

# Who's in the Driver's Seat?

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# ATRI

## Trucking industry's NFP research organization

- Safety
- Mobility
- Economic Analysis
- Technology
- Environment

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# 2016 Top Industry Issues

1. ELD Mandate
2. Hours-of-Service
3. Cumulative Economic Impact of Trucking Regulations
4. Truck Parking
5. Economy
6. CSA
7. Driver Shortage
8. Driver Retention
9. Transportation Infrastructure/ Congestion/ Funding
10. Driver Distraction

## CRITICAL ISSUES IN THE TRUCKING INDUSTRY – 2016



Presented to the  
American Trucking Associations

Prepared by  
The American Transportation Research Institute  
October 2016



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# Top Issues Drivers vs. Carriers

## Commercial Drivers

1. ELD Mandate
2. Hours-of-Service
3. Truck Parking
4. Cumulative Economic Impact of Trucking Regulations
5. Economy
6. CSA
7. Driver Retention
8. Sleep Apnea Rulemaking
9. FMCSA Mission
10. Driver Health/Wellness

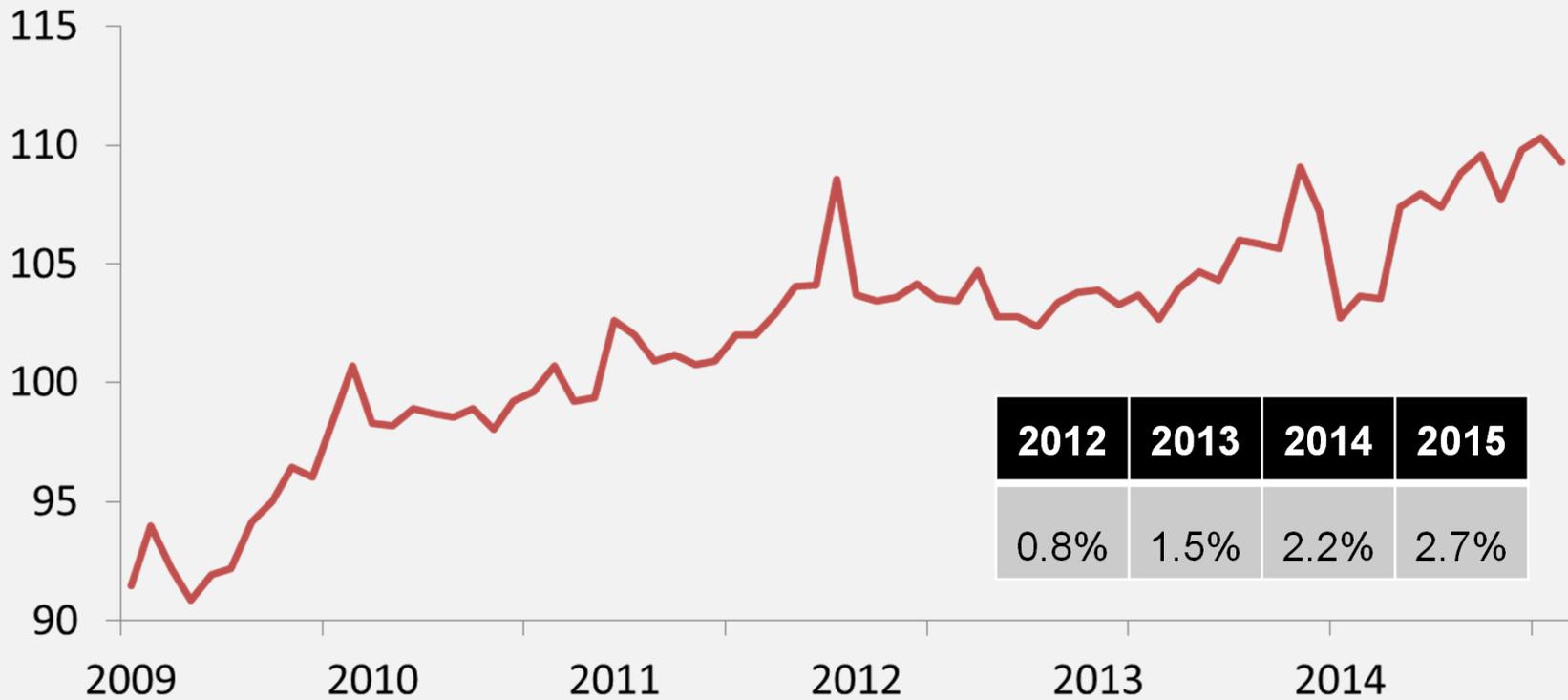
## Motor Carrier Execs

1. Driver Shortage
2. ELD Mandate
3. Cumulative Economic Impact of Trucking Regulations
4. Economy
5. Hours-of-Service
6. Driver Retention
7. CSA
8. Transportation Infrastructure/ Congestion/ Funding
9. Federal Preemption of State Regulation of Interstate Trucking (F4A)
10. Driver Distraction



# Truckload Industry Loads

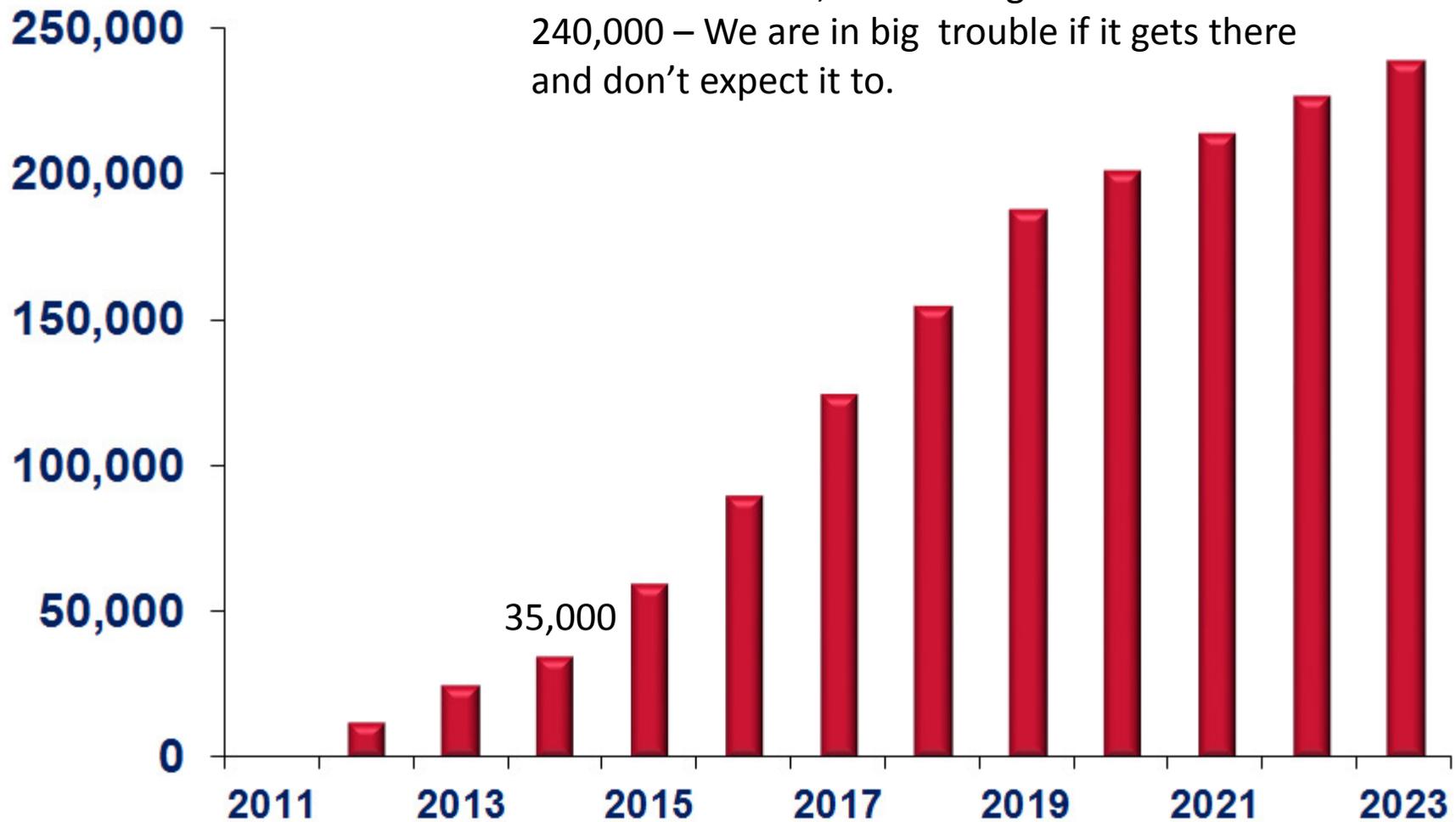
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Source: ATA

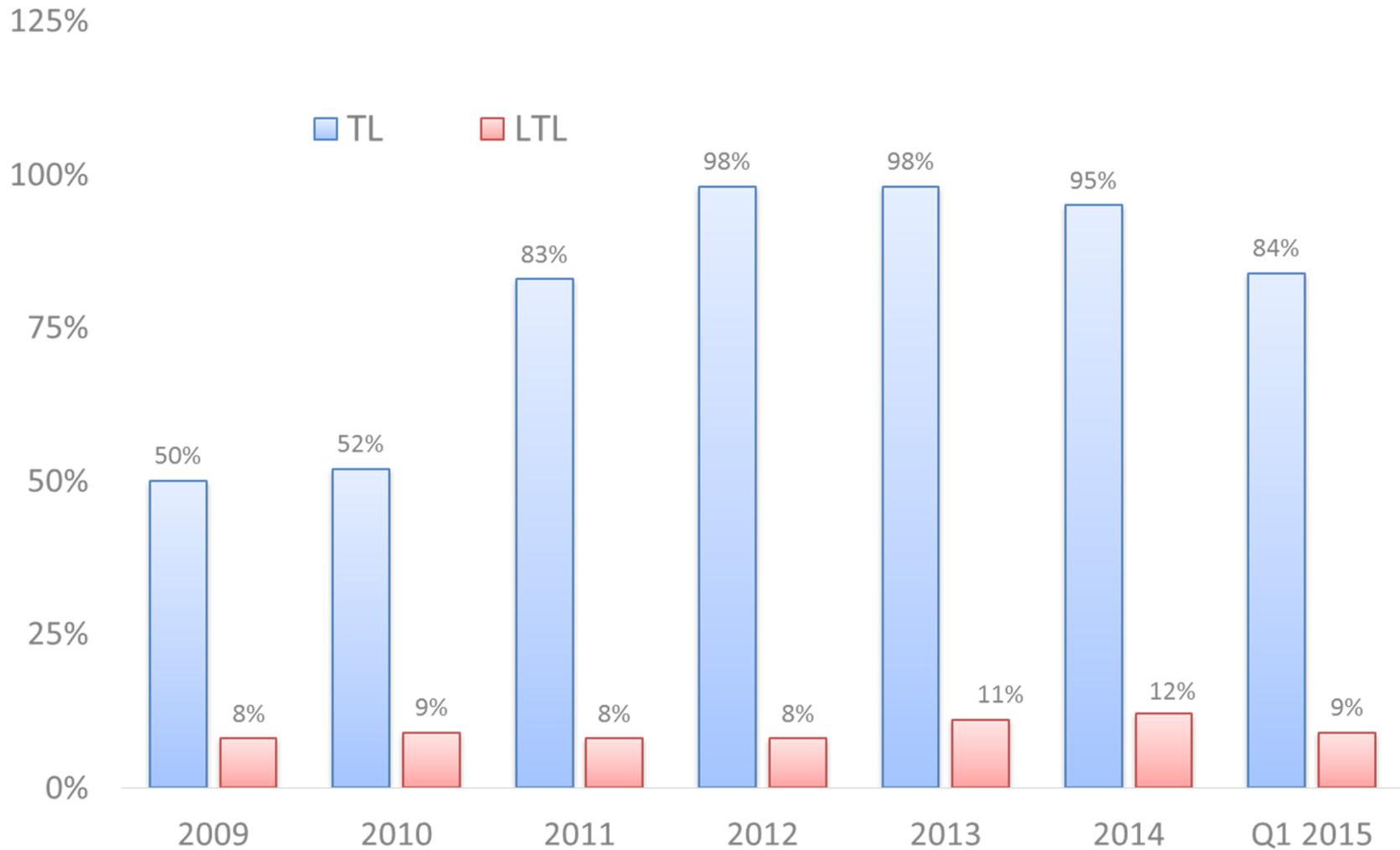
# DRIVER SHORTAGE

At current trends, the shortage could balloon to 240,000 – We are in big trouble if it gets there and don't expect it to.



Source: ATA

# Truck Driver Turnover Rates

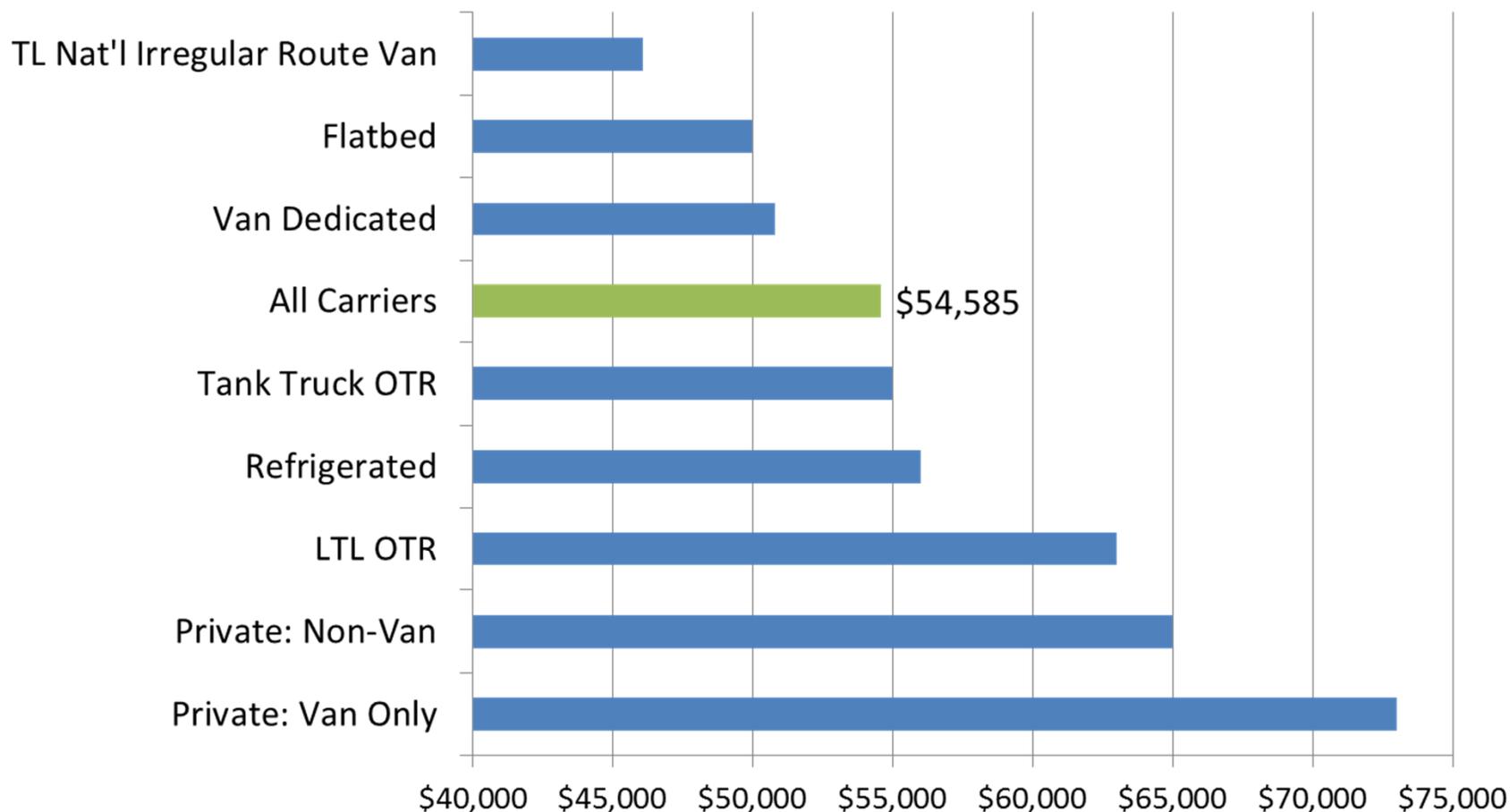


Source: ATA



# Annual Employee Driver Compensation

2013 Median Pay Including Incentives and Bonuses



\*Solo Drivers Only

Source: ATA's *Driver Compensation Study 2014*



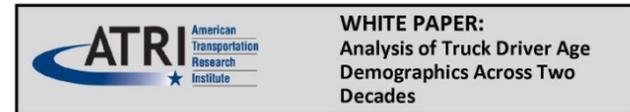
# Competing Costs – Small Margins

Motor Carrier Cost Type	2014 \$/1k Miles	Percent of Total
<i>Vehicle-based</i>		
Fuel Costs	\$583	34.2%
Truck/Trailer Lease/Purchase Payments	\$215	12.6%
Repair & Maintenance	\$158	9.3%
Truck Insurance Premiums	\$71	4.2%
Permits and Licenses	\$19	1.1%
Tires	\$44	2.6%
Tolls	\$23	1.4%
<i>Driver-based</i>		
Driver Wages	\$462	27.1%
Driver Benefits	\$129	7.6%
<b>TOTAL</b>	<b>\$1,703</b>	<b>100.0%</b>

Source: ATA

# Analysis of Truck Driver Age Demographics Across Two Decades

- Identified as a top RAC priority – 2013
- Released December 2014
- Analysis of U.S. Census Bureau data
- Examines demographic trends in driver workforce with implications for future

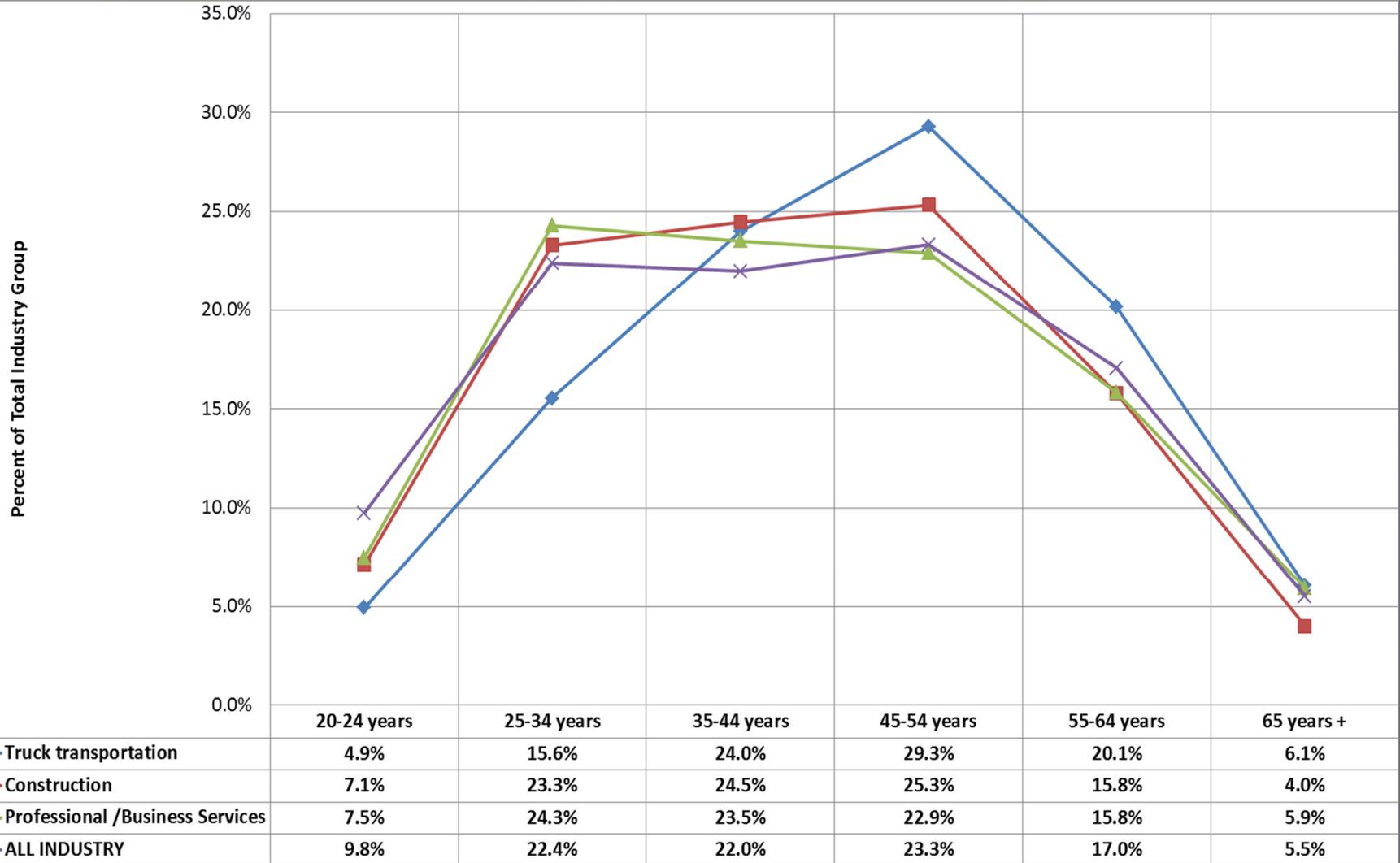


December 2014

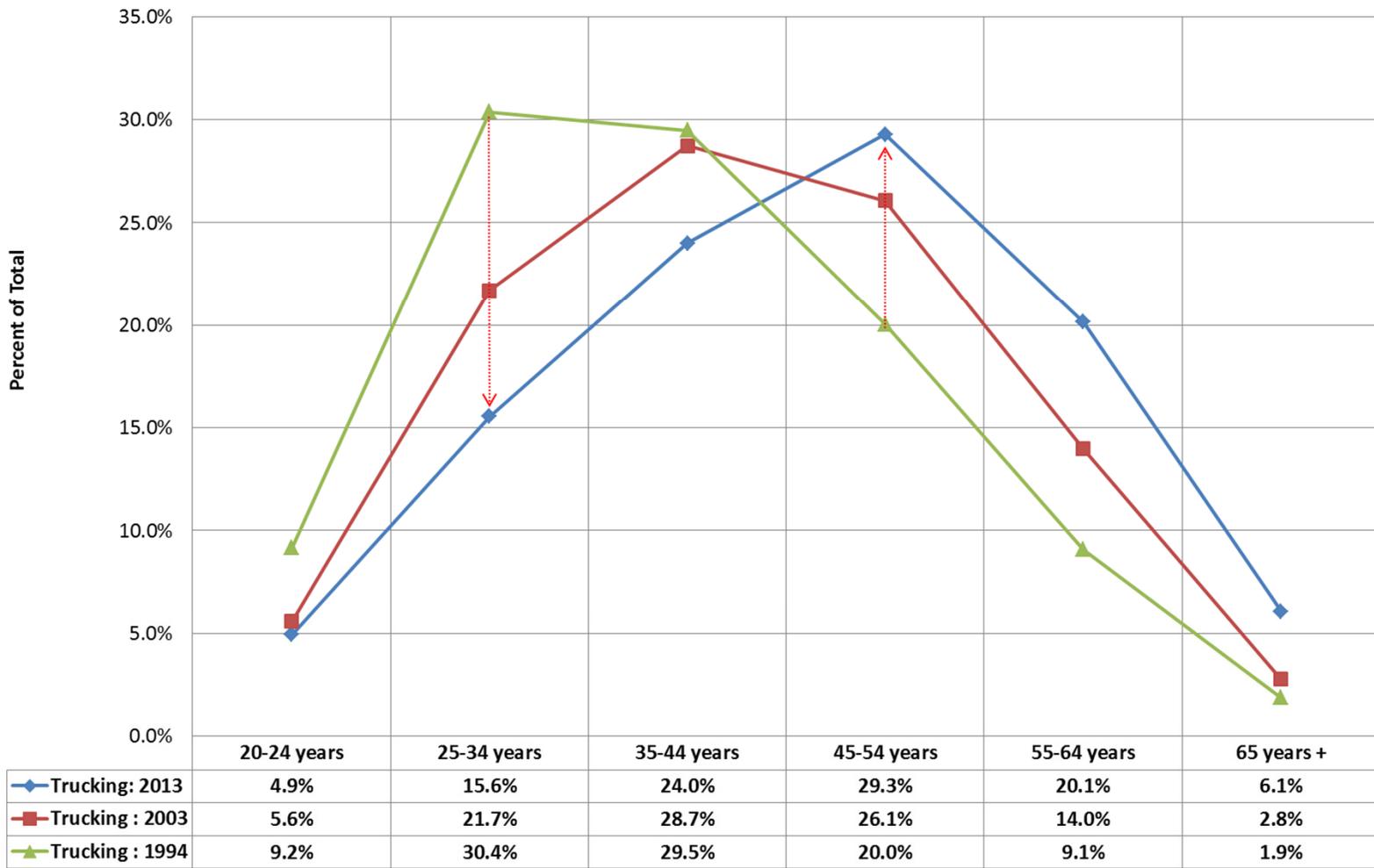
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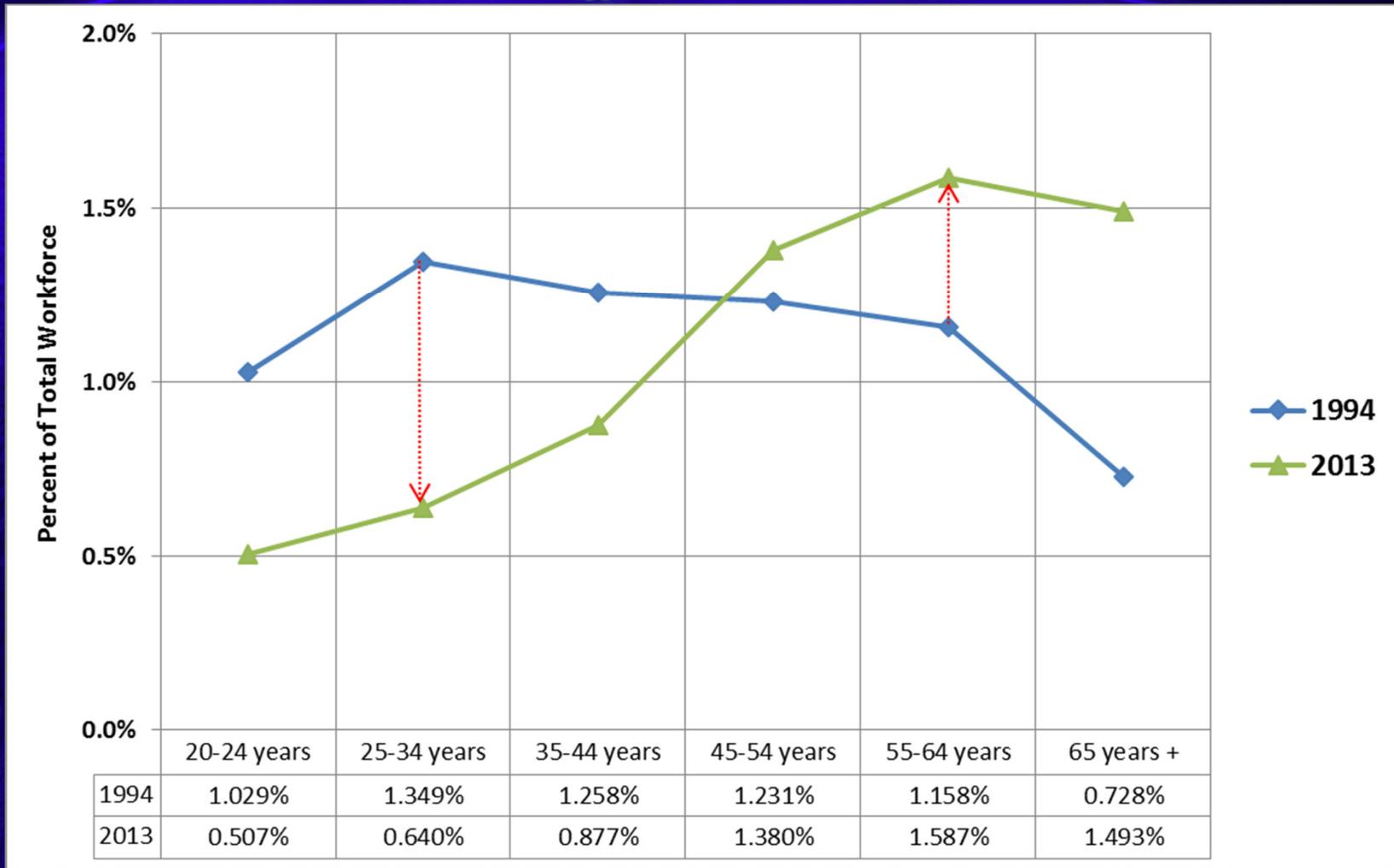
# Truck Driver Age Demographics



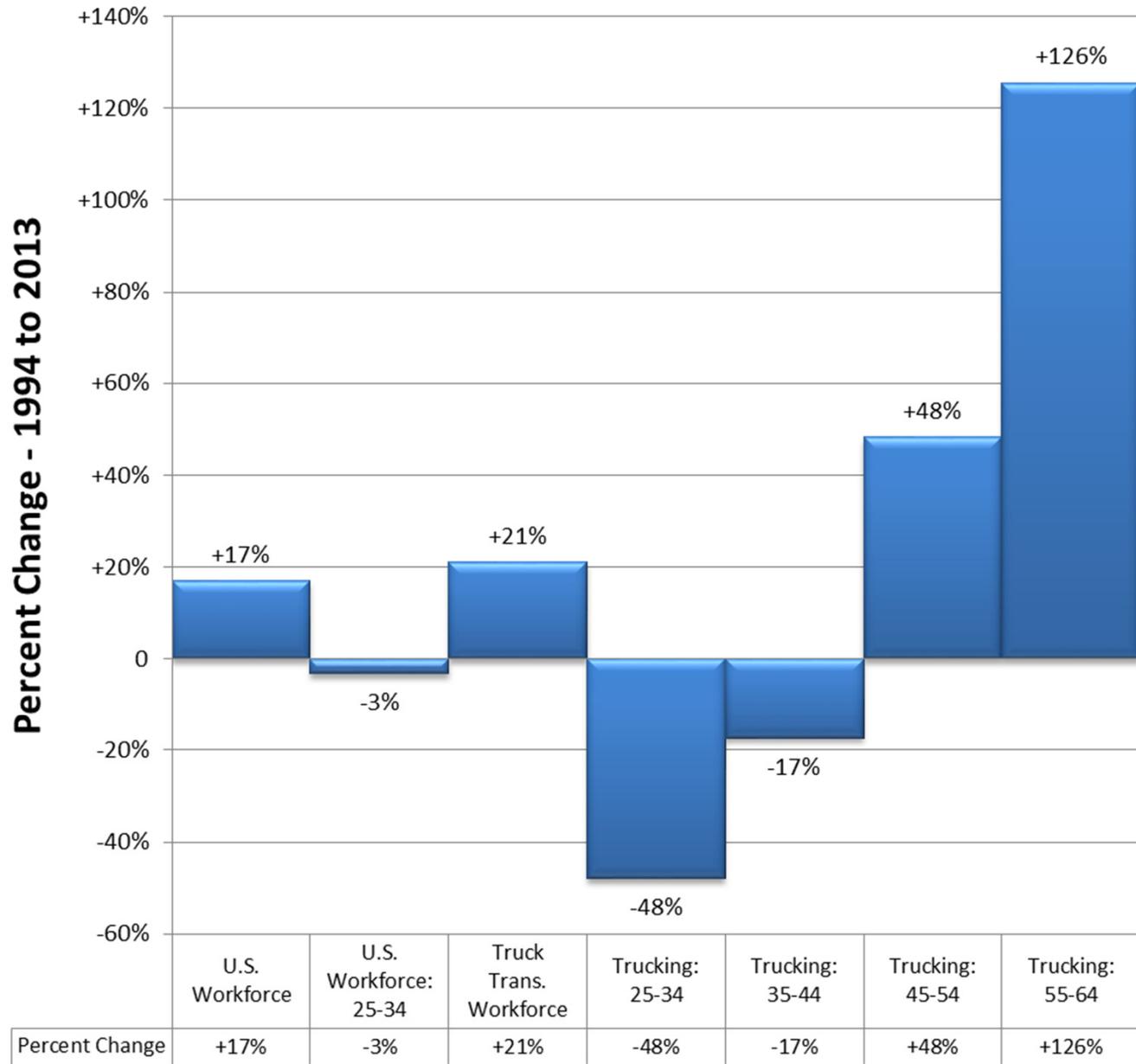
# Truck Driver Age Demographics



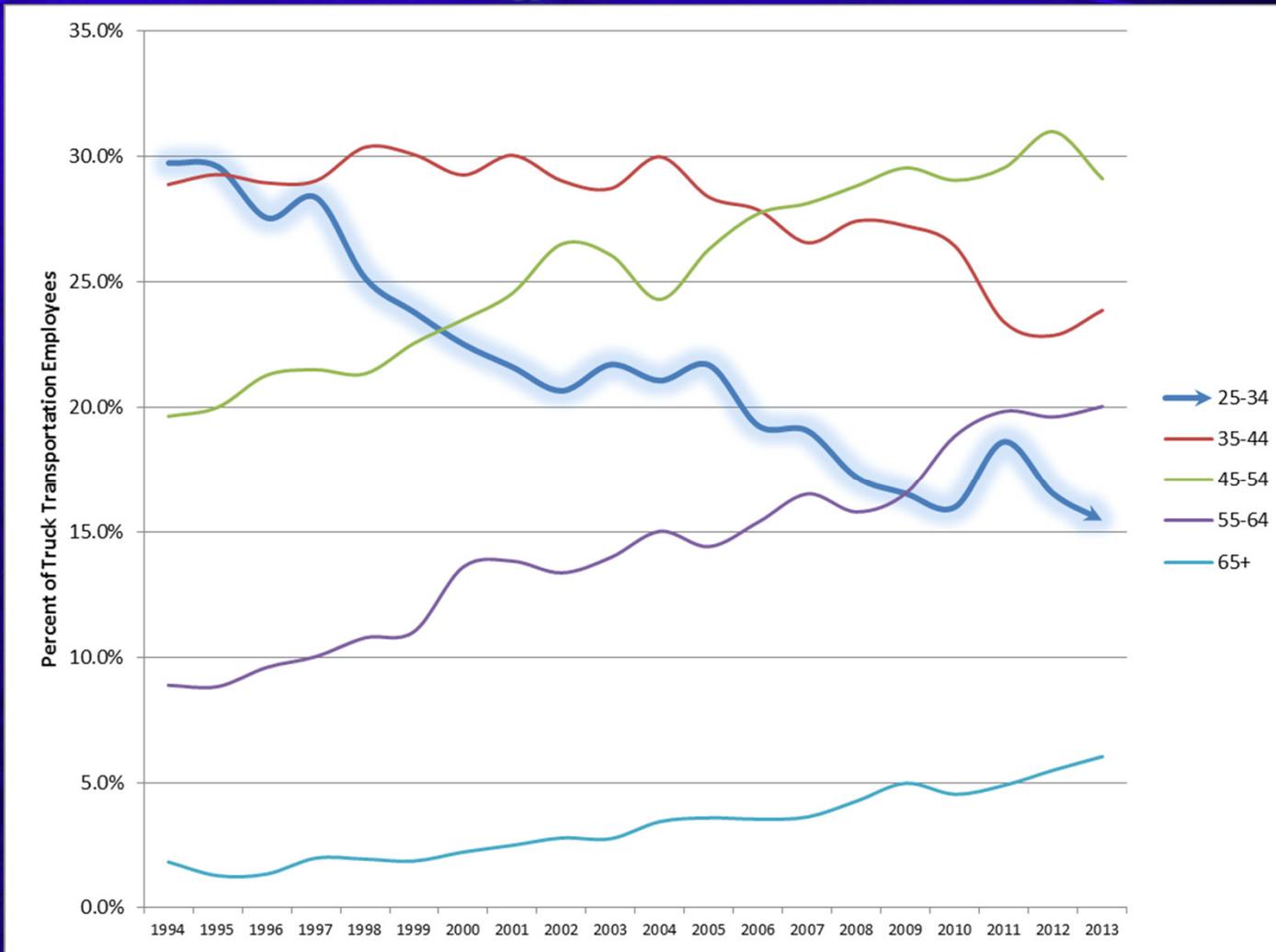
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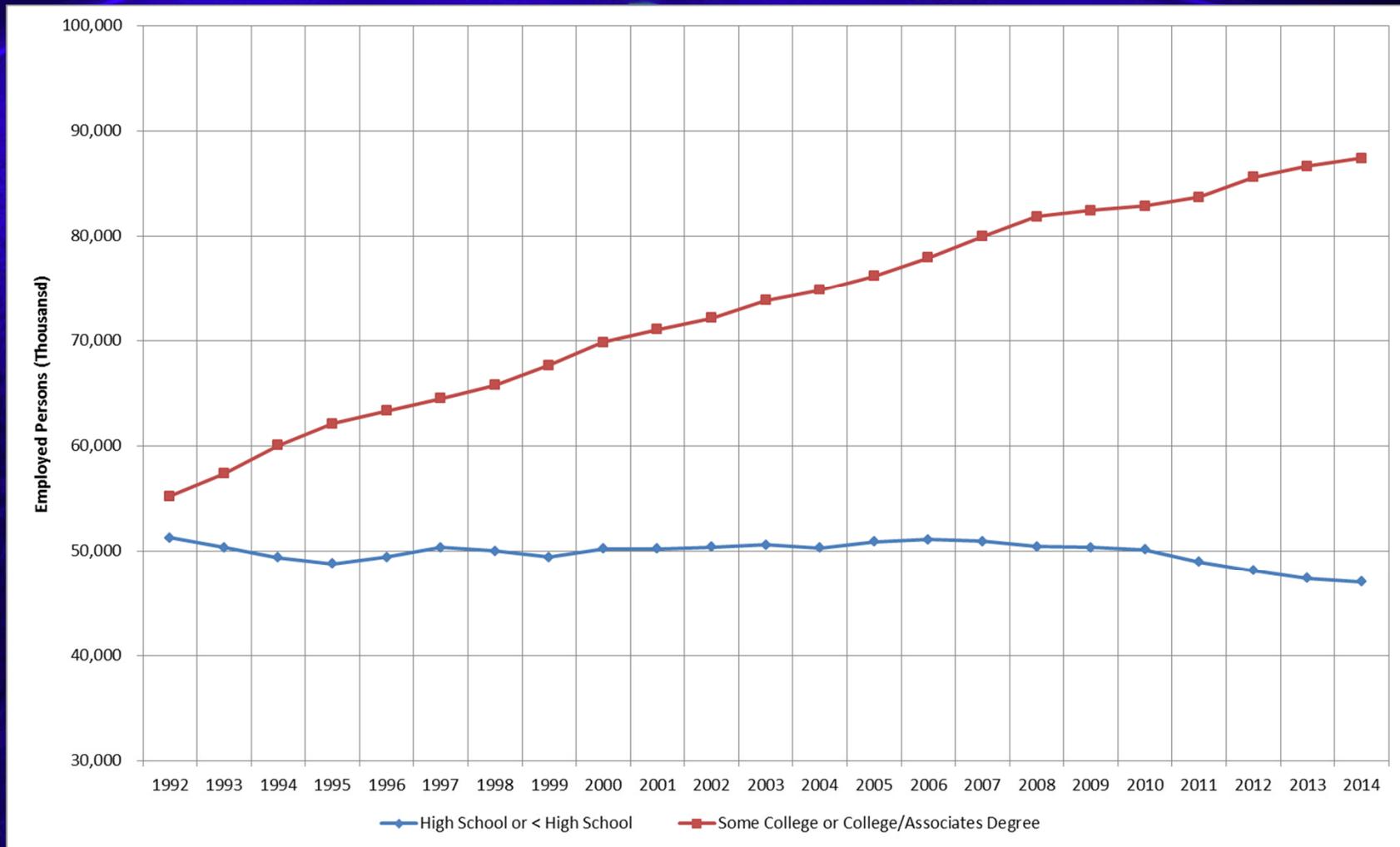
# Truck Driver Age Demographics



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# Truck Driver Age Demographics

Program Type	Public Schools Offering Program
Business	96.5%
Computer Technology	94.4%
Mechanics and Repair	81.9%
Precision Production	78.9%
Construction	73.5%
Childcare and Education	68.3%
Healthcare	64.9%
Agriculture	62.4%
Other Technology	58.3%
Marketing	57.9%
Food Service and Hospitality	57.4%
Communications and Technology	53.6%
Other Occupational Programs	48.2%
Personal and Other Services	48.0%
<b>Trade and Industry/Transportation</b>	<b>28.8%</b>
Protective Services	25.8%

# Approaches

- **Maintain current employee base**
- **Identify ways to encourage/foster vocational learning focused on trucking**
- **Bridge gap between high school and trucking career**
  - ◆ **Graduated CDL**
- **Military Heavy Vehicle Drivers**
- **Impact of Autonomous Technology**

# Autonomous Vehicles A Game Changer?

- **Three Levels of Technology**
  - ◆ **Level 3: Automated Driving with Attentive Driver**
  - ◆ **Level 4: Full Automation for Part of a Trip**
  - ◆ **Level 5: Full Automation for Entire Origin to Destination**

**Questions?**

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