CRITICAL ISSUES IN THE TRUCKING INDUSTRY – 2010

Presented to the
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Prepared by

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According to the nation's top economists, the worst recession since the Great Depression technically ended in June 2009. Since then, the economy has seen four straight quarters of growth in the United States Gross Domestic Product. However, growth has been slow, consumer confidence is volatile and unemployment continues to hover near double digits. Concerns over the fragility of the economic recovery continue to impact business and industry. The situation for motor carriers is exacerbated by the prospect of increased regulation and the potential costs associated with impending and as yet undefined regulatory mandates.

As a result of the continued uncertainty, the American Trucking Associations (ATA) has redoubled its efforts to anticipate those issues most likely to impact motor carriers in the coming years and provide leadership to protect the industry's interests. Key to this strategy is the annual survey of critical issues facing the trucking industry and ATA has once again commissioned the American Transportation Research Institute (ATRI) to conduct the survey. Now in its sixth year, 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 representative sample of for-hire and private carriers, representing a cross-section of fleet sizes, industry sectors and geographic regions.

The "Phase Two Survey" is distributed to a larger sample of 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=779) represent industry stakeholders from both the U.S. and Canada and include motor carriers, commercial drivers and other interested parties.

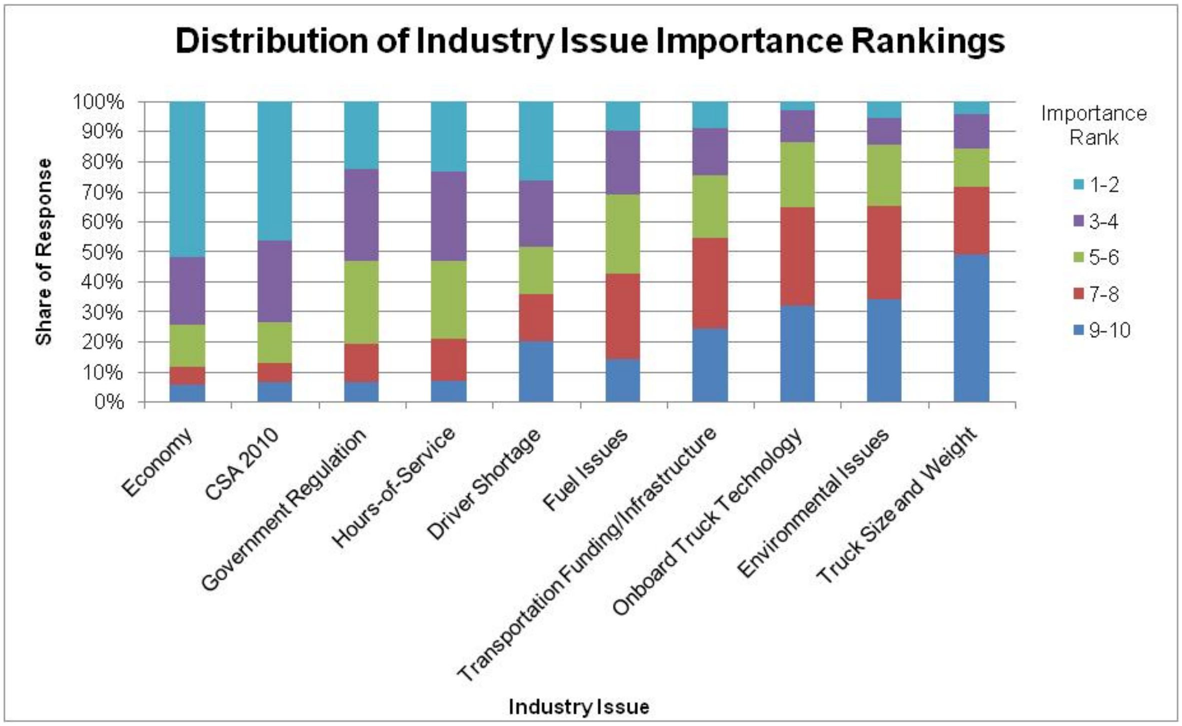
This report presents the findings of the 2010 annual survey and analysis, and further juxtaposes previous years' survey findings as an indicator of changing priorities in the trucking industry.

The top two issues identified by the industry in 2010 are the Economy and the ongoing implementation of the Comprehensive Safety Analysis 2010 (now simply referred to as CSA by the Federal Motor Carrier Safety Administration). This year's top issue, the Economy, was also the top issue last year.

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. The issue scores are then averaged across respondents and ranked to quantify the relative importance of the issue to survey respondents (1=most important, 10=least important).

In rank order, the top ten issues identified by industry respondents are detailed below. Figure 1 shows a breakdown of the rankings for each of the top issues, from 1st place to 10th place (left-to-right).

Figure 1 – Distribution of Industry Issue Prioritization Scores



1. **Economy**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Score
35.7%	16.3%	11.6%	3.20

As was the case in 2009, the state of the nation's economy was the top concern for industry respondents. In 2010, approximately 35 percent of respondents ranked this issue 1st. Interestingly, this is a marked decrease from 2009, where 51.6 percent ranked the economy as the number one issue. This decrease likely reflects the improvements experienced in the economy over the past year and speaks to the impact that increasing freight demand is having on individual priorities. Economists at ATA note that truck volumes are beginning to rebound, the oversupply of capacity is diminishing, and driver availability is tightening[1]. All of these indicators point to an emerging economic recovery.

<u>Proposed Strategies (in rank order):</u>

a) *Advocate for policies to stimulate economic recovery and benefit the industry through increased freight demand.* Nearly half (47%) of respondents ranked this strategy 1st, acknowledging the strong relationship between increased economic activity and freight demand. As consumer demand ramps up in a just-in-time economy, recovery for the trucking industry follows quickly. Increases in

[1] *Trucking Economic Review*. American Trucking Associations. June 25, 2010.

manufacturing and retail demand have jump-started this effect[2]. A secondary impact of an improving economy in an industry with decreased capacity is the ability to generate improved pricing and higher driver wages.

b) *Analyze the role of the trucking industry as an employment generator in relation to other modes and sectors.* While unemployment hovers near 10 percent nationally, the trucking industry is in a unique position to be facing a potential driver *shortage*. The industry should capitalize on this opportunity to lead the way in putting Americans back to work in jobs that, according to the U.S. Bureau of Labor Statistics, pay on average $39,000 annually[3]. In addition, the trucking industry's high employment levels provide an extremely favorable comparison to all other modes when competitive advantages are assessed.

c) *Support and pursue increased federal funding for transportation infrastructure to increase the nation's competitiveness.* While this may be a longer term financial solution given current economic conditions, respondents recognized that the limitations and deficiencies of the U.S. freight transportation system remain unsolved. As many experts note, now is the opportune time to leverage federal funding for capacity and mobility improvements. As the economy rebounds and there are corresponding increases in trucking activity and freight volumes, the investments made now will help alleviate freight chokepoints in the future.

2. **Comprehensive Safety Analysis 2010 (CSA)**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Score
25.2%	21.1%	15.6%	3.43

CSA made its debut this year as the number two concern, supplanting last year's second place issue, government regulation (although clearly CSA is the result of expanded government regulation). With over a quarter of respondents ranking this issue 1st, CSA surged to the top of the list not only due to the expansive nature of FMCSA's new regulatory framework, but also due to the uncertain impact CSA will have on carriers and drivers. With the CSA pilot program already underway and full implementation slated for 2011, respondents recognized how critical it is for the industry to be actively engaged in helping shape CSA during these important formative months.

Proposed Strategies (in rank order):

a) *Engage policymakers to ensure that major industry concerns are addressed.* With the details of CSA still being finalized, 48 percent ranked this strategy 1st, understanding that there is still an opportunity to shape CSA so that it meets government and industry objectives. This strategy is already proving successful. The industry has met with FMCSA to detail specific concerns brought to light during the pilot program and in response, FMCSA has implemented changes to the CSA methodology. However, the industry's challenges with crash accountability determination have not yet been resolved, among other items.

[2] Ibid.
[3] Bureau of Labor Statistics. May 2010. Occupational Employment and Wages. Available Online: http://www.bls.gov/oes/current/oes533032.htm

b) *Develop programs to inform drivers and carriers of potential impacts resulting from full CSA deployment.* Recognizing the confusion and uncertainty surrounding CSA, respondents ranked this as the second most important strategy. The experience of carriers and drivers in the existing CSA pilot program can be tapped in developing industry education and outreach programs that explain how CSA will impact their operations.

c) *Ensure carrier access to the CSA database for expedited resolution of data deficiencies and errors.* It was also recognized that once CSA is implemented, there must be a means for disputing and resolving data errors which ultimately impact a carrier's score. Transparency in the data inputs and methodology will allow carriers to proactively understand and monitor the basis for their scores. Similarly, this transparency will facilitate expedited discovery and resolution of disputed data.

3. **Government Regulation**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Score
10.1%	12.4%	16.6%	4.46

Government regulation slipped one spot in 2010 to 3rd place; however one out of ten respondents still listed this as their top concern. This continued high ranking of government regulation is in large part due to legislative activities, at both the national and local levels, which trucking industry stakeholders perceive as detrimental to industry operations and finance. While interstate motor carriers are primarily regulated by the U.S. Department of Transportation, a host of local, state and federal regulations are increasingly imposed on the industry, increasing compliance costs with little to no commensurate return, in some cases, for safety or productivity.

Proposed Strategies (in rank order):

a) *Educate specific lawmakers and regulators that have trucking oversight responsibilities on the realities of the business environment, and the practical impact of various regulatory controls on trucking.* Nearly two-thirds (60%) of respondents ranked this as the top strategy for dealing with increased regulation. Critics argue that many legislative initiatives disrupt normal business operations and may generate unintended consequences. A strategy for informing specific legislators on these impacts prior to enactment of the legislation is the preferred option.

b) *Work with regulators and the public to inform them of the costs and benefits of certain policies on both the trucking industry and the broader supply chain.* In these difficult economic times, the trucking industry is especially hard-pressed to absorb new costs associated with unfunded mandates. As a result, increased compliance costs will eventually translate to increased costs for consumers. Respondents proposed educating the public and regulators on the supply chain and consumer impacts of increased compliance costs for freight transportation providers.

c) *Maintain existing, and continue to develop new, relationships with various government policymakers in order to educate them on the essentiality of a* *healthy, vibrant and productive trucking industry.* This strategy speaks to the need for continued outreach by the trucking industry to key policymakers, with a focus on the industry's critical role in the U.S. and global economies.

4. **Hours-of-Service**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Score
9.0%	14.5%	15.3%	4.50

Rules regulating commercial driver Hours-of-Service (HOS) climbed one spot after taking the 5th spot in 2009 and 2008. HOS peaked as the number one issue in 2007 shortly after a court order put the rules in jeopardy. In late 2009, as part of a settlement agreement, FMCSA agreed to once again revisit the HOS rules. The subsequent climb in ranking this year is the result of the uncertainty over any new rules that may be promulgated by year's end. Nearly 40 percent of respondents ranked this as the 1st, 2nd, or 3rd most important issue.

Proposed Strategies (in rank order):

a) *Educate policymakers on the safety record of the trucking industry operating under the current HOS.* Recent statistics from the National Highway Traffic Safety Administration showed that truck-involved fatalities dropped 20 percent from 2008 to 2009, to their lowest level ever recorded.[4] Since the first hours-of-service change in 2004, fatalities have fallen 33 percent. The industry points to this continually improving safety performance under the current HOS as rationale for keeping the current HOS rules intact; 56 percent of respondents ranked this as the top strategy.

b) *Research more innovative ways to combat driver fatigue that might be more flexible than current HOS regulations.* This strategy advocates for additional flexibility in HOS rules through deployment of scientifically based fatigue countermeasures. Fatigue management programs which combine driver education on sleep need and sleep hygiene with screening and treating for sleep disorders hold the promise of more customized and subjective means for managing individual driver fatigue.

c*) Support programs that generate scientific evidence of the safety impacts of the HOS rules.* As a corollary to broadcasting the success of current HOS rules, respondents also felt it was important reinforce the scientific basis for the HOS to inform the debate and guide future rulemakings on commercial driver HOS.

[4] NHTSA. *Traffic Safety Facts*. August, 2010. http://www-nrd.nhtsa.dot.gov/Pubs/811363.pdf. Accessed 01 October 2010.

5. **Driver Shortage**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Score
12.0%	14.2%	12.7%	5.13

The Driver Shortage returned as a stand-alone issue in the 2010 survey, coming in at number five. In the 2009 survey, driver shortage became part of a more generic list of commercial driver issues which ranked sixth in 2009. This is yet another indicator that the economy is beginning to recover, and many industry stakeholders predict a driver shortage crisis on the horizon. It may also reflect new safe-driver hiring challenges placed on carriers by new regulations such as CSA 2010. Twelve percent of respondents ranked this issue number one, compared to 10 percent and 9 percent for the 3rd and 4th most important issues, respectively. This higher concentration of first-place votes may reflect a deepening driver shortage in some sectors of the industry which has not yet permeated others.

During the recession, carriers scaled back or eliminated entry-level driver training and/or hiring. Decreased freight demand was also viewed by some in the industry as an opportunity to scale back the driver population by eliminating those with marginal safety records. With demand returning, many in the industry believe that driver recruitment and retention will once again be a major issue.

Proposed Strategies (in rank order):

a) *Evaluate the competitiveness of driver pay and benefits to better compete with other professions.* Forty-three percent of respondents identified this as their top strategy for dealing with the driver shortage. Specifically, a rebounding economy will mean increased job opportunities in construction, a primary competitor with the trucking industry. Given constantly changing conditions in the labor marketplace, respondents felt that the industry should continually evaluate driver pay and benefits to ensure that the trucking industry remains competitive with other industries.

b) *Address quality of life concerns by developing programs that advance work/life balance, healthy lifestyles and family relationships*. Coming in a close second, respondents believe that the industry must aggressively seek out ways to improve the quality of life for commercial drivers as a key recruitment and retention strategy. Particularly in the over-the-road sector, the demands of long time periods away from home put additional burden on drivers and may force some to leave the industry prematurely. Drivers need the resources to maintain family connections, protect their health and reduce stress while on the road.

c) *Engage in high-profile marketing and recruiting efforts to get more people interested in the industry (such as ad campaigns, apprentice programs and vocational education).* Also, many respondents reported that they would like to see the trucking industry engage in more traditional marketing campaigns to tap new sources of drivers. With a focus on vocational education and apprentice programs, the industry has an opportunity to attract younger drivers before those individuals choose alternate career paths.

6. **Fuel Issues**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Rank
2.5%	7.3%	8.8%	5.83

The volatility of fuel prices has caused the ranking of fuel issues to vary widely over the past few years. Fuel issues ranked 1st in 2005 and again in 2008, but dropped to 3rd in 2009. This year, the issue has fallen even further to 6th. With the global recession reducing the overall demand for fuel, prices continue to remain relatively low. After peaking at more than $4.70 gallon in July 2008, the national diesel fuel average had declined 40 percent by August 2010.[5] Nevertheless, respondents were still concerned about fuel as a long-term issue, with many recognizing the uncertainty of a fuel supply that is reliant on sometimes unstable foreign sources. As the global economy recovers, an increase in demand will almost certainly place upward pressure on fuel prices, which could push the fuel issue much higher in the future.

Proposed Strategies (in rank order):

a) *Encourage the development of less price-volatile sources of oil including increased domestic production*. Respondents considered the volatility of energy prices to be a major problem. Forty-two percent of respondents believed the development of less price-volatile sources of energy, including domestic production, should be the top strategy in dealing with fuel issues. Fuel typically represents the second highest cost center for a motor carrier (behind labor). Therefore, the impact to a carrier's bottom line from wildly fluctuating fuel prices can be significant.

b) *Advocate for measures to reduce financial speculation on energy sources that result in large price fluctuations.* After sharp increases in fuel prices in 2008, many groups issued calls for investigations of price-fixing, energy speculation and futures trading. Many individuals believed that market speculators, rather than traditional supply and demand forces, artificially drove energy prices up. The recently enacted overhaul of financial regulations on Wall Street and other financial institutions included provisions for more transparency of derivatives trading, where commodities such as oil are often traded. However, respondents still felt that more needs to be done to ensure large artificial price adjustments do not occur in the future.

c) *Support innovation in efficiency to cut fuel usage and promote renewable fuels that are economically feasible*. With fuel as a top cost center, motor carriers aggressively seek out ways to cut fuel use. The challenge lies in scientifically vetting and advancing the numerous tools and technologies continually being brought to market purporting to reduce fuel consumption. This strategy acknowledges the need for innovation in this area while also calling for promotion of renewable fuels where the return-on-investment from their use is clear.

[5] Department of Energy, Energy Information Administration. Accessed October 04, 2010. http://tonto.eia.doe.gov/oog/info/gdu/gasdiesel.asp

7. **Transportation Funding / Infrastructure**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Score
2.5%	6.5%	6.0%	6.45

Transportation funding and infrastructure was a hybrid issue this year, combining elements of highway congestion, infrastructure and transportation funding. In 2009, congestion was the 4th most pressing issue and transportation funding ranked 8th overall. The 7th place finish of this combined issue can be attributed in part to the recession, which has reduced overall vehicle miles traveled, which in turn reduced congestion. However, respondents clearly recognized the long-term importance of addressing the state of the nation's infrastructure and how it is funded over time. Ongoing congestion impacts, deteriorating highway infrastructure and a lack of movement on highway reauthorization have all combined to keep this issue in the industry's top 10.

Proposed Strategies (in rank order):

a) *Continue to research the cost of bottlenecks and the indirect cost of not improving transportation infrastructure.* Fifty-five percent of respondents selected this as the top strategy. Despite a surge of federal stimulus money targeted towards the transportation system, there remains a serious funding shortfall in addressing the nation's infrastructure needs. This necessitates targeting limited resources on those bottlenecks with the greatest impact on freight mobility. These freight chokepoints are well documented. The joint FHWA / ATRI "Freight Performance Measures" initiative recently released its list of 100 bottlenecks.[6] In 2011, ATRI will expand this list to 250 bottlenecks.

b) *Advocate for a fuel tax increase by conducting research that assesses the benefits of increased fuel tax revenue*. Despite the volatile nature of fuel prices and the annual fluctuations in vehicle miles traveled, the industry continues to support increasing the federal and state fuel taxes as a more predictable and stable source of funding the nation's highway system. Key to capitalizing on the benefits of fuel tax increases, however, is statutory language that ensures fuel tax revenues are used exclusively for roadway improvements.

c) *Support research to document the hidden costs and impacts of creative financing tools*. Research has shown that the existing fuel tax system is an extremely efficient method of collecting and returning roadway-user revenue back into the nation's roadways.[7] Unfortunately, many decision-makers are not aware that alternative forms of revenue collection, such as tolling and other creative financing tools, return a significantly smaller proportion of user fees back into infrastructure improvements and maintenance.[8]

[6] ATRI. *2009 Bottleneck Analysis of 100 Freight Significant Highway Locations*. http://www.atri-online.org/index.php?option=com_content&view=article&id=248&Itemid=75. Accessed October 04, 2010

[7] ATRI. *Defining the Legacy for Users: Understanding Strategies and Implications for Highway Funding*. May 2007.

[8] Ibid.

8. **Onboard Truck Technology**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Score
0.9%	2.0%	6.1%	7.09

After first surfacing in 2007 as a top ten issue and remaining in the 10th place spot each year since, Onboard Truck Technology climbed two spots this year to the 8th most pressing issue in the industry. The primary drivers behind this climb include the focus by both the U.S. and Canada on mandated use of Electronic Onboard Recorders (EOBRs) for HOS compliance and speed limiters/governors for speed management. Additionally, FMCSA has invested millions into the testing and evaluation of onboard safety systems (lane departure warning, collision warning, roll stability control), helping to strengthen a congressional proposal to provide federal tax credit for investing in safety technologies. Increasing attention on the role of technology to monitor compliance and increase safety will likely mean that Onboard Truck Technology will continue to rank in the industry's top ten issues.

<u>Proposed Strategies (in rank order):</u>

a) *Pursue tax incentives to offset the cost of investing in onboard safety systems.* As was the case for the past two years, this was identified as the top truck technology strategy with 43 percent of respondents ranking this strategy 1st. The trucking industry supports technologies that can improve overall industry safety. In research sponsored by FMCSA, ATRI has documented that onboard safety systems can marginally meet carrier safety and financial objectives.[9] However, absent additional regulatory relief or tax or insurance credits, it is possible that onboard safety system investments will decrease over time as competing investment priorities arise.

b) *Document full costs and benefits of EOBRs as well as carrier-level adoption issues and approaches.* Research, grounded in empirical data that demonstrates safety benefits and a positive return-on-investment for EOBR technology, is crucial for carriers to evaluate deployment options.

c) *Encourage widespread use of EOBRs within the industry for use in HOS compliance.* The inclusion of this strategy in the top three demonstrates the growing acceptance of EOBRs as a compliance tool and safety system. Recently, an alliance of five large interstate truckload carriers called for legislation mandating EOBR use by all carriers subject to the HOS.[10]

[9] 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.
[10] Heavy Duty Trucking. *Carrier Alliance Pushing for Congress to Pass EOBR Mandate Next Year.* September 30, 2010. Available at: http://www.truckinginfo.com/news/news-detail.asp?news_id=71793. Accessed on 10/13/10.

9. **Environmental Issues**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Score
1.3%	4.0%	3.5%	7.16

Environmental issues retreated two spots to 9th this year, attaining its lowest ranking since 2007. More pressing issues, such as the economy and CSA 2010 continue to trump environmental concerns. The continued propagation of anti-idling regulations, federal and state equipment mandates, and the ongoing debate on carbon taxing and cap and trade legislation has many industry stakeholders worried that costs associated with compliance will greatly outweigh expected benefits. The abundance of existing and proposed regulations that seek to reduce emissions and greenhouse gases makes it likely that environmental issues and industry concerns will mount over the next few years once more pressing economic issues are resolved.

Proposed Strategies (in rank order):

a) *Ensure that regulations are based on factually correct cost/benefit analyses and sound scientific evidence.* A remarkably high 66 percent of respondents ranked this strategy 1st. While many in the industry understand the importance of protecting the environment, many are hesitant to support environmental initiatives that increase costs at a time when the economic conditions are so constrained. These hesitations are exacerbated by the uncertainty of overall program costs and corresponding return-on-investment. Therefore, respondents felt it was important for the industry to continue to monitor and evaluate new mandates to quantify whether the benefits of new regulations outweigh the costs.

b) *Pursue government incentives to curtail costs of implementing new regulations on the industry.* As is the case with EOBRs and onboard safety system technologies for safety, the trucking industry is supportive of measures that improve both operations and the environment. However, many of these measures can be extremely costly. Costs of additional regulations accrue directly to the bottom line and can significantly impact an industry with already thin operating margins. Respondents believed the industry should actively engage in identifying and lobbying for government incentives to help offset the costs of implementing environmental regulations.

c) *Advocate for higher productivity vehicles (HPVs) as an environmentally friendly and economically advantageous way to move goods more efficiently.* One innovative way for the industry to further reduce its impact on the environment is through higher productivity vehicles. Research has documented the energy and emissions benefits that accrue from the expanded use of HPVs.[11] In addition to environmental and congestion-reduction benefits, expanded use of HPVs also helps address another top industry issue – driver shortage.

[11] ATRI. Energy and Emissions Benefits of Higher Productivity Vehicles: Update 2008. March 2008. Arlington, Virginia.
ATRI. Energy and Emissions Benefits of Higher Productivity Vehicles. September 2004. Alexandria, Virginia.
ATRI. Estimating Truck-Related Fuel Consumption and Emissions in Maine: A Comparative Analysis for a 6-Axle, 100,000 Pound Vehicle Configuration. September 2009. Arlington, Virginia.

10. **Truck Size and Weight**

Ranked 1st	Ranked 2nd	Ranked 3rd	Average Score
1.6%	2.7%	4.4%	7.61

For only the second time, "size and weight" ranked as a top ten industry issue. Truck size and weight flexibility is seen as a potential solution to congestion problems, environmental issues, and may even lessen a looming driver shortage. With those benefits in mind, there is interest by the trucking industry, shippers and many environmentalists to revise size and weight limitations imposed by the federal government in 1991. Studies are currently underway in the United States and Canada to understand the impacts of higher productivity (longer and heavier) vehicles.

Proposed Strategies (in rank order):

a) *Encourage modifications to existing size and weight restrictions in order to maximize productivity and minimize congestion.* Over half (53%) of respondents ranked this strategy 1st. By increasing gross vehicle weights or the maximum length of combination vehicles, many industry stakeholders believe that goods could be transported much more efficiently, which would have positive impacts on congestion, safety and truck emissions.

b) *Assess the role that higher productivity vehicles can play in dedicated truck lanes and facilities*. There is a continued push to research the benefits of dedicated truck lanes on interstate highways. Dedicated truck lanes provide separation of cars from trucks, increasing safety and alleviating congestion. However, dedicated truck lanes may also offer the potential to expand the existing higher productivity vehicle network. More research is needed to identify where HPV expansion can result in safety and productivity benefits for freight transportation.

c) *Educate the public on the benefits of higher productivity vehicles.* In order to engage in an informed debate regarding size and weight revisions, the industry must ensure that decision-makers and the general public understand the benefits and demonstrated operating history of LCVs. Many outside the industry, for example, are not aware of the safety benefits that are typically associated with longer combination vehicles[12].

[12] Woodrooffe and Associates. *Long Combination Vehicle (LCV) Safety Performance in Alberta 1995 to 1998*. March 2001.

Top Industry Issues Survey Results					
2010	**2009**	**2008**	**2007**	**2006**	**2005**
1. Economy	1. Economy	1. Fuel Costs	1. Hours-of-Service	1. Driver Shortage	1. Fuel Costs
2. CSA 2010	2. Government Regulation	**2. Economy**	2. Driver Shortage	2. Fuel Issues	2. Driver Shortage
3. Government Regulation	3. Fuel Issues	3. Driver Shortage/ Retention	3. Fuel Issues	3. Driver Retention	3. Insurance Costs
4. Hours-of-Service	4. Congestion/ Highway Infrastructure	4. Government Regulation	4. Congestion	4. Hours-of-Service	4. Hours-of-Service
5.Driver Shortage	5. Hours-of-Service	5. Hours-of-Service	5. Government Regulation	5. Congestion	5. Tolls/Highway Funding
6. Fuel Issues	6. Commercial Driver Issues	6. Congestion	6. Tolls/Highway Funding	6. Government Regulation	6. Tort Reform/ Legal Issues
7. Transportation Funding/ Infrastructure	7. Environmental Issues	7. Tolls/Highway Funding	7. Tort Reform/ Legal Issues	7. Highway Infrastructure	7. Government Regulation
8. Onboard Truck Technology	8. Tolls/ Highway Funding	8. Environmental Issues	8. Truck Driver Training	8. Tort Reform	8. Congestion
9. Environmental Issues	**9. Truck Size and Weight**	9. Tort Reform	9. Environmental Issues	9. Tolls/Highway Funding	9. Environmental Issues
10. Truck Size and Weight	10. Onboard Truck Technology	10. Onboard Truck Technology	**10. Onboard Truck Technology**	10. Environmental Issues	10. Truck Security

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