# Study Overview: 2026 U.S. LTL Customer Value & Loyalty Study – 22nd Edition

## Introduction

Mastio & Company proudly presents the 22nd Edition of the U.S. Less-Than-Truckload (LTL) Customer Value & Loyalty Study—a comprehensive analysis designed to illuminate the perceptions, needs, and decision-making drivers of LTL shippers across the U.S. This annual study serves as the industry benchmark for understanding what truly matters to LTL customers and how carriers can outperform their competitors.

## Scope and Methodology

- **Robust Sample:** Insights are drawn from in-depth interviews with 1,647 key decision-makers, generating approximately 5,300 carrier observations and 3,000 qualitative responses.
- **Comprehensive Coverage:** 155 LTL carriers were evaluated, with 24 carriers receiving sufficient ratings for detailed comparative analysis.
- **Rigorous Data Collection:** Industry-experienced researchers conducted telephone interviews from late June to September 2026, ensuring high-quality, actionable data.
- **Segmentation:** Results are segmented by geography, shipment volume, industry vertical, and more, allowing for granular analysis tailored to specific business needs.

## Why Choose Mastio?

Mastio's research delivers more than just data—it provides strategic clarity. Successful organizations know that sustained growth depends on understanding and exceeding customer expectations. Our study empowers you to:

- Pinpoint what customers value most
- Identify areas for operational or service improvements with the highest ROI
- Align sales and marketing strategies with market realities
- Track progress with empirically validated customer value and loyalty metrics

MASTIO & COMPANY
Actionable Insights For Industry

**Carriers included in the 2026 Mastio U.S. LTL Study:**

| Carrier |
|---|
| A. Duie Pyle |
| AAA Cooper |
| ABF |
| Averitt Express |
| Central Transport |
| CrossCountry Freight Solutions |
| Daylight Transport |
| Dayton Freight Lines |
| Diamond Line |
| Dohrn |
| Estes |
| FedEx Freight |
| North Park Transportation |
| Oak Harbor Freightlines |
| Old Dominion |
| Peninsula Truck Lines |
| Pitt Ohio |
| R&L Carriers |
| Roadrunner |
| Saia |
| Southeastern Freight Lines |
| TForce Freight |
| Ward Trucking |
| XPO |

3300 Dale Avenue., Suite 109, St. Joseph, MO, 64506 USA
T 816-364-6200 ● www.mastio.com

## Key Questions Answered

Subscribers gain clarity on critical market dynamics, including:

1. **Customer Decision Drivers:**
    - What factors most influence shippers' perceptions of value and loyalty?
    - Which carrier attributes are baseline requirements versus true differentiators?
2. **Competitive Positioning:**
    - How does your company's value and loyalty compare to competitors?
    - Where do you and your competitors stand on the industry value map (inferior, economy, superior, premium)?
    - What actions will shift your market position?
3. **Performance Insights:**
    - How do shippers rate your company on key buying factors?
    - What are your relative strengths and weaknesses?
    - Which improvements will yield the highest impact on customer acquisition and retention?
4. **Role of Pricing:**
    - How significant is price in the purchase decision?
    - Which performance factors justify a premium?
5. **Market Vulnerability and Opportunity:**
    - Which carriers are best positioned to gain or lose market share?
    - How can you leverage these insights for growth and profitability?

## Deep-Dive Qualitative Insights

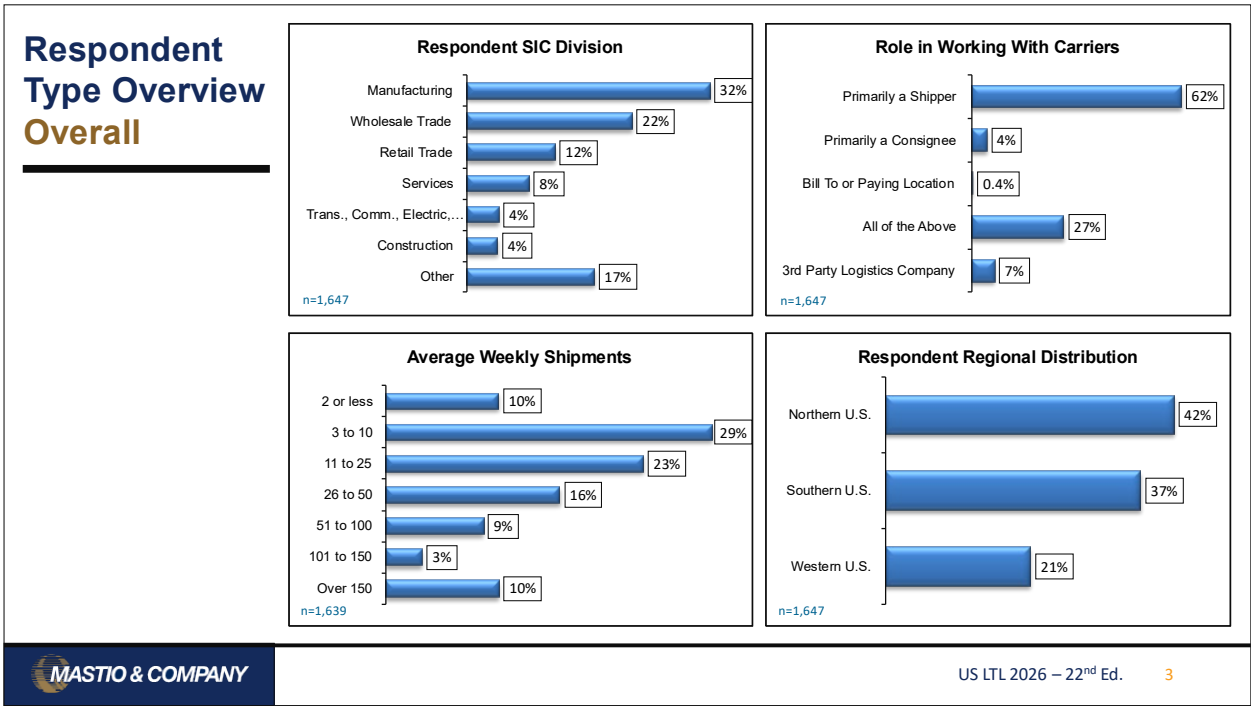
The study includes extensive open-ended feedback, addressing:

- Recent disappointments (excluding price)
- Carrier switching behavior and rationale
- Cross-border shipping needs and preferences
- Assessment of digital tools and website features

## Multi-Dimensional Analysis

Data is segmented for actionable insights across:

- **Shipment Volume** (from 2 or fewer to 150+ per week)
- **Industry Verticals** (NAICS codes provided)
- **Geographic Regions** (state-by-state analysis)




## Deliverables

Subscribers receive:

- A detailed printed report
- Microsoft Excel raw data files
- Proprietary segmentation and analysis software for custom data exploration
- Custom tagging features for advanced, client-specific analysis

## In Summary:

The 2026 U.S. LTL Customer Value & Loyalty Study is your roadmap to winning more loyal customers, outperforming competitors, and achieving measurable business results in the dynamic LTL market.

## Methodology

Unlike generic satisfaction surveys, Mastio's approach is grounded in proven methodologies that correlate directly with growth, market share, and profitability. Our dual focus on Customer Value and Loyalty provides clear, actionable dashboards for ongoing performance management.

## About Mastio & Company

With over 37 years of experience and 300+ successful industry studies, Mastio & Company is a trusted partner for organizations seeking to enhance customer understanding, outpace competitors, and drive sustainable business growth. Our research team combines industry expertise with rigorous quality control, delivering insights you can trust.