

# CRITICAL ISSUES IN THE TRUCKING INDUSTRY – 2009



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## Critical Issues in the Trucking Industry – 2009

As the U.S. economy slowly recovers from the worst recession since the 1930s, the industry's long-term rebound is still challenged by recalcitrant consumer confidence, high unemployment and a credit crunch. Secondary and tertiary impacts include rare driver lay-offs, excess freight capacity and decreasing fuel costs. Nevertheless, the trucking industry is well accepted as a leading indicator or barometer of general economic health, and many core indicators reflect improving conditions over the last two quarters.

Difficult times aside, the industry remains a ubiquitous and highly resilient component of the nation's economy. Unlike other freight transportation modes, trucking is able to quickly adjust operations and costs accordingly. And, despite a shrinking economy through most of 2008 and 2009, the industry continued to carry the bulk of the nation's freight, totaling 69 percent of all freight tonnage in the U.S. in 2008<sup>1</sup>.

Reflecting the industry's dynamism and fluidity, motor carrier priorities and issues quickly change and reprioritize based on both short- and long-term externalities. Recognizing that an improved understanding of industry issues allows for more predictive analyses and investment planning, the American Trucking Associations commissioned the American Transportation Research Institute (ATRI) to conduct its fifth annual survey of critical issues facing the trucking industry. The ATRI Top Industry Issues Survey continues to serve as a unique and critical tool for industry and public sector decision-makers alike.

The Top Industry Issues survey is conducted in two phases. The initial "Phase One Survey" is designed to identify and categorize key issue areas and strategies from a large, representative sample of for-hire and private carriers. The Phase One Survey sample included several hundred carrier respondents, representing a cross-section of fleet sizes, industry sectors and geographic regions.

The "Phase Two Survey" was distributed to more than 4,000 carriers, with the objective of rank-ordering the relative importance of each issue and the preferred strategies identified through the Phase One survey initiative. Phase Two survey respondents (n=599) represent industry stakeholders from both the U.S. and Canada and include motor carriers, commercial drivers and other industry stakeholders.

This report presents the findings of the 2009 annual survey and analysis, and further juxtaposes previous years' survey findings as a simple indicator of changing priorities in the trucking industry.

The top two issues identified by the industry in 2009 are the Economy and Government Regulation. This year's top issue, the Economy debuted last year as the 2<sup>nd</sup> most important issue facing the industry.

The top ten list is developed through a formula that assigns values to respondents' rankings of the issues facing the industry. Values are also assigned to respondents' rankings for each of the three strategies identified as potential solutions for addressing each issue. In rank order, the top ten issues identified by industry respondents are detailed below.

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<sup>1</sup> ATA. *U.S. Freight Transportation Forecast to...2020*. Arlington, VA.

## 1. Economy

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3 <sup>rd</sup>	Total Score
51.6%	14.4%	8.8%	5,022

Last year's debut of the economy as the second most pressing issue facing the industry was clearly a bellwether of events to come. In 2009, approximately 52 percent of respondents ranked this issue 1<sup>st</sup>. Economists hypothesize that, unlike previous recoveries, freight volumes will not lead the way out of this recession. Experts attribute this to the fact that demand for goods has declined much more rapidly than in previous recessions and that existing supplies of both raw and manufactured goods remain high<sup>2</sup>. In addition, the overall capacity of the industry remains relatively high which ensures that extreme competition and downward pricing pressures remain for some time after positive GDP growth is realized.

### Proposed Strategies:

a) *Promote tort reform and other initiatives that reduce carrier operating costs.* After falling to ninth place in the 2008 Top Industry Issues Survey, tort reform was again over-shadowed by other issues and for the first time not identified as a stand-alone issue in 2009. However, tort reform is still identified as a key strategy for reducing carrier operating costs. 52 percent ranked this strategy 1<sup>st</sup>.

b) *Actively engage in the healthcare reform debate to support policies that control costs for employers.* Similar to last year, policies that control healthcare costs were ranked as the 2<sup>nd</sup> most important strategy for mitigating costs, which continue to outpace the overall inflation rate. As the healthcare reform debate continues, the industry is wary of proposals that include solutions paid for with new and variable business taxes.

c) *Pursue federal stimulus funds for freight transportation initiatives.* Though current economic conditions have temporarily reduced vehicle miles traveled and overall freight volumes, respondents recognize that the limitations and deficiencies of the U.S. freight transportation system remain unsolved. Many experts note that it is an opportune time to leverage federal stimulus funding for capacity and mobility improvements – in advance of the expected increase in freight volumes, trucking activity and growing vehicle congestion.

## 2. Government Regulation

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3 <sup>rd</sup>	Total Score
13.7%	14.7%	16.2%	4,097

Government regulation continued its climb up the list to 2<sup>nd</sup> place. This year's ascension of government regulation could be attributed to the changes in the national political landscape and election results at the federal, state and local levels. Many industry stakeholders anticipate a new era of costly government mandates. Though interstate motor carriers are primarily regulated by the U.S. Department of Transportation, a myriad of local, state and federal regulations are increasingly imposed on the industry, with the requisite, escalating costs of compliance.

<sup>2</sup> ATA. *Trucking Economic Review*, Volume 11, Issue 1. Arlington, VA.

Proposed Strategies:

- a) *Continue public outreach efforts that highlight the potential negative business impacts associated with the Employee Free Choice Act (Card Check).* Nearly half (47%) of respondents ranked this as the top strategy for dealing with the impacts of potential regulation. Critics of this legislation argue that Card Check will disrupt normal business operations and possibly lead to public intimidation of those employees that vote against organizing a union. Carriers indicate that the debate over the Card Check legislation should include these and other negative impacts on businesses.
  
- b) *Identify low-cost functional solutions to government mandates.* During challenging economic times, the industry is particularly hard-pressed to absorb new costs associated with unfunded mandates. Cited examples include new EPA engine emission standards and equipment aerodynamic standards mandated by the State of California. These examples of unfunded government mandates can dramatically increase vehicle/asset costs on an already escalating industry cost center<sup>3</sup>. Respondents proposed identifying and/or developing a range of low-cost alternatives that meet the mandate requirements more cost-effectively.
  
- c) *Support efforts to maintain and clarify the current status of owner-operators/independent contractors.* Also ranked a top three strategy in 2008, carriers consider retaining and clarifying the status of these drivers a key component in the industry’s continued ability to provide reliable and cost-effective freight transportation. Stakeholders argue that actions taken by the Internal Revenue Service and several states to reclassify these workers as employees threatens the viability of motor carriers that rely on independent contractors.

**3. Fuel Issues**

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3 <sup>rd</sup>	Total Score
5.5%	21.8%	16.3%	3,826

Reflecting the ongoing volatility of energy prices, “fuel issues” ranked 1<sup>st</sup> in 2005 and again in 2008, but dropped to 3<sup>rd</sup> in 2009. Nevertheless, fuel has remained as a top-three issue for the 5<sup>th</sup> consecutive year. In 2009, fuel issues garnered the highest percentage of votes as the 2<sup>nd</sup> biggest issue facing the industry (21.8%). After peaking at more than \$4.70 gallon in July 2008, the national diesel fuel average had declined 45 percent by September 2009<sup>4</sup>. Beyond the direct cost of fuel consumption, fuel price spikes and price variability create additional indirect financial challenges for motor carriers by raising the cost of petroleum-based products such as lubricants and tires. Trucking firm respondents indicate that recent fuel price declines are likely temporary; once the economy picks up, fuel demand will likely create upward pressure on fuel costs.

Proposed Strategies:

- a) *Examine the root causes of fuel price volatility and identify solutions that can offer price stability.* After last year’s increase in fuel prices, Congressional

<sup>3</sup> ATRI. *An Analysis of the Operational Costs of Trucking*. December, 2008. Arlington, VA.

<sup>4</sup> Department of Energy, Energy Information Administration. Accessed September 25, 2009. <http://tonto.eia.doe.gov/oog/info/gdu/gasdiesel.asp>

members, consumer watchdog groups and industry trade associations issued calls for investigations of price-fixing, energy speculation and futures trading. Driving this is the widely-held belief that market speculators, versus traditional supply and demand forces, artificially drove energy prices up, leading to myriad other economic consequences. If the causes and solutions for fuel price volatility are not developed and applied, respondents noted that similar economic crises are likely in the future. 45 percent of respondents ranked this strategy 1<sup>st</sup>.

b) *Continue to advocate for public policies that encourage the expanded exploration and production of domestic oil supplies.* Echoing 2008 perspectives, respondents consider increased domestic oil exploration and production key to long-term cost-effective and reliable energy supplies. As one of the top three marginal cost centers for carriers, the industry is heavily reliant on readily available fuel supplies and price stability.

c) *Pursue initiatives that conserve fuel and support the increased use of alternative energy forms.* Although the industry continues to examine the return-on-investment for numerous devices and technologies purported to reduce fuel consumption, it continues to lend strong conceptual support for fuel conservation initiatives and the expanded use of certain alternative forms of energy. Support for these initiatives is likely rooted in the reality that conserving fuel helps minimize one of the industry's top expenses and that increasingly stringent emission requirements will require the use of other forms of energy.

#### 4. Congestion/Highway Infrastructure

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3 <sup>rd</sup>	Total Score
6.2%	11.5%	16.7%	3,627

Despite significant drops in both truck and automobile vehicle miles traveled in 2008, congestion/highway infrastructure went up to 4<sup>th</sup> place from its previous 6<sup>th</sup> place position in 2008. The underlying factors behind this issue are becoming more prevalent; ongoing congestion impacts, deteriorating highway infrastructure and increasing interest in dedicated truck lanes and higher-productivity trucks have all worked together to put this issue at its highest level to date.

##### Proposed Strategies:

a) *Focus funding on addressing the most critical highway freight bottlenecks.* 38 percent of respondents selected this as the top strategy. As transportation system funding becomes increasingly scarce, respondents indicate the need to target limited resources on those transportation bottlenecks that most hinder freight mobility. The impact of delay on these freight chokepoints is documented by the FHWA/ATRI "Freight Performance Measures" initiative.

b) *Continue to educate and inform decision-makers at all levels of government on both the negative impacts of congestion and the deteriorating state of the U.S. transportation system.* There is mounting evidence that traffic congestion and deteriorating infrastructure are creating larger secondary societal costs relating to safety, air quality and energy consumption. However, transportation system operators and planners may not be adequately familiar with recent information and resources that identify or model outcomes associated with different planning

and programming activities – particularly those related to trucking. A concerted and comprehensive program to educate decision-makers can improve transportation planning and investment.

*c) Develop a national freight strategy and promote the economic, environmental and quality of life benefits of a more efficient freight transportation system.* State and local freight planning initiatives continue to proliferate across the country as stakeholders recognize that efficient goods movement positively supports multiple economic and quality-of-life objectives. While several regional freight planning initiatives have proven effective, the industry believes that increasingly complex supply chains, many with international components, require a national freight strategy blueprint that favors, and rationalizes, investment in critical freight nodes, links and facilities over a disconnected patchwork of stand-alone facilities.

### 5. Hours-of-Service

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3 <sup>rd</sup>	Total Score
6.8%	8.8%	8.4%	3,267

Rules regulating commercial driver Hours-of-Service (HOS) remain in the 5<sup>th</sup> spot in 2009. HOS has been an issue in the top ten since 2005 and peaked as the number one issue in 2007. As Congress delays voting on the next transportation reauthorization bill (and possibly revisiting the HOS debate), the industry clearly remains concerned over possible revisions to HOS provisions. Given the costs incurred by the industry in adapting operations to several HOS rules changes since 2005, the industry is closely monitoring HOS and related EOBR issues. Seven percent of respondents ranked this as the top issue.

#### Proposed Strategies:

- a) *Expand research and data collection on the safety impacts of HOS regulations.* This top strategy to better document HOS safety impacts through analytical research supplanted last year’s top HOS strategy of maintaining the 11- and 34-hour operating provisions. Closely related to fatigue management research, the industry desires better scientific information on the relationship of HOS and fatigue to safety outcomes. 31 percent of respondents ranked this as the top strategy.
  
- b) *Preserve current HOS exemptions in the highway funding reauthorization bill.* Respondents indicate that there is a need to maintain the current HOS exemptions which recognize the unique operating environment of certain sectors of the industry. Carriers operating in those sectors indicate that a loss of those exemptions would negatively impact their continued viability.
  
- c) *Expand research on causes and management strategies associated with truck driver fatigue.* Carriers continue to seek scientific understanding of the underlying causes of truck driver fatigue and the appropriate management strategies that derive from particular causes. With significant amounts of research underway on sleep disorders, sleep patterns and fatigue countermeasures, industry stakeholders are eager to bring the research results to bear in a more customized approach to individual driver fatigue management.

## 6. Commercial Driver Issues

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3rd	Total Score
8.3%	6.6%	9.3%	3,118

After maintaining a top-three ranking for four straight years, driver-related issues slipped to 6<sup>th</sup> place in 2009. Historically, the classic shortage of truck drivers has kept “Driver Issues” near the top of the list. In 2009, however, the economic recession basically eliminated driver shortages; in fact, many carriers either cut driver wages, or laid drivers off altogether.

During this same time period, carriers scaled back or eliminated entry-level driver training and/or hiring. Several carriers also viewed the period as an opportunity to eliminate employee drivers with less than stellar safety records. Reflecting the scope of the economic downturn, the construction industry, a leading industry competitor for truck drivers, experienced a similar collapse in the need for new workers.

### Proposed Strategies:

a) *Redesign and streamline current driver credentialing processes and requirements.* As highlighted in the 2008 Top Industry Issues report, driver credentialing mandates that propose to improve transportation security continue to challenge both the industry and the larger supply chain with duplicative programs, driver background checks and the related costs. The impact is considerable increases in administrative work, labor inefficiencies and occasional processing delays at ports and border-crossings<sup>5</sup>. 36 percent of respondents ranked this strategy 1<sup>st</sup>.

b) *Push for implementation of a national drug/alcohol testing database for drivers.* Narrowly missing the top strategy for the driver issue, and reflecting the industry’s overall need for streamlining and centralizing compliance programs and activities, respondents included a new strategy in 2009; the creation of a centralized national drug and alcohol testing database for commercial drivers. A national clearinghouse would provide carriers with a one-stop shop for ensuring that new driver hires have not exploited loopholes in federal employment laws and testing standards. Recently a bill was introduced in the U.S. Senate to create such a clearinghouse for drivers that either test positive for drugs/alcohol or refuse to take a drug/alcohol test.

c) *Enhance new entrant driver quality by promoting research and funding of more effective driver training programs.* Research shows that strategically designed driver training programs produce safer, more satisfied drivers. These programs and curricula leverage research that emphasizes critical content over total time/duration<sup>6</sup>. While the 2007 FMCSA Notice of Proposed Rulemaking (NPRM) detailed minimum training hours for new entrant drivers, respondents indicate

<sup>5</sup> For example, some drivers may be required to obtain as many as three security-related credentials including a hazardous materials endorsement, a Free and Secure Trade (FAST) credential and a Transportation Worker Identification Credential (TWIC) card.

<sup>6</sup> ATRI. *A Technical Analysis of Driver Training Impacts on Safety*. Arlington, VA.

that new entrant driver training requirements should be based on performance outcomes rather than on contact hour requirements.

## 7. Environmental Issues

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3 <sup>rd</sup>	Total Score
4.6%	8.9%	7.4%	2,801

Environmental issues climbed from 8<sup>th</sup> in 2008 to 7<sup>th</sup> this year, attaining its highest ranking in five years. The proliferation of anti-idling regulations, federal and state equipment mandates, and the ongoing debate on carbon taxing and cap and trade legislation has created concern that compliance costs may significantly exceed benefits. The plethora of regulations/proposals seeking to reduce emissions and greenhouse gases makes it likely that environmental issues and industry concerns will mount over the next few years. An anecdotal indicator of the industry’s sensitivity to environmental issues is the total number of “hits” on the ATRI’s online compendium of state and local idling regulations – which exceeds 17,500 annually<sup>7</sup>.

### Proposed Strategies:

a) *Advocate for credible cost/benefit analyses of environmental regulations and encourage the use of scientific evidence in the development of future regulations.* 47 percent of respondents ranked this strategy 1<sup>st</sup>. This strategy supplanted “new technology tax credits” – which had been the top strategy in both 2007 and 2008. Carriers conveyed an overall hesitation to support initiatives that likely mean incurring new costs in the current economic environment, particularly when the return-on-investment and overall program costs are unclear. Consequently, the industry continues to support the use of analytical tools and scientific protocol to ensure that new regulations produce quantifiable benefits exceeding potential significant costs.

b) *Pursue a national standard for truck emissions as an alternative to current cap and trade initiatives.* The industry continues to show support for clean air initiatives that do not impose excessive administrative burdens and compliance costs on the industry. The industry’s preferred solution to a multitude of different and complex cap and trade programs is a single, nationwide program that sets national standards for emission levels.

c) *Develop strategies to increase industry awareness of and participation in voluntary environmental programs.* After debuting last year as a top environmental issues strategy, voluntary industry efforts that support sustainability initiatives continue to be recognized as critical to demonstrating the industry’s willingness to support improved air quality, reduced emissions and improved fuel economy. Examples of these efforts include ATA’s six point program, *Trucks Deliver a Cleaner Tomorrow* and the EPA’s *Smartway Transport Partnership*.

<sup>7</sup> The compendium and cab card can be accessed at:  
[http://www.atri-online.org/index.php?option=com\\_content&view=article&id=164&Itemid=70](http://www.atri-online.org/index.php?option=com_content&view=article&id=164&Itemid=70)

## 8. Tolls/Highway Funding

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3 <sup>rd</sup>	Total Score
2.4%	6.3%	7.7%	2,601

Tolls and highway funding concerns fell one place in 2009 to 8<sup>th</sup>. Tolls/highway funding issues stayed in the limelight this year through headlines and debates on state and federal transportation funding shortfalls and new programs for raising revenue, including GPS-based mileage taxes. In addition, the lessor of the Indiana Toll Road and Chicago Skyway devalued those facilities between 80 to 300 percent – raising serious questions on the future value of “privatizing” public roads.

As state budgetary shortfalls reach near epic proportions, many in the industry fear renewed efforts to divert highway user fees to subsidize non-roadway programs. The industry is equally concerned that government budget shortfalls will prompt states to opt for raising needed revenues through inefficient mechanisms such as privatization of public roads, increased use of tolling or developing satellite-based mileage fees. Research has shown these arrangements typically reduce the amount of revenue that is returned to the system for improvements<sup>8</sup>.

### Proposed Strategies:

a) *Actively pursue policies that dedicate the use of highway trust funds for highway uses only.* Echoing the last two years, respondents ranked the exclusive use of highway trust fund receipts for roadway maintenance and capacity improvements as the top strategy for mitigating highway funding issues. For many years, there has been debate over the diversion of highway trust fund revenue to other programs such as environmental clean-up and transit, but the present U.S. economic state appears to make the issue more contentious. This strategy garnered the most 1<sup>st</sup> place votes (an overwhelming 74%) of any strategy for any issue in the 2009 study.

b) *Publicize the transportation benefits of traditional funding mechanisms over the use of creative financing strategies, such as tolls and public-private partnerships.* Research has shown that the use of fuel taxes is an extremely efficient means of returning highway user revenue back into the highway system<sup>9</sup>. However, many decision-makers are unaware that tolling and other creative financing tools return a significantly smaller proportion of user fees back into facility maintenance and improvements.

c) *Advocate for increased fuel taxes to fund dedicated highway improvements and reduce congestion.* Despite the dramatic increase in fuel costs in 2008 and precipitous drops in both freight volumes and revenues, the industry continues to favor fuel taxes as a more predictable and stable cost-center. Any fuel tax increases must be accompanied by statutory language that dedicates these revenues exclusively to roadway improvements.

<sup>8</sup> ATRI. *Defining the Legacy for Users: Understanding Strategies and Implications for Highway Funding*. May 2007.

<sup>9</sup> Ibid.

## 9. Truck Size and Weight

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3 <sup>rd</sup>	Total Score
2.7%	5.4%	2.7%	2,342

For the first time, “size and weight” ranks as a top ten issue facing the industry. In previous years, size and weight issues were seen as a potential solution to the ever-growing congestion problem. There is new interest by the industry, shippers and many environmentalists to revise size and weight limitations imposed by the federal government in 1991 as a mechanism for improving freight efficiency. A longer combination vehicle (LCV) pilot test in Ontario, Canada, as well as a recent proposal in Maine to increase truck weights are two recent signs that many are anxious to realize the potential benefits of expanded use of higher productivity vehicles.

### Proposed Strategies:

- a) *Support state-level efforts to standardize combination vehicle size and gross vehicle weight limits.* Prior to the LCV freeze, states were given more latitude to determine size and weight limits. After the LCV freeze was imposed, states were prohibited from revising and aligning these regulations, resulting in a disconnection between vehicle size and weight regulations among neighboring states. A sizable segment of the industry argues that a lack of uniform vehicle size and weight mandates creates confusion and makes compliance difficult and costly. 46 percent of respondents ranked this strategy 1<sup>st</sup>.
  
- b) *Encourage size and weight provisions that maximize productivity.* As stakeholders seek to reduce congestion, improve safety and minimize truck emissions, the industry supports size and weight provisions that maximize productivity by either increasing gross vehicle weights or the maximum length of combination vehicles. 34 percent of respondents ranked this strategy 1<sup>st</sup>.
  
- c) *Educate the public on the economic, safety and environmental benefits of higher productivity vehicles.* Before an informed debate regarding size and weight revisions can occur, the industry must ensure that decision-makers and the general public alike understand the real-world benefits and operating history of LCVs. For example, many outside the industry are unaware that a growing body of evidence has found that LCVs have superior safety records. 23 percent of respondents ranked this strategy 1<sup>st</sup>.

## 10. Onboard Truck Technology

Ranked 1 <sup>st</sup>	Ranked 2 <sup>nd</sup>	Ranked 3 <sup>rd</sup>	Total Score
1.4%	3.4%	6.6%	2,229

After first surfacing in 2007 as a top ten issue, Onboard Truck Technology continues to remain as the 10<sup>th</sup> most pressing issue in the industry. In 2009, both the U.S and Canadian governments continued their ongoing assessments on the role of certain onboard truck technologies, namely Electronic Onboard Recorders (EOBRs), which could be mandated in the future for certain segments of the industry. In addition, there is growing support for the mandated use of EOBRs for carriers with poor safety ratings. EOBRs can help monitor HOS compliance while other onboard technologies can warn

drivers of impending dangers (for example, collision warning or lane departure warning systems). Debate continues on the role and efficacy of speed limiters and other technologies that attempt to reduce large-truck crashes.

Proposed Strategies:

- a) *Pursue tax incentives to help offset the capital costs of onboard safety systems.* Echoing 2008 sentiments, this was identified as the top truck technology strategy with 50 percent of respondents ranking this strategy 1<sup>st</sup>. Though many questions remain about the use, associated record-keeping and costs of these technologies, clearly the industry is a proponent of technologies that can improve overall industry safety. However, as with any technology, the capital and maintenance costs prohibit many carriers from considering or deploying these systems. Financial incentives would likely encourage adoption of these technologies by a broader segment of the industry.
  
- b) *Support increased deployment of onboard safety systems with proven safety benefits and positive industry return-on-investment (ROI).* Objective data and analysis demonstrating safety benefits and positive return-on-investment is a critical component of a carrier's onboard safety system investment decision-making process. Where research indicates that onboard safety systems can meet carrier safety and financial objectives<sup>10</sup> the industry will be more likely to embrace widespread deployment of these systems. 31 percent of respondents ranked this strategy 1<sup>st</sup>.
  
- c) *Formulate industry consensus for use of Electronic Onboard Recorders (EOBRs) for HOS compliance.* Inclusion of this new strategy into the top three illustrates the industry's evolving acceptance of EOBRs as a potential beneficial technology. However, concerns remain on quantifying real-world economic and safety benefits for the different operating segments of the industry.

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<sup>10</sup> ATRI. Analysis of Benefits and Costs of Lane Departure Warning Systems for the Trucking Industry. February 2009. Arlington, VA.  
ATRI. Analysis of Benefits and Costs of Forward Collision Warning Systems for the Trucking Industry. February 2009. Arlington, VA.  
ATRI. Analysis of Benefits and Costs of Roll Stability Control Systems for the Trucking Industry. February 2009. Arlington, VA.

Top Industry Issues Survey Results				
2009	2008	2007	2006	2005
1. Economy	1. Fuel Costs	1. Hours-of-Service	1. Driver Shortage	1. Fuel Costs
2. Government Regulation	<b>2. Economy</b>	2. Driver Shortage	2. Fuel Issues	2. Driver Shortage
3. Fuel Issues	3. Driver Shortage/Retention	3. Fuel Issues	3. Driver Retention	3. Insurance Costs
4. Congestion/Highway Infrastructure	4. Government Regulation	4. Congestion	4. Hours-of-Service	4. Hours-of-Service
5. Hours-of-Service	5. Hours-of-Service	5. Government Regulation	5. Congestion	5. Tolls/Highway Funding
6. Commercial Driver Issues	6. Congestion	6. Tolls/Highway Funding	6. Government Regulation	6. Tort Reform/Legal Issues
7. Environmental Issues	7. Tolls/ Highway Funding	7. Tort Reform/Legal Issues	7. Highway Infrastructure	7. Government Regulation
8. Tolls/Highway Funding	8. Environmental Issues	8. Truck Driver Training	8. Tort Reform	8. Congestion
<b>9. Truck Size and Weight</b>	9. Tort Reform	9. Environmental Issues	9. Tolls/Highway Funding	9. Environmental Issues
10. Onboard Truck Technology	10. Onboard Truck Technology	<b>10. Onboard Truck Technology</b>	10. Environmental Issues	10. Truck Security

Notes: **Bold** issues are new to the top ten list.