Ranking the Trucking Industry’s Top Concerns

Earlier this year, ATRI unveiled its list of the top ten critical issues facing the North American trucking industry. For the third year in a row, the industry ranked the Hours-of-Service (HOS) rules as its top industry concern. For the past two years, major HOS impacts on supply chains were the impetus behind the first place ranking. In this year’s survey, carriers and drivers voiced their concern over the uncertain future of the current suspension of the rules.

The complete results of the annual survey of over 4,000 industry stakeholders were released in October at the 2015 Management Conference and Exhibition of the American Trucking Associations (ATA) meeting in Philadelphia, PA, the nation’s largest gathering of motor carrier executives. The ATRI Top Industry Issues report also solicited and tabulated specific strategies for addressing each issue.

Moving up a position from last year, FMCSA’s continued challenges with its Compliance, Safety, Accountability (CSA) program resulted in a second place ranking. CSA was closely followed in the ranking by the growing shortage of truck drivers. Related to the driver shortage, driver retention retained its fourth place ranking this year as trucking fleets work to retain their most experienced and qualified drivers.

The lack of available safe truck parking rounded out the 2015 list as the number five issue. Since first appearing as an issue in the annual survey, truck parking has been on the rise as an industry concern. It initially ranked 8th in the 2012 survey and has steadily climbed to the top five issues. Truck parking was also identified by ATRI’s Research Advisory Committee as the top research priority for 2015.

The survey also identified emerging issues in the trucking industry that generated a measurable amount of concern, but not enough to make the top ten list of most critical issues. Two issues which were added for the first time to the survey made the list of emerging issues, the first of which is the overall mission of the Federal Motor Carrier Safety Administration. Federal tax reform was the second emerging issue new to the survey this year.

“There is perhaps no better benchmark for the challenges we face as motor carriers and drivers than ATRI’s annual survey of top industry issues. As issues climb in ranking...

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The lack of available, safe parking is an issue that continues to challenge the trucking industry and led to its ranking as the number five issue on trucking’s list of top concerns. The need to identify real-world solutions to the problem drove ATRI’s Research Advisory Committee to make truck parking the number one research priority for 2015.

In response, ATRI has initiated a multi-phase research initiative entitled Managing Critical Truck Parking. In September, ATRI released the results of its Commercial Driver Perspectives on Truck Parking survey, the first in a series of technical memoranda focused on critical truck parking issues. The survey collected information from truck drivers on the use of private versus public rest stops, preferred locations for reserved parking, and the value of reserved truck parking. More than 1,400 surveys were collected by ATRI.

ATRI’s analysis of the survey data revealed several findings, including:

★ Nearly half of commercial vehicle drivers surveyed would refuse to pay for reserved parking;

★ Reservation parking systems near large metropolitan areas would have the highest utility; and

★ A disconnect exists between drivers’ interest in parking reservation systems and their willingness to pay for parking reservations.

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In September ATRI released the findings of its 2015 update to An Analysis of the Operational Costs of Trucking. Using financial data provided directly by motor carriers throughout the country, this research documents and analyzes trucking costs from 2008 through 2014 providing motor carriers with a high level benchmarking tool, and government agencies with a baseline for future transportation infrastructure improvement analyses.

The average marginal cost per mile in 2014 was $1.70, an increase from the $1.68 found in 2013. Despite falling fuel prices, the rise in average operating costs in 2014 is attributed to an increase in equipment purchases, as well as driver wage increases driven by the ongoing driver shortage and the need to retain the industry’s most experienced professional drivers.

“ATRI’s release of its annual Operational Costs of Trucking research is among our association members most eagerly anticipated. They understand and appreciate the value of ATRI’s operational cost analysis to their own fleet benchmarking and as such, are always willing participants when ATRI issues its call for cost data,” said Brenda Neville, President and CEO of the Iowa Motor Truck Association and a member of ATRI’s Research Advisory Committee.

Since its original publication in 2008, ATRI has received nearly 10,000 requests for its Operational Costs of Trucking report, which continues to be among the most popular of ATRI’s research studies. In addition to average costs per mile, ATRI’s report documents average costs per hour, cost breakouts by industry sector, and operating cost comparisons by region of operations.

A copy of the report is available from ATRI’s website at www.atri-online.org.
The ATRInsider

New ATRI Board Member – Derek J. Leathers

ATRI’s newest Board member is Werner Enterprises President and Chief Operating Officer Derek J. Leathers.

Leathers has worked in the transportation and logistics industry for more than 20 years. Throughout his tenure at Werner, he has held integral roles in many facets of the organization, including the establishment of Werner’s Mexico operations, oversight for all of the asset operating groups and leading the launch of Werner Global Logistics. Leathers holds a degree in economics from Princeton University. Werner Enterprises is among the five largest truckload carriers in the U.S.

Leathers was appointed by ATRI Chairwoman Judy McReynolds, president and CEO of ArcBest Corporation.

“We are very pleased to have Derek join the ATRI Board,” said McReynolds. “His vast industry experience and expertise will be of great value to our Board as we lead the Institute’s work to advance the trucking industry’s safety and productivity.”

RAC Member Amy R. Boerger

ATRI Research Advisory Committee (RAC) member Amy R. Boerger is currently the Vice President – North America Engine Business of Cummins Inc. In this role, Amy is responsible for:

★ Overall leadership for Engine Business Interests in North America
★ North American Truck and Bus OEM business
★ DOEM and industrial business for Heavy, Medium and Light Duty products

Most recently Amy served as General Manager – Field Sales and Support for Cummins, a position she had held since 2011. As General Manager of the Field Sales and Support organization for North America, Amy led a team of customer-facing territory managers and technical support managers who work closely with Cummins’ North America Distributors in support of customers and OEM dealers.

Amy joined Cummins in 1984 as an engineer. Since then she has had roles in automotive marketing, field sales and service, OEM account executive in the truck business and led Emission Solutions retrofit sales.

Amy grew up in and still resides in Indiana with her husband Brad.

ATRI’s Bottleneck Analyses Featured in New Report from American Highway Users Alliance

The American Highway Users Alliance (AHUA) recently released its report, Unclogging America’s Arteries 2015 – Prescriptions for Healthier Highways. ATRI played a significant role in the development of the AHUA study, which identifies the nation’s 50 top bottlenecks for cars and trucks combined. The report also highlights ATRI’s work in identifying truck-specific bottlenecks.
“Understanding the expectations of trucking companies and professional drivers is of critical importance to truck stop operators,” said Lisa Mullings, President & CEO of NATSO, the association representing truck stops. “ATRI’s analysis will provide important guidance to truck stops as they work to meet their customers’ operational and safety needs.”

ATRI is now working on subsequent tasks in the Managing Critical Truck Parking initiative which include: synthesizing ATRI survey data with FHWA’s newly released Jason’s Law report; assessing truck parking supply and demand utilizing ATRI’s extensive truck GPS database; and analyzing the impact of non-commercial vehicle use of truck parking spaces.

A copy of the Tech Memo is available from ATRI’s website at www.atri-online.org.

**New ATRI Research Quantifies Impact of Non-PreventableCrashes on CSA Scores**

Driven by the industry’s concern over the lack of a preventability determination in CSA, ATRI’s Research Advisory Committee identified as a top priority topic research that would quantify the impact that excluding non-preventable crashes would have on motor carrier Crash Indicator BASIC measures. ATRI recently released the results of its analysis, *Assessing the Impact of Non-Preventable Crashes on CSA Scores*.

ATRI’s analysis used carrier crash records, mapped to the FMCSA’s Motor Carrier Management Information System (MCMIS) database, to identify a small and non-controversial subset of non-preventable crashes with the following causes:

- Animal collision
- Other vehicle hits legally parked truck
- Other vehicle ran a stop light / sign and hit a truck
- The driver of the other vehicle was DUI
- Truck-assisted suicide

The ATRI analysis then removed these crashes and “recalculated” the Crash Indicator BASIC measure. Among the more than one dozen carriers in ATRI’s analysis, the Crash Indicator BASIC decreased nearly 15 percent once the non-preventable crash subset was removed.

![Percent Change in Carrier Crash BASIC Measure](chart)

““The trucking industry has identified a number of flaws in FMCSA’s calculation of carrier safety performance through the CSA BASICs and perhaps none is more egregious than the inclusion of non-preventable crashes in the Crash Indicator BASIC. ATRI’s latest analysis, using a very conservative definition of non-preventable crashes, demonstrates just how skewed FMCSA’s BASIC calculations can be,” said Scott Mugno, a member of ATRI’s.

*(Continued on page 6)*
ATRI recently released the latest findings of its annual truck bottleneck listing. The 2015 Congestion Impact Analysis of Freight-Significant Highway Locations, which assesses the level of truck-oriented congestion at 250 locations on the national highway system, uses several customized software applications and analysis methods, along with terabytes of data from trucking operations to produce a congestion impact ranking for each location. The data is associated with the FHWA-sponsored Freight Performance Measures (FPM) initiative. The locations detailed in this latest ATRI report represent the top 100 congested locations.

The number one spot on the ATRI list this year is the Tom Moreland Interchange in Atlanta, GA, a five-level stack interchange at the intersection of I-285 and I-85. Known by local commuters as “Spaghetti Junction,” it is not only the confluence of two highly traveled interstates, but also provides ramps to four secondary roadways. Also notable on this year’s list – four of the top 10 truck chokepoints are located in Houston, TX. The top 10 locations on the ATRI list this year are:

1. ATLANTA, GA: I-285 AT I-85 (NORTH)
2. CHICAGO, IL: I-290 AT I-90/I-94
3. FORT LEE, NJ: I-95 AT SR 4
4. LOUISVILLE, KY: I-65 AT I-64/I-71
5. HOUSTON, TX: I-610 AT US 290
6. HOUSTON, TX: I-10 AT I-45
7. CINCINNATI, OH: I-71 AT I-75
8. HOUSTON, TX: I-45 AT US 59
9. LOS ANGELES, CA: SR 60 AT SR 57
10. HOUSTON, TX: I-10 AT US 59

“With a robust economy comes increased demand for consumer goods, the lion’s share of which is carried by truck. We see that reflected in the ATRI truck bottleneck list as more trucks move through the nation’s major metropolitan areas to deliver the goods,” said Ed Crowell, Georgia Motor Trucking Association President and CEO. “ATRI’s ranking allows states to better understand where targeted infrastructure improvements could keep the economy moving.”

For access to the full report, including detailed information on each of the 100 top congested locations, visit www.atri-online.org. For each bottleneck listed, ATRI provides a time-of-day profile which identifies the best and worst times of the day for trucks to travel through those locations. To date, at least four states have referenced the ATRI report to justify new construction spending on bottleneck locations.
ONE SMALL STEP OR ONE GIANT LEAP

THANK YOU CONTRIBUTORS!

Earlier this year, ATRI asked the industry to STEP UP and support its critical research through charitable contributions. The industry responded in several ways. Some of ATRI’s core contributors stepped up and increased their annual giving amount. Others in the industry stepped up with a first-time contribution. And some took the giant leap to become a new core contributor with the commitment for an ongoing annual contribution.

However you choose to leave your footprint, we thank you. ATRI is the trucking industry’s source for scientific data and analysis on the many high priority issues facing freight transportation today and your support ensures that ATRI will continue to deliver on its mission.

Join us in thanking the individuals and organizations listed here who responded to the call for the industry to STEP UP and increased their current annual support, made a first-time contribution or took the giant leap to become a core contributor and give on an annual basis.

If you or your company has not contributed in the past, now is the time to STEP UP and do your part. There’s still time to leave your footprint.

View www.atri-online.org to explore your giving opportunities.

STEP UP
And leave your footprint.
ATRI Researchers to Participate in Transportation Research Board Annual Meeting

The 95th Annual Meeting of the Transportation Research Board (TRB) will be held January 10-14, 2016 in Washington, DC with over 12,000 expected attendees. The meeting program will cover all transportation modes, with more than 5,000 presentations in nearly 800 sessions and workshops, addressing topics of interest to policy makers, administrators, practitioners, researchers, and representatives of government, industry, and academic institutions.

The ATRI staff is actively involved in TRB committees including the Truck and Bus Safety Committee, the Freight Performance Measures Committee, the Standing Committee on Truck Size and Weight, the Intermodal Freight Committee and the Trucking Industry Research Committee, for which ATRI’s Dan Murray serves as Vice Chair. ATRI research will be presented at several TRB sessions and committee meetings. If you are attending the TRB Annual Meeting, you can visit with the ATRI staff in the Exhibit Hall at booth 425.