

Paving the way

Buyers of truck transportation cast more than 5,300 evaluations of LTL and TL service providers, the most for any of the modal categories and yet another record for our six-year survey. More than 40% are spending over a million dollars annually on truck transportation; 10% are spending \$10 million or more. (see chart on next page).

In recent years pricing and capacity have been key issues in truck transportation but as capacity has slackened so has pricing over the past 12 months, and certainly over 2007. With that has come a renewed emphasis from buyers of transportation services on service metrics. More than 80% of our respondents purchase LTL services and our research found that they place the highest priority on on-time performance and customer service, followed by competitive pricing.

LTL carriers score best when it comes to on-time performance, equipment and operations, competitive pricing and customer service. Overall, the buyers of transportation services evaluating their LTL service providers against expectations in such areas gave them scores of 4 out of 5 or better. However, the total satisfaction score for LTL carriers (derived by adding the average satisfaction ratings of each of the seven KPIs) is considerably lower than that given to TL carriers and only higher than that given to rail. It should be noted however, that respondent evaluations did result in a higher benchmark of excellence for LTL providers this year.

In all 14 LTL carriers surpassed the benchmark of excellence, 6 fewer than the previous year. Yellow Freight received an honorable mention.

The winners and their scores for each of the seven KPIs are shown in the table below. The bottom row of the table shows this mode's benchmark of excellence for each KPI. The total benchmark of excellence for this mode is shown top right.

The winners are shown in alphabetical order and only those scoring above the total benchmark of excellence are included.

LTL MOTOR CARRIER AWARD WINNERS

Total no. of shippers evaluating carriers this mode: 2104 Total carrier evaluations: 3143 Benchmark of excellence: 117.190

Carriers	On-time performance	Equipment and operations	Information technology	Competitive pricing	Customer service	Problem solving	Value-added services
ABF Freight System	18.908	16.837	16.552	18.900	19.994	17.028	12.982
Armbro Transport	21.517	17.163	14.717	19.327	20.248	17.684	12.579
Armour Transportation	19.414	17.368	14.678	18.073	19.518	16.581	13.118
Con-way	21.073	17.623	17.069	17.710	18.995	16.428	13.070
Hercules	21.484	17.995	16.552	20.204	21.155	18.514	14.117
McArthur Express	21.787	19.374	17.186	18.376	21.650	19.250	15.242
Manitoulin Transport	21.026	17.660	16.431	18.321	19.717	17.054	13.098
MSM Transportation	21.782	18.563	16.419	18.973	21.599	19.399	14.984
National Fast Freight	18.728	16.716	15.656	19.791	19.208	16.143	12.796
Roadway	19.551	16.904	16.188	17.503	18.704	16.419	11.966
Robert Transport	19.740	18.354	15.969	18.105	20.036	18.535	13.870
Thibodeau Transport	20.629	17.477	16.368	19.212	19.758	17.415	12.871
Totalline Transport	20.879	17.761	13.045	15.312	19.652	16.317	14.473
USF Holland	20.709	17.711	15.460	19.033	18.496	14.900	11.743
Yellow Freight (HM)	18.908	16.929	16.803	18.027	18.145	15.662	12.579
Benchmark of Excellence	19.584	16.958	14.807	18.472	18.681	15.994	12.694