



Outlook is positive for the trucking industry,
but pandemic takes toll on labour shortage
which continues to be a serious issue.

Participant Profile

Aggregate participant profile: 30 organizations participated in the research.

Over

**11.7
million**

loads carried in 2021



Over

67,000

trucks operated in
2021



Over

70,000

full- and part-time
employees in 2021



Over

39,000

full- and part-time
drivers in 2021



Participant Distribution

Loads



Average loads carried in 2021 509,498

Companies with less than 100,000 loads carried 12

Companies with 100,000 to 1,000,000 loads carried 9

Companies with more than 1,000,000 loads carried 3

Trucks



Average trucks operated in 2021 2,326

Companies with less than 100 trucks operated 8

Companies with 100 to 500 trucks operated 14

Companies with more than 500 trucks operated 8

Employees



Average employees in 2021 1,406

Companies with less than 500 employees 16

Companies with 500 to 1000 employees 5

Companies with more than 1000 employees 8

Drivers



Average drivers in 2021 702

Companies with less than 500 drivers 20

Companies with 500 to 1,000 drivers 3

Companies with more than 1,000 drivers 6

* Note: Five participating senior executives were unsure of the number of loads carried and one participant said the question was not applicable to them.

Top Issues of Concern

Question - What are your top issues of concern when it comes to the trucking industry today? Any others? [Open-ended]

An aging workforce, training barriers, and a lack of interest in the profession seen as major contributors to the current labour shortage in the trucking industry.

"It always has been a problem, and it is going to be an increasing problem. Demographics who are driving trucks are closer and closer to retirement."

"The availability of the current system to provide qualified drivers. There's a long back log of people trying to get their license. We need qualified young people in the industry."

#1

Labour Shortage

Leveling the playing field and ensuring everyone operates legitimately and legally.

"There are unscrupulous operators skirting taxes and getting an unfair advantage. That needs to be cleaned up. The government has to get ahead of that to fleece them out."

"Driver Inc is my number of concern. The Liberals announced recently they'll have task force to go after these companies. We've begged government to do something about it, but CRA hasn't shown up."

#2

Driver Inc.

Regulations don't meet the needs of the industry; creates barriers to meeting demand.

"Overregulation and too much red tape. I fear that the government takes a cookie-cutter approach to regulations, but the trucking industry is diversified and has many facets."

"The current federal government puts a lot of emphasis on regulatory issues in terms of labour restrictions, tax restrictions, etc. It is detrimental to the industry and making it more difficult for people."

#3

Regulatory Overload



The research gauged the opinions of trucking industry senior executives on business trends, labour shortage, capacity, unseated trucks, regulatory issues, and government regulations.

Nanos conducted live interviews of 30 senior executives of the trucking industry between July 28th and September 3rd, 2021.

The research was commissioned by the Canadian Trucking Alliance and was conducted by Nanos Research.

	Average	Total
Loads carried in 2021	509,498	11,718,450
Full-time employees in 2021	2,205	63,971
Part-time employees in 2021	353	7,771
Full-time drivers in 2021	1,330	38,574
Part-time drivers in 2021	29	791
Trucks operated in 2021	2,326	67,472

Key Findings

1

Business Outlook Positive

When asked to think about the overall business environment in the trucking industry, a majority of senior executives said the outlook is positive (18 out of 30) or somewhat positive (11 out of 30) and said these trends will continue at least for the short term as we come out of the COVID-19 pandemic.

2

Top Issues of Concern

A strong majority of senior executives (26 out of 30) ranked the labour shortage as their top issue of concern when it comes to the trucking industry today. Senior executives see an aging workforce, training barriers, and a lack of interest in the profession as major contributors to the current labour shortage in the trucking industry.

3

Addressing the Labour Shortage

Senior executives most often mention that changing the image of the industry and the profession and making it more attractive to the younger generation would help address their concerns about the labour shortage. Many senior executives mention that having the profession recognized as a skilled trade would drastically shift the way people view truck driving. Access to immigration is also mentioned as a solution.

4

CTA Priorities

Senior executives most often ranked labour as the most important priority they would like the CTA to focus on (18 out of 30). When asked what should be the top two priorities they would like the CTA to focus on in dealing with the Government of Canada, senior executives mentioned reducing regulatory barriers, combatting Driver Inc. and ensuring fair competition, addressing the labour shortage, and mandating ELDs.

A white semi-truck is driving on a multi-lane highway during the "blue hour" of twilight. The sky is a mix of deep blues and soft oranges from the setting or rising sun. The truck is in the left lane, moving towards the viewer. The overall mood is professional and forward-looking.

Overall Business Trends

“The outlook for the business environment in the trucking industry is positive. Industry leaders say the pandemic has had a positive impact on the image of the industry and has increased the demand for goods and transportation services.

”

Business environment in the trucking industry

Outlook of the business environment in the trucking industry is positive/somewhat positive

When asked to think about the overall business environment in the trucking industry, a strong majority senior executives said the outlook is positive or somewhat positive. Only one senior executive said the outlook was somewhat negative, but when asked the reason, they said the outlook is neutral more so than negative. Of note, there has been a shift in the number of senior executives who said the outlook was somewhat positive in 2019 compared to currently (20 out of 32 said somewhat positive in 2019 compared to 11 out of 30).

A majority of senior executives expect these trends to continue with most adding that their positive outlook for the business environment will continue at least for the short term as we come out of the COVID-19 pandemic.

	2021 (n=30)	2019 (n=32)
Continue	28	28
Not Continue	-	2
Unsure	2	2

Source: Nanos conducted in depth interviews with 30 senior executives members of the CTA from a list provided by the CTA. The interviews were conducted between July 28th and September 3rd, 2021.

Q

Thinking about the overall business environment in the trucking industry, do you think the outlook is positive, somewhat positive, somewhat negative, or negative?

Why do you have that opinion? [OPEN-ENDED]

Do you expect these trends to continue or not continue?

Why do you have that opinion? [OPEN-ENDED]

Business outlook	2021 (n=30)	2019 (n=32)
Positive	18	10
Somewhat positive	11	20
Somewhat negative	1	-
Negative	-	-
Unsure	-	-

“

I think the pandemic illustrated how important transportation is to the economy and the country. It put trucking into a positive public light. If you can move public will, you can move political will. This bodes well for the industry in general.

Volumes are good. We're coming out of the pandemic with pent up demand. In the next couple years, as long as we can get resources to meet demand and positions, things will be good.

There has been an increased demand for and awareness of the industry as a whole as a result of the pandemic.

”

Economic opportunities

Q

What are the opportunities you see in the economy based on what you are hearing from your customers?

Many senior executives see increased demand in the economy

When asked what the opportunities are that they see in the economy based on what they are hearing from their customers, many senior executives mentioned an increased demand for goods as a result of the pandemic in sectors such as online retail, lumber, steel, and food. Senior executives mentioned that this demand is largely due to people not being able to travel during the pandemic and spending their money on larger or more goods for themselves. Similarly, some senior executives also said that disruptions and changes occurred in the supply chain which has been difficult for some of their customers. A few participants also added that some of their customers have shifted to storage of goods which is beneficial to them as they are also a logistics company adding that coming out of COVID-19 pandemic, these customers will turn to inventorying and moving more goods to meet the increasing demand.

One participant said that there has been many opportunities for increase efficiency including in customer-client communications through online platforms like Zoom.

“

There is a shortage of supply. As people are coming out of the pandemic, there is more demand.

There's a capacity crunch with pent up demand. We have more customer demand than we can handle in most of our services.

People don't want to run out of product. There will be more of a push after the pandemic for people to inventory more goods than they used to.

More opportunities, where we are, for us to become more efficient. Some sectors are growing, like mining and agriculture and will need additional transportation services.

”

Economic challenges

Q

What are the challenges you see in the economy based on what you are hearing from your customers?

A lack of labour is the biggest challenge senior executives are hearing from their customers

When asked what the challenges are that they see in the economy based on what they are hearing from their customers, a majority of senior executives say a lack of manpower and qualified labour for both their customers and the trucking industry. Many senior executives also mention a lack of supply or disruptions in the supply chain largely due to shortages in components (i.e. chip shortage). Some senior executives also mention hearing that business has been decreasing for the customers with the increase in online purchasing creating challenges for many sectors. One participant mentioned inflation being a risk with rising interest rates and a potential market correction in the next two to five years, while another senior executives said the challenge in the economy is the unknown of what's to come.

“

For ours, not being able to get the products moved, which comes back to driver shortage in the industry as a whole.

Business to business has been decreasing with more shopping online.

A shortage of manpower is first. A shortage of goods is second, due to supply change issues.

Customers are seeing raw product and supply chain issues. Labour is also becoming more of a challenge.

Retail stores. Some have gone bankrupt. You need to make sure that your customers are paying on time. There is more shopping online, but maybe that will go down after the pandemic. Retail is going to be a challenge going forward.

”

Positive impact of COVID-19 on trucking industry

The pandemic had the biggest positive impact on the image of the trucking industry; respect and recognition of trucking as an essential service

When asked what the biggest positive impact, if any, of the pandemic on the trucking industry, senior executives most often said a recognition of trucking as an essential service and positive shift in the public image of the industry. The pandemic put a spotlight on the importance of drivers and the industry and senior executives hope this continues well after the pandemic.

Another positive impact some senior executives mentioned is an increased demand for goods as people are travelling less and buying more because of the pandemic. They mentioned that because of this increased demand for goods, they and often their customers are busier than ever.

Some senior executives also mentioned that the pandemic accelerated the adoption of certain technology (i.e. Zoom for virtual calls) and has had a positive impact on efficiency within their companies.

One senior executive mentioned that the pandemic also offered a 'cleaning up' of the poor or illegitimate operators which will create a better and stronger industry going forward.

Q

What would you say is the biggest positive impact, if any, of the pandemic on the trucking industry?

“

It put into light how essential transportation is. In order to keep the country moving, trucking really came through.

A recognition for what the industry does in terms of delivering to retail, restaurants, etc.

The fact that drivers finally got recognition for the work they did. They didn't stop during the pandemic. They finally got the lime light, which they deserved. It was long overdue and long deserved.

The trucking industry gained a lot of respect from people, we'll see how long lasting that is.

It has caused people to spend less on travel and a lot more on services and a lot of goods domestically so it has been a good thing for demand on goods globally.

In general, people are buying more and going on vacation less. They are spending a lot more money around the house and buying more luxury items. We're seeing a big growth of sales in terms of goods.

”

Negative impact of COVID-19 on trucking industry

The pandemic has had a negative impact on labour retention, supply chain, and driver amenities

When asked what the biggest negative impact, if any, of the pandemic on the trucking industry, senior executives most often mentioned social impacts including the impacts on drivers, mental health, and company morale. Some of the social impacts senior executives mentioned included a lack of access to driver amenities such as washrooms or restaurants, frontline exposure to the COVID-19 virus without access to vaccination, and isolation from families if they are cross-border drivers. One stakeholder mentioned that the pandemic also had a negative impact on company morale and comradery and prevented their team from interacting with each other which they did often before the pandemic.

Some senior executives also mentioned impacts on labour retention and recruitment, sourcing equipment and disruptions in the supply chain. Senior executives mentioned that due to the negative impacts of the pandemic on drivers, particularly older drivers, many retired early or left the profession. They also mentioned that the challenges drivers faced during the pandemic might affect future recruiting efforts.

Q

What would you say is the biggest negative impact, if any, of the pandemic on the trucking industry?

“

Trucking is a highly labour-intensive business. We put our people at risk going into areas without vaccines. They were not prioritized for vaccines early enough, so we put our most qualified members at risk.

We have an aging population especially in the role of truck drivers and the complexity and confusion of COVID-19 caused a lot of them to say forget this. It cause a lot of occupational challenges.

The fact that we lost a lot of senior/older drivers because the pandemic basically made them isolate themselves.

It has been detrimental for some segments of the industry. Certain goods were just not available. Lots of demand in some places, no demand in others.

Impact to drivers and as a results companies trying to provide service during that time, whether not being able to access services on the road like washrooms and restaurants or the impacts of the Canada-US border and putting themselves in harm's way by travelling in areas no one is going to. The impact of that has made drivers less interested in the job.

”

Expected changes in the trucking industry in the next 10 years

Electrification, automation, and a changing workforce are the major changes senior executives expect to see in the next 10 years

When asked what are the major changes they expect to occur in the trucking industry in the next 10 years, senior executives most often mention electrification of trucks, automation and autonomous vehicles, and a shift in labour. A majority of senior executives mentioned that there will be a shift in fuel sources for trucks in the next 10 years including electrification, hydrogen or other fuel sources. Many senior executives also mention increased automation, not only when it comes to autonomous or semi-autonomous vehicles, but automation of logistics such as invoicing or shipment tracking. Electrification and increased automation will affect not only the drivers, but regulations in the industry, increase costs for new equipment and an increased need for planning for trucking companies.

Some senior executives mentioned that a change of the face of the workforce in the trucking industry will also occur in the next 10 years largely due to the aging workforce. These senior executives also mentioned that this change will come with a restricting of how employers and the general public deal with employees of the trucking industry. senior executives also add that driving will need to be recognized as a skilled trade or that the profession needs to be made attractive to younger people in order to ensure there are enough drivers in the workforce going forward.

Q

What are the major changes you expect to occur in the trucking industry in the next 10 years? Any others? [OPEN-ENDED]

How do you expect [MENTION 1] to impact the way you do business? [OPEN-ENDED] How do you expect [MENTION 2] to impact the way you do business? [OPEN-ENDED]

“

I believe there will be a major restructuring of how a professional driver is dealt with both by the employer and the general public.

There will be more focus around emissions, which we're already heavily regulated in. Electric vehicles are going to be big.

Driver situation will only get worse until we can figure out how to recruit younger people.

The changing face of the workforce due to the current aging workforce.

I think consolidation will continue with larger players taking over smaller ones.

Autonomous vehicles may be a reality in controlled circumstances. Driver-assisted will play an aspect, but things will never be truly autonomous (think of it like plane autopilot).

”

Issues of concern in the trucking industry

Labour shortage is the top issue of concern by a strong majority of senior executives

A strong majority of senior executives mention the labour shortage as their top issue of concern when it comes to the trucking industry today. Senior executives see an aging workforce, training barriers, and a lack of interest in the profession as major contributors to the current labour shortage in the trucking industry. Senior executives mention this as their top concern for many reasons including the fact that this has been an ongoing problem and will only increase with the aging demographics of the current workforce. Another reason is the need for even more labour to meet increasing demand for transportation of goods, new graduates also don't have the experience and training to enter the workforce with legitimate companies.

Many senior executives also mention regulating Driver Inc. carriers in order to level the playing field and ensure everyone operates legitimately and legally.

Several senior executives mentioned over-regulation or 'cookie cutter' regulations as a top issue of concern when it comes to the trucking industry today, stating regulations don't meet the needs of the industry and create barriers to meeting demand.

One senior executive mentioned having predatory pricing and competitive rates as a concern, while another mentioned safety is always a concern as it continues to have a significant impact on the industry.

Q

What are your top issues of concern when it comes to the trucking industry today? Any others? [OPEN-ENDED]

Why are you concerned about [MENTION 1]? [OPEN-ENDED]

Why are you concerned about [MENTION 2]? [OPEN-ENDED]

“

Getting enough people. Not a lot of people that want to be a driver these days. It is also tough to find technicians.

Low cost carriers using Driver Inc trying to skirt taxation and not playing fair. It doesn't allow us to move the meter if we want to push the rates higher. There are many bad actors out there not paying taxes. That all comes at a cost to ensure you are legitimate and legal.

Driver training. Mandatory training doesn't go far enough.

Labour is by far the top issue.

Level playing field and Driver Inc model, unscrupulous operators skirting taxes and getting an unfair advantage. That needs to be cleaned up. The government has to get ahead of that to fleece or audit that.

”

Ranking of issues in the trucking industry

“

Labour shortage is ranked as the most concerning issue in the trucking by a majority of senior executives. When asked the reason the labour shortage is most concerning to them, senior executives most often said that the labour shortage has been an ongoing problem that has only gotten worse with an aging workforce, increased demand, and a lack of interest from the younger generation. Many senior executives also mentioned that the labour shortage, unseated trucks, and capacity are closely linked and often a product of the labour shortage.

”

Q

Please rank the following potential issues in the trucking industry on a scale where 1 is the most concerning, 2 is the second most concerning and so on. [RANDOMIZE]

You said [RANK 1] is most concerning to you. Why are you concerned about [RANK 1]? [OPEN-ENDED]

	2021			2019		
	Rank 1 (n=30)	Rank 2 (n=30)	Rank 3 (n=30)	Rank 1 (n=32)	Rank 2 (n=32)	Rank 3 (n=32)
Labour shortage	26 of 30	2 of 30	2 of 30	26 of 32	5 of 32	1 of 32
Capacity	-	8 of 30	8 of 30	-	4 of 32	7 of 32
Unseated trucks	1 of 30	8 of 30	9 of 30	3 of 32	11 of 32	3 of 32
Planning	-	1 of 30	-	1 of 32	1 of 32	4 of 32
Business environment	-	2 of 30	2 of 30	-	7 of 32	7 of 32
Government regulations	2 of 30	6 of 30	8 of 30	2 of 32	3 of 32	9 of 32
Other	-	-	-	-	-	-

TOP RESPONSES

Source: Nanos conducted in depth interviews with 30 senior executives members of the CTA from a list provided by the CTA. The interviews were conducted between July 28th and September 3rd, 2021.

A white semi-truck is driving on a multi-lane highway during the "blue hour" of dusk. The sky is a mix of deep blues and oranges from the setting sun. The truck is in the left lane, moving towards the viewer. The background shows a distant horizon with some trees and structures.

Driver and Labour Shortages

“Labour shortage is a major concern for senior executives with the shortages having increased during the pandemic and expected to increase in the next two years.”

Labour shortages in the trucking industry

Recognizing truck driving as a skilled trade mentioned as top solution to addressing the labour shortage

Many things come to the mind of senior executives when asked about labour shortages in relation to the trucking industry. Senior executives mentioned a lack of drivers, as well as technicians, mechanics and other support staff. They also mentioned the importance of qualifications and qualified drivers. Another thing that came to mind for many senior executives was the attractiveness of the profession to the younger generation.

Senior executives most often mention that changing the image of the industry and the truck driving profession and making it more attractive to the younger generation would help address their concerns about the labour shortage. Many senior executives specifically mention that having the profession recognized as a skilled trade would drastically shift the way people view truck driving. Two senior executives used the comparison between hairdressers and truck drivers, with the latter having very strict training, regulation, and safety mandates, yet hairdressing is considered a trade and truck driving is not. Having truck driving recognized as a trade would also help get funding for training for those wanting to join the profession as training can often be quite costly which might be a deterrent. Another deterrent to recruiting is the age at which drivers can get insured. A few senior executives mentioned that drivers cannot be insured until they are 25 or older and need a minimum of 3 years of experience and that this unnecessary constraint will push a lot of the younger drivers to work for Driver Inc. companies or leave the profession altogether. Some senior executives also mentioned that access to immigration, especially for those who are looking to enter the industry workforce, would also help address the labour shortage.

Source: Nanos conducted in depth interviews with 30 senior executives members of the CTA from a list provided by the CTA. The interviews were conducted between July 28th and September 3rd, 2021.

Q

When you hear about labour shortages in relation to the trucking industry, what comes to mind? [OPEN-ENDED]
What could be done to address your concerns about the labour shortage in the trucking industry? Anything else? [OPEN-ENDED]

“

The industry has been pushing an NOC classification change to skilled labour, we have an apprenticeship and trade certification for someone in the hairdressing industry yet truck drivers are not considered a trade. How does that make sense?

There are not many people who want to be a truck driver. Today it isn't seen as a trade, but it really is. It needs to be viewed as a trade. There's a stigma.

The biggest challenge we have is that space around the professionalism of the task and what we're asking our folks to do and be.

It seems like people in the industry are all fighting for the same labour pool. One of the challenges is the image of the industry and the type of lifestyle it brings. One of the positives of the pandemic is that it brought a positive spin to it and the industry has been working on presenting it as an attractive lifestyle to people.”

Changes in labour shortages during COVID-19

Labour shortages have increased and are expected to continue to increase in the next two years

A majority of senior executives say that labour shortages have increased since before the pandemic and think that they will continue to increase in the next two years. Senior executives said the reason for this increase was due to older drivers retiring, barriers to recruiting or a general lack of interest, and those who receive CERB are less likely to want to come back to work.

Some senior executives said that labour shortages have stayed the same since before the pandemic saying that some positions were hard to fill before the pandemic and they are equally hard to fill now.

“
With CERB and other government supports, a lot of people have continued to stay at home.
Older drivers are retiring. It's really difficult to train new drivers during a pandemic when they have to get into a truck with someone.
I don't see a lot of people entering the industry and I don't see a lot of qualified applicants when we have a position available.
We're struggling as much as ever now. There is no one interested in trying it as a new career and no young people have applied to our new training program we set up.”

Q

Would you say that labour shortages have increased, decreased or stayed the same since before the pandemic?

Why do you have that opinion? [OPEN-ENDED]

Where do you see the greatest shortages if any? [OPEN-ENDED]

In the next two years do you think that labour shortages will increase, decrease or stay the same as today?

Labour shortages now vs before the pandemic	Frequency (n=30)
Increased	26
Decreased	-
Stayed the same	4

Labour shortages in next two years	Frequency (n=30)
Increase	19
Decrease	1
Stay the same	6
Unsure	4

Source: Nanos conducted in depth interviews with 30 senior executives members of the CTA from a list provided by the CTA. The interviews were conducted between July 28th and September 3rd, 2021.

A white semi-truck is driving on a multi-lane highway during the "blue hour" of dusk. The sky is a mix of deep blues and soft oranges from the setting sun. The truck is in the left lane, moving towards the viewer. The word "Capacity" is overlaid in large white text on the left side of the truck.

Capacity

“ A lack of capacity is seen as directly linked to the labour shortages according to a majority of senior executives. ”

Lack of capacity in the trucking industry

Most say a lack of capacity is synonymous with labour shortages

A majority of senior executives relate a possible lack of capacity to the labour shortages in the trucking industry, with most saying that it is a lack of human capacity and not equipment that is the problem. Many senior executives also added that unseated trucks are also a lack of human capacity.

Several senior executives said that there is a lack of equipment availability due to shortages in the supply chain, such as the chip shortage, which is causing backlogs or delays in equipment orders. A few senior executives have added that they don't think they could even order equipment right now and if they did, it would likely arrive in the distant future.

Those who said a lack of capacity was synonymous with labour shortages mentioned the same could be done to address their concerns about the lack of capacity as could be done for labour shortages. This included allowing immigration to fill positions, decreasing unnecessary government regulations, ending COVID social assistance programs, and making the profession more attractive among others.

Those who mentioned a lack of equipment when it comes to capacity said there isn't much that can be done to address their concerns as it is a matter of when components will become available. A few added that efficiency will be key when dealing with a lack of capacity in terms of equipment.

Q

When you hear about a lack of capacity in relation to the trucking industry, what comes to mind? [OPEN-ENDED]

What could be done to address your concerns about the lack of capacity in the trucking industry? Anything else?[OPEN-ENDED]

“

Unseated trucks. More people have the capability to get more equipment, but not the ability to get more people behind the wheel.

I don't think there is a significant lack of capacity. Goods aren't sitting in the warehouse. There is enough capacity to move products.

Not a lack of trucks or capital, it's a lack of human capital.

It is tied to equipment availability. There is a significant backlog and equipment shortage in the industry. The number of trucks that were sold internationally for pennies, those were for our industry, and now there is a shortage and we cannot get that back.

Lack of capacity is a loaded question. if we had drivers to put behind the wheel then we probably would have a bit of a capacity issue. The other problem is we can't buy trucks anymore and there is a back log of orders.

”

A white semi-truck is driving on a multi-lane highway during the "blue hour" of dusk. The sky is a mix of deep blues and soft oranges from the setting sun. The truck is in the left lane, moving towards the viewer. The road has white lane markings and a metal guardrail on the right side. The overall mood is quiet and industrial.

Unseated trucks

“Unseated trucks are a result of the lack of available labour and a majority of senior executives expect they will have unseated trucks a year from now.”

Unseated trucks in the trucking industry

Unseated trucks are largely due to the driver shortage

Senior executives unanimously say the driver shortage when asked what comes to mind when they hear about unseated trucks in relation to the trucking industry. Senior executives not only mention the labour shortage, but a lack of qualified drivers with some senior executives adding the inability to train new drivers, the challenges of an aging workforce, and the poor ability of the trucking industry to compete with other industries like construction for skilled labourers.

One senior executive mentioned the financial implications of unseated trucks saying that they mean unearned or uncompleted revenue for the company which is a burden on the company since unseated trucks cost money for support, maintenance, or payments. Another participant mentioned the incorporated driver model where companies are converting too many drivers to personal business services.

To address their concerns about unseated trucks in relation to the trucking industry, a majority of senior executives point to the solutions mentioned to address their concerns about the labour shortage.

Q

When you hear about unseated trucks in relation to the trucking industry, what comes to mind? [OPEN-ENDED]
What could be done to address your concerns about unseated trucks in the trucking industry? Anything else?[OPEN-ENDED]

“

Lack of qualified drivers, inability to train new drivers, poor ability of trucking to compete with construction. We lose a lot of skilled people to other industries.

Labour shortage in relation to drivers.

Unseated trucks is driver shortage.

Linked to driver shortage. If you don't have the driver for a truck, it's sitting there unused.

Similar to the labour shortage. Aging work force, less people coming in than retiring. There is a lot more demand for transportation and a lot fewer people there to drive the trucks.

Not surprised with the current labour shortage.

”

Number of unseated trucks

Q

How many unseated trucks, if any, do you have?

“

Two in five senior executives report that the number of unseated trucks they have is **less than five per cent** of their fleet, followed by about one in five who report that 10% of their fleet is unseated trucks.

”

	Frequency (n=27)
Less than five per cent	11 out of 27
10 per cent	5 out of 27
15 per cent	3 out of 27
Five per cent	2 out of 27
None	2 out of 27
Between five and 10 per cent	2 out of 27
Over 15 per cent	1 out of 27
Other	1 out of 27

Source: Nanos conducted in depth interviews with 30 senior executives members of the CTA from a list provided by the CTA. The interviews were conducted between July 28th and September 3rd, 2021.

Unseated trucks in the future

Labour shortage, company/industry growth, and regular seasonal labour availability are reasons why senior executives expect unseated trucks a year from now

A strong majority of senior executives expect (23 out of 26) or somewhat expect (2 out of 26) to have unseated trucks a year from now. One senior executive does not expect to have unseated trucks a year from now reasoning that they are hopeful and are managing buying new trucks and getting rid of older ones to help achieve this.

For those who do expect to have unseated trucks a year from now, they most often say the reason for this is the continued growth of their company or the industry coupled with a labour shortage they don't foresee ending soon. Many senior executives also mention that alongside the lack of drivers in general, they are also challenged finding replacements for summer vacations or their retiring workforce.

Q

Do expect, somewhat expect, somewhat not expect or not expect to have unseated trucks a year from now? [OPEN-ENDED]
Why do you have that opinion? [OPEN-ENDED]

Having unseated trucks a year from now	Frequency (n=26)
Expect	23
Somewhat expect	2
Somewhat not expect	-
Not expect	1

“

We've just always had unseated trucks; it is always a catch-up game.

We're on the front-end of a labour shortage. I don't see any viable solutions outside of international recruitment, which also takes time.

We can't fill the seats; we're advertising continuously, we're recruiting across Canada. We're all in the same boat, there's nobody out there. The reality is there's just no people out there. We're looking for about 50 drivers right now.

Our mandate is to grow and to grow within an environment of labour shortages is going to present some challenges. We'll expect to have unseated trucks at times as we expand.

”

A white semi-truck is driving on a multi-lane highway during the "blue hour" of dusk. The sky is a mix of deep blues and oranges from the setting sun. The truck is in the left lane, moving towards the viewer. The background shows a distant horizon with some trees and structures.

Regulatory issues

“

Minimizing unnecessary regulation while combatting Driver Inc. are top priorities senior executives would like the CTA to focus on, followed by addressing the labour shortage and mandating ELDs.

”

Priorities for the CTA when dealing with the Government of Canada

Minimizing unnecessary regulation while combatting Driver Inc. are top priorities senior executives would like the CTA to focus on

When asked what should be the top two priorities they would like the CTA to focus on in dealing with the Government of Canada, senior executives mentioned reducing regulatory barriers and harmonizing regulations across the provinces, combatting Driver Inc. and ensuring fair competition, addressing the labour shortage, and mandating electronic logging devices.

Two senior executives mentioned that in dealing with the Government of Canada, the CTA should focus on the opportunity of reinvesting the carbon tax as a funding strategy to help transition the industry to more environmentally friendly standards and technology.

Q

In dealing with the Government of Canada what should be the top two priorities you would like the CTA to focus on? [OPEN-ENDED]

“

The current federal government puts a lot of emphasis on regulatory issues in terms of labour restrictions, tax restrictions, etc. It is detrimental to the industry and making it more difficult for people.

The CTA needs to ensure that the trucking industry doesn't get swept up in changes made in legislation targeting other economic sectors.

They need to focus on Driver Inc and finding ways to police crooked carriers. If they go unchecked, they just get bigger, because they have the advantage. It's a cancer that will spread like crazy if unchecked.

We need to find a way to have the Federal Government understand that the [labour] shortage is critical. The industry is basically going to be on life support to try and keep the economy moving.

They should focus on getting rid of Drivers Inc model.

”

Ranking of potential CTA priorities

Q

Please rank the following potential priorities that you would like the CTA to focus on where 1 is the most important priority, 2 the second most important and so on. [RANDOMIZE]

“

Senior executives most often ranked **labour** as the most important priority they would like the CTA to focus on, followed by **business needs and compliance**.

”

	First ranked priority (n=30)	Second ranked priority (n=30)	Third ranked priority (n=30)
Labour	18 of 30	9 of 30	1 of 30
Business needs and compliance	8 of 30	7 of 30	4 of 30
Road safety	1 of 30	6 of 30	7 of 30
Preparing for election and new government	2 of 30	4 of 30	1 of 30
Border Issues	1 of 30	2 of 30	7 of 30
Environment	-	2 of 30	9 of 30

Source: Nanos conducted in depth interviews with 30 senior executives members of the CTA from a list provided by the CTA. The interviews were conducted between July 28th and September 3rd, 2021.

A white semi-truck is driving on a multi-lane highway during the "blue hour" of twilight. The sky is a mix of deep blues and soft oranges from the setting or rising sun. The truck is in the left lane, moving towards the viewer. The background shows a distant horizon with some trees and structures.

Government regulations

“ A majority of senior executives said that the CTA should work with the government to level the playing field and continue bringing to light the bad behaviour in the industry. ”

New government regulations in the trucking industry

A lack of understanding of the trucking industry most often comes to mind when senior executives hear about new government regulations

Asked what comes to mind when they hear about new government regulations in relation to the trucking industry, senior executives most often mention that the regulations do not meet the needs of the industry and can often create barriers or additional costs.

Many senior executives also mentioned ELD mandates come to mind when they hear about new government regulations in relation to the trucking industry and are in support of the legislation, but believe they could be more timely in their enforcement of the mandate. Senior executives also mention that government regulations should be focusing on regulating bad carriers and addressing Driver Inc.

Q

When you hear about new government regulations in relation to the trucking industry, what comes to mind? [OPEN-ENDED]
What could be done to address your concerns about new government regulations in the trucking industry? Anything else? [OPEN-ENDED]
What should government regulations be focusing on? [OPEN-ENDED]

“

I don't have a problem with regulations, other than harmonization from coast to coast which we certainly don't have.

I'm not happy about [the new government regulations]. Invariably, I think it's another half-cocked effort trying to do the right thing in all the wrong ways.

The regulations coming out have no common sense. They need to work with the CTA to vet stuff before they put it out there.

Nothing good comes to mind. The greatest fear is that the government doesn't understand how the industry works. Sometimes the government offers a solution to an issue we don't have, which makes life tough.

What comes to my mind is that there is usually a cost associated to regulations.

”

Advice for the CTA

Top piece of advice for the CTA: Focus on leveling the playing field and bringing to light bad carriers

When asked what piece of advice they had for the CTA to help them manage current and future challenges related to trends in the trucking industry, a majority of senior executives said that the CTA should work with the government to level the playing field and continue bringing to light the bad behaviour in the industry.

Two senior executives said that the CTA should continue to focus on awareness and the image of the industry making it more attractive. Two senior executives mentioned that the CTA should continue to actively solicit input from committees and the board.

A couple senior executives also said that unifying a national voice and ensuring rules and regulations are harmonized across the provinces would be valuable for the CTA to focus on.

Q

If you had one piece of advice for the CTA to help you manage current and future challenges related to trends in the trucking industry, what would it be? [OPEN-ENDED]

Are there any other issues related to the trucking industry that the CTA should consider? [OPEN-ENDED]

“

Say to the CTA to keep up the good work. They do a good job of trying to keep a unified national voice amongst different provincial motives.

They should be working with government to level the playing field not just in regard to Driver Inc, but those ripping out all emissions controls, falsifying logbooks, and breaking all kinds of rules.

They need to focus on addressing the Driver Inc issue currently.

They should keep bringing to light the bad behaviour in the industry.

They should be creating an overall more attractive image of industry for people not to look at it as last resort.

”

The next 'big thing' in trucking

Q

What do they see as the next 'big thing' in trucking? This is long term, big picture, next 10-20 years? [OPEN-ENDED]

Autonomous and green technologies seen as next 'big thing' in trucking

When asked what they see as the next 'big thing' in trucking, senior executives mentioned autonomous trucks and automation, electrification and a shift away from diesel, and consolidation in the industry whether it be through mergers and acquisitions or 'Uber-ization' of the industry. When mentioning autonomous trucks or automation, some senior executives mentioned automation in operating systems, maintenance, and upkeep, also noting that autonomous trucks will not be fully autonomous and will always require some sort of pilot or operator. One participant shared their concern for these changes adding they might not be realistic or attainable for driving over long distances.

Some senior executives also mentioned that the labour shortage will continue to be an issue long-term.

“

I see electric trucks, semi-autonomous/autonomous trucks, more mergers and acquisitions as the next big things.

Other than driver shortage, there could be exciting things around truck technology, especially on the fuel side and with aerodynamics and energy efficiency.

I think the next big things are mostly electric vehicles, but also more automation. I'm not sure the trucks will ever be fully autonomous as there will always be some sort of pilot or operator. Also more automation in maintenance and upkeep.

Aside from HR issues, it will be how we transition away from diesel.

”

Comments for the CTA about the trucking industry

“

They do a very good job, very appreciative of them.

Great industry. It paid for my education. It's a great place.

I think they're doing a great job, I'm proud to be a part of it.

They did an awesome job through COVID. They worked hard and kept up with changes in real time. They really stood out as an industry leader.

The efforts of the industry through COVID is a great example of the strength of our industry. A lot of good things came together through COVID within the industry and the CTA.

They do a really good job and I appreciate them. Keep it up.

It's a great industry and we are the backbone of the economy for the country. There's a saying: If you got it, the truck brought it. We went through regulation, we went through deregulation, from unionized, to non-unionized, strict training to free-wheeling owner operators. There is always a lot of change. We need to keep moving and find a way to bring people into the industry and make it attractive again. I am proud to be a part of an industry with such heart.

We try our best to do all our different touch points, CTA tries to be involved in all different parties, but the government is so slow.

”

Q

Do you have any other comments you would like to share about the trucking industry with the CTA? [OPEN-ENDED]

“

At the end of the day, this driver shortage is the most important, nothing else matters. We need to be all hands on deck to figure this out. I encourage and we need a government voice to go out there and explain how difficult and how bad a shape the industry is in and what that means for the economy. It's critical. From a pure selfish point of view, when demand outdoes supply, prices start going up and companies make a better return so I have no problem with the shortage from that perspective. But taking a look at the industry overall it will be a huge issue.

They do a good job of representing the industry and were glad to have them as an organization.

I want to reinforce that I think this thing about the training is most important to address labour shortages (the Quebec model).

They just have to watch their focus. We've been a CTA member for a long time and seen the good and the bad. I am concerned going forward about the CTA. I've been involved for almost 40 years. I have the same concerns about the provincial associations.

Keep doing what they're doing; I think they're doing an excellent job.

I appreciate them and the work they do.

”

Source: Nanos conducted in depth interviews with 30 senior executives members of the CTA from a list provided by the CTA. The interviews were conducted between July 28th and September 3rd, 2021.

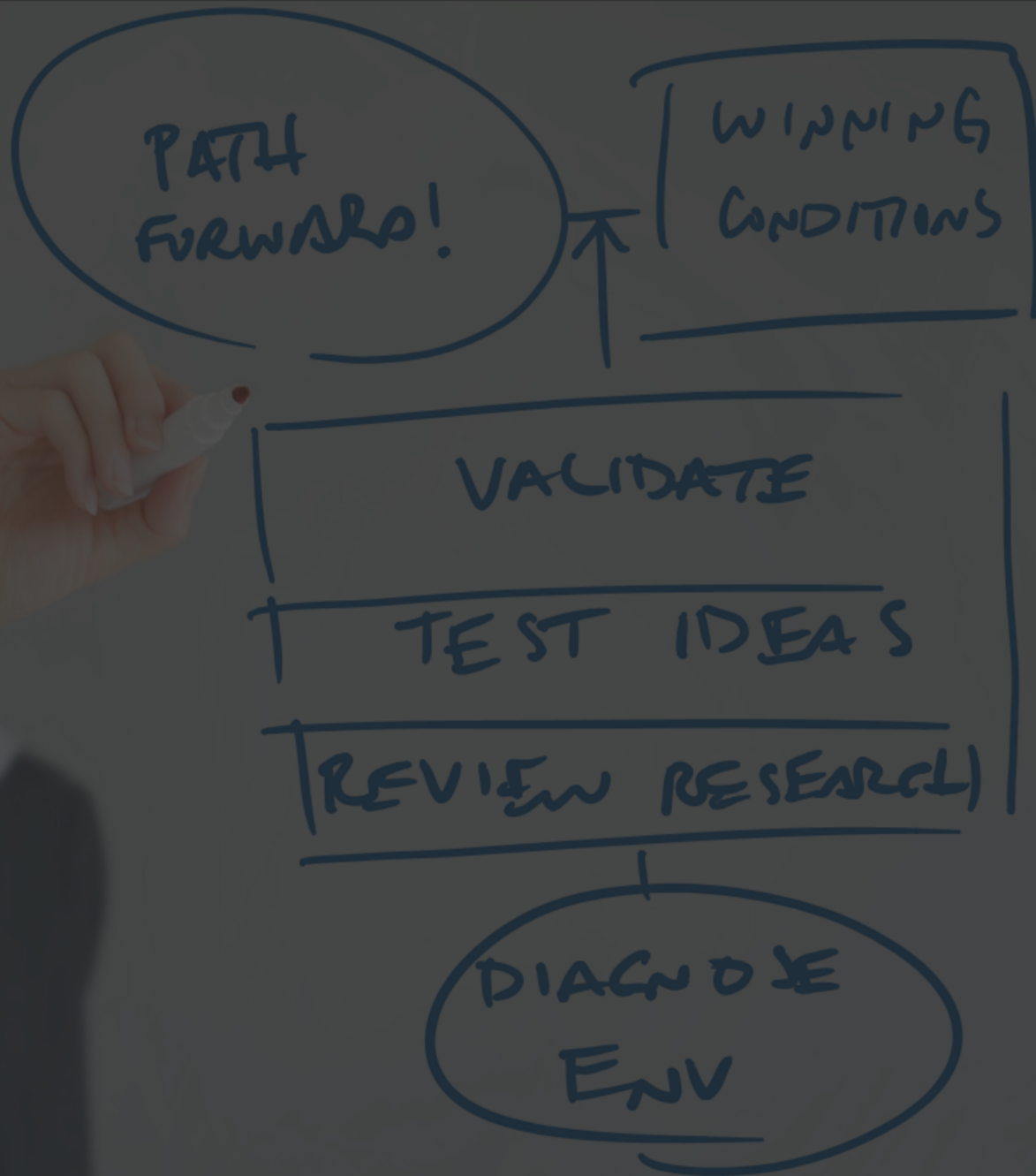


On behalf of the Canadian Trucking Alliance (CTA), Nanos conducted live interviews with 30 senior executives of CTA member companies between July 28th and September 3rd, 2021. senior executives were recruited using a list provided the CTA. Interviews were conducted in English.

Each interview was approximately 30 minutes in length. A total of 30 individuals participated in the research, with an estimated response rate of 37%.

Readers should note that member consultation research is qualitative in nature and should not be projected to the target populations.

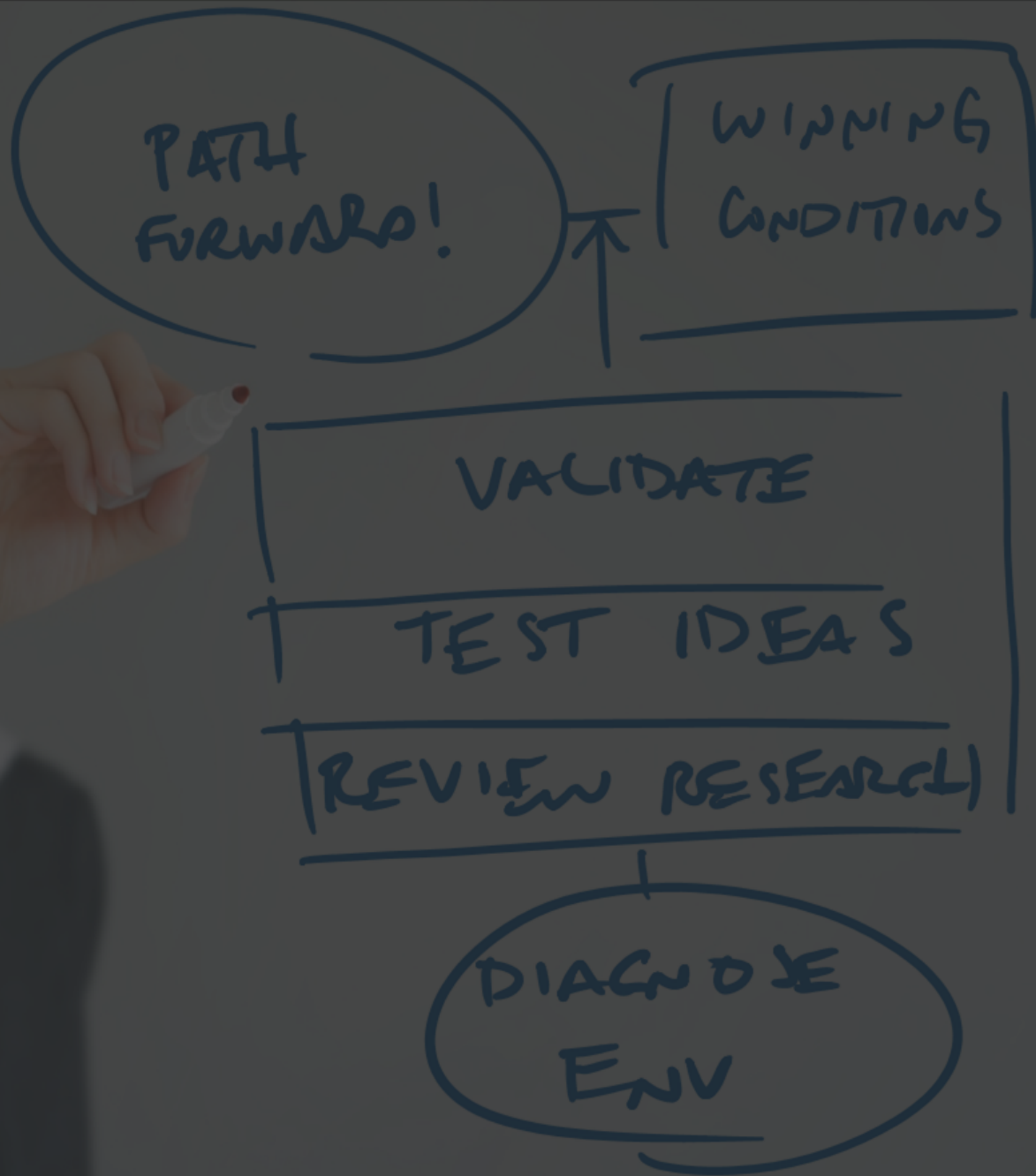
Response Rate		
A	Number of Contacts Provided by Client	82
B	Invalid Contacts	-
C	Potential Contacts ($C=A-B$)	82
D	Number of Completed Interviews	30
E	Contacted with No Response/Unavailable	52
F	Refusal	-
G	Response Rate ($G=C/D$)	37%



METHODOLOGY – Previous Wave

On behalf of the Canadian Trucking Alliance, Nanos conducted elite consultations with 30 senior executives of Canadian Trucking Alliance companies between November 19th, 2018 and March 13th, 2019. senior executives were recruited using a list provided by the Canadian Trucking Alliance. Interviews were conducted in English. The methodology is not a projective technique but provides an understanding of the nuance of opinion. Each interview was a maximum of 30 minutes in length.

A total of 32 individuals participated in the research, with an estimated response rate of 30%.





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NOTES FROM THE INTERVIEWS

