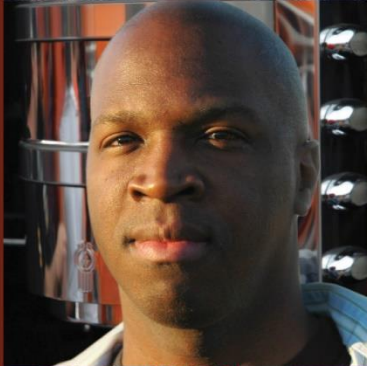


Owner-Operator Independent Drivers Association Foundation
A subsidiary of Owner-Operator Independent Drivers Association Inc.



2022 Owner- Operator Member Profile Survey



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2022 Owner-Operator Member Profile Survey

May 2022



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Introduction

The trucking industry plays a significant role in the United States economy, employing 2.73 million hard working truckers¹ and moving \$12.7 trillion² worth of freight annually, while collecting \$732.3 billion in gross revenue.³ According to the Federal Motor Carrier Safety Administration (FMCSA), 90 percent of all fleets operate ten trucks or less, and nearly 50 percent are single-truck motor carriers. Although small business owner-operators represent a majority of trucking businesses, this important segment is often marginalized in research as academia tend to focus on the opinions of safety managers and large motor carriers.

The Owner-Operator Independent Drivers Association (OOIDA or Association) is the largest not-for-profit international trade association representing the interests of over 150,000 small business owners and professional drivers who operate in all 50 states and Canada. While OOIDA's membership does include company drivers, the majority are owner-operators. These owner-operator members can be divided into two distinct segments, those operating under their own authority and those leased-on to a motor carrier.

While a majority of researchers do not have access to the owner-operator population with any significant numbers, the OOIDA Foundation (OOFI), the research and educational arm of the Association, has been able to both collect and analyze information from this critical segment of the industry. OOFI conducted the first survey of the Association's membership in 1998 in order to accurately communicate the professional opinions of the owner-operators transporting freight across the country with federal, state, and local agencies. The data provided by the survey has not only helped to define the direction of the Foundation, but it has also created a profile for the community of this large and often overlooked group. This is the twelfth edition of the *Owner-Operator Member Profile Survey* (OOMP Survey). OOFI conducts the survey every two years on even numbered years.

¹ <https://data.bts.gov/stories/s/Freight-Transportation-the-Economy/6ix2-c8dn>

² <https://data.bts.gov/stories/s/Moving-Goods-in-the-United-States/bcyt-rqmu>

³ <https://www.statista.com/statistics/922817/trucking-industry-united-states-total-revenue/>

Methodology

The *2022 Owner-Operator Member Profile Survey* (2022 OOMP Survey) was emailed to a random sample of the Association's active membership list, in particular, to those members who identify themselves as owner-operators. To do so, OOFI first removed those business types that did not fit the criteria for the survey, primarily company drivers. OOFI then sorted the membership data by state, generated a random number for every member, and selected the top 25 percent in order to eliminate any potential bias and to make the survey geographically representative. This left a sample size of 17,190 members who allowed email communication. The 2022 OOMP Survey, which OOFI emailed on Friday, March 25, 2022, generated 488 total responses for any one question as of May 9, 2022. This equates to a 95 percent confidence level with a 4 percent margin of error. The Survey therefore received enough response to be considered statically significant

The statistical methods utilized as part of the 2022 OOMP Survey were the mean, mode, median, rank-order, and percentiles. It is important to note that not all survey participants answered all questions. Thus, some questions generated a small number of responses; hence, inferences made from these samplings must be viewed in accordance to the statistical significance of the smaller number of responses. OOFI utilized the following statistical measures to evaluate the 2022 OOMP Survey:

- The *mean*, or the average, is the most common measure of position and of central tendency. This is probably the easiest test measure to understand and is widely used. There are limitations to the mean however as it is affected by extreme values that may distort or misrepresent the analysis. For instance, a bowling score of 120, 130, and 250 will equate to a mean or average of 166.66 $((120 + 130 + 250) \div 3)$, and yet that score was never bowled and two of the three scores were below the mean.
- The *median* indicates the value above which 50 percent of the cases fall; thus it is less likely to lean in the direction of the extreme cases. In the above scenario, the score of 130 is the median because 50 percent of the scores fall above 130 and 50 percent fall below 130. It still is a measure of central tendency.
- The *mode* is the most commonly obtained score or the midpoint of the score interval, which has the highest frequency. If the bowling score was 120, 130, 130, 125, 130, and 250, the mode is 130 as it was the most frequently bowled score.

The percentage of each answer is given based on the total number of respondents marking any one answer; all percentages were rounded to the nearest whole number. Where multiple answers are allowed, the total number of respondents are listed, along with the numbers of responses checked. The percentages however were measured from the total number of respondents for each answer. Thus, they will not equal 100 percent. For rank-order questions, OOFI averaged each response for each category.

Profile of the Owner-Operator

The typical owner-operator member of OOIDA is a Caucasian male, 59 years of age, standing 5 feet 10 inches tall, and weighing 224 pounds, which results in a body mass index (BMI) of 32.1. According to the National Institute for Occupational Health and Safety (NIOSH), 26 percent of truck drivers are overweight (BMI 25.0-29.9) and 64 percent are obese (BMI >30.0),⁴ which suggests that the 2022 OOMP Survey results are in harmony with other industry research. However, it is important to note that the BMI does have several limitations, as it does not consider a person's body composition, age, or gender.

Medical studies have long since demonstrated that the sedentary lifestyle of a trucker can lead to many health issues, including weight gain, diabetes, and hypertension. In the 2022 OOMP Survey, 50 percent of the respondents stated that they took maintenance type prescriptions. Of those drivers who took prescriptions, most indicated that they were for high blood pressure, cholesterol, and diabetes. The subject of driver health, which has affected the trucking industry for several years, continues to remain an area of concern as 25 percent of owner-operators do not have a health insurance plan.

In regards to starting their career in the trucking industry, the majority of owner-operators continue to come from blue-collar occupations such as farming, construction, manufacturing, etc., while several others indicated that they chose to drive a truck either due to their upbringing as a multiple generation truck driver or due to their career in the military. In fact, 32 percent of the respondents stated that they had served in the military at some point in their life.

The average member has been involved in the trucking business for more than 30 years, and has been an owner-operator for nearly 20 years. During this time, the typical owner-operator has accumulated approximately 2.8 million miles of driving, most of which has been without a Department of Transportation reportable accident⁵ resulting in 78.5 crashes per 100 million vehicle miles traveled, or more than two times below the national crash rate for the overall trucking industry.

The owner-operator generally owns one to two trucks, although the number of small fleet owners has increased from 2 percent in 2016 to 5 percent in 2022. The average price for a new vehicle was nearly \$145,000, whereas the cost for a used was almost \$60,000. The majority of owner-operators however have paid off their truck while very few have entered into a lease purchase plan. Most operate a Class 8 truck with a gross vehicle weight of 33,001 pounds or more. The average engine continues to have an excess of over 450-horse power, equipped with a 13-speed transmission, and received 6.4 miles per gallon.

In addition to the truck, most owner-operators owned at least one trailer. Members indicated that a new trailer typically costs approximately \$52,000, compared to \$30,000 for a used trailer. Both the owner-operator under their own authority and those leased-on primarily pulled a dry van trailer, while fleet

⁴ W. Karl Sieber et al., *The National Survey of Long-Haul Truck Driver Health and Injury*, National Institute for Occupational Safety and Health (2014).

⁵ A DOT reportable accident is a crash that resulted in either (1) a fatality, (2) an injury receiving treatment immediately away from the accident scene, or (3) disabling damage to any vehicle involved

owners generally pulled flatbed trailers. All segments indicated that they predominantly haul general freight.

For those owner-operators under their own authority, a majority have established their business as a Limited Liability Corporation. Moreover, they primarily utilize brokers to obtain freight. Whereas leased-on owner-operators established their business as a sole proprietorship and focus chiefly on freight rates, the amount of freight, and the company's reputation before signing on with a carrier. The typical leased-on operator has been with their present carrier for more than 11 years and has changed carriers more than 5 times in their career.

Overall, the owner-operator drives solo rather than in a team operation and operates mainly in the north and southcentral regions of the United States. He or she drove 103,000 miles last year while 17,600 of those miles were deadhead miles, representing 17 percent of all miles driven. Most drove between 501 and 1,000 miles for a typical load's length of haul followed by 151-500 miles and 1,001 miles or more. These trips necessitated being away from home for more than 150 nights per year.

The gross income for the average owner-operator was \$258,000. However, he or she typically accumulated a gross expense of \$187,000, with a large portion attributed to fuel (\$80,700),⁶ maintenance (\$18,000), tires (\$6,000), and tolls (\$2,400). After figuring for all miles driven in the previous year, those under their own authority received an average *net* income of \$0.68 per mile, while leased-on owner-operators earned \$0.75 per mile. The most common type of compensation was per trip pay followed by percentage.

Although the prevalence of technology continues to grow in the trucking industry, the owner-operator segment of the industry remains vastly different from that of the large motor carriers. When asked if they had any advanced driver assistant system (ADAS) technology equipped on their truck, such as automatic emergency braking, lane departure warning, road-facing camera, etc., 41 percent of members stated they did not. This is probably because most members believe the technology has no effect on safety nor any positive benefits to their bottom line. Moreover, the vast majority also do not have a maximum speed setting on their truck, i.e. a speed limiter. For those few who did, the maximum setting was 75 miles per hour.

⁶ 17,713 gallons of fuel purchased × \$2.42 (the average cost per gallon of diesel fuel for the U.S. at the start of August 2020 according to U.S. Energy Information Administration <https://www.eia.gov/petroleum/gasdiesel/>) = \$42,865.

2022 Owner-Operator Member Profile Survey

The *2022 Owner-Operator Member Profile Survey* marks the twelfth in a series of member profile surveys. These surveys, which span more than 20-years, have either confirmed static trends, such as the vast majority of the trucking industry is male, or have assisted in shedding light on new and current trends, for an example, the steady increase in the use of automatic transmissions. Through this anonymous survey, OOFI has been able to track the dramatic changes in the owner-operator segment of the industry.

Academia, lawmakers, and regulators frequently ask OOFI (1) who OOIDA's members are, (2) what is their professional experience, and (3) what are the greatest challenges that they face today. The purpose of the OOMP Survey is to gather sufficient information in order to address these questions so that OOIDA can more accurately communicate the professional opinions of the small business owner and leased-on owner-operator with federal, state, and local agencies. Regrettably, most studies focus almost exclusively on the large carrier owners, business managers, dispatchers, and safety directors for information on various economic and regulatory issues. Hence, the OOMP Survey is critical in gaining a better understanding of the industry from the owner-operators' perspective.

Again, this survey is unique in that it represents the small business men and women who truly drive the economy and embody the trucking industry. It appears that few academics, lawmakers, and regulators have an adequate understanding of the many difficulties associated with being an owner-operator.

Thus, OOFI has continued to conduct these member profile surveys in order for OOIDA to present the collective voice of the small business owner-operator on issues specifically related to him or her. For organizational and analytic purposes, OOFI has separated the survey questions into the following nine distinct sections, including one for those leased on to a motor carrier and one for those operating under their own authority:

1. **Personal Information:** The section consisted of questions on the demographics of the owner-operator members, such as type of operation (owner-operator under their own authority, leased-on owner-operator, fleet owner, etc.), gender, ethnic background, marital status, etc.
2. **Management of Business:** The trucking industry today is incredibly diverse; thus, this section was designed to gather information on the various types of business models as well as the different levels of experience obtained by owner-operators. The questions in this section touch on a number of issues ranging from income, to the type of freight, to the main regions of operation in the U.S.
3. **Medical Issues:** Since 2014, drivers have been required to obtain medical certification from a Certified Medical Examiner (CME) in order to maintain their commercial driver license (CDL). This has raised a number of concerns within the industry and among OOIDA members. This section focuses on a variety of health and medical issues, including sleep apnea.
4. **Environmental Issues:** Over the past decade, the trucking industry has witnessed a higher awareness of environmental issues, and in particular, the focus on the reduction of greenhouse gas (GHG) and CO₂ emissions by various government agencies such as the Environmental

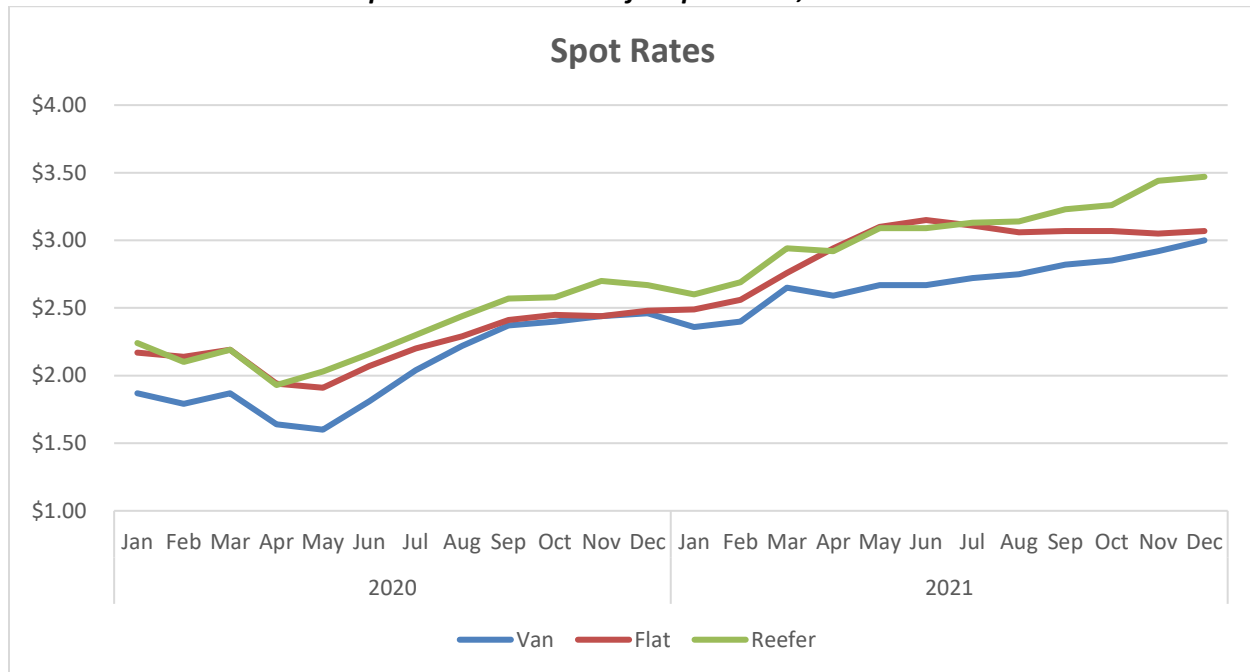
Protection Agency and the California Air Resource Board. The three questions in this section give a glimpse of the overall utilization of environmental technologies and their return-on-investment.

5. **Your Truck:** This section characterizes the type of truck that a typical owner-operator drives and focuses on the power of the engine, the transmission, and the fuel mileage. Moreover, this section touches on the growing interest and adoption rate of ADAS technology in the small carrier segment of the industry.
6. **Maintenance:** This section assists in determining the variable costs that owner-operators must budget for in their cost of operations. The questions focus on how much members spend on maintenance costs and how much is related to emissions-related equipment and/or to poor road conditions.
7. **Trucker Trivia:** This section is important to help formulate an accurate picture concerning the background of the owner-operators as well as some of their reasoning behind choosing to become a truck driver. From these questions, OOFI has continued to learn what compels an owner-operator to remain in the trucking industry. Past member profiles have depicted that approximately 36% of OOIDA members have served in the military during their career.
8. **Owner-Operators Leased-On to a Motor Carrier:** This section is directed specifically to the leased-on owner-operators. The questions under this section address not only what a leased-on owner-operator considers when selecting a motor carrier to work for, but also their work experience with their motor carrier, which includes important questions addressing the issues of turnover and misclassification.
9. **Owner-Operators under their Own Authority:** Although nearly half of all motor carriers are one-truck operations, this segment of the industry is not well understood. Thus, OOFI has attempted to formulate a profile for those members operating under their own authority. This section contains questions that not only assess the owner-operators' business type, but also includes information about the utilization of filing on a broker bond, the DataQ system, and the greatest challenges they see in trucking today.

1. Personal Information

The percentage of respondents who identify themselves as owner-operators under their own authority has grown from 39 percent in 2020 to 44 percent in 2022. Likewise, the percentage of leased-on owner-operators has declined from 48 percent to 45 percent over the same time period. This data appears to support the recent surge in new motor carriers as the freight market has experienced higher freight volumes, elevated demand, and numerous supply chain issues, which have placed continual upward pressure on freight rates over the past two years, as shown in Graph 1.

Graph 1: DAT Trendlines for Spot Rates, 2020-2021



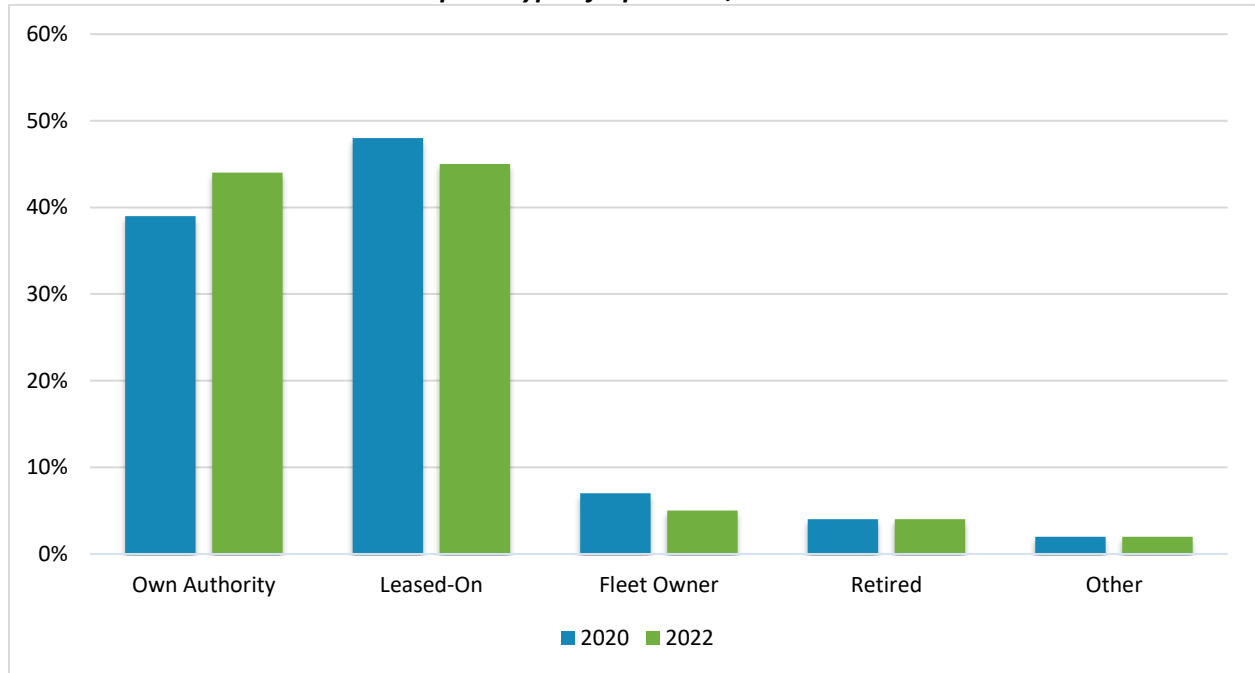
According to FTR, 109,340 trucking companies obtained operating authority in 2021, which is 50,202 more than in 2020 (59,538) and 65,787 more than in 2018 (43,953), the third-largest year on record since 1999, when 15,597 carriers were granted authority.⁷ OOIDA, which offers help to its membership to obtain their own authority, has also witnessed an uptick in the number of members seeking to obtain their own authority. Most of the new carriers which have entered the industry over the past two years have been single-truck owner-operators. Graph 2 depicts the subtle change in the type of operation amongst OOIDA's owner-operator members overall.

The average age of the owner-operator member has continued to increase through the past several OOMP surveys, from 48 years old in 1998 to 59 years old in 2022. Nevertheless, it is important to note the difference in the calculation from preceding years. In the past, OOFI simply presented the question to the survey respondents, but in 2018 OOFI began deriving the average age of owner-operator members by filtering the membership database for those who either operated under their own authority or leased

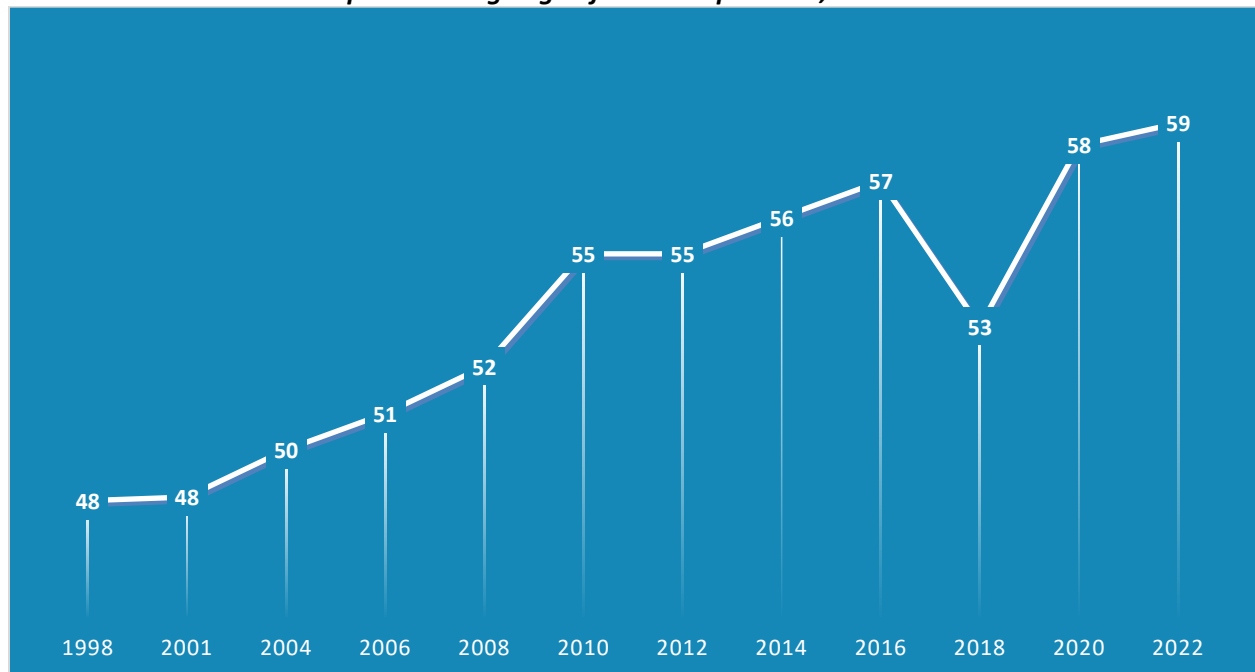
⁷ Lyndon Finney, "Surging Ahead: Number of new trucking companies shattering records," The Trucker (Feb 24, 2022), <https://www.thetrucker.com/trucking-news/truckload-authority/trends-in-trucking/surging-ahead-number-of-new-trucking-companies-shattering-records>

their truck to a carrier. While the average age decreased greatly in 2018, effectively reversing the previous trend as shown in Graph 3, it rose again in 2020 and in 2022.

Graph 2: Type of Operation, 2020-2022



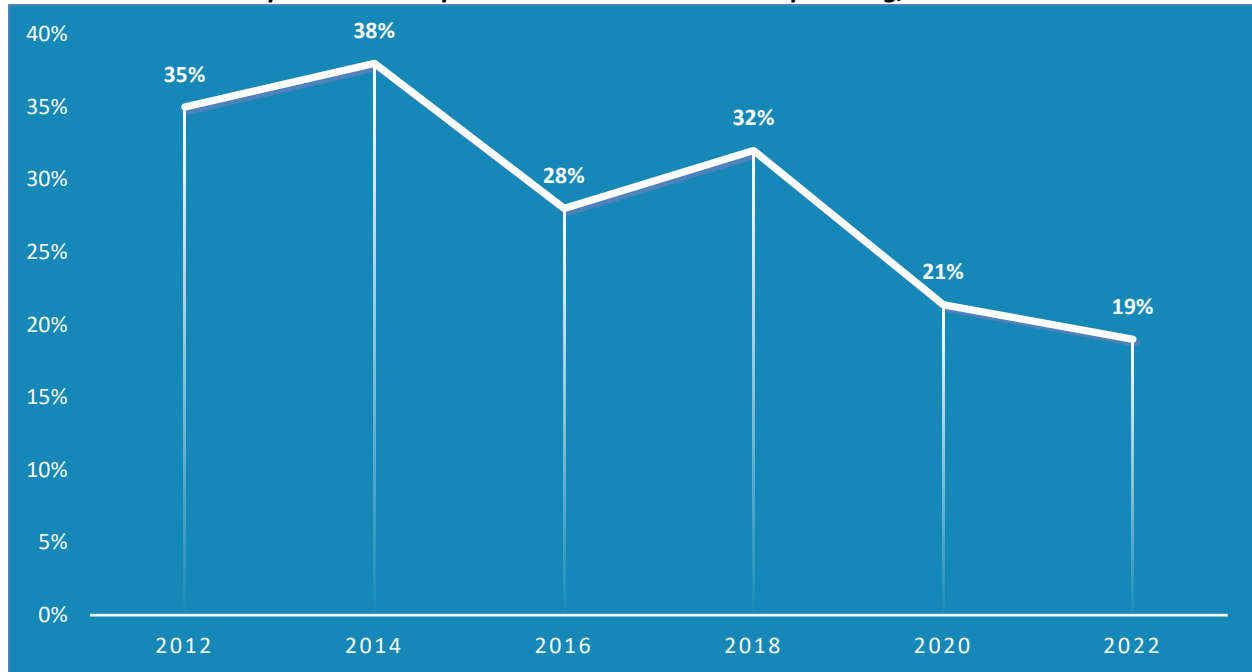
Graph 3: Average age of Owner-Operators, 1998-2022



In preparing for retirement, the percentage of members stating that they have no retirement planning has continued to decline over the past ten years, from 35 percent in 2012 to 19 percent in 2022. For those with a retirement plan, both those under their own authority and those leased-on were more likely to rely

upon social security to secure their retirement opposed to fleet owners, who were more likely to employ an individual retirement arrangement (IRA). Respondents overall were ahead of the curve in terms of retirement as statistics demonstrate that 33 percent of Americans do not have any retirement savings.⁸

Graph 4: Owner-operators without retirement planning, 2012-2022



⁸ Mira Rakicevic, "30 Revealing Retirement Statistics & Facts for 2020," MedAlertHelp (accessed Aug 26, 2020), <https://medalerthelp.org/blog/retirement-statistics/#:~:text=15%25%20of%20the%20US%20population%20is%20retired.%2033%25,56%25%20of%20retirees%20fully%20retired%20before%20age%2065.>

2. Management of Business

The truckload (TL) business model, which has continued to be the primary niche for both owner-operators under their own authority and those leased-on to a carrier, has historically dominated the owner-operator segment of the trucking industry. Overall, 71 percent of the respondents listed TL as their primary business model while 6 percent indicated that they operate less than truckload (LTL) and another 13 percent were power only. The power only segment has increasingly become more popular, especially among leased-on owner-operators, as a way to reduce waste in the form of detention time and costs.

Since 1998, the annual gross income for the average owner-operator has continued to increase, from \$100,000, or \$0.96 per mile, to \$258,000, or \$2.50 per mile, in 2022. However, their annual gross expenses have increased too, as they have almost quadrupled over the same time period from \$50,000 (\$0.48 per miles) to \$187,000 (\$1.81 per mile). This is because the cost of items such as trucks, trailers, etc. have continued to increase over the past two decades. Tolls for example have tripled since 2010, growing from \$800 to \$2,400. Nevertheless, the typical net income has consistently remained between \$40,000 and \$50,000 per year. The last couple surveys however have marked an increase to between \$60,000 and \$70,000. This might be due to the record freight rates over the past few years even despite the increase in expenses.

For owner-operators under their own authority, the average gross income was \$222,300 (\$2.23 per mile), while the average gross expense was \$154,600 (\$1.55 per mile), resulting in a net revenue of \$67,700 (\$0.68). These figures amounted to an increase of 18 percent, 24 percent, and 6 percent, respectively, compared to the previous survey. The overall income for the typical leased-on owner-operator was lower, \$194,700 (\$1.80 per mile), so too was their average gross expense, \$113,700 (\$1.05 per mile), equating to a net revenue of \$81,000 (\$0.75).

Table 1: Owner-Operator Income and Expense

Annual Income	Own Authority	Leased On	Overall
Gross Income	\$222,280	\$194,699	\$258,119
Gross Expense	\$154,603	\$113,662	\$187,195
Net Income	\$64,560	\$55,833	\$64,453

Table 2: Owner-Operator Income and Expense per Mile

Per Mile	Own Authority	Leased On	Overall
Gross Income per Mile	\$2.23	\$1.80	\$2.50
Gross Expense per Mile	\$1.55	\$1.05	\$1.81
Net Income per Mile	\$0.68	\$0.75	\$0.69

The average owner-operator member obtained their first CDL or chauffeur's license when they were 26 years old, meaning that they have been involved in trucking for 33 years overall, and have been an owner-operator for 19 years. The average respondent became an owner-operator at age 38, which is two years older than the previous survey, and most plan to retire from trucking at age 69.

In the previous 12-months, the owner-operator under their own authority traveled 103,000 miles, of which 17,600, or 17 percent, were deadhead miles, meaning that the member drove their truck without a load. This marked a 10 percent decrease in loaded miles from 2020, albeit with a higher compensation per mile, meaning owner-operators were making more money on less miles, and a 32 percent decrease in deadhead miles, which is a positive trend that will ultimately benefit an owner-operator's bottom line. For years OOFI has fought against the old mantra that a truck driver needs to run more miles in order to be successful. Instead, OOFI teaches in our educational material that a trucker needs to get paid more for the miles that they run. This appears to be the case for the 2022 OOMP Survey results.

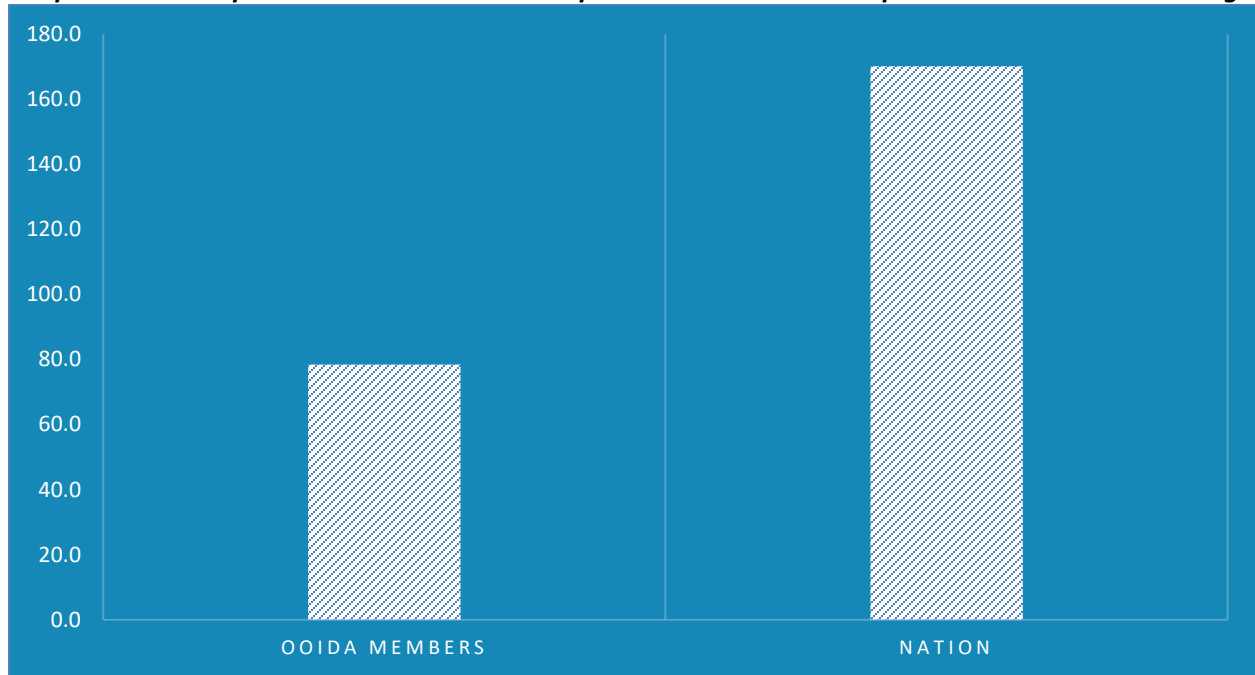
According to OOFI's *Freight Rate Survey*, many owner-operator members indicated a desire to make changes in their business plan by increasing the efficiency of their business, whether through more research into freight markets, changing lanes or regions, being more selective of their routes and securing backhauls, becoming more specialized, or simply focusing to reduce expenses and deadhead miles. This seems to have occurred across the different operational types as those under their own authority, those leased-on, and those who identify as fleet owners, saw a decrease of 11 percent, 6 percent, and 22 percent respectively in terms of loaded miles; a decrease of 44 percent, 15 percent, and 53 percent respectively in deadhead miles; and a decrease of 18 percent, 8 percent, and 37 percent in overall miles.

Table 3: Business Experience of the Owner-Operator

Business Experience	Own Authority	Leased On	Overall
Age of acquiring CDL or chauffeur lic.	25	26	26
Years in the trucking industry	33	32	33
Age at becoming an owner-operator	25	39	38
Years of being an owner-operator	20	18	19
Miles driven last year	83,803	88,349	85,626
Deadhead miles driven last year	15,755	19,566	17,600
Total miles driver last year	99,558	107,915	103,226
Miles in career	2,712,225	2,840,865	2,777,247

According to FMCSA's 2019 *Large Truck and Bus Crash Facts*, after all crashes (i.e., fatal, injury, and property-damage only) and miles are figured, the overall crash rate for the trucking industry is 170.1 crashes per 100 million vehicle miles traveled (VMT). The owner-operator segment of the industry however has consistently been among the safest drivers in the nation with a rate of 78.5 crashes per 100 million VMT, which is two times better than the national crash rate for the overall trucking industry. In fact, after figuring for all career miles driven, OOIDA owner-operator members traveled on average roughly 3 million miles between accidents (930,377,585 miles reported by respondents for their career ÷ 307 accidents reported for their career = 3,030,546 miles) for a rate of 33 crashes per 100 million VMT.

In terms of both length of haul and nights away from home, owner-operator members under their own authority tended to operate around 500 miles or less and stay at home between 0 and 150 nights a year. Conversely, those members who lease their truck onto a carrier typically operated over 500 miles and spent over 200 nights away from home.

Graph 5: Owner-Operator Member Crash Rate per 100 million VMT compared to the National Average**Table 4: Load length of Haul**

Typical Length of Haul	Own Authority	Leased On	Overall
1-150 miles	16%	9%	13%
151-500 miles	34%	26%	29%
501-1,000 miles	25%	36%	31%
1,001+ miles	25%	29%	26%

Table 5: Nights away from home

Nights away	Own Authority	Leased On	Overall
Less than 50	23%	14%	20%
50 to 100	13%	5%	10%
101 to 150	10%	12%	11%
151 to 200	19%	20%	18%
201 to 250	29%	16%	16%
251 to 300	12%	18%	14%
300+	5%	16%	10%

Since the implementation of the first OOMP Survey in 1998, the standard owner-operator business model has largely remained a solo operation with loads weighing an average of 40,000 pounds or more. However, the degree to which members participate in solo operations compared to team driving has continued to increase from 88 percent in 1998 to 98 percent in 2022. This trend may continue until there is virtually no team driving at all due to the market shift in operations to more regional moves as opposed

to long-haul due to the increase in e-commerce. However, time will tell. Most owner-operator members continue to run in the northcentral and southcentral regions of the U.S. as indicated in Figures 1 through 4.

Figure 1: Primary Operation by Region

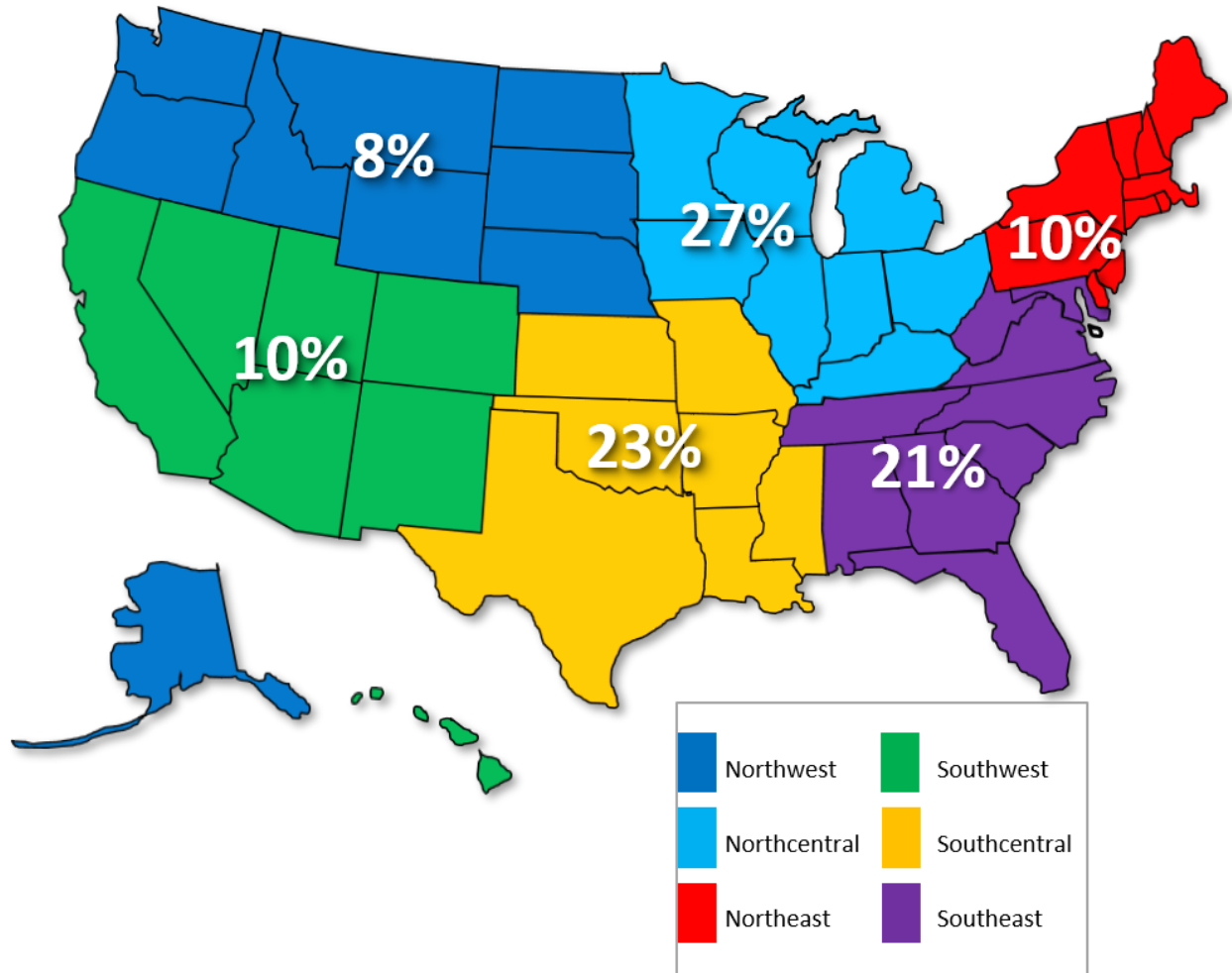


Figure 2: Average Total Miles by Region

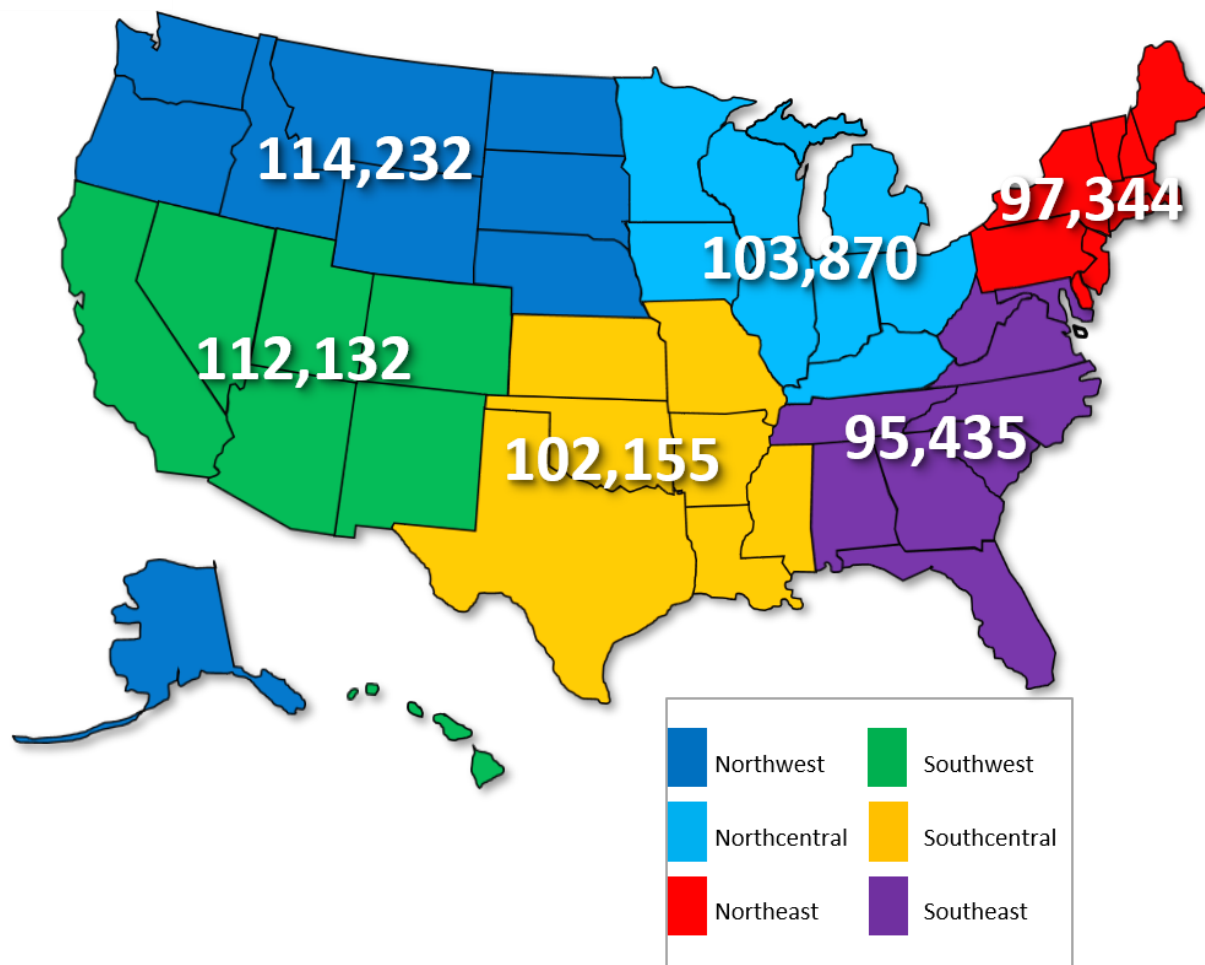
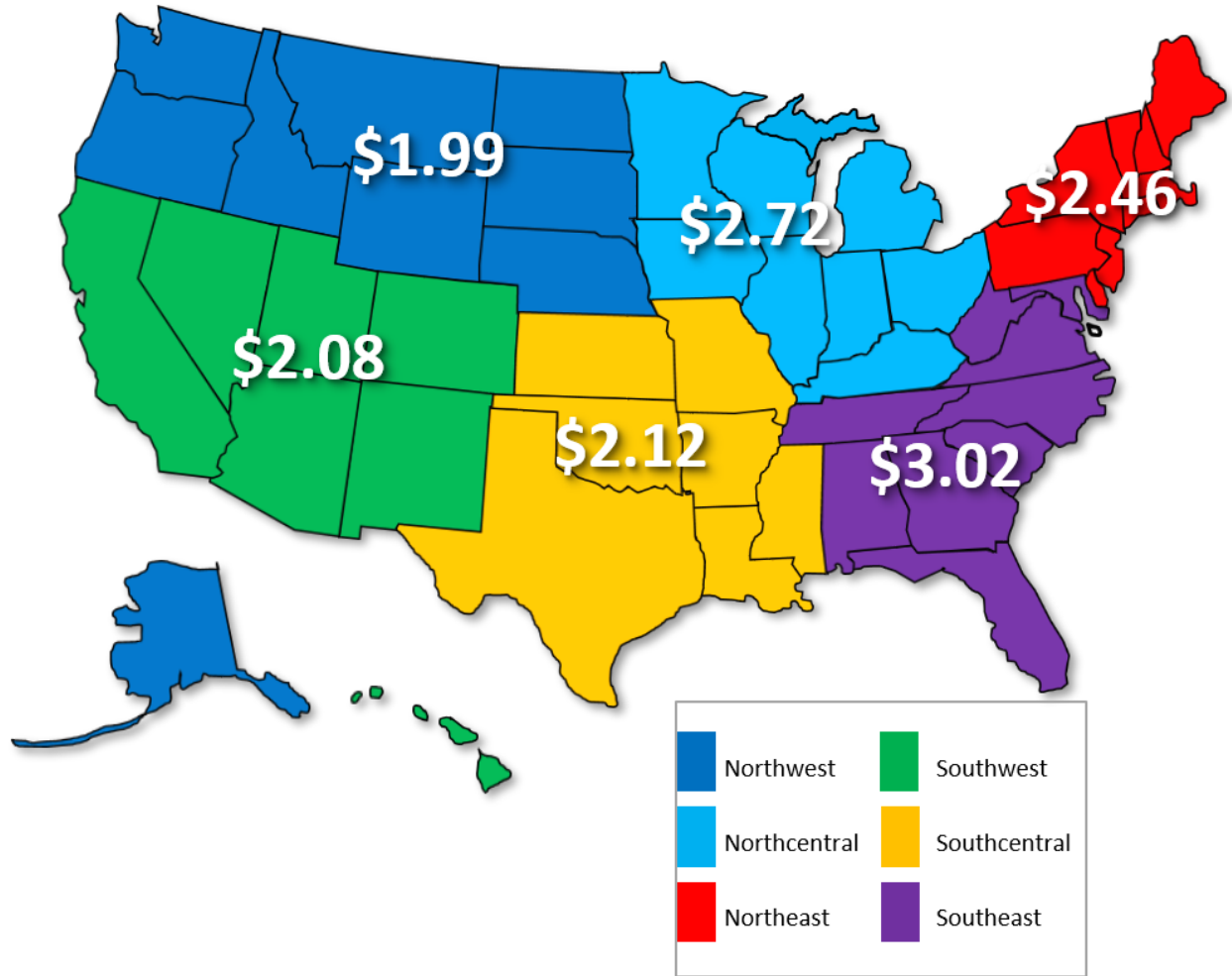
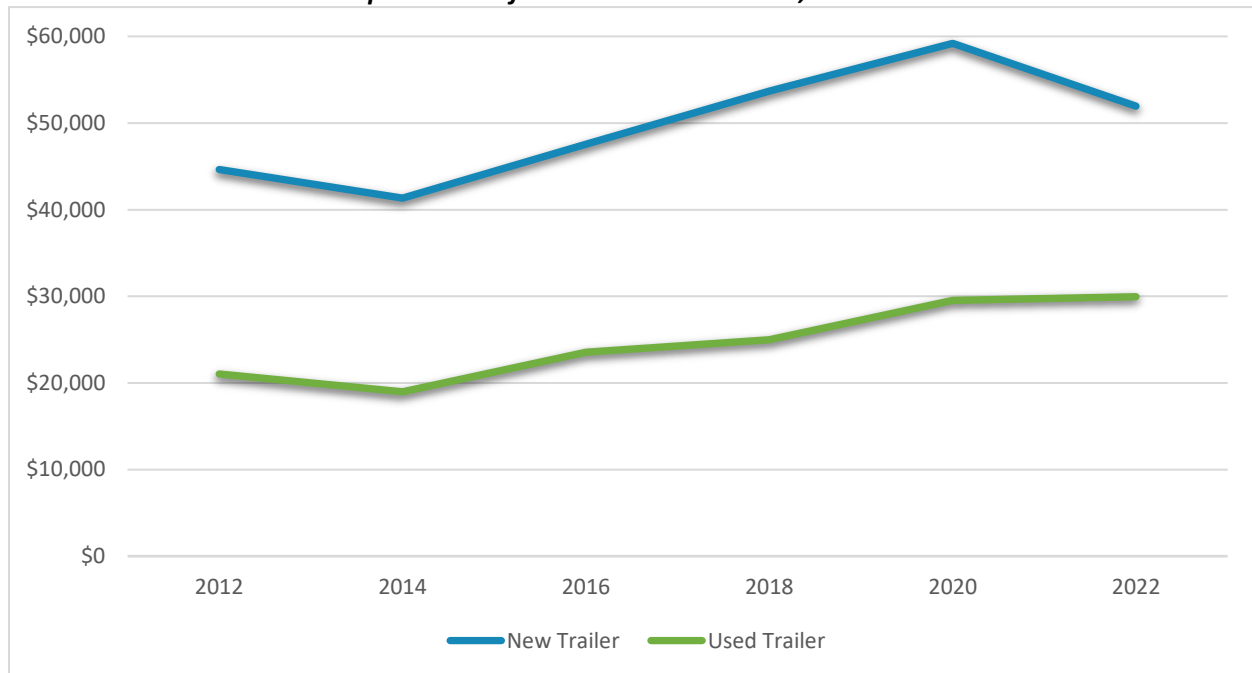


Figure 3: Gross Revenue Per Mile by Region



Whereas the vast majority of owner-operator members under their authority own at least one trailer (80%), only 40 percent of those members who are leased-on own a trailer. Of those who do own their trailer, 64 percent purchased a used one. The cost of used trailers has continued to increase over the past ten years, from \$21,000 in 2012 to \$30,000 in 2022. While new trailers have also grown more expensive over the same time period, the cost did decrease from the previous survey as shown in Graph 6. The average owner-operator member primarily pulls a dry van trailer, followed by flatbed trailers and refrigerated trailers, also called reefers. Those respondents under their own authority and those leased-on tended to pull dry van trailers, while fleet owners typically pulled flatbed trailers more than anything else.

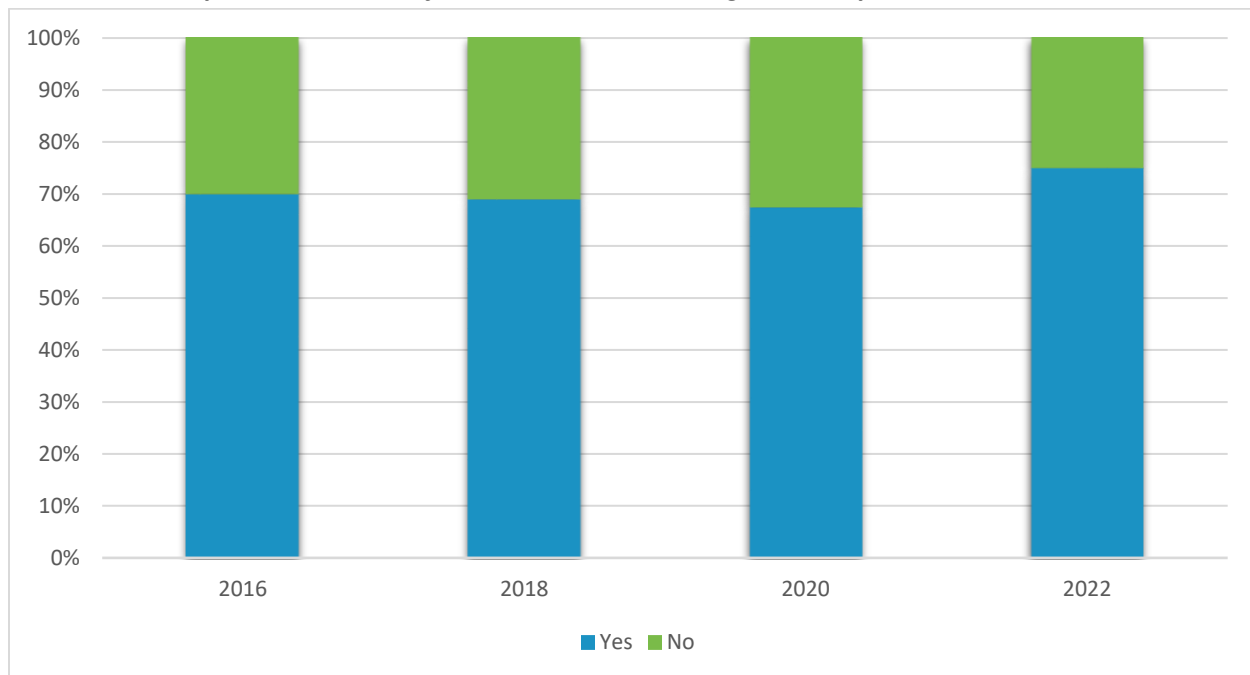
Graph 6: Cost of New and Used Trailers, 2012-2022



3. Medical Issues

Medical insurance coverage for owner-operators has been low historically. Though this trend has largely continued despite the promulgation of the Affordable Care Act (ACA) in 2014, the 2022 OOMP Survey saw a significant increase in the percentage of members who stated that had health insurance, from 67 percent in 2020 to 75 percent in 2022. This marks the largest percentage since OOFI began asking this question in 2014. One possible explanation for this increase is the advent of the novel coronavirus, also known as COVID-19, which the World Health Organization officially declared COVID-19 a pandemic on March 11, 2020.

Graph 7: Prevalence of Health Insurance among Owner-Operators, 2016-2022



The average owner-operator member is 70 inches tall (5 feet and 10 inches) and weighs 224 pounds, which is consistent with past surveys. This resulted in an average Body Mass Index (BMI) of 32.1, which is classified as obese. BMI has become increasingly problematic for the owner-operator since the inception of the National Registry of Certified Medical Examiners in May 2014, as some certified examiners focus solely on a driver's BMI when considering a recommendation for sleep apnea testing.

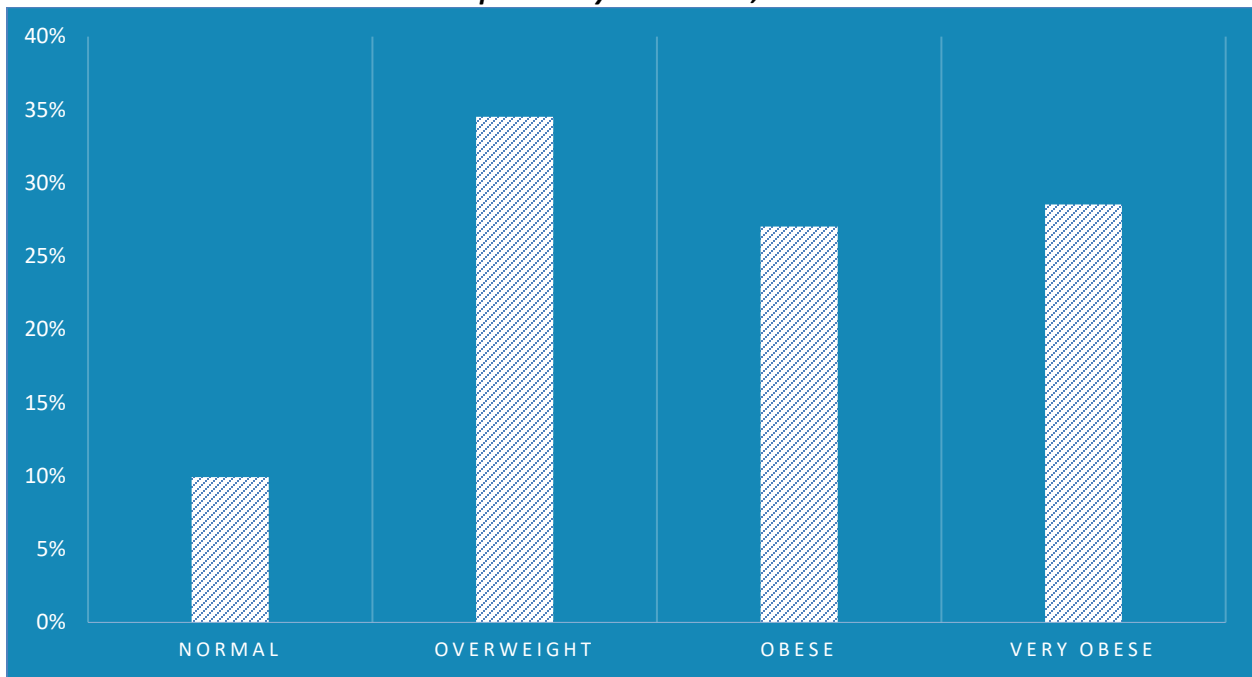
According to the Center of Disease Control and Prevention (CDC), an individual with a BMI between 18.5 and 25 is considered to be healthy. Nevertheless, a study released by UCLA in 2016 concluded that BMI mislabels approximately 54 million Americans as overweight or obese. The lead author for the study stated, "This should be a final nail in the coffin for BMI. The public is used to hearing 'obesity,' and they mistakenly see it as a death sentence, but obesity is just a number based on BMI, and we think BMI is just a really crude and terrible indicator of someone's health."⁹ The study also found that more than 30

⁹ Amina Khan, "BMI mislabels 54 million Americans as 'overweight' or 'obese,' study says," *Los Angeles Times* (Feb 4, 2016), <http://www.latimes.com/science/sciencenow/la-sci-sn-bmi-does-not-measure-health-20160204-story.html>

percent of those with a BMI in the “normal” range (18.5-24.9), about 20.7 million people, were actually unhealthy based on their other health data, and more than 2 million people who are considered “very obese” by virtue of having a BMI of 35 or greater were actually healthy.¹⁰ It is important that BMI is not the only indicator for OSA screening.

Recognizing that a majority of owner-operators fall into the overweight and obese categories and that certain groups desire to mandate sleep apnea testing for those drivers who are obese and have a neck circumference of 17 inches or greater, OOIF asked respondents about their experiences with obstructive sleep apnea (OSA). OOIF learned that 56 percent of respondents were either obese or very obese, 20 percent have a neck size exceeding 17 inches, and 9 percent have undergone OSA screening at some point in their career. Overall, 7 percent were currently receiving treatment for OSA. However, only 13 percent indicated that their medical policy covers OSA screening and equipment, while an additional 56 percent were unsure whether their policy covered OSA or not.

Graph 8: Body Mass Index, 2022



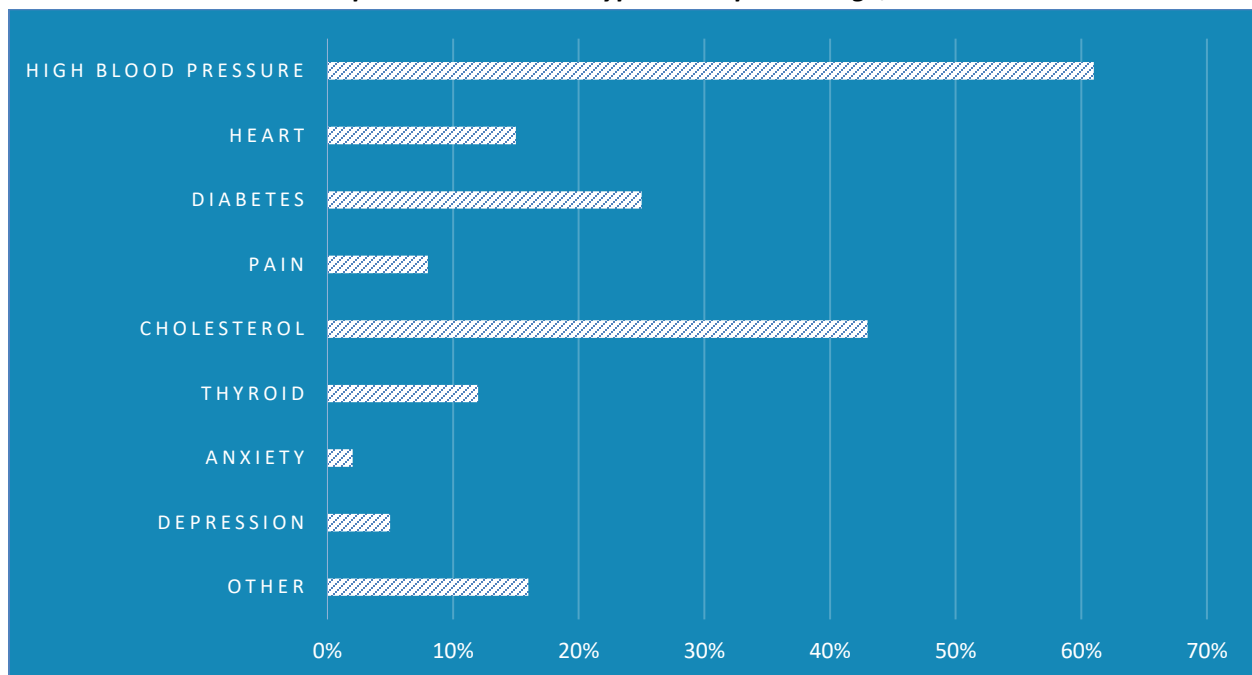
It is important to note that OSA has little, if any, connection with safety performance. FMCSA’s own studies in particular have found that there is “no association between sleep apnea, as measured by the apnea/hypopnea index, and commercial motor vehicle crashes. Patients with sleep apnea had no greater probability of having a crash than patients without sleep apnea, either before or after their diagnosis. Drivers with sleep apnea were also not found to be at an increased risk for multiple crashes, nor were

¹⁰ Stuart Wolpert, “Don’t use BMI to determine whether people are healthy, UCLA-led study says,” UCLA Newsroom (Feb 4, 2016), <http://newsroom.ucla.edu/releases/dont-use-body-mass-index-to-determine-whether-people-are-healthy-ucla-led-study-says>

crash rates impacted by the prevalence of apnea. No link between the severity of sleep apnea and traffic crashes.¹¹

In January 2014, NIOSH published a study entitled *The National Survey of U.S. Long-Haul Truck Driver Health and Injury*, which found that 32% of drivers have hypertension.¹² According to the 2022 OOMP Survey, 50 percent are currently taking a maintenance type prescription, which represents a nearly 6 percent decrease from 2020. While 50 percent appears to be high, 48.3 percent of all people between the ages of 20 and 59 and 88.4 percent of those over 60 use at least one prescription drug according to 1 2008 CDC study. Looking at these percentages the average owner-operator is again in the norm or even below. Of those drivers that took prescriptions, 61 percent indicated that they were for high blood pressure, 43 percent were for cholesterol, 25 percent were for diabetes, 15 percent were for heart, 12 percent were for thyroid, 8 percent were for pain, 5 percent were for other, 4 percent were for depression, and 2 percent were for anxiety.

Graph 9: Maintenance Type Prescription Usage, 2022



¹¹ Lawrence C. Barr et al., *Sleep Apnea Crash Risk Study*, FMSCA (2004).

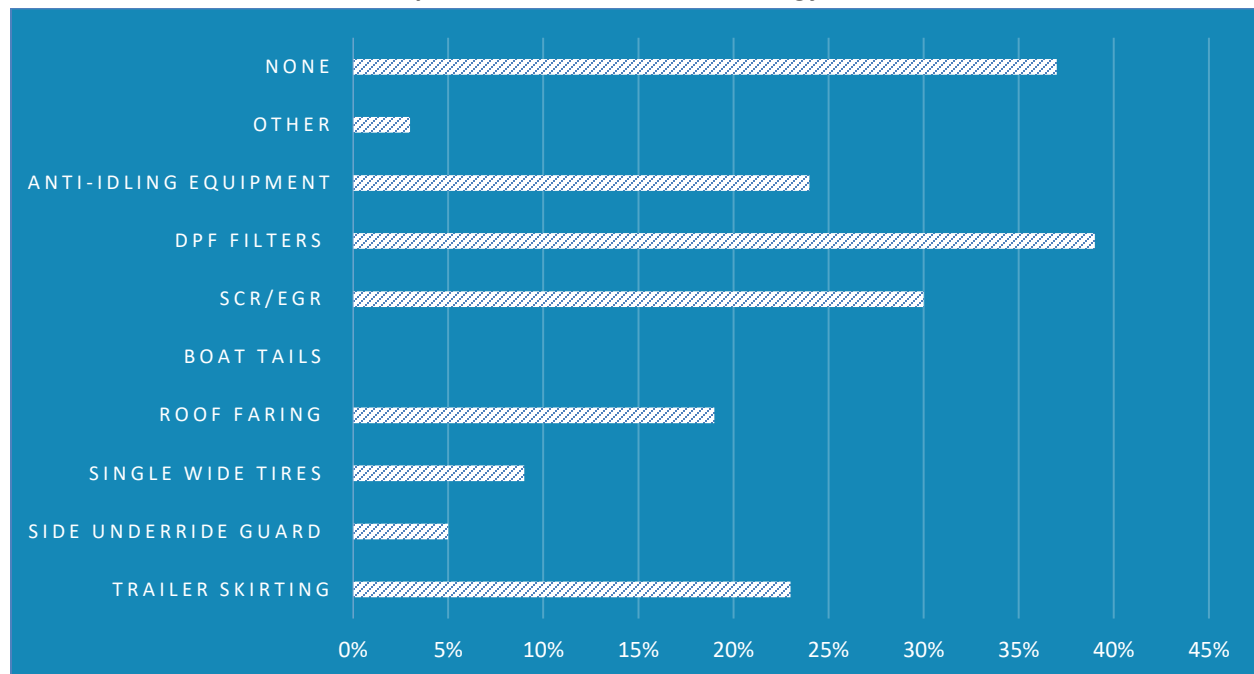
¹² *The National Survey of Long-Haul Truck Driver Health and Injury*

4. Environmental Issues

Clean air is a priority for everyone, especially for owner-operators, but they request that the technology used in heavy-duty trucks to improve air quality be affordable and reliable. Between 1995 and 2016, the U.S. Environmental Protection Agency (EPA) promulgated more than 48 federal air-quality regulations, many of them targeting heavy-duty trucks, such as the “2007 Highway Rule.” In May 2010, President Barack Obama announced the first ever fuel efficiency and greenhouse gas emission (GHG) standards for model year (MY) 2014 through 2018 medium- and heavy-duty trucks. President Obama announced the second round of GHG and fuel economy standards known as GHG Phase II on February 18, 2014. This phase included both technology-forcing requirements, similar to the 2007 Highway Rule that dramatically increased the cost of new trucks, and trailers as part of the total package.

On August 5, 2021, EPA announced a new plan to reduce GHG emissions and other harmful air pollutants from heavy-duty trucks through a series of rulemakings which are to take place over the next three years. The first rulemaking, which published March 28, 2022, is set to apply to heavy-duty vehicles starting in MY 2027. This rule will set new standards for criteria pollutants for the entire sector as well as targeted updates to the current GHG emissions standards. A second rule would set “Phase III” GHG emission standards for new heavy-duty vehicles sold as soon as MY 2030 that will be significantly stronger than the MY 2027 GHG standards.¹³ While the government’s emission regulations have helped increase the average price of a new truck almost 52 percent since 2001, these upcoming rules have the potential to raise the price of a new truck even higher.

Graph 10: Environmental Technology, 2022



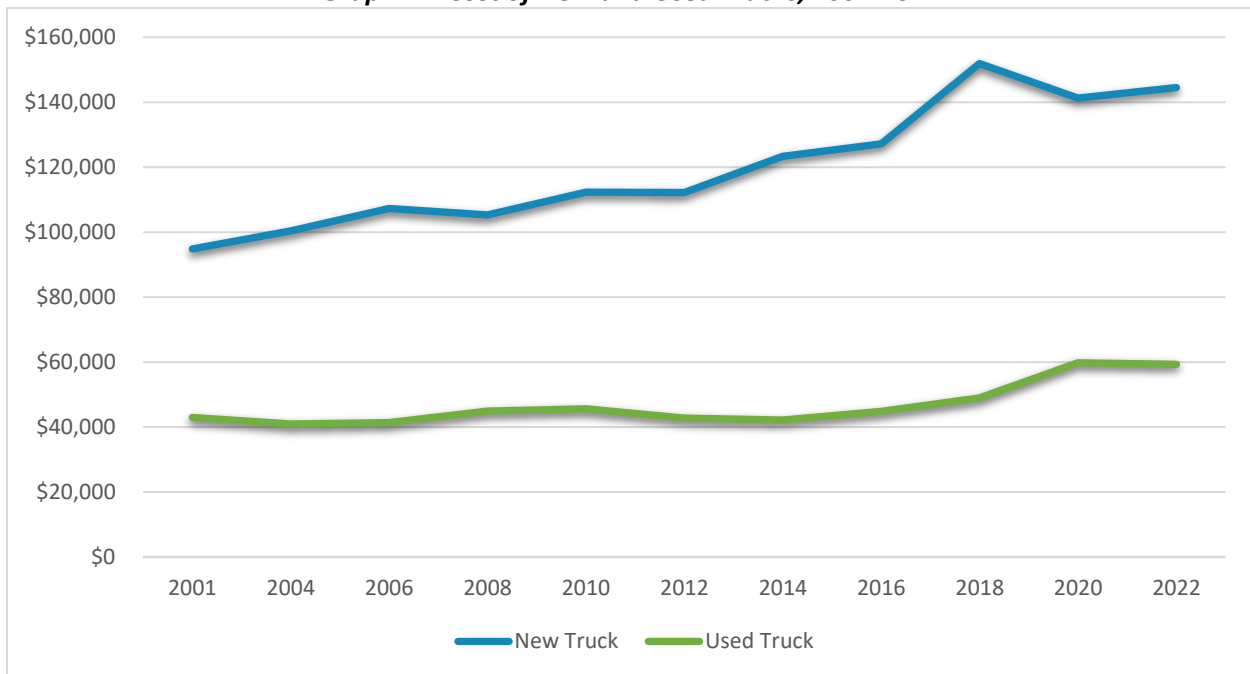
¹³ <https://www.epa.gov/regulations-emissions-vehicles-and-engines/clean-trucks-plan>

According to the 2022 OOMP Survey, 37 percent of owner-operator members did not have environmental technology, such as anti-idling equipment, diesel particulate filters (DPF), trailer skirts, etc., equipped on their tractor and or trailer. For those who did have such equipment, DPFs, selective catalytic reduction (SCR) and or exhaust gas recirculation (EGR), anti-idling equipment, and trailer skirting were the most commonly equipped technologies, respectively. However, only 36 percent indicated that they were able to receive a return-on-investment, and for those who did, it took an average of 21 months before they did so.

5. Your Truck

In order to become an owner-operator, one must first own his or her own truck. However, this is becoming more difficult as the average price of a new truck has increased almost 52 percent since 2001 due in part to the ever more stringent greenhouse gas emission and fuel economy standards established by the EPA and the National Highway Traffic Safety Administration, as well as the introduction of advanced driver assistance systems (ADAS). While the cost of new vehicles has grown exponentially, Graph 10 demonstrates the cost of used trucks has also increased over the years, albeit at a slower pace, which is why 68 percent of respondents purchased a used truck compared to a new truck or even a glider. It is important to note that even though costs have increased for both new and used trucks, the percentage of members who have paid their truck off has also increased, from 58 percent in 2020 to 63 percent in 2022.

Graph 11: Cost of New and Used Trucks, 2001-2022



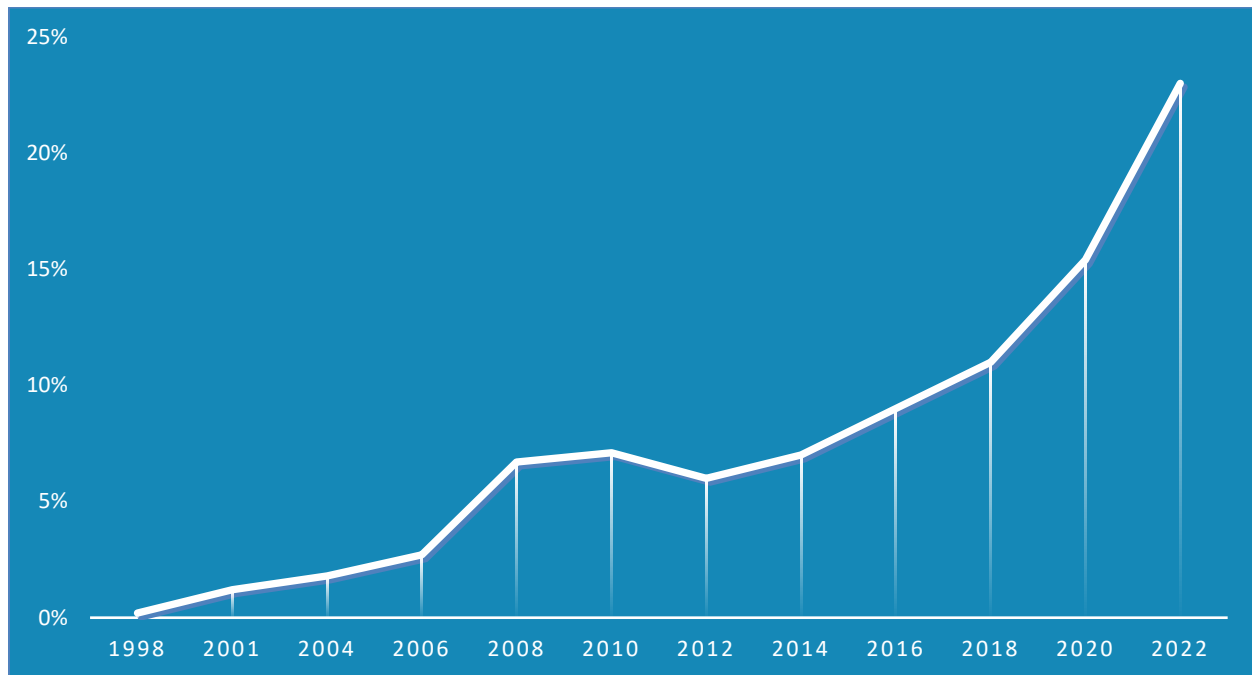
OOFI has noticed a strong tendency over the years for owner-operator members to continue to drive, or hold onto, their present truck, which was 12 years old on average, rather than purchasing a new vehicle. In 2022, owner-operators responded that their truck had traveled approximately 1.2 million miles since it was manufactured, which is more than double the mileage that was reported in 2001. The fuel mileage however has stayed relatively consistent with the average member receiving around 6.4 miles per gallon. This equates to over 16,000 gallons of fuel and \$53,000 in fuel expenses, or about 28 percent of gross expenses.¹⁴

Owner-operator members are more likely to drive a Class 8 truck with a gross vehicle weight rating of 33,001 pounds or greater than any other class of vehicle. Moreover, the average member is more likely

¹⁴ 16,129 gallons of fuel purchased × \$3.29 (the average cost per gallon of diesel fuel for the U.S. for 2021 according to U.S. Energy Information Administration <https://www.eia.gov/petroleum/gasdiesel/>) = \$53,012.20.

to have over 450 horsepower and a higher number of gears. Nevertheless, the number of automatic or partial automatic transmissions continues to rise from 0 percent in 1998 to 23 percent in 2022 as depicted in Graph 12. This was especially true for those owner-operators leased-on to carrier, as 30 percent indicated that they have an automatic or partial automatic transmission.

Graph 12: Prevalence of Automatic or Partial Automatic transmission, 2022

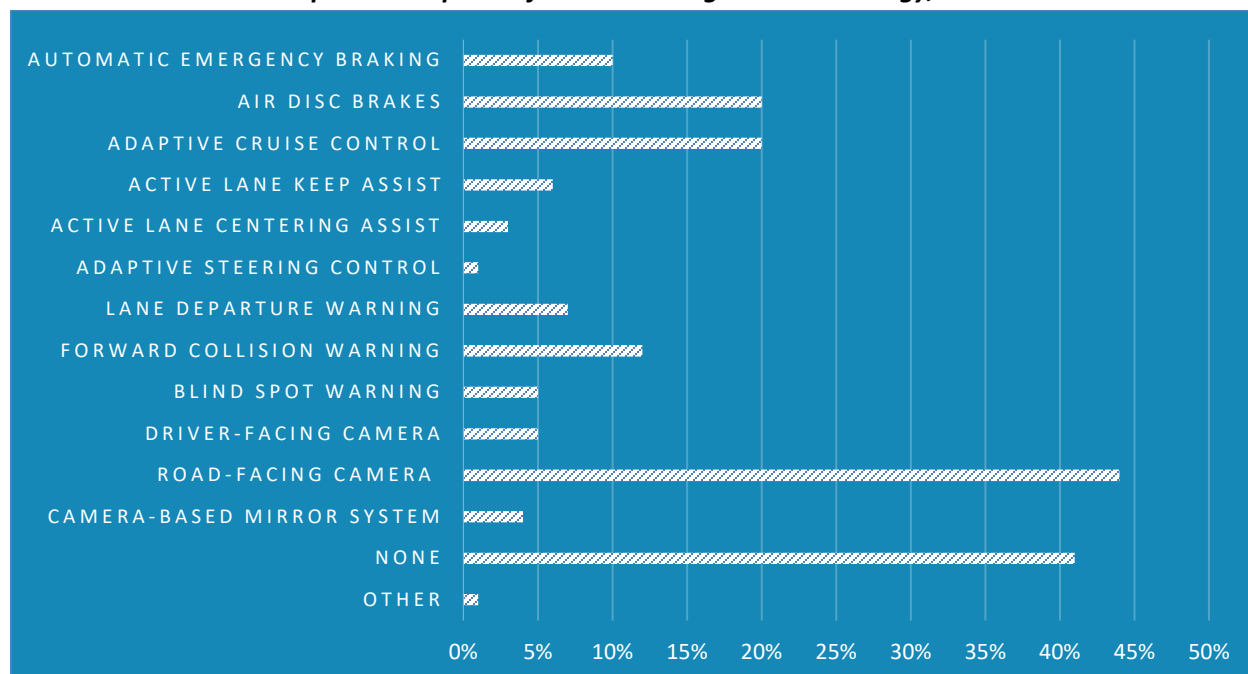


Although the prevalence of technology has grown in the trucking industry over the years, especially with the advent of automated driving systems and FMCSA's *Tech-Celerate Now*, a national outreach campaign that the Agency designed to help accelerate the adoption of promising ADAS technology within trucking, the owner-operator segment of the industry remains vastly different from that of the large motor carriers. When asked if they had ADAS technologies equipped on their truck, such as automatic emergency braking, lane departure warning etc., 41 percent stated they did not. This might be due to the fact that most members felt that these technologies either had no effect on safety (43%) or even reduced safety (20%). However, it is important to note the rapid growth in the prevalence of road-facing cameras, which increased from 36 percent in 2020 to 44 percent in 2022. Moreover, the vast majority (77%) also do not have a maximum speed setting on their truck, i.e. a speed limiter. For those few who did, the maximum setting was 75 miles per hour.

Considering the significant amount of capital required to purchase a truck and start a business, some individuals elect to enter into a lease-purchase agreement in an attempt to jump start their career. Yet, this is not without risk. In a lease-purchase agreement, a truck driver will sign a contract with a third-party, often a motor carrier, in order to lease a truck with the hopes of one day owning the commercial vehicle. For various reasons however, the truck driver does not always obtain the title of the truck. According to the 2022 OOMP Survey, 29 percent of owner-operator members have entered into a lease-purchase agreement at some point in their career, with 49 percent actually obtaining the title. Of those

who have signed such an agreement, 22 percent are currently in a lease-purchase agreement. These types of agreements tend to be more common for leased-on owner-operators and those who operate northwest or southeast regions of the country.

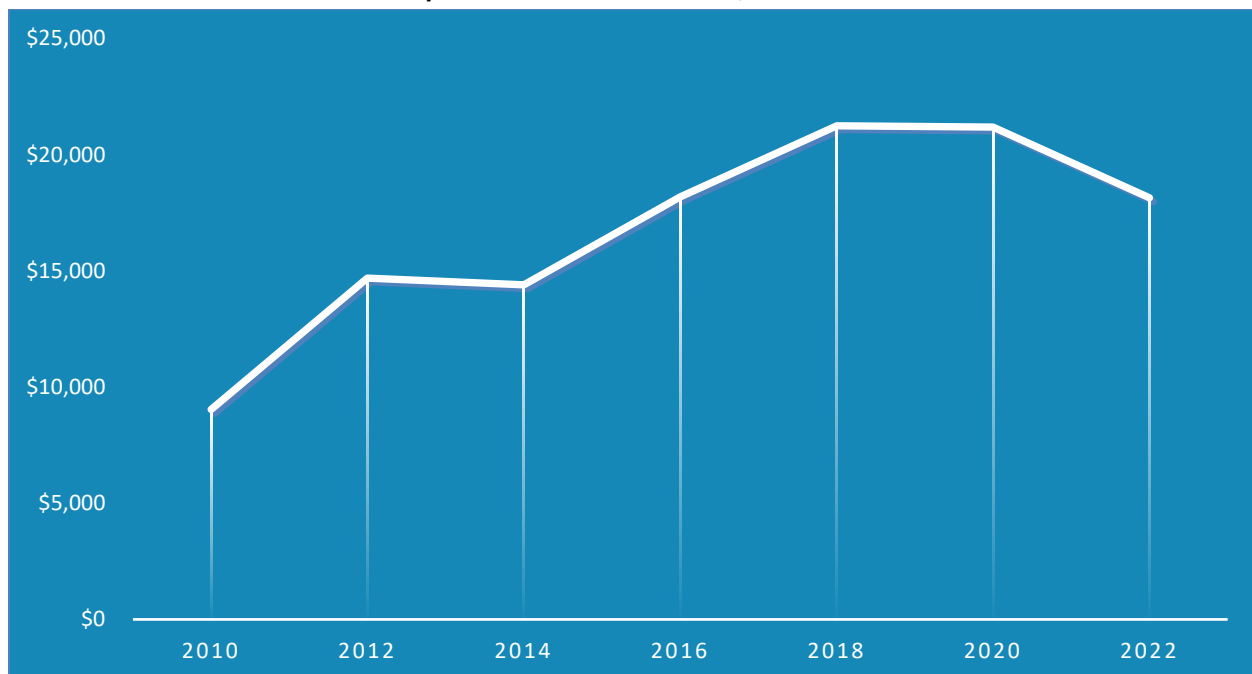
Graph 13: Adoption of Collision Mitigation Technology, 2022



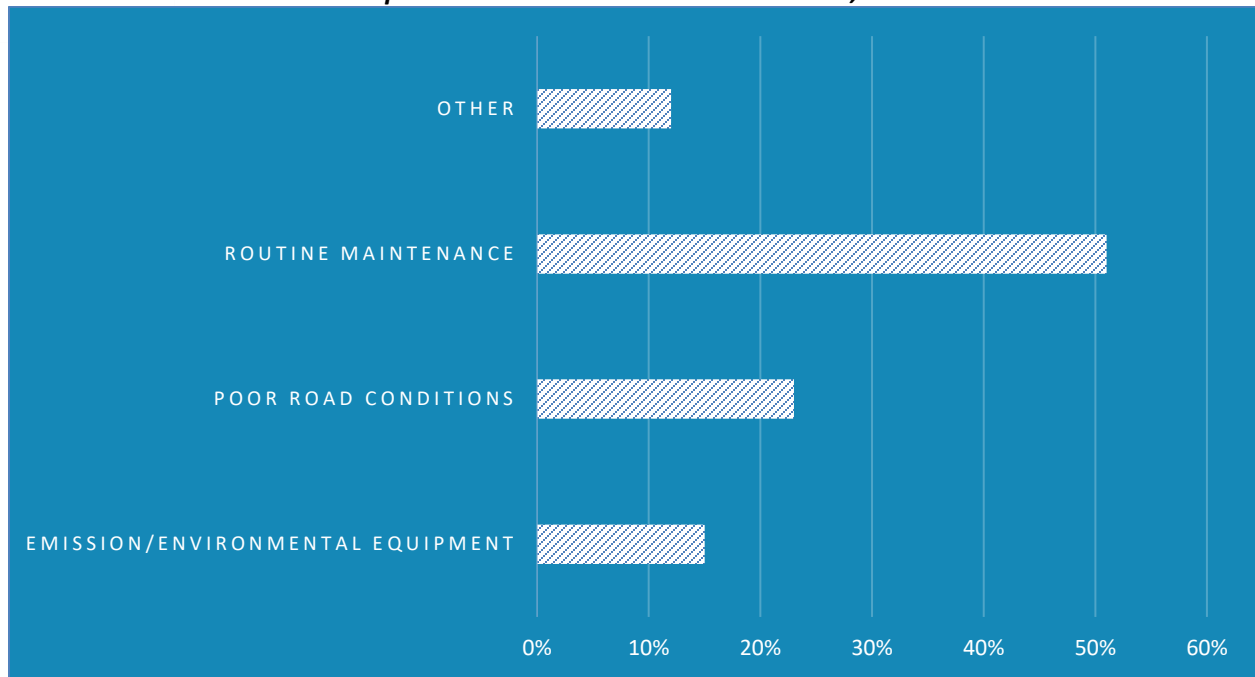
6. Maintenance

Most successful owner-operators have their trucks on a regular maintenance schedule as they recognize the necessity of ensuring that their truck is fit and safe to operate on the roadways. While the cost of maintenance decreased 14 percent overall from 2020, the cost per mile actually increased from \$0.17 per mile to \$0.18 per mile, indicating that the decrease in overall maintenance costs was due to the fact that the average owner-operator member drove fewer miles in 2022. In fact, the cost of maintenance was directly related to an owner-operators standard length of haul, as well as which region of the country that they operated in. Those who traveled 500 miles or more per trip spent \$19,000 in maintenance, compared to \$15,600 for those who traveled under 500 miles. Moreover, those operating in the southwest and northcentral regions of the U.S. spent over \$0.21 per mile in maintenance costs. Those operating in the northwest experienced the lowest costs at \$0.13 per mile.

Graph 14: Maintenance Costs, 2010-2022



Overall, the average owner-operator member spent \$18,000 on maintenance, which included nearly \$3,000 due to emissions or environmental related equipment, \$4,175 due to highway damage or poor road conditions, and \$9,300 on routine maintenance. In fact, maintenance costs accounted for 10 percent of the average owner-operator member's annual gross expenses. These costs however did not include tire repair and replacement costs. The typical owner-operator under their own authority replaced 13 tires last year, costing \$6,842, compared to those leased-on to a carrier, who replaced 7 tires, costing \$5,149. The discrepancy in the number of tires that members purchased is most likely because those under their own authority are more likely to own their own trailer, while the discrepancy in cost per tire might be because those under their own authority were using recaps. Thus, they have more tires to replace overall than the leased-on owner-operator who only needs to concern themselves with the tires on their tractor.

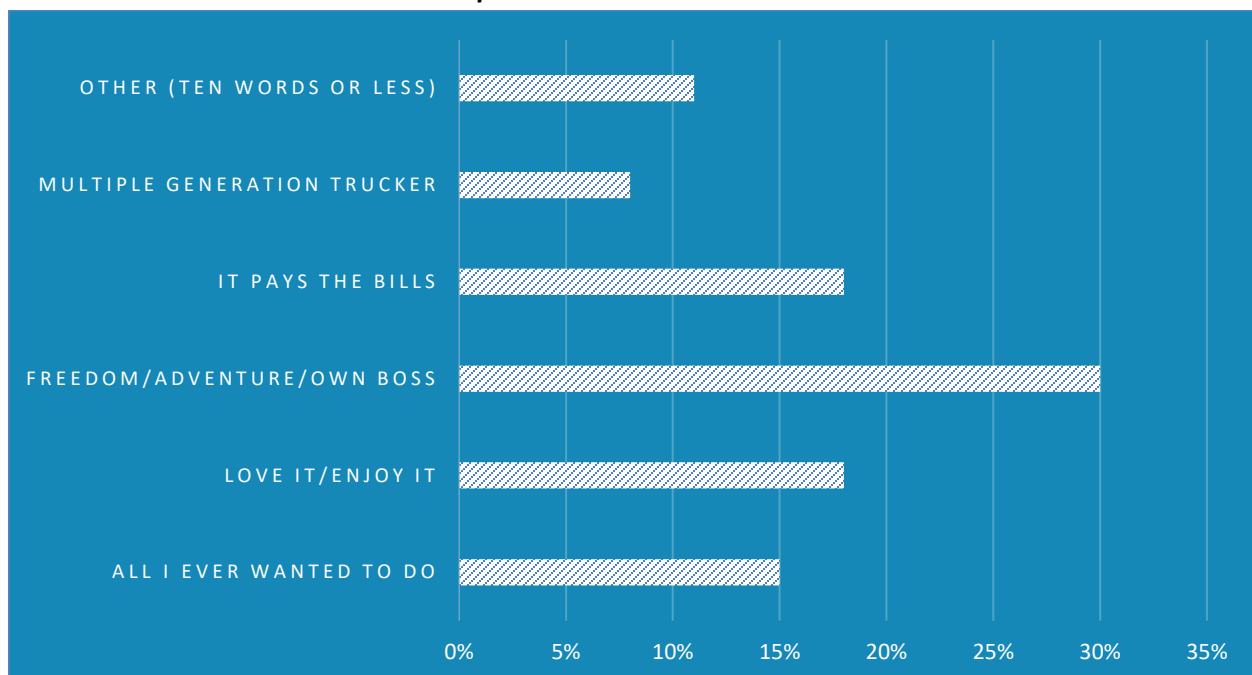
Graph 15: Maintenance Costs Breakdown, 2022

7. Trucker Trivia

The construction and trucking industries have traditionally competed with one another for employees, with workers frequently flipping back and forth between the two. This is probably because both industries share similar backgrounds and difficult working conditions. However, the typical owner-operator's number one occupation prior to entering into the trucking industry, at least for those who did not identify themselves as "always been a trucker," was the military. Owner-operators continue to have a strong military service record, with 32 percent stating that they have served in the military at some point in their life.

The number one reason why owner-operators continue to drive a truck has traditionally been because, "I enjoy/love it." In the more recent surveys however, OOFI has discovered a slight change with 30 percent indicating that the chief reason behind why they have chosen to be a truck driver is the "freedom/adventure/own boss." Another 18 percent selected this occupation because "it pays the bills." These percentages speak volumes on how these owner-operators, with decades of experience, view their industry.

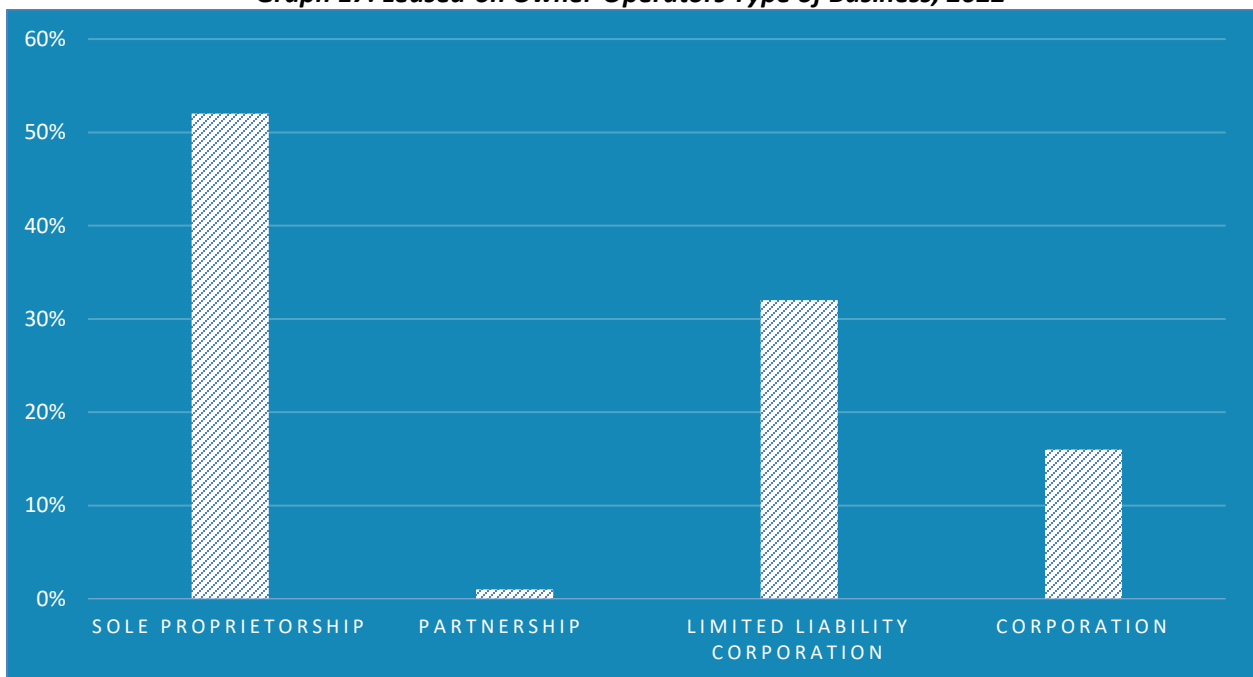
Graph 16: I drive a truck because



8. Leased-On Owner-Operator

OOFI directed a specific set of questions in the 2022 OOMP Survey toward leased-on owner-operators to better understand this unique segment of the industry. For example, unlike those operating under their own authority, members who are leased-on tend to establish their business as a sole proprietorship (52%) rather than a limited liability company. OOFI asked also respondents, “When selecting a carrier to lease on to, what are the most important issues that you consider (1 being the most important and 8 being the least important)?” The members top consideration was freight rates at 1.8, followed by the amount of freight (2.6) and the company’s reputation (3.2). This was consistent with 2020’s survey results. The majority of leased-on owner-operator have been with their present carrier for three years or less (39%), which is slightly less than in 2020 (42%).

Graph 17: Leased-on Owner-Operators Type of Business, 2022

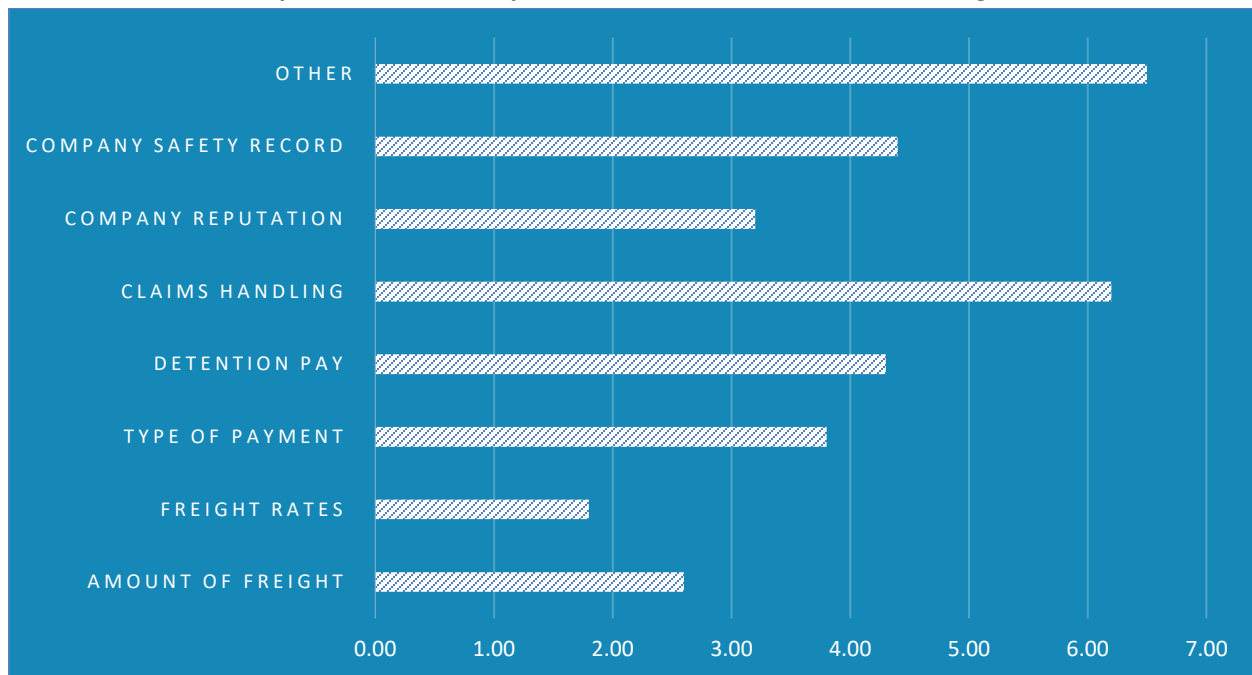


In regards to retention, which is a huge issue in trucking with most large carriers having a turnover rate around 90 percent, 45 percent of leased-on owner-operator members indicated that they have been with 5 or more carriers in their career. When we asked the respondents what the most important issues were that caused them to leave (1 being the most important and 8 being the least important), members stated that low pay (2.1), lack of respect (2.7), and the lack of freight (2.9) were the three most important reasons.

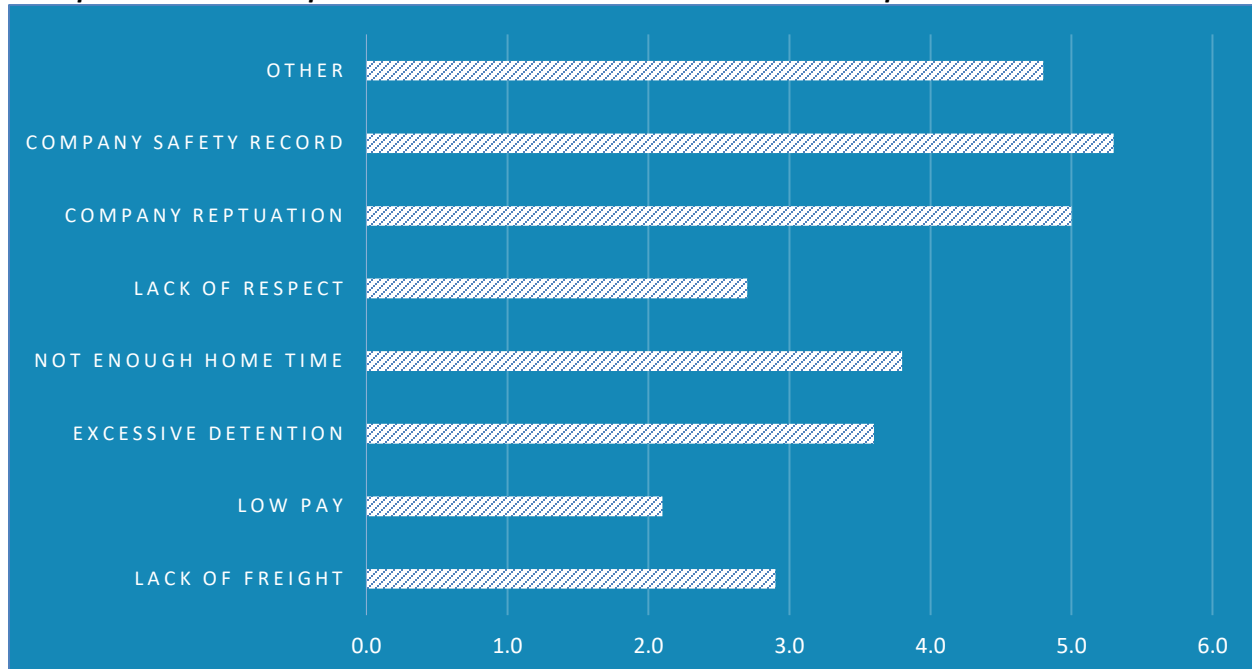
According to FMCSA, 90 percent of all fleets operate ten trucks or less and 96 percent of fleets have twenty-five trucks or less. Regardless of this fact, those members who lease-on to a carrier primarily do so with medium- to large-sized companies, with 54 percent leasing on to motor carriers with between 21 and 1,000 trucks, and 23 percent leasing on to carriers with 1,001 trucks or more. Despite contracting on with bigger carriers however, owner-operators tend to have a large amount of control over the operation of their truck as 89 percent are able to select their own routes when hauling a load and 94 percent

specified that they could refuse loads. It is important to note that 13 percent stated that they would face consequences or penalties for refusing loads, which is a four-percentage point decrease from 2020.

Graph 18: The most important issues to consider when leasing on



Graph 19: The most important issues that caused a leased-on owner-operator to leave their carrier



These questions are important in defining the difference between an independent contractor and an employee, which continues to be a hot topic, especially with the advent and confusion around California's Assembly Bill 5 which presumes all workers are employees unless an employer can rebut that assumption

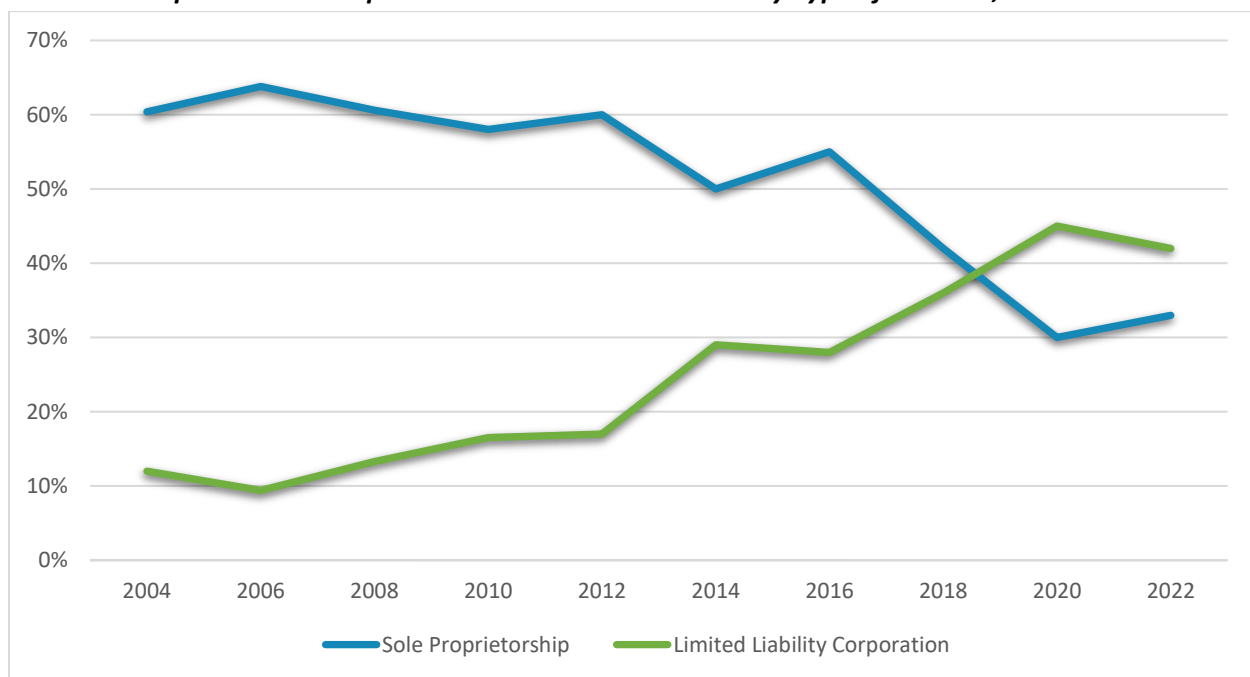
by passing what is commonly referred to as the ABC test. While AB 5 is currently in limbo until the courts ultimately decide its fate, more and more states are looking into the issue of misclassification, as well as federal lawmakers, as carriers sometimes classify their drivers as independent contractors when they are in actuality employees under Internal Revenue Service standards. OOFI expects this issue to grow even more pertinent in the coming years.

Finally, OOFI asked the leased-on owner-operators what they believed was their greatest challenge today. While the answers varied and covered a wide range of issues, several commented that their paramount issue was low freight rates, high expenses, a lack of truck parking, and excessive regulation. Together, these issues, as well as a host of others, are making it harder and harder for many to operate a successful trucking business today.

9. Owner-Operator Under Their Own Authority

Although nearly half of all motor carriers are single-truck operations, most lawmakers and regulators do not understand this segment of the trucking industry. OOFI has thus formulated a profile of those owner-operator members who operate under their own authority to better inform agencies and academia concerning this important community of truckers. To begin, it is interesting to note that while the standard business model for those under their own authority was a sole proprietorship historically, members now are more likely to establish their business as a limited liability corporation (LLC). This trend, which started in 2020 and has continued through 2022, may be due to the misperception that an LLC will protect an owner-operator from a lawsuit in the event of a crash. It might also be due to the Trump Administration's tax break on pass-through income.

Graph 20: Owner-Operator under their Own Authority Type of Business, 2004-2022



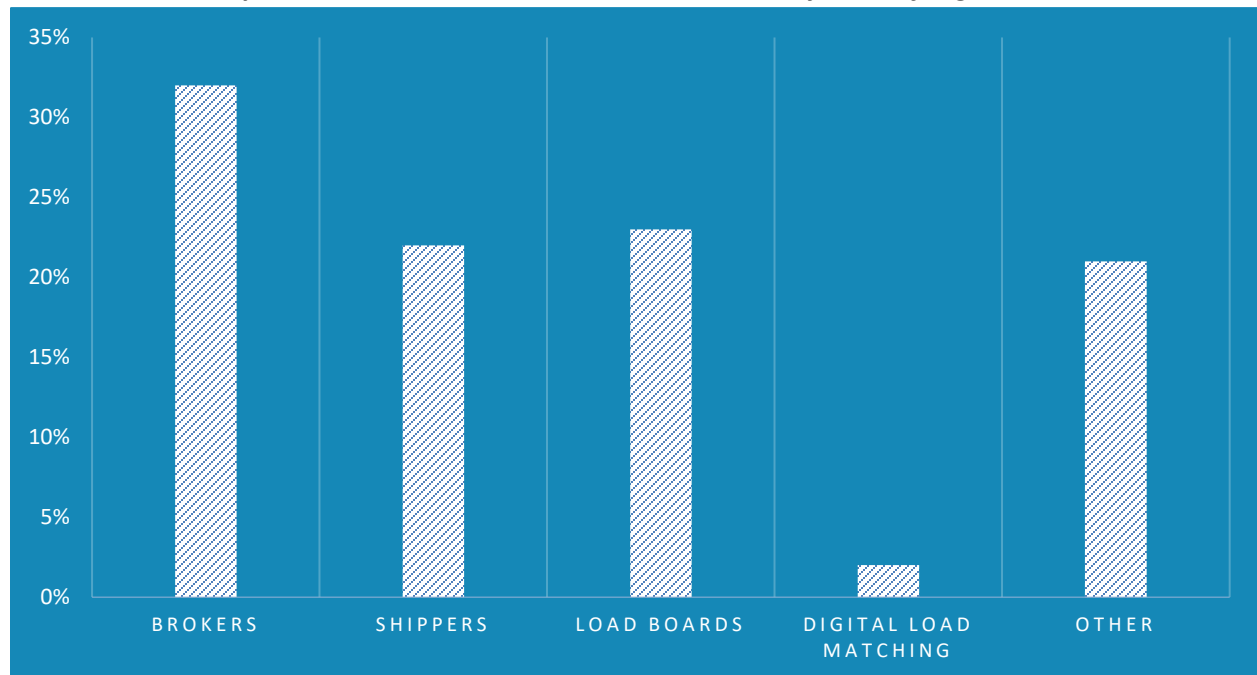
The typical owner-operator member continues to work with brokers (32%) and load boards (23%) in order to acquire loads even though OOFI has stressed through our business education series the importance to form direct relationships with small shippers. While brokers and load boards can be a necessary aspect of business, it is best for owner-operators to remove the middlemen and interact directly with the source of freight, meaning the shipper. This will have a positive impact on their bottom line as members who utilized shippers earned \$1.75 more per mile than those who used brokers and \$0.69 more per mile than those who used load boards.

Trucking can be a very difficult business, not only do owner-operators have to run their own company, including obtaining their own authority, permits, licenses, insurance, etc., but they also have to deal with unscrupulous brokers, shippers, factoring companies, etc. from time to time. Congress established the Safety Violation Hotline Service in 1998 as a way to assist carriers in filing complaints against a variety of

entities. The hotline was eventually transformed over the years to an online interface known as the National Consumer Complaint Databased (NCCDB).

However, OOIDA has listed many concerns with the NCCDB, stating, “This title does not signify a connection to the trucking industry in any way. OOIDA believes the (database) can help improve safety, but many drivers are unaware that the (database) is available for them to report violations of commercial regulations, nor are they aware that coercion complaints can be handled through the (database).¹⁵” OOFI asked respondents if they had ever filed a complaint on the NCCDB in order to help quantify the issue. The answer was a resounding no, as 69 percent had never filed a complaint and the remaining 31 percent had never even heard of it.

Graph 21: How do those under their Own Authority obtain freight, 2022



The NCCDB is not the only mechanism however at an owner-operator’s disposal in order to protect themselves from bad actors. For example, the Motor Carrier Act of 1935 was the first major legislative directive regarding financial responsibility levels for the trucking industry. Not only did the act establish minimum liability requirements for carriers, but it also required those individuals seeking authority to operate as a broker to furnish a \$5,000 bond or other security in order to protect motor carriers and shippers from dishonest and financially unstable brokers. Congress has increased the bonding amount over the years through various bills from the original \$5,000 in 1935 to \$75,000 today. Once again, OOFI wanted to quantify how frequently owner-operator members file against a broker’s bond, to which 13 percent indicated they had done so and 81 percent stated that they had not. The remaining 7 percent responded that they were unaware that they could file on a broker’s bond at all.

¹⁵ Mark Schremmer, “OOIDA maintains stance that complaint database needs new name,” Land Line Magazine (March 23, 2022), <https://landline.media/ooida-maintains-stance-that-complaint-database-needs-new-name/>

Another form of protection that FMCSA affords owner-operators is the DataQ Challenge System. The DataQ Challenge allows an owner-operator to remove an erroneous violation from the safety management system, or SMS, which can directly impact a carrier's ability to operate. However, the process itself can be arduous. In fact, only 16 percent of OOIDA members even know how to file a DataQ Challenge. Of those few who do know how, 45 percent have actually done so with 60 percent of the challenges concluding in their favor as the violation was either removed or downgraded.

Finally, OOFI asked those under their own authority what they believed was their greatest challenge today, just as it did with the leased-on owner-operators. While the two segments have similar difficulties, they experience them very differently. For example, the number one issue by far for those owner-operators under their own authority was compliance with an ever-increasing list of regulations. Though both groups stated regulations as a challenge, the number of regulations that those with their own authority have to comply with is much greater (paperwork, taxes, permits, licenses, insurance, etc.). Moreover, these regulations impact small carriers much differently than their larger competitors.

One member wrote, "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." Other challenges impacting owner-operators under their own authority today included rising fuel costs, declining rates, lack of truck parking, high maintenance costs, detention time, and poor road conditions.

Survey Results

There are 488 total respondents currently for any one question as of May 9, 2022. On March 25, 2022, the OOIDA Foundation emailed an online survey to 17,190 members who allow for email communication. The Survey had a started/viewed rate of 43.5 percent and a **95 percent** confidence level with a **4 percent** margin of error. The Survey therefore received enough response to be considered statically significant.

The number of respondents per question is in (). Percentage of each answer is given based on the number of respondents marking any one answer; all percentages have been rounded to the nearest whole number.

1. Which best describes your type of operation? (488)
 - a. Owner-operator (own authority) – 44%
 - b. **Owner-operator (leased to motor carrier) – 45%**
 - c. Fleet owner – 5%
 - d. Retired – 4%
 - e. Other – 2%

2. What is your ethnic background? (477)
 - a. **Caucasian – 81%**
 - b. African-American – 9%
 - c. Hispanic – 4%
 - d. Asian-American – 0%
 - e. Native American – 2%
 - f. Mid-Eastern – 0%
 - g. Eastern-European – 0%
 - h. Sikh – 0%
 - i. Other – 3%

3. What are you **primarily** depending on to secure your retirement income? (478)
 - a. None – 19%
 - b. IRA (Individual Retirement Account) – 19%
 - c. SEP (Simplified Employee Pension) – 6%
 - d. 401k plan – 4%
 - e. Mutual funds – 1%
 - f. Savings account – 9%
 - g. **Social Security – 24%**
 - h. Military – 3%
 - i. Real Estate – 4%
 - j. Other – 8%

4. Which **best** describes your business model? (475)
 - a. **Truck load (TL) – 71%**

- b. Less-than-truckload (LTL) – 6%
- c. Expeditor – 1%
- d. Power Only – 13%
- e. Other – 8%

5. What was your **gross income** last year? (355)

- a. Mean – \$258,119
- b. Median – \$190,000
- c. Mode – \$200,000

6. What was your **gross expense** last year? (330)

- a. Mean – \$187,195
- b. Median – \$118,000
- c. Mode – \$150,000

Net Income

- i. By mean – \$70,924
- ii. By median – \$72,000
- iii. By mode – \$50,000

7. What is the **primary** freight you haul? (465)

- a. **General freight – 40%**
- b. Refrigerated – 14%
- c. Agriculture non-refrigerated – 3%
- d. Building materials – 6%
- e. Aggregate (concrete, gravel, sand, etc.) – 2%
- f. Steel – 4%
- g. Livestock – 2%
- h. Automotive – 2%
- i. Hopper – 1%
- j. Intermodal containers – 3%
- k. Hazmat/liquid/chemicals/fuel – 8%
- l. Oversize/overweight – 5%
- m. Other – 11%

8. How old were you when you first got your CDL or chauffeur's license? (470)

- a. Mean – 25.6
- b. Median – 22
- c. Mode – 18

9. At what age did you become an owner-operator? (469)

- a. Mean – 38.3

- b. Median – 38
 - c. Mode – 35
10. How many years have you been an owner-operator? (463)
- a. Mean – 19.3
 - b. Median – 18
 - c. Mode – 6
11. Do you plan on retiring from trucking? (470)
- a. **Yes – 79%**
 - b. No – 21%
12. If yes, at what age do you plan to retire? (418)
- a. Mean – 69.1
 - b. Median – 68
 - c. Mode – 65
13. How many **loaded miles** did you drive last year? (315) (average per truck)
- a. Mean – 85,626
 - b. Median – 86,000
 - c. Mode – 100,000
14. How many **deadhead miles** did you run last year? (276) (average per truck)
- a. Mean – 17,600
 - b. Median – 12,000
 - c. Mode – 10,000
15. How many miles have you driven in your career? (335)
- a. Mean – 2,777,247
 - b. Median – 3,000,000
 - c. Mode – 3,000,000
16. How many DOT reportable accidents did you have **last year**? (387)
- a. Mean – 0.1
 - b. Median – 0.0
 - c. Mode – 0.0
17. How many DOT reportable accidents have you had in your career? (384)
- a. Mean – 0.8
 - b. Median – 0.0
 - c. Mode – 0.0

18. What is your **typical load's length** of haul? (387)
- a. 1 to 150 miles – 13%
 - b. 151 to 500 miles – 29%
 - c. 501 to 1,000 miles – 31%**
 - d. 1,001+ miles – 26%
19. How many nights were you away from home last year? (374)
- a. Less than 50 – 20%**
 - b. 50 to 100 – 10%
 - c. 101 to 150 – 11%
 - d. 151 to 200 – 18%
 - e. 201 to 250 – 16%
 - f. 251 to 300 – 14%
 - g. 300+ – 10%
20. Do you run: (384)
- a. Solo – 98%**
 - b. Team – 2%
21. What is the average weight of the loads you haul? (370) Lbs.
- a. Mean – 41,715
 - b. Median – 40,000
 - c. Mode – 40,000
22. Do you **primarily** haul in: (375)
- a. Northwest (AK, ID, MT, NE, ND, OR, SD, WA, WY) – 8%
 - b. Southwest (AZ, CA, CO, HI, NM, NV, UT) – 10%
 - c. Northcentral (IL, IN, IA, KY, MI, MN, OH, WI) – 27%**
 - d. Southcentral (AR, KS, LA, MS, MO, OK, TX) – 23%
 - e. Northeast (CT, DE, ME, MA, NH, NJ, NY, PA, RI, VT) – 10%
 - f. Southeast (AL, FL, GA, MD, NC, SC, TN, VA, WV) – 21%
23. How much did you pay last year on tolls? (332) \$
- a. Mean – \$2,394.75
 - b. Median – \$500
 - c. Mode – 500
24. What percentage of that toll cost were you reimbursed for? (326) %
- a. Mean – 17.3%
 - b. Median – 0.0%
 - c. Mode – 0.0

25. How are you **primarily** paid for your services? (387) (**Select only one**)

- a. **Per Trip, What is your average trip pay? (100) – 33%**
 - i. Mean – \$2,060
 - ii. Median – \$1,200
 - iii. Mode – \$1,000
- b. **Per Mile, What is your per mile pay? (58) – 23%**
 - i. Mean – \$2.71
 - ii. Median – \$2.53
 - iii. Mode – \$3.00
- c. **Hourly, What is your hourly rate of pay? – 1%**
- d. **Percentage, What is the percentage of the load? (120) – 33%**
 - i. Mean – 74%
 - ii. Median – 75%
 - iii. Mode – 65%
- e. By **volume or weight**, What is your average pay? 5%
- f. **Salary**, What is your annual salary? – 2%
- g. Other – 3%

26. How many trailers do you own? (348)

- a. Mean – 1.3
- b. Median – 1.0
- c. Mode – 0

27. Is your trailer(s): (271)

- a. New – 22%
- b. **Used – 64%**
- c. Mixture – 14%

28. What was the purchase price of your trailer? (253)

- a. Mean – \$37,996.44
- b. Median – \$32,000
- c. Mode – \$25,000

29. What type trailer do you **primarily** pull? (333)

- a. Flatbed (all configurations including lowboy and RGN) – 24%
- b. Reefer – 14%
- c. **Van – 32%**

- d. Grain – 3%
- e. Dump – 3%
- f. Tanker (including pneumatic trailer) – 9%
- g. Livestock – 1%
- h. Lowboy – 3%
- i. Auto hauler – 1%
- j. Containers – 3%
- k. Other – 8%

30. Do you have health insurance? (348)

- a. **Yes – 75%**
- b. No – 25%

How much is your monthly premium for your health insurance plan? (226)

- i. Mean – \$403.47
- ii. Median – \$250
- iii. Mode – \$0.00

31. Do you take any maintenance type prescriptions? (346)

- a. Yes – 50%
- b. **No – 50%**

32. If yes, do you take prescriptions for: (164 respondents checked 309 answers)

- a. High blood pressure – 61%
- b. Heart – 15%
- c. Diabetes – 25%
- d. Pain – 8%
- e. Cholesterol – 43%
- f. Thyroid – 12%
- g. Anxiety – 2%
- h. Depression – 5%
- i. Other – 16%

33. What is your height? (334)

- a. Mean – 70.1 inches
- b. Median – 71 inches
- c. Mode – 72 inches

34. What is your weight? (341)

- a. Mean – 224.2 lbs.
- b. Median – 215 lbs.

- c. Mode – 200 lbs.

BMI (334)

- a. Mean – 32.1
- b. Median – 30.7
- c. Mode – 29.5

35. Does your neck size exceed 17 inches? (342)

- a. Yes – 20%
- b. **No – 80%**

36. Has a motor carrier or medical examiner required you to be screened for obstructive sleep apnea (OSA)? (349)

- a. Yes – 9%
- b. **No – 91%**

37. If yes, what was the cost? (24) \$

- a. Mean – \$245.83
- b. Median – \$0.00
- c. Mode – \$0.00

38. Are you currently receiving treatment for OSA? (350)

- a. Yes – 7%
- b. **No – 93%**

39. If yes, what is the cost? (18)

- a. Mean – \$301.28
- b. Median – \$100.00
- c. Mode – \$0.00

40. Does your medical policy cover OSA screening and equipment? (342)

- a. Yes – 13%
- b. No – 30%
- c. **Not sure – 56%**

41. Do you have any of the following on your tractor/trailer: (325 respondents checked 612 answers)

- a. Trailer skirting – 23%
- b. Side underride guard – 5%
- c. Single wide tires – 9%
- d. Roof faring – 19%
- e. Boat tails – 0%

- f. SCR/EGR – 30%
- g. **DPF filters – 39%**
- h. Anti-idling equipment – 24%
- i. Other – 3%
- j. None – 37%

42. If yes, have you received a return on your investment? (197)

- a. Yes – 36%
- b. No – 64%

How many months did it take for you to receive a return on your investment? (54)

- a. Mean – 21.1 months
- b. Median – 13.5 months
- c. Mode – 12 months

43. How many trucks do you own? (327)

- a. Mean – 1.5
- b. Median – 1.0
- c. Mode – 1.0

44. Is your truck(s): (335)

- a. New – 21%
- b. **Used – 68%**
- c. Glider – 5%
- d. Mixture – 6%

45. What is the model year of your truck? (312)

- a. Mean – 2010
- b. Median – 2013
- c. Mode – 2015

46. The GVWR of my truck is: (335)

- a. Class 5 (Less than 19,500 lbs.) – 5%
- b. Class 6 (19,501 to 26,000 lbs.) – 2%
- c. Class 7 (26,001 to 33,000 lbs.) – 4%
- d. **Class 8 (33,001 lbs. and greater) – 88%**
- e. Other – 1%

47. How many miles have the vehicle been driven since it was manufactured? (314)

- a. Mean – 1,180,852
- b. Median – 785,000

c. Mode – 2,000,000

48. What was the purchase price of your truck? (305)

- a. Mean – \$81,440
- b. Median – \$65,000
- c. Mode – \$35,000

49. Is your truck paid off? (334)

- a. Yes – 63%**
- b. No – 37%

50. Have you ever lease-purchased a truck? (339)

- a. Yes – 29%
- b. No – 71%**

51. If yes, did you obtain the title? (94)

- a. Yes – 49%
- b. No – 51%**

52. Are you currently, in a lease-purchase agreement? (98)

- a. Yes – 22%
- b. No – 78%**

53. What is the horsepower of your engine? (323)

- a. 250 to 350 – 2%
- b. 351 to 400 – 4%
- c. 401 to 450 – 18%
- d. 451 to 500 – 33%
- e. 501+ - 43%**

54. What is the transmission in your truck? (322)

- a. 5 speed – 0%
- b. 6 speed – 1%
- c. 9 speed – 4%
- d. 10 speed – 16%
- a. Automatic or partial auto – 23%
- b. 13 speed – 30%**
- c. 15 speed – 2%
- d. 18 speed – 24%

55. What is your average fuel mileage? (331)

- a. Mean – 6.4
 - b. Median – 6.1
 - c. Mode – 6.0
56. Is your truck equipped with a specific device that restricts a vehicle's top speed regardless of design capabilities? (317) (i.e., a speed limiter)
- a. Yes – 23%
 - b. No – 77%**
57. If yes, what is the maximum speed setting of the speed limiter? (70)
- a. Mean – 75 mph
 - b. Median – 75 mph
 - c. Mode – 75 mph
58. Is your truck equipped with: (*select all that apply*) (308 respondents selected 549 answers)
- a. Automatic emergency braking – 10%
 - b. Air disc brakes – 20%
 - c. Adaptive cruise control – 20%
 - d. Active lane keep assist – 6%
 - e. Active lane centering assist – 3%
 - f. Adaptive steering control – 1%
 - g. Lane departure warning – 7%
 - h. Forward collision warning – 12%
 - i. Blind spot warning – 5%
 - j. Driver-facing camera – 5%
 - k. Road-facing camera – 44%**
 - l. Camera-based mirror system – 4%
 - m. None – 41%
 - n. Other – 1%
59. In your professional opinion, how helpful is this equipment? (289)
- a. Very helpful – 23%
 - b. Somewhat helpful – 24%
 - c. Neutral or unsure – 31%**
 - d. Somewhat unhelpful – 7%
 - e. Very unhelpful – 15%
60. Do you feel that these technologies: (297)
- a. Improve safety – 37%
 - b. Reduce safety – 20%
 - c. Have no effect on safety – 43%**

61. How many tires did you purchase last year? (300)
- a. Mean – 9.5
 - b. Median – 8.0
 - c. Mode – 10.0
62. What was your total tire repair and replacement cost last year? (242)
- a. Mean – \$6,016.62
 - b. Median – \$5,000
 - c. Mode – \$5,000
63. Approximately how much do you spend on tractor/trailer maintenance per year overall? (260)
- a. Mean – \$18,153.27
 - b. Median – \$14,229
 - c. Mode – \$10,000
64. Please allocate what percentage of your maintenance costs were related to one of these four items? (301) (The total of the four items combined cannot exceed 100%)
- a. emissions or environmental related equipment – 15%
 - b. highway damage or poor road conditions – 22%
 - c. **routine maintenance – 50%**
 - d. other – 11%
65. What was your ***primary*** job before becoming a professional truck driver? (310) (*choose one*)
- a. Construction worker – 11%
 - b. Farmer – 7%
 - c. Military – 14%
 - d. Mechanic – 9%
 - e. Factory worker – 6%
 - f. Sales – 5%
 - g. Student – 4%
 - h. Warehouse – 3%
 - i. Oil field – 1%
 - j. Always been a trucker – 17%
 - k. **Other – 23%**
66. Have you ever served in the military? (316)
- a. Yes – 32%
 - b. **No – 68%**
67. Complete this sentence: “I drive a truck because...” (317)

- a. All I ever wanted to do – 15%
- b. Love it/enjoy it – 18%
- c. Freedom/adventure/own boss – 30%**
- d. It pays the bills – 18%
- e. Multiple generation trucker – 8%
- f. Other (ten words or less) – 11%

Leased-On Owner-Operators

1. What is the greatest challenge for owner-operators today? (131)

The following is a list of common challenges for leased-on owner-operators according to survey results:

- Regulations/government
- Fuel prices
- Low wages
- High maintenance costs
- Parking
- Road conditions
- ELDs
- Congestion

2. When selecting a carrier to lease to, what are the most important issues you consider? (109) Please rank (1-8) the following in order of importance, 1 being the most important:

- a. **Amount of freight – 2.6 (2nd)**
- b. **Freight rates – 1.8 (1st)**
- c. Type of payment – 3.8
- d. Detention pay – 4.3
- e. Claims handling – 6.2
- f. **Company reputation – 3.2 (3rd)**
- g. Company safety record – 4.4
- h. Other – 6.5

3. How long have you been with your present carrier? (144)

- a. 0-1 year – 15%
- b. 2-3 years – 24%
- c. 4-5 years – 14%
- d. 6-7 years – 8%
- e. 8-10 years – 12%
- f. **11+ years – 26%**

4. How many carriers have you worked for in your career? (143)

- a. 1 – 8%
- b. 2 – 10%
- c. 3 – 21%
- d. 4 – 16%
- e. **5 or more – 45%**

5. If you have left a carrier, what were the most important issues that caused you to leave? (96) Please rank (1-8) the following in order of importance, 1 being the most important:

- a. **Lack of freight – 2.9 (3rd)**
- b. **Low pay – 2.1 (1st)**
- c. Excessive detention – 3.6
- d. Not enough home time – 3.8
- e. **Lack of respect – 2.7 (2nd)**
- f. Company reputation – 5.0
- g. Company safety record – 5.3
- h. Other – 4.8

6. The carrier I work for has: (138)

- a. 1 truck – 4%
- b. 2-5 trucks – 6%
- c. 6-20 trucks – 13%
- d. **21-100 trucks – 28%**
- e. 101-1,000 trucks – 26%
- f. 1,001+ trucks – 23%

7. Can you refuse loads? (144)

- a. **Yes – 94%**
- b. No – 6%

8. If yes, are there consequences or penalties? (134)

- a. Yes – 13%
- b. **No – 87%**

9. Are you able to choose your own routes? (147)

- a. **Yes – 89%**
- b. No – 11%

10. What type of business are you? (147)

- a. **Sole proprietorship – 52%**
- b. Partnership – 1%
- c. Limited Liability Corporation – 32%

- d. Corporation – 16%

Owner- Operators under their Own Authority

1. What type of business are you? (133)

- a. Sole proprietorship – 33%
- b. Partnership – 2%
- c. Limited Liability Corporation – 42%**
- d. Corporation – 23%

2. Please allocate what percentage of your business comes through the following entities: ()

- a. Brokers – 32%**
- b. Shippers – 22%
- c. Load Boards – 23%
- d. Digital Load Matching (i.e., Uber Freight, Convoy, etc.) – 2%
- e. Other – 21%

3. Have you ever filed a complaint on the National Consumer Complaint Database? (134)

- a. Yes – 0%
- b. No – 69%**
- c. I have never heard of it – 31%

4. Have you ever filed on a broker bond? (135)

- a. Yes – 13%
- b. No – 81%**
- c. Didn't know you could – 7%

5. Do you know how to complete a DataQ challenge? (135)

- a. Yes – 16%
- b. No – 84%**

6. If yes, have you ever completed a DataQ challenge? (22)

- a. Yes – 45%
- b. No – 55%**

7. If you have completed a DataQ challenge, did the challenge: (10)

- a. End in your favor and the violation was removed/downgraded – 60%**
- b. End in your favor but the violation was not removed/downgraded – 10%
- c. Did not end in your favor – 30%

8. Do you use a factoring service? (135)

- a. Yes – 28%

b. No – 72%

9. What is the greatest challenge for owner-operators today? (131)

The following is a list of common challenges for owner-operators under their own authority according to survey results:

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