



PUBLISHED PROJECT REPORT PPR778

Understanding HGV regulatory non-compliance in London

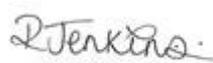
Full report

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Executive Summary

Background

The people and businesses of London rely heavily on the efficient movement of goods by HGVs. Improving the safety of heavy goods vehicles (HGVs) on London's roads is a key priority in the ongoing mission to create safer and more efficient deliveries across London whilst reducing the incidence of collisions between HGVs and vulnerable road users (VRUs). The recent and ongoing construction activities in London are highly dependent on deliveries and waste removal. London has enhanced rules and restrictions compared with the rest of UK (e.g. Low Emission Zones, congestion charges, London Lorry Control Scheme (excluded and restricted roads, restricted times), Safer Lorry Scheme (from September 2015), parking/loading restrictions) to ensure that vehicles and operators entering the city adhere to required standards. Enhanced contractual requirements are also common in London.

It has been well-documented that competition for road space and levels of vulnerable road users in London are high, with walking and cycling actively encouraged. Cycling levels in London have continued to grow, with 16% of the city's traffic being accounted for by bicycles in 2014. Walking is also more common in London than any other region of England, with walking trips increasing by 64% from 2006/7 to 2012/13.

The presence of HGVs and the increased popularity of cycling and walking have resulted in conflict on London's roads. In 2013, nine of the 14 cyclist deaths in London involved an HGV; between 2008 and 2013, large commercial vehicles made up 4% of traffic but were involved in 55% of cyclist deaths in London.

The improvement of VRU safety in London is a key priority for TfL, and a principal approach to achieving this is to tackle dangerous, non-compliant HGVs. There is currently a lack of research or evidence aimed at explaining *why* non-compliance occurs. By gaining a better knowledge and understanding of the reasons behind regulatory non-compliance amongst HGV operators and drivers, evidence-based and targeted recommendations for increasing compliance can be proposed.

Objectives

The project addressed the following research objectives:

1. Determine the levels of non-compliance of UK and non-UK based HGVs, drivers and operators within London
2. Determine the levels of non-compliance of HGV operations in London
3. Establish which sectors are over-represented in non-compliance of HGV operations in London
4. Define specific reasons and motivations for non-compliance of HGV operations in London
5. Make recommendations to be adopted by relevant organisations, to increase the levels of compliance within HGV operations in London

Methods

In order to meet the objectives, a multi-method approach was employed:

- A review of the existing literature relating to HGV regulatory non-compliance, with a view to determining what is and is not known about non-compliant operations in London
- An analysis of the targeted roadside enforcement data gathered by the Metropolitan Police Service's Commercial Vehicles Unit (CVU) and the Industrial HGV Task Force (IHTF) to identify at-risk sectors and profile common non-compliant operator types. Collision data from the national database of road collisions involving personal injury reported to the police (Stats19) was also examined
- An analysis of non-targeted roadside inspection data gathered by the Metropolitan Police Service and the City of London Police specifically for this project
- A quantitative survey of drivers, managers, owners and clients to explore perceptions of non-compliance, motivations for non-compliance, and suggestions for improving compliance
- A series of qualitative interviews with 69 individuals representing drivers, managers, owners, clients, Traffic Commissioners and those involved in enforcement and regulation to improve the understanding about *why* HGV operations do not always comply with regulations, with a particular focus on London

Findings

Nine key findings emerged from the research.

Finding 1: Current levels of non-compliance – even with fundamental laws – are unacceptably high

Non-compliance with fundamental road safety laws related to speeding, using a handheld device, and not wearing a seatbelt were reported as being very common. High levels of non-compliance with other general and HGV-specific road rules were also reported. This finding suggests a culture of acceptance of these behaviours among drivers, and a lack of responsibility or ability to prevent these behaviours among managers. The high level of non-compliance even in the non-targeted stops backs up this conclusion. HGV regulatory non-compliance is motivated by a number of factors. These include (but are not limited to): a lack of understanding or knowledge of how to achieve full compliance; the feeling that non-compliance is necessary due to the quantity of rules and regulations; the perception that penalties are not severe enough; and an attempt to improve personal or organisational profit.

Finding 2: The term 'non-compliance' holds different meanings for different people

The term 'non-compliance' means different things to different people. Typically, when talking about non-compliance, drivers tended to focus on HGV-specific rules and regulations or general driving rules. Managers and owners tended to focus on operator licence requirements, driver rules and vehicle maintenance when they were asked about

non-compliant activities. Clients tended to interpret non-compliance as being in relation to deliveries or contractual requirements such as those specified by FORs or Crossrail.

Finding 3: Views held by drivers and management differ in many ways, particularly: (a) perceived levels of non-compliance (compared with management, drivers report lower levels) and (b) self-reported knowledge and attitudes towards non-compliance

There was a strong belief amongst interviewees that those with a restricted operator's licence are more likely to be non-compliant, either through lack of knowledge or because HGVs represent an ancillary part of their business. In terms of the activities and vehicles most strongly associated with non-compliance, skip wagons, scaffolding, and tipper vehicles were frequently referred to.

Finding 4: Operators with restricted licences are perceived to be, and appear to be, more likely to be non-compliant

Very few significant differences were found in survey responses between sectors and licence types, however, many differences were found between roles (comparing drivers to managers/owners and, where possible, clients). Significant differences related to: reported levels of different types of non-compliance, attitudes towards non-compliance and knowledge of non-compliance. The non-targeted stops undertaken do suggest that restricted licence holders have higher levels of non-compliance, although these data do need to be treated with caution as they were never intended to directly compare licence types or sectors.

Finding 5: While the HGV industry as a whole believes that clients do have a role to play in improving compliance, not all clients are engaged with the topic or interested in raising compliance levels; many feel that non-compliance is acceptable, particularly when relating to the delivery of goods

Clients of HGV services represent a range of organisation types and individuals. Some clients (correctly) perceive that they have little influence or control over HGV regulatory compliance. Other clients, however, have far greater potential to be involved in HGV compliance. The industry as a whole believes that the role of all types of clients is key and must be strengthened in the future.

Finding 6: Some penalties for non-compliance are not a deterrent and there are variable views on the likelihood of being subjected to an enforcement check

There was a mixed response on the question of the likelihood of being subject to a compliance check by the DVSA or police, with a high perceived risk of detection amongst most survey respondents and some interviewees, but a low perceived risk among others. There was also a belief amongst a considerable proportion of respondents that drivers and organisations are able to 'get away' with non-compliance. It was generally felt that some current penalties (particularly fixed penalties) are too lenient and that more immediate and harsher penalties are required for non-compliant operators and drivers. It was also felt that increased publicity around enforcement activities and the resulting penalties should be encouraged.

Finding 7: Non-compliant activity observed by those operating in the industry is reported, but not all the time

Non-compliance cannot be tackled effectively if it goes unreported. Reporting of observed non-compliance in individuals' own and other organisations does occur, but

around a fifth of survey respondents stated that they had seen non-compliance in other organisations and not reported it. There is not currently an industry-wide safety culture which enables and supports reporting. This is supported by the finding that three key deterrents to reporting non-compliance are: individuals not knowing how to report non-compliance, the perception that they are not responsible for reporting observed non-compliance, and the lack of time to make reports of non-compliance

Finding 8: There is room for improvement to driver CPC training to ensure it is fit for purpose

The current driver CPC system is seen as beneficial, but with a number of shortcomings; the lack of a formal assessment and the option of attending the same course module multiple times in order to achieve the required number of training hours were two key issues mentioned. A desire was also expressed for more practical and less classroom-based training to be offered.

Finding 9: London presents different challenges to other UK cities, in terms of its operating environment and regulations

London presents a complex operating environment for HGVs both in terms of the physical environment (high levels of traffic, congestion, vulnerable road users; parking is reported to be more difficult) and the regulatory environment (over four fifths of survey respondents felt that compliance with HGV regulations was much harder or a little harder in London than the rest of the UK). Some regulations are seen as outdated or irrelevant, and there was a desire for them to be reviewed and streamlined.

Recommendations

Ten recommendations are made on the basis of the findings. Figure 1 illustrates the connection between the findings and recommendations (bold lines indicate the key recommendation associated with each finding, fainter lines indicate additional recommendations which go some way to addressing each finding). It also illustrates who should take key ownership for each recommendation, in addition to the HGV industry as a whole (i.e. any individual involved in the operation of one or more HGVs).

Recommendation 1: Extend the CLOCS community to include all industries operating HGVs, and with a clear focus on achieving compliance

The existing CLOCS community is working to “revolutionise the management of work related road risk and embed a road safety culture across the industry”. It is currently focused on the construction industry but should continue to expand to include other industries which operate HGVs, both in London and nationally. A clear focus on achieving compliance should be maintained and strengthened; for example a fourth workstream could be included around improving compliance of organisations, drivers and vehicles.

Recommendation 2: Provide a clear definition of what is in the scope of ‘non-compliance’

In order to improve communication about non-compliance and encourage observed incidences of non-compliance to be reported, a clear definition of what constitutes ‘non-compliance’ is required (including vehicle, driver, contractual and road law). Once established, this definition should be widely publicised and organisations should be encouraged to ensure that it is disseminated to drivers and clients. The definition should include road laws such as keeping within posted speed limits, and wearing seat belts.

Recommendation 3: Ensure clear guidance for the HGV industry on compliance is available in one central repository, and is disseminated throughout the industry

In combination with Recommendation 1, it is crucial that individuals involved in the HGV industry have easily accessible, clear, simple guidance on how to achieve compliance, particularly in London. This can include information and toolkits on key issues (e.g. how to ensure compliance, how to report non-compliance) and should be aimed at drivers, managers, owners and clients of organisations operating HGVs. The guidance should be collated into a central, easily navigable repository, and should be clearly signposted when operator licences are issued. The contents of any existing guidance aimed at the HGV industry, and the way it is currently disseminated, should also be reviewed. The review should ensure that clear guidance is available for every aspect of compliance, and should assign responsibility to the relevant agencies for dissemination of the information amongst drivers, managers, owners and clients.

Recommendation 4: Put in place mandatory training for restricted operator licence holders and/or transport managers

Holders of restricted operator's licences are not currently required to undergo any training or to prove their knowledge and understanding of the licence requirements, and the current optional nature of training for this group results in a range of knowledge on compliance amongst those operating vehicles on a restricted licence. Mandatory training similar to that currently required of transport managers holding a CPC for a standard operator's licence is required to ensure that all operator's licence holders or transport managers have the same baseline knowledge of understanding of their responsibilities, and what they need to do to ensure compliance across their vehicles and drivers.

Recommendation 5: Encourage client involvement in improving compliance through increased publicity of the CLOCS Standard, FORS, the FORS Associate Scheme and TfL Work-Related Road Risk (WRRR) contractual process

The CLOCS Standard for managing work related road risk is a common standard for use by industries operating commercial vehicles which deliver to, collect from or service a project, premises or property. It is intended for use by clients within contracts and covers issues relating to vehicles, drivers and clients. Further promotion and implementation of this standard, particularly among non-construction industries, would benefit safety and compliance. Future iterations of the standard could make it more inclusive of all industries, particularly if CLOCS is extended (see Recommendation 10).

The FORS Associate Scheme is designed to encourage those who 'don't operate commercial vehicles and would like to help drive up standards across the sector' to either 'set FORS' best practice standards and legal compliance at the heart of your freight distribution activities' or 'offer an exclusive discount on your products and services that adds value to the scheme by enabling operators to comply with contractual/legal requirements etc'. Focusing on increased publicity of this scheme amongst clients procuring the services of HGVs across all sectors will encourage client involvement in driving down non-compliance. The public sector should be encouraged to demonstrate leadership, with major public sector organisations becoming FORS Associates and introducing compliance requirements as part of their contracts.

Clients should also be encouraged to consider whether the organisations they contract are FORS accredited, and to what level, since FORS accredited operators are more likely

to be compliant. The existing directory of FORS registered and accredited companies should be updated so that it is easier to search (e.g. allowing a user to search for an operator in a particular sector within 20 miles of a specific postcode, and including contact details).

Recommendation 6: Increase visible enforcement activities and publicity around enforcement

Visible enforcement, at the roadside or at operator premises, is a key means of increasing the real and perceived risk of being checked. Continued high levels of publicity around enforcement activities will also increase the perceived risk, particularly among operators who may go into London less frequently and so not see the enforcement activities first-hand. Such activities could include press releases relating to both hard-hitting and routine cases of enforcement, and will also help to dispel the apparent perception in some quarters of the industry that certain penalties for non-compliance are too lenient. Trade association magazines and websites should be involved in this publicity, as well as methods which would target operators who do not have trade association membership, such as posters at truck stops and adverts placed on online forums for transport managers and drivers.

Recommendation 7: Put in place a readily-accessible reporting system for non-compliance

A unitary anonymous reporting system for reporting non-compliance is required. Based on the findings, this system should make reporting non-compliance quick and easy, should provide clear feedback and results, and should not require any proof in order to make a report. A combination of telephone and internet-based reporting would enable individuals across the HGV industry to have access to the system. A reporting system for London is already in place (Roadsafe London) for members of the public to report criminal, nuisance and anti-social behaviour on London's roads; this could be publicised and expanded so that three key types of report can be made both online and by telephone: reports by members of the public, reports of issues observed in the reporter's own organisation, and reports of issues observed in other organisations. (See also Recommendations 3 and 9.)

Recommendation 8: Undertake internet search engine optimisation to ensure that clear guidance on achieving compliance and reporting non-compliance is readily available

As internet searches were reported by drivers, managers and owners to be a key means of finding information and advice on compliance-related issues (all aspects of compliance including how to achieve compliance and how to report non-compliance), it is important that internet search engines return the most relevant, clear and useful guidance (i.e. the repository of information developed under Recommendation 2). Search engine optimisation of the guidance websites and documents deemed most useful will increase the probability of this guidance being found and used.

Recommendation 9: Review driver CPC training to ensure that it is fit for purpose, and lobby parliament for a change in legislation

Driver CPC training aims to ensure that professional drivers have a good understanding of current legislation and equipment, and to improve road safety. Currently, drivers undergoing periodic training are able to attend the same module a number of times and regardless of how relevant it is to their role. Ideally, the system would be designed such

that drivers must vary the modules that they attend, and ensure that these modules are pertinent to their training needs. Transport managers or other appropriate role holders should be able to conduct a training needs analysis and ensure that the outcome of this analysis is used when selecting CPC modules.

Recommendation 10: Undertake a review of regulations specific to London, with the aim of improving synergy between the various regulations and agencies

The additional regulations and requirements placed on operators in London were felt to contribute to non-compliance (e.g. London Lorry Control Scheme, parking and unloading restrictions, Low Emissions Zones, the soon-to-be-introduced Safer Lorry Scheme). In particular the London Lorry Control Scheme was felt to be outdated and in need of review. A comprehensive review of both regulations and contractual requirements should be conducted, with the aim of combining and streamlining to make them easier to understand and comply with.

Limitations and general considerations for future research

The key limitation of the research related to the lower-than-desired sample of survey respondents achieved, particularly amongst clients and operators holding a restricted licence. This reduced the number of comparative analyses that could be made between sectors and licence types, but importantly it suggests a possible apathy among these groups in relation to influencing and engaging with the future of the HGV industry. The research has identified issues which require action, and future research can further explore and quantify these issues, with the aim of gaining a complete understanding of why non-compliance occurs, and how to eliminate it.

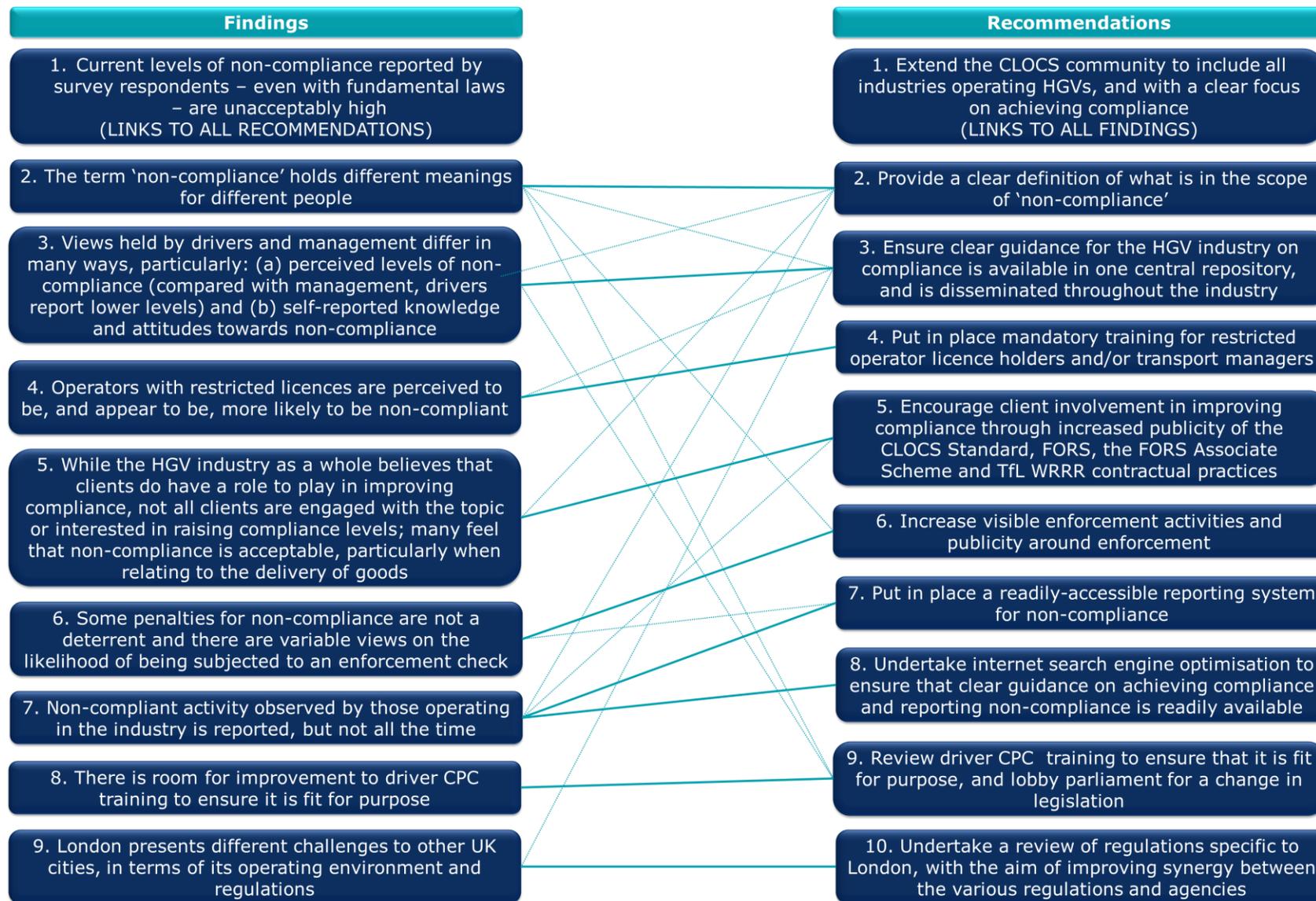


Figure 1. Findings and associated recommendations

Abstract

This research aimed to improve understanding of regulatory non-compliance of HGVs operating in London. The purpose of the research was to determine non-compliance levels, analyse available roadside data, establish which sectors are over-represented in non-compliant operations, and define specific reasons and motivations for non-compliance, so that recommendations based on the findings could be made. In order to respond to these research objectives, five activities were undertaken: a review of relevant literature, analysis of recent data from targeted HGV enforcement stops, non-targeted stops, a quantitative survey of drivers, managers, owners and clients, and interviews with the same individuals plus representatives of enforcement and regulatory agencies and Traffic Commissioners. A number of key findings were produced, including an unacceptably high level of reported and observed non-compliance by HGV operations in London (including with fundamental road safety laws). Additional findings are described, along with recommendations for action to be taken to address these findings.

1 Introduction

1.1 Operating HGVs in London

The people and businesses of London rely heavily on the efficient movement of goods by HGVs¹; in particular the recent and ongoing increase in construction activities depends on deliveries and waste removal. HGV regulations and road laws exist to ensure vehicles and their operators adhere to the same high standards of safety, and London has enhanced rules and restrictions when compared with the rest of the UK (e.g. Low Emission Zones, congestion charges, London Lorry Control Scheme (excluded and restricted roads, restricted times), Safer Lorry Scheme (from September 2015), parking/loading restrictions). To take one example, making and receiving deliveries in London depends on a variety of restrictions and requirements (sub-bullets taken from the TfL website²):

- Operational compliance
 - Operator's licence
 - Abnormal/dangerous load requirements
 - Driver and staff welfare (including drivers' hours regulations)
- Delivery environment restrictions
 - Parking and loading restrictions (Red Routes, yellow lines (pips), loading facility restrictions)
 - Safety restrictions
- London-specific restrictions
 - Low Emission Zone
 - Congestion charge
 - London Lorry Control Scheme

There are also compliance requirements such as operator's licences and abnormal/dangerous load requirements

Enhanced contractual requirements are also common. For example all HGVs contracted to the Crossrail project must be fitted with safety devices including blind spot proximity sensors, side under-run guards and warning alerts for cyclists, and drivers must undergo a training course. Transport operators and sub-contractors working on Crossrail are also required to reach FORS bronze standard within three months of starting a contract.

1.2 HGVs and other road users

Competition for road space in London is high, with walking and cycling actively encouraged. London's 'cycling revolution' has meant continued growth in cycling levels, with bicycles now accounting for 16% of traffic in Central London, and 2014 seeing a new record for cycling on the TfL road network. Walking is more common in London than any other region of England, and the number of walking trips in London is also increasing

¹ For the purposes of this research, an HGV is defined as a vehicle that is of a construction primarily suited for the carriage of goods or burden of any kind and designed or adapted to have a maximum weight exceeding 3,500 kilograms (3.5 tonnes) when in normal use and travelling on a road laden.

² Retrieved May 2015

(for example there was a 64% increase in the number of walk journey stages of at least five minutes in 2012/13 compared with 2006/07) (TfL, 2014a).

The presence of HGVs and the increased popularity of cycling and walking have resulted in conflict on London's roads; in 2013, nine of the 14 cyclist deaths in London involved an HGV and between 2008 and 2013, large commercial vehicles made up 4% of traffic but were involved in 55% of cyclist deaths in London (TfL, 2014b).

1.3 Non-compliance

The improvement of vulnerable road user (VRU) safety in London is a key priority for TfL, and a principal approach to achieving this is to tackle dangerous, non-compliant HGVs. HGV drivers and operators are required to comply with numerous rules and regulations over and above those required of car drivers, whilst navigating London's busy roads and avoiding distractions before making a legal delivery of their goods.

A number of activities are already in place to support a focus on improving the safety of HGVs in London, including:

- Schemes and initiatives such as the Fleet Operator Recognition Scheme (FORS), the CLOCS initiative, action plans for road safety, and the London Freight Plan
- The Industrial HGV Task Force (IHTF)
- Enforcement legislation used by various enforcement agencies
- Licensing rules regulating goods vehicles used to transport goods for hire or reward, or in connection with a trade or business.

Over 4,000 targeted stops of HGVs in London by the IHTF resulted in over 1,000 fixed penalty notices and 2,000 roadworthiness prohibitions being issued to drivers of unsafe or non-compliant HGVs over 16 months from October 2013. Sir Peter Hendy (London's Transport Commissioner) said "...these enforcement results send out a clear message to everyone concerned that we will not tolerate or put other road users, cyclists or pedestrians at risk through the actions of the minority of negligent operators and drivers in the capital" (TfL, 2015). HGV non-compliance with regulations is a known issue in London, but the true level of HGV regulatory non-compliance is not currently known, as the IHTF stops vehicles suspected to be non-compliant or unsafe (and thus provides an overestimate of the true level of compliance in the entire fleet). However, it can be stated that HGVs and drivers who do not comply with regulations, be it habitually and deliberately, or occasionally and accidentally, are a potential risk to vulnerable road users. There is currently a lack of research or evidence aimed at explaining *why* non-compliance occurs. By gaining a better knowledge and understanding of the reasons behind regulatory non-compliance amongst HGV operators and drivers in London, evidence-based and targeted recommendations for increasing compliance in London and elsewhere can be proposed.

1.4 Research objectives

TfL has commissioned this research to improve understanding regulatory non-compliance of HGV operators and drivers in London. The purpose of this study is to address five key objectives, as shown in Figure 2.

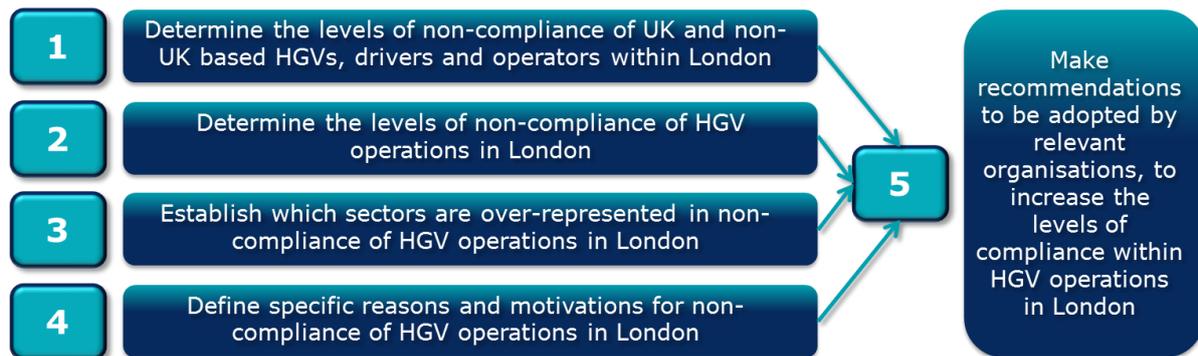


Figure 2. Research objectives

1.5 Report structure

This is the final technical report from this research and describes in full all methods, results and conclusions from the work. A summary report is also published alongside this technical report.

The remaining sections of the report are structured as follows:

- Section 2 describes the research methods used for the literature review, data analysis, survey and interviews
- Section 3 describes the findings from a review of UK and international literature concerning non-compliance
- Section 4 describes the analysis of targeted stop data from CVU and IHTF roadside inspections
- Section 5 describes the analysis of the non-targeted stop data from MPS and CoLP inspections
- Section 5 provides the findings from a quantitative (survey) and qualitative (interviews) exploration of HGV non-compliance in London, aimed to improve current understanding of this subject
- Section 7 draws together and summarises the key findings of the research, and Section 8 provides associated recommendations aimed to improve HGV regulatory compliance in London
- Section 9 describes the limitations of the research

2 Method

A multi-method approach was taken to address the following project objectives:

- Determine the levels of non-compliance of UK and non-UK based HGVs, drivers and operators within London
- Analyse and draw meaningful conclusions from available roadside enforcement data on HGV operations in London
- Establish which sectors of the HGV industry are over-represented in non-compliant HGV operations, with particular attention paid to restricted operator licence holders
- Define specific reasons and motivations for regulatory non-compliance of HGV drivers and operators in London
- Make recommendations based on sound findings that should be adopted by organisations such as TfL, DfT, DVSA, Police, Traffic Commissioners and the road haulage industry, with the objective of increasing the levels of regulatory compliance within HGV operations in London.

Four research tasks were undertaken, with a further task underway at time of publication, as shown in Figure 3.

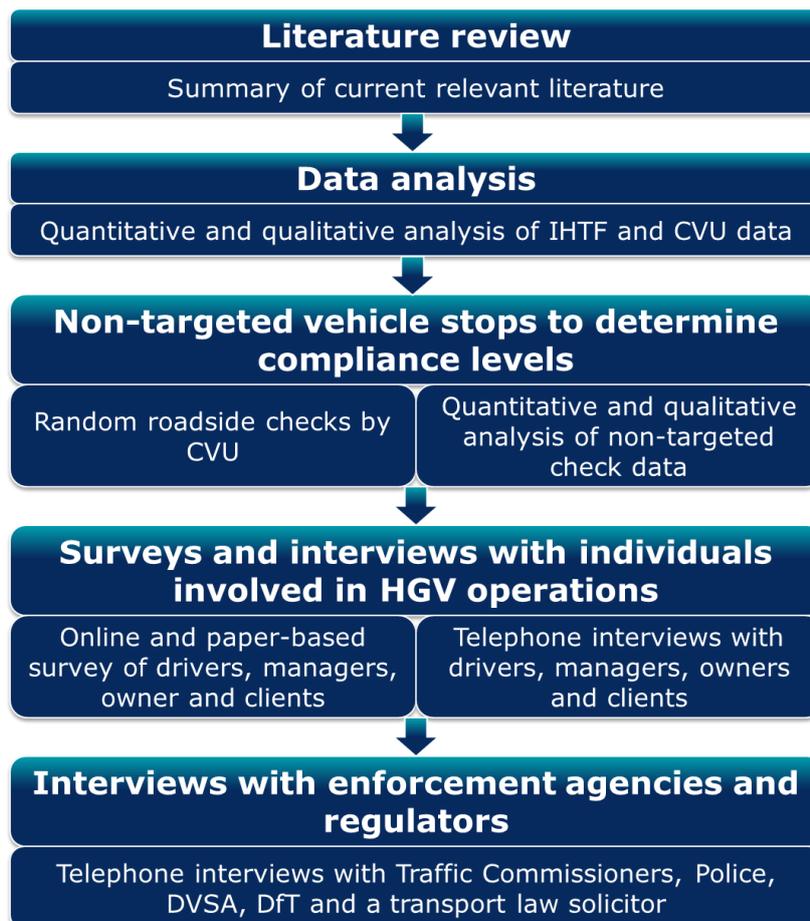


Figure 3. Overview of method

The methods used are described in detail in this section.

2.1 Literature review method

A search of the published literature and various industry materials was conducted to examine and summarise current literature relating to HGV regulatory non-compliance, and to determine what is and is not known in terms of non-compliant operations in London.

A list of search terms was derived from careful consideration of relevant terms associated with areas of compliance and non-compliance in the HGV industry. These are shown in Figure 4.

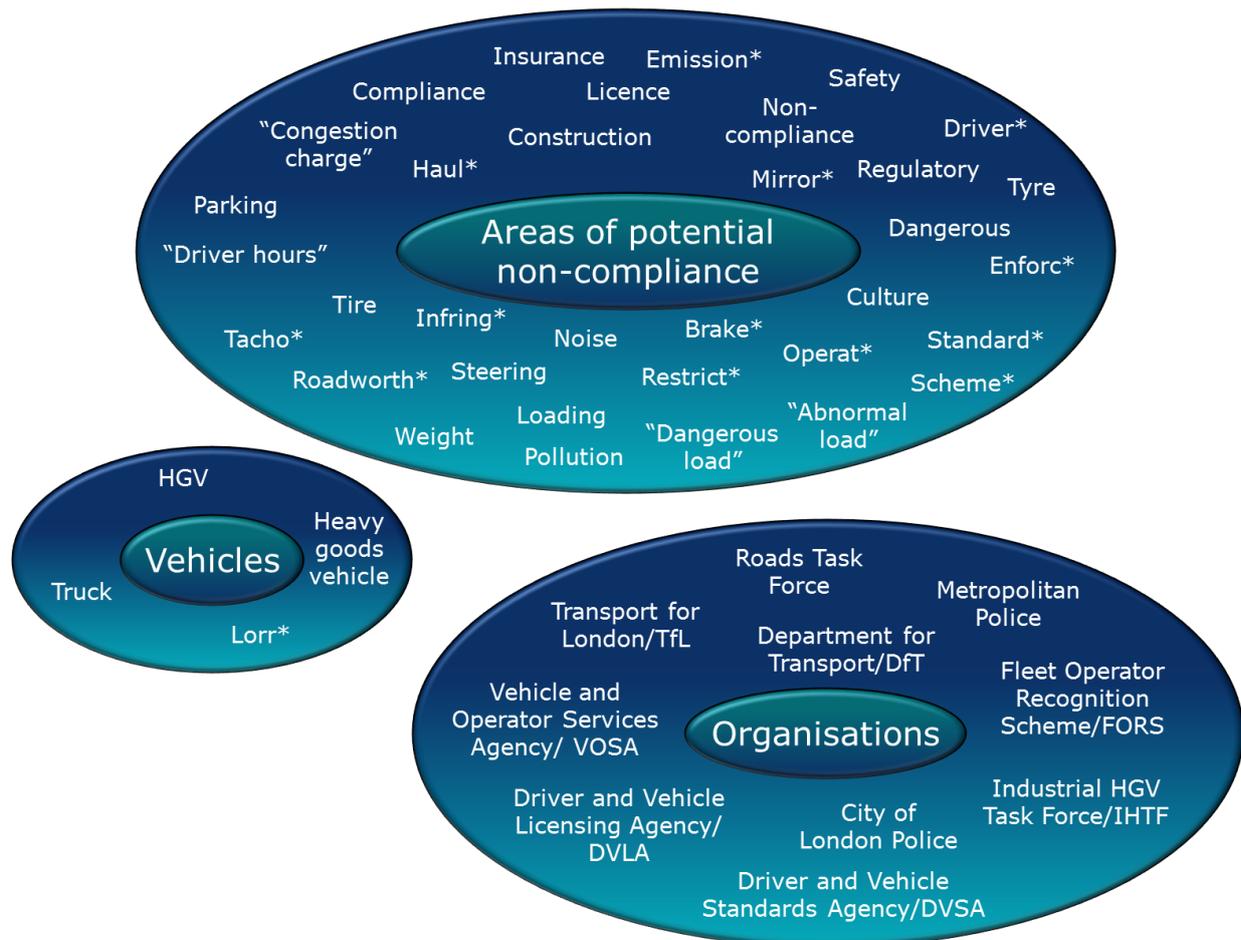


Figure 4. Search terms used in literature review

The search terms were sent to the TRL Library and Information Centre who conducted a search of standard publication databases which included the Transport Research Information database (TRID) and Google Scholar. The search terms were split into three categories; vehicle, potential non-compliance, and organisation. These were then combined to form the following search string.

(HGV or "heavy goods vehicle" OR lorr* OR truck*)

AND

(Emission* OR Compliance OR Non-compliance OR Regulatory OR Culture OR Operat* OR Scheme* OR Restriction* OR Construction OR Haulage OR Driver* OR Dangerous OR Enforc* OR Standard* OR Infring* OR "Abnormal load" OR

“Dangerous load” OR “Congestion charge” OR Pollution OR Noise OR Safety OR Insurance OR Licence OR Tyre OR Tire OR Mirror* OR “Driver hours” OR Tachograph* OR Roadworthiness OR Weight OR Steering OR Brakes OR Parking OR Loading)

AND

(Transport for London, Department for Transport, Roads Task Force, FORS, IHTF, DVSA, DVLA, VOSA, Metropolitan Police, City of London Police)

The terms were written in such a way to capture multiple versions of a key word (e.g. infringing* finds infringes, infringing, infringement etc.). The search by organisation was dropped early on in the search process as it restricted the search to very small numbers. The search sourced literature from the last 15 years.

The initial search returned 132 abstracts. These were assessed on relevance and allocated a score of one to three (one meaning no relevance and three meaning highly relevant). Sources were deemed to be relevant if they provided information on either HGV non-compliance levels, reasons for non-compliance, how compliance data are collected, how non-compliance relates to crash risk/safety, or any comparisons of non-compliance between areas or countries. The papers given a relevance score of two or three were selected for a full-text review; in addition, further papers were included from recommendations by experts within TRL and TTR. During the full text review more relevant articles became apparent through citation in other works; these were also included in the full-text review. A total of 33 papers were included in the final review.

The resulting papers were scored based on the quality of the data, control method, and statistical analysis used, as shown in Table 2. Only papers with scores of medium or high were taken forward for full review, as this gives the best chance that the review is based on those studies from which formal conclusions can be drawn.

Table 1. Data quality scoring

Quality level	Description
High	From a peer-reviewed publication that is clearly methodologically appropriate. This will be a controlled study with an experimental or quasi-experimental design. Other high quality papers include meta-analytical work of various studies on the topic
Medium	From an academic source such as a book chapter or conference paper but without peer-review, and/or possessing some methodological weakness, such as a lack of control group or sampling issues
Low	From a more ‘general’ non-academic source and/or with clear methodological weaknesses for example failing to use appropriate statistical techniques to address random variability

2.2 Data analysis method

The method for this task is provided alongside the findings in Section 4, since the method itself was partly dictated by the findings as they emerged.

2.3 Survey method

A survey was developed to explore perceptions of non-compliance, motivations for non-compliance, and suggestions for improving compliance. Specifically, the survey aimed to:

- Establish which sectors of the HGV industry are over-represented in non-compliant HGV operations.
- Define specific reasons and motivations to regulatory non-compliance of HGV drivers and operators in London.

Surveys were available online (using smartsurvey.com) and in paper format.

2.3.1 Recruitment

A variety of approaches were used to disseminate the online survey, including:

- Emails to:
 - TRL contacts
 - TfL contacts
 - TTR contacts
 - DVSA Operators
 - Mineral Products Association (MPA) London members
 - Freight Transport Association (FTA) members
 - Road Haulage Association (RHA) members
 - National Access and Scaffolding Confederation
 - Confederation of Small Businesses
 - London-based HGV operating companies with email addresses publically available
- Relevant online forums and organisations
- Information presented following online FORS accreditation application
- FORS safe urban driver training
- A TRL stand at the CLOCS event in February 2015
- LinkedIn Transport Manager groups
- Twitter feeds
- Organisations listed in the Applications and Decisions reports
- A driver training provider

In addition, researchers approached drivers, managers, owners and clients with the paper version of the survey at motorway service stations, and approached potential clients of HGV services at two locations (one in north London and one in south London) with a shortened version of the client survey.

2.3.2 Registration survey

In order to target the survey appropriately, a registration survey was initially sent to all contacts, which gathered the following information:

- Role in the HGV industry
 - Driver of HGVs (3.5 tonnes+) (including agency drivers)
 - Transport/fleet manager
 - Owner/director of a company which operates HGVs
 - Line manager responsible for HGV driver(s)

- Client contracting HGV operator(s)/driver(s)
 - Other (please specify)
- Frequency of driving/operating/contracting work requiring operations in London
 - At least once a week
 - At least once a month
 - Less than once a month (excluded)
 - Never (excluded)
 - Don't know
- Type of Operator's Licence
 - Standard (UK or International)
 - Restricted
 - Don't know
- Sector
 - Construction
 - General haulage and distribution
 - Recycling/waste
 - Retail
 - Utilities
 - Agriculture
 - Wholesale
 - Manufacturing
 - Public authorities
 - Other (please specify)
- Email address (only used to send link to main survey, to link main survey responses to registration survey responses, and to contact prize draw winners)

2.3.3 Main survey

Once a respondent completed the registration survey, they were then sent the appropriate main survey link (depending on whether they categorised themselves as a driver, manager, owner or client). Four surveys were developed (see Appendix A):

- Drivers (including agency drivers)
- Managers (transport, fleet, line managers of HGV drivers)
- Owners/operators (owners/directors of companies operating HGVs)
- Clients (i.e. those procuring the services of HGVs).

In order to ensure that only individuals who had completed the registration survey were able to complete the main survey, each respondent was assigned a unique ID (based on their SmartSurvey response number) and asked to input this towards the start of the main survey. The registration and main survey responses were linked for analysis.

An additional version of the main survey was created which incorporated the registration survey questions; this version was emailed by DVSA to HGV operators on their database.

Paper copies of the main survey were also developed for 'face to face' recruitment. These included the registration survey questions, and were used for example when recruiting respondents at motorway service stations.

It became apparent during the project that clients were a difficult group to reach using the online survey. A decision was made to also produce a shortened paper-based version of the client survey, focusing on key questions. This can be seen in Appendix B.

2.3.4 Response groups

The original scope of the research outlined that if a wide-enough uptake of the survey could be achieved through the stakeholder contacts for the project, then a sample size of 750 respondents would be possible. The intention was that these respondents would be split between five groups (originally construction-standard licence, construction-restricted, haulage-standard, recycling/waste-standard, and retail- restricted) and would include around 30-50 respondents of four types (driver, manager, owner and client) per group. This sample (if achieved) would provide sufficient statistical power to gather a good understanding of any medium-sized differences between sectors or respondent types on any of the variables measured.

Unfortunately, due to difficulties recruiting for the survey, a reduced sample size of 448 full and partial surveys was returned. The scope was therefore revised to combine all responses from sectors other than haulage and construction (including 'recycling and waste' and 'retail') into the category 'other' to ensure that the sample size within each cell was sufficient for robust statistical analysis. The sectors used for the final analysis are shown in Figure 5.

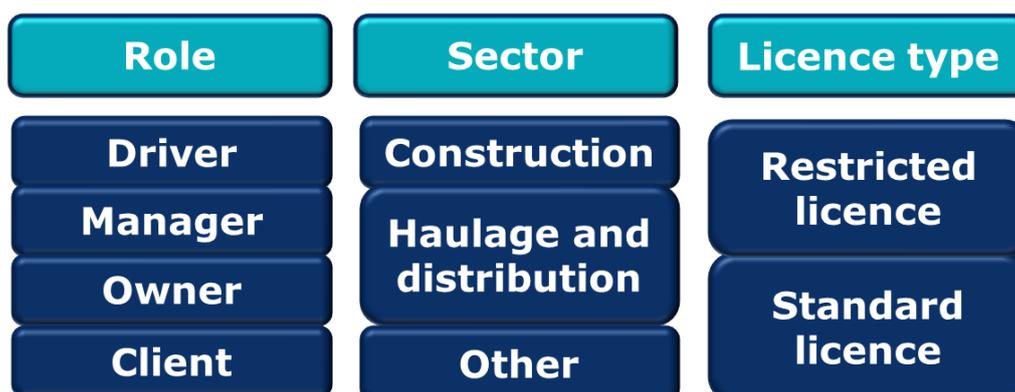


Figure 5. Key respondent groups

By definition, those in the haulage and distribution sector had a standard licence. Clients were not assigned to a licence type or sector. This resulted in 16 possible respondent groups, as shown in Figure 6.



Figure 6. Assigning respondents to groups

The client survey was shortened and extra recruitment effort undertaken to obtain 64 responses for this group. This group cannot be split by licence type and sector and therefore responses were collapsed across these variables.

2.3.5 Survey analysis

Despite great efforts to disseminate the survey as widely as possible, it proved difficult to engage with the target audience, and so the desired sample size was not attained. As a result of the smaller-than-expected sample size, there were limitations on the analysis that could be undertaken:

- There were insufficient driver responses to enable comparison between licence type or sector for this group
- Managers and owners both completed exactly the same survey. Initial tests comparing the responses to a number of key questions suggested that the responses from these groups were comparable. In addition, for smaller businesses, managers and owners are often the same individuals and therefore the decision was made, in order to enhance the sample size and make the statistical testing more powerful, to combine the responses from these groups. For the remainder of the analysis responses are presented for drivers, managers/owners and (where possible) clients. For some questions the responses had to be combined to ensure there were sufficient replies for each option to enable statistical analysis. For example, questions with a five point response scale from strongly disagree to strongly agree had to be combined into a three point

scale: strongly disagree/disagree, neither agree nor disagree, and strongly agree/agree

- Comparisons between groups (e.g. by licence type or sector) were not possible for some questions due to small sample sizes

A key research objective related to establishing 'which sectors of the HGV industry are over-represented in non-compliant HGV operations, with particular attention paid to restricted operator licence holders'. Analysis of survey responses by operator licence type was conducted where the sample size was sufficiently large to enable statistical tests to be carried out, but very few differences between responses from those belonging to organisations with standard and restricted licences were found. Therefore this research question is addressed principally from a qualitative perspective (from the interview findings).

In addition, since information was not available about the prevalence of different sectors and licence types within the London fleet, it was not possible to stratify the survey sample to obtain a proportional sample of each group, and so the sample was selected on the basis of approximately equal numbers in each group. This was a limitation known at the outset of the project, and is one of the reasons why a multi-method approach was used³.

In order to reduce the bias resulting from the self-selection of survey respondents, when distributing the survey, respondents were assured that their responses would remain confidential and no action would be taken as a result of their comments. In addition, many of the survey items asked respondents for their opinions of 'others in the industry' as well as about their own company. This technique was expected to reduce social desirability bias, leading to more honest answers regarding the prevalence of non-compliant behaviours.

2.4 Interview method

2.4.1 Recruitment

Interviewees were selected from a pool of survey respondents who had agreed to take part in telephone interviews. Interviews with people from enforcement and regulatory organisations were recruited via personal contacts provided by TfL (see Section 6.1.2 for the sample of interviewees involved in this task).

2.4.2 Approach

Two structured topic guides (one for drivers, managers, owners and clients and another for those from enforcement and regulatory organisations) were developed to capture all of the required data in an objective and non-biased way (see Appendix C). The topic guides were constructed using open, non-leading questions. Prompts and probes were provided for the interviewers to use if high level questions did not elicit sufficiently

³ All research methods have their limitations. By combining observed inspection data, survey data and interview data, it is possible to approach the same research questions from different methodological standpoints. If data are in broad agreement from different methods, this can be taken as indicating that the findings are not an artificial 'accident' of the particular method used.

detailed responses. Use of a topic guide ensured that all participants were asked the same questions, ensuring consistency of approach. Interviewers used their qualitative interview experience to explore and probe particularly relevant or interesting topics that emerged when an appropriate opportunity presented itself during the interview.

The interviews were recorded using Digital Voice Recorders and transcribed for analysis. Transcribing the interviews provided a rich data source for a full thematic content analysis to detect emerging themes from the interviews. The themes identified are presented throughout this report and are accompanied by verbatim quotes from interview respondents.

It was important to ensure that the topic guides were tested and refined; therefore early interviews were treated as 'live' pilot exercises to ensure that interviewees understood the purpose of the interview and that they could comprehend the questions. Modifications were made to the topic guide where appropriate (e.g. the order in which the questions were asked).

The qualitative data collection was undertaken by a team of experienced qualitative researchers, who were fully briefed to ensure a consistent approach was applied to all of the interviews. Telephone interviews typically lasted around 45 minutes. All respondents were offered a cash incentive or charity donation in recognition of their contribution, and to facilitate recruitment.

In addition to the interview data collection, two workshops were undertaken with all of the interviewers where themes identified from the data collection were discussed to develop a structure for analysis. The first workshop was conducted approximately half way through the data collection period; the second was conducted at the end of data collection. Interviewers also liaised with each other while the fieldwork was being undertaken to share various ideas and emerging themes.

An overview of the qualitative respondent sample can be seen in Table 13.

2.4.3 Interview analysis

Qualitative analysis is an approach which relies on developing themes during data collection to inform the analysis. The qualitative interview transcripts were analysed using Thematic Content Analysis (e.g. Neuendorf, 2002). The steps involved in the analysis included:

- Preparation of the data – this involved reading all of the transcripts to ensure that they were accurate representations of what was said in the interviews
- Initial examination – during the first read through of the transcripts, notes were made regarding high level topic areas that emerged from the data
- Closer examination – the text was reviewed line by line to facilitate micro-analysis of the data
- Identification of initial themes and supporting examples of such themes – topics of interest were sorted into 'themes'; quotes and sections of the interviews relating to similar topic areas were organised into categories. Two workshops with the qualitative interviewers helped to develop and expand the identified themes
- Construction of final themes – the name, definition and supporting data were re-examined for the final construction of each theme using all of the data related to it

- Presentation of qualitative findings – each theme was given a name, and was described and illustrated using verbatim quotes to help communicate respondents' meaning

3 Literature review results

3.1 Background information

The purpose of the literature review was to examine and provide a summary of the literature relevant to HGV regulatory non-compliance, to provide TfL with the best available evidence, and to guide and underpin the remainder of the project.

This literature review focused on academic and grey literature concerning non-compliance.

3.2 Literature review findings

The findings of the literature review are presented below. They are divided into four areas: the association between non-compliance and crash risk, crash risk and accreditation schemes, current non-compliance statistics and theories of non-compliance and violations

3.2.1 *The association between non-compliance and crash risk*

Although HGV-related safety has generally been seen to improve over recent years (Murray, Lantz, & Keppler, 2006; Wong, 2004; Bass & Taramoeroa, 2008; Department for Transport [DfT], 2013a), heavy vehicles still represent a risk on the road. For example they were involved in approximately 14% of fatal crashes while accounting for only 7% of the total domestic distance travelled by motor vehicles in Australia in 2004 (Bass & Taramoeroa, 2008) and were involved in approximately 9.5% of fatal accidents while only accounting for 5% of total traffic in Great Britain from 2009-2013 (DfT, 2013b).

Several studies in North America have investigated how regulatory non-compliance affects the risk of being involved in a crash. Murray et al. (2006) created a driver performance-based model from data collected at roadside inspections, driver conviction data, and past incident involvement to identify which violations significantly increased a driver's likelihood to crash. This study looked at data for 586,894 drivers between 2001 and 2004 and found that 12 compliance violations (relating to both the driving and vehicle maintenance) and 12 convictions significantly increased crash likelihood by between 21% and 325%. A reckless driving violation, improper turning violation or improper or erratic lane change conviction all increased crash risk by 100% or more. Speeding, hours-of-service, size and weight, and disqualified driver violations also all had significant associations with crash risk. This is not surprising as speed and fatigue are associated with an increased crash risk while driving other vehicle types (see Grayson & Helman, 2011, for a summary of this literature). Large vehicles loaded above weight limits are likely to be less manoeuvrable and more difficult to control, especially in an emergency (Jones, 2013).

A similar study in 2014 modelled crash risk by simulating Carrier Safety Measurement Systems scores, a workload prioritisation tool used by the FMCSA (Federal Motor Carrier Safety Administration), using data from a database of previous roadside inspections and incident reports (Volpe, 2014). Subsequent crash involvement was used to analyse how violations of different regulation categories predict crash rates. Violations involving unsafe driving, hours-of-service compliance, and vehicle maintenance compliance were

the strongest predictors of crash rate (they were associated with the largest percentage increase in crash rate) when compared with the national average. However, violations associated with driver fitness were not found to have a negative correlation with higher crash risk; as driver fitness 'violations' (e.g. lack of training and experience) increased, crash risk decreased, suggesting that regulations around driver fitness and licensing may not improve road safety. This research also found that the more behaviour and safety categories identified for investigation per vehicle, the higher its associated crash rate. The control method used in the study was to compare crash risk associated with non-compliance in the areas investigated with the national average crash rate; hence the estimated crash risks associated with Carrier Safety Measurement Systems scores may have been underestimated. However, greater knowledge of the specific effects of non-compliance on crash risk could have been found if data were compared against vehicles without the violation of interest, or used vehicles with no violations as a base line (instead of the national average).

These results replicate those found by Lueck and Paul (2012) who also found that 'alerts' (scores indicative of a serious violation) in unsafe driving, vehicle maintenance, fatigued driving, substance/alcohol and driving fitness were more valid indicators of safety than just using Carrier Safety Measurement Systems scores. Drivers with alerts in all five areas had a crash rate of approximately 5.1 times that of drivers with sufficient data and complete compliance.

Research has also been conducted into the number of violations in HGVs involved in fatal crashes. It was reported that over a third of HGVs involved in fatal accidents in the USA would have been placed out of service due to non-compliance had they been inspected before the crash (a much higher proportion than those put out of service in randomised roadside inspections (Fuetsch, 2010)). Brake problems, driver violations and light/marker violations were present in 18% to 31.5% of fatal crashes. In total 65.9% of vehicles were committing at least one type of violation at the time of the crash (compared to around 20% from randomised inspections (Fuetsch, 2010)), although around 30% of these would not have caused the vehicle to be put out of service (Blower & Campbell, 2002).

Research has also examined driver licence compliance in drivers involved in crashes. It was found through analysing crash data that HGV drivers were amongst the least likely to have an invalid licence when compared with all other motor vehicle types, with non-compliance levels of just 3% (National Highway Traffic Safety Administration, 2014). This is possibly due to the close regulation of HGVs compared to other vehicle types such as cars.

Although driver licence compliance was not analysed as an individual violation in the research by Murray et al. (2006) and Volpe (2014), it was included as an integral part of driver fitness. In the Volpe (2014) study it was found that driver fitness was associated with a 9% decrease in crash risk when compared with the national average.

It has been argued that most fatal crashes involving HGVs are not the fault of the truck driver (Bass & Taramoeroa, 2008) but that responsibility may instead lie with the operating company. Findings from Moses and Savage (1994) support such arguments. They found that operators unfamiliar with hours-of-service regulations and the need to keep records of their drivers' on duty hours had a crash rate 30% higher than those who were familiar with these regulations.

- Regulatory non-compliance influences collision risk with non-compliance of almost all regulations significantly increasing the future crash risk of a vehicle
- A large proportion of HGVs involved in crashes have been found to be non-compliant (a higher proportion than found in randomised roadside surveys)

3.2.2 Crash risk and accreditation schemes

Other areas of research looking into the relationship between HGV regulatory non-compliance and crash risk have looked at how accreditation schemes impact crash risk and road safety. Accreditation schemes have been designed to reward companies who demonstrate high levels of compliance with certain regulations as well as having good managerial practices. Rewards typically include flexibility around safety tests and investigations and some regulatory concessions such as higher weight limits. These schemes aim to stimulate a culture of responsible and voluntary compliance (Bass & Taramoeroa, 2008).

Bass and Taramoeroa (2008) ran several different analyses to evaluate the safety benefit of accreditation schemes. Firstly they found that companies with accreditation (by TruckSafe or NHVAS, the two main accreditation bodies in Australia) had significantly fewer crashes than companies who were not accredited; accredited companies had on average between 50% and 75% fewer crashes than those who were not accredited. Secondly they looked at the difference in insurance claims between accredited and non-accredited companies; non-accredited companies were 1.5 times more likely to make a claim. Finally they examined the benefits of accreditation by comparing crash risk before and after a company gained accreditation. This analysis found that claims rates in the two year period after gaining accreditation by TruckSafe were 57% lower than in the two years before.

Although this last element of the research was only conducted on a small sample, it suggests that the process of gaining accreditation helps improve compliance and safety. It is a step towards disputing the argument against the effects of accreditation (the argument being that the differences in crash rates between accredited and non-accredited companies are due to safer more compliant companies seeking accreditation and not just due to the process or outcome of gaining accreditation). However, it should be noted that these results may simply be due to regression to the mean. This is where, if a variable's score is extreme at its first measurement, it will tend to shift towards the average on the second measurement. Hence, if companies with low compliance sought accreditation, their improvement may have been due to regression to the mean rather than taking part in the accreditation process.

Bass and Taramoeroa (2008) also conducted a literature review and compared the effectiveness of accreditation schemes from other countries. They found similar results to those reported in Australia for schemes in Canada and America, and also found that such schemes are becoming increasingly popular.

3.2.2.1 Enforcement effectiveness

Part of the enforcement process in North America is to identify high risk operators with low compliance levels as indicated by data from inspections, and conduct a compliance review. The review involves an onsite examination of driver disqualifications and licences, hours-of-service records, vehicle maintenance, accident records, financial

responsibilities, hazardous materials, and a controlled drugs test. Operators are issued with a rating of either satisfactory, conditional satisfactory or unsatisfactory. Those given one of the latter two ratings are required to take corrective action during the following 30 days or the operation is put out of service within the USA (Chen, 2008; FMCSA, 2014a).

In 2008 it was found that reviewed companies had a 15-39% reduction in crash rates, regardless of their size, organisation type, or safety rating. This suggests that an improvement in compliance levels increases road safety. The year the compliance review took place, and the general reduction in crash rates by non-reviewed companies were controlled for in the analysis, to give a true estimation of the reduction associated with the compliance review (Chen, 2008). Similar research took place in 2009 which found a sizable difference in terms of lives saved and accidents avoided before and after a compliance review (FMCSA, 2014a).

These results, together with those reported in Section 3.2.1, demonstrate that regulatory non-compliance is strongly related to an increased crash risk and that crash risk can be decreased by increasing compliance either voluntarily or through law enforcement.

- Non-compliant managerial practices may impact on road safety and crash risk
- Voluntary accreditation schemes which reward highly compliant companies appear to reduce crash risk
- Enforced compliance reviews also impact road safety by reducing non-compliance levels in reviewed companies

3.2.3 Current non-compliance statistics

There are two main types of data in the literature on compliance levels. These are data from enforcement bodies, and survey data.

3.2.3.1 Police enforcement data

In North America in 2004 1,070,965 inspections were conducted of which 73% had one or more regulatory violation; 36% of these violations were from driver inspections, 67% from vehicle inspections, 19% from hazardous material inspections, and 7% had out of service violations (McCartt, Campbell, Keppler, & Lantz, 2007) (the percentages do not add to 100 as some vehicles had violations in more than one category).

Current enforcement data from the UK in 2013/14 show that out of the 404,036 compliance checks conducted, 35,959 had faults that were corrected at the time of the test (8.9% out of the initial failure rate of 21.6%) and 51,191 of the vehicles failed (12.7%, the final failure rate). These data also provided the reason for failure with the top ten for HGVs all relating to vehicle maintenance (the most common being problems with headlamp aim). It was also recorded that for vehicles originating in GB, 31.3% of mechanical checks resulted in prohibition, 13.0% of drivers checked for hours of service violations were issued prohibitions, and 58.2% of those checked for weight were issued prohibitions. Each of these results was between 1% and 3% higher for HGVs not of GB origin (VOSA, 2014).

Data from sources such as the police provide valuable information on the effectiveness of current enforcement methods, the consequences of their investigation, and the types

of violations occurring. Due to the lack of random targeting methods however, police data cannot provide an accurate picture of current levels of non-compliance. The studies reported in the section do however show that targeting techniques appear to be effective as high rates of non-compliance are typically found. They also demonstrate that enforcement methods across GB and the USA are relatively consistent at targeting high risk vehicles.

Some non-targeted testing does occur. For example in North America, the FMCSA requires carriers to test 10% of their commercial drivers (annually) for alcohol and 50% for drugs. Drug testing is mostly done through random testing although some targeted testing is performed (targeted test results are analysed separately). One study examined survey forms that were sent to 2,976 randomly selected carriers with a high majority being returned with usable data. The study found that 0.9% tested positive for any illegal drug and 0.1% tested positive for alcohol over the legal threshold (FMCSA, 2014b).

3.2.3.2 Survey data – roadside surveys

Survey data collected from roadside inspections has been the main way of estimating current levels of HGV regulatory non-compliance. Some literature has focused on specific regulations such as speed, while other literature examines overall compliance.

One survey that focused on HGV speed compliance found an increasing trend in the percentage of HGVs travelling over the permitted speed in Australia. The percentage of speeding HGVs was 18% for rigid vehicles (with 14% traveling at speeds greater than 10% above the speed limit, just over 1% traveling at 10 to 15% over the limit, and just under 1% traveling at a speed of greater than 15% above the limit) and 26% for articulated vehicles (where 24% were traveling at speeds more than 10% over the speed limit with similar results to rigid vehicles for higher speeds). It was also found that the percentage of speeding vehicles was steady over time of day for articulated lorries but for rigid vehicles, the majority of speeding occurred between 6am and 6pm (VicRoads, 2002). The data for this survey were gathered from 84 weigh-in-motion sensors placed across roads with 100km/h and 110km/h speed limits (data were collected from 1995-2000); there is a lack of data for HGV speed compliance on slower and urban roads.

Similar results to these have been reported by Friswell, Irvine and Williamson (2003) using temporary speed recorders positioned near to 20 fixed speed cameras. This research also took place in Australia and found that the percentage of speeding heavy vehicles (buses and HGVs could not be distinguished by this technology) varied between 25-45%. Around 8-19% more light vehicles travelled over the speed limit than heavy vehicles in urban areas but there were similar non-compliance rates for rural areas with 34% and 32.6% of light and heavy vehicles respectively traveling over the limit. For all vehicles, the level of non-compliance was higher on rural roads. In general these results suggest that heavy vehicles have lower rates of speed non-compliance except on 110km/h roads.

Operating companies have started to introduce speed regulators into their heavy commercial vehicles with the aim of reducing speed non-compliance. However, a review of Australian research estimated that 10% to 30% of speed limiters have had their settings tampered with to increase the speed the vehicle is limited to (Wong, 2004).

Recent surveys looking at compliance levels more generally have found similarly high levels of non-compliance to those found in the speed reports. Data collected from

Roadcheck 2010 (a 72 hour event that randomly selects HGVs for compliance checks in North America) found an initial pass rate of 80%, with 4.4% having non-compliance levels high enough for the vehicle to be put out of service (Fuetsch, 2010).

Similar levels of compliance were found in the Fleet Compliance Checks of vehicles in GB. This survey randomly selected 5,281 GB and non-GB vehicles between April 2012 and March 2013. Overall 12.6% of all HGVs checked resulted in a prohibition, 75% had no roadworthiness defects, and around 85% were not committing traffic offences. Significantly lower prohibition rates were found for HGVs from GB companies than for non-GB companies (DfT, 2013a).

The results were broken down further by roadworthiness defects and traffic offences. For roadworthiness defects, 9.9% of GB vehicles were issued with prohibitions with 74% having no defects. For non-GB vehicles 15.3% received prohibitions and 76% had no defects. The main cause of prohibition in both GB and non-GB vehicles was brake defects. Around 50% of GB HGVs had trailers, of which 78.5% had no defects; nearly all non-GB HGVs had a trailer with 72% having no defects. Vehicle age was the most important factor in non-compliance and vehicle roadworthiness with older vehicles being less likely to be compliant. In regards to traffic offences, 13.5% of GB and 15.3% of non-GB vehicles were issued with prohibitions; however a lower percentage of non-GB than GB vehicles were found to be committing a traffic offence. The vast majority of traffic offences were non-compliant tachographs and driver hours of service (DfT, 2013a).

A survey of vehicles in Northern Ireland in 2013 using a similar methodology to that reported in DfT (2013a) found a compliance level of 77%. This was compared with results from the same survey run in 2009 and showed a 25% increase in percent points in compliance levels (increasing from 52% to 77%) (Northern Ireland Statistics and Research Agency, 2013). In the following year (2013/2014) just over one third were given a verbal warning and 20% (14.7% due to roadworthiness defects and for 9.8% traffic offences) were prosecuted or issued a fixed penalty notice or prohibition. A small percentage of prosecuted vehicles had multiple offences. Again, brakes and hours of service along with lights were the main causes of prohibition or prosecution and when compared with results from previous years showed a decreasing trend in non-compliance (Northern Ireland Statistics and Research Agency, 2014).

3.2.3.3 Survey data – questionnaires and interviews

An alternative method used to estimate HGV non-compliance levels has been through the use of questionnaires and interviews with drivers and other staff members which influence HGV compliance. It should be noted that this methodology provides self-report data on compliance which is sensitive to social desirability biases and rely on opinions not observable data. However, it can provide insight into the perception of compliance within the industry. This style of research has also been used to look at attitudes towards compliance and possible reasons for non-compliant behaviour.

In New Zealand a study was conducted to gauge the levels of non-compliance around hours of service regulations (Baas, Charlton, & Bastin, 2000). It included a survey of 600 drivers at truck depots and various other locations, plus a simulated driving test of 100 drivers to get a performance-based measure of sleepiness. Results showed that a substantial number of drivers violated hours of work regulations with 33% admitting to driving for over 11 hours in a 24 hour period, and only 69% reporting being able to get

at least nine consecutive hours of rest between driving shifts in the last 48 hours as required by the hours of service regulations for New Zealand in 2000. As well as this, high levels of sleepiness were found in the drivers with 9% of drivers failing the simulator test. Results for this test were based on behaviours such as divided attention response time, steering activity variability, and speed variability.

The country from which most of the research in this field has originated is Australia. A 2006 survey of driver speed behaviour involved face to face surveys with 619 long haul HGV drivers (AMR Interactive, 2006). It was found that 25% reported feeling under pressure to travel over the designated speed to meet deadlines; this was also reported by the drivers to be the most common reason for speeding. The survey also enquired about past driving offences and found that 20% of drivers reported being caught for speeding in the last 12 months. Other key findings included that one third of drivers agreed that it is okay to drive within 10km/h over the speed limit with enough driving experience, and that 20% reported speeding during at least half of their trips even though the vehicle was supposed to be speed limited. As well as deadline pressures, other motivations reported for speeding included keeping up with the general traffic flow, feeling that the designated speed was inappropriate, there being limited traffic on the road, and feeling that the risk of being caught was low. Another possible influencing factor may be the lack of company promotion of speed compliance with only 50% of company drivers reporting that their company at least sometimes promoted the importance of not traveling over the limit.

A later survey included job roles in the supply chain that also exert influence on the level of compliance with road safety regulations. For example the sample included loaders and farmers as well as drivers (AMR Interactive, 2007). Over 300 companies took part in the survey which included questions on offences in the following five areas: vehicle load, load restraint, vehicle maintenance, driving speed, and seatbelt use. Results once the data were combined for each company showed that 40% considered non-compliance in each of the five areas had occurred within or on behalf of the company. This perception of offence frequency was much higher for larger companies (more than ten vehicles) than smaller ones. Around one third of companies considered vehicles to be overloaded and to have loads that were not properly restrained at least occasionally, and in the past 12 months 27% of companies reported infringements in vehicle maintenance and load, and 22% had speeding infringements. Another non-compliance area was the non-wearing of seatbelts, which was reported by 13% of companies.

The results also showed a gap between the perception of levels of non-compliance within the industry and within the company, with people believing higher levels of non-compliance occurred in the industry than in their company. It was also found that drivers and the company operating the truck were viewed as being the most responsible for the safety and compliance of vehicles. Companies operating HGVs were more likely than those who were not operating HGVs to agree that a driver could safely travel up to 10km/h above the speed limit and were less likely to agree that overloaded trucks caused substantial damage to the road systems. However, HGV-operating companies were also more likely to agree it was their responsibility to promote road safety which may suggest that there is a lack of understanding within the industry as to the effects of non-compliance. The research demonstrates that non-compliance occurs throughout the industry at many levels and is performed consciously. Although these results are not directly comparable to results from roadside checks, broadly similar levels of non-compliance were found.

A survey by Lueck and Brewster (2012) of nearly 6,000 drivers in North America demonstrates how changing policy and enforcement methods can reduce self-reported non-compliance. Of the drivers surveyed, 28% felt that hours of service violations had decreased and 30% reported that they have refused to drive unsafe loads or operate poorly maintained equipment. According to the participants one of the fundamental reasons for this reduction was newly heightened concerns about non-compliance due to the introduction of the new CSA (Compliance, Safety, Accountability) safety measurement initiative.

- Enforcement data show that a large amount of non-compliance of different regulations is occurring. Although these data are largely collected via targeted enforcement approaches, they provide insight into what specific offences occur and by whom. Results from this area suggest that brake and lighting defects are the most common cause of vehicle compliance check failure
- The most current results from (generally non-UK based) randomised roadside surveys have consistently found between 20 and 25% of vehicles as having some form of defect
- Perceptions of non-compliance levels by industry members are similar to those observed through road checks

3.2.4 Theories of non-compliance and violations

There are various theories pertinent to understanding why violations of rules and procedures occur. Some of the most relevant theories to this particular piece of research are summarised here. These theories have been considered when formulating the recommendations.

3.2.4.1 Types of violation

A recent study by Jones (2013) in Australia investigated possible motivations behind non-compliant behaviour by surveying a range of people involved in the HGV industry. Structured interviews were conducted with drivers, enforcement officers and key industry bodies.

Through the interviews six motivations were identified; failure of regulatory reach, lack of ability to comply, lack of willingness to comply, economic imperative, opportunism and determined recidivism. Failure of regulatory reach refers to individuals or companies being unaware of the laws and regulations around this industry. This was mostly seen in companies where driving HGVs is seen as ancillary and not as a core part of their business (for instance, farmers and construction companies). Responses concerning the lack of ability to comply mostly related to fatigue laws and ambiguity within these laws as to what compliance looks like, whereas those about the lack of willingness to comply suggest that more willing non-compliance occurs due to inconsistent or ineffective enforcement, high time costs of compliance, and the lack of a perceived credible link between the regulation and transport safety. Opportunism was seen as slightly different to lacking willingness to comply. The latter is categorised as a response to a perceived unfairness or unreasonableness of a law whereas an opportunist solely bases non-compliance decisions on the probability of not getting caught at the time. The high price of compliance (economic imperative) was cited by almost all interviewees as a key reason for non-compliance; drivers felt that if they refused to take on overloaded or unsafe loads then the contractor would simply find someone else prepared to take the

risk. Lastly, enforcers tended to classify operators as determined recidivists (people that appear to be impervious to sanctions) more than other people working in the HGV industry. It has been suggested that these are typically older more experienced males which is supported by findings in the AMR Interactive report (2006), where most people agreed it was acceptable for an experienced driver to speed.

Hudson (2000) defined five types of violation (or 'non-compliant act') which translate well to workplace-based situations:

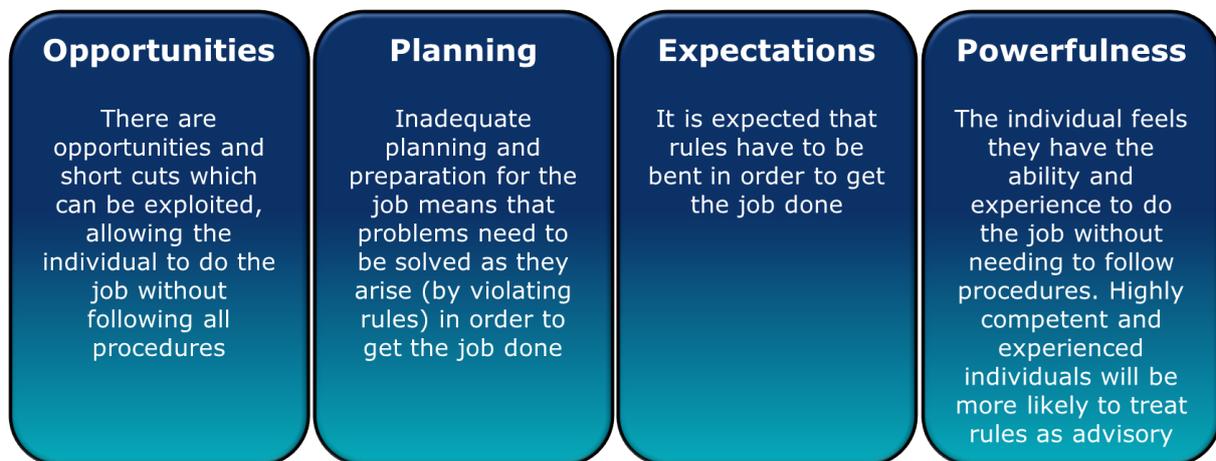
1. Unintentional violation – such violations may also be thought of as errors. They can result from a lack of knowledge or understanding of the rules, or from different individuals holding a different understanding of the rules. In particular, new employees may be prone to unintentional violations. Tasks requiring knowledge of a large number of rules may also be susceptible to unintentional violations. An example of an unintentional violation in relation to HGVs may be a driver not being aware of parking restrictions and parking illegally.
2. Routine violation – as the name suggests, these are violations that occur regularly, because the individual or group committing the violation does not believe the rule in question applies to them. Such violation behaviour often becomes automatic and unconscious, so that the individual does not realise that they are committing a violation unless it is brought to their attention. These deviations from rules and regulations are often perceived as involving little risk, and are seen as a normal, routine way of doing the job, thus becoming a group norm amongst the organisation or industry. Routine violations may occur where rules are perceived as being overly restrictive or no longer applicable; in particular, skilled individuals may perceive that a violation of the rule will not pose a risk to their safety (HSE, 1995). An example of a routine violation in relation to HGVs may be not conducting a full daily vehicle check.
3. Optimising violation – this type of violation may occur to benefit the individual (in an attempt to make the job more interesting or exciting, in particular where jobs are repetitive or not challenging enough) or the organisation (in an attempt to achieve what the individual believes the organisation really wants out of them). Optimising violations may also occur where individuals try to test the safety boundaries of a system. An example of an optimising violation in relation to HGVs may be exceeding the speed limit when driving (personal benefit) or overloading the vehicle in order to make more deliveries on a single shift (organisational benefit).
4. Situational violation – situational violations are affected by the immediate environment (situation) which 'encourage' employees to commit a violation, or make it impossible *not* to commit a violation, in order to achieve the end requirement. Examples of environmental factors which may lead to situational violations are the design of the workspace, time pressures, staff resources, equipment resources, supervision/management, and less controllable factors such as weather and time of day. An example of a situational violation in relation to HGVs may be a driver exceeding their working hours in order to complete a job.
5. Exceptional violation – these violations occur only in particular, unexpected circumstances, such as an equipment failure or an emergency. Exceptional violations may result from a conscious decision, or instinctive reactions, which aim to alleviate the situation. They are often associated with high levels of risk

because the consequences of the action are not known, or are known but no alternative action is available.

3.2.4.2 *Managing non-compliance*

Hudson, Vuijik, Bryden, Biela & Cowley (2008) describe how violations (i.e. non-compliances) can combine with errors to result in a negative outcome (in the context of HGVs, this could be an overloaded lorry – the violation - braking sharply to avoid an unforeseen road hazard – the error – resulting in a negative outcome of an accident and potential prohibition). In order to avoid negative outcomes, errors need to be reduced, and/or violations need to be managed. This is difficult because violations are often performed without anybody else’s knowledge, and errors are unpredictable.

It has been proposed that there are four factors which predict whether individuals will violate rules (Hudson & Verschuur, 1996):



Violations can be managed using this framework, by addressing these four factors within HGV operations.

- Violations against rules and procedures may be motivated by failure of regulatory reach, lack of ability to comply, lack of willingness to comply, economic imperative, opportunism and determined recidivism
- Non-compliance may be also be thought of as unintentional, routine, optimising, or situational

4 Analysis of targeted stop data

The Metropolitan Police Service's Commercial Vehicles Unit (CVU) undertakes a number of functions, including targeted roadside enforcement of commercial vehicles (i.e. HGVs, LGVs and PSVs) in London. Vehicles are targeted for a range of reasons:

- Vehicles which may be non-compliant and/or dangerous are visually identified. The reasons for identifying these vehicles include:
 - Obvious mechanical defect
 - Poor or inappropriate driving
 - Possible insecure load
 - Possibly overweight
 - Dirty and/or unprofessional looking vehicles
- Vehicles working for operators with a previous history of non-compliance
- Intelligence from external sources including TfL, DVSA and other police forces
- Specific operations which aim to target particular sectors i.e. light goods or novelty vehicles.

TfL provides funding to the CVU to enhance this work with the aim of investigating all personal injury collisions between cyclists and vehicles over 3.5 tonnes.

The Industrial HGV Task Force (IHTF) was formed in October 2013 through a partnership between TfL and DfT. The team (comprising Metropolitan Police Service officers, City of London Police officers and DVSA) undertakes targeted roadside enforcement, similar to the CVU, but with a focus on vehicles operating in the construction and waste sectors. In particular, the IHTF targets vehicles whose operators claim exemption from key road safety legislation, including operator licensing and plating/testing regulations (TfL, n.d.).

The IHTF also utilises the Operator Compliance Risk Score (OCRS) system to target vehicles via automatic number plate recognition (ANPR). OCRS is a DVSA-owned and operated system which utilises historic data to calculate a Red, Amber or Green ranking. An operator identified as Red on the system is considered to be at a higher risk of non-compliance than one identified as Amber or Green. Each operator gets two rankings, one for 'roadworthiness' (which relates to mechanical compliance) and one for 'traffic' (which relates to drivers' hours and other process-related issues).

The CVU and IHTF conduct their enforcement activities along key casualty corridors and routes leading to major construction sites. The locations are chosen to allow enough room to stop several large vehicles at a time and so that officers can work safely around the vehicles.

Due to the targeted nature of the stops the CVU and IHTF record higher non-compliance of HGVs than would be expected in the general vehicle population. For example, during a six-month trial starting in October 2013, the IHTF stopped over 900 vehicles from the construction and waste industries and almost three quarters were found to be non-compliant. As a result, TRL has provided TfL with a methodology for conducting a non-biased survey of HGV compliance in London. This will provide an estimate of the level of non-compliance in the wider fleet of HGVs in London. These results will be published in a further report later in 2015.

The purpose of this task in the current report is to review the targeted IHTF and CVU data to identify at-risk sectors and profile common non-compliant operator types. The analysis identifies the most common offences and evaluates if differences in the types of offence exist between vehicle and operator types. Where data were available, the trend over time was also examined. The results from this analysis are presented in Section 4.1.

In addition, collision data from the national database of road collisions involving personal injury reported to or by the police were examined. The Stats19 database holds details of the circumstances of each collision, along with information on factors which, in the reporting officer's opinion, may have contributed to the collision. These factors include vehicle defects such as defective or under-inflated tyres and defective brakes. These data provide an indication as to whether vehicle defects were likely to have contributed to injury collisions involving HGVs in London. The results from this analysis are presented in Section 4.3.

Summaries are presented in boxes at the end of each section.

4.1 Analysis of targeted IHTF and CVU roadside inspections

Data from CVU roadside inspections between January 2011 and October 2014 inclusive and from IHTF inspections between October 2013 and October 2014 inclusive were supplied by TfL for this analysis.

The information recorded as part of these inspections has changed a number of times over the reporting period, with more details being added to the form over time. Table 2 shows the number of inspections included within each dataset.

Table 2. Records held in each dataset provided

CVU dataset	Inspections	IHTF dataset	Inspections
CVU 2011	3,754	IHTF Oct 13 - June 14	2,853
CVU 2012	3,926	IHTF July - Oct 14	815
CVU 2013	6,414	Total	3,668
CVU Jan - Jun 14	2,347		
CVU July - Oct 14	1,996		
Total	18,437		

Figure 7 shows the number of inspections carried out monthly by the two teams between 2010 and 2014.

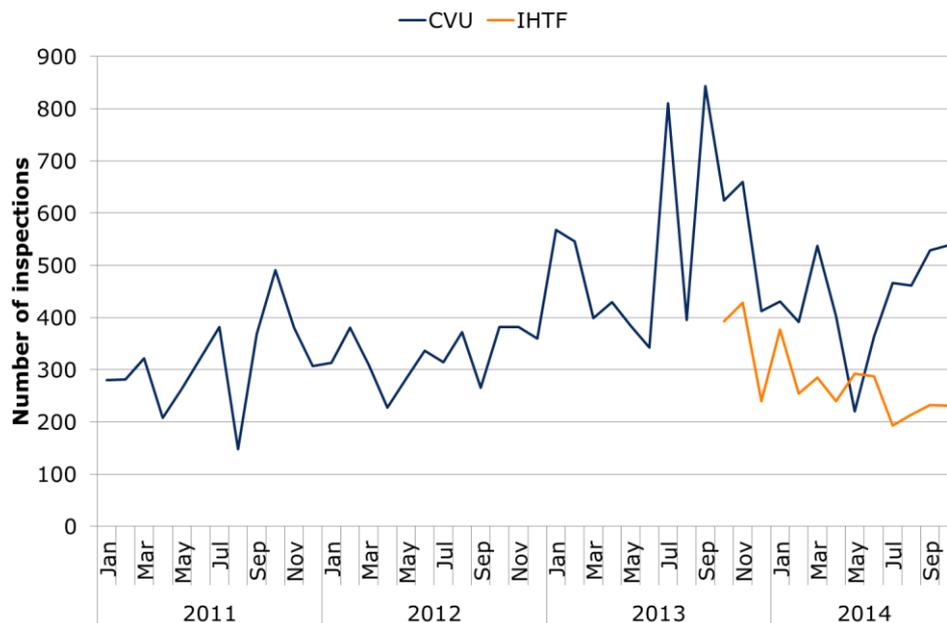


Figure 7. Number of roadside inspections carried out by the CVU and IHTF by month and year

In the following analysis the results for the two teams will be combined.

Due to the number of changes to the CVU and IHTF inspection forms, a number of fields are unavailable for the earlier inspection periods or are recorded in a different way, meaning the results are not comparable between time periods.

The most substantial change to CVU and IHTF inspection forms occurred in July 2014 when a large number of additional fields were added. At this time, the field 'vehicle industry sector', which details the industry in which the operator works, was added in its current format⁴. The possible options for this field include construction, recycling, waste, haulage and transport logistics.

One of the aims of this analysis is to identify particular at-risk sectors and therefore, due to the availability of data specifically within this period, the analysis in this section has been restricted to data from July 2014 to October 2014. In total 2,811 vehicles were inspected during this time (1,996 by the CVU and 815 by the IHTF).

HGVs often consist of both a cab unit and a trailer. Within the data, HGV cabs and trailer units are recorded as separate inspections, which could potentially be linked by the vehicle registration mark (VRM). However, due to the free-text nature of the data this linking has not been carried out for this analysis and therefore the results should be interpreted with care as some inspections are not independent; if the HGV cab is inspected and vehicle defects are found, then it may be more likely that the trailer will also have defects associated with it.

⁴ Prior to this, this field was available within some of the datasets however the level of detail available from July 2014 onwards was substantially greater.

4.1.1 Summary of vehicles inspected

The number of vehicles inspected by vehicle weight and vehicle type is shown in Table 3.

Table 3. Vehicles inspected by weight and vehicle type

Vehicle Weight (kg)	Rigid	Artic	Trailer	Coach	Volumetric	LGV <3.5T	Other & Unknown	Total
<=3500	24	0	4	0	0	31	31	90
3,501-7,500	337	0	3	7	0	5	0	352
7,501-18,000	502	26	11	72	0	0	3	614
18,001-26,000	217	62	20	24	0	0	1	324
26,001-32,000	723	8	12	1	2	0	0	746
32,001-36,000	2	3	15	0	0	0	1	21
36,001-44,000	7	324	200	0	4	0	3	538
44,000+	3	4	4	0	0	0	1	12
Blank or N/A	0	0	49	1	0	2	62	114
Total	1,815	427	318	105	6	38	102	2,811

Rigid HGVs were the most common vehicle type inspected (65% of vehicles) followed by articulated HGVs (15%). Rigid vehicles typically weigh between 3.5 and 32 tonnes whilst the articulated vehicles tend to be heavier, with many in the range of 36-44 tonnes.

Vehicle industry sectors can be grouped into five categories: recycling and waste, transport and logistics, construction, haulage and 'other and unknown'. The 'other and unknown' category includes industries such as passenger, utilities and dangerous goods; however, the majority (84%) of inspections in this category were recorded as unknown industry. The distribution of the 2,811 inspections across these sectors is shown in Figure 8.

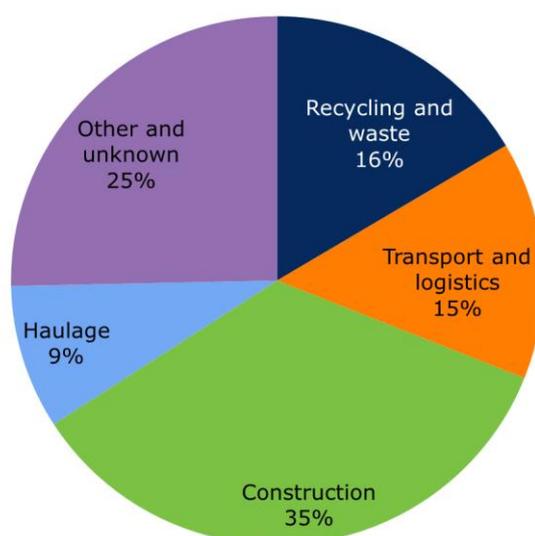


Figure 8. Distribution of inspections by vehicle industry sector

The construction industry accounted for the largest proportion of vehicles inspected with 35%. The IHTF is known to target the construction and waste industries which is likely to be the reason for the prevalence of these vehicles in inspections.

Figure 9 shows the distribution of vehicle types between the different industry sectors.

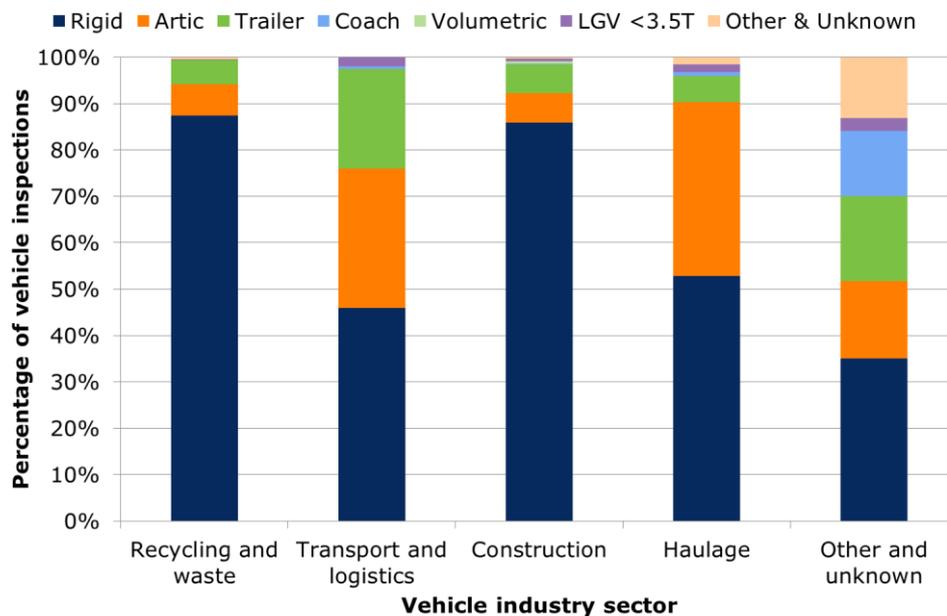


Figure 9. Vehicle types inspected from each industry sector

Rigid vehicles accounted for the majority of vehicles inspected from all industries. The 'recycling and waste' and 'construction' industries had the largest proportions of rigid vehicles inspected, 87% and 86% respectively. The 'transport and logistics' and 'haulage' industries had much lower proportions of rigid vehicles (46% and 53% respectively) but higher proportions of articulated vehicles than the other industries.

All of the vehicles from the recycling and waste industry were from Great Britain, compared with 72% from transport and logistics, 98% from construction, 83% from haulage and 80% from other and unknown industries (7% of the vehicles from other and unknown industries had no country specified). Vehicles from Romania, Poland, Lithuania and the Netherlands were the most common non-GB registered vehicles, accounting for over 20 inspected vehicles each.

The VRM was used to estimate the age of the vehicles inspected⁵; the distribution of these is shown in Table 4.

Table 4. Vehicles inspected by age

Vehicle age (years)	Number of vehicles inspected	% of vehicles inspected
0-2	340	12%
3-4	391	14%
5-6	259	9%
7-8	623	22%
9-10	231	8%
11+	449	16%
Unknown age	518	18%
Total	2,811	100%

The majority of vehicles inspected (22%) were aged at 7-8 years.

Of the vehicles stopped for inspection, 21% had FORS membership. FORS is a voluntary scheme that assists operators in improving their performance in all areas of safety to aid them in complying with legislation.

4.1.1.1 *Cycle safety equipment*

Cycle safety equipment was fitted to 76% of vehicles from the recycling and waste industry, 72% of vehicles from transport and logistics, 88% from construction, 14% from haulage and 11% from other and unknown industries. Previously the IHTF data recorded whether the vehicle was exempt from requiring cycle safety equipment being fitted. Without this information, it is unclear whether the vehicles without cycle safety equipment fitted are committing an offence or are exempt. It is recommended that the option of a vehicle being exempt from this requirement is added to the data collection forms. In addition, it may also be beneficial to record what cycle safety equipment was or was not fitted (side guards, blind spot mirrors etc.).

Analysis of London's Low Emission Zone monitoring camera data (Robinson & Cuerden, 2014) estimated that:

- 10% of lorries (goods vehicles of at least 3.5 tonnes) operating in London are exempt from fitting side guards.
- 30% are not fitted with class VI mirrors and 5% are not fitted with class V mirrors.

⁵ It was only possible to classify the age of vehicles where the VRM was 6 or 7 digits long and in the standard UK format. VRMs which were shorter or longer than this, or not in the standard format, were assumed to represent personalised plates or VRMs from outside the UK, and hence the age could not be identified. VRMs that were 6 digits long and fit the UK standard were assumed to be non-personalised and the age was allocated based on the first letter. This group may include some personalised plates but this is expected to be a very small proportion.

Unless a large proportion of the vehicles targeted for inspection by the CVU and IHTF are exempt from fitment of cycle safety equipment, or these vehicles have been targeted because of the absence of the equipment, these figures suggest that vehicles, in particular those in the haulage and other and unknown industries, are more likely to be committing an offence where cycle safety equipment is not fitted when it should have been. This suggests that targeting vehicles from the haulage industry and providing education to these operators on the fitment of cycle safety equipment may help to increase the fitment of this equipment in the fleet, potentially reducing the number and severity of collisions between HGVs and pedal cycles.

- Analysing data from the most recent reporting period (July-October 2014) shows that:
 - the most commonly inspected vehicle type is rigid vehicles operating in the construction industry (30% of inspections)
 - the large number of rigid vehicle inspections is likely to be at least partially due to the specific focus of the IHTF on the construction and waste industries
 - cycle safety equipment was fitted to at least 70% of vehicles inspected from the recycling and waste, transport and logistics and construction industries, whereas it was present for less than 15% of inspections on vehicles from the haulage and 'other and unknown' industries

4.1.2 Inspection outcomes

Overall, 74% of inspections were not recorded as satisfactory (i.e. had at least one offence recorded). As inspections are targeted, this is likely to be a much higher proportion than would be seen in the general vehicle population within London. DVSA carry out an unbiased Fleet Compliance Check across Great Britain each year. The latest report (In House Analytical Consultancy, 2014) states that:

- 25.1% of GB vehicles had a roadworthiness defect (28.8% of non-GB vehicles)
- 21.1% of trailers towed by GB vehicles had a roadworthiness defect (28.4% of trailers towed by non-GB vehicles)
- 13.4% of drivers and operators of GB vehicles were found to be committing a traffic offence (13.8%)⁶.

As expected, due to the targeted nature of the CVU and IHTF's current inspections, the general level of non-compliance in Great Britain is much lower than seen in this analysis. Compliance levels specifically within the London fleet are currently unknown; however, a non-biased survey is due to be conducted later in 2015.

The construction, recycling and waste, and haulage industries had the highest percentage of unsatisfactory stops with 79%, 78% and 74% of inspections resulting in an unsatisfactory stop respectively. The transport and logistics industry had the lowest percentage of unsatisfactory stops (67%) followed by the other and unknown category with 69% of stops recorded as unsatisfactory. This may suggest that the construction,

⁶ Data are only available for GB and non-GB separately, and for vehicles and trailers separately. Roadworthiness offences relate to mechanical compliance and traffic offences relate to drivers' hours and other process-related issues.

recycling and waste, and haulage industries are less compliant and should therefore be targeted further. Alternatively it might be that the inspectors are better at identifying potentially non-compliant vehicles in these sectors.

1.7% of recycling and waste inspections, 1.1% of construction inspections and 1.1% of other and unknown industry inspections resulted in the vehicle being seized. Again, these percentages are likely to be higher than would be expected in the general vehicle population due to the vehicles being targeted for inspection.

4.1.2.1 Country of origin

Ten percent of the vehicles stopped were from countries other than Great Britain. Comparing the GB vehicles to the non-GB vehicles shows that vehicles registered within GB were more likely to have an unsatisfactory stop (74% compared to 69% of vehicles from outside of GB). Almost all vehicles (96%) with an unknown origin recorded an unsatisfactory stop. These findings don't agree with those from the Fleet Compliance Check reported above, where non-GB vehicles are more commonly found to have roadworthiness defects or traffic offences. This may be a result of the manner in which vehicles are targeted for inspection.

4.1.2.2 Vehicle age

Figure 10 shows the proportion of inspections which were not classified as satisfactory by age of vehicle.

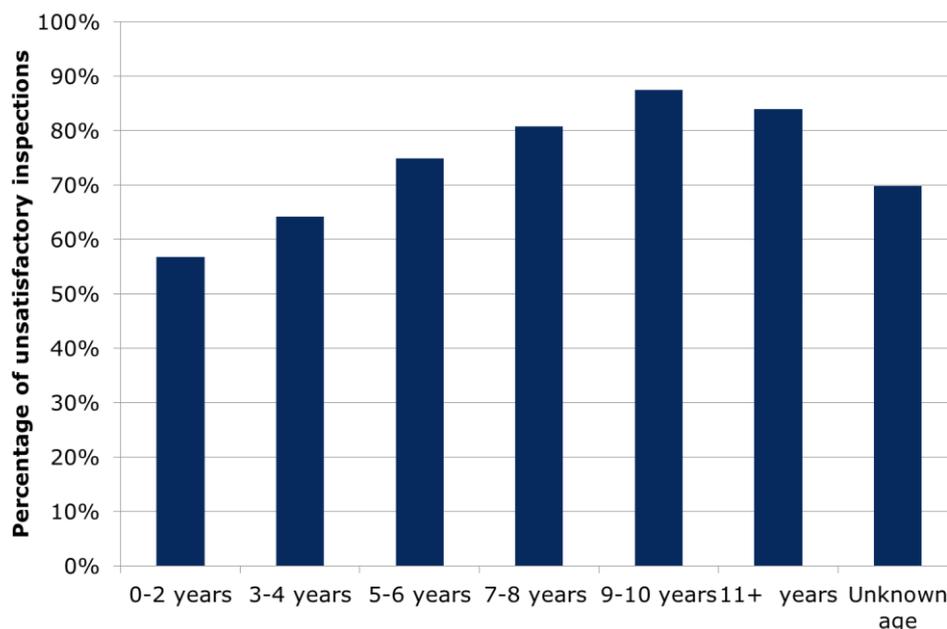


Figure 10. Percentage of unsatisfactory inspections by age of vehicle

Newer vehicles were found to be more compliant (had a lower proportion of unsatisfactory inspections) than older vehicles. This may suggest that older vehicles (6+ years) should be targeted for inspection.

4.1.2.3 Fleet Operator Recognition Scheme (FORS)

Table 5 shows whether stops were recorded as satisfactory or unsatisfactory for vehicles with and without FORS accreditation.

Table 5. Percentage of vehicles with a satisfactory stop by FORS accreditation

FORS accreditation	Satisfactory stop	
	Yes	No
Yes	27%	73%
No or unknown	26%	74%

There were almost equal proportions of unsatisfactory stops for both FORS accredited and non-FORS or unknown accreditation vehicles (73% and 74% respectively). This may suggest that in general, non-compliance is equally prevalent in both FORS accredited and non-accredited vehicles. However, as seen in Section 4.1.1, fewer FORS accredited vehicles were targeted than non-accredited vehicles suggesting that they are less likely to be identified as possibly non-compliant.

- Between July and October 2014 the CVU and IHTF data shows that:
 - overall, 74% of inspections were not recorded as satisfactory. As inspections are targeted, this is likely to be a much higher proportion than would be seen in the general vehicle population within London
 - older vehicles were identified as a group in which non-compliance was more common

4.1.3 Offences

The offences recorded relating to ADR⁷, overweight vehicles, Construction and Use, drivers' hours and other offences are described below.

4.1.3.1 International Carriage of Dangerous Goods by Road

Twenty-nine of the 2,811 inspections were recorded as ADR stops. Twenty-four of these were for vehicles in the 'other and unknown' industry category. There were eight ADR offences and four ADR prohibitions recorded, all for vehicles in the 'other and unknown' industry category. There were no ADR offences or prohibitions in the other vehicle industries. Thirteen inspections (over a few industries) resulted in an ADR advice or warning (some of which did not have an offence recorded).

4.1.3.2 Overweight

The percentage of vehicles being given prohibitions for being overweight was low, ranging from 0% for vehicles in the recycling and waste industry to 2% for vehicles in the transport and logistics industry.

⁷ 'Accord Dangereux Routier' or the "European Agreement concerning the international carriage of Dangerous goods by Road"

4.1.3.3 Construction and Use

Figure 11 shows the proportion of inspections which resulted in a prohibition for construction and use (C&U) offences, the proportion which resulted in an insecure load offence and the proportion which resulted in advice or warning for a C&U offence by vehicle industry sector.

Note that some vehicles may have been issued with more than one offence in a category; for example one vehicle may have had two C&U prohibitions or offences in multiple categories (for example both a C&U prohibition and an insecure load offence).

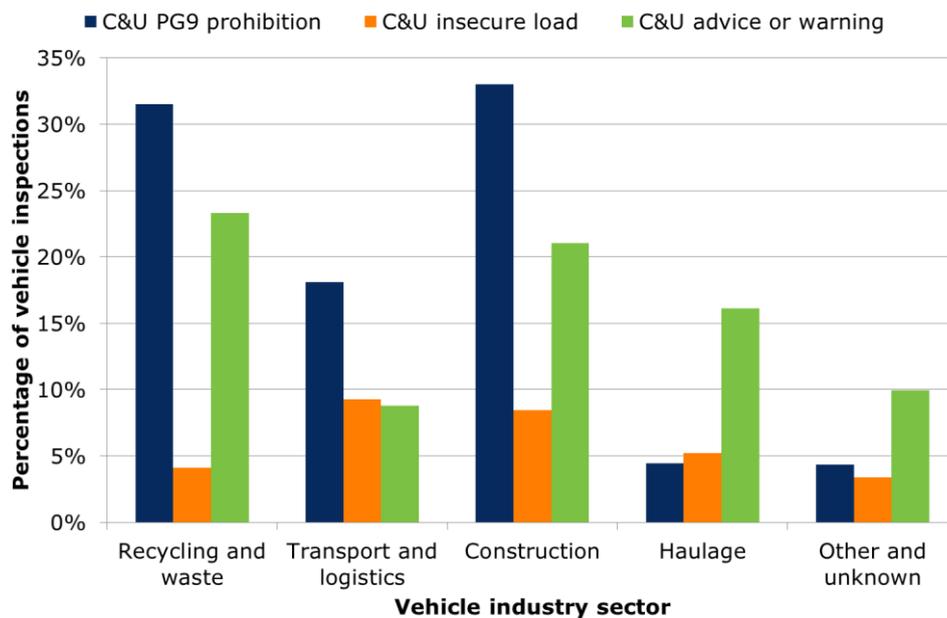


Figure 11. Percentage of vehicles with C&U offences

The recycling and waste and construction industries had the most prohibitions for C&U offences with 32% and 33% of inspections respectively resulting in a roadworthiness PG9 prohibition. Four percent of inspections from the haulage and other and unknown categories resulted in PG9 prohibitions. This suggests that current targeting (particularly by the IHTF) on the construction and waste industries appears to be effective in identifying vehicles with C&U offences.

The transport and logistics and construction industries had the highest percentage of inspections resulting in an insecure load offence.

23% of inspections on vehicles from the recycling and waste industry and 21% of inspections on vehicles from the construction industry resulted in advice or a warning regarding C&U.

The IHTF utilise the Operator Compliance Risk Score (OCRS) system to target vehicles whose operators score highly on one of two scoring systems: roadworthiness and traffic related offences. The following analysis is restricted to the IHTF data from July to October 2014 (815 inspections) as the OCRS is not available for the CVU data over the same period. In total 86% of the vehicle stopped by the IHTF had an associated roadworthiness and traffic OCRS.

Figure 12 shows the proportion of vehicles inspected which had a C&U prohibition by OCRS.

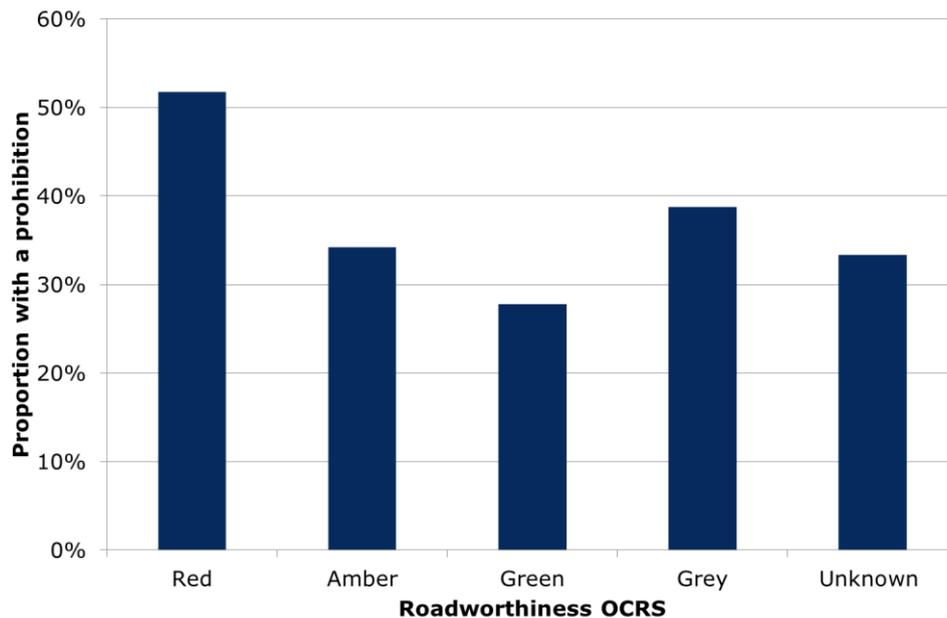


Figure 12. Proportion of vehicles with a C&U prohibition by roadworthiness OCRS

A smaller proportion of vehicles given a green roadworthiness OCRS were given a C&U prohibition (28%) compared to vehicles with amber or red OCRSs (34% and 52% respectively). This suggests that the roadworthiness OCRS is effective in identifying operators whose vehicles are likely to be non-compliant. As a result, in order to target vehicles more effectively, consideration should be given to utilising the OCRS more and perhaps extending its use to the CVU.

4.1.3.4 *Drivers' hours*

Figure 13 shows the proportion of drivers issued with a prohibition, summons, advice or warning and graduated fixed penalty notice (GFPN) for a drivers' hours offence.

Note that some drivers may have been issued with more than one offence in a category, for example one driver may have had two drivers' hours prohibitions, or offences in multiple categories, for example one driver may have been issued with both a drivers' hours prohibition and a GFPN.

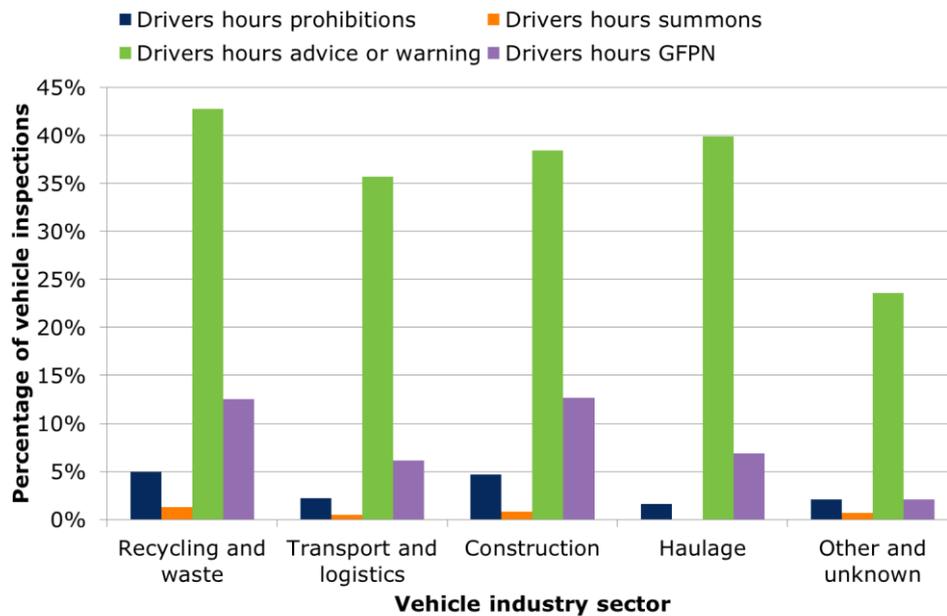


Figure 13. Percentage of drivers with drivers' hours offences

On the whole, the recycling and waste and construction industries had the highest percentage of drivers' hours offences. Five percent of inspections from each of these industries resulted in a drivers' hours prohibition (compared with 3% over all industries), 1% of inspections from each resulted in a summons and 13% from each resulted in a GFPN (compared with 9% over all industries).

Receiving advice or a warning regarding drivers' hours was far more common across all the industry sectors than a prohibition, summons or GFPN. This was most common for the recycling and waste industry and the haulage industry, with advice or warning regarding drivers' hours resulting from 43% and 40% of inspections respectively.

These results suggest that drivers' hours offences are similarly common across all industry sectors and that no particular industry should be targeted specifically for this offence.

The following analysis is restricted to the IHTF data from July to October 2014 (815 inspections) as the OCRS is not available for the CVU data over the same period. Figure 14 shows the proportion of vehicles given a drivers' hours prohibition by traffic OCRS.

The proportion of vehicles with a green score recorded with a prohibition for drivers' hours offences is substantially less than those with a red score. Similarly to the roadworthiness OCRS above, this suggests that the traffic OCRS is effective in identifying operators whose drivers are likely to be committing offences. As a result, consideration should be given to increasing the utilisation of this system, as a way of targeting non-compliant drivers.

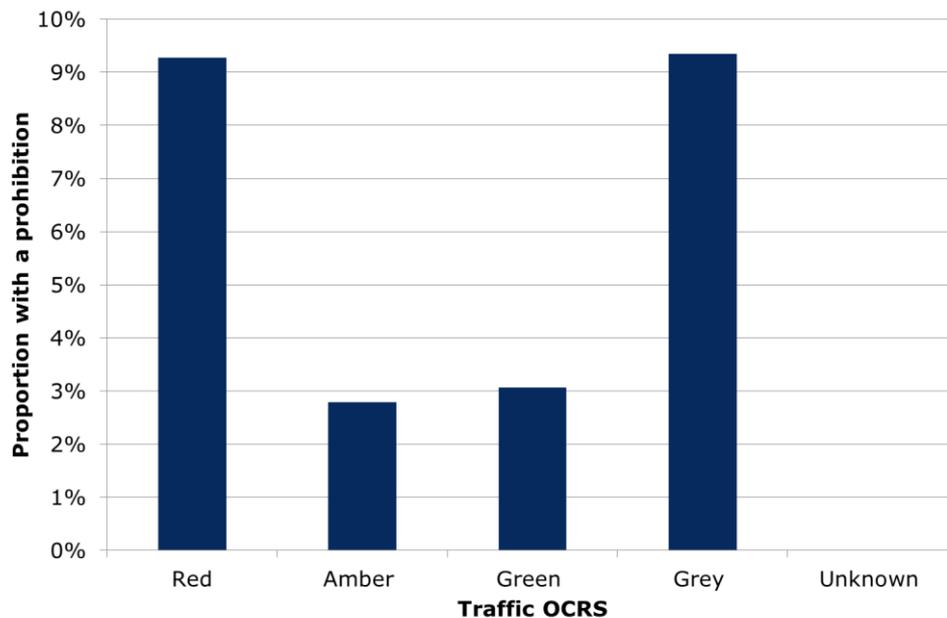


Figure 14. Proportion of vehicles with a drivers' hours prohibition by traffic OCRS

4.1.3.5 All other offences

The proportion of inspections which resulted in other offences including CPC, operator licence, mobile phone, seatbelt, driving licence and insurance offences are displayed in Figure 15. Note that a vehicle may have recorded offences in one or more categories.

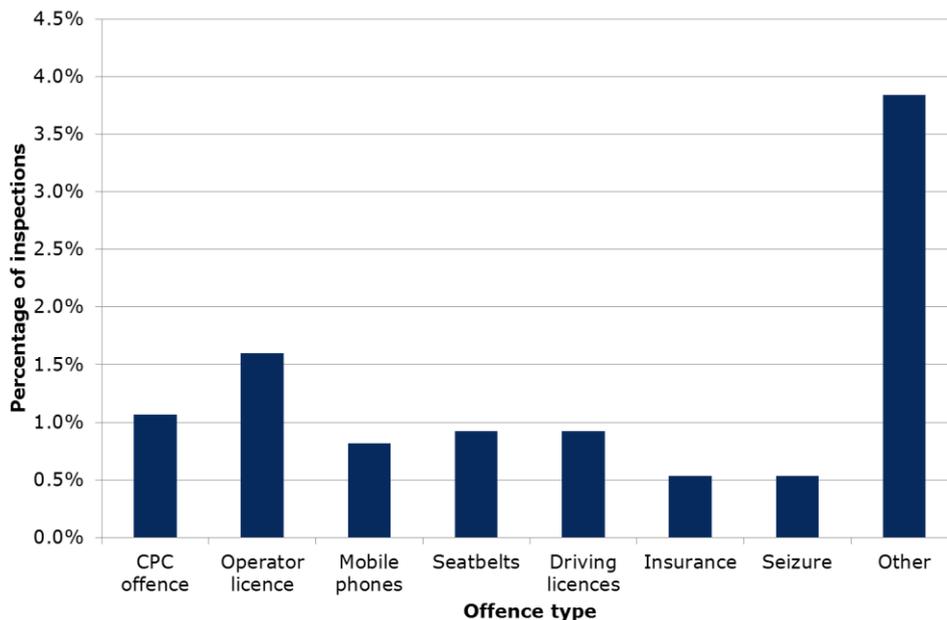


Figure 15. Percentage of vehicles with other offences

Other than the category 'all other offences - other', operator licence offences were the most common other offence over all industry sectors with 1.6% of inspections having an operator licence offence recorded. The haulage industry had the largest percentage of operator licence offences, followed by recycling and waste with 2.4% and 2.2% of inspections in these industries identifying an offence respectively.

CPC and driving licence offences were more common in the recycling and waste and construction industries than in the other industries. CPC offences accounted for 1.7% of recycling and waste inspections and 1.6% of construction inspections compared with 1.1% overall. Driving licence offences accounted for 1.7% of recycling and waste inspections and 1.2% of construction inspections.

Mobile phone offences accounted for less than 0.5% of inspections in all industries except 'other and unknown' where they accounted for 2.7% of inspections. Similarly, insurance offences accounted for less than 0.7% of inspections for all sectors except other and unknown where they were identified in 1.0% of inspections.

Seatbelt offences were more common for the haulage and other and unknown industry sectors than the other sectors. 1.6% of haulage inspections and 1.3% of other and unknown industry inspections identified a seatbelt offence.

These results may suggest that:

- The haulage and recycling and waste sectors should be targeted regarding operator licence offences
- The construction and recycling and waste sectors should be targeted regarding CPC and driving licence offences
- The haulage sectors should be targeted regarding seatbelt offences

- Between July and October 2014 the CVU and IHTF data show that:
 - very few vehicles inspected were issued with prohibition notices for offences relating to the international carriage of dangerous goods or overweight offences
 - Construction and Use PG9 prohibitions and advice and warnings were the most common outcomes of the inspections; 32% of inspections on vehicles in the recycling and waste industry and 33% of construction inspections resulted in a construction and use PG9 prohibition
 - drivers' hours offences were most common for vehicles in the recycling and waste and construction sectors; 5% of inspections on vehicles from both industries resulted in drivers' hours prohibitions and 13% resulted in GFPNs. Advice or warnings for drivers' hours offences were much more common than prohibitions or GFPNs (35% of inspections across all the industry sectors)
 - less than 3% of inspections had an 'other offence' (e.g. operator licence, mobile phone or seatbelt offence) recorded

4.2 Trends – all datasets

For the purposes of this analysis, comparable fields from different datasets have been combined to allow for trends over time to be examined. Data were restricted to inspections by the CVU; the IHTF only commenced operations in October 2013 and therefore long term trend analysis is not possible. In addition, the IHTF focuses on targeting vehicles from the construction and waste industries, where non-compliance rates are believed to be higher, and therefore inclusion of these data could skew results.

4.2.1 Summary of vehicles inspected

Figure 16 shows the vehicles inspected in the CVU data by vehicle type and dataset. LGVs were added to the vehicle types specified in January 2014 and trailers were specified from July 2014; prior to these dates it is believed that these vehicle types would have been recorded as 'other and unknown'.

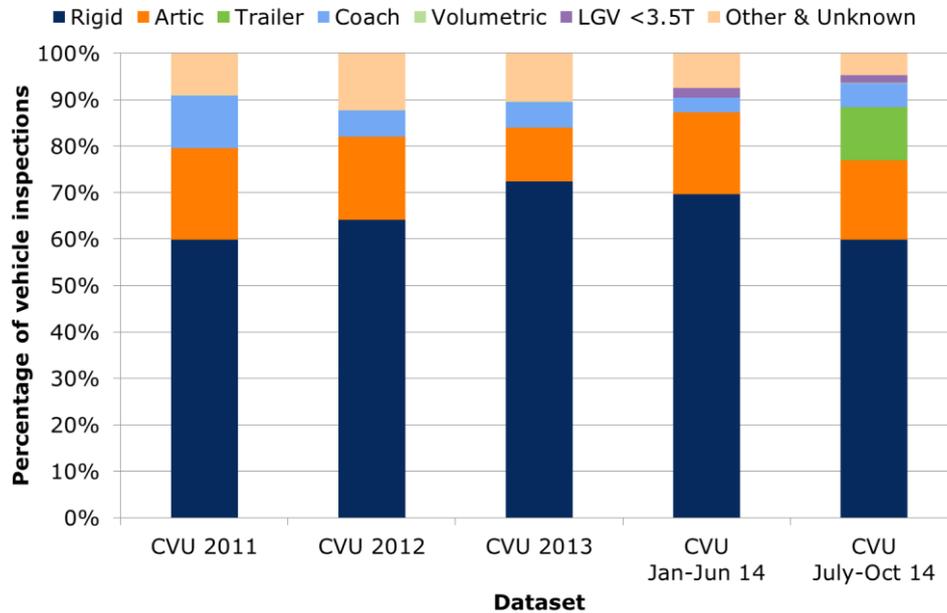


Figure 16. Percentage of vehicle inspections by vehicle type and dataset

The proportion of vehicles inspected that were rigid HGVs increased from 2011 to 2013 but has fallen in 2014.

In 2011 the proportion of vehicles inspected from Great Britain was 88%, by 2013 this had increased to 96%, and by 2014 this had decreased again to 87%.

Figure 17 shows the proportion of vehicle inspections by vehicle age.

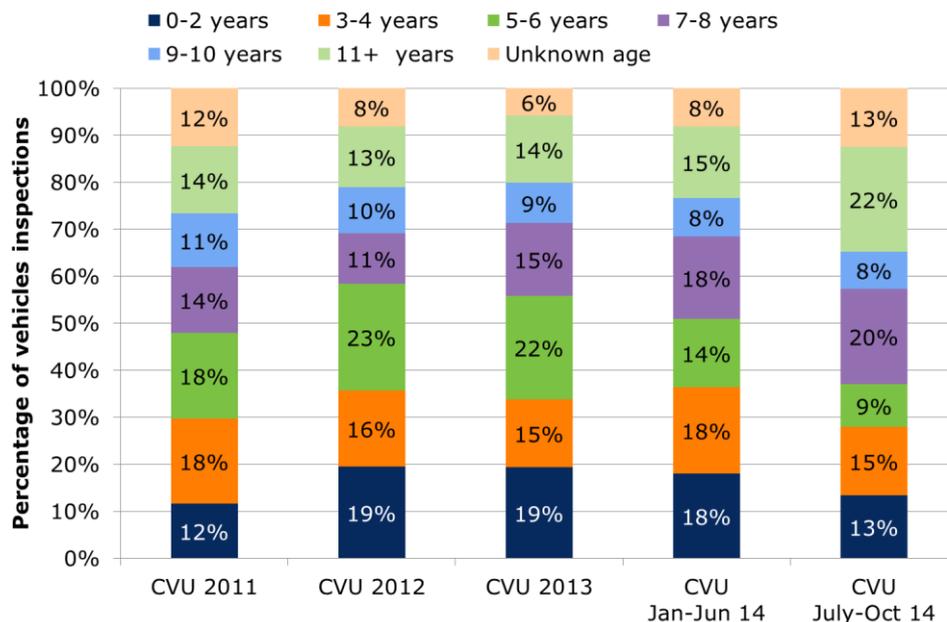


Figure 17. Percentage of vehicle inspections by vehicle age and dataset

Vehicles inspected between July and October 2014 were older than those inspected previously: 22% were 11 years or older compared with between 13% and 15% in the earlier datasets.

- Analysing CVU data from January 2011 to October 2014 shows that:
 - the proportion of vehicles inspected that were rigid HGVs increased from 2011 to 2013 but has fallen in 2014
 - vehicles inspected between July and October 2014 were older than those inspected in previous years

4.2.2 Inspection outcomes

Figure 18 shows the percentage of inspections from each dataset that did not result in a satisfactory stop (i.e. resulted in some kind of warning or non-compliance).

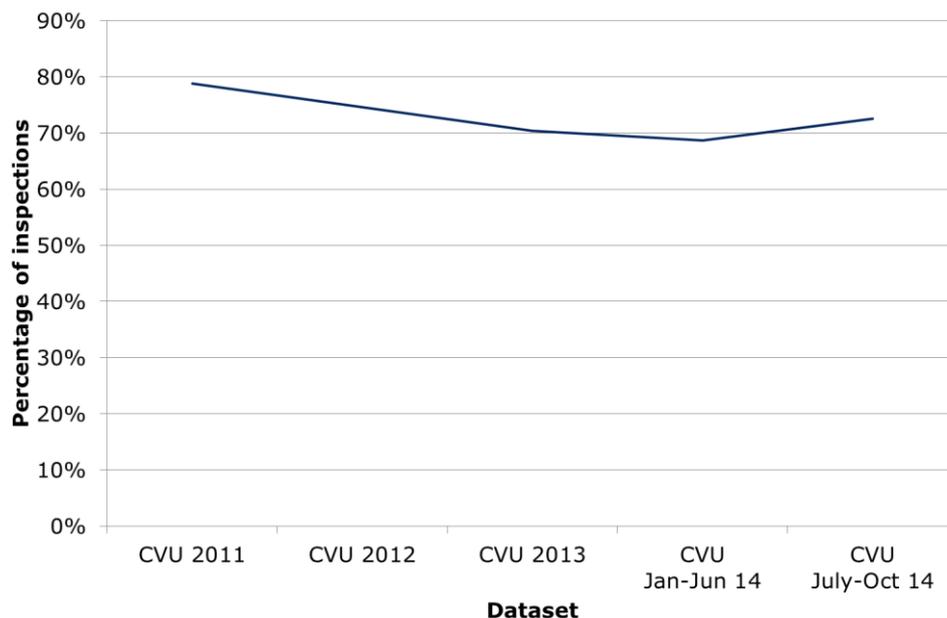


Figure 18. Percentage of inspections resulting in an unsatisfactory stop

This percentage has been reducing since 2011, however, the most recent dataset (July-October 2014) shows an increase from the January-June 2014 data.

Since the CVU inspections are targeted, it is unknown whether this trend matches with the trend of non-compliance in vehicles more generally across the road network within London or whether this is the result of a change to the CVU’s targeting methods (e.g. inspecting more older vehicles, which have been shown in Section 4.1.2.2 to be associated with higher levels of non-compliance).

However, as a comparator, the DVSA Fleet Compliance Check Report for Great Britain (In House Analytical Consultancy, 2014) shows that in an unbiased survey of GB vehicles, the proportion of vehicle roadworthiness offences, trailer roadworthiness offences and traffic offences have all reduced slightly between 2011 and 2013. No data are currently available for 2014.

The proportion of inspections resulting in the vehicle being seized is small; however, it does seem to be showing a decline since 2011. In the CVU data for 2011, 1.7% of

inspections resulted in a vehicle being seized compared with 0.9% in the CVU data for July-October 2014.

- Analysis of the CVU data between January 2011 to October 2014 shows that the percentage of inspections from each dataset that resulted in an unsatisfactory stop has shown a general decline since 2011, i.e. the vehicles inspected appear to be more compliant over time
- However, since the inspections are targeted, it is unknown whether this trend matches with the trend of non-compliance in vehicles more generally across the London network or whether this is the result of a change to the CVU's targeting methods

4.2.3 Offence types

4.2.3.1 Overweight

Figure 19 shows the percentage of CVU inspections resulting in a prohibition due to a vehicle being overweight, by dataset.

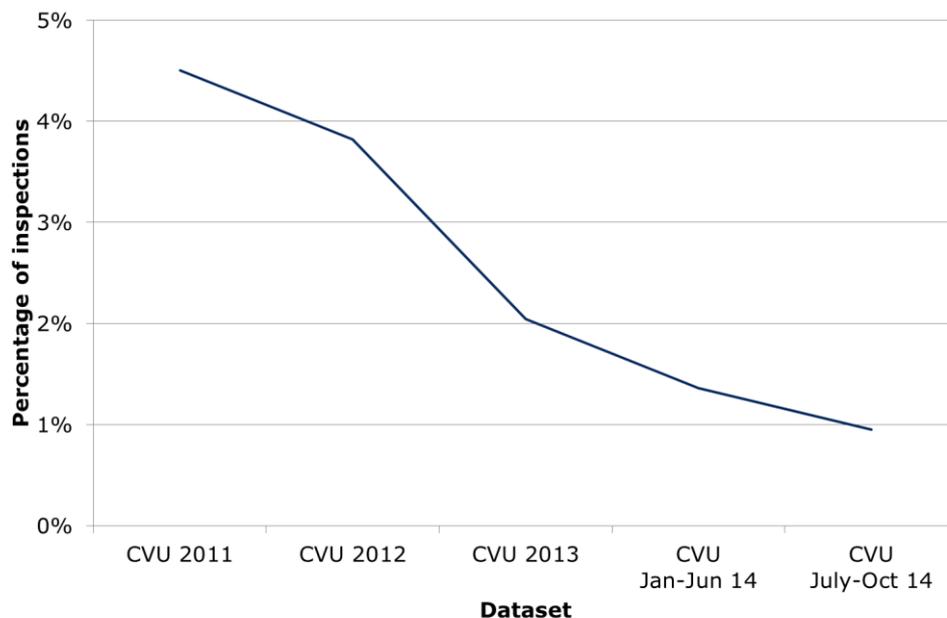


Figure 19. Percentage of inspections resulting in a prohibition for being overweight

This percentage has fallen with each dataset from 4.5% in 2011 to less than 1% between July and October 2014.

It is unclear why this reduction has occurred. It is possible that the prevalence of such offences is dropping. However there have been changes to the way in which this field is reported over this period and there may have been changes in the way vehicles are targeted for inspections.

4.2.3.2 Construction and Use

Figure 20 shows the percentage of offences that resulted in PG9 prohibitions or advice or a warning being given.

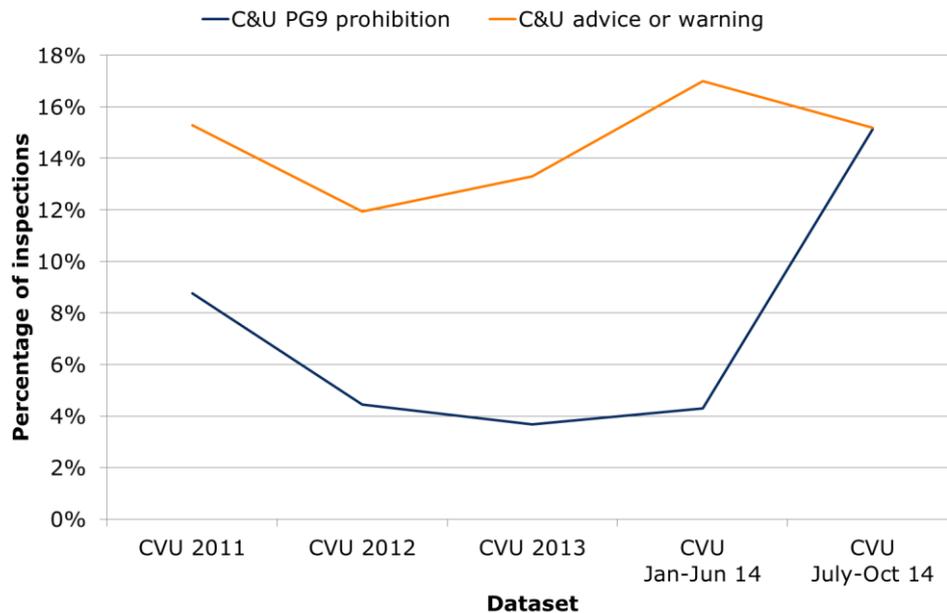


Figure 20. Percentage of inspections resulting in C&U offences

Advice and warnings relating to C&U offences were far more common than PG9 prohibitions for all datasets except July-October 2014 when 15% of inspections resulted in each.

There was a dramatic increase in the proportion of inspections resulting in a PG9 prohibition between the January-June 2014 dataset and the July-October 2014 dataset. It is unclear why this occurred; it may be the result of the way in which vehicles were targeted.

4.2.3.3 Drivers' Hours

Figure 21 shows the percentage of inspections that resulted in a drivers' hours offence.

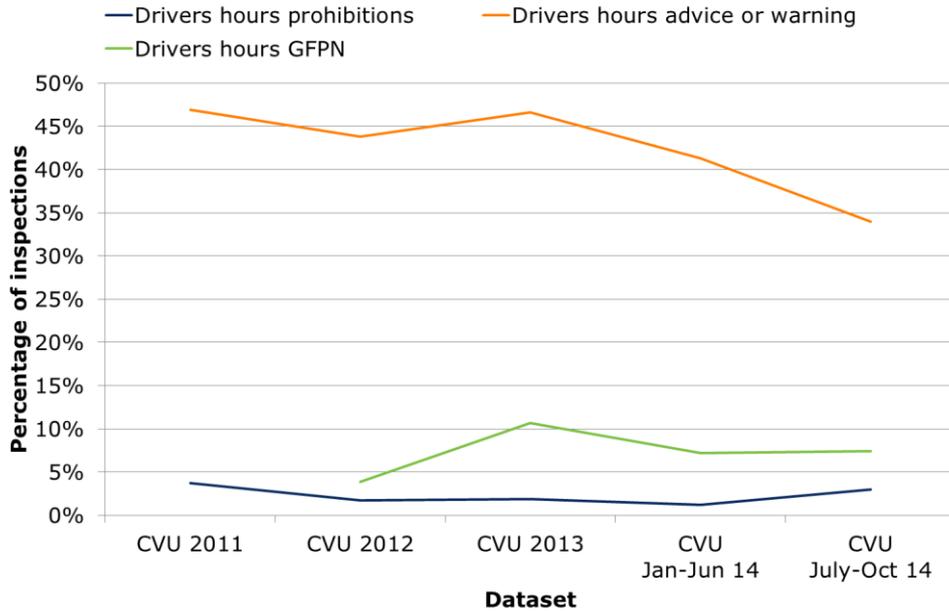


Figure 21. Percentage of inspections resulting in drivers' hours offences

A high proportion of inspections (47% in 2011) resulted in advice or a warning being given, although, this has been falling since 2013. Relatively few prohibitions or graduated fixed penalty notices (GFPNs) are issued each year.

4.2.3.4 All other offences

Figure 22 shows the percentage of inspections from each CVU dataset that resulted in any other offence.

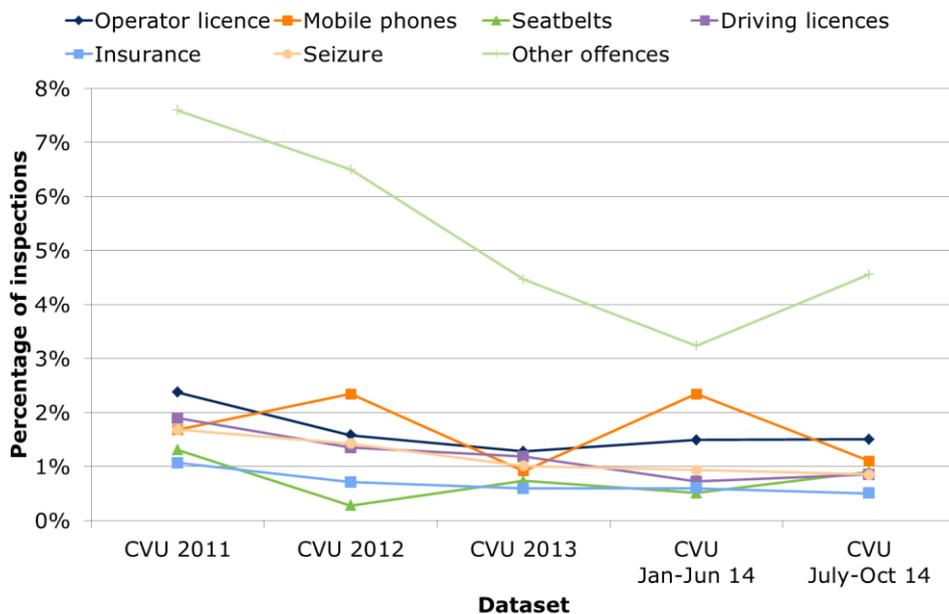


Figure 22. Percentage of inspections resulting in other offences

It is unclear what is included in the category 'any other offence – other', but there appears to be a substantial reduction of these offences from 2011 to June 2014.

The proportion of inspections resulting in insurance offences is small; however, it does seem to be showing a decline since 2011. In 2011, 1.1% of inspections resulted in an insurance offence compared with 0.5% between July and October 2014.

The other 'all other offences' categories show little trend.

- Analysis of the CVU data between January 2011 to October 2014 shows that:
 - the percentage of inspections resulting in a prohibition due to a vehicle being overweight has fallen
 - there is no clear trend in construction and use offences
 - the percentage of inspections that resulted in advice or a warning being given for a drivers' hours offence has fallen from 2011 to 2014. Relatively few prohibitions or GFPNs are issued each year for this offence
 - there was a reduction in the 'all other offences - other' category from 2011 to June 2014. The other 'all other offences' categories showed little trend

4.3 Analysis of Stats19 collision data

Stats19 data were analysed to gain further insight into how non-compliance may be associated with injury collisions.

4.3.1 Collisions involving HGVs

In London between 2005 and 2013, 6,565 HGVs were involved in 6,364 road collisions, accounting for 3% of the total number of road collisions in this area and time frame. Within the collisions that involved an HGV there were 7,235 casualties of which 85% were slightly injured, 12% were seriously injured, and 3% were fatally injured. These fatalities account for approximately 12% of the total number of road fatalities in London from 2005 to 2013.

Table 6 shows the proportion of casualties in collisions that involve an HGV, broken down by severity and whether the casualty was a pedestrian, an occupant of a different vehicle, or an occupant of an HGV.

Table 6. Casualties by vehicle occupancy and injury severity

User group	Number of casualties	% of total casualties	% of casualties killed or seriously injured
Pedestrians	848	12%	39%
Pedal cyclists	866	12%	26%
Other motor vehicle ⁸ occupants	4,837	67%	9%
HGV's occupants	684	9%	11%
Total	7,235	100⁹%	15%

⁸Including but not limited to, cars, taxis, buses, motorcycles, and LGVs

Separating out the data in such a way demonstrates that the highest percentage of casualties in HGV collisions were occupants of a vehicle other than the HGV (67%), but a relatively low proportion of these casualties were killed or seriously injured. Pedestrians had the highest proportion of fatalities and serious injuries, making up 39% of all reported pedestrian casualties. Pedal cyclists also have a high proportion of casualties killed or seriously injured (26%) compared with car and HGV occupants. The fact that pedestrians and pedal cyclists are often more severely injured than vehicle occupants in collisions involving an HGV is unsurprising due to the nature of the forces involved and the protection that a vehicle offers.

The casualty figures in Table 6 are influenced by the traffic volumes of each vehicle category. As cars represent a much higher proportion of London traffic than pedal cycles, these vehicles are more likely to meet and interact with HGVs resulting in a collision. Casualty rates account for the traffic in order to estimate the risk of injury to an individual in a collision with a HGV per mile travelled.

Figure 23 displays the casualty rates of pedal cyclists, occupants of non-HGV motor vehicles, and occupants of HGVs. The casualty rate for pedestrians has been excluded from the graph as pedestrian traffic is notoriously hard to estimate.

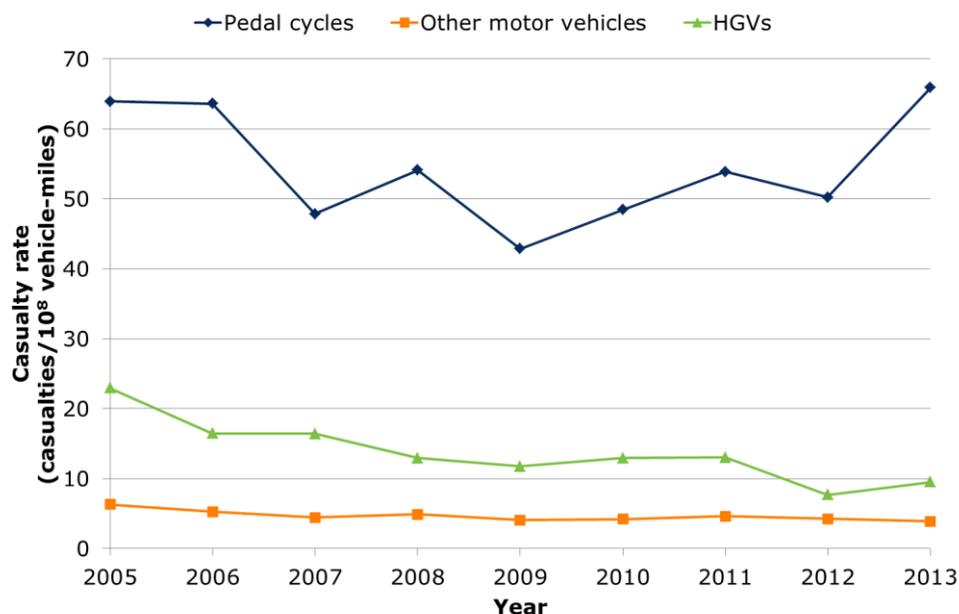


Figure 23. Casualty rates by year

The graph shows that pedal cyclists have a much higher frequency of casualties per vehicle-mile compared to HGVs and other motor vehicles.

- HGVs are involved in only 3% of road collisions but these collisions account for 12% of fatalities
- The injuries in HGV collisions are generally sustained by people other than the HGV occupants, in particular by pedestrians or pedal cyclists involved in the collision

⁹ Percentages may not sum to 100% due to rounding

4.3.2 Contributory Factors

Since 2005, contributory factors have been recorded nationally as part of Stats19. Each collision can have up to six contributory factors. They are not recorded in any order, but an indication is given as to whether each factor is very likely or possible. The vehicle or casualty to which the factor applies is also given. One contributory factor can be recorded for more than one vehicle/casualty, and each vehicle/casualty can have none, one, or more contributory factors. These factors reflect the opinion of the reporting officer and may not be the result of extensive investigation.

The contributory factors are split into nine different categories: road environment, vehicle defects, injudicious actions, driver/rider error or reaction, impairment or distraction, behaviour or inexperience, affected vision, pedestrian factors, and special factors such as 'stolen vehicle'.

For the following analysis, only collisions where the police attended the scene were included¹⁰.

Of the 6,364 collisions in London that involved at least one HGV, 5,238 collisions were attended by the police and had a contributory factor associated with a vehicle or casualty in the accident. Of the 5,424 HGVs involved in collisions with at least one contributory factor, 3,794 (70%) were assigned a contributory factor by the police; 1.9% of HGVs given a contributory factor had a vehicle defect contributory factor.

Figure 24 and Table 7 show the number of HGVs involved in collisions by year as well as how many HGVs had police attendance at the collision, how many had contributory factors, and how many of these were vehicle defects.

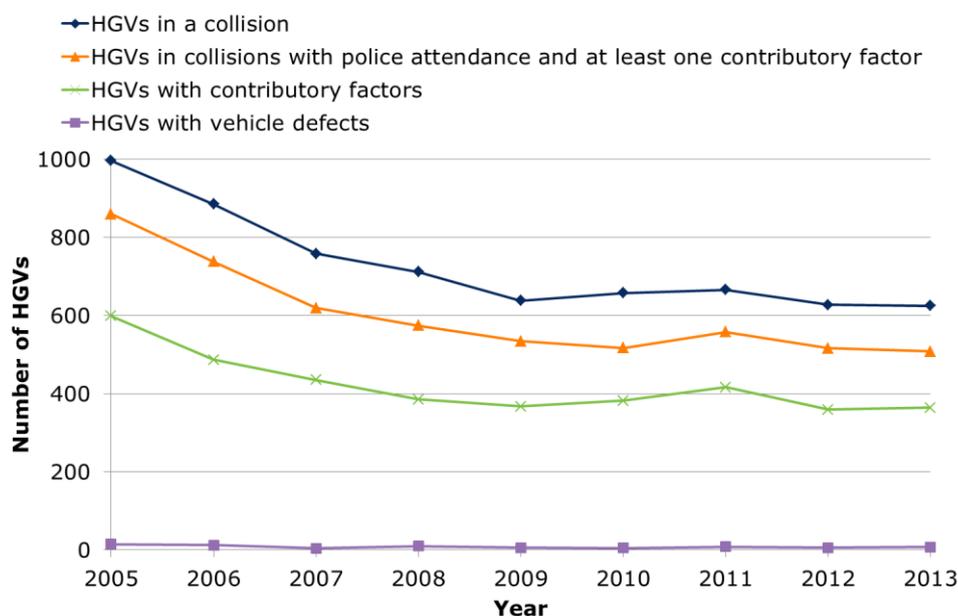


Figure 24. Number of HGVs in collisions and with contributory factors by year

In the majority of groups there was a strong declining trend between 2005 and 2009 and then remained relatively stable with a small peak around 2011. By 2013, the number of

¹⁰ Stats19 includes all injury collisions reported to or by the police. The police do not necessarily attend all injury collisions.

HGVs involved in an accident had reduced by 37%, the number of HGVs with a contributory factor had decreased by 38% and the number of HGVs with a vehicle defect had decreased by 53% from 2005. This may suggest that HGV defects are not contributing to as many collisions as they were in 2005; however, the HGV results are based on small numbers and therefore this finding may be due to random variation.

Table 7. Number of HGVs in collisions and with contributory factors by year

	2005	2006	2007	2008	2009	2010	2011	2012	2013	Total
HGVs in collisions	996	885	758	712	638	658	666	627	625	6,565
HGVs in collisions attended by police and with at least one factor	860	738	619	574	534	517	558	516	508	5,424
HGVs with contributory factors	637	522	458	412	399	406	439	384	393	4,050
Injudicious action factors	186	135	110	75	90	87	79	78	88	928
Road environment factors	7	13	13	16	9	14	8	10	18	108
Driver error/reaction factors	488	414	354	317	312	336	360	314	316	3,211
Impairment or distraction factors	16	13	11	14	17	16	12	8	11	118
Behaviour or inexperience factors	195	207	144	73	70	84	129	88	110	1,100
Pedestrian factors	59	60	51	50	59	46	53	69	51	498
Affected vision factors	60	83	65	60	75	73	95	92	78	681
Special factors	23	24	14	10	17	13	11	9	12	133
HGVs with vehicle defects	15	12	4	10	6	5	8	6	7	73

Table 7 shows that substantially fewer HGVs involved in collisions were given a vehicle defect contributory factor than a number of the other factor groups. The most common contributory factors allocated to HGVs were driver errors or reactions. This is not unusual as this category is reported as the most frequently used category in GB (with 72% of accidents with at least one contributory factor reporting this in 2012) (Department for Transport, 2014).

Table 8 shows the number of HGVs involved in collisions with each vehicle defect factor.

Table 8. Vehicle defect factors present in HGV collisions

Contributory factor	HGVs with factor	Proportion
Tyres illegal, defective or under inflated	8	11.0%
Defective lights or indicators	3	4.1%
Defective brakes	18	24.7%
Defective steering or suspension	2	2.7%
Defective or missing mirrors	1	1.4%
Overloaded or poorly loaded vehicle or trailer	44	60.3%
HGVs with vehicle defects recorded as contributory	73 ¹¹	100.0%

Over half of the HGVs assigned a vehicle defect had issues with load weight or restraint. This may indicate that more focus should be given by the CVU and IHTF to targeting and inspecting vehicles which are overweight. The second most common vehicle defect was defective brakes.

Comparing HGV collisions with car collisions (attended by the police and with at least one contributory factor recorded) 1.3% of HGVs and 0.5% of cars had a vehicle defect recorded as contributory to the collision. This indicates that either:

- HGVs with vehicle defects are more commonly on the road than cars with vehicle defects, or
- HGV defects are more likely to cause a collision, or
- The police attending the accident scene more commonly record HGV defects.

More generally, 61% of cars in a collision (attended by the police where the collision included a contributory factor) had a contributory factor assigned, compared with 70% of HGVs. This may indicate that HGVs are more likely to be at fault in road collisions, but again it is also possible that such defects are more readily recorded.

- 70% of HGVs in collisions attended by the police had at least one contributory factor recorded
- Most commonly contributory factors were related to driver error or reaction but a small percentage of HGVs (2%) had factors related to vehicle defects
- The most common vehicle defect factors were overloaded or poorly loaded vehicle or trailer, followed by defective brakes

¹¹ This column does not sum to 73 since vehicles may have more than one vehicle defect recorded

4.4 Recommendations

This analysis of targeted data has resulted in some recommendations related to how vehicles should be targeted in the future; however, these results are based on biased data and therefore may arise as a result of the way in which vehicles are identified for inspection, rather than due to the variable of interest. The intention is that these recommendations for targeting can be verified using the unbiased survey which will be reported later in 2015. The data have suggested that:

- Targeting vehicles from the haulage industry and providing education to these operators on the fitment of cycle safety equipment may help to increase the fitment of this equipment in the fleet, potentially reducing the number and severity of collisions between HGVs and pedal cycles
- The construction, recycling and waste, and haulage industries are less compliant than other industries and should therefore be targeted further
- Older vehicles (aged 6+) should be targeted over newer vehicles
- Current targeting (particularly by the IHTF) on the construction and waste industries appears to be effective in identifying vehicles with construction and use offences, and should continue
- The haulage and recycling and waste sectors should be targeted regarding operator licence offences
- The construction and recycling and waste sectors should be targeted regarding CPC and driving licence offences
- The haulage sector should be targeted regarding seatbelt offences
- The OCRS is an effective way to identify operators whose vehicles are likely to be non-compliant. Consideration should be given to utilising the OCRS more and perhaps extending its use to the CVU
- Overloaded HGVs feature frequently in the collision data (relative to the other possible vehicle defects) which may indicate that more focus should be given by the CVU and IHTF to targeting and inspecting these vehicles

In order to gain a fuller understanding of the true levels of non-compliance among HGVs operating in London the MPS CVU and the CoLP carried out non-targeted stops across a range of locations in London, and recorded any non-compliance found.

The results from these inspections are presented in Section 5.

5 Analysis of non-targeted stop data

Due to the targeted nature of the normal CVU and IHTF inspections, they are likely to record a higher level of non-compliance than would be expected in the general vehicle population. The Metropolitan Police Service (MPS) and City of London Police (CoLP) therefore carried out a survey of non-targeted roadside inspections to help TfL get a better idea of the level of non-compliance in the wider fleet in London.

City of London Police described their procedure for completing the non-targeted roadside inspections:

"The stopping officer would monitor the traffic travelling towards them. The very next commercial vehicle travelling towards them, weighing over 3500kg/displaying an Operator's Licence would be stopped. Whilst dealing with this check, other vehicles fitting this criteria would pass but as soon as inspectors had finished the stop and were available, they would again stop the next Commercial vehicle over 3500kgs/displaying an Operator's Licence. At any check point, there would be up to three officers working."

The inspections were carried out at similar locations to those used in the targeted survey. These locations were chosen to allow enough room to stop several large vehicles at a time and so that officers could work safely around the vehicles.

This analysis identifies the most common offences and evaluates if differences in the types of offence exist between vehicle and operator types (with appropriate limitations on these comparisons noted). Summaries are presented in boxes at the end of each section.

Non-target inspection data from the MPS covered the period 30th May – 31st October 2015 and data from the CoLP covered the period 1st October – 30th October 2015.

A supplementary form was designed to collect extra information that isn't routinely collected as part of the enforcement stops. This form was completed for all stops in addition to the standard vehicle inspection form and included space to record information such as vehicle defects.

Altogether there were 510 stops in the non-targeted survey; 292 by the MPS and 218 by the CoLP. 80% of the stops were carried out in October; this is largely because the CoLP was only part of the survey during October, but also because 65% of the inspections by the MPS took place in October. In the following analysis the results for the two forces are combined.

HGVs often consist of both a cab unit and a trailer. Within the data, HGV cabs and trailer units are recorded as separate inspections, which could potentially be linked by the vehicle registration mark (VRM). However, due to the free-text nature of the data this linking has not been carried out for this analysis and therefore the results should be interpreted with care as some inspections are not independent; if the HGV cab is inspected and vehicle defects are found, then it may be more likely that the trailer will also have defects associated with it.

5.1 Summary of vehicles inspected

The number of vehicles inspected by vehicle weight and vehicle type is shown in Table 9.

Table 9. Vehicles inspected by weight and vehicle type

Vehicle Weight (kg)	Rigid	Artic	Trailer	Volumetric	LGV <3.5T	Other & Unknown	Total
<=3500	0	0	1	0	0	0	1
3,501-7,500	125	1	0	0	1	8	135
7,501-18,000	125	8	2	0	0	5	140
18,001-26,000	31	28	0	0	0	3	62
26,001-32,000	63	1	2	2	0	15	83
32,001-36,000	0	0	6	0	0	0	6
36,001-44,000	3	30	34	0	0	0	67
44,000+	1	0	0	0	0	0	1
Blank or N/A	10	5	0	0	0	0	15
Total	358	73	45	2	1	31	510

As with the targeted inspections, rigid HGVs were the most common vehicle type inspected (70% of vehicles) followed by articulated HGVs (14%). Rigid vehicles typically weigh between 3.5 and 18 tonnes whilst the articulated vehicles tend to be heavier, at either 18-26 tonnes or 36-44 tonnes.

Vehicle industry sectors can be grouped into five categories: recycling and waste, transport and logistics, construction, haulage and 'other and unknown'. The 'other and unknown' category includes industries such as food and plant; however, the majority (53%) of inspections in this category were recorded as unknown industry. The distribution of the 510 inspections across these sectors is shown in Figure 25.

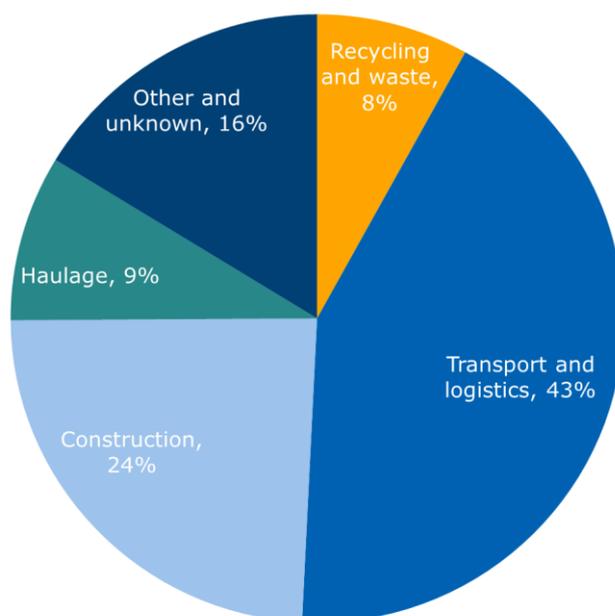


Figure 25. Distribution of inspections by vehicle industry sector

Unlike the targeted inspections, the transport and logistics industry accounted for the largest proportion of vehicles inspected with 43%. The IHTF is known to target the construction and waste industries which is likely to be the reason for the prevalence of these vehicles in targeted inspections. The distribution of the industries of the vehicles stopped during the non-targeted survey is likely to be a more accurate reflection of the HGV traffic on the roads in London.

Figure 26 shows the distribution of vehicle types between the different industry sectors.

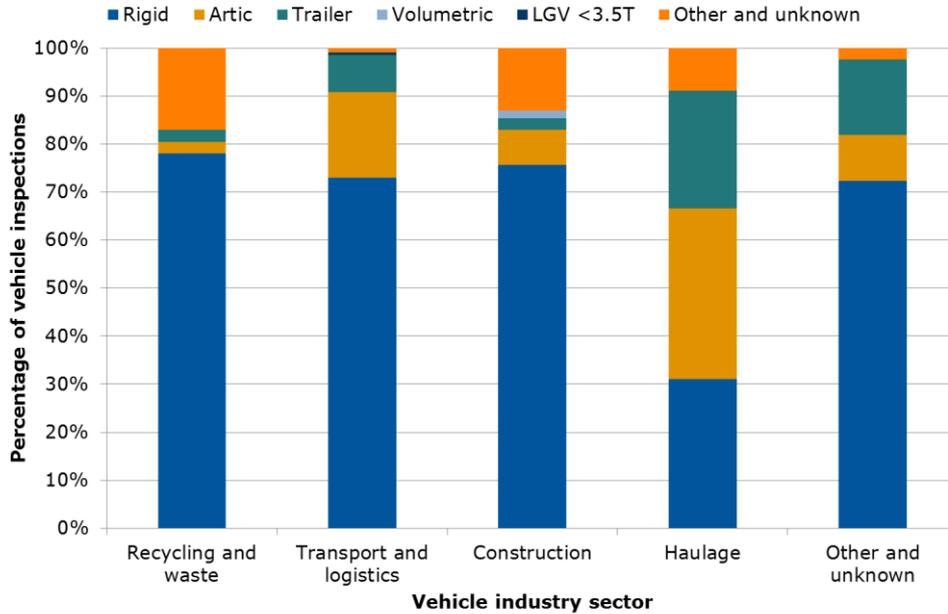


Figure 26. Vehicle types inspected from each industry sector

Rigid vehicles accounted for the majority of vehicles inspected from all industries; over 70% of inspected vehicles from all industries other than 'haulage' were rigid vehicles. As with the targeted inspections, the 'haulage' and 'transport and logistics' industries had the highest proportions of articulated vehicles (36% and 18% respectively).

The VRM was used to estimate the age of the vehicles inspected¹²; the distribution of these is shown in Table 10.

Table 10. Vehicles inspected by age

Vehicle age (years)	Number of vehicles inspected	% of vehicles inspected
0-1	39	8%
2-3	110	22%
4-5	82	16%
6-7	58	11%
8-9	72	14%
10+	55	11%
Unknown age	94	18%
Total	510	100%

Of the vehicles stopped for inspection, 27% had FORS membership. FORS is a voluntary scheme that assists operators in improving their performance in all areas of safety to aid them in complying with legislation.

5.1.1 Cycle safety equipment

Cycle safety equipment (CSE) was fitted to 98% of vehicles inspected (where CSE was required and the level of CSE was known) and this varied little between industries. Eight percent of the inspected vehicles had more CSE fitted than was required for their vehicle type; vehicles from the recycling and waste industry were most likely to have more CSE fitted than required (20% of such vehicles).

Analysis of London's Low Emission Zone monitoring camera data (Robinson & Cuerden, 2014) estimated that:

- 10% of lorries (goods vehicles of at least 3.5 tonnes) operating in London are exempt from fitting side guards.
- 30% are not fitted with class VI mirrors and 5% are not fitted with class V mirrors.

¹² It was only possible to classify the age of vehicles where the VRM was 6 or 7 digits long and in the standard UK format. VRMs which were shorter or longer than this, or not in the standard format, were assumed to represent personalised plates or VRMs from outside the UK, and hence the age could not be identified. VRMs that were 6 digits long and fit the UK standard were assumed to be non-personalised and the age was allocated based on the first letter. This group may include some personalised plates but this is expected to be a very small proportion.

- Analysing data from the non-targeted stops shows that:
 - the most commonly inspected vehicle type is rigid vehicles operating in the transport and logistics industry (31% of inspections)
 - the differences in the distributions of vehicle types between the targeted and non-targeted surveys are likely to reflect differences between traffic and targeted vehicle types
 - cycle safety equipment was fitted to 98% of vehicles inspected (where it was required)

5.2 Inspection outcomes

53% of inspections were recorded as unsatisfactory (i.e. had at least one offence related to driver's hours, vehicle condition or other driving offences). This is considerably lower than the 74% found in the targeted data; however, it is still higher than the level of non-compliance found in (In House Analytical Consultancy, 2014) which states that:

- 25.1% of GB vehicles had a roadworthiness defect (28.8% of non-GB vehicles)
- 21.1% of trailers towed by GB vehicles had a roadworthiness defect (28.4% of trailers towed by non-GB vehicles)
- 13.4% of drivers and operators of GB vehicles were found to be committing a traffic offence (13.8%)¹³.

On first inspection the construction and haulage industries were the least compliant industries with 59% and 58% of inspections being unsatisfactory respectively. The recycling and waste industry was the most compliant known industry with 51% of inspections being unsatisfactory. However, the vehicle industry sectors do not seem well defined within the dataset, and the sample sizes do not permit a formal test of the levels of compliance by sector. If non-targeted stops of the type undertaken in this project are continued, the dataset will build over time to permit such comparisons.

5.2.1 Country of origin

Ten percent of the vehicles stopped were from countries other than Great Britain. Comparing the GB vehicles to the non-GB vehicles shows that vehicles registered within GB were less likely to have an unsatisfactory stop (52% compared with 58% of vehicles from outside of GB). These findings disagree with those found in the targeted inspections and match those in the Fleet Compliance Check reported above. This indicates that vehicles from GB are being targeted because the inspector suspects an offence whereas foreign vehicles are more likely to be inspected whether or not a possible offence has been noticed.

¹³ Data are only available for GB and non-GB separately, and for vehicles and trailers separately. Roadworthiness offences relate to mechanical compliance and traffic offences relate to drivers' hours and other process-related issues.

5.2.2 Vehicle age

Figure 27 shows the proportion of inspections which were not classified as satisfactory by age of vehicle.

Newer vehicles were found to be more compliant (had a lower proportion of unsatisfactory inspections) than older vehicles. This may suggest that older vehicles (6+ years) should be targeted for inspection.

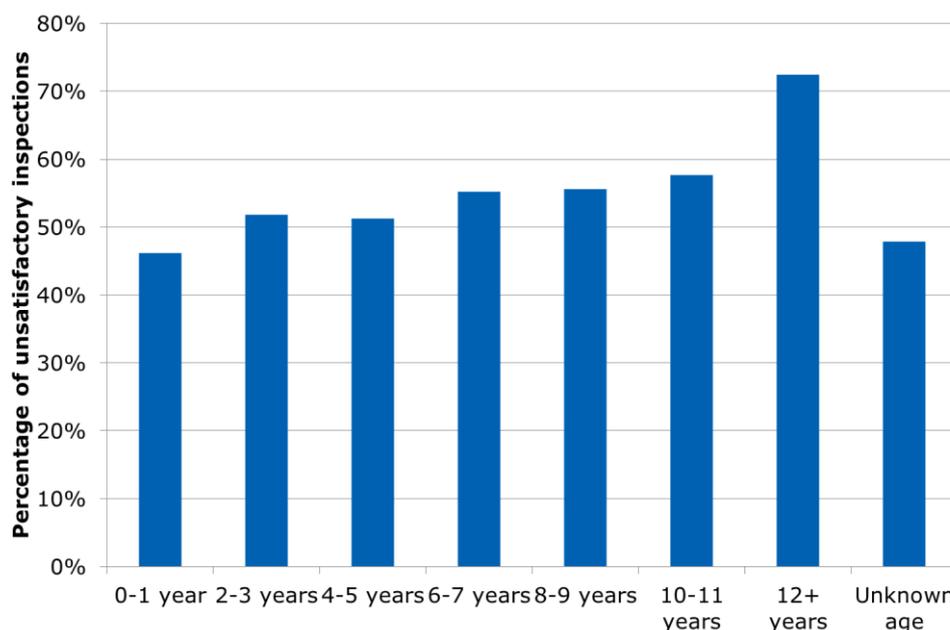


Figure 27. Percentage of unsatisfactory inspections by age of vehicle

5.2.3 Fleet Operator Recognition Scheme (FORS)

Table 11 shows whether stops were recorded as satisfactory or unsatisfactory for vehicles with and without FORS accreditation.

Table 11. Percentage of vehicles with a satisfactory stop by FORS accreditation

FORS accreditation	Satisfactory stop	
	Yes	No
Yes	50%	50%
No or unknown	46%	54%

The proportions of stops that were unsatisfactory were similar for both FORS accredited and non-FORS or unknown accreditation vehicles (50% and 46% respectively). This may suggest that in general, non-compliance is equally prevalent in both FORS accredited and non-accredited vehicles, although future non-targeted stops will be able to increase the sample size for comparison, to show whether the small difference apparent is robust.

- The non-targeted data show that:
 - overall, 53% of inspections were not recorded as satisfactory
 - older vehicles were identified as a group in which non-compliance was more common

5.3 Offences

The offences recorded relating to ADR¹⁴, overweight vehicles, Construction and Use, drivers' hours and other offences are described below.

5.3.1 International Carriage of Dangerous Goods by Road

A single inspection resulted in an ADR prohibition and none of the other inspections had any issues related to the carriage of dangerous goods.

5.3.2 Overweight

No issues relating to vehicles being overweight were recorded.

5.3.3 Construction and Use

Four percent of inspections resulted in a PG9 prohibition for construction and use (C&U) offences, 2% resulted in an insecure load offence and 7% resulted in advice or a warning being given for a C&U offence. Figure 28 shows these offences by industry sector.

Note that some vehicles may have been issued with more than one offence in a category; for example one vehicle may have had two C&U prohibitions or offences in multiple categories (for example both a C&U prohibition and an insecure load offence).

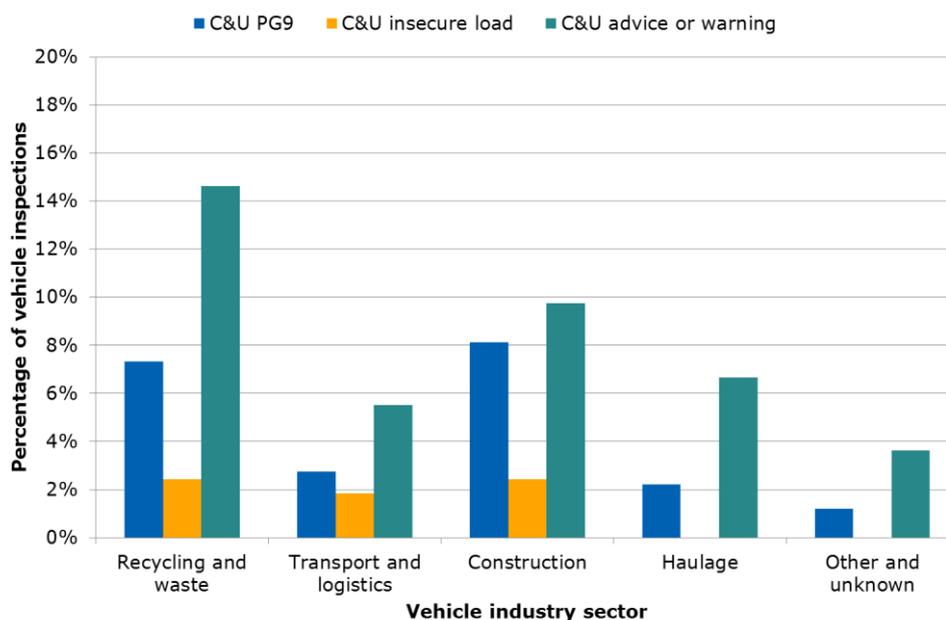


Figure 28. Percentage of vehicles with C&U offences

The recycling and waste and construction industries had the most prohibitions for C&U offences with 8% and 7% of inspections respectively resulting in a roadworthiness PG9 prohibition. This is much lower than that found in the targeted data suggesting that current targeting on the construction and waste industries appears to be effective in identifying vehicles with C&U offences.

¹⁴ 'Accord Dangereux Routier' or the "European Agreement concerning the international carriage of Dangerous goods by Road"

15% of inspections on vehicles from the recycling and waste industry and 10% of inspections on vehicles from the construction industry resulted in advice or a warning regarding C&U.

5.3.4 Drivers' hours

Figure 29 shows the proportion of drivers issued with a prohibition, summons, advice or warning and graduated fixed penalty notice (GFPN) for a drivers' hours offence.

Note that some drivers may have been issued with more than one offence in a category, for example one driver may have had two drivers' hours prohibitions, or offences in multiple categories, for example one driver may have been issued with both a drivers' hours prohibition and a GFPN.

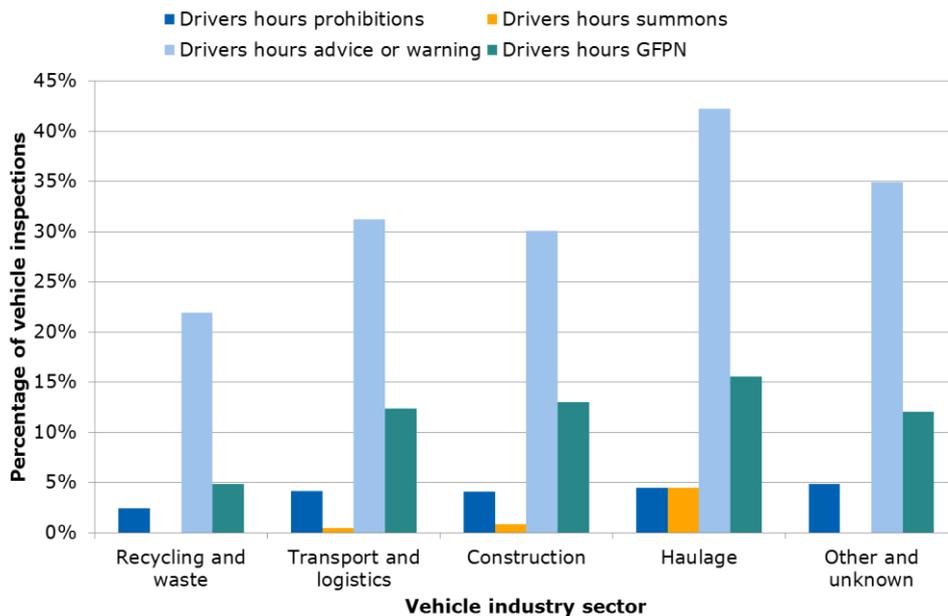


Figure 29. Percentage of drivers with drivers' hours offences

As with the targeted survey, receiving advice or a warning regarding drivers' hours was far more common across all the industry sectors than a prohibition, summons or GFPN. This was most common for the haulage industry, with advice or warning regarding drivers' hours resulting from 42% of inspections compared with 32% over all industries. The transport and logistics, construction and other and unknown industries had similar proportions of inspections resulting in advice or a warning regarding drivers hours; between 30% and 42%.

On the whole, the haulage industry also had the highest percentage of drivers' hours offences. Four percent of inspections from the haulage industry resulted in a drivers' summons (compared with 1% over all industries) and 16% resulted in a GFPN (compared with 12% over all industries). However, results were similar between the industries, particularly for GFPNs and prohibitions for industries other than recycling and waste.

These results suggest that drivers' hours offences are similarly common across all industry sectors and that no particular industry should be targeted specifically for this offence. Although, once again, it should be remembered that the non-targeted stops

were never designed to permit robust comparisons of this nature; future non-targeted stops should seek to increase the sample size available to do so.

5.3.5 Vehicle defects

One vehicle and one trailer were identified as having defective ID (e.g. VRM, serial number) and two trailers were found to have defective brakes. There was one instance of defective visibility recorded and nine cases of defective lighting (including reflectors), four of which were for vehicles from the construction industry. There were 14 cases of defective axles, wheels, tyres or suspension, nine of which were for vehicles from the construction industry. There were two cases of nuisance defects recorded (e.g. emissions, fuel spillage) and both of these related to vehicles from the construction industry.

Overall, 12% of vehicles inspected from the recycling and waste industry and 10% of vehicles from the construction industry had at least one vehicle defect recorded.

5.3.6 All other offences

The proportion of inspections which resulted in other offences, such as CPC, operator licence, mobile phone, seatbelt, driving licence and insurance offences are displayed in Figure 30. Note that a vehicle may have recorded offences in one or more categories.

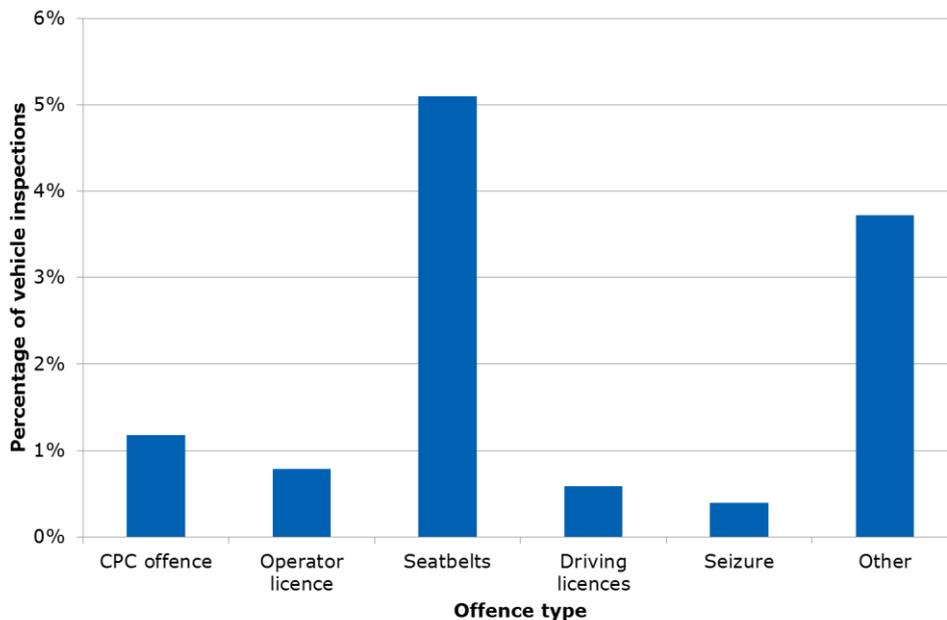


Figure 30. Percentage of vehicles with other offences

Seatbelt offences were the most common other offence, and more common than in the targeted inspections, with 5% of inspections having a seatbelt offence recorded (compared with 1% in the targeted survey). The haulage industry had the largest percentage of seatbelt offences, followed by construction with 9% and 7% of inspections in these industries identifying an offence respectively (again the limitations of the dataset with regard to drawing such conclusions should be noted).

None of the inspections identified offences relating to mobile phone use or insurance. Operator licence and driving licence offences were also less common in the non-targeted survey than in the targeted survey.

These results may suggest that:

- The haulage and construction sectors may benefit from being targeted regarding seatbelt offences
- Seatbelt offences are often not being identified through the targeting process
- The non-targeted inspection data show that:
 - very few vehicles inspected were committing offences relating to the international carriage of dangerous goods or overweight offences
 - GFPNs and advice or a warning for drivers' hours offences were the most common outcome from non-targeted inspections
 - Seatbelt offences were more common in the non-targeted inspections than the targeted inspections
 - Vehicle defects were found in 5% of inspections overall and were most common in the recycling and waste and construction industries.

6 Quantitative and qualitative exploration of HGV non-compliance in London

This section presents the findings from the combined surveys and interviews undertaken. Verbatim quotes from interviewees and open text responses provided by those who completed the survey are provided to support the findings where appropriate to do so.

The findings from the survey and interview responses are presented by topic area:

- Non-compliance in London (Section 6.2)
- Attitudes to non-compliance (Section 6.3)
- Types of non-compliance (Section 6.4)
- Motivators for non-compliance (Section 6.5)
- Consequences of non-compliance (Section 6.6)
- Safety culture (Section 6.7)
- Agency drivers (Section 6.8)
- Reporting non-compliance (Section 6.9)
- Enforcement, penalties and risk of detection (Section 6.10)
- Training and guidance (Section 6.11)
- Client perceptions of non-compliance (Section 6.12)

Summaries are presented in boxes at the end of each sub-section.

Within each section, an overview of the survey and interview responses is presented, along with any comparisons which gave rise to statistically significant¹⁵ differences in scores. Initially these comparisons were restricted to responses from managers and owners as these were the groups with sufficient sample sizes, and were of the following types:

1. Comparison of licence type, not controlling for differences in sector
i.e. all sectors standard vs. all sectors restricted
2. Comparison of licence type, controlling for differences in sector
i.e. construction standard vs. construction restricted
3. Comparison of sector, controlling for differences in licence type
i.e. construction standard vs. haulage standard

Non-significant results were generally not reported.

Finally, by combining over all sectors and licence types, responses from drivers and managers/owners (and clients where possible) were also compared.

Two statistical techniques were used to test comparisons for statistical significance:

¹⁵ The convention of the behavioural sciences is to report comparisons as statistically significant if the p-value is less than 0.05. A p-value of <0.05 indicates that there is a 95% chance that the comparison being made has arisen due to the variable under investigation, and not simply random fluctuations ('noise') in the data.

1. For standalone categorical questions, chi squared statistics are used to investigate whether distributions of responses are different from one another. For example, does the distribution of responses differ between licence types?
2. For questions which consist of a large number of items which measure different aspects of the same topic area (e.g. agreement or disagreement with a number of statements relating to HGV compliance), the responses to these questions were first combined and then analysed using a t-test¹⁶ to assess whether there was a difference in the mean responses observed in each group. For example, does the level of agreement or disagreement to a group of statements related to HGV compliance differ between licence types?¹⁷

To avoid repetition within the results, only statistically significant comparisons (at the 5% level) are presented within the text; all other comparisons were non-significant.

Throughout the interpretation of the results, due consideration should be given to the problem of multiple comparisons. This problem arises when a number of comparisons are made on a dataset; as the number of comparisons increases, it becomes more likely two groups will appear to differ on at least one attribute (i.e. that at least one comparison will be 'statistically significant') purely due to chance. For example, if 20 comparisons are run at a significance level of 5% then the probability of obtaining at least one statistically significant result purely due to chance is 64% if all tests are independent. The large number of survey questions and subsequent comparisons in this study means that the significant results obtained need to be treated with caution.

6.1 Sample and respondent demographics

In this section the final survey and interview samples are described, along with the demographics of the survey respondents.

6.1.1 Survey sample

A total of 448 respondents took part in the survey. The achieved sample is shown in Table 12.

¹⁶ Non parametric tests were used when the combined responses were not normally distributed. These tests are less powerful than the parametric t-tests.

¹⁷ In the social sciences, reliability tests are commonly carried out to determine if scales are all measuring the same underlying construct. Since the questions used in this research contained many bespoke items, prior to the analysis it was necessary to test how well the items 'hang together'. Items were tested for reliability using Cronbach's Alpha where a value greater than 0.7 for a given scale is used as the conventional 'cut off' indicating that the scale is sufficiently reliable.

Table 12. Final survey sample

	Construction				Haulage and distribution		Other				Total	
	Standard		Restricted		Standard		Standard		Restricted		n	%
	n	%	n	%	n	%	n	%	n	%		
Driver	17	3.8%	6	1.3%	37	8.3%	18	4.0%	11	2.5%	89	19.9%
Manager	41	9.2%	20	4.5%	43	9.6%	54	12.1%	22	4.9%	180	40.2%
Owner	41	9.2%	12	2.7%	37	8.3%	15	3.3%	10	2.2%	115	25.7%
Client											64	14.3%
Total¹⁸	99	22.1%	38	8.5%	117	26.1%	87	19.4%	43	9.6%	448	100%

Not all respondents completed the survey, but their responses were included if at least half of the questions had been responded to. Survey questions in the online survey were optional (respondents could proceed to the next page without completing all questions on the current page) so base numbers differ for each question.

Clients were a difficult group to reach, and so of the client responses, 59 completed the 'short client survey' which was conducted face-to-face at client premises. This survey consisted of a reduced set of key questions (see Appendix B). As only five clients completed the full survey, their responses to questions not included in the short client survey are not included in the analysis.

Surveys responses were excluded if the respondent:

- Did not successfully respond to the 'check' questions ('this is to check you are reading the questions. Please choose the 'strongly agree' response to this question')
- Appeared to have treated the survey as a 'box ticking' exercise, e.g. ticking all boxes in a straight line and providing no additional comments
- Did not drive in London at least once a month

6.1.2 Interview sample

Sixty interviews with drivers, managers, owners and clients were conducted. These were typically recruited from survey respondents. Table 13 shows the interviewees by role, sector and licence type where appropriate.

¹⁸ Note that the rows do not add to 448 as they do not include the 64 clients (who were not assigned to licence types or sectors).

Table 13. Interview sample

	Construction				Haulage and distribution		Other				Total	
	Standard		Restricted		Standard		Standard		Restricted		n	%
	n	%	n	%	n	%	n	%	n	%		
Driver	1	1.7%	1	1.7%	7	11.7%	1	1.7%	1	1.7%	11	18.3%
Manager	9	15.0%	3	5.0%	8	13.3%	7	11.7%	2	3.3%	29	48.3%
Owner	3	5.0%	1	1.7%	6	10.0%	1	1.7%	-	-	11	18.3%
Client											9	15.0%
Total¹⁹	13	21.7%	5	8.3%	21	35.0%	9	15.0%	3	5.0%	60	100%

In addition interviews were carried out with:

- Five Traffic Commissioners
- A representative from the Commercial Vehicles Unit
- A representative from DfT
- A representative from DVSA
- A representative from Backhouse Jones (solicitors)

6.1.3 Role

Survey respondents were asked to choose the option which best described their main job role, as shown in Table 14. Some respondents would have held multiple roles, particularly in smaller organisations. In these cases respondents were asked to choose the description that they felt most appropriate to them.

Table 14. Role of respondents

Role	Description	n	%
Drivers	Permanently employed by one operator	64	16.7%
	Self-employed with own HGV	2	0.5%
	Employed by an agency	11	2.9%
	Other role (i.e. drive an HGV, but not the main part of the job)	12	3.1%
Managers	Transport manager	113	29.4%
	Fleet manager	18	4.7%
	Line manager with responsibility for HGV driver(s)	22	5.7%
	Health and safety manager	8	2.1%
	Other	19	4.9%
Owners	Owner of a company which operates HGVs	35	9.1%
	Director of a company which operates HGVs	59	15.4%
	Sole trader or partner in a company which operates HGVs	19	4.9%
	Shareholder in a company which operates HGVs	1	0.3%
	Other	1	0.3%
Total		384	100

¹⁹ Note that the rows do not add to 60 as they do not include the 9 clients (who were not assigned to licence types or sectors).

Managers and owners/operators completed the same survey questions and so henceforth, managers and owners/operators will be combined into one group for any analysis by job role. See Section 2.3.5 for more discussion on this.

6.1.4 Frequency of operating in London

Any survey respondents who never operated or contracted operators in London were excluded from the sample.

The majority of respondents (90%) stated that they operate or procure the service of HGVs which operate in London at least once a week, as shown in Table 15.

Table 15. Frequency of HGV operations in London

	Drivers (n=89)	Managers/owners (n=295)	Clients (n=64)	Total (n=448)
At least once a week	79.8%	94.2%	85.9%	90.2%
At least once a month	15.7%	3.4%	7.8%	6.5%
Less than once a month	4.5%	2.4%	6.3%	3.3%

6.1.5 Location of organisation (excluding clients)

Over half of survey respondents (58%) were based outside of London. As shown in Table 16, there was a fairly even split of typical journey start points between London and the rest of the UK. As would be expected, organisations based in London were more likely to have a typical journey start point of London, and vice versa.

Table 16. Location of organisation and typical journey start point (excluding clients)

		Typical journey start point						Total (n=384)
		Driver (n=89)		Manager/ owner (n=295)		Total		
		In London	In the UK but not London	In London	In the UK but not London	In London	In the UK but not London	Total
Organisation base/head office	London	23.6%	4.5%	36.9%	3.7%	33.9%	3.9%	37.8%
	UK but not London	5.6%	62.9%	16.3%	39.0%	13.8%	44.5%	58.3%
	Outside the UK	-	-	0.7%	0.3%	0.5%	0.3%	0.8%
	Work for >1 organisation / no response	1.1%	2.2%	0.7%	2.4 %	0.8%	2.3%	3.1%
Total		30.3%	69.7%	54.6%	45.4%	49.0%	51.0%	100%

6.1.6 Years of licensure (drivers)

The drivers responding to the survey had a range of experience (Table 17), with some gaining their licence in 2014, and around half holding a licence since at least 1995.

Table 17. Driver licensure

HGV licence gained in...	Number of drivers (n=89)
2014	6
2013	3
2012	1
2010	1
2005-2009	11
2000-2004	10
1995-1999	10
1990-1994	18
1985-1989	9
1980-1984	7
Pre-1980	6
Not given	7

6.1.7 Type of HGVs on fleet

Drivers (excluding agency drivers), owners and managers were asked to indicate the type(s) of vehicles on their organisations' fleets (Table 18).

Table 18. Vehicle types on fleet

	Total (n=379)
Curtain sided lorry	29.0%
Flat lorry	26.9%
Tipper	26.4%
Box van	24.8%
Dropside lorry	16.9%
Panel van	13.5%
Special purpose	12.4%
Tanker	12.9%
Tractor	11.3%
Goods	9.5%
Skip loader	9.0%
Concrete mixer	7.1%
Luton van	7.1%
Refuse disposal	5.3%
Insulated van	5.0%

Total (n=379)	
Street cleansing	5.0%
Skeletal vehicle	4.3%
Specially fitted van	3.4%
Car transporter	2.9%
Tower wagon	1.6%
Livestock carrier	0.5%
Other ²⁰	23.2%

6.1.8 Proportion of HGVs that operate in London

60% of survey respondents stated that all of their HGVs operate within London.

6.1.9 Number of HGVs on fleet

The majority of survey respondents operated smaller fleets, with 37% having fewer than 10 HGVs, and around two thirds having fewer than 50 HGVs, as shown in

Table 19.

Table 19. Number of HGVs on fleet (excluding clients)

Total (n=384)	
1-9	36.5%
10-49	28.6%
50-249	20.6%
250+	9.9%
Missing/don't know	4.4%

6.1.10 Number of employees

There was a good distribution of organisation sizes represented in the survey, with 47% of respondents representing organisations of up to 50 employees, and 24% representing large organisations of over 250 employees, as shown in Table 20.

²⁰ Other vehicles included HIABs, low loaders and vehicle recovery trucks

Table 20. Number of employees in organisation (excluding clients)

Total (n=384)	
Fewer than 6	14.6%
6-10	7.0%
11-25	11.5%
26-50	14.1%
51-100	14.6%
101-250	9.1%
251+	24.0%
Missing/don't know	5.2%

6.1.11 Type of driver employed by organisation

The majority of survey respondents stated that their organisation employs company drivers, with 19% employing short term agency drivers, and 13% employing long term agency drivers, as shown in Table 21.

Table 21. Types of driver employed (excluding clients)

Total (n=384)	
Company driver	89.8%
Short term agency driver	18.5%
Long term agency driver	13.3%
Independent owner-driver	14.8%
Don't know	1.8%

6.1.12 Organisation membership and OCRS ratings

The Fleet Operator Recognition Scheme (FORS) is a voluntary accreditation scheme for fleet operators which aims to raise the level of quality within fleet operations, and to demonstrate which operators are achieving the standards. In November 2014, 41% of the 516,641 unique commercially registered vans and trucks that were seen in London five or more times in the year were accredited at bronze, silver or gold levels (2012).

Of the survey respondents who provided information on their FORS accreditation (n=315), 58% were FORS registered (35% bronze, 13% silver, 9% gold, as shown in [table in 6.1.10]), indicating that those with FORS accreditation were slightly over-represented in the survey responses.

Table 22. FORS accreditation, trade association membership and OCRS ratings

		All (n=318) ²¹
FORS	Bronze	35.2%
	Silver	12.9%
	Gold	9.4%
RHA membership		22.3%
FTA membership		39.6%
Other trade association membership		18.6%
OCRS (roadworthiness)	Red	2.2%
	Amber	7.5%
	Green	45.6%
OCRS (traffic enforcement)	Red	3.1%
	Amber	7.5%
	Green	44.0%
Have appeared in front of Traffic Commissioner/at a private inquiry		11.3%

6.2 Non-compliance in London

6.2.1 What is 'non-compliance'?

When asked about non-compliance in London, it became clear that there was uncertainty over what was meant by the term.

"Non-compliance. Compliance as in the legal compliance now? Or TfL compliance? What are, what are you looking at there?" (Manager, Construction, Standard)

"As in non-compliance from a legal point of view, non-compliance from a FORS point of view, non-compliance from an operator's licence point of view?" (Owner, Haulage, Standard)

"Do you mean for emissions? Or what do you mean by the compliance? Restrictions?" (Driver, Haulage, Standard)

Interviewees offered a variety of interpretations about what non-compliance meant to them. Compliance issues mentioned by drivers and managers/owners generally fell into four areas: general driving rules (e.g. speed compliance), HGV-specific rules (e.g. drivers' hours regulations), London-specific rules (e.g. London Lorry Control Scheme), and client-specific enhanced contractual requirements (e.g. Crossrail), or some combination of all of these.

"[The main non-compliance issue is] drivers that aren't really sticking to their, driving rules for whatever reason through lack of training or knowledge or ignorance of the regulations." (Manager, Other, Standard)

²¹ Lower response rate due to attrition, as this question was asked at the end of the survey

"I would imagine from a driver's perspective it is probably phone use, maybe seatbelts, probably not so much speeding." (Driver, Construction, Standard)

Clients typically only referred to the client-specific contractual requirements when they were asked about non-compliance.

"I guess it would be compliance with schemes like CLOCS and...the additional sort of livery that comes with that, and the logos and the stickers that are done through CLOCS and TfL." (Client)

- There is uncertainty about what is meant by the term 'non-compliance'

6.2.2 Non-compliance in London

HGV regulatory non-compliance in London was seen as a moderate or large problem by the majority of survey respondents (57%²²), although some felt that it was not a problem at all (6%) or a small problem (19%).

London has extra regulatory requirements over and above the rest of the UK. Some interviewees felt that being fully compliant with all of the HGV regulations in London was almost impossible, despite a strong desire to achieve compliance. When asked how London compares with the rest of the UK in terms of how easy or difficult it is to comply with regulations for HGV operations, the majority felt that it was much (49%) or a little harder (32%) than the rest of the UK.

"Sometimes I think it's almost impossible with all the rules and regulations, to actually be fully compliant all the time. I think in a lot of cases, people tend to be non-compliant in error, it's not always necessarily they go out of their way to be non-compliant, I think they just make mistakes." (Manager, Haulage, Standard)

"Because of so many restrictions everywhere you have a choice of which restriction you're going to break. You have to use common sense which is going to be the lesser penalty if you're caught." (Driver, Construction, Standard)

"Congestion charge and Low Emission Zone along with the restricted hours make it easy to fall foul of one rule or another." (Driver, Other, Standard)

"I wouldn't say all, but a vast majority want to run a compliant operation. They operate in what has to be one of the world's most highly regulated environments. And frankly, it is impossible for them to achieve 100% compliance 100% of the time, with all the regulatory regimes they operate in. Indeed, some of them could even arguably conflict." (Transport solicitor)

"Because the criteria we've got, and the criteria that many contractors have got, only relate to London, so it's a lot easier to be non-compliant in London than it is everywhere else." (Client)

It was also felt that the current regulations and requirements could be streamlined or altered to make compliance more achievable.

"There is an element of fatigue. And I think, if operators could choose, they would say, look, can we not have a bit of a sort of clearout of regulation and start with a clean sheet, and not, for example, have four or five different drivers hours

²² n=362, excluding respondents to the short client survey and missing responses

rules....London does have a habit of imposing an extra layer of regulatory burden.” (Transport solicitor)

Other London-specific issues raised by interview respondents included a lack of understanding or awareness of regulations specific to London such as the London Lorry Control Scheme, or the feeling that such schemes are now outdated or unnecessary.

“When I was a ‘Big Smoke virgin’ there were so many questions, am I Euro 4 or 5? Is the LLC the same as the congestion charge? What are Approved Routes? Am I inside the LLC times?” (Driver, Haulage, Standard)

“The London Lorry Control [Scheme] is out of date and causes unnecessary paperwork and problems.” (Owner, Other, Standard)

Only 1% felt that it was a little easier or much easier to comply in London compared with the rest of the UK, while the remaining 17% felt that it was neither easier nor harder. Survey respondents also indicated that ‘the rules and regulations associated with operating an HGV in London are too complicated’, with 20%²³ strongly agreeing and 33% agreeing with this statement. Only 3% strongly disagreed, while 18% disagreed. The responses from interviewees aligned with these views. In general, interviewees felt that the complex driving environment and congestion, in combination with stricter enforcement, make London a difficult place in which to operate HGVs.

“London is so much bigger than the big cities it can take a lot longer going in to London...there is a lot more camera presence in London as well than in other cities and they seem to be stricter on enforcing it or having more capability of enforcing the regulations.” (Driver, Construction, Standard)

“London carries with it a number of risks...foreign visitors, cyclists, people of all ages all add to the mix in London, probably more than any other city.” (Manager, Haulage, Standard)

“Perhaps one area where London is a more challenging operating environment is that you have far less accessible parking that is available for vehicles.” (Transport solicitor)

“There’s far more enforcement in London and it’s more difficult, people do commit offences but you’re less likely to get away with it in London, and that’s because of enforcement, and because of what TfL does and DVSA, and the police.” (Traffic Commissioner)

It was generally felt that one of the key features of driving in London which led to non-compliance related to the volume of traffic operating in the city, including the presence of HGVs associated with the current high level of construction.

“I think it does because London is a bit more, sort of, faster paced. There’s a lot more, sort of, deliveries perhaps that take place, there’s a lot more traffic, there are a lot more holdups, so I think operating in and around London can be a lot more difficult than other places in the UK.” (Manager, Other, Restricted)

“Because of the increased traffic levels, you know, it’s easier to get behind, and then you get into a situation where you end up not taking your breaks, because you’ve got to make time up.” (Driver, Haulage, Standard)

²³ n=326, excluding respondents to the short client survey and missing responses

"I think what's London-specific is the interaction of the sort of construction boom in the middle of the city, which is really busy and which has got really a lack of recently purpose-built roads in it, in a way that's probably even more acute than other major cities. So I think it's got a uniquely difficult sort of road network where it's constricted and there's a lot of conflicts between HGVs and other road users...there's not a massive degree of segregation." (DfT representative)

The demographic composition of road users in London was also reported to differ from other UK cities, with a potential impact on compliance.

"There's quite a lot of short term contracted drivers in London, there are a lot of agency drivers and a lot of driver movement [between jobs], and much less stability than there is elsewhere. And that definitely has an adverse impact on compliance." (Transport solicitor)

Interview respondents expressed resentment towards operating in London, which may be associated with a reduced motivation to fully comply with all rules and regulations.

"I dread sending vehicles into London. If I had my way, being a little bit of a militant, I would probably get together with all the hauliers and say, you know what, let's just not go into London, and see how long the London authorities last, if we didn't take any trucks in there...because we've basically had enough of being penalised every which way we turn." (Manager, Haulage, Standard)

- Regulatory non-compliance is considered to be quite common
- London is seen as a more difficult environment in which to achieve compliance than the rest of the UK, principally due to:
 - the driving environment
 - additional regulatory and contractual requirements

6.2.3 Areas of non-compliance

The most commonly cited non-compliance issues provided by interview respondents were:

1. Tachographs and drivers' hours (typically linked with parking restrictions)
2. Parking restrictions

"I should imagine it's probably along the lines of drivers not being able to have any breaks due to not being able to park, particularly our sector of business, it's very difficult to park in London and get the stuff off the lorry." (Driver, Haulage, Standard)

3. Vehicle roadworthiness and regular vehicle checks

"Probably not doing the vehicle checks thoroughly, so, you know, you end up with lights not working." (Driver, Haulage, Standard)

"There are very few cases involving maintenance issues where driver defect reporting is not at the top of the list as one of the major issues." (Transport solicitor)

4. The London Lorry Control Scheme restrictions

"The scheme in London where you're not allowed to drive lorries around London in the evenings, nights and parts of the weekends. Well that's basically a nightmare because you can never be sure if you're on the right road or the wrong road." (Driver, Other, Standard)

These findings support two of the key themes reported by the Traffic Commissioner for London and the South East, namely *"ignorance of how to monitor drivers' hours rules when running vehicles with digital tachographs...(and)...inadequate driver defect reporting"* (Office of the Traffic Commissioner, 2015, p.27).

Other commonly cited non-compliance issues included overloading, licensing issues, seatbelt non-use and mobile phone use while driving.

Survey respondents were asked how often they carried out a number of behaviours, and how often they saw or heard of others carrying out the behaviours. Figure 31 and Figure 32 show the responses.

It is clear that respondents were prone to a 'superiority bias', being more likely to report others carrying out behaviours than to admit to carrying them out themselves (this has also been reported in other studies, for example a survey carried out in Australia found that there is a gap in perceptions of levels of non-compliance across the industry and within respondents' own organisations, with levels of non-compliance in the industry believed to be higher – see Section 3.2.3.3). The behaviours which were most commonly reported as being committed by the respondent (at least very rarely) were:

1. Speeding (77% 'very rarely' or more often)
2. Not complying with pavement restrictions (65%)
3. Not complying with restricted road rules (55%)
4. Not wearing a seatbelt (53%)

The top four behaviours which were most commonly reported as being committed by others was similar to the above, albeit with a higher reported incidence for each:

1. Speeding (92%)
2. Using a handheld device while driving (89%)
3. Not wearing a seatbelt (88%)²⁴
4. Not complying with pavement restrictions (87%)

Two of the most common behaviours are specific to London (not complying with restricted road rules or pavement restrictions) with 16% and 25% of respondents respectively reporting that they are aware of non-compliance occurring most days or every day in London.

Taken together, these findings show that as well as non-compliance with national and London-centric HGV regulations and requirements, non-compliance with fundamental road laws is prevalent. This is supported by responses from the interviewees.

²⁴ It should be noted (see Sections 4.1.3.5 and 4.2.3.4) that observed levels of non-compliance with behaviours such as seat-belt wearing were actually very low in the targeted stop data. Nonetheless there does seem to be a perception in the industry that there is room for improvement in such areas. The non-targeted survey indicated that around 5% of drivers are non-compliant with seatbelt law and that compliance with other basic road laws is greater. .

"I would say, realistically [non-compliance with], the driving standards [is an issue], you know, disobeying the Highway Code, that's a big non-compliance issue...I'm a professional driver and I'm quite proud of my industry, but these people don't help us out. They're professional drivers, they know they've gained a professional qualification and they feel that it's okay to use their vehicle as a weapon." (Driver, Haulage, Standard)

"I see the drivers come in, I see them on the phone, I see them smoking, I see them speeding through the yard. I am out in the yard several times a day checking for non-compliance." (Manager, Haulage, Standard)

"It's the kind of social unacceptance we need to get for some of the smaller things, even seatbelts as such; the same as drink driving has certainly had of recent years. Because, you know, most people don't accept that as being the norm anymore and some of these practices in our industry do need to change but I think it's an uphill struggle." (Manager, Other, Standard)

Whilst interviewees did not tend to mention non-compliance with general road laws as a key issue, this may relate to the different interpretations of what 'non-compliance' is, with a focus on HGV-specific regulations being apparent.

Comparison of the responses from drivers and from managers/owners shows that there is a significant difference in the opinions of how often a number of behaviours are carried out in their organisation ($p < 0.001$). Managers/owners more frequently report that the following list of behaviours are carried out (at least very rarely), when compared with drivers:

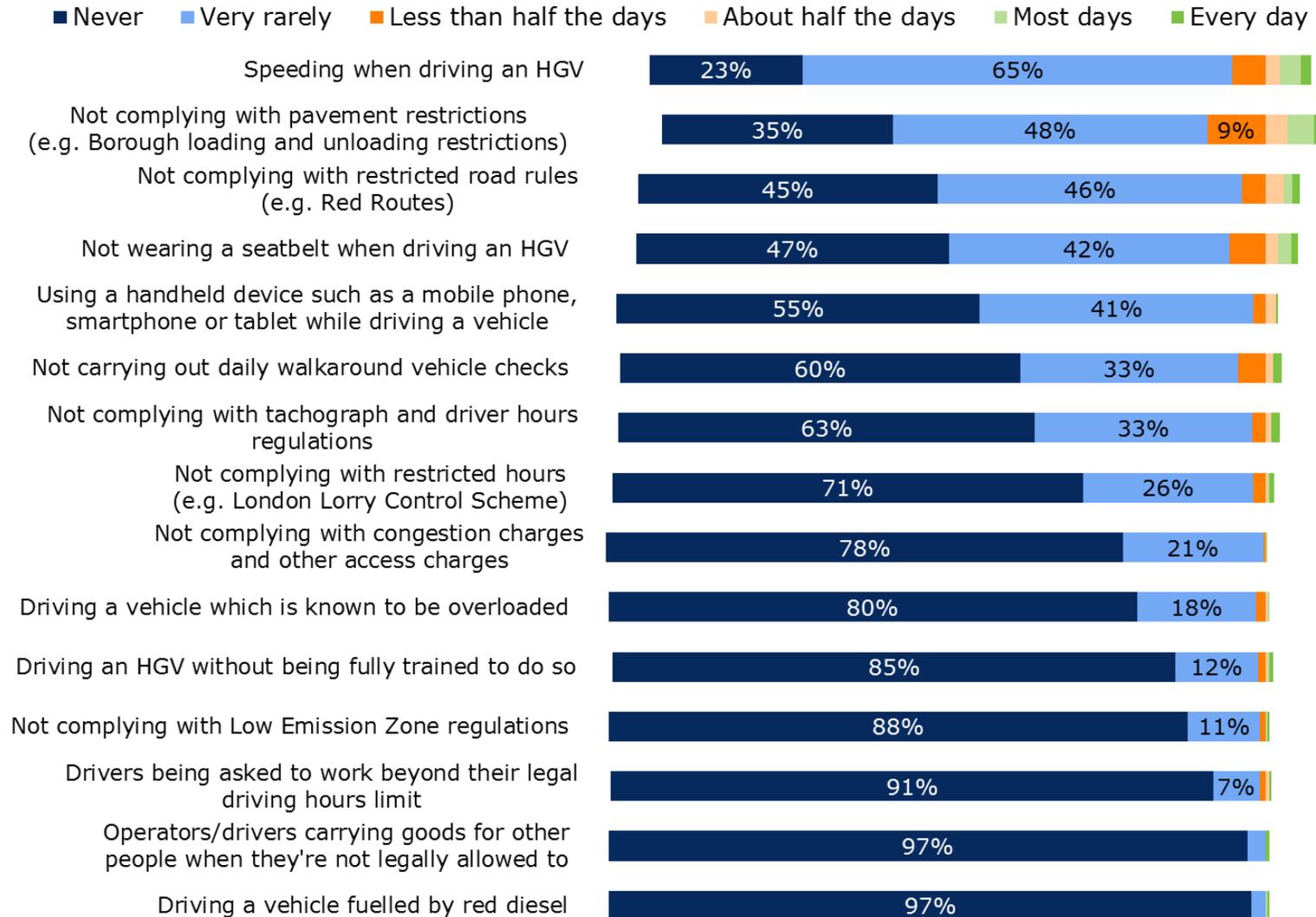
- Speeding
- Not wearing a seatbelt
- Not carrying out a daily walk around check
- Using a handheld device whilst driving
- Not complying with pavement restrictions
- Not complying with restricted road rules

A similar comparison between the opinions of managers/owners and drivers relating to how often behaviours are carried out in *other* organisations was also significant ($p < 0.001$). A similar list of behaviours (excluding not wearing a seatbelt) were more frequently reported as occurring sometimes in *other* organisations by the manager/owners compared to the drivers. Additions to this list included:

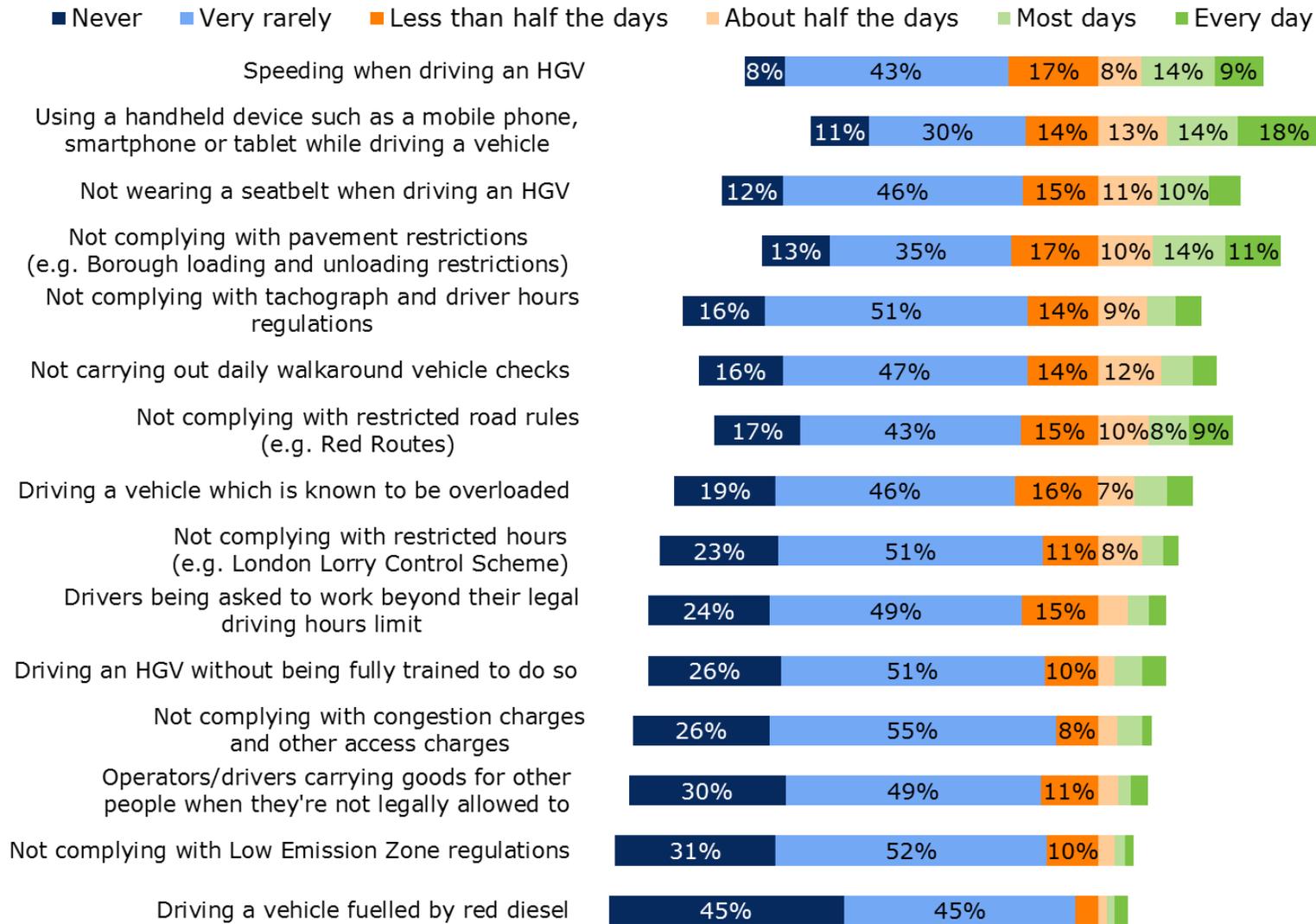
- Driving without being fully trained
- Carrying goods illegally
- Driving a vehicle fuelled with red diesel
- Not complying with restricted hours
- Drivers working beyond their legal driving hours
- Not complying with the Low Emission Zone regulations
- Driving overloaded vehicles

In terms of drivers completing CPC training, drivers responding to the survey were asked whether they know any drivers who operate an HGV without a valid CPC; of 77 drivers, five said that they did while six stated that they preferred not to say.

The non-targeted enforcement task indicated that just over 1% of drivers are committing CPC offences.



**Figure 31. "Please indicate how often you do each of these behaviours yourself" (Drivers)
 "Please indicate how often you believe each behaviour happens in your organisation" (Managers/owners)
 (n ranged from 328 to 338)**



**Figure 32. "Please indicate how often you see/hear of others doing each of these" (Drivers)
 "Please indicate how often you see or hear of other organisations doing each behaviour" (Managers/owners)
 (n ranged from 312 to 331)**

- Non-compliance with HGV regulations was reported, in particular drivers' hours, parking/road restrictions and vehicle roadworthiness
- Non-trivial levels of non-compliance with general driving rules were also reported, in particular speeding, seatbelt wearing and mobile phone use
- Survey respondents reported that they see or hear of non-compliance by others more frequently than they carry out non-compliance themselves
- Managers/owners more frequently reported that non-compliant behaviours were carried out in their organisation than did drivers

6.2.4 Interviewee perceptions of non-compliant operator licence types, sectors, roles and vehicles

Interviewees were asked for their opinions about which operator licence types, sectors, roles (i.e. drivers, managers, owners, clients) and vehicles were least likely to comply with HGV regulations.

6.2.4.1 Operator licence types

As described in Section 2.3.5, statistical analysis of the survey responses to compare responses from those belonging to organisations with restricted and standard operator licences was undertaken (where possible) but very few statistically significant differences were found. It should be borne in mind that the survey respondents were self-selected, and so this lack of significant differences between these two groups may or may not be representative of the wider picture in London. See Section 9 for further discussion.

Interviewees did identify restricted operator licence holders as being more likely to be non-compliant²⁵, specifically smaller organisations (irrespective of sector). Interviewees suggested that because of the nature of restricted licences (i.e. operating an HGV being an ancillary part of their business), compliance was not as high on the agenda of holders of such licences as it would be for operators holding a standard licence.

"The bigger guys tend to know what they're doing – but the small, largely restricted operators, by that I mean people carrying their own goods, particularly scaffolders have no idea really what's involved in operating a heavy goods vehicle. They have no idea really how to maintain an 18 tonne lorry or how to ensure it is in compliance with the law." (Traffic Commissioner)

²⁵ Evidence was also found from external sources, for example the Traffic Commissioner's Annual Report (2014) included the following statement: "This year I have seen a large number of restricted operators who have had such vehicles [with digital tachos] for months or years but who have no idea that they need an operator's card to download from the vehicle unit or how often they should do the downloads", and evidence online included an article exploring 'why construction businesses find it so difficult to comply', stating that "Restricted Operator's Licence holders are not required to employ the holder of a Certificate of Professional Competence (CPC), or nominate a CPC holder as the transport manager on their Operator's Licence. There is therefore often a lack of awareness and/or understanding of what is actually required of them in order to achieve compliance...restricted operator's licence holders frequently fall foul of these minimum standards." (JMW Solicitors, 2015)

"On those restricted licence operators, there's a big gap between their awareness of what they have to and the reality of what they have to do to comply." (Transport solicitor)

"Just because you've got a restricted license doesn't necessarily mean you would be non-compliant, but it'd probably give you more of a chance to be non-compliant." (Manager, Other, Restricted)

"They're not transport-minded. If you're not actually...if you've never had to learn the laws, you're not going to know the laws, are you?" (Manager, Other, Standard)

In particular it was thought by some respondents that restricted operator licence holders are less likely to be compliant as transport is not likely to be their main business and is not necessarily treated as a priority.

"Often, you know, business managers focus on other aspects of their business and running trucks is, you know, not what they are interested in, it's not what they do and compliance takes a back seat for them." (Driver, Construction, Standard)

"I did work for a couple of restricted licence holders and, yes, disastrous really, to them it's a van, it's not a lorry it's a van it's just something which carries lots of goods into, you know, to their shops or businesses." (Manager, Other, Standard)

The lack of a requirement for formal transport management training in the form of a CPC was also deemed to contribute to the lack of awareness and knowledge which can lead to non-compliance.

"[It's] surprising how many people just don't understand their legal obligations when it comes to transport. I think an awful lot of restricted operators think that it is literally just a case of that you need to know some basics about drivers' hours and actually the driver should know that. And, you know, usually you can get perhaps a consultant in who will help you set everything up and then you're left to your own devices. But I would say you'll probably find a high proportion of people that are doing things wrong, it's through lack of education and lack of knowledge on restricted licences. And it purely comes down to the fact that they are ignorant of what they need to do." (CVU representative)

This potential gap in legislation is one which was felt to lack logic.

"They're not required to have, for example, a qualified transport manager. And that's a big hole which nobody understands in the industry. Nobody understands why that's the case. It's illogical and irrational and always has been, because they have exactly the same risks as everybody else, and yet somehow they're not...it's just a legal quirk that they've never been required to have a qualified transport manager." (Transport solicitor)

The payment practices used by restricted licence holders, particularly in the waste and skip industries, was also felt to have an effect on compliance.

"Look very closely at the waste and skip industries and those on restricted licences. They pay per load still, encouraging the drivers to race around to get the extra load in. The vehicles tend to be less well maintained than reputable road hauliers." (Manager, Haulage, Standard)

One survey respondent held the view that while the construction industry may be seen as being at the crux of the issue of HGV safety in London, the haulage industry also currently lacks buy-in to compliance issues and initiatives:

"The transport industry is being led along this path by the construction industry, and the result of that is a certain apathy with haulage companies – 'we do it because we have to' or 'we do it because we wouldn't get the work if we didn't'. The only way to get the transport industry to buy into it is to involve them directly. I understand and appreciate that the construction industry are statistically the problem area, but they run lorries because they need to get their products moved – they don't run lorries as a business where the profit centre IS the lorry. That's the domain of the transport industry, but transport operators have never been asked for their input, which in my view is wrong." (Owner, Haulage, Standard)

Most respondents thought that restricted operator licence holders not being required to hold a CPC had a negative impact on compliance levels.

"100%, they don't have any concept of compliance because they don't have the... they've never done the course to know what the regulations are. I think having their own 'O' licence is outrageous without having a CPC holder." (Owner, Haulage, Standard)

"You've got the vehicle being operated by someone who is not professionally trained and as a consequence of that they can be ignorant to the fact that they need it [training] at all." (Manager, Other, Standard)

A perceived lack of checks on restricted licence holders was also deemed to contribute to non-compliance.

"You get an operator, restricted licence holder is issued with his operator's licence and you know, is expected to read all the drivel, you know, that's sent out, which no one ever reads the small print, and then lo and behold, no one comes out to see them, and two years' time they get a visit from someone, who's they've just happened to crop up on their maintenance investigation list, and they're not doing anything, they've got no defect reporting, they've got no forward planning, there's no six weekly inspections being carried out, etc." (Manager, Haulage, Standard)

Many respondents felt that without a CPC, an operator would not have the knowledge about how to be compliant and should therefore be required to undertake more training than they currently are required to.

"We've had some restricted licence holders attend driver CPC courses and they're completely oblivious to the rules and regulations in a lot of instances." (Owner, Haulage, Standard)

"A restricted licence doesn't require a CPC holder. Now, for these people, they still play by the same rules, but they haven't been given the knowledge to actually understand those rules. It scares me a little bit." (Manager, Construction, Restricted)

However, the views discussed above were not shared by all respondents. Some interviewees felt that restricted operator licence holders not having a CPC has little or no impact on operators' knowledge and levels of compliance.

"I know a couple of firms that run on restricted licences personally and I reckon that actually the guys running them probably know as much if not more than I do. I mean, they're professionals, just because it's restricted their licence makes them no less professional than the guy that's holding a full international licence." (Manager, Construction, Standard)

"Yes. To be fair, I ran this operation for about five years without having a CPC. And I was still compliant." (Manager, Other, Restricted)

6.2.4.2 Sectors

The sectors most commonly mentioned in relation to non-compliance were construction and waste. However, respondents also acknowledged that improvements had been made in these sectors as a result of schemes such as CLOCS.

"It's more in my own industry, the waste industry, that is not such a compliant industry. However, an awful lot of them have pulled their socks up." (Manager, Construction, Standard)

"Construction operators don't always, sort of, maintain vehicles to a reasonable standard. I think it's probably more difficult for those vehicles associated with construction, because, they're based in different working environments at construction sites, and they take a lot more hammering. There's a lot more wear and tear perhaps than some of the normal vehicles, so I think, that makes it difficult for them." (Manager, Other, Restricted)

"Having attended several TfL and CLOCS presentations, I think the construction sector [is likely to have low compliance levels]. But obviously I'm aware that there's significant action being taken to resolve it." (Owner, Haulage, Standard)

Those involved in enforcement and regulation agreed that these sectors present to traffic commissioners or are subject to penalties more than other sectors. Reasons for non-compliance in these sectors included pressure to meet specified delivery slots, and high numbers of construction vehicles operating in London.

"Construction and waste are definitely in the limelight. They're under a lot of pressure for time deliveries or collections, which can put extra additional pressure on the drivers even if they've tried to sort of rush to the work to comply. Working in and around London, that one little accident causes a massive sort of tailback and then that obviously adds to their time." (CVU representative)

6.2.4.3 Roles

Most interviewees felt that drivers were most likely to not comply with regulations, but emphasised that their managers had a role to play in encouraging drivers to drive in a compliant manner.

"I think it's the drivers that are ultimately responsible but, I think the way that their companies are structured, they want to make a profit and they make a profit by delivering more loads, so drivers earn money on how many loads they can deliver in a day." (Owner, Haulage, Restricted)

"I don't think drivers don't comply out of their own interests, I think they don't comply because of pressure from their business owners." (Owner, Haulage, Standard)

"Some drivers are actually forced into things at a sort of threat of losing their job because if you've got sort of less scrupulous management who are there purely making the money, then they'll pay lower wages to try and keep the profit margin better." (CVU representative)

Some of the enforcement and regulatory interviewees suggested that non-compliance was driven by individuals who believed that it would save them money.

"I would say it's the ones who are interested in the bottom line. They think they can cut costs and think that's saving them money. So, yes, they're driven by finances and quick returns without thinking about the longer term and about, you know, the reliability of their fleet and the fact they rely on their licence and their vehicles for their business." (Traffic Commissioner)

Some managers expressed the view that they experience frustration at their lack of control over non-compliance carried out by drivers.

"That's the end of my business because a driver has decided to flout the rules and use the phone [on a client's site]. I think sometimes we are held a little bit too responsible for the actions of our drivers. I can't be there with them in the cab all the time." (Manager, Haulage, Standard)

6.2.4.4 Vehicles

Tipplers, skip lorries and scaffolding trucks were considered to be the vehicles least likely to be compliant with HGV regulatory requirements, particularly if they are operated under a restricted licence.

"Construction, scaffolding and anybody who's got a restricted operator's licence – they may be unknowingly non-compliant or unconsciously non-compliant because they just don't know. Scaffolders, they're very, very good at knowing how to put up scaffolding and all those other things, and the lorry is just their tool for getting the scaffolding to the site. They don't see themselves as being involved in the transport industry so they don't pay as much attention to it. There's a lot of skip and waste lorries and they're a significantly non-compliant sector." (DVSA representative)

"Tipplers are dangerous vehicles for a number of reasons...They're higher. They often don't have the same side guard protection because it's impractical, because they're going on and off sites...and they can tend to drive faster. The driver's head is on achieving that turnaround...if they're working on some projects, they may be exempt tachograph rules all together." (Transport solicitor)

"There are some industries that are more prone to problems and typically they will be scaffolding and skip hire. Scaffolding and skip hire are our two areas that actually, if you can cut them out of the, if I took them out my hearings, I would reduce the numbers." (Traffic Commissioner)

"As you're queuing to get into a [construction] site the skip lorry next to you isn't compliant with the rules, and isn't expected to [be]...that's the kind of stuff that can lead to, ' well, I don't know why I bother, because other parts of the industry don't have to'." (Manager, Construction, Standard)

"The scaffolders, I find that they probably do have a high regard for health and safety in the way they erect their scaffolding and the practice they observe when

they're walking around on top of it. Because clearly the consequences of getting it wrong are catastrophic...but that health and safety culture goes out the window when they get in their lorry. They don't see driving their lorries as the same, as an extension of their health and safety responsibility." (Traffic Commissioner)

Their higher (perceived or actual) involvement in non-compliance is perceived as being related to the nature of the work that these vehicles, especially tippers, are involved in.

"If people are working on construction sites and projects like the Crossrail project, and have got tipper-type vehicles going on and off site, then there's an increased risk of damage to tyres, through that type of work. This increases the regulatory burden on the operator and driver to make more regular vehicle checks." (Transport solicitor)

Several interviewees suggested that the nature of the operations that these vehicles are involved in might lead to people making assumptions about them being non-compliant (even if they are fully compliant).

"I mean, just looking at vehicles when I go into London, probably tippers look the worst. I think part of that is because of the work they do, they're in and out of sites, they're dirty looking trucks. So sometimes they might be fully compliant, but they just give the impression that they're not compliant." (Manager, Construction, Standard)

"Skip lorries, tipper lorries, waste management lorries, in other words bulk scrappers, bulk tippers that are carrying scrap metal and waste. They have a hard life those trucks, so I personally believe they should be checked more often than somebody just tramping up and down the motorway." (Client)

- HGVs operating under restricted licences are seen as less likely to achieve compliance
- Non-compliance is expected to be most prevalent in the construction and waste sectors
- Drivers (in some cases influenced by senior management instruction or processes) were seen as the individuals most likely not to comply
- The most non-compliant vehicles operating in London are perceived as being construction vehicles, specifically tippers and scaffolding trucks

6.3 Attitudes to non-compliance

The findings relating to current attitudes to non-compliance amongst drivers, managers and owners operating in London are described below in terms of how acceptable and how important compliance is perceived as being.

6.3.1 The acceptability of non-compliance

Interviewees were asked two questions related to the acceptability of non-compliance: one about the attitude of the industry as a whole towards non-compliance, and another about their own personal attitude to it. Unanimously, it was deemed to be 'unacceptable', and this was supported by the survey, wherein respondents were asked about the level of acceptance of non-compliance with HGV regulations. A small proportion of respondents said that non-compliance was always ok (5%), or

mostly/occasionally OK, depending on the circumstances (11%), but 79% said that it was never OK. However attitudes between roles varied significantly ($p < 0.001$), with clients being most likely to say that non-compliance was mostly or always OK, as shown in Figure 33. This is discussed in more detail in Section 6.5.

In addition, there was a significant difference between responses for standard and restricted licence managers/owners ($p = 0.022$); standard licence holders were more likely to say that non-compliance is at least occasionally okay. However, caution should be taken interpreting these results due to small sample sizes ($n = 63$ restricted).

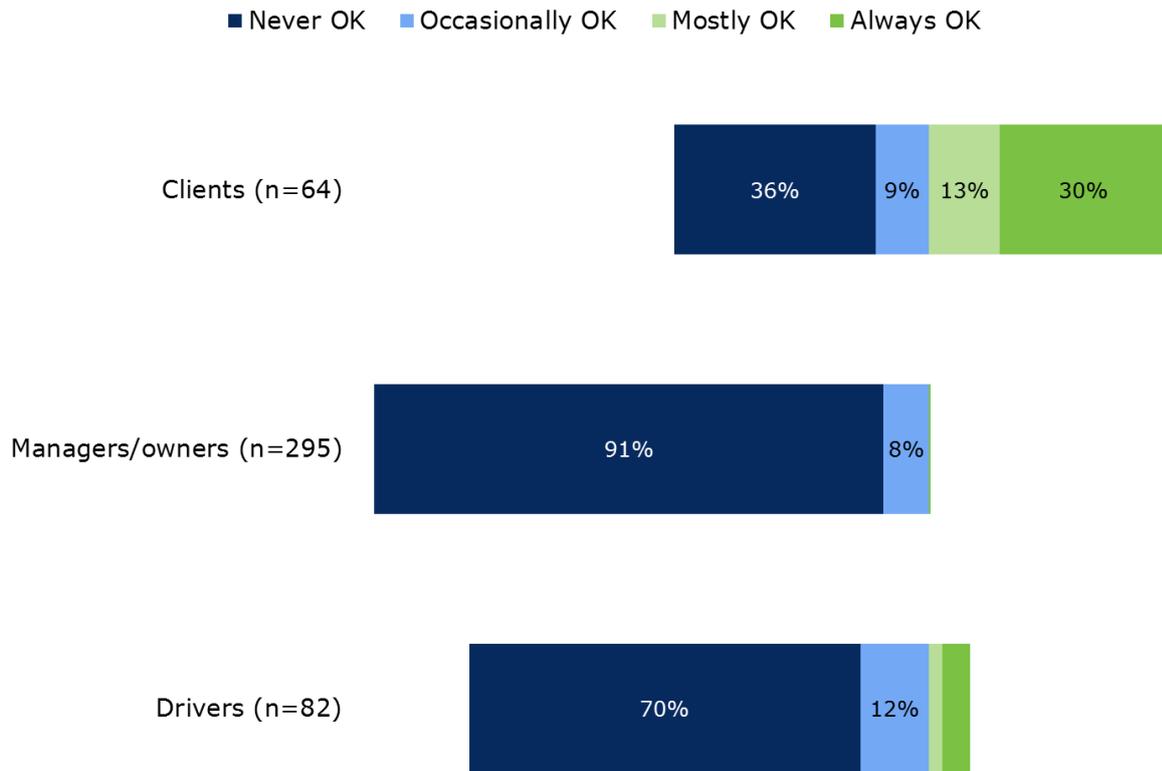


Figure 33. “Which of the following statements comes closest to your own views about non-compliance with HGV regulations: non-compliance is always OK; mostly ok depending on the circumstances; occasionally ok depending on the circumstances; never ok” (excludes 'don't know' and 'none of the above' responses)

Interview data from one of the Traffic Commissioners suggested that most operators strive to be 100% compliant and that many achieve this.

“In general it's everyone's trying their best to comply all of the time, but it's sometimes not possible. Sometimes situations get in the way and then there's just this tiny minority that are doing it deliberately and they're the, sort of, really ones that we need to target the most.” (Traffic Commissioner)

- Non-compliance is seen as unacceptable by the vast majority of operators
- Clients are less likely to see non-compliance as unacceptable

6.3.2 *The perceived importance of compliance*

Managers and owners were asked how important they think it is for HGV operations to comply with legal requirements in general. The vast majority of the 287 respondents stated that it was 'very important' (92%) or 'quite important' (7%), and this was supported by interviewees.

"Non-compliance is certainly not accepted in any shape or form, because it is such a dangerous sector. It can cause a loss of life and when it does happen, it's catastrophic and if we do not comply it can be quite costly you know, parking tickets, speeding tickets traffic, various types. I mean if we are not complying with road regulations it will be virtually impossible [to operate safely] so yes non-conformance and non-compliance is certainly not really accepted by most professional companies within the industry." (Manager, Haulage, Standard)

Managers, owners and drivers were asked how important various aspects of compliance are to them and to their organisation (see Figure 34). For all areas of compliance, ratings of 'importance to you' and 'importance to your organisation' were strongly correlated. For almost all areas, around 90-95% of respondents gave the 'very important' rating. The exception was 'deliveries' to which only around half of respondents gave the 'very important' rating.

Respondents were also asked about the importance of compliance to other organisations in London. For all areas of compliance ratings of importance were lower than for 'importance to you' and 'importance to your organisation', with delivery compliance again attracting the lowest ratings.

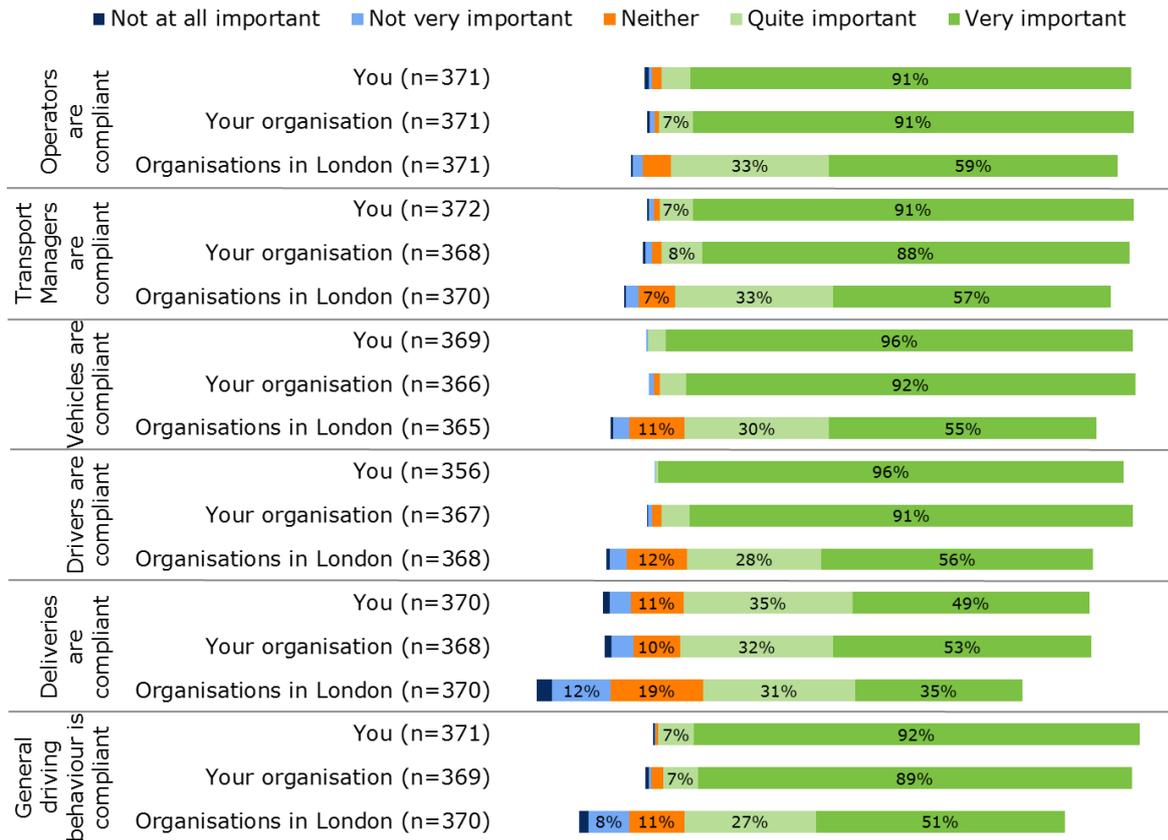


Figure 34. “(In your opinion), how important do you/your organisation/organisations which operate HGVs in London think it is to make sure...”

Delivery compliance was considered to be less important, with just over one third of respondents saying delivery compliance was ‘very important’ to organisations in London, 49% stating that it was ‘very important’ to them, and 53% stating it was ‘very important’ to their organisation.

Clients were also asked how important these aspects of compliance were to them. While drivers and managers/owners generally agreed about the importance of various aspects of compliance to them (hence combining their responses in Figure 34), clients held slightly different views, as shown in Figure 35. They were significantly less likely than drivers ($p=0.038$), and managers/owners ($p=0.043$) to think that each aspect of compliance was ‘very important’, and more likely to say that each aspect was ‘neither important nor unimportant’. Like drivers, managers and owners, clients also saw delivery compliance as the least important aspect, with 31% stating it was ‘not at all important’ or ‘not very important’.

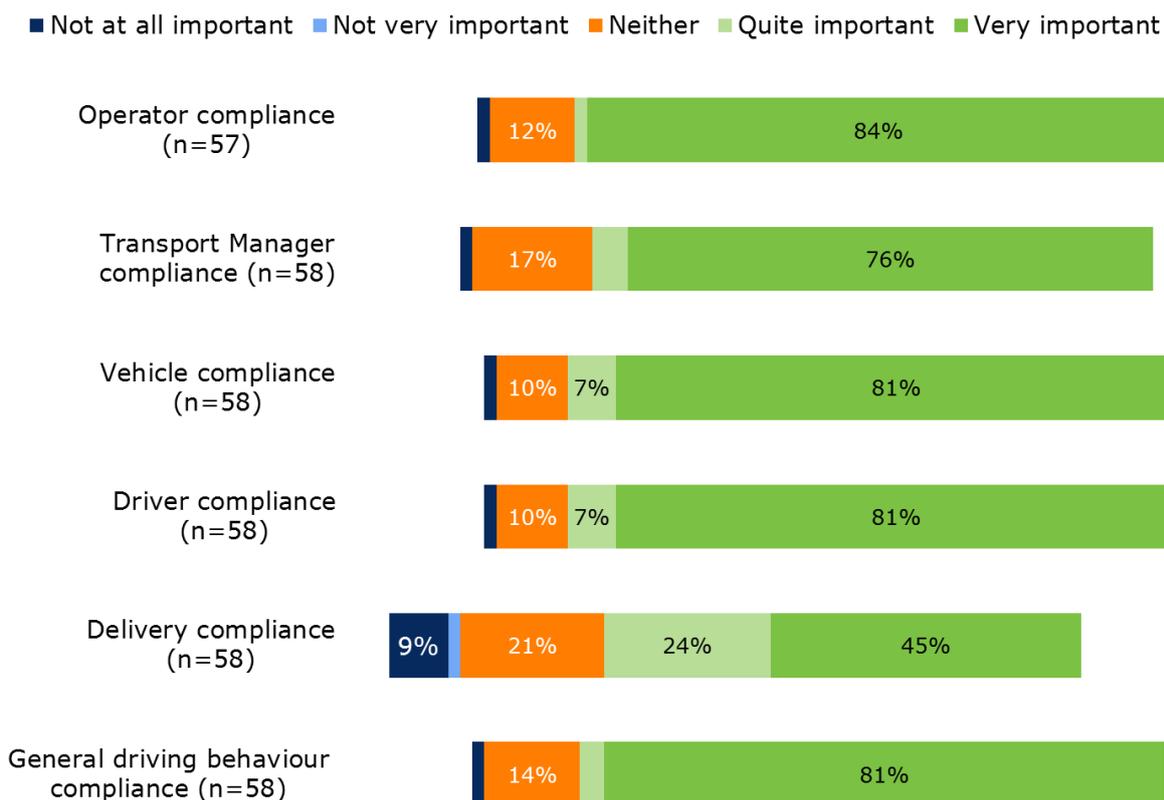


Figure 35. "How important do you think it is to make sure..." (clients only)

- Achieving compliance with legal requirements is reported to be very important to nearly all drivers, managers and owners
- Compliance is quite important or very important to clients
- Compliance when delivering goods (i.e. parking, loading and unloading) is less important than other aspects of compliance to all stakeholders

6.4 Types of non-compliance

The typology outlined in Section 3.2.4.1 can be used to describe the four types of non-compliance found amongst the interviewees.

6.4.1 Unintentional non-compliance

Unintentional violators are genuinely unaware of how to be compliant, or misunderstand the rules.

"There's people who take an operator licence out in the first place and think it's a TV licence or a fishing rod licence – you just pay your money and get your licence, job done. And don't understand anything that goes with the running of a commercial vehicle, all the structures and systems you need in place." (Traffic Commissioner)

"There's probably not as much understanding of individual rules or individual regulations, but I'm sure people understand the general purpose of compliance." (Traffic Commissioner)

Interviewees also considered the complexity of some legislation a main reason why some individuals and operations are not fully aware of how to be compliant.

"I think that legislation is complex, it changes all the time and different bits of legislation that apply to different industries at different times according to what you're doing, I think the answer would probably be, if I was going to give it an answer out of ten, with ten for being full knowledge and 1 being no knowledge, I would probably say we are around a 6-7 mark." (Manager, Haulage, Restricted)

The perceived high frequency of changes to regulations and requirements was also mentioned as a potential reason why not everyone is aware of how to be fully compliant, particularly older workers not keeping as up to date with legislation changes were also cited by respondents.

"I would say probably 90% of any infringements that I incur are working time related, because if the drivers have been for the last twenty five years, concentrating on their four and a half hour driving rules and their 45 minute breaks and everything else, and then all of a sudden, 2005, we bring in another piece of legislation in to say, oh, we're not allowed to work more than six hours without a fifteen minute break, all day, and then you've got to have another fifteen minutes before you get to nine hours, and if you get to nine hours, you've got to have another fifteen minutes..." (Manager, Construction, Standard)

"It [non-compliance] is more frequent than I care to know - you find people using out of date preventative maintenance inspection forms that haven't kept up to date with the inspection manual. Things like the guide to maintaining roadworthiness was improved in April last year and a lot of work was done with DVSA and it was written to make it more accessible for people and they hadn't realised." (Traffic Commissioner)

Drivers and managers/owners were asked how good they felt their knowledge was of the rules and regulations associated with ensuring HGV roadworthiness and driving HGVs in London (Figure 36), and all respondents were asked about their knowledge of operating HGVs in London (Figure 37). Overall, self-reported knowledge was good, although differences were apparent between roles. For example, as shown in Figure 36, managers/owners reported significantly better knowledge than drivers in relation to both ensuring HGV roadworthiness ($p=0.014$), and driving HGVs in London ($p=0.03$). If drivers feel less aware of the rules and regulations relating to their work, they may be more likely to commit unintentional non-compliance.

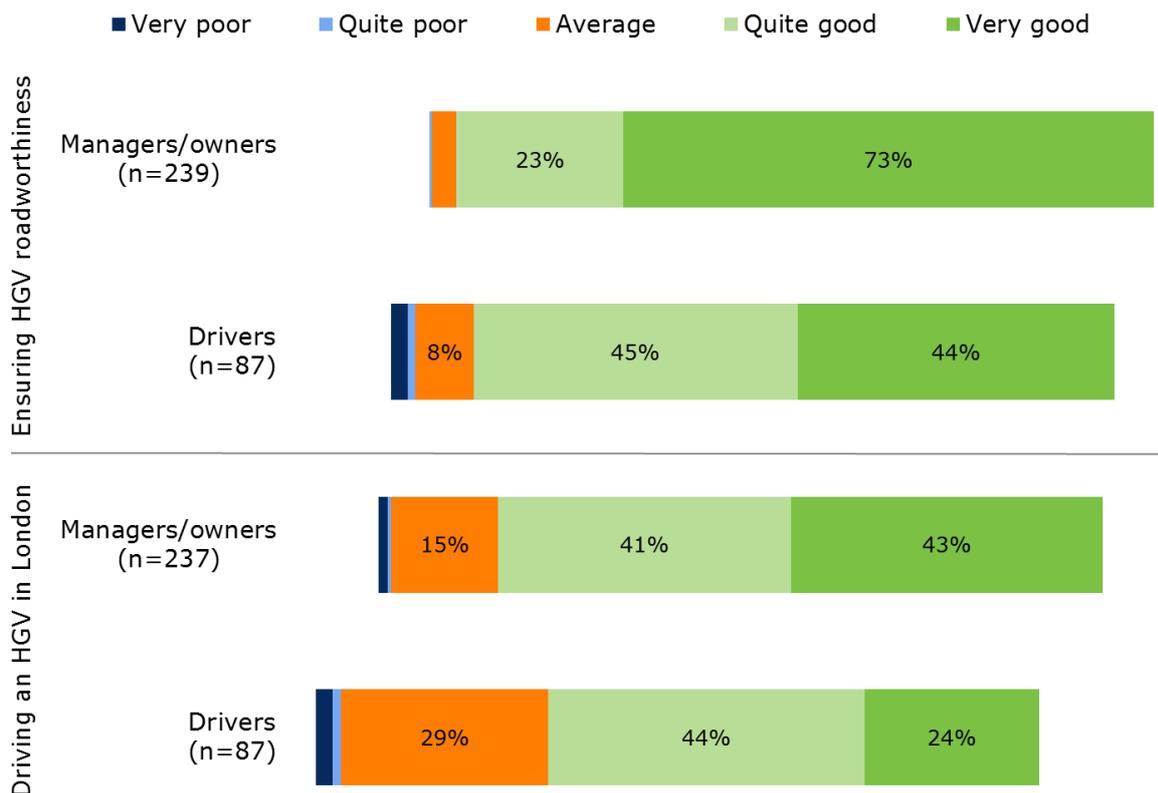


Figure 36. “How good do you think your knowledge is of the rules and regulations associated with the HGV industry, relating to roadworthiness of HGVs and driving HGVs in London?”

There was a significant difference in the knowledge of rules and regulations associated with operating HGVs in London between the job roles ($p < 0.001$, see Figure 37). The clients responding to the survey clearly have a poor knowledge of the rules and regulations associated with operating HGVs in London, with less than 10% reporting quite good or very good levels of knowledge. Managers/owners had better self-reported knowledge than drivers, with over 50% of drivers reporting at best ‘average’ knowledge, compared to 19% of managers/owners.

In terms of more serious non-compliance, that might result in appearing in front of the Traffic Commissioner, there was a strong sentiment from the Commissioners that the proportion of organisations and operators that intentionally do not comply is very small, suggesting that unintentional non-compliance is responsible for the majority of non-compliance.

“I think you get a small percentage who are not good, either because they’re incompetent or they’re complacent and then they, you know, they’re the ones that are easy to look after and bring them back into the fold, and that’s a small percentage. And then you’ve got an even smaller percentage of those that don’t give a stuff and are, you know, just rogues, and that’s a tiny percentage.” (Traffic Commissioner)

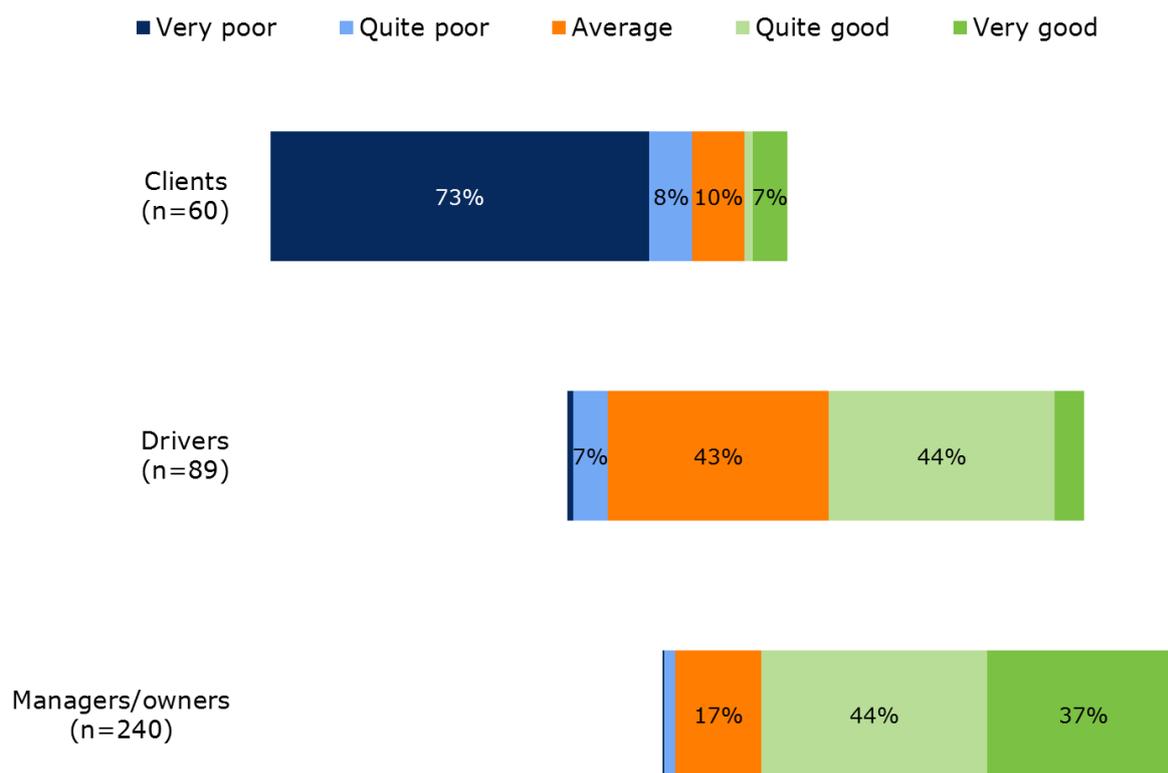


Figure 37. “How good do you think your knowledge is of the rules and regulations associated with the HGV industry, relating to operating HGVs in London?”

See Section 6.5.1 for more detailed information on unintentional non-compliance.

- Unintentional violation results from poor knowledge of rules
- Lack of knowledge may be more of an issue among drivers than managers/owners
- Managers/owners reported better knowledge than drivers in relation to both ensuring HGV roadworthiness, and driving HGVs in London

6.4.2 Routine non-compliance

Those who commit routine non-compliance regularly and habitually choose to ignore certain rules and regulations because they ‘do not apply’ to them or they are too much of a drain on valuable time (as supported by Jones’ (2013) findings).

“There are those out there who know what they should be doing and have this lapse attitude, well, I can get away with that and I can get away with this, and just cheat a little bit.” (Manager, Construction, Restricted)

[What do you think might motivate organisations to not comply?] “Time, I would suggest. An excuse would be, I haven’t got the time to do it.” (Manager, Construction, Restricted)

“There will be certain operators who regularly break rules and whatever else, or just completely ignore them.” (Manager, Construction, Standard)

The survey revealed that rules and procedures are not always deemed necessary in order to 'get the job done' safely. Respondents were asked to indicate their agreement or disagreement with the statement 'in general, some rules and procedures do not need to be followed to get the job done safely'. Whilst 24%²⁶ and 34% disagreed or strongly disagreed with this statement (respectively), 15% agreed and 7% strongly agreed. Again there appears to be a split in attitudes to routinely violating some rules and procedures between drivers and managers/owners ($p=0.02$), as shown in Figure 38. Managers/owners were more likely to hold a positive attitude towards this issue, with drivers holding a less positive attitude; around one third agreed with the statement.

■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

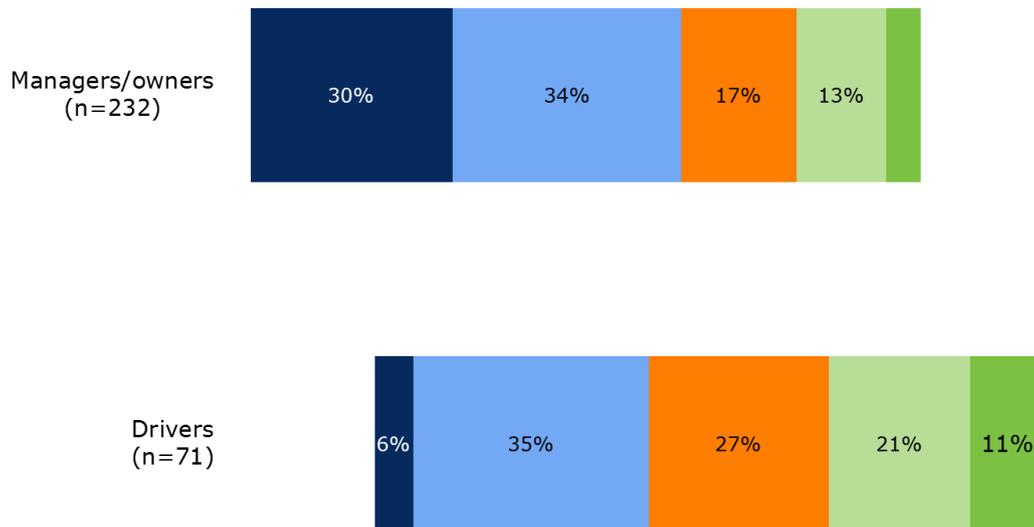


Figure 38. "In general, some rules and procedures do not need to be followed to get the job done safely"

This finding was further supported by the interviews, for example one survey respondent (a manager who was the organisation's transport manager CPC holder) described non-compliance with regulations which was felt to have no detrimental effect on safety:

"If a vehicle is 100 kg overweight through no fault of the driver or operator then so what. If the driver accidentally takes a wrong turn and happens to do 1/4 mile on a restricted route then so what? If a driver inadvertently runs over his hours because he has been held up beforehand then so what? None of these examples hurt anyone or cause any real issues." (Manager, Haulage, Standard)

'Temporary' non-compliance was also felt to be justifiable by some respondents, for example when carrying a split load:

"Sometimes we do split loads where half is tipped on one site and half at another, this means the second drop will sometimes mean vehicle axels being slightly overloaded at rear although it will only be for short distance." (Owner, Construction, Standard)

²⁶ n=303, excluding clients and missing responses

- Routine non-compliance results from the habitual disregard of rules which are felt not to be relevant
- Drivers in particular may feel that there are no safety risks involved in ignoring some rules and procedures

6.4.3 *Situational non-compliance*

One of the themes emerging from the interview data was that HGV operators, in particular drivers, described feeling 'forced' into non-compliance by the immediate situation or by organisational pressures. One of the most commonly highlighted examples related to parking and tachograph rules. Drivers suggested that they found themselves in situations where they were approaching or over their drivers' hours limit, and had to decide whether to park illegally or exceed their driving time.

"While good operators aim to achieve [full compliance] genuine mistakes are made by staff. This sometimes results in non-compliance. For instance not finding a suitable and safe location to park up might take a driver beyond his legal driving time. The EU regulations are complicated alone. On top of this, the situation is made more complicated by the working time directive legislation and any other special rules that might apply locally. A driver requires a clear set of rules that he can follow." (Manager, Haulage, Standard)

"I'm sure that every day guys are inadvertently transgressing on the parking. Sometimes the drivers get to a point where they say well, we've got no choice. We run a delivery service and our London depots ring us up and say 'look, there's no way we can get to the back of this or delivery's going to have to be made this way, will your company pay for the parking ticket if we get one?' So in effect that is a deliberate non-compliance, because they know that they're going to get a parking ticket if they get caught, but they don't have a choice." (Owner, Haulage, Standard)

Other examples of situations which led to situational violations included reversing up one-way streets and making illegal turns at junctions. Interviewees suggested that while they were undertaking these non-compliant activities, they were aware of safety concerns and made appropriate risk assessments so as not to cause damage to people or property.

"As a professional driver I occasionally find myself in a situation where I have to technically break the law but only when safe to do so. Examples refer to instances in the City or Greater London: Reversing up a one way street to access a delivery point safely, parking on single or double yellows either waiting for access to the delivery point or due to lack of suitable parking for a legal break, making illegal turns at junctions due to access issues (parked cars, NIMBY²⁷ restrictions, junction profiling, street furniture etc.) so I can find a safe way to the delivery point without causing damage." (Driver, Haulage, Standard)

²⁷ "Not in my back yard"

- Situational non-compliance occurs when the situation 'forces' an individual to knowingly violate a rule or regulation
- This is particularly an issue in relation to parking and drivers' hours
- Situational non-compliance can be considered acceptable if there are no safety implications

6.4.4 Optimising non-compliance

Optimising violators choose to ignore certain rules and regulations in order to benefit as an individual or organisation. As shown in Figure 40 and Figure 41, non-compliance is perceived by some to save money, increase productivity and enable drivers to earn more money.

At a management level, non-compliance may also be perceived to optimise the organisation's financial position, at least in the short term, for example:

"If they aren't caught then they [organisations] benefit quite frankly. Save money on training, on fixing problems with vehicles, save financial penalties from customers for being late." (Driver, Other, Standard)

"They can do the work at cheaper rates which has a knock on effect on us compliant organisations." (Manager, Haulage, Standard)

Optimisation can also occur on a more practical level with drivers not complying with certain rules in order to maximise their output for personal gain (see also Section 6.5.3), or to meet customer demands, often at the behest of their employer.

"I think, if you work for a smaller company, again, because profit is at the top of the agenda, again, sometimes it's a case of the people are willingly, sometimes even coerced if it happens to be for money, to do things that they know are wrong." (Manager, Other, Standard)

"In practice, I completely ignore [the London Lorry Control Scheme rules] because if the customer wants something delivering on a Sunday then it gets delivered on a Sunday. We do a lot of work with companies related to Crossrail, taking equipment to and from sites. It has to be there on a deadline because that's when the spares is available or it's got to be out by a deadline because that's when they need the spares back. And that's all there is. You get on and do it." (Driver, Haulage, Standard)

See Section 6.4.1.5 for more information on this.

- Optimising non-compliance is a means of increasing an organisation's profit or meeting customer demands
- It can occur at a management and driver level

6.4.5 Perceived responsibility for compliance

Survey respondents were asked who should be responsible for various aspects of compliance, as shown in Figure 39. It can be seen that drivers and managers/owners generally agreed over where responsibility for compliance lies, although there were some differences:

- Operator compliance was deemed by both drivers and managers/owners to be the principal responsibility of company owners/directors and the transport manager/CPC holder. Managers/owners were significantly more likely than drivers to select these options ($p=0.011$).
- Two thirds of both drivers and managers/owners felt that vehicle compliance was the driver's responsibility; 71% of managers/owners felt that it was also the transport manager/CPC holder's responsibility, while only 48% of drivers felt the same (this difference was statistically significant, $p<0.001$). Managers/owners were also significantly more likely than drivers to believe vehicle compliance to be the responsibility of drivers' line managers ($p=0.019$).
- Responsibility for compliance of drivers lies mainly with the transport manager/CPC holder according to both groups, and managers/owners were significantly more likely than drivers to select this ($p=0.048$). Managers/owners were also significantly more likely than drivers to state that responsibility for driver compliance lies with company owners/directors ($p=0.024$).
- Responsibility for compliant deliveries was principally assigned to drivers by both driver respondents (69%) and managers/owners (61%). Managers/owners were significantly more likely than drivers to believe drivers' line managers have responsibility for this ($p=0.004$). Delivery compliance was the one aspect of compliance that was deemed to be at least partly the responsibility of clients (20% of drivers and 14% of managers/owners assigned responsibility to the client).
- Compliance as reflected in general behaviour was also deemed to be principally the driver's responsibility (79% of drivers and 66% of managers/owners; this difference was statistically significant ($p=0.035$)). Managers and owners also felt that the transport manager/CPC holder had responsibility for this (65%), but drivers did not tend to hold this view to the same extent (32%); this difference was statistically significant ($p<0.001$). Managers/owners were also more significantly more likely to believe that owners/directors and drivers' line managers held responsibility for general driving behaviour compliance ($p=0.001$ and 0.015 respectively).

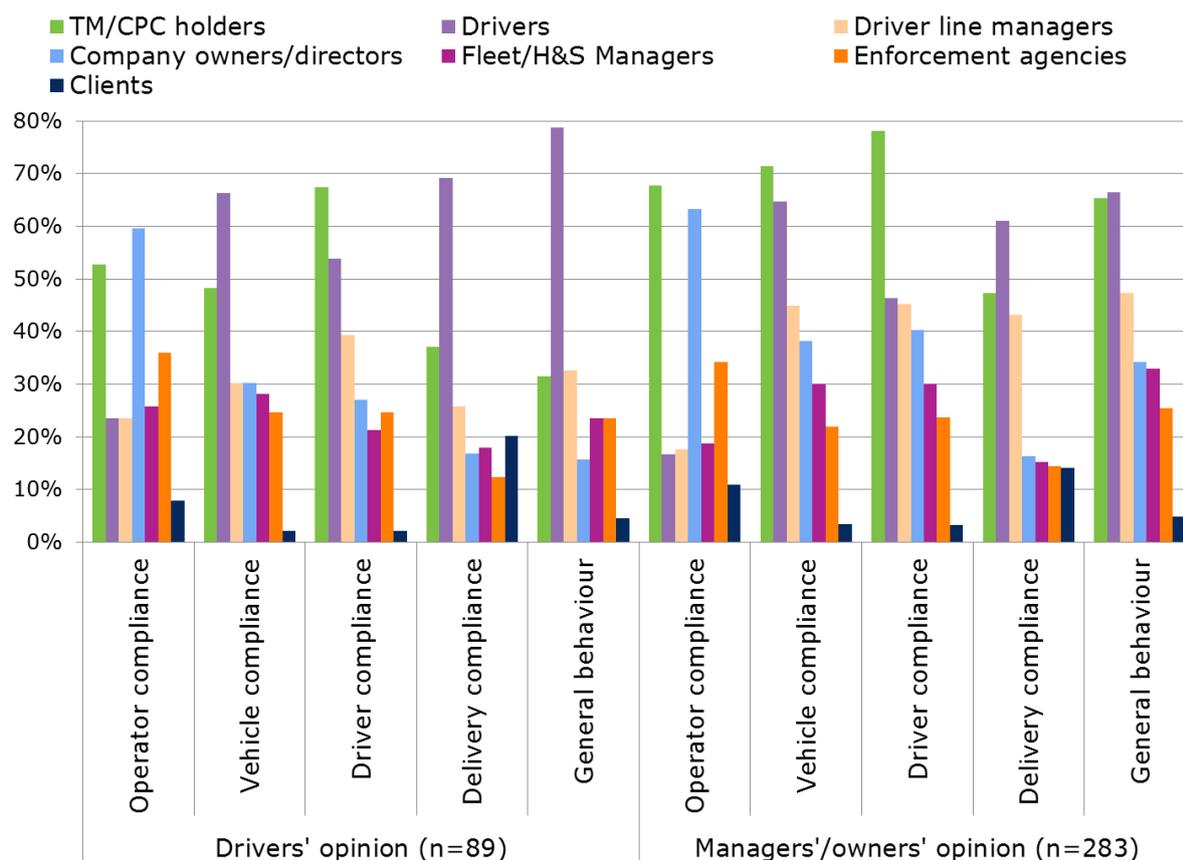


Figure 39. "Who do you think should be responsible for ensuring..." (excludes 'don't know' responses)

However some managers/owners expressed the view that they should not be held responsible for all aspects of non-compliance:

"How can I be responsible for my driver committing a moving traffic offence? There is only so much you can hold me culpable for, I can train and educate and put my driver through the CPC and everything else, but if they decide to ignore a traffic signal, then why am I held responsible, and I've got to write to the Traffic Commissioner explaining my driver's actions, it just seems a bit crazy."
(Manager, Haulage, Standard)

Comparison of the results between licence type showed that there was a significant difference between the perceived responsibility for driver compliance ($p=0.022$) between standard and restricted licence managers/owners; standard licence managers/owners more frequently thought it was the transport manager's/CPC holder's responsibility than restricted licence managers/owners. There was also some evidence to suggest that differences existed when comparing construction standard to construction restricted responses between the perceptions for:

- Operator compliance – driver's responsibility ($p=0.007$)
- Transport managers' compliance – drivers' line manager's responsibility ($p=0.023$)
- Transport managers' compliance – driver's responsibility ($p=0.045$)

Construction restricted licence managers/owners more frequently selected these options than construction standard licence managers/owners. However, these comparisons are

based on small sample sizes (n=81 construction standard and n=30 construction restricted) and therefore care should be taken when interpreting these results.

Drivers and managers/owners were also asked if they were not aware, partly aware or fully aware of their own responsibilities towards the different aspects of compliance. At least 99% of managers/owners stated that they were 'fully aware' or 'partly aware' of their responsibilities in all areas apart from delivery compliance; the same was true of drivers (excluding 'operator compliance'). Twelve percent of managers/owners²⁸ and 15% of drivers²⁹ stated that they were partly aware or not aware of their responsibilities with regards to delivery compliance.

- Transport managers and CPC holders are seen as having principal responsibility for most aspects of compliance
- Drivers tended to hold the opinion that they are also responsible for driver, delivery and general behaviour compliance; a smaller proportion of managers/owners assigned responsibility for these aspects of compliance to drivers
- Driver, manager and owner self-reported awareness of their own responsibilities with regards to various aspects of compliance is high, but lower with respect to delivery compliance

6.5 Motivators for non-compliance

Respondents were asked to describe what they thought the motivation behind organisational or driver non-compliance was. Some of the ideas brought forward by the interviewees applied to organisations as a whole; however, some were specifically related to each driver's and organisation's management separately.

6.5.1 General motivators

6.5.1.1 Lack of knowledge

Interviewees felt that 'lack of knowledge' was a key factor in non-compliance, and referred to members of the industry not keeping up to date with legislation (either deliberately or accidentally, for example not being aware of a change in regulations or legislation). They also suggested that there was a lack of training in legislative requirements, particularly for restricted licence holders. A distinction was often made between operators and drivers who choose to remain ignorant while being aware that regulations exist, and those who are truly unaware of the regulations to which they should be adhering.

"Sometimes it is down to a lack of knowledge, especially in the case of maybe restricted licence holders." (Owner, Haulage, Standard)

"I've got one of my guys, he took his CPC back in the early 80's, and I have to keep prodding him about changes in the law because he still keeps going on about the things he used to do back in the 80's." (Manager, Construction, Restricted)

²⁵ n=271

²⁹ n=84

"I think there's more rules and regulations in London, there's more option to break the rules. I think in a lot of cases people tend to be non-compliant in error." (Manager, Haulage, Standard)

"Definitely ignorance, people don't realise they're not complying." (Manager, Other, Restricted)

There was some evidence from survey respondents that lack of knowledge or awareness of the rules, may be particularly prevalent amongst drivers who are not familiar with driving in London.

"There's certain things that if you're not used to working inside the M25...if you're not used to some of the differences then you're not going to be fully aware." (Manager, Other, Standard)

However, there was a sense that the driver and transport manager CPC training equips people with the knowledge required to meet all compliance regulations (for more information see Section 6.11.1).

6.5.1.2 Time constraints and pressures

Drivers or operators choosing not to adhere to the regulations due to the time or effort involved was also seen by many respondents as a root cause of non-compliant activity.

"I think a lot of issues with drivers, in some cases they can't be bothered...it's not until they get caught and prosecuted that they realise the importance of walk around checks." (Manager, Haulage, Standard)

Another frequently mentioned reason for organisational and driver non-compliance was related to time pressure.

"Certain drivers are under time pressure and time scale to make deliveries. If they don't make the delivery then they don't get the stuff on time or they might be on a bonus." (Manager, Other, Restricted)

Some interviewees suggested that time pressure leading to non-compliant behaviour is often a result of client-specified delivery times and the volume of traffic in London causing congestion. The types of non-compliance mentioned related to this were driver working hours and legal parking.

"Yes, we will often find examples of drivers that feel under pressure to get to the next drop and instead of stopping at roadside and saying, I have a problem with my vehicle, they try and push it to the next stop to keep the client happy." (Manager, Construction, Restricted)

"Yes, booking in times in places in London. You'll go to a site sometimes, you're booked in for say 9 o'clock, you'll get there and there's another vehicle already in...it's happened to us a couple of times, and then you're parked up out on a red route and you get a ticket just like that, because you can't get in even though you're there for your booked in time." (Manager, Construction, Restricted)

6.5.1.3 London-specific regulations

Many interviewees also felt that some compliance problems are as a result of the rules associated with the London Lorry Control Scheme, with suggestions that the permitted routes for HGVs were illogical, outdated, and could be more flexible when other roads

are closed. It was expressed by some respondents that the London Lorry Control Scheme along with an increasing traffic density leads to people 'cutting corners' and finding it difficult to park and unload.

"What it does, it stops essential users getting to destinations on the safest and quickest route...TfL want to reduce CO₂ emissions by 60% and London councils are putting 60% onto your journey time...you don't want lorries going all round London, but the routes are so outdated. They're 30 years out of date." (Manager, Construction, Standard)

"How can it make sense to send HGVs miles off route to stay within the London Lorry control scheme? This occurs every day and night costing thousands of pounds per day." (Manager, Haulage, Standard)

6.5.1.4 *Situational factors*

It was felt strongly that drivers and organisations do not intend to be non-compliant, and that sometimes environmental situations or human error lead to regulatory non-compliance. Such unplanned 'situational' non-compliance may include; needing to park illegally to take a required break or make a delivery, being delayed by roadworks or heavy traffic (and therefore exceeding drivers' hours requirements before reaching the destination and not being able to park to rest due to parking restrictions), and minor vehicle defects which are deemed as 'safe' to continue driving with until returning to base. Whilst the driver may be aware that they are non-compliant in situations such as these, there was a feeling that they are forced to commit violations in order to carry out their work:

"Because of so many restrictions everywhere you have a choice of which restriction you're going to break. You have to use common sense which is going to be the lesser penalty if you're caught." (Driver, Construction, Standard)

"From what I've witnessed myself I'd say that probably half of the operators would probably struggle to remain compliant with all the aspects they're required to. London is not a very conducive environment to operating a lorry to be brutally honest." (Manager, Other, Standard)

- Non-compliance may be motivated by:
 - a lack of knowledge of how to achieve compliance, amongst drivers and managers/owners – changes in regulations is a key area where knowledge may be lacking, even some years after the change
 - time pressure placed on drivers, either by themselves or by their management or clients
 - the perceived difficulties associated with complying with the additional regulations present in London
 - situational factors in which an individual feels 'forced' into non-compliance

6.5.2 *Organisation-specific motivators*

Money was a key theme when discussing what motivates organisations to not comply. The cost of compliance and the financial savings associated with non-compliance was one of the most frequently cited reasons.

"Probably cost is the biggest problem I'd have thought. Basically every repair can cost an absolute fortune, its money at the end of the day that they can't make." (Manager, Construction, Restricted)

"Cost. It's always down to cost. The operators look at it as, they're just paying money out all the time and they don't seem to get anything back." (Driver, Construction, Standard)

"People always say there should be no profit without compliance. But the converse is equally true. There will be no compliance if there's no profit, because if they're not making a profit...operators will cut corners on the red tape, because it's expensive, and they need to make profit. You know, if they don't make profit, they're out of business. Any consideration of regulatory compliance has to consider both sides of this position." (Transport solicitor)

"Some non-compliant operators seem to get away with costs that compliant operations are paying for." (Owner, Haulage, Standard)

"Times have been extremely tough over the last couple of years, margins have been cut for your general freight haulier and they continue to be cut so it's been very tough for them – vehicles haven't been replaced – that means that you've got additional repair costs which may not have been factored into business plans." (Traffic Commissioner)

It was also felt that non-compliant operators have a competitive advantage over compliant operators, and so are more likely to win work (at least until they are found to be non-compliant):

"If they aren't caught then they benefit quite frankly. Save money on training, on fixing problems with vehicles, save financial penalties from customers for being late." (Driver, Other, Standard)

"I regularly lose work to substandard operators who undercut my costs because they have no compliance. They are winning work for Met Police, local councils and TfL who turn a blind eye to compliance of suppliers when it saves them money." (Owner, Haulage, Standard)

This was supported by the survey. Respondents were asked how much they agree that compliance saves the organisation money, and how much they agree that non-compliance saves the organisation money. As shown in Figure 40 and Figure 41, 66% agreed or strongly agreed that compliance saves money, while 37% agreed or strongly agreed that non-compliance saves money. The same questions were asked about compliance costing money: 59% agreed or strongly agreed that compliance costs the organisation money, while 34% agreed that non-compliance costs money. These findings in conjunction with the free text and interview responses indicate that compliance is seen as a double-edged sword financially, with short-term costs to become fully compliant, but long-term costs if and when the organisation is found to be non-compliant. The costs of maintaining compliance (both up-front and hidden) were described by one survey respondent:

"Whilst we fully accept that increased safety is an absolute requirement, and we support all initiatives, I don't believe people realise the full extent of the costs attached. It's all very well having training courses for drivers funded by TfL, but there is still a huge cost implication on an operator. Those drivers have to be

taken off the road during the week, or paid overtime at the weekend, plus there are travelling costs to and from the training venue, but something that nobody seems to appreciate is that often the truck will stand for the day, losing up to £600-per-day in revenue - on top of all the above costs. We have the majority of our drivers fully trained (Safe Urban Driving and Crossrail inducted), which costs us close to £2,000 per driver. Our specialist vehicles aren't something we can put agency drivers into, and it's not always possible to have someone else available within the company to drive.” (Owner, Haulage, Standard)

Such costs would be a significant barrier to maintaining compliance for some organisations. Respondents also mentioned that clients may not be aware of the costs involved in running a compliant fleet, or may not be concerned about procuring the services of a non-compliant organisation (with cheaper costs) in favour of a fully compliant organisation:

“Being non-compliant is more profitable. Big purchasers do not check for non-compliance in tenders and even turn a blind eye to get the best price. I am compliant and it cost me work yet I often see sub-standard recovery operators winning government contracts.” (Owner, Haulage, Standard)

“I do not think that many of our customers would understand what a fully compliant vehicle is, therefore I do not strongly agree that a fully compliant vehicle is a good marketing tool.” (Manager, Other, Standard)

“The operator can do work cheaper, undercut the legal operators. Some customers don't check to see if operators are legal. Asking for an insurance certificate is not making sure the supplier is legal.” (Client)

It was even suggested that some non-compliant operators may expect to be caught and are willing to accept this risk:

“The operators who tend to deliberately avoid following the correct way have no worries about going into liquidation and starting up again.” (Manager, Construction, Standard)

“Whilst they get away with it and there are no apparently effective countermeasures, these operators will continue to cut corners and turn a blind eye to illegal actions by drivers. This is because the numbers of Traffic Inspectors are limited and the chances of operating for years without being stopped or visited are high.” (Manager, Construction, Standard)

This view was counterbalanced by the view that non-compliant operators would struggle to remain in business, and that in the long-run, compliance saves money:

“If we were non-compliant we would have no customers and no business to operate.” (Manager, Haulage, Standard)

“They might save money by not servicing at the correct intervals, but in the long run, it would cost them more money.” (Manager, Haulage, Standard)

It was suggested that some organisations spend less on maintaining their vehicles (i.e. complying with regulations) and can therefore reduce their prices to undercut competitors, keep their businesses going or to increase their profits.

"I can't believe that people choose to do that because they think it's acceptable, I think they don't, someone else will undercut them or they need to make their ends meet." (Manager, Standard, Other)

"I suppose one could be to ward off competition and increase their profits knowing they could get some more work in and undercut other responsible operators." (Driver, Construction, Standard)

Some respondents felt that for some clients, cost was the key factor in selecting a supplier and were considered to be indirectly encouraging non-compliance.

"...the large clients go and pick the cheapest one that hasn't bothered." (Manager, Haulage, Standard)

However, some respondents thought that cost was not a justifiable motivation when compared with the consequences of not complying, particularly regarding vehicle maintenance regulations.

"There is not much cost saving involved in not complying. Because you just create problems down the line for yourself, for your trucks...and if it breaks down, and then your truck's not working, then if the wheels ain't turning, you ain't earning." (Manager, Haulage, Restricted)

6.5.2.1 *Perceived advantages and disadvantages of compliance and non-compliance*

Survey respondents were asked how much they agreed or disagreed with a number of statements relating to the possible advantages and disadvantages (mainly organisational) of compliance or non-compliance. Figure 40 shows levels of agreement with the statements regarding non-compliant HGV operations or detection of non-compliance. There was widespread agreement that non-compliance would result in greater scrutiny from enforcement agencies (see Section 6.10), financial penalties, an effect on the organisation's reputation (see Section 6.6.3) and bad publicity for the organisation.

Over half of respondents agreed that employees could be given a prison sentence, and that non-compliance could make organisational expansion difficult. There was overall uncertainty over whether non-compliance could cause an organisation to go out of business, and whether it would have a negative impact on the credit record. Opinion was split on whether non-compliance helps organisations to save money, or whether it costs money (interviewees referred to short-term costs but long-term gains, as mentioned in Section 6.5.2). There was also split opinion on the effect of non-compliance on drivers' ability to earn more money. Non-compliance was generally perceived to increase the amount of stress placed on managers, and to reduce productivity and driver availability.

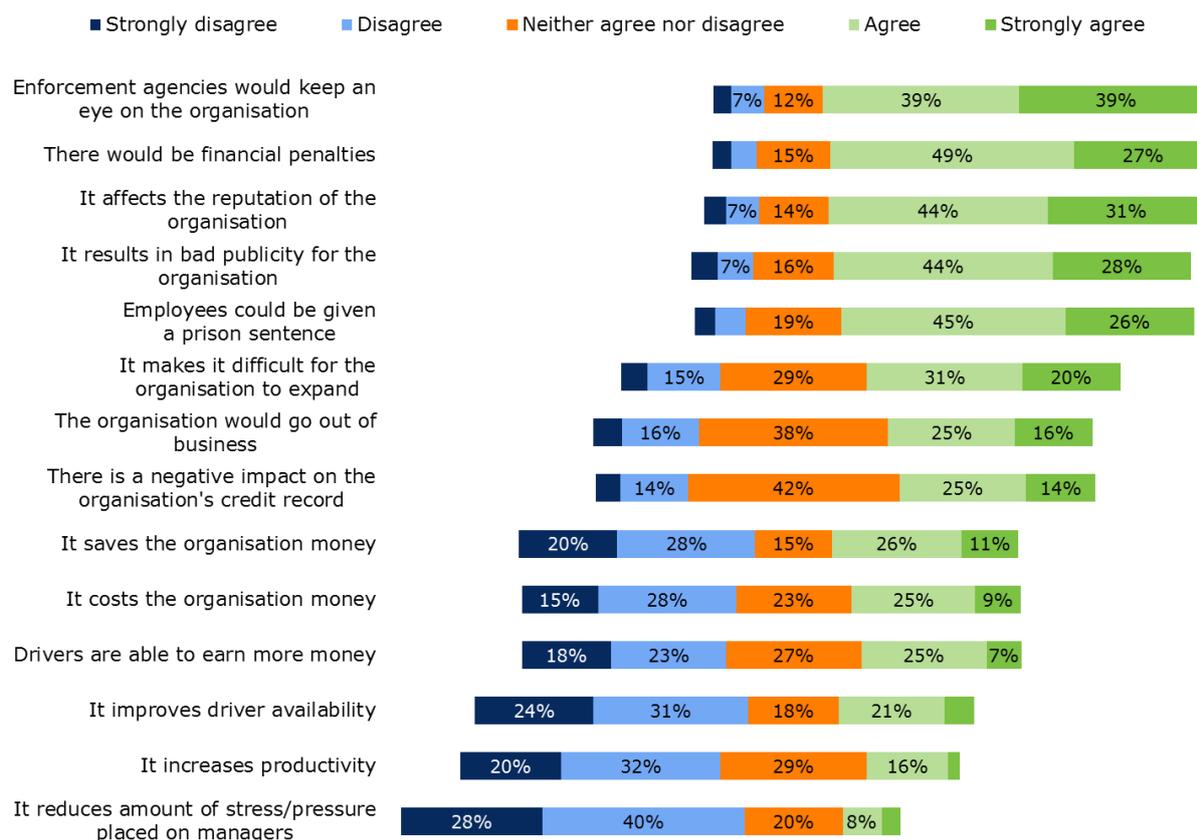


Figure 40. "Please state how much you agree or disagree with the following statements. When HGV operations are NOT compliant..."(n ranged from 338 to 347)

Figure 41 illustrates levels of agreement with a number of statements relating to the advantages of compliance. The greatest levels of agreement were associated with the safety aspects of compliance (that it makes drivers and vehicles safer, and reduces the risk of being involved in an accident). Over 70% of respondents also agreed or strongly agreed that compliance can be used as a marketing tool, and that it benefits the environment. Agreement with the remaining statements was high, with over 50% agreeing or strongly agreeing with each. The lowest level of agreement was with the statement 'compliance increases productivity'.

Whilst the responses shown in Figure 40 and Figure 41 suggest generally correct and positive perceptions of the effects of (non) compliance, there is still a proportion of responses that suggest negative or incorrect attitudes towards compliance. For example 19% felt that non-compliance increases productivity, 32% indicated that it helps drivers to earn more money, and 12% felt that it reduces the amount of pressure and stress placed on managers.

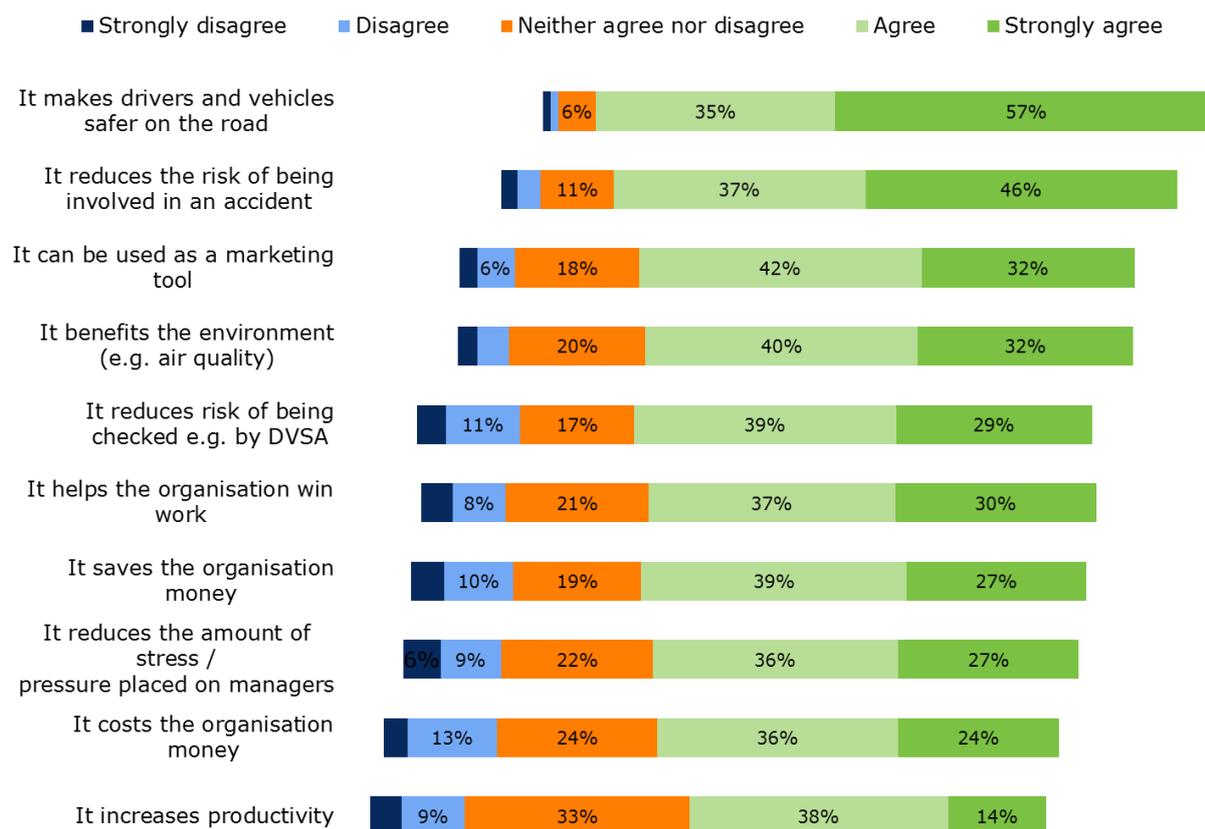


Figure 41. "Please state how much you agree or disagree with the following statements. When HGV operations are compliant..." (n ranged from 340 to 345)

- The cost of compliance is seen as a key barrier by some, at least in the short term; many respondents understood the long-term financial benefits of compliance however
- Non-compliant operators can be regarded as having a competitive advantage
- Some clients are perceived as preferring to use the services of a lower-cost, non-compliant organisation
- Non-compliance is widely believed to lead to greater scrutiny from enforcement agencies, financial penalties, a negative effect on the organisation’s reputation, bad publicity for the organisation, and greater stress for managers
- Compliance is widely believed to improve safety, be a useful marketing tool, benefit the environment, reduce scrutiny from enforcement agencies, reduce manager stress, and help the organisation win work
- There are some negative or incorrect attitudes towards compliance

6.5.3 Driver-specific motivators

Among drivers, interviewees’ reasoning behind non-compliant behaviour was much more personal. One of the most commonly cited reasons that drivers might not comply with the regulations associated with operating a HGV was pressure relating to their personal life. Personal factors, such as childcare arrangements, were cited as reasons for drivers being non-compliant to get home early or to take calls whilst driving.

"I need to get home at four o'clock, I need to be home for six o'clock, I need to do something. That's why drivers don't comply. Because something in their personal life means that they can't...they don't want to comply because it will affect their personal life...there's no other reason." (Owner, Haulage, Standard)

It was also suggested that some drivers have a lack of interest in compliance.

"From experience, the majority of drivers, they want to get in a truck, they want to make the delivery and they want to go home. They're not really interested in all of the compliance bits and pieces. With them, a lot of them are just running the gauntlet, and hoping that they don't make any mistakes, whether it be accidentally or deliberately." (Manager, Haulage, Standard)

Another reason for drivers not complying referred to by a number of respondents was for personal gain – either through bonus schemes that encourage non-compliant behaviour or through working overtime and exceeding the legal working hours.

"Well, personal gain would be the main motivator...if they've been paid extra to do the job by a load, e.g., not paid a salary." (Manager, Haulage, Standard)

"It's really down to how much money can I get out of the day; it might be that I need to get home for the weekend; it might be the [route] planners have made mistakes you know, you look at it and the roads these days seem to be shut all the time. And that puts huge pressure on guys to get their day going. Also it might be managers putting pressure on guys, but I would say the overriding one would be if I can make some more money, I'm not going to stick to the rules on this." (Driver, Haulage, Standard)

As mentioned in Section 6.2.4.3, respondents also believed that drivers may feel pressurised by their employers to not fully comply, or may be concerned about being less productive than their peers, with fears that this would affect their job security.

"There are some...who succumb to, you know...do a bit more work than they're supposed to because there's some pressure from the employer. Or sometimes the pressure comes from themselves, oh I'd better do it, you know, I'd better do 50 drops a day because otherwise my employer might sack me because I'm not as productive as some of the other people. So you know I've had people, drivers who do more than they're supposed to, even though the employer isn't actually putting any pressure on them as such." (Traffic Commissioner)

[What do you think motivates drivers to not comply?] "Pressure of losing a job." (Driver, Other, Standard)

"Drivers do tell me, you know, it's my job and if I don't do it I'll lose my job...unfortunately, there's a lot of fear in the industry...about not having a job, nobody or very few drivers out there really believe that, you know, they can walk out of one job straight into another." (Driver, Haulage, Standard)

The perceived effect of various types of incentives, bonuses and payment structures was explored in the survey. Drivers, managers and owners were asked whether these encouraged compliance or non-compliance, as shown in Figure 42. It can be seen that both drivers and managers/owners felt that incentives or bonuses for accident-free driving was the most likely to encourage compliance completely or somewhat (74% of managers/owners and 66% of drivers), followed by incentives or bonuses for fuel economy (61% and 54%). Pay per load was thought to be most likely to encourage non-

compliance somewhat or completely (65% of managers/owners and 51% of drivers), followed by 'job and finish' (64% and 43%). Productivity-related incentives and bonuses were also felt to increase non-compliance (50% of managers/owners and 44% of drivers), while over half of managers/owners felt that strict delivery timeslots also increase non-compliance (53%, compared to 36% of drivers). The difference in response between drivers and managers/owners was not significant at the 5% level.

The use of pay per load was felt to be a particular issue in relation to tipper activities (see also Section 6.2.4.4).

"Paying by the tonne inevitably means that operators want to shift more tonnage because they carry more tonnage, they get paid more. More importantly there's a higher risk of them making more runs...that means driving faster, and probably one of the fastest groups of HGVs on the road are your tippers...the more they get done, the more they get paid, often. Not necessarily the driver, unless he has performance related pay...but definitely the operator often stands to benefit."
(Transport solicitor)

Use of rewards to recognise drivers who improve compliance levels was reported by some respondents, for example:

"I have virtually got a scheme running internally myself which is based on the FORS scheme...I call it the professional driver's recognition scheme and as long as [they tick a lot of compliance-related boxes] I give them a bonus. That's for a silver driver. Then they go up to gold for more things that they have to do. So, very much the FORS bronze, silver, and gold standard, I do that with my drivers...the only trouble is, I'm making them wear silver and gold hats, which they're not too happy about." (Manager, Construction, Standard)

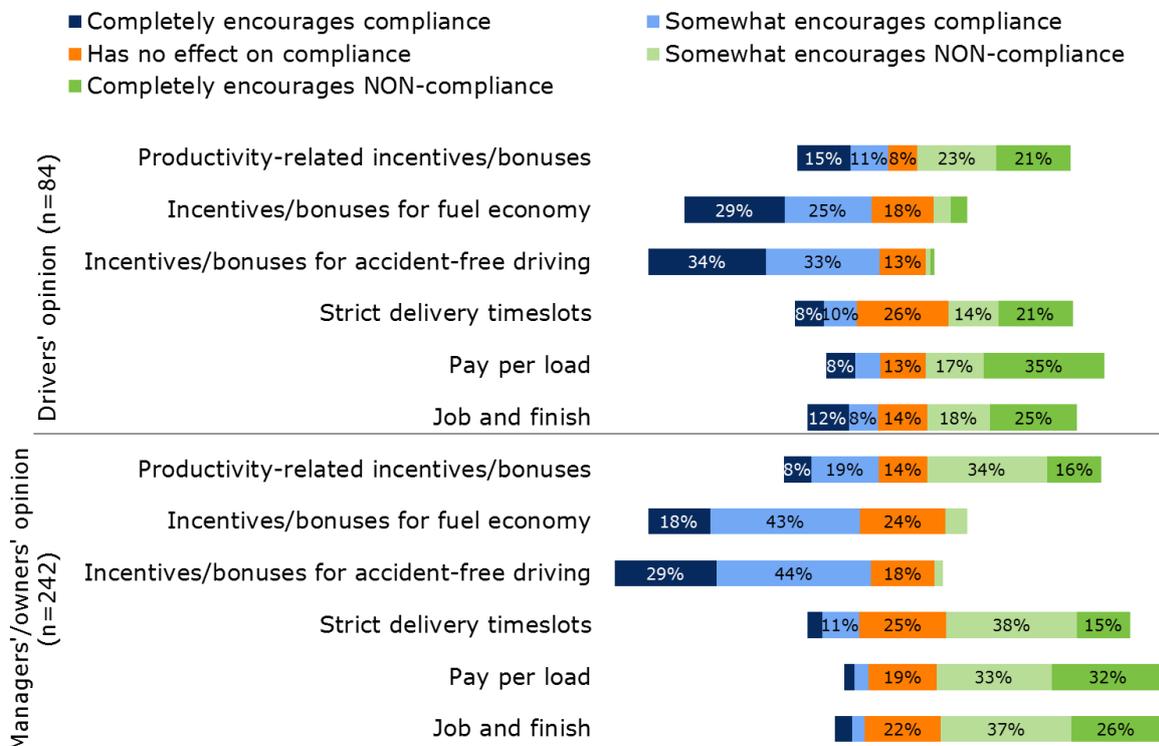


Figure 42. "What effect, if any, do you think the following practices have on general compliance?" (excludes 'don't know' responses)

- Driver compliance can be affected by:
 - issues in their personal lives
 - bonus or incentive schemes, in particular pay per load and job and finish
 - organisational factors and culture

6.6 Consequences of non-compliance

Questions in both the survey and the interviews sought to gain an understanding of how aware participants were of the consequences of non-compliance in terms of safety and legality.

6.6.1 Safety consequences

Interview respondents were asked to describe the HGV industry's levels of awareness of the dangers of non-compliance. While on the whole, respondents suggested that awareness levels were high in relation to the dangers of non-compliance, not all respondents thought that non-compliance was dangerous.

"I think the general level of awareness is good. I don't think there are operators out there that bury their heads in the sand and are not aware of what could happen." (Manager, Construction, Restricted)

"There aren't any dangers of not complying. It's not dangerous to not comply, there's no danger involved in it." (Owner, Haulage, Standard)

"I have no idea what the dangers of non-compliance are." (Driver, Haulage, Standard)

Respondents also felt that communication issues within organisations may result in some people being ignorant of the dangers to safety associated with non-compliance (see also Section 6.7.2). Specifically, respondents talked about top level management either not being aware of changes in legislation, or not passing this information on to the drivers.

"I'd probably say [our understanding of safety consequences is] reasonable but, again, it comes down to the fact that I think that if people don't inform their staff as to what the consequences could be." (Manager, Other, Standard)

- A small proportion of respondents believed that non-compliance has no safety consequences
- Communication within organisations regarding the safety consequences of non-compliance may be poor

6.6.2 Legal consequences

In terms of the legal consequences of non-compliance, there were mixed responses from interviewees. Some managers, for example, felt that they had a good awareness of the legal consequences of non-compliance.

"It's high. We all know what's going to happen if we don't do it properly." (Manager, Haulage, Standard)

However, a number of respondents reported a lower level of awareness, especially among drivers.

"I know for myself it [my awareness of the consequences] is probably not as much as it should be because I don't know if I don't comply on a certain aspect of my day's work I don't know what all the legal consequences are...maybe I should know more about the legal side of things." (Owner, Other, Standard)

"I don't think that we're touching the drivers [in terms of their awareness of legal consequences], drivers who have been called to a driver conduct hearing (which is a separate jurisdiction from the public inquiry), a lot of them come here with the attitude of 'I've already been dealt with by the magistrates court – I've already been punished' and they don't appreciate that there's another jurisdiction to think about assessing their future conduct, to assess their fitness." (Traffic Commissioner)

"Perhaps one area where there is great weakness is driver awareness of the risks to them, of non-compliance, in terms of they can lose their vocational driving entitlement if not their full driving entitlement. They can go to prison for falsifying tachograph charts, for example. They can go to prison if they have a bad accident and it involves a fatality or a serious injury in certain circumstances...that's where there's a weakness." (Transport solicitor)

It was suggested that awareness among managers of the legal consequences affecting drivers might be higher than those affecting the organisation.

"I think most of them are aware from a driver's perspective, of what you might face...I think a lot of them are then surprised that the company can be prosecuted for additional offenses on top of quite often what the driver's done." (CVU representative)

The interview data suggest a difference in awareness of legal consequences between large and smaller organisations. It was felt that in larger organisations, there was a clear understanding of the legal consequences and often there was a dedicated person in place to take responsibility for this. However, there was a perception among the interview respondents that when it came to smaller and medium sized organisations, knowledge of the legal consequences may be less clear.

"I think that's low to medium [awareness]. I think there is a big...there is a void, and again, it depends on the type of company. I think your big corporate companies are fully aware; it's the medium to smalls [that are less aware]." (Client)

"Small own account operators, where they just maybe operate one or two trucks and the truck isn't their main businesses, and they might not be too aware or bothered by all of the rules and regulations and complying." (Driver, Construction, Standard)

Survey respondents were asked to rate their knowledge of the legal consequences of non-compliance for themselves and for their employer (drivers) or organisation (managers/owners). Figure 43 shows that managers and owners clearly feel they have a good knowledge of the consequences both for themselves and their organisation (around 95% 'good' or 'very good' for both consequence types). Drivers, however, reported a much lower level of knowledge, with just over half saying they had a good or very good

knowledge of the consequences of non-compliance for their employer, and 64% for themselves. This difference between respondent types was significant at the 5% level ($p < 0.001$ for both questions).

In addition, differences were observed between standard and restricted licence managers/owners; restricted licence respondents reported a lower level of knowledge of the consequences both for themselves and their organisation than standard licence respondents (around 88%³⁰ 'good' or 'very good' compared with around 98%³¹ for both consequence types). However, when sector was controlled for (i.e. comparing just construction 'standard' to construction 'restricted') this significant difference was not present and therefore caution should be applied to these results due to the possibility that it was not due to license type, but was caused by the different sectors that tend to make up standard and restricted licence holders.

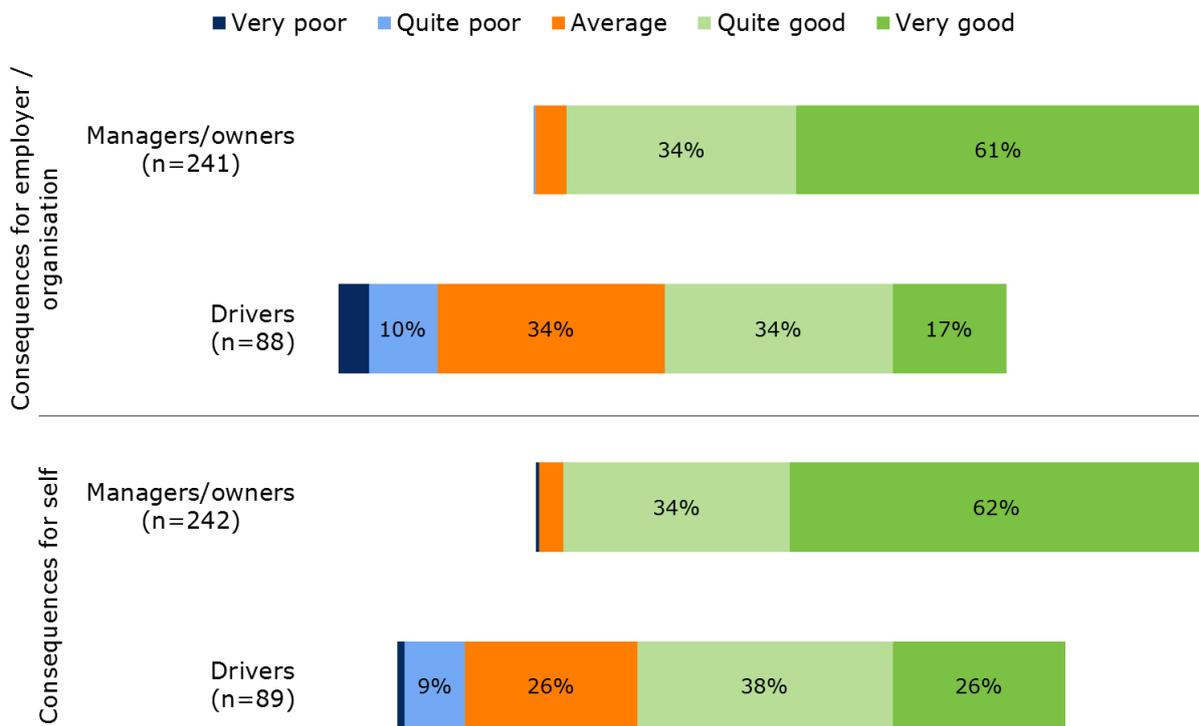


Figure 43. "How good do you think your knowledge is of the legal consequences for yourself or your organisation/employer if you do not comply with all rules and regulations?"

- Awareness of the legal consequences of non-compliance could be improved, especially among drivers and in smaller and medium-sized organisations
- Managers/owners reported a better level of knowledge than drivers of the legal consequences of compliance

³⁰ n=50

³¹ n=192

6.6.3 Reputational consequences

Non-compliance was considered to have a negative effect on the reputation of both individual organisations and the industry as a whole.

"Non-compliance is a risk to our business because it could affect the reputation of our company and potential clients even are more mindful of, you know, how our performance is in this area. So it's a risk for our business, it's a risk for our people." (Owner, Haulage, Standard)

"Not compliant companies run the risk of ultimately destroying their company both by reputation and finance." (Manager, Construction, Standard)

"Operating without being fully compliant sends the wrong message to the public and results in a general lowering of public respect for our business sector." (Manager, Construction, Standard)

This is also associated with lost revenue for organisations found to be non-compliant.

"They had one incident with their lorry on its side and everyone remembers the name of their lorry and the branding, and obviously that bad publicity cost them millions." (CVU representative)

Likewise, high levels of compliance were associated with benefits for the reputation of organisations, which has benefits both for winning business and attracting more 'professional' drivers.

"The better operators, I think, see compliance actually works for them; their drivers drive better because they're driving vehicles that are well-maintained, they become seen as more reliable; and they get a reputation and get more work." (Traffic Commissioner)

"Seen as a professional company with high standards." (Manager, Construction, Standard)

"Compliance attracts quality drivers." (Owner, Construction, Standard)

- Non-compliance can have negative consequences for an organisation's reputation
- The reputation of the industry as a whole can also be diminished through non-compliance

6.7 Safety culture

Safety culture within an organisation can be defined as 'the product of individual and group values, attitudes, perceptions, competencies, and patterns of behaviour that determine the commitment to, and the style and proficiency of, an organisation's health and safety management' (Health and Safety Commission, 1993). This section explores the respondents' views on the relationship between safety culture and compliance, including the role of communication.

6.7.1 Safety culture and compliance

It was acknowledged by some respondents that a good safety culture within an organisation – both in the office and on the road – is necessary to achieve a compliant fleet and workforce. Interviewees reported a strong link between general safety culture and attitudes towards regulatory compliance for HGVs.

"It comes from the top down. It does yes, if you have a good attitude from the people above you and the drivers then that means that there's, you know, everybody has a positive attitude towards it." (Manager, Construction, Standard)

"A safe working company would be more of a compliant company. If a company is worried about safety they'd also be worried about compliance and all other aspects." (Manager, Other, Standard)

"A strong company compliance culture, improves productivity and aids worker recruitment, retention and confidence in the organisation. This improves morale and allows cost savings to be made in reduced accident and non-compliance costs as compliant companies tend to attract better drivers, who are less risky." (Manager, Other, Standard)

"If you have a safe working environment in the office, that culture passes up and passes down." (Client)

"I suppose I've been quite privileged for numerous years now to work for a large organisation where it's a cultural thing, you know, it [compliance] is drummed into you as a belief. And, obviously, once you've been exposed to that culture you realise that there is no reason for cutting corners, profit or not, you know, it's...the rules are there for a reason." (Manager, Other, Standard)

The safety culture of an organisation is perceived as being linked to the likelihood of routine non-compliance occurring; by improving the safety culture to include checks and activities which should be completed on a regular basis, the risk of non-compliance is reduced.

"If you can get your drivers to conduct proper walk rounds, then you're saving yourself money with the maintenance contractors. If only we could get it as part of the culture." (Traffic Commissioner)

Even where a positive safety culture is generally present within an organisation, this does not always extend to drivers on the road (echoing the findings of Delmonte et al., 2012). This respondent referred to scaffolders in particular:

"That health and safety culture goes out the window when they get in their lorry. They don't see driving their lorries as the same, as an extension of their health and safety responsibility. Whereas normally you know the expectation would be that if the organisation takes health and safety responsibly in one area they'll do exactly the same in the other." (Traffic Commissioner)

The prevalence of a positive safety culture is also expected to improve the willingness to report non-compliance observed within the organisation and in other organisations.

"I would expect them to all be [reported], hundred percent. Even if it's a misunderstanding, we make sure that people understand that it wasn't a non-compliance or it was a non-compliance, and we have resolved it. There is definitely a strong culture of that." (Manager, Construction, Standard)

It was felt that in order to build a strong safety culture, non-compliance needs to be addressed in all cases. Inconsistent responses to non-compliance may have a negative effect on safety culture.

"[Drivers will be disciplined for non-comp] because...we're known as a very safety conscious company and if you let one bloke get away with it another one will follow as a culture." (Driver, Haulage, Standard)

All interviewees reported that their organisations had a good safety culture; however, some acknowledged that there was always room for improvement. Drivers were less likely than managers/owners to agree that they are able to influence levels of compliance in their organisation, as shown in Figure 44. While 92% of managers/owners indicated that they feel able to influence compliance levels by agreeing or strongly agreeing with the statement, only 58% of drivers felt the same way. This difference was significant at the 5% level ($p < 0.001$).

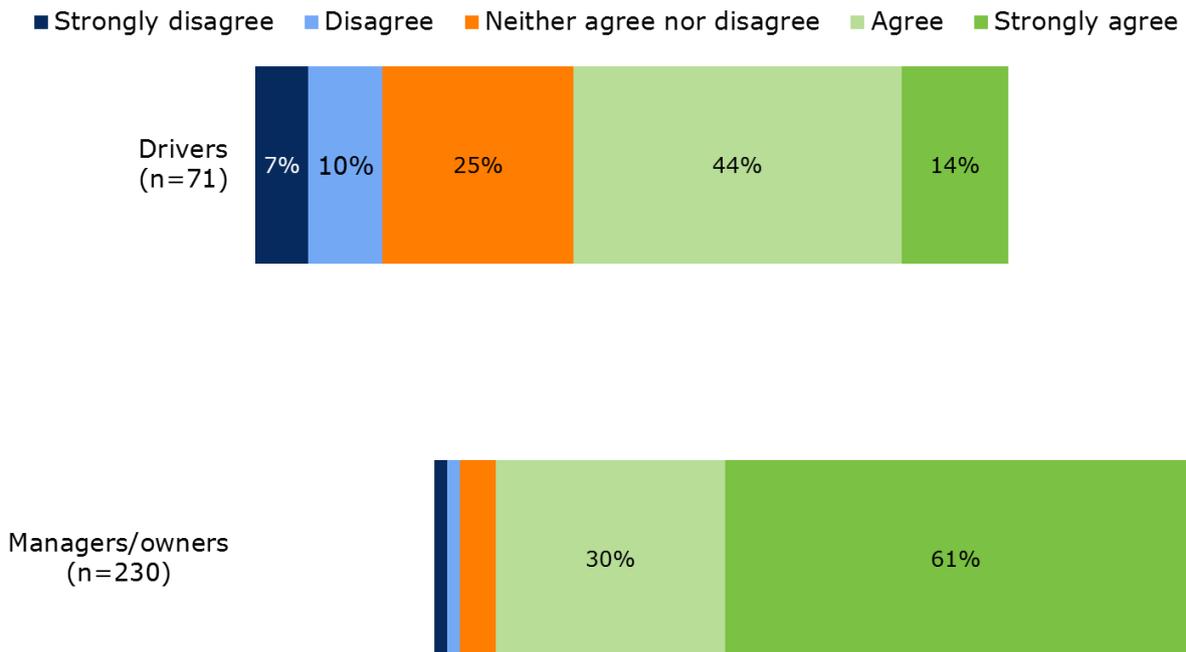


Figure 44. "I can influence levels of compliance in my organisation"

Feeling able to influence levels of compliance in an organisation is key to encouraging staff to report any non-compliance that they observe (see Section 6.9), and a positive safety culture is an important element of encouraging staff to feel empowered to report and improve compliance.

"From a driver's point of view, he's got to feel empowered to make change. So that's got to be down to the culture within the company, rather than the driver's own belief. If he believes something's going to happen as soon as they saw him sticking his hand up, then he's more likely to stick his hand up." (Manager, Construction, Standard)

"If you have that culture of supporting people to say something's not right, then drivers will be more likely to say I can't drive this vehicle, it's not right, rather than them wanting just to get out and earn money." (Client)

Interview respondents were asked whether their organisations had a dedicated person in place with the sole responsibility for safety. Some interviewees indicated that the management of safety was undertaken by more than one person, for example, a mixture of senior management, dedicated transport managers or health and safety managers.

"So in terms of the structure here it's kind of the fleet manager, the day-to-day management and then he reports to me and I take responsibility overall for that."
 (Owner, Haulage, Standard)

- A positive safety culture is perceived to enable a compliant fleet and workforce
- A positive safety culture may also be related to increased reporting of non-compliance
- Organisations do not always have a dedicated individual responsible for managing safety
- Drivers were less likely than managers/owners to agree that they are able to influence levels of compliance in their organisation.

6.7.2 Communication

Good intra-organisational communication of (changes to) rules and regulations was seen as key for achieving compliance, particularly given the additional requirements for operators in London (see also Section 1.1).

"London has a whole raft of its own issues but these are easy to work with if the correct information is disseminated." (Driver, Haulage, Standard)

Managers and owners tended to agree or strongly agree that there is good communication in their organisation about compliance issues which affect them (89%), but drivers were significantly less likely to agree with this statement (75%) and were more likely to disagree or strongly disagree (17% of drivers and 5% of managers/owners) ($p=0.004$), as shown in Figure 45.

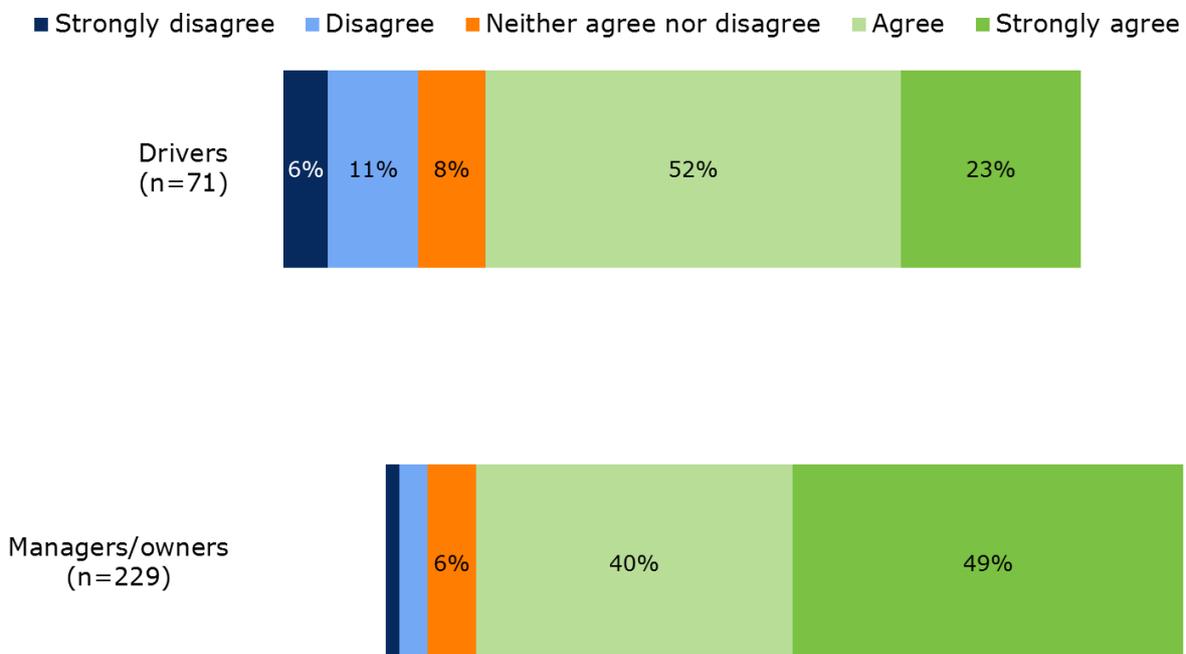


Figure 45. "There is good communication in my organisation about compliance issues which affect me"

- Good communication within organisations is seen as key to managing compliance
- Managers/owners thought there was good communication about compliance issues which affect them; drivers were less likely to agree

6.8 Agency and non-GB drivers

Two specific types of drivers were explored in the survey and interviews; these were agency drivers and non-GB drivers. These drivers were believed to be at potentially greater risk of being non-compliant, as described in the following sections.

6.8.1 Agency drivers

Agency drivers are often seen as 'different' to other drivers, with 65% of drivers, managers and owners stating that 'agency drivers are seen differently'. Managers/owners were significantly more likely to agree with this statement (68%³²) than drivers (52%³³) ($p=0.01$).

In addition, there was a significant difference in responses between manager/owners with standard and restricted licences; restricted licence respondents were significantly more likely to agree with this statement (57%) than standard licence respondents (72%) ($p=0.033$). The same difference was also observed when responses were restricted to manager/owners from the construction sector ($p=0.045$).

Of ten agency drivers who responded to this question, 80% felt that they are seen differently. This difference was often a negative one; when asked to explain why they felt agency drivers were seen differently, survey respondents described agency drivers as:

- Unreliable
- Unpredictable
- Unprofessional
- Less careful/capable/skilled
- Accident prone
- Having a poor or unknown level of training and experience
- Having no/less respect for vehicles and customers
- Having inadequate knowledge of the product/company
- Being resented by full time drivers as they earn more
- Being lazy/having personal issues
- Not being given same training/instructions prior to a job, so more likely to be in an incident
- Not staying with organisations for long enough to embrace their safety culture

³² n=288

³³ n=77

- Being able to move to another job easily, therefore avoiding consequences of any non-compliance
- A 'last resort'

"Agency drivers often receive inadequate instructions/training/assessment prior to work, so can be prone to more mishaps. Also, I feel that some agency drivers don't care, knowing that if they 'muck up', the agency will just place them somewhere else the following day." (Driver, Construction, Standard)

"Agency drivers tend to be ones that cannot settle...agency drivers often have more than their fair share of personal problems which stops them from turning up for work and therefore makes them unreliable. Agency drivers are often not at companies long enough to embrace the safety culture of the company they work for." (Manager, Construction, Standard)

"The agency pool is very hit and miss. In my opinion less than 10% of agency drivers are reliable and/or experienced enough to operate anywhere, let alone in central London." (Manager, Construction, Standard)

The use of agency drivers was suggested to be higher in London than other parts of the UK due to the more fluid job market in the capital, meaning driver retention is more difficult.

"In London, the operators I speak to struggle to have a consistent level of driver retention and they have a high turnover and therefore rely, to a large proportion on agency drivers, which are drivers supplied by employment agencies. And they are inherently higher risk, because they're usually less experienced because that's why they're working for the agencies, and they are also less highly trained...they represent a higher risk of non-compliance." (Transport solicitor)

Some respondents suggested that agency drivers may be more prone to non-compliance as a result of management perceptions and treatment of agency drivers:

"They are regarded as more 'helpful' (i.e. more easily pressured into working faster/longer and less likely to refuse defective vehicles and over-weights). Poorer wages and much more flexible on working hours (start times and shift length)." (Driver, Other, Standard)

"Because the agency drivers at the company are on a day rate they tend to be made to do additional work after their deliveries have been completed so that the company feels that they are getting their money's worth from the agency." (Driver, Haulage, Standard)

"Within the industry I believe that a dual standard exists where there is a culture of 'there are the keys off you go', however I have addressed this within my organisation ensuring the quality of worker and their knowledge / experience before involving them with my customers." (Manager, Construction, Restricted)

Respondents also recognised that there are some positive aspects associated with agency drivers, mentioning that:

- They are more experienced in different roles/vehicles
- They allow flexibility

"They are incorrectly considered to be more careless than companies own regular drivers. This is incorrect as agency drivers tend to have far greater experience of different vehicles, load types and locations than regular drivers." (Driver (agency), Other, Standard)

They may also be perceived by other drivers as receiving preferential treatment and better pay, although this view was not consistent.

"Treated better by company, paid a lot better than company employees." (Driver, Haulage, Standard)

"Generally paid higher. Given easier/better work than employed drivers." (Driver, Haulage, Standard)

"Less pay, given worst jobs, not looked after as much as full timers." (Driver, Other, Restricted)

This attitude was verified by another respondent who felt that agency drivers often get a raw deal, and that organisations often hire agency drivers based on price rather than suitability for the job.

"Although agency drivers are...an integral part of the logistics sector, there is still a 'look down your nose' attitude with many staff drivers and transport staff. Many agencies operate well within the law and indeed lead the industry in best practice. The issue will always be though that quality costs more money and many operators still look at the headline price of agency drivers than at the final invoice value." (Driver, Haulage, Standard)

Managers, owners and drivers were asked whether management are able to deal appropriately with agency staff who have been found to be non-compliant. Drivers and managers/owners differed in their response to this (see Figure 46), with 83% of managers/owners agreeing or strongly agreeing, compared with 27% of drivers (all of whom agreed; none strongly agreed, and 19% strongly disagreed).

■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

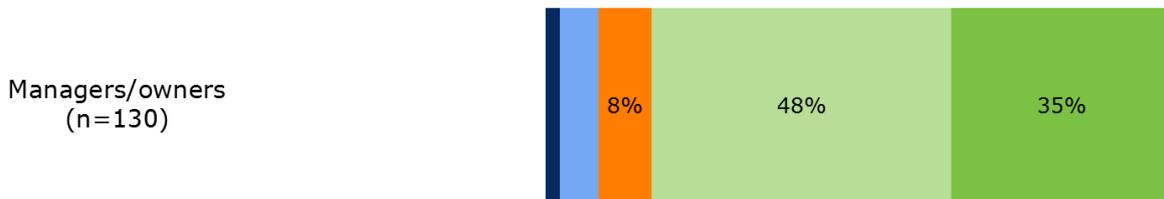
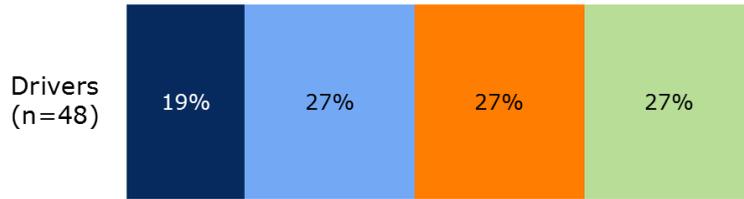


Figure 46. “Management feel able to deal appropriately with agency staff who have been found to be non-compliant”

- Agency drivers are generally considered to be ‘different’ to staff drivers; managers/owners thought that agency drivers are often seen as ‘different’ to other drivers more frequently than drivers themselves
- Negative opinions of agency drivers were common, and included the views that they are more likely to have poorer levels of training and experience and to be involved in accidents
- Management may place extra pressure on agency drivers to carry out non-compliant activities
- Drivers do not feel that management are able to deal appropriately with non-compliant agency drivers

6.8.2 Non-GB drivers and vehicles

Several issues relating to non-GB registered drivers and vehicles were raised in the interviews. Most of these included views that foreign drivers and vehicles were perceived to be less likely to comply than GB drivers and those with GB registered vehicles.

“Certainly the enforcement [agencies] have their hands full because of the number of foreign operators that are coming into the UK that are often not compliant.” (Manager, Other, Standard)

“I’ve lost count of the times a foreign haulier pulls into our yard to load, he’s got bits hanging off his truck, he’s obviously been in an accident, he’s not safe to be on the road.” (Manager, Haulage, Standard)

Some interviewees also commented on differences in non-GB standards and safety cultures compared with GB operations, suggesting that non-GB registered vehicle operations are not as strictly managed as in GB.

"But the problem is a real one, the standards in this country are higher than in many parts of Europe, not all parts, but parts of Eastern Europe, in particular." (Traffic Commissioner)

"We've found some very, very good European operators. However, we've also found some others that definitely maintain their vehicles at a totally different level to the UK operators." (CVU representative)

"I've got a lot of Eastern European drivers, so the safety culture can be a little bit different, let's just put it that way. They've obviously got a different view on health and safety to what an English driver would have." (Manager, Haulage, Standard)

"If you have a GB operator's licence, you have to have a maintenance regime and you have to specify that the traffic commissioner can grant and take away your licence. Other European countries do not necessarily have such a robust maintenance system for ensuring continuous compliance, so you will often find their vehicles are less well maintained." (DVSA representative)

A number of interviewees also raised a concern over whether drivers whose first language is not English understand their training at a desirable level.

"Training and language is a big issue." (Client)

However, some of the enforcement and regulatory representatives interviewed suggested that non-GB registered vehicles and operators were becoming less of a concern than they previously had been, and that plans are in place to further improve enforcement for this group.

"DVSA do stop foreign based operators, what I see from DVSA reports, is that the rate of compliance amongst foreign based vehicles used to be significantly worse than UK vehicles, but over the past few years it's actually narrowed down. It might still be slightly worse, but it's not appreciably worse anymore." (Traffic Commissioner)

"If they're GB, they know that we have an awful lot of information on them – they know we can do quite a lot. If you're non-GB, we don't have as much information on them, but we do quite a lot of checking on them at the roadside, so I think non-GB people think we do an awful lot of checking against them. I know we can make changes, that's why we're doing a transformation piece." (DVSA representative)

- Interviewees considered vehicles and drivers registered outside of GB to have a higher likelihood of non-compliance, although some enforcement agencies perceived that this is changing
- Non-GB standards for HGVs and drivers are seen as less strict
- The value of training given to drivers who do not speak English as a first language was a concern

6.9 Reporting non-compliance

The processes in place for reporting non-compliance were explored with regard to how easy or difficult it was to report non-compliant activities, what the barriers to reporting it were and how reports of non-compliance were addressed.

6.9.1 Experiences of reporting non-compliance

Drivers, managers and owners were asked about their experiences of reporting non-compliance within the last year. Just over half of 235 managers/owners stated that they had not had any non-compliance issues reported to them over the last year. The remaining 49% consisted of 31% who stated that someone within their organisation had reported a non-compliance issue, and 18% who stated that someone from outside the organisation had reported an issue.

In terms of reporting non-compliance to others, over half of both drivers and managers/owners stated that they have not seen any non-compliance in London in the last year, as shown in Figure 47. This is somewhat contrary to the findings shown in Figure 32, but may indicate that those operating in the HGV industry distinguish between 'breaking the rules' (e.g. the more frequently observed types of non-compliance such as using a phone while driving, speeding, not wearing a seatbelt, parking illegally) and reportable non-compliance (e.g. the less frequently observed types of non-compliance such as using red diesel, carrying goods illegally, and drivers being asked to work beyond their legal hours limit).

Managers/owners were more likely than drivers to have reported non-compliance, particularly within their own organisation (17% of managers/owners stated that they had done this in the last year, compared with 8% of drivers). A fairly large proportion of both drivers and managers/owners (20% and 18% respectively) had seen non-compliance in another organisation but not reported it, while 9% of drivers and 4% of managers/owners had seen non-compliance in their own organisation but not reported it. The difference in response between drivers and managers/owners was not significant at the 5% level.

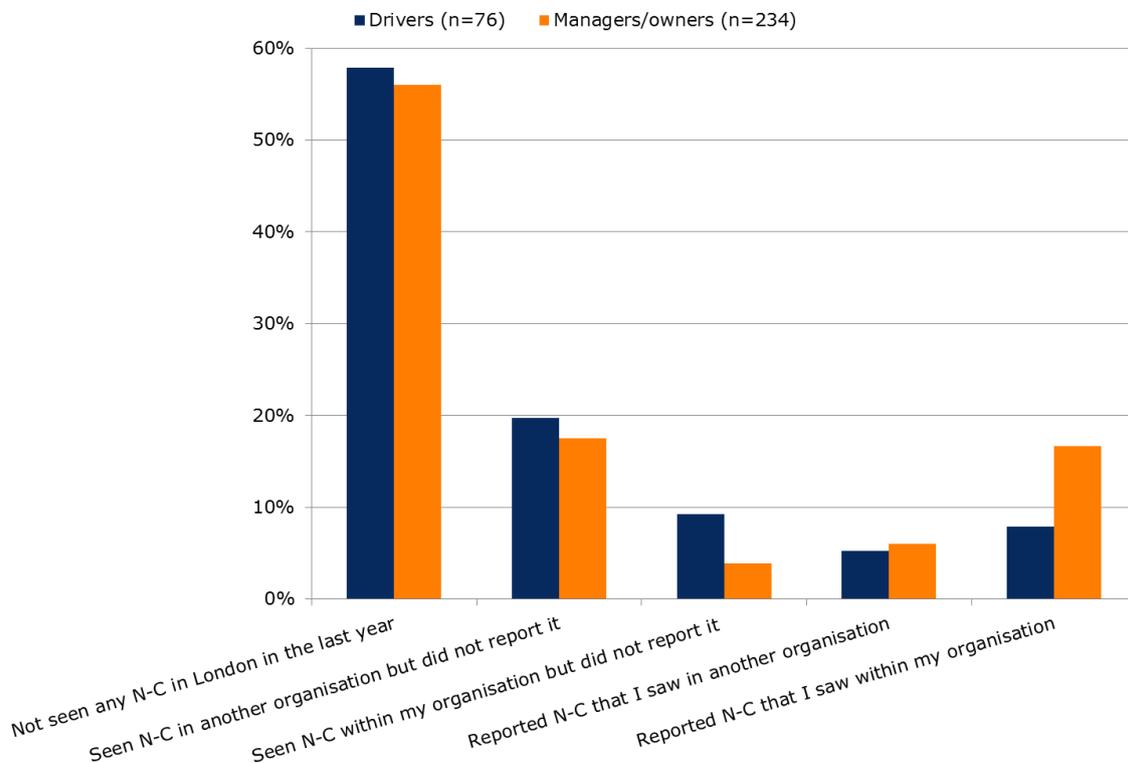


Figure 47. "Have you reported any non-compliance (N-C) issues in London over the last year?"

When describing the likelihood of reporting non-compliance witnessed in an external organisation, interviewees outlined a range of acceptability in terms of what they would or would not report. For example, they suggested that they would be unlikely to report minor driving offences; however, if they saw someone under the influence of alcohol they would take action and report this.

"Would only report major incidences." (Owner, Construction, Standard)

"I don't think I would report, sort of, minor driving offences, you know. I just wouldn't feel that it was my duty to do that." (Driver, Haulage, Standard)

"It's unlikely [that I would report an external organisation's driver], to be honest, it would have to be dire for me to want to say anything. If I saw one fall out the pub, let's say, into a vehicle then I would feel it was my moral duty." (Manager, Construction, Standard)

- Managers/owners were more likely than drivers to have reported non-compliance within the last year
- Half of managers/owners stated that a non-compliance issue had been reported to them in the last year
- Over half of drivers and managers/owners stated that they had not seen any non-compliance in London in the last year
- Around a quarter of drivers and managers/owners had seen non-compliance in the past year, but not reported it
- Not all types of non-compliance are considered to be reportable

6.9.2 Deterrents to reporting non-compliance

Those respondents who had seen but not reported non-compliance in their own or another organisation were asked why they chose not to report the issue. As shown in Figure 48, the most commonly selected reasons for drivers were 'it was none of my business' and 'everyone makes mistakes' (both 32%), while 27% of managers/owners did not report non-compliance because 'I didn't think it was important enough to report' and 22% because 'it was none of my business'.

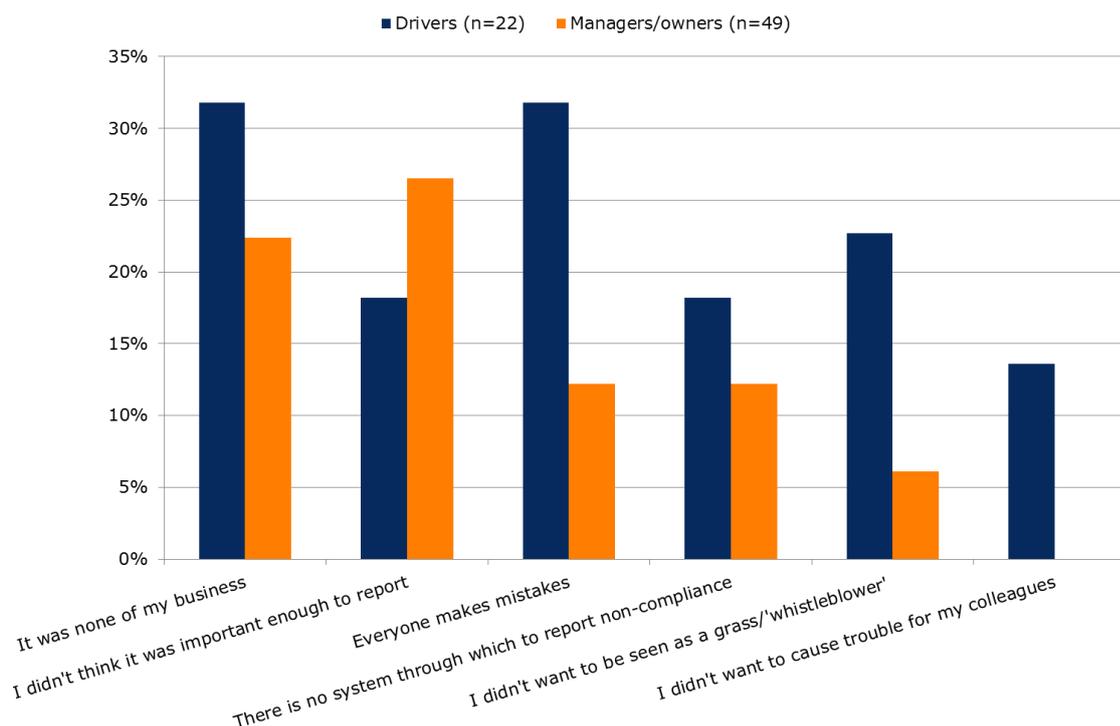


Figure 48. "Why didn't you report the non-compliance issue?"

Other reasons given for not reporting non-compliance included:

- Not knowing how to report non-compliance
 - "How can I report speeding HGVs?"* (Manager, Haulage, Standard)
 - "I have no idea how you would report it."* (Driver, Other, Standard)
 - "With other organisations I have no idea who you would see or what you need to report any issues."* (Driver, Haulage, Standard)
- Not having time to report non-compliance (also found by Jones, 2013)
 - "I see non-compliance all day every day so do not have time to report everything."* (Owner, Construction, Standard)
- Not feeling responsible for reporting non-compliance
 - "I don't see it as my responsibility."* (Driver, Other, Standard)
 - "Too much hassle and it's not my job, DVSA are paid enough to do this."* (Driver, Other, Standard)
- Not believing that reporting non-compliance is worthwhile
 - "I did not believe that the time and effort taken to report an incident would gain any useful result."* (Manager, Construction, Restricted)
 - "Does anything ever get done? So is it worth doing it? Probably not."* (Owner, Haulage, Standard)
- Finding reporting non-compliance too complicated
 - "Too complicated to report."* (Owner, Other, Restricted)
- Not being able to report non-compliance by other vehicles

"Usually other vehicles you see driving around, but you do not have time to pull over and make a note." (Manager, Other, Restricted)

- Dealing with the non-compliant individual directly

"Spoke to the person directly." (Owner, Construction, Standard)

- Concerns over job security

"The newer drivers in the company feel as though they can't report issues." (Manager, Construction, Restricted)

- Reluctance to report those in a higher position

"If you're talking about reporting somebody who's senior to you or even on a par with you, you know, the same, sort of a peer, I think it can be quite difficult." (Manager, Construction, Standard)

- A perceived need for proof before reporting non-compliance, or even before feeling able to deal with it in their own organisation

"In our organisation [reporting is] very easy, the guys pick the phone up. In some of the companies we work for it's very difficult. It really is, you know, we had issues where our guys will say I think this driver is doing this that and the other, well there's not a great deal I can do with it without proof." (Driver, Haulage, Standard)

"Difficult to prove until I put a dash cam in." (Owner, Haulage, Standard)

"Very difficult to gain documented information to pass on to VOSA [DVSA]." (Manager, Other, Standard)

There was also a fear of reprisals for reporting non-compliance, with one respondent stating that *"sadly there is a way of tracing who 'grassed' to the DVSA (Freedom of Information Act etc.) and I wish to keep my windows in my house and don't wish my truck to be burnt out...sorry but that's the truth."* (Driver, Haulage, Standard)

Respondents were also asked whether management acts decisively when a compliance concern has been raised both internally and externally. As shown in Figure 49, there were slightly higher levels of agreement that management acts decisively when a concern is raised externally rather than internally (although this difference was not significant at the 5% level). Managers/owners were significantly more likely than drivers to agree or strongly agree that management acts decisively ($p=0.015$), both for concerns raised internally (88% of managers/owners and 74% of drivers), and externally (91% and 83%).

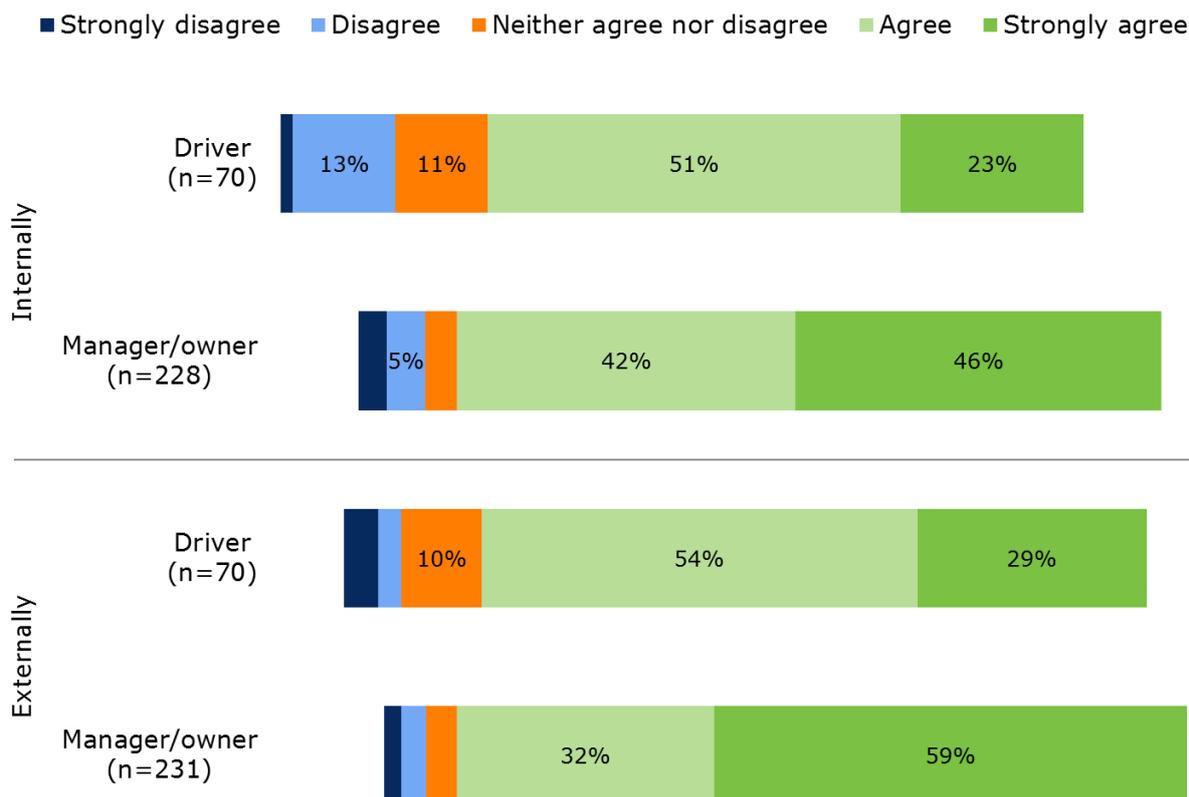


Figure 49. “Management acts decisively when a compliance concern has been raised internally/externally”

- A range of reasons were given for not reporting non-compliance observed in respondents’ own or other organisations
- The perception that it is not their responsibility or none of the individual’s business was a key barrier to reporting, along with not knowing how to make a report, time pressures, the lack of a simple system for reporting, and the belief that there is no reason to report non-compliance
- A further deterrent may be the perception that managers will not act decisively when a compliance concern is raised
- Managers/owners were more likely than drivers to believe that management acts decisively when a compliance concern is raised

6.9.3 Mechanisms for reporting non-compliance

In general, interview respondents suggested that reporting non-compliance was straightforward within their own organisations, but that it became more complicated when it came to reporting non-compliance issues in external organisations.

“It’s very straightforward, we’ve got quite a short communication chain here because we’re a small business and it’s quite an open team, so it’s very easy to report the incidents and then it comes to me and I make sure that the process is followed in terms of documenting and investigating it.” (Owner, Haulage, Standard)

"If I saw another operator [not complying]? I wouldn't know how to [report] it. No, I mean, I suppose I could ring up VOSA or something but I wouldn't consider it." (Manager, Construction, Standard)

It was also felt that internally reported examples of non-compliance would be responded to appropriately and in a timely manner, while there was less certainty about how reports of non-compliance were addressed in external organisations.

"[In my organisation] all of them are acted on appropriately, without fail." (Manager, Construction, Restricted)

"In some of the companies we work for it's very difficult. It really is, you know, we had issues where our guys will say 'I think this driver is doing this that and the other', well there's not a great deal I can do with it without proof, but I can have a word with their manager and things like that. But whether anything is done about it is another matter." (Driver, Haulage, Standard)

Some interviewees suggested that for smaller organisations, which do not necessarily have a dedicated transport manager, resource constraints meant that it may be more difficult (due to the lack of a clear reporting system) or take longer to respond to non-compliance issues.

"In other companies I don't know [how easy it is to report], I think some of the smaller companies that I know are quite hard. And I think if you've got an owner operator, who does he report it to?" (Client)

"They get taken on board but obviously because they are smaller companies and profits are wafer thin, it's sort of 'we'll get around to it', it's a different culture I find. They sort of let things develop whereas with the own account companies, it's 'okay we'll respond to it and we'll see what we can do about this now' sort of thing." (Driver, Construction, Standard).

Survey respondents were asked whether they agreed or disagreed with the statement 'all staff are strongly encouraged to report non-compliance'. In total, 84% agreed or strongly agreed, however managers and owners were significantly more likely than drivers to agree with the statement ($p=0.001$) (see Figure 50).

■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree



Figure 50. “All staff are strongly encouraged to report non-compliance” (excludes ‘don’t know’ responses)

The presence of a system for reporting compliance was investigated; overall 69% of respondents stated that their organisation has a system in place, but again there was a significant difference between manager/owner responses (79% stated there was a system, 4% did not know) and driver responses (46% stated there was a system, 15% did not know) ($p < 0.001$).

- Reporting non-compliance internally was generally believed to be easier than reporting it to an external organisation or agency
- It was generally felt that staff are encouraged to report non-compliance
- Not all organisations have systems in place to report non-compliance; smaller organisations in particular are felt to lack reporting systems
- Managers/owners were more likely than drivers to
 - believe that staff are strongly encouraged to report non-compliance
 - believe that there is a system in place to report non-compliance

6.10 Enforcement, penalties and risk of detection

Interview and survey respondents were asked to share their views on enforcement activities, in terms of how effective they thought they were, how likely they felt detection of non-compliant activities were and what could be done to increase effectiveness.

6.10.1 Effectiveness of current enforcement activities

There were mixed feelings from interviewees when they were asked about the effectiveness of current enforcement activities in terms of tackling non-compliance and about the effectiveness of the deterrents currently in place for non-compliant operators

in London. Some felt that appropriate levels of enforcement relative to the scale of the problem were in place.

"I think they've probably got it about right, you know, you can't be being stopped every five minutes because you've got a job to do. The fact that they target companies who are known to be non-compliant works." (Manager, Construction, Standard)

Others suggested that enforcement activities currently are not effective, stating that they had never been stopped, nor were they aware of anyone else who had been stopped. Furthermore, it was felt that enforcement should be seen as more of a priority area despite the resource constraints faced by enforcement agencies.

"Well, I suppose the fact that I'm not aware of anybody, you know, being caught or checked, then I suppose it's obviously not that visible, and the fact that I wouldn't know where to go to report something." (Driver, Haulage, Standard)

"[Enforcement is] not effective enough. One of my pet hates, or one of my pet comments is there's not enough traffic police out in the road. Obviously every force has had cut backs, but the amount of poor driving I see, the amount of people I see on their phones and speeding in general, just dangerous driving, every day of the week. I just wish there was more enforcement, I don't think it was effective enough. We rely too much now on cameras and not enough on good old fashioned policing." (Manager, Haulage, Standard)

- There were mixed views on the effectiveness of current enforcement
- Resource constraints are a known issue, but there is a desire for increased enforcement activity

6.10.2 Perceived risk of detection

Again, there were mixed views from interviewees about how high their risk of detection by the authorities was. For those who felt that there was a high likelihood of detection, this was thought to be as a result of technologies such as CCTV, Automatic Number Plate Recognition (ANPR) and the presence of enforcement officers.

"I think London's good really, because of the CCTV coverage, and obviously the amount of wardens that are available – outside of London, it's obviously a lot more difficult. Risk of being caught, it's probably greater than anywhere else in the UK, if they're in London." (Manager, Haulage, Standard)

"I think people are aware that you're more likely to get caught in London because of the ANPR cameras and I think having the, the other factor which is relevant is in Central London, well, because in London you've got the, you know, the standard of vehicles, so tatty old vehicles are not allowed to drive into London from outside, so in fact that's something that does make a difference." (Traffic Commissioner)

For those interviewees who thought that detection of non-compliant activities was low, reasons for this included there being limited resources available to undertake enforcement activities, and a sense that enforcement checks would not happen to them (particularly in relation to the sheer volume of HGV traffic in London).

"I would say that the majority think that it'll never happen to me. I think they do have that attitude; certainly drivers tend to think that...these are the ones that know they're doing wrong. You know, it's to the point that it's not going to happen to me because they don't know of other people that have been prosecuted." (Manager, Other, Standard)

"With that many trucks in London and within Greater London certainly there is very little DVSA present looking for trucks who are breaking the law. And it is that complicated and varied that even the Met Police don't tend to bother you because they're never 100% sure." (Driver, Haulage, Standard)

The perception of detection by various enforcement agencies was explored in the survey, with respondents being asked how likely they think drivers in London are to get checked by each agency. As shown in Figure 51, the perceived likelihood of being checked was highest for DVSA (65% of drivers and 68% of managers/owners responded 'quite' or 'very likely') and lowest for the Border Force (17% and 7%). Drivers and managers/owners generally had similar opinions regarding the likelihood of detection by each agency, with the exception of the Industrial HGV Task Force (20% of drivers and 32% of managers/owners responded 'quite' or 'very likely'; almost a quarter of drivers did not know or did not respond to this question, possibly indicating a lack of awareness of the IHTF) and the HMRC Road Fuel Testing Unit (drivers felt at greater risk of being checked when compared with managers/owners – 40% responded 'quite' or 'very likely', compared with 28% of managers/owners).

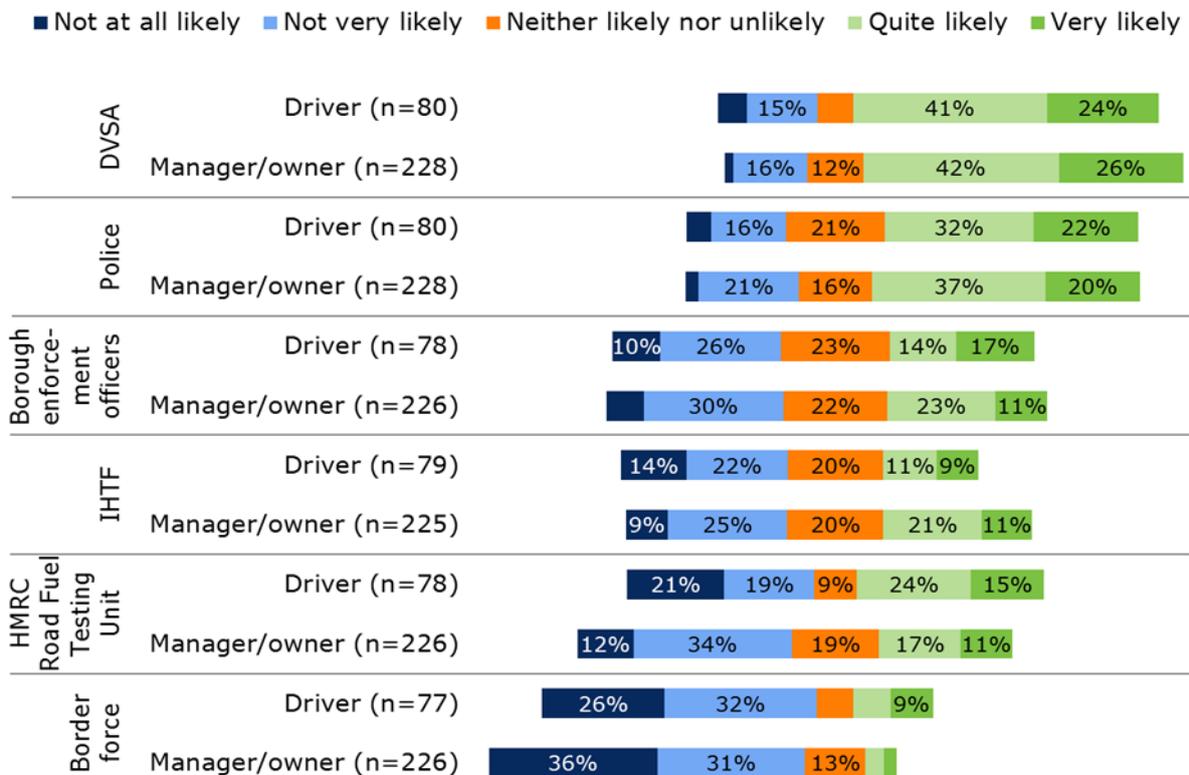


Figure 51. "How likely do you think drivers in London are to get checked by..." (excludes 'don't know' responses)

The perceived ease of 'getting away' with non-compliance was also examined in the survey, with managers, owners and drivers being asked how much they agree that

organisation/operators and drivers can ‘get away with not being compliant’ as shown in Figure 52. Whilst the expectation of being checked was fairly high, especially in relation to the DVSA and police, there was a fairly high proportion of both drivers and managers/owners who agreed or strongly agreed that drivers and organisations can ‘get away’ with non-compliance (in particular, 37% of drivers agreed or strongly agreed with the statement regarding organisation/operators). The small difference between drivers and managers/owners was not significant at the 5% level.

"I suppose most people would probably think they would probably get away with it." (Driver, Construction, Standard)

"I think it's probably changed in the last 12 or 18 months, in London, because there's been, obviously the task force and stuff going on. But I think generally the perception would be that you'd get away with it more often than you'd get caught." (Manager, Construction, Standard)

"The risk of being not allowed to drive when they get caught, is phenomenal but, the risk of getting caught is slim." (Driver, Haulage, Standard)

"I also think there are those out there who know what they should be doing and have this lapse attitude, well, I can get away with that and I can get away with this, and just cheat a little bit." (Manager, Construction, Restricted)

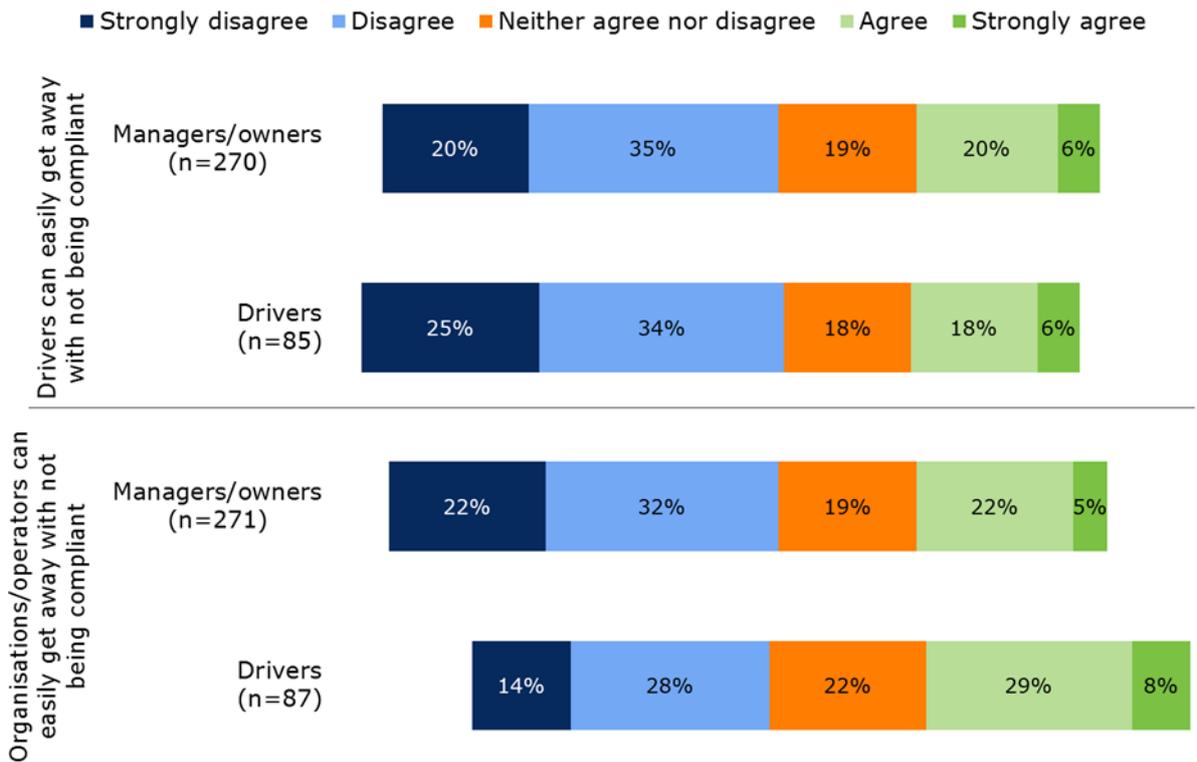


Figure 52. "Organisations/operators and drivers can easily get away with not being compliant"

- There were mixed views on the perceived risk of detection – technology such as ANPR was seen to increase likelihood of detection, while resource constraints were seen to reduce the risk of being checked or detected
- Most drivers and managers/owners perceived their likelihood of being checked by the DVSA to be high
- A considerable proportion of respondents believed that, while the risk of being checked was high, drivers and organisations can 'get away' with non-compliance

6.10.3 Avoidance of enforcement check points

Interview respondents were also asked whether they were aware of enforcement areas that were commonly used and whether avoidance of these areas occurred. Most respondents suggested that they or their colleagues were aware of enforcement 'hot spots' and that avoidance of these areas (and giving warnings to others about them – either by telephone, radio communication or social media) was common. Those who are involved in deliberate and frequent non-compliance may be more likely to make efforts to avoid targeted checks.

"If there is something on their vehicle that is not compliant or if their drivers aren't up to scratch then they are going to avoid these areas and all drivers, sort of, know each other. There is so much social media, etc., out there that, within two minutes of putting a status on there, it's around everybody. So it's very easy to avoid them." (Manager, Construction, Standard)

"I think there are, sadly, operators out there that know, (a) there's a reduced number [of enforcement officers] out there doing the job and, (b) certain times of the day is a good way of avoiding potential stops....they still use the BB radios and the like, we are doing two stop sites in a day as opposed to one because if you're on a static site, very quickly the word gets out and the fall in the traffic suddenly reduces. So they're very effective at that side of it." (CVU representative)

"There could be an issue with the way the targeting is working and are people getting wise to the targeting. And I think there may be some sort of more angles on linking into some of the sort of serious offending and some of the criminality." (DfT representative)

The interview data also suggested that not only non-compliant operators avoid enforcement check-points, some interviewees who described themselves as 'compliant' explained that spot checks took time out of drivers' days, meaning that they would feel under increased pressure to make any subsequent delivery slots.

"If he [a driver] gets stopped at a VOSA [DVSA] site he's going to fail all his deliveries because he's sat there for a good two hours...people do avoid them, yes; it doesn't mean they're non-compliant...the tactic is to avoid getting stopped at the weighbridges, etc. that delays you hours, which then doesn't allow you to do an afternoon's run and then you fail the customers." (Client)

- Avoidance of spot checks does happen and is facilitated by radio communication and social media
- It is not just non-compliant operators who avoid enforcement checkpoints – compliant operators do so to save time

6.10.4 Perception of the outcomes of targeted enforcement checks

Respondents were asked to what extent they agree or disagree that targeted enforcement checks help to improve road safety, generate revenue for the police/government, and effectively encourage compliance. Figure 53 shows the responses from drivers and managers/owners. Drivers tended to agree that targeted checks help to improve road safety, although managers/owners had a more positive attitude towards this (24% of drivers strongly agreed, compared with 45% of managers/owners). They are also deemed to be an effective means of encouraging compliance, although again managers/owners were more likely to agree or strongly agree. Amongst drivers, 70% felt that targeted compliance checks generate revenue for the police or government, compared with just over half of managers/owners. This comparison between drivers and managers/owners was significant at the 5% level (p=0.024).

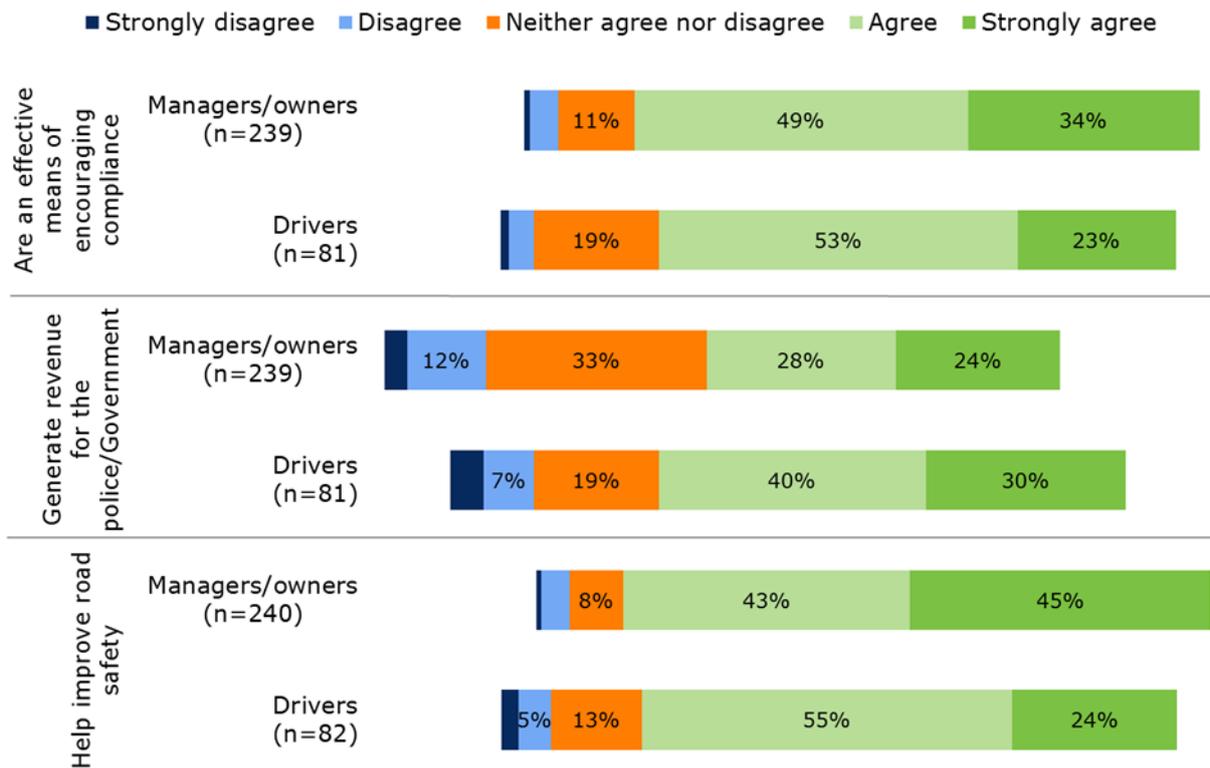


Figure 53. "To what extent do you agree or disagree that targeted compliance checks..."

- There was general agreement that targeted checks improve road safety and encourage compliance
- There was also an overall belief that targeted checks generate revenue for the police or government
- Overall, drivers have less positive attitudes towards the outcomes of targeted compliance checks than managers/owners

6.10.5 Effectiveness of current penalties

In terms of the penalties associated with not abiding by the general rules of the road, drivers typically felt that these were not as effective as they could be. Interviewees suggested that if the penalties were effective, fewer people would be breaking rules related to, for example, mobile phone use and seatbelt wearing.

"I would imagine if penalties were stricter then people would be more compliant on issues like telephones and seatbelt and stuff. I suppose the general attitude is not too much of a deterrent I suppose otherwise there wouldn't be so many people doing it and that's for all motorists whether it is HGV, bus or car or whatever." (Driver, Construction, Standard)

Some respondents, however, thought that the current penalties are substantial and therefore discourage non-compliance; this view was particularly held by smaller organisations who seemed to feel the effects of financial deterrents more deeply than larger organisations.

"You know, it's very hard for us to make a profit and if I'm paying, I don't know, a couple of hundred pounds a week in parking fines, that's a serious amount of money for me. We're only a small business." (Owner, Haulage, Restricted)

On further probing into the types of deterrents, interviewees were asked specifically whether being issued a fixed penalty notice (FPN) or a PG9 had any impact on behaviour in terms of compliance. The general sense was that fixed penalty notices had much less impact than PG9s, and are often factored in to the costs of a job. Fixed penalty notices were seen to be more of an inconvenience than a punishment, while PG9s were taken much more seriously as they are recorded against operator's licences.

"The first response you'll get off a driver if they get a fixed penalty notice tends to be they're more interested in what they've got to pay or they've now got points on their licence, you know. It's not the embarrassment of them being caught doing something they shouldn't have, it's more how much have I got to pay, when have I got to pay it by?" (Manager, Other, Standard)

"I'd like to say that it really does stop people, one would hope that people do take notice of the PG9 or a fixed penalty but I'm not convinced that everybody does take it that seriously." (Driver, Haulage, Standard)

"PG9s have an effect. Fixed penalty notices, no effect. They just take it as part of the risks of running the business...people do the delivery. They ask us and then we have to ask our client if they are going to be happy to pay for it. If the client says no then we don't deliver." (Owner, Haulage, Standard)

Several interviewees reported that they felt that the penalties would be more effective if the consequences were more serious, for example, heavier fines or risk of losing the licence.

"The threat of losing your operator's licence is absolutely life or death for people like me, so it's a very effective deterrent." (Owner, Haulage, Restricted)

There was a suggestion that drivers often bear the brunt of the current penalties system, with transport managers generally being seen as less culpable.

"Many drivers are encouraged into non-compliance by managers and operators. The drivers get stopped and issued FPNs & GFPs yet very rarely does it go any further than that unless there has been wholesale rule breaking." (Driver, Haulage, Standard)

"At the moment, with the fixed penalty system the driver gets caught at the side of the road, he gets done, very, very rarely does a further investigation take place. So, everybody goes, oh well, that's down to the driver and we'll let it carry on." (Driver, Haulage, Standard)

Views were almost unanimous that having to present to the Traffic Commissioners was seen as the ultimate deterrent.

"In my opinion it [non-compliance] should go straight to the Traffic Commissioner. [In a previous role], a driver was caught on a mobile phone whilst driving a commercial vehicle. He was referred to the Traffic Commissioner; he had a two week suspension. To my knowledge he learned his lesson very quick because, regardless of any fine or points, he suddenly realised he was out of work, in essence, for two weeks because he can't work he can't get paid." (Manager, Other, Standard)

"I think if we could get a few more drivers in front of conduct hearings rather than happily paying a fixed penalty, or taking a prohibition notice [it would be a more effective deterrent]. But actually, when they come into the inquiry room, it looks like a court room, it brings home to them how serious matters are." (Traffic Commissioner)

"One thing a transport company does not need is a PG9, obviously, because you'd be up in front of the Traffic Commissioner." (Manager, Construction, Standard)

"They are powerful people, they can kill your business like that...they [hearings] are fairly intimidating places." (Manager, Haulage, Standard)

It was suggested that there is a lack of communication or publicity relating to penalties for non-compliance (see also Section 8.1.6). More communication about penalties provided to and within organisations would increase awareness of the potential for drivers and operators to be exposed to severe penalties. The need for awareness about changes to penalties was also emphasised.

"I think they [current deterrents] are good, but they do lack publicity, so to speak." (Driver, Other, Restricted)

"Recently there was a guy banned for use of a mobile phone. He got his licence taken off him by a traffic commissioner. So we publish that on the board and say look guys, we're not just saying it, it really is real." (Owner, Haulage, Standard)

"There is no need for increased penalties but there is need for better communication of the penalties that drivers and operators are exposed to. For example the maximum fine level for overloading a lorry or using a vehicle where a driver fails to use the tachograph correctly (including incorrect mode setting which is perceived as a minor offence) has just increased from £5000 to an unlimited fine in the magistrates' court. This is true even though the prosecution would not be required to prove against an operator that they had any knowledge of the...error, which might be due to a customer or driver error in spite of good underlying systems and processes." (Transport solicitor)

Some respondents expressed the belief that targeted enforcement, particularly by DVSA, targets those who are compliant (e.g. because non-compliant operators with no licence would not have an OCRS rating, and so would not be checked) and issue fines and prohibitions in order to achieve targets. If this is the case, the effectiveness of targeted enforcement checks will be compromised.

"It seems to me that the legitimate operators are the ones more likely to be stopped. It's those that are operating without a valid licence that get away with it." (Owner, Other, Standard)

"There's a lack of trust by some operators in the DVSA. This lack of trust is a consequence of the fact that these operators feel that a number DVSA officers at the roadside are just looking to issue another penalty, and are not motivated to educate and assist. I can say that there are good anecdotal examples of prohibitions and fixed penalties which would support this view. Logically the DVSA should be motivated and targeted to reduce the number of prohibitions and fixed penalties over time through working with the industry to improve standards. They should see the issue of prohibitions or fixed penalties as a whole as a mark against the DVSA as well as against the individual operator." (Transport solicitor)

- There were mixed views on the effectiveness of current enforcement and deterrents
- PG9s are seen as more of a deterrent than fixed penalty notices
- Increased publicity around the use of penalties is needed
- Presenting in front of the Traffic Commissioner is seen as the ultimate deterrent

6.11 Training and guidance

Both survey and interview respondents were asked about training in terms of the way it is structured, its importance and usefulness. They were also asked to describe the sorts of information and guidance related to compliance they sought and where they found it.

6.11.1 CPC training

The topic of CPC training was covered in the survey by asking respondents who pays for the driver CPC training in their organisation, and whether drivers complete it in their own time or during work time. In 75% of cases,³⁴ the organisation paid for the training, and in 20% the driver paid. Some respondents reported a mixture on a case-by-case basis.

³⁴ n=304

Overall, around half of managers/owners reported that drivers complete CPC training in work time, with 27% completing it in their own time and 23% completing it in both their own time and in work time. However, considering standard and restricted licences separately (see Figure 54), managers/owners belonging to an organisation with a restricted operator’s licence were significantly more likely to report drivers completing CPC training during work time (73%, compared to 43% of respondents with a standard licence), and less likely to report training being completed in drivers’ own time (9%, compared to 32%) ($p=0.001$). When controlling for sector a similar difference was found ($p=0.018$). A similar but smaller difference was found for driver responses. This finding (although based on a small sample of drivers) seems to run counter to the perceived view that restricted operator licence holders are less likely to engage with compliance and regulations.

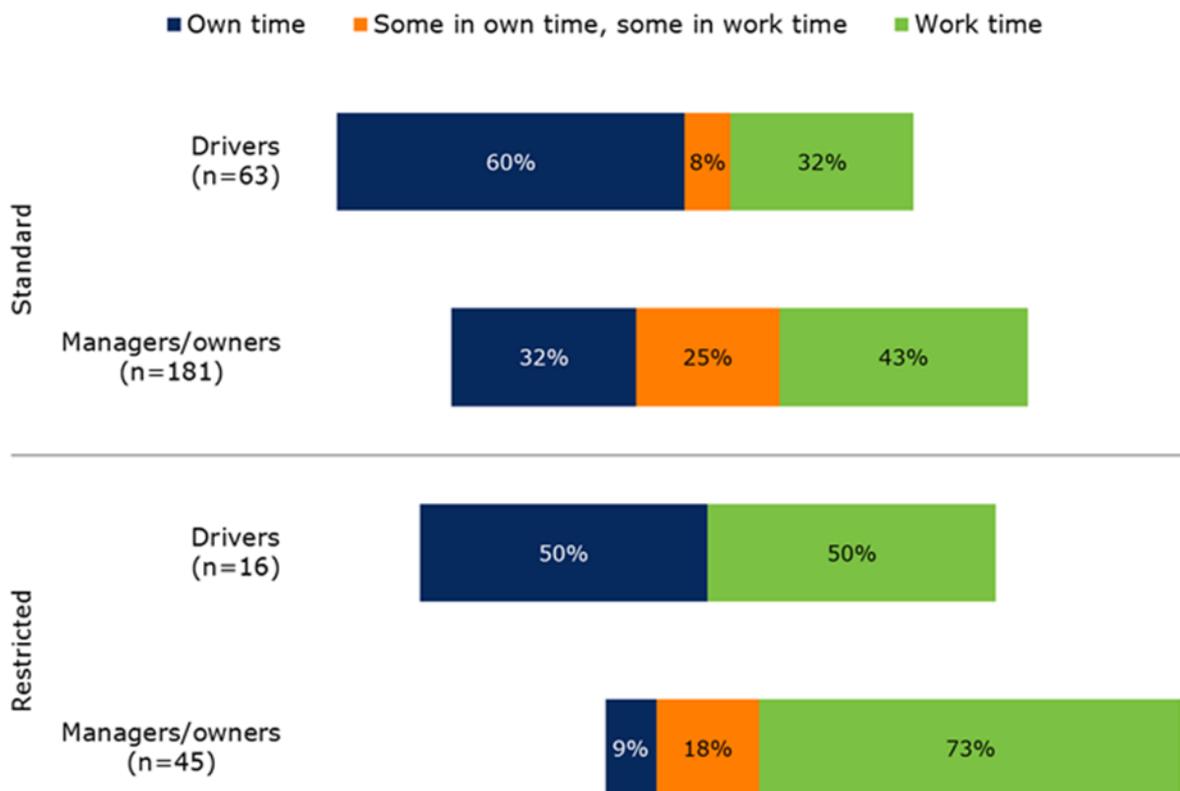


Figure 54. “Did you complete the CPC training in your own time?”

Interviewees were also asked to describe who was responsible for keeping drivers’ training up to date. Views about where this responsibility lay varied, particularly for different sized organisations, but typically, the transport manager was seen to be responsible for maintaining training records. For smaller organisations, it was seen as being likely to be the owners’ or directors’ responsibility. However, there was also an acknowledgement that drivers should take more responsibility or interest in their training.

The majority of interviewees described CPC training as being highly important, with most interviewees agreeing that drivers learn best through practical training.

“[Training is] absolutely paramount. Your drivers are the people who are out there representing your business.” (Owner, Haulage, Standard)

"It needs to be practical training; drivers don't want to sit in an office for a day, by their very nature." (Owner, Haulage, Standard)

The FORS Safe Urban Driving (SUD) course was also repeatedly mentioned as a useful piece of driver training, especially as it incorporates practical elements.

"SUD training, safe urban driving...it is fantastic because they get to know what it feels like to be a vulnerable road user." (Manager, Construction, Standard)

6.11.1.1 Perceived shortcomings of the current CPC system

Although some respondents thought that the driver CPC training was useful, others thought that there was room for improvement. The lack of any formal assessment was frequently described as being the most negative aspect of the current system.

"There is not test, no exams, you just have to be in the classroom, you can fall asleep." (Owner, Other, Standard)

"DVSA and JAUP to have more robust ways for checking for inferior and non-existent training of Driver CPC. I have personally experienced drivers asking where they can pay for DCPC training but not have to attend!" (Manager, Construction, Standard)

"The Drivers' CPC program has become a joke; apparently introduced as a bizarre addendum to an entirely functional licensing process, and then watered down once it became clear that many drivers would be unable to complete a written exam: it is now an expensive and burdensome boondoggle." (Manager, Other, Standard)

Other feedback that emerged from the interview data was a feeling the structure of the training scheme was quite loose and may result in different interpretations and abuse. For example, respondents described how people are able to repeat specific course modules multiple times in order to achieve their training hours.

"I went on five courses and three of those courses I sat the same course for three days, just in order to satisfy that requirement. Perfectly legal, perfectly legitimate, I did my training, but out of those 35 hours, 21 hours were on the same course, what's the point in that?" (Owner, Haulage, Standard)

Some interviewees also suggested that language barriers may exist for foreign registered drivers which may hinder their ability to be trained appropriately.

"Training and language is a big issue, a lot of companies are now driving non-UK nationals." (Client)

"With the CPC of course, the way it is now, there's no test. So you can be from a foreign country with no understanding of the English language. You can sleep through the seven hours on the training. And you will still get your training attendance points." (Owner, Construction, Standard)

It was also mentioned that due to the five year CPC cycle, some managers or owners do not tend to train their staff until as late as possible in the process. It was suggested that this may be due to managers not wanting to invest in training a driver in case they leave the organisation, taking their knowledge with them.

"...what some operators do is, they leave it until the last year, and then they shove them all through courses. And then they're not really interested in the quality of the course. They're just interested in obtaining the tick at the end of

the day in the box...it's directly a by-product of the fact that they lose so many drivers that they don't want to make them even more attractive to a competitor by training them up...and one thing they can do to retain them is not give them the CPC." (Transport solicitor)

A number of respondents suggested that the CPC training requires modifications to its structure to ensure that people attend and understand a range of courses relevant to their job role.

"Maybe better education or training or be forced to go on appropriate training courses." (Driver, Construction, Standard)

6.11.1.2 CPC training as a means of improving knowledge about compliance

In terms of knowledge of how to be compliant, interviewees felt that knowledge of how to be compliant was generally good, suggesting that the training involved in gaining a driver or transport manager CPC fully equips people with the knowledge required to meet regulations.

"Yes, that was covered quite thoroughly in the CPC training, so I would think that most people involved in the industry are now fully aware of that." (Driver, Haulage, Standard)

- More managers/owners belonging to an organisation with a restricted operator's licence reported that drivers complete their CPC training during work time than those belonging to an organisation with a standard licence
- Typically, the transport manager was seen to be responsible for maintaining training records
- CPC training was described as highly important, with a preference expressed for practical training elements
- Improvements to the CPC training included:
 - formal assessments
 - a more rigid structure to ensure all modules are covered
 - consideration of language barrier issues
- CPC training was seen as equipping people with the knowledge needed to meet compliance regulations

6.11.2 Sources of information and guidance

Many interviewees suggested that there is a sufficient amount of information and guidance available to equip operators and drivers with the knowledge about how to be compliant and that this information is easily accessible either online or through newsletters and pamphlets.

"You can go on the websites and there's lots of leaflets and pamphlets you can download on safe practice and best practices that you can download and read through. You've got Transport Friend online; they're pretty helpful, VOSA site, that's very helpful. You can download lots of information off there if you need to." (Owner, Haulage, Standard)

This aligns with the majority of survey respondents (82%) who stated that they would know where to look if they needed information or advice on a compliance-related issue. However, considering drivers and managers/owners separately revealed that drivers were less likely to know where to find information or advice, with 48% of the 80 drivers compared with 95% of the 237 managers/owners stating that they would know where to look.

When asked to describe where they would seek information or advice, the majority of responses fell into the categories shown in Table 23.

Table 23. Sources of information mentioned by survey respondents

	Managers/owners	Drivers
FTA	✓	✓
RHA	✓	✓
DVSA	✓	✓
TfL	✓	✓
Colleagues / transport manager	✓	✓
Internet	✓	✓
Internal compliance manager / specialist	✓	
FORS	✓	
London Boroughs	✓	
Met Police	✓	
CILT	✓	
CLOCS	✓	
Online forums	✓	
Lowe's handbook	✓	
Croner	✓	
Federation of Small Businesses	✓	
London Lorry Route Approver	✓	
Trade Press	✓	
gov.uk	✓	
Greater London Freight Council	✓	
DVLA		✓
CPC book		✓
London Lorry Control		✓

Survey respondents were then provided with a number of sources of information and guidance, and asked whether they had used each and whether they would consider using them again or in the future to find information or advice on a compliance-related issue. As shown in Figure 55, managers/owners were more likely than drivers to have previously used each of the methods.

The most frequently used means of finding information overall was an internet search. Just under 90% of managers/owners stated that they have previously used an internet search to find information or advice, and only 5% said that they would not consider this. The majority of managers/owners (88%) also stated that they had used the TfL website or other TfL advice. Asking a manager or colleague/other contact were also frequently used means of gaining information (73% and 81% of managers/owners had done this, respectively).

Among drivers, the most frequently used method of finding information or advice was to ask a manager within their organisation (74% had done this; the same proportion of managers/owners had also done this), followed by an internet search and asking a colleague or other contact in the industry.

The source of information that is least likely to be used is Trade Unions (54% of drivers and 68% of managers/owners would not consider this), followed by the trade press (22% of drivers and 11% of managers/owners would not consider this).

Thirteen percent of drivers stated that they would either not consider asking a manager in their organisation for compliance-related information, or have done this in the past but would not do so again.

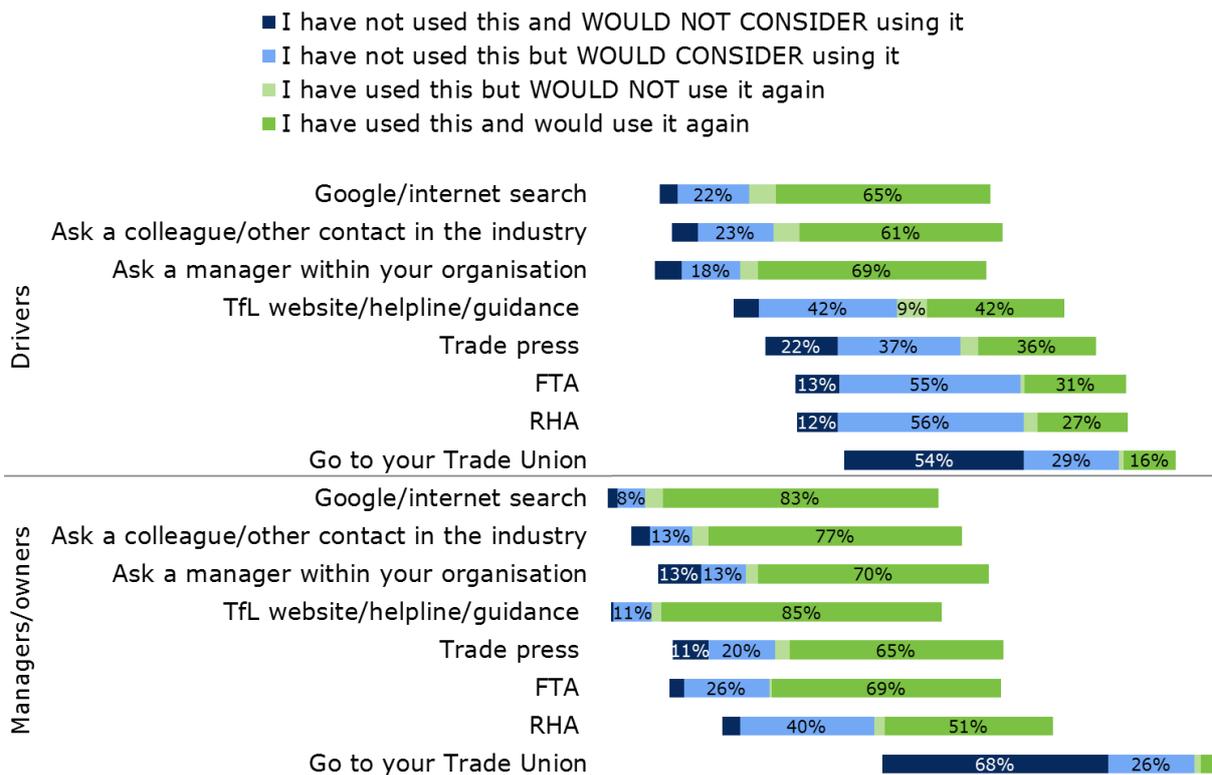


Figure 55. Sources of guidance used or considered (driver n ranged from 73-77, manager/owner n ranged from 209-235)

- Many respondents thought that there was sufficient information and guidance available online or through information materials
- There was a sense that drivers were less likely to know where to find information than managers or owners
- Information sources described by both managers/owners and drivers included the FTA, RHA, the DVSA and TfL
- Other ways of obtaining information included general internet searches and asking appropriate people within the organisation

6.12 Client perceptions of non-compliance

Clients completed a shortened version of the survey. This section summarises the findings regarding client involvement in and perceptions of compliance and non-compliance.

6.12.1 Client attitudes to compliance

Figure 37 showed that the clients responding to the survey had poor levels of knowledge of the rules and regulations associated with operating HGVs in London; therefore the low incidence of compliance checks is not surprising. There was an indication that clients either assume compliance, or are not aware of what to check at tender stage if they wanted to ensure that their contracts are with fully compliant operators:

"At beginning of contract it [compliance] should be a given." (Client)

"[Compliance probably checked by] head office but not sure." (Client)

"I do not think that many of our customers would understand what a fully compliant vehicle is." (Manager, Haulage, Standard)

As shown in Figure 33, client respondents appeared unconcerned about HGV regulatory non-compliance, with over half saying that it is mostly or always OK. When asked under what circumstances non-compliance may be acceptable, respondents mentioned emergency situations, but principally parking and loading/unloading:

"Parking is a real issue if loading bay is full. They probably shouldn't do it but we need the stock." (Client)

"Parking [non-compliance is OK] but not anything that may endanger persons." (Client)

The clients responding to the survey were largely from the retail sector, and there was a prevailing opinion that the compliance of HGVs that deliver to their premises is not their concern or that non-compliance with the rules is a necessity in order to make the delivery. Comments to this effect were common, e.g.:

"Loading and unloading – the transport company is responsible." (Client)

"I only want them to deliver my goods. How they do it is up to them." (Client)

"Responsibility for loading and unloading is with the supplier not the receiver of goods. Red Route is a problem, [HGVs] struggle to park in the loading bays." (Client)

"Parking and loading restrictions are not our place. Drivers are in an awkward position in London." (Client)

"Their primary concern is to get their product intact, on time, to a location, or conversely, collected on time, efficiently, and delivered to a location. They have really no interest in how that's done." (Transport solicitor)

This is supported by the survey finding (see Figure 35) that clients do not perceive compliance with delivery requirements to be important, and also by interviewee responses:

"Clients don't care how it gets there as long as it gets there. To give an example I was on the way to a shop the other day, I was going to run out of time because I was stuck in traffic so I messaged the office and they said 'oh well if they're still open go there', and I said no but there are compliance rules that are used with this so I'm not going there because of local bylaws in terms of what we've agreed with the council as far as I know. He put somebody else on the phone, who said, yeah it's okay to go there, they're open until nine o'clock." (Driver, Other, Standard)

A concern expressed by drivers and managers was that if they are stopped by an enforcement agency or are otherwise delayed, there is a knock-on effect for the client (if they are travelling to a client at the time of being stopped).

"Sometimes these big distribution depots will say 'sorry we're not going to unload you today you've missed your slot' and that operator then has a loaded vehicle and he is stuck with somebody's load on and that can create all sorts of problems especially for the smaller operators. So booked delivery times I think can cause problems." (Driver, Construction, Standard)

Clients were asked about this issue, and there were mixed responses as to whether there would not be any reprisal for delivery slots being missed as a result of delays caused by this.

[And so what would happen if a driver missed his delivery slot or was late because they were stopped at the roadside by one of these organisations?]
"Nothing on our side. If they...they do have a time slot to try and keep to but we're quite accommodating, as long as they pass their FORS compliance nothing will happen here." (Client)

[Would being stopped for a roadside check have any knock on to the haulier?]
"Probably, yes...more likely you're going to have to pay them a bit of standing time. Or the perception that your company is not very efficient at delivering when you said you would, which is the longer term issue." (Client)

Clients were asked whether they ensure that their contractors operate legally in London at the contract stage and periodically over the life of the project by obtaining proof of a valid operator's licence, vehicle roadworthiness, driver CPC qualifications, and other driver training. As shown in Figure 56, the majority of clients did not check each of the aspects of compliance, particularly at tender stage.

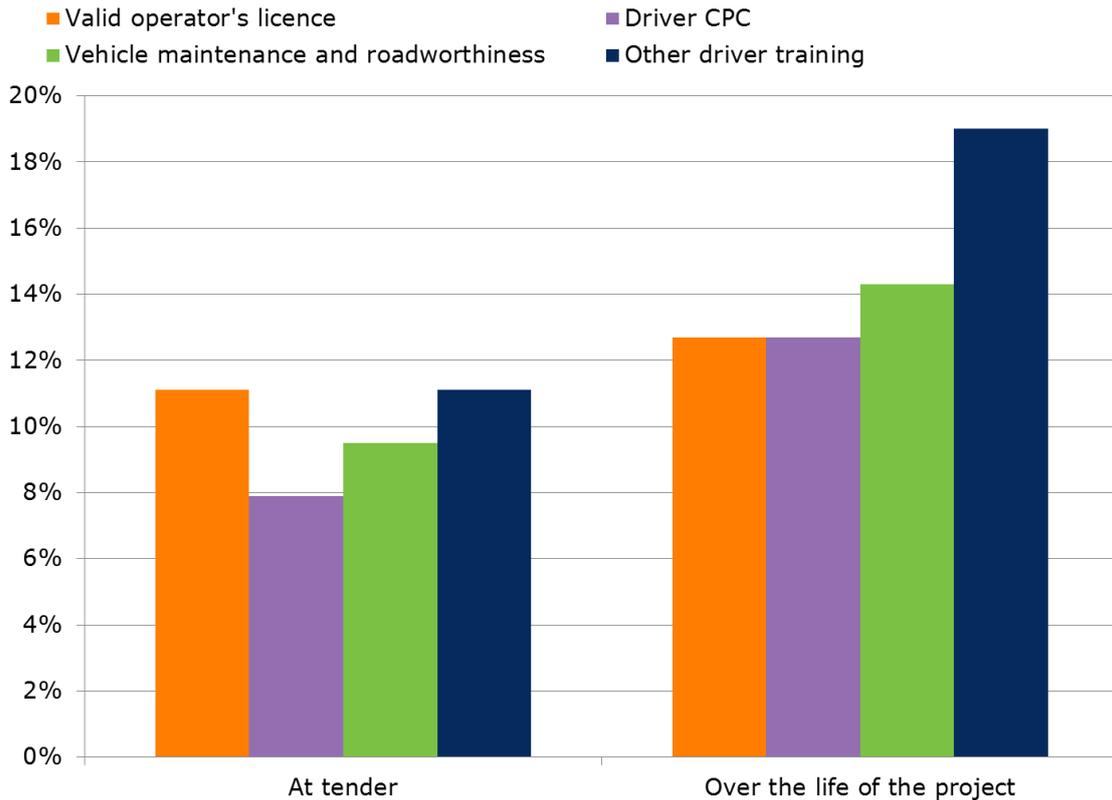


Figure 56. “How do you ensure that your contractors operate legally in London, both at contract stage and over the life of the project? By obtaining...” (n=63)

- Clients responding to the survey had poor knowledge of rules and regulations relating to HGV operations in London, and did not tend to carry out compliance-related checks
- Non-compliance is seen as acceptable by many clients, particularly in relation to deliveries
- Clients may penalise HGV operators for missing a delivery slot

6.12.2 The role of clients in relation to compliance

When drivers, managers and owners were asked about the role that clients play in relation to improving compliance, the response was varied. Some interviewees felt clients encourage compliance through requiring certain safety and compliance standards such as FORS accreditation, and that clients are in a key position to encourage and increase compliance.

“I think improvements are being client-driven.” (Manager, Other, Restricted)

“The contractor will only do what the client asks.” (Client)

“The clients definitely have a role to play, even if it’s just feeding back to me, you know, and saying, I’ve seen your driver do this.” (Manager, Haulage, Standard)

“If they have a certain standard that they demand, if their standards exceed your standards, then you have to raise your standards to their standards.” (Manager, Haulage, Restricted)

Others felt that clients played an indirect role in non-compliance, for example by setting delivery slots and penalising drivers for not meeting them.

"The biggest pressure they [clients] put on drivers is what happens at the point of delivery, when a driver can be expected to be at a location, when as a result of events completely out of his or her control, he or she cannot get to that location on time. There's a financial penalty for the operator as a result of that, usually, and, furthermore, when they do get there, they are at the back of the queue, which puts immediate pressures on that driver's ability to take his or her daily rest. And that's...one of the most common forms of falsification of tachograph records, is because of the inability to start the daily rest when they want to, because they've got to deliver out of the time when they want to do it. And that's pressure entirely caused by the customer." (Transport solicitor)

"Yes [clients do have a role] because the client who pays for the haulage, they want it to be as cheap as possible, so if they're encouraging people to undercut other people, they're encouraging this level of non-compliance within the industry. You also have RDCs [regional distribution centres] who have such short time slots for vehicles – if a vehicle gets held up on the road network and they need to stop for their break, but they'd miss they're slot, they're going to keep going because the consequences of missing the slots at RDCs are really serious." (DVSA representative)

Stringent delivery slots may also have an effect on other elements of driver behaviour.

"Drivers' hours compliance, and, to an extent, driver behaviour, i.e. speeding, cutting corners, pressure on the driver...that's where the customer feeds in." (Transport solicitor)

Operators may also feel that they are compelled to be non-compliant in order to gain work, and so clients should be more mindful of the potential implications of procuring the services of less compliant operators.

"Clients, in fact, want something delivered at a certain time in a certain time window, which actually can be, for drivers' hours, impossible, and it needs a strong operator to say, no, we can't do that, and won't do that. But the client will often go to someone else who will break the rules, and sometimes the only way to comply with the client is to break the law, and that's why...the clients who use HGV services do have a role to play in improving compliance, generally." (Traffic Commissioner)

In some cases clients may be seen as making unreasonable demands in terms of compliance, and may need to reconsider their approach to ensure it is balanced and sensible.

"The health and safety regulations at some clients' premises are just absolutely ludicrous. They're taking away the whole common sense factor...I go to some places where they insist on safety goggles and a hard hat...and the driver will be refused entry if he hasn't got a hard hat...it just makes life very difficult, I think sometimes the rules and regulations, the clients definitely have a role to play, even if it's just feeding back to me, you know, and saying, I've seen your driver do this." (Manager, Haulage, Standard)

Because HGV operators rely on clients to keep their business in operation, it is seen as imperative that they meet client demands, even at the expense of maintaining compliance.

"If you've got a big contract worth a lot of money, you might try and cut corners to ensure you keep your client happy." (Manager, Other, Standard)

"It's just basically a thing you've got to put up with inside London now, you know, we have demands from our customers to do the deliveries and, you know, we don't do the deliveries we don't rake in the pounds to keep the business going." (Manager, Haulage, Standard)

Clients' views on their own role in compliance was explored by asking their view on whether clients who contract HGV operators have a role to play in ensuring that operators are fully compliant. Of 63 responses, 38% responded positively, and a further 19% stated that they did not know. Use of fully compliant contractors can be used as a marketing tool, for example Crossrail. One client described what clients could do to ensure they are procuring the services of fully compliant HGVs:

"They need to ask the right questions if they really mean business. Ask for operator's licence, FORS certificate, HSE accident book. Do that every few months as regular reviews and also do some background financial checks." (Client)

Larger clients, for example construction projects, may have multiple levels of contractors. The client may have contractual requirements for contractors, but one such interviewee described how they only have direct control over the top-level contractor.

"As the client we set in the original contract our requirements regarding many things but including vehicles, safety standards, vehicle movements and the standard we expect them to adhere to. They are expected to then flow the requirements of their contract down to any of their subcontractors...as far as we're concerned as a client, it is always the contractor's responsibility to make their supply chain compliant with the whole contract, so we don't deal directly with the haulier." (Client)

Whilst construction clients are often seen as having the most influence over HGV compliance (because they can, for example, refuse entry onto the construction site to non-compliant vehicles), it was established that clients in other sectors also have a role to play in enabling compliance.

"It's a customer driven business, if the customer demands that, you know, for a competitive advantage to get a particular product to a particular location by a particular time for particular cost then at the end of the day they set the agenda, because everyone at the end the day has to fall in line with the customer's request or try to. And that's pretty much where the problem starts and finishes." (Manager, Other, Standard)

- Clients generally do not check the compliance of the HGV services they use, or are not aware of how to check it
- Client requirements and demands may inadvertently cause non-compliance
- Clients and other stakeholders believe that clients should play a role in improving HGV regulatory compliance
- Clients with contractual requirements in place to promote compliance may only have influence over the compliance of top tier contractors

7 Findings

The current project addressed the following research objectives:

1. Determine the levels of non-compliance of UK and non-UK based HGVs, drivers and operators within London.
2. Analyse and draw meaningful conclusions from available roadside enforcement data on HGV operations in London.
3. Establish which sectors of the HGV industry are over-represented in non-compliant HGV operations, with particular attention paid to restricted operator licence holders.
4. Define specific reasons and motivations for regulatory non-compliance of HGV drivers and operators in London.
5. Make recommendations based on sound findings that should be adopted by organisations such as TfL, DfT, DVSA, Police, Traffic Commissioners and the road haulage industry, with the objective of increasing the levels of regulatory compliance within HGV operations in London.

In this section, we discuss the key findings related to objectives 3, 4 and 5, taking into account all of the data gathered in the project. Objective 1 will be principally addressed by the non-targeted enforcement work; this may also go some way to addressing objective 3. Objective 2 was addressed by the targeted data analysis task (see Section 4).

Quotes are provided in this section; some of these are repeated from previous sections but are included here to reinforce the findings.

It should be noted that although this project took a broad approach to the area, a definitive statement as to the quantitative differences between different sectors of the HGV industry is not always possible³⁵. There is great variability in the types of operations in which HGVs are involved, and this should be borne in mind when considering the findings and recommendations. The outputs of the project nonetheless represent opportunities to broadly improve regulatory compliance of HGVs in London and across the UK.

7.1 Finding 1: Current levels of non-compliance – even with fundamental laws – are unacceptably high

Speeding, using a handheld device, and not wearing a seatbelt were reported as being very common (in terms of occurring at least some of the time), with only around 10% of respondents reporting that they never see or hear of others carrying out these behaviours when driving an HGV. Although rates of non-compliance with road-law-related behaviours in the targeted stop data were very low (at around 1.5%), one might expect a professional industry to aspire to full compliance with such fundamental rules. High levels of non-compliance with other general and HGV-specific rules and regulations were also reported.

³⁵ Note that the failure to achieve the desired survey response rate, despite best efforts, may indicate a lack of inclination and/or time to contribute knowledge and expertise to research.

The findings as a whole suggest that the culture in the industry, and the ability of drivers and managers to deal with non-compliance, may require some improvement.

"I see the drivers come in, I see them on the phone, I see them smoking, I see them speeding through the yard. I am out in the yard several times a day checking for non-compliance." (Manager, Haulage, Standard)

"How can I be responsible for my driver committing a moving traffic offence? There is only so much you can hold me culpable for, I can train and educate and put my driver through the CPC and everything else, but if they decide to ignore a traffic signal, then why am I held responsible?" (Manager, Construction, Standard)

"I don't think lorry drivers are any different to car drivers in that respect and everybody just seems to almost turn a blind eye to those [mobile phone] laws...the argument with regard to that and smoking in vehicles and all that sort of thing, is how do you enforce it? Seatbelts, how do you enforce it, you know. Unless you've actually got people out on the street stopping vehicles, doing stop and checks, that sort of thing, none of those things can be enforced." (Owner, Haulage, Standard)

There are a number of motivations for non-compliance with all types of rules and regulations, including (but not limited to) a lack of understanding of how to comply, a feeling that non-compliance is a necessity in order to complete the job, and the perception that penalties are not severe enough.

"Definitely ignorance, people don't realise they're not complying." (Manager, Other, Restricted)

"Because of so many restrictions everywhere you have a choice of which restriction you're going to break. You have to use common sense which is going to be the lesser penalty if you're caught." (Driver, Construction, Standard)

"PG9s have an effect. Fixed penalty notices, no effect." (Owner, Haulage, Standard)

"You've only got to look at driving without a seatbelt as non-compliance. If a driver gets caught with no seatbelt on, he possibly will get points and a fine. In my opinion what should happen is you shouldn't even get to that point it, should go straight to the Traffic Commissioner. The same with mobile phones." (Manager, Other, Standard)

7.2 Finding 2: The term 'non-compliance' holds different meanings for different people

There are a number of laws, rules and regulations which HGV drivers and operators need to abide by in order to be fully compliant in London:

- Driver level
 - General driving rules (e.g. speed compliance, seatbelt wearing, mobile phone use)
 - HGV-specific rules and regulations (e.g. drivers' hours, tachograph rules, training, licensing)

- London-specific rules and regulations (e.g. London Lorry Control Scheme, Low Emissions Zone, congestion charging)
- London-specific/client-specific contractual requirements (e.g. Crossrail, FORS)
- Transport manager level
 - Operator licence requirements, including CPC training for standard licence holders
 - Driver rules (e.g. ensuring drivers are legal, training drivers, checking tachograph)
 - Vehicle maintenance
 - Journey planning
 - Keeping records and notifying changes to the Traffic Commissioner

It was found that the term 'non-compliance' means different things to different people. Typically, when talking about non-compliance, drivers tended to focus on general and HGV-specific rules and regulations (e.g. drivers' hours and tachograph rules). The managers and owners interviewed tended to focus on operator licence requirements, driver rules and vehicle maintenance when they were asked about non-compliant activities. The clients interviewed tended to interpret non-compliance as being in relation to deliveries or contractual requirements such as those specified by FORS or Crossrail.

7.3 Finding 3: Views held by drivers and management differ in many ways, particularly: (a) perceived levels of non-compliance (compared with management, drivers report lower levels) and (b) self-reported knowledge and attitudes towards non-compliance

Whilst very few significant differences were found in survey responses between sectors and licence types³⁶, many differences were found between roles (comparing drivers to managers/owners and, where possible, clients). Significant differences were found relating to:

- Reported levels of different types of non-compliance
 - Managers/owners were more likely than drivers to report their own and (in particular) other organisations committing most types of non-compliance
- Attitudes to non-compliance

³⁶ The question may be asked of whether this reflects a genuine lack of differences between the behaviour of holders of different licence types for the majority of operators; it is possible for example that the perception that restricted licence holders are less likely to be compliant is being driven by a small minority of such licence holders who are indeed less compliant (but who also are not the kinds of individuals or organisations to respond to surveys). Further research focused specifically on restricted operator licence holders may be needed to understand this more fully, although see Finding 4.

- Managers/owners were more likely than drivers to see non-compliance as acceptable (although there were no differences in its perceived importance)
- Drivers were more likely than managers/owners to think that the job can be done safely without following all rules and procedures
- Knowledge of compliance
 - Managers/owners had better self-reported knowledge than drivers of the rules and regulations relating to HGV roadworthiness and operating and driving HGVs in London
 - Managers/owners had better self-reported knowledge than drivers of the legal consequences of non-compliance for both themselves and their employer

7.4 Finding 4: Operators with restricted licences are perceived to be, and appear to be, more likely to be non-compliant

There was a strong belief amongst interviewees that those with a restricted operator's licence are more likely to be non-compliant, either through lack of knowledge or because HGVs do not represent the main purpose of their business.

"I think an awful lot of restricted operators think that it is literally just a case of that you need to know some basics about drivers' hours and actually the driver should know that...you'll probably find a high proportion of people that are doing things wrong, it's through lack of education and lack of knowledge on restricted licences." (CVU representative)

The non-targeted stops undertaken as part of this project do suggest that restricted licence holders have higher levels of non-compliance, although the data from the non-targeted stops do need to be treated with caution with respect to this and other comparisons.

In terms of the activity types perceived to be most strongly associated with non-compliance, those engaged in construction, specifically scaffolding, skip wagons and tipper vehicles were frequently mentioned:

"Particularly scaffolders have no idea really what's involved in operating a heavy goods vehicle." (Traffic Commissioner)

"I think tippers, over the years they've always had a bad reputation." (Manager, Construction, Standard)

"There are some industries that are more prone to problems and typically they will be scaffolding and skip hire." (Traffic Commissioner)

7.5 Finding 5: While the HGV industry as a whole believes that clients do have a role to play in improving compliance, not all clients are engaged with the topic or interested in raising compliance levels; many feel that non-compliance is acceptable, particularly when relating to the delivery of goods

Clients of HGV services represent a range of organisation types and individuals. Some clients (in particular smaller clients and those who are further removed from the HGV operations that they procure) perceive that they have little responsibility towards or control over HGV regulatory compliance (for example an independent product retailer occasionally using courier services which will involve an HGV to deliver their goods). Other clients have far greater potential to be involved in and influence HGV compliance³⁷. Requesting compliance standards at the procurement stage and ensuring that these are maintained through the life of the project is a fundamental means of improving compliance for larger clients, and is already being demonstrated by some, particularly in the construction sector. The industry as a whole believes that the role of all types of clients is key and must be strengthened in the future.

"The contractor will only do what the client asks." (Client)

"If the client requires vehicles to be compliant then, you know, they have to be."
(Manager, Construction, Standard)

7.6 Finding 6: Some penalties for non-compliance are not a deterrent and there are variable views on the likelihood of being subjected to an enforcement check

There was a mixed response on the question of the likelihood of being subject to a compliance check by the DVSA or police, with a high perceived risk of detection amongst most survey respondents and some interviewees, but a low perceived risk among others.

"Risk of being caught, it's probably greater [in London] than anywhere else in the UK." (Manager, Haulage, Standard)

"I would say that the majority think that it'll never happen to me." (Manager, Other, Standard)

"...there is very little DVSA present looking for trucks who are breaking the law."
(Driver, Haulage, Standard)

There was also a belief (among around at least a quarter of drivers and managers/owners) that drivers and organisations are able to 'get away' with non-compliance.

"I think generally the perception would be that you'd get away with it more often than you'd get caught." (Manager, Construction, Standard)

Despite penalties for non-compliance being severe (included loss of liberty and large fines) many, particularly fixed penalty notices, are generally considered to be too lenient (particularly by larger organisations), especially for transport managers of drivers found

³⁷ The lack of involvement and engagement by clients in HGV compliance issues was reflected in the lack of response from this group to the survey.

to be non-compliant. More immediate and harsher penalties for non-compliance with general and HGV-specific non-compliance are believed to be needed.

"I would imagine if penalties were stricter then people would be more compliant on issues like telephones and seatbelt and stuff." (Driver, Construction, Standard)

"One would hope that people do take notice of the PG9 or a fixed penalty but I'm not convinced that everybody does take it that seriously." (Driver, Haulage, Standard)

"With the fixed penalty system the driver gets caught at the side of the road, he gets done, very, very rarely does a further investigation take place." (Driver, Haulage, Standard)

Increased publicity around enforcement activities and the resulting penalties was encouraged. Communication to and within organisations would increase awareness of the potential for drivers and operators to be exposed to severe penalties, including awareness about changes to penalties.

"I think they [current deterrents] are good, but they do lack publicity, so to speak." (Driver, Other, Restricted)

"There is need for better communication of the penalties that drivers and operators are exposed to." (Transport solicitor)

Being summoned to the Traffic Commissioner is seen as the ultimate deterrent.

7.7 Finding 7: Non-compliant activity observed by those operating in the industry is reported, but not all the time

Non-compliance cannot be tackled effectively if it goes unreported. Reporting of non-compliance does occur, but around a fifth of survey respondents stated that they had seen non-compliance in other organisations and not reported it. There is currently a lack of an industry-wide safety culture which enables and supports reporting. This is supported by the finding that three key deterrents to reporting non-compliance are individuals not knowing how to report non-compliance (particularly in other organisations), the perception that they are not responsible for reporting observed non-compliance (particularly when it is not deemed to be an immediate threat), and the lack of time to make reports of non-compliance.

"I have no idea how you would report it." (Driver, Other, Standard)

"It would have to be dire for me to want to say anything." (Manager, Construction, Standard)

"I see non-compliance all day every day so do not have time to report everything." (Owner, Construction, Standard)

7.8 Finding 8: There is room for improvement to driver CPC training to ensure it is fit for purpose

The current driver CPC system is seen as important and beneficial, but with a number of shortcomings; the lack of a formal assessment and the option of attending the same course module multiple times in order to achieve the required number of training hours were two key issues mentioned.

"There is no test, no exams, you just have to be in the classroom, you can fall asleep." (Owner, Other, Standard)

"With the CPC of course, the way it is now, there's no test. So you can be from a foreign country with no understanding of the English language. You can sleep through the seven hours on the training. And you will still get your training attendance points." (Owner, Construction, Standard)

"I went on five courses and three of those courses I sat the same course for three days, just in order to satisfy that requirement. Perfectly legal, perfectly legitimate, I did my training, but out of those 35 hours, 21 hours were on the same course, what's the point in that?" (Owner, Haulage, Standard)

A desire was also expressed for more practical and less classroom-based training to be offered.

"It needs to be practical training; drivers don't want to sit in an office for a day, by their very nature." (Owner, Haulage, Standard)

7.9 Finding 9: London presents different challenges to other UK cities, in terms of its operating environment and regulations

Operating HGVs in London is widely accepted as presenting challenges over and above other UK cities. The environment can be more demanding in terms of the amount of traffic and vulnerable road users, and difficulties finding suitable and legal parking places to load or unload or to take rest breaks.

"There's a lot more, sort of, deliveries perhaps that take place, there's a lot more traffic, there are a lot more holdups, so I think operating in and around London can be a lot more difficult than other places in the UK." (Manager, Other, Restricted)

London also requires HGV operators to comply with regulations and requirements which are not present in other UK cities. Over half of the survey respondents agreed or strongly agreed that the rules and regulations associated with operating an HGV in London are too complicated, and over 80% felt that compliance with regulations for HGV operations was much harder or a little harder in London compared to the rest of the UK.

"Multiple sets of rules and regulations make driving in London much harder." (Manager, Construction, Standard)

"Congestion charge and Low Emission Zone along with the restricted hours make it easy to fall foul of one rule or another." (Driver, Other, Standard)

Some of the London-specific regulations, in particular the London Lorry Control Scheme, are seen to be outdated or unnecessary, and there was a desire for regulations to be reviewed and streamlined. Non-compliance may be more likely when rules are seen as irrelevant (see Section 6.4.2).

"The London Lorry Control [Scheme] is out of date and causes unnecessary paperwork and problems." (Owner, Other, Standard)

"The routes are outdated. Now, I totally agree with the lorry control. You don't want lorries going all round London, but the routes are so outdated. They're 30 years out of date." (Manager, Construction, Standard)

"I think the general view is that, you know, the [London Lorry Control] scheme really needs to be relooked at and it needs an update and an overhaul."
(Manager, Other, Restricted)

8 Recommendations

Interview and survey respondents were asked how they felt HGV regulatory compliance could be improved. Section 8.1 presents their views, and in Section 8.2 these suggestions are combined with the other research findings to formulate a list of key recommendations from the project.

8.1 Respondent recommendations

Respondents to the interviews and survey were asked how non-compliance in London could be improved. Their suggestions are presented below.

8.1.1 Rules and regulations

Making changes to rules and regulations was the most frequently suggested area for improvement. These fell into a number of areas, as described below.

8.1.1.1 Simplify rules and regulations

A key finding reported by respondents was that the number and perceived complexity of rules and regulations relating to HGVs, especially in London, are barriers to achieving full compliance. Some respondents suggested that one improvement would be a simplification of the rules to make them easier to understand, including presenting rules in a clear, easy-to-understand format:

"Simplify them, people don't comply because it is too complicated and certainly in our case we don't fit the boxes so it takes forever to work out the correct thing to do." (Owner, Other, Restricted)

"A more common sense approach, some rules/regulations make it almost impossible to do your job in a compliant manner." (Manager, Other, Standard)

"The problem we've got is many laws they started years ago and some have stayed exactly as they are and others have had amendments put in and slight adjustments. But I think, certainly we've discovered, there are a lot of people who get confused purely because, and I sort of half understand why, but a lot of law is written with what-ifs and buts and exemptions that actually muddy the water and leave people confused. I do think some of it could be rewritten in a very basic, clear way that describes exactly what a vehicle is or isn't and what the regulations do or don't comply to. With less confusion it would be even clearer for people to make sure they complied." (CVU representative)

"You've got the low emissions zone and you've got the congestion charge. So the low emissions zone is becoming a bit irrelevant now as everybody is running newer trucks. But to comply with the congestion charge and the Lorry Control Scheme... Why can't it all be the same? Why can't you just make the congestion zone the same as the control scheme?" (Driver, Haulage, Standard)

"If we could start again with co-defined requirements, that'd be great, but that's not realistic. There are certain anomalies between goods and PSV and you think 'why can't they be consistent'...it's getting that balance between sensible regulations and safety...do I think there's a great call for a bonfire of the regulations? No! But they could be clearer. They're not written in a way that the

average operator or a driver is going to be able to read them.” (Traffic Commissioner)

Others made more specific suggestions, including:

“Less variations on times/weights/sizes.” (Driver, Haulage, Standard)

“The rules could be simplified in relation to stopping for loading and unloading.” (Manager, Haulage, Standard)

“Simplify the parking, red routes and box junctions.” (Manager, Construction, Restricted)

It was suggested that as well as being simplified, rules and requirements should be made more consistent, and the number of agencies or organisations with compliance requirements reduced or standardised:

“The entire approach to compliance in London is completely over complicated. There are so many - Regulatory, FORS Bronze, Silver, Gold, CLOCS, Crossrail, Costain, Vinci, Mace etc etc etc.” (Manager, Haulage, Standard)

“Make it so you only deal with one organisation.” (Manager, Construction, Standard)

“Standardise FORS with Crossrail etc so there is only one set of rules.” (Manager, Construction, Standard)

“We have taken a risk and spent a huge amount of money to ensure we are FORS Silver. However when you get to a site sometimes it turns out it is Crossrail or Costain and completely different rules apply. Customers do not understand the different standards so do not fully understand what to ask for which can result in failed deliveries/collections.” (Manager, Haulage, Standard)

8.1.1.2 Change rules and regulations

A number of changes to the existing rules and regulations were suggested.

“The rules and regulations should be relaxed...we can't move without permits, we can't stray off route, we can only enter and leave at certain times and we can't park anywhere to match times for getting on and off site. The truth is both us and our drivers detest going in to London.” (Owner, Standard, Construction)

These included relaxation and flexibility of rules such as:

- Drivers' hours legislation (including *“linking driving hours with working hours more, make the breaks fall at the same time to simplify things”* (Manager, Other, Standard))
- London Lorry Control Scheme (particularly relaxation for delivering to shops and construction sites at night)
- Red routes
- Parking regulations
- Mirror requirements

A desire was also expressed on a number of occasions for the amount of 'red tape' to be reduced.

8.1.1.3 Remove rules and regulations

Complete removal of some regulations was also suggested, in particular the London Lorry Control Scheme, which is seen as "outdated" and perceived as being "confusing for drivers".

"I would say stuff like the London lorry ban, get rid of it, just get rid of it."
(Owner, Construction, Standard)

8.1.1.4 Nationalise rules and regulations

It was felt that rules and regulations that apply solely to London should not be in place, and instead that rules and regulations should be made the same for the whole of the UK.

"London has introduced extra rules. When we implement these across the whole of the UK fleet for fleet standardisation, we get a lot of kick back." (Manager, Construction, Standard)

8.1.1.5 Less frequent changes to rules and regulations

Some respondents indicated that changes to rules and regulations are made too frequently, making it difficult to maintain compliance.

"We consider ourselves a highly compliant operator but even we are becoming confused and frustrated by the constant changes. There needs to be one standard in London to comply with, not ten different ones." (Owner, Construction, Standard)

"Stop changing the rules so often so companies can achieve current standards and compliance issues." (Manager, Haulage, Standard)

"There appears to be an unstoppable desire to continuously add layers of regulation and guidance on top of one another." (Manager, Other, Standard)

- Many respondents suggested that particular rules and regulations should be simplified, changed, updated or removed
- It was also proposed that London-only regulations be removed, and that changes to rules and regulations should be less frequent

8.1.2 Parking and facilities

A central theme for suggested improvements was parking, both in terms of availability of locations for driver rest breaks, and parking for unloading goods.

"Improvement needs to be made for parking of artic and large HGVs for the purpose of tacho drivers hours, 45 min rest periods." (Driver, Construction, Standard)

"Have areas outside the M25 to stop vehicle prior to entering the centre of London." (Manager, Haulage, Standard)

"Allow time for vehicles to be unloaded without having parking violations on a daily basis." (Manager, Haulage, Standard)

"To make more parking within London would ease the burden and make compliance easier." (Driver, Haulage, Standard)

"Less strict enforcement of PCN's whilst conducting loading and unloading operations." (Manager, Haulage, Standard)

"Delivery points should be made responsible for providing suitable penalty free loading/unloading points." (Manager, Haulage, Standard)

The current provision of driver facilities such as toilets was also an area suggested for improvement.

"Better facilities for vehicles and drivers within London." (Manager, Haulage, Standard)

"If you are a commercial customer and you have an HGV delivering, there ought to be a duty to allow the driver to use toilet facilities and wash facilities. It's a significant issue." (Traffic Commissioner)

- The provision of more parking facilities for HGVs to allow their drivers to take rest breaks in London without parking illegally was suggested
- Improved facilities for drivers were suggested

8.1.3 Infrastructure changes

Changes to infrastructure and the delivery environment were proposed. Improved signage, in particular relating to parking and loading/unloading, was one area of suggested improvement:

"Simplify some parking signs." (Driver, Haulage, Standard)

"Weight limits and that, every now and again they'll get lost and go down a seven and a half ton limit [road]. That's only just because they're confused; there's so many signs about sometimes." (Manager, Construction, Standard)

"Improved signage, further from obstacles and restrictions." (Driver, Haulage, Standard)

A few respondents suggested changes to allow HGVs to use bus lanes, reducing the risk of delays to deliveries:

"Create HGV only lanes and roads, give trucks the same treatment that buses get." (Driver, Other, Standard)

"If more bus lanes were made available for HGV's, even only at certain times, it would help traffic flow." (Manager, Construction, Standard)

- The simplification of signs relevant to HGVs was suggested
- It was suggested that allowing HGVs to use bus lanes may reduce congestion and delays

8.1.4 Increased enforcement activities

Another key area of suggestions for improvements related to enforcement activities. Many respondents mentioned *"more spot checks"* and *"more roadside enforcement"* to motivate more compliant behaviour by increasing the probability of non-compliant operators being stopped and caught. One respondent suggested that this would improve confidence in the construction industry and reduce the need for additional contractual requirements.

"The regulatory compliance on HGV operators is already stringent and necessary...if there were more checks on the basics from public enforcers, the large construction companies who are requesting multiple differing standards are adhered to would have more faith in the industry in the first place." (Manager, Haulage, Standard)

Some respondents suggested that as well as having more checks, they should be more targeted, in particular towards:

- *"Vehicles and / or companies that have historical issues with compliance rather than those operators who keep within the regulations." (Manager, Haulage, Standard)*
- *"Obvious offenders." (Manager, Haulage, Standard)*
- *"European vehicles." (Manager, Haulage, Standard)*
- *"Tipper operators." (Owner, Haulage, Standard)*

The introduction of random checks was also proposed by some.

"More regular checks on truly random vehicles. The traffic light systems allows operators to get a green rating and then relax." (Driver, Other, Standard)

Generally, respondents felt that having a greater enforcement presence would improve the effectiveness of enforcement activities, but acknowledged that this had implications on resourcing.

"I think they do well, against a background of under-resourced and underfinanced. So, you know...their systems are pretty good to target non-compliance, but they're stretched, I know they're stretched." (Manager, Haulage, Restricted)

The use of technology to improve enforcement activities was another area mentioned by some respondents.

"More use of technology and intelligence gathering to target offenders." (Manager, Construction, Standard)

"Better speed cameras to monitor HGV drivers on the main thoroughfares in outer London." (Manager, Haulage, Standard)

"Wifi-enabled tachos to be read when vehicles go past." (Manager, Other, Restricted)

As well as roadside enforcement activities, the use of audits was also suggested, with one respondent describing a system already in place in their organisation.

"More uninvited visits to companies to check through vehicles and paperwork." (Manager, Other, Restricted)

"They don't need to do roadside stops and checks, they can go to the operators and go through the operator's paperwork and check. And if the operator hasn't got his paperwork correct, then obviously he's not doing what he should be doing. And then you can inspect the vehicles and go from there." (Owner, Haulage, Standard)

"My company is audited by a couple of my customers, the idea of which is to prove our own compliance. This openness allows us to continue trading with the customer." (Manager, Construction, Restricted)

- Suggestions for more effective enforcement related to:
 - Increased enforcement checks, particularly targeted checks but also non-targeted stops
 - Increased use of technology to enhance enforcement activities
 - Enforcement checks and audits at operators' premises

8.1.5 Penalties

Suggestions relating to penalties for non-compliance included:

- "A graded system of fines/penalties." (Driver, Construction, Standard)
- "Fast track penalties." (Driver, Other, Standard)
- "Review of PCN issuing with borough councils." (Manager, Other, Restricted)

A number of respondents endorsed the idea of having harsher penalties for those found to be non-compliant, although such suggestions may have been made by respondents with lower levels of awareness of the current penalties in place.

"I think, probably heavier fines would help, because, at the moment, I think, you know, they are not heavy enough to hurt." (Driver, Other, Standard)

More immediate consequences were also supported.

"For rogue cowboy operators, I would take the vehicles off the road straight away and don't give them too many chances." (Driver, Construction, Standard)

"Action taken immediately, even if business has to close." (Driver, Construction, Standard)

"Removal of non-compliant vehicles at spot check. Issuing a probation on a vehicle doesn't always work. Tow them away." (Client)

More equal penalties for drivers and operators were also proposed, with the suggestion that drivers can bear the brunt of the current penalties system.

"Many drivers are encouraged into non-compliance by managers and operators. the drivers get stopped and issued FPNs & GFPs yet very rarely does it go any further than that unless there has been wholesale rule breaking." (Driver, Haulage, Standard)

"If the EU or UK government made traffic operators and transport managers equally liable, fined and face prison for all driver infringements, it would stop companies encouraging (forcing) drivers to break the law." (Owner, Construction, Standard)

"Stronger punishment for those that do not comply at all levels of the company." (Manager, Haulage, Standard)

8.1.5.1 Leniency

A more lenient approach when genuine mistakes are made was advocated by some respondents, in particular with respect to drivers' hours and parking.

"A more flexible attitude to tachograph hours for drivers delivering/collecting in London." (Driver, Construction, Standard)

"Be tolerant and lenient when genuine mistakes are made. The signage is fine if you know where you are i.e. weight limit on a certain road, often you don't know where you are or what road you will be going onto or what bridge you will go over or under, then you have got traffic lights, red routes, congestion charge zones, emission zones, bus lanes, cycle lanes, parking restrictions, different times..." (Driver, Haulage, Standard)

"More flexibility and understanding of what operators go through...I certainly think more of an understanding from parking enforcement, those sorts of people; and I also think standardising regulation across all the boroughs will be incredibly useful." (Driver, Haulage, Standard)

- Proposed improvements to the current system of penalties included:
 - More severe penalties
 - More immediate penalties/punitive action
 - Managers having greater liability for driver non-compliance
 - A more lenient approach to genuine mistakes

8.1.6 Consultation and guidance

Suggestions relating to communication and guidance included engagement and consultation, and clear guidance for stakeholders at all levels of the HGV industry.

8.1.6.1 Engagement and consultation across the industry

Engagement between the regulatory/enforcement bodies and those operating in the HGV industry was encouraged, for example:

"I think DVSA could work much closer with operators." (Manager, Construction, Restricted)

"Talk to drivers." (Driver, Haulage, Standard)

"Consult with organisations before any changes are made, e.g. FORS." (Manager, Other, Standard)

"Continued consultation with Trade associations." (Manager, Other, Restricted)

"Offer something like a free audit, and maybe go back to the good old days of VOSA, when they used to do educational visits." (Owner, Haulage, Standard)

In addition, it was felt that communication between the regulatory/enforcement bodies could be improved.

"Too many bodies doing too many different sections and not communicating with each other, for example we have London Lorry Control restricting the roads to be used between 21:00 and 07:00 then have numerous agencies pushing for night deliveries." (Owner, Haulage, Standard)

"I'm well aware of various policing or government bodies that all have their own systems but getting them to link up has always been painful...it would be good if everybody knew everybody's concerns and could work together on it. It's back to the good old police, DVSA and customs. It's that old adage where we are all relevant to a jigsaw but really do we sit down and actually complete the picture?" (CVU representative)

8.1.6.2 Improved guidance and communication

There was considerable support for easy to access, clear guidance for both drivers and transport managers, in particular relating to London-specific rules and regulations and any changes to these. Guidance relating to how to achieve compliance, rather than simply setting objectives, was also recommended.

"Well, I think the motivation should be more supportive rather than just the big stick approach...maybe there should be some more surgeries where people could go in and ask questions, without feeling...it's not easy. So I just think there should be more to help people to be compliant, rather than, you know, it's a fine, it's a big stick." (Owner, Haulage, Standard)

A number of channels of communication were mentioned including emails, leaflets, and surgeries through which organisations could be notified about changes in legislation and make enquiries.

"If you can get email [addresses]...you can send out leaflets and what's going on in the industry through emails and text messages, just to remind people probably might help." (Manager, Construction, Restricted)

"More information sent regarding the London specific rules/regulation to be sent either by post and/or email to companies operating within London." (Manager, Other, Standard)

"A comprehensive transport managers' booklet or poster detailing rules and regulations which would be on display in drivers' areas and in our transport manager's office." (Owner, Construction, Standard)

"I think the internet is the way forward and may produce a monthly newsletter that we can print of and show it to my employees about rules and regs updates." (Owner, Construction, Standard)

A particular area of operations that was identified as needing guidance relates to achieving tachograph compliance,

"There is no national guidance on what represents a good tachograph compliance system issued by the Department for Transport, VOSA, or the Traffic Commissioners. There's guidance on the rules, to tell you what the rules are, but there's no guidance on how you manage your operation...there's no guidance on what a good system involves." (Transport solicitor)

"Contrast this with guidance on maintenance arrangements which has existed for many years and has significantly improved and harmonised standards across the UK." (Transport solicitor)

More specific suggestions were also made as to how guidance could be shared with drivers and operators.

"One simple website aimed specifically at HGV drivers that is mobile friendly and is freely accessed via wifi at outlying Motorway Service Areas. Maybe include a route planner and LLC restrictions, maybe a registration input that'll legally plan a route, inform of congestion charge." (Driver, Haulage, Standard)

"Include a compliance section to the FORS website making information easy to search. It would...make access to the industry less of a struggle." (Manager, Construction, Restricted)

The availability of free, easy accessible resources was felt to be crucial, especially for smaller organisations.

"More communication, more information out there would be useful. I think especially for SMEs it goes a little bit more sort of free resources available. So as I said just simple things like free downloadable posters for staff, to communicate with staff, you know, things like that." (Owner, Haulage, Standard)

Some respondents suggested that communications should also include publicity around enforcement activities (see also Section 6.10.5) and operators found to be non-compliant, as well as 'good news' stories.

"Enforcement and lots of publicity about it." (Manager, Construction, Standard)

"Wider publicity for those found to breach the rules and regulations on a regular basis." (Owner, Other, Standard)

"More recognition of good compliance in selection for work, publicity and reward." (Manager, Construction, Standard)

- Increased consultation and engagement was encouraged...
 - by the enforcement and standard-setting agencies with HGV operators and trade associations
 - between the enforcement and standard-setting agencies
- Respondents advised of a desire for easily accessible, clear, comprehensive guidance for drivers and managers, particularly relating to:
 - London-specific requirements
 - changes to rules and regulations

8.1.7 Education and training

It was felt that both drivers and the public could benefit from training.

8.1.7.1 Driver training

Section 6.11.1.1 discussed specific perceived shortcomings with the current CPC training package. Suggestions for improvements included a mandatory CPC unit on achieving compliance and checks on the legitimacy of drivers who have taken the CPC.

"Most drivers DO NOT understand these regulations so more education please which should be inclusive as part of the CPC training." (Driver, Other, Restricted)

"Make a module within driver CPC compulsory with regard to instructing compliance." (Owner, Construction, Standard)

Another issue identified from the interview data related to more general driver training; in addition to DCPC training, it was suggested that "more training courses" for drivers are needed specific to legislation. It was felt by some interviewees that there is a paucity of guidance about how to practically follow the legislation or that guidance and training is difficult to identify.

"[There is] probably [a gap in] current legislation. I think I would say that the majority of drivers would never ever look on a website and see what the current

legislation may be on driving in London, or anywhere, really, so I think, probably, that would definitely be a must.” (Manager, Other, Restricted)

“Awareness of what the penalties could be, obviously; awareness of consequences of not conforming, for them and for the company.” (Manager, Other, Standard)

Other more general training requirements highlighted included:

- General driver training

“I think training-wise we need to re- look at the beginning of the training. In the major companies they do it, they reassess drivers every couple of years, they have driver assessors.” (Client)

“Safe and fuel efficient driving for general driving is quite important.” (Owner, Haulage, Standard)

“Road awareness, checking your vehicle, you know, routine checking of your vehicle, daily walk around, how you do that effectively. Safe loading and unloading of your vehicle and that sort of things.” (Owner, Haulage, Standard)

- Training about vulnerable road users

“With vulnerable road users and occupational road risk hitting the headlines, they’re the key ones at the minute.” (Manager, Haulage, Standard)

“We have a particular problem within our industry with vulnerable road users. Can you tailor a course specifically for vulnerable road users?” (Manager, Construction, Restricted)

- Tachograph training

“The current system, I wouldn’t say it’s complicated, but it is a bit of a minefield for, you know, a lot of drivers...if you read a manual on a tachograph, you think, blimey, you need a degree, in English literature to work this lot out.” (Manager, Other, Restricted)

- London-specific driver training

“For instance, like entering London on specific routes, and going out of London on specific routes. Because we all live in the London boroughs anyway, at some time or another, I’m sure, most drivers will venture into London, and I think that definitely should be included.” (Manager, Other, Restricted)

“Basically on the rules and regulations that come into effect in London.” (Driver, Construction, Restricted)

8.1.7.2 *Restricted operator licence holder training*

The lack of a requirement for formal training of restricted operator licence holders is perceived as contributing to non-compliance in this group of operators. The addition of such a requirement was proposed.

“They could do a smaller course for a restricted licence CPC holder, I believe. To know the very basics of transport. They don’t need to know possibly a lot of the weights and they don’t, you know...they don’t need to know axle spacings and

stuff like that...but, you know, it would be good to have a small test for them"
(Manager, Construction, Standard)

However a requirement for the same level of training as a standard licence holder was advised against.

"If you look at the syllabus for a transport manager CPC, it's massive; things like employment law, commercial law. They don't need that but they do need somebody who has some sort of rudimentary understanding of what the rules are...not the full transport manager qualification because most of that won't be relevant to them. I think there's an argument for saying that these are prior to the granting of a licence, or some point shortly after the granting of a licence, somebody will take some level of understood qualification." (Traffic Commissioner)

8.1.7.3 Educating the public

Proposals relating to educating members of the public about HGV-related issues were made, in particular relating to car drivers and cyclists.

"Public information ads to educate cyclists and car drivers. The Exchanging Places program should be increased." (Owner, Construction, Standard)

"Take some pressure off the drivers and educate cyclists on how drivers see or can't see them." (Owner, Other, Standard)

"Educate the public as to the problems facing HGV drivers in London." (Owner, Other, Standard)

"More public knowledge cycle education for cyclists." (Manager, Construction, Standard)

8.1.7.4 Educating clients

There is a perception that clients have a role to play in improving compliance, but lack awareness of how they can do this. This finding was echoed in some of the suggested improvements:

"There should be greater checking of WRRR by client organisations – WRRR compliance should be the norm in contract specification." (Owner, Construction, Standard)

"Raising profile of FORS with procurement officers." (Owner, Other, Standard)

"They demand things that aren't deliverable. So I think it's a bit more of a partnership approach is what's needed...to understand what the rules are as well." (Traffic Commissioner)

- Suggested improvements to driver training included mandatory CPC modules relating to regulatory compliance and training on the practical application of legislation
- Public education was also suggested, to improve awareness of issues facing HGV drivers in London
- Education of those procuring HGV services was another proposal

8.1.8 Reporting

The introduction of an anonymous reporting system was suggested.

"I think if they've got an option, a one-stop number where they can then report said incidents in confidence, and know that it will get followed up then they then know that...they can actually do something about it. Because if you report it to the owner that owns a small business, he's liable to tell you one or two things, probably none of them will be very pleasant." (CVU representative)

8.2 Overall recommendations

The recommendations associated with the findings described in Section 7 are described below. Figure 57 illustrates how the recommendations address the findings, while **Error! Reference source not found.** suggests which agencies and organisations should take ownership of each recommendation. Where possible, the ownership of these recommendations must lie with the relevant industry stakeholders, including regulators as specified below, and the HGV industry as a whole (i.e. any individual involved in the operation of one or more HGVs).

The recommendations are not presented in any particular order; all are equally important in reducing HGV regulatory non-compliance in London.

As far as possible, the recommendations should be enacted such that they can apply to the UK as a whole as well as London.

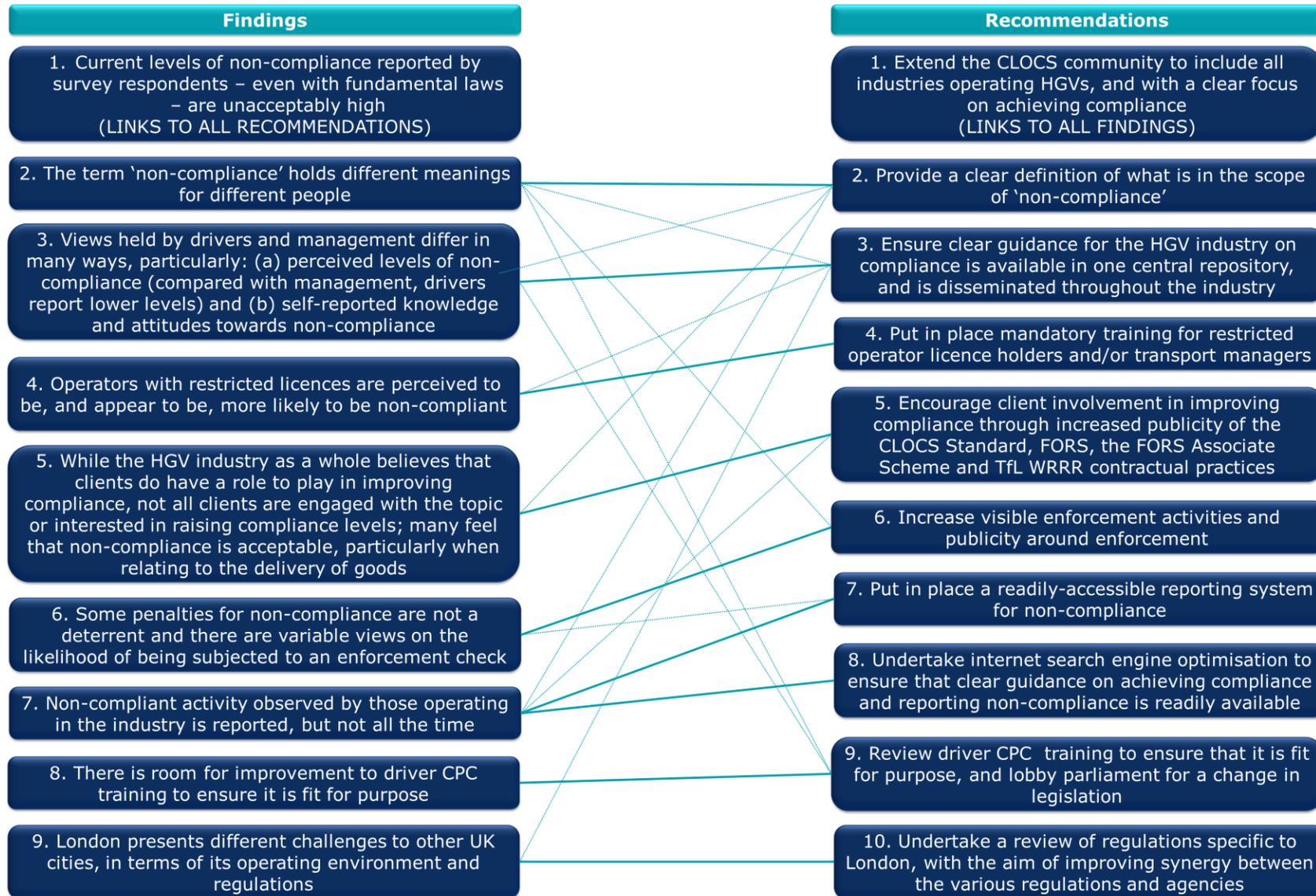


Figure 57. Findings and associated recommendations

	TfL	DVSA	DfT	Traffic Commissioners	Trade Associations	Met Police	Borough Councils
1	✓						
2	✓	✓	✓	✓			
3	✓	✓			✓		
4		✓	✓				
5	✓				✓		
6	✓	✓	✓	✓		✓	
7	✓	✓				✓	
8	✓	✓					
9	✓	✓	✓				
10	✓		✓				✓

Figure 58. Suggested responsibility for implementing recommendations

8.2.1 Recommendation 1: Extend the CLOCS community to include all industries operating HGVs, and with a clear focus on achieving compliance

The existing CLOCS community is working to “revolutionise the management of work related road risk and embed a road safety culture across the industry”. It is currently focused on the construction industry but should continue to expand to include other industries which operate HGVs, both in London and nationally. A clear focus on achieving compliance should be maintained and strengthened; for example a fourth workstream could be included around improving compliance of organisations, drivers and vehicles.

8.2.2 Recommendation 2: Provide a clear definition of what is in the scope of ‘non-compliance’

In order to improve communication about non-compliance and encourage observed incidences of non-compliance to be reported, a clear definition of what constitutes ‘non-compliance’ is required (including vehicle, driver, contractual and road law). Once established, this definition should be widely publicised and organisations should be encouraged to ensure that it is disseminated to drivers and clients. The definition should include road laws such as keeping within posted speed limits, and wearing seat belts.

8.2.3 Recommendation 3: Ensure clear guidance for the HGV industry on compliance is available in one central repository, and is disseminated throughout the industry

In combination with Recommendation 1, it is crucial that individuals involved in the HGV industry have easily accessible, clear, simple guidance on how to achieve compliance, particularly in London. This can include information and toolkits on key issues (e.g. how to ensure compliance, how to report non-compliance) and should be aimed at drivers, managers, owners and clients of organisations operating HGVs. The guidance should be collated into a central, easily navigable repository, and should be clearly signposted when operator licences are issued. The contents of any existing guidance aimed at the HGV industry, and the way it is currently disseminated, should also be reviewed. The

review should ensure that clear guidance is available for every aspect of compliance, and should assign responsibility to the relevant agencies for dissemination of the information amongst drivers, managers, owners and clients.

8.2.4 Recommendation 4: Put in place mandatory training for restricted operator licence holders and/or transport managers

Holders of restricted operator's licences are not currently required to undergo any training or to prove their knowledge and understanding of the licence requirements, and the current optional nature of training for this group results in a range of knowledge on compliance amongst those operating vehicles on a restricted licence. Mandatory training similar to that currently required of transport managers holding a CPC for a standard operator's licence is required to ensure that all operator's licence holders or transport managers have the same baseline knowledge of understanding of their responsibilities, and what they need to do to ensure compliance across their vehicles and drivers.

8.2.5 Recommendation 5: Encourage client involvement in improving compliance through increased publicity of the CLOCS Standard, FORS and the FORS Associate Scheme

The CLOCS Standard for managing work related road risk is a common standard for use by industries operating commercial vehicles which deliver to, collect from or service a project, premises or property. It is intended for use by clients within contracts and covers issues relating to vehicles, drivers and clients. Further promotion and implementation of this standard, particularly among non-construction industries, would benefit safety and compliance. Future iterations of the standard could make it more inclusive of all industries, particularly if CLOCS is extended (see Recommendation 10).

The FORS Associate Scheme is designed to encourage those who 'don't operate commercial vehicles and would like to help drive up standards across the sector' to either 'set FORS' best practice standards and legal compliance at the heart of your freight distribution activities' or 'offer an exclusive discount on your products and services that adds value to the scheme by enabling operators to comply with contractual/legal requirements etc'. Focusing on increased publicity of this scheme amongst clients procuring the services of HGVs across all sectors will encourage client involvement in driving down non-compliance³⁸. The public sector should be encouraged to demonstrate leadership, with major public sector organisations becoming FORS Associates and introducing compliance requirements as part of their contracts.

Clients should also be encouraged to consider whether the organisations they contract are FORS accredited, and to what level, since FORS accredited operators are more likely to be compliant. The existing directory of FORS registered and accredited companies should be updated so that it is easier to search (e.g. allowing a user to search for an operator in a particular sector within 20 miles of a specific postcode, and including contact details).

³⁸ Related to this finding is a previous finding from the CLOCS report (Delmonte et al., 2012) which stated that 'Principal contractors and clients (in the construction industry) should use more realistic delivery time slots.' This recommendation still stands (parentheses added).

8.2.6 Recommendation 6: Increase visible enforcement activities and publicity around enforcement

Visible enforcement, at the roadside or at operator premises, is a key means of increasing the real and perceived risk of being checked. Continued high levels of publicity around enforcement activities will also increase the perceived risk, particularly among operators who may go into London less frequently and so not see the enforcement activities first-hand. Such activities could include press releases relating to both hard-hitting and routine cases of enforcement, and will also help to dispel the apparent perception in some quarters of the industry that certain penalties for non-compliance are too lenient. Trade association magazines and websites should be involved in this publicity, as well as methods which would target operators who do not have trade association membership, such as posters at truck stops and adverts placed on online forums for transport managers and drivers.

8.2.7 Recommendation 7: Put in place a readily-accessible reporting system for non-compliance

A unitary anonymous reporting system for reporting non-compliance is required. Based on the findings, this system should make reporting non-compliance quick and easy, should provide clear feedback and results, and should not require any proof in order to make a report. A combination of telephone and internet-based reporting would enable individuals across the HGV industry to have access to the system. A reporting system for London is already in place (Roadsafe London) for members of the public to report criminal, nuisance and anti-social behaviour on London's roads; this could be publicised and expanded so that three key types of report can be made both online and by telephone: reports by members of the public, reports of issues observed in the reporter's own organisation, and reports of issues observed in other organisations. (See also Recommendations 3 and 9.)

8.2.8 Recommendation 8: Undertake internet search engine optimisation to ensure that clear guidance on achieving compliance and reporting non-compliance is readily available

As internet searches were reported by drivers, managers and owners to be a key means of finding information and advice on compliance-related issues (all aspects of compliance including how to achieve compliance and how to report non-compliance), it is important that internet search engines return the most relevant, clear and useful guidance (i.e. the repository of information developed under Recommendation 2). Search engine optimisation of the guidance websites and documents deemed most useful will increase the probability of this guidance being found and used.

8.2.9 Recommendation 9: Review driver CPC training to ensure that it is fit for purpose,

Driver CPC training aims to ensure that professional drivers have a good understanding of current legislation and equipment, and to improve road safety. Currently, drivers undergoing periodic training are able to attend the same module a number of times and regardless of how relevant it is to their role. Ideally, the system would be designed such that drivers must vary the modules that they attend, and ensure that these modules are pertinent to their training needs. Transport managers or other appropriate role holders

should be able to conduct a training needs analysis and ensure that the outcome of this analysis is used when selecting CPC modules.

8.2.10 Recommendation 10: Undertake a review of regulations specific to London, with the aim of improving synergy between the various regulations and agencies

The additional regulations and requirements placed on operators in London were felt to contribute to non-compliance (e.g. London Lorry Control Scheme, parking and unloading restrictions, Low Emissions Zones, the soon-to-be-introduced Safer Lorry Scheme). In particular the London Lorry Control Scheme was felt to be outdated and in need of review. A comprehensive review of both regulations and contractual requirements should be conducted, with the aim of combining and streamlining to make them easier to understand and comply with.

8.2.11 Further research

Further research is advised to explore some of the issues raised during this research. For example, what regulations could be simplified and how? Could there be a recognition scheme for drivers? How could the deterrent value of the current penalty system be maximised? Could the driver CPC be improved? Would enhanced transparency relating to organisations involved in non-compliant activity (for example by improving accessibility to the Traffic Commissioner Applications and Decisions data) be of value in encouraging compliance?

In addition, the research focused only on HGVs. Other vehicle types may have a high incidence of non-compliance, in particular vans (*"don't ignore the vans. I mean, for me, probably one of the biggest areas of non-compliance in goods vehicle transportation is the sub-7.5 ton and sub 3.5 ton vehicle operation where's there's a huge issue of non-compliance, you know...be aware that they are a massive issue"* (Transport solicitor)) and so the value of future research may be increased by including smaller goods vehicles.

Continued research and exploration of the issues surrounding non-compliance, whether regarding industry-specific regulations or fundamental road laws, is key to gaining a complete understanding of why non-compliance occurs, and how to eliminate it.

9 Limitations of the research

All research methods have their limitations. The current research has identified a number of issues using quantitative and qualitative research techniques. The sections below describe the specific limitations of each task.

9.1.1 Literature review

The literature provides a picture of current compliance levels within the HGV industry through a variety of somewhat limited research methodologies, with scant research carried out in the UK. Very little research has focused on investigating and comparing levels of compliance between cities so very little is known about compliance levels in London. Some work has compared vehicles of GB and non-GB origin within GB such as work done by VOSA (2014) which found GB vehicles to have slightly higher compliance levels in most offences. As well as this, the research on motivations is limited to work in Australia and may not be generalisable to the UK industry; although both cultures are relatively similar the sheer size difference of the countries and the difficulties in enforcing large areas may lead to different reasons for non-compliance.

9.1.2 Data analysis

The major limitation of the analysis presented in this section is that the two agencies target vehicles for inspection based on visual assessment, previous history of non-compliance, intelligence from external sources and specific industry sectors.

The initial data analysis used data from these targeted enforcement activities, meaning that the level of non-compliance in the data gathered from these activities is likely to be higher than would be expected in the overall population. The non-targeted stops undertaken to try and minimise this bias showed that the actual level of non-compliance was lower than indicated by the targeted stops, although still unacceptably high. The non-targeted stops were limited however (for example they were small in number and mostly undertaken in a single month) and a greater number of such stops will be required if we are to undertake robust comparisons of compliance levels between sectors and licence types, to build on the indicative data reported in this document.

The raw data from both datasets also indicated that the information regarding inspections is recorded differently by different officers and forces and this may have affected the results.

9.1.3 Survey

Despite approaching over 15,000 contacts in the industry, using a variety of contact methods, the target survey response of 750 was not achieved. As described in Section 2.3.5, this resulted in a revision of the scope, meaning that comparisons between sectors and licence types were not typically possible. The final sample is likely to be biased towards those representing the more compliant or safety-engaged end of the spectrum of operators, as those who are less compliant are likely to avoid taking part in

research in which they will be required to respond to questions relating to their non-compliance with legislation or regulations³⁹.

A key research question related to differences between restricted and standard operator licences. Whilst 44% of goods vehicle operators in the South Eastern and Metropolitan Traffic Area have restricted licences (Office of the Transport Commissioner, 2015), only 18% of responses to the survey were from owners, managers or drivers representing organisations with restricted licences. This unrepresentative response rate may indicate apathy towards HGV safety-related issues, resulting from operators with restricted licences not considering HGV operations to be related to their primary business activity, and therefore not feeling that the survey was targeted towards them (the same is true of clients, who were also difficult to engage with). The representativeness of the findings may be further compounded by the possibility that those operators with a restricted licence that did choose to respond could be more engaged with their organisation's HGV operations, compared with those that did not respond. If so, this would go some way to explaining the near-absence of significant differences between restricted and standard operator licence holders.

The comparison between drivers and managers/owners throughout the report provided some interesting insights into these groups. However a limitation of the data is that these drivers and managers/owners were drawn from different organisations⁴⁰ and so true comparisons of these groups' attitudes towards, for example, their organisations' reporting systems was not possible.

9.1.4 Interviews

While the desired sample size was achieved, three main limitations were identified from the qualitative interview tasks. Firstly, the method for recruiting interviewees was through the pool of respondents from the quantitative survey who had volunteered to take part in interviews. As described above, the biased nature of the final sample suggests that interview participants may also have been biased and therefore more likely to be compliant.

The final limitations associated with the qualitative phase are that (due to the very nature of qualitative research) the responses given are unlikely to fully represent opinions across the industry as a whole, and it is not possible to generalise the findings in quantitative terms.

³⁹ Whilst efforts were made to market the survey as relating to 'HGV safety in London', respondents would soon realise that the survey focused on compliance issues.

⁴⁰ Some respondents may represent the same organisations; the anonymous nature of the data means it is impossible to ascertain whether this is the case.

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Appendix A Driver, manager, owner and client surveys

All four surveys are provided below. Managers and owners were asked the same questions with the exception of “which of these describes your main role”. The manager survey is included below, for the owner survey the response options for question 4 were:

1. Owner of a company which operates HGVs
2. Director of a company which operates HGVs
3. Sole trader or partner in a company which operates HGVs
4. Shareholder in a company which operates HGVs
5. Other (please specify):

Please note that the short client survey (Appendix B) includes some additional questions to those in the complete client survey.

DRIVER SURVEY

What is the purpose of this survey? This research is looking at HGV operations in London, with the aim of improving the safety of HGVs (i.e. vehicles of 3.5 tonnes or over), HGV drivers and other road users.

Who is conducting the research? This research is being carried out by TRL (the Transport Research Laboratory) on behalf of Transport for London.

Will my answers be confidential? All of your responses are anonymous. They will be kept confidential and stored securely. You will at no point be individually identifiable to anyone outside of the research team. You will not be contacted by anyone who does not work at TRL, and you will only be contacted by TRL if you provide permission. You are free to stop the survey at any time if you do not wish to continue.

How long will it take? Most people take around 20 minutes to complete the survey.

How long will the survey be available for? The survey will close on 23rd February 2015.

Is there an incentive for taking part? For each completed survey, a £2 donation will be made to a charity of your choice (you will have 3 to choose from). You will also be able to enter a prize draw for:

- One of three iPad Air 2 tablets (worth £400 each)
- One of 12 cash payments of £100, or a £100 donation to a charity of your choice.

Will I have the opportunity to talk to someone to provide my opinion on this subject? TRL is also carrying out interviews as part of the research. Towards the end of the survey you will be asked if you would like to be contacted regarding taking part in an interview.

Who can I contact if I have any questions? If you require any further information please ask one of the researchers or you can contact TRL on HGVresearch@trl.co.uk

There are no right or wrong answers so please respond honestly. Please note, questions with a * require an answer.

CONSENT

Before we can begin the survey we need to check a few things with you. Please state whether you agree with the following statements by ticking the appropriate box:

	Yes	No
1. I have read and understood all of the information above (if you have any questions, please ask)		
2. I feel sufficiently informed as to the survey's purpose		
3. I am aware that I am free to withdraw from the survey at any time		

Please only continue with the survey if you ticked 'yes' for each statement.

For all questions, choose one response unless otherwise indicated.

ABOUT YOU

1. How often, on average, do you drive an HGV in London (inside the M25)?

₁ At least once a week ₃ Less than once a month

₂ At least once a month ₄ Never

2. What type of operator’s licence does the organisation you work for have?

₁ Standard (UK or international) (for carrying goods for other people for hire and reward)

₂ Restricted (for carrying own goods in the course of your trade and business - does not permit hire and reward)

₃ I currently work for organisations with both licence types

₄ I don’t know

3. What sector do you work in? (If you work in more than one of these sectors, please select the one of which you have most experience)

₁ Construction ₆ Agriculture

₂ Recycling/waste ₇ Wholesale

₃ General haulage and distribution ₈ Manufacturing

₄ Retail ₉ Public authorities

₅ Utilities ₁₀ Other (please specify):

4. Which of these best describes your current employment status?

₁ HGV driver – permanently employed by one operator

₂ HGV driver – self-employed with own HGV

₃ HGV driver – employed by an agency

₄ Other role in which I drive an HGV (i.e. I drive an HGV, but this is not the main part of my job)

5. If you are happy to, please briefly describe your job:

[Redacted]

6. Where is the organisation you work for based? (If there is more than one office/depot, please indicate the location of the head office)

₁ In London ₃ Outside the UK

₂ In the UK but not London ₄ I work for more than one organisation

7. Where do your HGV journeys which operate within London typically start?

₁ In London

₂ In the UK but not London

₃ Outside the UK

8. Do you know who your organisation’s Transport Manager/CPC Holder is/are?

₁ Yes

₂ No

₃ We don’t have one

9. When did you first get your HGV licence?

Year:

10. Thinking about your current job, which of these happened when you started? (Tick all that apply)

<input type="checkbox"/> ₁ Driving licence check	<input type="checkbox"/> ₄ CPC check
<input type="checkbox"/> ₂ In-cab driving assessment	<input type="checkbox"/> ₅ Assessment of your knowledge of drivers' hours/tachograph regulations
<input type="checkbox"/> ₃ Eyesight check	<input type="checkbox"/> ₅ Driver training specific to the job
	<input type="checkbox"/> ₇ <input type="checkbox"/> Other (please specify):

11. Do you currently work for an agency as an HGV driver?

No, I am not an agency driver (answer questions shaded **blue**, skip green)

Yes – I work for 1 agency

Yes – I work for 2 or more agencies

****Q12 and Q13 TO BE ANSWERED BY AGENCY DRIVERS ONLY****

12. How many different organisations do you currently work for as an HGV driver, through your agency/agencies?

1 (answer questions shaded **blue**, skip green)

2 or more (answer questions shaded **green**, skip blue)

13. Would you like to provide any additional information related to Q11 or 12?

ABOUT YOUR ORGANISATION

****Q14-20 TO BE ANSWERED BY NON-AGENCY DRIVERS AND AGENCY DRIVERS WORKING FOR 1 ORGANISATION ONLY****

14. How many HGVs are on your organisation's fleet? (If you don't know but have a rough idea, please estimate)

<input type="checkbox"/> ₁ 1-9	<input type="checkbox"/> ₄ 250+
<input type="checkbox"/> ₂ 10-49	<input type="checkbox"/> ₅ Don't know
<input type="checkbox"/> ₃ 50-249	

15. What type(s) of HGV(s) are on your organisation's fleet? (Tick all that apply)

<input type="checkbox"/> ₁ Box van	<input type="checkbox"/> ₈ Insulated van	<input type="checkbox"/> ₁₅ Special purpose
<input type="checkbox"/> ₂ Car transporter	<input type="checkbox"/> ₉ Livestock carrier	<input type="checkbox"/> ₁₆ Specially fitted van
<input type="checkbox"/> ₃ Concrete mixer	<input type="checkbox"/> ₁₀ Luton van	<input type="checkbox"/> ₁₇ Street cleansing
<input type="checkbox"/> ₄ Curtain sided	<input type="checkbox"/> ₁₁ Panel van	<input type="checkbox"/> ₁₈ Tanker
<input type="checkbox"/> ₅ Dropside lorry	<input type="checkbox"/> ₁₂ Refuse disposal	<input type="checkbox"/> ₁₉ Tipper
<input type="checkbox"/> ₆ Flat lorry	<input type="checkbox"/> ₁₃ Skeletal vehicle	<input type="checkbox"/> ₂₀ Tower wagon
<input type="checkbox"/> ₇ Goods	<input type="checkbox"/> ₁₄ Skip loader	<input type="checkbox"/> ₂₁ Tractor
<input type="checkbox"/> ₂₂ Don't know	<input type="checkbox"/> ₂₃ Other (please specify):	

16. How many of those HGVs operate in London on a regular basis (at least once a month)?

<input type="checkbox"/> ₁ All of them	<input type="checkbox"/> ₃ Less than half of them
<input type="checkbox"/> ₂ Half of them	<input type="checkbox"/> ₄ Don't know

17. How many employees does your organisation have? (not including any agency staff)

<input type="checkbox"/> ₁ Up to 5	<input type="checkbox"/> ₅ 51-100
<input type="checkbox"/> ₂ 6-10	<input type="checkbox"/> ₆ 101-250
<input type="checkbox"/> ₃ 11-25	<input type="checkbox"/> ₇ 251+
<input type="checkbox"/> ₄ 26-50	<input type="checkbox"/> ₈ Don't know

18. What percentage of the employees regularly drive an HGV? (not including any agency staff)

<input type="checkbox"/> 1 Up to 10%	<input type="checkbox"/> 4 51-75%
<input type="checkbox"/> 2 11-25%	<input type="checkbox"/> 5 76-100%
<input type="checkbox"/> 3 26-50%	<input type="checkbox"/> 6 Don't know

19. What type of drivers does your organisation employ? (Tick all that apply)

<input type="checkbox"/> 1 Company drivers	<input type="checkbox"/> 4 Independent owner-drivers
<input type="checkbox"/> 2 Short-term agency drivers (under 3 months)	<input type="checkbox"/> 5 Don't know
<input type="checkbox"/> 3 Long-term agency drivers (3 months +)	

20. Does your organisation use specific drivers for driving HGVs in London, avoiding sending certain drivers (e.g. less experienced) to London?

<input type="checkbox"/> 1 Yes - always	<input type="checkbox"/> 3 No
<input type="checkbox"/> 2 Yes - sometimes/when possible	<input type="checkbox"/> 4 Don't know

****Q21-22 TO BE ANSWERED BY AGENCY DRIVERS WORKING FOR 2 OR MORE ORGANISATIONS ONLY****

21. In general, how many HGVs are in the fleets of the organisations you tend to work for? (If you don't know but have a rough idea, please estimate)

<input type="checkbox"/> 1 1-9	<input type="checkbox"/> 4 250+
<input type="checkbox"/> 2 10-49	<input type="checkbox"/> 5 Don't know
<input type="checkbox"/> 3 50-249	

22. What type(s) of HGVs are on the fleets of the organisations you tend to work for? (Tick all that apply)

<input type="checkbox"/> 1 Box van	<input type="checkbox"/> 8 Insulated van	<input type="checkbox"/> 15 Special purpose
<input type="checkbox"/> 2 Car transporter	<input type="checkbox"/> 9 Livestock carrier	<input type="checkbox"/> 16 Specially fitted van
<input type="checkbox"/> 3 Concrete mixer	<input type="checkbox"/> 10 Luton van	<input type="checkbox"/> 17 Street cleansing
<input type="checkbox"/> 4 Curtain sided	<input type="checkbox"/> 11 Panel van	<input type="checkbox"/> 18 Tanker
<input type="checkbox"/> 5 Dropside lorry	<input type="checkbox"/> 12 Refuse disposal	<input type="checkbox"/> 19 Tipper
<input type="checkbox"/> 6 Flat lorry	<input type="checkbox"/> 13 Skeletal vehicle	<input type="checkbox"/> 20 Tower wagon
<input type="checkbox"/> 7 Goods	<input type="checkbox"/> 14 Skip loader	<input type="checkbox"/> 21 Tractor
<input type="checkbox"/> 22 Don't know	<input type="checkbox"/> 23 Other (please specify):	

****ALL DRIVERS****

23. Do you feel that agency drivers are seen differently to non-agency drivers in your industry?

<input type="checkbox"/> 1 No
<input type="checkbox"/> 2 Yes - please explain how:

YOUR VIEWS ON COMPLIANCE

24. Which of the following statements comes closest to your own views about non-compliance with HGV regulations?

1 Non-compliance is ALWAYS ok (skip Q25)

2 Non-compliance is MOSTLY ok, depending on the circumstances (answer Q25)

3 Non-compliance is OCCASIONALLY ok, depending on the circumstances (answer Q25)

4 Not complying is NEVER ok (skip Q25)

5 Don't know/none of the above (skip Q25)

****Q25 TO BE ANSWERED BY THOSE RESPONDING 'MOSTLY OK' OR 'OCCASIONALLY OK' TO Q24 ONLY****

25. Under what circumstances do you think not complying would be acceptable?

26. Do you think that HGV regulatory non-compliance in London is...?

1 Not a problem at all

2 A small problem

3 A moderate problem

4 A big problem

5 Don't know

27. How important do YOU think it is to make sure...	Not at all important					Not very important					Neither important nor unimportant					Quite important					Very important				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
a) Operators are compliant? (e.g. correct type of licence)	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
b) Transport managers are compliant? (e.g. correct CPC where required)	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

28. In your opinion, how important does YOUR ORGANISATION think it is to make sure...	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
a) Operators are compliant? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Transport managers are compliant? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

29. In your opinion, how important do ORGANISATIONS WHICH OPERATE HGVs in London generally think it is to make sure...	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
a) Operators are compliant? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Transport managers are compliant? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

30. Who do you think should be responsible for ensuring that... (Tick all that apply)								
	Clients	Company owners/directors	Transport managers/ CPC holders	Fleet/health and safety managers	Drivers' line managers	Drivers	Enforcement agencies	Don't know
a) Operators are compliant? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
b) Transport managers are compliant? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>

31. Are you aware of YOUR responsibilities with regards to...				
	Not aware	Partly aware	Fully aware	Not applicable
a) Operator compliance? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
b) Transport manager compliance? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
c) Vehicle compliance? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
d) Driver compliance? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
e) Delivery compliance? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
f) General driving compliance? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

32. Are you aware of YOUR EMPLOYER'S responsibilities with regards to...			
	Not aware	Partly aware	Fully aware
a) Operator compliance? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
b) Transport manager compliance? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
c) Vehicle compliance? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
d) Driver compliance? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
e) Delivery compliance? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
f) General driving compliance? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>

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33. Please state how much you agree or disagree with the following statements:	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) Organisations/operators can easily get away with not being compliant	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Drivers can easily get away with not being compliant	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

34. Please state how much you agree or disagree with the following statements: When HGV operations are compliant...	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) It helps the organisation win work	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) It saves the organisation money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) It benefits the environment (e.g. air quality)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) It makes drivers and vehicles safer on the road	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) It reduces the risk of being involved in an accident	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) It can be used as a marketing tool	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g) It reduces the amount of stress/pressure placed on managers	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
h) It costs the organisation money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i) It reduces the risk of being checked by enforcement agencies (e.g. DVSA)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
j) It increases productivity	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

35. Are there any other advantages or disadvantages of fully compliant HGV operations? Please describe:

36. Please state how much you agree or disagree with the following statements: When HGV operations are NOT compliant...	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) It helps the organisation win work	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) It saves the organisation money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) It reduces the amount of stress/pressure placed on managers	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) It costs the organisation money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) It increases productivity	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) It improves driver availability (e.g. if CPC training is not kept up to date)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g) Drivers are able to earn more money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
h) It results in bad publicity for the organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i) It affects the reputation of the organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
j) There is a negative impact on the organisation's credit record	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
k) It makes it difficult for the organisation to expand	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
l) There would be financial penalties	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
m) Enforcement agencies would keep an eye on the organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
n) The organisation would go out of business	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
o) Employees could be given a prison sentence	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

37. Are there any other advantages or disadvantages of HGV operations NOT being fully compliant? Please describe:

38. Please indicate how often you do each of these behaviours YOURSELF:

	Every day that I'm working in London	Most days that I'm working in London	About half the days that I'm working in London	Less than half the days that I'm working in London	Very rarely	Never
a) Driving an HGV without being fully trained to do so	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
b) Speeding when driving an HGV	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
c) Not complying with congestion charges and other access charges	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
d) Not complying with tachograph and driver hours regulations	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
e) Operators/drivers carrying goods for other people when they're not legally allowed to	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
f) Driving a vehicle fuelled by red diesel	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
g) Not wearing a seatbelt when driving an HGV	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
h) Not complying with restricted hours (e.g. London Lorry Control Scheme)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
i) Not carrying out daily walkaround vehicle checks	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
j) Drivers being asked to work beyond their legal driving hours limit	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
k) Not complying with Low Emission Zone regulations	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
l) Driving a vehicle which is known to be overloaded	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

m) Using a handheld device such as a mobile phone, smartphone or tablet while driving a vehicle	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
n) Not complying with pavement restrictions (e.g. Borough loading and unloading restrictions)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
o) Not complying with restricted road rules (e.g. Red Routes)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

39. Please indicate how often you see/hear of OTHERS doing each of these:

	Every day that I'm working in London	Most days that I'm working in London	About half the days that I'm working in London	Less than half the days that I'm working in London	Very rarely	Never
a) Driving an HGV without being fully trained to do so	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
b) Speeding when driving an HGV	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
c) Not complying with congestion charges and other access charges	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
d) Not complying with tachograph and driver hours regulations	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
e) Operators/drivers carrying goods for other people when they're not legally allowed to	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
f) Driving a vehicle fuelled by red diesel	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
g) Not wearing a seatbelt when driving an HGV	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
h) Not complying with restricted hours (e.g. London Lorry Control Scheme)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
i) Not carrying out daily walkaround vehicle checks	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

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j) Drivers being asked to work beyond their legal driving hours limit	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
k) Not complying with Low Emission Zones regulations	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
l) Driving a vehicle which is known to be overloaded	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
m) Using a handheld device such as a mobile phone, smartphone or tablet while driving a vehicle	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
n) Not complying with pavement restrictions (e.g. Borough loading and unloading restrictions)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
o) Not complying with restricted road rules (e.g. Red Routes)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

40. What effect, if any, do you think the following practices have on general compliance?	Completely encourages compliance	Somewhat encourages compliance	Has no effect on compliance	Somewhat encourages NON-compliance	Completely encourages NON-compliance	Don't know
a) Use of productivity-related incentives/bonuses	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
b) Use of incentives/bonuses for fuel economy	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
c) Use of incentives/bonuses for accident-free driving	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
d) Strict timeslots for delivery	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
e) Pay per load	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
f) Job and finish	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

41. Please state how much you agree or disagree with the following statement: The rules and regulations associated with operating an HGV in London are too complicated

- 1 Strongly disagree
- 2 Disagree
- 3 Neither agree nor disagree
- 4 Agree
- 5 Strongly agree

Please explain why you think this:

42. How good do you think your knowledge is of the rules and regulations associated with the HGV industry relating to...

	Very poor	Quite poor	Average	Quite good	Very good
a) Operating HGVs in London	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Roadworthiness of HGVs	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Driving HGVs in London	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

43. How good do you think your knowledge is of the legal consequences for YOURSELF and YOUR EMPLOYER if you do not comply with all rules and regulations?

	Very poor	Quite poor	Average	Quite good	Very good
a) Knowledge of consequences for yourself	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Knowledge of consequences for your employer	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

44. To what extent do you agree or disagree that targeted compliance checks...

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) Help improve road safety?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Generate revenue for the police/Government?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Are an effective means of encouraging compliance?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

45. How does London compare to the rest of the UK in terms of how easy or difficult it is to comply with regulations for HGV operations?

1 Much harder than the rest of the UK

2 A little harder than the rest of the UK

3 Same as the rest of the UK

4 A little easier than the rest of the UK

5 Much easier than the rest of the UK

Please explain why you think this:

46. If you needed information or advice on a compliance-related issue, would you know where to go (either within your organisation or externally)?

1 No

2 Yes – please describe:

47. Which of these have you used or would consider using to find information or advice on a compliance-related issue?

	I have used this and would use it again	I have used this but WOULD NOT use it again	I have not used this but WOULD CONSIDER using it	I have not used this and WOULD NOT CONSIDER using it
a) FTA website/helpline/guidance	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
b) RHA website/helpline/guidance	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
c) Google/internet search	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
d) Trade press (e.g. Commercial Motor, Truck & Driver)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
e) TfL website/helpline/guidance (e.g. 'Operating in London')	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
f) Ask a manager within your organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
g) Ask a colleague or other contact in the industry	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
h) Go to your Trade Union	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
i) Other (please describe):				

REPORTING NON-COMPLIANCE

48. Have you reported any non-compliance issues in London over the last year?

- Yes - I reported non-compliance that I saw within my organisation (answer orange, skip purple)
- Yes - I reported non-compliance that I saw in another organisation (answer orange, skip purple)
- No - I have seen non-compliance within my organisation but did not report it (answer purple, skip orange)
- No - I have seen non-compliance in another organisation but did not report it (answer purple, skip orange)
- No - I have not seen any non-compliance in London in the last year (skip orange and purple)

****Q49-50 TO BE ANSWERED BY THOSE WHO RESPONDED 'YES' TO Q48 ONLY****

49. How did you report the non-compliance issue?

- Internally (e.g. to management in my organisation)
- Externally (e.g. to DVSA (VOSA))

Please provide any additional information relating to how you reported the non-compliance issue:

50. What happened when you reported the non-compliance issue? (Tick all that apply)

- It was dealt with immediately
- It was dealt with appropriately
- I was given feedback on how the issue was dealt with
- It was not dealt with
- Other (please specify):

****Q51 TO BE ANSWERED BY THOSE WHO RESPONDED 'NO – I HAVE SEEN NON-COMPLIANCE BUT DID NOT REPORT IT' TO Q48 ONLY****

51. Why didn't you report the non-compliance issue? (Tick all that apply)

- I didn't think it was important enough to report
- It was none of my business
- There is no system through which to report non-compliance
- I didn't want to be seen as a 'whistleblower'
- I didn't want to cause trouble for my colleagues
- Everyone makes mistakes
- Other (please specify):

****Q52-Q54 TO BE ANSWERED BY NON-AGENCY DRIVERS AND AGENCY DRIVERS WORKING FOR 1 ORGANISATION ONLY****

52. Please state how much you agree or disagree with the following statements:	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) All staff are strongly encouraged to report non-compliance	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) In general, some compliance rules and procedures do not need to be followed to get the job done safely	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Some compliance rules and procedures related to VEHICLES do not need to be followed to get the job done	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) This is to check you are reading the questions. Please choose the 'strongly agree' response for this question	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) Some compliance rules and procedures related to DRIVERS do not need to be followed to get the job done safely	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) Management acts decisively when a compliance concern has been raised internally	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g) Management acts decisively when a compliance concern has been raised by an external agency/organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
h) There is good communication in my organisation about compliance issues which affect me	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i) I can influence levels of compliance in my organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

53. Which of these statements best describes YOUR ORGANISATION'S attitude to compliance?

1 "Nobody cares as long as we're not caught"

2 "We do something every time there's a problem"

3 "There are systems in place to ensure compliance"

4 "We always try to improve compliance"

5 "Compliance is a key priority"

54. Does your organisation have a system or procedure in place for reporting non-compliance?

1 No

2 Don't know

3 Yes (please describe):

60. How likely do you think drivers in London are to get checked by...	Not at all likely	Not very likely	Neither likely nor unlikely	Quite likely	Very likely	Don't know
a) DVSA (VOSA)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
b) The police	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
c) Borough enforcement officers	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
d) The Industrial HGV Task Force	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
e) Border Force	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
f) HMRC Road Fuel Testing Unit	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

61. Have you ever been disqualified from driving?

1 Yes

2 No

3 Prefer not to say

62. How do you think compliance with HGV-related rules and regulations in London could be improved?

63. If you have any additional comments, please include them here:

64. Where did you first hear about this survey?

1 <input type="checkbox"/> Email from TRL	6 <input type="checkbox"/> SMMT bulletin
2 <input type="checkbox"/> Twitter	7 <input type="checkbox"/> DVSA bulletin
3 <input type="checkbox"/> Friend/colleague	8 <input type="checkbox"/> FORS application page
4 <input type="checkbox"/> Email from FTA/RHA/MPA etc	9 <input type="checkbox"/> Internet forum
5 <input type="checkbox"/> CILT bulletin	10 <input type="checkbox"/> Other (please specify)

65. For each fully completed survey we will donate £2 to one of the following charities. Please indicate which charity you would like to benefit from the completion of this survey.

₁ LIGHTHOUSE CLUB – providing financial aid, advice, emotional and legal support to the construction industry and their families in times of hardship and stress.

₂ TRANSAID – an international development charity which implements local transport solutions to improve access to basic services in Africa and developing countries, combining the expertise of the European Transport and Logistics industry with their experience of working in the developing world.

₃ RAILWAY CHILDREN – an international children’s charity for vulnerable children living alone on the streets in the UK, India and East Africa.

66. Would you like to be entered into the prize draw to have the chance to win:

- One of 3 iPad Air 2 tablets or
- One of 12 cash prizes of £100?

₁ Yes

₂ No

If you select 'yes' and are a winner, we will contact you to let you know. Please provide an email address or phone number. This information will not be used for any other purpose:

Contact details: _____

As part of this research, TRL is also carrying out telephone interviews with various members of the HGV industry. Those taking part in an interview will have the choice of receiving a £50 Amazon voucher, or a £50 donation to one of the three charities (Lighthouse Club, Transaid or Railway Children).

Would you be interested in receiving more information on this? If so, please provide an email address that we can contact you on. This information will not be used for any other purpose:

Email: _____

You have completed this survey! Thank you for taking the time to answer this survey! Your responses will help us to understand HGV operations in London and make recommendations for improvements.

MANAGER/OWNER SURVEY

What is the purpose of this survey? This research is looking at HGV operations in London, with the aim of improving the safety of HGVs (i.e. vehicles of 3.5 tonnes or over), HGV drivers and other road users.

Who is conducting the research? This research is being carried out by TRL (the Transport Research Laboratory) on behalf of Transport for London.

Will my answers be confidential? All of your responses are anonymous. They will be kept confidential and stored securely. You will at no point be individually identifiable to anyone outside of the research team. You will not be contacted by anyone who does not work at TRL, and you will only be contacted by TRL if you provide permission. You are free to stop the survey at any time if you do not wish to continue.

How long will it take? Most people take around 20 minutes to complete the survey.

How long will the survey be available for? The survey will close on 23rd February 2015.

Is there an incentive for taking part? For each completed survey, a £2 donation will be made to a charity of your choice (you will have 3 to choose from). You will also be able to enter a prize draw for:

- One of three iPad Air 2 tablets (worth £400 each)
- One of 12 cash payments of £100, or a £100 donation to a charity of your choice.

Will I have the opportunity to talk to someone to provide my opinion on this subject? TRL is also carrying out interviews as part of

the research. Towards the end of the survey you will be asked if you would like to be contacted regarding taking part in an interview.

Who can I contact if I have any questions? If you require any further information please ask one of the researchers or you can contact TRL on HGVresearch@trl.co.uk

There are no right or wrong answers so please respond honestly. Please note, questions with a * require an answer.

CONSENT

Before we can begin the survey we need to check a few things with you. Please state whether you agree with the following statements by ticking the appropriate box:

	Yes	No
1. I have read and understood all of the information above (if you have any questions, please ask)		
2. I feel sufficiently informed as to the survey's purpose		
3. I am aware that I am free to withdraw from the survey at any time		

Please only continue with the survey if you ticked 'yes' for each statement.

For all questions, choose one response unless otherwise indicated.

ABOUT YOU

1. How often, on average, do your organisation's HGVs operate in London (inside the M25)?

<input type="checkbox"/> ₁ At least once a week	<input type="checkbox"/> ₃ Less than once a month
<input type="checkbox"/> ₂ At least once a month	<input type="checkbox"/> ₄ Never
<input type="checkbox"/> ₅ Don't know	

2. What type of operator's licence does your organisation have?

<input type="checkbox"/> ₁ Standard (UK or international) (for carrying goods for other people for hire and reward)
<input type="checkbox"/> ₂ Restricted (for carrying own goods in the course of your trade and business - does not permit hire and reward)
<input type="checkbox"/> ₃ I don't know

3. What sector do you work in? (If you currently work in more than one of these sectors, please select the one of which you have most experience)

<input type="checkbox"/> ₁ Construction	<input type="checkbox"/> ₆ Agriculture
<input type="checkbox"/> ₂ Recycling/waste	<input type="checkbox"/> ₇ Wholesale
<input type="checkbox"/> ₃ General haulage and distribution	<input type="checkbox"/> ₈ Manufacturing
<input type="checkbox"/> ₄ Retail	<input type="checkbox"/> ₉ Public authorities
<input type="checkbox"/> ₅ Utilities	<input type="checkbox"/> ₁₀ Other (please specify):
	<input type="checkbox"/>

4. Which of these best describes your main role?

<input type="checkbox"/> ₁ Transport manager
<input type="checkbox"/> ₂ Fleet manager
<input type="checkbox"/> ₃ Line manager with responsibility for HGV driver(s)
<input type="checkbox"/> ₄ Health and safety manager
<input type="checkbox"/> ₅ Other (please specify):

5. If you are happy to, please briefly describe your job:

6. Where is the organisation you work for based? (If there is more than one office/depot, please indicate the location of the head office)

<input type="checkbox"/> ₁ In London	<input type="checkbox"/> ₃ Outside the UK
<input type="checkbox"/> ₂ In the UK but not London	

7. Where do your organisation's HGV journeys which operate within London typically start?

<input type="checkbox"/> ₁ In London	<input type="checkbox"/> ₃ Outside the UK
<input type="checkbox"/> ₂ In the UK but not London	

8. Do you know who your organisation's Transport Manager/CPC Holder is/are?

<input type="checkbox"/> ₁ Yes - I am the nominated CPC holder
<input type="checkbox"/> ₂ Yes - someone else in the organisation is the nominated CPC holder
<input type="checkbox"/> ₃ Yes - this role is outsourced
<input type="checkbox"/> ₄ There is no nominated CPC holder
<input type="checkbox"/> ₅ I don't know if there is a nominated CPC holder/who it is

ABOUT YOUR ORGANISATION

9. How many HGVs are on your organisation's fleet? (If you don't know but have a rough idea, please estimate)

<input type="checkbox"/> ₁ 1-9	<input type="checkbox"/> ₄ 250+
<input type="checkbox"/> ₂ 10-49	<input type="checkbox"/> ₅ Don't know
<input type="checkbox"/> ₃ 50-249	

10. What type(s) of HGV(s) are on your organisation's fleet? (Tick all that apply)

<input type="checkbox"/> 1 Box van	<input type="checkbox"/> 8 Insulated van	<input type="checkbox"/> 15 Special purpose
<input type="checkbox"/> 2 Car transporter	<input type="checkbox"/> 9 Livestock carrier	<input type="checkbox"/> 16 Specially fitted van
<input type="checkbox"/> 3 Concrete mixer	<input type="checkbox"/> 10 Luton van	<input type="checkbox"/> 17 Street cleansing
<input type="checkbox"/> 4 Curtain sided	<input type="checkbox"/> 11 Panel van	<input type="checkbox"/> 18 Tanker
<input type="checkbox"/> 5 Dropside lorry	<input type="checkbox"/> 12 Refuse disposal	<input type="checkbox"/> 19 Tipper
<input type="checkbox"/> 6 Flat lorry	<input type="checkbox"/> 13 Skeletal vehicle	<input type="checkbox"/> 20 Tower wagon
<input type="checkbox"/> 7 Goods	<input type="checkbox"/> 14 Skip loader	<input type="checkbox"/> 21 Tractor
<input type="checkbox"/> 22 Don't know	<input type="checkbox"/> 23 Other (please specify):	

11. How many of those HGVs operate in London on a regular basis (at least once a month)?

<input type="checkbox"/> 1 All of them	<input type="checkbox"/> 3 Less than half of them
<input type="checkbox"/> 2 Half of them	<input type="checkbox"/> 4 Don't know

12. How many employees does your organisation have? (not including any agency staff)

<input type="checkbox"/> 1 Up to 5	<input type="checkbox"/> 5 51-100
<input type="checkbox"/> 2 6-10	<input type="checkbox"/> 6 101-250
<input type="checkbox"/> 3 11-25	<input type="checkbox"/> 7 251+
<input type="checkbox"/> 4 26-50	<input type="checkbox"/> 8 Don't know

13. What percentage of the employees regularly drive an HGV? (not including any agency staff)

<input type="checkbox"/> 1 Up to 10%	<input type="checkbox"/> 4 51-75%
<input type="checkbox"/> 2 11-25%	<input type="checkbox"/> 5 76-100%
<input type="checkbox"/> 3 26-50%	<input type="checkbox"/> 6 Don't know

14. What type of drivers does your organisation employ? (Tick all that apply)

<input type="checkbox"/> 1 Company drivers	<input type="checkbox"/> 4 Independent owner-drivers
<input type="checkbox"/> 2 Short-term agency drivers (under 3 months)	<input type="checkbox"/> 5 Don't know
<input type="checkbox"/> 3 Long-term agency drivers (3 months +)	

15. Does your organisation use specific drivers for driving HGVs in London, avoiding sending certain drivers (e.g. less experienced) to London?

<input type="checkbox"/> 1 Yes - always	<input type="checkbox"/> 3 No
<input type="checkbox"/> 2 Yes - sometimes/when possible	<input type="checkbox"/> 4 Don't know

16. Do you feel that agency drivers are seen differently to non-agency drivers in your industry?

<input type="checkbox"/> 1 No
<input type="checkbox"/> 2 Yes - please explain how:

YOUR VIEWS ON COMPLIANCE

17. Which of the following statements comes closest to your own views about non-compliance with HGV regulations?

1 Non-compliance is ALWAYS ok (skip Q25)

2 Non-compliance is MOSTLY ok, depending on the circumstances (answer Q25)

3 Non-compliance is OCCASIONALLY ok, depending on the circumstances (answer Q25)

4 Not complying is NEVER ok (skip Q25)

5 Don't know/none of the above (skip Q25)

****Q18 TO BE ANSWERED BY THOSE RESPONDING 'MOSTLY OK' OR 'OCCASIONALLY OK' TO Q24 ONLY****

18. Under what circumstances do you think not complying would be acceptable?

19. Do you think that HGV regulatory non-compliance in London is...?

1 Not a problem at all

2 A small problem

3 A moderate problem

4 A big problem

5 Don't know

20. How important do YOU think it is for HGV operations to comply with legal requirements IN GENERAL?

1 Not at all important

2 Not very important

3 Neither important nor unimportant

4 Quite important

5 Very important

21. How important do YOU think it is to make sure...

	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
a) Operators are compliant? (e.g. correct type of licence)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
b) Transport managers are compliant? (e.g. correct CPC where required)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

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22. In your opinion, how important does YOUR ORGANISATION think it is to make sure...	Importance scale				
	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
a) Operators are compliant? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Transport managers are compliant? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

23. In your opinion, how important do ORGANISATIONS WHICH OPERATE HGVs in London generally think it is to make sure...	Importance scale				
	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
a) Operators are compliant? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Transport managers are compliant? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

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24. Who do you think should be responsible for ensuring that... (Tick all that apply)								
	Clients	Company owners/directors	Transport managers/ CPC holders	Fleet/health and safety managers	Drivers' line managers	Drivers	Enforcement agencies	Don't know
a) Operators are compliant? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
b) Transport managers are compliant? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>

25. Are you aware of YOUR responsibilities with regards to...				
	Not aware	Partly aware	Fully aware	Not applicable
a) Operator compliance? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
b) Transport manager compliance? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
c) Vehicle compliance? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
d) Driver compliance? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
e) Delivery compliance? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
f) General driving compliance? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

26. Are drivers in your organisation made aware of their responsibilities with regards to...	Yes		No		Don't know		Not applicable	
	1	2	3	4	1	2	3	4
a) Operator compliance? (e.g. correct type of licence)	<input type="checkbox"/>							
b) Transport manager compliance? (e.g. correct CPC where required)	<input type="checkbox"/>							
c) Vehicle compliance? (e.g. daily walkaround checks are completed, loads are properly secured)	<input type="checkbox"/>							
d) Driver compliance? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	<input type="checkbox"/>							
e) Delivery compliance? (e.g. parking restrictions adhered to)	<input type="checkbox"/>							
f) General driving compliance? (e.g. seatbelt, not speeding, not using mobile phone)	<input type="checkbox"/>							

27. Please state how much you agree or disagree with the following statements:	Strongly disagree		Disagree		Neither agree nor disagree		Agree		Strongly agree	
	1	2	3	4	5	1	2	3	4	5
a) Organisations/operators can easily get away with not being compliant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
b) Drivers can easily get away with not being compliant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

28. Please state how much you agree or disagree with the following statements: When HGV operations are compliant...	Strongly disagree		Disagree		Neither agree nor disagree		Agree		Strongly agree	
	1	2	3	4	5	1	2	3	4	5
a) It helps the organisation win work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
b) It saves the organisation money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
c) It benefits the environment (e.g. air quality)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
d) It makes drivers and vehicles safer on the road	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
e) It reduces the risk of being involved in an accident	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
f) It can be used as a marketing tool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
g) It reduces the amount of stress/pressure placed on managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
h) It costs the organisation money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
i) It reduces the risk of being checked by enforcement agencies (e.g. DVSA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
j) It increases productivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

29. Are there any other advantages or disadvantages of fully compliant HGV operations? Please describe:

30. Please state how much you agree or disagree with the following statements: When HGV operations are NOT compliant...	Strongly disagree		Disagree		Neither agree nor disagree		Agree		Strongly agree	
	1	2	3	4	5	6	7	8	9	10
a) It helps the organisation win work	1	2	3	4	5					
b) It saves the organisation money	1	2	3	4	5					
c) It reduces the amount of stress/pressure placed on managers	1	2	3	4	5					
d) It costs the organisation money	1	2	3	4	5					
e) It increases productivity	1	2	3	4	5					
f) It improves driver availability (e.g. if CPC training is not kept up to date)	1	2	3	4	5					
g) Drivers are able to earn more money	1	2	3	4	5					
h) It results in bad publicity for the organisation	1	2	3	4	5					
i) It affects the reputation of the organisation	1	2	3	4	5					
j) There is a negative impact on the organisation's credit record	1	2	3	4	5					
k) It makes it difficult for the organisation to expand	1	2	3	4	5					
l) There would be financial penalties	1	2	3	4	5					
m) Enforcement agencies would keep an eye on the organisation	1	2	3	4	5					
n) The organisation would go out of business	1	2	3	4	5					
o) Employees could be given a prison sentence	1	2	3	4	5					

31. Are there any other advantages or disadvantages of HGV operations NOT being fully compliant? Please describe:

32. Please indicate how often you believe each behaviour happens in your organisation	Every day		Most days		About half the time		Less than half the time		Very rarely		Never	
	1	2	3	4	5	6	7	8	9	10	11	12
a) Driving an HGV without being fully trained to do so	1	2	3	4	5	6						
b) Speeding when driving an HGV	1	2	3	4	5	6						
c) Not complying with congestion charges and other access charges	1	2	3	4	5	6						
d) Not complying with tachograph and driver hours regulations	1	2	3	4	5	6						
e) Operators/drivers carrying goods for other people when they're not legally allowed to	1	2	3	4	5	6						
f) Driving a vehicle fuelled by red diesel	1	2	3	4	5	6						
g) Not wearing a seatbelt when driving an HGV	1	2	3	4	5	6						
h) Not complying with restricted hours (e.g. London Lorry Control Scheme)	1	2	3	4	5	6						
i) Not carrying out daily walkaround vehicle checks	1	2	3	4	5	6						
j) Drivers being asked to work beyond their legal driving hours limit	1	2	3	4	5	6						
k) Not complying with Low Emission Zone regulations	1	2	3	4	5	6						
l) Driving a vehicle which is known to be overloaded	1	2	3	4	5	6						
m) Using a handheld device such as a mobile phone, smartphone or tablet while driving a vehicle	1	2	3	4	5	6						
n) Not complying with pavement restrictions (e.g. Borough loading and unloading restrictions)	1	2	3	4	5	6						
o) Not complying with restricted road rules (e.g. Red Routes)	1	2	3	4	5	6						

33. Please indicate how often you see or hear of OTHER ORGANISATIONS doing each of these:						
	Every day	Most days	About half the time	Less than half the time	Very rarely	Never
a) Driving an HGV without being fully trained to do so	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
b) Speeding when driving an HGV	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
c) Not complying with congestion charges and other access charges	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
d) Not complying with tachograph and driver hours regulations	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
e) Operators/drivers carrying goods for other people when they're not legally allowed to	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
f) Driving a vehicle fuelled by red diesel	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
g) Not wearing a seatbelt when driving an HGV	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
h) Not complying with restricted hours (e.g. London Lorry Control Scheme)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
i) Not carrying out daily walkaround vehicle checks	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
j) Drivers being asked to work beyond their legal driving hours limit	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
k) Not complying with Low Emission Zones regulations	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
l) Driving a vehicle which is known to be overloaded	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
m) Using a handheld device such as a mobile phone, smartphone or tablet while driving a vehicle	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
n) Not complying with pavement restrictions (e.g. Borough loading and unloading restrictions)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
o) Not complying with restricted road rules (e.g. Red Routes)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

34. What effect, if any, do you think the following practices have on general compliance?						
	Completely encourages compliance	Somewhat encourages compliance	Has no effect on compliance	Somewhat encourages NON-compliance	Completely encourages NON-compliance	Don't know
a) Use of productivity-related incentives/bonuses	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
b) Use of incentives/bonuses for fuel economy	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
c) Use of incentives/bonuses for accident-free driving	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
d) Strict timeslots for delivery	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
e) Pay per load	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
f) Job and finish	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

35. Please state how much you agree or disagree with the following statement: The rules and regulations associated with operating an HGV in London are too complicated

1 Strongly disagree

2 Disagree

3 Neither agree nor disagree

4 Agree

5 Strongly agree

Please explain why you think this:

36. How good do you think your knowledge is of the rules and regulations associated with the HGV industry relating to...

	Very poor	Quite poor	Average	Quite good	Very good
a) Operating HGVs in London	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Roadworthiness of HGVs	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Driving HGVs in London	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

37. How good do you think your knowledge is of the legal consequences for YOUR ORGANISATION if you do not comply with all rules and regulations?

	Very poor	Quite poor	Average	Quite good	Very good
a) Knowledge of consequences for yourself	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Knowledge of consequences for your organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

38. How much do you agree or disagree that your organisation or the CPC holder does the following:

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) Observe the laws relating to the driving and operation of vehicles	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Ensure compliance with driver licensing rules	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Ensure compliance with drivers' hours rules and tachograph regulations	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) Ensure vehicles are not overloaded	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) Ensure vehicles stay within speed limits	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) This is to check you are reading the questions. Please choose the 'strongly agree' response for this question	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g) Maintain vehicles in a fit and serviceable condition	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
h) Implement an effective vehicle defect walk round check and reporting system for drivers	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i) Keep all records for the required length of time	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
j) Notify any relevant changes to the Traffic Commissioner	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

39. To what extent do you agree or disagree that targeted compliance checks...

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) Help improve road safety?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Generate revenue for the police/Government?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Are an effective means of encouraging compliance?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

40. How does London compare to the rest of the UK in terms of how easy or difficult it is to comply with regulations for HGV operations?

- 1 Much harder than the rest of the UK
- 2 A little harder than the rest of the UK
- 3 Same as the rest of the UK
- 4 A little easier than the rest of the UK
- 5 Much easier than the rest of the UK

Please explain why you think this:

41. If you needed information or advice on a compliance-related issue, would you know where to go (either within your organisation or externally)?

- 1 No
- 2 Yes – please describe:

42. Which of these have you used or would consider using to find information or advice on a compliance-related issue?

	I have used this and would use it again	I have used this but WOULD NOT use it again	I have not used this but WOULD CONSIDER using it	I have not used this and WOULD NOT CONSIDER using it
a) FTA website/helpline/guidance	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
b) RHA website/helpline/guidance	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
c) Google/internet search	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
d) Trade press (e.g. Commercial Motor, Truck & Driver)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
e) TfL website/helpline/guidance (e.g. 'Operating in London')	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
f) Ask a manager within your organisation	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
g) Ask a colleague or other contact in the industry	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
h) Go to your Trade Union	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
i) Other (please describe):				

REPORTING NON-COMPLIANCE

43. Have you had any non-compliance issues reported to you over the last year?

- 1 Yes - someone within the organisation reported a non-compliance issue
- 2 Yes - someone from outside the organisation reported a non-compliance issue
- 3 No – I have not had any non-compliance issues reported to me over the last year

44. Have you reported any non-compliance issues in London over the last year?

- Yes - I reported non-compliance that I saw within my organisation (answer orange, skip purple)
- Yes - I reported non-compliance that I saw in another organisation (answer orange, skip purple)
- No - I have seen non-compliance within my organisation but did not report it (answer purple, skip orange)
- No - I have seen non-compliance in another organisation but did not report it (answer purple, skip orange)
- No - I have not seen any non-compliance in London in the last year (skip orange and purple)

****Q45-46 TO BE ANSWERED BY THOSE WHO RESPONDED 'YES' TO Q44 ONLY****

45. How did you report the non-compliance issue?

- Internally (e.g. to management in my organisation)
- Externally (e.g. to DVSA (VOSA))

Please provide any additional information relating to how you reported the non-compliance issue:

46. What happened when you reported the non-compliance issue? (Tick all that apply)

- It was dealt with immediately
- It was dealt with appropriately
- I was given feedback on how the issue was dealt with
- It was not dealt with
- Other (please specify):

****Q47 TO BE ANSWERED BY THOSE WHO RESPONDED 'NO – I HAVE SEEN NON-COMPLIANCE BUT DID NOT REPORT IT' TO Q44 ONLY****

47. Why didn't you report the non-compliance issue? (Tick all that apply)

- I didn't think it was important enough to report
- It was none of my business
- There is no system through which to report non-compliance
- I didn't want to be seen as a 'whistleblower'
- I didn't want to cause trouble for my colleagues
- Everyone makes mistakes
- Other (please specify):

48. Please state how much you agree or disagree with the following statements:	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) All staff are strongly encouraged to report non-compliance	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) In general, some compliance rules and procedures do not need to be followed to get the job done safely	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Some compliance rules and procedures related to VEHICLES do not need to be followed to get the job done	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) This is to check you are reading the questions. Please choose the 'strongly agree' response for this question	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) Some compliance rules and procedures related to DRIVERS do not need to be followed to get the job done safely	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) Management acts decisively when a compliance concern has been raised internally	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g) Management acts decisively when a compliance concern has been raised by an external agency/organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
h) Management feel able to deal appropriately with staff who have been found to be non-compliant	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i) There is good communication in my organisation about compliance issues which affect me	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
j) I can influence levels of compliance in my organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

****Q49 TO BE ANSWERED BY THOSE WHO EMPLOY AGENCY DRIVERS ONLY****

49. Please state how much you agree or disagree with the following statement:	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) Management feel able to deal appropriately with agency staff who have been found to be non-compliant	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

50. Which of these statements best describes YOUR ORGANISATION'S attitude to compliance?
1 <input type="checkbox"/> "Nobody cares as long as we're not caught"
2 <input type="checkbox"/> "We do something every time there's a problem"
3 <input type="checkbox"/> "There are systems in place to ensure compliance"
4 <input type="checkbox"/> "We always try to improve compliance"
5 <input type="checkbox"/> "Compliance is a key priority"

51. Does your organisation have a system or procedure in place for reporting non-compliance?
1 <input type="checkbox"/> No
2 <input type="checkbox"/> Don't know
3 <input type="checkbox"/> Yes (please describe):

DRIVER CPC TRAINING

52. Who pays for driver CPC training in your organisation?

- ₁ The driver pays
- ₂ The organisation pays
- ₃ Other (please specify):

53. Do your drivers complete the CPC training in their own time? (Non-agency drivers only)

- ₁ Yes, the drivers complete all of the CPC training in their own time
- ₂ The drivers complete some of the CPC training in their own time, and some during work time
- ₃ The drivers complete the CPC training during work time

54. Do you or your colleagues check drivers' tachograph records (including whether the record matches with the driver's duties)

- ₁ No
- ₂ Don't know
- ₃ Yes (please describe):

****Q55 and Q56 TO BE ANSWERED BY THOSE WHO EMPLOY AGENCY DRIVERS ONLY****

55. Do you or your colleagues check whether agency drivers have also been driving for other employers, and how this relates to the Drivers' Hours regulations?

- ₁ Yes
- ₂ No
- ₃ Don't know

56. If yes to Q55, please explain how the checks are carried out. If no to Q55, please explain why checks are not carried out.

FINAL QUESTIONS

57. Which of the following apply to you/your organisation...

FORS membership:

₁ Bronze ₂ Silver ₃ Gold

OCRS rating for roadworthiness:

₄ Red ₅ Amber ₆ Green

OCRS rating for traffic enforcement:

₇ Red ₈ Amber ₉ Green

Trade association membership:

₁₀ FTA ₁₁ RHA ₁₂ MPA

₁₃ Other trade association membership

₁₄ I have/my organisation has appeared in front of the traffic commissioner/at a public inquiry

58. How likely do you think drivers in London are to get checked by...

	Not at all likely	Not very likely	likely nor unlikely	Quite likely	Very likely	Don't know
g) DVSA (VOSA)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆
h) The police	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆
i) Borough enforcement officers	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆
j) The Industrial HGV Task Force	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆
k) Border Force	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆
l) HMRC Road Fuel Testing Unit	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆

59. How do you think compliance with HGV-related rules and regulations in London could be improved?

60. If you have any additional comments, please include them here:

61. Where did you first hear about this survey?

₁ Email from TRL

₂ Twitter

₃ Friend/colleague

₄ Email from FTA/RHA/MPA etc

₅ CILT bulletin

₆ SMMT bulletin

₇ DVSA bulletin

₈ FORS application page

₉ Internet forum

₁₀ Other (please specify)

62. For each fully completed survey we will donate £2 to one of the following charities. Please indicate which charity you would like to benefit from the completion of this survey.

₁ LIGHTHOUSE CLUB – providing financial aid, advice, emotional and legal support to the construction industry and their families in times of hardship and stress.

₂ TRANSAID – an international development charity which implements local transport solutions to improve access to basic services in Africa and developing countries, combining the expertise of the European Transport and Logistics industry with their experience of working in the developing world.

₃ RAILWAY CHILDREN – an international children’s charity for vulnerable children living alone on the streets in the UK, India and East Africa.

63. Would you like to be entered into the prize draw to have the chance to win:

- One of 3 iPad Air 2 tablets or
- One of 12 cash prizes of £100?

₁ Yes ₂ No

If you select 'yes' and are a winner, we will contact you to let you know. Please provide an email address or phone number. This information will not be used for any other purpose:

Contact details: _____

As part of this research, TRL is also carrying out telephone interviews with various members of the HGV industry. Those taking part in an interview will have the choice of receiving a £50 Amazon voucher, or a £50 donation to one of the three charities (Lighthouse Club, Transaid or Railway Children).

Would you be interested in receiving more information on this? If so, please provide an email address that we can contact you on. This information will not be used for any other purpose:

Email: _____

You have completed this survey! Thank you for taking the time to answer this survey! Your responses will help us to understand HGV operations in London and make recommendations for improvements.

CLIENT SURVEY

What is the purpose of this survey? This research is looking at HGV operations in London, with the aim of improving the safety of HGVs (i.e. vehicles of 3.5 tonnes or over), HGV drivers and other road users.

Who is conducting the research? This research is being carried out by TRL (the Transport Research Laboratory) on behalf of Transport for London.

Will my answers be confidential? All of your responses are anonymous. They will be kept confidential and stored securely. You will at no point be individually identifiable to anyone outside of the research team. You will not be contacted by anyone who does not work at TRL, and you will only be contacted by TRL if you provide permission. You are free to stop the survey at any time if you do not wish to continue.

How long will it take? Most people take around 20 minutes to complete the survey.

How long will the survey be available for? The survey will close on 23rd February 2015.

Is there an incentive for taking part? For each completed survey, a £2 donation will be made to a charity of your choice (you will have 3 to choose from). You will also be able to enter a prize draw for:

- One of three iPad Air 2 tablets (worth £400 each)
- One of 12 cash payments of £100, or a £100 donation to a charity of your choice.

Will I have the opportunity to talk to someone to provide my opinion on this subject? TRL is also carrying out interviews as part of the research. Towards the end of the survey you will be asked if you would like to be contacted regarding taking part in an interview.

Who can I contact if I have any questions? If you require any further information please ask one of the researchers or you can contact TRL on HGVresearch@trl.co.uk

There are no right or wrong answers so please respond honestly. Please note, questions with a * require an answer.

CONSENT

Before we can begin the survey we need to check a few things with you. Please state whether you agree with the following statements by ticking the appropriate box:

	Yes	No
1. I have read and understood all of the information above (if you have any questions, please ask)		
2. I feel sufficiently informed as to the survey's purpose		
3. I am aware that I am free to withdraw from the survey at any time		

Please only continue with the survey if you ticked 'yes' for each statement.

For all questions, choose one response unless otherwise indicated.

1. How often, on average, do you contract work which requires HGV operations in London (inside the M25)?

<input type="checkbox"/> 1 At least once a week	<input type="checkbox"/> 3 Less than once a month
<input type="checkbox"/> 2 At least once a month	<input type="checkbox"/> 4 Never
<input type="checkbox"/> 5 Don't know	

2. What sector do you procure the services of? (If you currently procure the services of more than one of these sectors, please select the one of which you have most experience)

<input type="checkbox"/> 1 Construction	<input type="checkbox"/> 6 Agriculture
<input type="checkbox"/> 2 Recycling/waste	<input type="checkbox"/> 7 Wholesale
<input type="checkbox"/> 3 General haulage and distribution	<input type="checkbox"/> 8 Manufacturing
<input type="checkbox"/> 4 Retail	<input type="checkbox"/> 9 Public authorities
<input type="checkbox"/> 5 Utilities	<input type="checkbox"/> 10 Other (please specify):
	<input type="checkbox"/>

3. If you are happy to, please briefly describe your job/ organisation:

4. Where do your contracted operations involving HGV journeys which operate within London typically start?

<input type="checkbox"/> 1 In London	<input type="checkbox"/> 3 Outside the UK
<input type="checkbox"/> 2 In the UK but not London	<input type="checkbox"/> 4 Don't know/varies too much to say

5. If you are able to, please state which type of Operator's Licence is held by the operators you generally use:

<input type="checkbox"/> 1 Standard National (carrying goods for others for hire and reward)
<input type="checkbox"/> 2 Standard International (as above)
<input type="checkbox"/> 3 Restricted (for carrying own goods in the course of your trade and business - does NOT permit hire and reward)
<input type="checkbox"/> 4 A mixture / I don't know

6. How many HGVs are typically on the fleet of organisations you contract out? (If you don't know but have a rough idea, please estimate)

<input type="checkbox"/> 1 1-9	<input type="checkbox"/> 4 250+
<input type="checkbox"/> 2 10-49	<input type="checkbox"/> 5 I contract to organisations with a range of fleet sizes
<input type="checkbox"/> 3 50-249	<input type="checkbox"/> 6 Don't know

7. What type(s) of HGV(s) are typically on the fleet of organisations you contract to?

<input type="checkbox"/> 1 Box van	<input type="checkbox"/> 8 Insulated van	<input type="checkbox"/> 15 Special purpose
<input type="checkbox"/> 2 Car transporter	<input type="checkbox"/> 9 Livestock carrier	<input type="checkbox"/> 16 Specially fitted van
<input type="checkbox"/> 3 Concrete mixer	<input type="checkbox"/> 10 Luton van	<input type="checkbox"/> 17 Street cleansing
<input type="checkbox"/> 4 Curtain sided	<input type="checkbox"/> 11 Panel van	<input type="checkbox"/> 18 Tanker
<input type="checkbox"/> 5 Dropside lorry	<input type="checkbox"/> 12 Refuse disposal	<input type="checkbox"/> 19 Tipper
<input type="checkbox"/> 6 Flat lorry	<input type="checkbox"/> 13 Skeletal vehicle	<input type="checkbox"/> 20 Tower wagon
<input type="checkbox"/> 7 Goods	<input type="checkbox"/> 14 Skip loader	<input type="checkbox"/> 21 Tractor
<input type="checkbox"/> 22 Don't know	<input type="checkbox"/> 23 Other (please specify):	

8. How do you ensure that your contractors operate legally in London, both at contract tender stage and over the life of the project? (Tick all that apply)

	a) At contract tender stage	b) Periodically over the life of the project
Obtain proof of valid O Licence	<input type="checkbox"/> 1	<input type="checkbox"/> 6
Obtain proof of vehicle maintenance/ roadworthiness	<input type="checkbox"/> 2	<input type="checkbox"/> 7
Obtain proof of driver CPC qualifications	<input type="checkbox"/> 3	<input type="checkbox"/> 8
Obtain proof of other driver training	<input type="checkbox"/> 4	<input type="checkbox"/> 9
Other (please specify):	<input type="checkbox"/> 5	<input type="checkbox"/> 10

Do your answers to Q8 apply to non-London as well as London-based contracts? If there are any differences between the two, please describe:

9. Which of the following statements comes closest to your own views about non-compliance with HGV regulations?

- 1 Non-compliance is ALWAYS ok (skip Q9)
- 2 Non-compliance is MOSTLY ok, depending on the circumstances (answer Q9)
- 3 Non-compliance is OCCASIONALLY ok, depending on the circumstances (answer Q9)
- 4 Not complying is NEVER ok (skip Q9)
- 5 Don't know/none of the above (skip Q9)

****Q9 TO BE ANSWERED BY THOSE RESPONDING 'MOSTLY OK' OR 'OCCASIONALLY OK' TO Q8 ONLY****

10. Under what circumstances do you think not complying would be acceptable?

11. Do you think that HGV regulatory non-compliance in London is...?

- 1 Not a problem at all
- 2 A small problem
- 3 A moderate problem
- 4 A big problem
- 5 Don't know

12. How important do YOU think it is for HGV operations to comply with legal requirements IN GENERAL?

- 1 Not at all important
- 2 Not very important
- 3 Neither important nor unimportant
- 4 Quite important
- 5 Very important

13. How important do YOU think it is to make sure...

	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
a) Operators are compliant? (e.g. correct type of licence)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
b) Transport managers are compliant? (e.g. correct CPC where required)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

14. In your opinion, how important do ORGANISATIONS WHICH OPERATE HGVs in London generally think it is to make sure...	14. In your opinion, how important do ORGANISATIONS WHICH OPERATE HGVs in London generally think it is to make sure...				
	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
a) Operators are compliant? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) Transport managers are compliant? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

15. Who do you think should be responsible for ensuring that... (Tick all that apply)	15. Who do you think should be responsible for ensuring that... (Tick all that apply)							
	Clients	Company owners/directors	Transport managers/ CPC holders	Fleet/health and safety managers	Drivers' line managers	Drivers	Enforcement agencies	Don't know
a) Operators are compliant? (e.g. correct type of licence)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
b) Transport managers are compliant? (e.g. correct CPC where required)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>

16. Please state how much you agree or disagree with the following statement:

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) Organisations/operators can easily get away with not being compliant	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

17. Please state how much you agree or disagree with the following statements: When HGV operations are compliant...

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) It helps the organisation win work	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) It saves the organisation money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) It benefits the environment (e.g. air quality)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) It makes drivers and vehicles safer on the road	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) It reduces the risk of being involved in an accident	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) It can be used as a marketing tool	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g) It reduces the amount of stress/pressure placed on managers	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
h) It costs the organisation money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i) It reduces the risk of being checked by enforcement agencies (e.g. DVSA)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
j) It increases productivity	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

18. Are there any other advantages or disadvantages of fully compliant HGV operations? Please describe:

19. Please state how much you agree or disagree with the following statements: When HGV operations are NOT compliant...

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
a) It helps the organisation win work	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b) It saves the organisation money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c) It reduces the amount of stress/pressure placed on managers	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d) It costs the organisation money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) It increases productivity	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) It improves driver availability (e.g. if CPC training is not kept up to date)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g) Drivers are able to earn more money	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
h) It results in bad publicity for the organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i) It affects the reputation of the organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
j) There is a negative impact on the organisation's credit record	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
k) It makes it difficult for the organisation to expand	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
l) There would be financial penalties	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
m) Enforcement agencies would keep an eye on the organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
n) The organisation would go out of business	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
o) Employees could be given a prison sentence	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

20. Are there any other advantages or disadvantages of HGV operations NOT being fully compliant? Please describe:

21. What effect, if any, do you think the following practices have on general compliance?

	Completely encourages compliance	Somewhat encourages compliance	Has no effect on compliance	Somewhat encourages NON-compliance	Completely encourages NON-compliance	Don't know
g) Use of productivity-related incentives/bonuses	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
h) Use of incentives/bonuses for fuel economy	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
i) Use of incentives/bonuses for accident-free driving	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
j) Strict timeslots for delivery	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
k) Pay per load	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
l) Job and finish	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>

22. How good do you think your knowledge is of the rules and regulations associated with the HGV industry relating to...

	Very poor	Quite poor	Average	Quite good	Very good
d) Operating HGVs in London	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e) Roadworthiness of HGVs	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f) Driving HGVs in London	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

23. Have you encountered any non-compliance issues with contractors in the last year?

1 No

2 Don't know

3 Yes – please describe:

24. Do you think that clients who contract HGV operators have a role to play in ensuring that operators are fully compliant? If so, what should they do?

1 No

2 Don't know

3 Yes – please describe:

25. If you needed information or advice on a compliance-related issue, would you know where to go (either within your organisation or externally)?

1 I would not need advice on any HGV compliance issues (skip Q27)

2 I may need advice but would not know where to go to find it

3 Yes – please describe:

26. Which of these have you used or would consider using to find information or advice on a compliance-related issue?	I have used this and would use it again	I have used this but WOULD NOT use it again	I have not used this but WOULD CONSIDER using it	I have not used this and WOULD NOT CONSIDER using it
j) FTA website/helpline/guidance	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
k) RHA website/helpline/guidance	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
l) Google/internet search	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
m) Trade press (e.g. Commercial Motor, Truck & Driver)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
n) TfL website/helpline/guidance (e.g. 'Operating in London')	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
o) Ask a manager within your organisation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
p) Ask a colleague or other contact in the industry	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
q) Go to your Trade Union	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

27. How do you think compliance with HGV-related rules and regulations in London could be improved?

Empty text box for response to question 27.

28. If you have any additional comments, please include them here:

Empty text box for additional comments.

29. Where did you first hear about this survey?

1 <input type="checkbox"/>	Email from TRL	6 <input type="checkbox"/>	SMMT bulletin
2 <input type="checkbox"/>	Twitter	7 <input type="checkbox"/>	DVSA bulletin
3 <input type="checkbox"/>	Friend/colleague	8 <input type="checkbox"/>	FORS application page
4 <input type="checkbox"/>	Email from FTA/RHA/MPA etc	9 <input type="checkbox"/>	Internet forum
5 <input type="checkbox"/>	CILT bulletin	10 <input type="checkbox"/>	Other (please specify)

30. For each fully completed survey we will donate £2 to one of the following charities. Please indicate which charity you would like to benefit from the completion of this survey.

- 1 LIGHTHOUSE CLUB – providing financial aid, advice, emotional and legal support to the construction industry and their families in times of hardship and stress.
- 2 TRANSAID – an international development charity which implements local transport solutions to improve access to basic services in Africa and developing countries, combining the expertise of the European Transport and Logistics industry with their experience of working in the developing world.
- 3 RAILWAY CHILDREN – an international children’s charity for vulnerable children living alone on the streets in the UK, India and East Africa.

31. Would you like to be entered into the prize draw to have the chance to win:

- One of 3 iPad Air 2 tablets or
- One of 12 cash prizes of £100?

Yes No

If you select 'yes' and are a winner, we will contact you to let you know. Please provide an email address or phone number. This information will not be used for any other purpose:

Contact details: _____

32. As part of this research, TRL is also carrying out telephone interviews with various members of the HGV industry. Those taking part in an interview will have the choice of receiving a £50 Amazon voucher, or a £50 donation to one of the three charities (Lighthouse Club, Transaid or Railway Children).

Would you be interested in receiving more information on this? If so, please provide an email address that we can contact you on. This information will not be used for any other purpose:

Email: _____

You have completed this survey! Thank you for taking the time to answer this survey! Your responses will help us to understand HGV operations in London and make recommendations for improvements.

Appendix B Short client survey

CONSENT

Before we can begin the survey we need to check a few things with you:

Please only continue with the survey if you tick 'yes' for each statement.	Y	N
1. I have read and understood all of the information above (if you have any Qs, please ask)		
2. I feel sufficiently informed as to the survey's purpose		
3. I am aware that I am free to withdraw from the survey at any time		

1. How often, on average, do you contract work which requires HGV operations in London (inside the M25)?

- At least once a week Less than once a month Don't know
 At least once a month Never

2. What sector do you procure the services of? (If >1, select the one of with most experience)

- Construction Retail Agriculture Manufacturing
 Recycling/waste Utilities Wholesale Public authorities
 General haulage and distribution Other (please specify):

3. Where do your contracted operations involving HGV journeys which operate within London typically start?

- In London In the UK but not London Outside the UK Don't know/varies

4. If you are able to, please state which type of Operator's Licence is held by the operators you generally use:

- Standard National (carrying goods for others for hire and reward)
 Standard International (as above)
 Restricted (for carrying own goods in the course of trade and business - NOT for hire and reward)
 A mixture / I don't know

5. How many HGVs are typically on the fleet of organisations you contract out? (If you don't know but have a rough idea, please estimate)

- 1-9 50-249 I contract to organisations with a range of fleet sizes
 10-49 250+ Don't know

6. What type(s) of HGV(s) are typically on the fleet of organisations you contract to?

- Box van Goods Skeletal vehicle Tipper
 Car transporter Insulated van Skip loader Tower wagon
 Concrete mixer Livestock carrier Special purpose Tractor
 Curtain sided Luton van Specially fitted van Don't know
 Dropside lorry Panel van Street cleansing Other (please specify):
 Flat lorry Refuse disposal Tanker

7. How do you ensure that your contractors operate legally in London, both at contract tender stage and over the life of the project? (Tick all that apply)

- | | a) At contract tender stage | b) Periodically over the life of the project |
|---|-----------------------------|--|
| Obtain proof of valid O Licence | <input type="checkbox"/> | <input type="checkbox"/> |
| Obtain proof of vehicle maintenance/ roadworthiness | <input type="checkbox"/> | <input type="checkbox"/> |
| Obtain proof of driver CPC qualifications | <input type="checkbox"/> | <input type="checkbox"/> |
| Obtain proof of other driver training | <input type="checkbox"/> | <input type="checkbox"/> |
| Other (please specify): | <input type="checkbox"/> | <input type="checkbox"/> |

Do your answers to Q7 apply to non-London as well as London-based contracts? If there are any differences between the two, please describe:

8. Which of the following statements comes closest to your own views about non-compliance with HGV regulations?

- Non-compliance is ALWAYS ok (skip Q9)
- Non-compliance is MOSTLY ok, depending on the circumstances (answer Q9)
- Non-compliance is OCCASIONALLY ok, depending on the circumstances (answer Q9)
- Not complying is NEVER ok (skip Q9)
- Don't know/none of the above (skip Q9)

****Q9 TO BE ANSWERED BY THOSE RESPONDING 'MOSTLY OK' OR 'OCCASIONALLY OK' TO Q8 ONLY****

9. Under what circumstances do you think not complying would be acceptable?

10. Are you aware that drivers may be stopped by enforcement agencies? What would happen if a driver missed a delivery slot/was late due to being stopped at the roadside?

11. How good do you think your knowledge is of the rules and regulations associated with the HGV industry relating to...

	Very poor	Quite poor	Average	Quite good	Very good
a) Operating HGVs in London	<input type="checkbox"/>				
b) Roadworthiness of HGVs	<input type="checkbox"/>				
c) Driving HGVs in London	<input type="checkbox"/>				

12. How important do YOU think it is to make sure...

	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
a) Operators are compliant? (e.g. correct type of licence)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Transport managers are compliant? (e.g. correct CPC where required)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Vehicles are compliant? (e.g. daily walkaround checks are completed, loads are properly secured)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Drivers are compliant? (e.g. correct type of licence for vehicle/load, CPC up to date, driver hours adhered to)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Deliveries are compliant? (e.g. parking restrictions adhered to)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) General driving behaviour is compliant? (e.g. seatbelt, not speeding, not using mobile phone)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Appendix C Interview topic guides

TOPIC GUIDE – DRIVER, MANAGER, OWNER AND CLIENT INTERVIEWS

- Thank you for agreeing to take part in this research. The interview should take no longer than an hour.
- We have quite a few questions to get through, so I may need to ask you to move on to another topic so that we don't run over.
- If you have any additional information or opinions that you would like to pass on after the interview, you are welcome to email them to us (hgvresearch@trl.co.uk).
- We are aiming to improve the understanding of why HGV operations do not always comply with regulations, with a particular focus on London.
- Before we begin, do you have any questions?
- You have already given your consent for the interview to be recorded, could you confirm that you are still happy with this? [begin recording]

Background information

- a) What sector does your organisation operate in? (For clients – what sectors do you procure the services of?)
- b) What type of operator's licence does your organisation have?
 - Standard national - for carrying goods for other people for hire and reward
 - Standard International - for carrying goods for other people for hire and reward
 - Restricted - for carrying own goods in the course of your trade and business - does not permit hire and reward
- c) What is your job role?

Non-compliance in London

1. What would you say are the top 3 non-compliance issues for HGVs operating in London?
2. How common do you think HGV regulatory non-compliance is in London?
3. Does the issue of non-compliance in London differ from the rest of the UK?
 - If yes, how does it differ between London and the UK?
 - Why do you think this is?
4. In your opinion, what type of
 - a) organisations / sectors
 - b) individuals (drivers, manager, clients)
 - c) vehicles
 ...are most likely not to comply with regulations?
5. How acceptable does the HGV industry in general think non-compliance is?
6. How acceptable do you personally think non-compliance is? Why?

Attitudes to non-compliance

7. Please describe the attitudes of others operating in the HGV industry towards compliance.
 - What is the perceived probability of detection amongst those who are not fully compliant?
 - What is the general attitude towards current deterrents?
 - What impact, if any, do you think being issued an FPN or PG9 has on behaviour? Does the risk of getting an FPN have any effect on compliance?

Consequences of non-compliance

8. Do you think those operating in the HGV industry have a good knowledge of how to be compliant? If not, why?
9. What is the general level of awareness of the dangers of non-compliance?
10. What is the general level of awareness of the legal consequences of non-compliance?

EXTRA Q FOR DRIVERS ONLY: If you get anyone mentioning that they have to choose which rules to break in order to get the job done (e.g. do they go over their driver hours to find somewhere legal to park, or do they park illegally in order to stay within their hours), could you ask HOW they make this decision. E.g. is it based on likelihood of getting caught, how much time/money they would save, etc?

Reasons for non-compliance

11. What do you think motivates organisations (i.e. owners / managers / operators) to not comply with the regulations associated with operating an HGV?
12. What do you think motivates drivers to not comply with the regulations associated with driving an HGV?
13. Are there any client driven factors that contribute to non-compliance? Do you think clients who use HGV services have a role to play in improving compliance? How?

EXTRA Q FOR CLIENTS ONLY: Are you aware that drivers may be stopped by enforcement agencies? What would happen if a driver missed a delivery slot/was late due to being stopped at the roadside?

14. Are there any regulatory factors that contribute to non-compliance? What regulations could be changed to improve compliance?
15. Are there any operational reasons particular to London that contribute to non-compliant activity?

Improving compliance

16. What would or could be done to motivate organisations (i.e. owners / managers / operators) to increase their compliance with the regulations associated with operating an HGV?
17. What would motivate drivers to increase their compliance with the regulations associated with driving an HGV? *Improved attitudes? Knowledge of dangers? Higher perceived risk of being caught?*
18. Currently, restricted operator licence holders are not required to hold a Certificate of Professional Competence. To what extent do you think this is linked to non-compliance? Why?

Safety culture

19. Is there anyone in the organisation appointed with sole responsibility for safety. Do you know what this person's job title is?
20. What is the general safety culture like in your organisation (in all areas, not just driving)? Does this affect the attitudes towards regulatory compliance for HGVs? How?

Reporting non-compliance

21. How easy is it to report any non-compliance seen in your own/other organisations? How likely is it that any reports of non-compliance would be acted on appropriately?

Enforcement activities

22. How effective do you think the current enforcement activities are in terms of detection and tackling non-compliance? What could be done to make it more effective?
23. Do you and/or the HGV industry in general know of particular areas where enforcement activities are more likely to take place? Have you heard of drivers avoiding these areas?

Training

24. How important is driver training? What types of training are considered most useful?
Induction, CPC, driver training, training on new legislation, remedial training, other
25. Who is seen as responsible for ensuring driver training is up to date? Who *should* be responsible for this?
26. Are there any changes to the training process or method of training for drivers that may increase compliance?

You said that you would like Amazon voucher / Charity payment

If Amazon – we will email this to you in the next couple of days. Please could you confirm receipt?

If charity – we will be making a bulk payment to [charity] at the end of the project.

Thank you very much for your time. The findings of this research will be published over the next few months.

TOPIC GUIDE – ENFORCEMENT AND REGULATING ORGANISATION INTERVIEWS

- Thank you for agreeing to take part in this research. The interview should take no longer than an hour.
- We have quite a few questions to get through, so I may need to ask you to move on to another topic so that we don't run over.
- If you have any additional information or opinions that you would like to pass on after the interview, you are welcome to email them to us (hgvresearch@trl.co.uk).
- We are aiming to improve the understanding of why HGV operations do not always comply with regulations, with a particular focus on London.
- Before we begin, do you have any questions?
- You have already given your consent for the interview to be recorded, could you confirm that you are still happy with this? [begin recording]

Background information

- a) What is your job role?
- b) How are you involved in enforcing HGV regulatory compliance in London?

Non-compliance in London

1. What would you say are the top 3 non-compliance issues for HGVs operating in London?
2. How common do you think HGV non-compliance is in London?
3. Does the issue of non-compliance in London differ from the rest of the UK?
If yes, how does it differ between London and the UK?
Why do you think this is?
4. In your opinion, what type of
 - a) organisations / sectors
 - b) individuals (drivers, manager, clients)
 - c) vehicles
 ...are most likely not to comply with regulations?
5. In your opinion, are there any differences in compliance amongst UK and non-UK operators? Why do you think this is the case?

Attitudes to non-compliance

6. Please describe the attitudes of others operating in the HGV industry towards compliance.
 - What is the perceived probability of detection amongst those who are not fully compliant? Why do you think this is?
 - What is the general attitude towards deterrents?
7. Do you think those operating in the HGV industry have a good knowledge of why they should be compliant?
8. How acceptable does the HGV industry in general think non-compliance is?

Consequences of non-compliance

9. Do you think those operating in the HGV industry have a good knowledge of how to be compliant?
10. Do you think those operating in the HGV industry have a good knowledge of the legal consequences of non-compliance?

Reasons for non-compliance

11. What do you think motivates organisations (i.e. owners / managers / operators) to not comply with the regulations associated with operating an HGV?
12. What do you think motivates drivers to not comply with the regulations associated with driving an HGV?

13. What would or could be done to motivate organisations (i.e. owners / managers / operators) to increase their compliance with the regulations associated with operating an HGV?
14. Are there any client driven factors that contribute to non-compliance? Do you think clients who use HGV services have a role to play in improving compliance? How?
15. Are there any regulatory factors that contribute to non-compliance? What regulations could be changed to improve compliance?
16. Are there any operational reasons particular to London that contribute to non-compliant activity?

Improving compliance

17. What would motivate drivers to increase their compliance with the regulations associated with driving an HGV? *Improved attitudes? Knowledge of dangers? Higher perceived risk of being caught?*
18. Currently, restricted operator licence holders are not required to hold a Certificate of Professional Competence. To what extent do you think this is linked to non-compliance? Why?
19. What elements of current common contractual practices contribute to non-compliance in HGV operations in London?
20. Does the relationship between operators and clients affect compliance? Do you think clients who use HGV services have a role to play in improving compliance? How?
21. How effective do you think the current enforcement activities are in terms of tackling non-compliance?
22. How could enforcement activities be changed to improve compliance?
23. Do you have any examples of best practice in compliance or enforcement that you can share?

Safety culture

24. Does the general safety culture (in all areas, not just driving) affect the attitudes within an organisation to regulatory compliance for HGVs? How?