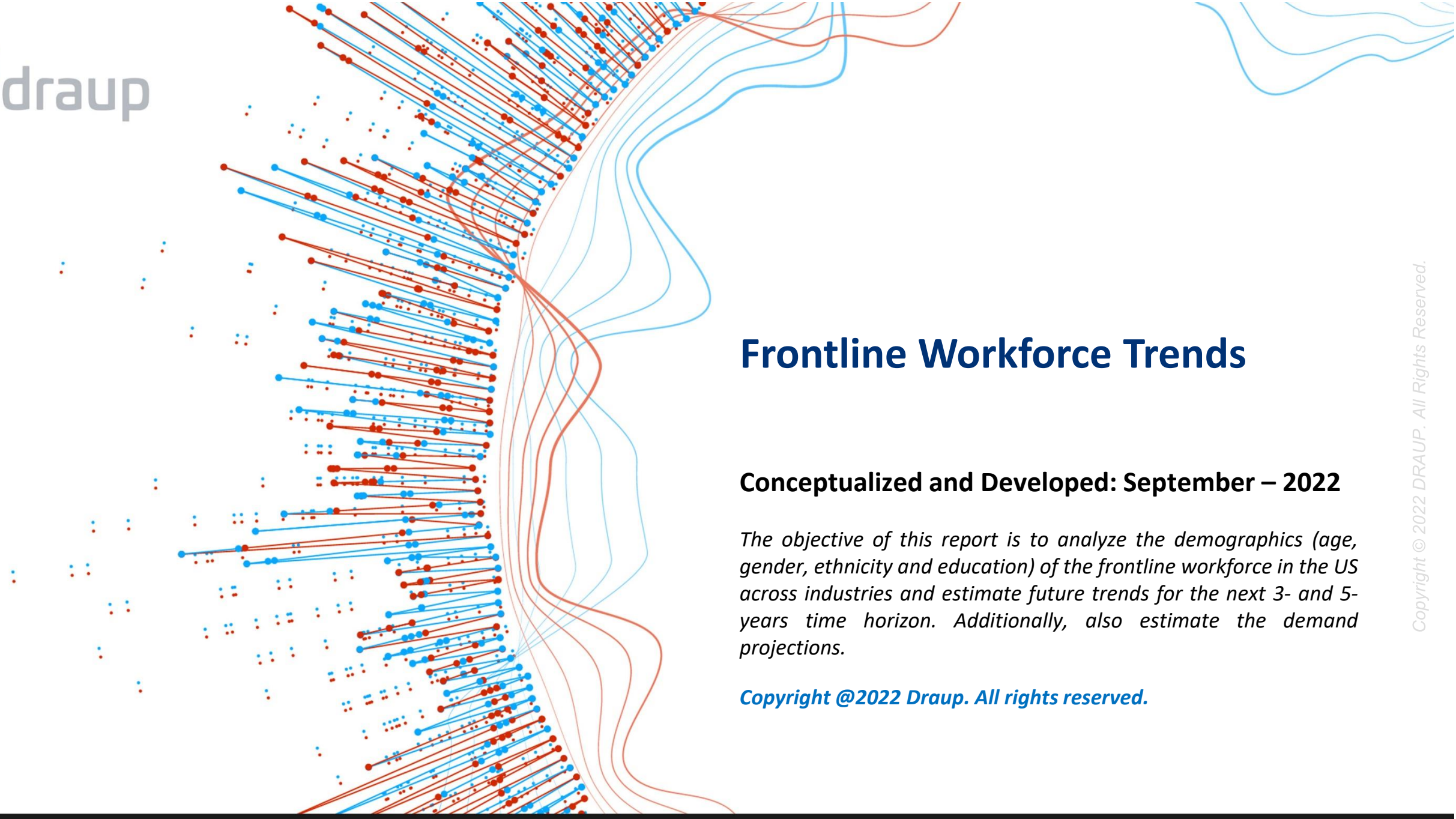

Frontline Workforce Trends

Conceptualized and Developed: September – 2022

The objective of this report is to analyze the demographics (age, gender, ethnicity and education) of the frontline workforce in the US across industries and estimate future trends for the next 3- and 5-years time horizon. Additionally, also estimate the demand projections.

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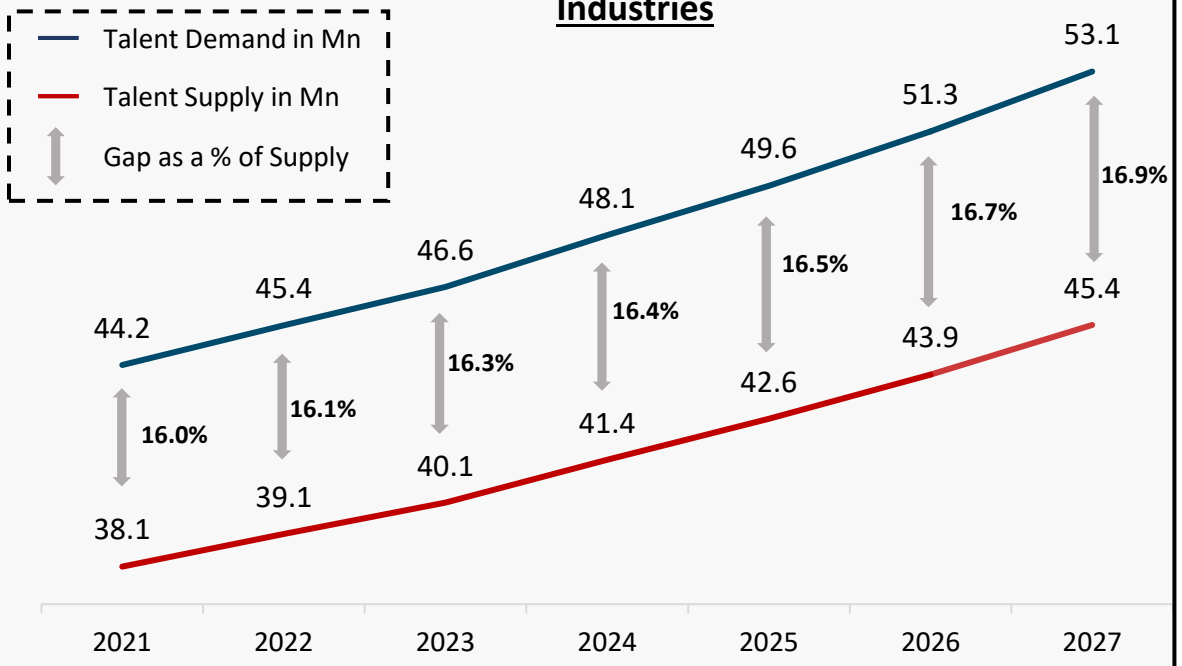
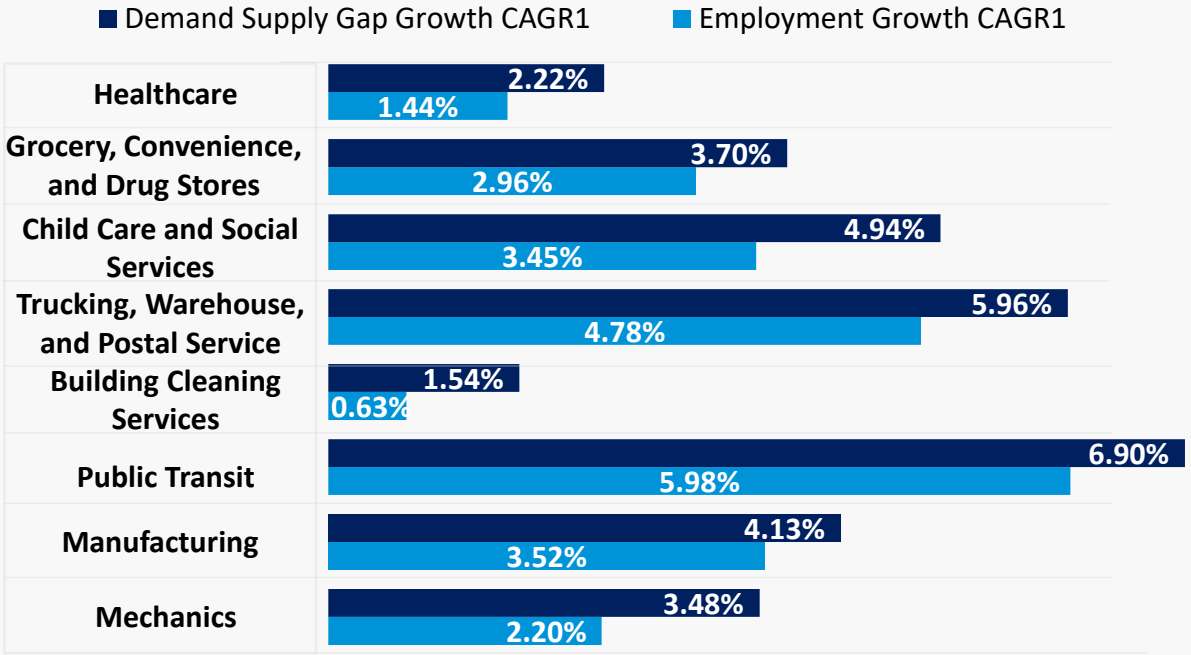
Frontline Workforce Demand Supply Gap: Demand is expected to increase at a faster rate than the supply thus the demand-supply gap is expected to go on increasing over the years

Workforce Demand-Supply Gap (In Mn) – major Frontline Industries



Trend in workforce Demand-Supply Gap across major industries



The US has managed to maintain the Overall Demand Supply Gap fairly constant, but certain sectors have a higher demand-supply gap which can be observed when analysed individually

Scenario of demand-supply gap in major industries

Child Care and Social Services and Healthcare are the sectors with **high dependance on low skill labor force** and hence has seen **enormous increase in gap**.

The **growth** in **Demand Supply Gap** for **Building Cleaning Services** is expected to be **slower** than that across other sectors.

Manufacturing industry has managed to **bridge the demand-supply gap** significantly better.

With the rapid pace of automation in Mechanics occupation, there is a huge shortage of relevant skills among the available workforce, leading to increase in demand-supply gap.

Note:. [1]CAGR is for the period 2021-27

Source: The demand and supply analysis has been conducted using employment and job vacancies data from Draup's Proprietary Model and BLS (Bureau of Labor Statistics - USA).

Source: Draup

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Frontline Industry Overview: Frontline workers in the Public Transit industry have the most matured (46%) workers in 50+ age group; Female are particularly overrepresented (85%) in Child Care and Social Services frontline industry; Mechanic frontline workforce is male dominant involving a high percentage of men (96%) compared to other industries

	Total Frontline Workers	Female%	Age Split (20-30 Yrs. | 31-50 Yrs. | 50+ Yrs.)
All Frontline Industries	38.1 M	56%	21% | 45% | 34%
Health Care	16.1 M	77%	22% | 44% | 34%
Grocery, Convenience, and Drug Stores	6.8 M	51%	21% | 52% | 27%
Manufacturing	3.9 M	26%	29% | 41% | 30%
Child Care and Social Services	3.3 M	85%	22% | 43% | 34%
Trucking, Warehouse, and Postal Service	3.1 M	23%	18% | 42% | 40%
Mechanics	2.7 M	4%	29% | 39% | 32%
Building Cleaning Services	1.5 M	53%	23% | 42% | 35%
Public Transit	0.8 M	29%	19% | 35% | 46%

Key Insights

Over one-in-three (34%) workers in frontline industries are over age 50, and a substantial number live in a household with one or more older people

About one-in-ten frontline workers in this industry do not have health insurance. Among workers in Building Cleaning Services, nearly three-in-ten are uninsured

Many workers in frontline industries have family care obligations. **More than one-third of frontline workers (35.9 percent) have a minor child at home**

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Note: Above Talent, data has been fetched using Draup's Talent module which tracks 750M + profiles across the globe and has been cross-validated by comparing the data from official government BLS website, industry reports such as A Basic Demographic Profile of Workers in Frontline Industries, research papers and news articles.

Source: Draup

Frontline Industry 2025 Projection: Matured workers (50+ years) are expected to increase across all the industries except Trucking, warehouse and Postal cleaning services and Building cleaning services industry; Slight trend reversal across the gender diversity is expected across all the analysed frontline industries

	Total Frontline Workers	Female%	Age Split (20-30 Yrs. | 31-50 Yrs. | 50+ Yrs.)
All Frontline Industries	42.6 M	55%	22% | 41% | 37%
Health Care	17.25 M	75%	22% | 40% | 38%
Grocery, Convenience, and Drug Stores	7.70 M	51%	16% | 51% | 33%
Manufacturing	4.49 M	26%	26% | 34% | 40%
Child Care and Social Services	3.79 M	84%	18% | 43% | 39%
Trucking, Warehouse, and Postal Service	3.84 M	27%	22% | 40% | 38%
Mechanics	2.96 M	5%	31% | 34% | 35%
Building Cleaning Services	1.54 M	57%	27% | 39% | 34%
Public Transit	1.03 M	30%	16% | 26% | 58%

Key Insights

AGE

The **proportion of older employees is expected to increase** across the overall frontline worker segment **resulting in higher median age** and increased challenge of retaining a younger workforce

The **trucking warehouse and postal service industry** is expected to **surpass the childcare and social services industry** in terms of employment numbers.

The Building Cleaning services industry and The trucking warehouse and postal services industry are expected to show the **highest percentage points growth in employed female talent**

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Note: Above Talent, data has been fetched using Draup's Talent module which tracks 750M + profiles across the globe and has been cross-validated by comparing the data from official government BLS website, industry reports such as A Basic Demographic Profile of Workers in Frontline Industries, research papers and news articles.

Source: Draup

Frontline Industry 2027 Projections: Frontline workers are expected to grow further by the year 2027. Matured frontline workers (50+ years of experience) are further expected to increase across all the frontline industries except for Trucking, warehouse, and postal services and Building, cleaning services industry, trend reversal across the gender diversity landscape is expected to continue

	Total Frontline Workers	Female%	Age Split (20-30 Yrs. | 31-50 Yrs. | 50+ Yrs.)
All Frontline Industries	45.4 M	54%	22% | 39% | 39%
Health Care	17.80 M	74%	23% | 38% | 39%
Grocery, Convenience, and Drug Stores	8.34 M	52%	14% | 50% | 36%
Manufacturing	4.95 M	25%	25% | 30% | 45%
Child Care and Social Services	4.14 M	83%	16% | 43% | 41%
Trucking, Warehouse, and Postal Service	4.30 M	28%	24% | 39% | 37%
Mechanics	3.13 M	4%	31% | 32% | 36%
Building Cleaning Services	1.57 M	59%	29% | 37% | 33%
Public Transit	1.20 M	31%	14% | 22% | 64%

Key Insights

The proportion of **older employees is further expected to increase** across overall frontline workers, resulting in a further increase in the median age of the workforce

The **Public transit and The Trucking, warehouse, and Postal services industry are expected to be growing at the fastest rate** and except Health care industry all other industries are expected to grow at a higher rate

The **Building Cleaning services industry and The trucking warehouse** and postal services industry are expected to show the **highest percentage points growth in employed female talent**

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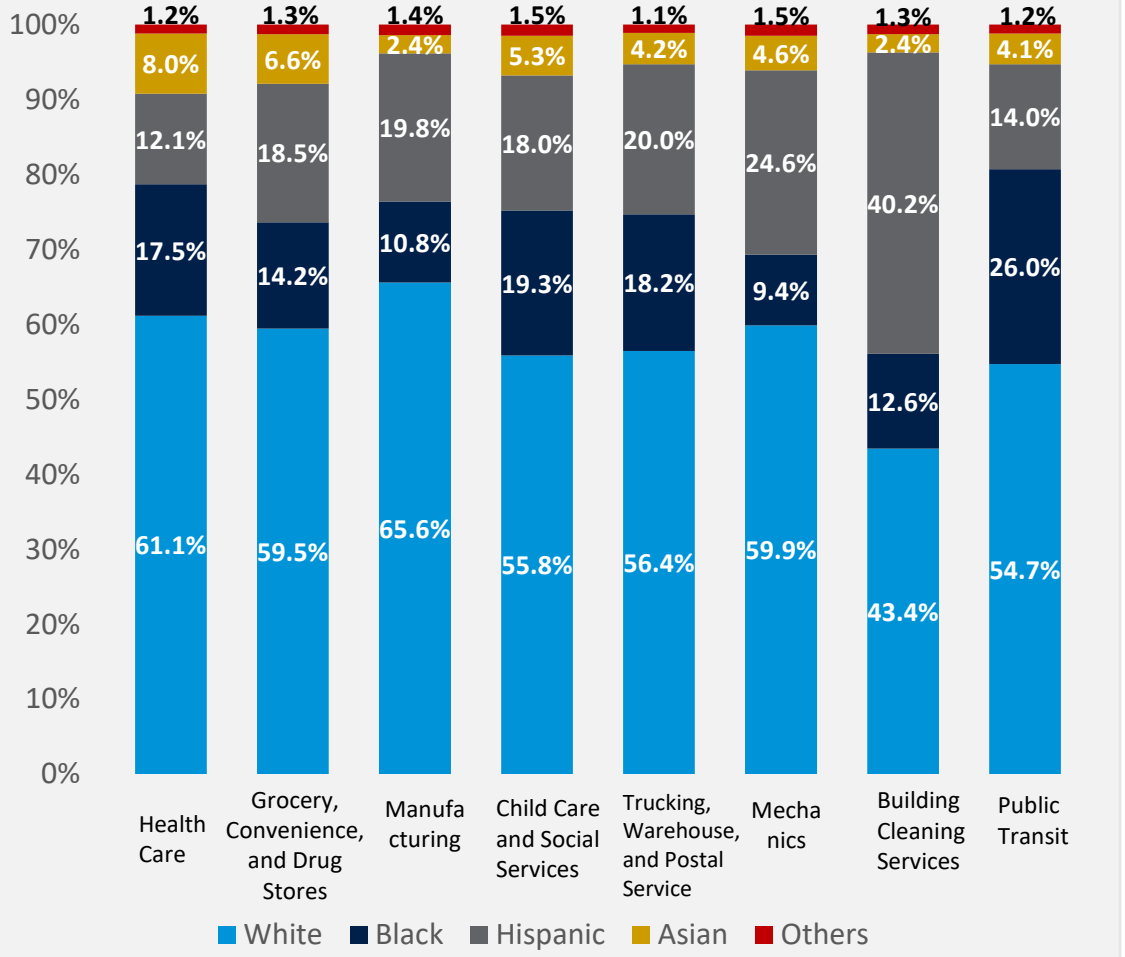
Source: Draup

Frontline workers Ethnic Diversity & Education Level: In the frontline industries, Trucking, Warehouse, and Postal Service industry have a relatively low share of talent with College or above level Education Qualification; Hispanic followed by Afro American ethnicity have higher representation in overall frontline workforce

Ethnic Diversity



40.4%

Roughly four-in-ten (40.4%) frontline workers are Afro American, Hispanic, Asian-American/Pacific Islander, or some category other than white

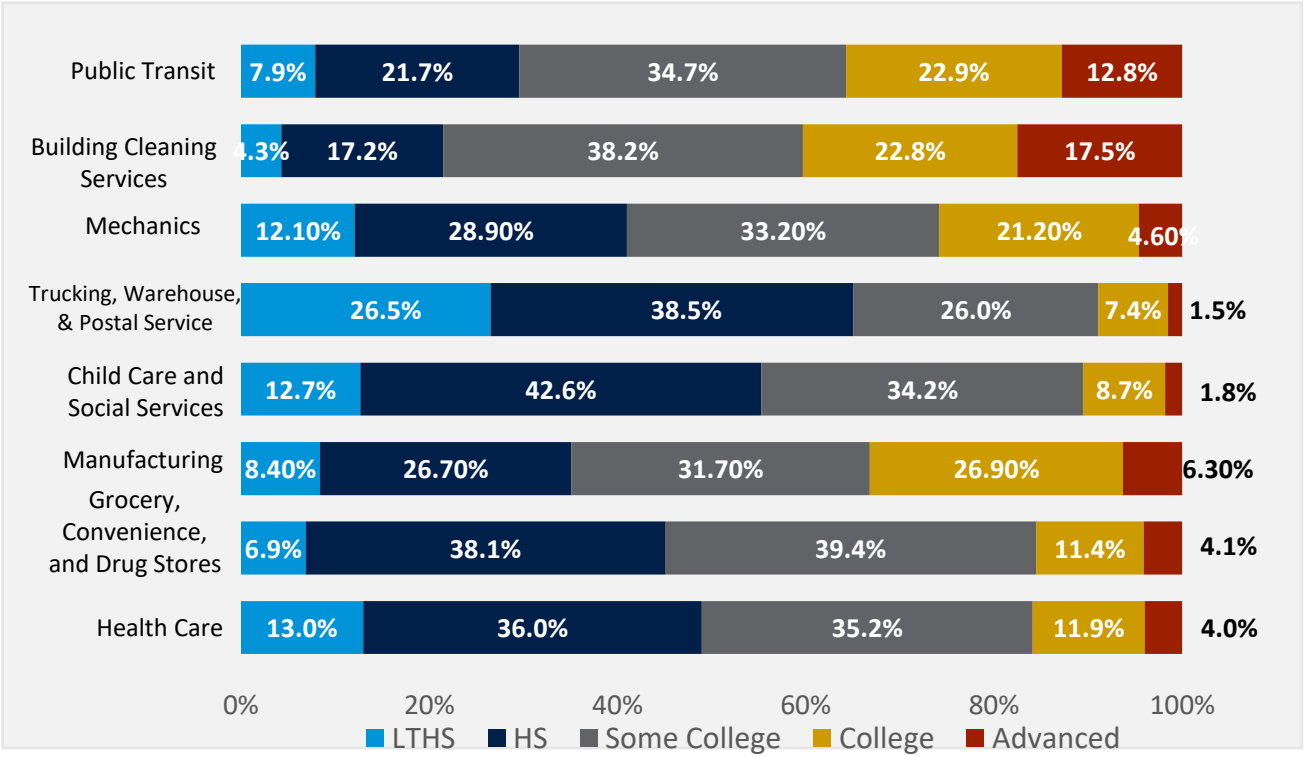
78.5%

Nearly eight-in-ten (78.5%) frontline workers in Building Cleaning Services have some College or above level education qualification

65.0%

Over six-in-ten (65.0%) frontline workers in Trucking, Warehouse, and Postal Services has utmost High School education qualification

Education Qualification



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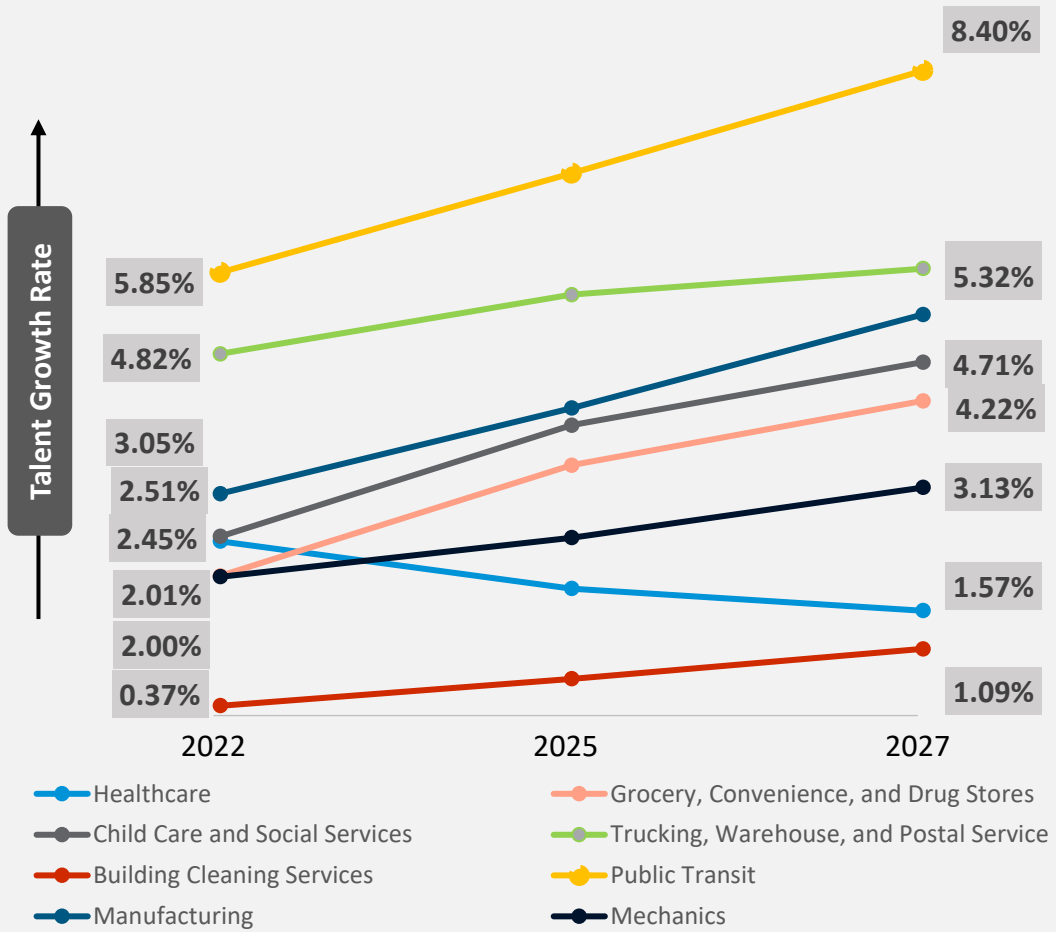
Note: Demographic trends are derived from an analysis of data from BLS (Bureau of Labor Statistics - USA). Draup's Proprietary Model analysis, research papers from EEOC, International Union for Scientific Study of population.
LTHS- Less Than High School, HS- High School, Some College – College dropout; The represented data has been fetched from the report 'A Basic Demographic Profile of Workers in Frontline Industries'

Source: Draup

Growth Rate Trends Analysis: Across the analyzed frontline industries, it is observed that Public Transit industry is going to increase with a rapid growth rate, whereas the Healthcare industry is expected to have a declining growth rate over the next few years

Frontline Industries Projected Growth Rate Trends



Industry	Total Talent in 2021	2025		2027	
		Incoming Talent	Outgoing Talent	Incoming Talent	Outgoing Talent
Healthcare	16.1 M	4.24 M	3.08 M	2.16 M	1.61 M
Grocery, Convenience, and Drug Stores	6.8 M	2.20 M	1.30 M	1.23 M	0.60 M
Child Care and Social Services	3.3 M	1.16 M	0.64 M	0.63 M	0.28 M
Trucking, Warehouse, and Postal Service	3.1 M	1.31 M	0.58 M	0.74 M	0.27 M
Building Cleaning Services	1.5 M	0.32 M	0.28 M	0.16 M	0.13 M
Public Transit	0.8 M	0.38 M	0.15 M	0.25 M	0.08 M
Manufacturing	3.9 M	1.39 M	0.78 M	0.83 M	0.38 M
Mechanics	2.7 M	0.79 M	0.52 M	0.42 M	0.25 M

Note: The above insights are curated through various strategic and tactical signals from news articles, journals, Industry reports and, other official government platforms like BLS. The talent numbers mentioned are in Millions. Outgoing talent involves the talent moving out of that industry and incoming talent is the net of new talent getting added. The projected rates are calculated using the moving averages method and do not include the possible black swan events and the impact of digitization and automation.

Source: Draup

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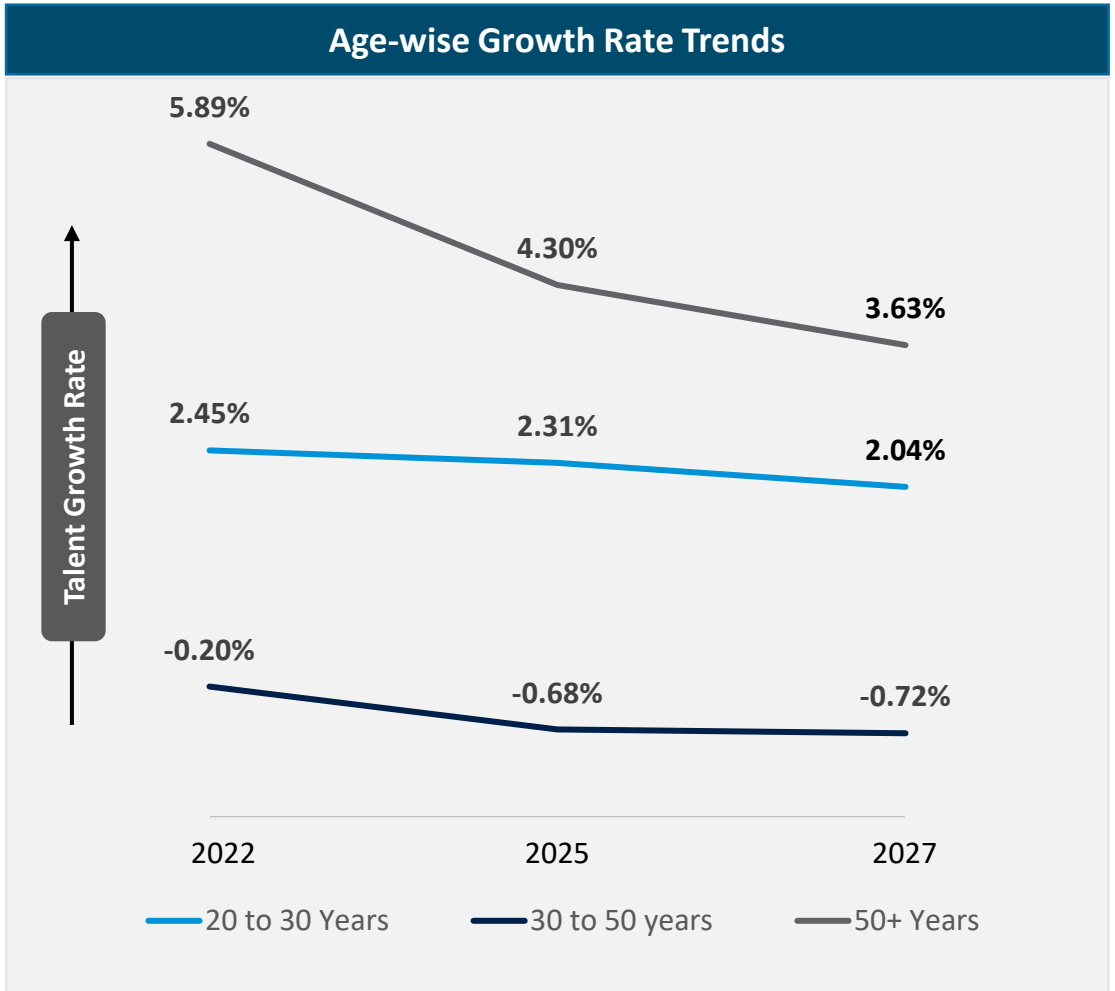
Healthcare workers Age-wise Growth Rate: Among the age groups, Healthcare industry workers with the age over 50 years have the highest growth rate compared to other age groups, but it is expected to decline over the next 3-5 years

Healthcare Industry Age-wise Projected Growth Rate Trends



2025				
Age Group	Total Talent in 2021	Incoming Talent (2021-2025)	Outgoing Talent (2021-2025)	Total Talent in 2025
20-30	3.54 M	1.28 M	0.94 M	3.88 M
30-50	7.09 M	1.22 M	1.41 M	6.89 M
50+	5.47 M	1.74 M	0.74 M	6.48 M

2027				
Age Group	Total Talent in 2025	Incoming Talent (2025-2027)	Outgoing Talent (2025-2027)	Total Talent in 2027
20-30	3.88 M	0.73 M	0.56 M	4.05 M
30-50	6.89 M	0.59 M	0.69 M	6.78 M
50+	6.48 M	0.85 M	0.36 M	6.97 M

Key Insights

- The age group of **30 to 50 years** is expected to **decline more towards the negative growth rate** in the next 5 years
- The growth rate in the age group of **20 to 30 years** is presumed to remain **consistent** over the next few years
- The **overall growth rate** in the Healthcare industry is **expected to decline** due to the considerable drop in the growth rate of 50+ years of age workers

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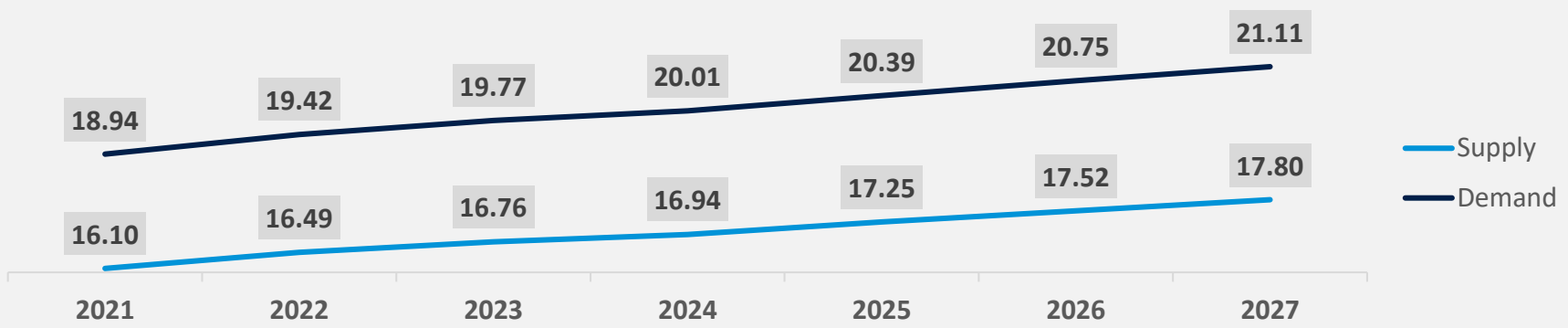
Source: Draup

Healthcare workers Demographics: The demand – supply gap in Healthcare industry is expected to increase by 16% from the year 2021 to 2027 for US frontline workforce

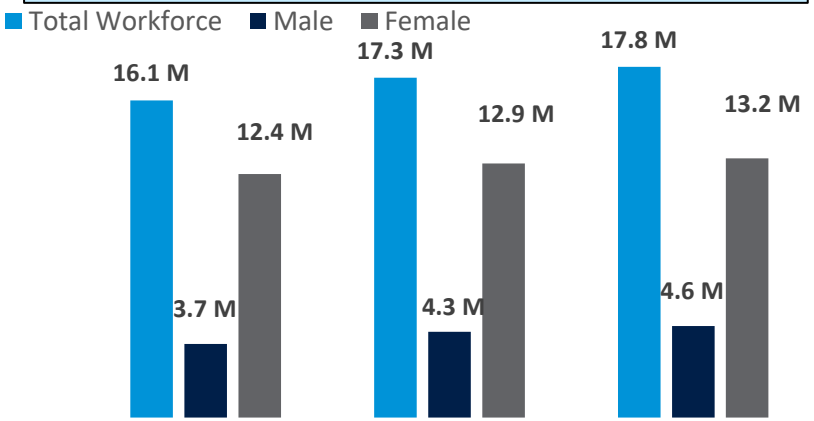
Frontline Workers Supply – Demand Projections of Healthcare Industry (Numbers in Millions)



Key Insights

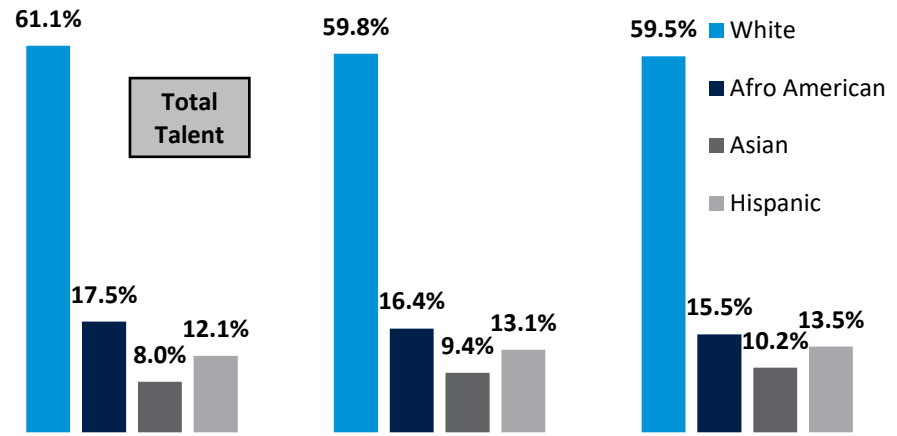
- ***Healthcare industry*** *accounts for* ***more than three-fourth of the female frontline workforce*** *compared to male talent*
- ***Across all the analyzed industries,*** *Healthcare industry has the* ***maximum share of ethnicity in Asian professionals,*** *i.e.,* ***more than 8.0%*** *of the total workforce in US*

Gender Representation of Healthcare Industry



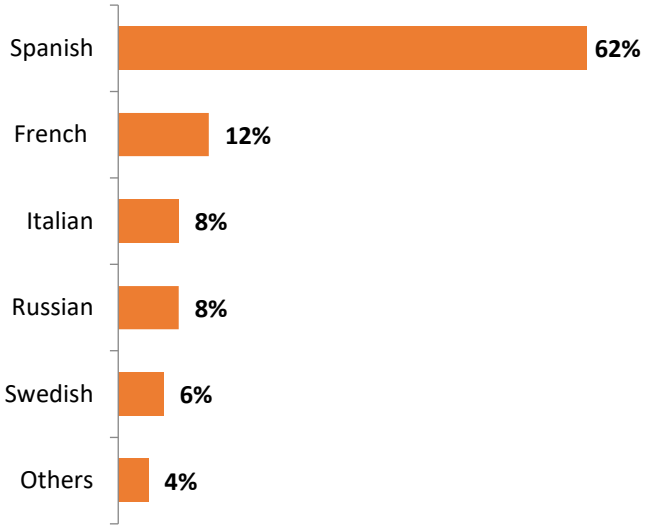
Year	2021	2025	2027
Total	16.1 M	17.3 M	17.8 M
Male	23.2%	25.2%	26.1%
Female	76.8%	74.8%	73.9%

Ethnicity Representation of Healthcare industry



2021	2025	2027
16.1 M	17.3 M	17.8 M

% Representation of Foreign Languages of Healthcare industry



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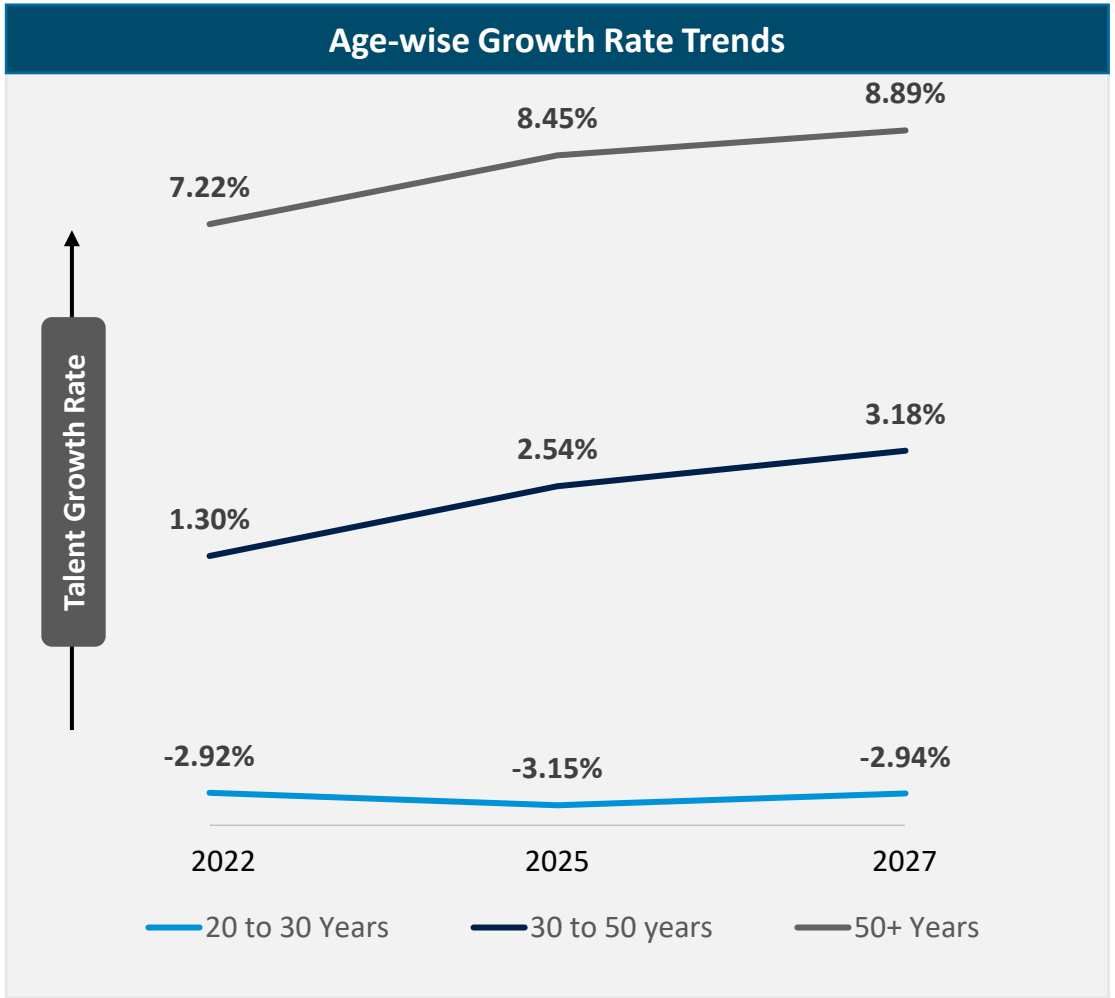
Source: Draup

Grocery, Convenience, and Drug Stores workers Age-wise Growth Rate: Among the age groups, Grocery, Convenience, and Drug Stores industry workers with the age over 50 years have the highest growth rate compared to other age groups and it is expected to rise over the next 5 years

Grocery, Convenience, and Drug Stores Industry Age-wise Projected Growth Rate Trends



2025				
Age Group	Total Talent in 2021	Incoming Talent (2021-2025)	Outgoing Talent (2021-2025)	Total Talent in 2025
20-30	1.43 M	0.21 M	0.38 M	1.26 M
30-50	3.54 M	1.04 M	0.67 M	3.91 M
50+	1.83 M	0.95 M	0.25 M	2.54 M

2027				
Age Group	Total Talent in 2025	Incoming Talent (2025-2027)	Outgoing Talent (2025-2027)	Total Talent in 2027
20-30	1.26 M	0.11 M	0.18 M	1.18 M
30-50	3.91 M	0.48 M	0.24 M	4.15 M
50+	2.54 M	0.65 M	0.18 M	3.01 M

Key Insights

- The growth rate in the **30 to 50 years** of age group is **expected to increase** more than twice in the upcoming years
- The total talent in the age group of **20 to 30 years** will continue to **decline in the future**
- The growth rate across the **50+ years** age group is expected to **remain highest**, thus further increasing the median age of the workforce

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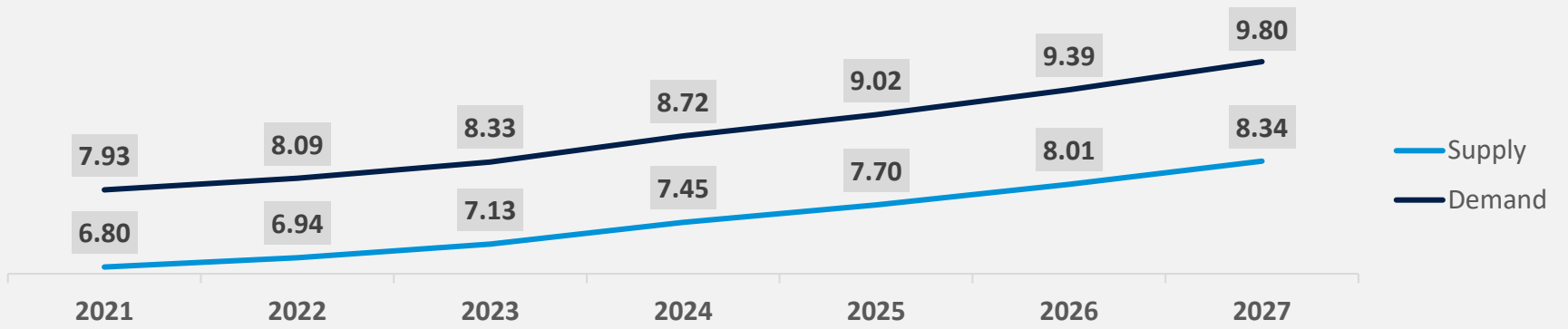
Note: The above insights are curated through various strategic and tactical signals from news articles, journals, Industry reports and, other official government platforms like BLS. The talent numbers mentioned are in Millions. Outgoing talent involves the talent moving out of that industry and incoming talent is the net of new talent getting added and change in age categories over the years. The projected rates are calculated using the moving averages method and do not include the possible black swan events and the impact of digitization and automation.

Source: Draup

Grocery, Convenience, and Drug Stores workers Demographics: The demand percentage in the year 2024 is expected to be increased by 4.58% which is highest compared to other years for the Grocery, Convenience, and Drug Stores industry frontline workforce

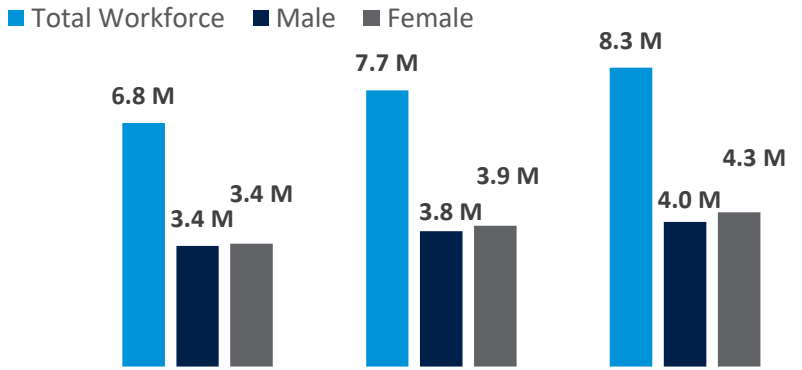
Frontline Workers Supply – Demand Projections of Grocery, Convenience, and Drug Stores Industry (Numbers in Millions)



Key Insights

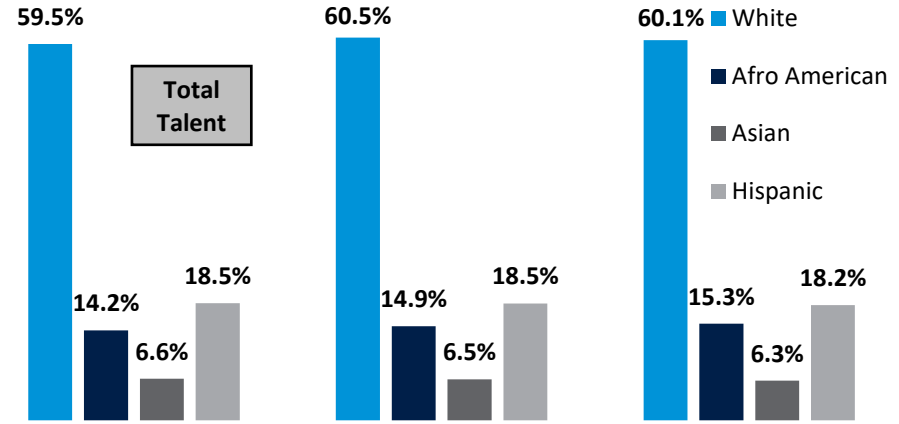
- ***The Total Demand in Grocery, Convenience, and Drug Stores industry*** *is expected to increase by* ***24%*** *from 2021 to 2027*
- ***Afro American and Hispanic professionals*** *in* ***Grocery, Convenience, and Drug Stores industry*** *approximately accounts for* ***one-third*** *of the total workforce in US*

Gender Representation of Grocery, Convenience, and Drug Stores Industry



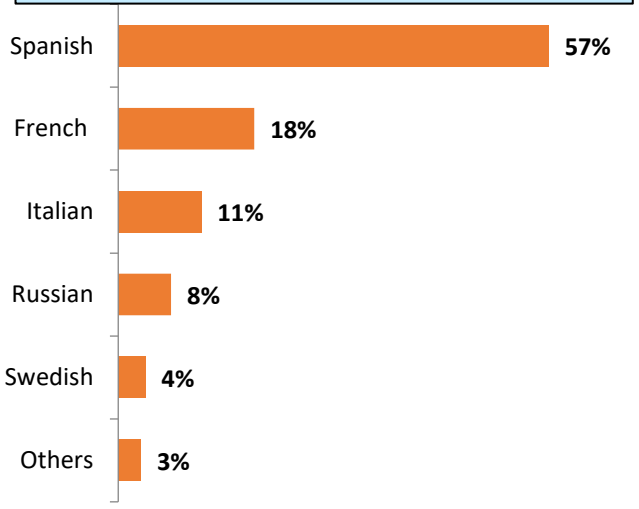
Year	2021	2025	2027
Total	6.8 M	7.7 M	8.3 M
Male	49.5%	49.0%	48.4%
Female	50.5%	51.0%	51.6%

Ethnicity Representation of Grocery, Convenience, and Drug Stores industry



2021	2025	2027
6.8 M	7.7 M	8.3 M

% Representation of Foreign Languages of Grocery, Convenience, and Drug Stores industry



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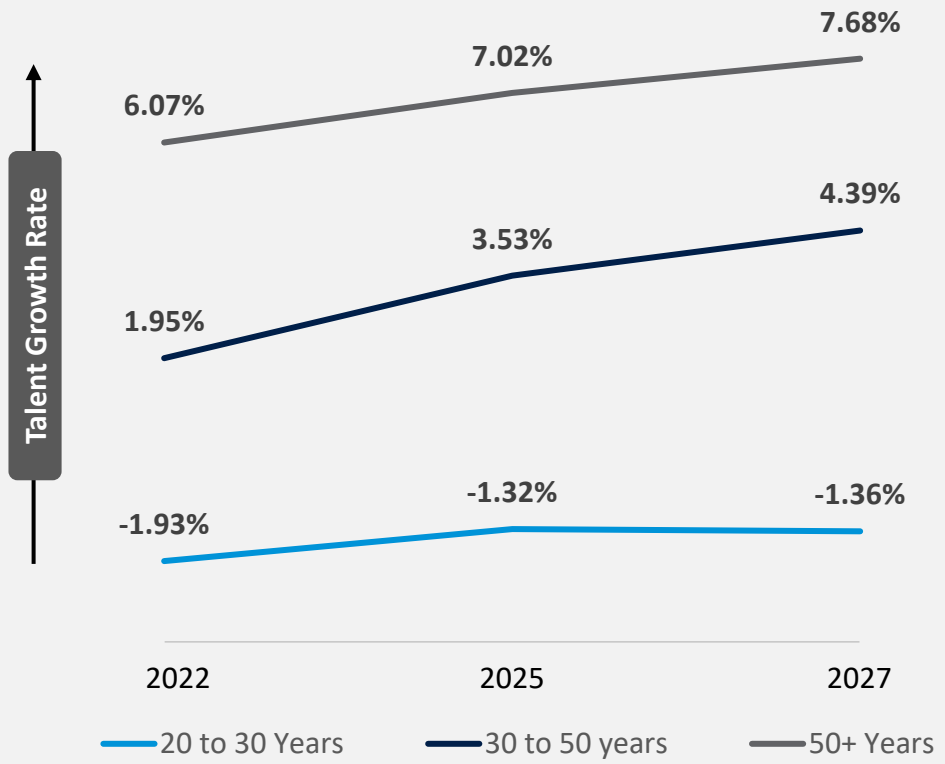
Source: Draup

Child Care and Social Services workers Age-wise Growth Rate: Among the age groups, Child Care and Social Services industry workers with the age over 50 years have the highest growth rate compared to other age groups, whereas the growth rate of 20 to 30 years of age group is expected to stay in the negative region

Child Care and Social Services Industry Age-wise Projected Growth Rate Trends

Age-wise Growth Rate Trends



2025				
Age Group	Total Talent in 2021	Incoming Talent (2021-2025)	Outgoing Talent (2021-2025)	Total Talent in 2025
20-30	0.73 M	0.18 M	0.22 M	0.69 M
30-50	1.42 M	0.47 M	0.26 M	1.63 M
50+	1.12 M	0.51 M	0.16 M	1.47 M

2027				
Age Group	Total Talent in 2025	Incoming Talent (2025-2027)	Outgoing Talent (2025-2027)	Total Talent in 2027
20-30	0.69 M	0.09 M	0.10 M	0.67 M
30-50	1.63 M	0.22 M	0.08 M	1.77 M
50+	1.47 M	0.33 M	0.10 M	1.70 M

Key Insights

- The growth rate in the **20 to 30 years** of age group will **increase** however it will still stay in the **negative region** for some years
- The growth rate in the **30 to 50 years** of age group is expected to **increase more than twice** by the year 2027
- The **overall growth rate** in Child Care and Social Services **will continue to rise** in the upcoming years

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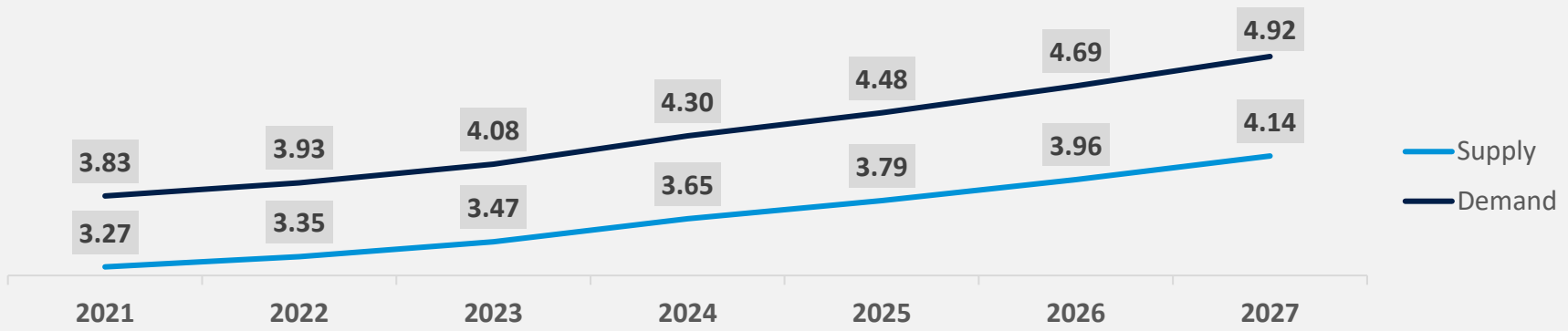
Note: The above insights are curated through various strategic and tactical signals from news articles, journals, Industry reports and, other official government platforms like BLS. The talent numbers mentioned are in Millions. Outgoing talent involves the talent moving out of that industry and incoming talent is the net of new talent getting added and change in age categories over the years. The projected rates are calculated using the moving averages method and do not include the possible black swan events and the impact of digitization and automation.

Source: Draup

Child Care and Social Services workers Demographics: Representation of female in Child Care and Social Services industry is highest (85%) among the analysed industries, however it is expected to see a declining trend over the next few years

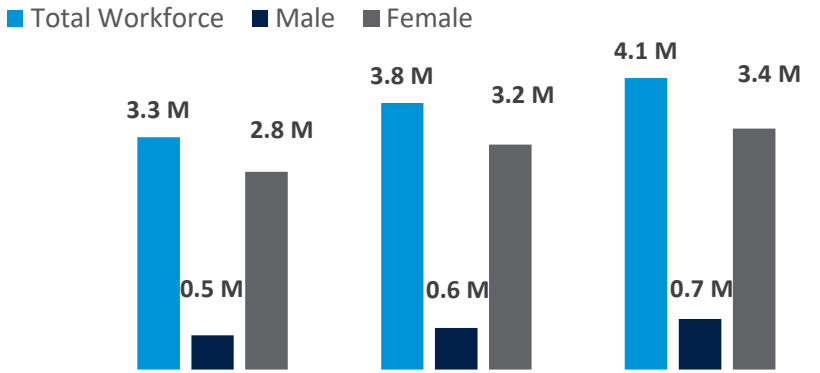
Frontline Workers Supply – Demand Projections of Child Care and Social Services Industry (Numbers in Millions)



Key Insights

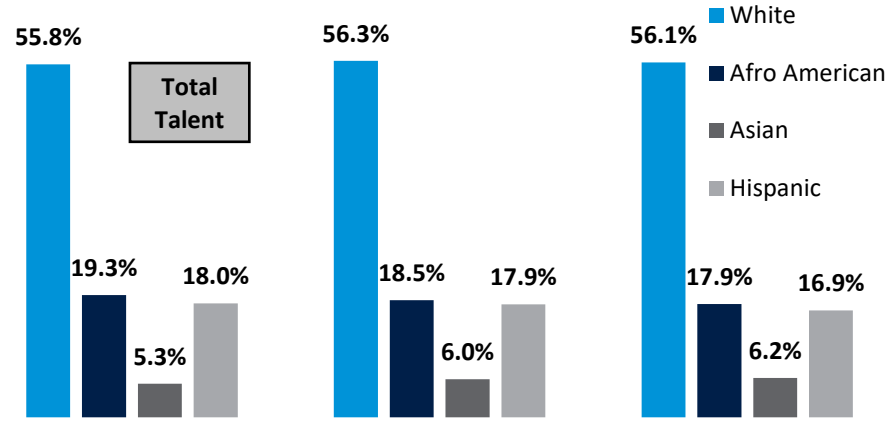
- ***Demand – Supply gap*** *in Child Care and Social Services industry is expected to* ***increase*** *from* ***0.56 M to 0.78 M*** *from the year 2021 to 2027 respectively*
- *Across all the ethnicities,* ***Asian professionals (5.3%)*** *in Child Care and Social Services industry* ***have a low share of ethnicity in US***

Gender Representation of Child Care and Social Services Industry



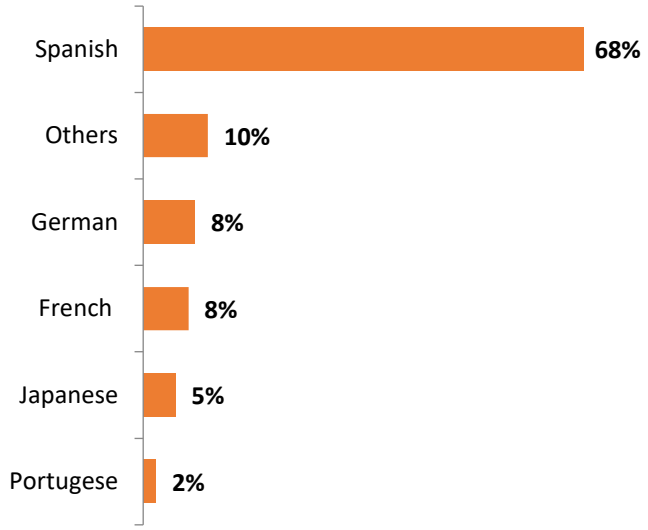
Year	2021	2025	2027
Total	3.3 M	3.8 M	4.1 M
Male	14.8%	15.6%	17.3%
Female	85.2%	84.4%	82.7%

Ethnicity Representation of Child Care and Social Services industry



2021	2025	2027
3.3 M	3.8 M	4.1 M

% Representation of Foreign Languages of Child Care and Social Services industry



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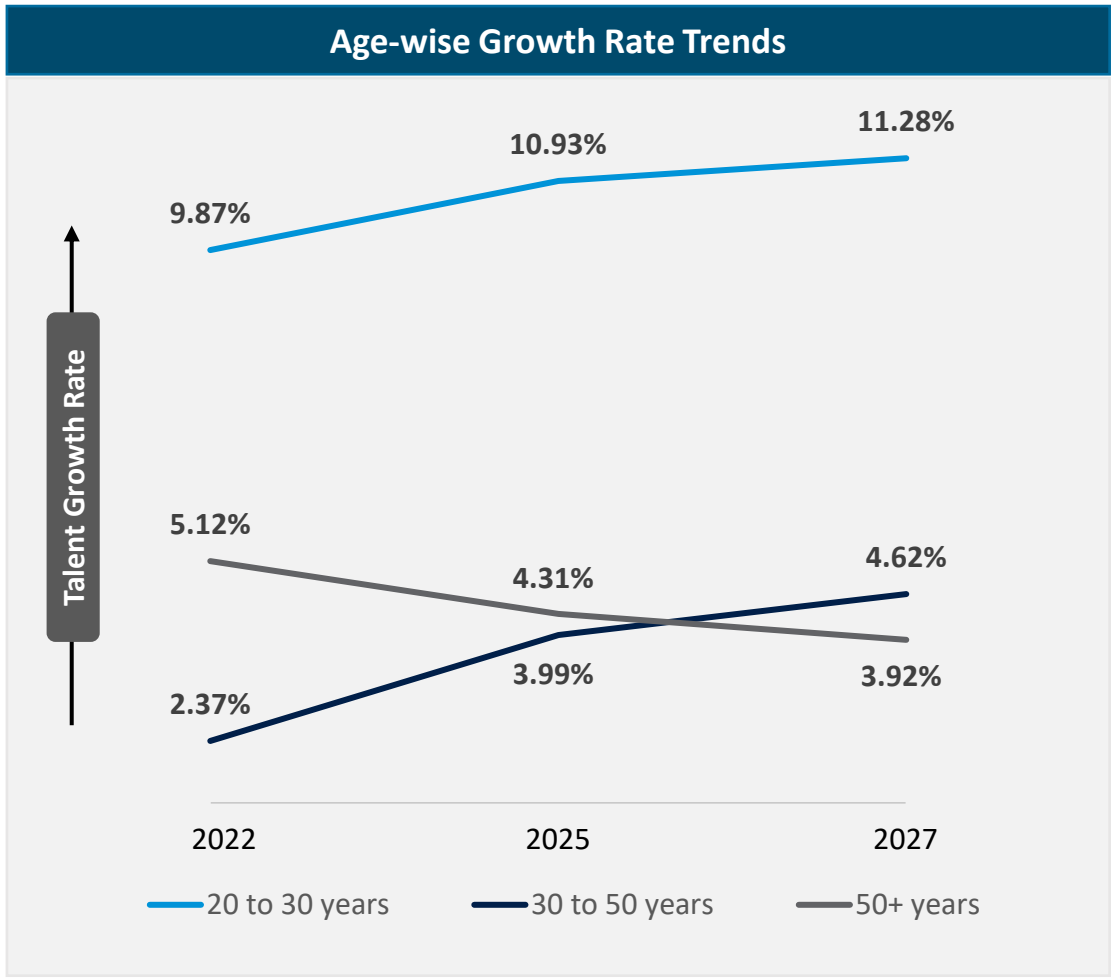
Note: Demographic trends are derived from an analysis of data from BLS (Bureau of Labor Statistics - USA). Draup's Proprietary Model analysis, research papers from EEOC, International Union for Scientific Study of population. The represented data has been fetched from the report 'A Basic Demographic Profile of Workers in Frontline Industries'. Draup's proprietary talent module analyzed the diversity metrics across the talent pool in US. Talent supply is the total installed/ available talent specific to a region. Talent Demand is the aggregate sum of the total talent supply and the unique unfilled job postings.

Source: Draup

Trucking, Warehouse, and Postal Service workers Age-wise Growth Rate: Among the age groups, Trucking, Warehouse, and Postal Service industry workers with the age between 20 to 30 years have the highest growth rate compared to other age groups and it is expected to increase more in the upcoming years

Trucking, Warehouse, and Postal Service Industry Age-wise Projected Growth Rate Trends



2025				
Age Group	Total Talent in 2021	Incoming Talent (2021-2025)	Outgoing Talent (2021-2025)	Total Talent in 2025
20-30	0.56 M	0.44 M	0.15 M	0.84 M
30-50	1.30 M	0.48 M	0.26 M	1.52 M
50+	1.24 M	0.39 M	0.16 M	1.47 M

2027				
Age Group	Total Talent in 2025	Incoming Talent (2025-2027)	Outgoing Talent (2025-2027)	Total Talent in 2027
20-30	0.84 M	0.31 M	0.11 M	1.05 M
30-50	1.52 M	0.23 M	0.09 M	1.66 M
50+	1.47 M	0.19 M	0.07 M	1.59 M

Key Insights

- The growth rate in the **50+ years** of age group will **decrease** over the years but it will continue to stay in the **positive region**
- The growth rate in the **20 to 30 years** of age group would remain **more than the combined** growth rate of other two age groups by the year 2027
- The growth rate in the **30 to 50 years** of age group will eventually **become greater than the growth rate in 50+ years** of age group

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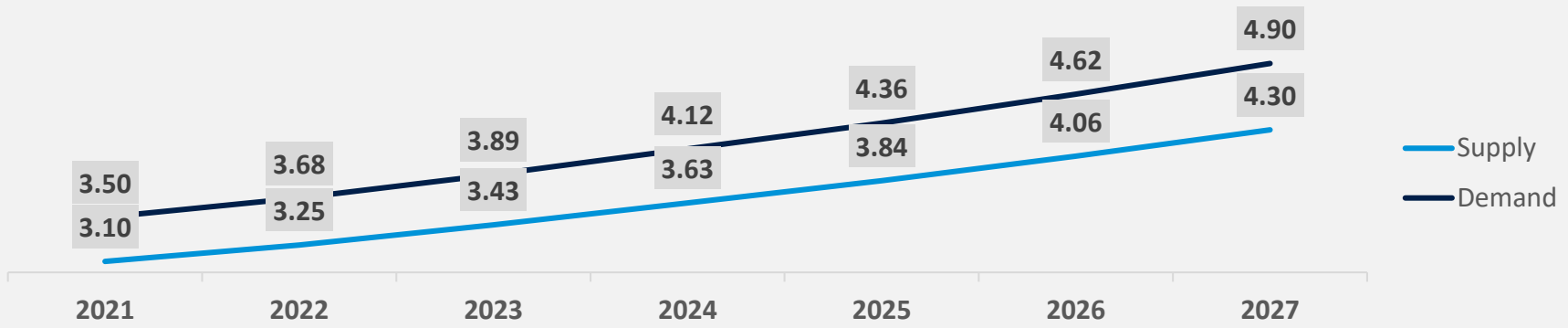
Note: The above insights are curated through various strategic and tactical signals from news articles, journals, Industry reports and, other official government platforms like BLS. The talent numbers mentioned are in Millions. Outgoing talent involves the talent moving out of that industry and incoming talent is the net of new talent getting added and change in age categories over the years. The projected rates are calculated using the moving averages method and do not include the possible black swan events and the impact of digitization and automation.

Source: Draup

Trucking, Warehouse, and Postal Service workers Demographics: The demand – supply gap in Trucking, Warehouse, and Postal Service industry is expected to increase by 50% from the year 2021 to 2027 for US frontline workforce

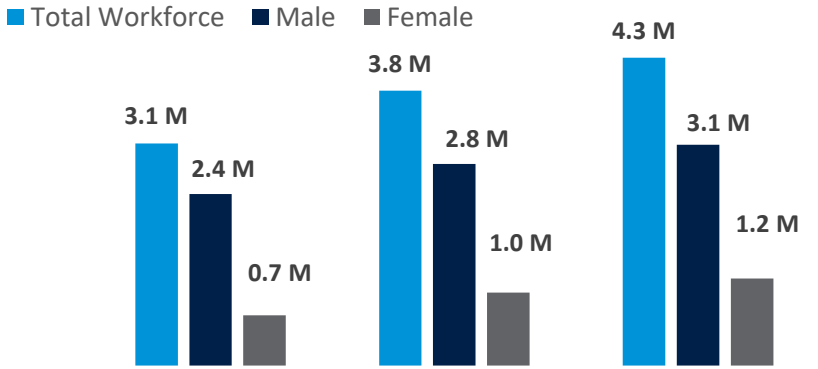
Frontline Workers Supply – Demand Projections of Trucking, Warehouse, and Postal Service Industry (Numbers in Millions)



Key Insights

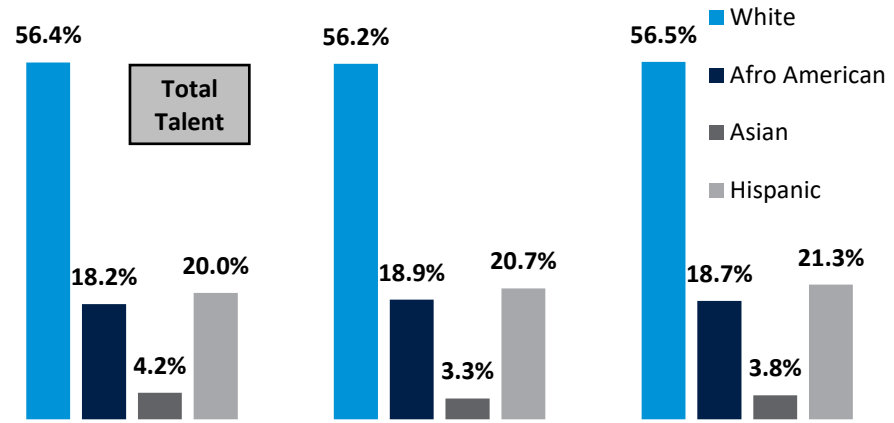
- *Trucking, Warehouse, and Postal Service industry accounts for **more than three-fourth of the male frontline workforce** compared to female talent*
- *Across all the analyzed industries, representation of **Spanish speaking frontline workers is highest in Trucking, Warehouse, and Postal Service industry i.e., 74%***

Gender Representation of Trucking, Warehouse, and Postal Service Industry



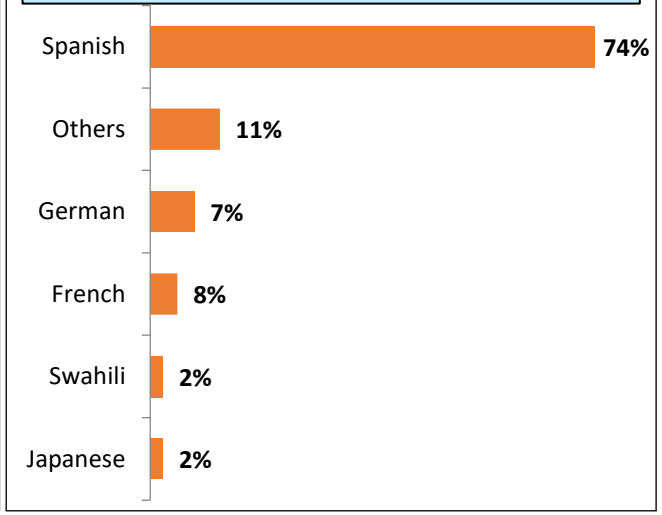
Year	2021	2025	2027
Total	3.1 M	3.8 M	4.3 M
Male	77.3%	73.4%	71.7%
Female	22.7%	26.6%	28.3%

Ethnicity Representation of Trucking, Warehouse, and Postal Service industry



2021	2025	2027
3.1 M	3.8 M	4.3 M

% Representation of Foreign Languages of Trucking, Warehouse, and Postal Service industry



Note: Demographic trends are derived from an analysis of data from BLS (Bureau of Labor Statistics - USA). Draup's Proprietary Model analysis, research papers from EEOC, International Union for Scientific Study of population. The represented data has been fetched from the report 'A Basic Demographic Profile of Workers in Frontline Industries'. Draup's proprietary talent module analyzed the diversity metrics across the talent pool in US. Talent supply is the total installed/ available talent specific to a region. Talent Demand is the aggregate sum of the total talent supply and the unique unfilled job postings.

Source: Draup

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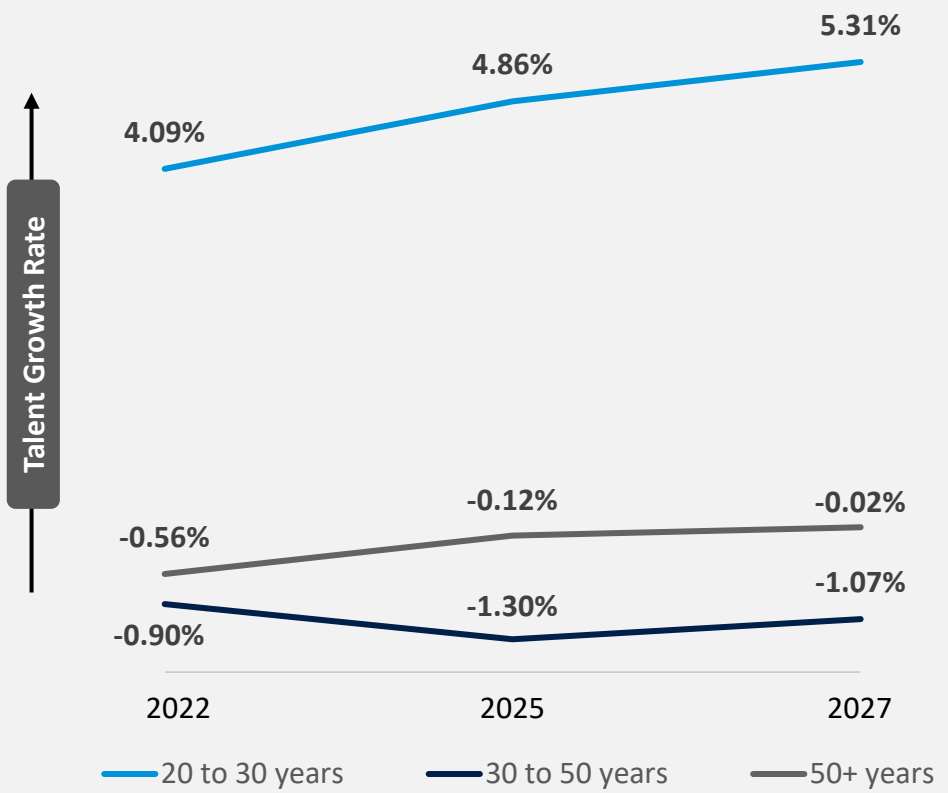
Building Cleaning Services workers Age-wise Growth Rate: Among the age groups, Building Cleaning Services industry workers with the age between 20 to 30 years have the highest growth rate compared to other age groups and it is expected to increase over the next few years

Building Cleaning Services Industry Age-wise Projected Growth Rate Trends

Age-wise Growth Rate Trends



2025				
Age Group	Total Talent in 2021	Incoming Talent (2021-2025)	Outgoing Talent (2021-2025)	Total Talent in 2025
20-30	0.34 M	0.16 M	0.09 M	0.42 M
30-50	0.63 M	0.09 M	0.12 M	0.60 M
50+	0.53 M	0.06 M	0.07 M	0.52 M

2027				
Age Group	Total Talent in 2025	Incoming Talent (2025-2027)	Outgoing Talent (2025-2027)	Total Talent in 2027
20-30	0.42 M	0.10 M	0.06 M	0.46 M
30-50	0.60 M	0.02 M	0.04 M	0.58 M
50+	0.52 M	0.03 M	0.03 M	0.52 M

Key Insights

- The growth rate in the age group of **50+ years and 30 to 50 years** will remain more or less **constant** over the next five years
- The **overall growth rate** in the Building Cleaning Services industry is expected to be **positive** due to the substantial increase in the age group of 20 to 30 years

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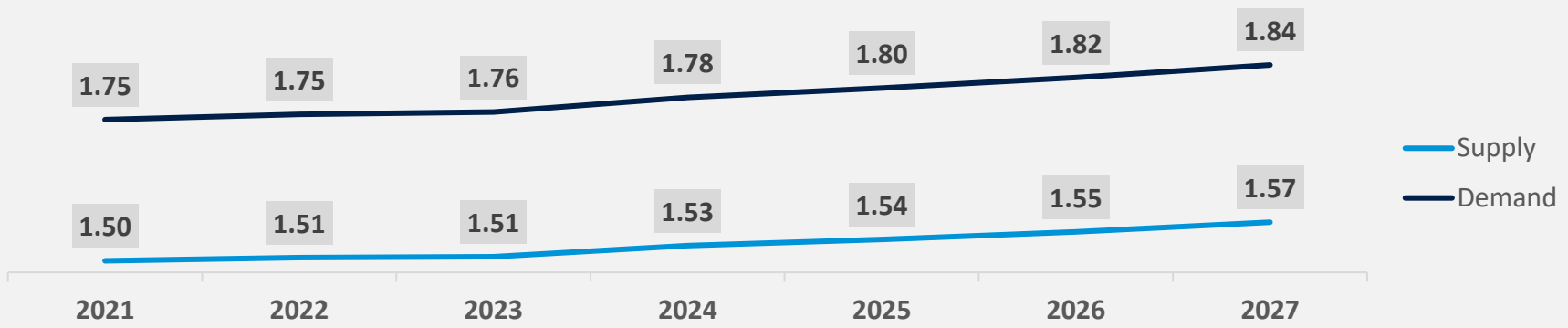
Source: Draup

Building Cleaning Services Demographics: Building Cleaning Services industry accounts for the maximum share of ethnicity in Hispanic professionals, i.e., more than 40% of the total workforce in US across all the analyzed industries

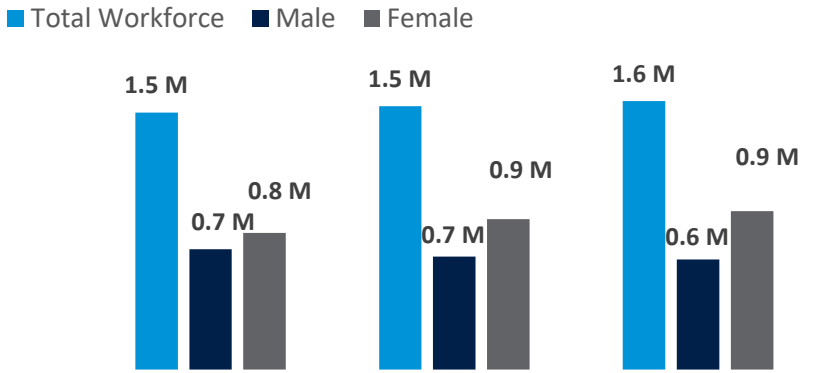
Frontline Workers Supply – Demand Projections of Building Cleaning Services Industry (Numbers in Millions)



Key Insights

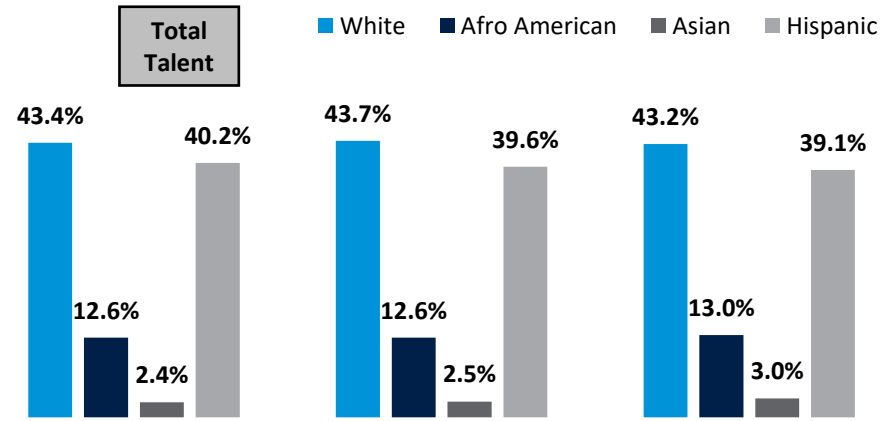
- *Frontline workforce in Building Cleaning Service industry is **slightly female dominant (53%)** with higher representation of gender diversity **compared to male talent***
- *The **Total Demand in Building Cleaning Service industry** is expected to **increase by 5%** from the year 2021 to 2027 for US frontline workforce*

Gender Representation of Building Cleaning Services Industry



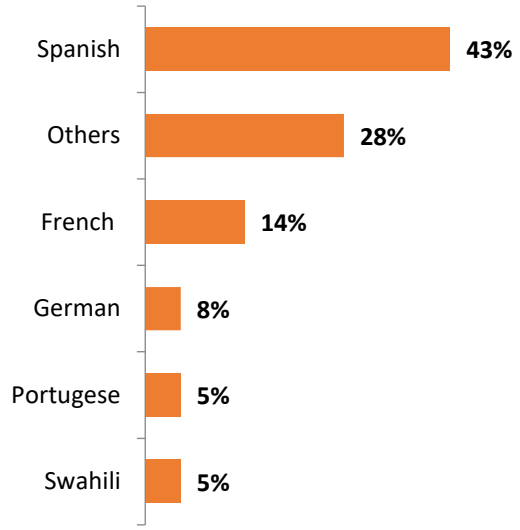
Year	2021	2025	2027
Total	1.5 M	1.5 M	1.6 M
Male	46.8%	42.9%	41.0%
Female	53.2%	57.1%	59.0%

Ethnicity Representation of Building Cleaning Services industry



2021	2025	2027
1.5 M	1.5 M	1.6 M

% Representation of Foreign Languages of Building Cleaning Services industry



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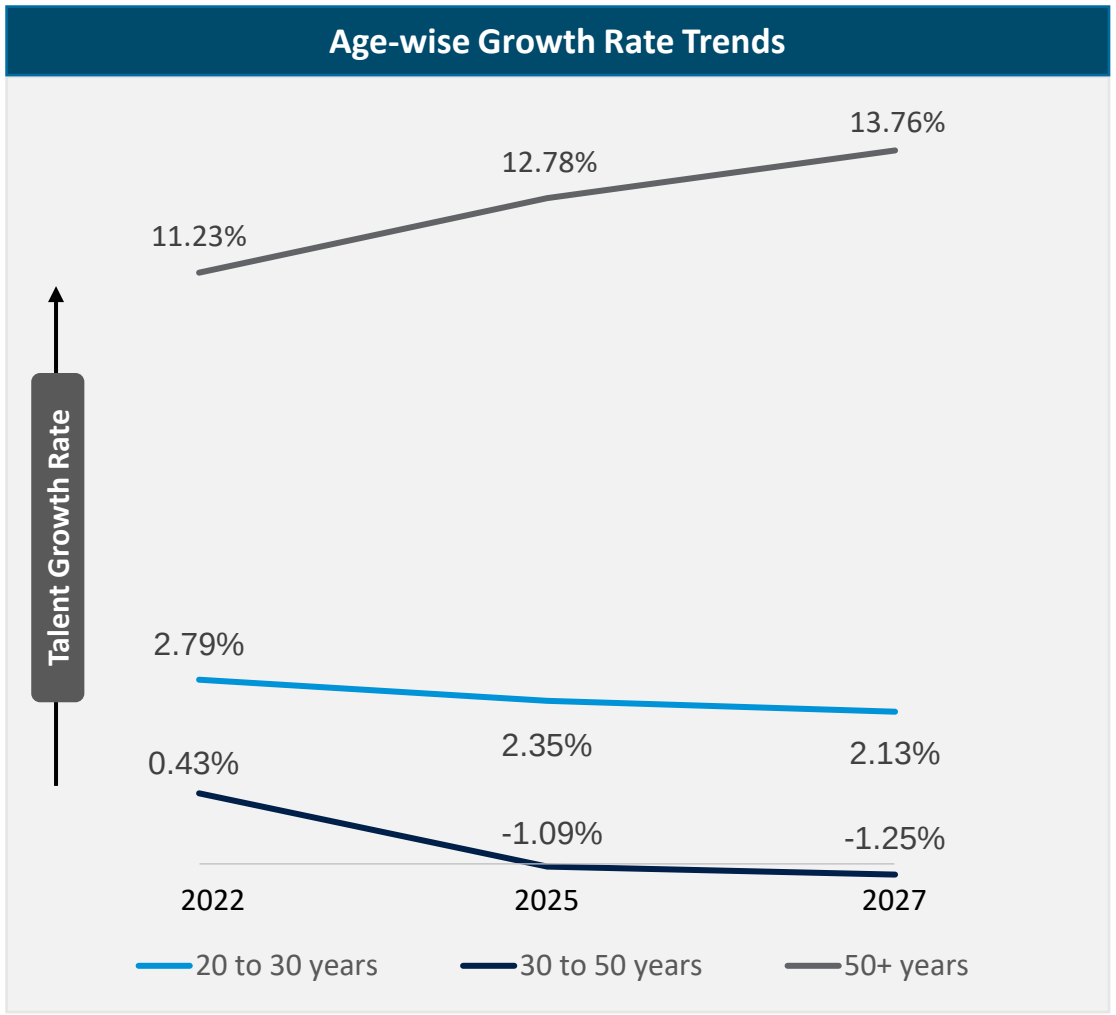
Source: Draup

Public Transit workers Age-wise Growth Rate: Among the age groups, Public Transit industry workers with the age over 50 years have the highest growth rate compared to other age groups and it is expected to increase further over the next 3-5 years

Public Transit Industry Age-wise Projected Growth Rate Trends



2025				
Age Group	Total Talent in 2021	Incoming Talent (2021-2025)	Outgoing Talent (2021-2025)	Total Talent in 2025
20-30	0.15 M	0.06 M	0.04 M	0.17 M
30-50	0.28 M	0.04 M	0.06 M	0.27 M
50+	0.37 M	0.27 M	0.04 M	0.60 M

2027				
Age Group	Total Talent in 2025	Incoming Talent (2025-2027)	Outgoing Talent (2025-2027)	Total Talent in 2027
20-30	0.17 M	0.03 M	0.03 M	0.17 M
30-50	0.27 M	0.01 M	0.01 M	0.26 M
50+	0.60 M	0.21 M	0.04 M	0.77 M

Key Insights

- The growth rate in the **50+ years** of age group will **increase massively** over the next few years
- The growth rate in the age group of **20 to 30 years and 30 to 50 years** is expected to **decrease** in the upcoming years

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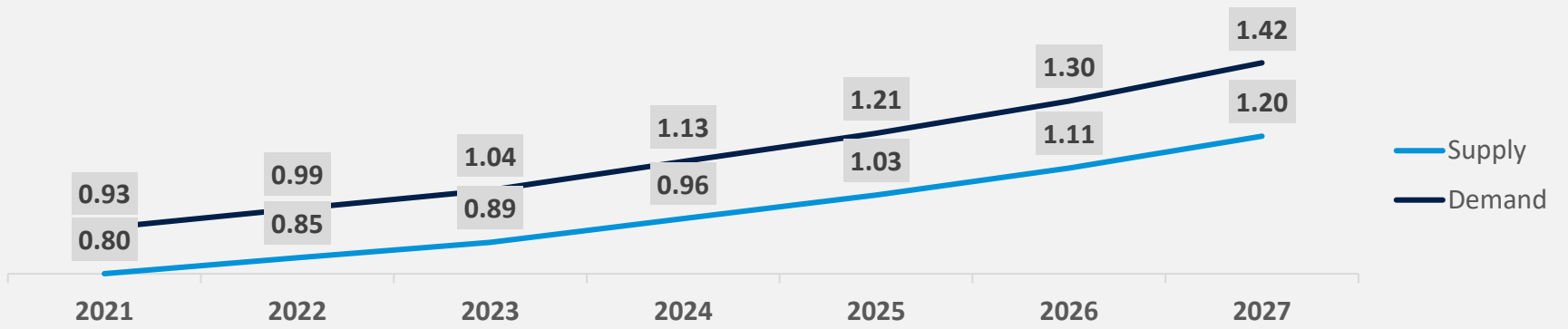
Source: Draup

Public Transit workers Demographics: Across all the analyzed industries, Public Transit industry has the maximum share of ethnicity in Afro American professionals, i.e., more than 25.0% of the total workforce in US

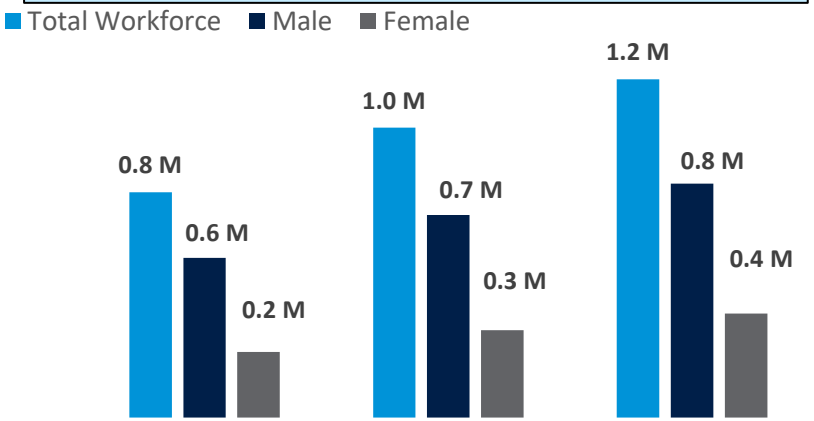
Frontline Workers Supply – Demand Projections of Public Transit Industry (Numbers in Millions)



Key Insights

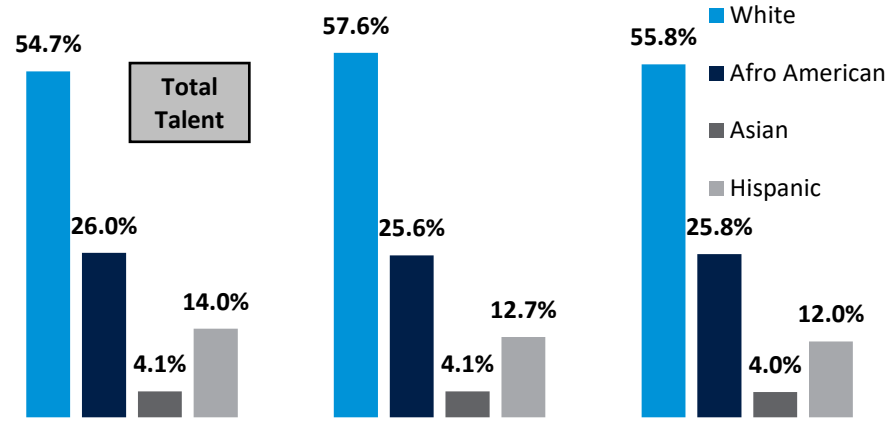
- *Frontline workforce in **Public Transit industry is male dominant (70%)** with higher representation of gender diversity compared to female talent*
- ***Demand – Supply gap** is expected to **increase** from **0.13 M to 0.22 M** from the year 2021 to 2027 respectively in the Public Transit industry*

Gender Representation of Public Transit Industry



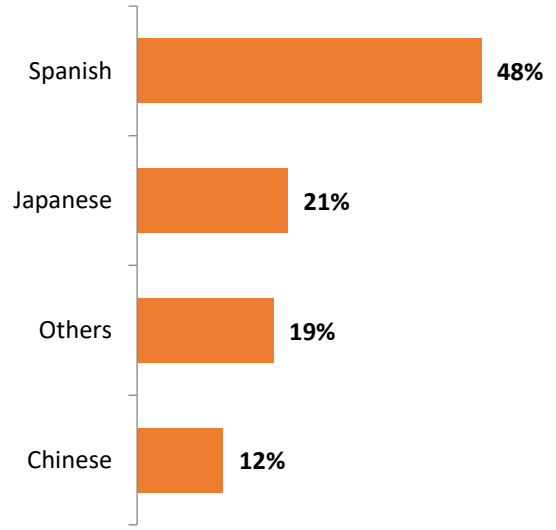
Year	2021	2025	2027
Total	0.8 M	1.0 M	1.2 M
Male	70.9%	69.9%	69.2%
Female	29.1%	30.1%	30.8%

Ethnicity Representation of Public Transit industry



2021	2025	2027
0.8 M	1.0 M	1.2 M

% Representation of Foreign Languages of Public Transit industry



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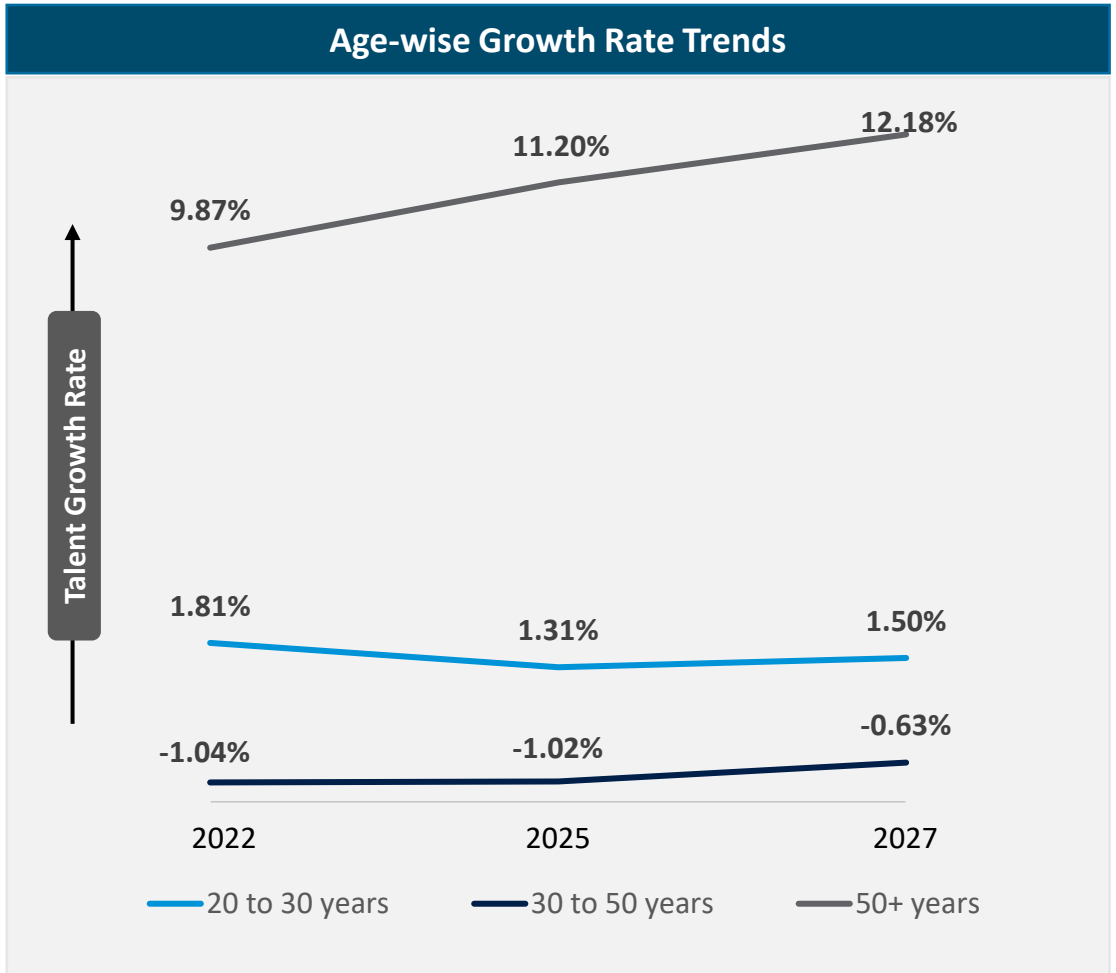
Source: Draup

Manufacturing workers Age-wise Growth Rate: Among the age groups, Manufacturing industry workers with the age over 50 years will continue to have a massive growth rate compared to other age groups

Manufacturing Industry Age-wise Projected Growth Rate Trends



2025				
Age Group	Total Talent in 2021	Incoming Talent (2021-2025)	Outgoing Talent (2021-2025)	Total Talent in 2025
20-30	1.12 M	0.39 M	0.33 M	1.18 M
30-50	1.60 M	0.25 M	0.31 M	1.53 M
50+	1.16 M	0.75 M	0.14 M	1.77 M

2027				
Age Group	Total Talent in 2025	Incoming Talent (2025-2027)	Outgoing Talent (2025-2027)	Total Talent in 2027
20-30	1.18 M	0.19 M	0.16 M	1.21 M
30-50	1.53 M	0.07 M	0.10 M	1.51 M
50+	1.77 M	0.57 M	0.12 M	2.22 M

Key Insights

- The growth rate in the **30 to 50 years** of age group will **increase** over the years however it will continue to stay in the **negative region**
- The growth rate in the **20 to 30 years** of age group would **remain constant** over the next five years
- The growth rate in the **50+ years** of age group will **continue to rise** in the Manufacturing industry

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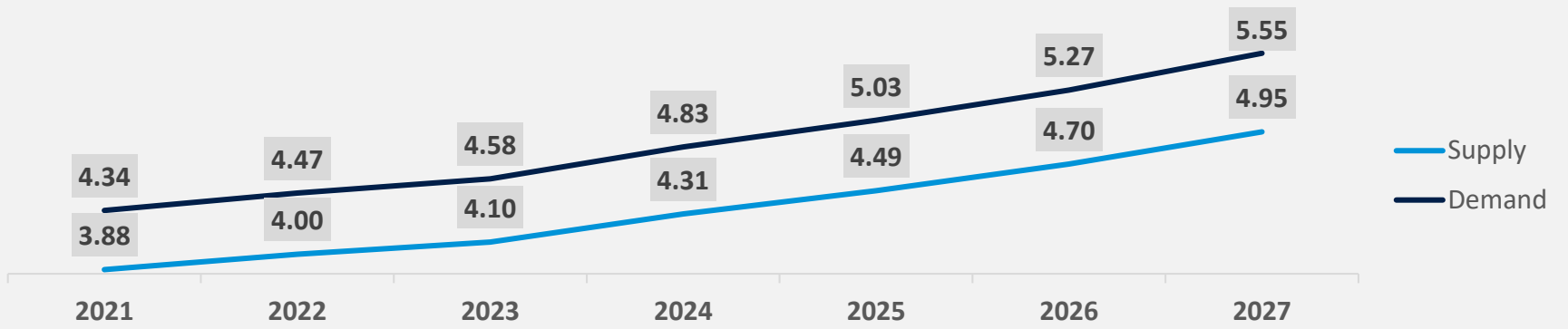
Source: Draup

Manufacturing workers Demographics: Manufacturing industry accounts for almost three-fourth of the male frontline workforce compared to female talent, and the gender gap is expected to increase over the next few years

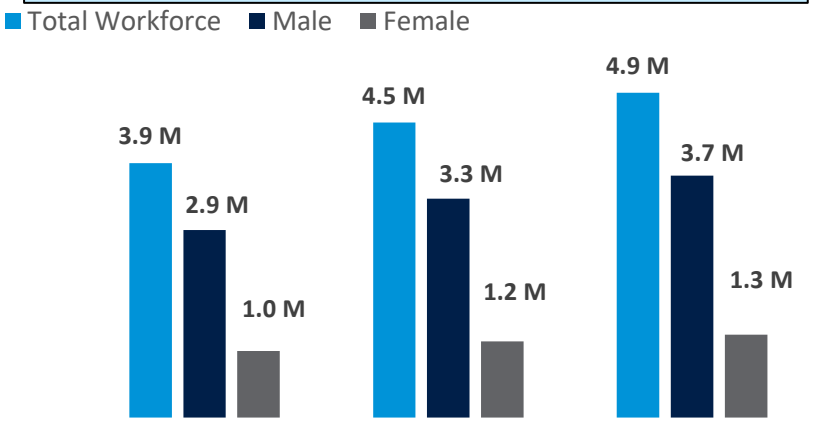
Frontline Workers Supply – Demand Projections of Manufacturing Industry (Numbers in Millions)



Key Insights

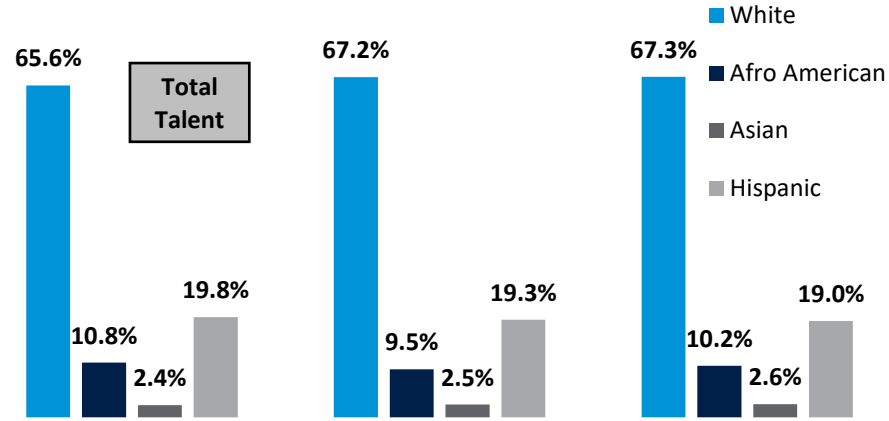
- ***The Total Demand in Manufacturing industry*** *is expected to increase by* ***28%*** *from 2021 to 2027*
- ***Across all the analyzed industries,*** *Manufacturing industry has the* ***maximum share of ethnicity in White professionals,*** *i.e.,* ***more than 65.0%*** *of the total workforce in US*

Gender Representation of Manufacturing Industry



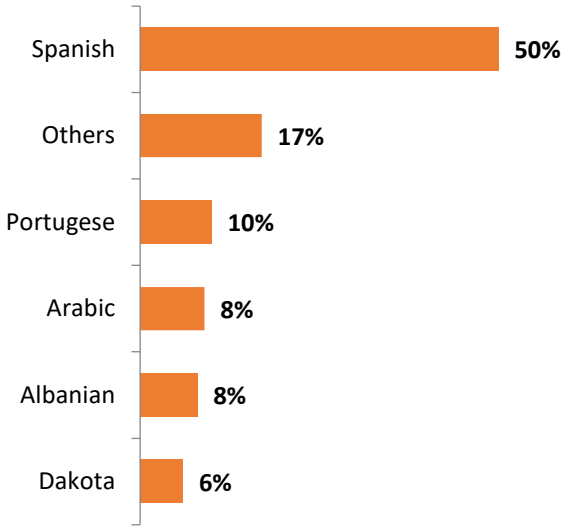
Year	2021	2025	2027
Total	3.9 M	4.5 M	4.9 M
Male	73.8%	74.2%	74.5%
Female	26.2%	25.8%	25.5%

Ethnicity Representation of Manufacturing industry



2021	2025	2027
3.9 M	4.5 M	4.9 M

% Representation of Foreign Languages of Manufacturing industry



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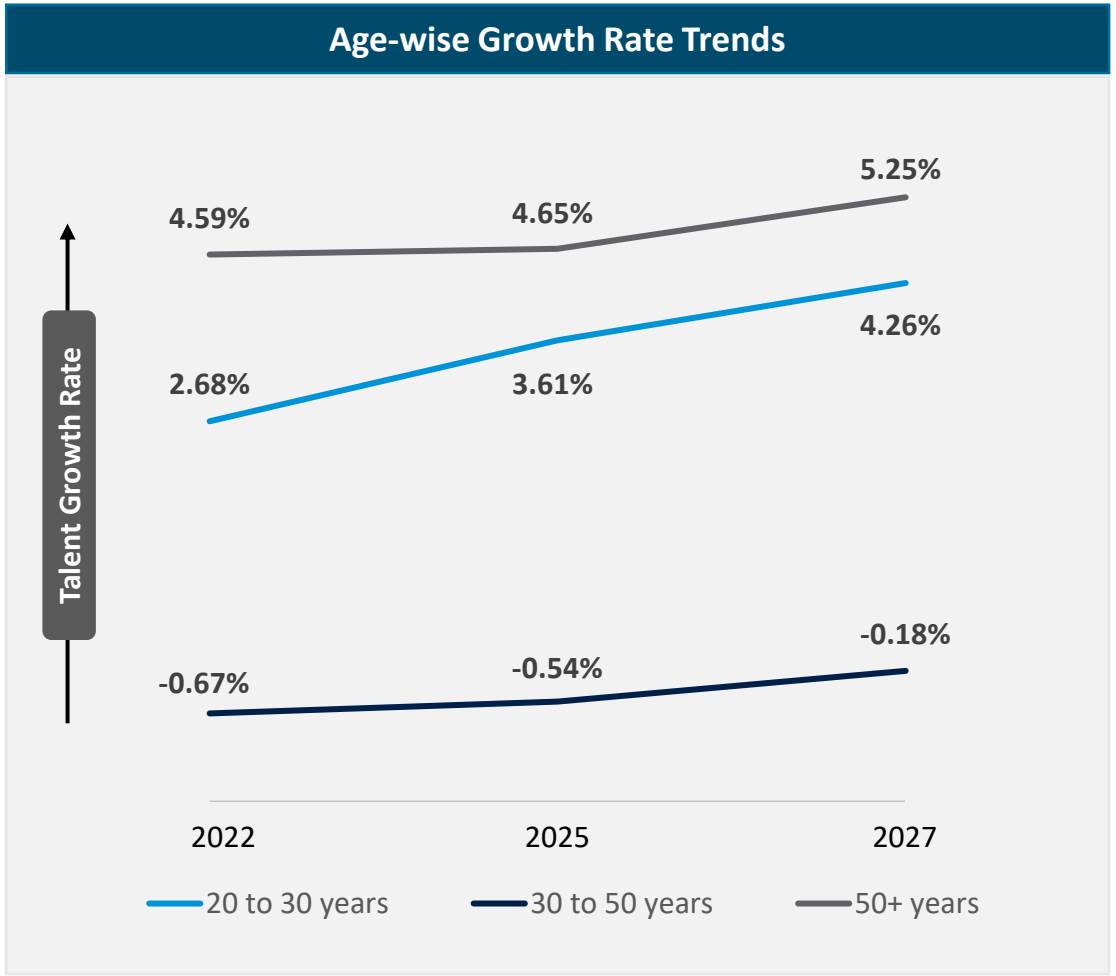
Source: Draup

Mechanics workers Age-wise Growth Rate: Among the age groups, Mechanic frontline workers with the age over 50 years have the highest growth rate compared to other age groups and it is expected to become consistent over the next 3-5 years

draup

Mechanics workers Age-wise Projected Growth Rate Trends



2025				
Age Group	Total Talent in 2021	Incoming Talent (2021-2025)	Outgoing Talent (2021-2025)	Total Talent in 2025
20-30	0.78 M	0.32 M	0.21 M	0.90 M
30-50	1.04 M	0.19 M	0.21 M	1.02 M
50+	0.86 M	0.28 M	0.11 M	1.04 M

2027				
Age Group	Total Talent in 2025	Incoming Talent (2025-2027)	Outgoing Talent (2025-2027)	Total Talent in 2027
20-30	0.90 M	0.21 M	0.13 M	0.98 M
30-50	1.02 M	0.05 M	0.05 M	1.01 M
50+	1.04 M	0.16 M	0.06 M	1.14 M

Key Insights

- The **overall growth rate** in the Mechanics industry will **continue to rise** over the next few years due to the considerable growth in the 20 to 30 years and 50+ years of age group
- The growth rate in the **30 to 50 years** of age group will increase however it will still stay in the **negative region**

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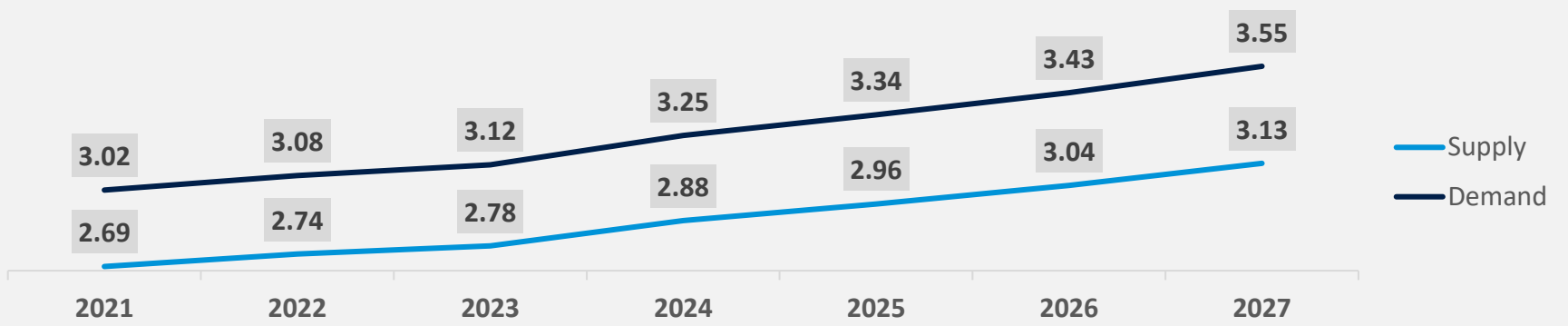
Source: Draup

Mechanics workers Demographics: Across all the analyzed industries, Mechanics occupation has the maximum share of male professionals, i.e., more than 95.0% of the total frontline workforce in US

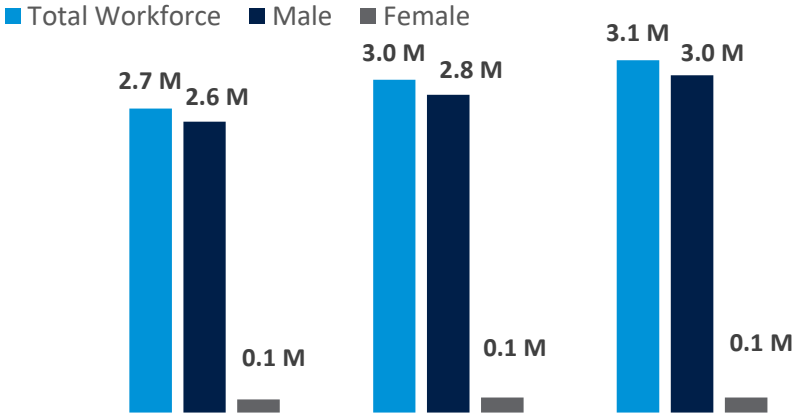
Frontline Workers Supply – Demand Projections of Mechanics Workers (Numbers in Millions)



Key Insights

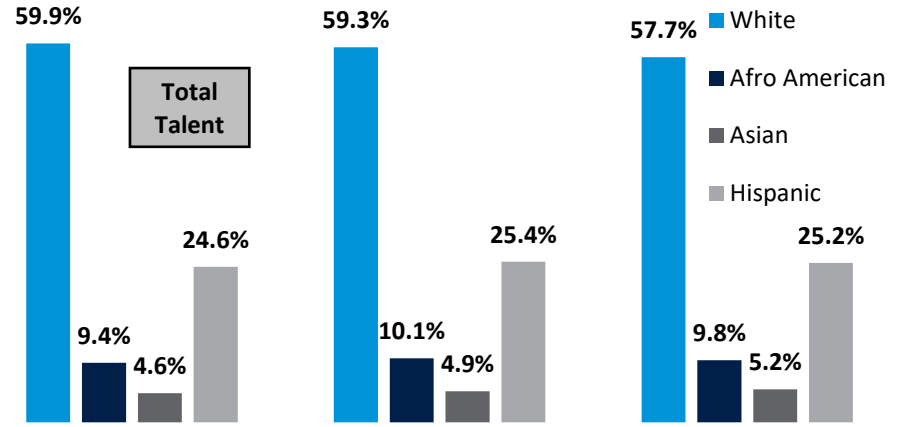
- ***Demand – Supply gap*** *is expected to* ***increase by 27%*** *from the year 2021 to 2027 in the Mechanics occupation*
- ***Afro American and Hispanic professionals*** *combined account for* ***more than one-third*** *of total US frontline workforce* ***in the Mechanics occupation***

Gender Representation of Mechanics Workers



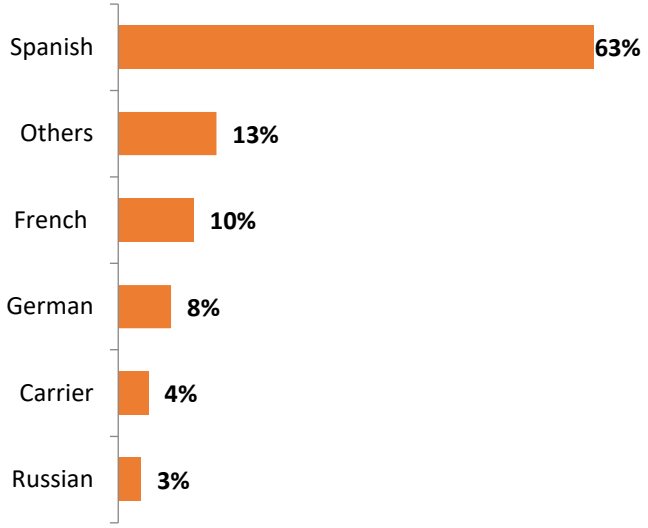
Year	2021	2025	2027
Total	2.7 M	3.0 M	3.1 M
Male	95.7%	95.5%	95.7%
Female	4.3%	4.5%	4.3%

Ethnicity Representation of Mechanics Workers



2021	2025	2027
2.7 M	3.0 M	3.1 M

% Representation of Foreign Languages of Mechanics industry



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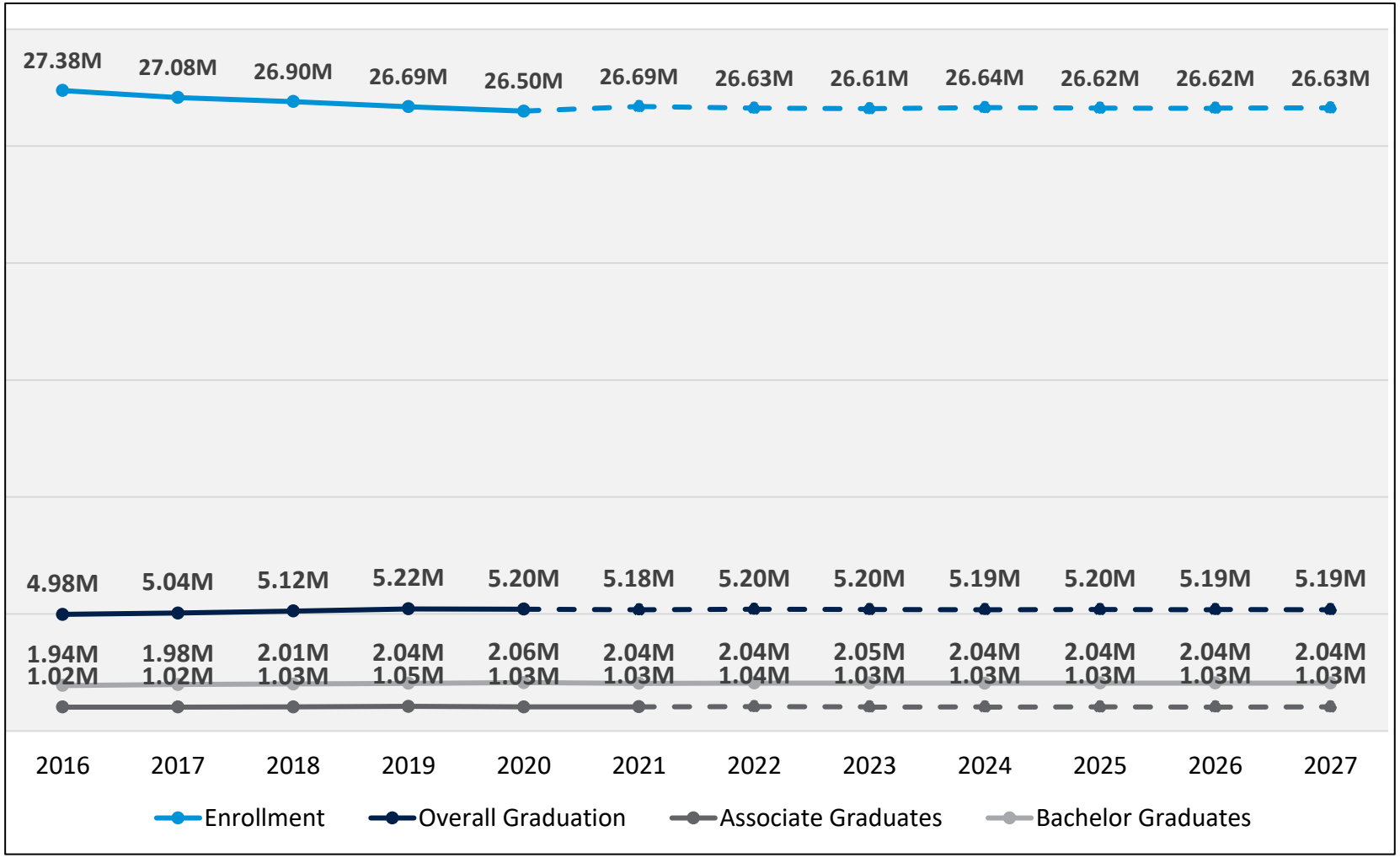
Note: Demographic trends are derived from an analysis of data from BLS (Bureau of Labor Statistics - USA). Draup's Proprietary Model analysis, research papers from EEOC, International Union for Scientific Study of population. The represented data has been fetched from the report 'A Basic Demographic Profile of Workers in Frontline Industries'. Draup's proprietary talent module analyzed the diversity metrics across the talent pool in US. Talent supply is the total installed/ available talent specific to a region. Talent Demand is the aggregate sum of the total talent supply and the unique unfilled job postings.

Source: Draup

Graduation Vs Enrolment Analysis: Over the years, the dropout rate across the US has been falling; a Higher degree completion rate indicates that the upcoming workforce would be more skilled and competitive in terms of skills

Overall Graduation and Enrolment trends (2016-2027) for the USA)



Key Insights

- *Overall college enrolments have been slightly **decreasing** over the years*
- *Despite the decrease in Enrolments, the overall **graduation numbers have increased over the years**, indicating an increase in degree completion rate*
- *The overall status dropout rate* decreased from **8.3%** in 2010 to **5.1%** in 2019*
- *The status dropout rate* declined for Hispanic (from **16.7 to 7.7%**), American Indian/Alaska Native (from **15.4 to 9.6%**), African American (from **10.3 to 5.6%**), White (from **5.3 to 4.1%**), Asian (from **2.8 to 1.8%**), and of Two or more races (from **6.1 to 5.1%**)*
- *The U.S. average ACGR (adjusted cohort graduation rate) for public high school students **increased from 79 percent in 2010–11 to 86 percent in 2018–19***
- *In the upcoming years, the **enrollment and graduation rate is expected to stay stagnant** at a given value with very less variation*

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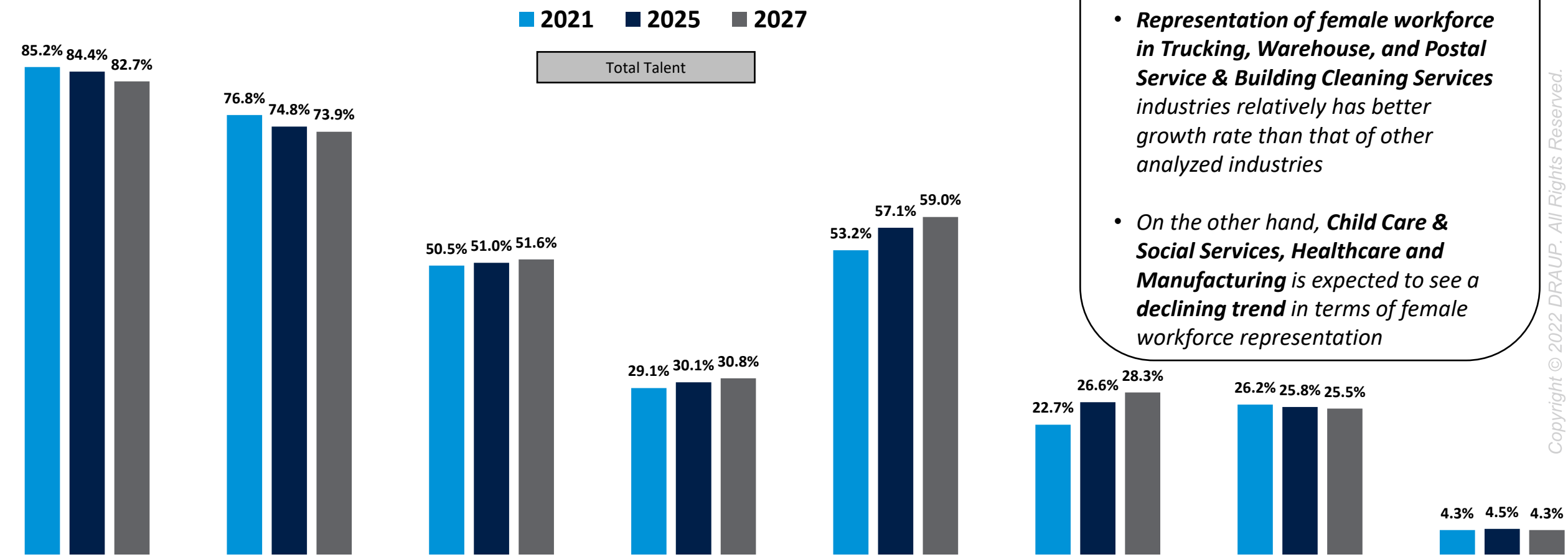
Note: The status dropout rate* represents the percentage of 16- to 24-year-olds who are not enrolled in school and have not earned a high school credential (either a diploma or an equivalency credential such as a GED certificate). The data from 2021 is projected data calculated using the moving averages method.
Source: The data has been sourced from the official National Centre for Education Statistics survey results

Source: Draup

Frontline Industries gender diversity analysis: Across analyzed frontline industries, it is evident that over the next few years, Grocery, Convenience, and Drug store, Public transit, Building-cleaning services, and Trucking, warehouse & postal services will have higher female representation than that of today

Representation of Female across analyzed Frontline Industries



Key Insights

- ***Representation of female workforce in Trucking, Warehouse, and Postal Service & Building Cleaning Services*** *industries relatively has better growth rate than that of other analyzed industries*
- *On the other hand,* ***Child Care & Social Services, Healthcare and Manufacturing*** *is expected to see a* ***declining trend*** *in terms of female workforce representation*

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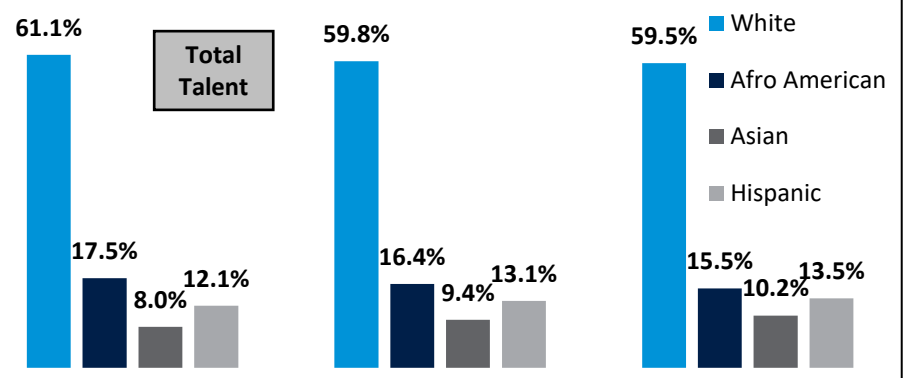
Child Care and Social Services			Healthcare			Grocery, Convenience, and Drug Stores			Public Transit			Building Cleaning Services			Trucking, Warehouse, and Postal Service			Manufacturing			Mechanics		
2021	2025	2027	2021	2025	2027	2021	2025	2027	2021	2025	2027	2021	2025	2027	2021	2025	2027	2021	2025	2027	2021	2025	2027
3.3 M	3.8 M	4.1 M	16.1 M	17.3 M	17.8 M	6.8 M	7.7 M	8.3 M	0.7 M	1.0 M	1.2 M	1.4 M	1.5 M	1.6 M	3.1 M	3.8 M	4.3 M	3.9 M	4.5 M	4.9 M	2.7 M	3.0 M	3.1 M

Note: Draup's proprietary talent module analyzed the diversity metrics across the talent pool. The above insights are curated through government official platform Bls.Gov and various strategic and tactical signals from news articles, journals, research papers and industry reports. The numbers reported year on year in millions represent the overall talent numbers for various frontline industries

Source: Draup

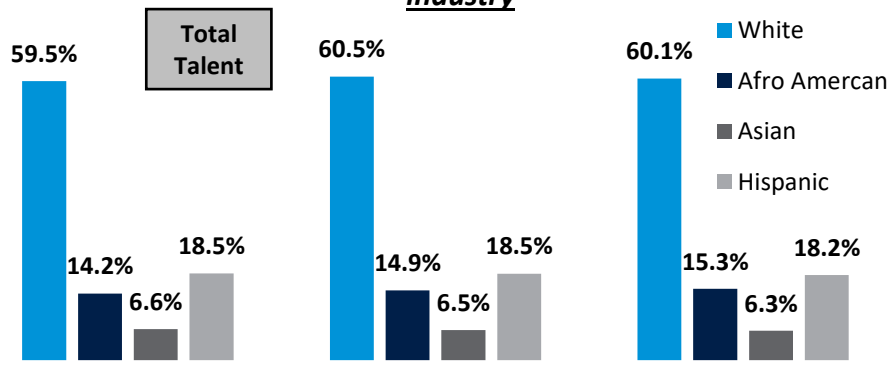
Frontline Industries Ethnic diversity analysis(1/2): Across analyzed frontline industries, it is observed that the majority of professionals accounting for approximately more than 50% of total talent belong to White ethnicity

Ethnicity Representation of Healthcare industry



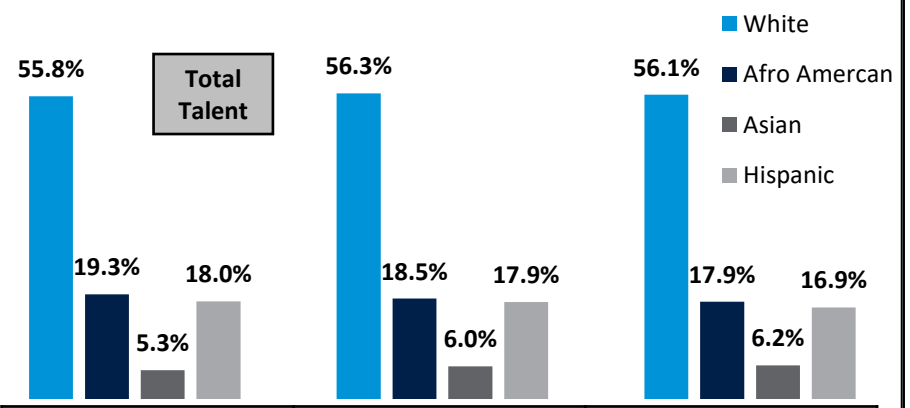
2021	2025	2027
16.1 M	17.3 M	17.8 M

Ethnicity Representation of Grocery, Convenience, and Drug Stores industry



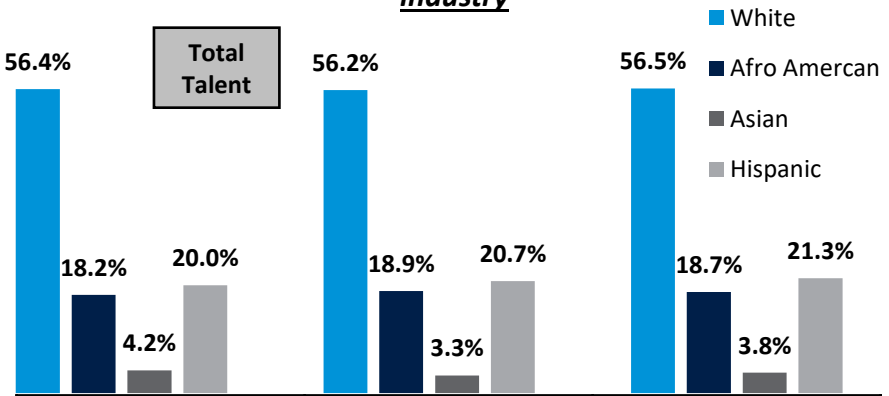
2021	2025	2027
6.8 M	7.7 M	8.3 M

Ethnicity Representation of Child Care and Social Services industry



2021	2025	2027
3.3 M	3.8 M	4.1 M

Ethnicity Representation of Trucking, Warehouse, and Postal Service industry



2021	2025	2027
3.1 M	3.8 M	4.3 M

Key Insights

- ***The grocery, Convenience, and Drug Stores*** *industry has close to* ***60% of white professionals*** *in their workforce*
- ***Asian professionals*** *in all the analyzed frontline industries have a minimum share of ethnicity, i.e.,* ***less than 10%*** *of the total workforce*
- *On average,* ***Afro American and Hispanic professionals*** *in all the analyzed frontline industries approximately accounts for* ***30-45%*** *of the total workforce*

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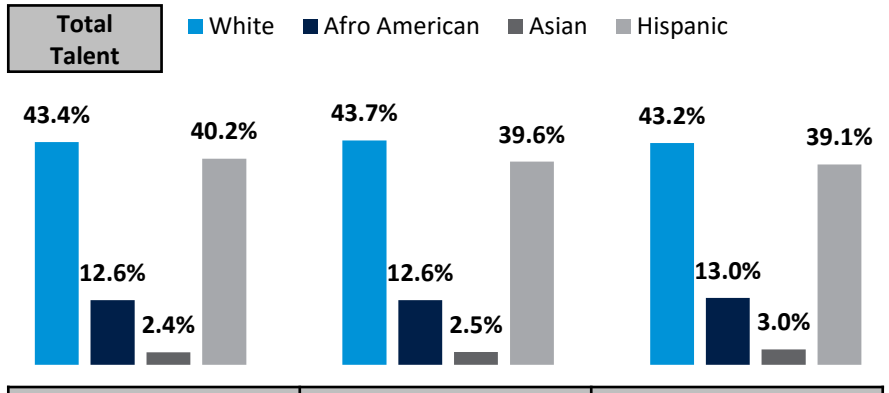
Note: Draup's proprietary talent module analyzed the diversity metrics across the talent pool. The above insights are curated through government official platform Bls.Gov and various strategic and tactical signals from news articles, journals, research papers and industry reports. The numbers reported year on year in millions represent the overall talent numbers for various frontline industries

Source: Draup

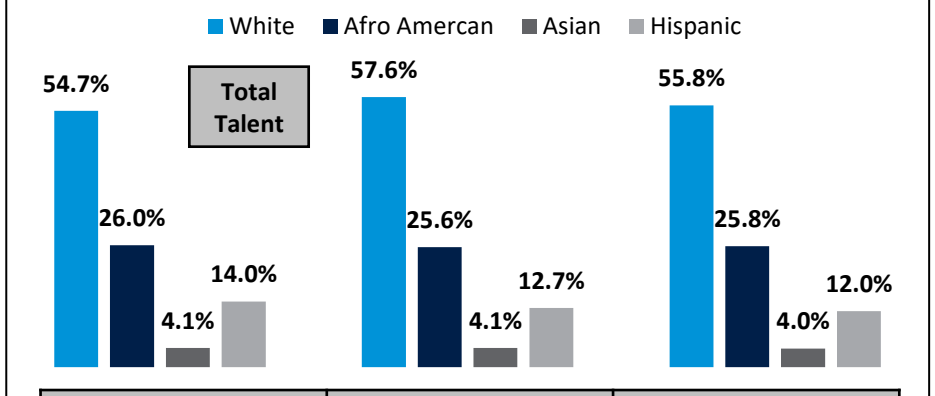
Frontline Industries Ethnic diversity analysis(2/2): Apart from the Public transit industry, the share of Hispanic frontline talent is higher across Building, Cleaning Services, Manufacturing & Mechanics frontline industry

Ethnicity Representation of Building Cleaning Services industry



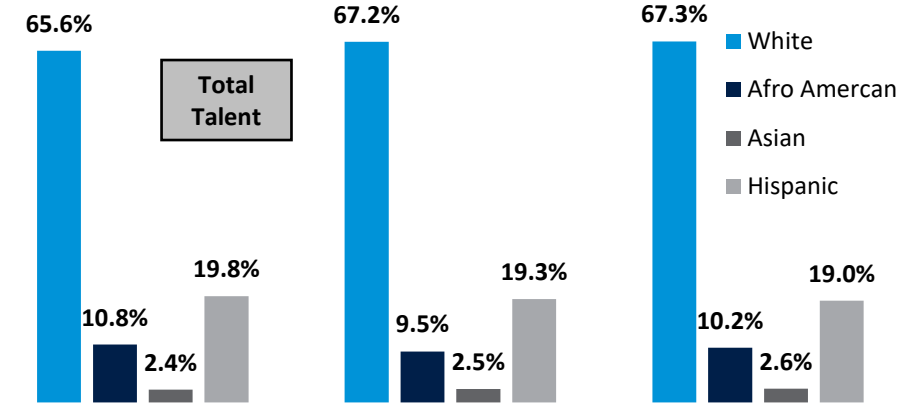
2021	2025	2027
1.5 M	1.5 M	1.6 M

Ethnicity Representation of Public Transit industry



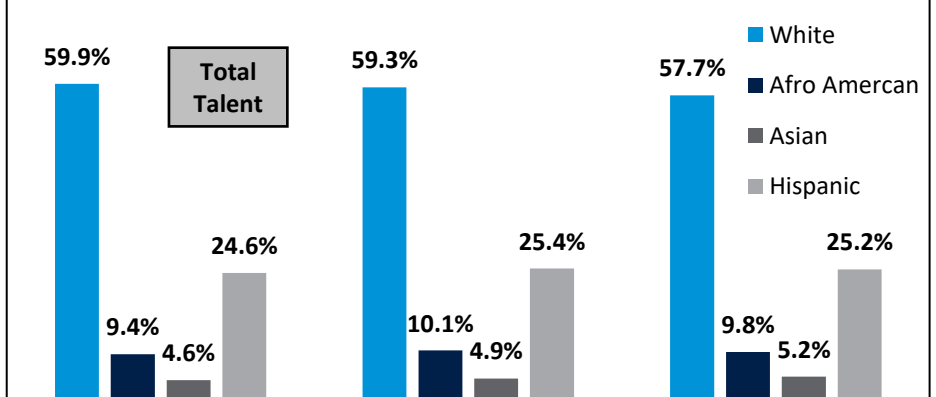
2021	2025	2027
0.8 M	1.0 M	1.2 M

Ethnicity Representation of Manufacturing industry



2021	2025	2027
3.9 M	4.5 M	4.9 M

Ethnicity Representation of Mechanics industry



2021	2025	2027
2.7 M	3.0 M	3.1 M

Key Insights

- ***The Manufacturing*** *industry has more than* ***65% of white professionals*** *in their workforce*
- ***In the non-white ethnicity, Hispanic professionals*** *in all the analyzed frontline industries have relatively higher representation in the total workforce*
- *The* ***public Transit*** *industry accounts for more than* ***25% Afro American professionals*** *in their workforce*
- *Across all the analyzed industries,* ***Asian professionals have a low share of ethnicity***

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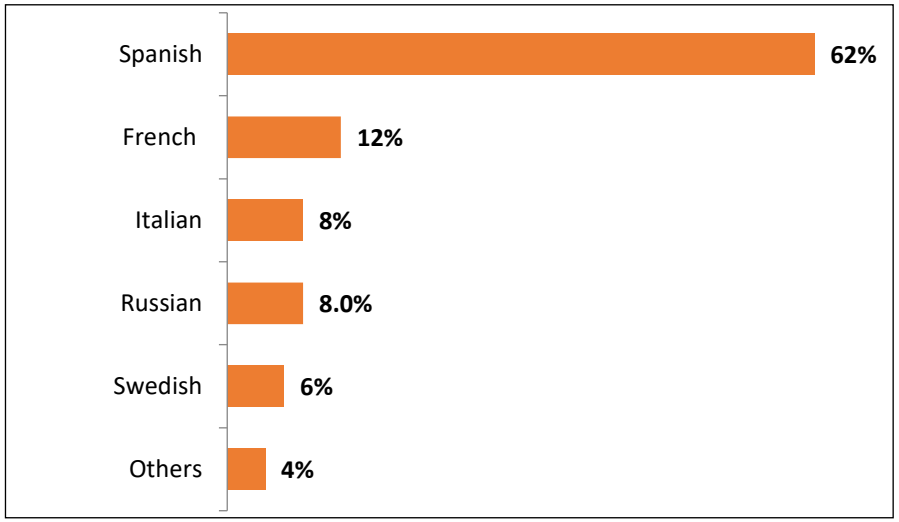
Note: Draup's proprietary talent module analyzed the diversity metrics across the talent pool. The above insights are curated through government official platform Bls.Gov and various strategic and tactical signals from news articles, journals, research papers and industry reports. The numbers reported year on year in millions represent the overall talent numbers for various frontline industries

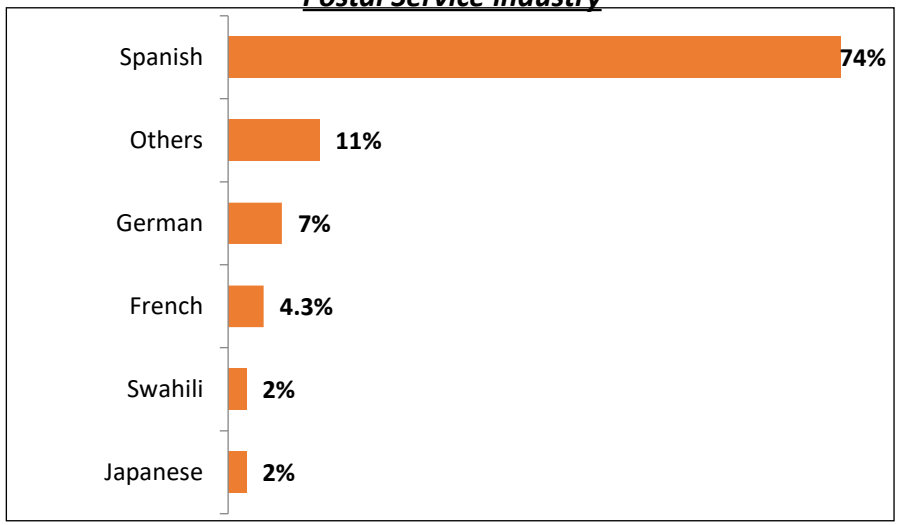
Source: Draup

Foreign language analysis(1/2): Spanish is one of the most common foreign languages spoken by professionals working in analyzed frontline industries

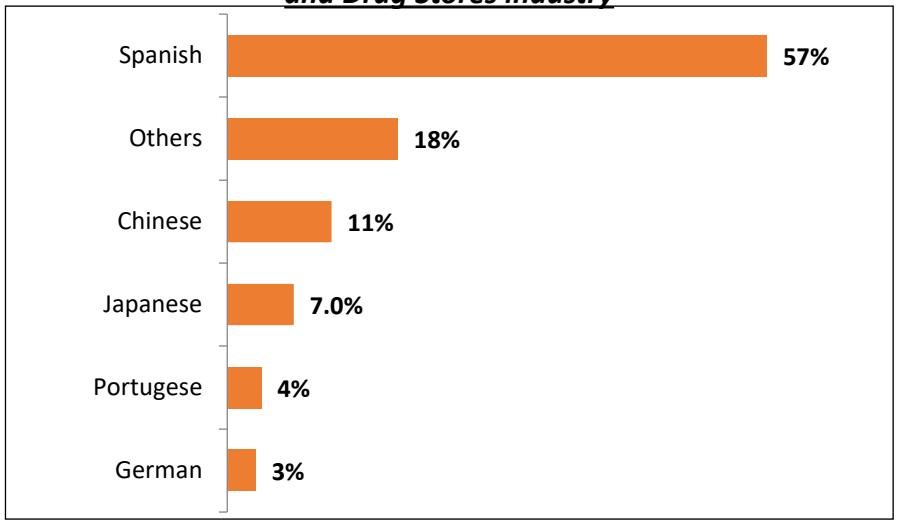
% Representation of Foreign Languages of Healthcare industry



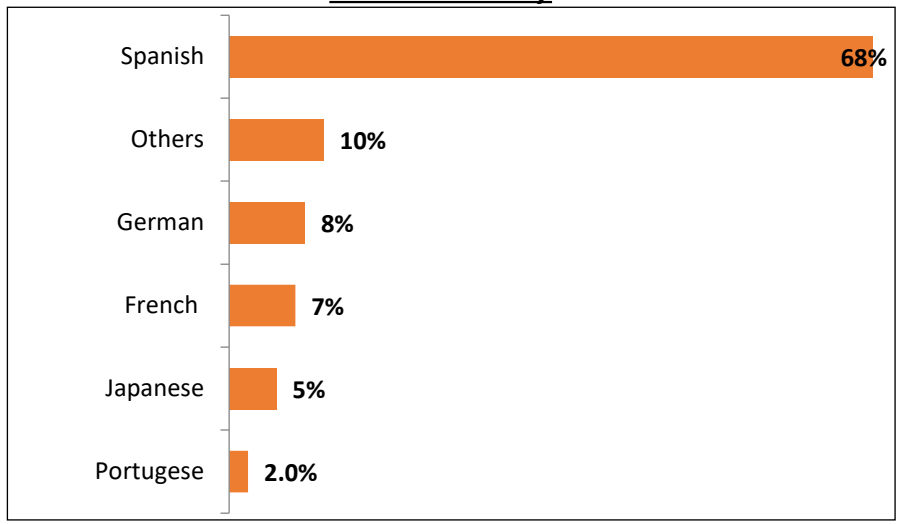
% Representation of Foreign Languages of Trucking, Warehouse, and Postal Service industry



% Representation of Foreign Languages of Grocery, Convenience, and Drug Stores industry



% Representation of Foreign Languages of Child Care and Social Services industry



Key Insights

- *On average more than **55%** of professionals working in the frontline industries know **Spanish** as a foreign language*
- *After Spanish, **French, and German** are the two common languages which are seen in the professionals working in the analyzed frontline industries*
- *Foreign languages such as **Japanese, Portuguese, Swahili** have **significantly less presence** in comparison with other languages*
- *Over the coming years **need for foreign language speakers is expected to increase.***
- *Keeping in line with the increasing demand for foreign language proficiency, **the supply of foreign language speakers is expected to increase but at a lower rate***
- ***Increased preference for language learning, increase in migrant worker percentages** would be the **major reasons** for the shift.*

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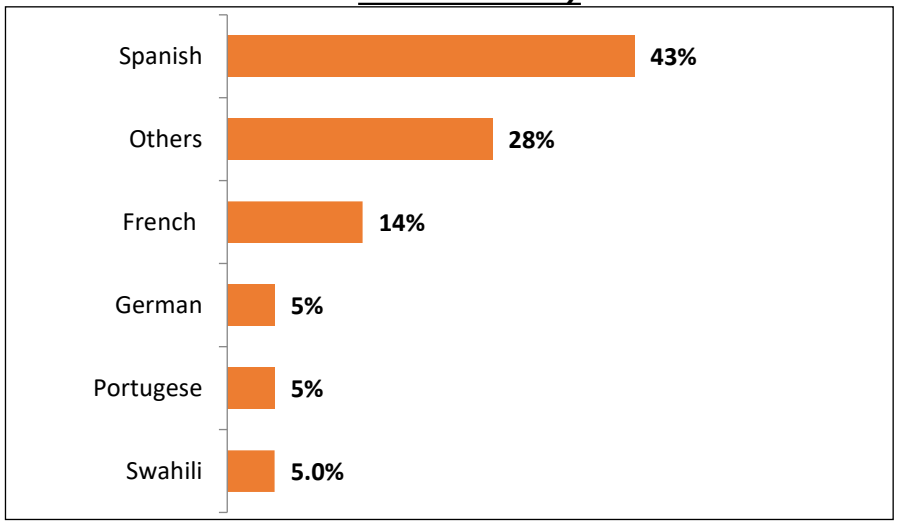
Note: The above information is derived from Draup's proprietary talent module which tracks 750M+ profiles and is cross verified with publicly available articles, Government portals/websites, research papers and industry reports

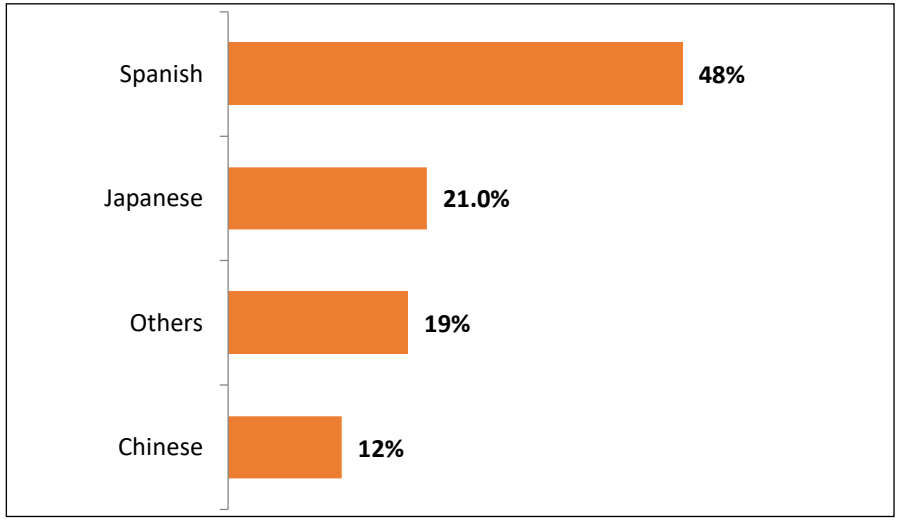
Source: Draup

Foreign language analysis(2/2): After Spanish, French and German are the most common languages spoken by frontline workers; Japanese is the second most common language in the public transit industry

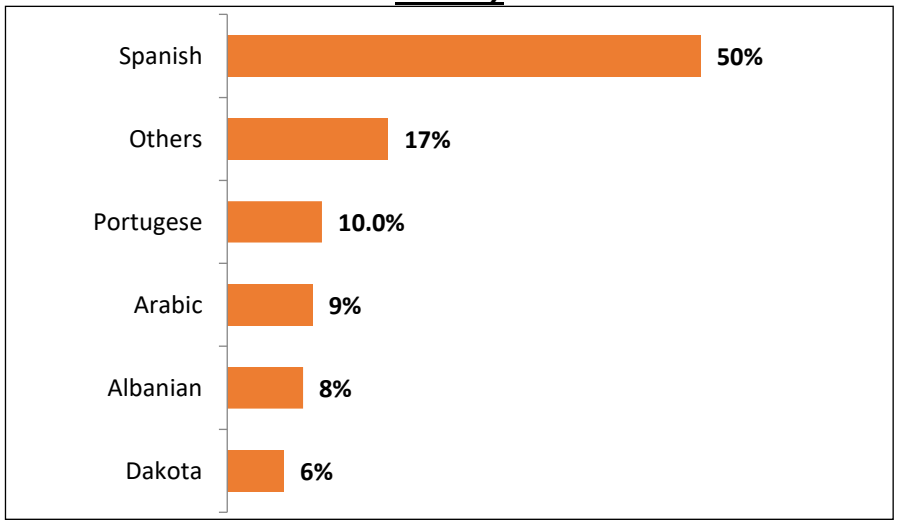
% Representation of Foreign Languages of Building Cleaning Services industry



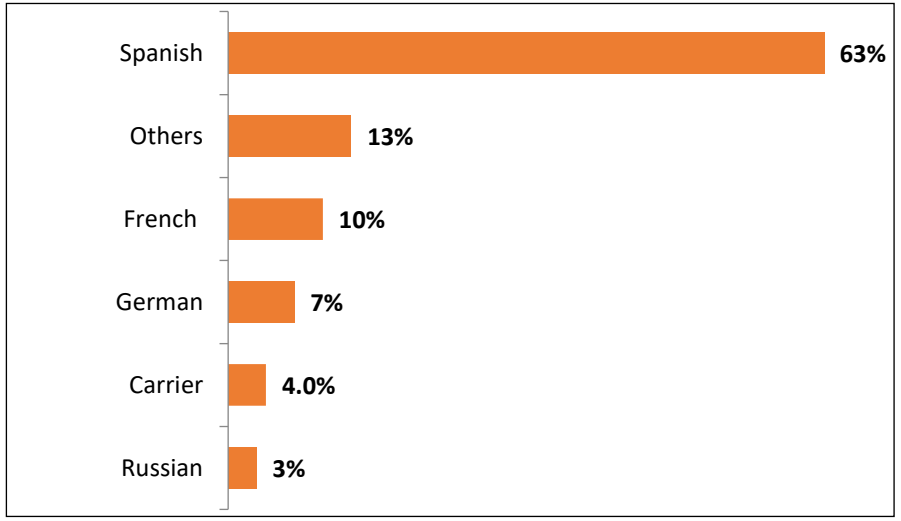
% Representation of Foreign Languages of Public Transit industry



% Representation of Foreign Languages of Manufacturing industry



% Representation of Foreign Languages of Mechanics industry



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Source: Draup

Note: The above information is derived from Draup's proprietary talent module which tracks 750M+ profiles and is cross verified with publicly available articles, Government portals/websites, research papers and industry reports

CDL Truck Drivers Analysis

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Source: Draup

Job Roles and Technical Competencies: Draup leveraged its database of 750Mn+ talent profiles and 65mn+ job descriptions to identify the skills and workloads for CDL Driver

Job Roles Responsibilities & Skills (Not exhaustive)
CDL Driver
• Deliver products to stores on an established or contingency route or via dynamic dispatch to customers • Drives the delivery vehicle to a location, unloads and brings products into the store • Responsible for ongoing rotating and stocking of products on store shelves, displays, vending equipment, and in coolers • Builds small displays and sets up promotional materials such as pricing signs and banners • Generates invoices and is responsible for daily settlement of cash and charges • Follow DOT regulations and maintain positive working relationships with primary contact at each account
Adjacent Job Titles
Driver Warehouse, Route Driver, Online Delivery Pickup Associate, Driver, Truck Driver Delivery, Delivery Driver, CDL Delivery Driver, Aggregate Delivery Driver, Tractor Trailer Operator, Semi drive, Log Truck Driver and Package Delivery Driver

CDL Drivers Skillsets/Capabilities
● CDL license holder
● Traffic laws/DOT regulations/driving knowledge
● Preventive maintenance/meeting delivery schedules
● Adherence to company policies
● Understanding of Federal Regulations
● Understanding of GPS/Navigation system
● Documentation of delivery & fueling records
● Communication
● Loading/Unloading Cargo
● Ability to lift/pickup heavy items
● Dependability
● OTR experience

Intensity ● High ● Medium

Source: Draup's talent simulation module has a database of 750M+ professional profiles and 65M+ job descriptions. Relevant job clusters are modelled using Draup's proprietary taxonomy for each country, city and company level. The indicated workloads are not exhaustive.

Source: Draup

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CDL Drivers Employment trends: MSAs such as New York City (64,700), Chicago (56,800) and Houston (55,500) have the largest CDL talent pool in the US. The talent growth rate for CDL drivers is relatively high in San Francisco, Houston, and Denver

MSAs	Employed Talent*	Growth Rate (2019-2022)[1]	Median Hourly Wages*	Annual Median Wages*
United States	**1,306,300**	**-0.05%**	**$22.66**	**$48,710**
Greater New York City Area	64,700	-1.69%	$26.73	$55,600
Greater Chicago Area	56,800	0.75%	$24.70	$51,400
Houston, Texas Area	55,500	4.84%	$22.47	$46,740
Greater Atlanta Area	54,200	1.71%	$23.71	$49,320
Greater Los Angeles Area	52,200	0.70%	$23.70	$49,290
Dallas/Fort Worth Area	42,300	-0.02%	$23.34	$48,540
Greater Philadelphia Area	32,800	1.36%	$24.36	$50,660
Inland Empire[#]	29,800	1.53%	$24.22	$50,370
Greater Detroit Area	29,100	0.32%	$22.16	$46,090
Phoenix, Arizona Area	27,300	3.29%	$22.97	$47,770
Greater Seattle Area	23,500	-1.73%	$26.95	$56,050
Charlotte, North Carolina Area	20,300	-0.85%	$22.59	$46,980
Washington D.C. Metro Area	19,400	0.00%	$23.78	$49,470
Greater Boston Area	18,500	-3.17%	$23.98	$49,890
San Francisco Bay Area	16,850	5.44%	$27.72	$57,650
Miami/Fort Lauderdale Area	16,800	-2.15%	$18.66	$38,820
Orlando, Florida Area	15,800	2.94%	$21.59	$44,900
Greater Minneapolis-St. Paul Area	15,000	-0.98%	$24.90	$51,790
Cleveland/Akron, Ohio Area	14,300	-0.48%	$22.97	$47,770
Greater St. Louis Area	13,500	0.76%	$24.12	$50,170
Portland, Oregon Area	13,300	-3.03%	$24.74	$51,450
San Antonio, Texas Area	13,200	-1.95%	$19.13	$39,780
Kansas City, Missouri Area	13,100	-1.69%	$23.50	$48,870
Greater Denver Area	13,000	4.50%	$25.53	$53,110

Score in Individual Parameter | High | Medium | Low

Note: *The employed talent, median wages have been derived from Draup's actively tracked database of 750M+ profiles across 5M+ organizations globally and have been further curated from the US Bureau of Labor Statistics website. Values have been rounded off. [1]Growth Rate is reported as CAGR for the period 2019-2022. [#]Inland Empire refers to Riverside-San Bernardino–Ontario metropolitan area

Source: Draup

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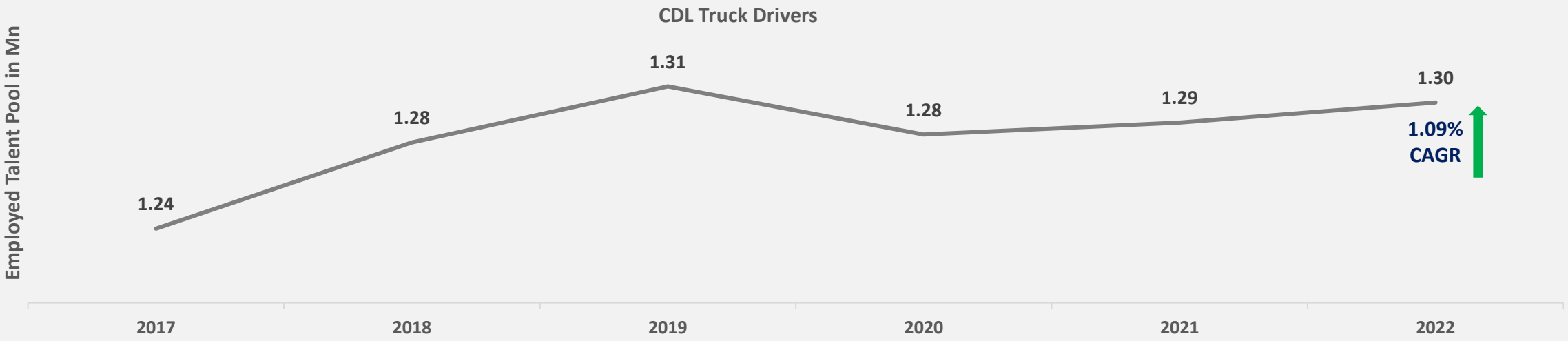
CDL Truck Driver Growth Rate and Automation: The overall growth rate for CDL truck drivers is positive; however, due to a higher concentration of late-career talent, the available man-hours have remained stagnant

CDL Truck Driver - Employed Talent & Growth Rate[3] (2017-2022)



Estimated Potential of AI Automation

Driverless Truck

2 Million Truck Drivers become Redundant

- The International Transport Forum warned that more than 2 million truck drivers in US and Europe could find themselves redundant by 2030

Automation Achieved Till Date

1.1[2] M Drivers to be hired over 10 years

- US is facing a severe shortage of truck drivers. The industry will need to hire 1.1M drivers over 10 years to keep up with demand
- As per FMCSA*,number of drivers at carriers with up to 100 trucks declined by 150,172 between July &October 2019

Since **more than 75% of CDL drivers** fall in the late-career **age group of 40+ yrs**. Therefore the **number of hours** spent by these truck drivers is **relatively low** compared to the younger age group (less than 40 yrs.). Therefore, despite the positive talent growth rate. There is a **shortage of talent pool**

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Source: 1) UC Berkely Labor Center Research Report 2) Bloomberg 3) The Employed talent in different job roles is sourced from US Bureau of Labor Statistics .

Source: Draup

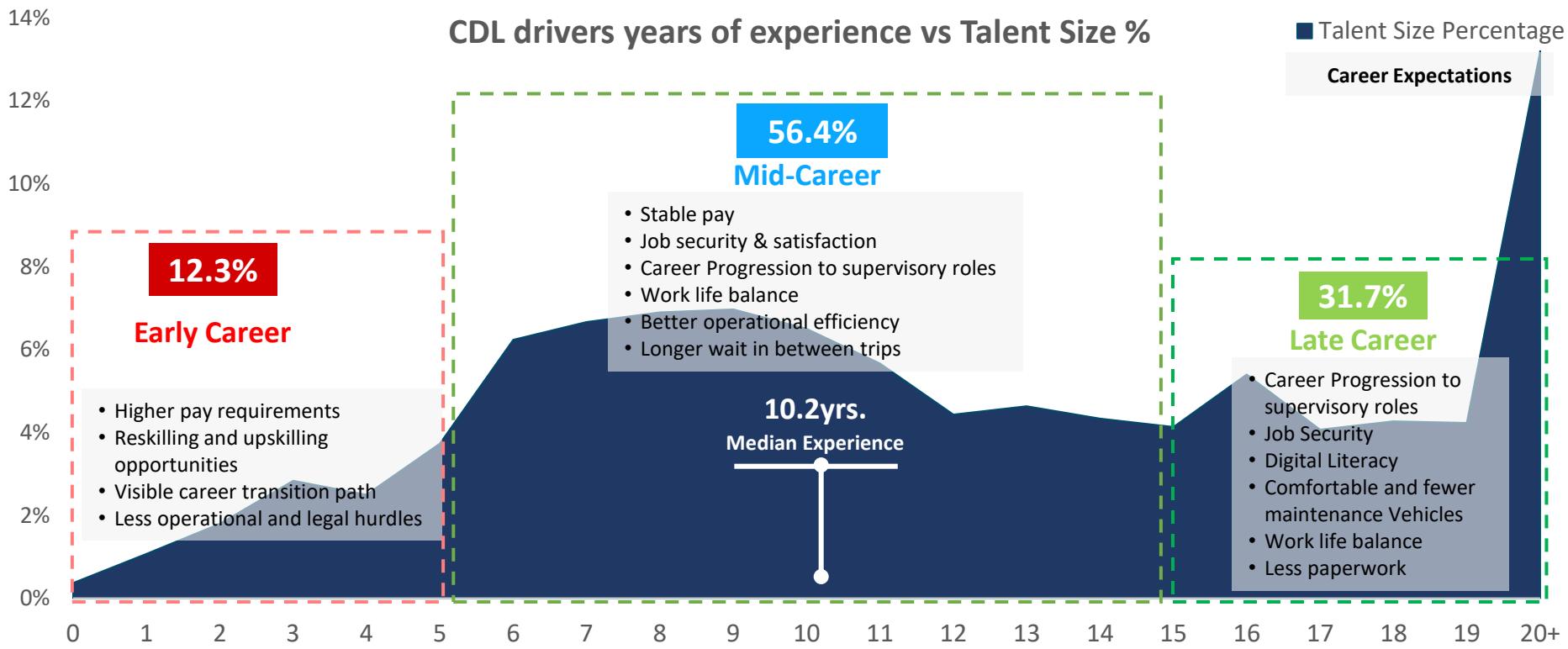
CDL Driver Talent Analysis: More than 88% of CDL drivers have work experience greater than 5 years whereas 75% CDL drivers are in the age group of >40 years

Draup identified 1.3M+ CDL drivers and analyzed the share of workforce by years of experience

Median years of experience for CDL drivers in the US is **10.2 years**

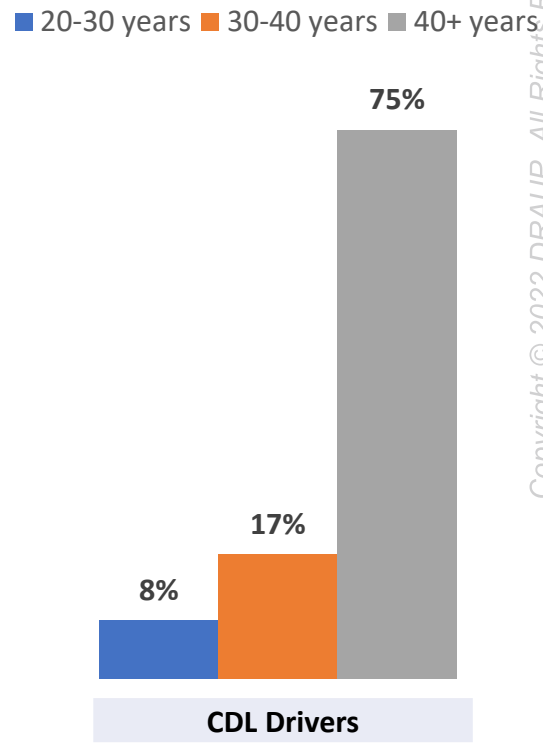
Share of **mid-career CDL driver** talent is high at **56.4%** with an experience range of more than **5 yrs.**

414,084 CDL drivers have >15+ yrs. of experience. This talent pool is very experienced and can be **transitioned to supervisory roles** in a warehouses



CDL Driver Generation Breakdown

3/4th CDL drivers fall in the age group of **40+ yrs.**



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Source: The sentiments and challenges have been sourced from Draup's proprietary signal tracker which tracks 2M+ news articles, industry reports, magazines, and digital intentions of companies. The years of experience, talent size and possible transitions have been sourced from Draup's Proprietary Talent Module that tracks that tracks 750Mn+ talent profiles

Trucking Industry Current Scenario & Recommendations: Mentorship programs, investing in technologies, supporting drivers' mental health and providing competitive pay to drivers are some of the recommendations to improve trucking industry

Trucking industry Current scenario and Road Ahead

The average age of overall truck drivers in the US is **55 yrs.**

60% of all truck drivers today are over 45 years old, and more than 20 percent are over 55 yrs.

In the next 10 years, 25 percent of truck drivers **will hit retirement age**

American Trucking Association estimates that fleets will be **short of 160,000 drivers by 2028**

Recommendations to improve Trucking Industry

Create a mentorship program to build community between new and veteran drivers

- Set up a buddy system or mentor program where more senior team members are paired with a new recruit can foster a sense of community and support
- Seek out online communities that are explicitly made to nurture a sense of fellowship and community

Invest in improving communication with drivers and optimizing routes

- Messaging tools between drivers and dispatchers helps to reduce errors, cut down on wasted time and increase on-time deliveries
- Shortening trip times and routes is one way to get both freight delivered and see that drivers have more time at home

Help support drivers' mental health

- Encourage drivers to get enough sleep and exercise and to spend time outdoors or use other techniques like mediation to reduce stress
- Support the need for drivers to take leave for treatment and look for opportunities to bring people together during the holidays

Provide competitive pay, raises, and reward top performers

- Provide regular pay increases and upward mobility to keep the truck drivers motivated
- Reward top performing drivers and identify stellar drivers based on a variety of factors such as speeding, seat belt usage, braking habits and acceleration

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Note: . The above insights are curated through various strategic and tactical signals from news articles, journals and blogs. The above analysis has been validated using Draup's ML model which analyses 2 M+ publications, Industry reports, and news articles every week.

Source: Draup