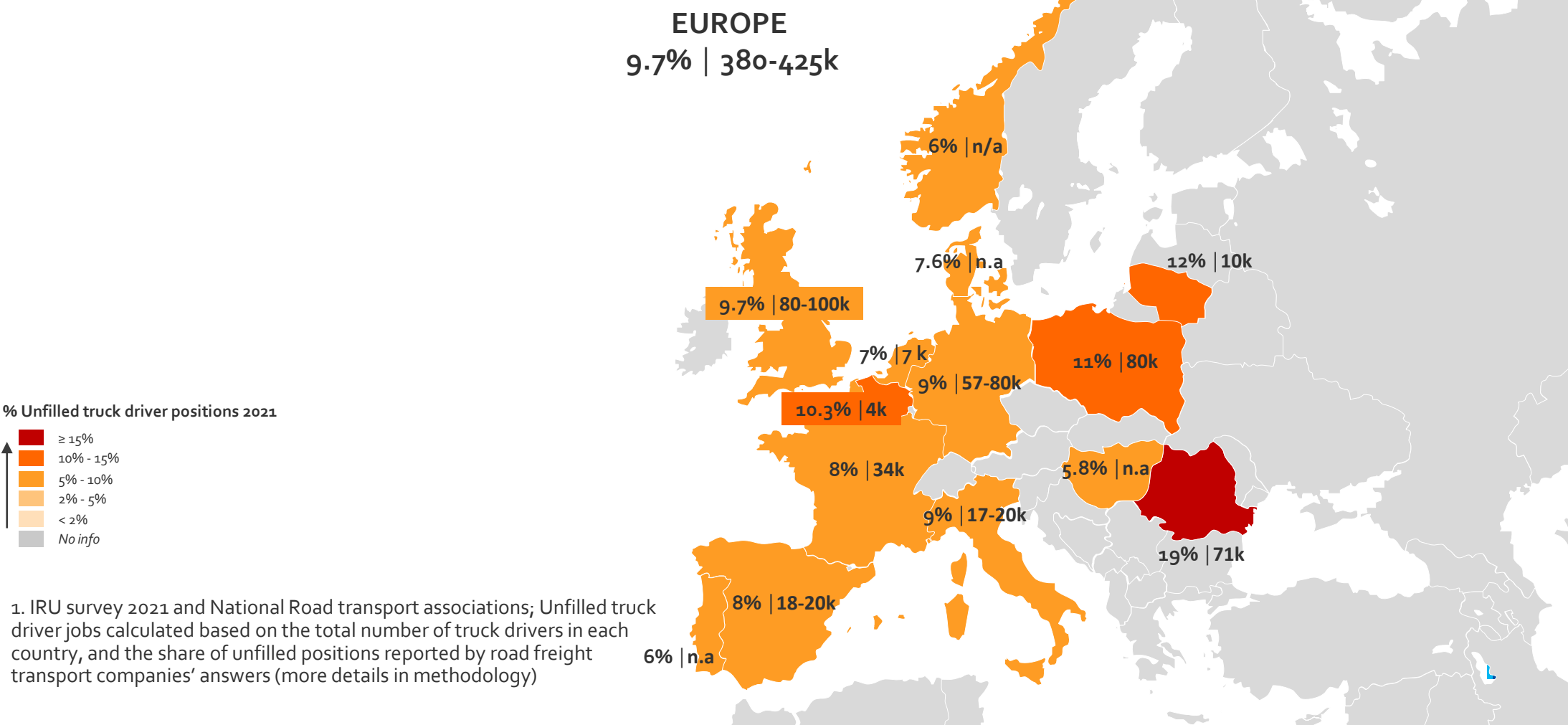
Sources : CNR, Transport Intelligence, Upplly, IRU

**Driver shortage**  
425,000 truck driver jobs were unfilled  
in 2021.

425k

# Increased truck driver shortage in 2021 across Europe

% of unfilled truck driver positions in 2021 | number of unfilled truck driver positions in 2021<sup>1</sup>

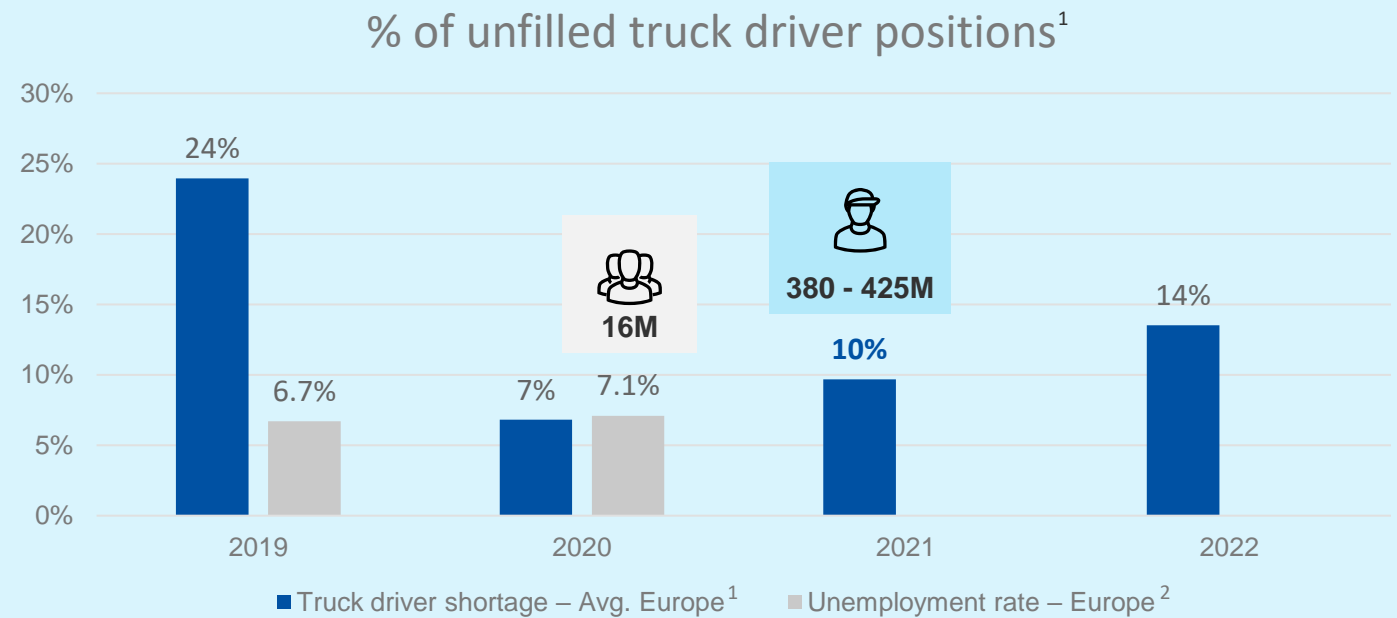


1. IRU survey 2021 and National Road transport associations; Unfilled truck driver jobs calculated based on the total number of truck drivers in each country, and the share of unfilled positions reported by road freight transport companies' answers (more details in methodology)

# Truck driver shortage

In Europe, 10% of truck driver positions were unfilled in 2021, representing between 380,000 and 425,000 driver vacancies.

The shortage of drivers is forecasted to increase further in 2022, reaching 14% of unfilled driver positions.



# Over 40% increase in truck driver shortage in 2021, expected to further increase in 2022

**In 2021, unfilled truck driver positions in Europe increased by 41% versus 2020.**

This was the result of increased transport demand, as well as the ageing population of the truck driver population, with a large share of drivers going to retirement that have not been replaced with enough new (young) drivers.

Driver shortage growth is expected to continue in 2022, with a 40% estimated increase in unfilled truck driver positions.

The increase of driver wages that has taken place in 2021 in some European countries (or is

expected to take place in 2022 in others) does not seem to have been very effective to improve the situation and attract more drivers. This can support the industry's statement on the fact that the lack of attractiveness of the profession is not (only) a matter of salaries, but rather working conditions.

**The 15 million unemployed people in Europe in 2020 could largely cover the 380,000-425,000-driver gap.**

Measures to improve the attractiveness of the driver profession could have an additional positive impact on unemployment, which was over 7% in 2020 in the region.



## Gender representation

**The share of female truck drivers in Europe is very low (3%) and has not improved over the last 3 years.**

It is also very far from the transportation industry benchmark (22% of women employees).

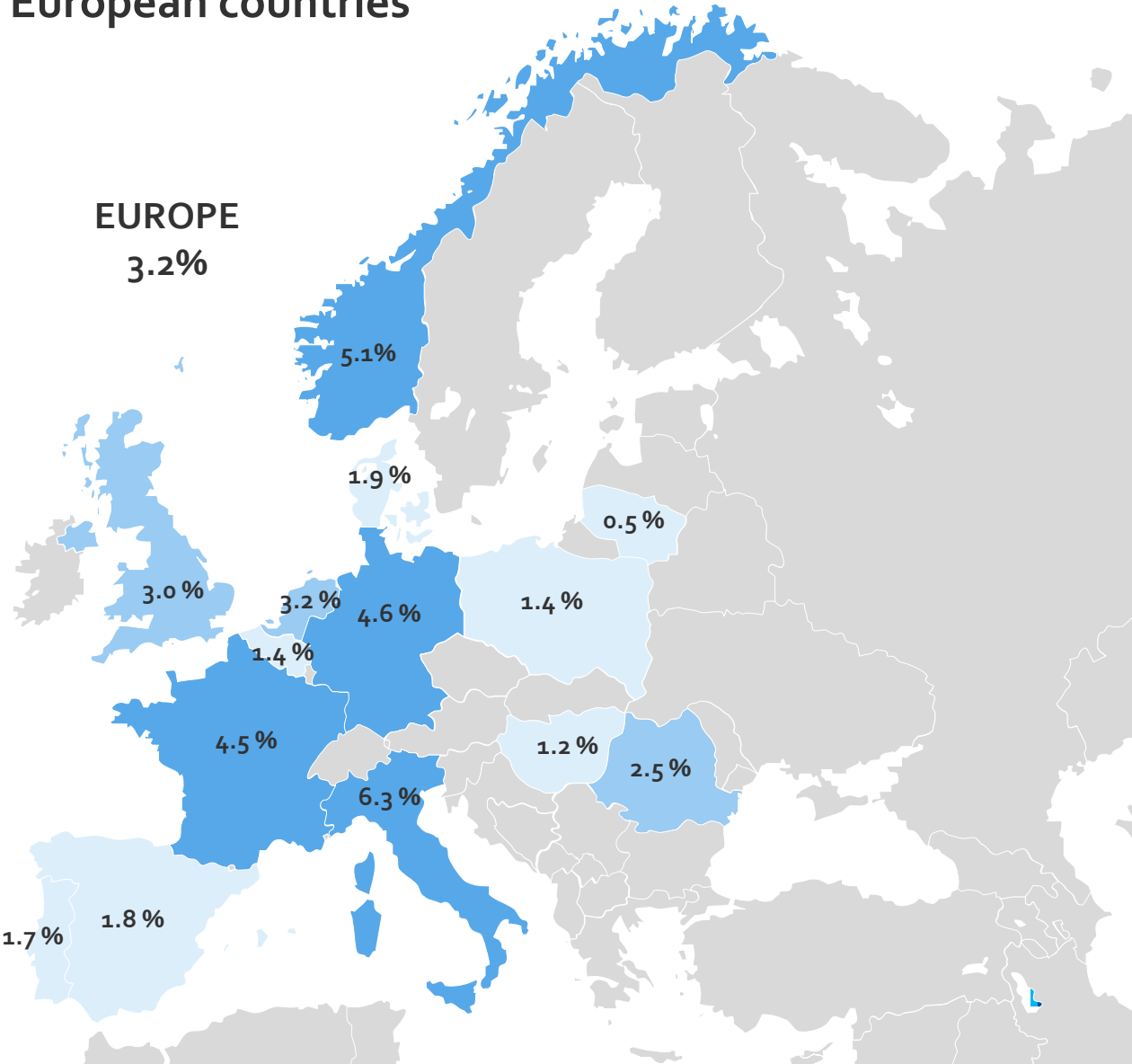
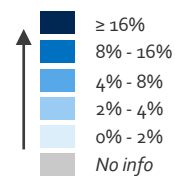
Lithuania has the lowest women representation (0.5%), while Italy (6%) and Norway (5%) boast the highest (even if the share is still very low).

3%

# Very few female truck drivers accross all European countries

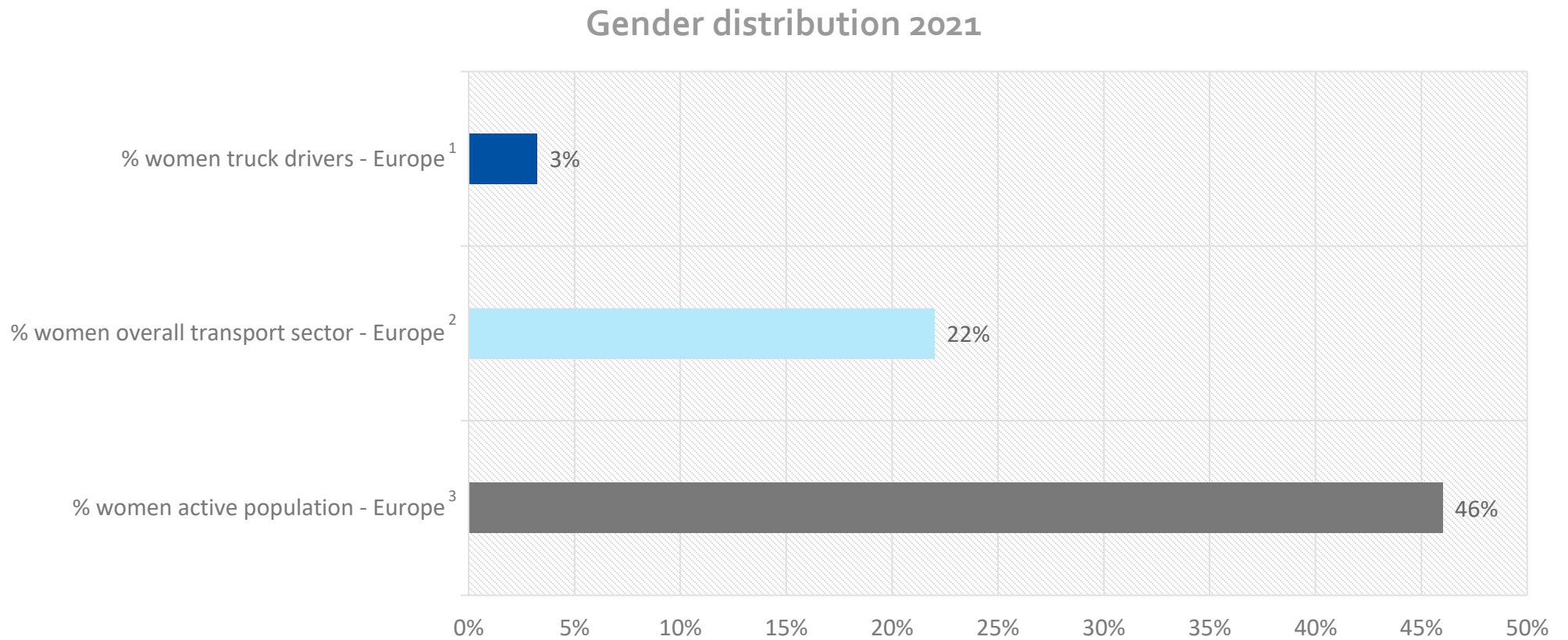
% of female truck drivers in 2021

% of female truck drivers in 2021



Source: IRU survey 2021

## Female truck driver representation far from overall transport industry benchmark



## Age distribution

**There are less than 7% young truck drivers under 25 years old in Europe.**

The Netherlands is the most successful country in attracting young people (13%), while the United Kingdom has the lowest proportion of drivers under 25 years old.

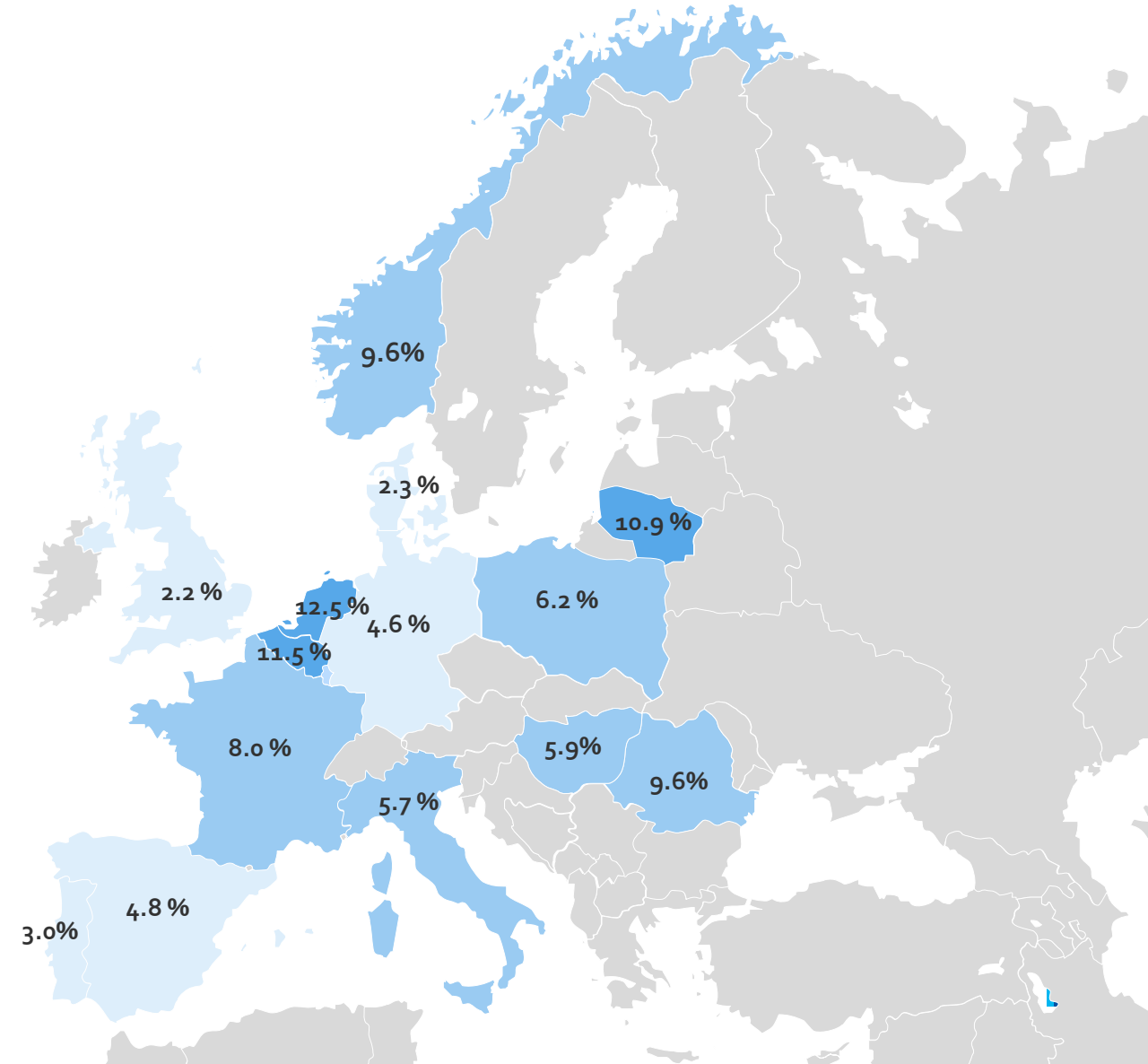
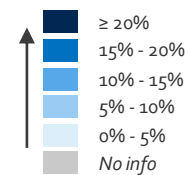
7%

## Attracting more young people remains a challenge despite high levels of youth unemployment

% of young truck drivers (< 25 years old) in 2021

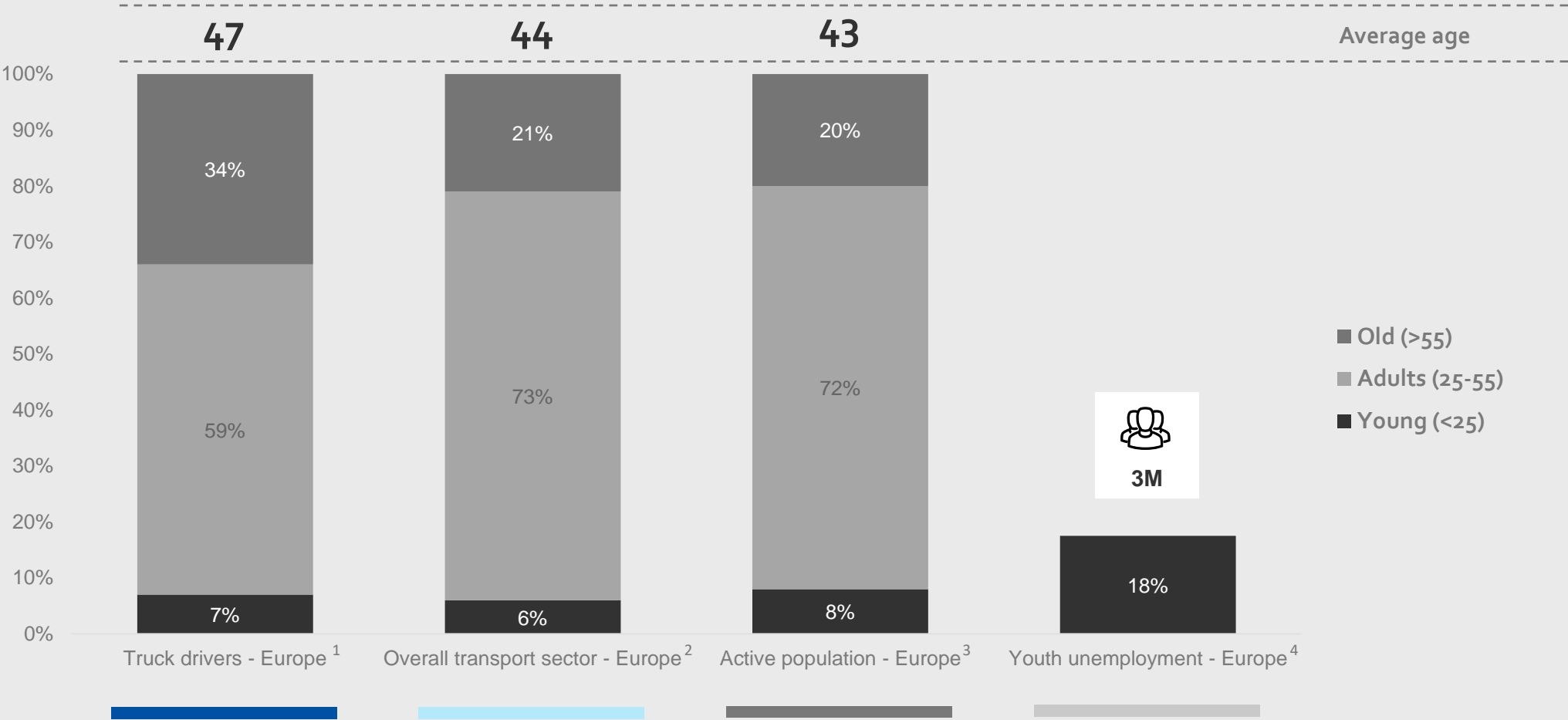
EUROPE  
7%

% of young truck drivers (< 25 years old)



Source: IRU survey 2021

Age distribution – 2021



1. IRU Survey 2021; 2. Eurostat 2020 (Transportation and storage); 3. Eurostat 2020); 4. Eurostat 2020

# Ageing truck driver workforce

The average age of Europe's truck driver population is 47 years old. It is the oldest truck driver population among all regions surveyed, and is also above the European transportation industry and active population benchmarks.

**On one hand, the region has a low share of young truck drivers (7%).**

This is partly due to the ageing of the European population: only 8% of the working population is below 25 years old, which means the trucking

industry is not performing that badly in attracting youth. It is even performing slightly better than the transportation industry (only 6% of transportation and storage employees are below 25 years old).

Another reason is the low attractiveness of the profession. There is more than one reason for it, but one of them is the difficulty to access the profession, and in particular, **the required minimum age. It is 18 years old in some European countries, but goes up to 21 years old in others.**

This means young people have to wait at least 3 years between the end of their studies (18 years old if vocational truck driver training exists) and the moment they can become truck drivers (21 years old).

Additionally, in most countries, practical driving lessons cannot be started before 18 years old, which is also a discouraging factor for youth as they cannot start driving during their vocational training (if the latter exists).

Finally, given the high level of youth unemployment in the region (18%,

1. Certificate of Professional Training.



but well over 30% in some European countries), attracting more young people should be easy. Measures to improve the attractiveness of the profession could be beneficial both for the industry and to reduce unemployment.

**On the other hand, there is a large proportion of old drivers close to retirement (34% are above 55 years old).**

Again, this is partly due to the ageing of the overall European population: 20% of the European working

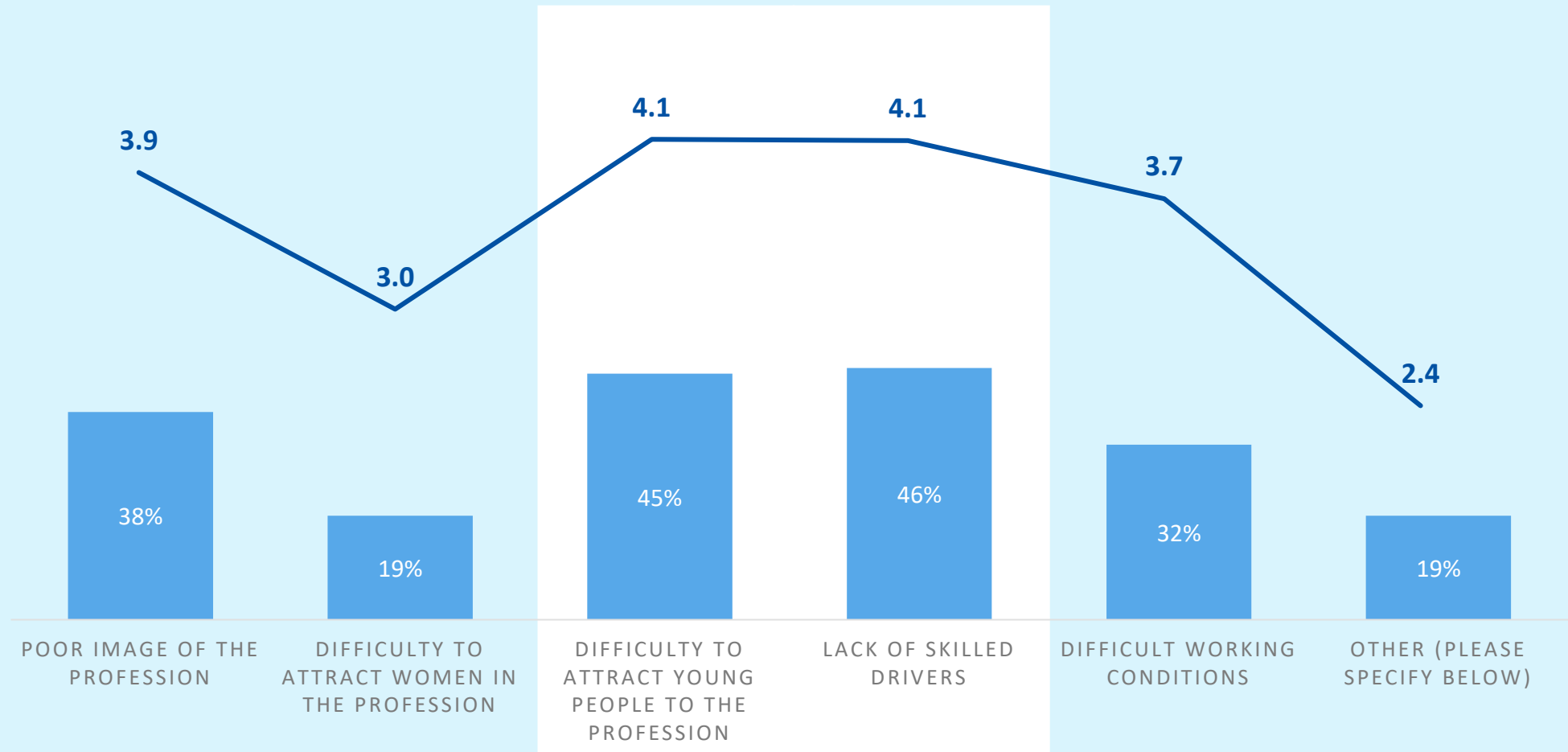
population is over 55 years old, second only to the United States in terms of ageing population (among regions/countries surveyed).

However, the share of old truck drivers is significantly higher than the transportation industry workforce and working population benchmark.

**The share of young drivers is too low to replace the significant amount of truck drivers that will retire in the next 10 years.**

**Higher shortages are to be expected in the coming years if no action is taken to attract more drivers.**

## Main reasons explaining driver shortage (according to operators)<sup>1</sup>

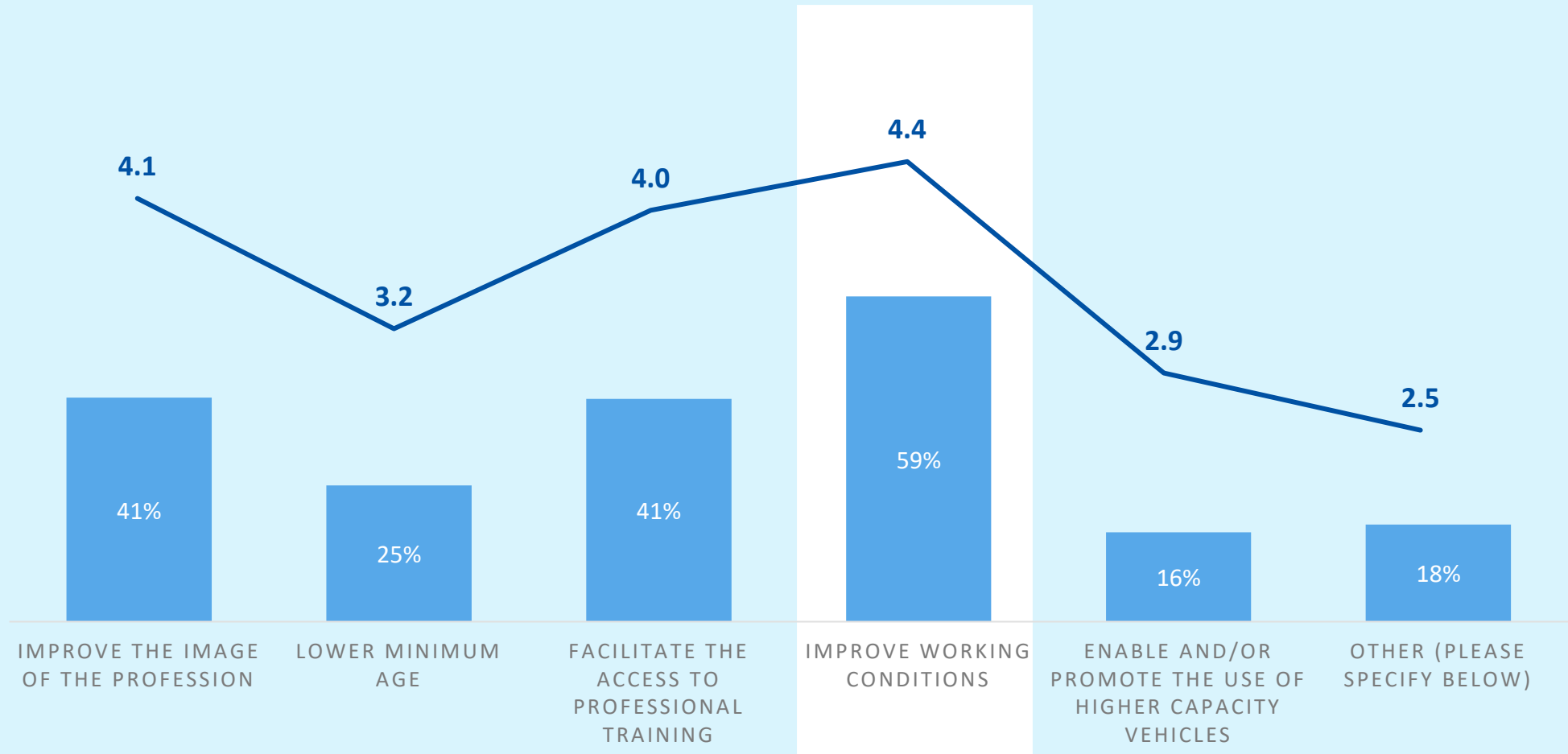


1. IRU survey 2021

■ % respondents ranking the reason as top 1 or top 2 by importance (ranking = 6 or 5)

— Average ranking (6 = most important)

## Main measures to be taken by governments to address driver shortage (according to operators)<sup>1</sup>



1. IRU survey 2021

■ % respondents ranking the reason as top 1 or top 2 by importance (ranking = 6 or 5)

— Average ranking (6 = most important)

# Lack of skilled drivers still a major factor of driver shortage

European operators consider the lack of skilled drivers to be the main reason explaining the driver shortage they are suffering.

However, it is closely followed by the difficulties to attract young people to the profession. This is not surprising, given the current number of truck drivers close to retirement and the low proportion of young drivers to replace them, which widens the driver shortage gap every year.

**Concerning the measures that should be prioritised to address the shortage, the improvement of working conditions for drivers is considered by far the most needed measure.**

In this respect, the key issues that should be addressed are the lack of sufficient secure and well equipped rest zones (showers, separate toilets for men and women, healthy food, and safe sleeping zones) and the treatment of drivers at loading and unloading sites (lack of toilets for driver use, long waiting times, loading and unloading operations to be carried out by the driver, together with pallet handling).

## Europe

# Key indicators – Passenger



Road passenger transport employees<sup>1</sup>

2.2M



Passenger revenues<sup>2</sup>

166 USD



Road passenger companies<sup>2</sup>

422k



Bus and Coach drivers<sup>3</sup>

234k



Buses and  
Coaches<sup>1</sup>

789k



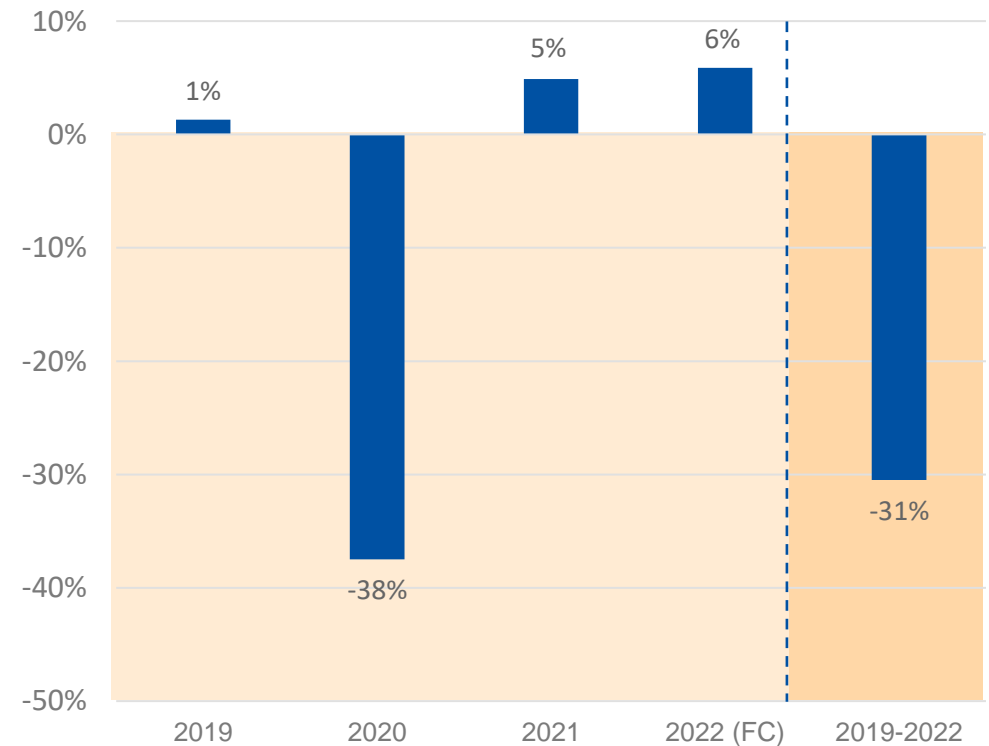
Passengers transported<sup>4</sup>

0.5B

## European road passenger transport industry far from recovery

- The revenues of the travel agency and tour operator industry (which can be taken as an indicator of the evolution of tourism related services, including long-distance bus and coach and occasional services) rebounded by 4.9% in 2021 after plummeting by 38% in 2020.
- In 2022, revenue growth is forecasted to accelerate slightly (+5.9%). However, the road to recovery is still long and uncertain, and the sector is lagging behind compared to others. Industry revenues will end the year still far from full recovery (31% below 2019 level).

Travel agency and tour operator<sup>1</sup> industry  
turnover real growth 2019 – 2022



# The longer the travel distance, the longer the recovery

**The COVID-19 pandemic has strongly affected mobility, as governments limited mobility operations to limit contagion.**

Urban and short-distance transport (including special services like school transport and transport for workers) was heavily affected during lockdowns, but also because of a change in mobility behaviours linked to the fear of contagion or increased telework. According to the International Association of Public Transport (UITP), European public transport farebox revenue sank by over 90% in 2020. This income contraction was compensated, in most cases, by national authorities, which guaranteed coverage of the losses.

By summer 2021, ridership levels in Europe had recovered to approximately 60-70% of pre-COVID levels, but UITP expects that passenger numbers will still not reach the level of 2019 in 2022.

The longer the distance, the stronger the COVID-19 impact and the longer the recovery also. Urban transport has been the least impacted transport segment, and the one where recovery is the quickest.

**On the other side, occasional bus transport was the segment most impacted by the pandemic, closely followed by international long-distance transport.**

Sources: IHS Markit, United Nations World Tourism Organization (UNWTO), IRU members



# At sector level, tourism was the sector most affected by the COVID-19 pandemic

In 2020-21, the COVID-19 pandemic caused an **unprecedented disruption to tourism, resulting in a massive drop in international travel**. This followed national lockdowns and plummeting demand amid widespread travel restrictions to contain the spread of the coronavirus. Until May 2021, there were severe mobility restrictions in many countries limiting mobility operations across countries and even regions within each country, with travel bans and/or capacity restrictions.

Travel agency and tour operator services turnover slightly rebounded by 4% in 2020. The return of domestic tourism in some markets and a moderate surge in international travel during the summer

season explain this modest improvement.

- Domestic travel contributed to a greater extent, given its size and faster recovery. It was driven by large pent-up demand and a preference for shorter trips and destinations closer to home, often in rural and coastal settings, as well as by restrictions still in place for international travel.
- A small improvement in international travel also helped, underpinned by growing vaccination rates and the lifting of restrictions in many destinations, even if the emergence of the Delta variant, which coincided with the summer holiday season, heavily impacted revenues in 2021.

Sources: IHS Markit, United Nations World Tourism Organization (UNWTO), IRU members

# Growth expected to accelerate in 2022, but road to recovery is still long and uncertain

Travel agency and tour operator services revenues are expected to grow slightly faster in 2022, to 5% year-on-year. However, the road to recovery is still long and uncertain, and the sector is lagging behind compared to others.

Many challenges remain, such as the spread of new coronavirus variants, uneven vaccination rates and the economic strain caused by the pandemic, aggravated in some cases by the recent spike in oil prices.

Travel agency and tour operator services revenues are expected to remain far from recovery at the end of 2022 (31% below pre-pandemic levels).

# Driver shortage

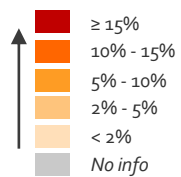
**7% of bus and coach driver jobs were unfilled in 2021.**

7%

## Driver shortage before demand recovers from pandemic

% of unfilled bus and coach driver positions in 2021 | number of unfilled bus and coach driver positions in 2021 <sup>1</sup>

% of unfilled bus and coach driver driver positions 2021



EUROPE  
6.7% | > 17k

1.2% | n.a

8.4% | n.a

7.2% | > 4k

5.5% | > 2.3k

6.9% | > 6.7k

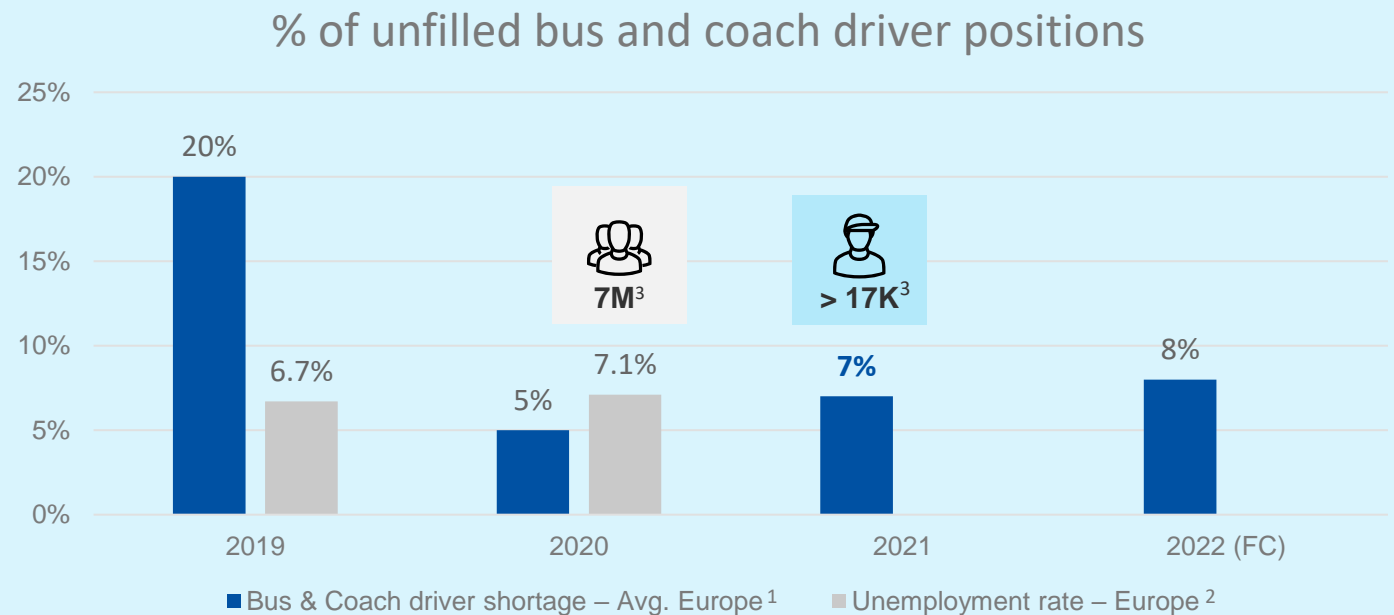
Source: 1.IRU survey 2021 and National Road transport associations; Unfilled bus and coach driver jobs calculated based on the total number of bus and coach drivers in each country, and the share of unfilled positions reported by road passenger transport companies' answers (more details in methodology)

# Increasing bus and coach driver shortage

In 2021, 7% of bus and coach driver jobs were unfilled.

In the scope of countries studied<sup>3</sup>, this represented more than 17,000 jobs.

The shortage is forecasted to increase by 23% next year, reaching 8% of unfilled driver jobs.



# Increasing shortages as demand recovers

**In Europe, driver shortage is steadily increasing, but is still expected to remain far from pre-pandemic levels in 2022.**

The driver shortage increased from 5% to 7% in 2021, and is expected to reach 8% in 2022 .

This is the result of the increased demand expected for 2022 as mobility restrictions ease, and the decrease of existing drivers due to:

- Bus and coach drivers changing profession as the activity lost in the pandemic will not return

- Less young drivers being trained and accessing the profession, because of low activity, restrictions limiting training capacity, and the already low attractiveness of the profession
- Retiring old drivers who are not completely replaced with new entrants

There was a 7% unemployment rate in Europe in 2020, representing more than 15 million people, and 7 million in the scope of countries studied. This available workforce could largely cover the existing driver gap.

# Gender representation

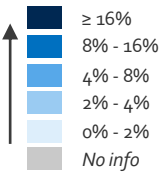
Less than 12% of bus and coach drivers are women in Europe.



# 2021 share of female bus and coach drivers in Europe lower than 2020 (16%)

% of female bus and coach drivers in 2021

% of female bus and coach drivers in 2021



Source: IRU survey 2021

EUROPE  
11.9%

22.3%

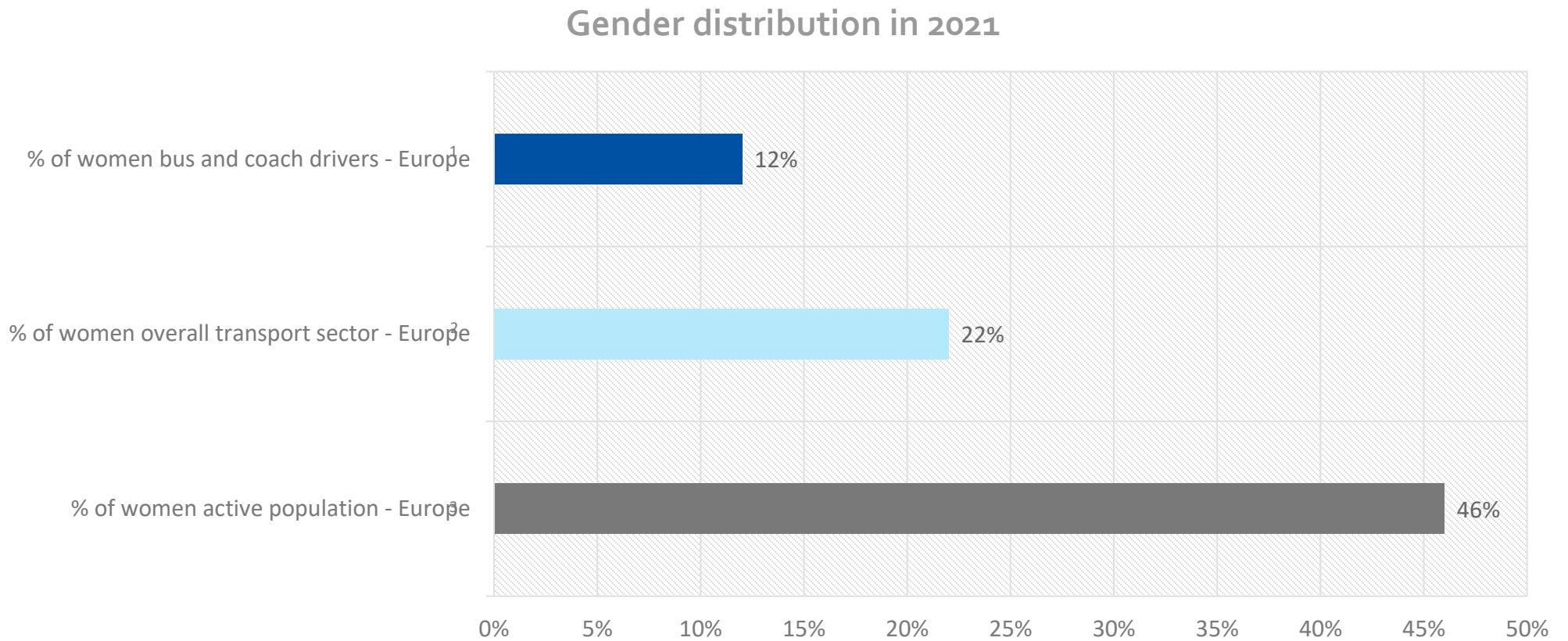
12.9%

7.4%

12.3%

9.9%

## Female bus and coach driver representation far from overall transport industry benchmark



## Low share of women bus and coach drivers

**Female representation in the bus and coach industry is low (12%), especially when compared to the transportation industry benchmark (12% versus 22%). It has also decreased compared to last year (16%).**

Attracting more women into the industry would be a powerful means to cover the existing driver shortage gap.

Among the countries surveyed, Denmark has the highest women representation, with an encouraging 22% of women bus and coach drivers. Italy, on the other hand, has the lowest share of women (7%).

Female representation in the bus and coach segment is significantly higher than in the trucking segment (3%) for known reasons. Mainly, these are:

- the shorter distances driven (especially in the case of urban transport and occasional transport) that allow a better work-life balance
- the better working conditions (i.e no loading/unloading procedures, not suffering from the lack of safe and secure parking areas, etc.)

1. Eurostat 2020 – share of volume transported internationally by road (tons) in Lithuania (loaded)

## Age distribution

**Only 3% of bus and coach drivers are under 25 years old in Europe.**

Among all countries surveyed, Denmark has the highest representation of young drivers (4%), even if it is still very low.

Italy, on the contrary, has the lowest share of drivers below 25 years old.

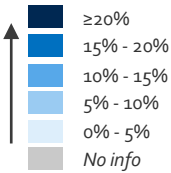
3%

# Attracting more young people remains a challenge despite high levels of youth unemployment

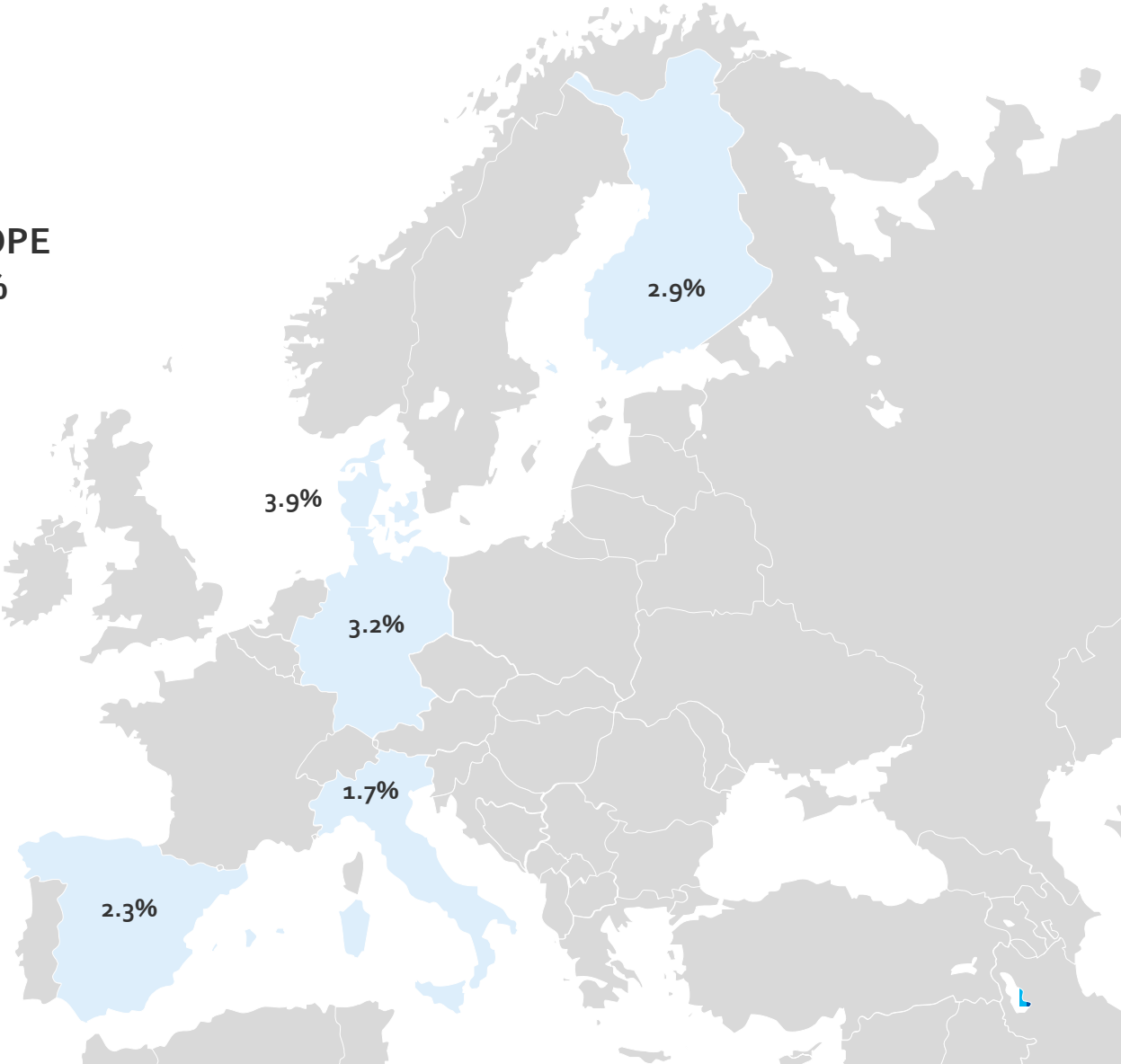
% of young bus and coach drivers (< 25 years old) in 2021

EUROPE  
3%

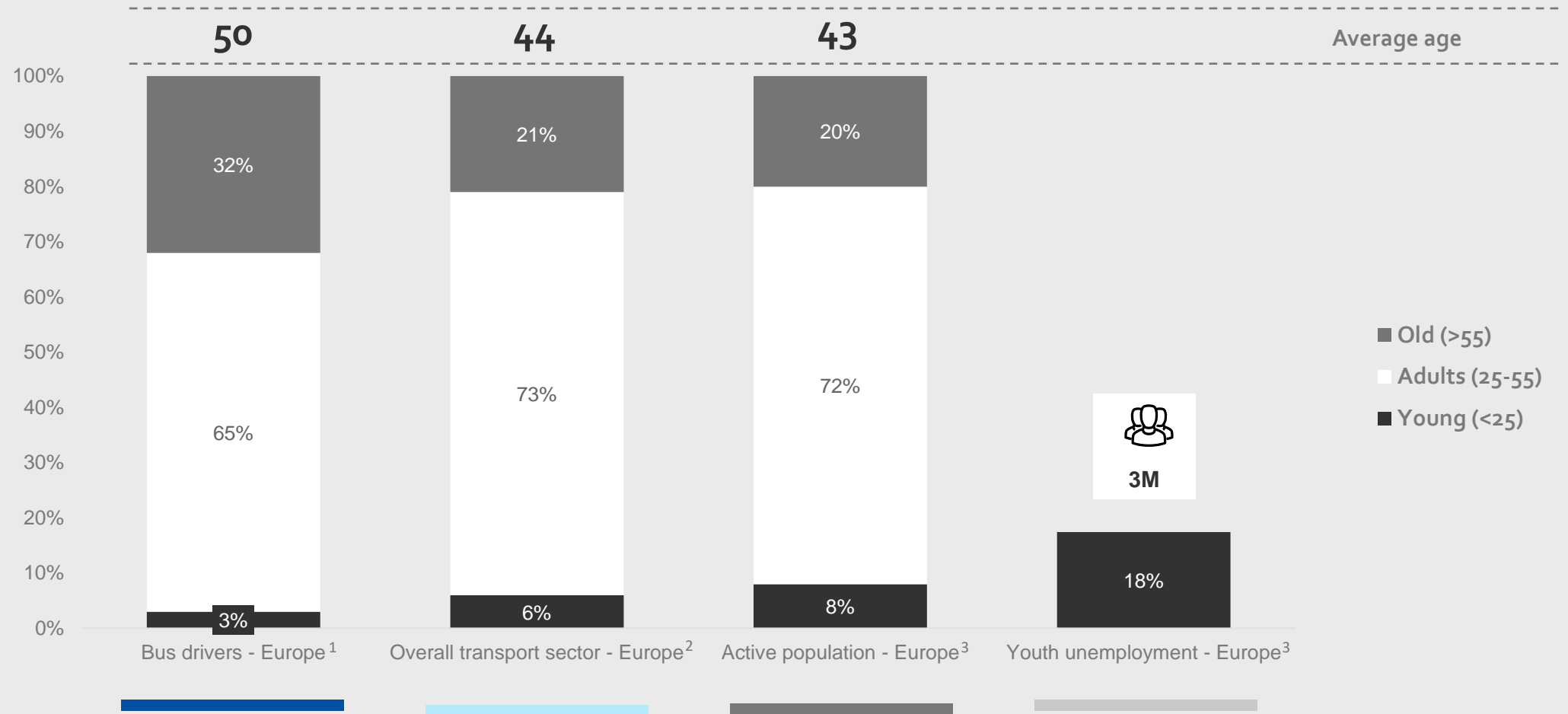
% of young bus and coach drivers (< 25 years old) in 2021



Source: IRU survey 2021



## Age distribution – 2021



1. IRU Survey 2021; 2. Eurostat 2020 (Transportation and storage); 3. Eurostat 2020 (EU-27 + Norway and Switzerland)

# Bus and coach driver profession: a means to address youth unemployment

In Europe, the share of young people in the bus and coach driver population is very low (3%).

One of the main reasons for this is the **ageing population** (in the active population, only 8% are below 25 years old). However, the bus and coach driver profession is still attracting less young people than the transportation industry (6%) and overall employment market (8%), so there is still room for improvement.

Another factor is the **minimum legal age** to access the bus and coach driver profession, which goes up to 21 and even 24 years old in some European countries. This makes it harder to attract young people, as it creates a gap between the end of studies and the time they can

can become professional drivers and start driving.

Attracting more young people to the driver profession would also be a means to address youth unemployment, which is 18% in Europe, and well over 30% in some European countries (38% in Spain).

**On the other hand, Europe also has a high share of old drivers over 55 years old (32%), and the average age of the driver workforce is 50 years old.**

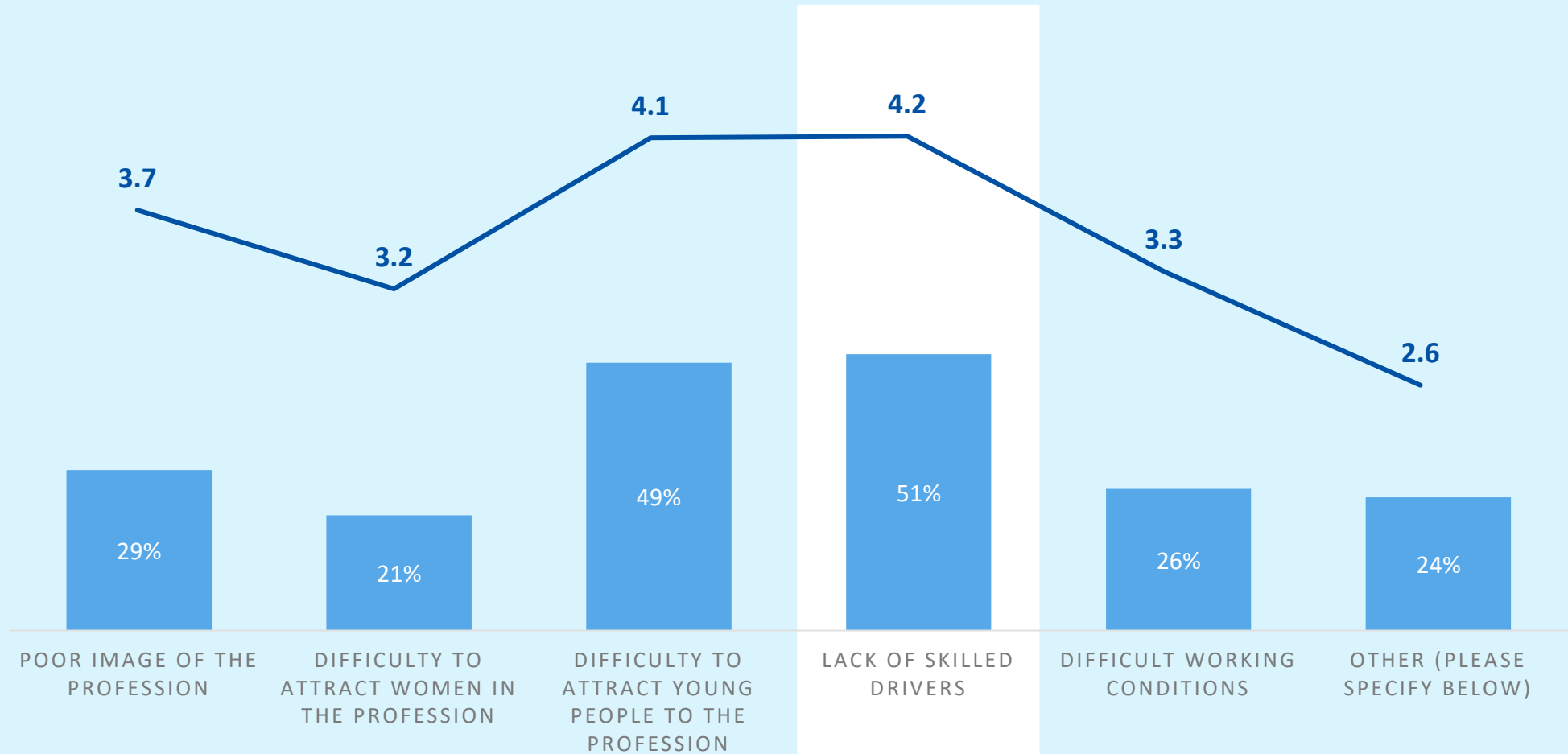
Again, this is partly explained by the general ageing of European population (in the active population, 20% of employees are above 55 years old), but the truck driver workforce is still clearly much older than the active population.

The share of bus and coach drivers over 55 is also higher than the overall transportation employees benchmark (21%).

With few young drivers in the profession, a high proportion of drivers approaching retirement in less than 10 years, and the progressive recovery of passenger transport demand, driver shortage can only become worse in the coming years if no action is taken.



## Main reasons explaining driver shortage (according to operators)<sup>1</sup>

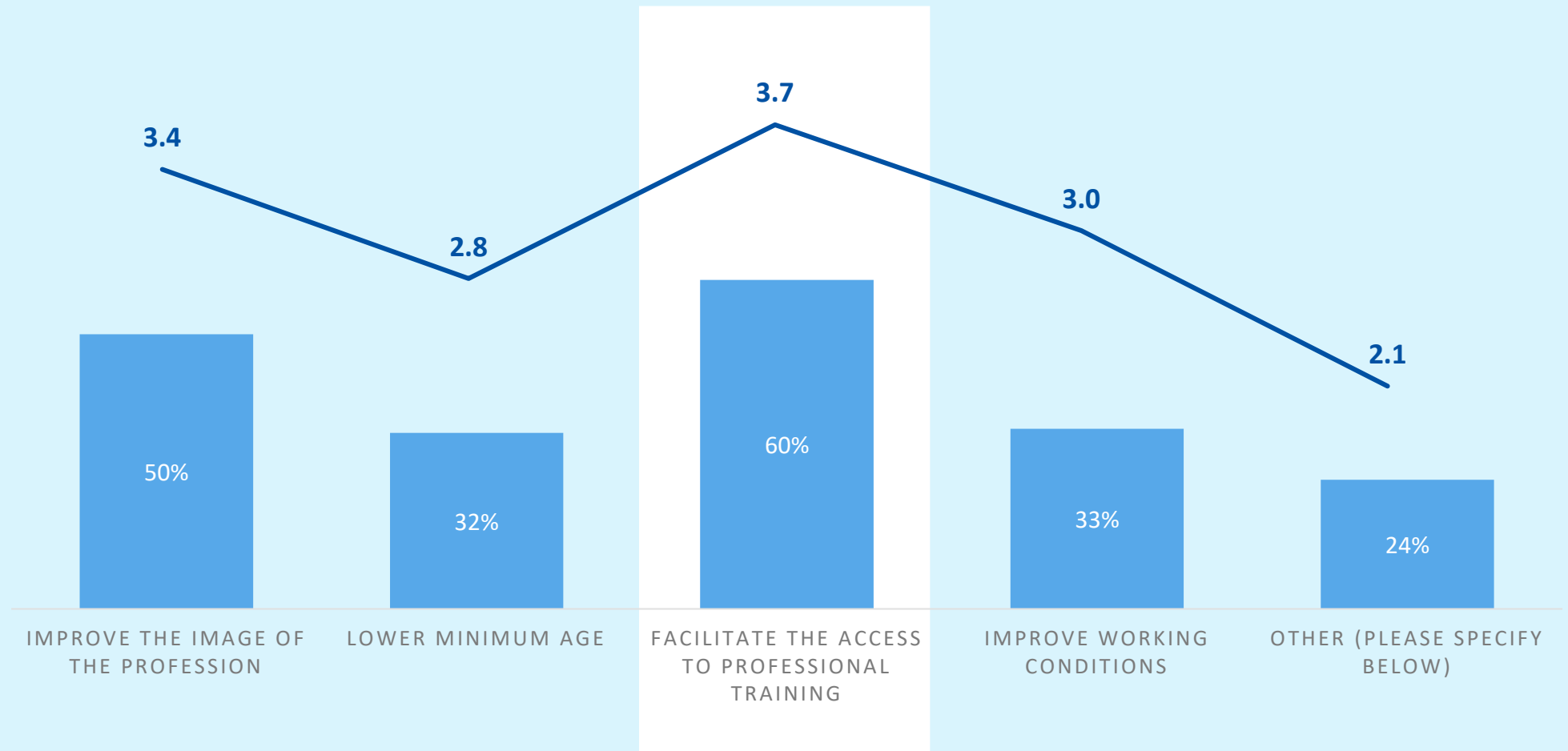


1. IRU survey 2021

■ % respondents ranking the reason as top 1 or top 2 by importance (ranking = 6 or 5)

— Average ranking (6 = most important)

## Main measures to be taken by governments to address driver shortage (according to operators)<sup>1</sup>



1. IRU survey 2021

■ % respondents ranking the reason as top 1 or top 2 by importance (ranking = 6 or 5)

— Average ranking (6 = most important)

# Lack of skilled drivers considered the main reason for driver shortage

In Europe, the operators surveyed consider that the shortage of bus and coach drivers is due to the lack of skilled drivers in the first place, followed by the difficulties to attract young people to the profession.

Many companies consider that new inexperienced drivers who have just obtained their license and CPC are not sufficiently trained and skilled. They are sometimes reluctant to hire inexperienced drivers because they would need to invest in further training.

**Consequently, they consider that governments should prioritise measures aiming to facilitate the access to professional training.**

In fact, the cost of access to the bus and coach profession (training, license, driver qualification) is often mentioned as a barrier for new entrants, especially for young people.