



Empty Seats and Musical Chairs

Critical Success Factors in
Truck Driver Retention

PREPARED BY
THE GALLUP ORGANIZATION

FOR THE
ATA FOUNDATION

OCTOBER 1997

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Alexandria, Virginia.

ATA Product Code: CO926

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For information about this publication, contact the American Trucking Associations Foundation, 2200 Mill Road, Alexandria, Virginia 22314, telephone (703) 838-1966. Additional copies can be purchased for \$25.00 per copy by calling 1-800-282-5463.

Printed in the United States of America.

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ACKNOWLEDGEMENTS

This study was prepared by The Gallup Organization under the direction of Dr. Debra Christenson. She was assisted by Dr. Ron Aames, Jon Hughes and Mike Kinney. The authors wish to acknowledge the contributions of Dr. Bill Rogers, Director of Research of the ATA Foundation, Laurie Baulig, Vice President for Labor and Human Resources Policy of the American Trucking Associations, and Lana Batts, President of the Truckload Carriers Association.

About The Gallup Organization

From the household to the boardroom, Gallup is the most trusted name in survey research. Known worldwide for The Gallup Poll, their mission is to "help people be heard." The Gallup Organization, founded in 1935 by Dr. George H. Gallup, Sr., is world-renowned for the development and implementation of measurement systems using survey research methodologies. Gallup conducts survey research encompassing a wide range of issues and clients, including product and service quality measurement.

The world headquarters of The Gallup Organization are located in Princeton, New Jersey. Gallup's Central Operations Headquarters are based in Lincoln, Nebraska, providing a centrally located national processing center, as well as a large, well-educated work force from which to draw telephone interviewers and other professional employees. The Gallup Organization also has offices in Washington, D.C.; Los Angeles, CA; Houston and Austin, TX; Minneapolis, MN; Atlanta, GA; and Chicago, IL. Gallup also maintains wholly or majority-owned offices in forty-five locations spanning over 80 nations.

Gallup is a full-service research company comprised of over 1,400 full-time and part-time professionals with technical proficiency in research design, survey implementation, and data analysis. Over 100 of these professionals are Ph.D.-level researchers. The staff at Gallup has designed and conducted hundreds of quantitative and qualitative research projects, ranging from large and complex customized studies to monthly omnibus tracking and polls. These studies have employed diverse research methodologies including in-person, mail, and telephone surveys; literature reviews and meta analyses; integration of data from multiple databases; and analysis of primary and secondary sources. Quantitative and qualitative data from these studies have been analyzed and presented in thousands of reports, publications, and presentations.

Dr. Debra Christenson is a managing consultant at The Gallup Organization. As a research team leader, Dr. Christenson has responsibility for the overall direction and performance of projects for a range of

clients, including the Mortgage Bankers Association, the National Association of Securities Dealers, and the US Chamber of Commerce. She has been with The Gallup Organization for seventeen years, and holds a master's degree and Education Doctorate, both from the University of Nebraska.

Dr. Ron Aames is a Senior Research Director at The Gallup Organization. Dr. Aames arrived at Gallup in 1994 and has been responsible for designing, developing, and analyzing market research studies for such clients as UtiliCorp, Southwest Airlines, the New York/New Jersey Port Authority, the American Bar Association, and Ruan Transportation Management Systems. Dr. Aames is well-versed in the latest qualitative and quantitative research methods, questionnaire designs, and construction of models using sophisticated multivariate analyses. Dr. Aames holds a Ph.D. in sociology from the University of Wisconsin-Madison.

Jon Hughes joined the Gallup Organization in 1993 and currently serves as a Research Analyst. In this capacity, he has been involved in the research design and analysis for a wide variety of studies, including customer and employee satisfaction research, marketing and advertising tracking research, and public opinion polling. Mr. Hughes received his bachelor's degree in political science (quantitative methods) at the University of Toronto.

Mike Kinney is a Senior Project Administrator at The Gallup Organization. As the task director, Mr. Kinney coordinates and oversees the daily logistics and production aspects of a project. He has been with the Gallup Organization for eight years and his experience includes management of Gallup's monthly omnibus telephone studies and the telephone tracking surveys for Whirlpool, the Taubman Corporation and the National Federation of Independent Business.

I. ABSTRACT

Since 1980, the trucking industry, and particularly the truckload segment, has experienced a shortage of qualified drivers. This complex condition is the result of at least four factors: the growth in the trucking business, drivers leaving the profession, driver churning – that is, moving from one company to another – and workforce demographics.

This study is notable for its ringing confirmation of the findings of earlier research – findings that have been established again and again over time – as well as for its new and refined approach to the issue of driver retention.

While industry growth, competition from other sections of the economy, and the demographics of those who chose either to enter or avoid the truck driving profession are important factors in the driver shortage equation, the single most important feature of this condition is churning.

Between 1994 and 2005, the trucking industry will need to hire, on average, 403,000 truck drivers each year to fill empty seats. But more than 320,000 of those hires – or about 80 percent – are the result of intra-industry musical chairs or churning. On an annual basis, the industry will hire only 34,000 drivers (8 percent) because of industry growth and another 48,000 drivers (12 percent) due to driver attrition, either from retirement or leaving the profession altogether.

These statistics highlight the all important question: what must trucking companies do to stabilize their current workforce?

Over the last 10 years, the ATA Foundation has produced several important studies which examined this complex driver shortage issue.

In 1988, the ATA Foundation commissioned the Hudson Institute to quantify the extent of the driver shortage and recommend steps the industry should take to correct the condition. This critical examination of the driver shortage issue built on Hudson's landmark study, *Workforce 2000: Work and Workers for the Twenty-first Century*, which it prepared for the US Department of Labor.

In the Hudson study, researchers found that motor carriers tended to respond to the problem in one of two basic ways: to intensively recruit large numbers of drivers or to encourage retention by providing higher pay, more regular and predictable hours, greater benefits, or better equipment and working conditions. In the long run, the researchers concluded, "both strategies are likely to be necessary for the industry to have an adequate labor supply. Retention will be particularly important because attrition and turnover are the largest sources of job openings."

While industry growth, competition from other sections of the economy, and the demographics of those who chose either to enter or avoid the truck driving profession are important factors in the driver shortage equation, the single most important feature of this condition is churning.

In 1993, the Foundation commissioned the Upper Great Plains Transportation Institute of North Dakota State University, in Fargo, to study commercial driver job satisfaction. The study focused on drivers who had recently changed jobs and it provocatively concluded that "there is not a shortage of drivers, but a lack of human resource strategies to take advantage of the available pool."

At the October 1996 ATA Management Conference and Exhibition in San Antonio, Texas, the ATA Foundation brought together three individuals who were intimately familiar with the driver recruitment and retention issues to participate in a public Roundtable discussion. The participants were Richard Judy of the Hudson Institute; Dr. Debra Christenson of The Gallup Organization; and Patrick Quinn, Co-Chairman of US Xpress Enterprises, a leading truckload motor carrier that has had great success recruiting truck drivers from non-traditional sources. The participants in the Roundtable emphasized: the importance of human resource management; determining what motivates different people; managing the expectations of new entrants to the truck driving profession; and understanding why individuals stay with a particular company.

Building on this history and recognizing that the most critical feature of the driver shortage problem is retention and not recruitment, the ATA Foundation commissioned The Gallup Organization to undertake a study which clearly put the spotlight on retention.

The Gallup study set out to do three things:

- update the trucking industry and labor force demographic analysis from the 1988 Hudson Institute study;
- provide a better understanding of the unique attitudes about trucking held by people both inside and outside the industry and the effect of these attitudes on personnel management; and
- develop a retention model based on the factors that are most significant in promoting job satisfaction of long-tenured truck drivers – drivers who have been with their current company for five years or more.

The principal findings of the trucking and labor force demographic component of the study are not surprising:

- driver churning or turnover continues to represent 80 percent of the trucking industry's need for new drivers;
- the workforce segment that has traditionally been the prime source of labor for the trucking industry — males aged 20 to 24 — will grow by an average of only 0.7 percent per year between 1994 and 2005, which lags the 1.1 percent annual growth in new truck driver job openings; and

- the population groups that show the greatest labor force growth are those that have not traditionally been drawn to the truck driving profession – women and minorities.

With respect to attitudes about trucking, a principal finding is that those who work in trucking are worse critics of their own industry than the public at large. While trucking executives and truck drivers believe the public has a very negative attitude about truck drivers, most adults (80 percent) have a positive view of them. The realization and communication of this fact will help increase driver commitment to the industry and promote retention.

The most important component of the study — the Gallup Retention Model — turns the traditional employee exit interview on its head. Rather than attempting to understand why truck drivers leave a company, this research explored the reasons they stay.

Satisfied drivers equate to less turnover for a company and the industry as a whole. To identify the key components of "driver satisfaction," the research team interviewed 801 drivers who have been with their current company five or more years. The assumption was that these long-tenured employees have stayed with their companies because they are more satisfied. The research objective, then, was to determine the aspects of the job and the work environment that most account for their satisfaction, which, in turn, can be applied throughout an entire organization.

The surveyed drivers were asked to rate their level of satisfaction — from very satisfied to very dissatisfied — on 21 job attributes established in earlier research and in extensive interviews with trucking executives. Based on the driver responses, the Gallup research team divided these attributes into four factor groups:

- company support;
- non-driving activities and customer friendliness;
- hours of work and time with family; and
- work rewards.

Of the four factor groups which were critical to the complex psychological mix of driver satisfaction, the survey results and subsequent regression analysis suggest that the biggest payoffs will occur in the "company support" and "work rewards" areas. The company support group includes such attributes as "support from the company when on the

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road" and "company expectations about schedules." The "work rewards" group includes attributes such as "steadiness of the work" (consistent driving assignments) and "benefits." Next in importance is the "hours of work and time with family" group. And least important in terms of influencing driver job satisfaction is the "non-driving activities (loading and unloading, record keeping) and customer friendliness" factor group.

Across these four groups, five specific job attributes emerge as the most important predictors of overall satisfaction. These five attributes are:

- steadiness of the work (consistent driving assignments);
- genuine care of managers for their drivers;
- pay;
- support from company while on the road; and
- number of hours of work.

This analysis identifies which workplace conditions motor carrier management should address to most effectively improve overall satisfaction among drivers. These conclusions should also give carrier managers great hope because all of these attributes – and, consequently, the level of driver churning – are within their control.

II. BACKGROUND

Since 1980, the trucking industry has experienced a growing shortage of qualified drivers. In 1988, the ATA Foundation commissioned the Indianapolis-based think tank, Hudson Institute, to study steps that would allow the industry to correct the shortage. The study attempted to answer four important questions:

- What are the most important factors creating the shortage of drivers?
- How extensive is the driver shortage, and how has it affected various regions of the country and segments of the trucking industry?
- What have the most successful trucking companies done to recruit, train and retain good drivers?
- What steps can individual trucking companies or the trucking industry as a whole undertake to minimize driver shortage problems in the future?

Based on an analysis of the projected growth in freight traffic, data from the US Department of Labor, and attrition in the trucking industry, the Hudson Institute projected the industry would have to hire 300,000 drivers each year just to maintain its workforce, and 450,000 drivers between 1989 and 2000 to meet attrition and growth demands.

Continuing its efforts to shed light on the driver shortage issue, in 1993, the Foundation commissioned the Upper Great Plains Transportation Institute of North Dakota State University, in Fargo, to study commercial driver job satisfaction. The study focused on drivers who had recently changed jobs and it provocatively concluded that "there is not a shortage of drivers, but a lack of human resource strategies to take advantage of the available pool." However, the study did not address the reasons truck drivers remain loyal to one company.

Three years later, at the October 1996 ATA Management Conference and Exhibition in San Antonio, Texas, the ATA Foundation brought together three individuals who were intimately familiar with the driver recruitment and retention issues to participate in a public Roundtable discussion. The participants were Richard Judy of the Hudson Institute; Dr. Debra Christenson of The Gallup Organization; and Patrick Quinn, Co-Chairman of US Xpress Enterprises, a leading truckload motor carrier that has had great success recruiting truck drivers from non-traditional sources. The participants in the Roundtable emphasized: the importance of human resource management; determining what motivates different people; managing the expectations of new entrants to the truck driving profession; and understanding why individuals stay with a particular company.

Numerous articles in the press and conversations with trucking human resource managers have demonstrated that the truck driver demand projected in the Hudson Institute study has materialized – but cannot be met. However, the US Department of Labor has informed several motor carriers that the shortage projections are dated—that there is no shortage, merely a misallocation of resources—and refused to enter into arrangements at the local level to provide funds for training new truck drivers.

In an effort to better understand this important issue, the ATA Foundation in 1997 retained The Gallup Organization to study the shortage problem. In undertaking its research, Gallup used primary data collection methods (telephone interviews) and secondary data assessment and evaluation (prior trucking industry data and US Census Bureau projections). The study is comprised of four main components:

- As in the 1988 Hudson Institute study, a review and assessment of relevant demographic, economic and social factors thought to be causing or exacerbating the driver shortage.
- As in 1988, a survey of trucking company executives designed to obtain comparable data regarding the shortage's impact on trucking companies.
- A new enhancement—a random telephone survey of 1,000 adults across the US to test current public opinion concerning the image and awareness of the truck driving profession.
- The critical new enhancement—a telephone survey of 801 experienced drivers who have been with the same company for at least five years, to provide the industry with a better understanding of image, job satisfaction and commitment issues of long-tenured drivers.

The report is organized as follows. Section III presents Gallup's review and synthesis of existing demographic, economic and trucking industry data on labor supply and demand. Section IV provides insights into the driver shortage issue from leading trucking company executives. Section V presents the results of Gallup's telephone interviews of 1000 adults in the continental United States on their image and awareness of the truck driving profession. Section VI discusses the results of Gallup's telephone interviews with 801 truck drivers who have been with the same company at least five years. Section VII outlines additional research needs.

III. NEW TRUCK DRIVER DEMOGRAPHICS – CHURN, CHURN, CHURN

As an initial step in its research, Gallup reviewed existing demographic, economic and trucking industry data to quantify the magnitude of this problem between now and 2005. Specifically, the objectives of this review were to forecast the number of truck drivers needed during that time, indicate the size of the labor pools available for recruitment, and compare the growth in truck driving positions with that in construction jobs, construction being the key industry with which trucking competes for labor.

The main information sources utilized for preparing these projections were:

- *US Freight Transportation Forecast...to 2004 - Second Annual Report* (February 1996), prepared by DRI/McGraw-Hill and Martin Labbe Associates. This publication produced freight projections using a "bottom-up" approach that counted traffic in all commodity areas and delivery modes.
- The US Bureau of Labor Statistics' *Monthly Labor Review*, November 1995 edition. This publication makes overall and industry-specific labor force projections from 1994 to 2005.
- The American Trucking Associations' *American Trucking Trends*, 1995 edition. Figures taken from this ATA publication were originally obtained from the US Bureau of Labor Statistics' Employment and Earnings, 1984-1995.

The US Bureau of Labor Statistics' moderate estimate calls for a 10.3% increase in the number of truck drivers between 1994 and 2005. Specifically, the number of truck drivers employed in the United States would grow from 2,897,000 in 1994 to 3,196,000 over that eleven-year period.

Projections are reported from 1994 to 2005 because the original data which Gallup utilized were analyzed for that time frame.

Impact of Industry Growth on Driver Demand

The US Bureau of Labor Statistics' moderate estimate calls for a 10.3% increase in the number of truck drivers between 1994 and 2005. Specifically, the number of truck drivers employed in the United States would grow from 2,897,000 in 1994 to 3,196,000 over that eleven-year period. This equates to a compounded annual growth rate of roughly 0.9%.

According to DRI/McGraw-Hill and Martin Labbe Associates, which draws on freight volume across numerous industry sectors and delivery modes,

the truck population should grow 13.4% from 1994 (4,151,000 trucks) to 2004 (4,706,000 trucks). This equates to a compounded annual growth rate of 1.26%.

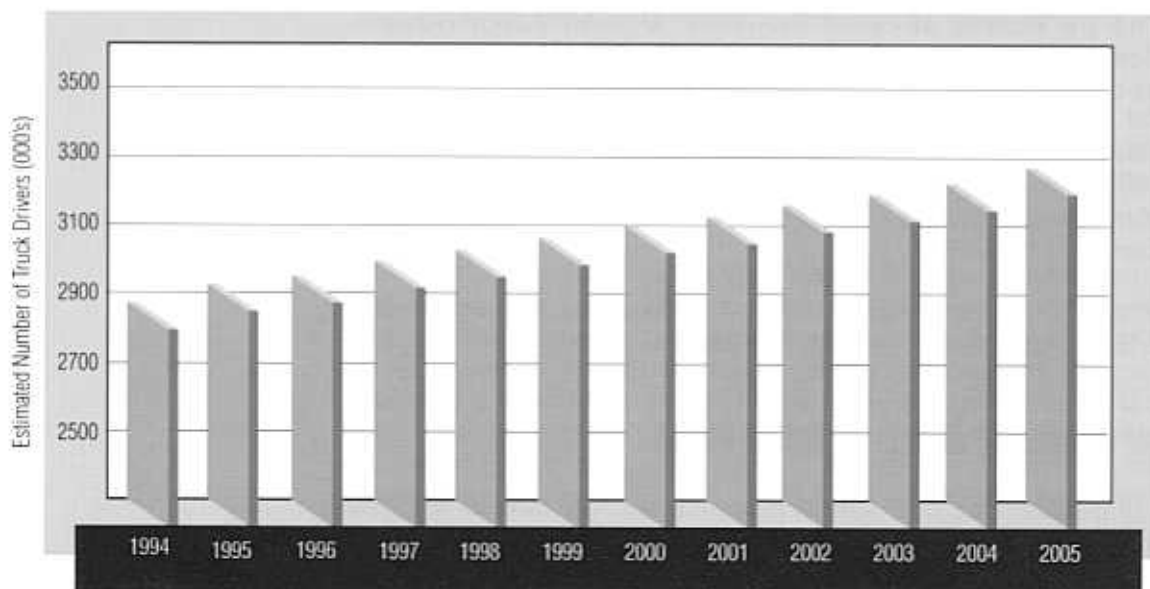
Taking an average of these two projections (1.1%), the growth chart displayed in Figure 1 was produced. An annual compounded industry growth rate of 1.1% would increase the number of truck drivers from just under 2.9 million (2,897,000) in 1994 to just under 3.3 million (3,267,000) in 2005. During the intervening years, the annual growth rate is assumed to remain a constant 1.1%.

Impact of Driver Attrition on Driver Demand

In addition to the trucking industry's projected growth, driver attrition through retirement or career changes will increase the demand for truck drivers over the next decade. In fact, the number of new hires that will

Figure 1

Projected Truck Driver Population



Sources and Notes:

U.S. Bureau of Labor Statistics, *Monthly Labor Review*, November 1995; DRI/McGraw-Hill/Martin Labbe Associates;
U.S. *Freight Transportation Forecast... to 2004*, February 1996.

be needed to replace departing drivers is anticipated to exceed that needed to accommodate the industry's expansion. The Bureau of Labor Statistics projects that 524,000 drivers will leave the profession from 1994 to 2005. Assuming an annual growth rate of 1.1% in the total number of drivers during that same period, this figure equates to an annual attrition rate of approximately 1.55%.

Given current employment numbers, this attrition rate suggests that the industry will have to hire roughly 45,000 to 50,000 drivers annually to replace drivers who decide to leave the industry.

Combined Impact of Industry Growth and Current Driver Attrition

Combining the effects of estimated industry growth and estimated annual driver attrition generates an estimate of the number of new drivers (meaning those who enter or re-enter, the truck driving occupation) who must be hired annually. Assuming constant industry growth and attrition rates over the coming decade, the number of new drivers hired would rise from 77,000 in 1995 to 86,000 in 2005. From 1995 to 2005, these estimates suggest that roughly 894,000 new drivers will need to be hired.

Total hires of truck drivers from the 1994 to 2005 will thus comprise three components: hires of new drivers because of industry growth (370,000), hires of new drivers to counter current driver attrition (524,000), and "turnover" hires (3,531,000). The estimated total hires needed from 1994 to 2005, then, amounts to 4,425,000.

Intra-Occupational Turnover

The foregoing estimate of 894,000 new hires excludes existing drivers who simply switch employers. Current Department of Labor estimates place this turnover figure at roughly 321,000 annually, or more than 3.5 million from 1994 to 2005.

Total hires of truck drivers from 1994 to 2005 will, thus, comprise three components: hires of new drivers because of industry growth (370,000), hires of new drivers to counter current driver attrition (524,000), and "turnover" hires (3,531,000). The estimated total hires needed from 1994 to 2005, then, amounts to 4,425,000.

Impact of the Changing Labor Force on the Supply of Potential Drivers

For the period between 1994 and 2005, the US Bureau of Labor Statistics estimates an annual growth rate of 1.1% for the entire American labor force. This represents a slower growth than during the previous twelve-year period (1982 to 1993), when the labor force grew by an average of 1.4% annually. The 1.1% rate for the overall workforce is the same as that estimated for the truck driving profession.

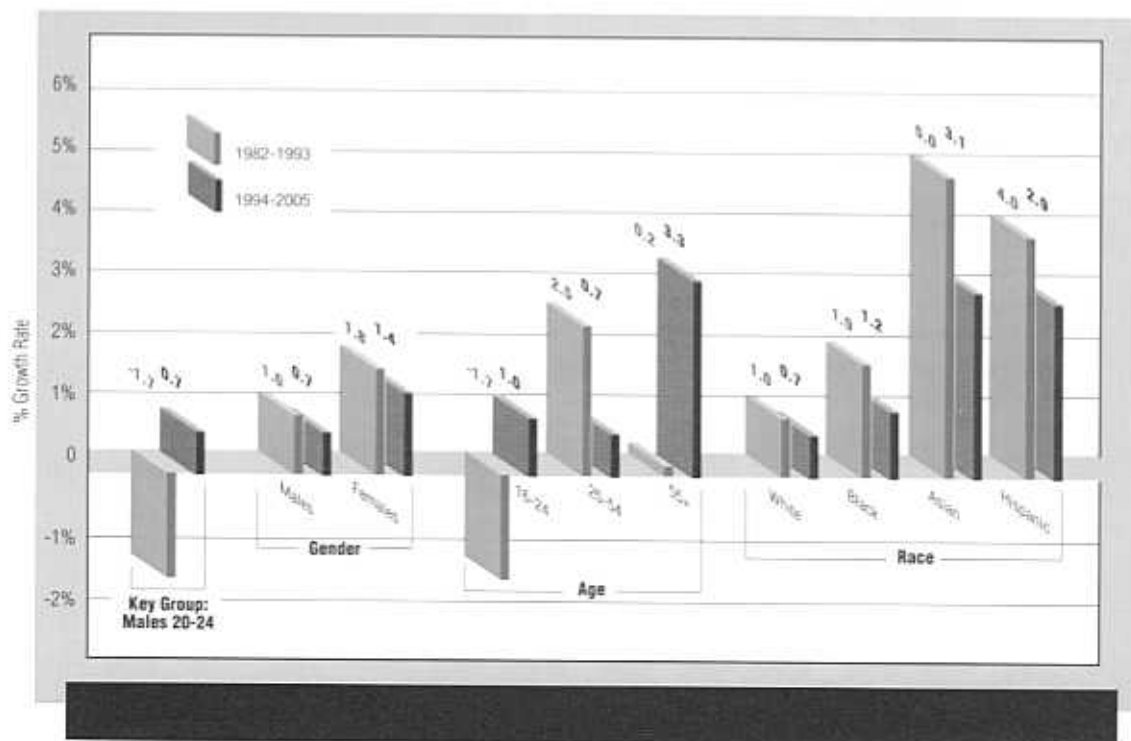
However, labor force growth will be concentrated in groups not traditionally prone to enter the truck driving industry: women and minorities (Figure 2). The female labor force will grow at twice the rate of the male labor force (1.4% versus 0.7% annually), while Asians (3.1%) and Hispanics (2.9%) will greatly outpace the growth rate of the white labor force (0.7%).

Another projection by the Bureau of Labor Statistics, as shown in Figure 2, is the rebound of young people, including young males, into the labor force. The 16-to-24 year-old age group will grow at a rate of 1.0% between 1994 and 2005, much improved from the group's rate of -1.7%

Figure 2

Projected Labor Force Characteristics

Annual Growth Rates, 1982-93 and 1994-2005

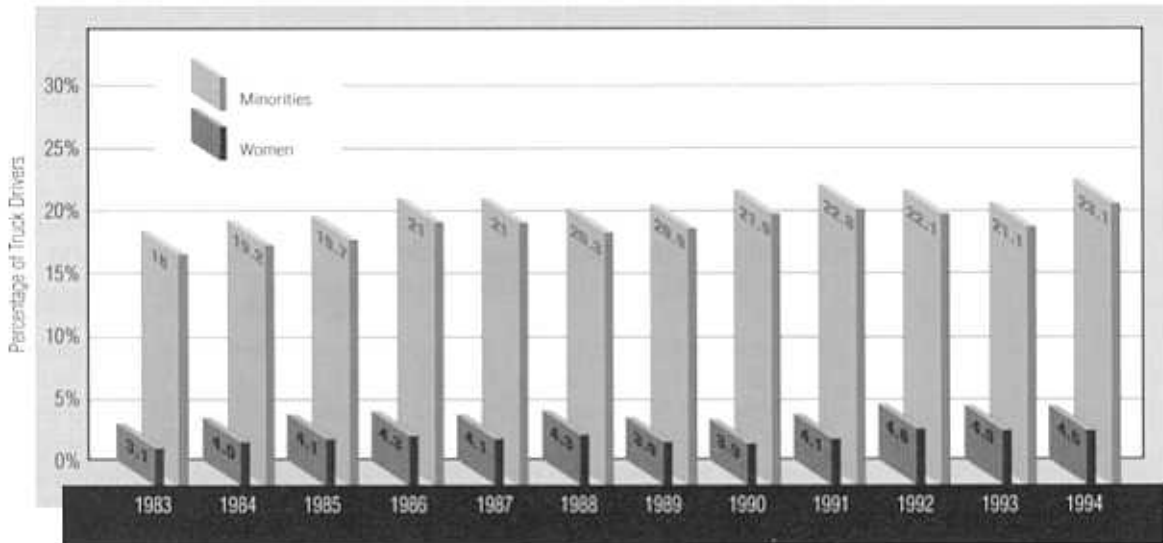


Sources and Notes:

U.S. Bureau of Labor Statistics, *Monthly Labor Review*, November 1995.

Figure 3

Percentage Share of Truck Drivers
Women and Minorities, 1983-1994



Sources and Notes:

American Trucking Associations, *Trucking Trends*, 1995 Edition

between 1982 and 1993. The traditional prime source of labor for the trucking industry, males aged 20 to 24, will also improve dramatically in the coming years. After showing an annual decline of 1.7% from 1982 to 1993, this strata of the labor force will increase by an average of 0.7% per year between 1994 and 2005. However, this figure still lags behind the 1.1% growth rate needed to keep pace with new truck driver job openings. The trucking industry showed moderate improvement in hiring more women and minorities from 1983 to 1994 (Figure 3). The percentage of minority truck drivers moved from 18.0% to 23.1%, while the female share of total drivers increased from 3.1% to 4.5%.

Impact of Competing Occupations on the Supply of Potential Drivers

Because no occupation draws from the labor market in isolation, the growth or reduction in "sister occupations" has an impact on the availability of potential truck drivers. One occupation that has traditionally

competed with truck driving for labor is the construction industry, which is quite comparable to trucking in terms of pay and educational requirements. The interviews Gallup conducted with trucking executives also highlighted the perception of construction as a major competitor of the trucking industry for available labor.

Fairly similar numbers of workers are employed in trucking and the construction trades, with the estimated cumulative growth rate in truck driving (12.8%) somewhat greater than that for construction workers (9.4%).

There has been little erosion in the relationship between trucking and construction wages, with construction continuing to pay higher wages. In 1983, the average hourly trucking wage of \$10.60 was 89% that of construction (\$11.94). Eleven years later, the average trucking hourly wage (\$12.83) was 87% of the construction wage (\$14.69).

Also during the interviews with trucking company executives, inadequate pay for truck drivers was cited quite often as a reason drivers leave the industry. As reported in *American Trucking Trends* (ATA, 1995 edition), the trucking industry's competitive advantage, in terms of employee earnings, has shrunk in comparison with the large manufacturing sector. In 1983, the average hourly trucking and courier wage was 1.24 times the average manufacturing rate—\$10.60 versus \$8.52. By 1994, the trucking and courier hourly rate had shrunk to only 1.12 times that of the manufacturing rate (\$12.83 versus \$11.43).

IV. HOW TRUCKING COMPANY EXECUTIVES VIEW DRIVER ISSUES – ALMOST ON THE MARK

The review of existing demographic information on the truck driver shortage was one of the two beginning points for this research project. The second was the qualitative, in-depth interviews conducted with 15 trucking company executives, each from a different firm. An important objective of this phase of the research was to obtain a picture of how trucking company executives view the driver shortage and related issues. The one to one-half hour interviews also provided insights for Gallup to use in designing the quantitative studies that followed.

Assessing the Driver Shortage

Most trucking company executives who were interviewed indicated that the current shortage of qualified truck drivers is moderate to severe. Several respondents emphasized that the shortage is not in the overall number of available candidates, but the number of qualified candidates. Two respondents believed that driver shortages in the industry were largely cyclical in nature and related to the overall business cycle, with boom times resulting in lower unemployment and a smaller pool of available candidates.

The executives agreed unanimously that among trucking industry segments, the long haul, full truckload segment suffers the most from the shortage of qualified drivers.

Eleven of the executives said the shortage of qualified drivers is more severe today than it was five years ago. Three more respondents thought that the problem is just as severe now as in 1991, while only one described the problem as being less severe today.

A wide variety of reasons was given for this shortage of qualified drivers, touching on many areas involving the drivers themselves, the trucking industry, and society at large. The reason the executives mentioned most frequently is the difficult lifestyle of (mostly long haul) truck drivers: the long, irregular hours; the poor living conditions on the road; and the large amounts of time away from home. Other frequently mentioned reasons include stricter regulations on safety and substance abuse; poor treatment by shippers, receivers and even trucking company personnel; and the generally poor image of the profession held by the general public.

Respondents also referred to demographic shifts and career paths in assessing reasons for the driver shortage. Many executives noted that the demographic group most likely to produce truck drivers in the past (young, white males) is getting smaller, forcing many companies to look to nontraditional sources. Also, several respondents expressed frustration at minimum-age requirements that keep companies from hiring drivers out of school and molding them into career drivers. These potential

drivers often choose other careers in the time between high school graduation and the point at which they turn 21 or 22 and become eligible to drive long haul routes across states.

Other reasons executives cited for the shortage include overall growth in the trucking industry, relatively low unemployment (which allows potential candidates to choose jobs that are closer to home), and a lack of truck driver training schools and funding for those schools.

Respondents also shared some of the negative consequences of the driver shortage that their companies have had to endure. These included trucks sitting idle, stunted company growth, and increased hiring and training costs.

Patterns in Driver Shortages

The executives agreed unanimously that among trucking industry segments, the long haul, full truckload segment suffers the most from the shortage of qualified drivers. In citing why this segment has been hit hardest, respondents once again touched on the "quality of life" on the road—extended time away from home, long and irregular working hours, and irregular routes.

The trucking executives interviewed said drivers seek several specific traits in a prospective employer. Two of the most frequently mentioned are stability and security—a financially stable company and a consistent workload and schedule.

Executives most often mentioned the Midwest as the region suffering the most from driver shortages, for two main reasons: 1) the region is a hub for the trucking and manufacturing industries, creating a very high demand for drivers; and 2) unemployment in that region tends to be lower than in other parts of the country. As was mentioned earlier, lower unemployment

creates other, more attractive job options for potential truck drivers. Some other respondents mentioned the eastern United States has been hardest hit, citing its strong economy; still others highlighted the Northeast because of its traffic congestion.

Drivers and Driver Needs

The trucking executives interviewed said drivers seek several specific traits in a prospective employer. Two of the most frequently mentioned are stability and security—a financially stable company and a consistent workload and schedule. Many respondents also mentioned a professional work environment in which drivers are treated with respect and shown how valuable they are to the company; modern equipment (which aids in job performance and self-esteem); and fair wages and benefits. Improved benefits, in fact, were viewed as having increased in importance over the past five years, coinciding with a more educated pool of drivers. Respondents said the desire to spend more time at home with families has also increased recently.

Not only did respondents assess the attributes drivers look for in companies, they also assessed the common traits and characteristics of drivers themselves. Quite often, respondents described the typical truck driver as someone who enjoyed working independently with little supervision, exhibited an adventurous spirit, and who did not have strong family obligations. Other characteristics that might attract people to truck driving include not being challenged in other jobs, a desire for the opportunity to make a good living, and a tendency to be comfortable around heavy machinery.

When asked which other industries draw upon the same pool of potential workers, all but two of the respondents mentioned construction. Both construction and trucking offer employees relative independence on the job and freedom to move from company to company. The one area in which construction was viewed as superior is "lifestyle" conditions, such as regular hours and more home time.

Assessing Driver Quality

Respondents were evenly divided on how driver quality has changed over the past five years: seven thought that driver quality had improved, seven thought that quality had worsened, and one said it has not changed. Any improvement was generally seen as stemming from better overall driver safety, mainly due to more stringent regulations regarding safety performance and substance abuse, and the use of modern technology in training and truck operations. Conversely, any degradation in driver quality was generally thought to be intrinsic to the drivers themselves; explanations included a decrease in driver qualifications and experience, poorer motivation, and naïve expectations surrounding the truck driving profession.

When discussing the quality of their own drivers, executives gave very similar responses to those regarding the overall quality of truck drivers in general.

Public Image

Executives were united in their belief that the image of truck drivers among the general public is unacceptably poor, which, as mentioned above, can contribute to driver attrition and a lack of new drivers entering the industry. The executives expressed concern that the public perceives truckers as substance-abusing, unprofessional cowboys who are more concerned about deadlines and deliveries than road safety. Executives acknowledged that this image is to some degree grounded in historical fact, but said it is not truly representative of the vast majority of today's drivers. Other reasons offered for this poor image include more trucks on faster-paced, congested highways, which often scares other motorists, and the media's overly negative portrayal of the industry.

... 80% of the public has a positive view of drivers of large trucks.

Despite this perceived negativity, many respondents believed that the image of truck drivers has improved over the past five years. Reasons cited include an improvement in the quality of drivers and the industry (higher safety standards and less substance abuse, for example) along with some concerted efforts to generate more positive publicity for the trucking industry (including national and regional advertising, community events, promotion of industry safety standards).

The executives indicated that their companies have a wide range of specific programs and policies in place to help improve the image of truck drivers. In fact, all respondents indicated that their company had many, not just one or two, image-enhancing policies in place. Among the more frequently mentioned are modern and well-maintained driver equipment; uniforms and appearance codes; strict safety regulations, including below-posted speed limits; and internal recognition and celebration programs for safe drivers.

Company Programs and Processes

Most company executives indicated that they use more than one or two methods as part of a comprehensive driver recruitment program. One of the more popular recruiting methods is referrals from current drivers, who generally receive bonuses for attracting qualified drivers. Other recruiting techniques included employing qualified regional recruiters; advertising on television, newspapers and billboards; attending trucking shows and job fairs; partnering with truck driver training schools; and offering competitive pay and benefits.

Once they have successfully recruited and hired their drivers, trucking companies must work hard to retain them the interviewees acknowledged. Accordingly, the executives interviewed tend to have very comprehensive retention policies, including creating a positive corporate culture in which the driver is treated as a valuable company member; constantly reviewing the needs and progress of drivers; offering competitive pay and benefits; and providing realistic opportunities for career advancement. The respondents' companies also recognize and reward drivers for loyalty, longevity and safety; address certain of their lifestyle concerns by, for example, ensuring regular routes and home time, and provide them with good equipment.

Most of the executives described the rather extensive driver training programs their firms offer, though some indicated that two to three days of orientation suffice as training (these companies tended to employ experienced drivers exclusively or have an owner-operator fleet). Some of the training programs mentioned cover all aspects of the driving experience, including paperwork, cargo loading and unloading, driving and driver professionalism. The executives also emphasized the importance of requiring road tests, in which drivers are teamed with an experienced driver and dispatched on extended road travel.

V. PUBLIC PERCEPTIONS OF TRUCK DRIVERS AND THE TRUCKING INDUSTRY – POSITIVE TO A POINT

How does the public view truck drivers and the trucking industry? To find out, Gallup polled a random sample of 1,000 adults in the continental United States.

General Image of Truck Drivers

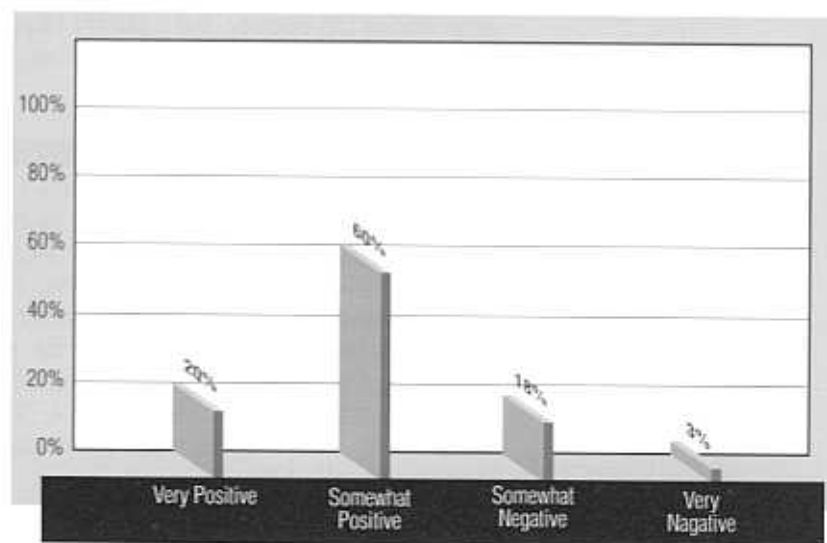
When asked for their spontaneous or off-the-top-of-their-head thoughts about truck drivers, most people surveyed responded with aspects of the job truck drivers do or with positive images about them, such as their being "hard workers," "good people," "good drivers," and "courteous." Few responded with negative descriptions.

As shown in Figure 4, across choices ranging from "very positive" to "very negative," 80% of the public has a positive view of drivers of large trucks. This positive percentage exceeds the expectations of the 15 company executives (see Section IV), who generally said the public's image of truck drivers is poor.

Twenty-four percent of adults now say their images of truck drivers is better today than it was five years ago, compared with 18% who say their image is worse today than five years ago. The remainder (58%) say their images are the same. The greatest positive shift has occurred among those ages 18-34, males, non-whites, and those in the South Central region. The three groups that indicated that their images of truck drivers are

Figure 4

Public Image of Truck Drivers



Sources and Notes:
The Gallup Organization, 1997.
"Don't Know" and "Refused" responses not included.
National Sample (n=971)

worse now than five years ago comprise those age 55 or older, females, and those in the Northeast.

The more positive perception of truck drivers among younger persons and ethnic minorities is a good sign for successful recruitment in trucking; the drop among females, however, is not.

Perceptions of the Truck Driver Personality

Among the six positive personality characteristics specifically related to driving, "friendly" (89%) earned the highest rating and "law-abiding" (75%) the lowest. In-between were "helpful," "professional," "safe," and "courteous." In response to an earlier question, the public said they believe that drivers are more concerned with deadlines than with safety. That, and the lower rating of "law-abiding" among the personality characteristics, suggests the public perceives that truck drivers may break traffic laws when work pressures demand it.

The characteristic which the public most said describes truck drivers is "independence." A very high 93% said the trait "definitely" or "probably describes" them, but most notably it received by far the highest "definitely describes" rating – 43% – of any of the characteristics listed. Only 7% said being independent "probably does not" or "definitely does not" describe truck drivers. Because independence is a highly valued characteristic in US society, the industry should capitalize on this strong public perception in recruiting and retaining drivers.

Areas the Public Says Need Improvement

The public respondents were asked to indicate the degree to which they believe various undesirable behaviors occur frequently among drivers of large trucks. Nearly two-thirds (64%) agreed that truck drivers excessively exceed the speed limit frequently. For six behaviors listed in the survey, between 17% and 28% of the public said the behavior occurs frequently. In order, these behaviors are: "reckless driving" (28%), "disregard for the rights of others" (28%), "high on drugs" (21%), "drunkenness" (18%), "stealing from one's company" (18%), and "physically fighting with others" (17%).

These numbers show that while the public generally has a positive view of truckers, there is an underlying belief that a noticeable number engage in undesirable behavior in the areas of drugs, drinking, violence, and recklessness. Efforts to counter these perceptions would help improve the image of truck drivers.

Also, the public definitely believes truckers disobey speed limits. This viewpoint also echos that expressed in response to the question about choosing safety versus deadlines and in the comparatively low rating of "law-abiding" among truckers' personality characteristics. Thus, the image of truck drivers in this area needs to be addressed.

Public Perceptions about Driver Training and Women Drivers

Most adults believe truck drivers receive adequate training. However, fewer say this is definitely true (22%) than probably true (52%). Also, a significant minority (27%) thinks truck drivers do not receive adequate training.

About two-thirds (65%) of the respondents agreed that "the industry needs to recruit more women drivers." Twenty percent agreed this is definitely true, while 45% agreed it is probably true.

The two groups that least agreed with the statement that "the industry needs to recruit more women drivers" are persons aged 55 or older (54%) and, interestingly, women themselves (59%). The latter result suggests that when recruiting women, trucking companies encounter resistance more from women themselves as potential applicants than from current societal sentiment.

VI. WHAT KEEPS DRIVERS ON THE JOB – THE RETENTION MODEL

Satisfied drivers mean less turnover for a trucking company and for the industry as a whole. To identify the factors that make truck drivers satisfied, Gallup researchers interviewed 801 drivers who have been with their current company five years or more. The assumption was that these long-tenured drivers have remained with their employers because they are more satisfied with the company. The objectives of the research were to identify the aspects of their jobs that most account for drivers' satisfaction and the nature of their commitment to truck driving as a profession.

Twenty trucking companies provided Gallup with the names of drivers who have been employed with them five or more years. Gallup then randomly contacted these long-tenured drivers. Some of the drivers were interviewed at the time they were called; others used a toll-free number to call Gallup at a time convenient for them to complete the interview.

Satisfaction with Trucking as an Occupation

How satisfied are long-tenured drivers with trucking as an occupation? Most (86%) say they are either "very satisfied" (43%) or "somewhat satisfied" (43%). This is a very high level of satisfaction; however, because of the design of the research (interviews with drivers who have been with their company five or more years) this high level was expected.

The interviews revealed that the longer their tenure, the more satisfied the drivers: 46% of those who have been drivers for 15 years or more are "very satisfied," compared to 36% for those who have driven for less than 15 years. Also, although the finding is not statistically significant at the 95% level of confidence, female truck drivers show greater satisfaction with truck driving as an occupation than do male truck drivers. Fifty-nine percent said they were "very satisfied," compared to 42% of male drivers.

Commitment to Truck Driving

Commitment represents a higher level of loyalty to the profession than does satisfaction, and while persons can be satisfied with their jobs, they may or may not feel committed to them. Obtaining commitment among workers should be a goal for the trucking industry because it leads to high retention and helps create a positive image for the occupation in society.

Two questions covering commitment were asked in the interviews. The first question was:

If you had it to do over again, would you say you would definitely, probably, might, probably not, or definitely not choose truck driving as an occupation?

The second question was:

How do you feel about recommending truck driving as an occupation to your family and friends? Generally, would you say you would definitely, probably, might, probably not, or definitely not recommend it?

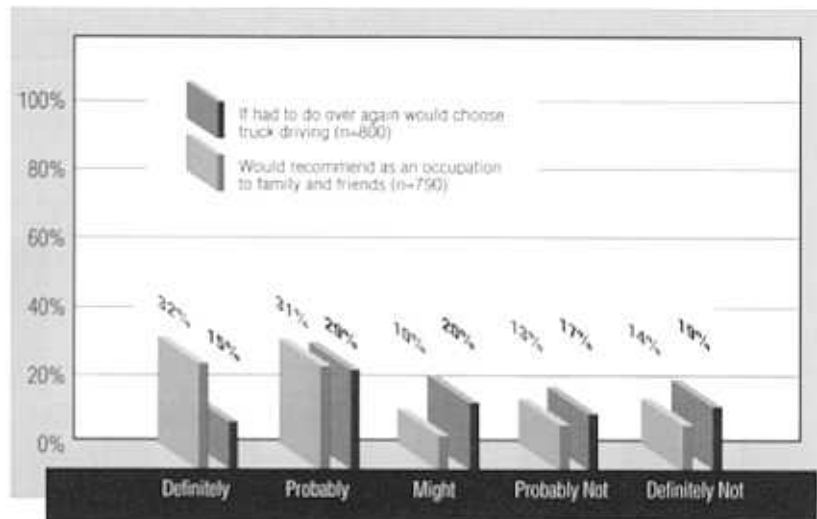
The answers to both of these questions reveal that the commitment of long-tenured drivers to the profession is not as great as their satisfaction on the job. As shown in Figure 6, 63% say they "definitely" or "probably" would choose truck driving again. Compared with the 86% who said they are "very" or "somewhat" satisfied with their job. A sense of commitment dropped further in response to the second question above, to which only 44% answered "definitely" or "probably."

While the commitment percentages are relatively high, the industry would be better served if they were higher. For example, if more truck drivers felt positively about recommending truck driving as an occupation, recruitment would be easier.

Females, non-whites and those who have been drivers less than 15 years were significantly more likely to say they would choose truck driving again than were males, whites, and those who have been drivers

Figure 5

Driver Commitment to Occupation

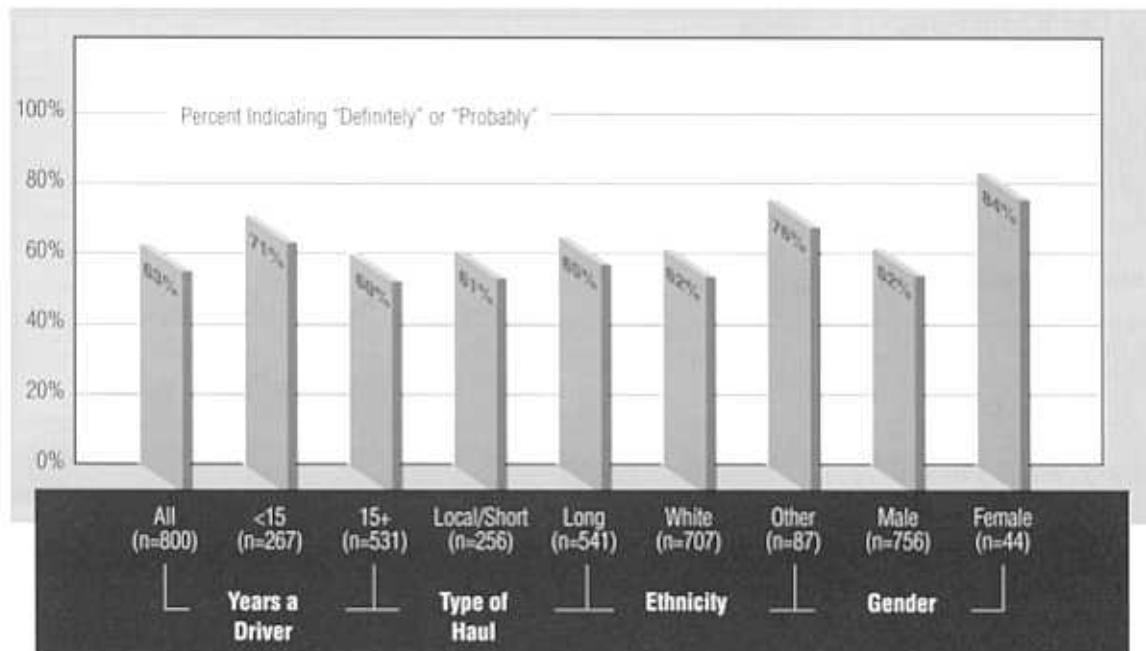


Sources and Notes:
The Gallup Organization, 1997.
"Don't Know" and "Refused" responses not included.

Females, non-whites and those who have been drivers less than 15 years were significantly more likely to say they would choose truck driving again than were males, whites, and those who have been drivers 15 years or more. This suggests that females, minorities and younger people are the groups most likely to see trucking as a good occupational choice.

Figure 6

Would Choose Truck Driving Again *By Driver Characteristics*

**Sources and Notes**

The Gallup Organization, 1997

"Don't Know" and "Refused" responses not included.

15 years or more. This suggests that females, minorities and younger people are the groups most likely to see trucking as a good occupational choice (see Figure 6).

... it appears females and minorities are also more likely to recommend truck driving as an occupation than their male and white counterparts.

Although the findings are not significant at the 95% level of confidence, it appears females and minorities are also more likely to recommend truck driving as an occupation than their male and white counterparts. This suggests that female and minority drivers view truck driving's social status as being higher than do male and white drivers. Trucking is not only a good choice for them, but is also a profession they would be more likely than other truckers to recommend to their family and friends (see Figure 7).

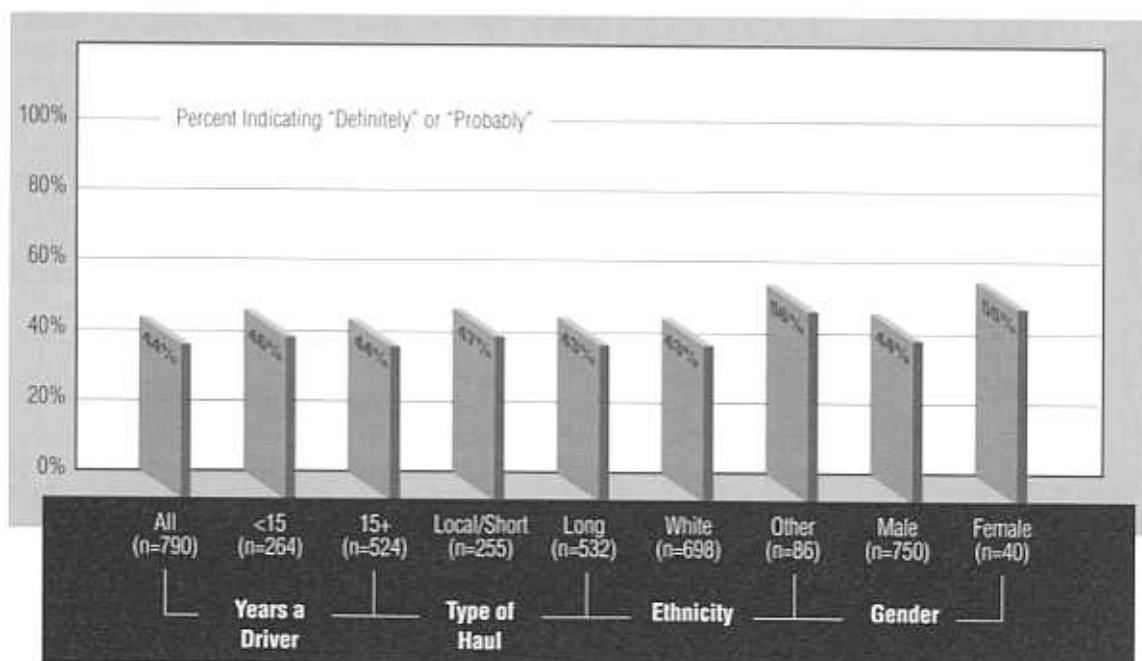
Satisfaction with Aspects of the Industry

The drivers were asked to rate a number of the industry's characteristics. Among these were the pay drivers receive, the freedom truckers have to be on their own and the public's attitude toward truck drivers.

A majority (59%) of the drivers said they are "very" or "somewhat" satisfied with the pay truck drivers receive; only 19%, however, say they are "very" satisfied.

Figure 7

Would Recommend Truck Driving as an Occupation to Family and Friends By Driver Characteristics



Sources and Notes:

The Gallup Organization, 1997.

"Don't Know" and "Refused" responses not included.

A very large proportion (89%) said they are "very" or "somewhat" satisfied with the freedom truckers have to be on their own, with most (61%) saying they are "very satisfied." In contrast, 73% said they are "very" or "somewhat" dissatisfied with the public's attitude toward truck drivers. This perception stands in sharp contrast to the results from Gallup's public attitude survey, in which 80% of the respondents said they have a "very" or "somewhat" positive attitude toward truck drivers.

While there is room for improvement in terms of how the public perceives truck drivers, particularly by moving more people from a "somewhat" to a "very" positive viewpoint, clearly drivers are unaware of the generally positive light in which the public holds them. Drivers need to know that the public's attitude toward them is mostly positive. It may be that the minority of respondents who think negatively of truckers are also more vocal than their positive-thinking counterparts, thereby disproportionately contributing to the perceptions drivers hold.

How Long-Tenured Drivers Define Their Work

The long-tenured drivers were asked to rate their level of satisfaction on 21 job attributes. A data reduction analysis revealed that these attributes fall into four categories, which make up the factor groups the drivers used to define their work world. These are:

- Company Support
- Non-Driving Activities and Customer Friendliness
- Hours of Work and Time with Family
- Work Rewards

The job attributes that comprise each of these factor groups are shown below. In each group the attributes are ranked in order from that receiving the highest "very satisfied" rating to that receiving the lowest "very satisfied" rating.

Nine of the 21 job attributes fall into the Company Support factor group. These attributes, along with the percentage of drivers who said they are "very satisfied" with their company regarding each one, are:

- "Support from the company when on the road" (52%)
- "Friendliness of managers" (52%)
- "Company expectations about schedules" (46%)
- "Fairness of managers" (44%)

- "Company rules about driving" (42%)
- "Genuine care of managers" (42%)
- "How dispatcher assigns work" (41%)
- "Recognition when drivers do a good job" (35%)
- "Company training program" (34%)

As shown above, the attribute receiving the lowest rating among the Company Support factors is "Company training programs." Since training results in safety on the road—an important issue among the public—as well as improved job performance, trucking companies should consider further development in this area.

Some ideas for improvement were provided by the drivers in the survey. Positive comments about their company's current training program are "safety issues" (21%), "gain knowledge" (21%), "good system" (15%), "very thorough" (11%), "personal training" (10%), "on-going training" (7%) and "good trainers" (7%).

Five of the 21 job attributes fall into the Non-Driving Activities and Customer Friendliness factor group. These attributes, along with the percentage of drivers indicating they are "very satisfied" with them, are:

Drivers need to know that the public's attitude toward them is mostly positive.

- "Amount of physical loading and unloading have to do" (42%)
- "Amount of general non-driving work have to do" (37%)
- "Friendliness of customers" (35%)
- "Hours of service recording have to do" (26%)
- "Amount of waiting time at customer locations" (23%)

The ratings are lower in this factor group than in the Company Support group. Trucking companies can raise the job satisfaction of their employees by improving the employees work situation and nature of their involvement with the non-driving activities above. However, as will be shown, this factor group is not as important to overall job satisfaction as the other factor groups.

The Hours of Work and Time with Family factor group includes three attributes. These attributes, along with the "very satisfied" ratings for each, are:

- "Hours of work" (32%)

- "Time can be home with family" (30%)
- "Time spend on the road" (29%)

The remaining four attributes fall into the Work Rewards factor group. These attributes and the percentage of drivers indicating they are "very satisfied" with each of them are:

- "Steadiness of the work" (60%)
- "Benefits" (40%)
- "Friendliness of other company drivers" (38%)
- "Pay" (29%)

These four attributes are the traditional personnel categories for work. Along with the Company Support factors, the long-tenured drivers generally rate these traditional job attributes higher on the satisfaction scale.

Job Factors that Most Influence Overall Satisfaction

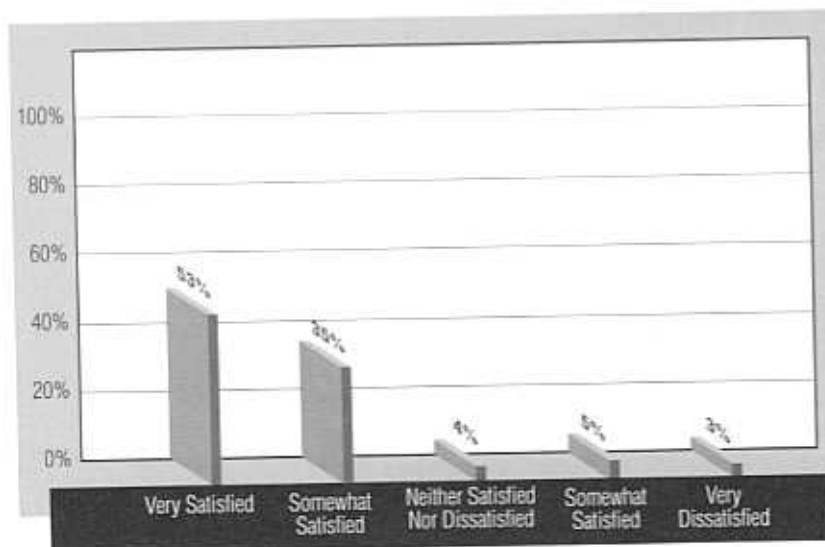
Which of the four factor groups and which of the specific job attributes

should trucking companies focus on to improve driver satisfaction? Gallup conducted multiple regression analyses to answer this question. These analyses consider the impact of all the factors and attributes by simultaneously looking at how they correlate with overall satisfaction. Those with the highest independent correlations are the most important ones to consider because they best explain overall satisfaction.

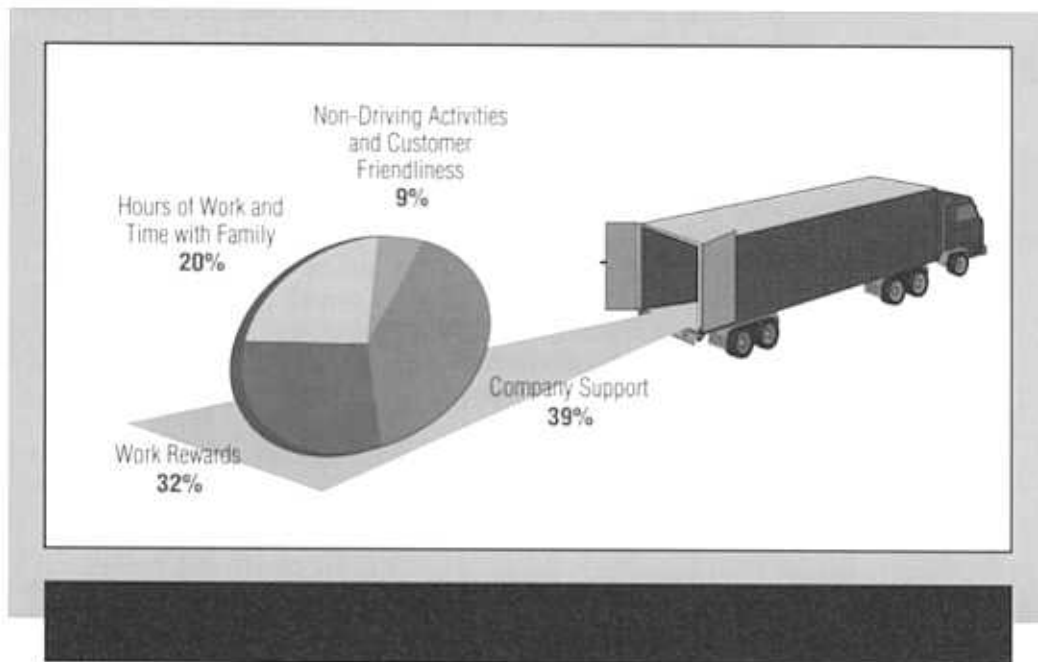
Figure 8 shows the level of overall satisfaction the long-tenured drivers said they have for their current job. Similar to the ratings for overall satisfaction with truck driving, this

Figure 8

Overall Satisfaction with Truck Driving Job



Sources and Notes:
The Gallup Organization, 1997.
"Don't Know" and "Refused" responses not included.
(n=801)

Figure 9***Influence of Factor Groups on Satisfaction with Current Job*****Sources and Notes:**

The Gallup Organization, 1997.

The above percentages are derived from taking the regression coefficients for each factor group, summing them, and then scaling that total to 100%.

rating is very high. A full 88% (compared to 86% under the trucking satisfaction question) say they were "very" or "somewhat" satisfied with their current job. An even greater proportion is "very" satisfied with the job than with trucking as a career (53% versus 43%).

Figure 9 shows the results of the regression analysis relating the four factor groups to overall satisfaction with one's current job. These results identify the opportunities for companies to improve overall job satisfaction as regards each factor group. The biggest payoffs will occur by improving satisfaction in the Company Support (39%) and Work Rewards (32%) factor groups. Next in importance is the Hours of Work and Time with Family (20%) factor group. Least important is the Non-Driving Activities and Customer Friendliness (9%) factor group.

The biggest payoffs will occur by improving satisfaction in the Company Support (39%) and Work Rewards (32%) factor groups. For example, a one-percent increase in driver satisfaction with Company Support will result in an increase of just over one-third of a percent (.39) in overall satisfaction.

These percentages indicate the approximate proportional increase in overall job satisfaction that will occur with a one-percent improvement in satisfaction with the attributes in the factor group. For example, a one-percent increase in driver satisfaction as a result of Company Support will bring about an increase of just over one-third of a percent (.39) in overall satisfaction. In contrast, a one-percent increase in satisfaction with Non-Driving Activities and Customer Friendliness will result in an increase of less than one-tenth of a percent (.09) in overall satisfaction. The specific job attributes that are included under each of these factor groups, as well as the current level of satisfaction with each, are shown on page 25 and 26.

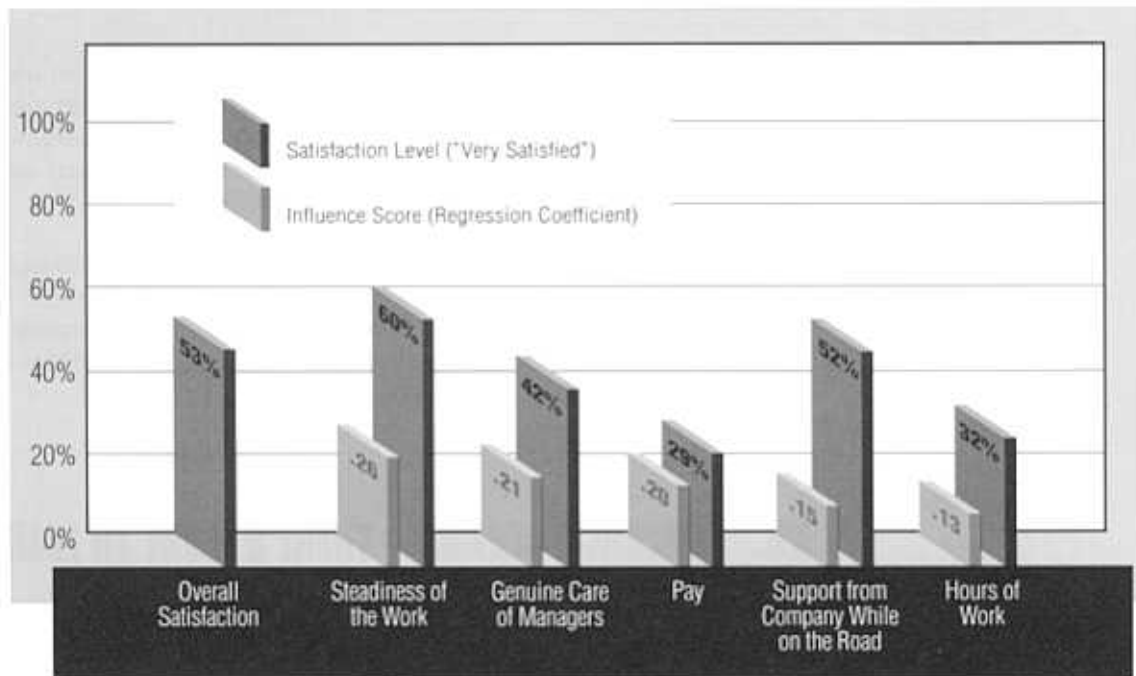
While analyzing individual factor groups allows companies to focus on particular areas in order to improve overall satisfaction, it does not identify the most important specific attributes within those groups. To accomplish this, Gallup conducted a multiple regression analysis relating all of the job attributes separately to overall satisfaction (see Figure 10).

From that analysis, five specific job attributes emerge as the most important predictors of overall satisfaction: "Steadiness of the work," "Genuine care of managers," "Pay," "Support from company while on the road" and "Hours of work." "Steadiness of the work," with a regression coefficient of .26, is the most important of these five. However, all five are important relative to the full list of job attributes considered in the study.

Two of the selected attributes ("Genuine care of managers" and "Hours of work") have moderate correlations with some of the other attributes. Though the study team adjusted these attributes, it should be noted that "Friendliness of managers" and "Fairness of managers" are reasonable substitutes for "Genuine care of manager," while "Time can be home with family" and "Time spend on the road" are reasonable substitutes of "Hours of work." This means that, as a predictor of overall satisfaction, "Genuine care of managers" can be taken to mean managers who care and are friendly and fair, while "Hours of work" represents a balance between hours of work, time on the road, and time with family.

... five specific job attributes emerge as the most important predictors of overall satisfaction: "Steadiness of the work," "Genuine care of managers," "Pay," "Support from company while on the road" and "Hours of work." "Steadiness of the work," is the most important of these five.

The study team interpreted the regression coefficients for the 21 attributes in the same way it interpreted the factor group percentages. For example, a one-percent increase in satisfaction with "Steadiness of the work" results in an increase of approximately one-quarter of a percent (.26) in overall satisfaction with the job, while a one-percent increase in "Hours of work" accounts for an increase of half (.13) as much in overall satisfaction.

Figure 10***Attributes that Most Influence Long-Term Drivers' Overall Satisfaction with Current Job*****Sources and Notes:**

The Gallup Organization, 1997.

The 21 attributes shown in the factor analysis were included in this regression analysis.

The five shown above best predict overall satisfaction with one's current job.

Also shown in Figure 10 are the "very satisfied" percentages for overall satisfaction and each of the selected job attributes. "Steadiness of the work," which is the most important job attribute, is at 60%, while "Hours of Work" is at 32%.

Gallup also asked drivers to name the main things their employer does that keep them with the company. Up to three answers were allowed, and those the most frequently mentioned were:

- "Good pay" (33%)
- "Steady work" (24%)
- "Good equipment" (18%)

-
- "Able to spend more time at home" (18%)
 - "Good benefits" (15%)
 - "Good company attitude/friendly" (13%)

These answers generally confirm the results of the regression analysis on the job attributes. However, "Good Equipment," while not included among the attributes rated using the satisfaction scale, emerges as a main item among those mentioned by the drivers and should also be considered important in affecting overall satisfaction.

This analysis of factor groups and job attributes and their influence on overall satisfaction highlights areas and attributes that will most effectively improve overall satisfaction among drivers. In turn, improved overall driver satisfaction should lead to higher retention for individual trucking companies and the industry as a whole.

VII. RESEARCH AGENDA – THERE'S MORE TO LEARN

It is recommended that a study of drivers who are new to a company be conducted to determine whether the job attributes important to them are similar to or different from those of long-tenured drivers.

Also, a general study on driver commitment to the industry should be conducted. This topic was touched on in the study of long-tenured drivers. However, since commitment has a strong relationship to retention and recruitment in the industry, it warrants a separate study.

Do the continuing programs and efforts of trucking companies and the industry to improve the image of the profession have an impact on public perceptions? This question can best be answered by repeating the public attitude survey every two-three years.

Lastly, the demographic data relevant to assessing the driver availability issue should be reviewed and reported on every three-five years.

American Trucking Associations Foundation
2200 Mill Road
Alexandria, Virginia 22314
Reorder #: C0926