

(24) representatives of our Fleet Sentiment Focus Group

5600 total tractors and 13,000+ trailers represented by the group

Largest – 2000 Class 8 trucks and 8500 trailers in operation

Smallest – (1) truck and trailer combination (Owner/Operator)

Average fleet size (total medium and heavy-duty trucks and trailers) – 800 units in operation

Mixed vocations/duty cycles – primarily over the road

Average age of equipment: Trucks-4.5 years and Trailers-6.8 years

Subject of survey: How fleets make decisions to add technology or make other changes in their equipment

Survey was conducted electronically during May 2021; participants are fleet decision makers who are known and trusted by CK Commercial Vehicle Research

There were (3) primary inquiries: 1: Most important factors when considering making a change to your trucks and most important factors when considering making a change to your trailers. 2: What has been the best equipment change you have made in the past (5) years and what has been the primary benefit of that change. 3: Best advice you would give other fleet representatives regarding decisions to make equipment changes.

Summary of results:

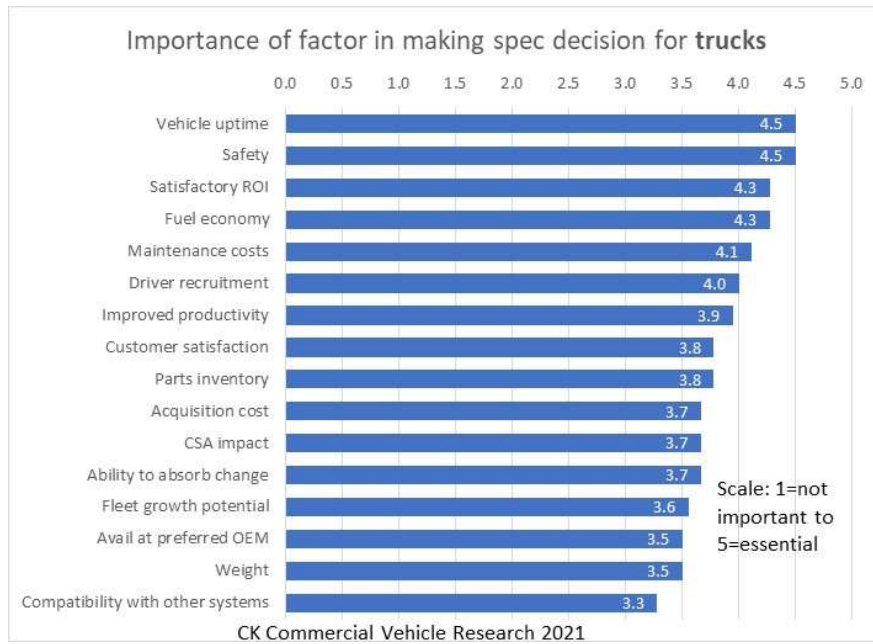
Most important factors when considering truck changes: Vehicle uptime, safety, satisfactory ROI, fuel economy, maintenance costs, and driver recruitment and satisfaction

Most important factors when considering trailer changes: Durability to last the life of the trailer (at fleet), safety, satisfactory ROI, driver satisfaction, increase trailer fleet productivity

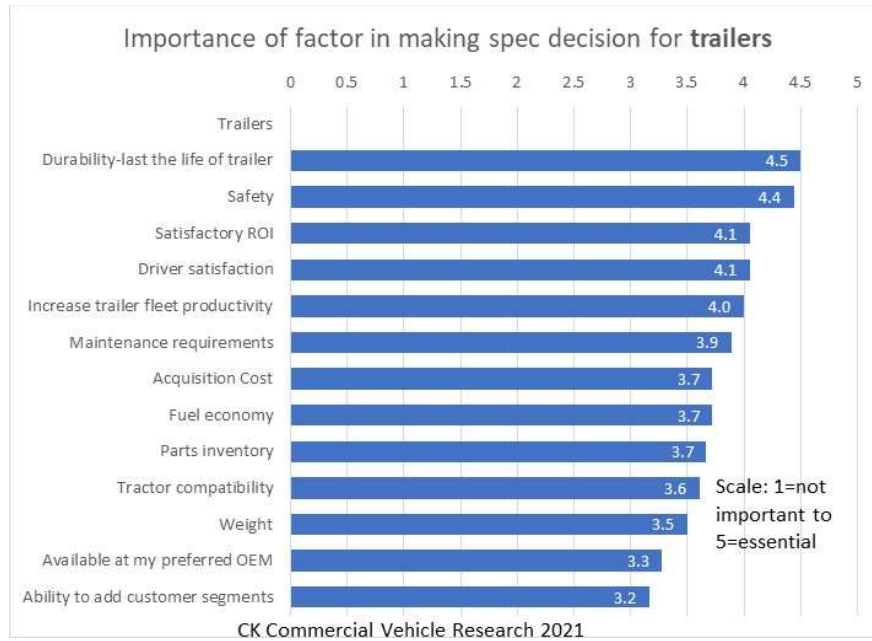
Best change that has been made on trucks: Disc brakes and collision mitigation or specifically Bendix Wingman

Best change made on trailers: Disc brakes and tire inflation/monitoring systems

Survey details follow:



Best Truck Change	Benefit
Automated transmissions	Less mechanical issues, opens driver pool to larger segments, improves fuel MPG, etc.
Battery APU	Fuel savings
Bendix Fusion	It annoys drivers but we have not had a rear-end collision since
Bendix Wingman system	Accidents down and driver habits are recorded
Collision Mitigation Sys, Event recorders (AKA cameras)	Disprove fraudulent accident claim
Disc brakes	Safety and cost per mile reduction
Disc brakes	Ease of maintenance and shorter stopping distance
Disc brakes	Less maintenance, better stopping
Disc brakes	Standardization of parts across equipment, reduced inventory reduced labor
Glider kits with Cat engines	Less downtime and maintenance costs
Larger sleeper	Driver retention
Moving to automated transmissions	Opened up driver recruitment
SCR emissions	Huge fuel economy increase
TPMS	Uptime on tires
Truck model	Increased room
Upgrade power plant	More power, better fuel economy, low noise
Went to some newer Peterbilt's	Safety and performance-fuel efficiency



Best Trailer Change	Benefit
Additional landing gear leg support brace	Extended the life of our landing gear legs and reduced damage. We are constantly dropping and hooking trailers
Aluminum components where possible	Trailers are lasting longer and we are seeing less corrosion
Aluminum wheels	Weight
Automated lift axle	Improved fuel economy, tire and brake life; increased tire life from 40,000 to 100,000 miles
Disc Brakes	Couple with RSD on trucks, allows for an even safer combination vehicle out on the roadways
Disc brakes	Safety and cost per mile
Disc brakes	DOT can't get in there to pick on you for cracked brake shoes
Disc brakes	Standardization of parts across equipment, reduced inventory reduced labor
Fuel efficient tires	Less fuel costs
Lowboy	Hydraulic gooseneck
New trailers	Lighter weight and less maintenance
Samsara	Tracking of assets and temperature monitoring of tankers
Tire inflation systems	Inflation systems improve on often-missed procedure of checking the tire pressure
TPMS	Reduces the number of tire failures on the road
TPMS	Increased tire life, fuel savings
Trailer Tracking	
Wheel size	Better wear

Best Advice When Making Equipment Changes

No two fleets are alike - there are similarities but you need to test/confirm what works best in your application

Consult with your drivers and get feedback on features they would like to have on the new units they will drive

Benefit versus cost=value

Make fast decisions and learn if you make a wrong one

Weigh out all pros and cons

We always try to test a few units before we go all in. Some technology that you think is great ends up not panning out and visa/versa

We always consult our most senior drivers on what changes they would like to see in our equipment. That way they feel their thoughts are important and feel part of the team

When a sales person comes calling have them help you track their product offering. We are all too busy to run trials but with the help of the vendor it becomes easier task to manage. Just don't let the vendor skew your data

Does it work for your fleet and your conditions? If it works for us, we do it, it's very simple

Disc brakes - they last, they're lightweight, DOT can't pick fights over cracked brake shoes, they stop faster, they don't fade, they cool faster...way better product all the way around

Sometimes the ROI is not easy to calculate as you are are dealing with facts and figures that are potential losses and not actual.

Gather the opinions of others before making a decision

Talk to other fleets that have done projects you are looking at for sure, specifically ones that have completed the projects for over a year to get long term feedback

Every fleet has specific pain points. Understand which products best resolve those issues with minimal or no impact on other operations. Test first in your environment to see if it works for you, then transition

Initial cost is not the biggest factor

If you have any questions regarding this material, please email chris@ckcvr.com

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