

Industry Research Initiatives

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ATRI

Trucking industry's not-for-profit research organization

- **Safety**
- **Mobility**
- **Economic Analysis**
- **Technology**
- **Environment**

www.TruckingResearch.org

Board of Directors



Research Advisory Committee



2020 Top Industry Issues

1. Driver Shortage (1)
2. Driver Compensation (3)
3. Truck Parking (5)
4. Compliance, Safety, Accountability (8)
5. Insurance Cost / Availability (#3 in 2005)
6. Driver Retention (6)
7. Tort Reform (#8 in 2011)
8. Economy (10)
9. Detention / Delay (4)
10. Hours-of-Service (2)

CRITICAL ISSUES IN THE TRUCKING INDUSTRY – 2020



Presented to the
American Trucking Associations

Prepared by
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2020 Top Industry Issues

Commercial Drivers

1. Truck Parking
2. Driver Compensation
3. Detention / Delay
4. Hours-of-Service
5. Driver Training Standards
6. Automated Truck Technology
7. CSA
8. Driver Health & Wellness
9. Speed Limiters
10. ELD Mandate

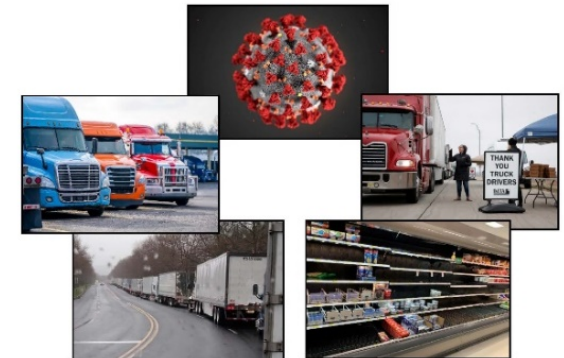
Motor Carriers

1. Driver Shortage
2. Driver Retention
3. CSA
4. Insurance Cost / Availability
5. Tort Reform
6. Economy
7. Transportation Infrastructure / Congestion / Funding
8. Driver Distraction
9. Detention / Delay
10. Hours-of-Service

COVID-19 Impacts

- **Joint survey with OOIDA Foundation**
- **5,000+ respondents over 2 weeks**
 - ◆ **77% drivers**
 - ◆ **68.6% fleets fewer than 50 trucks**
 - ◆ **65.5.% TL**

COVID-19 IMPACTS ON THE TRUCKING INDUSTRY



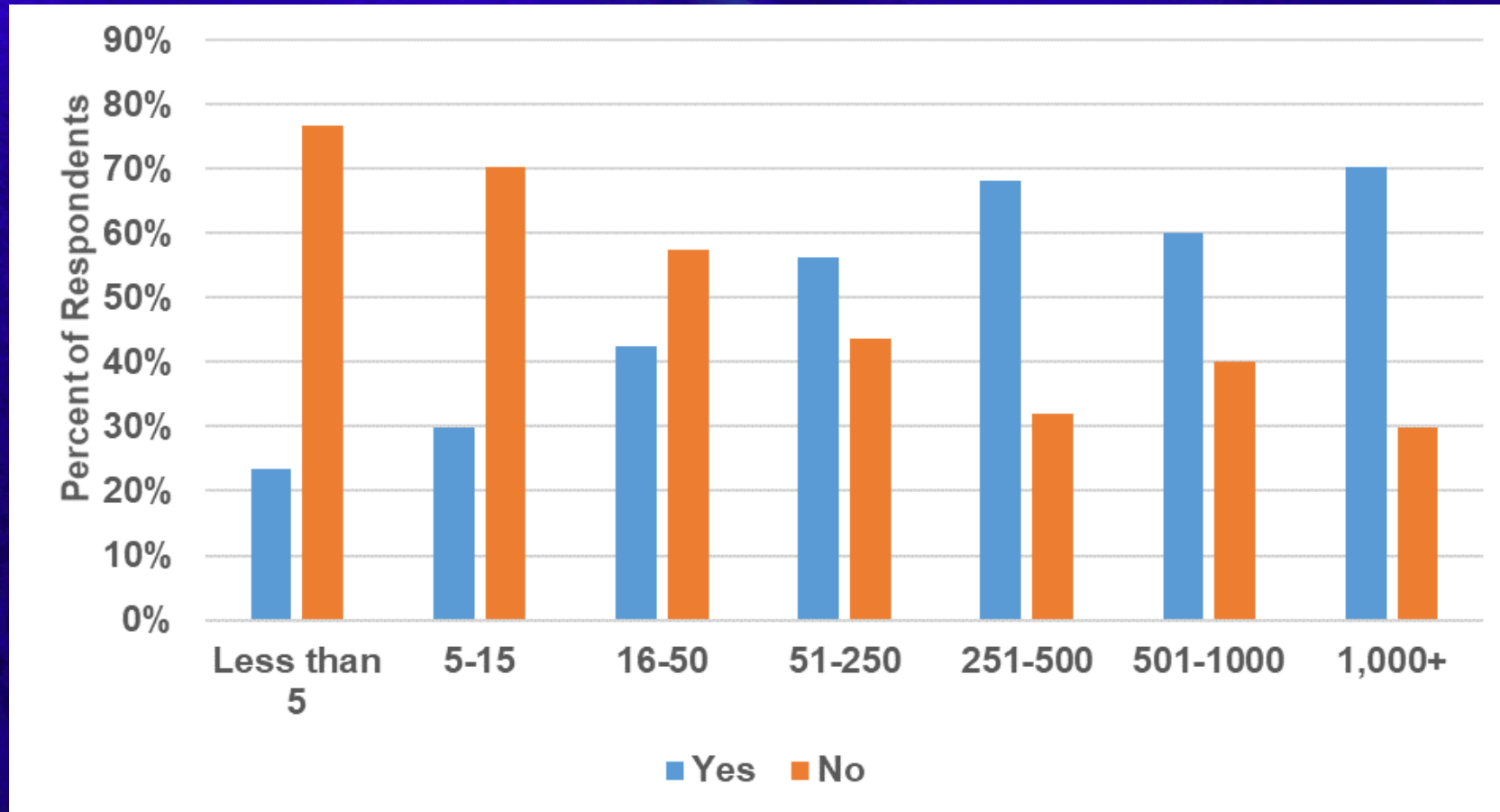
April 2020

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Disaster Response Plan in Place Pre-COVID



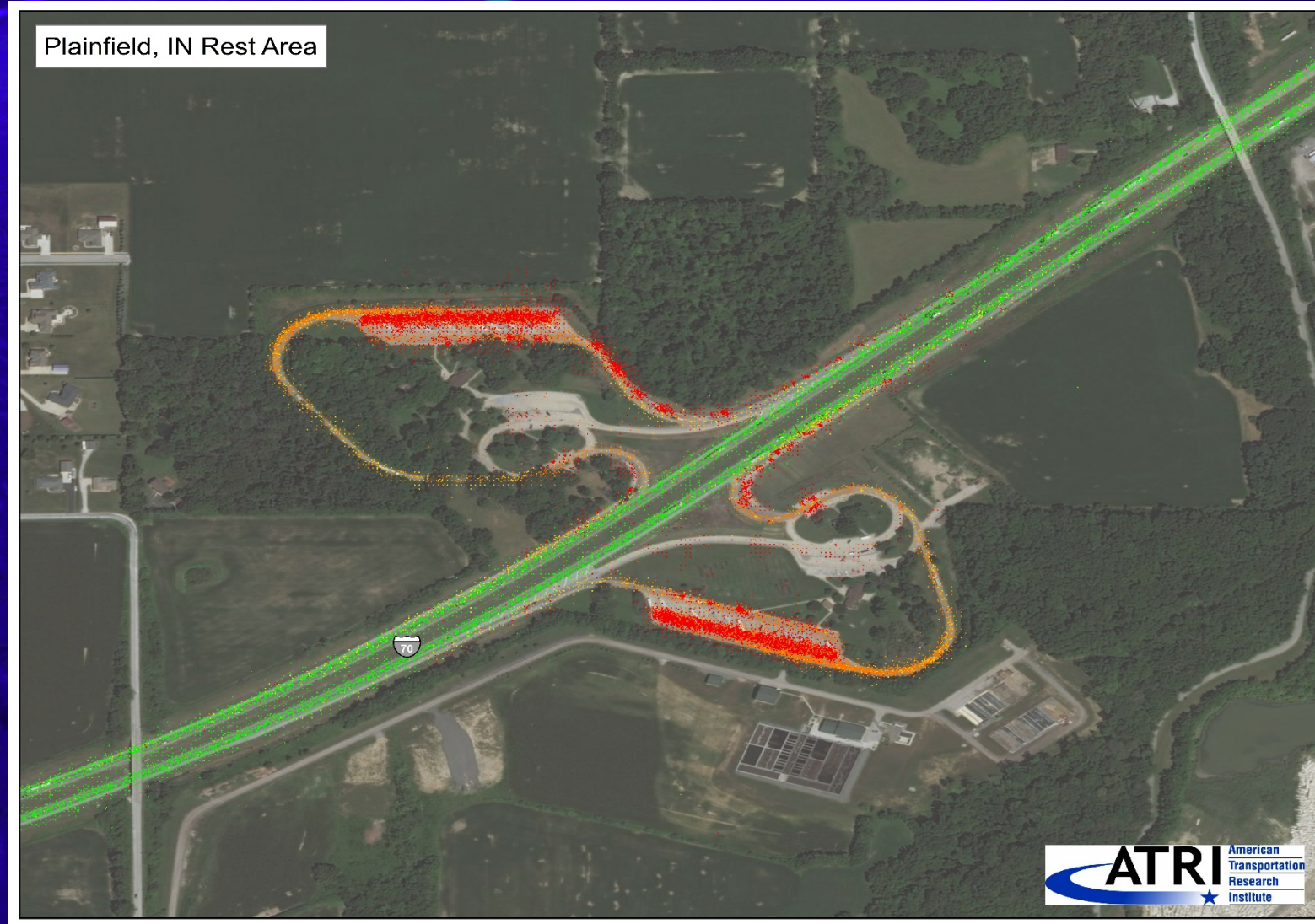
COVID-19 Impacts

- Overall, 44% reported truck parking “somewhat harder” or “much harder” to find
- Overall, 34% reported longer detention times; more pronounced among smaller fleets
 - ◆ 73% of respondents who reported longer detention times were from fleets of fewer than 50 trucks

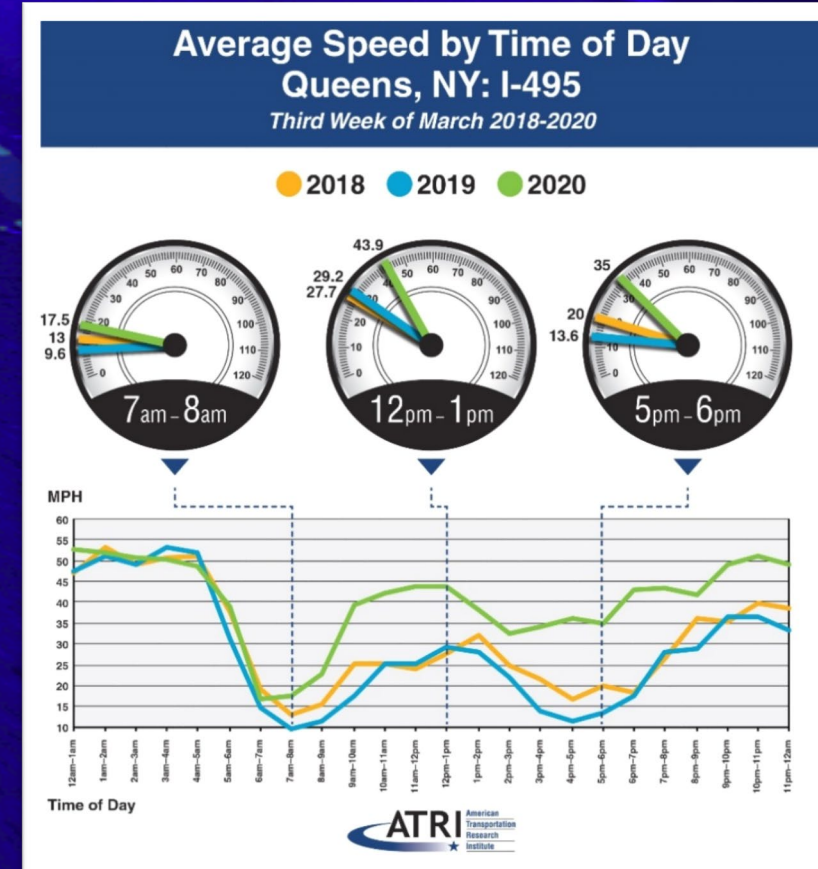
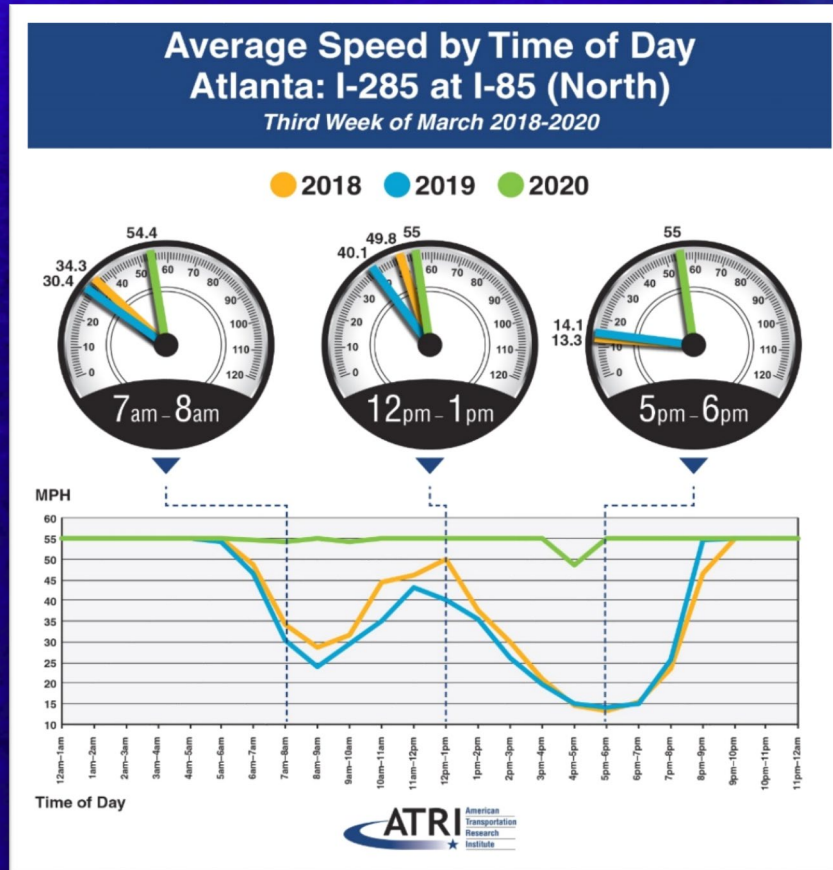
COVID-19 Impacts



No Vacancy

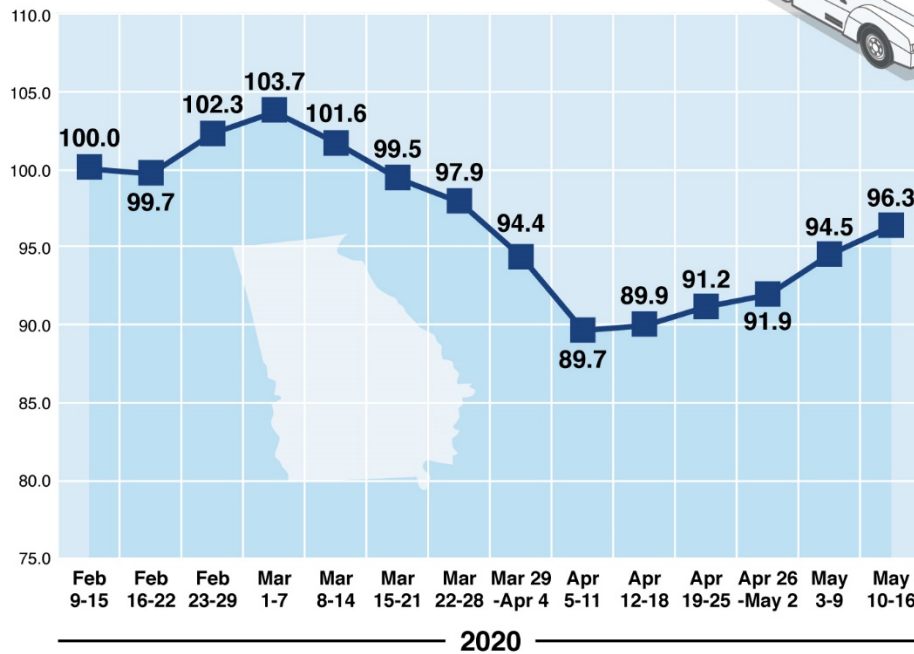


Congestion Down during COVID

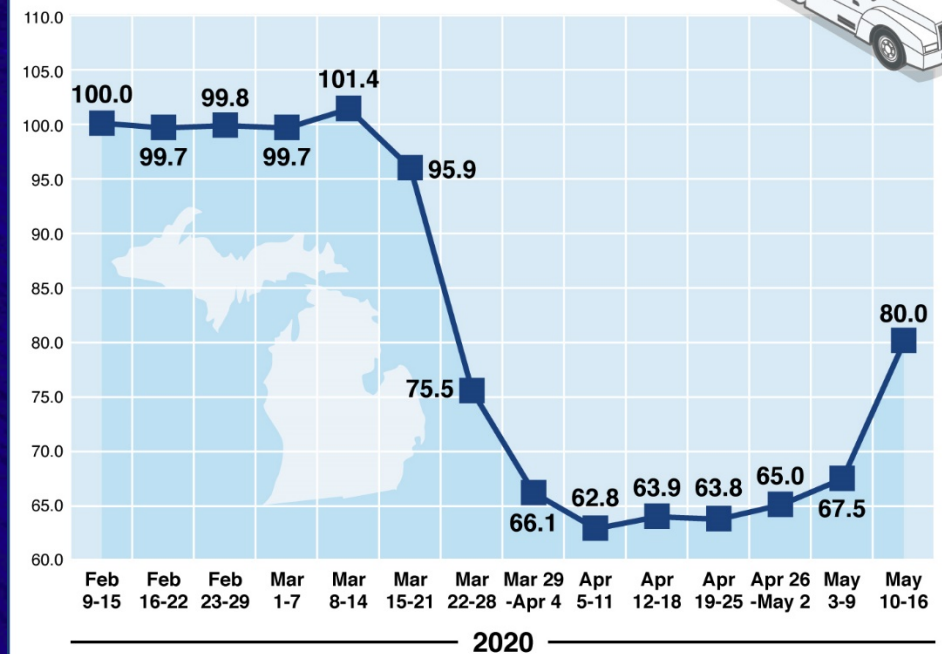
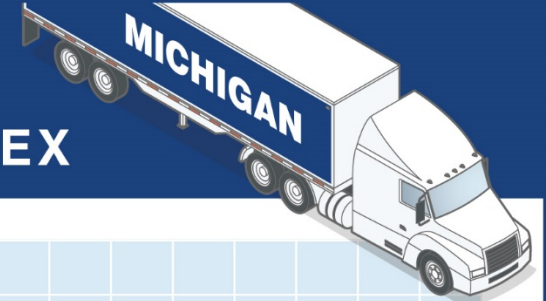


COVID Impacts

TRUCK ACTIVITY INDEX



TRUCK ACTIVITY INDEX



2021 Top Truck Bottlenecks

2021 TOP TRUCK BOTTLENECKS • BY THE NUMBERS

AVERAGE PEAK
HOUR TRUCK
SPEED:

**43.0
mph**



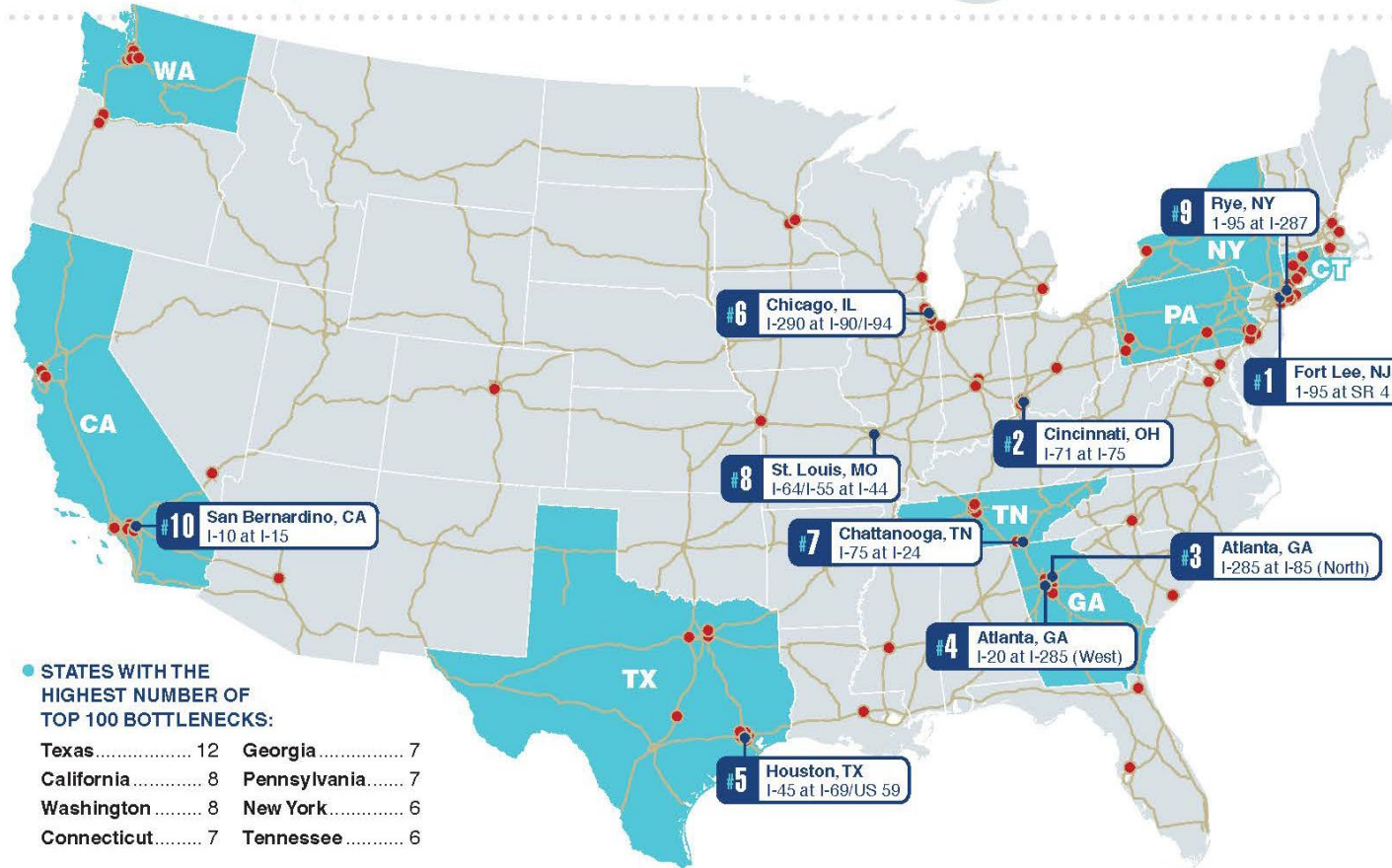
33.9%
year-over-year

TOP 100 BOTTLENECKS
WITH AVERAGE TRUCK
SPEEDS <45 MPH:

25%

NUMBER OF STATES
WITH AT LEAST ONE
TOP 100 BOTTLENECK:

29

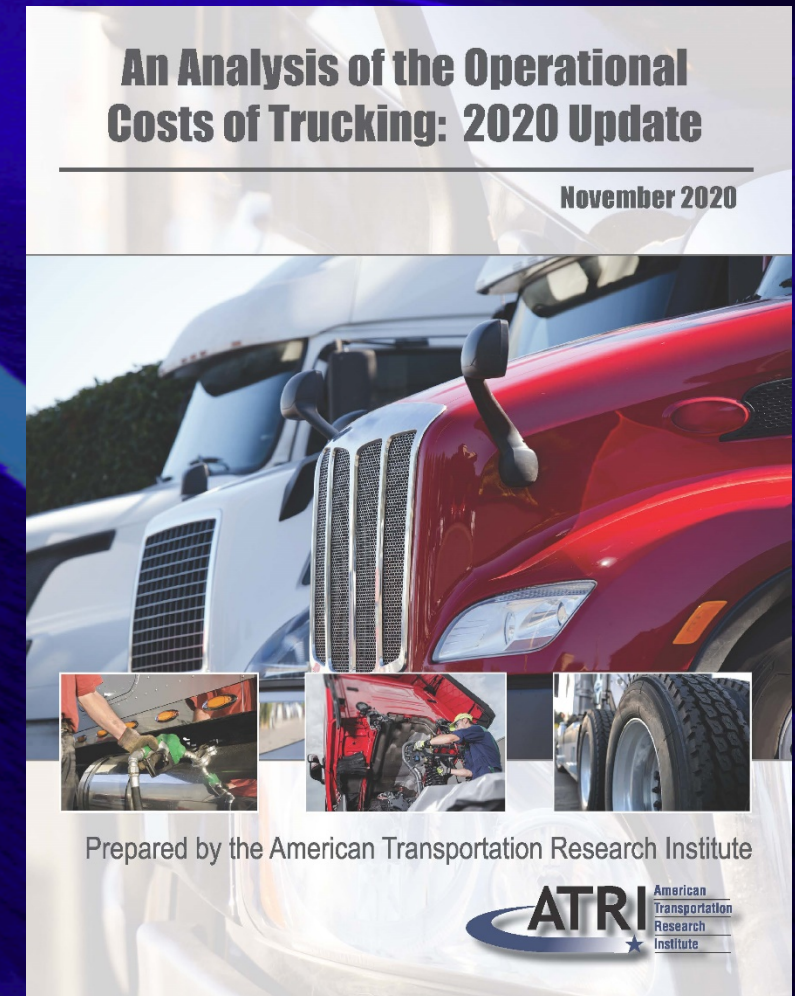


2021 Top 10 Truck Bottlenecks

Rank	Location	Average Peak Speed	Y-o-Y Change in Average Peak Speed
1	Fort Lee, NJ: I-95 at SR 4	31.3	39.4%
2	Cincinnati, OH: I-71 at I-75	40.1	11.5%
3	Atlanta, GA: I-285 at I-85 (North)	34.4	53.5%
4	Atlanta, GA: I-20 at I-285 (West)	40.9	12.6%
5	Houston, TX: I-45 at I-69/US 59	31.4	53.7%
6	Chicago, IL: I-290 at I-90/I-94	25.4	57.6%
7	Chattanooga, TN: I-75 at I-24	46.8	-1.8%
8	St. Louis, MO: I-64/I-55 at I-44	46.1	10.1%
9	Rye, NY: I-95 at I-287	45.7	12.0%
10	San Bernardino, CA: I-10 at I-15	40.7	25.1%

Operational Costs of Trucking

- Collects and analyzes real-world motor carrier operational data
- Covers data 2008-2019
- Calculates costs by mile and by hour
- Includes sector, regional analyses
 - ◆ TL, LTL, Specialized/Other
 - ◆ Small vs Large Fleets



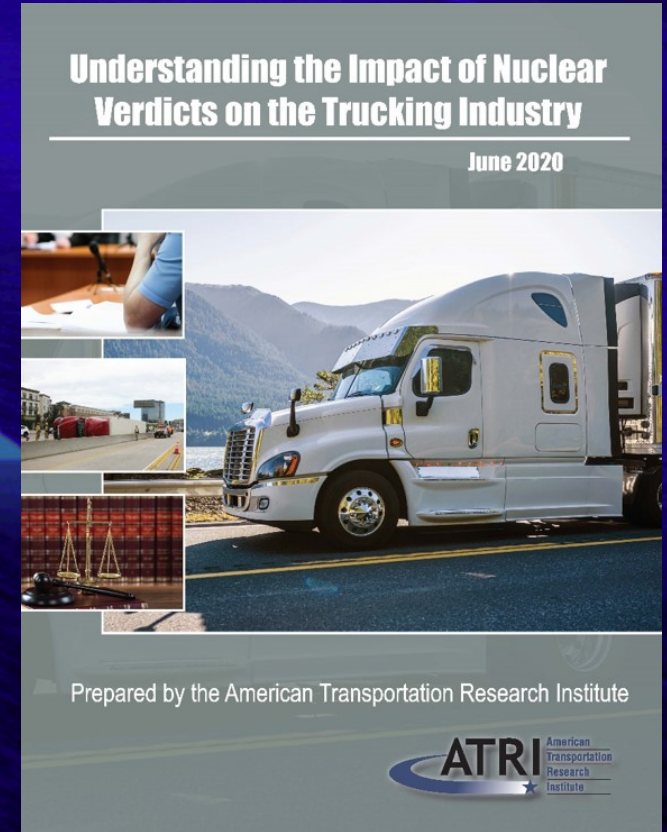
Operational Costs of Trucking

Average Carrier Costs per Mile

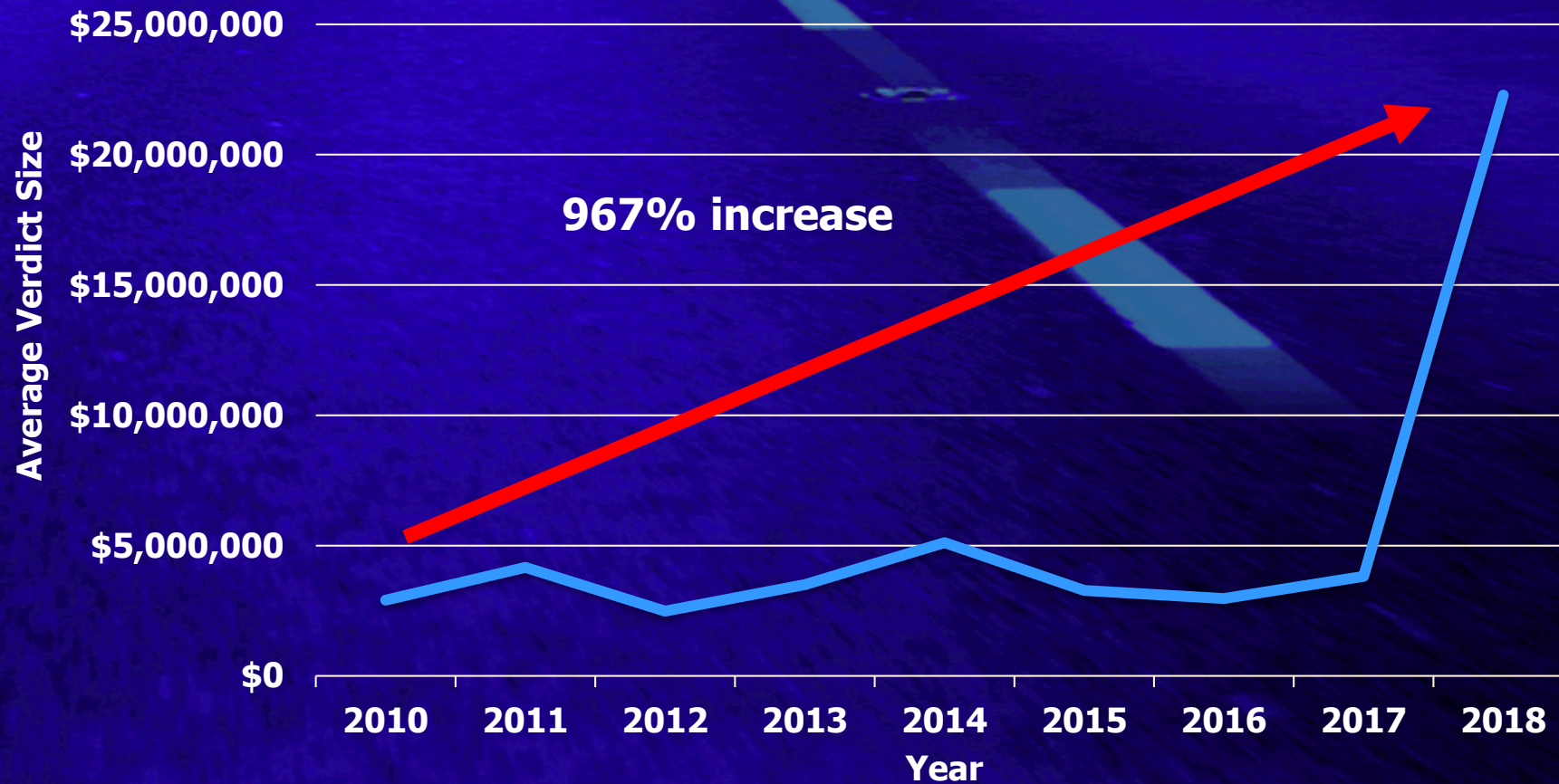
Motor Carrier Costs	2015	2016	2017	2018	2019
Vehicle-based					
Fuel Costs	\$0.403	\$0.336	\$0.368	\$0.433	\$0.396
Truck/Trailer Lease or Purchase Payments	\$0.230	\$0.255	\$0.264	\$0.265	\$0.259
Repair & Maintenance	\$0.156	\$0.166	\$0.167	\$0.171	\$0.143
Truck Insurance Premiums	\$0.074	\$0.075	\$0.075	\$0.084	\$0.068
Permits and Licenses	\$0.019	\$0.022	\$0.023	\$0.024	\$0.023
Tires	\$0.043	\$0.035	\$0.038	\$0.038	\$0.036
Tolls	\$0.020	\$0.024	\$0.027	\$0.030	\$0.034
Driver-based					
Driver Wages	\$0.499	\$0.523	\$0.557	\$0.596	\$0.533
Driver Benefits	\$0.131	\$0.155	\$0.172	\$0.180	\$0.160
TOTAL	\$1.575	\$1.592	\$1.691	\$1.821	\$1.652

Nuclear Verdict Impacts

- Comprehensive analysis of 600+ cases spanning 15 years
- In-depth interviews with defense and plaintiff attorneys, as well as insurance industry and safety experts
- Detailed analysis of litigation financing
- Mitigation strategies from other industries



Average Verdicts Greater than \$1 Million by Year



Nuclear Verdict Impacts

Motor Carrier Costs

- Insurance companies are increasing premiums, implementing stricter underwriting standards / more selective with who they insure
- All motor carriers are experiencing an increase in premiums, regardless of size or year established
- The rising cost of insurance is causing carriers to close their doors

Coming Soon

- **A Practical Analysis of a National VMT Tax System**
- **Motor Carrier Survey – Rising Costs of Insurance**
- **Expanded Pilot Test of ATRI Younger Driver Assessment Tool**
- **Crash Predictor Model 2021 Update**

Questions?

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