

Public attitudes to the logistics sector



Content

1 EXECUTIVE SUMMARY AND KEY INSIGHTS	1
2 RESEARCH BACKGROUND	3
2.1 INTRODUCTION TO THE RESEARCH	3
2.2 RESEARCH AIM.....	3
2.3 RESEARCH OBJECTIVES	4
2.4 METHODOLOGY.....	4
3 PUBLIC ATTITUDES TOWARDS FREIGHT AND LOGISTICS.....	7
3.1 AWARENESS AND KNOWLEDGE OF THE LOGISTICS INDUSTRY	7
3.2 AWARENESS OF FTA	11
3.3 CURRENT PERCEPTIONS OF THE LOGISTICS INDUSTRY	11
4 PERCEPTIONS OF BENEFITS AND DRAWBACKS OF FREIGHT	15
4.1 THE BENEFITS OF FREIGHT	15
4.2 THE DRAWBACKS OF FREIGHT	17
5 PROMOTING THE VALUE OF FREIGHT	22
5.1 THE CONTEXT FOR COMMUNICATION	22
5.2 PRIORITY ISSUES FOR THE LOGISTICS AND FREIGHT INDUSTRY.....	23
5.3 INFORMATION AND EDUCATION NEEDS.....	24
6 CONCLUSIONS AND RECOMMENDATIONS	28
APPENDIX A: DISCUSSION GUIDE.....	30
APPENDIX B: OMNIBUS SURVEY.....	36
APPENDIX C: TECHNICAL APPENDIX.....	40
6.1 QUALITATIVE RESEARCH	40
6.2 QUANTITATIVE RESEARCH.....	41

1 Executive summary and key insights

This report presents the findings from the qualitative and quantitative research commissioned by Freight Transport Association to examine current public attitudes towards the logistics sector and the potential need for public communication.

The public's understanding of freight

- The public's current knowledge and understanding of the logistics industry was modest. Few had consciously considered the industry before taking part in the research
- The term 'freight' was not liked and was seen as a specialist term with industrial connotations. Other terms such as 'distribution' followed closely by 'logistics' were felt to be a better way to describe the industry, and tended to have a more positive resonance
- Distribution or logistics was felt to be a hidden aspect of the product lifecycle, and the role of freight in allowing the public to access goods and services was seen as a 'behind the scenes' activity
- Many admitted they took the benefits of freight for granted and had rarely, if ever, considered the mechanics of how the industry works. However, when encouraged to consider the role of freight, people noted that it was "amazing" and a crucial part of modern society
- Convenience, reliability, variety and speed were felt to be the main benefits of freight across all types of commodities. The transportation of food and drink, as well as medical supplies, was deemed to be the clearest advantage of the industry

How the public have developed their understanding of freight

- Current knowledge about the freight industry was gained mostly through documentaries and news

- A key finding of this research was the extent to which road freight was used as the lens through which the freight industry as a whole was considered and assessed. Despite a lack of awareness of the mechanics of the logistics industry, attitudes towards road freight in particular were quite well defined
- Drawbacks to the industry were articulated through frustrations with road transportation. Congestion, road safety concerns (particularly concerning lorries) and environmental concerns were felt to be the top three public anxieties about the logistics sector. However, freight was largely accepted as a 'necessary evil' by the public who understood that the results of freight transportation were largely to their benefit

Interest in future information and communication

- There was little appetite for new information about freight and the logistics industry overall
- When encouraged respondents thought that any future information should tackle the main concerns the public have about freight, by highlighting: safety improvement on the roads, how the industry is tackling congestion caused by road freight, and what the industry is doing to reduce the sector's impact on climate change
- It was thought that a prominent communications campaign may stimulate some cynicism about why the logistics industry is seeking to communicate with the public. People were curious as to why a communications campaign would be necessary. They felt this might make the industry look defensive and inadvertently highlight some negative aspects of the industry in so doing
- Despite this cynicism there seemed to be some value in promoting freight to the public to tackle some of their negative views and perceptions. Through outlining the benefits of freight more tangibly, providing greater confidence in the safety of road freight, targeting local issues and communicating measures to counteract environmental impact, it may be possible to shift attitudes towards a more positive outlook on freight

2 Research background

2.1 Introduction to the research

Freight Transport Association (FTA) traces its roots back to 1889. FTA's mission is to represent the views and interests of over 14,000 members – from large multinationals and household names to small and medium businesses. It is one of the largest trade associations in the UK, with members moving goods by road, rail, sea and air.

Very little is known about the public's attitudes towards the logistics sector, however there were expectations that perceptions were likely to be negative.

TNS-BMRB was invited by Freight Transport Association to conduct a programme of qualitative and quantitative research amongst the public to explore attitudes towards the logistics sector.

2.2 Research aim

FTA wants the public to see, understand and appreciate the benefits of freight.

The overall aim of this research was to understand the general public's attitudes and opinions towards freight.

More specifically the goal of this research was to deliver insights around:

- how best to communicate with the general public about freight
- how the public have developed their understanding and views about freight
- what messages and channels they currently use to inform their views, and
- what future information and communication they would be most interested in and through which channels they would like this delivered

2.3 Research objectives

The objectives of this research were to:

- establish levels of awareness and knowledge amongst the public:
 - expose public knowledge about freight and main information sources used to educate around freight
 - explore the knowledge gaps, and the myths and misconceptions surrounding the logistics sector, and to
 - uncover which modes of freight are more prevalent in their minds and why
- explore current perceptions in relation to freight (positive and negative) and understand what has influenced these perceptions
- explore which aspects of freight across modes and topics (eg safety, environment issues, congestion) are most unappealing and why
- unearth the benefits hierarchy of freight – which aspects of freight are felt to be more important and why
- gain insight about communications and/or marketing interventions that are likely to engage the general public in freight

2.4 Methodology

2.4.1 Focus groups

Twelve, 90 minute focus groups were conducted providing a broad demographic and geographic spread of the UK public. Each group was made up of 6-8 male and female respondents. The groups were spread across the 12 FTA regions in England, Scotland, Wales and Northern Ireland, and included a mix of urban, suburban and more rural areas. The groups were stratified by life stage and socio economic grade (SEG). Three groups were conducted with those that held stronger views on subjects relating to freight. They were selected on the basis of their strong positive agreement to the following attitudinal scores.

On a scale of 1-10 where 1 is 'don't care' and 10 is 'feel very strongly' where would you place yourself on these issues?

- Roads and motorways being congested with traffic
- The safety of cyclists and drivers from HGV vehicles
- CO₂ emissions from flights and road travel
- The presence of foreign vehicles on UK roads

The table below outlines the sample structure in detail.

Group Number	Nation	Region	SEG	Lifestage	Strength of opinion
1	England	Greater London	ABC1	Pre-family *SINK / DINK	
2	England	West Midlands – Sutton Coldfield	ABC1	Family	
3	England	East Midlands – Leicester	C2DE	Empty Nester / older SINK DINK	Stronger
4	England	South East England – Ashford	C2DE	Pre-family *SINK / DINK	
5	England	South West England – Exeter	ABC1	Family	Stronger
6	England	Yorkshire & Humberside – Leeds	C2DE	Empty Nester / older SINK DINK	
7	England	North East – Newcastle	C2DE	Pre-family SINK / DINK	Stronger
8	England	North West – Manchester	C2DE	Family	
9	England	East of England – Huntingdon	ABC1	Empty Nester / older SINK DINK	
10	Wales	Cardiff	CD2E	Pre-family SINK / DINK	
11	N Ireland	Belfast	ABC1	Family	
12	Scotland	Glasgow	ABC1	Empty Nester / older SINK DINK	

* SINK / DINK Single Income No kids / Dual Income No Kids

A copy of the discussion guide can be found at Appendix A.

2.4.2 Omnibus

Following the qualitative phase of the research, six questions were placed on the face-to-face TNS omnibus survey in late January 2010. The omnibus survey included an unweighted sample of 2,116 adults aged 16 and over from across the UK. The findings were weighted to ensure they were representative of the UK population as a whole.

The omnibus questionnaire was written by TNS-BMRB in conjunction with the FTA research team and can be found at Appendix B.

3 Public attitudes towards freight and logistics

This chapter of the report covers levels of awareness and knowledge amongst the public about freight and its four main modes. It also explores the main sources people have used to receive information about freight.

3.1 Awareness and knowledge of the logistics industry

In general, people reflected very little about freight and the logistics industry in their day-to-day lives. All groups found it difficult to engage with the subject at times, and overall felt fairly neutral about freight, with many having very little to say.

Engagement with freight was strongest amongst:

- older people with stronger roots to an area and those reliant on driving (particularly motorway users) were the most engaged around freight issues
- drivers and cyclists who were often concerned about their safety on the roads
- there was also slightly more appreciation from those living in Northern Ireland who had a stronger recognition of the intermodal aspect of the logistics sector which allowed goods to get to them via the sea

Younger people (16-25), those without cars and/or non drivers, and those dwelling in urban areas were the least engaged with issues around freight.

“It’s not something that would interest me, or grab my attention...” (Family, C2DE, North West)

“If I heard anything in the media I would just switch off from it...this isn’t an everyday subject, it’s a bit obscure isn’t it?” (Family, C2DE, North West)

“I can honestly say that I have no feelings towards freight at all... totally neutral” (Family, ABC1, South West England)

“Unless you’re working in that industry I don’t think it would cross your mind at all” (Empty Nester/ Older SINK / DINK, ABC1, East of England)

“I think the only time we’re interested is when you go to get something and it isn’t there” (Empty Nester Older SINK / DINK, ABC1, East of England)

“I noticed today actually that a lorry was on a road that he shouldn’t be on. I’m sure there’s a sign that says 7.5 tonne limit at the top of the road.” (Empty Nester / Older SINK / DINK, C2DE, East Midlands)

Knowledge and understanding of freight and the logistics sector was limited. There were severe gaps in knowledge around the size and nature of the industry, how it works and who it includes. The main freight operators were thought to be the supermarkets, fuel companies and specialist road hauliers such as Eddie Stobart.

People tended to see freight operators as large scale, road-based haulage companies. In the group discussions, respondents often sought more information on the details of the industry’s operations, such as the extent of the industry’s contribution to pollution and information about how many foreign drivers were the roads.

There was also a degree of misunderstanding around exactly what freight is. Commonly people became confused as to whether local vans and cars could be included, whether the postal and packaging services were included, and whether it included one-off or specific loads such as removals vans. This led to the belief by many that freight only concerned large scale haulage, on a national and international level.

Current knowledge about the freight industry was gained mostly through documentaries and news.

“I saw a programme on TV when they took a sea container around the world. They showed you the size of the operation”. (Empty Nester / older SINK / DINK, C2DE, Yorkshire and Humberside, England)

References were made to past news stories about the fuel crisis, stowaways and pollutant oil tankers spilling their loads. More recently, some had heard about super tankers from China and the super lorry, prominent in the news at the time of the research, and this achieved some level of interest. One or two also mentioned supermarket chains, such as Tesco, looking into 'greener' freight modes such as canal transportation. On occasion local media stories, tackling issues such as road damage due to heavy thoroughfare of freight vehicles, would feature in the newspaper and create some debate.

"They upgraded local bridges because of the freight lorries" (Empty Nester / older SINK / DINK, C2DE, Yorkshire and Humberside, England)

Freight was not felt to be a general topic for conversation and people were rarely aware of current issues affecting the logistics sector, being more likely to discuss the roads and traffic as opposed to freight specifically.

"It's everything to keep the country going... I just don't want to know about it" (Family, C2DE, North West England)

After presenting some of the stimulus materials about freight in the discussion groups, a number of people seemed to be aware of the multi-modal aspects of freight, but most admitted that they tended to overlook this aspect of the industry.

3.1.1 Different modes

Rail

There was relatively good awareness that freight could be transported by rail, particularly from those over 50 who could remember a time when rail freight was more widely used and relied upon. People felt generally positive towards rail freight as they considered that it was more environmentally-friendly than road freight. However, it was presumed that this mode was comparatively more expensive than road freight, slower due to a lack of viable rail infrastructure in the UK and the need to link with road freight at both ends.

“I just think they should put more freight back to the trains and get the lorries off the roads” (Family, ABC1, South West England)

Sea

All knew that freight could be transported by sea, and thought that the majority of freight must be transported between countries via this mode. However, most knew relatively little about sea freight; at best they described the sea containers at local ports and noted that they seemed quite unsightly, dirty and environmentally-unfriendly. People commonly referred to oil spillages they had seen on television.

In general people felt they had little exposure to sea freight. The only time the public come into contact with sea containers was when travelling on ferries, transporting goods overseas themselves, or when they see them on TV. Goods being transported overseas were often associated with China and far eastern nations. A few participants were aware that the BBC had tracked a large ship container known as “The Box” for a year on its global journeys.

“That’s where the majority of freight goes – it goes on ships in containers?” (Pre family / SINK/DINK, C2DE, North East England)

“It’s out of sight, out of mind on the sea.” (Family, ABC1, West Midlands, England)

Air

There was also a good awareness that freight could be transported by air, though it was less spontaneously mentioned. For most, air transportation was strongly associated with leisure and there was little knowledge about what and how much was transported by air. Some thought international aid was a good example of air freight and cited news reports as being a source of imagery and information about out-bound international freight of this nature. However, some people also commonly associated it with the shipping of fresh foodstuffs that needed to be transported quickly.

Road

Everyone was very aware of road freight and equally everyone seemed to have a view about road freight. Indeed in much of the discussions on freight, respondents almost always thought only about road freight. Road freight, was used as the lens

through which the freight industry as a whole was considered and assessed. Other modes of freight were perceived to be “invisible” and did not attract such strong sentiments as did road freight.

“I didn’t really think about trains, ships and planes – it’s the lorries that jump to mind” (Family, ABC1, Northern Ireland)

“Well I think you’re not aware of the other types of transport – they are invisible, so you don’t even think about them.” (Empty Nester / Older SINK/DINK ABC1, Scotland)

“We don’t care about the other forms, because we don’t know anything about them.” (Family, C2DE, North West England)

“We only really have issues with the lorry drivers, nothing else!” (Family, C2DE, North West England)

The dominance of road freight in shaping attitudes towards freight and the logistics sector is a key finding of this research and will be discussed throughout this report.

3.2 Awareness of FTA

None of the respondents were familiar with Freight Trade Association and its role in the industry.

3.3 Current perceptions of the logistics industry

The word ‘freight’ was not something people used as part of their everyday vocabulary. It was considered to be a specialist term, with industrial roots and usage that was somewhat unfamiliar to them. Indeed, a few young people claimed they had never heard of the word “freight”. Overall the term was not liked – and some participants felt it was off-putting and served to further decrease engagement.

“I’m sorry I don’t know what it means!” (Pre family / SINK/DINK, C2DE, North East England)

“(Freight) it’s a word you don’t hear a lot!” (Family, C2DE, North West England)

“It’s just not sexy! You think about brown cardboard boxes” (Family, ABC1, South West England)

The word ‘logistics’ however evoked a very different reaction to the word “freight”. When discussing the meaning of “logistics” it was frequently met with wonder at the wide range of different people involved – buyers, packers, transporters, transport planners, wholesalers and retailers. ‘Logistics’ hinted at the whole of the industry **working together**, whereas freight seemed to bring up associations about specific loads or cargos. A number of respondents thought it was “amazing”.

This issue was examined in the quantitative omnibus. The following description of the logistics industry was given to respondents.

The following description is for an industry or sector within the UK economy

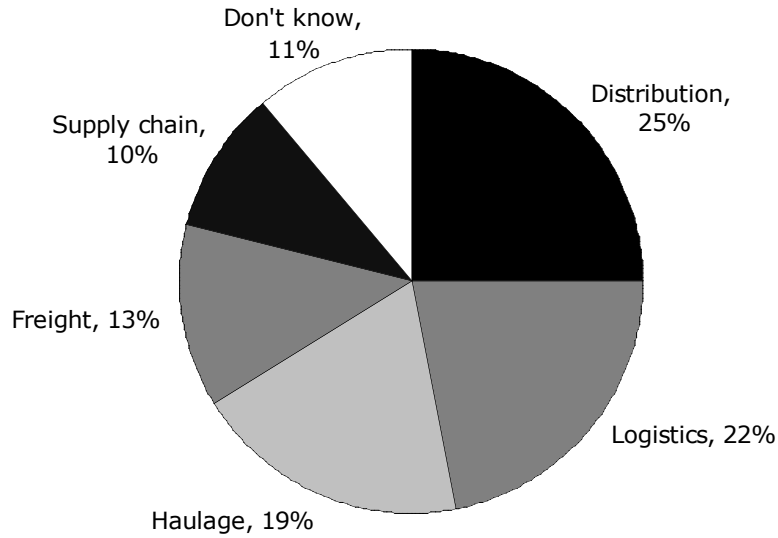
“The movement of goods and services as efficiently as possible in order to meet customer demand. The industry can be broken down into the following main categories.

- Road transport
- Rail transport
- Air transport
- Sea transport (ie container shipping, canal barges, tankers etc)

The industry includes those who purchase transport for goods and services and those who run their own fleet of commercial vehicles. In addition the storage (warehousing) and handling of goods is also included in this sector”

Respondents were asked to, thinking about the description they had just seen, choose from a selection of five naming alternatives and decide which choice best describes the industry. The results are shown below in Figure 1.

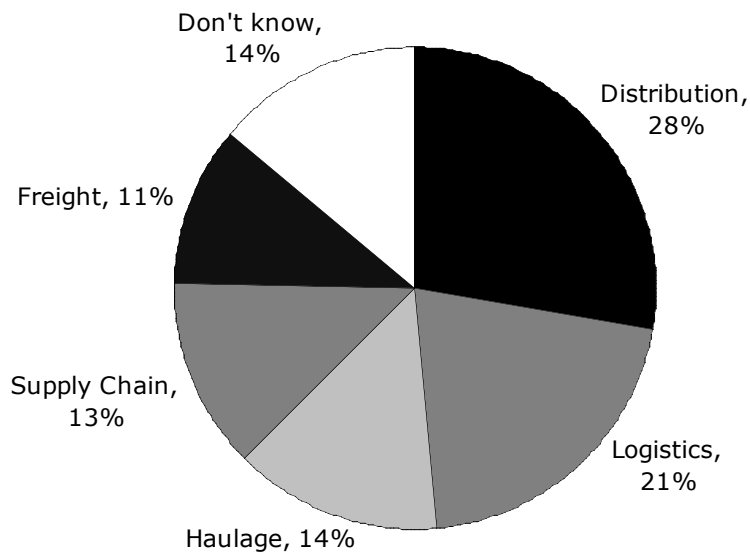
Figure 1: Word which best describes the industry



Base: 2,116

Omnibus respondents were then asked which of these words they considered was the most positive or pleasing word to describe the industry. The results are presented at Figure 2.

Figure 2: Most positive or pleasing word to describe the industry



Base: 2,116

The largest group of respondents (25%) considered that 'distribution' was the best word to describe the industry, and a similar proportion (28%) considered that it was also the most positive or pleasing way to describe the industry. This was closely followed by 'logistics' where a fifth of respondents (22%) considered this description best described the industry and was the most positive or pleasing term (21%). Men were more likely to prefer this description than women. Relatively low proportions of respondents considered 'freight' was the best description for this industry (13%) and was a positive and pleasing word (11%). This supports the findings from the qualitative research that 'freight' is neither the best, nor the most pleasing, word to use when describing the industry to the public.

In the qualitative research the meaning of the term 'freight' was explored by asking participants about the associations and connotations of the word. Imagery and associations were generally linked to associations with road freight.

- **Road vehicles and their drivers:** Lorries, motorways, HGV drivers, road etiquette
- **Certain types of haulage loads:** Bulky, massive and heavy loads
- **Distances travelled:** Long distance transportation, goods from far away and abroad

These associations tended not to be with smaller, local deliveries but with the more large scale and international logistic jobs.

"Initially when I think of freight, I think of a large amount" (Family, ABC1, South West England))

"Freight to me, by definition suggests something heavy" (Empty Nester / Older SINK/DINK, ABC1, East of England)

"The word bulk goes with it" (Pre-family / SINK DINK, C2DE, South East England)

"I think it comes down to tonnage... anything over 7 tonnes is classed as freight" (Empty Nester / Older SINK/DINK, ABC1, East of England).

4 Perceptions of benefits and drawbacks of freight

This chapter explores current perceptions of the benefits and drawbacks of freight amongst the public.

4.1 The benefits of freight

For all, the benefits of freight were very clean cut and simple to articulate. There was a significant appreciation of the necessity of freight, and the extreme importance of the logistics industry in bringing the things we need and want to our local neighbourhoods and doorsteps. This view was supported by the findings from the quantitative survey in which the majority of respondents (84%) considered the industry was important to their everyday lives, and only 12% considered it was not important.

People reflected positively that the industry is ‘a well oiled machine’, and a ‘seamless’ part of our every day lives that happens without us paying close attention to it. It seems, however, this effectiveness in carrying out business behind the scenes is somewhat responsible for its omission in the public consciousness – why consider logistics when they all work so well? Furthermore, the only time the public do hear about freight in the media is when things do go wrong (oil spillages, motorway blockades, accidents etc).

Discussing the types of commodities transported by freight, people found that they could visualise more readily its benefits and importance.

On the omnibus survey (Figure 3) respondents were asked what they believed to be the most highly important benefits of freight from a supplied list. Four-fifths indicated that transporting medical supplies and hospital equipment (84%) was either ‘extremely important’ or ‘very important’. This was followed by food and drink (80%) and strengthening the UK economy through international trading (75%).

Figure 3: Importance of aspects of the logistics and freight industry (%)

<i>The logistics and freight industry...</i>	NET: Highly important	Extremely important	Very important	Fairly important	Not very important	Not at all important	Don't Know
Transports medical supplies, drugs and hospital equipment	84	32	52	11	1	*	3
Transports food and drink	80	23	57	15	2	*	3
Contributes significantly to the UK economy	75	20	55	18	2	*	5
Supports local community services e.g. waste collection, meals on wheels	73	19	54	20	2	*	4
Is a large employer of people in the UK	71	16	55	22	2	*	5
Allows me access to a wide range of product choices	65	16	50	25	5	1	4
Can help to support the economy of developing countries	59	13	46	27	6	1	7

Base: 2,116

* Less than 1 per cent

The benefits of freight were discussed in greater detail in the qualitative research. Two key attributes came out very strongly: **convenience** and **variety**. People spoke very positively about freight allowing easy access to a wide variety of goods and products. People frequently mentioned access to a variety of culturally different products, as well as access to out-of-season food.

Other attributes associated with the benefits of freight were **speed of transportation, reliability** and **consistency of supply**.

Despite these positive associations, it was acknowledged that the public rarely think about the benefits of freight and often take it for granted. When asked to visualise a world without the freight industry, participants visualised a range of very negative scenarios. These included a breakdown of our economy as a result of no longer being able to trade goods, and a resultant breakdown in relations with other countries. Within communities participants felt that without freight there would be chaos with restrictions and limitations on basic essentials like food and drink.

“We wouldn’t survive without it” (Family, ABC1, South West England)

“It’s something that has to be there, like the breathing of air, it’s something you’ve got to have” (Family, ABC1, South West England)

“If you took freight off, we’d all just come to a standstill “ (Family, C2DE, North West England)

4.2 The drawbacks of freight

When considering the drawbacks of freight, there was a strong tendency for the public to focus upon the **impacts** of the industry, as opposed to its **purpose**. These views were drawn from negative experiences with freight – experiences with road freight, and in particular lorries.

There were three main negative concerns that emerged consistently across the groups.

- **Congestion:** This was universally perceived to be the major drawback associated with freight. Participants readily mentioned a number of negative experiences of congestion on motorways, town centres and on local minor roads. It was felt to be a major concern and something that in the view of participants was directly attributable to the freight industry
- **Safety:** Again this was seen as a major concern particularly in relation to lorry driving. Some respondents spontaneously mentioned concerns about international drivers who were perceived to have less stringent safety codes
- **Environment:** People were concerned about pollution and the damaging effect of freight on the environment

Congestion on the roads offered the public a tangible reference point from which to consider freight. Most people felt that the roads (and even the motorways) were not really designed for the volume of traffic now using them. They felt the road infrastructure in towns was not capable of coping with the increased use by delivery companies. However, despite identifying these infrastructure weaknesses participants still tended to blame the freight industry for congestion. On the open roads and motorways it was the large articulated lorries that caused most concern. In urban areas, it was the ‘white van’ that was seen as the main ‘culprit’.

“Getting stuck on the motorway behind these great huge lorries, or what my husband hates is missing the turning because one of these

trucks is in the way of the signs.” (Empty Nester / SINK/DINK, ABC1, Scotland)

“It’s the white vans that are the worst – blocking up the roads with their deliveries when you are trying to get to work” (Empty Nester / SINK/DINK, Northern Ireland)

Some respondents suggested that more use should be made of night time deliveries in town centres which would ease the congestion during the rush hour. This was confirmed in the omnibus study where three-quarters (75%) of those interviewed agreed that it was important to increase night time freight to ease congestion despite a degree of increased noise. Only 7% disagreed with this proposition and 15% indicated that they neither agreed nor disagreed.

There were mixed views about the extent to which night time deliveries already took place. Some felt that use was already being made of night time deliveries.

“I think more should be transported at night.” (Empty Nester / SINK/DINK, Northern Ireland)

“I think there is just as much transported at night as through the day - if you go down the motorways at night there are a lot of lorries.” (Empty Nester / SINK/DINK, Northern Ireland)

The second main associations with freight related to **safety issues** connected with road freight, and in particular lorries were singled out as a particular concern. Cyclists and motorway users tended to be first to voice concerns about lorries, and were concerned about two issues in particular.

- Firstly, there was concern that both lorry drivers and other road users need to be especially aware of the limitations of lorries and drive accordingly. Car users mentioned how they have to take account of a number of factors when sharing the roads with lorries, including limited visibility, blind spots, and tired drivers who may be falling asleep at the wheel, and so on
- Secondly, there was the issue of lorries intimidating other road users. Lorries were blamed for poor driving practices, particularly on motorways, and for causing accidents. They were also blamed for damage to roads and bridges.

"I don't feel comfortable driving with big lorries on the road." (Family, ABC1, West Midlands, England)

Getting stuck on the motorway behind one of these huge lorries, or what my husband hates is missing the turning because one of these trucks is in the way of the signs." (Empty Nester / SINK/DINK, ABC1, Scotland)

"They come up right behind you and then pull out." (Family, ABC1 West Midlands, England)

"When these big lorries shoot past you it just about knocks you off your bike – it can be quite dangerous". (Empty Nester / SINK/DINK, ABC1, Scotland)

"You just have to give them a lot more space." (Empty Nester / SINK/DINK, Northern Ireland)

Safety concerns were exacerbated by worries about the presence of **foreign lorry drivers** in the UK. People raised a number of issues around foreign drivers, including poor vehicle design with large blind spots, inferior MOT standards, a lack of knowledge of the UK Highway Code, inferior driving tests/skills, and a failure to be compliant with UK rules for rest stops (eg four hour rule). Parents tended to be much more conscious of issues to do with safety, while younger people tended to be more forgiving and were keen not to scapegoat the freight industry.

"They don't follow the Highway Code... I watched someone on the M6 go straight across all the chevrons." (Family, ABC1, West Midlands, England)

"Drivers in the UK are a lot more safety conscious. They have to stop at certain times whereas when they drive abroad they do what they want... there's no regulation." (Family, ABC1, South West England)

"It's a guy who comes across from Poland and comes all the way here and doesn't see his family and he needs that job and he suddenly can't do it

because of all the rules we have imposed.” (Family, ABC1, West Midlands, England)

“It’s got to happen so I’m neutral... if I’m on the motorway then I’m maybe negative”. (Family, ABC1, West Midlands, England)

“A number of accidents on the A14 caused due to foreign truckers.” (Empty Nestwe / Older SINK/DINK, ABC1, East of England)

Safety concerns also extended to smaller delivery vans in towns, which were felt to create some problems. A number of respondents were concerned about very young and inexperienced drivers with no additional training acting inconsiderately on the roads and adding to congestion.

Environmental ‘green’ concerns and worries about pollution were also very widely discussed – however they tended to be perceived as somewhat less serious than congestion and safety. Interestingly, there was considerable uncertainty about which modes were the biggest emitters of CO₂. Some felt road freight was the biggest emitter because there were more vehicles, others felt sea freight must emit more because of the distances involved, and others thought air freight must be the largest emitter because it was frequently discussed in the media. Part of the confusion amongst the public as to how ‘green’ sea freight is, was due to concerns about pollution due to oil spillage. Rail was viewed as the ‘greener’ option, and as an important way to minimise road freight. However, people reasoned that rail would only help ease road congestion slightly, as there would still be a need to transport goods to and from the rail station.

“I don’t think we know about the pollution thing... I don’t think they are feeding us everything they know” (SINKS/DINKS, ABC1, London, England)

“I never would have thought sea and ships but I read something recently that said 16 ships is equal to the car emissions in one day.” (SINKS/DINKS, ABC1, London, England)

“There was some article I read. A boat or a ship produces more pollution than all the cars – all the cars in the world. Maybe it is two

or three ships – You would think it would be greener – but it doesn't appear it is!". (Empty Nester / SINK/DINK, Northern Ireland)

The picture was more clear-cut in the quantitative research. Three in five respondents (61%) thought that road freight, and around one-third (30%) thought that air freight had the highest carbon emissions. Only a small minority opted for sea (2%) or rail freight (2%).

In the qualitative research, when thinking about how green road freight is, it was clear that participants were taking into account not only the carbon emissions but also pollution such as dirty exhaust fumes as well as other factors such as whether the delivery vehicles were clean/unclean.

It was felt that there was considerable variation in how individual road haulage firms dealt with pollution and vehicle cleanliness. There was recognition that the larger 'reputable' companies like Eddie Stobart, Parcelforce, UPS and the supermarkets were probably much better in this regard, but there was concern that smaller operators, and particularly foreign vehicles were much less concerned. When asked how could people tell whether a lorry was polluting or not, a number expressed the view that if the outside of the vehicle was clean, then it was probably well maintained, owned by a responsible company, possibly more modern, and as a result was probably polluting less.

"If the company wash their lorries and make them look good – then there is a fair chance that they are also making sure that the lorry is greener." (Empty Nester / SINK/DINK, ABC1, Scotland)

Noise pollution was mentioned by very few of those consulted in the groups as a particular concern. One or two lived near busy motorways and had suffered with the general noise of the traffic, and despite the lorries being very loud did agree that it was their choice to live so close to a motorway, and not an issue solely attributable to the freight industry.

5 Promoting the value of freight

A key objective of this research was to gain insight about communications and/or marketing interventions that are likely to engage the general public in freight. The following chapter will explore:

- the context for communication – what contextual issues FTA should consider when communicating with the public
- priority issues for the freight industry – key priorities for the logistics and freight industry to consider
- information and education needs – gauging key interest areas

5.1 The context for communication

The logistics sector is intrinsically linked to a number of strong, emotive issues, which emerged throughout this research. Some of these issues are very serious and are currently very topical, and as such had the power to affect views on the logistics industry itself.

These issues included:

- consumerism
- globalisation (the global versus local debate)
- the decline of manufacturing in the UK
- carbon emissions (product carbon footprints)
- road-building damage and the preservation of green spaces
- changing consumer habits (eg online shopping/home deliveries)
- illegal goods smuggling
- stowaways

“You hear about carrots coming in from other countries when we could be growing our own, it means we’re not supporting our farmers” (Empty Nester / SINK/DINK, C2DE, Yorkshire and Humberside, England)

“You come down the fens and every second field isn’t growing because ...they’re getting it all in from overseas.” (Empty Nester/ Older SINK/DINK, ABC1, East of England)

“Unfortunately it’s coming into this country rather than us supplying our own... everything you read it’s made in China.” (Empty Nester / SINK/DINK, C2DE, Yorkshire and Humberside, England)

“Some of the motorways have damaged the countryside” (Family, C2DE, North West England)

“Everyone gets home deliveries now but is this good for the environment?” (Empty Nester / SINK/DINK, Northern Ireland)

All of these factors implicitly affect public views, and many of these debates tainted their opinions when discussing the logistics industry. Whilst it was recognised that issues such as these were not solely the logistic industry’s responsibility to deal with, it was often expected that the industry should outline measures they have implemented to address and acknowledge these concerns.

This should be considered in any future public information campaign undertaken by the industry.

5.2 Priority issues for the logistics and freight industry

The qualitative research indicated that the three main public concerns (congestion, safety and the environment) were all considered to be important priorities for the logistics industry to address.

The omnibus survey was used to identify respondents’ views about the issues the logistics and freight industry should address. The results are presented at Figure 4 and broadly confirm the findings from the discussion groups. Improving safety on the roads was felt to be a strong priority by four in five (83%) respondents, just over three-quarters considered easing congestion (77%) and increasing the use of alternative modes to road (77%) were priorities. And just under three-quarters (74%) indicated that reducing the sector’s impact on climate change (74%) was a priority.

Figure 4: (%)

<i>The logistics and freight industry should address as their number one priority...</i>	NET: Agree	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly disagree	Don't Know
Improving safety on the roads and motorways and reducing accidents generally	83	29	54	10	4	1	5
Easing congestion on the roads and motorways during the day	77	24	54	13	5	1	3
Increasing the use of modes alternative to road, including rail, canals and coastal shipping	77	23	53	14	5	1	4
Reducing the sectors impact on climate change	74	21	53	16	5	1	3

Base: 2,116

The survey respondents were then asked to say whether they agreed or disagreed with the statement “*It is important to reduce freight in order to reduce the impact of climate change despite a resulting small increase in the price of goods*”. Over half (57%) of those interviewed indicated that they were happy to accept a small increase in the price of goods (though they were not asked to specify how much they would be willing to pay). Less than one in five (18%) disagreed with this statement.

5.3 Information and education needs

Most participants in the group discussions were neutral to discovering more about the operations of the logistics sector (particularly the less engaged younger people, urban dwellers and non drivers). There was a strong message that most would be happy for the industry to carry on in a ‘behind-the-scenes’ role.

Many people were not receptive to the idea that they would be the target of an information campaign. Indeed for some, the idea that the industry would want to communicate with them out of the blue highlighted a feeling of cynicism that they had some damage they needed to control.

However, there was some appetite to have communications tackling **current myths, misconceptions** and **allaying current public concerns** with the sector. Some potential areas to education are outlined below.

5.3.1 Outlining the benefits of freight more tangibly

As outlined throughout this report, the public rarely think about the benefits of freight and often take it for granted. Respondents found it difficult to reflect on the benefits of freight and the logistics sector until asked to think about what the country would be like if there was less or no freight.

The core benefits of **convenience**, **reliability** and **variety/choice** that the logistics sector affords consumers were seen very positively, and it may improve public perceptions of freight if these benefits were strengthened in the consumer mind.

5.3.2 Providing greater public confidence in the safety of road freight

As discussed in previous chapters, people's perceptions of the freight industry were firmly rooted in their views about negative practices in road freight. However, there were a number of positive actions being taken by some companies to create a sense of warmth and professionalism around their road fleets that was having a beneficial impact on views.

A gold standard of the industry, repeatedly mentioned throughout the research, was the professional conduct of Eddie Stobart. People referred with warmth to the clean vehicles, the professionalism of the drivers (all wear uniforms) and the friendliness of its brand image (eg naming vehicles creates a warmth and humour to the brand).

"The cabs are clean and the drivers wear a tie and it's family friendly with the names on the back of the cab." (Empty Nester / SINK/DINK, C2DE, Yorkshire and Humberside, England)

"My kids love spotting Eddie Stobart... Haven't you heard of Eddie Stobart? Where have you been?" (Family, ABC1, West Midlands, England)

Reference was also made to the differences between immaculately clean supermarket lorries as opposed to the unbranded, dirty, and somewhat mysterious, foreign language vehicles. The cleanliness and appearance of vehicles and drivers positively affected perceptions about maintenance and safety, and environmental friendliness. Using these ambassadors for the industry may be a powerful marketing tool.

Foreign drivers are a significant issue for the British public who worry about standards that do not meet UK regulations. Reassurance on measures taken by the industry to ensure that all road logistics personnel are approved for UK travel would help to allay some concerns. Domestic lorry drivers also receive a proportion of the blame: most drivers in the group discussions were able to recall situations of dangerous driving in relation to freight vehicles, especially examples of lorry drivers on the motorway. People were again keen to see this issue addressed more robustly and overtly in the public domain.

5.3.3 Addressing local issues

Particularly amongst participants in those groups that had stronger views about the industry, and those within rural areas near a motorway, there were a number of local issues emerging, particularly around local congestion and road safety.

For example, in Huntingdon, a rural part of the UK, people highlighted that travelling East/West on the roads was difficult as opposed to using the more established North/South networks. The result of this was an increased reliance upon the local B roads as transport networks, which often disturbed rural areas. As these roads came under stress and damaged, local people responded by saying that more restrictions should be placed on lorries travelling through these parts of the UK.

“I’d like to see some more width restrictions on these minor roads. There’s no doubt that some of these lorries are just not fit for purpose on these minor roads”. (Empty Nester / SINK/DINK, ABC1, East of England)

In Ashford people were concerned about what they referred to as ‘Operation Stack’ which involved the parking of thousands of lorries on the M20 in Kent due to blockages at the ferry terminals.

“The motorways can be backed up for miles and it can really stop you travelling” (Pre family / SINK/DINK, C2DE, South East England)

Many felt that the freight industry does not care about localised issues, as they are unaware of them getting involved to tackle the situation. A number felt that it could

benefit the industry if they were seen to work more closely with local authority road planning departments to tackle congestion and disturbance to local people.

5.3.4 Measures to counteract environmental impact

The public consider they are bombarded by messages about being eco-friendly, and so it is no surprise that they would be receptive to messages which reassured that the freight industry was taking steps to reduce its carbon footprint wherever possible. Indeed some people specifically buy products with low carbon footprints, and it is likely that the environmental impact of the freight transportation will be increasingly salient to the general public in the future.

People were interested to learn in particular

- how journeys were being maximised by the freight industry (vehicles always carrying a full load)
- how unnecessary journeys were being minimised
- the impact of home delivery and buying locally on the environment

“When I buy on the internet they are delivered by a man in a car – he won’t leave anything with a neighbour and has to come back until I am in – all those extra journeys are such a waste.” (Empty Nester / SINK/DINK, Northern Ireland)

“QVC have couriers – and often they are individuals driving around in cars. There are more cars then.” (Empty Nester / SINK/DINK, Northern Ireland)

6 Conclusions and recommendations

- This research has revealed the extent to which the logistics industry is taken for granted by the public. Few had consciously considered the industry before taking part in the research and yet, on reflection, they recognised that the industry was responsible for delivering the commodities that feature prominently in their lives
- It will be important to consider how the industry is positioned to the public if future marketing is going to take place. The term 'freight' was deemed to be too specialist and industrial to warrant their attention. 'Distribution' followed closely by 'logistics' was felt to be the best and most pleasing way to describe the industry because these descriptors hinted at the network of logistics that allow goods to be moved around and transported so that everything works as it should do
- A key finding of this research was the extent to which road freight was used as the lens through which the freight industry as a whole was considered and assessed. Feelings towards the industry tended to stem from the public's negative experiences with road freight. A focus on road freight therefore seems logical when attempting to combat negative perceptions of the industry
- Congestion, road safety concerns (particularly concerning lorries) and pollution were felt to be the top three public anxieties about the logistics sector. Priorities for improvement in the future were improving safety on the roads, easing the congestion caused by road freight and, wherever possible, reducing the sector's impact on climate change
- There was little desire for new information about freight and the logistics industry. There was a sense that the current perception of freight as a 'necessary evil' will continue should no marketing interventions take place
- A prominent communications campaign informing the public about freight, may stimulate some cynicism about why the logistics industry is seeking to communicate with the public. People were curious as to why a

communications campaign would be necessary. They felt spontaneous communication may cause the industry to look defensive and inadvertently highlight some negative aspects of the industry in so doing

- Nevertheless there seemed value in outlining the benefits of freight more tangibly, providing greater confidence in the safety of road freight, targeting local issues and communicating measures to counteract environmental impact. However, there needs to be careful consideration as to how this information is conveyed
- Perhaps a more localised, quiet, below-the-line and targeted approach would seek to slowly educate the public about the benefits of freight would be the most appropriate strategy without the risk of mass exposure

Appendix A: Discussion Guide

Project Eagle: Focus Group Discussion Guide

1 December 2009 - 90 minutes, version 3 - Final revised

Research aim and objectives

The overall aim will be to understand the views and opinions of the general public towards the logistics sector

More specifically, the research objectives are to:

- establish levels of awareness and knowledge amongst the public of the logistics sector
 - What do people know and how (sources of information) and where are the knowledge gaps?
 - What are the myths and misconceptions surrounding the sector?
 - Which modes of freight are more top of mind and why ?
- explore current perceptions in relation to freight (positive and negative) and understand what has influenced these perceptions
- explore which aspects of freight across modes and topics (safety, environmental, congestion) are most unappealing, and why?
- exploration of the benefits of freight – which aspects of freight are perceived as more important, and why?
- to gain insight about communications and/or marketing interventions that are likely to engage the general public in freight

Introduction and warm up

5 mins

- Introduce moderator
- Purpose of the research
 - *Moderator to explain that the purpose of this evening is to discuss transport and some specific areas within this topic*
- MRS Code of Conduct - Confidentiality / Recording / Anonymity
- House rules
- Any questions?

- **Warm up: Name, family situation, , how long they've lived in the area, other places they've lived, commute to work (mode and time)**

Awareness and understanding of freight

25 mins

The purpose of this section is to explore levels of awareness amongst the public of the logistics sector, current perceptions in relation to freight and understand what has influenced these perceptions.

- When I say 'freight', what words and pictures come to mind? (*Capture on cards / flip chart and explore in detail*)
- **STIMULUS 1: Moderator to show a definition of freight**
 - Does this definition fit with what you had initially thought? Why / why not?
- What do you know about freight / what have you heard about freight? (*Probe other people, local stories, media coverage etc*)
- Where do you get most of your information about freight from / where else?
- Probe different sources (word of mouth, observation, written media, TV, radio, internet etc)
- What would you say are the main messages that come from these different sources?
- Which sources do you trust most, and why?
- What things are you unsure about when it comes to freight? What questions do you have?
- In what ways is freight important / to whom and why?
- **How do you feel about freight? Positive, negative, neutral? Why?**
- What does the average person know about freight?
- How much information is there about freight?

Exploring views towards the freight process**15 mins**

The purpose of this section is to explore views on the freight process, commodities being delivered and to explore the public's views of the different modes of freight.

Freight modes

- What modes of freight dominate in your mind?
- Which modes of freight do you think are more prevalent / important and why?
- What do you think is the proportion of freight sent via the different modes and why?

STIMULUS 2: Moderator to show the different modes of freight

- Does anything surprise you here?
- Probe views on non-lorry road freight – such as smaller vans delivering internet shopping, parcels direct
- What are your perceptions of the five types of freight? What associations do you have with these different types of commodity transportation? Explore what's good / bad about each of them
 - Air / Rail / Road lorries / Road – small vans / Train / Sea
- Which type of freight is better and worse and why?
- Have you heard about more than one carrier being used? (Intermodal freight transport)
 - What are your views on this?

Logistics process

- How do you imagine the 'freight process' works?
 - What happens?
 - Who is involved?
- What freight companies have you heard of? What have you heard about them? (Probe: what about the big supermarkets?)

STIMULUS 3: The Process - Moderator to show the freight process in practice (How an MP3 gets from China to the UK example?)

- What are your views on this process of freight transportation?
- Were there any surprises here?
- Have these examples raised any questions in your mind about freight?

Commodities

- What commodities (goods) come to mind that are transported by freight?
- Are there any commodities you are unsure are counted as freight? Why? (Probe for Mail, Couriers, Amazon deliveries, Emergency Services, livestock)
- Does the type of good being transported alter your attitudes in any way towards freight?

STIMULUS 4: Freight commodities scatter chart and chart showing different sectors

- Which do you associate more / less with freight – considered versus not considered?
- Which are more important and why (ranking)?
- Do any of these commodities make you feel more / less positive about freight?
- For what commodities is freight essential?
- Would you want to give up any goods to try and have less freight being transported through the country?

The implications of freight

15 mins

The purpose of this section is to explore the positive and negative implications of freight in more detail.

- Having learned a bit more about freight and the freight process, have your views changed at all?
- What things about freight do you think benefit us as a nation?
- What do you think the freight companies should tell us to educate us more about the positive aspects of freight?

Now, knowing a bit more about freight...

- What are the benefits of freight? (to you versus to anyone)
- What are all the drawbacks of freight? (to you versus to anyone)

Moderator to capture positive and negative aspects of freight on shuffle cards. STIMULUS 5: Introduce the additional positives and negative ideas if necessary.

- Are any of these benefits / drawbacks more relevant to people living in any particular regions of the UK / particular people?
- Can these be grouped into key issues?

- Are there any solutions to the drawbacks?
- Can we rank in order of importance and why this order?
- What is the impact of freight on the economy?
- What is the impact of freight on society?
- What is the impact of freight on the environment? How do you think we should try to limit this?
- What is the impact of freight on public safety?
- What would life be like without freight? How would it improve / get worse?
- What things would we miss out on without freight? (*Respondents to complete bubble chart... Life without freight would be.....*)

STIMULUS 6: If necessary and if issues not already arisen then moderator to introduce case studies / newspaper articles, PR coverage or statistics illustrating benefits or drawbacks to stimulate further debate.

- Which of these negatives can you relate to / are most detrimental to the image of freight and why

Explore views in relation to these alternative points of view

- Do they change your views at all towards freight?
- Why / why not?
- What would your response be to these media claims?

Activity: promoting the value of freight

20 mins

The aim of this section is to gain insight about what messages / interventions are likely to engage the public in freight.

Moderator to explain that the purpose of this section is to help develop a campaign for the freight industry that will help people to think more positively about freight. Explain that we would like the group to think about how freight can be presented in the best possible light to people in the future. Both groups to look at:

- 1 *Any changes that should happen to the way the freight process works to make people feel more positively about freight.*
- 2 *What should be said to tell the general public about the importance and benefits of freight?*

- 3 *Who would be most credible to talk about the positives of freight to you? Who would you listen to / trust most?*

Each group to feedback on their thoughts (five minutes for each group)

- Has anyone heard of the FTA? What have you heard? Read out:

The FTA are a trade association. In the twenty-first century FTA is one of the largest trade associations in the UK representing the transport interests of some 12,000 companies. FTA members operate over 200,000 lorries and around one million light vans; they consign over 90 per cent of the freight moved by rail; and they are responsible for over 70 per cent of UK visible exports by sea and air.

- Who should positive messages about freight come from? The FTA, government, anyone else and why

Summary (time permitting)

5 mins

- Overall, what do you think about freight? What are the good and the bad things?
- What things surprised you the most?
- What will be the one thing you will tell others about when you leave tonight?
- Any last pieces of advice for freight companies about how they could engage the public more and get them on their side
- Any questions for us?

THANK AND CLOSE

Appendix B: Omnibus Survey

**Freight Omnibus Survey
TNS Consumer Omnibus
25/1/09- FINAL version**

1 Do you do any of the following...

...Drive a car at least once a week

...Use a car (either as a driver or a passenger) at least once a week to commute to work

...Use a car (either as a driver or a passenger) at least once a week to take children to school

...Use a car (either as a driver or a passenger) at least once a month to travel long distances on motorways

...Ride a bicycle or a motorcycle at least once a month

01: Yes

02: No

SHOW SCREEN AND READ OUT

The following description is for an industry or sector within the UK economy

"The movement of goods and services as efficiently as possible in order to meet customer demand. The industry can be broken down into the following main categories.

- * Road transport
 - Rail transport
- * Air transport
- * Sea transport (ie container shipping, canal barges, tankers etc)

The industry includes those who purchase transport for goods and services and those who run their own fleet of commercial vehicles. In addition the storage (warehousing) and handling of goods is also included in this sector"

INTERVIEWER: TAP OKAY TO CONTINUE

Q2 Thinking about the description we have just seen, which of these words do you feel....

SHOW SCREEN

...best describes it

01: Logistics

02: Freight

03: Haulage

04: Supply Chain

05: Distribution

(DK)

Q2b And again thinking about this description which of these words do you feel...

SHOW SCREEN

...is the most positive or pleasing word to describe it?

(List as Q2a).

READ OUT

For the remainder of these questions we will refer to the industry which has just been described as 'logistics and freight'.

SHOW SCREEN

Q3 Considering transport for goods consumed in the UK, which of the following freight transport modes do you think has the highest level of carbon emissions?

01: Rail

02: Sea

03: Road

04:Air

DK

SHOW SCREEN

Q4a How important would you say the logistics and freight industry is to you and your everyday life?

01: Extremely important

02: Very important

03: Fairly important

04: Not very important

05: Not at all important.

(DK)

Q4b Please state how important you consider each of the following:

The logistics and freight industry...

(scripter: please show above statement for each statement below)

SHOW SCREEN

...Is a large employer of people in the UK

...Contributes significantly to the UK economy

...Allows me access to a wide range of product choices

...Can help to support the economy of developing countries

...Transports food and drink

...Transports medical supplies, drugs and hospital equipment

...Supports local community services, eg waste collection, meals on wheels

(List as at Q4a)

Q5 Please tell me how much you agree or disagree with the following statements...

The logistics and freight industry should address as their No. 1 priority...

(scripter: please show above statement for each statement below)

SHOW SCREEN

...Reducing the sector's impact on climate change

...Easing congestion on the roads and motorways during the day

...Improving safety on the roads and motorways and reducing accidents generally

...Increasing the use of modes alternative to road, including rail, canals and coastal shipping

01: Strongly agree

02: Agree

03: Neither agree nor disagree

04: Disagree

05: Strongly disagree

(DK)

Q6 Please tell me how much you agree or disagree with the following statements related to logistics and freight...

It is important to...

SHOW SCREEN

... Increase night time freight to ease daytime congestion despite a degree of increased night time noise

... Build more roads to ease road congestion

... Reduce freight in order to reduce the impact on climate change despite a resulting small increase in the price of goods.

01: Strongly agree

02: Agree

03: Neither agree nor disagree

04: Disagree

05: Strongly disagree

(DK)

Appendix C: Technical Appendix

The information in the following tables are required to comply with ISO 20252. These can be completed as a technical appendix.

6.1 Qualitative research

Client	<ul style="list-style-type: none"> • Freight Transport Association
Conducted by	<ul style="list-style-type: none"> • TNS-BMRB Ltd
Objectives	<ul style="list-style-type: none"> • At page 3-4
Universe	<ul style="list-style-type: none"> • UK residents 16+
Sample size	<ul style="list-style-type: none"> • 12 focus groups
Fieldwork period	<ul style="list-style-type: none"> • 30th November 2009 – 9th December 2010
Method	<ul style="list-style-type: none"> • 12 x 90 minute focus groups
Recruitment	<ul style="list-style-type: none"> • Free-find
Incentives	<ul style="list-style-type: none"> • £35
Interviewers	<ul style="list-style-type: none"> • Lucy Evans, Claire Hunter, Douglas Dalziel, Nicolas Fitzgerald
Interviewer validation	<ul style="list-style-type: none"> • 100% validated
Questionnaire	<ul style="list-style-type: none"> • At Appendix A
Analysis	<ul style="list-style-type: none"> • Please note that the results of this qualitative research are indicative and cannot be projected onto the overall population

6.2 Quantitative research

Client	<ul style="list-style-type: none"> • Freight Transport Association (FTA)
Conducted by	<ul style="list-style-type: none"> • TNS-BMRB (using TNS Omnibus)
Objectives	<ul style="list-style-type: none"> • As described in the report
Universe	<ul style="list-style-type: none"> • UK Adults aged 16 or older
Sample size	<ul style="list-style-type: none"> • 2,116
Fieldwork period	<ul style="list-style-type: none"> • 27 January 2010 – 31 January 2010
Sampling method	<ul style="list-style-type: none"> • The TNS Omnibus uses a random location sampling approach and quotas
Data collection	<ul style="list-style-type: none"> • Face to Face (CAPI)
Incentives	<ul style="list-style-type: none"> • n/a
Interviewers	<ul style="list-style-type: none"> • c.150
Interviewer validation	<ul style="list-style-type: none"> • A minimum of 10% of interviews are checked on every survey. Verification is carried out at TNS' head office, mainly on the telephone, by trained validators. Interviewer assignments are systematically selected
Questionnaire	<ul style="list-style-type: none"> • The full questionnaire can be found in the appendix
Analysis	<ul style="list-style-type: none"> • Weighting has been applied to ensure the sample is representative of the UK population as a whole. Factors used in the weighting matrix are region, gender, age and social grade • Where analysis by sub group has been applied the base figures have been quoted in the text



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