



Ohio Trucking Association and Schneider Downs Transportation Business Outlook and Economic Survey – Raw Data

2019

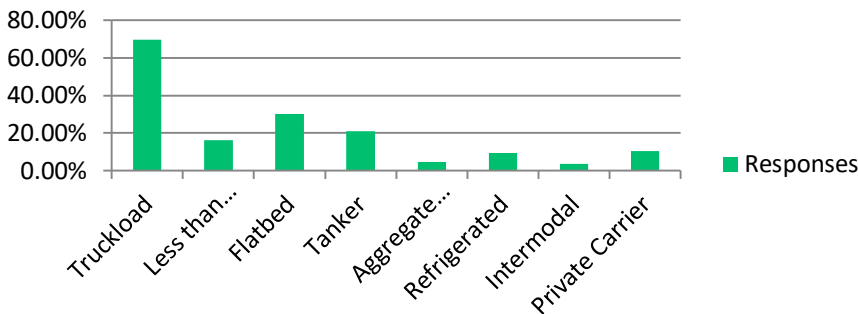
Big Thinking. Personal Focus.

Which sector of the trucking industry are you in? (check all that apply)

Answer Choices	Responses	
Truckload	69.77%	60
Less than Truckload	16.28%	14
Flatbed	30.23%	26
Tanker	20.93%	18
Aggregate and Construction	4.65%	4
Refrigerated	9.30%	8
Intermodal	3.49%	3
Private Carrier	10.47%	9
Other (please specify)		20

Respondents	Other (please specify)
1	Professional Services
2	Expedite
3	Safety
4	heavy Haul
6	Mfg
7	Livestock
9	Oversized/Overweight Loads
10	Small Package
11	Government Contractor
32	Allied Industry
13	Over Dimensional
14	retail
20	dump truck services
16	HAZ/ NON HAZ
25	Truck driver training
18	Insurance
19	Software for Aftersales/Service

Which sector of the trucking industry are you in? (check all that apply)



What additional services do you offer within the transportation, logistics and warehousing space? (check all that apply)

Answer Choices	Responses	
Third Party Logistics	52.54%	31
Warehousing	52.54%	31
Freight Brokerage	69.49%	41
Other (please specify)		14

Respondents	Other (please specify)
1	Drug Testing
2	Compliance
4	Lubricants
6	RESALE/LEASING
7	Insurance and Safety Services
8	body upfits
9	Trans-loading Services with Rail and Barge and packaging
50	None
18	N/A

What additional services do you offer within the transportation, logistics and warehousing space? (check all that apply)

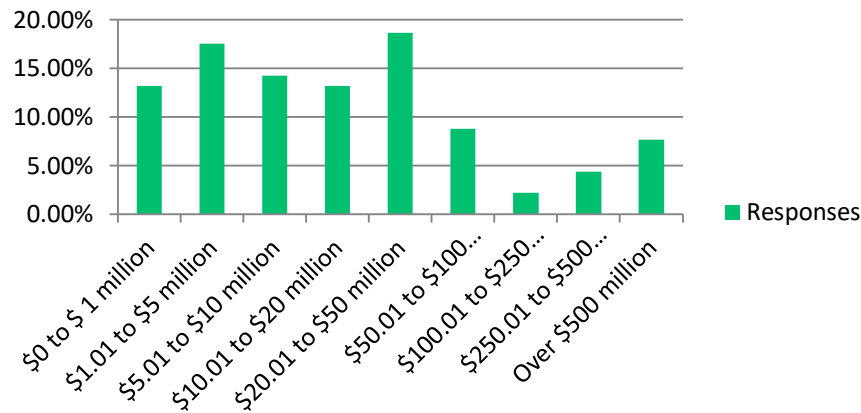


What is the annual revenue of your trucking business?



Answer Choices	Responses	
\$0 to \$ 1 million	13.19%	12
\$1.01 to \$5 million	17.58%	16
\$5.01 to \$10 million	14.29%	13
\$10.01 to \$20 million	13.19%	12
\$20.01 to \$50 million	18.68%	17
\$50.01 to \$100 million	8.79%	8
\$100.01 to \$250 million	2.20%	2
\$250.01 to \$500 million	4.40%	4
Over \$500 million	7.69%	7

What is the annual revenue of your trucking business?

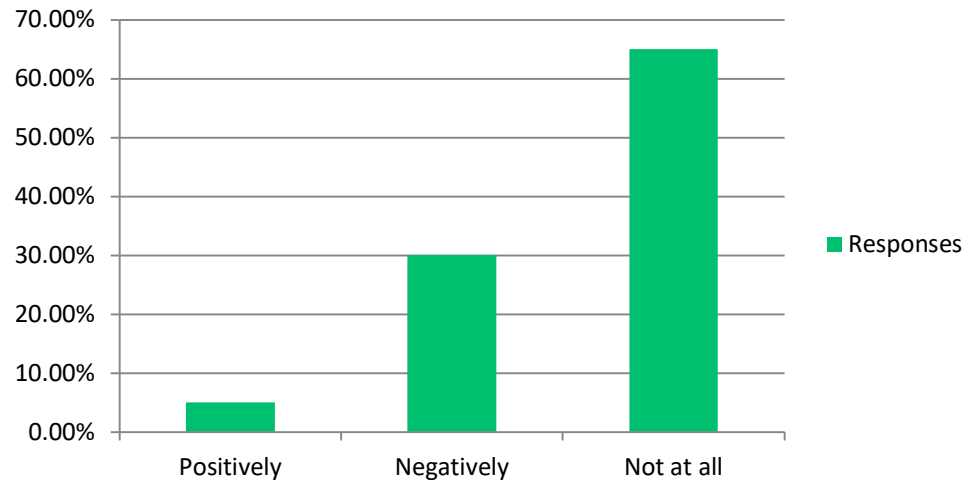


How have the changes to tariffs impacted your company?

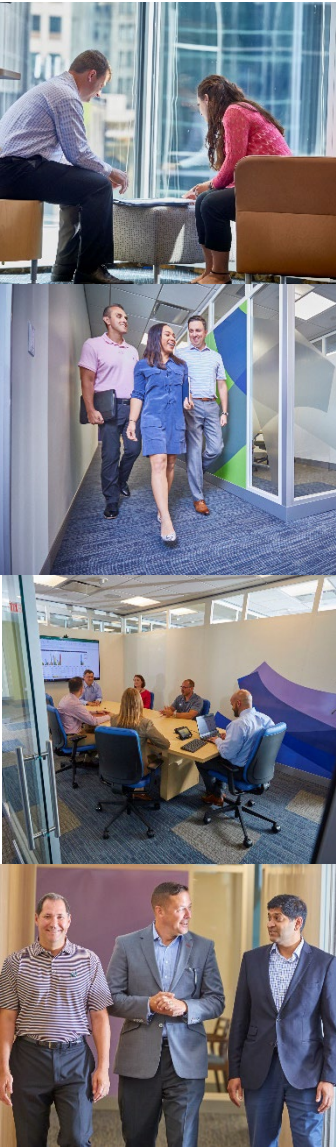


Answer Choices	Responses	
Positively	5.00%	4
Negatively	30.00%	24
Not at all	65.00%	52

How have the changes to tariffs impacted your company?

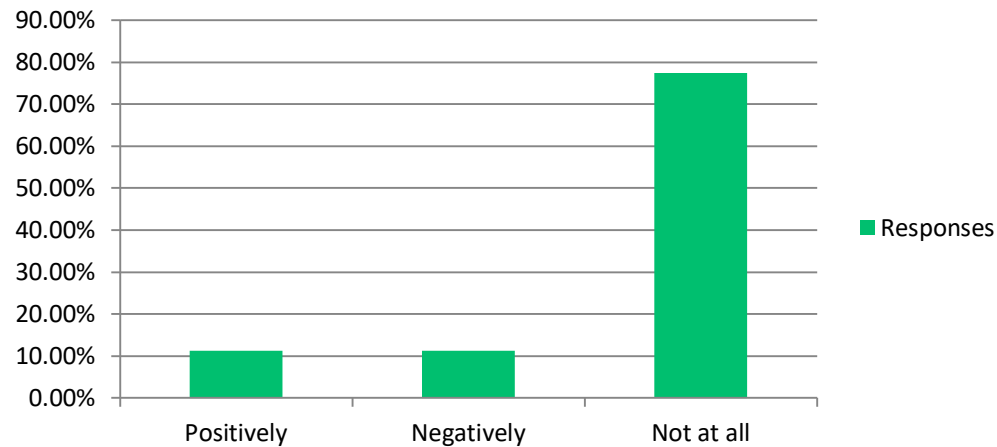


How has the restructuring of NAFTA, now USMCA, impacted your business?



Answer Choices	Responses	
Positively	11.25%	9
Negatively	11.25%	9
Not at all	77.50%	62

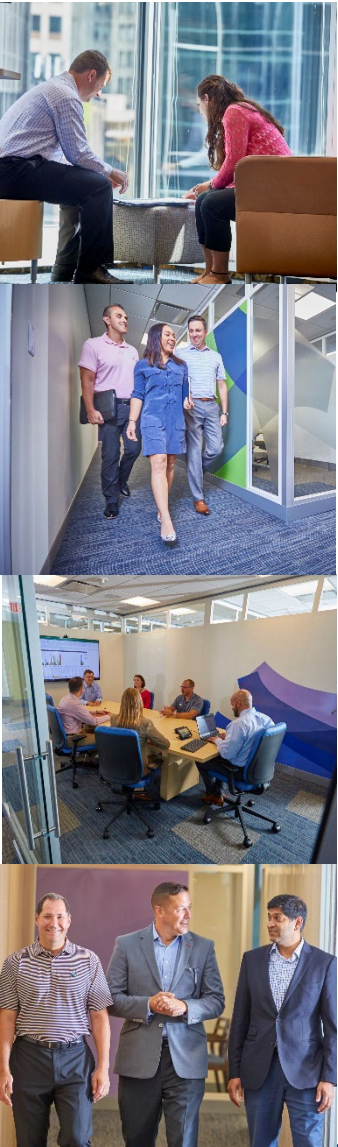
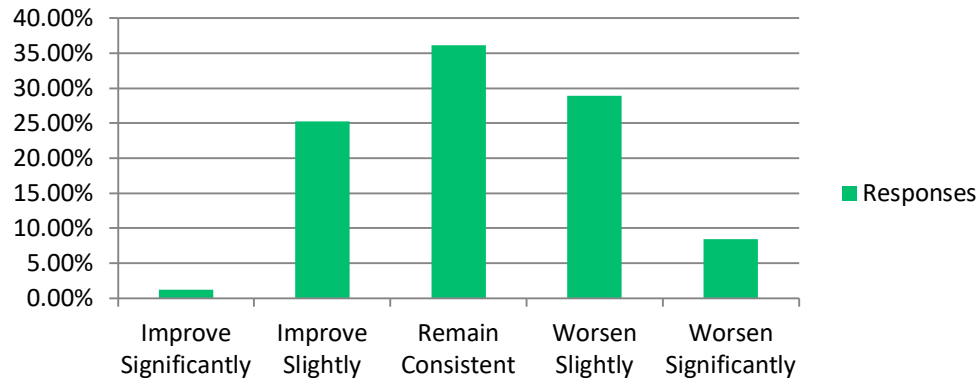
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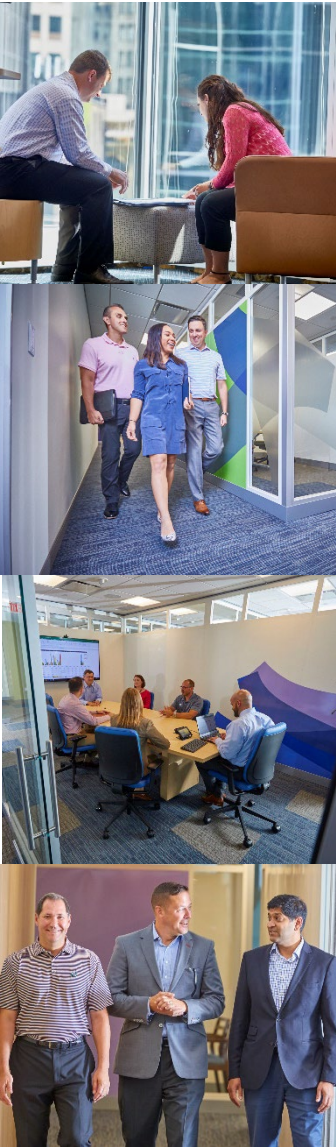
In the next 12 months, do you believe the overall economic conditions in the transportation industry will:

Answer Choices	Responses	
Improve Significantly	1.20%	1
Improve Slightly	25.30%	21
Remain Consistent	36.14%	30
Worsen Slightly	28.92%	24
Worsen Significantly	8.43%	7

In the next 12 months, do you believe the overall economic conditions in the transportation industry will:

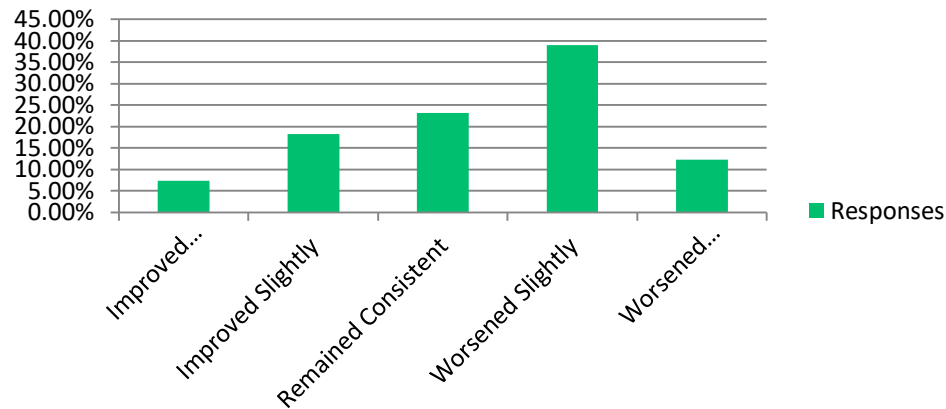


What do you believe the state of the transportation industry is today compared to a year ago?



Answer Choices	Responses	
Improved Significantly	7.32%	6
Improved Slightly	18.29%	15
Remained Consistent	23.17%	19
Worsened Slightly	39.02%	32
Worsened Significantly	12.20%	10

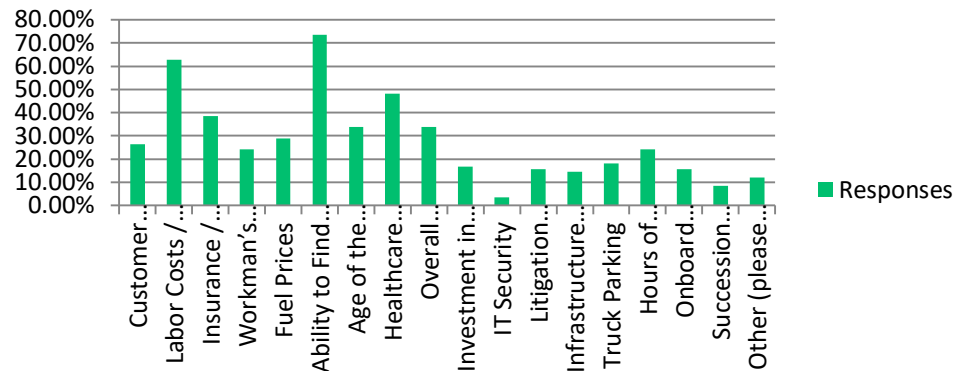
What do you believe the state of the transportation industry is today compared to a year ago?



Select the toughest challenges your organization is currently facing: (Check the top five that apply)

Answer Choices	Responses	
Customer Demand / Economic Environment	26.51%	22
Labor Costs / Driver Retention	62.65%	52
Insurance / Reinsurance Costs	38.55%	32
Workman's Compensation Costs	24.10%	20
Fuel Prices	28.92%	24
Ability to Find and Hire Experienced Drivers	73.49%	61
Age of the Drivers / Health and Wellness	33.73%	28
Healthcare Costs	48.19%	40
Overall Regulatory Environment	33.73%	28
Investment in New Equipment	16.87%	14
IT Security	3.61%	3
Litigation Exposure / Tort Reform	15.66%	13
Infrastructure / Congestion	14.46%	12
Truck Parking	18.07%	15
Hours of Service Rules	24.10%	20
Onboard Technology	15.66%	13
Succession Planning	8.43%	7
Other (please specify)	12.05%	10

Select the toughest challenges your organization is currently facing: (Check the top five that apply)

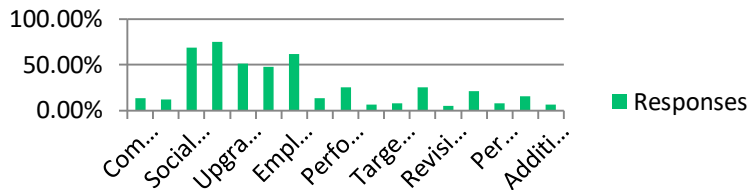


Respondents	Other (please specify)
1	E Logs
9	Low rates
5	Unreliability of today's tractors.
6	Transport Fleets
7	Indemnification requests inside contracts
8	EQUIPMENT COSTS
9	unreliability of trucks due to all the emission requirements
10	Final phase of ELD conversion

Which of the following best describes actions you have taken to address the driver shortage for your company? (Check the top five that apply)

Answer Choices	Responses	
Community Outreach	13.16%	10
Academic Partnership	11.84%	9
Social Media Engagement (i.e. recruiting, marketing)	68.42%	52
Wage Increase	75.00%	57
Upgrade Equipment and Technology	51.32%	39
Advertising	47.37%	36
Employee Referral Programs	61.84%	47
Use of External Recruiters/Headhunters	13.16%	10
Performance-Based Incentives	25.00%	19
Profit Sharing	6.58%	5
Targeting of Specific Demographics	7.89%	6
Driver Training Programs	25.00%	19
Revisions to Business Model	5.26%	4
Guaranteed at Home Time	21.05%	16
Per Diem	7.89%	6
Guaranteed Weekly Compensation	15.79%	12
Additional Employee Benefits (Please specify)	6.58%	5

Which of the following best describes actions you have taken to address the driver shortage for your...



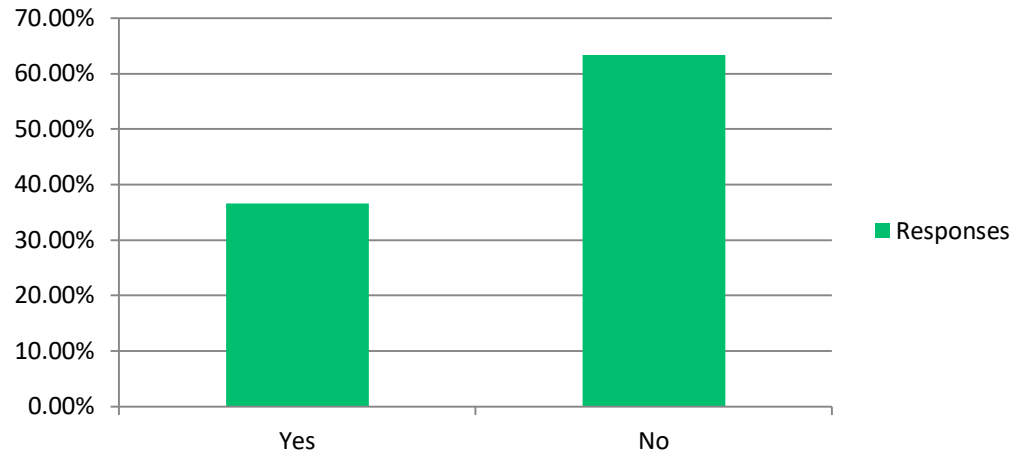
Respondents	Additional Employee Benefits (Please specify)
1	Recruit former drivers
2	dental, vision life at no cost
7	N/A
5	HOLIDAY/VACA TIME/ 401K

Do you consider cybersecurity to be a significant issue for your trucking business?



Answer Choices	Responses	
Yes	36.59%	30
No	63.41%	52

Do you consider cybersecurity to be a significant issue for your trucking business?

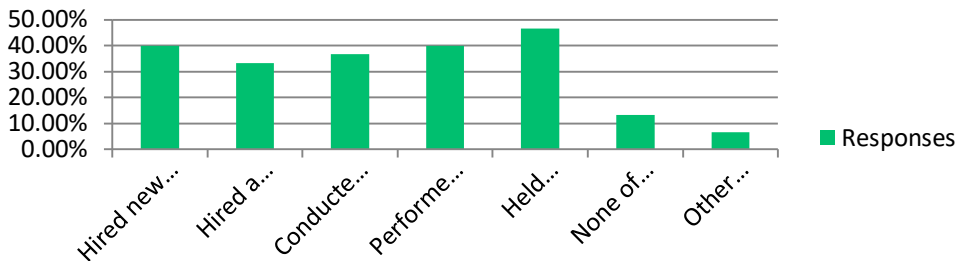


Which of the following best describes actions you have taken to improve your security against cyber-attacks in the past year? (Check all that apply)

Answer Choices	Responses	
Hired new key personnel to manage risk	40.00%	12
Hired a vendor / partner to manage risk	33.33%	10
Conducted a high-level security assessment	36.67%	11
Performed a vulnerability assessment / penetration test	40.00%	12
Held security awareness training	46.67%	14
None of the above	13.33%	4
Other (please specify)	6.67%	2

Which of the following best describes actions you have taken to improve your security against cyber-attacks in the past year? (Check all that apply)

Respondents	Other (please specify)
1	controlled by our corporate office
2	Discussed with OEM's

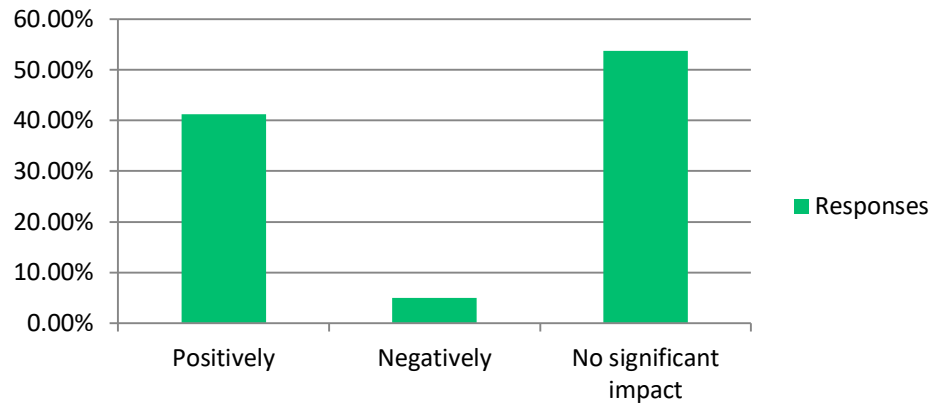


The tax reform law passed in December of 2017 has impacted your company?



Answer Choices	Responses	
Positively	41.25%	33
Negatively	5.00%	4
No significant impact	53.75%	43

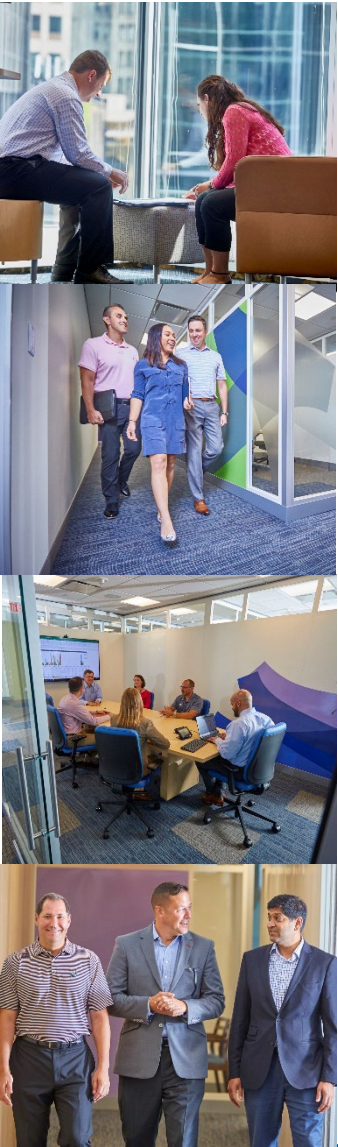
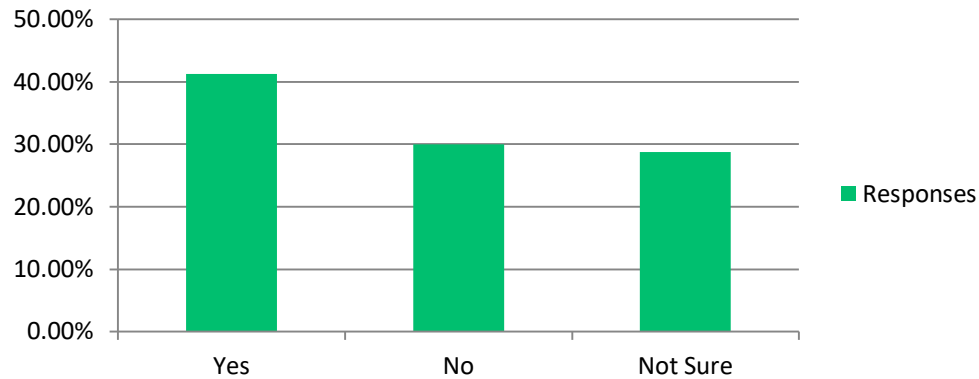
The tax reform law passed in December of 2017 has impacted your company?



Are you optimistic that the current administration and Congress will engage a major infrastructure bill in the next 12 months?

Answer Choices	Responses	
Yes	41.25%	33
No	30.00%	24
Not Sure	28.75%	23

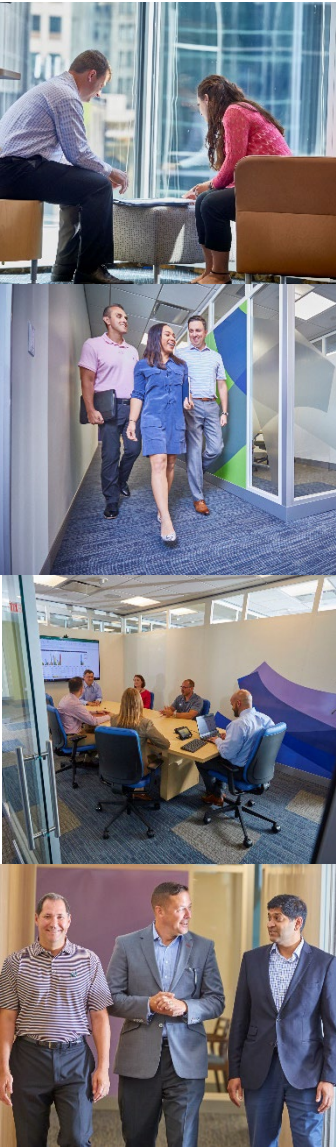
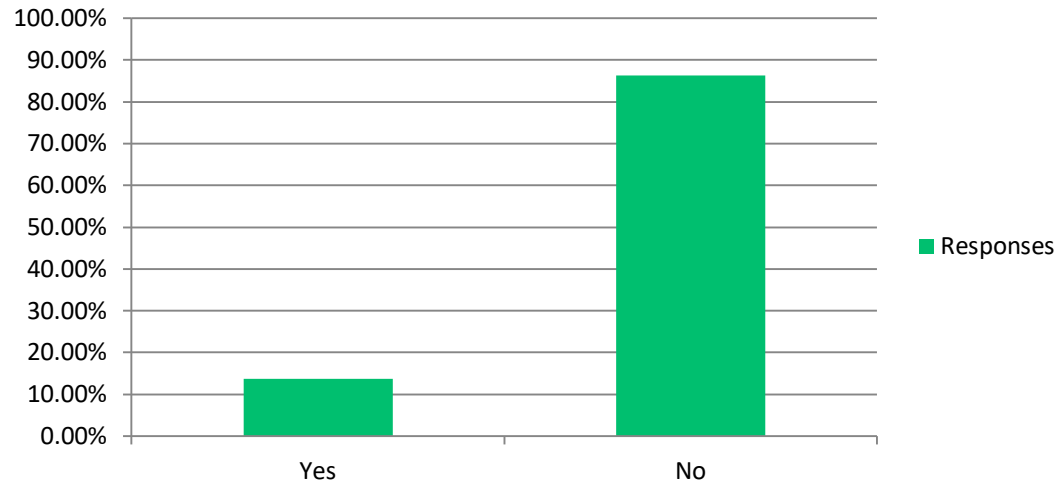
Are you optimistic that the current administration and Congress will engage a major infrastructure bill in the next 12 months?



Does your company have any alternative fuel vehicles (CNG or Electric) in your fleet?

Answer Choices	Responses	
Yes	13.75%	11
No	86.25%	69

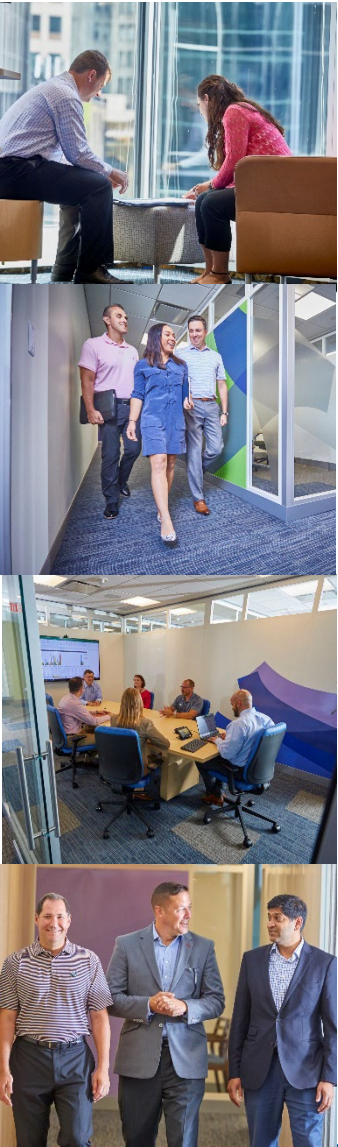
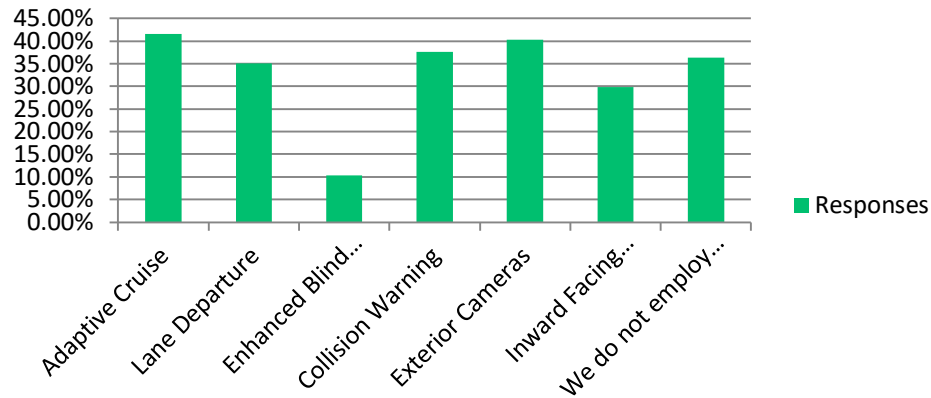
Does your company have any alternative fuel vehicles (CNG or Electric) in your fleet?



Which driver assisted technology does your company employ? (Check all that apply)

Answer Choices	Responses	
Adaptive Cruise	41.56%	32
Lane Departure	35.06%	27
Enhanced Blind Spot Detection	10.39%	8
Collision Warning	37.66%	29
Exterior Cameras	40.26%	31
Inward Facing Cameras	29.87%	23
We do not employ driver assisted technology	36.36%	28

Which driver assisted technology does your company employ? (Check all that apply)



What is your operational ratio of your trucking business? $OR = [(Operating Cost) / (Operating Revenues)] \times 100?$

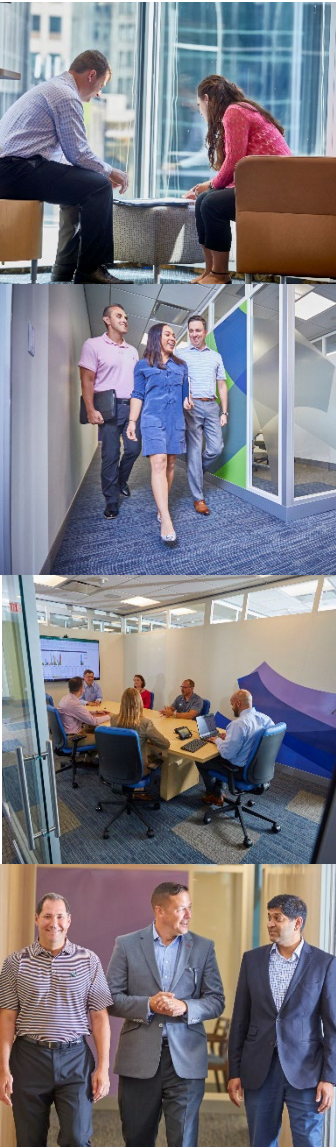
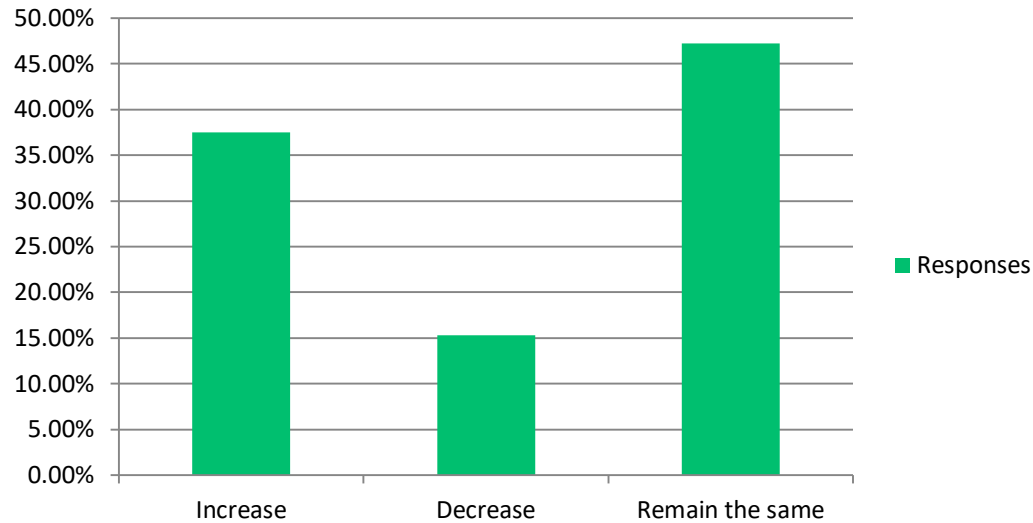


Respondents	Responses	Respondents	Responses
1	80	21	98
2	88	22	58
3	103	23	104
4	98	24	92
5	91	25	95%
6	7.5	26	95
7	94	27	90
8	97	28	N/A
9	.96	29	98.5
10	95	30	96
11	92	31	97
12	87	32	100000
13	n/a	33	97
14	95	34	91
15	90	35	91
16	84	36	0
17	5	37	n/a
18	94.5%		
19	72		
20	90		

In the next 12 months, our capital budget will:

Answer Choices	Responses	
Increase	37.50%	27
Decrease	15.28%	11
Remain the same	47.22%	34

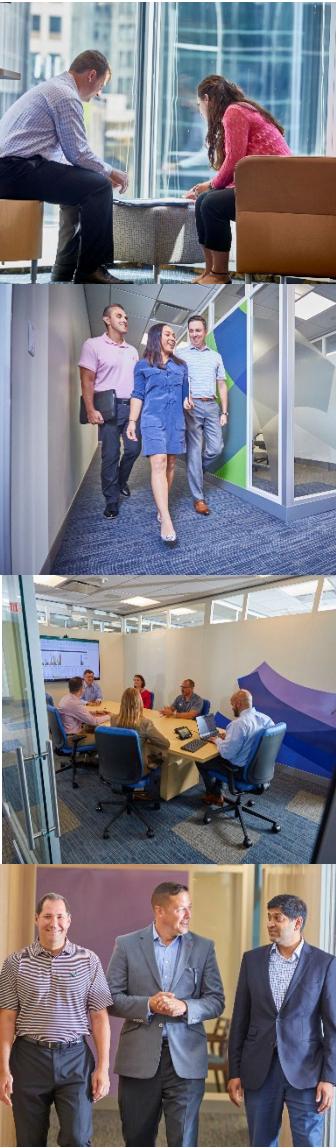
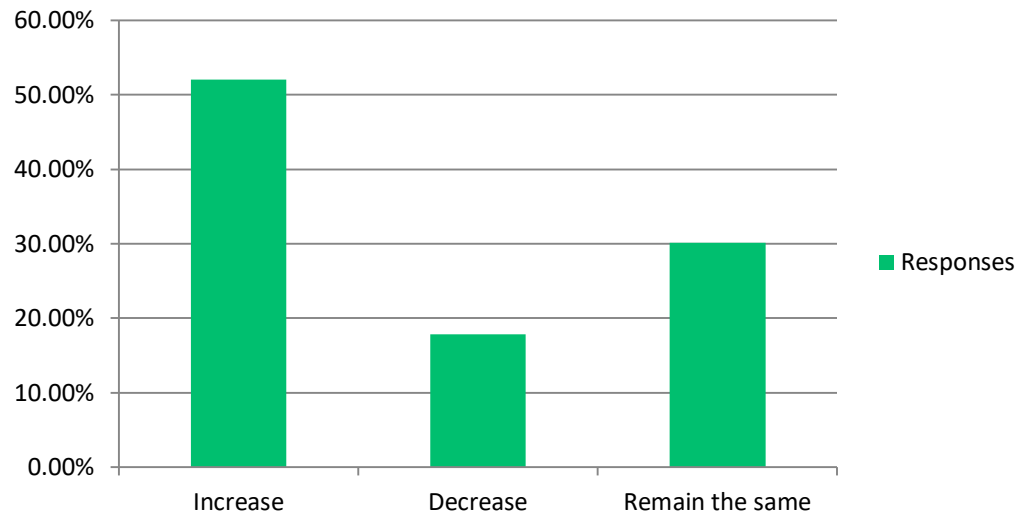
In the next 12 months, our capital budget will:



In the next 12 months our fleet maintenance costs will:

Answer Choices	Responses	
Increase	52.05%	38
Decrease	17.81%	13
Remain the same	30.14%	22

In the next 12 months our fleet maintenance costs will:

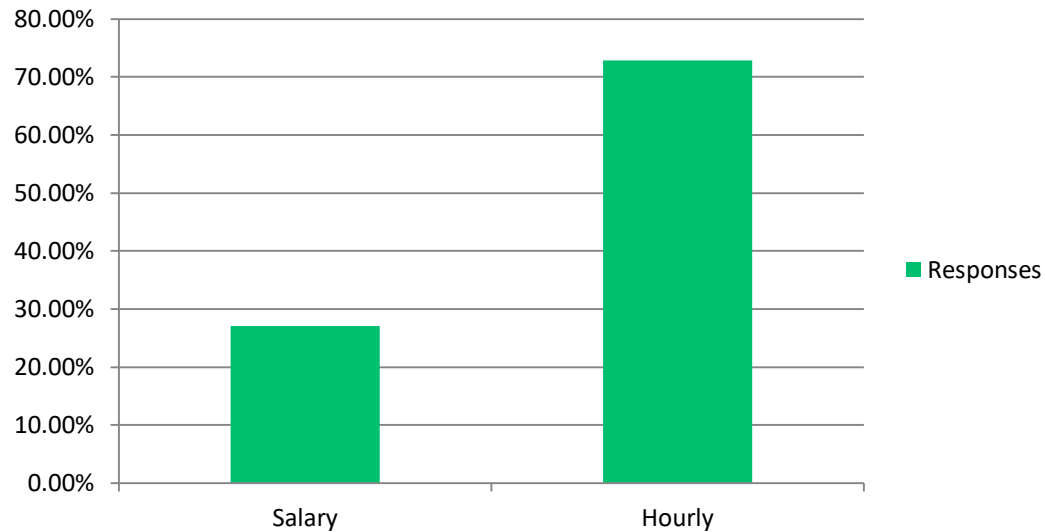


Are your drivers paid on a salary or hourly basis?

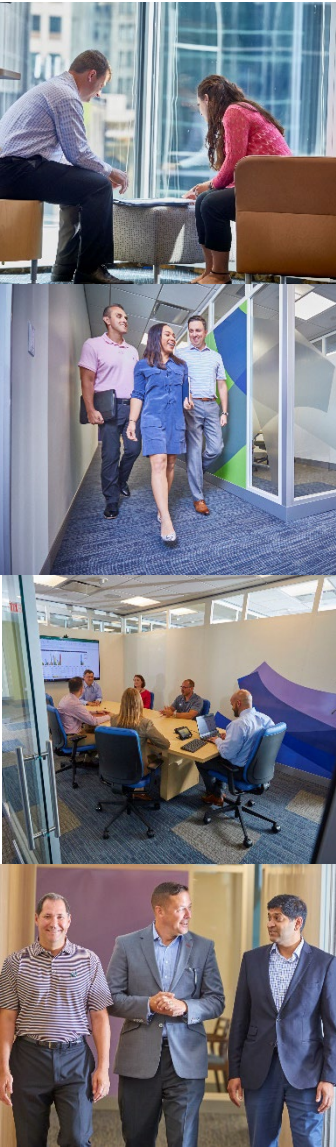


Answer Choices	Responses	
Salary	27.12%	16
Hourly	72.88%	43

Are your drivers paid on a salary or hourly basis?



What is the average salary a driver receives?



Respondents	Responses	Respondents	Responses
1	Forty	15	52k
2	55,000 to 75,000	16	\$65,000
3	45to80	17	48,000
4	Chose best answer - we compensate % of haul average for W2 drivers would be \$55,000	18	They are paid by the mile .38 - .42
5	\$ 1,400 per week	19	\$75,000 to \$100,000
6	Owner Operators - paid on percentage	20	65,000
7	It varies by operation. From \$35,000 to \$90000 plus hospitalization and matching 401	21	\$67k/yr
8	private / to hire carriers used	22	We are brokers, do not employee drivers
9	55,000.00	23	65000
10	\$60000.00	24	\$75k - \$85k
11	55000	25	N/A
12	1400.00	26	\$1300
13	Between 40 an 70 thousand	27	\$70,000
14	1050.00		

What is the average hourly rate drivers receive?

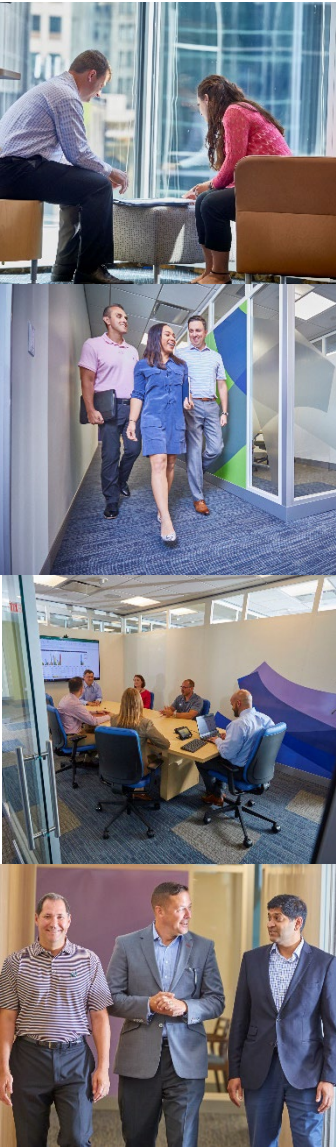
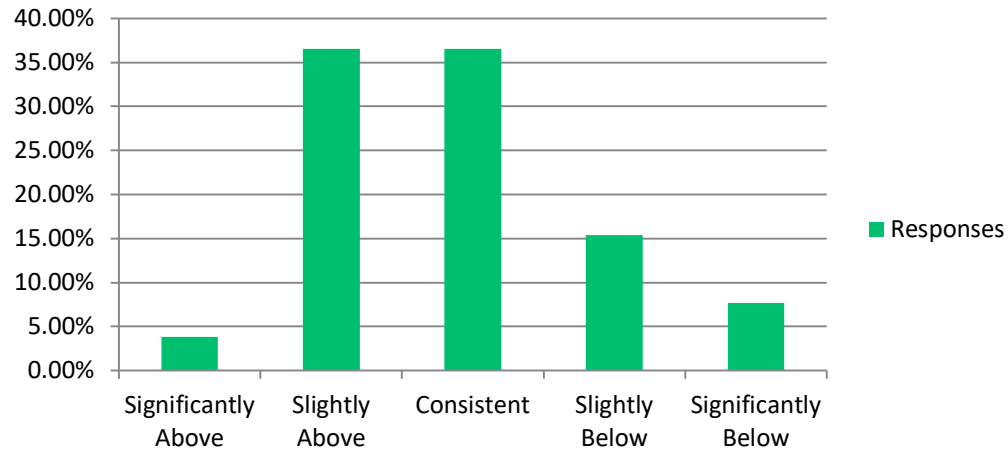


Respondents	Responses	Respondents	Responses
1	22.00 per hour	21	19
2	Contract drivers	22	\$20.90 / HR
			20 plus time/half after
3	24.00	23	40
4	18.50	24	14.00
5	20	25	20.00
6	\$22.00	26	26
7	\$24	27	17.00
8	19.50	28	\$24.00
9	\$24.50/hr	29	25.00
10	Our 95% drivers are paid millage the hourly rate is about \$19.00 for those who are paid hourly	30	25.00
			25% of the line haul rate.
			About \$25 /
11	19	31	hour.
12	19.00	32	.485 per mile
13	\$21.00	33	17.50
14	16	34	21
15	17	35	\$23
16	\$24	36	\$32.00
17	\$21.50	37	23.00
18	\$20-\$30 Per Hour Various across the country	38	18
	regional drivers are paid mileage not hourly. a few short haul or "city" drivers are paid hourly and their compensation is equivalent to 20.00/hour.		
19		39	\$20.00
20	21		

Where do you expect your 2019 forecasted revenues to be compared to your 2018 results?

Answer Choices	Responses	
Significantly Above	3.85%	2
Slightly Above	36.54%	19
Consistent	36.54%	19
Slightly Below	15.38%	8
Significantly Below	7.69%	4

Where do you expect your 2019 forecasted revenues to be compared to your 2018 results?



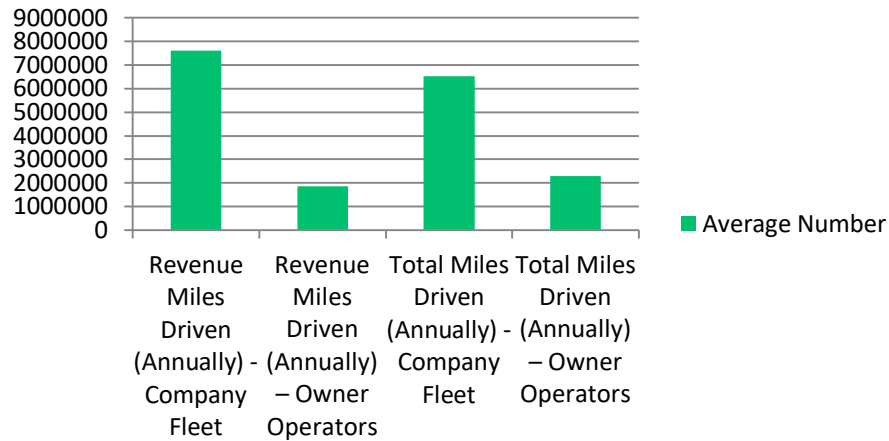
Operations - Miles Driven



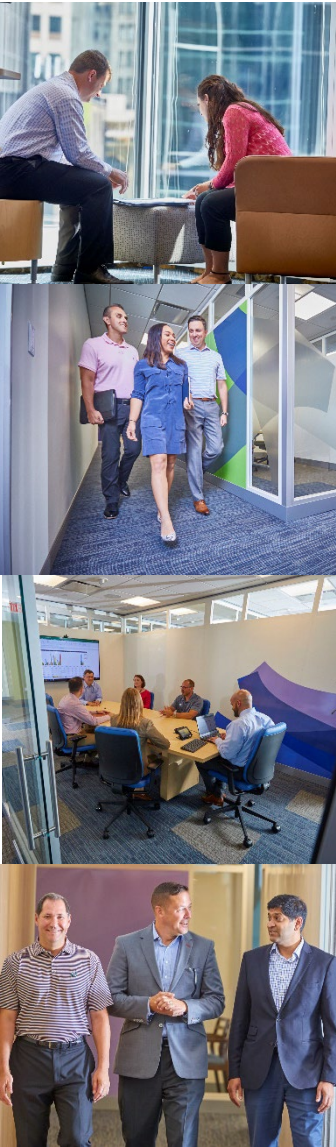
Answer Choices	Average Number	Total Number
Revenue Miles Driven (Annually) - Company Fleet	7621631.84	190540796
Revenue Miles Driven (Annually) – Owner Operators	1852753.905	38907832
Total Miles Driven (Annually) - Company Fleet	6517631.28	162940782
Total Miles Driven (Annually) – Owner Operators	2298416.273	50565158

Responses	
92.59%	25
77.78%	21
92.59%	25
81.48%	22

Operations - Miles Driven



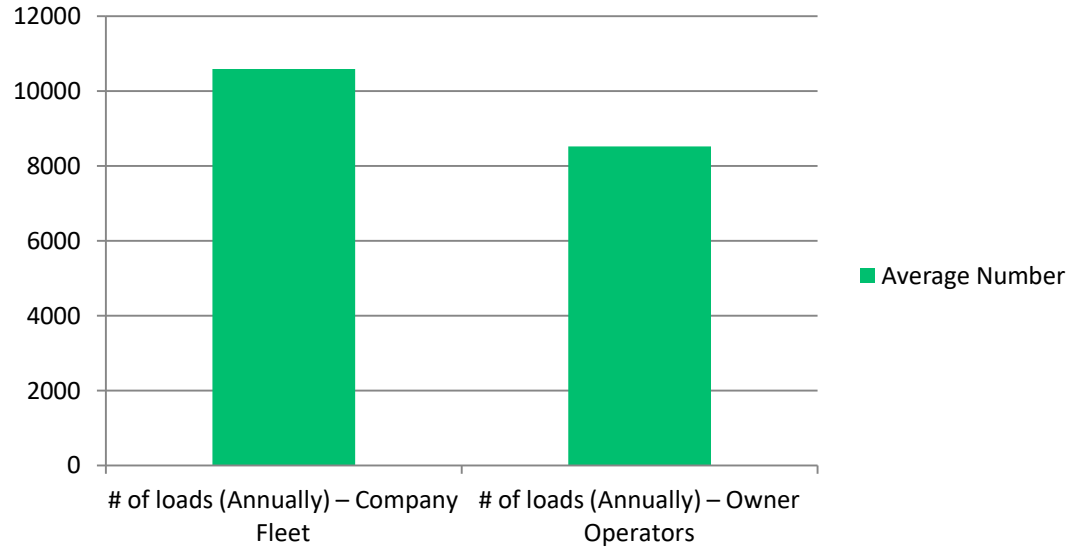
Operations - Loads



Answer Choices	Average Number	Total Number
# of loads (Annually) – Company Fleet	10584.45455	232858
# of loads (Annually) – Owner Operators	8525.235294	144929

Responses	
100.00%	22
77.27%	17

Operations - Loads

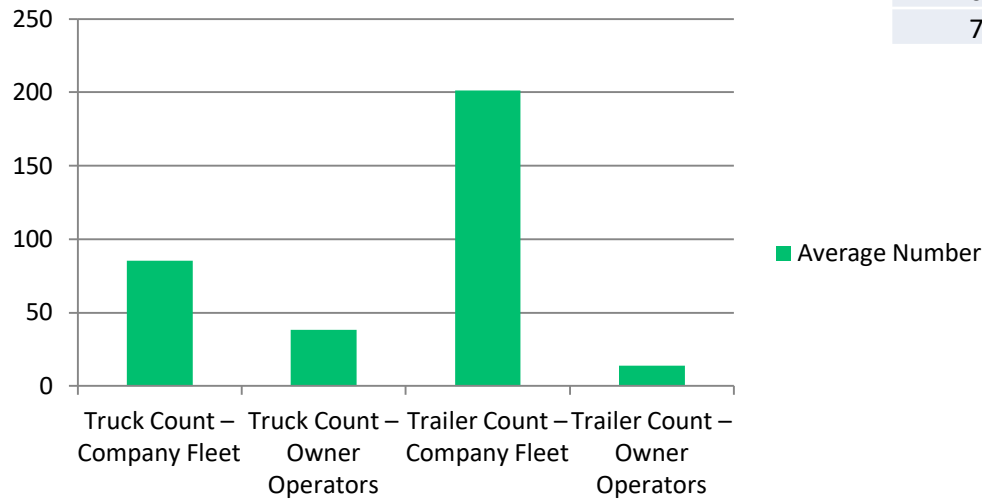


Operations - Trucks and Trailers

Answer Choices	Average Number	Total Number
Truck Count – Company Fleet	85.45454545	2820
Truck Count – Owner Operators	38.33333333	1035
Trailer Count – Company Fleet	201.0909091	6636
Trailer Count – Owner Operators	13.76923077	358

Responses	
100.00%	33
81.82%	27
100.00%	33
78.79%	26

Operations - Trucks and Trailers

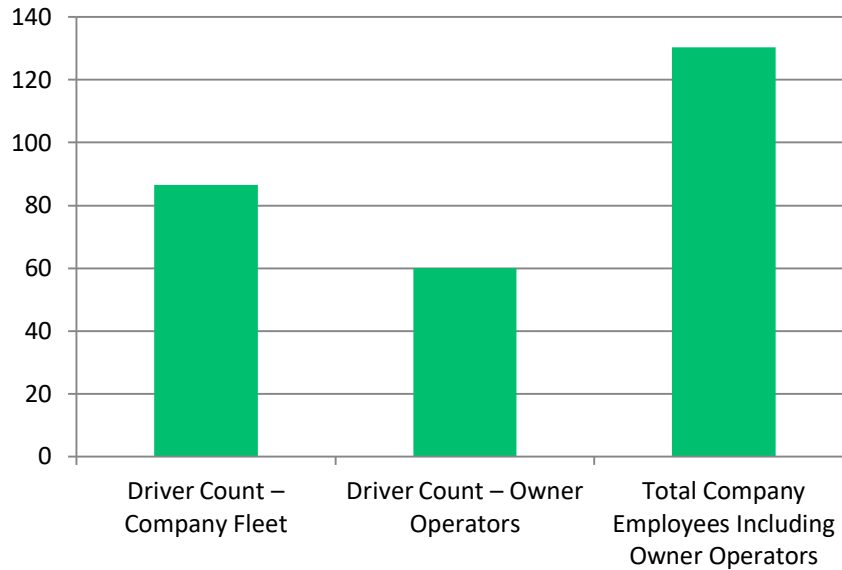


Operations - Personnel



Answer Choices	Average Number	Total Number
Driver Count – Company Fleet	86.57575758	2857
Driver Count – Owner Operators	60.03846154	1561
Total Company Employees Including Owner Operators	130.3333333	4301

Operations - Personnel



Responses	
100.00%	33
78.79%	26
100.00%	33

■ Average Number