

CRITICAL ISSUES IN THE TRUCKING INDUSTRY – 2023



Prepared by

The American Transportation Research Institute

October 2023



Atlanta, GA • Minneapolis, MN • Washington, DC • Sacramento, CA

ATRI@trucking.org
TruckingResearch.org

ATRI BOARD OF DIRECTORS

Derek Leathers

Chairman of the ATRI Board
Chairman, President and CEO
Werner Enterprises

Andrew Boyle

Co-President
Boyle Transportation

Jim Burg

President
James Burg Trucking

Hugh Ekberg

President and CEO
CRST International, Inc.

Robert E. Low

President and Founder
Prime Inc.

Benjamin J. McLean

Chief Executive Officer
Ruan Transportation
Management Systems

Dennis Nash

Executive Chairman of the
Board
Kenan Advantage Group

Brenda Neville, CAE

President and CEO
Iowa Motor Truck Association

Srikanth Padmanabhan

President, Engine Business
Cummins Inc.

Lou Riviuccio

President, Corporate
Transportation
UPS

John A. Smith

President and CEO, U.S. and
Canada Ground Operations
FedEx Express

Rebecca Brewster

President and COO
ATRI

Chris Spear

President and CEO
American Trucking Associations

ATRI RESEARCH ADVISORY COMMITTEE

Ben Banks, RAC Chairman

Vice President, Operations
TCW, Inc.

Colin Abernathy

Director of Performance and
Analytics
Groendyke Transport, Inc.

Brent Allred

Transportation Practice Leader
and Managing Director
Higginbotham Transportation
Services

Andrew Andrusko

Statewide Freight Planning
Director
Minnesota Department of
Transportation

Renee Bowen

Principal
Franklin & Prokopik, P.C.

Tony Bradley

President and CEO
Arizona Trucking Association

Michael Bray

Chief Commercial Officer
Platform Science

Joyce Brenny

President and CEO
Brenny Transportation, Inc.

Bree Bryant

Vice President of Safety
Eagle Transport Corp.

Mark Colson

President and CEO
Alabama Trucking Association

Mark Doughty

President and CEO
PrePass Safety Alliance

Evangelos Kaiser

Director, Freight Mobility
Research Institute
Florida Atlantic University

Jackie Kelly

Senior Federal Affairs
Representative
FedEx Corp.

Mike Ludwick

Chief Administrative Officer
Bison Transport

Ken Marko

Fleet Sustainability Senior
Manager
US Foods

Bob Meyer

Vice President of Transportation
UPS

Andrew Mills

Vice President of Operations
TrueNorth Companies

Andrew Owens

CEO – Manager
A&M Transport

Andrew Petrofsky

Vice President
J&M Tank Lines

Dustin Ragon

Lieutenant, Commercial Carrier
Enforcement
Wyoming Highway Patrol

Jose Samperio

Vice President and General
Manager – North America On-
Highway
Cummins Inc.

Jon Samson

Executive Director, Agricultural
and Food Transporters
Conference
American Trucking Associations

Amanda Schuier

Director of Employee
Engagement
Jetco Delivery

Andrea Serra

Senior Enterprise Product
Manager
CH Robinson

Kimberly Skelton

Senior Manager, Consumer
Insights
Pilot Flying J

Glissel Soliz

Director, Transportation
Operations & 3PL
Coca-Cola North America

Mike Stapleton

Vice President of Industry
Relations
ISAAC Instruments

Kerry Stritt

Vice President Fleet Services
Southeastern Freight Lines

Daniel Studdard

Principal Planner,
Transportation Access and
Mobility Division
Atlanta Regional Commission

Heather Sykes

Director of the Office of Supply
Chain, Professional, and
Business Services
U.S. Department of Commerce
International Trade
Administration

Gregg Troian

President
PGT Trucking

Stephen Truono

EVP and Chief Risk Officer
NFI Industries

Connie Vaughan

Manager, Government
Relations
McKee Foods

Tom Weakley

Director of Operations
Owner-Operator Independent
Drivers Association Foundation

Critical Issues in the Trucking Industry – 2023

This year has been one of economic challenges for the trucking industry and all Americans. High inflation drove up costs for consumers and producers alike, yet rising interest rates raised both borrowing rates and the cost of capital.¹ Meanwhile, pricing in all trucking sectors fell steadily over the year, hampered by soft performance in key industries including a poor produce season, generally flat housing and manufacturing output, and retail sales that were outpaced by inflation as retailers remained overstocked.² The total number of jobs in the industry began to fall over the summer for the first time since the start of the COVID-19 pandemic, and the number of registered carriers remained nearly flat after years of growth.³

It was also a year of disruptions in trucking. After a short-term decline in spring, fuel prices began another steep rise in summer due to a combination of geopolitical and environmental factors.⁴ The bankruptcy of one of the largest companies in the industry, Yellow, displaced 30,000 employees and shook up the less-than-truckload sector by releasing nine percent of market share.⁵ Union activity, which contributed to tensions at Yellow, UPS and Mack Trucks, mounted in the Fall when the United Auto Workers began striking at Big Three assembly and parts distribution centers.⁶

The industry also faced a number of new mandates at the state and federal levels designed to transition the nation's vehicle fleet to zero-emission vehicles. Given the overly ambitious timelines associated with these mandates, they have been met with some opposition from industry groups.⁷

¹ U.S. Bureau of Labor Statistics, "Consumer Price Index Summary" (September 13, 2023), <https://www.bls.gov/news.release/cpi.nr0.htm>; U.S. Bureau of Labor Statistics, *PPI Detailed Report* (August 2023), <https://www.bls.gov/ppi/detailed-report/ppi-detailed-report-august-2023.pdf>; Alex Leslie and Dan Murray, *An Analysis of the Operational Costs of Trucking: 2023 Update*, American Transportation Research Institute (June 2023), <https://truckingresearch.org/2023/06/an-analysis-of-the-operational-costs-of-trucking-2023-update/>.

² DAT Freight & Analytics, "DAT Trendlines: National Van Rates" (accessed on June 6, 2023), <https://www.dat.com/trendlines/van/national-rates>; Elizabeth Weise, "California's vast farms are soaked. There's nowhere to plant tomatoes, and that's just one problem," *USA Today* (April 1, 2023), <https://www.usatoday.com/story/news/2023/04/01/california-rain-and-farms-what-means-prices-food-availability/11550407002/>; U.S. Census Bureau, "Monthly New Residential Construction" (August 2023), <https://www.census.gov/construction/nrc/pdf/newresconst.pdf>; U.S. Census Bureau, "Monthly Retail Trade Inventories Report" (September 14, 2023), <https://www.census.gov/retail/mrtsinv/inventories.html>.

³ U.S. Bureau of Labor Statistics, "Industries at a Glance: Transportation and Warehousing" (accessed October 3, 2023), <https://www.bls.gov/iag/tgs/iag48-49.htm>; Federal Motor Carrier Safety Administration, "Registration Statistics" (accessed on October 3, 2023), U.S. Department of Transportation, <https://ai.fmcsa.dot.gov/registrationstatistics/CustomReports>.

⁴ U.S. Energy Information Administration, "Weekly Retail Gas and Diesel Prices" (accessed on June 13, 2023), https://www.eia.gov/dnav/pet/pet_pri_gnd_dcus_nus_w.htm; Mendora Lee, "Americans face more sticker shock at the pump as gas prices hit 10-month high. Here's why," *USA Today* (August 21, 2023), <https://www.usatoday.com/story/money/personalfinance/2023/08/18/future-gas-prices-predictions/70622402007/>.

⁵ Abhijith Ganapavaram, Priyamvada C and Juby Babu, "US trucking firm Yellow files for bankruptcy, blasts Teamsters," *Reuters* (August 7, 2023), <https://www.reuters.com/business/autos-transportation/us-trucking-firm-yellow-files-bankruptcy-after-loading-up-debt-2023-08-07/>.

⁶ J. Edward Moreno and Santul Nerkar, "Drivers and Dealers Could Soon Feel Impact of U.A.W. Strikes," *New York Times* (September 28, 2023), <https://www.nytimes.com/2023/09/28/business/economy/uaw-strike-dealerships-parts-suppliers.html>.

⁷ The Trucker, "Clean Freight Coalition warns feds of challenges before new emissions rules can be met" (July 27, 2023), <https://www.thetrucker.com/trucking-news/the-nation/clean-freight-coalition-warns-feds-of-challenges-before-new-emissions-rules-can-be-met>.

Yet 2023 was also a year in which important foundations were laid for a stronger trucking industry in the coming years. Significant funds were committed as part of the landmark 2021 Infrastructure Investment & Jobs Act.⁸ Furthermore, the truck parking crisis received newfound attention and grant funding from the U.S. Department of Transportation.⁹

Given the widespread economic challenges, it is imperative that supply chain stakeholders understand the interplay of the various issues confronting the trucking industry. For the past 19 years, the trucking industry has relied on the American Transportation Research Institute's (ATRI) Top Industry Issues analysis to prioritize the trucking industry's most critical issues as well as to identify preferred strategies for addressing each issue. Organizations such as the American Trucking Associations (ATA) and its Federation partners in the State Trucking Associations (STA) have leveraged ATRI's Top Industry Issues report to develop proactive industry-centric programs and strategies.

Methodology

ATRI's 2023 Top Industry Issues (TII) report utilizes a robust data collection initiative. A comprehensive list of issues and related counterstrategies were initially identified in collaboration with multiple freight stakeholder groups. Several 2023 issues also generated from the preponderance of write-in responses in the 2022 survey. Additionally, issues in the 2022 survey that received a limited number of votes (<100) were removed from the 2023 survey.

ATRI then conducted a large-scale survey distribution using its own contact database (32,000+ contacts), ATRI's regular Sirius/XM radio shows, major trucking industry trade press, truck driver groups and through the 50 State Trucking Associations. The 2023 survey launched August 28, 2023, and remained open for responses through September 29, 2023.

Following its standard methodology, the 2023 survey asked respondents to select their top three choices from a list of 26 critical issues, and subsequently rank their top three preferred strategies that correspond to each selected issue. Once again this year, write-in responses were allowed for both the top issues and the strategies.

ATRI then developed the Top 10 list using a formula that assigned weighted values to respondents' rankings of issues facing the industry. An issue ranked by a respondent as most important received three points, while an issue ranked second received two points and an issue ranked third received one point.

The sum total of points for each issue generated the prioritized list of top industry concerns. For example, the number one issue was the one receiving the highest number of points. Additionally, the analysis utilized an Industry Concern Index (ICI) to

⁸ American Road & Transportation Builders Association, "Tracking Infrastructure Investment & Jobs Act Highway and Bridge Resources" (accessed on October 3, 2023), <https://www.artba.org/economics/highway-dashboard-iiija/>.

⁹ U.S. Department of Transportation, "Truck Parking" (accessed on October 3, 2023), <https://www.transportation.gov/tags/truck-parking>.

illustrate the relative level of concern from one issue to the next. The top-ranked issue received an ICI of 100 against which all other issues were indexed. Therefore, an issue with an ICI of 50 has half the level of concern as the top issue.

Each respondent could rank three strategies, pre-identified by the freight stakeholder groups, that best address each of their top three issues. The percentage of respondents selecting each strategy as their number one choice generated the strategy ranking.

Over 4,000 industry stakeholders across North America weighed in with their opinions on the most important issues affecting the trucking industry and the broader supply chain.

The 2023 TII respondents represented motor carrier executives and personnel (47.8%), professional truck drivers (29%) and other industry stakeholders (23.2%), including industry suppliers, driver trainers, and law enforcement. In addition to providing an overall ranking, this report includes separate Top 10 lists for both commercial driver and motor carrier respondents. It also includes a breakout of the top three concerns by company drivers and owner-operators / independent contractors. For the first time this year, motor carrier enforcement personnel represented nearly five percent of respondents, so a separate analysis showing the top three law enforcement concerns is included.

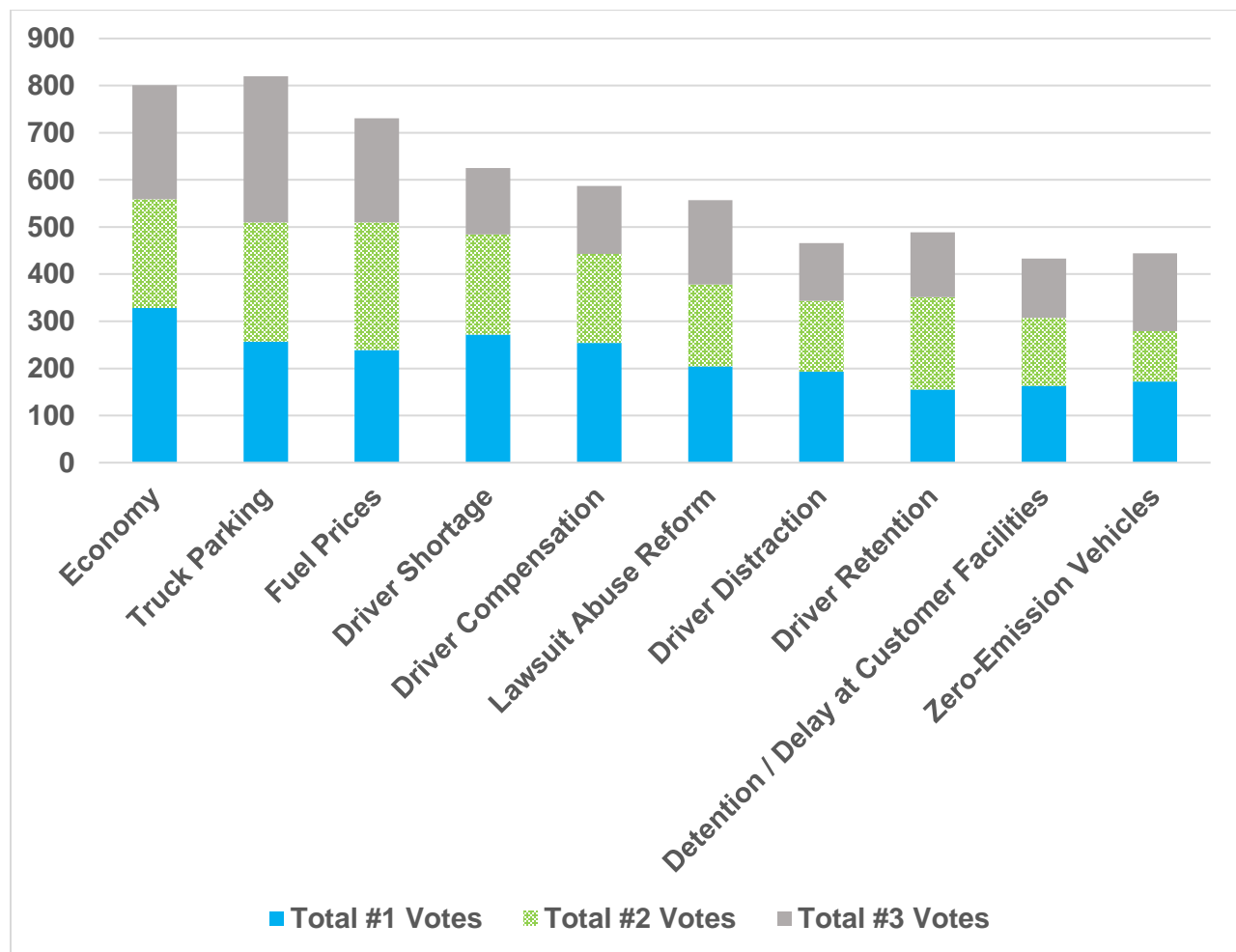
This report presents the findings of the 2023 annual survey and analysis and compares the findings of previous years' results (Table 6) – providing insight into both the ongoing and emerging priorities of the trucking industry.

The Top 10 Trucking Industry Issues

Across all respondents, the **Economy** was selected as the top industry concern in 2023. The lack of available **Truck Parking** rose one spot this year to the second-ranked issue, followed by **Fuel Prices**. The **Driver Shortage** dropped two spots this year to rank fourth overall and **Driver Compensation** continued as a top-five industry concern, ranking fifth overall in 2023 (Figure 1).

Driver Distraction returned to the top 10 list for the first time since 2018 as the seventh-ranked concern and **Zero-Emission Vehicles** entered the top 10 for the first time this year, ranking tenth overall.

Figure 1: Distribution of Industry Issue Prioritization Scores*



*The bars reflect total points from first, second and third place rankings. Issues that generate more second and third place rankings may appear to have a higher ranking than preceding issues.

1. Economy

Ranked 1 st 9.3%	Ranked 2 nd 6.7%	Ranked 3 rd 7.0%	Total Share 22.8%	Industry Concern Index 100
--------------------------------	--------------------------------	--------------------------------	----------------------	---

Concern over the state of the nation’s Economy rose four spots this year to be the top-ranked industry issue. From inflation, rising interest rates and diesel prices to reduced freight demand and declining rates, the Economy impacts motor carriers and drivers alike, showing up as a Top 10 concern for both (Table 3). The outlook for the remainder of the year remains uncertain given challenges like the impact on consumer spending from resumption of student loan payments and the temporary stop-gap funding of the federal government, set to expire in November.¹⁰

Proposed Strategies (in rank order):

a) *Identify and promote reforming / repealing ineffective and burdensome regulations that increase industry costs without providing benefits.* 48.6 percent of respondents believe that the best strategy for offsetting the negative impacts of the Economy is to reduce the industry’s regulatory burden. For example, the California Air Resources Board (CARB) Advanced Clean Truck rule requires medium- and heavy-duty vehicle manufacturers to sell zero-emission trucks (ZET) as an increasing portion of total sales within California from 2024 to 2035.¹¹ However, research has shown that extremely expensive battery-electric trucks only reduce lifecycle CO₂ emissions by 30 percent over diesel engines.¹² That same analysis found that increased vehicle weight from the batteries would mean fleets would need to purchase more vehicles to haul the same amount of freight – raising costs while reducing any environmental benefits.

b) *Quantify the impact of increasing trucking operational costs on the supply chain and nation’s economy.* Trucking is often considered a bellwether of the broader economy and as the industry’s costs increase, the impacts are felt throughout the supply chain and by consumers. Quantifying these impacts is the preferred strategy of 34.8 percent of respondents. The industry experienced record-high costs in 2022 – a 21.3 percent increase in operational costs over the previous year – and the expectation is that the cost to operate a truck will remain above \$2.00 per mile for the foreseeable future.¹³

¹⁰ Eugene Mulero, “Shutdown Averted: Congress Approves Nov. 17 Funding Fix,” *Transport Topics* (October 2, 2023), <https://www.ttnews.com/articles/congress-averts-shutdown>.

¹¹ Marie McNamara, “Understanding California’s Advanced Clean Truck Regulation,” Rocky Mountain Institute (June 27, 2023), <https://rmi.org/understanding-californias-advanced-clean-truck-regulation/#:~:text=What%20is%20ACT%3F,sales%20from%202024%20to%202035>.

¹² Jeffrey Short and Danielle Crownover, Understanding the CO₂ Impacts of Zero-Emission Trucks: A Comparative Life-Cycle Analysis of Battery Electric, Hydrogen Fuel Cell and Traditional Diesel Trucks, American Transportation Research Institute (May 2022), <https://truckingresearch.org/2022/05/understanding-the-co2-impacts-of-zero-emission-trucks/>.

¹³ Alex Leslie and Dan Murray, *An Analysis of the Operational Costs of Trucking: 2023 Update*, American Transportation Research Institute, American Transportation Research Institute (June 2023), <https://truckingresearch.org/2023/06/atris-newest-operational-costs-research-details-spikes-in-equipment-wage-and-total-costs-in-trucking/>.

c) *Advocate for reshoring and near-shoring of equipment and parts manufacturing to reduce reliance on international supply chains.* Nearly 15 percent of respondents believe that the best approach for mitigating economic concerns is to reduce the industry's reliance on sourcing equipment and parts manufacturing outside of North America.¹⁴ Industry support of the CHIPS Act of 2022 reflects this strategy to bring critical component manufacturing back to the U.S. through targeted federal investment.¹⁵

¹⁴ Cristina Commendatore, "Strained supply chains prompt industrial nearshoring trends," *FleetOwner Magazine* (January 24, 2023), <https://www.fleetowner.com/operations/article/21258620/strained-supply-chains-prompt-industrial-nearshoring-trends>.

¹⁵ American Trucking Associations, "ATA Hails Senate Passage of CHIPS Act" (July 27, 2022), <https://www.trucking.org/news-insights/ata-hails-senate-passage-chips-act>.

2. Truck Parking

Ranked 1 st 7.3%	Ranked 2 nd 7.3%	Ranked 3 rd 9.0%	Total Share 23.3%	Industry Concern Index 94.0
--------------------------------	--------------------------------	--------------------------------	----------------------	--

The lack of available Truck Parking first appeared as a Top 10 overall concern in 2012 and has been a top-five issue since 2015, reaching its highest ranking this year as the number two concern overall. However, this issue had been identified as an industry concern as far back as 1992 when the U.S. Senate directed the Federal Highway Administration (FHWA) to study the adequacy of truck parking at public rest areas and private truck stops.¹⁶ Now several decades later, the signing of the Infrastructure Investment and Jobs Act (IIJA) in 2021 has led to an increased focus on expanding truck parking capacity, including a recent announcement by the U.S. DOT of \$80 million in High Priority Grant Awards, including a 65 percent increase in funding for truck parking projects over the previous year.¹⁷

Proposed Strategies (in rank order):

a) *Advocate for a dedicated federal funding program to increase truck parking capacity at freight-critical locations.* Nearly 50 percent of respondents believe that dedicated federal funding for truck parking is the best solution for addressing this perennial industry challenge. The bipartisan Truck Parking Safety Improvement Act, introduced earlier this year, would provide \$755 million to expand parking capacity across the U.S. and was heralded by the industry as an important step to alleviating a parking shortage that is estimated at just one parking spot for every 11 truck drivers.¹⁸

b) *Encourage local and regional governments to reduce the regulatory burdens limiting the construction and expansion of truck parking facilities.* Despite a growing number of private-sector parking products and services, adding truck parking capacity – particularly in and around major metropolitan areas – continues to be hindered by local zoning regulations that limit or outright ban truck parking.¹⁹ But there are some positive advancements in providing truck parking in major metropolitan areas. The New York City Council recently passed a bill to create off-street parking for large trucks.²⁰ Encouraging the removal of regulatory burdens and potentially identifying new truck parking at the local and regional level is the preferred strategy of 34.6 percent of respondents.

¹⁶ Trucking Research Institute, Apogee Research, Inc., and Wilbur Smith Associates, *Commercial Driver Rest Area Requirements: No Room at the Inn* (May 1996).

¹⁷ U.S. Department of Transportation, "Biden-Harris Administration Announces More Than \$80 Million in Grants to Improve Highway Safety, Including Better Access to Truck Parking" (September 13, 2023), News Release, <https://www.transportation.gov/briefing-room/biden-harris-administration-announces-more-80-million-grants-improve-highway-safety>.

¹⁸ Eugene Mulero, "House Panel Advances Truck Parking Bill," *Transport Topics* (May 24, 2023), <https://www.ttnews.com/articles/house-panel-truck-parking>.

¹⁹ Alex Lockie, "How to fight for your right to park the truck," *Overdrive* (April 19, 2023), <https://www.overdriveonline.com/parking/article/15383241/fight-for-your-right-to-park-the-truck-how-to-be-an-advocate>.

²⁰ The Trucker, "New York City Council passes truck parking bill," (September 29, 2023), <https://www.thetrucker.com/trucking-news/the-nation/new-york-city-council-passes-truck-parking-bill>.

c) *Research the relationship between truck parking availability and highway safety.* Fatal crashes this year in Texas and Illinois have once again underscored the dangerous situation truck and car drivers face when truck drivers are forced to park on the side of the road when no available safe parking is available.²¹ Research to quantify this safety relationship is the preferred strategy of 14.9 percent of respondents.

²¹ Kris Van Cleave, "Lack of parking for semi-trucks can have fatal consequences," CBS (September 25, 2023), <https://www.cbsnews.com/news/truck-parking-shortage-fatal-accidents/#:~:text=The%20National%20Transportation%20Safety%20Board,ramps%20%E2%80%94%20sometimes%20with%20fatal%20consequences.>

3. Fuel Prices

Ranked 1 st 6.8%	Ranked 2 nd 7.9%	Ranked 3 rd 6.4%	Total Share 20.8%	Industry Concern Index 87.7
--------------------------------	--------------------------------	--------------------------------	----------------------	--

Last year's number one concern, Fuel Prices, moved down two spots this year to a third-place overall ranking. ATRI's 2023 *Operational Costs of Trucking* found year-over-year increases in the fuel cost per mile of 53.7 percent, with fuel representing 28 percent of the total operating costs – the highest since 2014.²² According to the Energy Information Administration (EIA), the average monthly diesel price per gallon had been dropping through the first half of this year over 2022 highs due to the slowing economy, but starting in July 2023, had begun increasing again due to OPEC production cuts. The September 2023 average price per gallon was \$4.563.²³ High diesel prices are especially challenging for owner-operators, who for the third year in a row have ranked fuel prices as their top concern (Table 4).

Proposed Strategies (in rank order):

a) *Advocate for federal actions that help stabilize the supply of fuel and minimize price increases.* A majority of respondents (68.0%) believe the best approach for addressing high fuel prices is to stabilize the nation's fuel supply through federal action, whether that be expanding refining capacity, increasing domestic drilling, or continuing to tap the Strategic Petroleum Reserve (SPR). The latter is not without controversy and last year's draw on the SPR took it to its lowest level since the 1980s.²⁴ However, more recently, a limited number of domestic drilling projects have been approved.²⁵

b) *Research potential factors that may be affecting fuel availability and pricing volatility.* Geopolitical events including the war in Ukraine, OPEC oil production cuts and growing tension with China and Russia continued to impact diesel prices.²⁶ Additional volatility could be introduced this winter if the weather is harsh and demand for heating oil puts additional pressures on supply. As such, 23.5 percent of respondents believe that more research is needed to fully understand the interplay of factors affecting the nation's fuel supply.

c) *Quantify the impact of alternative and renewable fuel sources on motor carrier operational costs.* Fewer than 10 percent of respondents (6.3%) believe the best approach for addressing high fuel costs is to quantify the impact of other fuel sources,

²² Alex Leslie and Dan Murray, *An Analysis of the Operational Costs of Trucking: 2023 Update*, American Transportation Research Institute (June 2023), <https://truckingresearch.org/2023/06/atris-newest-operational-costs-research-details-spikes-in-equipment-wage-and-total-costs-in-trucking/>.

²³ U.S. Energy Information Association, "Weekly Retail Gas and Diesel Prices" (accessed on October 4, 2023), https://www.eia.gov/dnav/pet/pet_pri_gnd_dcus_nus_w.htm.

²⁴ Matthew Daly, "Biden administration delays plans to restock nation's emergency oil reserve," *PBS* (August 2, 2023), <https://www.pbs.org/newshour/politics/biden-administration-delays-plans-to-restock-nations-emergency-oil-reserve>.

²⁵ Ella Nilsen, "Biden administration approves controversial Willow oil project in Alaska, which has galvanized online activism," *CNN* (March 14, 2023), <https://www.cnn.com/2023/03/13/politics/willow-project-alaska-oil-biden-approval-climate/index.html>.

²⁶ Santul Nerkar and Clifford Krauss, "Diesel Prices Could Keep Inflation High," *The New York Times* (October 5, 2023), <https://www.nytimes.com/2023/10/05/business/energy-environment/diesel-prices-inflation.html>.

including alternative and renewable fuels, on the industry’s overall costs. Part of the challenge in doing so is the limited penetration of these alternate fuel sources in the combination vehicle market. ATRI’s latest *Operational Costs of Trucking* found that just 8.2 percent of respondent fleets had one or more Class 8 truck-tractor powered by an alternative fuel source, with compressed natural gas (CNG) at the top of the list (Table 1).²⁷

Table 1: Use of Alternative Fuel Vehicles

Alternative Fuel Type	Percent of ATRI Ops Costs Respondents Using Alternative Fuels
CNG	6.2%
Battery Electric	5.1%
LNG	2.1%
LPG	0.5%
Hydrogen Fuel Cell	0%

²⁷ Alex Leslie and Dan Murray, *An Analysis of the Operational Costs of Trucking: 2023 Update*, American Transportation Research Institute (June 2023), <https://truckingresearch.org/2023/06/atris-newest-operational-costs-research-details-spikes-in-equipment-wage-and-total-costs-in-trucking/>.

4. Driver Shortage

Ranked 1 st 7.7%	Ranked 2 nd 6.2%	Ranked 3 rd 4.1%	Total Share 17.8%	Industry Concern Index 81.8
--------------------------------	--------------------------------	--------------------------------	----------------------	--

The Driver Shortage dropped in rank for the second year, falling to number four overall. The estimates for the shortage this year were down from previous years, with an estimated 64,000 drivers needed.²⁸ When freight demand is soft as it was in late 2022 and into this year, fleets will slow driver hiring and, in some cases, lay drivers off. The last time that the Driver Shortage experienced a similar drop in ranking in this survey was during the Great Recession (2008-2009), reaching its lowest rank of number six overall in 2009.²⁹

Proposed Strategies (in rank order):

a) *Research the primary factors behind drivers leaving trucking careers.* Research to understand why drivers leave trucking careers is the preferred strategy of 37.9 percent of respondents. While the industry tracks annualized turnover rates, what is less clear is what portion of those drivers move to other carriers and what portion leave the industry altogether. ATRI recently commenced research that will examine why women drivers leave the industry as part of a broader study to understand the challenges faced by women drivers and how to overcome those challenges.³⁰

b) *Advocate for expanding interstate CDL eligibility to 18-20-year-old drivers.* The Drive Safe Act, signed into law as part of the IIJA in November 2021, included a new national pilot test allowing up to 3,000 18- to 20-year-olds to operate trucks in interstate freight commerce. However, the FMCSA Safe Driver Apprenticeship Program (SDAP) has struggled to generate participation, in part due to stringent requirements including having a registered apprenticeship program and deploying numerous safety technologies.³¹ Despite the SDAP’s uncertain future, 32.0 percent of respondents believe that the industry should continue to advocate for expanded CDL eligibility for younger drivers.

c) *Support an industry-funded outreach program to improve the trucking industry’s image.* Over 28 percent of respondents believe that the best strategy for recruiting more drivers is to improve the industry’s image. Public polling commissioned by Trucking Moves America Forward did find that the industry’s image had improved in

²⁸ Josh Fisher, “As recession concerns rise, driver shortage figures stall,” *FleetOwner Magazine* (October 26, 2022), <https://www.fleetowner.com/operations/article/21253421/as-recession-concerns-rise-driver-shortage-figures-stall>.

²⁹ ATRI, *Critical Issues in the Trucking Industry – 2009* (October 2009), <https://truckingresearch.org/2009/10/critical-issues-in-the-trucking-industry-2009/>.

³⁰ ATRI, “ATRI Releases New Research Priorities for 2023” (May 8, 2023), <https://truckingresearch.org/2023/05/atri-releases-new-research-priorities-for-2023/>

³¹ Alex Lockie, “Are under-21 interstate drivers worth the hassle?,” *Overdrive* (February 9, 2023), <https://www.overdriveonline.com/regulations/article/15306517/fmcsas-under21-driver-pilot-program-worth-the-hassle>.

2022 over 2019, with 87 percent of respondents saying they had a favorable impression of the trucking industry, up from 67 percent in 2019.³²

³² Overdrive, "How does the public view truckers in 2022?," (November 10, 2022), <https://www.overdriveonline.com/life/article/15302954/how-does-the-public-view-truckers-in-2022>.

5. Driver Compensation

Ranked 1 st 7.2%	Ranked 2 nd 5.5%	Ranked 3 rd 4.2%	Total Share 16.7%	Industry Concern Index 76.1
--------------------------------	--------------------------------	--------------------------------	----------------------	--

Driver Compensation dropped one position this year to the number five concern overall. Data from ATRI’s 2023 *Operational Costs of Trucking* research showed that driver wages increased 15.5 percent over the previous year, with the combined driver wage and benefit figure (\$0.907 per mile) achieving a record-high since the *Operational Costs* research first launched in 2008.³³ However, the current Ops Costs report uses 2022 data and it is very possible that the softer freight demand this year negatively impacted wages, thus pushing Compensation back to the top of the drivers’ list of concerns (Table 3).

Proposed Strategies (in rank order):

a) *Quantify the economic impact of compensating drivers for all hours worked, including detention time and congestion delays.* Compensating drivers for all hours worked has been a perennial write-in strategy by driver respondents for the past five years, and 46.0 percent of respondents believe quantifying the economic impact of doing so is the preferred approach to Driver Compensation. ATRI’s 2019 detention research examined longitudinal data from 2014 and 2018 and found that drivers reported a 27.4 percent increase in delays of six or more hours.³⁴ Separate ATRI research found that the annualized 1.2 billion hours of lost productivity due to congestion were the equivalent of 425,000 truck drivers sitting idle for a year.³⁵ Given these significant impacts on driver productivity, it is understandable that drivers in particular would advocate for being compensated for all on-duty hours.

b) *Analyze truck driver compensation models and their relationship to driver satisfaction and productivity.* Beyond raising pay, fleets are exploring other models to compensate drivers. ATRI research identified a variety of pay models beyond traditional pay-by-mile including pay-per-load, percentage of bill and guaranteed salaries.³⁶ Better understanding of the relationship between these varied pay models and driver satisfaction is the preferred strategy of 32.0 percent of respondents.

c) *Research and prioritize the effectiveness of carrier programs that financially incentivize drivers for retention, safety performance, and fuel economy.* ATRI’s

³³ Alex Leslie and Dan Murray, *An Analysis of the Operational Costs of Trucking: 2023 Update*, American Transportation Research Institute (June 2023), <https://truckingresearch.org/2023/06/atris-newest-operational-costs-research-details-spikes-in-equipment-wage-and-total-costs-in-trucking/>.

³⁴ Erin Speltz and Dan Murray, *Driver Detention Impacts on Safety and Productivity*, American Transportation Research Institute (September 2023), <https://truckingresearch.org/2019/09/driver-detention-impacts-on-safety-and-productivity/>.

³⁵ Alan Hooper, *Cost of Congestion to the Trucking Industry: 2018 Update*, American Transportation Research Institute (October 2018), <https://truckingresearch.org/2018/10/cost-of-congestion-to-the-trucking-industry-2018-update/>.

³⁶ Rebecca M. Brewster, *Owner-Operators / Independent Contractors in The Supply Chain*, American Transportation Research Institute (December 2021), <https://truckingresearch.org/2021/12/owner-operators-independent-contractors-in-the-supply-chain/>.

Operational Costs of Trucking found that fleets are offering average annual bonuses of \$1,200+ to drivers for starting, retention, referral, and safety performance bonuses.³⁷ One fleet found that rewarding drivers for fuel economy saved the company over \$2 million annually in fuel costs.³⁸ Studying the efficacy of bonus programs for rewarding drivers is the recommended strategy of 20.6 percent of respondents.

³⁷ Alex Leslie and Dan Murray, *An Analysis of the Operational Costs of Trucking: 2023 Update*, American Transportation Research Institute (June 2023), <https://truckingresearch.org/2023/06/atris-newest-operational-costs-research-details-spikes-in-equipment-wage-and-total-costs-in-trucking/>.

³⁸ Cristina Commendatore, "Performance-based driver incentives help fleet save \$2M in fuel costs", *FleetOwner Magazine* (November 16, 2022), <https://www.fleetowner.com/emissions-efficiency/fuel-economy/article/21254828/performancebased-driver-incentives-help-fleet-save-2m-in-fuel-cost>.

6. Lawsuit Abuse Reform

Ranked 1 st 5.8%	Ranked 2 nd 5.0%	Ranked 3 rd 5.2%	Total Share 15.8%	Industry Concern Index 67.5
--------------------------------	--------------------------------	--------------------------------	----------------------	--

Lawsuit Abuse Reform, also described as tort reform, is once again climbing in rank as a top industry concern, this year ranking sixth overall and third among motor carriers (Table 3). Lawsuit Abuse Reform is one of three issues, along with Fuel Costs and Driver Shortage, that were ranked as Top 10 concerns in the inaugural Top Industry Issues Survey in 2005 and remain today. The need for Lawsuit Abuse Reform is closely tied to another top industry concern, Insurance Cost / Availability (#6 on Motor Carrier list, Table 3), as the frequency and size of verdicts and settlements against the industry have grown in recent years.³⁹ This has led to increased insurance premiums for all carriers, regardless of safety performance and crash involvement.

Proposed Strategies (in rank order):

a) *Promote state-level reform to cap damages paid to plaintiffs in truck-involved crashes.* Seeking reform at the state-level to put limits on the amounts that can be awarded to plaintiffs for non-economic damages is the preferred strategy of the majority (64.8%) of respondents. Iowa recently passed such legislation, limiting non-economic damages – sometimes referred to as punitive damages – to \$5 million per plaintiff.⁴⁰

b) *Advocate for elimination of “phantom” damages.* Phantom damages are the delta between medical costs that a defendant is billed for versus the actual medical costs paid. These inflated amounts can create a non-compensatory windfall for the plaintiff and plaintiff’s attorney. Recent legislative wins in Florida and Montana specifically addressed phantom damages and other states are looking to pursue similar legislation.⁴¹ One in five respondents believe that elimination of phantom damages is the top strategy for Lawsuit Abuse Reform.

c) *Quantify the impact of third-party litigation financing on trial outcomes.* The use of third-party litigation financing is growing in the U.S., and it is often used to provide capital for plaintiffs’ cases to cover things like focus groups, expert witnesses and other litigation tools. The financing is typically provided on a contingency basis, with repayment generating from a judgement or out-of-court settlement favoring the plaintiff. As described in ATRI’s nuclear verdict research, the growth in third-party litigation financing is leading to increased litigation and frivolous lawsuits being pursued in hopes

³⁹ Cristina Commendatore, "Lawsuit abuse, outrageous settlements cannot become trucking's Achilles' heel," *FleetOwner Magazine* (December 5, 2022), <https://www.fleetowner.com/perspectives/from-my-lane/blog/21255581/lawsuit-abuse-outrageous-settlements-cannot-become-truckings-achilles-heel>.

⁴⁰ Stephen Gruber-Miller, "\$5M cap on pain, suffering in truck driving lawsuits close to becoming Iowa law," *Des Moines Register* (April 17, 2023), <https://www.desmoinesregister.com/story/news/politics/2023/04/17/iowa-senate-votes-to-limit-pain-and-suffering-in-truck-driving-lawsuits/70121982007/>.

⁴¹ Eleanor Lamb, "Phantom Damages Addressed in New Montana Law," *Transport Topics* (May 10, 2021), <https://www.ttnews.com/articles/phantom-damages-addressed-new-montana-law>; American Trucking Associations, "TA Applauds Lawsuit Abuse Reform in Florida" (March 24, 2023), Press Release, <https://www.trucking.org/news-insights/ata-applauds-lawsuit-abuse-reform-florida>.

of investor payouts.⁴² The lack of transparency surrounding third-party litigation funding prompted a 2022 General Accounting Office (GAO) review of the third-party litigation funding marketplace.⁴³ Quantifying the impact of third-party litigation on trial outcomes is the preferred strategy of 13.8 percent of respondents.

⁴² Dan Murray, Nathan Williams, and Erin Speltz, *Understanding the Impact of Nuclear Verdicts on the Trucking Industry*, American Transportation Research Institute (June 2020), <https://truckingresearch.org/2020/06/understanding-the-impact-of-nuclear-verdicts-on-the-trucking-industry/>.

⁴³ U.S. Government Accountability Office, *GAO Highlights: Third-Party Litigation Financing* (December, 2022), <https://www.gao.gov/assets/gao-23-105210-highlights.pdf>.

7. Driver Distraction

Ranked 1 st 5.5%	Ranked 2 nd 4.4%	Ranked 3 rd 3.6%	Total Share 13.2%	Industry Concern Index 59.4
--------------------------------	--------------------------------	--------------------------------	----------------------	--

Driver Distraction first appeared in the Top 10 list in 2014, ranking 10th overall. It rose to a peak of 7th overall concern in 2018 and then did not make the Top 10 list again until this year. The National Highway Traffic Safety Administration (NHTSA) reports that 3,522 people were killed in traffic crashes in 2021 that were found to be distraction-affected crashes, and 410 of those individuals died in crashes involving at least one driver who was engaged in cell-phone-related activities.⁴⁴ Among law enforcement respondents in this year’s survey, Driver Distraction was the top concern (Table 5).

Proposed Strategies (in rank order):

a) *Encourage harsher penalties and more aggressive enforcement of distracted driving laws for all road users.* The top strategy among respondents (37.8%) for reducing distracted driving is to utilize more aggressive enforcement and harsher penalties to deter distracted driving. While the penalties for truck drivers using a handheld device while driving are significant, in some states, car drivers can get by with a \$25 ticket for using a cellphone while driving.⁴⁵

b) *Advocate for national standards for distracted driving laws for all motorists.* The trucking industry has one national standard that all CDL drivers are held to for use of a handheld device while driving.⁴⁶ However, that is not the case for car drivers who are subject to different laws and associated penalties in all 50 states. Having one national standard for all road users is the preferred strategy of 30.9 percent of respondents.

c) *Quantify the role of car driver distraction in car-truck crashes.* The preferred strategy of 29.2 percent of respondents to address distracted driving is to better understand the role of car driver distraction in car-truck crashes. Truck drivers report that they regularly see car drivers engaging in unsafe behaviors, particularly driving distracted.⁴⁷ The consequences of that distracted driving can be severe when it results in a crash. NHTSA’s proposed rule for automatic emergency braking (AEB) for cars and light trucks

⁴⁴ National Highway Traffic Safety Administration, *Traffic Safety Facts Research Note: Distracted Driving in 2021* (May 2023), U.S. Department of Transportation, <https://crashstats.nhtsa.dot.gov/Api/Public/ViewPublication/813443>.

⁴⁵ Celeste Tholen, "The Dangers and Costs of Distracted Driving in Your State," SafeWise (October 7, 2021), <https://www.safewise.com/blog/distracted-driving-by-state/>.

⁴⁶ Federal Motor Carrier Safety Administration, "Mobile Phone Restrictions Fact Sheet" (updated on December 30, 2013), U.S. Department of Transportation, <https://www.fmcsa.dot.gov/driver-safety/distracted-driving/mobile-phone-restrictions-fact-sheet#:~:text=Fines%20and%20Penalties%20%2D%20Using%20a,held%20communications%20device%20while%20driving>.

⁴⁷ John Fisher, "Distracted car drivers are a growing risk to safe truck drivers," *FleetOwner Magazine* (November 8, 2022), <https://www.fleetowner.com/safety/article/21254283/distracted-car-drivers-are-a-growing-risk-to-safe-truck-drivers>.

would provide another safety layer to potentially reduce crashes caused by distracted car drivers.⁴⁸

⁴⁸ National Highway Traffic Safety Administration, "NHTSA Proposes Automatic Emergency Braking Requirements for New Vehicles" (May 31, 2023), U.S. Department of Transportation, <https://www.nhtsa.gov/press-releases/automatic-emergency-braking-proposed-rule>.

8. Driver Retention

Ranked 1 st 4.4%	Ranked 2 nd 5.7%	Ranked 3 rd 4.0%	Total Share 13.9%	Industry Concern Index 58.9
--------------------------------	--------------------------------	--------------------------------	----------------------	--

Likely the result of the softer freight market starting in latter 2022, Driver Retention dropped another spot this year to the number 8th overall concern. Even among motor carrier respondents, Driver Retention dropped two spots this year to their number four concern (Table 3). While Driver Shortage, Driver Compensation and Driver Retention are all related workforce issues, the strategies to address each are distinct. One strategy to encourage retention is the use of compensation in the form of retention bonuses. ATRI's 2023 *Operational Costs of Trucking* found that the average retention bonus was \$1,272, up nearly 90 percent over the past four years.⁴⁹

Proposed Strategies (in rank order):

a) *Research and promote the retention strategies of carriers that continuously experience low driver turnover.* A plurality of respondents (47.9%) believe that emulating the retention strategies of fleets with low driver turnover is the best approach to retaining drivers. The smallest fleets in ATRI's *Operational Costs of Trucking* – those with fewer than 26 trucks – had the lowest turnover rates (<30%), indicating that while their pay may not match that of larger fleets, they are employing workforce strategies that better retain their drivers.⁵⁰

b) *Evaluate the impact of truck driver benefits, including health insurance and retirement benefits, on driver retention.* ATRI's 2023 *Operational Costs of Trucking* analysis found that 80 percent or more of participating motor carriers provided a suite of benefits to their drivers including health insurance (97%), paid vacation (91%), 401k (85%) and dental insurance (81%). In addition, the percentage of fleets providing health, paid vacation and 401k increased in this year's analysis, corroborating that fleets believe this is an important component in retaining drivers. Understanding the impact of these benefit offerings on retention was the preferred strategy of 32.3 percent of respondents.

c) *Conduct market research on truck driver experiences and perspectives mapped to truck driver tenure data.* Understanding not only how drivers feel about their job but also understanding the differences in those perspectives between new entrant and veteran drivers is the preferred strategy of 18 percent of respondents. Driver surveys, including this annual TII survey, routinely point to the factors that drivers consider important in their daily work, and can offer a roadmap of what carriers should be focused on to improve driver retention.⁵¹

⁴⁹ Alex Leslie and Dan Murray, *An Analysis of the Operational Costs of Trucking: 2023 Update*, American Transportation Research Institute (June 2023), <https://truckingresearch.org/2023/06/atris-newest-operational-costs-research-details-spikes-in-equipment-wage-and-total-costs-in-trucking/>.

⁵⁰ Ibid.

⁵¹ The Trucker, "Pay, equipment quality remain top driver concerns, according to new recruiting, retention report" (April 28, 2023), <https://www.thetrucker.com/trucking-news/business/pay-equipment-quality-remain-top-driver-concerns-according-to-new-recruiting-retention-report>.

9. Detention / Delay at Customer Facilities

Ranked 1 st 4.6%	Ranked 2 nd 4.2%	Ranked 3 rd 3.6%	Total Share 12.3%	Industry Concern Index 53.5
--------------------------------	--------------------------------	--------------------------------	----------------------	--

Detention / Delay at Customer Facilities experienced the largest drop in ranking among Top 10 issues this year, down to number nine overall from number six in the 2022 survey. Like several other issues in this year's Top 10, this drop in ranking may be a function of softened freight demand which can reduce the time spent loading and unloading freight. However, this temporary lessening of detention does not mitigate the fact that this is a long-standing, perennial challenge for the supply chain. In recognition of the need to identify solutions, ATRI's Research Advisory Committee prioritized detention research for 2023.⁵²

Proposed Strategies (in rank order):

a) *Advocate for guaranteed detention pay after a driver is detained for one hour or more at customer facilities.* The majority of respondents (65.4%) believe that the best solution for detention is to guarantee driver pay when waiting beyond one hour. ATRI's 2019 detention research found that drivers were often detained six hours or more when servicing customers, and that excessive delays were on the rise, resulting in significant impacts to drivers' compensation when unproductive time goes unpaid.⁵³

b) *Support legislation to require customer facilities to provide restroom access to drivers.* Washington State was the first to introduce legislation to provide restroom access for drivers and nearly one in five respondents (17.3%) believe this is a top priority strategy for addressing detention.⁵⁴ Earlier this year, federal legislation was introduced to guarantee restroom access for truck drivers, and it was strongly supported by industry groups.⁵⁵

c) *Educate customers on the need to provide safe, onsite truck parking when drivers are detained beyond two hours.* Drivers being forced to seek out offsite truck parking when being detained at a customer's facility can put drivers in unsafe conditions that can result in harm to the driver.⁵⁶ Educating customers on why they need to provide safe parking for drivers on their property is the preferred strategy of 15.9 percent of respondents.

⁵² ATRI, "ATRI Releases New Research Priorities for 2023" (May 8, 2023), <https://truckingresearch.org/2023/05/atri-releases-new-research-priorities-for-2023/>.

⁵³ Erin Speltz and Dan Murray, *Driver Detention Impacts on Safety and Productivity*, American Transportation Research Institute (September 2023), <https://truckingresearch.org/2019/09/driver-detention-impacts-on-safety-and-productivity/>.

⁵⁴ Drew Mikkelsen, "Was Lyndon Finney, "Detained: Industry still awaiting a solution on long-standing driver detention issue," *The Trucker* (June 8, 2022), <https://www.thetrucker.com/trucking-news/truckload-authority/trends-in-trucking/detained-industry-still-awaiting-a-solution-on-long-standing-driver-detention-issue>. hington law guaranteeing truck drivers access to bathrooms could become national model," *King5 News Seattle* (August 14, 2023), <https://bit.ly/46sKIPr>.

⁵⁵ Eugene Mulero, "House Lawmakers Introduce Bathroom Access Bill," *Transport Topics* (June 13, 2023), <https://www.ttnews.com/articles/bathroom-access-truckers>.

⁵⁶ Lyndon Finney, "Detained: Industry still awaiting a solution on long-standing driver detention issue," *The Trucker* (June 8, 2022), <https://www.thetrucker.com/trucking-news/truckload-authority/trends-in-trucking/detained-industry-still-awaiting-a-solution-on-long-standing-driver-detention-issue>.

10. Zero-Emission Vehicles

Ranked 1 st 4.9%	Ranked 2 nd 3.1%	Ranked 3 rd 4.8%	Total Share 12.6%	Industry Concern Index 53.0
--------------------------------	--------------------------------	--------------------------------	----------------------	--

Zero-Emission Vehicles (ZEV) is on the Top 10 list for the first time this year, and its emergence as a top industry concern is not a surprise given the new focus of state and federal agencies on very aggressive timelines for transitioning the nation’s vehicle fleet away from internal combustion engines.⁵⁷ The impacts for the trucking industry are particularly challenging given the extremely high costs of ZEV and the lack of charging infrastructure nationwide.⁵⁸

Proposed Strategies (in rank order):

a) *Quantify the charging infrastructure requirements and subsequent supply chain cost increases of zero-emission truck mandates.* ATRI research documented that full electrification of the U.S. vehicle fleet would require over 40 percent of the country’s existing electricity generation and in some states, like California, that percentage would near 60 percent.⁵⁹ That same research found that equipping the nation’s truck parking spaces with chargers would require an initial deployment cost topping \$35 billion. Understanding these impacts and their associated cost increases across the supply chain is the preferred strategy of 53.8 percent of respondents.

b) *Assess the potential of a Federal Excise Tax (FET) repeal for encouraging fleet investment in newer, more energy-efficient equipment.* 22.7 percent of respondents believe that the best approach for addressing Zero-Emission Vehicles is to understand how a repeal of the FET would impact the industry’s environmental footprint as fleets invested in newer equipment. At 12 percent, the 105-year-old FET is among the highest percentage of any excise tax currently levied on a product.⁶⁰

c) *Research the impacts of battery-electric vehicles on transportation infrastructure, crash response and first responder safety.* Battery electric vehicles are heavier than their internal combustion engine counterparts and as such, will have different impacts on the nation’s highways and in crash severity.⁶¹ Additionally, the challenges of extinguishing lithium-ion battery fires has generated a significant amount of concern

⁵⁷ Alan Ohnsman, "California To Only Allow Zero-Emission Trucks In The State By 2045," *Forbes* (April 28, 2023), <https://www.forbes.com/sites/alanohnsman/2023/04/28/california-to-only-allow-zero-emission-trucks-in-the-state-by-2045/?sh=794a2b6a5bd9>; U.S. Environmental Protection Agency, "Biden-Harris Administration Proposes Strongest-Ever Pollution Standards for Cars and Trucks to Accelerate Transition to a Clean-Transportation Future" (April 12, 2023), News Release, <https://www.epa.gov/newsreleases/biden-harris-administration-proposes-strongest-ever-pollution-standards-cars-and>.

⁵⁸ Eugene Mulero, "ATA Exec Andrew Boyle Presses EV Infrastructure in Senate," *Transport Topics* (April 18, 2023), <https://www.ttnews.com/articles/ata-andrew-boyle-excise-tax>.

⁵⁹ Jeffery Short, Alexandra Shirk, and Alexa Pupillo, *Charging Infrastructure Challenges for the U.S. Electric Vehicle Fleet*, American Transportation Research Institute (December 2022), <https://truckingresearch.org/2022/12/new-atri-research-evaluates-charging-infrastructure-challenges-for-the-u-s-electric-vehicle-fleet/>.

⁶⁰ American Trucking Associations, "ATA Voices Support for Bipartisan, Bicameral Effort to Repeal Truck Excise Tax" (March 9, 2023), <https://www.trucking.org/news-insights/ata-voices-support-bipartisan-bicameral-effort-repeal-truck-excise-tax>.

⁶¹ Johnathan M. Gitlin, "EVs are getting too heavy and too powerful, safety chief says," *Ars Technica* (January 12, 2023), <https://arstechnica.com/cars/2023/01/top-safety-advisor-raises-alarm-about-ever-heavier-evs/>.

among first responders.⁶² Research to better understand all these impacts is the preferred strategy of 20.5 percent of respondents.

⁶² Safety + Health Magazine, "Firefighter safety stand-down to focus on lithium-ion batteries" (May 8, 2023), <https://www.safetyandhealthmagazine.com/articles/23934-firefighter-safety-stand-down-to-focus-on-lithium-ion-batteries>.

Emerging Issues

As part of its analysis of critical industry issues, ATRI also tracks the emerging topics that generate significant industry interest but fall just outside of the Top 10 concerns (Table 2). This analysis can provide insight on issues that may emerge in the future as a top industry issue.

Table 2: Issues 11 – 13

Rank	Issue	ICI
11	Driver Training Standards	51.1
12	Insurance Cost / Availability	49.8
13	Diesel Technician Shortage	44.5

This is the second year that Driver Training Standards has been identified as an emerging issue and its ranking among truck drivers is up three spots to number six this year (Table 3). Even with the Entry-Level Driver Training (ELDT) rule implemented last year, a review of the write-in comments from drivers reveals that drivers feel strongly that new entrants are not being adequately trained. The comments point to the need to expand the time spent training and increase the minimum number of years of experience for trainers, currently at two years in the ELDT. A recent exemption request submitted to FMCSA to lower the two-year experience requirement garnered similar responses to the federal docket.⁶³ Driver Training Standards was also identified by law enforcement personnel as one of their top three concerns (Table 5).

Insurance Cost / Availability is once again on the list of emerging issues after dropping out of the Top 10 last year. However, the relationship between the need for Lawsuit Abuse Reform and its impact on Insurance Cost / Availability keeps both issues on the motor carrier Top 10 list (Table 3). ATRI research documented a 40 percent increase in the liability insurance premium cost per mile over the past decade, although the growth in premiums has moderated somewhat more recently, with just a five percent increase from 2018 to 2022.⁶⁴ Insurance experts also indicate that rates are beginning to level off, likely contributing to Insurance Cost / Availability staying out of the overall Top 10 once again this year.⁶⁵

The Diesel Technician Shortage first appeared as an Emerging Issue in the Top Industry Issues Survey in 2017 and later made it to the Top 10 in 2021, ranking tenth overall. Some in the industry believe that the need for diesel technicians is as significant as the need for truck drivers, and the U.S. Bureau of Labor Statistics estimates that the industry will add over 28,000 new diesel technician positions per year

⁶³ Mark Schremmer, "Exemption for driver training instructors? Truckers say no," *Land Line Media* (August 22, 2023), <https://landline.media/exemption-for-driver-training-instructors-truckers-say-no/>.

⁶⁴ Alex Leslie and Dan Murray, *An Analysis of the Operational Costs of Trucking: 2023 Update*, American Transportation Research Institute (June 2023), <https://truckingresearch.org/2023/06/atris-newest-operational-costs-research-details-spikes-in-equipment-wage-and-total-costs-in-trucking/>.

⁶⁵ Mindy Long, "Have Trucking Insurance Premiums Peaked?," *Transport Topics* (August 11, 2023), <https://www.ttnews.com/articles/insurance-trucking-premiums>.

through 2030.⁶⁶ ATRI's Research Advisory Committee identified the Diesel Technician Shortage as a top research priority for 2023.⁶⁷

⁶⁶ John Hitch, "Mike Rowe on diesel technician shortage: 'The math ain't good'," *FleetOwner Magazine* (May 26, 2022), <https://www.fleetowner.com/operations/article/21242644/mike-rowe-on-diesel-technician-shortage-the-math-aint-good>.

⁶⁷ ATRI, "ATRI Releases New Research Priorities for 2023" (May 8, 2023), <https://truckingresearch.org/2023/05/atri-releases-new-research-priorities-for-2023/>.

Commercial Driver versus Motor Carrier Issue Rankings

The previous section of the Top Industry Issues report details the results of the overall industry survey analysis for industry stakeholders including employee drivers and owner-operators, motor carrier executives, and other trucking industry stakeholders. However, each stakeholder group has different levels of involvement in, and unique perspectives on, how these topics impact them. As a result of these varied experiences, the selection and ranking of issues will differ across these groups. To provide insight into the differing perspectives in the ATRI survey sample, a separate analysis is provided to juxtapose how commercial drivers and motor carriers rank the issues (Table 3).

The rankings of industry issues by truck drivers and motor carrier executives are invariably influenced by their day-to-day experiences and encounters. A divergence of opinions between these two groups can provide deeper insight into the consequences of an industry issue.

Table 3: 2023 Commercial Driver and Motor Carrier Issues

Rank	Commercial Drivers	Motor Carriers
1	Driver Compensation	Economy
2	Truck Parking	Driver Shortage
3	Fuel Prices	Lawsuit Abuse Reform
4	Speed Limiters	Driver Retention
5	Detention / Delay at Customer Facilities	Fuel Prices
6	Driver Training Standards	Insurance Cost / Availability
7	Economy	Zero-Emission Vehicles
8	Broker Issues	Truck Parking
9	ELD Mandate	Diesel Technician Shortage
10	Autonomous Trucks	Driver Distraction

Broker Issues was added to the Top Industry Issues Survey this year based on the large number of truck driver write-in responses in recent years' surveys and the federal government's interest in double-brokering issues. Earlier this year, FMCSA indicated

that it would consider a 2020 rulemaking request from the Owner-Operator Independent Driver Association (OOIDA) on broker transparency.⁶⁸

Even within the truck driver population, there is a divergence of priority issues between company drivers and owner-operators (Table 4).

Table 4: Company Driver and Owner-Operator / Independent Contractor Issues

Rank	Company Drivers	Owner-Operators / Independent Contractors
1	Driver Compensation	Fuel Prices
2	Truck Parking	Speed Limiters
3	Speed Limiters	Truck Parking

Motor Carrier Enforcement Personnel

This year’s survey included expanded outreach through the Commercial Vehicle Safety Alliance (CVSA), which yielded an increased number of motor carrier enforcement personnel respondents. Representing nearly five percent of respondents for the first time this year, a separate analysis was completed to identify the top three concerns among law enforcement personnel (Table 5).

Table 5: Motor Carrier Enforcement Personnel Issues

Rank	Law Enforcement
1	Driver Distraction
2	Hours-of-Service
3	Driver Training Standards

⁶⁸ Eric Miller, “FMCSA to Consider Broker-Shipper Transparency,” *Transport Topics*, (June 27, 2023), <https://www.ttnews.com/articles/fmcsa-broker-transparency>.

Table 6: Top Industry Issue Rankings, 2014 – 2023

	Issue Rank									
	1	2	3	4	5	6	7	8	9	10
2023	Economy	Truck Parking	Fuel Prices	Driver Shortage	Driver Compensation	Lawsuit Abuse Reform	Driver Distraction	Driver Retention	Detention / Delay	Zero-Emission Vehicles
2022	Fuel Prices	Driver Shortage	Truck Parking	Driver Compensation	Economy	Detention / Delay	Driver Retention	CSA	Speed Limiters	Lawsuit Abuse Reform
2021	Driver Shortage	Driver Retention	Driver Compensation	Lawsuit Abuse Reform (previously Tort Reform)	Truck Parking	CSA	Detention / Delay	Infrastructure / Congestion / Funding	Insurance Cost / Availability	Diesel Technician Shortage
2020	Driver Shortage	Driver Compensation	Truck Parking	CSA	Insurance Cost / Availability	Driver Retention	Tort Reform	Economy	Detention / Delay	Hours-of-Service
2019	Driver Shortage	Hours-of-Service	Driver Compensation	Detention / Delay at Customer Facilities	Truck Parking	Driver Retention	ELD Mandate	CSA	Infrastructure / Congestion / Funding	Economy
2018	Driver Shortage	Hours-of-Service	Driver Retention	ELD Mandate	Truck Parking	CSA	Driver Distraction	Infrastructure / Congestion / Funding	Driver Health/Wellness	Economy
2017	Driver Shortage	ELD Mandate	Hours-of-Service	Truck Parking	Driver Retention	CSA	Cumulative Impacts of Regulation	Driver Distraction	Infrastructure / Congestion / Funding	Driver Health / Wellness
2016	ELD Mandate	Hours-of-Service	Cumulative Impacts of Regulations	Truck Parking	Economy	CSA	Driver Shortage	Driver Retention	Infrastructure / Congestion / Funding	Driver Distraction
2015	Hours-of-Service	CSA	Driver Shortage	Driver Retention	Truck Parking	ELD Mandate	Driver Health / Wellness	Economy	Infrastructure / Congestion / Funding	Driver Distraction
2014	Hours-of-Service	Driver Shortage	CSA	Driver Retention	ELD Mandate	Truck Parking	Infrastructure / Congestion / Funding	Driver Health / Wellness	Economy	Driver Distraction

Note: **Bold** indicates first year in top ten.