

Technology & Maintenance Council



Turning Experience Into Practice

*Issued:
April 28, 2020*

Impacts of COVID-19 on Maintenance Operations of Fleets and Service Providers: Results From Survey 2 (April 27, 2020)

Developed by the Technology & Maintenance Council (TMC)

ABSTRACT

In March 2020, ATA's Technology & Maintenance Council (TMC) decided to conduct a series of member surveys to assess the impacts of the COVID-19 pandemic on the maintenance operations of fleets and service providers. TMC's first survey, conducted in the early phase of the event in late March 2020, investigated current and anticipated impacts on technician labor force readiness and commercial vehicle component supply chains. TMC's second survey in the series was conducted in late April 2020 as a follow-up to the initial investigation.

The April 2020 survey found actual average impacts in both the shop labor force and parts/equipment availability areas have increased slightly but overall continue to be minor when compared to the previous survey. Shop support supplies deliveries continue to be more moderately impacted. TMC members say they expect impacts on all labor, shop support supplies and parts/equipment categories to remain or downgrade to minor concerns, with slight increases for labor only. The ability to recruit, hire and train new or replacement technicians continues to be a challenge, with moderate disruptions currently being encountered, as was reported in the first survey.

TMC intends to repeat this survey periodically during the pandemic event to measure the ongoing risk to maintenance operations and essential transportation functions.



Technology & Maintenance Council (TMC)

950 N. Glebe Road • Arlington, VA 22203 • Ph: (703) 838-1776 • FAX: (703) 838-1701
tmc@trucking.org • <http://tmc.trucking.org>

INTRODUCTION

In March 2020, ATA's Technology & Maintenance Council (TMC) decided to conduct a series of member surveys to assess the impacts of the COVID-19 pandemic on the maintenance operations of fleets and service providers. TMC's first survey, conducted in the early phase of the event in late March 2020, investigated current and anticipated impacts on technician labor force readiness and commercial vehicle component supply chains. TMC's second survey in the series was conducted in late April 2020 as a follow-up to the initial investigation. TMC intends to repeat this survey periodically during the pandemic event to measure the ongoing risk to maintenance operations and essential transportation functions.

The March 2020 survey asked whether a fleet or service provider had experienced confirmed exposures or cases of infections by the SARS-CoV-No.2 (i.e., COVID-19 virus), the effects upon the organization's technician workforce availability and if the supply chains providing parts and supplies to sustain these maintenance operations were currently being compromised. The survey also asked for the organization's projections on impacts during the next 30 days (i.e., April 2020).

To help ensure only one survey would be submitted per company, TMC distributed the survey instrument only to primary TMC Full(fleet) and Service Provider members, instructing them

to complete the survey themselves or, if necessary, share it with the best person to respond for that organization. All responses were kept strictly confidential and only aggregated results are reported herein. Respondents were given the option of providing contact information for follow-up or answering anonymously.

METHODOLOGY

Survey alerts were sent via e-mail (see **Figure 1**) to Full (fleet) Executive and Service Provider Corporate Level Council members using Bluehornet's High Roads e-mail management system. The survey was programmed and conducted using Survey Monkey. The survey was activated on April 20, 2020, and closed April 24, 2020.

RESULTS

Forty-two unique completed responses were submitted — 32 by fleets and 10 by service providers. Company/fleet size varied from very small to large, and included local, regional and national organizations. The summary responses to the survey questions are as follows:

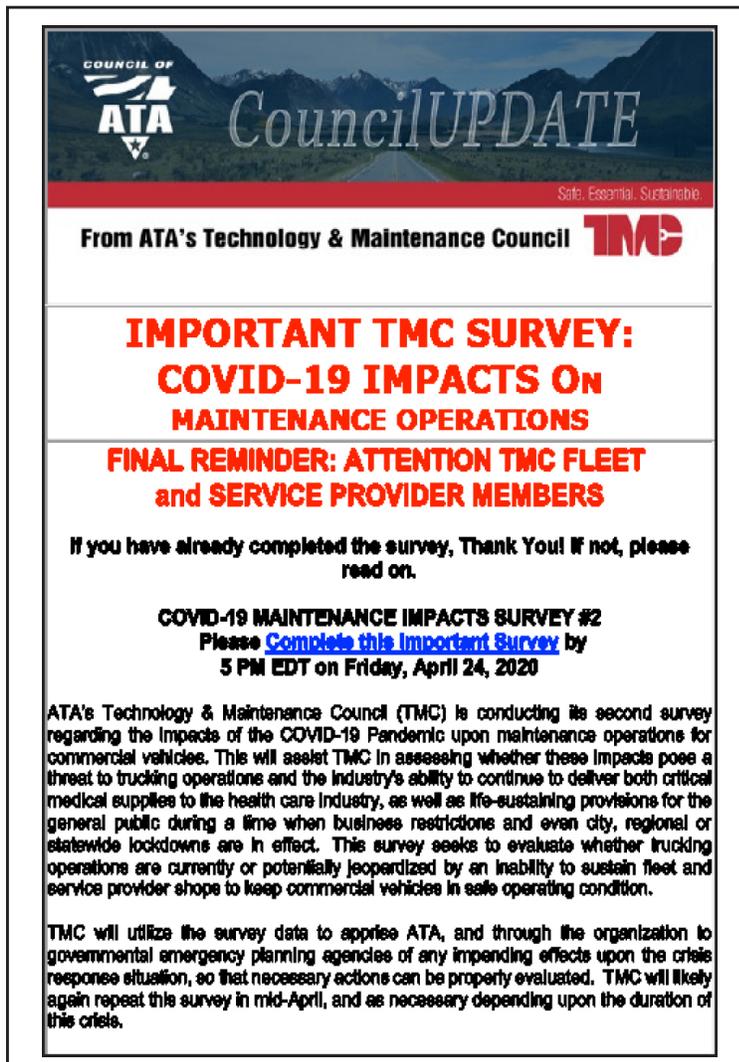


Figure 1

DEMOGRAPHICS

The first set of questions identified organizational demographics.

Company Operational Types	Percent	Number
Private Carrier (For Hire)	42.11%	16
Vocational	5.26%	2
Intermodal	2.63%	1
Leasing (full service)	7.89%	3
Truckload	18.42%	7
Less-Than-Truckload	5.26%	2
Pickup & Delivery	2.63%	1
Service Provider	26.32%	10

(NOTE: Several respondents reported multiple operational types.)

Primary Area of Operations	Percent	Number
Nationally	31.58%	12
Northeast	28.95%	11
Northwest	2.63%	1
Mid-Atlantic	10.53%	4
Midwest	28.95%	11
Southeast	23.68%	9
South Central	7.89%	3
Southwest (Including Hawaii)	5.26%	2
Alaska	0.00%	0
Canada	13.16%	5
Mexico	2.63%	1

(NOTE: Several respondents reported multiple operational areas.)

Fleet Size

Operational fleet size was reported as follows:

Fleet Size	Percentage
0-50 vehicles	Approx. 8%
50-100	16%
100-500	33%
500-1000	19%
More than 1000	24%

Maintenance Operations

Sixty-five percent of the respondents conducted maintenance operations with both in-house and outside (third-party) shops, 32

percent conducted maintenance at exclusively in-house facilities and only three percent contracted maintenance to outside third-party facilities. It is noteworthy that even service provider companies reportedly assign at least some of their work to third parties.

Disaster Planning

Forty-two percent of the respondents confirmed that they have formal maintenance operational disaster mitigation plans similar to the guidance provided in TMC RP 537, *Disaster Recovery for Vehicle Maintenance Operations*. Fifty-eight percent did not.

WORKFORCE IMPACTS

The survey asked a series of questions regarding impacts of the COVID-19 pandemic upon maintenance operations' labor force, both in the current time frame (April 2020) and during the next 30 days (May 2020).

COVID-19 Case Experience

Of the responding organizations:

-  • Eighteen (47 percent) reported no employee exposures, 14 percent less than in Survey 1 (March 2020).
-  • Six (16 percent) reported exposures or suspicions of exposure outside the workplace, 12 percent more than in Survey 1.
-  • Two (5 percent) reported exposures or suspicions of exposure inside the workplace, a five-percent reduction.
-  • Four (11 percent) reported a confirmed, but asymptomatic COVID-19 diagnosis, a seven-percent increase.
-  • Seven (18 percent) reported a confirmed COVID-19 diagnosis with symptoms, a three-percent increase.
- Four respondents did not know.

Current COVID-19 Impacts on In-House Maintenance Labor Force Availability

Full-Time Technicians

- Twenty-one reported no impact
- Twelve reported minor impact
- Three reported moderate impact
- One reported severe impact

Part-Time or Contract Technicians

- Twenty-six reported no impact
- Six reported minor impact
- One reported moderate impact
- Two reported severe impact

Maintenance Supervisors

- Twenty-nine reported no impact
- Four reported minor impact
- Two reported moderate impact
- One reported severe impact

Maintenance Managers/Execs

- Twenty-two reported no impact
- Eleven reported minor impact
- Four reported moderate impact
- None reported severe impact

Ability to Recruit/Hire and Train New or Replacement Technicians

- Ten reported no impact
- Eleven reported minor impact
- Eight reported moderate impact
- Five reported severe impact

May 2020 Projections of COVID-19 Impacts on In-House Maintenance Labor Force Availability

Full-Time Technicians

- Thirteen project no impact
- Eighteen project minor impact
- Four project moderate impact
- One project severe impact

Part-Time or Contract Technicians

- Twenty-three project no impact
- Ten project minor impact
- One project moderate impact
- Two project severe impact

Maintenance Supervisors

- Twenty-two project no impact
- Ten project minor impact
- Two project moderate impact
- One project severe impact

Maintenance Managers/Execs

- Nineteen project no impact
- Fourteen project minor impact
- Three project moderate impact
- None project severe impact

Current COVID-19 Impacts on Outside (Third-Party) Maintenance Availability

- Eight reported no impact
- Thirteen reported minor impact
- Eight reported moderate impact
- None reported severe impact

May 2020 Projections of COVID-19 Impacts on Outside (Third-Party) Maintenance Availability

- Six project no impact
- Seventeen project minor impact
- Six project moderate impact
- None project severe impact

- Eight reported no impact
- Seventeen reported minor impact
- Twelve reported moderate impact
- None reported severe impact

SUPPLY CHAIN IMPACTS

The survey also asked a series of questions regarding impacts of the COVID-19 pandemic upon deliveries of fleet equipment and parts (including fuels and lubricants), as well as deliveries of shop support supplies (e.g., uniforms, gloves, cleaning supplies, etc.). The question was posed for the current time frame and projections for the next 30 days.

May 2020 Projections of COVID-19 Impacts on Deliveries Of Fleet Equipment And Parts (Including Fuels And Lubricants)

- Five projects no impact
- Twenty-four project minor impact
- Eight project moderate impact
- None project severe impact

Current COVID-19 Impacts on Deliveries of Fleet Equipment and Parts (Including Fuels and Lubricants)

Current COVID-19 Impacts on Shop Support Supplies (e.g., Uniforms, Gloves, Cleaning Supplies, etc.)

- Three reported no impact
- Twenty reported minor impact
- Nine reported moderate impact
- One reported severe impact

TABLE 1: WEIGHTED AVERAGES FOR CUMULATIVE SURVEY RESPONSES EVALUATION DATE — APRIL 27, 2020			
Evaluation Factor	Current Impact (Survey 1)	Projected Impact in Survey 1	Projected (30-Day) Impact
Labor Factors			
In-house Maintenance Labor Force - Full Time Technicians	0.70 (0.69)	1.38	0.97
In-house Maintenance Labor Force - Part Time Technicians	0.54 (0.34)	0.81	0.64
In-house Maintenance Labor Force - Maintenance Supervisors	0.42 (0.34)	0.86	0.60
In-house Maintenance Labor Force - Maintenance Managers/Execs	0.62 (0.70)	0.96	0.64
Ability to Recruit/Hire and Train Technicians	1.76 (1.85)	N/A	N/A
Impacts on Outside (Third-Party) Maintenance Availability	1.28 (0.89)	1.68	1.27
Supply Chain Factors			
Deliveries Of Fleet Equipment And Parts	1.76 (1.10)	1.56	1.43
Deliveries Of Shop Support Supplies	1.30 (1.92)	2.04	1.51
Impact Index: 0 = None, 1= Minor, 3 = Moderate, 5 = Severe			

May 2020 Projections of COVID-19 Impacts on Shop Support Supplies (e.g., Uniforms, Gloves, Cleaning Supplies, etc.)

- Four project no impact
- Twenty-two project minor impact
- Nine project moderate impact
- Two project severe impact

WEIGHTED SCORING OF RESPONSES

In order to more readily assess the risk to maintenance operations, responses to each of the survey factors are presented with respect to their weighted averages in **Table 1**. Weighting is assigned as follows:

- "No Impact" = 0
- "Minor Impact" = 1
- "Moderate Impact" = 3
- "Severe Impact" = 5

CONCLUSIONS

The survey found that in late April 2020, actual average impacts in both the shop labor force and parts/equipment availability areas have increased slightly but overall continue to be minor when compared to the previous survey. Shop support supplies deliveries continue to

be more moderately impacted. These actual experiences were significantly less severe than the impacts projected by the respondents 30 days ago.

TMC members say they expect impacts on all labor, shop support supplies and parts/equipment categories to remain or downgrade to minor concerns, with slight increases for labor only. The ability to recruit, hire and train new or replacement technicians continues to be a challenge, with moderate disruptions currently being encountered, as was reported in the first survey. This represents decreasing levels of concern relative to what was expressed in the first survey. The ability to recruit, hire and train new or replacement technicians continues to be a challenge, with moderate disruptions currently being encountered, which is the same level reported in the first survey.

TMC intends to repeat this survey periodically during the pandemic event to measure the ongoing risk to maintenance operations and essential transportation functions. □