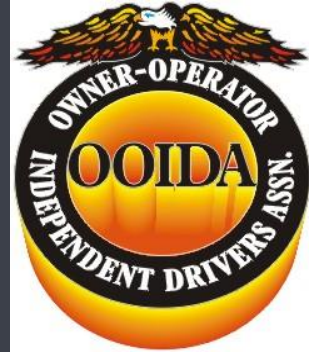




OOIDA Foundation
RESEARCH • SAFETY • EDUCATION



OOIDA

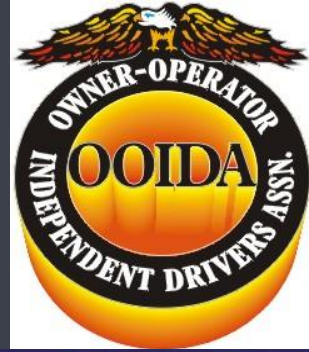
To participate in today's program,
text DEES009
to 22333

Or scan this code



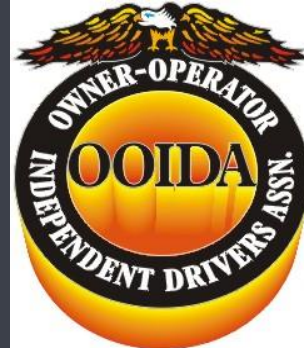


OOIDA Foundation
RESEARCH • SAFETY • EDUCATION



OOIDA





To START:

OPEN a new text message

In the TO: section of your text messaging, text
the number 22333

In the body of the message, type in
Dees009

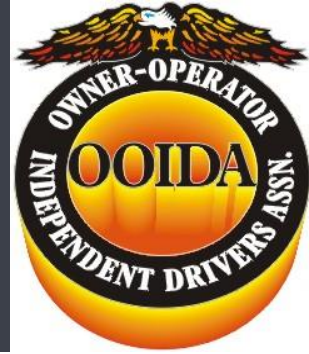
(Not case sensitive)

The OOIDA logo is the word "OOIDA" in a bold, black, serif font.

To participate in today's program,
text DEES009
to 22333

Or scan this code





Rules:

Interactive Introduction

Educational

Entertaining

Engaging

The OOIDA logo is the word "OOIDA" in a bold, black, serif font.

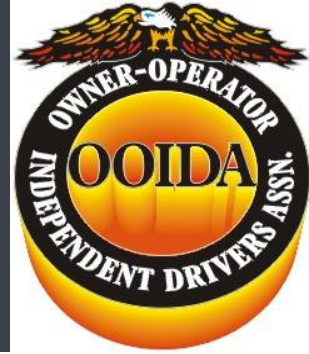
To participate in today's program,
text DEES009
to 22333

Or scan this code





OOIDA Foundation
RESEARCH • SAFETY • EDUCATION



Rules:

Interactive Introduction

Educational

Entertaining

Engaging

Ask for a volunteer

To participate in our survey program,
text OOIDA009
to 22333

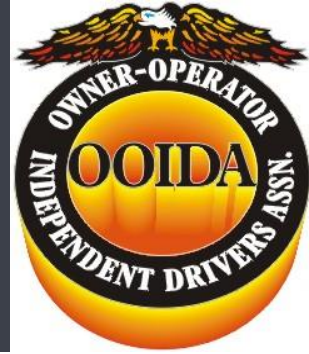
Or scan this code



OOIDA



OOIDA Foundation
RESEARCH • SAFETY • EDUCATION



Rules:

Interactive Instruction

Educational

Entertaining

Engaging

OOIDA

Ask for a volunteer

**Happy Birthday MOM!
(Ann)**

**Text her and tell her I love
her!**

870-476-6428

to participate in our program,
text #EE009
to 22333

scan this code





Who is in the audience?

In one word (or a hyphenated phrase) –

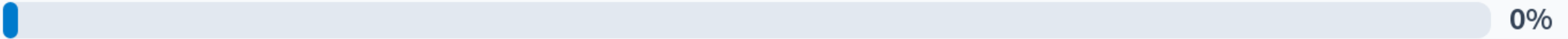
What part of the transportation industry do you represent?

In one word or-a-phrase -- what part of the transportation industry do you represent?

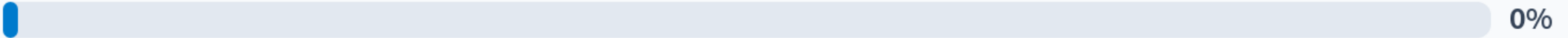
Nobody has responded yet.

Hang tight! Responses are coming in.

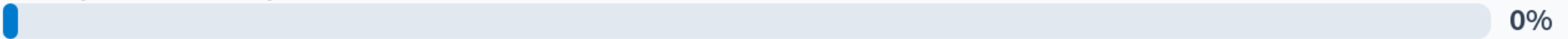
stands for Owner Operator International Drivers Association



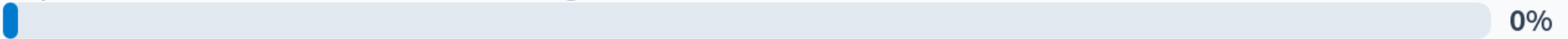
was formed by truckers as a result of OPEC oil embargoes



is 50 years old this year



represents the interests of truck fleets regardless of size



is an international association with more than 150,000 members





The Correct Answer is!

A is the only answer that is not correct.

The mission of OOIDA is to advocate for truckers everywhere, with an office in DC and a team at the HQ in Grain Valley working to aggressively represent the views on regulatory and legislative issues to lawmakers in DC and across the country.

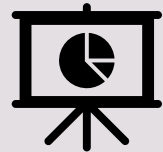
Access to meaningful resources & information to help Owner Operators and Motor Carriers be successful in business

Exclusive benefit programs

Members savings on products and services

Education and Research

501(c)(3)



- - Professional Driver's Perspective

OFFERINGS

EDUCATION

- Educational Videos
- YouTube channel
- Truck To Success
- Dispatches
- White papers
- Mary Johnston
Scholarship -1998
(\$430K awarded)

RESEARCH EDUCATION HYBRID

- Results from surveys drive change
- Monthly Market Update
- Only research with data from professional driver perspective
- All Drivers - OO - small fleets - employee drivers – LO

RESEARCH

- Surveys
 - PED
 - OO
 - Numerous others

Reviewing other data from other sources relevant to transportation



Participates in...



Dedicated Truck Lanes
Feasibility Study Consultant Team



Transportation, Warehousing & Utilities Sector Council





Fleet Size – ORAL QUIZ

There are all different sizes and types of fleets, rank in order from most common to least common the following fleet sizes:

Fleets more than 100 trucks

Fleets of 11 to 100 trucks

Fleets of 3 to 10 trucks

Fleets of 2 trucks

Fleets of only 1 truck

Answer out loud: What is the most common size of fleet?

Happy Birthday MOM!

(Ann)

Text her and tell her I love
her!

870-476-6428



Fleet Size – SHOW OF HANDS

There are all different sizes and types of fleets, rank in order from most common to least common the following fleet sizes:

Fleets more than 100 trucks

Fleets of 11 to 100 trucks

Fleets of 3 to 10 trucks

Fleets of 2 trucks

Fleets of only 1 truck

Answer out loud: What is the most common size of fleet?

Happy Birthday MOM!

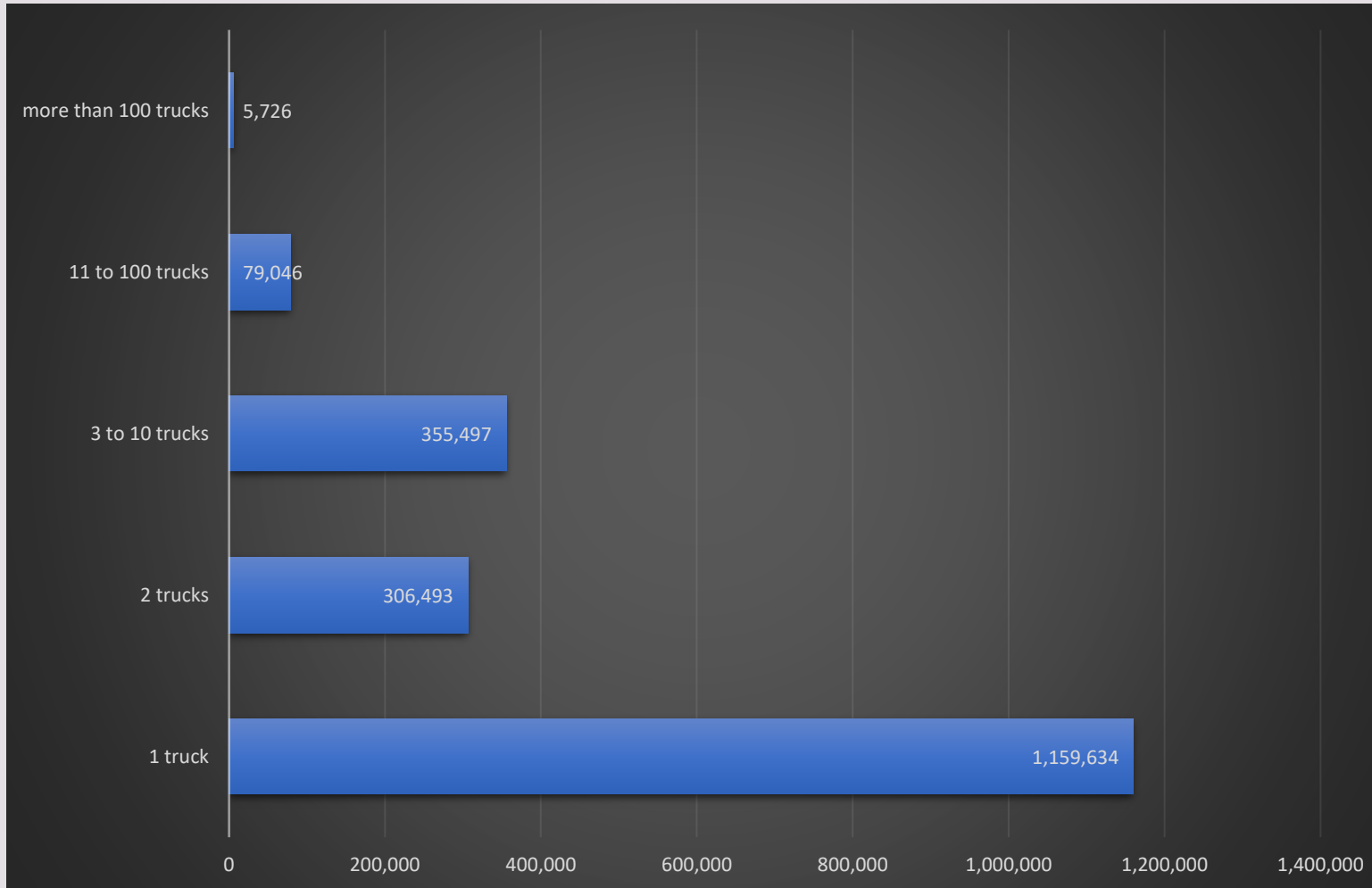
(Ann)

Text her and tell her I love
her!

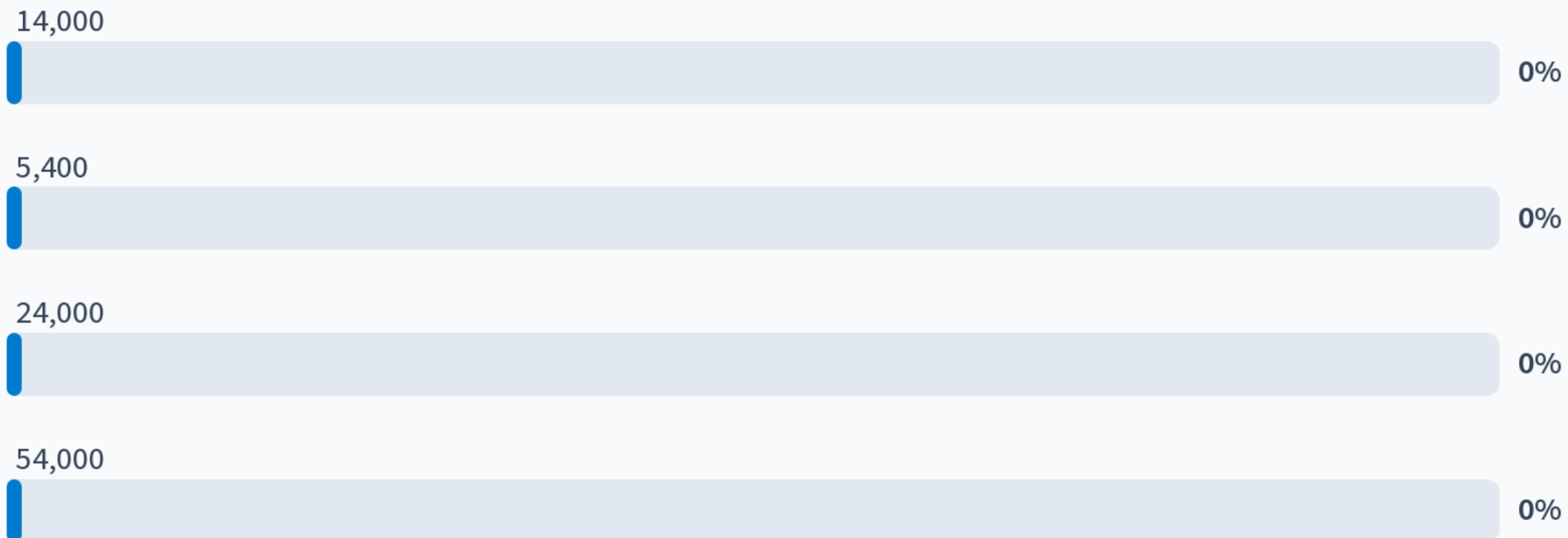
870-476-6428



Fleet Size



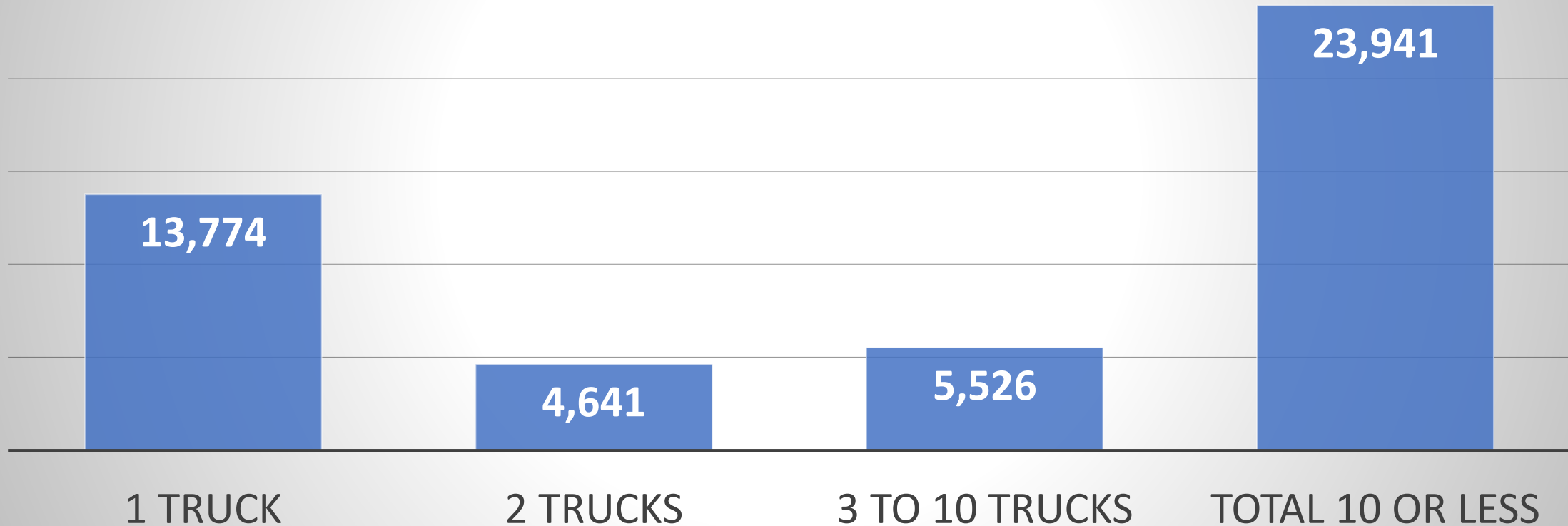
The approximate number of truck fleets operating less than 11 trucks in Iowa is :





Iowa \leq 10 truck fleets?

10 or fewer trucks operating in Iowa





RESULTS of Surveys from OOFI

CREATE A PROFILE/VOICE OFTEN OVERLOOKED POPULATION

The largest not-for-profit international trade association representing the interests 150,000 small business owners and professional drivers

1. Company drivers – PED Surveys
2. Majority members - Owner Operator Surveys

1. operating own authority
2. Leased on to a MC

OOFI first survey 1998 – continuous since

Majority of researchers do not have access to owner-operator population

What's different:

- Collects
- Analyzes
- Critical data from this population of drivers
 - Not large fleets
 - Not safety directors/managers
 - Not management

BUT THE DRIVER



Employee Driver OR Owner Operator

PHYSICAL CHARACTERISTICS



Employee Driver a/k/a Company Driver

Owner Operator

Caucasian

Caucasian

Male

Male

58 years old

59 years old

221 pounds

224 pounds

5'10"

5'10"

BMI = 31.6

BMI = 32.1



Employee Driver OR Owner Operator

DIFFERENT TYPES

Employee Driver a/k/a Company Driver

36% drive for a Motor Carrier that operates 20 trucks or less

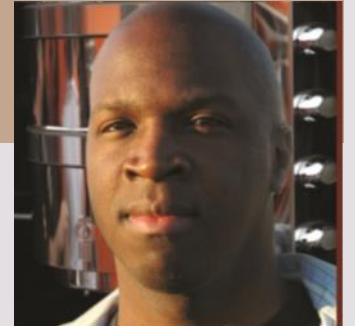
43% drive for carriers with 100 trucks or more

96% of the trucking industry is comprised of carriers with 20 or fewer trucks

Owner Operators can be divided into 2 types:



Owner Operator under Own Authority



Leased on to another carrier's authority



Employee Driver vs. Owner Operator

WORK EXPERIENCE – MAINLY BLUE COLLAR



- construction
- factory work
- farming
- law enforcement
- Military (35%)
- 29 average age entering trucking industry
- Most have been driving a truck 30 years
- Has Changed carriers 7 times for
 - more home time
 - better pay
 - better miles

- Farming
- construction
- Manufacturing
- Upbringing – multiple generation truckers
- Military (32%)
- 29 average age entering trucking industry
- Driving a truck 30 years
- Owner operator for 20 years
- 2.8 M miles of driving, most without DOT reportable accident.
- Usually owns 1 to 2 trucks
- Owns at least 1 trailer
- The number of small fleets increased from 2% in 2016 to 5% in 2022



Employee Driver vs. Owner Operator

WORK EXPERIENCE – MAINLY BLUE COLLAR

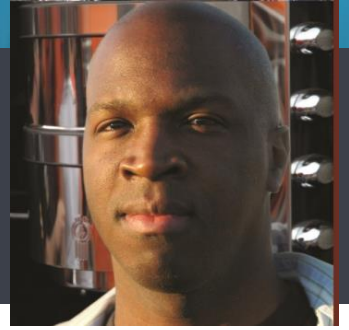


- construction
- factory work
- farming
- law enforcement
- Military (35%)
- 29 average age entering trucking industry
- Most have been driving a truck 30 years
- Has Changed carriers 7 times for
 - more home time
 - better pay
 - better miles

- Farming
- construction
- Manufacturing
- Upbringing – multiple generation truckers
- Military (32%)
- 29 average age entering trucking industry
- Driving a truck 30 years
- Owner operator for 20 years
- 2.8 M miles of driving, most without DOT reportable accident.
- Usually owns 1 to 2 trucks
- Owns at least 1 trailer
- The number of small fleets increased from 2% in 2016 to 5% in 2022



Greatest Challenges?

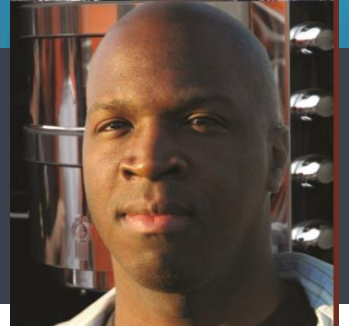


Regulations/Government
Fuel prices
Freight rates
High maintenance costs
Parking
Road conditions
ELDs
Detention
Congestion
Lack of qualified drivers

Regulations/ Government
Fuel Prices
Low wages
High maintenance costs
Parking
Road conditions
ELDs
congestion



Greatest Challenges?



Regulations/Government

Fuel prices

Freight rates

High maintenance costs

Parking

Road conditions

ELDs

Detention

Congestion

Lack of qualified drivers

Regulations/ Government

Fuel Prices

Low wages

High maintenance costs

Parking

Road conditions

ELDs

congestion

OO Greatest Challenges



Both LO and OO named regulations as a challenge, but the number of regulations that those with their own authority have to comply with is much greater (paperwork, taxes, permits, licenses, insurance, etc.)

Takeaway - regulations that impact small carriers much differently than larger carriers.

“Mismatched government regulation. Safety is absolutely paramount. However, the individual or small fleet owner is at risk by being required to provide equal expense to ensure compliance as the major carriers. There’s no consideration made to varying fleet size as to cost incurred for ensuring compliance or the same with regard to cost of violations of compliance.”

Greatest Challenges Quote



Both LO and OO named regulations as a challenge, but the number of regulations that those with their own authority have to comply with is much greater (paperwork, taxes, permits, licenses, insurance, etc.)

Takeaway - regulations that impact small carriers much differently than larger carriers.

“Mismatched government regulation. Safety is absolutely paramount. However, the individual or small fleet owner is at risk by being required to provide equal expense to ensure compliance as the major carriers. There’s no consideration made to varying fleet size as to cost incurred for ensuring compliance or the same with regard to cost of violations of compliance.”

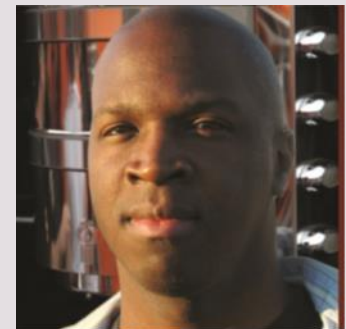
Greatest Challenges Take away & quote



Both LO and OO named regulations as a challenge, but the number of regulations that those with their own authority have to comply with is much greater (paperwork, taxes, permits, licenses, insurance, etc.)

Takeaway - regulations that impact small carriers much differently than larger carriers.

*“Mismatched government regulation. **Safety is absolutely paramount.** However, the individual or small fleet owner is at risk by being required to provide equal expense to ensure compliance as the major carriers. There’s no consideration made to varying fleet size as to cost incurred for ensuring compliance or the same with regard to cost of violations of compliance.”*



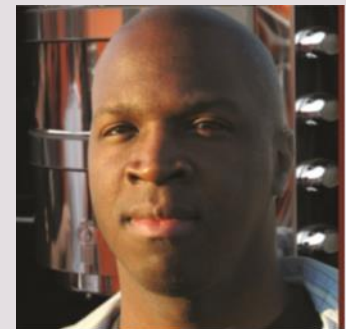
Greatest Challenges Take away & quote



Both LO and OO named regulations as a challenge, but the number of regulations that those with their own authority have to comply with is much greater (paperwork, taxes, permits, licenses, insurance, etc.)

Takeaway - regulations that impact small carriers much differently than larger carriers.

*“Mismatched government regulation. **Safety is absolutely paramount.** However, the individual or small fleet owner is at risk by being required to provide equal expense to ensure compliance as the major carriers. There’s no consideration made to varying fleet size as to cost incurred for ensuring compliance or the same with regard to cost of violations of compliance.”*





I drive a truck because...it's a *career* not a job!

COMPARING VARIOUS YEARS OF OOFI SURVEYS (2007-2023)

All I ever wanted to do – 15%

Love it/enjoy it – 18%

Freedom/adventure/own boss – 30%

It pays the bills – 18%

Multiple generation trucker – 8%

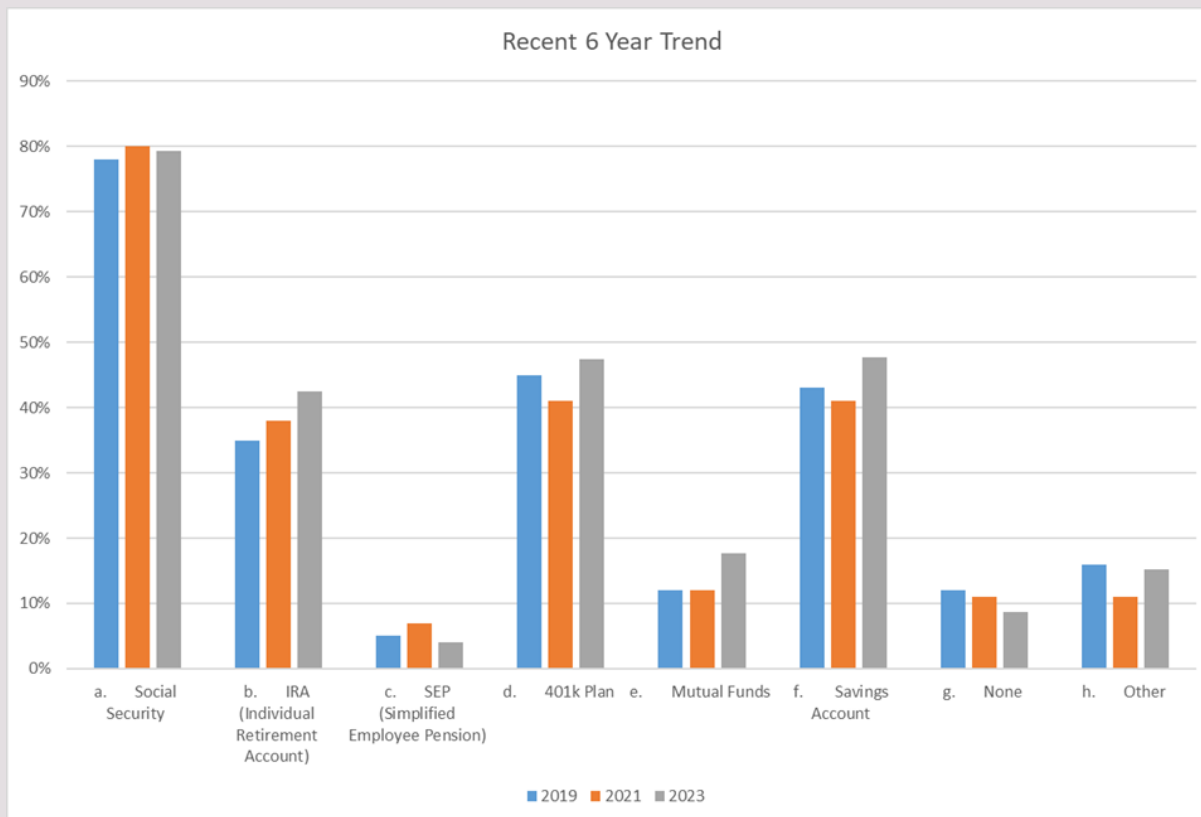
Other (ten words or less) – 11%





Retirement Planning – PED

COMPARING VARIOUS YEARS OF OOFI SURVEYS





Drivers are more educated

PED SURVEY COMPARISON FROM 2007 - 2023

- Fewer and fewer have less than 12 years of high school
- Fewer and fewer drivers with only HS diploma
- More and more have advanced education
 - More college graduates
 - Supplementing college hours beyond degrees
 - More with advanced degrees
- More women entering the industry



Hope for tomorrow's drivers

PED SURVEY COMPARISON FROM 2007-2023

Happy Birthday Mom!
870-476-6428

Slight uptick in drivers encouraging their children to become a truck driver in recent years from 28% up to 40%

Slight decrease in “no” responses from 72% down to 60%.

Seems more are being encouraged to become a truck driver while less are being diverted away from the career by parents.

Is this the result of an increase in benefits packages for employee drivers?

monthly premiums for health insurance decreases from mean of \$330.14 (2017) to mean of \$261.16(current)

- these numbers could be skewed by outliers (would employee drivers have extremely high or low health insurance premiums).
- A more appropriate representation may be the median in 2017 (\$219.50) decreased in 2023 (\$194).

Fewer drivers are smoking. Regular exercise is on the incline.



Hope for tomorrow's drivers

PED SURVEY COMPARISON FROM 2007 - 2023

Slight uptick in drivers encouraging their children to become a truck driver in recent years from 28% up to 40%

Slight decrease in “no” responses from 72% down to 60%.

Seems more are being encouraged to become a truck driver while less are being diverted away from the career by parents.

Is this the result of an increase in benefits packages for employee drivers?

monthly premiums for health insurance decreases from mean of \$330.14 (2017) to mean of \$261.16(current)

- these numbers could be skewed by outliers (would employee drivers have extremely high or low health insurance premiums).
- A more appropriate representation may be the median in 2017 (\$219.50) decreased in 2023 (\$194).

Fewer drivers are smoking. Regular exercise is on the incline.



Hope for tomorrow's drivers

PED SURVEY COMPARISON FROM 2007 - 2023

Slight uptick in drivers encouraging their children to become a truck driver in recent years from 28% up to 40%

Slight decrease in “no” responses from 72% down to 60%.

Seems more are being encouraged to become a truck driver while less are being diverted away from the career by parents.

Is this the result of an increase in benefits packages for employee drivers?

monthly premiums for health insurance decreases from mean of \$330.14 (2017) to mean of \$261.16(current)

- these numbers could be skewed by outliers (would employee drivers have extremely high or low health insurance premiums).
- A more appropriate representation may be the median in 2017 (\$219.50) decreased in 2023 (\$194).

Fewer drivers are smoking. Regular exercise is on the incline.

Happy Birthday Mom!

870-476-6428



Leased On - Choosing the MC

When selecting a carrier to lease to, what are the most important issues you consider?

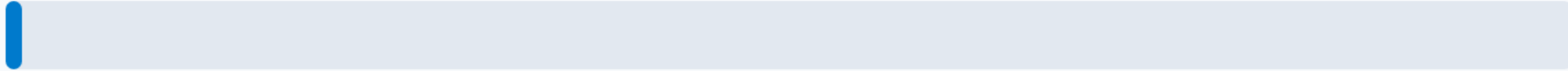
Please rank them in order of importance:

- Amount of freight**
- Type of Payment**
- Company Safety Record**
- Detention Pay**
- Company Reputation**
- Claims Handling**
- Freight rates**

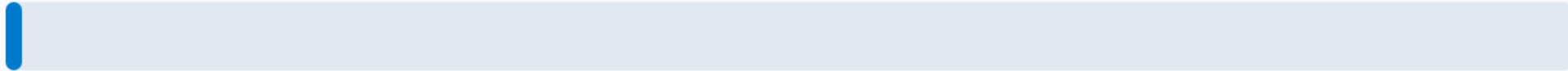
QUIZ TIME!

When choosing to lease on to a carrier, what is most important issue for you?

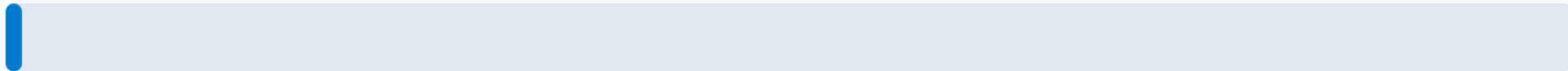
Amount of Freight



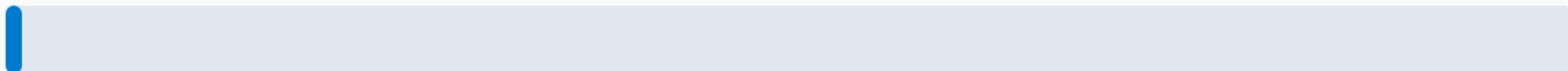
Type of Payment



Company Safety Record



Detention Pay



Company Reputation



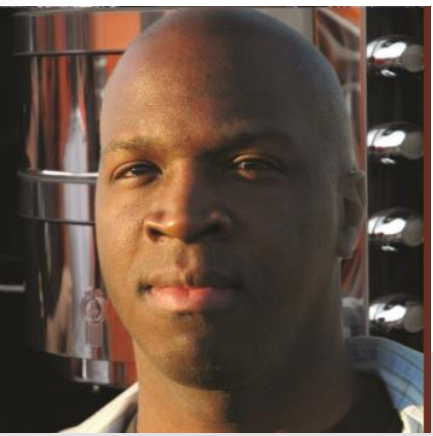
SEE MORE 



Leased On - Choosing the MC -ANSWERS

When selecting a carrier to lease to, what are the most important issues you consider? Please rank them in order of importance:

1. **Freight rates**
2. **Amount of freight**
3. **Company reputation**
4. Type of payment
5. Detention pay
6. Company safety record
7. Claims handling



Leased On - Leaving the MC

If you have left a carrier, what were the most important issues that caused you to leave? Rank in order of most to least important

Lack of freight – 2.9 (3rd)

Low pay – 2.1 (1st)

Excessive detention – 3.6

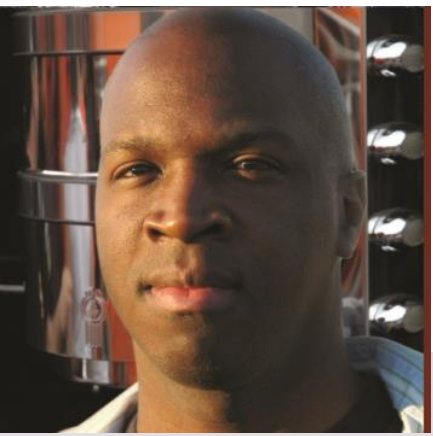
Not enough home time – 3.8

Lack of respect – 2.7 (2nd)

Company reputation – 5.0

Company safety record – 5.3

Other – 4.8



Leased On - How long with today's MC?

How long have you been with your present carrier?

0-1 year – 15%

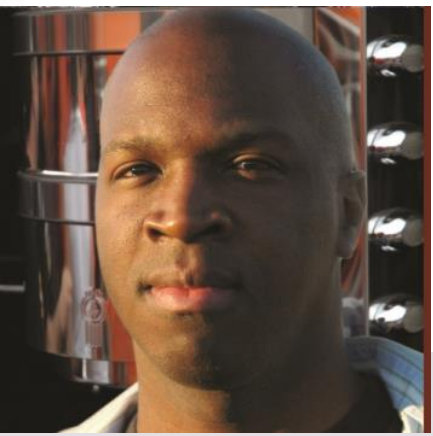
2-3 years – 24%

4-5 years – 14%

6-7 years – 8%

8-10 years – 12%

11+ years – 26%



Leased On - How many MCs?

How many carriers have you worked for in your career?

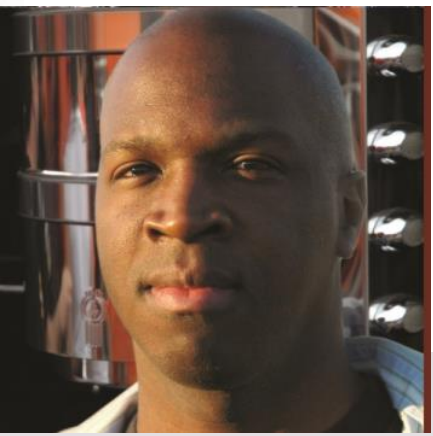
1 – 8%

2 – 10%

3 – 21%

4 – 16%

5 or more – 45%



Leased On - Size of the MC

The carrier I work for has:

1 truck – 4%

2-5 trucks – 6%

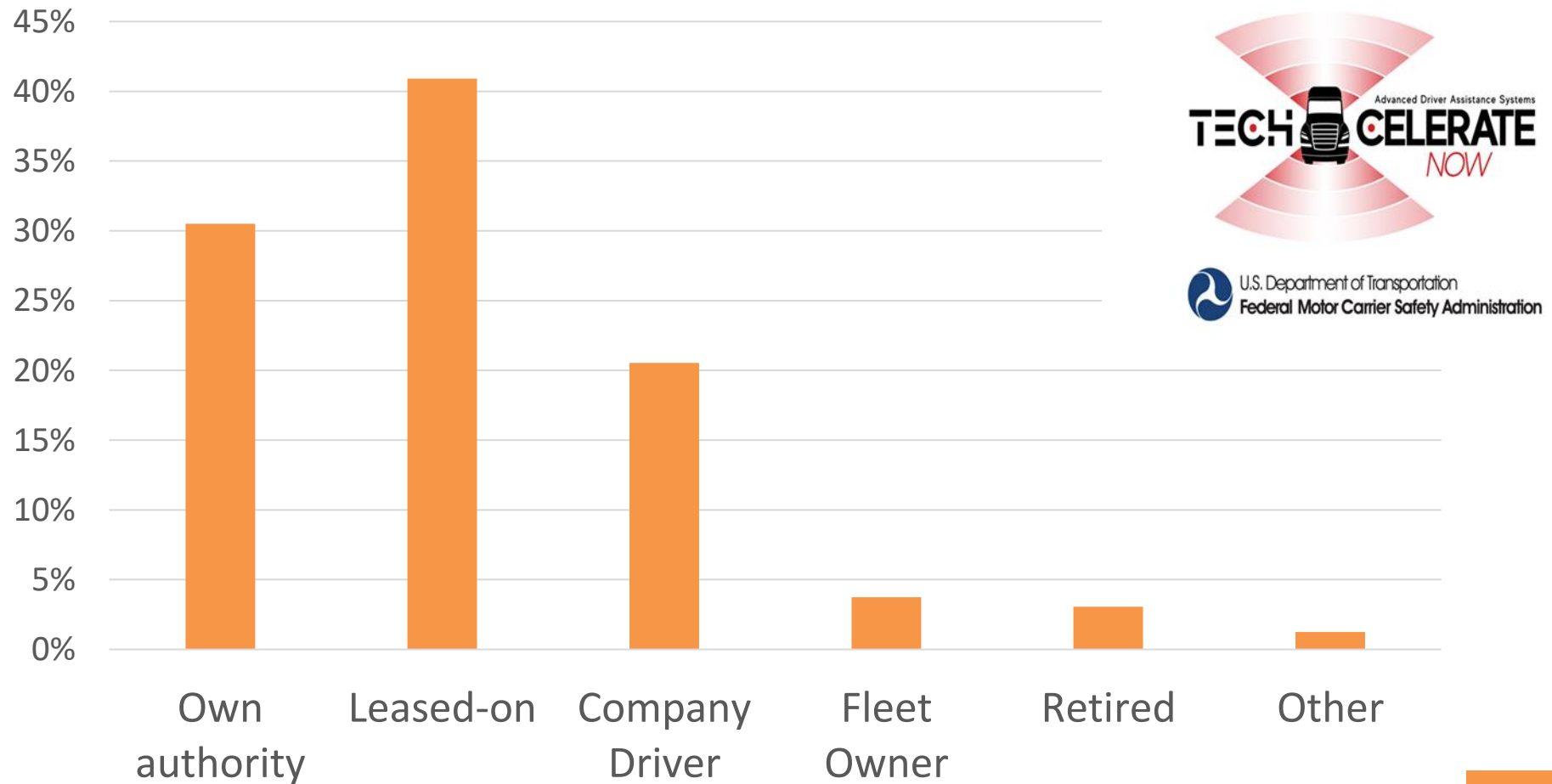
6-20 trucks – 13%

21-100 trucks – 28%

101-1,000 trucks – 26%

1,001+ trucks – 23%

Which best describes your type of Operation?



(2019-2021)

In your opinion, rank from most likely to improve safety to the least likely to improve safety

0 surveys completed

0 surveys underway

Which technologies are the most or least effective in improving safety?

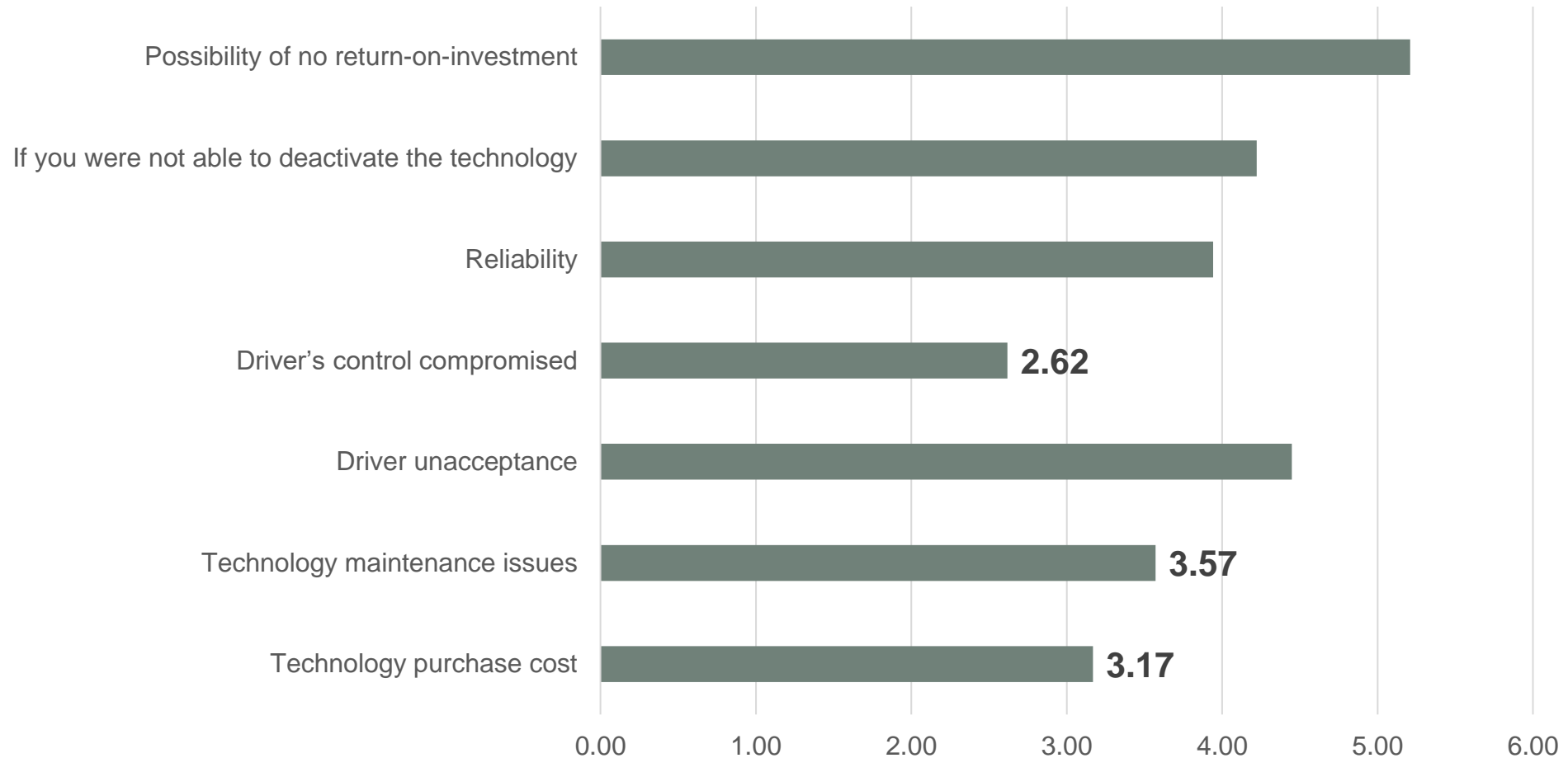
Technology	Will harm safety	No improvement	Slight improvement	Moderate improvement	Very large improvement in safety
Automatic Emergency Braking	35%	15%	26%	15%	7%
Air Disc Brakes	2%	10%	16%	27%	45%
Adaptive Cruise Control	13%	36%	29%	17%	5%
Active Lane Keep Assist	16%	24%	36%	17%	7%
Active Lane Centering Assist	18%	30%	33%	14%	5%
Adaptive Steering Control	34%	29%	23%	11%	3%
Lane Departure Warning	5%	17%	37%	27%	13%
Forward Collision Warning	6%	14%	32%	29%	19%
Blind Spot Warning	2%	8%	26%	31%	33%
Driver-Facing Camera	39%	46%	9%	4%	3%
Road-Facing Camera	4%	24%	23%	25%	25%
Camera-Based Mirror System	11%	30%	21%	22%	15%

Which technologies are the most or least effective in improving safety?

Technology	Will harm safety	No improvement	Slight improvement	Moderate improvement	Very large improvement in safety
Automatic Emergency Braking	35%	15%	26%	15%	7%
Air Disc Brakes	2%	10%	16%	27%	45%
Adaptive Cruise Control	13%	36%	29%	17%	5%
Active Lane Keep Assist	16%	24%	36%	17%	7%
Active Lane Centering Assist	18%	30%	33%	14%	5%
Adaptive Steering Control	34%	29%	23%	11%	3%
Lane Departure Warning	5%	17%	37%	27%	13%
Forward Collision Warning	6%	14%	32%	29%	19%
Blind Spot Warning	2%	8%	26%	31%	33%
Driver-Facing Camera	39%	46%	9%	4%	3%
Road-Facing Camera	4%	24%	23%	25%	25%
Camera-Based Mirror System	11%	30%	21%	22%	15%

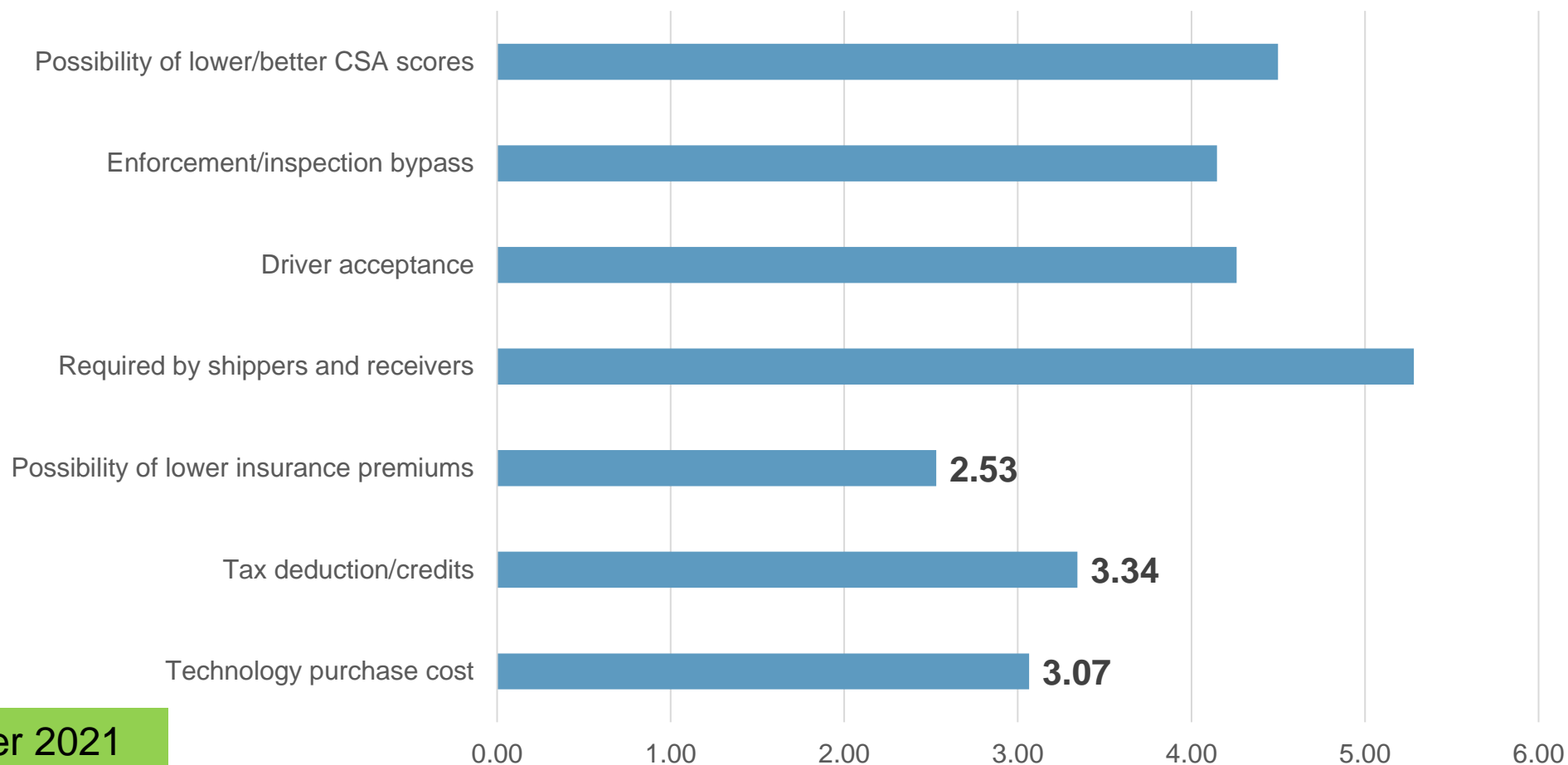
Most Influential Factors in Deciding **NOT** to Purchase ADAS

(1 = highest importance, 7 = lowest importance)



Most Influential Factors in Deciding to Purchase ADAS

(1 = highest importance, 7 = lowest importance)



September 2021

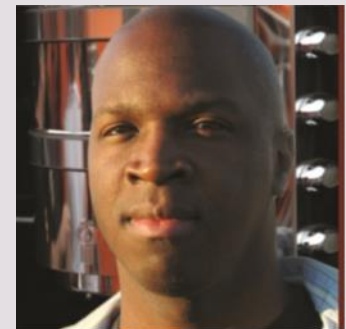
Greatest Challenges Take away & quote



Both LO and OO named regulations as a challenge, but the number of regulations that those with their own authority have to comply with is much greater (paperwork, taxes, permits, licenses, insurance, etc.)

Takeaway - regulations that impact small carriers much differently than larger carriers.

*“Mismatched government regulation. **Safety is absolutely paramount.** However, the individual or small fleet owner is at risk by being required to provide equal expense to ensure compliance as the major carriers. There’s no consideration made to varying fleet size as to cost incurred for ensuring compliance or the same with regard to cost of violations of compliance.”*





OOIDA Foundation

RESEARCH • SAFETY • EDUCATION

OOIDA

Owner-Operator Independent Drivers Association Foundation, Inc.

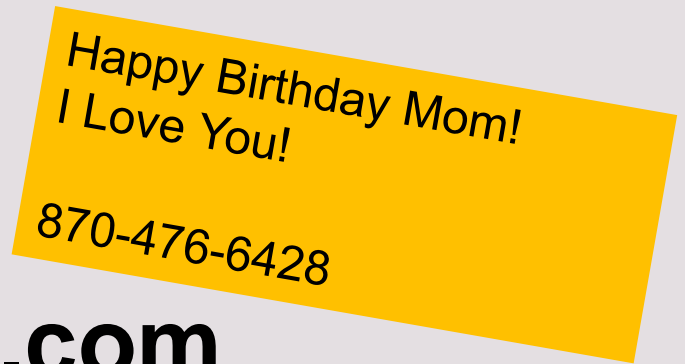
A subsidiary of Owner-Operator Independent Drivers Association, Inc.

1 NW OOIDA Drive | PO Box 1000 | Grain Valley, MO 64029 | Tel: (816) 229-5791

E-mail: FoundationDept@ooida.com | Website: www.ooida.com/foundation

Thank You !

Dee Studebaker
Assistant Director of Operations
OOIDA Foundation



Email: dee_studebaker@ooida.com

Web: www.ooida.com/foundation