



Labour constraints continue to be the top issue of concern among trucking executives and along with equipment shortages contribute to limited capacity.



The research gauged the opinions among Canadian trucking industry senior executives on business trends, inflation and costs of good, the supply chain, the availability of trucks, labour shortage, regulatory issues, and government regulations.

Nanos conducted live interviews of 36 senior executives of the trucking industry between April 13th and May 6th, 2022.

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

	Average	Total
Loads carried in 2021	72,166	2,237,150
Full-time employees in 2021	1006	34,193
Part-time employees in 2021	179	5,730
Full-time drivers in 2021	424	14,407
Part-time drivers in 2021	29	999
Trucks operated in 2021	1163	39,540

Participant profile

Aggregate participant profile: 36 organizations participated in the research.

Over

2.2

million

loads carried in 2021



Over

39,000

trucks operated in
2021



Over

40,000

full- and part-time
employees in 2021



Over

15,000

full- and part-time
drivers in 2021



Participant distribution

Loads



Average loads carried in 2021 72,166

Companies with less than 100,000 loads carried 19

Companies with 100-500,000 loads carried 5

Companies with over 500,000 loads carried 1

Trucks



Average trucks operated in 2021 1163

Companies with less than 100 trucks operated 14

Companies with 100 to 500 trucks operated 13

Companies with more than 500 trucks operated 7

Employees*



Average employees in 2021 1006

Companies with less than 500 employees 25

Companies with 500 to 1000 employees 3

Companies with more than 1000 employees 6

Drivers*



Average drivers in 2021 424

Companies with less than 500 drivers 28

Companies with 500 to 1,000 drivers 2

Companies with more than 1,000 drivers 4

*Data shows full time employees and drivers only.

Top Issues of Concern

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

A shortage of drivers, training barriers, issues with access to immigration programs and a lack of interest in the profession seen as major contributors to the current labour shortage in the trucking industry.

"Where are we going to find them and how are we going to keep them that is a number one concern. This has been an ongoing issue for 50 years."

"It's not a place of first choice for people that are young coming into the workforce."

"Drivers, there is no other concern."

Shortages of trucks and equipment are seen as a major barrier to growth and a contributing factor to lack of capacity.

"Equipment and getting the equipment to be able to do the work and the jobs. I'd say that is a 2-5-year problem."

"There's a concern on getting new equipment, I do believe it is temporary."

"Parts shortage - to fix trucks, to work on equipment."

The lack of enforcement of regulations as it comes to Driver Inc. is still top of mind for many executives and is seen as threat and unfair to those who respect the rules.

"The Driver Inc model is one of the challenges that might have a lot of good drivers in there that are being taken advantage of by the Driver Inc scheme. For all of us that remain in a non-Driver Inc model for employees, we end up paying the 10 days sick leave, etc. whereas those models don't. If the government says this is ok, then we will have to change our model to the Driver Inc model as well."

#1

Labour Shortage

#2

Equipment shortage

#3

Driver Inc.

Key Findings

1

DEMAND FOR SERVICES

Most senior executives report that demand for services has increased in the past year with some saying that it has increased beyond what they can handle, causing them to have to refuse work. Some also mentioned that they are having issues meeting demand not because it has increased, but because their capacity is limited due to lack of drivers, trucks and parts.

2

SUPPLY CHAIN

A majority of trucking executives view the current supply chain as weaker than what it was a year ago and mention that they are facing a lack of capacity to move goods because of a shortage of drivers and equipment to move the goods. They also mention that they view it as weaker because of the lack of certainty and stability, and cross border challenges such as the vaccine mandate.

3

IMPACT OF INFLATION

Trucking executives are split on the impact inflation has had on the trucking industry, with some saying that on one hand, it's positive because it has allowed them to increase their rates and open up the discussion about pricing, but on the other hand, it is negative because the price of labour, equipment and fuel are up and those costs are ultimately passed on to Canadians.

Key Findings



AVAILABILITY OF TRUCKS

A strong majority of trucking executives say that the availability of truck is a problem in the trucking industry but are split on whether that problem is minor or major. Most mention that they have experienced significant delays when ordering trucks and parts for repairs with many being backlogged for over a year. A couple mention that they have enough trucks, but they are parked because they don't have enough drivers to fill those seats.



LABOUR CONSTRAINT

Labour constraints remain a major problem for trucking executives overall, as it was in November 2021. Most are saying that labour shortages are worse than a year ago and they have difficulty finding new drivers, especially experienced and skilled drivers. All executives interviewed say that they are trying a variety of different things to help attract drivers such as advertisement, higher pay, bonuses or benefits and being more implicated in the training process by either partnering with the government or offering training to new drivers.



GOVERNMENT HELP

When dealing with the government of Canada, Trucking executives would like the CTA to focus on addressing the labour shortage by making truck driving a certified trade, incentivizing training programs and making it more attractive as a career option. They also would like increased enforcement (i.e., dealing with Driver Inc.) and helping with immigration and access to foreign workers to help ease the labour shortage.



Overall business trends

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Executives report the ability to increase rates along with a lack of capacity as the major changes in the trucking industry in the past year. As current issues of concern, labour issues and equipment shortages are top mentions among trucking senior executives.

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Positive changes in past year

The ability to increase rates is top positive change in the trucking industry in the past year

Asked what positive changes they have observed in the trucking industry in the past year, senior executives most frequently mention the ability to increase rates (17 out of 36), followed by improved public perception of truckers and the trucking industry (13 out of 36), lobbying and pressure on the government for changes/better relationship with government and that generally the Covid situation has improved, and things are opening up (five out of 36, each). Other mentions included demand being high and there being a lot of volume (three out of 36) and customers being more willing to have discussions (two out of 36). Four senior executives mentioned that they couldn't think of any positive changes in the trucking industry in the past year.

Q

What major positive changes, if any, have you observed in the trucking industry in the past year? [OPEN]

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“The most favorable in terms of rate structure that we've seen in a while there was no need to charge some decent rates for services.”

“The demand is outstripping supply.”

“The amount of work is great, tremendous volume of freight being moved.”

“We've seen rates go up, capacity has been tight, and although it's tough on the market, it's been a good thing for carriers.”

“The customer's appetite for having a discussion around challenges in general (pricing for sure, but even around timeliness at facility).”

”

Negative changes in past year

Q

What major negative changes, if any, have you observed in the trucking industry in the past year? [OPEN]

Shortage of labour/drivers is the top negative change in the trucking industry in the past year

A majority of senior executives say that the major negative changes they have observed in the trucking industry in the past year is a lack or shortage of labour (drivers) and acceleration of retirements (25 out of 36). Over one in three mention government regulations (i.e. the 10 paid sick days and the vaccine mandate) have been negative (13 out of 36). Also mentioned was equipment costs and difficulty finding equipment and trucks due to supply chain issues (nine out of 36), worsened public perception of truckers (seven out of 36), fuel prices and non-compliance by some players in the industry such as Driver Inc. (five mentions each). Three senior executives mentioned an increase in operating costs and rent as a major negative change in the past year.

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“Most recently – the mandatory cross border vaccine mandate.”

“The biggest challenge always remains the lack of skilled labour, in the last year or two the administration and management has also been a challenge in addition to truck drivers.”

“The pandemic and all the impacts that it has had in all of the financial markets we have seen. It has created an acceleration of retirements.”

“Vaccine mandates have been problematic.”

“Equipment cost and availability.”

”

Change in demand for services in past year

Q

How has demand for services changed in the past year? [OPEN]

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“There is a real shortage of capacity out there and probably the tightest capacity we've seen in generations I would say.”

“It's improved because of the supply shortage right now. Coupled with the driver shortage, it has pushed up the wages for the drivers which is a good thing.”

“Demand for services is on the rise partly due to lack of supply.”

“Many drivers were forced out of the industry through COVID, carriers are not meeting the demands of our customers.”

“Demand has increased. We've seen a great demand for warehousing. Increased for LTL too.”

“The types of services haven't changed but the need for them has grown”

”

Most senior executives agree that demand for services has increased in the past year

A strong majority of senior executives agree that demand has increased in the past year (23 out of 36), with some of those senior executives even saying that demand has increased beyond what they can handle (six out of 36). About a third mention that demand hasn't directly increased but that because of a shortage of drivers and trucks, they are experiencing a decrease in capacity on their end (11 out of 36). Some senior executives mention that specific sectors have seen an increase such as warehousing, or LTL (two mentions).

Expected changes in the trucking industry in the next 10 years

Reduction of fossil fuel use and carbon emissions is the top change expected to occur in the next 10 years

Similar to the November 2021 wave, senior executives mention electrification and the phasing out of fossil fuels (23 out of 36), automation and increases in logistical technologies (10 out of 36) and labour shortages (14 out of 36) are the major changes they expect to occur in the trucking industry in the next 10 years. Also mentioned was the recognition of driving as a profession or skilled labour, (five out of 36), that costs to operate will continue to increase (five out of 36), consolidation of businesses (four out of 36) and better pay and quality of life for drivers (four out of 36).

Those that mentioned the electrification and the phasing out of fossil fuels say that they expect electric trucks to become more popular for shorter rides and local destinations, but that it will be harder to implement for longer haul deliveries, while other say that there will be strong pressure to reduce emissions. Trucking executives that mentioned the continuation of the labour shortage say they expect truckers to retire and not have enough truck drivers to replace them, that the struggle to find new drivers will continue and this is a problem that will need to be addressed or it will put a major stress on the supply chain.

Q

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

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“Major change with the drivers, if it doesn’t change, it’s going to put a big stress on supply chain. If no one can find drivers, goods won’t move, rates will go up. A lot of people see that now, delivery of things take time, and it’s expensive.”

“There will certainly be a leaning towards more alternative fuels. I really don’t see diesel on long haul in Canada being ever supplemented or supplanted by electric. It’s too cold and too far distances. Electric vehicles in the city and local street trucks could work, but it all depends on how much assistance we get with infrastructure for charging stations.”

“A lot more consolidation, a lot of owners – acquisition requests – retirement plans and cash flow problems, especially as fuel impacts cash flow.”

“Emissions – strong pressure on emissions.”

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Issues of concern in the trucking industry

Labour shortage remains top issue of concern for trucking executives followed by equipment shortages

Almost all senior executives mention the labour shortage as their top issue of concern when it comes to the trucking industry today (34 out of 36). Senior executives see retirements brought on by the pandemic, difficulty finding new recruits, and barriers to immigration programs for potential recruits 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. Many senior executive mention that equipment shortage is a top issue of concern currently, which wasn't mentioned when asked in November 2021.

Similar to the previous wave, many senior executives also mention industry players that don't play by the rules such as Driver Inc. are still an issue of concern for them and there is a lack of enforcement of regulations in this regard (nine mentions). New this wave is the mention of the enactment of the 10 paid sick days which they believe was done without consultation of the industry (seven mentions). Finally, some stakeholders mention that working conditions and safety are a top issue of concern for them as they have noticed drivers who lack training and also mention safety on the road in congestion and around other drivers.

Q

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

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“Safety is another concern that I have centred around the congestion on highways and the growth in automobile applications and that trucks have to deal with that drivers are not as good as they used to be. So there are concerns from a safety perspective for our people it just means that we need to invest more in safety across the board than we traditionally had.”

“Supply of qualified drivers is probably the biggest concern”

“The employment piece is by far the biggest concern, so attracting and retaining drivers.”

“The driver shortage. It's been a couple years that we have been recruiting from abroad, and it hasn't gotten easier, it's actually been harder. We've been waiting for applications for a year and a half, it takes a very long time.”

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Inflation and the supply chain

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Trucking executives are split on the impact inflation has had on the supply chain and view it as weaker than what it was a year ago. They most frequently mention issues ordering parts and new trucks as top of mind in relation to the trucking industry.

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Impact of inflation on the trucking industry

Truckers are split on whether the impact of inflation has been positive or negative on the trucking industry

Twenty out of 36 trucking executives say that inflation has had a negative impact on the trucking industry, while 15 either say it has had a positive (seven out of 26) or somewhat positive impact (eight out of 36). Those that mention that the impact has been negative say that is it because costs of parts has gone up (14 out of 36), increases in labour costs and driver wages (12 out of 36), cost of fuel has gone up (eight out of 36) and that costs of operating have gone up (four out of 36). Those that think inflation has had a positive/somewhat positive impact mention that it's positive for truckers/trucking executives as they can increase rates because of it (14 out of 36), and that shippers and customers are open to conversation about prices (four out of 36).

Some executives mention that in the end, the impact is not positive because although they can increase their prices, this leads to an increase of prices for Canadians in the end (six out of 36), and that they believe it is not good for the economy and that it will lead to a recession (three out of 36).

Q

Do you believe inflation has had a positive, a somewhat positive, a somewhat negative, a negative or no impact on the trucking industry? [IF BELIEVES IT HAS HAD IMPACT] How has inflation impacted the trucking industry? [OPEN]

	Frequency (n=36)
Positive	7
Somewhat positive	8
Somewhat negative	-
Negative	20
No impact	-
Unsure	1

“

[Negative] “The cost of parts and services has gone up dramatically, so our costs of operations has gone up.”

[Somewhat positive] “It has driven our rates up, but it is negative because it has driven up our costs enormously so inflation has hurt us from that standpoint, but I think the labour shortage and equipment shortage have drove rates higher so more good than bad has happened.”

[Positive] “Inflation is the result of supply and demand and demand is exceeding supply now significantly which moves the rates upwards and those rates are advantageous, there are cost offsets as well but the net result is positive.”

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Thoughts on the supply chain

Trucking executives agree that the trucking industry can have a positive impact on the supply chain

All trucking executives interviewed say they believe the trucking industry can have a positive (33 out of 36) or somewhat positive (three out of 36) impact on the supply chain by delivering goods to Canadians.

Asked what comes to mind when thinking of the supply chain in relation to the trucking industry, trucking executives most frequently mention the inability to buy trucks and equipment (12 out of 36), the key role of the trucking industry to keep the supply chain going (10 out of 36), the current lack of capacity and the inability to meet demand (seven out of 36).

Also mentioned was that they feel it is tight and restricted, broken/crippled/t risk, and wait times, delays and bottle necks (three mentions each).

Potential impact the trucking industry can have on the supply chain	Frequency (n=36)
Positive	33
Somewhat positive	3
Somewhat negative	-
Negative	-
No impact	-
Unsure	-

Q

When you think of the supply chain in relation to the trucking industry, what comes to mind? [OPEN]

Do you believe the trucking industry can have a positive, somewhat positive, somewhat negative, negative, or no impact on the supply chain by delivering goods to Canadians?

"Interruption – interrupted through covid."

"I cannot buy a truck, I cannot buy a trailer for a couple of years. That means I have to patch equipment up. Trucks will be inoperable but I will still have to make payments on them and that is happening today."

"The supply chain has been restricted because of COVID. There was a lot of uncertainty, factories shut down and it created a snowball effect that is continuing today."

"Without the trucking industry operating well, there is no supply chain. There's lots of components, but we have a huge impact. It's integral to operating the supply chain."

"I think of the West Coast ports, the congestion of the ports and intermodal traffic coming from the ports into central and eastern Canada. I see the trucking industry coming in at the tail end of the supply chain, and all time high demand."

"For the industry, we haven't kept up because of our inability to have enough equipment around or people to operate it. We have let the supply chain down to some degree. It impacts procurement of parts, etc."

Strength of the supply chain

Trucking executives view the current supply chain as weaker than what it was a year ago

A comfortable majority of trucking executives believe that the supply chain is weaker (18 out of 36) or somewhat weaker (seven out of 36) than what it was a year ago. Five believe it is similar, and five believe it is stronger (one out of 36) or somewhat stronger (four out of 36) than a year ago.

Asked the reason for their opinion, those that believe it is weaker or somewhat weaker say it's because of the lack of capacity (drivers and/or equipment) to move goods (13 out of 36), because cross-border challenges and restrictions such as the vaccine mandate have impacted the supply chain (three out of 36), and because of a lack of certainty and stability (three out of 36). Those that mention that the supply chain is stronger or somewhat stronger mention that they are seeing some improvements such as goods coming in (four out of 36). Those that say they believe the supply chain is similar to what it was a year ago mention that they are becoming more creative and are finding different ways to move goods to meet demand (three out of 36).

Q

Do you believe the supply chain is stronger, somewhat stronger, somewhat weaker or weaker, or is it similar to what it was a year ago? Why do you have that opinion? [OPEN]

	Frequency (n=36)
Stronger	1
Somewhat stronger	4
Somewhat weaker	7
Weaker	18
Similar	5
Unsure	1

“

“There just isn’t enough capacity to move it and folks who are moving freight are sharing a greater burden of the workload. There is potential risk for further collapse when people exit the industry.”

“I do feel we are getting the freight moved eventually, it is getting done just maybe in different ways. Way more people are getting their own smaller trucks, we are seeing big trends and leveraging moving our stuff through them. We are leaning more into logistics now – a lot littler guys are coming in and need freight to haul.”

“Cross border issues. Canadians use the majority of goods between Canada and the US, our ability to meet customer needs is not manageable.”

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Availability of trucks and labour shortages

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Strong majority of trucking executives agree that there is a problem with the availability of truck. Most believe that labour shortages have continued to increase in the past year.

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Availability of trucks

Trucking executives believe that the availability of trucks is a problem in relation to the trucking industry but are split on whether that it is a major or minor problem

Most trucking executives believe that the availability of trucks is a major (19 out of 36) or a minor (14 out of 36) problem in the trucking industry. Three trucking executives believe that the availability of trucks is not currently a problem in the trucking industry.

Ask what comes to mind when they hear about the availability of trucks in relation to the trucking industry, most trucking executives mention a shortage of trucks and equipment (19 out of 36), a shortage of drivers (six out of 36), the lack of availability or scarcity in general (six out of 36). Three executives mentioned that there are lots of opportunities and more demand, and one mentioned that availability is good.

	Frequency (n=36)
Major problem	19
Minor problem	14
Not a problem	3

Q

When you hear about availability of trucks in relation to the trucking industry, what comes to mind? [Open-ended]
Do you think the availability of trucks is a major problem, minor problem or not a problem in the trucking industry?

“

“There is more freight to haul than trucks to haul it. It's a concern for consumers – not a concern for the trucking industry.”

“Our availability is good. We saw a real pinch point in January and February, but it has gotten better since then. We have the ability to pay our people more with the increased rates so there are a lot of good things coming out of all this.”

“I think of the difference between an individual company vs the industry. As we are going through the spike in demand, all loads that want to get moved aren't necessarily being moved in an expedient way. We have a situation with the shortage – but generally speaking, we have a shortage of drivers yet all loads get moved. Is it really a shortage or an allocation issue? There is definitely an acute shortage at the moment, but I'm not sure it's a long-term issue.”

“Problems, tough to get trucks, I ordered 33 and received 9 that I ordered more than a year ago.”

“It's very volatile, and very unpredictable.”

“Not that many, it's tough. We had a conference with manufacturers and they've never seen this before. There's no trucks until 2023, no one knows when it will get better, and also there's a shortage of parts so it's not helping overall.””

Labour shortage

Most trucking executives agree that labour shortages have increased compared a year ago

Thirty-three out of 36 trucking executives say that labour shortages have increased compared to a year ago, which continues the trend that was observed when this question was asked in November 2021, while three say that they have stayed the same. Trucking executives are most likely to say that the areas where they see the greatest shortages are drivers (30 out of 36), mechanics (10 out of 36), administrative and operational staff (six out of 36) and technicians (four out of 36).

Asked what they are doing to help ease the labour shortage they are facing, trucking executives most frequently mention promotion and marketing (16 out of 36), developing and expanding training programs (14 out of 36), increasing wages (10 out of 36), immigration initiatives (eight out of 36), retention and signing bonuses and benefits (eight out of 36), offering encouragement, improved morale, or engaging potential entrants (four mentions) and changing expectations and accepting candidates with less training or experience (four mentions).

*Question from Nov 2021 wave: Would you say that labour shortages have increased, decreased or stayed the same since before the pandemic?

Q

Would you say that labour shortages have increased, decreased or stayed the same compared to a year ago?

Where do you see the greatest shortages if any? [Open-ended]

[IF FACING LABOUR SHORTAGES] What are you doing to help ease the labour shortage you are facing? [OPEN]

	May 2022 (n=36)	November 2021* (n=30)
Increased	33	26
Decreased	-	-
Stayed the same	3	4

Areas with greatest shortages – Top mentions	Frequency (n=36)**
Drivers	30
Mechanics	10
Administrative/operational staff	6
Technicians	4

**Based on up to three mentions



Regulations and the government

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Trucking executives would like more consultation with the industry before government enacts new regulations and would like the CTA to focus on the labour shortage and enforcement of regulations, especially Driver Inc.

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Priorities for the CTA when dealing with the Government of Canada

Senior executives want the CTA to focus on addressing the labour shortage and Driver Inc.

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 most frequently mention addressing the labour shortage (15 out of 36), followed by addressing the Driver Inc. issue and increasing enforcement of regulations (12 out of 36).

Also mentioned was focusing on immigration and foreign workers to help ease the labour shortage (9 out of 36), environmental legislations and the carbon tax (six out of 36), financial support to the industry and accessibility (four out of 36), border restrictions and the vaccine mandate, and the ELD mandate (three out of 36, each).

Q

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

“

“Driver shortage, including programs to making truck drivers a certified trade, bringing in immigrants to recruit new drivers.”

“Trying to get more people interested in the industry is priority number one.”

“The environmental aspect, I know we have to protect our planet. The industry is such a big user of energy that it really hits us with a carbon tax. Not sure how realistic their goals are. They continue to boggle my mind and its worrisome.”

“Bringing in foreign workers – foreign worker program.”

“More consultation – we are a unique industry, so when they are implementing new regulations, it can’t just be a broad stroke, it should be treated accordingly.”

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New government regulations

Ten mandatory paid sick days and not enough consultation with the industry are top of mind when it comes to new government regulations

When asked what comes to mind when they hear about new government regulations in relation to the trucking industry, senior executives most frequently mention the 10 mandatory paid sick days (12 out of 36), that the government doesn't consult the industry (seven out of 36), ELD enforcement and safety (five out of 36), that they are not enforced (Driver Inc) and that it makes it harder and more expensive to operate especially for compliant carriers (four out of 36, each). Also mentioned was good intentions but not realistic (three out of 36), that there are too many, bad news and negative in general, and the vaccine mandate (two out of 36, each).

Q

When you hear about new government regulations in relation to the trucking industry, what comes to mind? [Open-ended]

“

“Too many. The OTA and CTA are both guilty. Government tends to overregulate, OTA and CTA are too quick to support the over regulations. They support new and over regulations.”

“Negative, new challenges, typically new hurdles for our industry.”

“I'm not really impressed with the federal government. The 10 sick days is ridiculous, I don't like that at all. And they seem to be dragging their feet on fixing some of the issues.”

“Knee jerk reaction; they bring in new regulations based on a whim without knowledge of the impact on the industry or clients.”

“Training for drivers. Here we have the CFTR, the only issue is that is a four and half month program, but we can still have drivers that only go through 2 weeks of training. The MELT program is not really well supported, you can go from one school to another and the program is different. I'm happy about MELT but it is not well regulated or managed. It should be more federally regulated, and also having the price that is the same across the board.”

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Advice for the CTA

Executives suggest that the CTA could be more vocal and increase dialogue with the government to help support the trucking industry

Asked what piece of advice they have for the CTA to help them manage challenges in the trucking industry, 15 executives suggest that the CTA could be more vocal and have more dialogue with the government, while 13 mentioned that the CTA is already on the right track and to keep up the good work. Three mention that they need less government regulations and red tape, and they would like to have support programs that are beneficial to the industry. Two suggest that they would like the CTA to focus on having a fair playing field.

Additionally, when trucking executives were asked if there were other issues related to the trucking industry that the CTA should consider, seven mentioned that they believe the CTA is on the right track and to keep up the good work, six again mention that they would like the CTA be more vocal/ more dialogue with the government, while others mention they would like to see more truckers, more support generally, highway congestion and stopping people from cheating in the industry (two mentions each). Twelve mentioned that there weren't any other issues.

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]

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“Getting people to drive trucks is going to be the biggest issue for us and will be for a long time to come.”

“Continue to do what they're doing today and not be discouraged by the slow motion of the issues that they are working on.”

“Stay the course, the CTA and the industry are very much aligned with what we see as the vision for the future, so I say the course we are on is a very good one and continue to share this and the views of the industry with the government.”

“There's a role for them to play in alternate fuel, in making it easier for the industry. They do have programs but they're almost inaccessible, so lobby the government to make those programs easier to access.”

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Additional comments

Q

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

“I think their agenda is good we just don’t stand up strong enough and focus on labour and training and get more people in industry, create sense in public of the importance of it.”

“They are doing a good”

“Just thanks for the effort they put in and the lobbying they do. They listen to our concerns and move on them - I am proud to be a part of it.”

“No, I commend what they do.”

“Promote tar sands and Canadian promotion of oil and exporting of oil.”

“It's a tough bracket, not the same as it used to be. It's tough to make money. I got to find people; I just can't find them. I need 10-20 and because of that my revenue is down. If I had more drivers, I could be more profitable, I got a revenue problem. And it's not going away. The biggest hinderance is driver shortage. CTA is doing a great job; they are a good group of people.”

“We should limit ease of access to start a trucking company. In Ontario, I can go buy a booklet for \$500, get my CVOR, I can become a trucking company. I would like to see something similar to what they do for airlines.”

On behalf of the Canadian Trucking Alliance, Nanos conducted live interviews with 36 influencers and stakeholders in the housing industry between April 13th and May 6th, 2022. Participants were recruited using a list provided by the CTA. Interviews were conducted in English.

Each interview was a maximum of 30 minutes in length. A total of 36 individuals participated in the research, with an estimated response rate of 26%.

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

Response Rate		
A	Number of Contacts Provided by Client	141
B	Invalid Contacts	-
C	Potential Contacts (C=A-B)	141
D	Number of Completed Interviews	36
E	Contacted with No Response/Unavailable	106
F	Refusal	-
G	Response Rate (G=C/D)	26%





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



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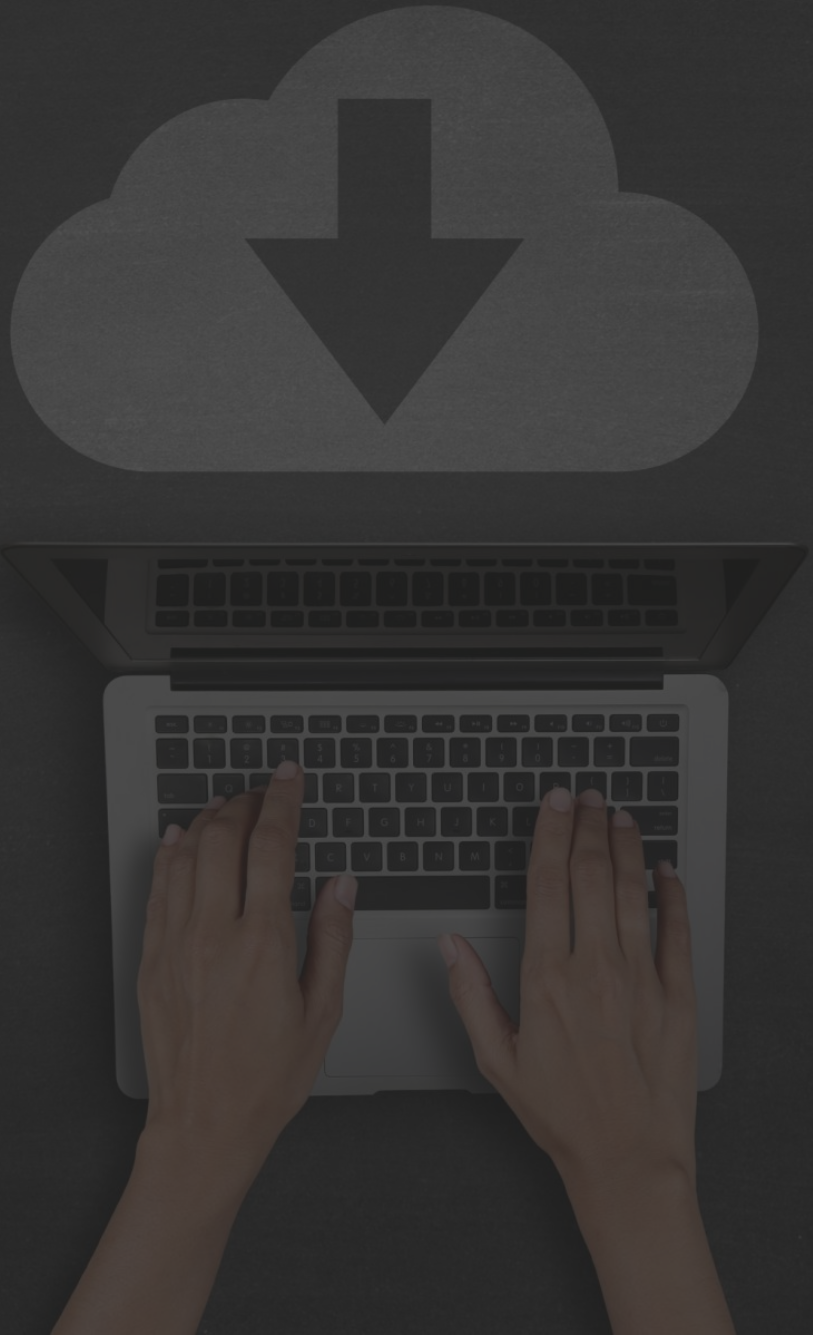
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TABULATIONS



NOTES FROM THE INTERVIEWS





2022-2132 – Canadian Trucking Alliance – In-depth Interviews – STAT SHEET

		Responses*		Percent of
		N	Percent	Cases
Question - What major positive changes, if any, have you observed in the trucking industry in the past year? [OPEN]	Ability to increase rates	17	31.5%	47.2%
	Can't think anything positive	4	7.4%	11.1%
	Covid situation has improved/opening up	5	9.3%	13.9%
	Improved public perception of truckers/trucking industry	13	24.1%	36.1%
	Lobbying and pressure on the government for changes/better relationship with government	5	9.3%	13.9%
	Customers more willing to have discussions	2	3.7%	5.6%
	Demand is high/a lot of work and volume	3	5.6%	8.3%
	Resiliency and adaptation form the industry	1	1.9%	2.8%
	Mandatory entry level training	1	1.9%	2.8%
	Issues with manufacturers have been resolved	1	1.9%	2.8%
	Industry is more stable	1	1.9%	2.8%
	Unsure	1	1.9%	2.8%
	Total	54	100.0%	150.0%

*Based on up to three mentions

		Responses*		Percent of
		N	Percent	Cases
Question - What major negative changes, if any, have you observed in the trucking industry in the past year? [OPEN]	Government regulations (10 paid sick days) and COVID-19 mandates	13	17.1%	36.1%
	Lack / shortage of labour and acceleration of retirements	25	32.9%	69.4%
	Employment expectations are too high	2	2.6%	5.6%
	Worsened public perception of truckers/trucking industry	7	9.2%	19.4%
	Equipment costs and difficulty finding equipment due to supply chain issues	9	11.8%	25.0%
	Fuel Prices	5	6.6%	13.9%
	Non-compliance by some players in the industry (Driver Inc.) and lack of enforcement	5	6.6%	13.9%
	Price fluctuations/uncertainty	1	1.3%	2.8%
	Lack of capacity to take on work	1	1.3%	2.8%
	Increase in costs/rent	3	3.9%	8.3%
	Government is behind in terms of licencing drivers	1	1.3%	2.8%
	Difficulty adjusting to working from home/employee flexibility	2	2.6%	5.6%
	Roads are more dangerous in terms of drivers not paying attention	1	1.3%	2.8%
	Floods in BC	1	1.3%	2.8%
	Total	76	100.0%	211.1%

*Based on up to three mentions

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - How has demand for services changed in the past year? [OPEN]	Demand for services has increased	17	47.2	47.2	47.2
	There's a shortage of drivers, trucks which lead to lack of capacity	11	30.6	30.6	77.8
	Increased beyond what we can handle	6	16.7	16.7	94.4
	Other	2	5.6	5.6	100.0
	Total	36	100.0	100.0	



2022-2132 – Canadian Trucking Alliance – In-depth Interviews – STAT SHEET

		Responses*		Percent of Cases
		N	Percent	
Question - What are the major changes you expect to occur in the trucking industry in the next 10 years? Any others? [OPEN]	The phasing out of fossil fuels and Carbon emissions/electric trucks	23	30.7%	63.9%
	Consolidation of businesses	4	5.3%	11.1%
	Recognition of driving as a profession / skilled labour	5	6.7%	13.9%
	An increase in logistical technology and automation	10	13.3%	27.8%
	The labour shortages will have to be addressed/retirements/median age will increase	14	18.7%	38.9%
	Better pay and quality of life for drivers	4	5.3%	11.1%
	Costs to operate will continue to increase/insurance will increase	5	6.7%	13.9%
	More regulations/leveling the playing field	2	2.7%	5.6%
	Other	4	5.3%	11.1%
	Unsure	4	5.3%	11.1%
Total		75	100.0%	208.3%

*Based on up to three mentions

		Responses*		Percent of Cases
		N	Percent	
Question - What are your top issues of concern when it comes to the trucking industry today? Any others? [OPEN]	Lack / shortage of labour	34	39.5%	94.4%
	Equipment shortage	11	12.8%	30.6%
	Government regulations without consultation of the Industry (for example 10 paid sick days)	7	8.1%	19.4%
	Lack of enforcement of regulations / Drivers INC.	9	10.5%	25.0%
	Infrastructure/Highway congestion	4	4.7%	11.1%
	Working conditions / Safety	5	5.8%	13.9%
	The environment	2	2.3%	5.6%
	Price of fuel	4	4.7%	11.1%
	Insurance/insurance costs	2	2.3%	5.6%
	Price of equipment	1	1.2%	2.8%
	Competition/hard for smaller companies	3	3.5%	8.3%
	Other	4	4.7%	11.1%
Total		86	100.0%	238.9%

*Based on up to three mentions

		Frequency	Percent	Valid	Cumulative
				Percent	Percent
Question – Do you believe inflation has had a positive, a somewhat positive, a somewhat negative, a negative or no impact on the trucking industry?	Positive	7	19.4	19.4	19.4
	Somewhat positive	8	22.2	22.2	41.7
	Negative	20	55.6	55.6	97.2
	Unsure	1	2.8	2.8	100.0
	Total	36	100.0	100.0	



2022-2132 – Canadian Trucking Alliance – In-depth Interviews – STAT SHEET

		Responses*		Percent of
		N	Percent	Cases
Question - [IF BELIEVES IT HAS HAD IMPACT] How has inflation impacted the trucking industry? [OPEN]	Costs of parts have gone up	14	19.7%	38.9%
	Cost of fuel has gone up	8	11.3%	22.2%
	It's positive for us/we can increase rates	14	19.7%	38.9%
	Shippers/customers are open to conversations about prices	4	5.6%	11.1%
	The trucking industry increasing prices leads to increase of prices for Canadians in the end	6	8.5%	16.7%
	It is not good for the economy/It will lead to a recession	3	4.2%	8.3%
	Increase in labour costs/driver wages	12	16.9%	33.3%
	Costs of operating have gone up	4	5.6%	11.1%
	Brought uncertainty and unpredictability	2	2.8%	5.6%
Other		4	5.6%	11.1%
Total		71	100.0%	197.2%

*Based on up to three mentions

		Responses*		Percent of
		N	Percent	Cases
Question - When you think of the supply chain in relation to the trucking industry, what comes to mind?	Interrupted/disrupted	2	3.6%	5.6%
	Wait times/delays/bottlenecks	3	5.5%	8.3%
	Tight/restricted	3	5.5%	8.3%
	Broken/crippled/at risk	3	5.5%	8.3%
	Inability to buy trucks/equipment	12	21.8%	33.3%
	Key role of trucking industry to maintain it/keep it going	10	18.2%	27.8%
	Our lack of capacity/can't meet demand/stress	7	12.7%	19.4%
	Interconnected/all the different aspects of it	1	1.8%	2.8%
	West Coast ports	2	3.6%	5.6%
	Big players that cover the whole supply chain (ex. Amazon)	1	1.8%	2.8%
	Causing issues with customers	1	1.8%	2.8%
	Good for the industry/good for us	1	1.8%	2.8%
	China/over reliance on China/need to detach	2	3.6%	5.6%
	Frustration with continued driver shortages	2	3.6%	5.6%
	Trying to balance supply and demand	1	1.8%	2.8%
	Companies turning to in-house logistics/take control	1	1.8%	2.8%
	Increasing local presence	1	1.8%	2.8%
	Process of manufacturing	2	3.6%	5.6%
Total		55	100.0%	152.8%

*Based on up to three mentions

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Do you believe the supply chain is stronger, somewhat stronger, somewhat weaker, or weaker, or is it similar to what it was a year ago?	Stronger	1	2.8	2.8	2.8
	Somewhat stronger	4	11.1	11.1	13.9
	Somewhat weaker	7	19.4	19.4	33.3
	Weaker	18	50.0	50.0	83.3
	Similar	5	13.9	13.9	97.2
	Unsure	1	2.8	2.8	100.0
	Total	36	100.0	100.0	



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			Do you believe the supply chain is stronger, somewhat stronger, somewhat weaker or weaker, or is it similar to what it was a year ago?						Total
			Stronger	Somewhat stronger	Somewhat weaker	Weaker	Similar	Unsure	
Question - Why do you have that opinion? [OPEN]	There is a lack of capacity (drivers and/or equipment) to move goods	Count	0	0	3	10	0	0	13
			0.0%	0.0%	42.9%	58.8%	0.0%	0.0%	37.1%
	COVID-19 waves/outbreaks/The COVID-19 outbreak in Shanghai will likely worsen backlogs/shortages	Count	0	0	2	0	0	0	2
			0.0%	0.0%	28.6%	0.0%	0.0%	0.0%	5.7%
	Cross-border challenges and restrictions have impacted the supply chain	Count	0	0	0	3	0	0	3
			0.0%	0.0%	0.0%	17.6%	0.0%	0.0%	8.6%
	We are becoming more creative/finding different ways to move goods to meet demand	Count	0	0	0	0	3	0	3
			0.0%	0.0%	0.0%	0.0%	60.0%	0.0%	8.6%
	Backups/congestion at ports	Count	0	1	0	1	0	0	2
			0.0%	25.0%	0.0%	5.9%	0.0%	0.0%	5.7%
Total	Seeing some improvement/seeing goods come in	Count	1	3	0	0	1	0	5
			100.0%	75.0%	0.0%	0.0%	20.0%	0.0%	14.3%
	Lack of certainty/lack of stability	Count	0	0	1	2	1	1	5
			0.0%	0.0%	14.3%	11.8%	20.0%	100.0%	14.3%
	Lack of efficiency	Count	0	0	0	1	0	0	1
			0.0%	0.0%	0.0%	5.9%	0.0%	0.0%	2.9%
	Increased rates are a sign of a failing supply chain	Count	0	0	1	0	0	0	1
			0.0%	0.0%	14.3%	0.0%	0.0%	0.0%	2.9%
Total			Count	1	4	7	17	5	35
				100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Do you believe the trucking industry can have a positive, somewhat positive, somewhat negative, negative, or no impact on the supply chain by delivering goods to Canadians?	Positive	33	91.7	91.7	91.7
	Somewhat positive	3	8.3	8.3	100.0
	Total	36	100.0	100.0	

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - When you hear about availability of trucks in relation to the trucking industry, what comes to mind? [OPEN]	Shortage in supply of trucks/equipment	19	52.8	52.8	52.8
	Shortage of drivers	6	16.7	16.7	69.4
	The lack of availability/scarcity (general)	6	16.7	16.7	86.1
	Lots of opportunity/more demand	3	8.3	8.3	94.4
	Availability is good	1	2.8	2.8	97.2
	Other	1	2.8	2.8	100.0
	Total	36	100.0	100.0	

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Do you think the availability of trucks is major problem, minor problem or not a problem in the trucking industry?	Major problem	19	52.8	52.8	52.8
	Minor problem	14	38.9	38.9	91.7
	No problem	3	8.3	8.3	100.0
	Total	36	100.0	100.0	

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		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Would you say that labour shortages have increased, decreased or stayed the same compared to a year ago?	Increased	33	91.7	91.7	91.7
	Stayed the same	3	8.3	8.3	100.0
	Total	36	100.0	100.0	

		Responses*		Percent of Cases
		N	Percent	
Question - Where do you see the greatest shortages if any? [OPEN]	Drivers	30	40.0%	83.3%
	Mechanics	10	13.3%	27.8%
	Long haul	3	4.0%	8.3%
	Technicians	4	5.3%	11.1%
	Low margin commodities	1	1.3%	2.8%
	High skilled positions	1	1.3%	2.8%
	All industries	3	4.0%	8.3%
	Admin/operational Staff	6	8.0%	16.7%
	Dock Staff	3	4.0%	8.3%
	Operators	1	1.3%	2.8%
	Night shift drivers	1	1.3%	2.8%
	Regional staff	1	1.3%	2.8%
	Warehousing	3	4.0%	8.3%
	Dispatchers	2	2.7%	5.6%
	Across the country	2	2.7%	5.6%
	Crossborder drivers	2	2.7%	5.6%
	IT/Technology	1	1.3%	2.8%
	Other	1	1.3%	2.8%
Total		75	100.0%	208.3%

*Based on up to three mentions

		Responses*		Percent of Cases
		N	Percent	
Question - [IF FACING LABOUR SHORTAGES] What are you doing to help ease the labour shortage you are facing? [OPEN]	Increased wages	10	14.1%	27.8%
	Promotion/marketing	16	22.5%	44.4%
	Developing/expanding training programs	14	19.7%	38.9%
	Immigration initiatives	8	11.3%	22.2%
	Change expectations/accept candidates with less training or experience	4	5.6%	11.1%
	Modernizing office space/amenities for employees	1	1.4%	2.8%
	Partnering/advocating with provincial government for training programs	3	4.2%	8.3%
	Accommodation/flexibility in scheduling	3	4.2%	8.3%
	Encouragement/improved morale/engaging potential entrants	4	5.6%	11.1%
	Retention bonuses, signing bonuses, benefits	8	11.3%	22.2%
	Total	71	100.0%	197.2%

*Based on up to three mentions



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		Frequency	Percent	Valid Percent	Cumulative Percent
Question - In dealing with the Government of Canada what should be the top two priorities you would like the CTA to focus on - FIRST PRIORITY [OPEN]	Immigration and foreign workers	5	13.9	13.9	13.9
	Address labour shortage (attract people, training, etc.)	9	25.0	25.0	38.9
	Ten paid sick days legislation	3	8.3	8.3	47.2
	Driver Inc/increasing enforcement/level playing field	7	19.4	19.4	66.7
	Environmental legislation/Carbon tax	2	5.6	5.6	72.2
	Border restrictions/vaccine mandate	2	5.6	5.6	77.8
	Ease burden of regulations	1	2.8	2.8	80.6
	Financial support to the industry and accessibility	1	2.8	2.8	83.3
	Inflation/the economy	2	5.6	5.6	88.9
	Consulting the industry	1	2.8	2.8	91.7
	Keep doing what they're doing	1	2.8	2.8	94.4
	Insurance	1	2.8	2.8	97.2
	The government is the problem	1	2.8	2.8	100.0
	Total	36	100.0	100.0	

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - In dealing with the Government of Canada what should be the top two priorities you would like the CTA to focus on – SECOND PRIORITY [OPEN]	Immigration and foreign workers	4	11.1	12.9	12.9
	Address labour shortage (attract people, training, etc.)	6	16.7	19.4	32.3
	Driver Inc/increasing enforcement/level playing field	5	13.9	16.1	48.4
	Environmental legislation/Carbon tax	4	11.1	12.9	61.3
	Border restrictions/vaccine mandate	1	2.8	3.2	64.5
	Ease burden of regulations	1	2.8	3.2	67.7
	Financial support to the industry and accessibility	3	8.3	9.7	77.4
	ELD mandate	3	8.3	9.7	87.1
	Reduce taxes	2	5.6	6.5	93.5
	Image/perception of the industry	1	2.8	3.2	96.8
	Be proactive/not reactive	1	2.8	3.2	100.0
	Total	31	86.1	100.0	
Missing	System	5	13.9		
Total		36	100.0		

		Responses		Percent of Cases
		N	Percent	
Question - When you hear about new government regulations in relation to the trucking industry, what comes to mind? [OPEN]	There's too many	2	4.5%	5.6%
	10 mandatory paid sick days	12	27.3%	33.3%
	Bad news/negative	2	4.5%	5.6%
	They don't consult us	7	15.9%	19.4%
	Good intentions but not realistic	3	6.8%	8.3%
	They are not enforced (Driver Inc)	4	9.1%	11.1%
	Makes it harder/more expensive to operate	4	9.1%	11.1%
	ELD/safety	5	11.4%	13.9%
	Environmental regulations	1	2.3%	2.8%
	Vaccine mandate	2	4.5%	5.6%
	Training for drivers	1	2.3%	2.8%
	Other	1	2.3%	2.8%
	Total	44	100.0%	122.2%

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		Frequency	Percent	Valid Percent	Cumulative Percent
Question - 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]	On the right track/ keep up the good work	13	36.1	36.1	36.1
	Less government/Red tape	3	8.3	8.3	44.4
	Be more vocal/ more dialogue with the government	15	41.7	41.7	86.1
	Support programs that are beneficial to the industry	3	8.3	8.3	94.4
	A fair playing field	2	5.6	5.6	100.0
	Total	36	100.0	100.0	

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Are there any other issues related to the trucking industry that the CTA should consider? [OPEN]	On the right track/ keep up the good work	7	19.4	19.4	19.4
	More truck drivers	2	5.6	5.6	25.0
	Be more vocal/ more dialogue with the government	6	16.7	16.7	41.7
	Stop people from cheating in the industry	2	5.6	5.6	47.2
	More support	2	5.6	5.6	52.8
	Highway congestion	2	5.6	5.6	58.3
	Other	3	8.3	8.3	66.7
	No answer	12	33.3	33.3	100.0
	Total	36	100.0	100.0	

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Which province are you based in? [OPEN]	Ontario	15	41.7	41.7	41.7
	British Columbia	5	13.9	13.9	55.6
	Alberta	3	8.3	8.3	63.9
	Saskatchewan	3	8.3	8.3	72.2
	Manitoba	5	13.9	13.9	86.1
	Quebec	1	2.8	2.8	88.9
	Nova Scotia	1	2.8	2.8	91.7
	New Brunswick	2	5.6	5.6	97.2
	Ontario and Quebec	1	2.8	2.8	100.0
	Total	36	100.0	100.0	



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		Responses*		
		N	Percent	Percent of Cases
Question - What commodities do you carry most? [OPEN]	Food/perishables	15	25.4%	44.1%
	General freight	4	6.8%	11.8%
	Petroleum products	4	6.8%	11.8%
	Equipment, tools, and materials	8	13.6%	23.5%
	Consumer goods	5	8.5%	14.7%
	Chemicals and hazardous materials	3	5.1%	8.8%
	Automotive/tires	4	6.8%	11.8%
	Agriculture products	3	5.1%	8.8%
	Lumber products	2	3.4%	5.9%
	LTL/parcels	4	6.8%	11.8%
	Bulk liquids/bulk residuals	3	5.1%	8.8%
	Shipping containers	1	1.7%	2.9%
	Unsure	3	5.1%	8.8%
Total		59	100.0%	173.5%

*Based on up to three mentions

		Responses*		
		N	Percent	Percent of Cases
Question - What destinations do you deliver to most? [OPEN]	Western Provinces (BC, AB, SK, MN)	18	26.5%	52.9%
	United States	25	36.8%	73.5%
	Canada - unspecified	7	10.3%	20.6%
	Locations in Ontario	9	13.2%	26.5%
	Quebec	4	5.9%	11.8%
	Eastern provinces/Maritimes	2	2.9%	5.9%
	Mexico	1	1.5%	2.9%
	Unsure	2	2.9%	5.9%
Total		68	100.0%	200.0%

*Based on up to three mentions

		About how many loads did your company carry in 2021?	About how many trucks did your company operate in 2021?	About how many full-time employees, including support staff, did your company have in 2021?	About how many part-time employees, including support staff, did your company have in 2021?	About how many full-time drivers did your company have in 2021?	About how many part-time drivers did your company have in 2021?
N	Valid	31	34	34	32	34	34
	Missing	5	2	2	4	2	2
Mean		72166.13	1162.94	1005.68	179.06	423.74	29.38
Median		20000.00	110.00	177.50	10.00	102.50	4.00

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		Frequency	Percent	Valid Percent	Cumulative Percent
Question - About how many loads did you carry in 2021?	4000	1	2.8	3.2	3.2
	5000	4	11.1	12.9	16.1
	7800	1	2.8	3.2	19.4
	8000	1	2.8	3.2	22.6
	8500	1	2.8	3.2	25.8
	9000	1	2.8	3.2	29.0
	10000	3	8.3	9.7	38.7
	11000	1	2.8	3.2	41.9
	18000	1	2.8	3.2	45.2
	18250	1	2.8	3.2	48.4
	20000	1	2.8	3.2	51.6
	24000	1	2.8	3.2	54.8
	27600	1	2.8	3.2	58.1
	30000	2	5.6	6.5	64.5
	36000	1	2.8	3.2	67.7
	50000	1	2.8	3.2	71.0
	52000	1	2.8	3.2	74.2
	65000	1	2.8	3.2	77.4
	70000	1	2.8	3.2	80.6
	100000	1	2.8	3.2	83.9
	150000	1	2.8	3.2	87.1
	200000	1	2.8	3.2	90.3
	208000	1	2.8	3.2	93.5
	260000	1	2.8	3.2	96.8
	780000	1	2.8	3.2	100.0
	Total	31	86.1	100.0	
Missing	Unsure	4	11.1		
	Not applicable	1	2.8		
	Total	5	13.9		
Total		36	100.0		



2022-2132 – Canadian Trucking Alliance – In-depth Interviews – STAT SHEET

		Frequency	Percent	Valid Percent	Cumulative Percent
Question -	20	1	2.8	2.9	2.9
About how	21	1	2.8	2.9	5.9
many trucks did	25	1	2.8	2.9	8.8
your company	35	1	2.8	2.9	11.8
operate in	38	1	2.8	2.9	14.7
2021?	40	1	2.8	2.9	17.6
	43	1	2.8	2.9	20.6
	45	1	2.8	2.9	23.5
	50	2	5.6	5.9	29.4
	70	1	2.8	2.9	32.4
	80	1	2.8	2.9	35.3
	85	1	2.8	2.9	38.2
	93	1	2.8	2.9	41.2
	100	3	8.3	8.8	50.0
	120	1	2.8	2.9	52.9
	125	1	2.8	2.9	55.9
	140	1	2.8	2.9	58.8
	230	1	2.8	2.9	61.8
	250	1	2.8	2.9	64.7
	260	1	2.8	2.9	67.6
	300	1	2.8	2.9	70.6
	340	1	2.8	2.9	73.5
	400	2	5.6	5.9	79.4
	570	1	2.8	2.9	82.4
	710	1	2.8	2.9	85.3
	1200	1	2.8	2.9	88.2
	1300	1	2.8	2.9	91.2
	2200	1	2.8	2.9	94.1
	4000	1	2.8	2.9	97.1
	26000	1	2.8	2.9	100.0
	Total	34	94.4	100.0	
Missing	Unsure	1	2.8		
	Not applicable	1	2.8		
	Total	2	5.6		
Total		36	100.0		

Nanos conducted live interviews of 36 senior executives of the trucking industry between April 13th and May 6th, 2022.

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		Frequency	Percent	Valid Percent	Cumulative Percent
Question - About how many full-time employees, including support staff, did your company have in 2021?	14	1	2.8	2.9	2.9
	38	1	2.8	2.9	5.9
	46	1	2.8	2.9	8.8
	50	1	2.8	2.9	11.8
	52	1	2.8	2.9	14.7
	55	1	2.8	2.9	17.6
	58	1	2.8	2.9	20.6
	60	1	2.8	2.9	23.5
	65	1	2.8	2.9	26.5
	80	1	2.8	2.9	29.4
	85	1	2.8	2.9	32.4
	100	1	2.8	2.9	35.3
	125	2	5.6	5.9	41.2
	140	1	2.8	2.9	44.1
	150	1	2.8	2.9	47.1
	175	1	2.8	2.9	50.0
	180	2	5.6	5.9	55.9
	200	1	2.8	2.9	58.8
	250	1	2.8	2.9	61.8
	390	1	2.8	2.9	64.7
	400	1	2.8	2.9	67.6
	450	1	2.8	2.9	70.6
	470	1	2.8	2.9	73.5
	515	1	2.8	2.9	76.5
	540	1	2.8	2.9	79.4
	550	1	2.8	2.9	82.4
	1350	1	2.8	2.9	85.3
	1400	1	2.8	2.9	88.2
	1500	1	2.8	2.9	91.2
	4400	1	2.8	2.9	94.1
	8000	1	2.8	2.9	97.1
	12000	1	2.8	2.9	100.0
Missing	Total	34	94.4	100.0	
	Unsure	1	2.8		
	Not applicable	1	2.8		
Total	Total	36	100.0		

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - About how many full-time employees, including support staff, did your company have in 2021?	0	6	16.7	18.8	18.8
	1	1	2.8	3.1	21.9
	2	3	8.3	9.4	31.3
	3	1	2.8	3.1	34.4
	4	2	5.6	6.3	40.6
	5	2	5.6	6.3	46.9
	10	2	5.6	6.3	53.1
	12	1	2.8	3.1	56.3
	15	1	2.8	3.1	59.4
	20	5	13.9	15.6	75.0
	25	1	2.8	3.1	78.1
	30	1	2.8	3.1	81.3
	50	2	5.6	6.3	87.5
	100	2	5.6	6.3	93.8
	200	1	2.8	3.1	96.9
	5000	1	2.8	3.1	100.0
Missing	Total	32	88.9	100.0	
	Unsure	3	8.3		
	Not applicable	1	2.8		
Total	Total	36	100.0		

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		Frequency	Percent	Valid Percent	Cumulative Percent
Question - About how many full-time drivers did your company have in 2021?	0	1	2.8	2.9	2.9
	20	1	2.8	2.9	5.9
	25	1	2.8	2.9	8.8
	35	1	2.8	2.9	11.8
	38	4	11.1	11.8	23.5
	40	1	2.8	2.9	26.5
	50	1	2.8	2.9	29.4
	60	1	2.8	2.9	32.4
	65	1	2.8	2.9	35.3
	70	1	2.8	2.9	38.2
	90	2	5.6	5.9	44.1
	100	2	5.6	5.9	50.0
	105	1	2.8	2.9	52.9
	125	1	2.8	2.9	55.9
	150	1	2.8	2.9	58.8
	170	1	2.8	2.9	61.8
	200	2	5.6	5.9	67.6
	215	1	2.8	2.9	70.6
	330	2	5.6	5.9	76.5
	400	1	2.8	2.9	79.4
	410	1	2.8	2.9	82.4
	700	1	2.8	2.9	85.3
	725	1	2.8	2.9	88.2
	1200	1	2.8	2.9	91.2
	1250	1	2.8	2.9	94.1
	3000	1	2.8	2.9	97.1
	4000	1	2.8	2.9	100.0
Missing	Total	34	94.4	100.0	
	Unsure	1	2.8		
	Not applicable	1	2.8		
	Total	2	5.6		
Total		36	100.0		

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - About how many part-time drivers did your company have in 2021?	0	12	33.3	35.3	35.3
	1	1	2.8	2.9	38.2
	2	2	5.6	5.9	44.1
	3	2	5.6	5.9	50.0
	5	4	11.1	11.8	61.8
	6	2	5.6	5.9	67.6
	7	1	2.8	2.9	70.6
	10	2	5.6	5.9	76.5
	12	2	5.6	5.9	82.4
	15	2	5.6	5.9	88.2
	75	1	2.8	2.9	91.2
	100	1	2.8	2.9	94.1
	200	1	2.8	2.9	97.1
	500	1	2.8	2.9	100.0
Missing	Total	34	94.4	100.0	
	Unsure	1	2.8		
	Not applicable	1	2.8		
	Total	2	5.6		
Total		36	100.0		