2022-2023 SURVEY

CCJ Buyer Behavior and Connectivity Report

> RANDALL REILLY



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Methodology

The following report examines the results of a survey that was emailed to trucking fleets. The purpose of the survey was to gather information on how fleets make equipment purchasing decisions and use current technologies, such as smartphones, mobile devices, computers, business information resources and social media.

The survey was conducted in August 2022.

A total of 221 questionnaires were submitted and are included in this report.

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What is your primary job description?

Total Respondents.		221
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74%	26%
Fleet Executive 163	Fleet Employee . <mark>58</mark> (non-driver)

Please specify
your gender:14%Male86%Female14%

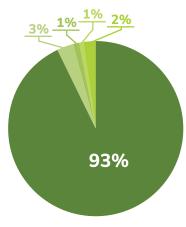
Age:

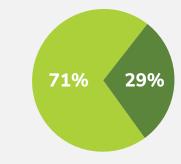
Up to 54 29%

55 or older ...**71%**

Please specify your ethnicity:

White	%
Hispanic or Latino39	%
Black or African American19	%
Native American or American Indian 1 9	%
Asian/Pacific Islander	%
Punjabi09	%
Other	%





5%

32%

57%

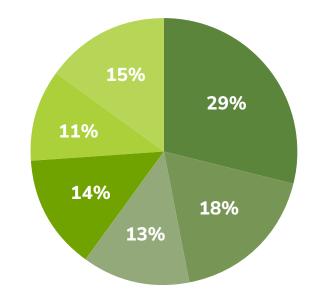
Type of Fleet

For-hire60)%
Private	5%
Other 5	5%

What is your role within your organization?

Corporate Management 46%	
Operations/Safety Management 30%	
Maintenance Management 13%	
Purchasing/Admin/ Marketing Management <mark>5%</mark>	
Other 6%	

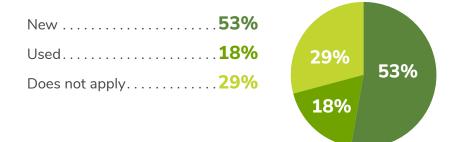
How many power units does your organization operate?



10 to 24	29%
25 to 50	18%
51 to 100	13%
101 to 250	14%
251 to 500	11%
More than 500	15%

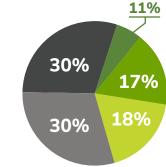
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Was the last equipment purchase that you made new or used?



When did you first start thinking about your purchase?

1 to 2 month 6%	
3 to 7 months 17%	
8 to 11 months 18%	
12 to 18 months	
More than 18 months	



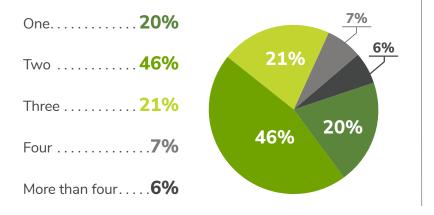
What influenced you to start the purchase process?

Need to replace aging trucks	
New business required us to expand our capacity 30%	
New business required a different vehicle type	
Other	



60% plan purchases 12+ months in advance, with equipment replacement top reason for most recent acquisition.

How many different brands did you consider?



What about the truck brand you chose caused you to buy it again or to switch brands? (Select all that apply)

Reliability81%	
Dealer Relationship76%	
Price	
Availability*	
Features	
Dissatisfation with current brand 3%	
Features	

What influenced the choice of truck brand(s) you considered? (Select all that apply)

I've had a good experience with this brand(s)
Equipment reviews or articles on industry websites \dots 20%
I always buy the same brand 19%
Peer recommendations14%
Dealer recommendation 13%
Other
Equipment reviews or articles on social media7%



While prior brand experience was a top consideration, 80% considered multiple brands on last purchase.

Industry News and Information Sources

On a scale of 0 to 10 (where 0=never and 10=constantly) how frequently do you use the following sources of information about the trucking industry?

Email newsletters7.2	
Magazine/Trucking industry websites 6.7	
Digital magazines* 5.8	
Supplier websites 5.0	
Webinars4.8	
In-person meetings and conventions4.6	
Virtual meetings and conventions4.2	
Video	
Social media (Facebook, LinkedIn, Twitter, etc.)3.6	
Radio/Satellite radio 3.0	
Podcasts2.0	

Email newsletters are the most highly used information source for trucking.

	0 - Never	1	2	3	4	5	6	7	8	9	10 - Constantly
Email newsletters	3%	2%	4%	4%	5%	9%	8%	11%	19%	15%	22%
Magazines/Trucking industry sites	5%	2%	1%	6%	4%	14%	6%	16%	14%	11%	20%
Digital magazines*	9%	5%	5%	5%	6%	13%	9%	16%	9%	8%	15%
Supplier websites	12%	7%	6%	8%	8%	15%	11%	7%	14%	4%	9%
Webinars	14%	9%	8%	10%	9%	6%	7%	8%	13%	6%	10%
In-person meetings and conventions	10%	11%	10%	10%	9%	14%	5%	5%	9%	7%	9%
Virtual meetings and conventions	16%	11%	10%	12%	4%	10%	7%	10%	8%	5%	7%
Video	19%	9%	10%	8%	5%	17%	7%	9%	8%	5%	3%
Social Media (Facebook, LinkedIn, Twitter, etc.)	29%	11%	13%	5%	4%	6%	5%	5%	9%	5%	8%
Radio/satellite radio	30%	19%	6%	10%	5%	8%	3%	5%	5%	5%	4%
Podcasts	48%	16%	7%	6%	4%	4%	3%	4%	5%	1%	2%

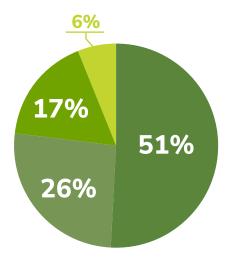
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Which of the following devices do you use to access the Internet? (Check all that apply)

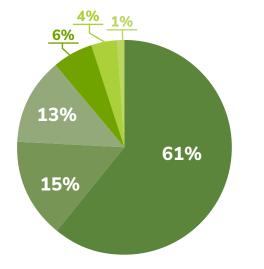
Desktop	
Handheld device (i.e. Smartphone or PDA)	
Laptop	
Tablet (i.e., iPad, Kindle Fire, Samsung Galaxy, Microsoft Surface, etc.) 39%	

Which do you use most often to access the Internet?

Desktop	51%
Laptop	26%
Handheld device	17%
Tablet	6%



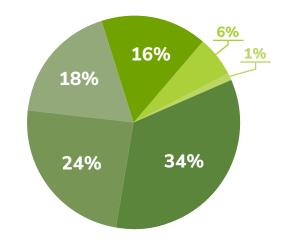
When looking for equipment or services information from companies online, which of these are you most likely to try first?



Web search (such as Google)	61%
Click a link with the company's name	15%
Review articles about products	13%
None of the above	. 6%
Search a directory	. 4%
View a video	. 1%
Click on a banner ad	. 0%
Other	. 0%

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When live chat (live customer support) is offered on a website how frequently do you use it?



Occasionally	.34%
Very rarely	.24%
Rarely	. 18%
Never	. 16%
Very frequently	6%
Always	1%

Which of the following voice-activated assistants do you use? (Check all that apply)

Alexa	.20%
Google Home	.13%
Siri	.25%
Other	1%
I don't use any voice-activated assistants	.55%



On a scale of 0 to 10 (where 0 = never and 10 = constantly), how frequently do you use these voice-activated assistants?

Alexa	6.3	
Google Home	6.4	
Siri	. 5.2	
Other	5.7	

	0 - Never	1	2	3	4	5	6	7	8	9	10 - Constantly
Alexa	2%	0%	12%	5%	12%	7%	12%	12%	16%	5%	19%
Google Home	0%	0%	4%	11%	19%	11%	7%	7%	11%	7%	22%
Siri	2%	11%	7%	11%	9%	19%	7%	6%	11%	6%	11%
Other	0%	0%	0%	0%	33%	33%	0%	0%	33%	0%	0%

What type of smartphone apps do you use regularly? (Check all that apply)

Weather	77%	Personal finance	20%
News	55%	Sports	19%
Work-related	53%	Books	16%
Music & audio	44%	Magazines	16%
Social media	43%	Health	12%
Video	27%	Truck Stops	11%
My fleet's app	26%	Truck Parking	6%
Games	25%	l don't use any apps	6%
Travel	25%	Job apps	3%
Routing	21%	Other	2%

Top apps used are weather, news and work-related.

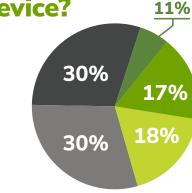
Do you listen to podcasts?



62% stream music, with Pandora and Spotify the most heavily used services

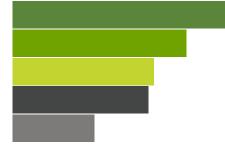
Which of the following audio content do you stream on your device?

Music 62%	
Sports 14%	
Podcasts 18%	
Other	
None of the above 31%	

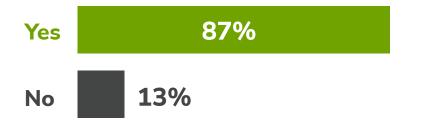


If you stream music from your device, which of the following options do you use? (Check all that apply)

Pandora	40%
Other	32%
Spotify	26%
Apple Music	25%
iHeart Radio	15%



Do you own a TV that has streaming capabilities (connected to internet)?



Which device(s) is used for watching shows, movies, sports, videos, etc.? (Check all that apply)

Roku	. 43%	
Amazon Fire TV	. 30%	
Other	. 24%	
Apple TV	. 18%	
Chromecast	7%	
Android TV	5%	
Xbox	3%	

Which streaming movie/TV services do you use? (Check all that apply)

Netflix 75%
Amazon Video58%
Hulu
Disney+ 34%
Youtube TV
Apple TV/iTunes
Other 13%
Pluto TV
l don't subscribe to any streaming movie/TV services
DirectTV Now 6%
Samsung TV Plus 6%
Google Play 5%
Sling TV 4%
Quibi0%

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Do you use any of these social media resources? (Check all that apply)



On a scale of 0 to 10 (where 0 = never and 10 = constantly), how frequently do you use these social media platforms to get information about the trucking industry? (Respondents received only those social media platforms they selected as using in the previous question.)

		0 Never	1	2	3	4	5	6	7	8	9	10 Constantly
Facebook 5.4	Facebook	9%	3%	11%	11%	7%	9%	8%	10%	10%	6%	16%
LinkedIn 5.2	LinkedIn	10%	8%	9%	5%	6%	12%	15%	8%	11%	3%	13%
Twitter 4.8	Twitter	18%	5%	13%	5%	5%	11%	11%	3%	5%	5%	18%
Youtube 4.9	Youtube	10%	7%	9%	13%	10%	9%	3%	10%	13%	6%	10%
Instagram 4.4	Instagram	20%	6%	14%	8%	4%	8%	4%	12%	4%	2%	16%
Pinterest 4.4	Pinterest	29%	3%	3%	6%	12%	3%	9%	9%	15%	0%	12%
TikTok 3.7	TikTok	26%	9%	9%	13%	0%	9%	17%	4%	0%	0%	13%
Reddit 3.4	Reddit	29%	0%	21%	14%	0%	7%	14%	0%	7%	0%	7%

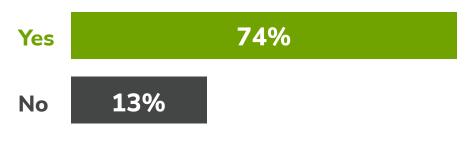
What is the main reason you use social media? (Check only one)

5%

35%

Connect & keep in touch with friends & family	.35%	
Find the latest news	.28%	9% 17%
Make professional & business contacts	.17%	1/ %
Other	9%	28%
Share videos and photos	5%	
Follow thought leaders or celebrities	5%	
Make new friends	0%	

Do you use your smartphone to access social media services?



Which types of social media content do you engage (like, share, comment) with the most? (Check all that apply)

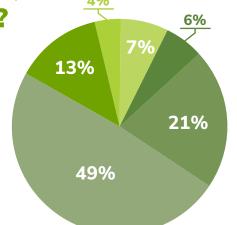
News articles60%	
Industry research	
Pictures35%	
Videos	
I don't engage with social media 19%	
Jokes 13%	
Quotes	
Questions6%	
Polls 5%	
Deals and Coupons 4%	
Contests/Giveaways4%	
Other	

What type of trucking-related videos do you like? (Check all that apply)

Technical how-to	. 49%
Interviews with trucking experts	. 46%
Business how-to	. 43%
Drive tests & other equipment info	. 35%
Custom trucks	. 25%
I don't look at trucking related videos	. 21%
Interviews with drivers	. 20%
Entertainers & other celebrities	6%

How frequently do you take an action (visit a website, share the video, search) after watching a video?

Never	6%
Rarely	21%
Occasionally	49%
Often	13%
Frequently	. 4%
Does not apply	7%



Technical/ Business howto videos and interviews are topics of most interest, with 66% taking action after viewing a video.



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For more information, visit: www.randallreilly.com.