

Retaining top drivers keeps your business thriving

DRIVERWAGES.COM



Meet Leah Shaver

- » As President and CEO of NTI, I help motor carriers and private fleets use wage and compensation data to benchmark and drive recruiting and retention goals.
- » With 25 years in trucking, I've focused on creating programs that attract and retain well-compensated, engaged drivers and technicians.
- » I stay connected with the industry through speaking events, media, webinars, and as a host on SiriusXM's Road Dog Trucking Radio.
- » I served three terms on the Women In Trucking Board of Directors and now serve on the Next Generation in Trucking Board of Directors. Before joining NTI in 2015, I spent 14 years leading HR and driver recruiting at a multi-platform truckload carrier.



Leah Shaver
President & CEO



Driver Supply Data and Discussion

Driver Supply and Demand: A Turbulent Balancing Act

Structural trends shape our workforce. Experienced drivers will become harder to access.

Workforce Reality: What's Happening In For-Hire trucking

Look at the trends shaping for-hire trucking and driver development.

Pay Trends Location- Based Dynamics

The market is challenging, competitive, and expensive. Analyzing how jobs, hiring, and pay decisions diverge.

Strategies to Win Trucking's Perpetual Talent Tug-of-War

The supply funnel forces fleets to rethink how they attract, recruit, and retain professional drivers.

Drivers: Your Most Valuable Asset

Driver supply will remain strained in the short term. Seize the opportunities ahead by ensuring your seats stay filled.

We Analyze the Full Picture



NTI TRACKS & REPORTS

Our Data Solutions

NTI's Solutions Turn Complex Data Into Actionable Insights



Nearly 200 Attributes of
Driver Compensation



Benefits, Retirements, PTO,
Bonuses, and Incentives



Mileage, Hourly, and Total Annual
Earnings at For-hire Fleets



Owner-operator Income and
Comp Perks



Private and Dedicated Fleet
Comp and Activity Pay



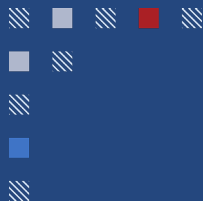
Neutral Reading of Wage
Momentum for Contracts



Market-level Earnings for Location-
based Hiring



Location-centric Earnings
and Benefits for Techs



READY, SET.... LET'S GO!

The Cycle Has Turned

A supply driven rebound has begun a race among fleets to hire drivers

Exiting capacity and freight demand

Driver supply has put pressure on large fleets to hire and avoid a capacity crunch. A drained pipeline combined with capacity exits increases competition for safe, experienced drivers and challenging hiring conditions ahead.

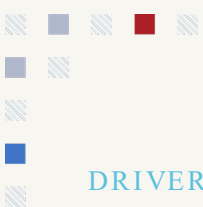
Opportunity knocks, for you... Or them

The industry's lack of planning for tomorrow's needs is very expensive. A plan to simply react to what happens tomorrow is going to cost significantly more than building solutions for long-term staffing success through peak season.

Carriers with filled seats say yes to every opportunity

Getting serious about staffing will reap rewards sooner, rather than later.

Every commitment you consider – new lanes, contracts, volume during peak season – all requires a safe driver behind the wheel.



DRIVER SUPPLY & DEMAND

The intense hiring demand for drivers softened in 2025, but... critical driver supply constraints persist

Deep-rooted, entrenched, long-term shifts in the labor market and driver availability have persisted and will worsen with new cycle pressures.

From age and health factors, regulatory constraints, and a lack of focus on building a pipeline of the next generation of professional drivers, the current freight environment has only masked the industry's underlying need to find solutions

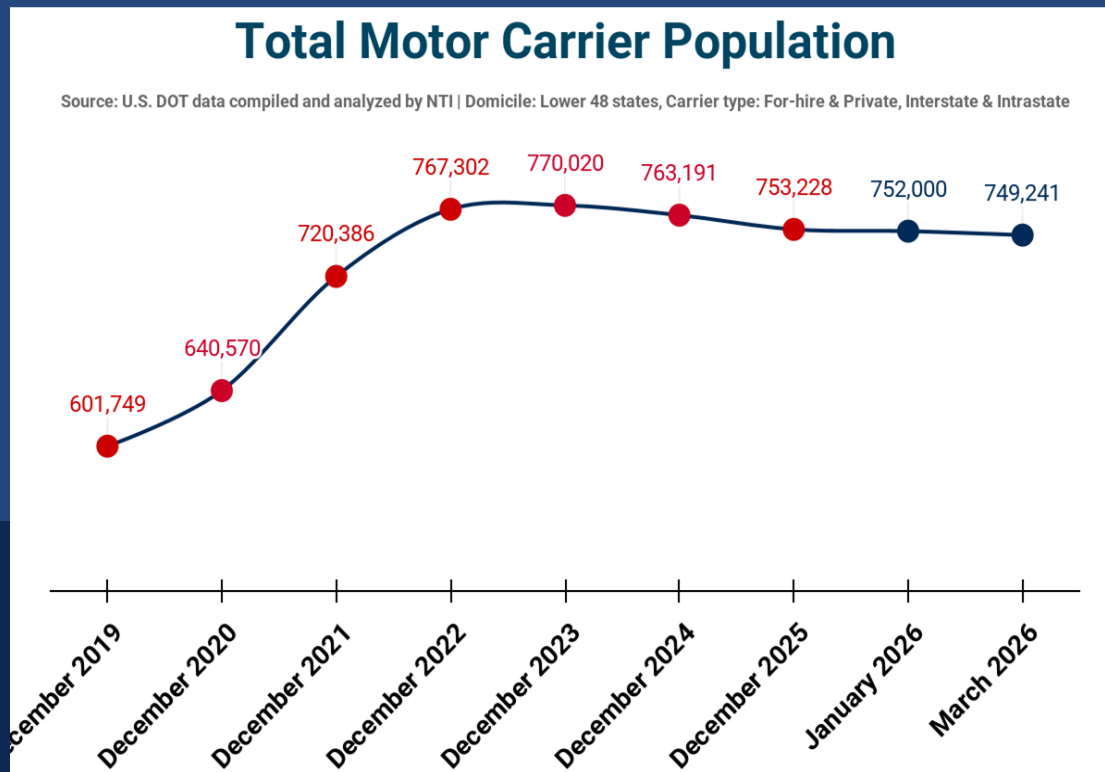


Capacity Update

The pool is shrinking

NTI CAPACITY UPDATE

After rapid growth in '21 and '22, carrier count has been slowly falling

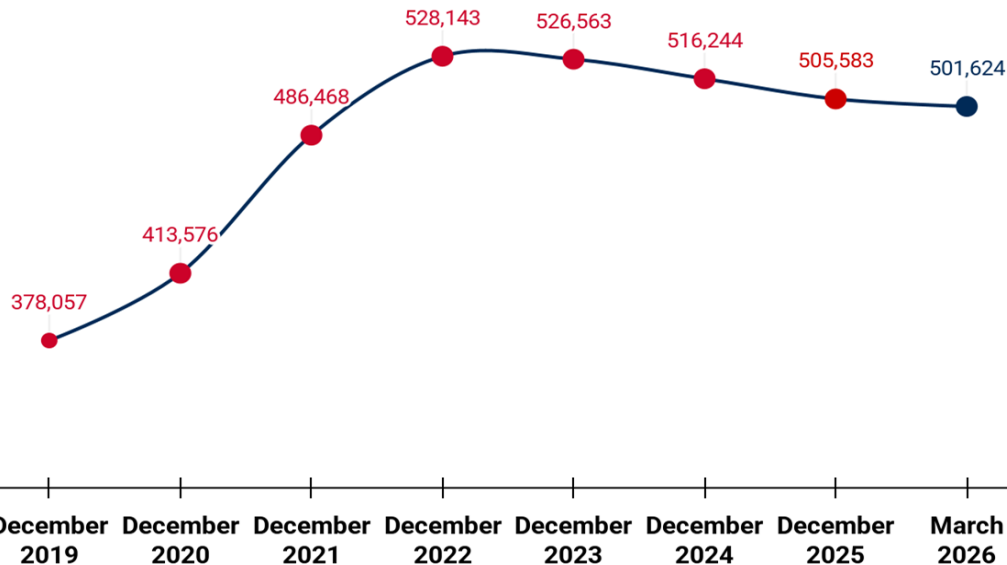


NTI CAPACITY UPDATE

Losses in carrier population are concentrated in for-hire segment

For-Hire Carrier Population

Source: U.S. DOT data compiled and analyzed by NTI | Domicile: Lower 48 states, Carrier type: For-hire, Interstate & Intrastate



*For-hire
population is
down 5.1% from
2022's peak.*

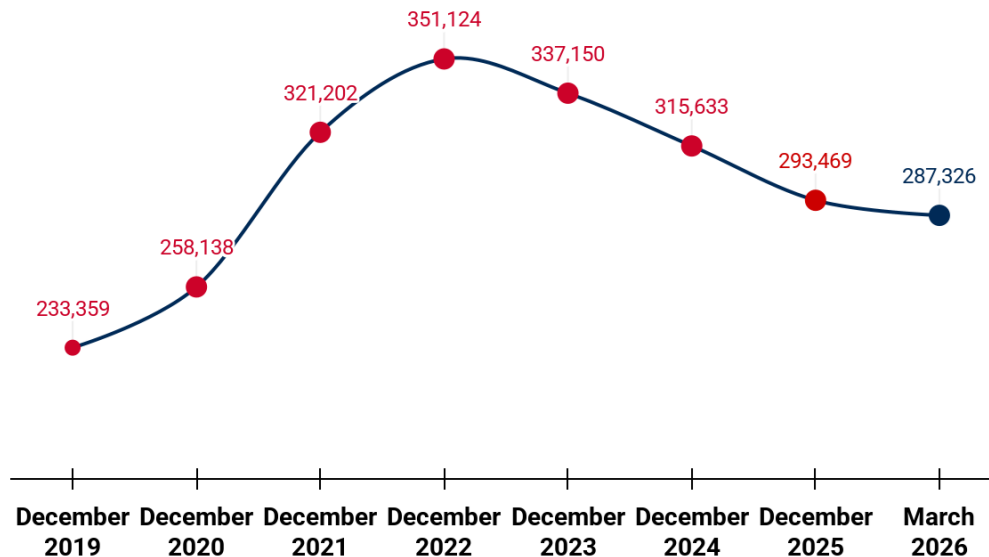
NTI CAPACITY UPDATE

...Particularly in the for-hire interstate carrier market

For-hire interstate carrier count has fallen 18% since 2022's peak.

For-Hire Interstate Carrier Population

Source: U.S. DOT data compiled and analyzed by NTI | Domicile: Lower 48 states, Carrier type: For-hire, Interstate

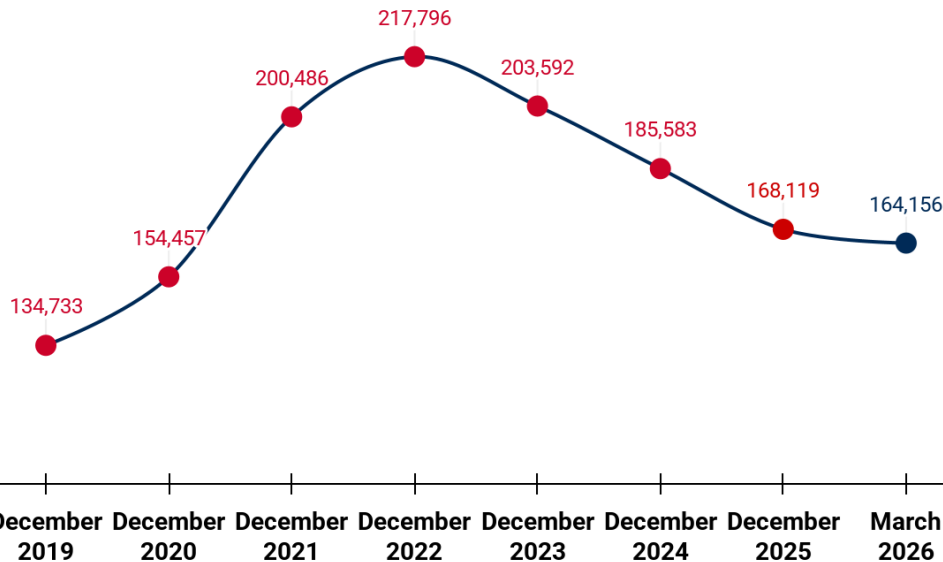


NTI CAPACITY UPDATE

...And especially among the smallest carriers

1-Truck For-Hire Carrier Population

Source: U.S. DOT data compiled and analyzed by NTI | Domicile: Lower 48 states, Carrier type: For-hire, Interstate



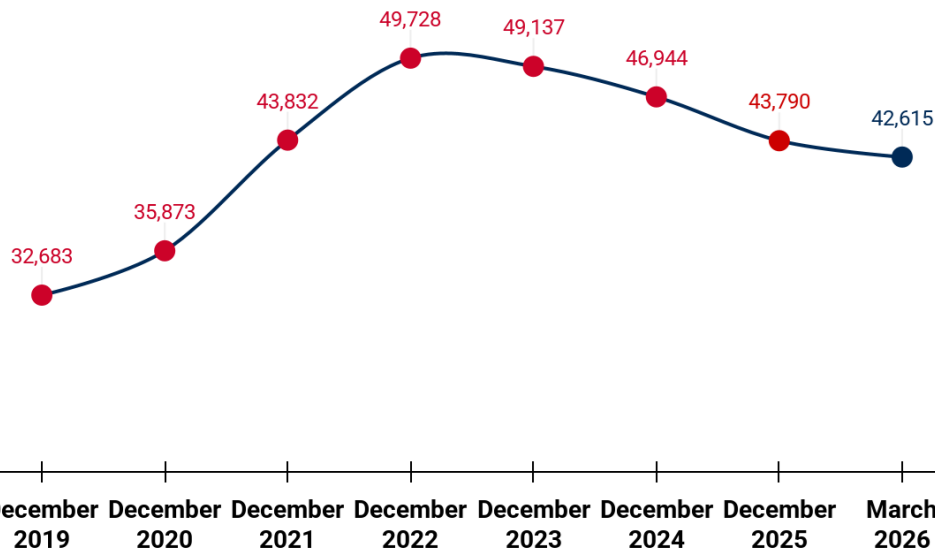
1-truck for-hire interstate count has tumbled 25% from 2022's peak, after climbing 61%.

NTI CAPACITY UPDATE

...And especially among the smallest carriers

2-Truck For-Hire Carrier Population

Source: U.S. DOT data compiled and analyzed by NTI | Domicile: Lower 48 states, Carrier type: For-hire, Interstate



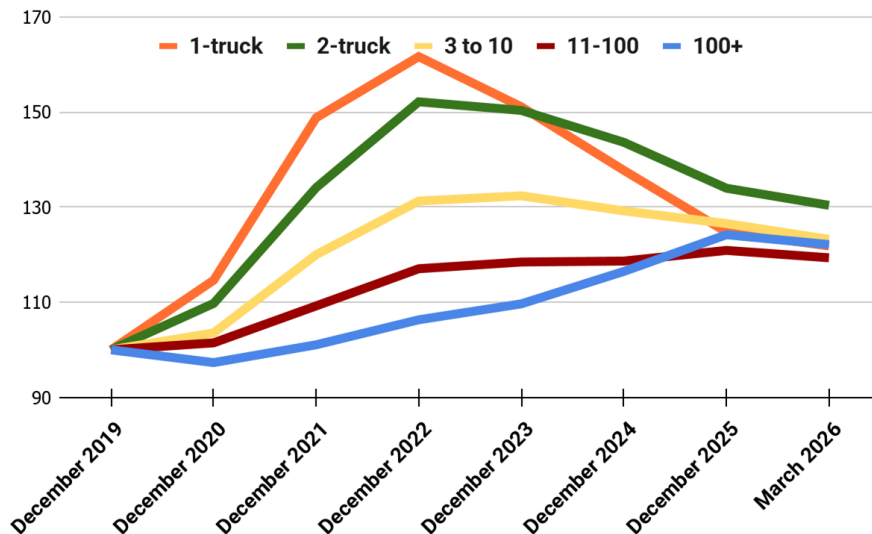
2-truck for-hire interstate carrier numbers have fallen 15.4% from 2022 after climbing 52%.

NTI CAPACITY UPDATE

While smaller carriers boomed then exited, other
fleet cohorts have seen more stability

Carrier population changes acted on a gradient based on fleet size

Source: U.S. DOT data compiled and analyzed by NTI | Index-based YOY change using Dec. 2019 as a baseline

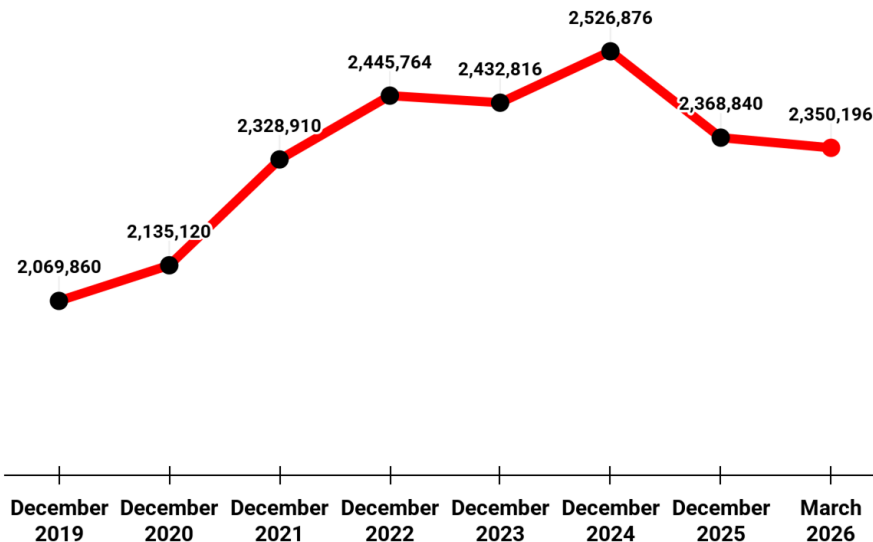


NTI CAPACITY UPDATE

For-hire driver count fell over 5% in 2025 and already over 1% in 2026

For-hire interstate driver population tumbled in 2025

Source: U.S. DOT data compiled and analyzed by NTI

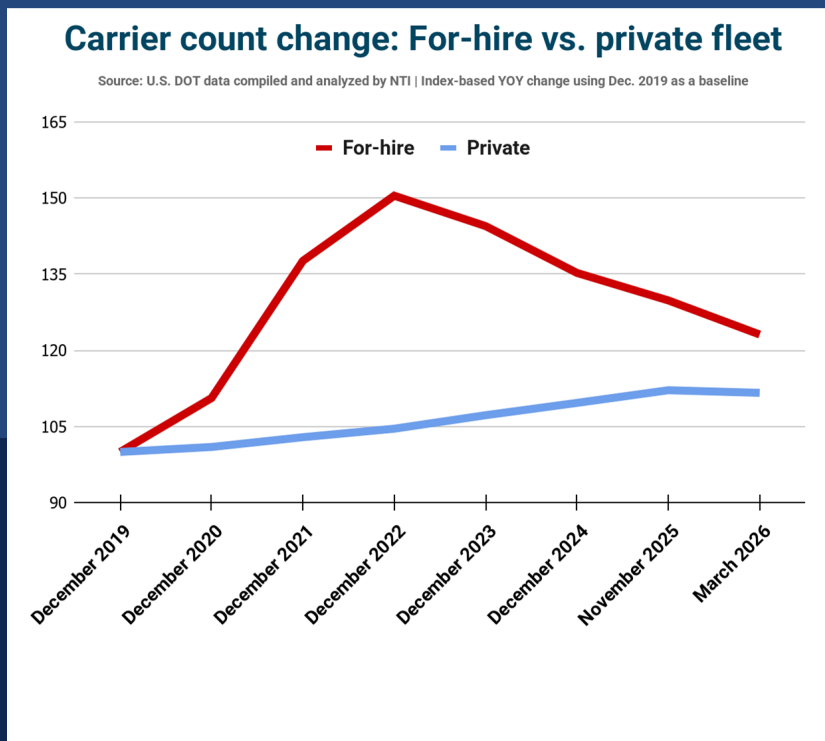


NTI CAPACITY UPDATE

For-hire carriers rode the market wave, while private fleets emphasized steady growth

Private fleet carrier population has grown ~2% per year from 2019, climbing 12% in that time frame.

For-hire carrier #s ballooned by 50% but have now fallen over 18% since 2022.



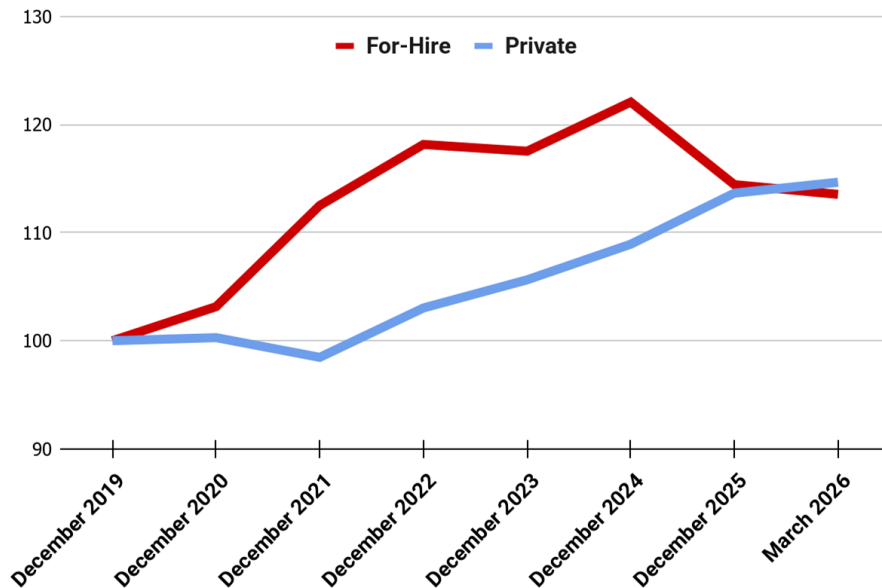
NTI CAPACITY UPDATE

For-hire driver numbers regressing while private fleet count grows

For-hire driver count grew 15% from 2019, but fell over 5% in 2025. Private fleet driver count has grown over 14% since 2019.

Driver count change: For-hire vs. private fleet

Source: U.S. DOT data compiled and analyzed by NTI | Index-based YOY change using Dec. 2019 as a baseline



Driver Supply Constraints

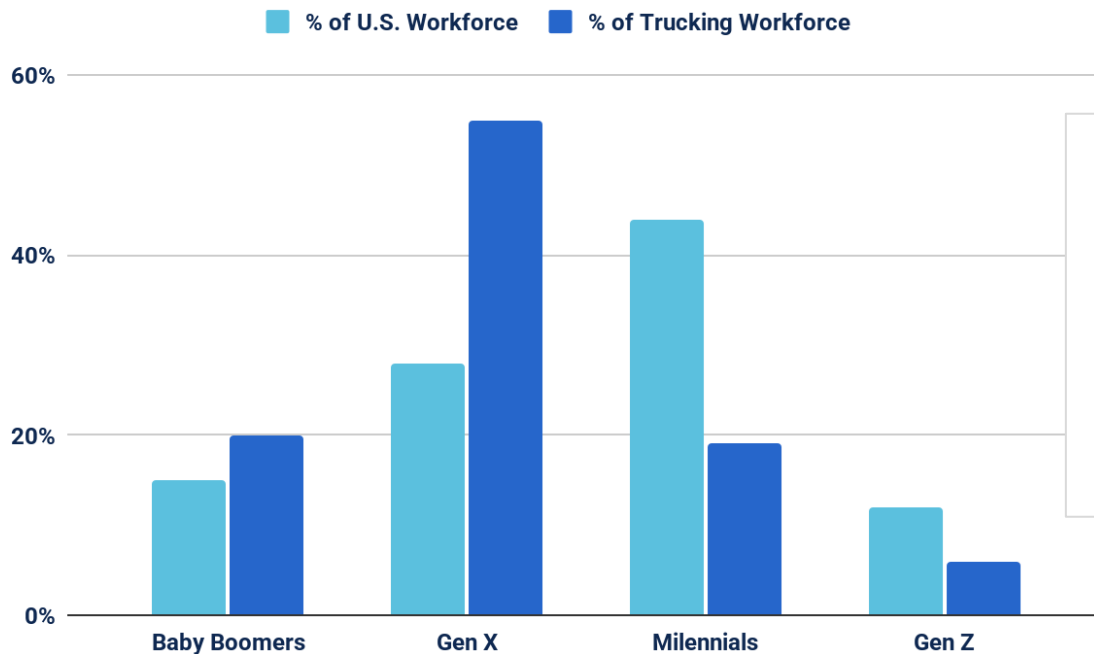
Replacements are not coming and here is why

DRIVER SHORTAGE: MYTH OR REALITY

“While drivers are retiring, there
is no evidence of a workforce
issue.”

DRIVER SUPPLY

Trucking's workforce is aging and interest among younger generations hasn't taken hold



% of U.S. Workforce
Source: Age Data from U.S. Bureau of Labor Statistics compiled by NTI

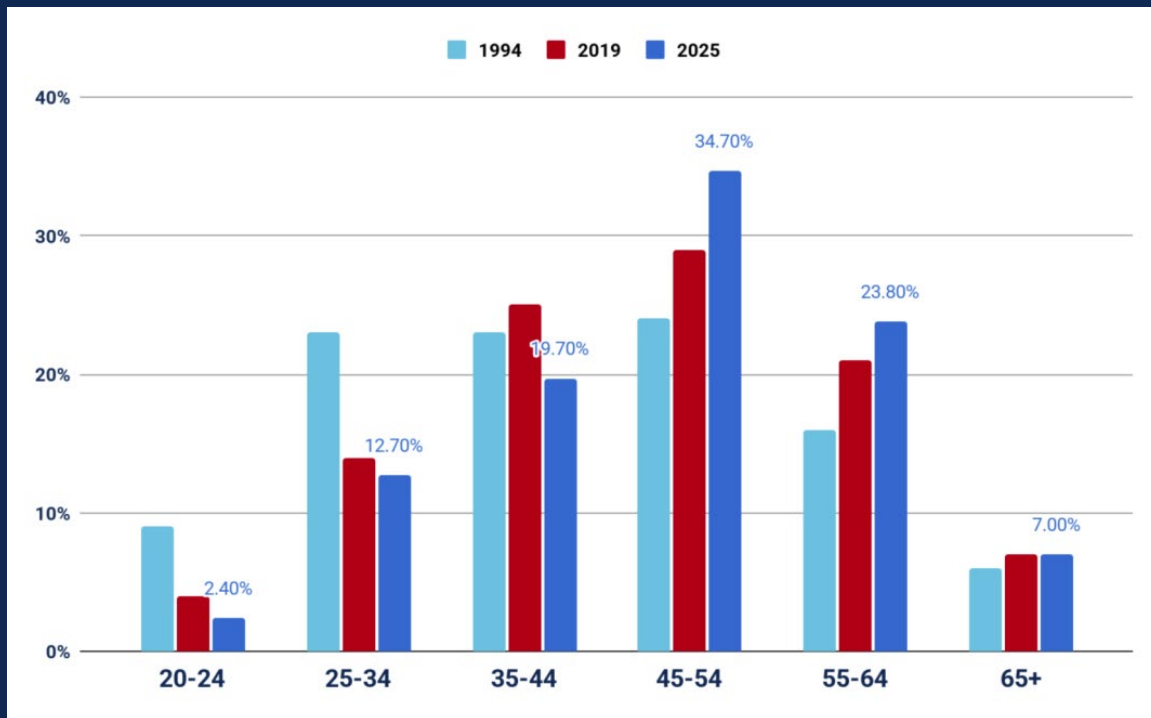
% of Trucking Workforce
Source: NTI

DRIVER SUPPLY

In fact, we lose younger drivers faster than retirement,
despite the age distribution and workforce population

*Distribution of
Driver Population
By Age Group*

*Source: NTI Surveys of
Motor Carriers & Private
Fleets*

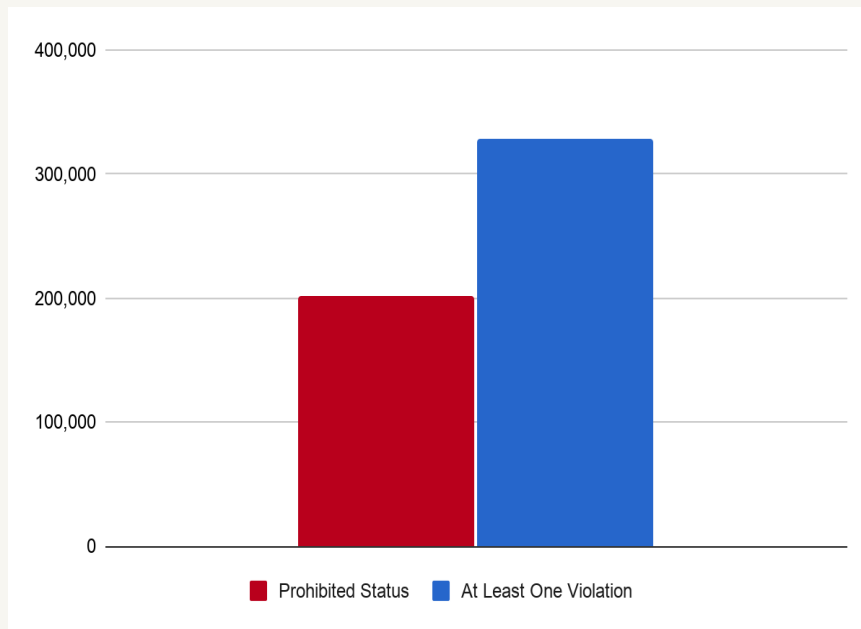


DRIVER SUPPLY

Drug and Alcohol Clearinghouse Impact

Drug & Alcohol Clearinghouse, while necessary,
has sidelined over 200,000 drivers

- 75% haven't started return-to-duty protocol, and many have had their CDLs revoked
- Even if reinstated, most fleets wouldn't hire them
- Industry loses ~5,000 drivers monthly, and they're not coming back



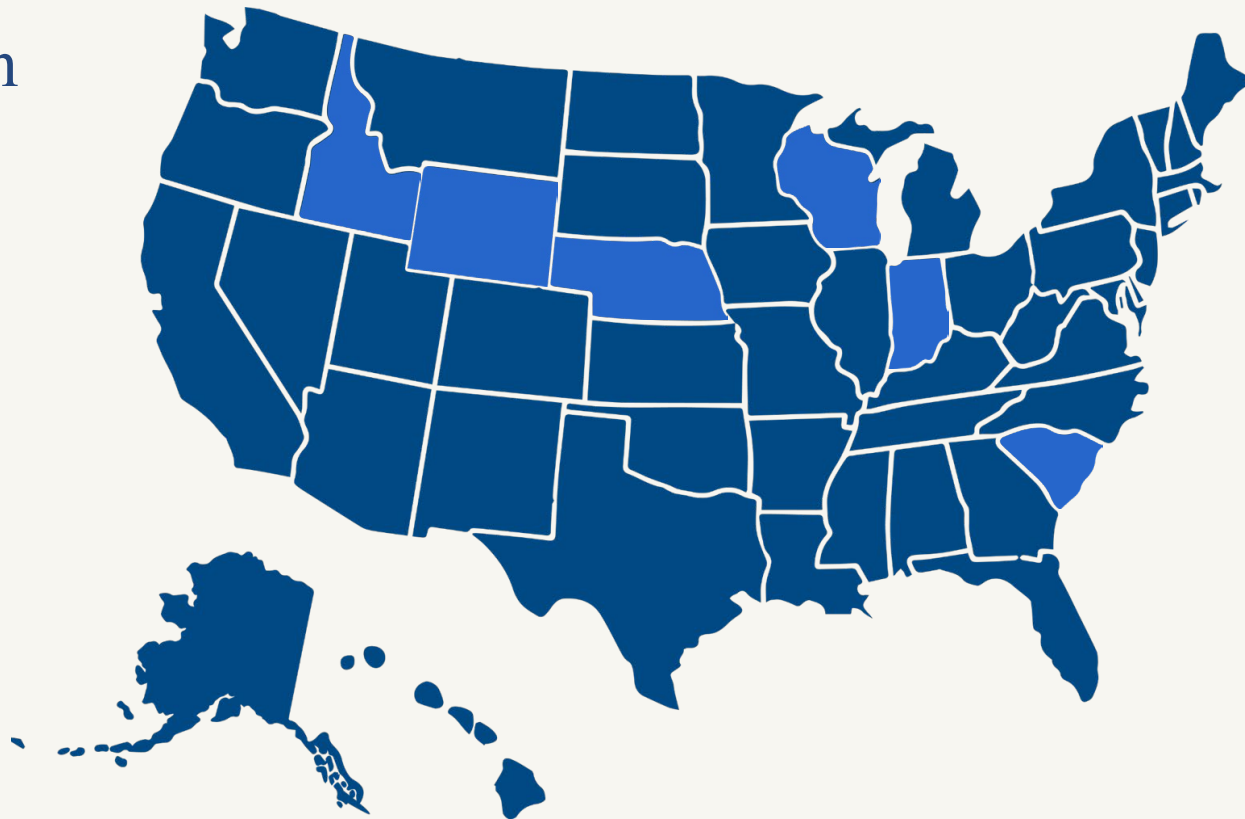
Clearing House Effects since January 2020

DRIVER SUPPLY

Will People Even Consider a Regulated Job Where Drug Testing is Mandatory?

Cannabis Legalization by State

 No Program for Legal THC
 Completely or Partially Legal





DRIVER SUPPLY

DOT's Crackdown on Non-Domiciled CDLs Creates a Cascading Effect

DOT estimated nearly 200,000 drivers will lose their CDLs within next two years.

In 18 Months

- >28,000 ELP Violations
- >30,000 Cancelled Licenses
- >8,000 Schools Disqualified

The issues of non-domiciled CDLs and English Language Proficiency collide with the other perpetual driver supply constraints chipping away at the industry's workforce

DRIVER SUPPLY

English Language Proficiency could echo Clearinghouse effects

Out-of-service orders steady as enforcers
focus in on updated DOT enforcement policy

- ~ More than 28,000 placed OOS so far
- In addition to enforcement protocol, ELP regs will deter new entrants and will prompt increased carrier vetting
- While regulation is necessary, it will have an overall impact on the driver pool, causing more competition for **QUALIFIED** safe drivers



Source: Trucksafe

DRIVER SUPPLY

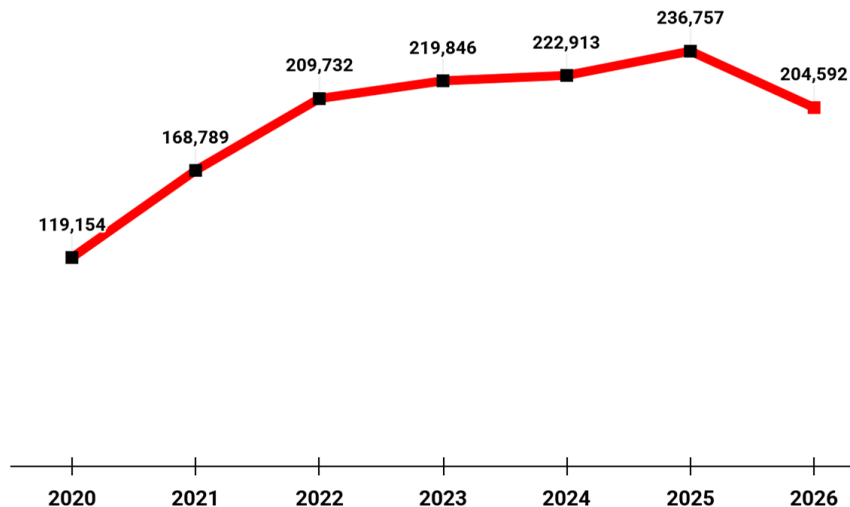
“It is harder to find qualified
drivers now than in my entire
28-year career.”

DRIVER SUPPLY

Hiring activity climbed steadily in 2025 despite market concerns

Driver hiring activity elevated further in 2025

Average monthly pre-employment queries | Source: U.S. DOT data compiled and analyzed by NTI



*Note the *dramatic* drop in hiring beginning in 2026. Most fleets complain about quality and closing the sale.*

DRIVER SHORTAGE: MYTHORREALITY

“Trucking jobs pay better than
other industrial worker roles.
That makes the sacrifices
worthwhile.”

DRIVER SUPPLY

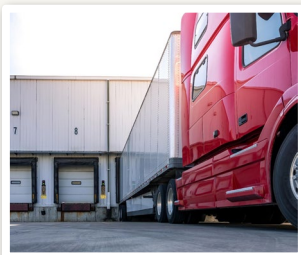
Competing Industries Increase Pressure on Driver Supply

TRUCKING

Pay Growth Since 2020:

21.18%

Source: NTI's National Wage Index



CONSTRUCTION

Base Pay: \$39.33

Growth Since 2020:

25.5%

Source: U.S. BLS



MANUFACTURING

Base Pay: \$35.17

Growth Since 2020:

22.8%

Source: U.S. BLS



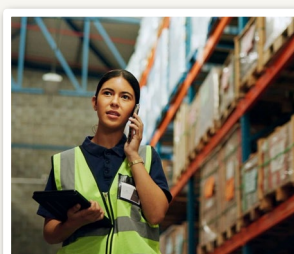
WAREHOUSING

Base Pay: \$26.78

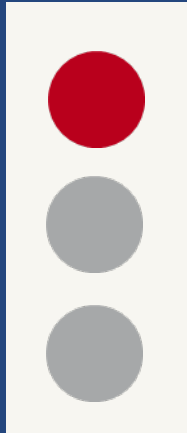
Growth Since 2020:

19%

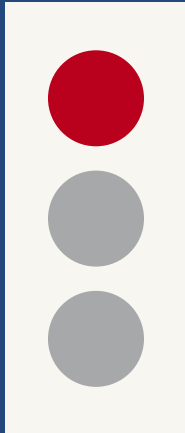
Source: U.S. BLS



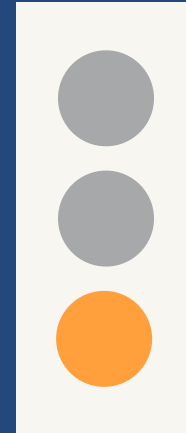
Factors That Influence Driver Pay Movement



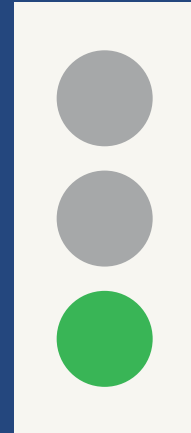
Driver
Turnover



Driver
Supply



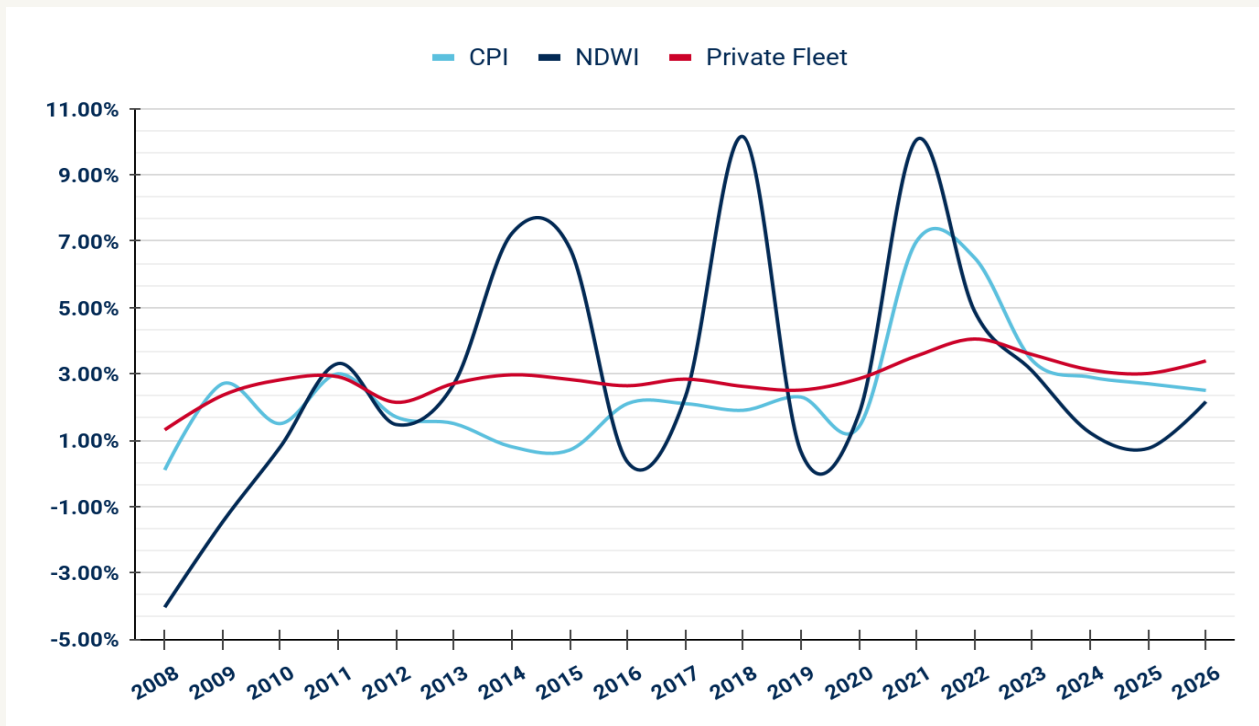
Freight
Rates



Capacity
Demand

MARKET ANALYSIS

Driver Wages' Rollercoaster vs. Private Fleet Pay Momentum vs. Inflation



CPI

Source: BLS

**National Driver
Wage Index**

Source: NTI

Private Fleet Wages

Source: NTI

Waves of Perpetual Constraints Push Driver Supply to a Looming Chokepoint

Slack Pipeline

Paused training programs and fewer CDL partnerships are weakening the future driver pipeline. CDL Schools are also subject to rampant enforcement, leading to fewer quick-turn options for new entrants.

Supply Impact
≈ **Thousands**
of Drivers/mo

Churns and Exits

Driver churn remains high, with many new drivers leaving within their first year.

Supply Impact
≈ **Thousands**
of Drivers/mo

Drug/Alcohol Clearinghouse

Over 200,000 drivers have been removed from the driver pool.

Supply Impact
≈ **5,000**
of Drivers/mo

Age and Health

An aging workforce and health-related exits continue shrinking driver supply.

Supply Impact
≈ **Thousands**
of Drivers/mo

Non-Domiciled CDL Changes

DOT audits could remove up to 200,000 non-domiciled CDL holders from the market.

Supply Impact
≈ **8,000**
of Drivers/mo

ELP Enforcement

ELP enforcement and rising out-of-service orders continue tightening capacity.

Supply Impact
≈ **2,000+**
of Drivers/mo



WINNING THE HIRE

Where do your fleet's drivers come from, anyway?

Mostly, the for-hire fleet carrier population, who invests their time and resources into hiring drivers with little to no experience and builds a pipeline of safe, qualified drivers that go on to private and dedicated fleet jobs.

DRIVER HIRING FUNNEL

Driver shortage emphasized after 2-year mark

Inexperienced applicants outnumber experienced drivers 3 to 1.

Once minimally trained, they seek jobs or are hunted at 3, 6, and 9 months

1 year of safe driving (now considered experienced)

2 years of driving experience (*a prevalent minimum*)

3 years of experience, safe background, and/or flatbed

Trainer

Highest Labor

Hazmat Certified/Tanker

Teams

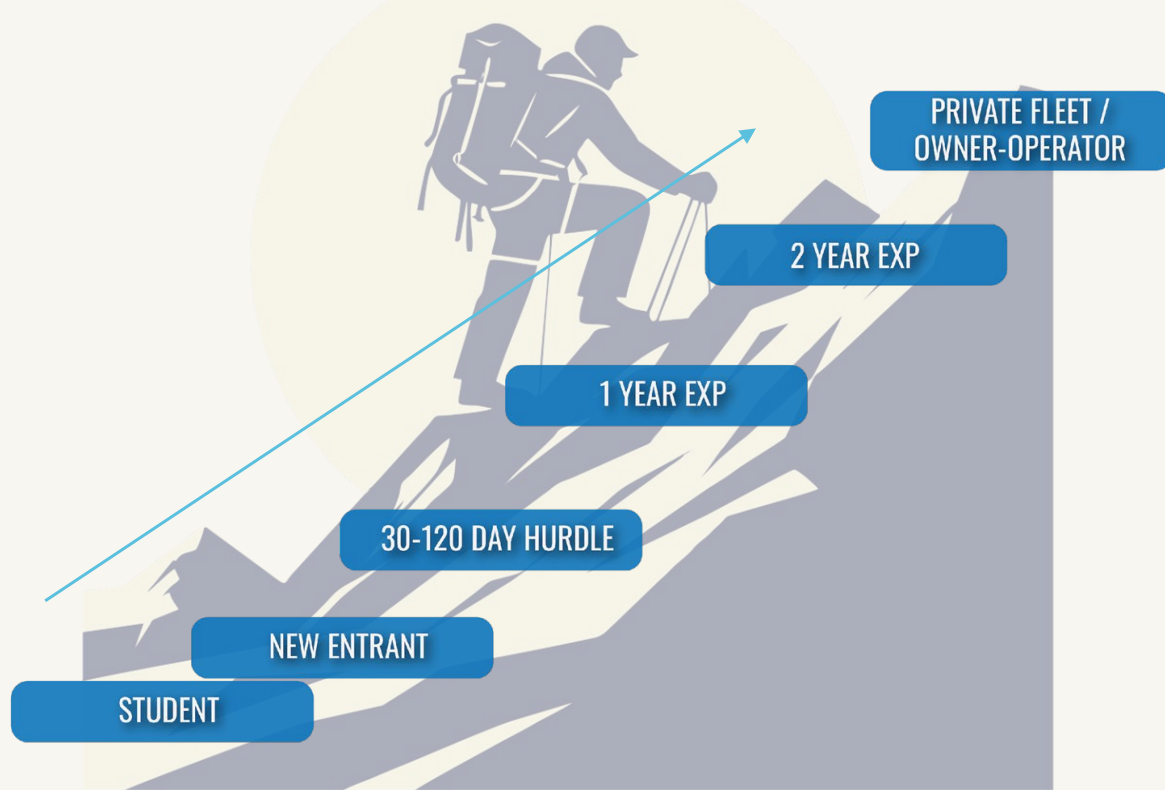
Many, if not most, motor carriers and private fleets will only accept a driver with two years or more of experience, meaning that hiring competition is especially fierce at this narrower point of the driver hiring funnel.

DRIVER SHORTAGE: MYTH OR REALITY

“Trucking isn’t just a job.
It’s a lifestyle and not everyone
is prepared for that change.”

THE JOURNEY TO YOUR FLEET CAN BE TAXING

AND IT CAN BE LINED WITH DISILLUSIONMENT,
DISENGAGEMENT, AND DISSATISFACTION

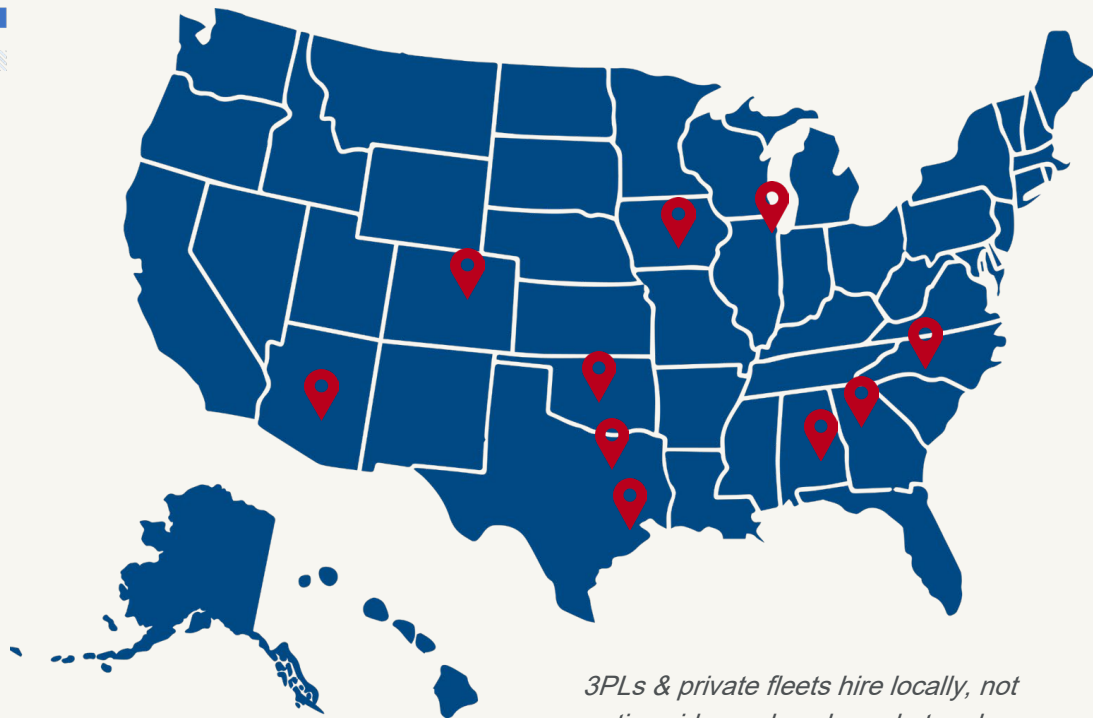


DRIVER SHORTAGE: MYTH OR REALITY

“The shortages are market driven.
Why else are some of my locations
IMPOSSIBLE to recruit and retain?!”

10 Most Frequently Benchmarked Locations by Fleets in 2025

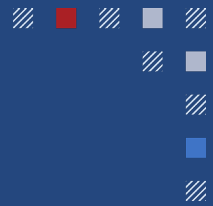
- Denver, CO
- Des Moines, IA
- Dallas, TX
- Phoenix, AZ
- Houston, TX
- Montgomery, AL
- Atlanta, GA
- Cincinnati, OH
- Chicago, IL
- Richmond, VA



3PLs & private fleets hire locally, not nationwide—and each market and job type has unique supply and demand dynamics.

Winning the Hire

Working your advantages in recruiting



WINNING THE HIRE

Lean Into Your Competitive Advantage

Large Fleets Don't Operate Like You Do

They spend 85% of their driver investment on finding new people and 15% on keeping them.

Large Fleets Recruit Differently

Large fleets have marketing budgets, recruiting teams, and fast hiring processes. Driver churn is accepted as a norm and has been for decades.

You Aren't a Large Fleet, and You Don't Need To Be

Let your size work in your favor. Drivers seeking a personal touch, direct communication and individualized experiences are seeking companies like yours!

DRIVER SHORTAGE: MYTHORREALITY

“Young people don’t want to
work, communicate or get off
their phone long enough to learn
the job well”

WINNING THE HIRE

Reaching Across Four Generations

Interest and communication varies by generation, and we have to meet their needs to be appealing

1947-1964

BABY BOOMERS

Value conversation, recognition, experience-based pay, and personal connection.

1965-1980

GENERATION X

Value networking, collaboration, mentorship, achievement, and opportunity.

1981-1996

MILLENNIALS

Seek career growth, recognition, advancement, and flexible communication.

1997-2012

GENERATION Z

Prefer tech-driven communication, value independence, financial stability, and clear career paths.



WINNING THE HIRE

Communicating Pay Effectively

Executing Meaningful Outcomes for Drivers during Day 1 - 120

REALISTIC PROSPECTS

UNDERSTAND YOUR EARNINGS

Create a table of realistic and tight pay ranges for driver applicants of all experience levels

BE UP FRONT

COMMUNICATION IS KEY

Drivers should well understand in first conversation what they can expect to earn while working for you

WEEKLY EARNINGS

LEAVE NO ROOM FOR MISUNDERSTANDING

Consider messaging pay in terms of weekly earnings and how drivers understand pay to leave less room for extrapolation

AUDIT OFTEN

VERIFY OUTCOMES

Ensure your pay ranges align with what drivers actually earn. Perform an audit of early-tenure driver pay to confirm

DRIVER SHORTAGE: MYTH OR REALITY

“Gen Z and Millennials are heavily purpose-driven, with 9 in 10 reporting a sense of purpose being crucial for job satisfaction.”

Build your pipeline

Recruiting begins in your backyard.

We can shape drivers' experience for the better, tap into a workforce that's already committed to us and looking for opportunities, and bake in long-term retention by engaging with those who already work for us and those within our communities.



Get Active in Your Community

Partner with community colleges and high schools, offer free training for family, or host touch-a-truck programs. How can we actively reach, engage with, and promote trucking as a first-choice career for younger people?



Build X-to-Driver Programs

Dock-to-driver and similar programs help fleets develop younger talent, build career pathways, and create stronger long-term retention. Build driver roles not as a last resort, but as a career destination within the company.

1 Differentiate Your Recruiting Experience

- Use authentic marketing and real driver stories >>>>>>>>
>>>>>>>>Recognize this guy?
- Make drivers feel valued from first contact to onboarding
- Use your own excitement and people to promote you on social, rather than stock images and vendor created content



2 Equip Recruiters for Success

- Turn recruiters into subject matter experts
- Keep them informed of changes and opportunities
- Expand and diversify lead sources



3 Deliver a First-Class Onboarding Experience

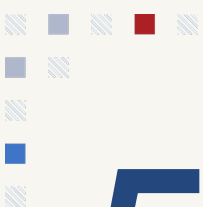
- Create a strong first Impression
- Reduce onboarding friction and recruiting drop-off



4 Build a Driver-Centered Culture

- Make drivers feel heard and respected
- Promote pay, incentives, and referral opportunities





5 Address Driver Pain Points with Empathy

- Improve quality of life on the road
- Support work-life balance and daily experience



Retaining Drivers at Any Size

How to get them to stay >120 days.

DRIVER SHORTAGE: MYTH OR REALITY

“Irregularity of available loads
lead to drivers earning
inconsistent pay, coupled with
working conditions that are
stressful contributes to high
driver turnover.”

RETENTION AT ANY SIZE

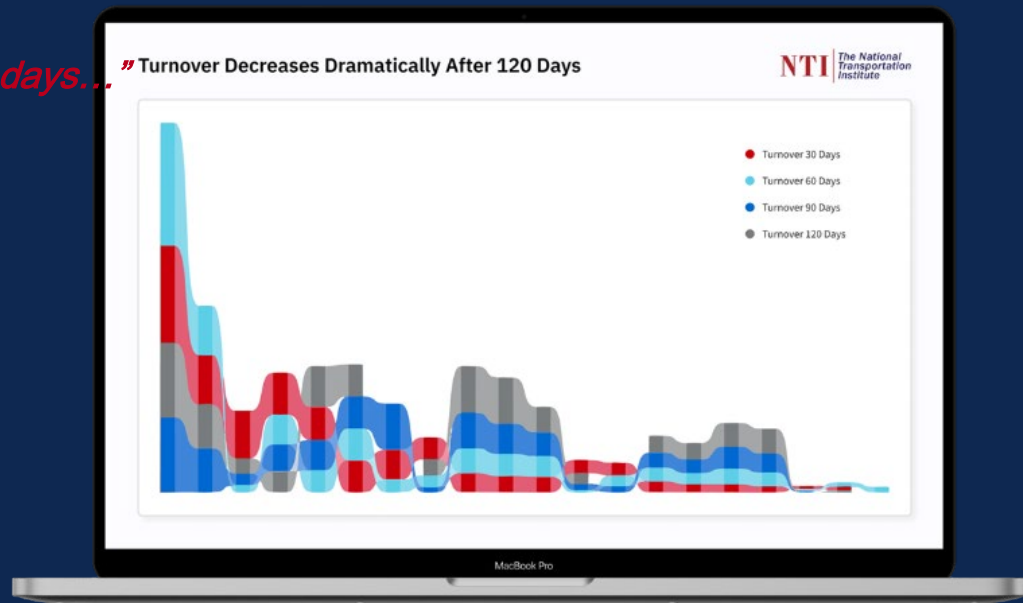
What We Hear

"If I could only keep my drivers 30, 60, 90, 120 days..."

Qualified drivers you hire bring a mindset that has been polluted by previous work experience. We must work to undo that conditioning.

Many drivers not only cycle out of the industry within the first six months, but they also cycle out of your jobs within that time-frame too, and for a variety of reasons.

From pre-hire to retire, make your drivers' experience meaningful at every step





RETENTION AT ANY SIZE

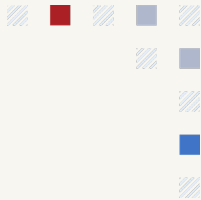
Strategies to Break Through the Early Turnover Cycle

Common themes we address with fleets of all sizes

Review seniority-based bidding systems that leave newer drivers with less desirable routes, schedules, and pay — and instead incentivize senior drivers to cover tougher shifts.

Check-in early and often with new hires to quickly address issues with equipment, pay, scheduling, or onboarding.

Prioritize building connections.
If you wait for them to call you, they're already gone.



RETENTION AT ANY SIZE

Engage and Build Connections On What Matters

Never stop selling and re-selling your company's advantages

1

Use newsletters, blogs, and social media to connect with and celebrate your people

2

Let drivers share why they love working for you and promote referral opportunities

3

Always be recruiting – In actions, remind drivers why they chose you and why they should stay

4

Offer opportunities to learn the business and develop new skills, add endorsements, and train others

RETENTION AT ANY SIZE

Communicate Effectively And Meaningfully

At your size, personalized communication isn't just an option. It's necessary to build and maintain connections.

Lead with empathy and address problems to avoid conflict.

- Text applauding the week's wins
- Show up and be supportive when things go wrong
- Call to recognize milestones
- Ask what's wrong ... and listen
- Give your drivers a reason to be mobile ambassadors of the company, and you will grow



RETENTION AT ANY SIZE

Give Drivers A Reason to Stay

Drivers get sticky when they can see that every day, week, and month is building to a better one. Don't leave room for wonder.

- New loads
- New lanes
- Predictable schedules
- Knowing what's next





RETENTION AT ANY SIZE

The Industry is Adopting Technology Quickly

- Cameras, safety systems, oversight, automated check-ins, truck-specific navigation: Drivers embrace technology when you seek buy-in and feedback. Use ambassadors to promote and support initiatives.
- Implement and introduce in person: Offer visibility into why and how you utilize tech.
- Reframe new tools and oversight positively: Technology is here to stay and becoming more prevalent. Adopt strategies to understand tools and utilize them to improve communication, productivity, safety, and earnings.

READY, SET.... LET'S GO!

Preparing For What's Ahead

Actions your fleet can take right now and going forward
to win trucking's talent tug-of-war



READY, SET....LET'S GO!

Peak Season Planning is Now

Get AHead Start

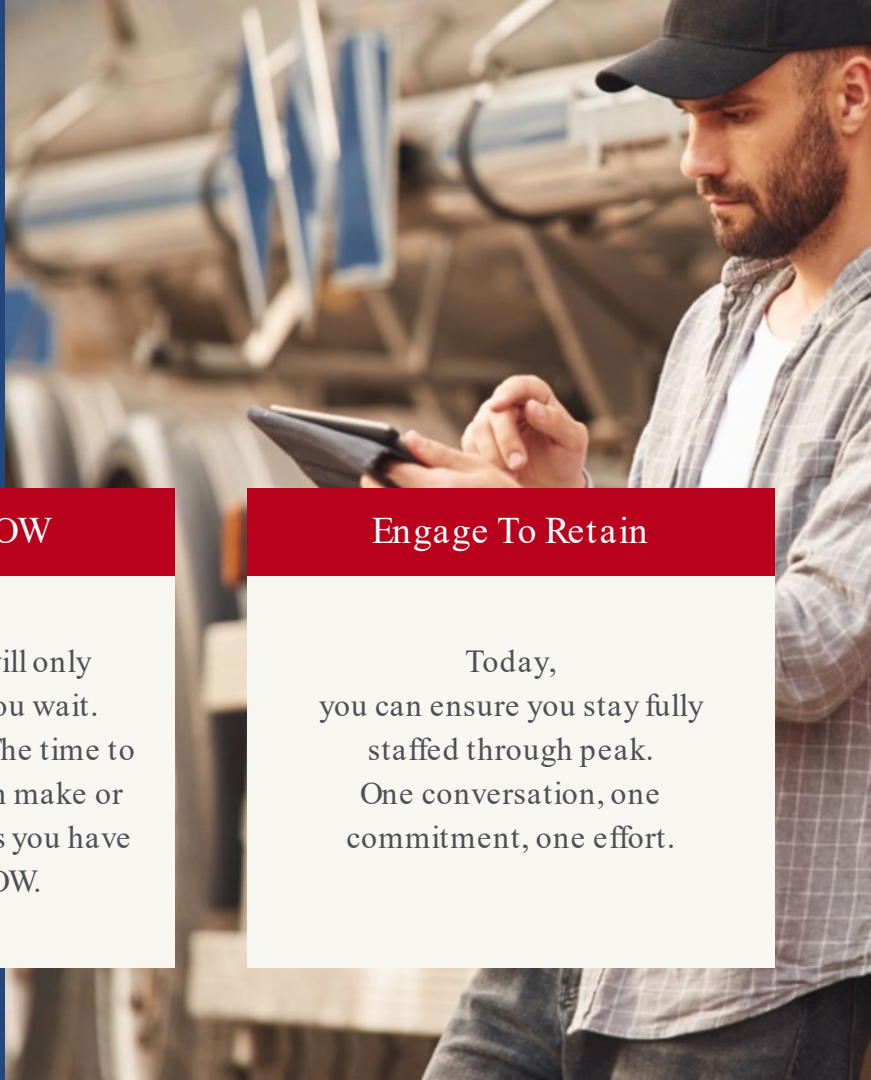
Carriers that invest in their people don't scramble. They're ready to say 'yes' to any opportunity. Have conversation every week about what's ahead and you'll drown out the noise of other carriers waiting to poach.

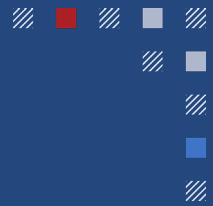
The Time IS NOW

The cost to recruit will only increase every day you wait. Peak is 90 days away. The time to close on a new hire can make or break the opportunities you have coming. Start NOW.

Engage To Retain

Today,
you can ensure you stay fully
staffed through peak.
One conversation, one
commitment, one effort.





READY, SET....LET'S GO!

What growing fleets do to win

Planning For Success

Take the energy from here and plug it in to every conversation, check-in, plan, and person.

Pay & Schedule Transparency

Consistent, correct pay validates a driver's decision to join your company.

Regular work and time off that drivers can count on reduces aggravation on the job and keeps their attention with you.

Invest In Your People

There is a reward for reliability. Retention investments pay off as soon as the freight shows up. Do the same and show up for your team daily, weekly, monthly.

READY, SET.... LET'S GO!

Drivers Tell Us Why They Stay

Driver needs haven't drastically changed, but the industry is evolving and so are they

RECOGNITION

- Milestones are celebrated
- Million-mile dinner
- Company picnic
- Lease completion dinner

PURSUE EXCELLENCE

- Shop treats me like a customer
- Safety is a core value and rewarded
- Honesty is expected
- Drivers look and act professionally



CALLS > TECHNOLOGY

- Communication is foundational
- They know my voice
- Friendly, consistent communication
- Trust, respect, planning, No BS

PAY

- Keep me productive/happy
- Extra work is rewarded
- Reframe short loads as opportunity for quick return

SIZE MATTERS

- Driver-owned emphasis
- Empathy
- Personalized experience
- Planning/loads/execution/rewards

3 MONTHS OF SIRIUSXM RADIO FOR \$1



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