

CRITICAL ISSUES IN THE TRUCKING INDUSTRY – 2021



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950 North Glebe Road
Arlington, VA 22203
(703)838-1966
ATRI@trucking.org
TruckingResearch.org

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Critical Issues in the Trucking Industry – 2021

At the start of 2021, the U.S. had two COVID vaccines approved for use and a third would soon follow, with hopes that the country, and its economy, could begin to turn the corner on the pandemic. However, the myriad challenges faced in 2020 as a result of the pandemic would linger into – and in many cases become exacerbated – in the new year.

Global supply chain disruptions initiated by the pandemic in 2020 continued into 2021 as shortages of everything from computer chips to construction materials led to higher prices and inflation, with no signs they are dissipating. Backlogs at the nation's ports are at historic levels while economists predict that the combination of too few shipping containers – and the inability to move them off ships in a timely manner – likely points to a bleak holiday shopping season.¹ Some economists even believe we are on the cusp of an international recession.²

This year has also seen a new administration and a new Congress, and with those changes, a new focus on social programs, climate change, and workforce issues. The post-pandemic economy has included a record infusion of stimulus, a push for zero emission vehicles, labor shortages and vaccine mandates for employers with over 100 employees.

Through it all, the trucking industry has continued as a foundational component of the nation's economy, delivering essential goods to help businesses reopen, stocking stores and restaurants, keeping hospitals and schools supplied, and delivering fuel as the nation returned to travel for work and pleasure.

However, supporting the post-pandemic economic recovery has not been without its challenges for the trucking industry. Some in the industry believe the perennial labor shortages are worse now than ever before, new equipment cancellations further exacerbate the capacity issue, and our industry's workplace – the nation's highways – continues to fall into disrepair as political infighting has stymied progress on meaningful infrastructure investment.

Given all that the industry has experienced over the past 18 months, it is imperative that industry stakeholders understand the interplay of the various issues confronting the trucking industry. For the past 17 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)

¹ Ronan, Dan. "Port Leaders Warn of Supply Chain Challenges as Holidays Near." Transport Topics. September 30, 2021. Available online: <https://www.ttnews.com/articles/port-leaders-warn-supply-chain-challenges-holidays-near>

² Amaro, Silvia. "IMF cuts its global growth forecast, citing supply disruptions and the pandemic." CNBC. October 12, 2021. <https://www.cnbc.com/2021/10/12/imf-cuts-growth-forecast-as-supply-disruptions-covid-pandemic-weighs.html>

have leveraged ATRI's Top Industry Issues report to develop proactive industry-centric strategies and programs.

Methodology

ATRI's 2021 Top Industry Issues (TII) analysis relies on a robust data collection methodology. The initial issues and related counterstrategies were first identified and synthesized in collaboration with various freight stakeholder groups. ATRI then conducted a large-scale survey distribution using its own contact database (23,000+), ATRI's regular Sirius/XM radio shows, major trucking industry trade press, and through the 50 State Trucking Associations. The 2021 survey launched September 8, 2021 and remained open for responses through October 15, 2021.

Survey respondents were asked to select their top three choices from the list of 30 critical issues, and subsequently rank their top three preferred strategies that correspond to each selected issue. To capture any missing issues, write-in responses were allowed for both the top issues and the strategies.

ATRI develops the Top 10 list using a formula assigning quantitative values to respondents' rankings of issues facing the industry. An issue that is ranked by a respondent as most important receives three points, while an issue ranked second receives two points and an issue ranked third receives one point.

The sum total of points for each issue is used to generate a prioritized list of top industry concerns. The issue with the highest number of points is identified as the top industry issue and is given an Industry Concern Index (ICI) to illustrate the relative level of concern from one issue to the next. The top-ranked issue receives an ICI of 100, and then all other issues are indexed against this value. For example, an issue with an ICI of 50 is calculated to have half the level of concern as the top issue.

Each respondent was asked to rank three of the pre-identified strategies that address each of their top three issues. The strategies were identified over the course of the year by trucking stakeholders for their potential to impact or mitigate each industry challenge. The strategies are ranked by the percentage of respondents selecting each strategy as their number one choice.

Over 2,500 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 respondents represented motor carrier personnel (52.4%), commercial drivers (24.1%), and other industry stakeholders (23.5%), 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 for both company drivers and owner-operators / independent contractors.

This report presents the findings of the 2021 annual survey and analysis, and compares the findings of previous years' results (Table 4) – providing insight into both the changing and emerging priorities of the trucking industry.

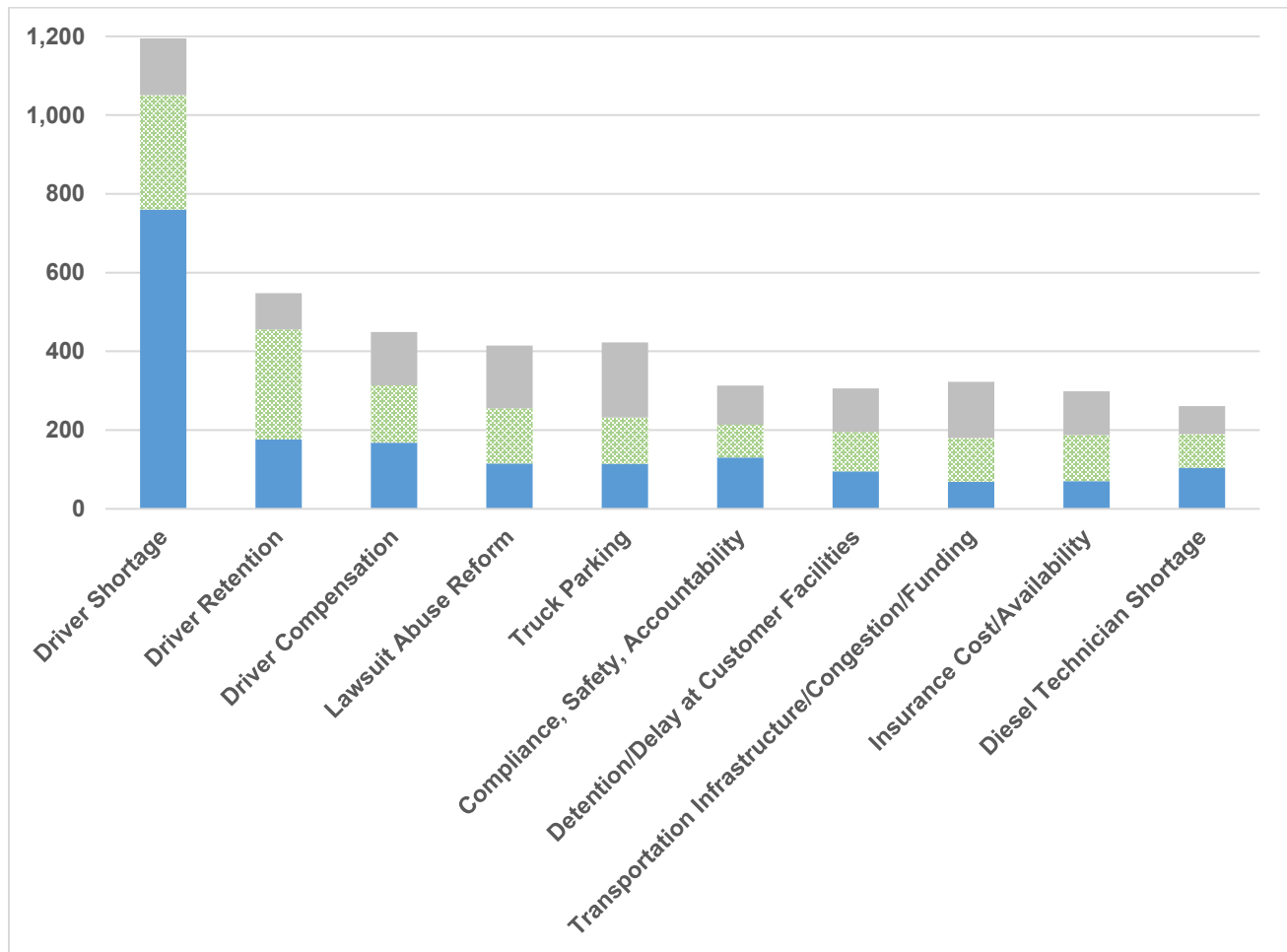
The Top 10 Trucking Industry Issues

In a year marked by growing concerns over global supply chain disruptions, workforce demands placed the **Driver Shortage** at the top of the list once again, for the fifth year in a row. In fact, no other issue generated as many overall votes on the 2021 Top Industry Issues Survey, including the five percent of the commercial driver respondents who indicated the lack of available drivers was one of their top three industry concerns. Closely related to the Driver Shortage, **Driver Retention** was ranked as the number two industry issue, up four from its 2020 ranking.

Driver Compensation remained a top-three industry concern this year, with both truck drivers and motor carriers ranking it as one of their top concerns. **Lawsuit Abuse Reform**, previously referred to as Tort Reform in prior years' surveys, rose three spots this year to become the fourth highest industry issue. This reflects the industry's concerns over the increase in number and size of large verdicts, the tactics used by plaintiff attorneys to bias juries against the industry, and the resulting financial impact that these lawsuits have on the industry's ability to remain viable. Rounding out the top five in 2021 is the lack of available **Truck Parking**.

Further underscoring the industry's workforce challenges, a new issue emerged on this year's top 10. The **Diesel Technician Shortage** – ranked number 10 this year – is viewed by some in the industry as becoming as severe over time as the driver shortage, and fleets are scrambling to hire and retain skilled professionals to maintain their growingly complex equipment (Figure 1).

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. Driver Shortage

Ranked 1 st 30.1%	Ranked 2 nd 12.3%	Ranked 3 rd 6.2%	Total Share 47.4%	Industry Concern Index 100
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For the fifth consecutive year, the Driver Shortage is the trucking industry's top concern on the overall list, with more than four times as many first-place votes as the next issue on the 2021 Top Industry Issues list. According to the American Trucking Associations, the industry's current shortage of over 60,000 drivers could grow to over 160,000 by 2028.³ Myriad pressures are contributing to the shortage including growing freight demand,⁴ the aging driver workforce, drivers who left the industry over health concerns during COVID,⁵ new entrant training and licensing backlogs from COVID-related closures,⁶ and drivers who are not initiating the return-to-duty process after positive drug tests.⁷ The recently announced vaccine mandate for all employers over 100 employees has raised concerns that additional drivers will leave the industry rather than get the COVID vaccine.⁸

Proposed Strategies (in rank order):

a) *Advocate for expedited launch of the DRIVE Safe Act pilot program to expand interstate CDL eligibility for 18-20 year olds.* A major driver recruitment challenge is the federal requirement to be 21 years of age before obtaining a Commercial Driver's License (CDL) in order to operate across state lines. This creates a three-year gap following high school during which potential new entrant drivers seek employment in other industries. The DRIVE Safe Act, first introduced in Congress in 2018 and reintroduced in 2021, would provide an avenue for 18-20 year olds to drive in interstate operations. The trucking industry has long-supported the DRIVE Safe Act⁹ and expediting the launch of the Act's proposed pilot program is the preferred strategy of 45.0 percent of respondents.

b) *Develop new outreach initiatives targeted toward high school students and young adults.* The average age of over-the-road drivers is 46 and for new driver entrants, the

³ Costello, Bob and Alan Karickhoff. "Truck Driver Shortage Analysis 2019." American Trucking Associations. July 2019.

⁴ Fisher, Josh. "Freight Market demand grows as truck and trailer inventory shrinks: ACT." Fleet Owner. August 17, 2021. Available online: <https://www.fleetowner.com/news/article/21172490/freight-market-demand-grows-as-truck-and-trailer-inventory-shrinks-act>

⁵ ATRI & OOIDA. "COVID-19 Impacts on the Trucking Industry." American Transportation Research Institute and the OOIDA Foundation. April 2020.

⁶ Commercial Vehicle Training Association. "Coronavirus-related Agency Closures Halt Licensing of New Truck Drivers." For Construction Pros. April 28, 2020.

⁷ Federal Motor Carrier Safety Administration. "Return-to-Duty Process [Table]." U.S. Department of Transportation. August 2021. Available online: <https://clearinghouse.fmcsa.dot.gov/Resource/Index/monthly-report-Aug2021>

⁸ Shabazi, Rudabeh. "Supply chain: Some truckers chose to quit instead of complying with federal vaccine mandate." Nexstar Media Wire. September 30, 2021. Available online: <https://www.wkbn.com/news/national-world/supply-chain-some-truckers-chose-to-quit-instead-of-complying-with-federal-vaccine-mandate/>

⁹ American Trucking Associations. "Trucking Industry Applauds Introduction of DRIVE Safe Act." Press Release. March 10, 2021.

average age is 35,¹⁰ while data from the U.S. Census Bureau shows that 27.4 percent of the industry's driver workforce is over 55 years of age.¹¹ Faced with this aging workforce and the accompanying pace of driver retirements, the industry is looking to attract younger employees. Research to identify the best ways to integrate 18-20 year olds into trucking careers was the top research priority identified by ATRI's Research Advisory Committee in 2021¹² and similarly, 40.5 percent of respondents believe that industry outreach to high school students and young adults is the best approach for attracting new entrants.

c) *Advocate for expansion of the U.S. EB-3 Permanent Work Authorization permit to recruit qualified candidates from other countries.* The EB-3 Permanent Work Authorization permit is an employer-sponsored permit for "Skilled, Professional, or Other Workers."¹³ This permanent work authorization is of particular interest because, as opposed to the H-2B Visa, it allows individuals to reside permanently in the United States under certain conditions. Some in the industry have used the EB-3 Work Authorization to build out their driver workforce.¹⁴ Expanding this program to more easily allow fleets to recruit drivers from other countries is the preferred strategy of 11 percent of respondents.

¹⁰ Costello, Bob and Alan Karickhoff. "Truck Driver Shortage Analysis 2019." American Trucking Associations. July 2019.

¹¹ Current Population Survey (CPS) 2019. U.S. Census Bureau and Bureau of Labor Statistics.

¹² American Transportation Research Institute. "ATRI Board Approves Research Agenda for 2021." Press Release. May 25, 2021.

¹³ U.S. Citizenship and Immigration Services. "EB-3: Employment-Based Immigration – Skilled Workers – Professionals and Other Workers." USCIS. <https://www.uscis.gov/forms/explore-my-options/eb-3-employment-based-immigration-skilled-workers-professionals-and-other-workers>

¹⁴ Abt, Neil. "Fleets turn to immigration programs to find truck drivers". Fleet Owner. Oct. 23, 2019. Available online: <https://www.fleetowner.com/fleet-management/article/21704400/fleets-turn-to-immigration-programs-to-find-truck-drivers>

2. Driver Retention

Ranked 1 st 7.0%	Ranked 2 nd 11.8%	Ranked 3 rd 4.0%	Total Share 21.7%	Industry Concern Index 39.3
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With the Driver Shortage ranked as the top industry issue for the fifth year in a row, keeping those drivers currently in the industry – Driver Retention – rose four positions to become the second most critical issue overall this year. According to the American Trucking Associations, driver turnover at large truckload fleets was 92 percent at the end of 2020.¹⁵ Acknowledging the significant impacts that driver capacity is having on the supply chain, the U.S. Department of Transportation convened an industry roundtable earlier this year to explore potential solutions.¹⁶

Proposed Strategies (in rank order):

a) *Research and prioritize retention strategies, based on driver feedback and driver tenure data.* A slight majority of respondents (53.8%) believes that research is needed to quantify and disseminate the most successful retention strategies based on driver feedback and tenure as a professional driver, thus reducing turnover and churn. Beyond increasing driver pay and benefits, many fleets are now relying on driver feedback – on everything from equipment preferences to how customers treat drivers – to improve retention.¹⁷

b) *Evaluate the impact of truck driver benefits, including health insurance and retirement benefits, on driver retention.* ATRI's annual Operational Costs of Trucking analysis found that 70 percent or more of participating motor carriers provided a suite of benefits to their drivers including health insurance (91%), paid vacation (88%), dental insurance (71%), and 401k (70%).¹⁸ ATA's 2020 Driver Compensation Report documented similar percentages of fleets providing an expanded list of driver benefits.¹⁹ Understanding the impact of these benefit offerings on retention was the preferred strategy of 30.3 percent of respondents.

c) *Quantify the relationship between safety technology deployment (e.g. cameras, speed limiters, active braking systems) and driver satisfaction and retention.* Baseline data from FMCSA's "Tech-Celerate Now" program – designed to encourage the deployment of advanced safety systems – found that "driver acceptance" was listed as a top concern by both motor carriers and drivers as one of the issues impacting

¹⁵ American Trucking Associations. "Turnover Remained Unchanged at Large Truckload Fleets in Fourth Quarter." Press Release. March 29, 2021.

¹⁶ "DOT Roundtable Explores Truck Driver Recruiting, Retention Challenges." Heavy Duty Trucking. July 8, 2021.

¹⁷ Freeze, Michael. "The Search for Drivers and the Fight to Keep Them." Transport Topics. August 20, 2021.

Available online: <https://www.ttnews.com/articles/search-drivers-and-fight-keep-them>

¹⁸ Murray, Daniel and Nathan Williams. "An Analysis of the Operational Costs of Trucking: 2020 Update." American Transportation Research Institute. Arlington, VA. November 2020. Available online: <https://truckingresearch.org/atri-research/operational-costs-of-trucking/>

¹⁹ Costello, Bob and Alan Karickhoff. "Truck Driver Shortage Analysis 2019." American Trucking Associations. July 2019.

adoption rates.²⁰ Understanding driver concerns and how to mitigate them can pave the way for increased adoption of advanced safety systems and as such, quantifying this relationship is the preferred strategy of 13.7 percent of respondents.

²⁰ Murray, Dan. Tech-Celerate Now Presentation. ATRI Research Advisory Committee Research Update Webinar. October 12, 2021.

3. Driver Compensation

Ranked 1 st 6.7%	Ranked 2 nd 6.2%	Ranked 3 rd 5.8%	Total Share 17.8%	Industry Concern Index 31.0
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For the third year in a row, Driver Compensation is a Top-10 issue. Many drivers believe that the *driver shortage* and *driver compensation* are one in the same issue, and that the solution to the shortage is simply to increase driver pay. Accordingly, in this year's survey, one in three drivers (33%) ranked compensation as one of their top three industry concerns. However, as fleets continue to raise driver pay to recruit and retain drivers in response to the shortage, motor carriers are also concerned about driver compensation and the sustainability of continually raising driver pay.²¹ Among motor carrier respondents, 15 percent ranked driver compensation as one of their top three industry concerns.

Proposed Strategies (in rank order):

a) *Analyze truck driver compensation in relation to other competing employment sectors (e.g. construction).* The tremendous growth in e-commerce, fueled in part by the pandemic, has created an unprecedented number of jobs for local and regional drivers, creating additional competition for over-the-road drivers.²² Additionally, trucking fleets often compete with other industries, such as construction, that may offer similar or better pay models, along with providing the opportunity to be home every night. Understanding how driver pay stands up against competing industries is the preferred strategy of 42.3 percent of respondents.

b) *Research and assess the effectiveness of carrier retention programs that financially incentivize drivers for performance in the areas of safety, fuel economy, and trip productivity.* Trucking fleets are more frequently turning to other types of financial incentives for their drivers as part of an overall compensation package. ATRI's annual Operational Costs of Trucking tracks these financial incentives and in the 2020 Ops Costs study, participating fleets reported average annual driver safety bonuses of \$1,373 and average annual retention bonuses of \$1,218, representing 11 and 81 percent increases over the previous years' amounts, respectively.²³ Studying the efficacy of various bonuses for rewarding and retaining drivers is the recommended strategy of 30.5 percent of respondents.

c) *Quantify the relationship between driver compensation models and driver satisfaction and productivity.* Driver compensation is just part of the equation for finding and keeping drivers. Other factors such as home time and equipment play a key role in driver satisfaction. However, compensation does matter to drivers and as such, the

²¹ Duffy, Kate. "Pay for truckers is soaring — one said his salary shot up to \$70,000 from \$40,000. But it's not enough to fill thousands of driver vacancies." Business Insider. June 1, 2021.

²² Fuller, S.L. "The rise of LTL: How e-commerce changed the middle mile." Supply Chain Dive. October 6, 2021.

²³ Murray, Dan and Nathan Williams. "An Analysis of the Operational Costs of Trucking: 2020 Update." American Transportation Research Institute. Arlington, VA. November 2020. <https://truckingresearch.org/atri-research/operational-costs-of-trucking/>

industry continues to explore new and expanded pay models to increase driver satisfaction including salaried, hourly, per-load and percentage-of-load. As such, 24.7 percent of respondents believe the best strategy for addressing driver compensation is to quantify the relationship between pay models and driver satisfaction and productivity.

4. Lawsuit Abuse Reform

Ranked 1 st 4.6%	Ranked 2 nd 5.9%	Ranked 3 rd 6.9%	Total Share 16.4%	Industry Concern Index 26.1
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Lawsuit Abuse Reform (previously referred to as Tort Reform in prior years' surveys) rose three spots this year to become the fourth highest issue of concern. Significant attention has been brought to the issues surrounding truck crash litigation over the past two years including the rise in nuclear verdicts; ATRI's 2020 Nuclear Verdicts study documented a 967 percent increase in average verdict size between 2010 and 2018.²⁴ State-level advocacy has resulted in several favorable legislative wins for the trucking industry recently, including reforms to seat-belt gag rules and limits on inflated medical costs.²⁵

Proposed Strategies (in rank order):

a) *Advocate for elimination of "phantom" damages.* There is often a large delta between billed medical costs versus paid medical costs resulting from a crash. These "phantom" damages can create a non-compensatory windfall for the plaintiff and plaintiff's attorney. 45.1 percent of respondents believe that elimination of phantom damages is the top approach for lawsuit abuse reform.

b) *Encourage Congress to expand federal court jurisdiction to allow motor carrier defendants to take their highway accident cases into federal court as appropriate.* The ability to take a truck-involved crash case to federal court is limited by a number of criteria and rules, but it typically involves "diversity jurisdiction" that allows a case to be tried in federal court if the parties have different domiciles and the amount in question is greater than \$75,000.²⁶ ATRI's Nuclear Verdicts research²⁷ identified the move to federal court as a favorable litigation practice, and 31.1 percent of respondents believe expanding the ability to do so is the best approach for combatting lawsuit abuse.

c) *Educate motor carriers and law enforcement on how to identify staged accidents, and advocate for legislation that makes it a criminal offense to stage an accident with a commercial motor vehicle.* In a case made famous in New Orleans, over 25 individuals have now been convicted as part of a federal investigation into staged accidents with tractor-trailers. As part of the FBI's "Operation Sideswipe," over 40 defendants have been charged in an estimated 100 crashes in New Orleans.²⁸ 22.9 percent of respondents believe that better equipping the industry to identify staged accidents and

²⁴ Murray, Daniel, Nathan Williams and Erin Speltz. "Understanding the Impact of Nuclear Verdicts on the Trucking Industry." American Transportation Research Institute. Arlington, VA. June 2020.

²⁵ Miller, Eric. "Trucking Notches Wins in Lawsuit Abuse Legislation." Transport Topics. June 2, 2021. Available online: <https://www.ttnews.com/articles/trucking-notches-wins-lawsuit-abuse-legislation>

²⁶ "Federal vs. State Courts – Key Difference." June 20, 2016. Available online: <https://litigation.findlaw.com/legal-system/federal-vs-state-courts-key-differences.html>

²⁷ Murray, Daniel, Nathan Williams and Erin Speltz. "Understanding the Impact of Nuclear Verdicts on the Trucking Industry." American Transportation Research Institute. Arlington, VA. June 2020.

²⁸ Miller, Eric. "28th Conspirator Convicted in Staged Accidents With Trucks." Transport Topics. October 12, 2021. Available online: <https://www.ttnews.com/articles/28th-conspirator-convicted-staged-accidents-trucks>

more aggressively prosecuting those cases is the best strategy for lawsuit abuse reform.

5. Truck Parking

Ranked 1 st 4.5%	Ranked 2 nd 5.0%	Ranked 3 rd 8.2%	Total Share 16.8%	Industry Concern Index 25.6
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This is the 10th year that the lack of available truck parking has made the top 10 list of industry concerns, and among commercial drivers it has consistently ranked in their top 3. In 2020, when a number of states closed public rest areas due to COVID concerns,²⁹ truck parking was the number one concern among truck drivers. Earlier this year a provision was included in the U.S. House highway bill that would have provided nearly \$1 billion in truck parking grants to begin to alleviate the shortage but it was subsequently removed.³⁰

Proposed Strategies (in rank order):

a) *Create a new dedicated federal funding program designed to increase truck parking capacity at freight-critical locations.* More than 38 percent of respondents believe that dedicated federal funding for truck parking is the best solution for addressing this perennial industry challenge. However, the recent removal of the \$1 billion truck parking grant program from the bill makes this strategy less likely to be achieved, creating significant frustration among industry groups.³¹

b) *Encourage local and regional governments to reduce the regulatory burdens limiting the construction and expansion of truck parking facilities near major metropolitan areas.* Truck parking capacity is a challenge across the nation but particularly so in and around major metropolitan areas, where population densities drive increased consumer demand for truck freight, but land availability and price make it difficult to build truck parking facilities. Adding to that complexity are the regulatory hurdles imposed by local governments on siting parking facilities near business and commercial districts that rely on truck transportation for delivery of essential goods.³² 32.9 percent of respondents believe that addressing the truck parking issue at the local and regional level is the best strategy.

c) *Advocate for states to expand the availability of accurate, real-time truck parking availability information on roadside changeable/dynamic message signs.* One solution that states have deployed to help drivers locate available parking is real-time parking information delivered via smart phone apps or roadside changeable message signs that provide real-time parking space counts at upcoming exits. This allows a driver to make

²⁹ ATRI & OOIDA. "COVID-19 Impacts on the Trucking Industry." American Transportation Research Institute and the OOIDA Foundation. April 2020. <https://truckingresearch.org/2020/05/05/atri-and-oida-covid-19-impacts-on-the-trucking-industry/>

³⁰ Mulero, Eugene. "House Transportation Reps in GOP Press for Truck Parking." Transport Topics. September 27, 2021. Available online: <https://www.ttnews.com/articles/house-transportation-reps-gop-press-truck-parking>

³¹ Gallagher, John. "\$3.5 trillion spending bill – and not one penny for truck parking." FreightWaves. September 15, 2021. <https://www.freightwaves.com/news/no-truck-parking-money-oida-rips-dems-for-funding-snub>

³² Commendatore, Cristina. "Disconnect looms between truck parking capacity and need." FleetOwner. December 8, 2020. Available online: <https://www.fleetowner.com/safety/article/21149734/disconnect-looms-between-truck-parking-capacity-and-need>

parking decisions without having to spend time exiting the roadway to check space availability. ATRI's recent study on truck parking information systems found that 15 percent of drivers rely exclusively on roadside changeable message signs for their parking information.³³ Encouraging states to expand the availability of this truck parking information is the preferred strategy of 26.5 percent of respondents.

³³ Murray, Daniel and Alexandra Shirk. "Truck Parking Information Systems: Truck Driver Use and Perceptions." American Transportation Research Institute. Arlington, VA. June 2021. Available online: <https://truckingresearch.org/2021/06/14/truck-driver-perspectives-on-truck-parking-information-systems-june-2021/>

6. Compliance, Safety, Accountability (CSA)

Ranked 1 st 5.2%	Ranked 2 nd 3.5%	Ranked 3 rd 4.3%	Total Share 12.4%	Industry Concern Index 21.9
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A review of CSA's ranking in the Top Industry Issues Survey over the years (Table 4) illustrates the industry's mixed reviews of FMCSA's safety measurement system, first implemented in 2010. In 2012 CSA was the number one industry concern and as recently as 2019, it was near the bottom of the list at number eight. This year, CSA ranks number six overall. CSA ranks fourth among motor carrier respondents and 10th among driver respondents (Table 2).

Proposed Strategies (in rank order):

a) *Work with FMCSA to update its carrier prioritization methodology, improve its accuracy, and enhance transparency in CSA.* Over four years ago the congressionally mandated National Academies of Sciences study was released detailing how CSA could be improved utilizing the Item Response Theory (IRT) model. While the agency has yet to deploy the IRT and there is no current timeline for its rollout,³⁴ 42.8 percent of respondents believe that continuing to work with FMCSA to update its carrier prioritization methodology – using IRT or some other method – is the best approach for improving CSA.

b) *Advocate for FMCSA to regularly review and evaluate the list of crash types available for reclassification as non-preventable.* FMCSA's Crash Preventability Determination Program became permanent (after an initial pilot program) in 2020.³⁵ The agency now allows for review of 16 specific crash types through a Request for Data Review (RDR) submitted through the DataQs system.³⁶ However, 32.6 percent of respondents believe that the best strategy for improving CSA is for the agency to regularly review and evaluate the list of crash types eligible for review.

c) *Encourage FMCSA to improve internal processes for reviewing Request for Data Reviews (RDRs) to improve turnaround time for RDRs related to the Crash Preventability Determination Program.* Motor carriers have expressed frustration in the lag time between submitting an RDR for a crash and getting a determination on whether the crash was preventable or not.³⁷ 19.2 percent of respondents believe that the shortening that lag time is the best approach for improving CSA.

³⁴ Miller, Eric. "Delays Continue for Potential New FMCSA System to Score Carrier Safety." Transport Topics. May 5, 2021. Available online: <https://www.ttnews.com/articles/delays-continue-potential-new-fmcsa-system-score-carrier-safety>

³⁵ Miller, Eric. "FMCSA Adopts Crash Accountability Program." Transport Topics. May 1, 2020. Available online: <https://www.ttnews.com/articles/fmcsa-adopts-crash-accountability-program>

³⁶ FMCSA. "Crash Preventability Determination Program." U.S. Department of Transportation. <https://www.fmcsa.dot.gov/sites/fmcsa.dot.gov/files/2021-09/CPDP%20Eligibility%20Guide.pdf>

³⁷ Heine, Max. "DataQs improvement trial nears, but lingering problems bother industry." Overdrive. March 1, 2021.

7. Detention/Delay at Customer Facilities

Ranked 1 st 3.8%	Ranked 2 nd 4.2%	Ranked 3 rd 4.8%	Total Share 12.1%	Industry Concern Index 19.8
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For the third year in a row, Detention/Delay at Customer Facilities is a top-10 industry concern, this year up two spots to number seven overall. The increase in delays creates cascading impacts for drivers as their available hours-of-service are wasted. They are often denied access to restroom facilities while waiting, and are in many cases not allowed to remain at a customer facility if they run out of available driving hours.³⁸ It is not surprising, therefore, that Detention/Delay at Customer Facilities is ranked as the second highest concern among commercial driver respondents (Table 2).

Proposed Strategies (in rank order):

a) *Identify best practices, technologies, and strategies that reduce or eliminate driver detention at shipper/receiver facilities.* A number of factors have been identified by truck drivers and motor carriers as contributing to excessive detention, including dock employee issues, product readiness, lack of dock space, overbooking, and lack of technology solutions, among others.³⁹ A plurality of respondents (40.5%) believe that the best solution for reducing detention is to identify, synthesize and promote the best practices and mitigating strategies that address top detention causes.

b) *Quantify impacts on detention times that may be associated with the ELD mandate.* The top strategy selected by 28.4 percent of respondents for addressing detention is to quantify how detention times have changed since the ELD mandate went into effect in December 2017. While using an ELD to electronically record a driver's times should provide irrefutable proof of detention and therefore force shippers and receivers to improve turn times for drivers, ATRI's detention impacts study found that only 17 percent of drivers reported that they were sharing ELD data with customers to document detention.

c) *Examine the potential for creation of a "Shipper of Choice" database to reduce detention times for carriers and drivers.* As documented in ATRI's Detention Impacts study, excessive delays create financial, operational and potentially safety-related concerns for the industry. To mitigate these challenges, the third strategy choice among respondents involves creation of a database identifying those customer locations where detention is minimized or non-existent. Particularly when industry capacity is tight, such a database could drive improvements across the supply chain as other shippers adopt strategies known to reduce detention.⁴⁰ Creating a Shipper of Choice database is the preferred strategy for 25.8 percent of respondents.

³⁸ Murray, Dan and Erin Speltz. "Driver Detention Impacts on Safety and Productivity." American Transportation Research Institute. Arlington, VA. September 2019. <https://truckingresearch.org/2019/09/04/driver-detention-impacts-on-safety-and-productivity/>

³⁹ Ibid.

⁴⁰ Leonard, Matt. "What does shipper of choice mean in 2021? Supply Chain Dive. January 21, 2021.

8. Transportation Infrastructure / Congestion / Funding

Ranked 1 st 2.7%	Ranked 2 nd 4.7%	Ranked 3 rd 6.2%	Total Share 12.8%	Industry Concern Index 19.0
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The trucking industry hauls 72.5 percent of the nation's freight tonnage and 80.4 percent of freight revenues,⁴¹ on the nation's roadway infrastructure. However, years of inattention by federal leaders has resulted in poorly maintained roads and traffic congestion that creates wear and tear on vehicles, wastes fuel and increases emissions, creates additional stress for drivers, and negatively impacts industry productivity. Each year there are new and more glaring examples of what happens when the U.S. fails to maintain its transportation infrastructure. In May of this year, the I-40 Hernando de Soto Bridge between Arkansas and Tennessee was taken out of service when a catastrophic crack was found during a routine inspection. An ATRI analysis of truck GPS data found that this one bridge closure increased average transit times from eight minutes to 84 minutes, costing the industry \$2.4 million for every day the bridge was out-of-service.⁴²

Proposed Strategies (in rank order):

a) *Prevent imposition of truck-only taxes.* In May of this year, Senator John Cornyn of Texas proposed a federal truck-only vehicle miles traveled (VMT) tax.⁴³ In a joint letter to the U.S. Senate Committee on Finance, the American Trucking Associations and the Owner-Operator Independent Driver Association pointed out that the trucking industry pays "48 times more in federal highway user fees than do cars, on top of the other roadway taxes, business taxes, and income taxes that motor carriers pay."⁴⁴ Given the disparity in taxes paid by car and truck users, preventing the imposition of truck-only taxes is the top strategy choice of 37.2 percent of respondents.

b) *Continue to advocate for long-term highway funding through an increase in the fuel tax or other direct user fees, and prevent additional diversion of revenue to non-highway projects.* The persistent shortfall of highway funding in the United States is due, in large part, to an erosion of federal motor fuels tax revenue. While Congress continues to debate how to fund transportation infrastructure, a recent ATRI analysis found that imposition of a federal VMT tax on all vehicles would cost 300 times more than the cost

⁴¹ "American Trucking Trends 2020." American Trucking Associations. Arlington, VA. 2020.

⁴² Arkansas Trucking Association. "I-40 Bridge Closure Estimated to Cost Trucking \$2.4M Per Day." ATA News in Brief. May 14, 2021. Available online: <https://www.arkansastrucking.com/newsinbrief/785-i-40-bridge-closure-estimated-to-cost-trucking-2-4m-per-day>

⁴³ Mulero, Eugene. "Industry Rejects Tax Proposal Targeting Trucks." Transport Topics. May 19, 2021. Available online: <https://www.ttnews.com/articles/ata-president-chris-spear-shoots-down-truck-only-vmt>

⁴⁴ Mulero, Eugene. "ATA, OOIDA Letter Strongly Opposes Cornyn's Trucks-Only VMT Idea." Transport Topics. May 26, 2021. Available online: <https://www.ttnews.com/articles/ata-oida-letter-strongly-opposes-cornyns-trucks-only-vmt-idea>

to collect the federal fuel tax.⁴⁵ Given the administrative efficiency of the fuel tax,⁴⁶ increasing the federal fuel tax to improve the nation's surface transportation infrastructure was the top strategy selected by 35.9 percent of respondents.

c) *Create a new funding program to focus federal resources on truck bottlenecks along major freight corridors.* Faced with limited resources to repair and maintain roads and bridges, a key solution to addressing the nation's transportation challenges is to direct funding to bottlenecks along major freight routes, a strategy that was selected by 23.8 percent of respondents. ATRI's annual list of top truck bottlenecks provides transportation planners at the federal and state levels with an empirical data-based resource for prioritizing transportation investments utilizing GPS data from over 1 million freight trucks.⁴⁷

⁴⁵ Short, Jeffrey and Daniel Murray. "A Practical Analysis of a National VMT Tax System." American Transportation Research Institute. Arlington, VA. March 2021. <https://truckingresearch.org/2021/03/16/a-practical-analysis-of-a-national-vmt-tax-system/>

⁴⁶ Short, Jeffrey. "A Framework for Infrastructure Funding." American Transportation Research Institute. November 2017.

⁴⁷ "2020 Top 100 Truck Bottleneck List." American Transportation Research Institute. Arlington, VA. February 2020. Available online: <https://truckingresearch.org/2021/02/23/2021-top-truck-bottlenecks/>

9. Insurance Cost / Availability

Ranked 1 st 2.8%	Ranked 2 nd 4.9%	Ranked 3 rd 4.8%	Total Share 11.9%	Industry Concern Index 18.5
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Insurance Cost and Availability ranked as a top 10 issue overall in the inaugural survey (2005) and then did not make the overall top 10 until last year as the number five issue. This year, Insurance Cost and Availability is down four spots to number nine overall. ATRI's annual Operational Costs of Trucking documents the industry's commercial auto insurance premium costs per mile and in 2020, those costs were down 19 percent from the previous year.⁴⁸ Since insurance premium rates continued to increase, much of this carrier cost decrease is attributed to trucking fleets assuming higher risk levels through higher deductibles, self-insurance, expanding use of insurance captives, and lower levels of excess liability coverage.

Proposed Strategies (in rank order):

a) *Quantify the impact of rising insurance costs on industry operations, safety investments, and driver training.* ATRI's Nuclear Verdicts research documented some of the impacts of rising insurance costs, including reduced resources for driver training.⁴⁹ Additionally, ATRI's Research Advisory Committee⁵⁰ identified this topic – Impacts of Rising Insurance Costs on Industry Operational Costs – as a top research priority for 2020 and that analysis is expected to be released in early 2022. Understanding the impact of rising insurance costs is the top strategy selected by 52.8 percent of survey respondents.

b) *Examine the feasibility of an industry-wide insurance surcharge passed on to shippers.* Trucking fleets utilize fuel surcharges to guard against wildly fluctuating fuel costs that could easily wipe out operating margins. They also serve to provide shippers with more cost predictability. Given the dramatic and volatile rise in insurance costs, motor carriers can protect entire supply chains by better managing this cost volatility. Consequently, just over a fourth of respondents (27.8%) believe that a similar insurance surcharge for insurance cost fluctuations may be the best approach for managing this line item.

c) *Conduct cost-benefit analyses on raising minimum insurance levels.* Earlier this year, a bill was reintroduced to increase the federal minimum liability insurance requirement for motor carriers from \$750,000 to nearly \$5 million.⁵¹ In 2014, FMCSA issued an

⁴⁸ Murray, Daniel and Nathan Williams. "An Analysis of the Operational Costs of Trucking: 2020 Update." American Transportation Research Institute. Arlington, VA. November 2020. Available online:

<https://truckingresearch.org/2020/11/24/an-analysis-of-the-operational-costs-of-trucking-2020-update/>

⁴⁹ Murray, Daniel, Nathan Williams and Erin Speltz. "Understanding the Impact of Nuclear Verdicts on the Trucking Industry." American Transportation Research Institute. Arlington, VA. June 2020.

⁵⁰ ATRI's Research Advisory Committee is comprised of industry stakeholders representing motor carriers, trucking industry suppliers, labor and driver groups, law enforcement, federal government, and academics. The RAC is charged with annually recommending a research agenda for the Institute. For more information:

<https://truckingresearch.org/2021-2022-atr-research-advisory-committee/>

⁵¹ Brajkovic, Vesna. "Bill to Increase Carrier Insurance Reintroduced." HDT Truckinginfo.com. April 16, 2021.

Available online: <https://www.truckinginfo.com/10141478/bill-to-increase-minimum-insurance-for-carriers-reintroduced>

Advanced Notice of Proposed Rulemaking (ANPRM) on increasing insurance levels, but ultimately withdrew the proposal due to a lack of data needed to assess the increase. Understanding the costs and benefits of an increase in the minimum insurance levels is the preferred strategy of 15.4 percent of respondents.

10. Diesel Technician Shortage

Ranked 1 st 4.1%	Ranked 2 nd 3.6%	Ranked 3 rd 3.1%	Total Share 10.3%	Industry Concern Index 18.5
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This is the first year that the Diesel Technician Shortage has been ranked as a top-10 issue. However, five years ago it was first identified as an Emerging Issue for the industry.⁵² The U.S. Bureau of Labor Statistics estimates that there will be over 28,000 openings for diesel service technicians and mechanics for each of the next 10 years. Median pay for diesel technicians in 2020 was just over \$50,000.⁵³

Proposed Strategies (in rank order):

a) *Encourage collaboration between motor carriers and local community colleges/tech schools to promote technician training and placement.* The majority of respondents (55.6%) believe that the best approach for recruiting more diesel technicians is to encourage collaboration between motor carriers and technician training schools to promote technician training and placement. From offering scholarships to prospective students⁵⁴ to donating equipment to schools for training purposes,⁵⁵ these efforts are designed to address the increased demand for technicians.

b) *Conduct research to quantify the scope and cause of current technician shortages and develop best practices for technician recruitment and retention.* According to projections from TechForce Foundation, demand for new entrant diesel technicians will top 35,000 by 2024.⁵⁶ Understanding the scope of the shortage, the underlying challenges in identifying and recruiting new entrants, and best practices for overcoming those challenges is the preferred strategy of 27.6 percent of respondents.

c) *Work with the U.S. Department of Labor Veteran's Employment and Training Service to encourage interest among veterans in technician training.* 14.2 percent of respondents believe that the best strategy for recruiting diesel technicians is to focus the industry's efforts on military veterans, particularly those with experience working on military equipment. Collaboration between the U.S. Department of Labor Veteran's Employment and Training Service and the industry was the focus of a recent meeting

⁵² "Critical Issues in the Trucking Industry – 2017." American Transportation Research Institute. Arlington, VA. October 2017.

⁵³ U.S. Department of Labor Bureau of Labor Statistics. "Occupational Outlook Handbook, Diesel Service Technicians and Mechanics." Accessed on October 18, 2021. Available online: <https://www.bls.gov/ooh/installation-maintenance-and-repair/diesel-service-technicians-and-mechanics.htm>

⁵⁴ Brawner, Steve. "Scholarships Bring Opportunities to Students Looking for a Sustainable Career Path." Transport Topics. October 8, 2021. Available online: <https://www.ttnews.com/articles/scholarships-bring-opportunities-students-looking-sustainable-career-path>

⁵⁵ Navistar. "Navistar Launches Dealer-Aligned Equipment Donation Program to Further Enrich Technician Training." Press Release. June 8, 2020.

⁵⁶ "Transportation Technician Supply & Demand 2020 Report." TechForce Foundation. August 31, 2020. Available online: <https://techforce.org/techforce-releases-2020-technician-supply-demand-report/>

convened by the American Trucking Associations' Technology and Maintenance Council.⁵⁷

⁵⁷ Miller, Eric. "Looking to Hire a 'Fresh-Faced Veteran' Maintenance Tech? Good Luck." Transport Topics. April 15, 2021. Available online: <https://www.ttnews.com/articles/looking-hire-fresh-faced-veteran-maintenance-tech-good-luck>

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 1). This analysis can provide insight on the issues that may emerge in the future as a top industry issue.

Table 1: Issues 11 – 13

Rank	Issue	ICI
11	Driver Distraction	17.9
12	Fuel Prices	16.7
13	Economy	14.6

For the third year in a row, *Driver Distraction* fell just outside the Top 10 as the 11th ranked issue. According to the latest data from the National Highway Traffic Safety Administration (NHTSA), “nine percent of fatal crashes, 15 percent of injury crashes, and 15 percent of all police-reported motor vehicle traffic crashes in 2019 were reported as distraction-affected crashes.” Additionally, NHTSA reported that 3,142 people were killed and an estimated 424,000 people were injured in motor vehicle crashes involving distracted drivers.⁵⁸ Commercial drivers see the impacts of driver distraction daily and fleets report that their crash experience with distracted car drivers continues to rise.

The *price of fuel* was the top ranked issue in the inaugural Top Industry Issues Survey in 2005, shortly after Hurricane Katrina affected the Gulf fuel supply and drove prices up substantially. Fuel stayed on the industry’s top-10 list until it dropped off in 2014. After a pandemic-induced drop in fuel demand in 2020, and therefore prices, 2021 has seen a steady increase in fuel prices. Recent reports show that fuel has reached its highest price since 2014⁵⁹ and those increased fuel costs have the industry concerned, particularly small fleets and owner-operators.⁶⁰ This is also reflected in the fact that Fuel Prices is now the number one industry concern as ranked by owner-operator respondents in this year’s survey (Table 3).

The collective industry angst over inflation, supply chain disruptions, workforce challenges, and uncertainty over lingering or long-term impacts from the pandemic are likely combining to make the nation’s *Economy* the third of the Emerging Issues this year, ranking 13th overall.

⁵⁸ “Distracted Driving 2019.” U.S. Department of Transportation National Highway Traffic Safety Administration. April 2021.

⁵⁹ Lockridge, Deborah. “Diesel Prices Spike.” HDT Truckinginfo.com. October 14, 2021. Available online: <https://www.truckinginfo.com/10153938/diesel-prices>

⁶⁰ Heine, Max. “Independents worry fuel prices will keep rising.” Overdrive. April 16, 2021. Available online: <https://www.overdriveonline.com/business/article/15064976/independents-worry-fuel-prices-will-keep-rising>

Commercial Driver versus Motor Carrier Issue Rankings

The Top Industry Issues report details the results of the overall industry survey of industry stakeholders including employee drivers and owner-operators, motor carrier executives, and other trucking industry stakeholders. However, each of the stakeholder groups surveyed have different levels of involvement in, and 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 account for 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 2).

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

For the first time ever, the ranking of issues resulted in a tie for the top concerns ranked by commercial drivers. Driver Compensation and Truck Parking generated the same level of concern by driver respondents. Detention / Delay at Customer Facilities – another challenge experienced daily by commercial drivers – ranked second.

Table 2: Commercial Driver and Motor Carrier Issues

Rank	Commercial Drivers		Motor Carriers
1	Driver Compensation (tie)	Truck Parking (tie)	Driver Shortage
2	Detention / Delay at Customer Facilities		Driver Retention
3	Fuel Prices		Lawsuit Abuse Reform
4	Driver Training Standards		CSA
5	Hours-of-Service Rules		Driver Compensation
6	ELD Mandate		Insurance Cost/Availability
7	Driver Distraction		Diesel Technician Shortage
8	Transportation Infrastructure / Congestion / Funding		Transportation Infrastructure / Congestion / Funding
9	Speed Limiters		Driver Distraction
10	CSA		Detention / Delay at Customer Facilities

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

Table 3: Company Driver and Owner-Operator / Independent Contractor Issues

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

Table 4: Top Industry Issue Rankings, 2012 – 2021

	Issue Rank									
	1	2	3	4	5	6	7	8	9	10
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
2013	Hours-of-Service	CSA	Driver Shortage	Economy	ELD Mandate	Truck Parking	Driver Retention	Fuel Supply / Fuel Prices	Infrastructure / Congestion / Funding	Driver Health/Wellness
2012	CSA	Hours-of-Service	Economy	Driver Shortage	Fuel Supply / Fuel Prices	ELD Mandate	Driver Retention	Truck Parking	Driver Health / Wellness	Congestion / Truck Bottlenecks

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