

**A SURVEY OF ATTITUDES TO  
COMPLIANCE WITH ROAD  
SAFETY REQUIREMENTS:  
  
A NATIONAL STUDY**

**May 2007**



**Prepared by  
AMR Interactive**



**Australian Government**  
Department of Employment and  
Workplace Relations



**Australian Government**  
Australian Transport Safety Bureau

*National Transport Commission*

**A Survey of Attitudes to Compliance with Road Safety Requirements: A National Study**

Report Prepared by: **AMR Interactive**

**ISBN: 1 921168 68 4**

## REPORT OUTLINE

<b>Date:</b>	May 2007
<b>ISBN:</b>	1 921168 68 4
<b>Title:</b>	<b>A Survey of Attitudes to Compliance with Road Safety Requirements: A National Study</b>
<b>Address:</b>	National Transport Commission Level 15/628 Bourke Street MELBOURNE VIC 3000  E-mail: <a href="mailto:ntc@ntc.gov.au">ntc@ntc.gov.au</a> Website: <a href="http://www.ntc.gov.au">www.ntc.gov.au</a>
<b>Type of report:</b>	Research Report
<b>Objectives:</b>	To provide baseline data for future measurement of compliance with road transport regulatory requirements and assessment of the effectiveness of implemented national road transport reforms over time.
<b>NTC Programs:</b>	NTC Strategic Program, Road Safety
<b>Key Milestones:</b>	Delivery of final report in May 2007
<b>Abstract:</b>	<p>The NTC is assessing the effectiveness and the impact of its major national reforms.</p> <p>This report of a survey of the awareness and attitudes of heavy vehicle operators, and key 'off road' parties such as freight operators and major consignors to compliance with on-road safety requirements, provides data that can be used as baseline data for future reviews of the effectiveness of these requirements and road transport national compliance and enforcement reforms.</p>
<b>Purpose:</b>	For information.
<b>Key words:</b>	Heavy vehicle, road safety, reform evaluation.
<b>Enquiries to be addressed to:</b>	Jeff Potter National Transport Commission L15/628 Bourke Street MELBOURNE VIC 3000



## FOREWORD

The National Transport Commission (NTC) is a body established under an inter-governmental agreement with a charter to develop, monitor, and maintain uniform or nationally consistent regulatory and operational reforms relating to road transport, rail transport, and inter-modal transport. The NTC is funded jointly by the Australian Government, States and Territories.

Under this agreement, the NTC has a statutory obligation to review the success of, and maintain, the agreed reforms it has developed. However, in order to assess the effectiveness of its reforms, the NTC must first establish a set of base level compliance data for reform evaluation.

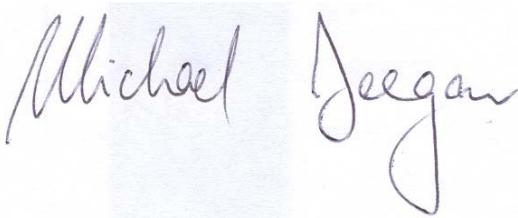
In 2004, the NTC contracted ARRB Transport Research to conduct an initial survey of existing data collections within Australia relevant to the issue of the effectiveness of implementation of key road transport safety reforms. ARRB also advised the NTC on a strategy to develop a usable set of base level compliance data for road transport reform evaluation. The ARRB report concluded that collection of data on key reforms from multiple sources would be necessary, before and throughout the lifespan of the reforms and beyond.

The survey assesses the awareness and attitudes of compliance with key safety requirements (mass limits, roadworthiness, load restraints, speed limits and seat belt laws) among freight operators, freight forwarders, logistics companies, major consignors such as retailers and manufacturers, ancillary operators such as farmers who both consign and move their own freight, and consignors who do not operate their own trucks.

The aim of these surveys is to address gaps in the identified data by obtaining a set of base level compliance data in order to build a more complete picture of the impact of these national reforms over time for use in measuring compliance with key national reforms.

A similar exercise is anticipated two to three years following implementation of this reform.

On behalf of Commissioners I would like to thank all those who took the time and effort to take part in the survey for providing valuable insights to this important issue.

A handwritten signature in blue ink that reads "Michael Deegan". The signature is written in a cursive style and is positioned to the right of a light blue rectangular stamp.

**Michael Deegan**

**Chairman**



## **ACKNOWLEDGEMENTS**

This survey would not have been possible without the support of the participating companies and the individual drivers who kindly took part.

The NTC acknowledges the funding provided by the Australian Transport Safety Bureau (ATSB) and by the Office of the Australian Safety and Compensation Council (ASCC), a branch of the Department of Employment and Workplace Relations.

The NTC would also like to thank Chris Brooks from the ATSB, representatives of the Office of the ASCC, and Jeff Potter and Christine Roche of the NTC who all provided valuable assistance with the formulation of the surveys and with the drafting of the final reports.



## GLOSSARY

Ancillary operator:	A firm that carries freight in its own vehicles but whose main business is normally non-transport related.
Articulated vehicle:	A combination consisting of a prime mover towing a semi-trailer.
B-double:	A combination consisting of a prime mover towing two semi-trailers where the first semi-trailer is connected to the prime mover by a fifth wheel coupling and the second semi-trailer is connected to the first semi-trailer by a fifth wheel coupling.
C&E Reform	Road Transport Compliance and Enforcement legislation.
Consignee:	A consignee of goods is a person who actually receives the goods after completion of their transport by road but does not include a person who merely unloads the goods.
Consignor:	A <i>consignor</i> of goods is a person who engages an operator of a vehicle, either directly or indirectly or through an agent or other intermediary, to transport the goods by road; who has possession of, or control over, the goods immediately before the goods are transported by road; or who loads a vehicle with the goods, for transport by road, at a place where goods in bulk are stored or temporarily held and that is unattended (except by a driver of the vehicle or any person necessary for the normal operation of the vehicle) during loading. If none of these apply, and the goods are imported into Australia — a person who imports the goods is a consignor.
Employee driver:	A driver employed directly by a company, not under contract.
Freight forwarder:	A sub-category of hire and reward operators that act as intermediaries between clients (consignors) and those that carry out the transport task (sub-contactors).
Freight operator:	A sub-category of hire and reward operators that secure consignments on a contractual basis, either directly from consignors or from freight forwarders.
Heavy vehicle:	Drivers in the survey were required to drive a heavy vehicle of at least 12 tonnes gross vehicle mass.
Hire and reward operator:	A firm that is involved in carrying freight for another firm on a contractual basis.
Gross vehicle mass (GVM):	The maximum loaded mass of a vehicle.
Independent driver:	An owner driver/operator not working as a subcontractor.
Long haul trip:	A trip of more than 100 km away from the start point.
Mainly-long haul:	A term used in the report to define companies in the survey sample for which at least 90% of trips conducted for or by the company are greater than 100 km.
Mainly-short haul:	A term used in the report to define companies in the survey sample for which less than 30% of trips conducted for or by the company are greater than 100 km.

Owner driver/operator:	Self-employed carriers operating their own business.
Prime contractor:	A prime contractor is a person who engages someone else to drive a regulated heavy vehicle under a contract for services. <i>(Example of a prime contractor: A logistics business that engages a subcontractor to transport goods.)</i>
Rigid truck:	A heavy vehicle that is not articulated.
Road train:	A combination, other than a B-double, consisting of a motor vehicle towing at least two trailers (counting as a single trailer a converter dolly supporting a semi-trailer).
Scheduler:	A person who schedules a driver's work or rest time; or who schedules the transport of passengers or goods by road; or who makes a demand that affects a time in a schedule. <i>(Example of a person who makes a demand that affects a time in a schedule: The distribution manager for a retail chain or a loading agent or freight forwarder who sets a deadline for a delivery.)</i>
Short haul trip:	A trip of less than 100 km away from the start point.
Subcontractor:	A driver engaged for a specific task or period of time, working who would usually operate for a range of clients, and under a business or company name.

# SUMMARY

## Background

The NTC has an immediate need for national data on current levels of compliance with key road safety regulatory reforms for use as baseline data in future assessments of the impact and effectiveness of these reforms.

## Objectives

In order to gauge the impacts of these national reforms on road transport operators, the NTC needs to gather data both prior to and post-national implementation of these reforms on the behaviour and attitudes to compliance with key road transport safety requirements.

Although drivers were included in the preliminary qualitative study, the focus of the main quantitative survey is those parties in the transport supply chain aside from drivers who exert influence and can affect compliance with road safety standards. These parties include freight forwarders, shippers, stevedores, packers, loaders, and major consignors of goods such as manufacturers, farmers, and retailers among others.

This study serves as a baseline measure, capturing a national picture of attitudes 'before' the impact of the new reforms start to take effect. Although Victoria and NSW have implemented the C&E Reform, it often takes a number of years after release of a new reform before changes in attitudes and behaviours start to filter through. Responses from NSW and Victoria are taken to represent a 'before' picture not an 'after' picture. The widespread nationwide communication of the reform could also have affected the jurisdiction-specific aspects of the results. Furthermore, there is no true baseline measure for NSW and Victoria on which to judge any possible impact of the reforms in these areas.

## The Study

A preliminary, qualitative study was conducted to explore issues with both drivers and companies involved in road freight transport. Companies included freight operators, freight forwarders, ancillary operators and consignors. Preliminary focus groups with drivers and in-depth interviews with companies were conducted during April/May 2006.

The main quantitative survey was conducted in August/September 2006, involving a final sample of 327 companies across Australia.

The sample pool of companies was developed in two main categories:

- Hire and reward operators (freight operators and freight forwarders) were sourced from the Yellow Pages (online). Company details were randomly selected from the lists in the Yellow Pages.
- Major consignors, including those that transport their own freight (ancillary operators) covering categories of agriculture, manufacturing, wholesaling and retail companies were sourced from lists of relevant major companies on the business website *IBISworld* (<http://www.ibisworld.com.au/enterprise/home.aspx>), supplemented with a pool of farmers sampled from the Yellow Pages.

The final sample was split between hire and reward (171) and consignors (156), with a similar split among the hire and reward companies between NSW/Victoria (92) and the rest of Australia (79).

Location	Total	Hire and Reward			Consignor		
		ON ROAD Freight Operators and Freight Forwarders	OFF ROAD Freight Forwarders	Total	ON ROAD Ancillary Operators	OFF ROAD Consignors	Total
NSW/Victoria	184	59	33	92	18	74	92
Other locations	143	57	22	79	27	37	64
<b>TOTAL</b>	<b>327</b>	<b>116</b>	<b>55</b>	<b>171</b>	<b>45</b>	<b>111</b>	<b>156</b>

The questionnaire was developed around the objectives for the research, with input from the qualitative research. The full questionnaire is provided in the Appendix. The questions covered:

- company location;
- transport activities;
- truck operation and driver employment;
- freight transport profile including main types of freight and short/long haul distribution;
- nomination of parties involved in road freight transport processes;
- perception of frequency of specific breaches occurring in their industry and in the transport of freight for/by their company;
- incidence of infringements within the company;
- perception of responsibility for different tasks in road freight transport;
- compliance and education practices within the company;
- attitudes towards compliance;
- awareness of ‘chain of responsibility’, and specific compliance and enforcement laws; and
- attitudes towards compliance and enforcement measures, and the effectiveness of these measures.

## Summary of Results

### The Survey as a Baseline

An important role of the study is as a baseline for measures of awareness, attitudes and behaviour of companies in the context of compliance with road safety standards. Changes in these measures at some later stage can be used to assess the effectiveness of the NTC’s

C&E Reform and the emerging speeding and vehicle standards reforms in meeting its objectives.

While the focus of the study is as a set of baseline measures, it is still possible to assess relationships within the results which point to areas that may need attention in promoting or selling the reforms to the industry. For example, certain issues may be addressable through promotional/educational material, or through changed enforcement practices. This could include identifying areas of the reforms which currently have less positive perceptions, and groups in the industry which hold these perceptions. Improving attitudes in such areas by promoting the benefits of the reforms and targeting particular groups can help contribute to the effectiveness of the reforms.

## **Compliance**

Companies perceived that breaches of laws occurred more frequently in ‘the industry’ than in the course of road freight transport for/by the company. That is, there is a trend for companies to consider that the problem was not relevant to them. The ability to rate how often breaches occur was influenced by the level of involvement that companies had in the transport chain. Companies that neither operated trucks nor employed drivers were typically most likely to be unsure about the level of offending. There was, however, evidence of a more ‘honest’ assessment by the off-road companies of regular offending. These companies, despite higher levels of being unsure about the level of offending, were more likely to consider that a range of offences occurred regularly. In contrast, companies operating the trucks, and having more information, were less likely to concede that breaches occurred.

Five types of offences were presented in the survey:

- overloaded vehicle;
- load not properly restrained;
- vehicle defect;
- driver speeding; and
- driver not wearing a seat belt.

The first two offences covered compliance areas specifically addressed by the current reform, while the last three covered other compliance areas. The inclusion of the additional offences gives a broader range of issues for companies to respond to, provides a better context for assessing the offences of focus in the first round of the reform, and will add to the validity of comparisons in the post-implementation research (e.g. do incidents targeted in the reforms reduce more than those that were not?).

Overall, over 40% of companies considered that each of the five types of offences presented in the survey occurred at least occasionally in transport by/for the company. The most common was ‘truck drivers driving over the speed limit’.

Among truck operators, perception of frequency of offending in transport by/for the company was greater among larger operators. This was consistent with the incidence of experiencing infringements within the company. It is possible that smaller companies simply do not perceive that breaches are occurring because there is less direct experience of infringements.

Truck operators reported on their experience of the five types of infringements in the past 12 months. Comparing this experience with their perception of the frequency of breaches in transport by/for their company produces an interesting pattern. The gap between experience of an infringement and perception of the breach occurring differed across the types of offences, as summarised below. This difference may imply that, at least from the experience of truck operators, levels of enforcement of certain offences are not commensurate with the incidence of these offences.

<b>Offence</b>	<b>Experience of infringement in last 12 months</b>	<b>Occurs at least occasionally in transport by/for company</b>	<b>Gap to perception</b>
Overloaded vehicle	27%	35%	8%
Vehicle defect	27%	36%	9%
Load not properly restrained	6%	26%	<b>20%</b>
Driver speeding	22%	50%	<b>28%</b>
Driver not wearing seat belt	12%	43%	<b>31%</b>

Infringements associated with the vehicle or load were more likely to be reported by truck operators in NSW/Victoria than in the rest of Australia. This difference may relate to variations in enforcement practices in the different states.

### **Practices in Place**

A wide range of practices is currently in place in the industry. Practices were more prominent among companies operating trucks or employing drivers, and much more common among larger operators.

Overall, 42% of companies had an Industry Code of Practice in place. This incidence increased to 76% for companies operating 30 or more trucks. It should be noted that the term was asked broadly, and was not related specifically to C&E Reform. The response rate to this question, however, could be used as an indicator of how many companies already have policies and procedures that may form a basis for compliance with the ‘chain of responsibility’ provisions contained in the C&E Reform.

A feasible hypothesis would be that the incidence of infringements would decrease as practices are put in place. In assessing what relationships there might be between the implementation of practices and experience with compliance, a confounding problem in this baseline phase was the dual relationship between size of company and both number of practices and experience of infringements. Companies with more practices reported a greater experience of infringements. One possible influence is that such companies may have better monitoring of infringements. It may also be possible that practices being reported by companies are ‘paper policies’ not put into practice, although the results from the parallel drivers survey suggests that fatigue-related practices and policies are implemented into operations quite widely.

A more practical approach will be to compare the baseline results to results gathered in a future survey and look at changes in both measures. This approach will allow interpretation of how increases in practices may relate to changes in offending. Such an analysis, however, will also need to take into account changes in enforcement practices which may

lead to changes in the incidence of violations being detected. The impact of practice implementation could also be tested using a case study approach, examining individual companies to measure incidence of infringements, implement practices/policies, and then measure incidence of infringements again.

### **Responsibility**

Drivers and the company operating the truck were the most nominated as responsible for the three outcomes presented to companies. Drivers were the most nominated as one of the parties responsible for ‘ensuring a load is properly restrained’ (92%), and ‘ensuring a vehicle is not overloaded’ (81%); while the company operating the vehicle was the party considered most responsible for ‘ensuring that a truck is not on the road with a defect’ (87%). The next most nominated party was the consignor, for ‘ensuring that a vehicle is not overloaded’ (by 38%); while a similar proportion (33%) nominated the company operating the truck as responsible for ‘ensuring a load is properly restrained’.

An impact of the C&E Reform will be to promote the responsibility of different parties in the transport chain. There was evidence in this baseline survey that companies in NSW/Victoria were more likely than companies in the rest of Australia to nominate the ‘company employing the driver’, the ‘company organising delivery’ and the ‘company consigning the freight in particular situations. Analysis of future survey data will confirm whether this pattern is related to the C&E Reform.

### **Attitudes to Road Freight Transport**

There was little difference in attitudes between companies in NSW/Victoria and those in the rest of Australia, even when focusing on the specific areas covered by the first round of reform. The overall pattern suggests that the C&E Reform has not yet had a measurable impact in NSW/Victoria. It would be expected that further implementation of the C&E Reform will improve the range of attitudes included in the survey, covering the different areas of the C&E Reform.

Companies operating trucks were more likely than off-road companies to agree that it is their ‘responsibility to promote road safety’. Operators, however, were also more likely to agree that a truck driver can ‘drive up to 10 km/h over the limit’. There is an opportunity to leverage the strong feeling of responsibility to promote road safety to improve attitudes towards specific behaviours such as speeding, at the time when the reforms are implemented around these behaviours.

Operators were also less likely to agree that overloaded trucks ‘substantially increase damage to roads’. This resistance was even more strongly expressed among operators with 30 or more trucks. Truck operators in particular should be considered a target for promoting the damage to roads caused by overloading.

### **Awareness of Changes**

About half (56%) of companies were ‘very familiar’ with the overall ‘Chain of Responsibility’ concept, as described to them in the survey. This concept was not asked about specifically in the context of Mass, Dimension, and Load Restraint offences. There was, again, little difference in familiarity between companies in NSW/Victoria and the rest of Australia. The qualitative research indicated familiarity with the phrase more broadly in the road freight transport industry, and the results from the survey are likely to reflect this broader familiarity.

It was found that familiarity was greater among companies operating trucks, and increasing with the size of the operation. Effective promotion of the ‘Chain of Responsibility’ should therefore include effort to reach smaller operators and off-road companies.

About half of the companies also nominated awareness of the introduction of a range of other laws. It is likely that the company representatives were thinking about a range of issues/activities occurring which would not be related to the C&E Reform, or possibly to any specific law. This pattern indicates that there is a lack of specific knowledge about real change. Nevertheless, the results still reflect a valid perception of activities in the road freight transport industry. Companies operating trucks tended to be more likely than off-road companies to nominate awareness of new laws, although greater awareness occurred more specifically among those companies employing drivers.

This pattern of awareness gives further support to the need to promote issues about road freight transport more broadly to companies operating within the industry, especially companies that do not operate their own trucks.

### **Agreement With Changes**

There was substantial variation in agreement to the different aspects of the C&E Reform. The strongest agreement was received for the measures associated with greater equity:

- ‘national consistency in implementation of laws and penalties’; and
- ‘changes to allow targeting of those who make profits from road safety breaches’.

‘Increasing powers of road authorities to enforce road transport laws’ was the least popular of the measures.

Companies were most likely to see that the C&E Reform will lead to ‘improvements in heavy vehicle road safety’ and ‘recognition of more accountability’. They were less likely to see that the reform would reduce ‘unfair advantage’ or ‘improvements in infrastructure/traffic management’.

Given the stronger acceptance of measures associated with greater equity, it is likely that acceptance of the C&E Reform will be improved through increasing the perception that the reform will reduce ‘unfair advantage’.

It may also be possible to leverage the greater agreement with the equity measures to improve acceptance of ‘increasing powers’ by showing how such powers will contribute to greater equity.

There was a general pattern for agreement with the measures and likelihood of the measures meeting objectives to be higher among consignors than among hire and reward companies, and among off-road companies compared with companies operating trucks. This pattern indicates that there should be more attention to promoting the benefits and effectiveness of the C&E Reform to operators in particular.

### **Conclusion**

The results of the study provide a baseline for measures of awareness, attitudes and behaviour of companies in the context of compliance with road safety regulations. Changes in these measures at some later stage can be used to assess the effectiveness of the NTC’s safety and compliance reforms in meeting their objectives.

The C&E Reform is a ‘work in progress’, with the introduction of only the first module set currently at various stages across the country. The tendency in much public discussion about the chain of responsibility is to overlook these facts, and to conflate issues. It is difficult to separate stakeholder understandings of the chain of responsibility concept in general and the specific mass, dimension and load restraint chain of responsibility provisions.

There are a number of opportunities to promote awareness and benefits of heavy vehicle safety requirements, and to influence attitudes towards compliance and acceptance of these requirements. These include:

- Promote new laws and issues about road freight transport more broadly to companies operating within the industry, especially consignors.
- Give more attention overall to promoting the benefits and effectiveness of the heavy vehicle safety requirements to operators.
- Leverage the strong feeling of responsibility to promote road safety among operators to improve attitudes towards specific behaviours such as speeding.
- Promote the damage to roads caused by overloading to truck operators, particularly larger operators, to improve their acceptance of this issue.
- Leverage the stronger acceptance of measures associated with greater equity to improve acceptance of other aspects of the heavy vehicle safety requirements through: increasing the perception that the reforms will reduce ‘unfair advantage’; and using changes in enforcement practice to highlight and leverage change—the ‘landmark’ case will change perceptions much more quickly than communication material.



## AT A GLANCE

Measure	Results for Companies
Involvement in Processes	<ul style="list-style-type: none"> <li>• Companies were presented with a range of transport processes associated with compliance with vehicle mass, dimension and load restraint, and asked to nominate parties involved in these processes. Companies employing drivers were asked specifically about the involvement of their drivers. Key trends were:               <ul style="list-style-type: none"> <li>– drivers were most likely to be involved in ‘loading/unloading’ and ‘restraining loads’;</li> <li>– other workers in a company were more likely to be involved in ‘loading/ unloading’ and ‘packing freight’ than in other processes;</li> <li>– more senior staff in a company were more likely to be involved in ‘working out mass/size of a load’, ‘selecting a vehicle’, planning the trip’ and selecting the driver’ than in other processes.</li> <li>– companies operating trucks were more likely to be involved in ‘selecting a vehicle’, ‘selecting the driver’ and ‘planning the route’.</li> </ul> </li> <li>• Hire and reward operators were generally more likely than consignors to be involved in the processes within the company, with two exceptions:               <ul style="list-style-type: none"> <li>– ‘packing freight’ was more likely to be done outside hire and reward operators; and</li> <li>– ‘loading/unloading’ was equally likely to be done within the company for both hire and reward operators and consignors.</li> </ul> </li> <li>• Companies operating trucks were also more likely than off-road companies to be involved in processes, particularly around involvement of their own drivers. This pattern was influenced by the much higher incidence of driver employment among operators. The following exceptions were noted:               <ul style="list-style-type: none"> <li>– both types of companies were equally involved in ‘packing freight’; and</li> <li>– drivers were equally infrequently involved in ‘selecting the driver’ and ‘selecting the vehicle’.</li> </ul> </li> </ul>
Responsibilities	<ul style="list-style-type: none"> <li>• Companies were asked which parties they considered responsible for specific activities. Respondents were allowed to nominate more than one party.</li> <li>• Drivers were by far the most likely to be held responsible for ‘restraining the load’ (92%) and ‘ensuring the vehicle was not over the legal weight’ (87%).</li> <li>• Other parties were much less frequently nominated as responsible. The highest incidence occurred for consignors being held responsible for the vehicle not being overloaded, by about a third (38%) of companies.</li> </ul>

Measure	Results for Companies
Compliance – In the Industry	<ul style="list-style-type: none"> <li>• Companies were presented with five types of incidents around heavy vehicle compliance and asked about how frequently each occurred in the industry; in the transport of freight by/for the company; and (among truck operators) infringements experienced in the company.</li> <li>• Some incidents were not part of the initial C&amp;E Reform but were included to give a broader context to the results, as well as setting up valid comparisons for post-implementation research (e.g. do incidents targeted in the reforms reduce more than those that were not?).</li> <li>• Each of the incidents was considered to occur ‘at least occasionally’ by over 40% of companies. ‘Driving over the speed limit’ was the most nominated, by over half (55%) of companies.</li> <li>• Hire and reward operators, and truck operators in general, were more likely to consider vehicle overloading to occur. The perception was also greatest among larger operators.</li> </ul>
Compliance – In the Company	<ul style="list-style-type: none"> <li>• ‘Vehicles loaded over their mass limit’ and ‘loads not properly restrained’ were considered to occur ‘at least occasionally’ by about a third of companies. These incidences were all lower than what was considered to be occurring in the broader industry.</li> <li>• Companies that did not operate trucks, particularly those which also did not employ drivers, were again more likely to give a ‘don’t know’ response than operators.</li> <li>• Among companies operating trucks, a quarter reported an infringement in the last 12 months for: an ‘overloaded vehicle’ (27%); a ‘vehicle defect’ (27%); and a ‘speeding driver’ (22%).</li> <li>• Less frequent infringements were: a ‘driver not wearing a seat belt’ (13%); and a ‘load not properly restrained’ (12%).</li> <li>• The incidence of infringements of each type increased with the number of trucks operated, which would reflect a greater chance of an offence occurring with more activity. In companies with 30+ trucks, over half reported an ‘overloaded vehicle’ infringement and a ‘vehicle defect’ infringement occurring in the last 12 months.</li> <li>• The incidence of infringements were generally greater among hire and reward companies than consignors, which was related to the greater average number of trucks operated by the former.</li> </ul>
Paying Fines	<ul style="list-style-type: none"> <li>• In about three quarters (76%) of companies the driver would ‘pay the fine’, while over half (60%) of companies would ‘investigate the incident’.</li> <li>• Other common responses were that the drivers would ‘lose their jobs after several incidents’ and where the driver would ‘get a warning’.</li> <li>• Larger operators were more likely to nominate consequences, including ‘get a warning’, and ‘investigate the incident’. Larger companies were also more likely to say that drivers would ‘pay the fine’ and would ‘lose their jobs after several incidents’.</li> </ul>

Measure	Results for Companies
Code of Practice	<ul style="list-style-type: none"> <li>• Fewer than half (42%) of the companies surveyed currently implemented an Industry Code of Practice. It should be noted that the term was asked broadly, and was not related specifically to C&amp;E Reform.</li> <li>• Implementation was much higher among hire and reward operators (55%) than consignors (28%). This trend was related to whether the company operated trucks or employed drivers. Those companies doing neither were the least likely to have an Industry Code (20%).</li> </ul>
Road Freight Transport Practices	<ul style="list-style-type: none"> <li>• Companies were asked which of a series of practices were currently in place in their company. About half or more companies had each of the compliance and education practices, and over a third had at least one accreditation scheme. The most common practices were to ‘monitor your company’s compliance with regulations’ (70%) and to ‘have systems to know the weight of the load’ (70%).</li> <li>• Companies operating trucks were more likely than those that did not to implement practices. This was evident across all the categories of practices being considered. Implementation also increased with the number of trucks operated. Over 90% of companies with 30+ trucks had each of the compliance and education practices, and 86% had an accreditation scheme.</li> <li>• More than half (61%) of companies overall were not part of an accreditation scheme.</li> </ul>
Attitudes to Road Freight Transport Issues	<ul style="list-style-type: none"> <li>• Companies were presented with a number of statements about compliance and enforcement. Greatest agreement occurred for accepting responsibility to ‘promote road safety to employees and contractors’, with over three quarters (81%) agreeing.</li> <li>• About three quarters of companies agreed that ‘compliance is improving’ in their industry, although few strongly agreed. Within this theme, about three quarters (73%) agreed that ‘overloading increases damage to roads’; about half (47%) agreed that it is easy for companies to get an ‘unfair advantage’ through breaking laws; and a third agreed that ‘many companies do not restrain loads properly’.</li> <li>• Truck operators were less likely than off-road companies to agree that overloaded trucks ‘substantially increase damage to roads’.</li> </ul>
Awareness of Change to Compliance and Enforcement Measures	<ul style="list-style-type: none"> <li>• About half (56%) of companies were ‘very familiar’ with the ‘Chain of Responsibility’ concept, as described in the survey. Familiarity was greater among companies operating trucks (71%) compared with off-road companies (41%). Familiarity also increased with the size of operator, 89% of companies operating 30+ trucks familiar.</li> <li>• ‘Chain of Responsibility’ was the most recognised new law, nominated by 71% of companies. Over half of companies reported awareness of ‘changes to penalties’ and ‘increased enforcement powers’ being marginally better nominated.</li> <li>• Companies operating trucks, particularly when they employed drivers, were more likely than off-road companies to nominate awareness of new laws.</li> </ul>

<b>Measure</b>	<b>Results for Companies</b>
<p>Agreement with the Government Introducing Measures</p>	<ul style="list-style-type: none"> <li>• Agreement with the introduction of each type of measure was very positive.</li> <li>• The strongest agreement was received for the measures associated with greater equity: ‘national consistency in implementation of laws and penalties’ (81% agreeing, including 51% rating at the highest scale point); and changes to ‘allow targeting of those who make profits from road safety breaches’ (82% agreeing, including 49% rating at the highest scale point).</li> <li>• There was a general pattern for agreement with the measures to be higher among consignors than among hire and reward companies, and among off-road companies compared with companies operating trucks.</li> </ul>
<p>Agreement that Measures will Achieve Reform Objectives</p>	<ul style="list-style-type: none"> <li>• Companies were more likely to agree that the C&amp;E Reform measures would achieve an outcome of ‘road safety’ than outcomes of ‘reducing unfair advantage’ or improvements in infrastructure/traffic management’.</li> <li>• Consignors were more likely than hire and reward operators to agree with the ‘fairness’ and ‘equity’ of the measures.</li> </ul>

# CONTENTS

<b>1. INTRODUCTION .....</b>	<b>1</b>
1.1 Background .....	1
1.2 Objectives of the Research .....	2
<b>2. METHOD.....</b>	<b>2</b>
2.1 Qualitative Research .....	2
2.2 Survey Research .....	2
2.2.1 <i>The sample</i> .....	2
2.2.2 <i>Questionnaire</i> .....	4
2.3 Analysis .....	5
2.3.1 <i>Reading the Results</i> .....	5
2.3.2 <i>General Results and Group Comparisons</i> .....	5
2.3.3 <i>Statistical Tests of Differences</i> .....	6
<b>3. RESULTS .....</b>	<b>7</b>
3.1 Profile of Companies .....	7
3.2 Involvement in Processes .....	11
3.3 Responsibilities .....	15
3.4 Compliance .....	17
3.4.1 <i>Incidents</i> .....	17
3.4.2 <i>Perception of Incidents Occurring within the Industry</i> .....	17
3.4.3 <i>Perception of Incidents Occurring in Transporting Freight by/for                 Company</i> .....	22
3.4.4 <i>Incidence of Infringements</i> .....	26
3.5 Practices in Place.....	28
3.5.1 <i>Industry Code of Practice</i> .....	28
3.5.2 <i>Road Freight Transport Practices</i> .....	28
3.6 Attitudes to Road Freight Transport Issues.....	30
3.7 Awareness of Change to Compliance and Enforcement Measures .....	33
3.7.1 <i>Chain of Responsibility</i> .....	33
3.7.2 <i>Awareness of Laws Introduced in the Last 12 Months</i> .....	33
3.7.3 <i>Agreement with the Government Introducing Measures</i> .....	35
3.7.4 <i>Agreement that Measures will Achieve Reform Objectives</i> .....	37
<b>4. DISCUSSION.....</b>	<b>41</b>
4.1 Trends in Responding .....	41
4.2 Company Profile .....	41
4.3 The Survey as a Baseline .....	41
4.4 Compliance .....	42
4.5 Practices in Place.....	43
4.6 Responsibility .....	44
4.7 Attitudes to Road Freight Transport .....	44
4.8 Compliance and Enforcement Reform .....	44
4.8.1 <i>Awareness</i> .....	44
4.8.2 <i>Agreement</i> .....	45
<b>5. CONCLUSION .....</b>	<b>45</b>
<b>6. REFERENCES .....</b>	<b>46</b>
<b>APPENDIX – QUESTIONNAIRE.....</b>	<b>47</b>

## LIST OF TABLES

Table 1.	Summary of Locations and Sample Sizes.....	4
Table 2.	Main Categories of Companies Used for Comparisons in the Analysis, Including Sample Size and Maximum 95% Confidence Interval .....	5
Table 3.	Profile of the Survey Sample .....	8
Table 4.	Main Types of Freight Transported.....	9
Table 5.	Activity Clusters .....	10
Table 6.	Profile Activity Clusters by Company Type .....	11
Table 7.	Involvement of Parties in Processes .....	12
Table 8.	Involvement in Processes, by Type of Company .....	14
Table 9.	Parties Responsible for Activities by Company Groups .....	16
Table 10.	Perceived Frequency of Incidents Occurring in the Industry.....	17
Table 11.	Frequency of Incidents in Transporting by/for the Company .....	22
Table 12.	Incidence of Drivers/vehicles Caught for Infringements in the last 12 months, by Company Groups .....	26
Table 13.	Typical Consequence to Driver of Being Caught, by Company Groups .....	27
Table 14.	Incidence of Road Freight Transport Practices in Place, by Company Groups .....	29
Table 15.	Agreement with Statements about Road Freight Transport, by Company Groups .....	32
Table 16.	Awareness of Road Transport Laws Introduced in the Last 12 Months, by Company Groups.....	34
Table 17.	Agreement with Introduction of Measures by the Government, by Company Groups.....	36
Table 18.	Agreement with Introduction of Measures by the Government, by Activity Clusters .....	37
Table 19.	Agreement that Measures will Achieve Reform Objectives, by Company Groups .....	39
Table 20.	Agreement that Measures will Achieve Reform Objectives, by Activity Clusters .....	40
Table 21.	Truck Operators Reported Experience of Offences .....	43

## LIST OF FIGURES

Figure 1. Parties Responsible for Activities .....	15
Figure 2. Perceived Incidence of 'Loads Not Properly Restrained' in the Industry.....	19
Figure 3. Perceived Incidence of 'Vehicles Loaded Over Their Mass Limit' in the Industry .....	19
Figure 4. Perceived Incidence of 'Heavy Vehicles on the Road with Defects' in the Industry .....	20
Figure 5. Perceived Incidence of 'Truck Drivers Driving Over the Speed Limit' in the Industry.....	20
Figure 6. Perceived Incidence of 'Truck Drivers Not wearing Seat Belts' in the Industry .....	21
Figure 7. Frequency of 'Loads Not Properly Restrained' in Transporting, by Company Groups .....	23
Figure 8. Frequency of 'Vehicles Loaded Over Their Mass Limit' in Transporting, by Company Groups.....	24
Figure 9. Frequency of 'Heavy Vehicles on the Road with Defects' in Transporting, by Company Groups.....	24
Figure 10. Frequency of 'Truck Drivers Driving Over the Speed Limit' in Transporting, by Company Groups.....	25
Figure 11. Frequency of 'Truck Drivers Not wearing Seat Belts' in Transporting by Company Groups .....	25
Figure 12. Use of Industry Code of Practice, by Company Groups .....	28
Figure 13. Number of Practices/Schemes in Place, by Company Groups .....	30
Figure 14. Agreement with Statements about Road Freight Transport .....	31
Figure 15. Familiarity with a 'Chain of Responsibility', by Company Groups.....	33
Figure 16. Agreement with Government Introducing Measures.....	35



## **1. INTRODUCTION**

### **1.1 Background**

The NTC has an immediate need for data to be collected on current levels of compliance with key heavy vehicle requirements. This is a priority because of the imminent national implementation of the NTC's national road transport Compliance and Enforcement Reform (C&E Reform), which is intended to improve compliance levels over time through a suite of regulatory and operational measures. Central to this reform is the road transport compliance and enforcement legislation.

The C&E Reform covers two distinct parts: a general legislative framework for the 'chain of responsibility'; and a series of specific modules which sit within or under that general framework (National Transport Commission, 2002, 2003). One of these modules was released at the same time as the general framework. This module deals with mass, dimension, and load restraint. A second module is the recently approved Heavy Vehicle Driver Fatigue reform.

Two further modules dealing with speed and vehicle standards are currently being developed. Some questions included in survey are relevant to future developments, as well as providing additional context for responses to elements of the current reform.

The reform targets operators of heavy vehicles as well as external third parties in the road transport chain who can also exert influence and affect compliance with road safety regulations.

Significant aspects of the 'chain of responsibility' reform include:

- A 'chain of responsibility' scheme extending liability for mass, dimension and load restraint offences to all parties who by their actions, inactions or demands exercise control or influence over conduct which affects compliance with road transport laws.
- Uniform and significantly expanded enforcement powers which may be viewed as intrusive by some parties.
- Uniform evidentiary laws and consistent liability for offences to ensure nationally consistent enforcement and prosecution of offences.
- Increased penalties and a significantly expanded range of sanctions in line with Occupational Health and Safety and environmental protection legislation which will enable enforcement agencies to target those who make profits from road safety breaches.

The C&E Reform is a 'work in progress'. While the initial Bill set up a legislative framework for the 'chain of responsibility' and introduced the mass, dimension and load restraint module of the chain, there are a number of modules in the chain to follow (provisions for fatigue, speeding and vehicle standards are at various stages of development). Moreover, implementation of the C&E Reform Bill, containing the first module of the chain of responsibility and the overall framework is at various stages across the country.

The tendency in much public discussion about the chain of responsibility is to overlook these facts. Because the C&E Reform Bill sets up a broad legislative framework for the

specific modules in the chain, there is a tendency to conflate issues. It is difficult to separate stakeholder understandings of the chain of responsibility concept in general and the specific mass, dimension and load restraint chain of responsibility provisions. In some cases, the results must be read within this context.

## **1.2 Objectives of the Research**

In order to gauge the impacts of this and key national safety reforms on road transport operators, behaviour and attitudes to compliance, the NTC needs to gather data both prior to and post-implementation of these reforms.

This study serves as a baseline measure, capturing a national picture of attitudes 'before' the impact of the safety reforms start to take effect. Although Victoria and NSW have implemented the C&E Reform, it often takes a number of years after adoption of a new reform before changes in attitudes and behaviours start to filter through. Responses from NSW and Victoria are taken to represent a 'before' picture not an 'after' picture. The widespread nationwide communication of the reform could also have affected the jurisdiction-specific aspects of the results. Furthermore, there is no true baseline measure for NSW and Victoria on which to judge any possible impact of the reform in these areas.

Although drivers were included in the preliminary qualitative study, the focus of the main quantitative survey is those parties in the transport supply chain aside from drivers who exert influence and can affect compliance with road safety standards. These parties include freight forwarders, shippers, stevedores, packers, loaders, and major consignors of goods such as manufacturers, farmers, and retailers among others.

Incidents other than those specifically addressed in the initial implementation of the C&E Reform were included to give a broader context to results, and to add to the validity of comparisons in the post-implementation research (e.g. do incidents targeted in the reforms reduce more than those that were not?).

## **2. METHOD**

### **2.1 Qualitative Research**

A preliminary, qualitative study was conducted to explore issues with both drivers and companies involved in road freight transport. Companies included both truck operators and consignors. Exploratory focus groups with drivers and in-depth interviews with companies were conducted during April/May 2006.

### **2.2 Survey Research**

#### **2.2.1 *The sample***

The main quantitative survey was conducted in August/September 2006, involving a final sample of 327 companies across Australia. Companies were recruited to fall into one of the following categories, involving road freight transport with vehicles of over 4.5 tonnes GVM:

- operate heavy vehicles to transport freight; or
- have their own freight transported by heavy vehicle; or

- have freight transported to them by heavy vehicle; or
- organise transporting freight by heavy vehicle.

The sample pool of companies was developed in two main categories:

- **MAIN BUSINESS AS TRANSPORT:** Companies were sourced from the Yellow Pages (online) in the categories of *transport* and *transport and forwarding agents*. These two categories have been referred to as *Freight Operators* and *Freight Forwarders* respectively in the report. Company details were randomly selected from the lists in the Yellow Pages (online).
- **MAJOR CONSIGNORS:** Companies that had freight transported by road but did not operate trucks (off-road); as well as companies that transported their own goods (referred to as *Ancillary Operators*). Consignors covered the categories of agriculture, manufacturing, construction, wholesale and retail. These companies were sourced in three ways:
  - Firstly through the business website *IBISworld*<sup>1</sup> which was found to have lists of major companies in a range of industries, covering those categories required for the study (<http://www.ibisworld.com.au/enterprise/home.aspx>). Examination of the range of companies confirmed the suitability of the lists. Company names were then searched on the Internet to generate head office telephone contact details.
  - Since a significant number of ancillary operators involved in road freight transport are farmers, the ancillary operator pool was boosted through selecting a sample of farmers from the Yellow Pages.

The initial intention was to split a sample of 300 companies as:

- 100 hire and reward operators, operating their own trucks;
- 100 ancillary operators; and
- 100 consignors or freight forwarders that did not operate their own trucks.

During the course of the survey, it was found that the majority of consignors did not operate their own trucks, and it was not feasible to reach a sample of 100 on-road consignors in an efficient way from the available pool of major companies. The final sample had 45 operators from the consignor sample pool.

The final sample was split between hire and reward operators (171) and consignors (156), with a similar split among the hire and reward operators between NSW/Victoria (92) and the rest of Australia (79).

The pool of major consignors also tended to generate a sample of suitable companies and was weighted more towards NSW/Victoria than the rest of Australia.

The final sample is described in Table 1, including main category of company, location, and operation of trucks. Although the companies were categorised based on a reasonable

---

<sup>1</sup> IBISworld is a company that specialises in research and information on Australian business. Given the nature of its operation and the breadth of coverage, it was considered a better source of information on major consignors than through purchasing business lists.

distinction between transport and consignor, the profile of activities nominated during the survey suggests that in reality this division is too restrictive. Nevertheless, the initial categorisation is an objective one that is useful for the purposes of making comparisons in the survey.

**Table 1. Summary of Locations and Sample Sizes**

Location	Total	Hire and Reward			Consignor		
		Operators (on road)	Non- Operators (off road)	Total	Ancillary operator (on road)	Non- Operator (off road)	Total
NSW/Victoria	184	59	33	92	18	74	92
Other locations	143	57	22	79	27	37	64
<b>TOTAL</b>	<b>327</b>	<b>116</b>	<b>55</b>	<b>171</b>	<b>45</b>	<b>111</b>	<b>156</b>

### 2.2.2 Questionnaire

The questionnaire was developed around the objectives for the research, with input from the qualitative research. The full questionnaire is provided in the Appendix. The questions covered:

- company location;
- transport activities;
- truck operation and driver employment;
- freight transport profile including main types of freight and short/long haul distribution;
- nomination of parties involved in road freight transport processes;
- perception of frequency of specific breaches occurring in their industry and in the transport of freight for/by their company;
- incidence of infringements;
- perception of responsibility for different tasks in road freight transport;
- compliance and education practices within the company;
- awareness of 'chain of responsibility', and specific compliance and enforcement laws; and
- attitudes towards compliance and enforcement measures, and the effectiveness of these measures.

## 2.3 Analysis

### 2.3.1 Reading the Results

In reading the results of the survey, it is important to note that each result is not a precise figure but an estimate based on a sample of drivers.

As a guide to the level of precision of the results, the following table shows the ‘maximum error range’ about a percentage result from a random sample of a given size, based on a 95% confidence (Table 2). This error in the estimation is greatest for a survey result of 50%.

### 2.3.2 General Results and Group Comparisons

The main body of Results Section (section 3) summarises the findings for each question. Comparisons have been made between different categories of companies, based on a number of groupings. These are summarised in Table 2, along with the sample sizes in the survey, and the corresponding maximum 95% confidence interval for results in the survey.

**Table 2. Main Categories of Companies Used for Comparisons in the Analysis, Including Sample Size and Maximum 95% Confidence Interval**

Grouping	Categories	Sample size	% of sample	Confidence interval for results in the survey
Total		327	100%	±5%
Industry	Hire and Reward Operators	171	52%	±8%
	Consignor (Ancillary and off-road)	156	48%	±8%
Truck operation	Yes (on-road)	161	49%	±8%
	No (off-road)	166	51%	±8%
Operation by Location	On-Road – NSW/Vic	77	24%	±11%
	On-Road – Other	84	26%	±11%
	Off-Road – NSW/Vic	107	33%	±10%
	Off-Road – Other	59	18%	±13%
Operation and Employment	Employ drivers and Operate trucks	148	45%	±8%
	Employ drivers only	43	13%	±15%
	Neither Operate/Employ	123	38%	±9%
Number of trucks [insufficient information for 12 companies]	1-4	48	15%	±14%
	5-29	64	20%	±12%
	30+	37	11%	±16%

### **2.3.3 Statistical Tests of Differences**

Chi-square tests have been used to compare differences among the groups of drivers. Statistically significant differences within each grouping have been highlighted by:

- a symbol above the grouping measure (\*) in charts; or
- by bolding higher results in tables (24).

Results have been reported at a statistical significance level of .05.

### **3. RESULTS**

#### **3.1 Profile of Companies**

Table 3 shows the breakdown of the sample by a number of profile variables.

Hire and reward operators in the sample were more likely to operate trucks than consignors (68% vs. 29%).

Among those companies operating trucks, ancillary operators operated fewer trucks. About half of the ancillary operators operated 1-2 trucks, compared with an eighth of hire and reward operators.

Companies operating trucks were also much more likely than those that did not to employ drivers (92% vs. 26%). Among those companies employing drivers, almost all operators had employed 'company' drivers, while consignors were much more likely to only employ owner drivers or sub-contractor drivers.

Companies operating 30 or more trucks were also more likely than smaller operators to employ owner or sub-contractor drivers. About a fifth (19%) of operators with 1-4 trucks reported not employing any drivers, presumably meaning that the company owners were the operators (i.e. owner drivers/operators).

The companies in the survey were involved in transporting a wide variety of freight (Table 4). The number of types of freight was greater among hire and reward operators than consignors, and increased with the number of trucks operated. Major categories of freight were 'building material' (23%), 'machinery' (25%), 'manufactured goods' (29%), and 'general/mixed freight' (38%).

**Table 3. Profile of the Survey Sample**

Profile	Total (n=327) %	Industry		Truck Operation		Operation and Employment			Number of Trucks Operated		
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	On-Road (n=161) %	Off-Road (n=166) %	Employ and Operate (n=148) %	Employ and Not Operate (n=43) %	Neither Operate/Employ (n=123) %	1-4 (n=48) %	5-29 (n=64) %	30+ (n=37) %
<b>State</b>											
NSW/Vic	56	54	59	48	<b>64</b>	48	<b>65</b>	<b>64</b>	42	52	51
Other	44	46	41	<b>52</b>	36	<b>52</b>	35	36	58	48	49
<b>Industry</b>											
Hire and Reward	52	100	–	<b>72</b>	33	<b>76</b>	<b>49</b>	28	44	<b>81</b>	<b>92</b>
Consignor	48	–	100	28	<b>67</b>	24	<b>51</b>	<b>72</b>	<b>56</b>	19	8
<b>Number of trucks operated</b>											
0	51	32	<b>71</b>	0	–	0	–	–	–	–	–
1-4	16	13	19	28	–	32	–	–	100	–	–
5-29	21	<b>33</b>	8	45	–	43	–	–	–	100	–
30+	12	<b>22</b>	2	27	–	25	–	–	–	–	100
<b>Driver employment</b>											
Does not employ drivers	42	22	<b>63</b>	8	<b>74</b>	–	–	<b>100</b>	<b>19</b>	2	0
Company Only	21	26	17	<b>42</b>	2	<b>45</b>	7	–	<b>58</b>	39	27
Company Plus Other	21	<b>36</b>	6	<b>43</b>	1	<b>47</b>	2	–	13	<b>55</b>	<b>70</b>
Other Only	16	16	15	7	<b>23</b>	8	<b>91</b>	–	10	5	3
<b>% Long haul</b>											
0%	18	18	18	<b>24</b>	12	<b>24</b>	14	11	<b>35</b>	21	11
1-29%	30	<b>35</b>	24	26	33	26	30	34	27	21	30
30-89%	33	27	<b>41</b>	27	<b>40</b>	27	33	<b>43</b>	19	31	32
90-100%	19	21	17	23	15	23	23	12	19	26	27

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

**Table 4. Main Types of Freight Transported**

Usual Types of Freight Carried	Total (n=327) %	Industry		Truck Operation		Number of trucks operated		
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	On-Road (n=161) %	Off-Road (n=166) %	1-4 (n=48) %	5-29 (n=64) %	30+ (n=37) %
Dangerous goods	13	17	8	16	10	8	16	16
Refrigerated or temperature controlled	13	15	10	12	13	8	14	12
Livestock	6	4	10	8	5	3	7	5
Building materials	23	29	16	27	19	15	28	33
Farm produce	17	16	17	24	10	8	24	12
Farming requirements	3	4	3	4	3	0	4	5
Raw materials	3	4	3	4	2	0	5	0
Metal/steel/plastic	5	6	4	5	5	7	5	12
Other bulk	7	8	7	9	6	5	9	7
Machinery	25	<b>35</b>	15	25	25	24	26	<b>37</b>
Car carrying	6	7	6	2	10	10	3	12
Containers/pallets	4	6	2	5	3	3	5	2
Groceries	14	20	8	16	13	10	17	12
Foodstuffs/pet food/drinks	4	3	6	4	5	3	4	7
Furniture	4	7	1	6	3	7	5	2
Household electrical goods	4	5	3	2	5	5	2	5
Other manufactured goods	21	22	21	15	27	27	16	26
General or mixed freight	38	<b>61</b>	12	41	34	41	43	47
Express freight	10	15	5	10	11	6	8	16
<i>Average categories</i>	2.3	2.9	1.7	2.4	2.2	1.6	2.3	3.8

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

Companies were also asked about the range of activities that they were involved in. Five types of activities were presented (Table 5). It is in this context that categorising companies as 'operator' or 'consignor' was found not to be a precise definition. For example, not all companies specifically listed as a 'trucking company' in the Yellow Pages nominated the activity 'you are contracted to transport freight for other companies'.

As a further way of describing the companies in the survey, a *cluster analysis* technique was used to assess how companies grouped together on the five activities. This produced five clusters, profiled in Table 5.

One cluster was made up wholly of on-road companies (On-Road 1) with a broad range of nominated activities. Two additional clusters were two thirds on-road (On-Road 2, 3). One (On-Road 2) was discriminated as not receiving goods; and the second (On-Road 3) was discriminated by being fully involved in 'receiving' goods, and being more heavily involved in both logistics and being hired out to transport freight.

The final two clusters were both off-road (Off-Road 1, 2), being discriminated largely by whether or not they were involved in the 'logistics' of organising transport of freight. The second group (Off-Road 2) has been classified as only being a consignor (including receiving freight).

The company groups are profiled against these clusters in Table 6.

**Table 5. Activity Clusters**

NOTE: Main activities defining the cluster are **bolded**

Activities	CLUSTERS					
	Total (n=327)	On-Road 1 – ALL ON ROAD, BROAD ACTIVITIES (n=57)	On-Road 2 – NOT RECEIVE (n=82)	ON-ROAD 3 – CONTRACTED/ LOGISTICS /RECEIVE (n=68)	Off-Road 1 – CONSIGN// LOGISTICS (n=61)	Off-Road 2 – CONSIGN ONLY (n=59)
	%	%	%	%	%	%
<i>Operate own trucks</i>	49	<b>100</b>	<b>66</b>	<b>72</b>	0	2
You use your own trucks or trailers to transport your own goods [ON-ROAD]	28	<b>100</b>	32	15	0	0
You are contracted to transport freight for other companies [CONTRACTED]	37	60	<b>45</b>	<b>72</b>	0	0
You hire trucking companies to transport your goods [CONSIGNOR]	72	<b>100</b>	<b>40</b>	35	<b>100</b>	<b>100</b>
You organise the transport of freight for consignors or receivers [LOGISTICS]	67	84	<b>66</b>	<b>81</b>	<b>100</b>	0
You receive freight transported by trucks belonging to other companies [RECEIVER]	69	<b>100</b>	0	<b>100</b>	<b>100</b>	64

**Table 6. Profile Activity Clusters by Company Type**

Profile of Activities	Total (n=327) %	Industry		Operation and Employment			Truck Operation		Number of Trucks Operated		
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	Employ and Operate (n=148) %	Employ and Not Operate (n=43) %	Neither Operate/Employ (n=123) %	On-Road (n=161) %	Off-Road (n=166) %	1-4 (n=48) %	5-29 (n=64) %	30+ (n=37) %
On-Road 1 – ALL ON-ROAD / BROAD ACTIVITIES	17	18	17	<b>34</b>	0	0	<b>36</b>	0	44	36	30
On-Road 2 – NOT RECEIVE	25	<b>35</b>	15	<b>33</b>	<b>30</b>	12	<b>34</b>	17	42	27	27
On-Road 3 – CONTRACTED / LOGISTICS RECEIVE	21	<b>32</b>	8	<b>32</b>	<b>21</b>	8	<b>31</b>	11	13	<b>38</b>	<b>43</b>
Off-Road 1 – CONSIGN / LOGISTICS	19	13	<b>25</b>	0	23	<b>41</b>	0	<b>37</b>	0	0	0
Off-Road 2 – CONSIGN ONLY	18	2	<b>35</b>	0	26	<b>38</b>	0	<b>35</b>	0	0	0

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

### 3.2 Involvement in Processes

Companies were presented with a range of transport processes associated with compliance with vehicle mass, dimension and load restraint, and asked to nominate parties involved in these processes. Companies employing drivers were asked specifically about the involvement of their drivers. Furthermore, all companies were asked about the involvement of managers/workers within their company. It was therefore possible to calculate an overall involvement of a company, and hence the extent to which only parties outside the company were involved. This calculation took into account cases where the process was not applicable to the company.

The involvement of parties across each process is summarised in Table 7. This summary shows some general trends for involvement in specific tasks. As companies are answering about involvement from different perspectives, it is not definitive (e.g. nominating ‘company operating the trucks’ will be more relevant to companies which do not operate their own trucks, although it will still be relevant to operators receiving goods from other companies). For example:

- drivers were most likely to be involved in ‘loading/unloading’ and ‘restraining loads’;
- other workers in a company were more likely to be involved in ‘loading/ unloading’ and ‘packing freight’ than in other processes;

- more senior staff in a company were more likely to be involved in ‘working out mass/size of a load’, ‘selecting a vehicle’, ‘planning the trip’ and ‘selecting the driver’ than in other processes; and
- companies operating trucks were more likely to be involved in ‘selecting a vehicle’, ‘selecting the driver’ and ‘planning the route’.

**Table 7. Involvement of Parties in Processes**

**Bolded:** Highlighting patterns of higher involvement for that party.

Parties involved	Processes						
	Working out the mass /size of load %	Selecting the vehicle for a job %	Loading or unloading the vehicle %	Restraining the load on the vehicle %	Planning the route for a trip %	Selecting the driver %	Packing freight %
<b>Within Company</b> [including drivers if relevant]	<b>66</b>	54	<b>75</b>	<b>61</b>	55	46	<b>60</b>
<b>Own Drivers</b>	20	8	<b>33</b>	<b>47</b>	26	8	15
<b>Outside Company only</b> [balance of WITHIN COMPANY and NOT APPLICABLE]	28	<b>41</b>	21	28	<b>39</b>	<b>46</b>	<b>42</b>
A manager or director in your company	<b>37</b>	<b>40</b>	14	11	<b>32</b>	<b>36</b>	13
Workers in your company other than drivers or managers	24	10	<b>44</b>	15	10	6	<b>43</b>
The consignor of the goods	<b>19</b>	7	<b>17</b>	10	8	5	<b>24</b>
The receiver of the goods	4	2	<b>22</b>	2	2	1	3
Company operating the trucks	31	<b>45</b>	19	28	<b>44</b>	<b>51</b>	17
Not Applicable	6	5	4	11	6	8	12

Table 8 summarises involvement in processes for different types of companies.

Hire and reward operators were generally more likely than consignors to be involved in the processes within the company, with two exceptions:

- 'packing freight' was more likely to be done outside hire and reward operators; and
- 'loading/unloading' was equally likely to be done within the company for both hire and reward operators and consignors.

Companies operating trucks were also more likely than off-road companies to be involved in processes, particularly around involvement of their own drivers. This pattern was influenced by the much higher incidence of driver employment among operators. The following exceptions were noted:

- both types of companies were equally involved in 'packing freight'; and
- drivers were equally infrequently involved in 'selecting the driver' and 'selecting the vehicle'.

There were few differences by size of operator, with the following exceptions:

- 'working out mass/size of load' and 'packing of freight' tended to be more likely to be conducted outside companies operating 5-29 trucks (19% and 30% respectively) and 30+ trucks (22% and 30%) compared with companies operating 1-4 trucks (8% and 10%); and
- drivers employed in these larger operators were more likely to be involved in 'restraining the load' (83% for operators with 5-29 trucks and 89% with 30+ trucks, compared with 67% with 1-4 trucks).

**Table 8. Involvement in Processes, by Type of Company**

NOTE: 'Outside Company' is the balance of 'not applicable' and 'Within Company'.

Processes and parties involved	Total (n=327) %	Industry		Truck Operation		Operation and employment			Number of trucks operated		
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	On-Road (n=161) %	Off-Road (n=166) %	Employ and Operate (n=148) %	Employ and Not Operate (n=43) %	Neither Operate/Employ (n=123) %	1-4 (n=48) %	5-29 (n=64) %	30+ (n=37) %
<b>Working out mass/size of load</b>											
Not Applicable	6	5	7	4	8	4	5	10	2	5	0
Own Drivers	20	24	15	<b>34</b>	6	<b>36</b>	23	–	40	30	41
Within Company (incl. drivers)	<b>66</b>	<b>73</b>	58	<b>79</b>	54	<b>80</b>	<b>79</b>	45	90	73	81
Outside Company	28	22	<b>35</b>	17	<b>38</b>	16	16	<b>46</b>	8	<b>22</b>	<b>19</b>
<b>Selecting the vehicle</b>											
Not Applicable	5	5	5	5	5	5	2	7	15	2	0
Own Drivers	8	7	10	9	7	10	<b>28</b>	–	<b>17</b>	5	5
Within Company (incl. drivers)	54	<b>66</b>	42	<b>70</b>	39	<b>73</b>	<b>74</b>	27	65	75	73
Outside Company	41	29	<b>53</b>	25	<b>55</b>	22	23	<b>67</b>	21	23	27
<b>Loading or unloading</b>											
Not Applicable	4	4	4	1	7	0	0	10	2	2	0
Own Drivers	33	<b>44</b>	21	<b>56</b>	11	<b>61</b>	42	–	56	58	57
Within Company (incl. drivers)	<b>75</b>	77	72	<b>91</b>	59	<b>93</b>	<b>91</b>	48	94	94	84
Outside Company	21	19	23	8	<b>34</b>	7	9	<b>42</b>	4	5	16
<b>Restraining the load</b>											
Not Applicable	11	9	13	4	18	3	2	24	6	3	0
Own Drivers	47	<b>63</b>	31	<b>76</b>	20	82	77	–	67	<b>83</b>	<b>89</b>
Within Company (incl. drivers)	<b>61</b>	<b>77</b>	43	<b>89</b>	33	<b>93</b>	<b>93</b>	11	83	94	97
Outside Company	28	14	<b>44</b>	7	<b>49</b>	4	5	<b>65</b>	10	3	3
<b>Planning the route</b>											
Not Applicable	6	5	6	2	10	2	9	10	0	3	3
Own Drivers	26	30	21	<b>39</b>	13	42	51	–	<b>48</b>	28	<b>49</b>
Within Company (incl. drivers)	<b>55</b>	<b>70</b>	40	<b>80</b>	32	<b>82</b>	<b>77</b>	16	88	77	84
Outside Company	39	25	<b>54</b>	19	<b>58</b>	16	14	<b>74</b>	13	20	14
<b>Selecting the driver</b>											
Not Applicable	8	9	6	4	11	3	9	11	8	2	0
Own Drivers	8	8	8	8	8	9	<b>33</b>	–	17	5	5
Within Company (incl. drivers)	46	<b>61</b>	29	<b>72</b>	21	<b>74</b>	<b>65</b>	6	71	72	73
Outside Company	<b>46</b>	30	<b>64</b>	24	<b>68</b>	23	26	<b>83</b>	21	27	27
<b>Packing freight</b>											
Not Applicable	12	<b>19</b>	4	15	9	16	14	7	10	14	22
Own Drivers	15	<b>22</b>	8	<b>29</b>	2	<b>31</b>	9	–	35	31	22
Within Company (incl. drivers)	<b>60</b>	48	<b>72</b>	61	58	59	67	54	<b>79</b>	56	49
Outside Company	28	<b>33</b>	24	24	33	24	19	<b>38</b>	10	<b>30</b>	<b>30</b>

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

### 3.3 Responsibilities

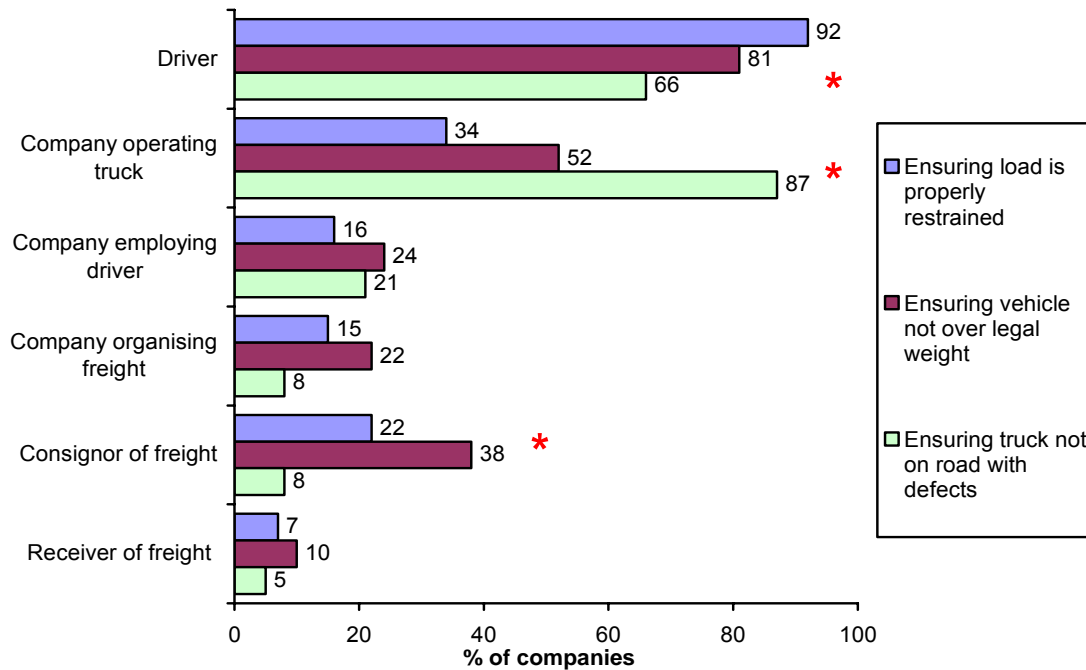
Companies were asked which parties they considered responsible for specific activities:

- ensuring the load is properly restrained;
- ensuring that a vehicle is not over the legal weight; and
- ensuring that a truck is not on the road with defects (included as an additional activity, not specifically part of the current C&E Reform).

Respondents were allowed to nominate more than one party. Drivers were by far the most likely to be held responsible for ‘restraining the load’ (92%) and ‘ensuring the vehicle is not over the legal weight’ (87%) (Figure 1). The driver was also considered responsible for the roadworthiness of the vehicle by two thirds of companies, but in this case the company operating the truck was most likely to be nominated (87%).

Other parties were much less frequently nominated as responsible. The highest incidence occurred for consignors being held responsible for the vehicle not being overloaded, by about a third (38%) of companies.

**Figure 1. Parties Responsible for Activities**



\* Statistically significant difference between responses ( $p < .05$ ).

Looking at the company groupings revealed that larger operators were more likely than smaller operators to nominate their own company (as ‘operator of the truck’ and ‘employer of the driver’) as responsible (Table 9). Larger operators were also more likely to consider the ‘driver of the truck’ as responsible for roadworthiness.

Companies in NSW/Victoria were also more likely than companies in the rest of Australia to nominate certain parties. This occurred consistently among off-road companies in nominating the ‘company that employs the driver’, but also occurred around the ‘company

organising the freight’; and also occurred among on-road companies for the ‘consignor of the freight’ in relation to restraining loads and vehicle mass.

**Table 9. Parties Responsible for Activities by Company Groups**

Parties responsible	Total (n=327) %	Industry		State Operations Groups				Number of Trucks Operated		
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	On-Road NSW/Vic (n=77) %	On-Road Other (n=84) %	Off-Road NSW/Vic (n=107) %	Off-Road Other (n=59) %	1-4 (n=48) %	5-29 (n=64) %	30+ (n=37) %
<b>Ensuring a load on a truck is properly restrained</b>										
Driver of the truck	92	93	90	95	94	90	88	95	96	94
Company that operates the truck	34	34	35	34	34	39	27	33	26	<b>52</b>
Company that employs the driver	16	12	<b>21</b>	15	15	<b>22</b>	10	18	11	23
Company organising the freight	15	12	18	16	6	21	14	10	4	<b>26</b>
Consignor of the freight	22	18	26	<b>28</b>	17	23	18	20	21	32
Receiver of the freight	7	6	8	11	3	7	6	8	4	13
None of these	0	1	0	0	0	1	0	0	0	0
<b>Ensuring that a vehicle is not loaded over its legal weight</b>										
Driver of the truck	81	83	78	<b>90</b>	78	78	78	78	87	90
Company that operates the truck	52	<b>58</b>	45	48	<b>63</b>	51	45	55	45	<b>81</b>
Company that employs the driver	24	23	26	16	22	<b>37</b>	16	18	13	<b>35</b>
Company organising the freight	22	23	21	20	15	<b>32</b>	16	15	17	23
Consignor of the freight	38	<b>43</b>	33	<b>48</b>	34	<b>44</b>	22	28	<b>47</b>	<b>58</b>
Receiver of the freight	10	11	8	7	11	14	4	8	6	16
None of these	0	0	0	0	0	0	0	0	0	0
<b>Ensuring that a truck is not on the road with a defect</b>										
Driver of the truck	66	69	62	70	60	<b>71</b>	57	65	53	<b>87</b>
Company that operates the truck	87	<b>91</b>	84	90	94	83	84	85	<b>96</b>	<b>100</b>
Company that employs the driver	21	19	23	16	12	<b>31</b>	20	<b>18</b>	6	<b>26</b>
Company organising the freight	8	8	9	10	2	10	12	3	0	<b>19</b>
Consignor of the freight	8	7	9	7	5	8	14	5	2	13
Receiver of the freight	5	5	5	7	2	5	8	3	0	13
None of these	1	1	1	2	0	0	2	0	2	0

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

### 3.4 Compliance

#### 3.4.1 Incidents

Companies were presented with five types of incidents around heavy vehicle compliance and asked about how frequently each occurred:

- in the industry;
- in the transport of freight by/for the company; and
- (among truck operators) infringements experienced in the company.

The five incidents fell into two categories:

- (a) VEHICLE/LOAD
  - loads not properly restrained;
  - vehicles loaded over their mass limit; and
  - heavy vehicles on the road with defects.
- (b) DRIVING OFFENCES
  - truck drivers not wearing seat belts; and
  - truck drivers driving over the speed limit.

It should be noted that the first two incidents under vehicle/load were specifically part of the Mass, Vehicle and Load Restraint module introduced in the initial C&E Reform. The other incidents were included to give a broader context to results, and to add to the validity of comparisons in the post-implementation research (e.g. whether incidents targeted in the reforms reduce more than those that were not).

#### 3.4.2 Perception of Incidents Occurring within the Industry

Companies were least able to rate frequency of incidents associated with ‘seat belt wearing’, with a third responding ‘don’t know’ (Table 10).

**Table 10. Perceived Frequency of Incidents Occurring in the Industry**

Frequency	Loads not properly restrained %	Vehicles loaded over their mass limit %	Heavy vehicles on the road with defects %	Truck drivers not wearing seat belts %	Truck drivers driving over the speed limit %
Never	<b>37</b>	<b>40</b>	29	24	24
Don’t know	12	13	21	32	21
Occasionally	37	33	37	23	34
Regularly but not frequently	7	7	6	8	8
Quite often	4	6	5	7	10
Very frequently	3	1	2	6	3
<b>At least occasionally</b>	<b>51</b>	<b>47</b>	<b>50</b>	<b>44</b>	<b>55</b>

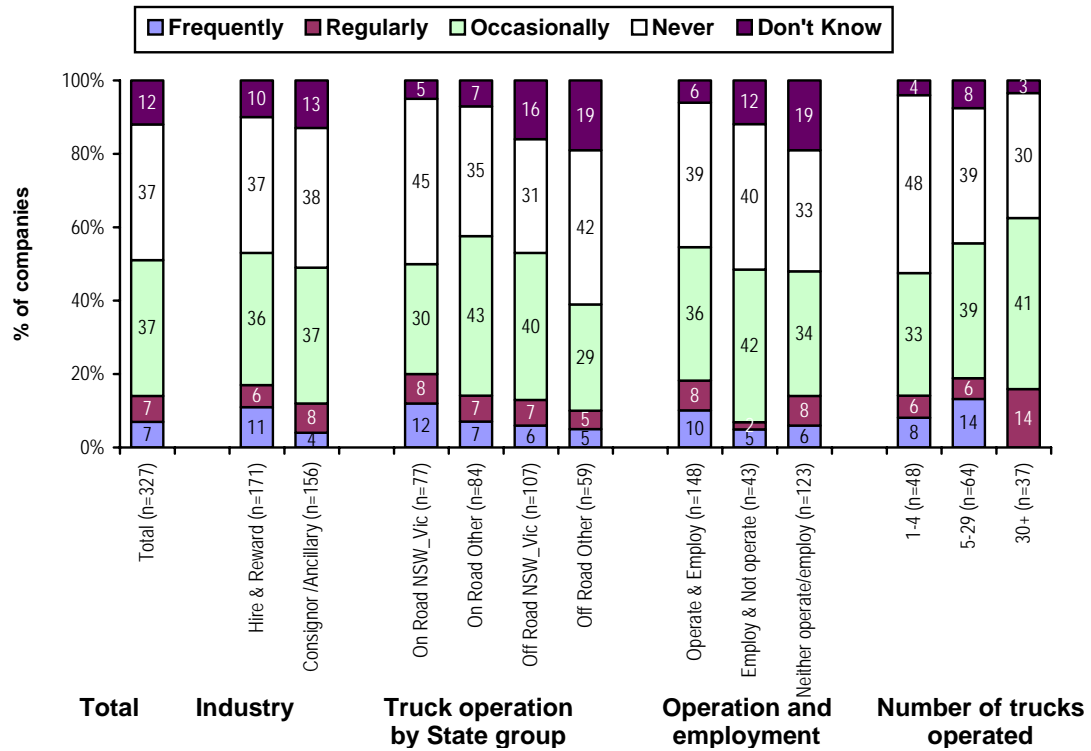
**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

Each of the incidents was considered to occur 'at least occasionally' by over 40% of companies. 'Driving over the speed limit' was the most nominated, by over half (55%) of companies.

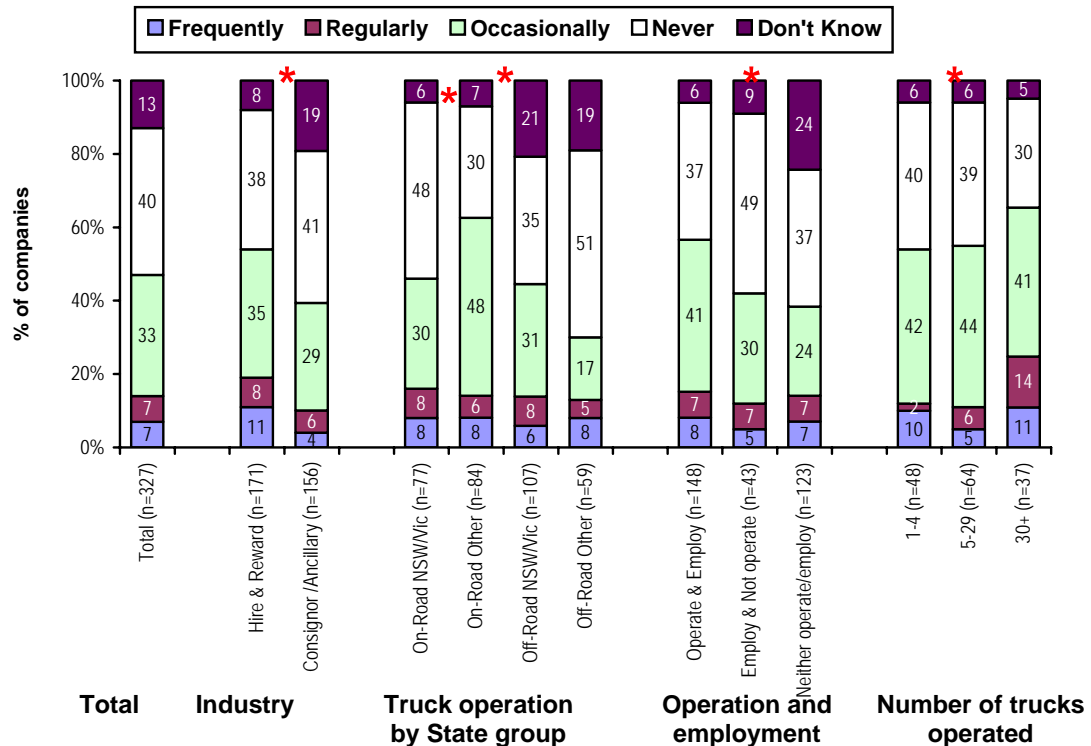
Looking at perceptions by company groups, companies that did not operate trucks were more likely to give a 'don't know' response than operators (Figure 1 to Figure 5). Overall trends for the five types of incidents were:

- **LOADS NOT PROPERLY RESTRAINED:** There were no clear differences between company groups.
- **VEHICLES LOADED OVER THEIR MASS LIMIT:** Hire and reward operators, and truck operators in general, were more likely to consider overloading to occur, and the perception was highest among operators outside NSW/Victoria. The perception was also greatest among larger operators.
- **HEAVY VEHICLES ON THE ROAD WITH DEFECTS:** Off-road companies, especially when they also did not employ drivers, were much more likely to be unsure about the frequency of this incident. The frequency of this incident was perceived to be greater by truck operators, particularly larger operators.
- **DRIVING OVER THE SPEED LIMIT:** As with the 'defects' incident, off-road companies, especially when they also did not employ drivers, were much more likely to be unsure of the frequency of this incident. The frequency of this incident was also perceived to be greater by truck operators, particularly larger operators.
- **DRIVING WITHOUT SEAT BELTS:** A substantial lack of awareness of this incident was clearly associated with companies that did not employ their own drivers.

**Figure 2. Perceived Incidence of ‘Loads Not Properly Restrained’ in the Industry**

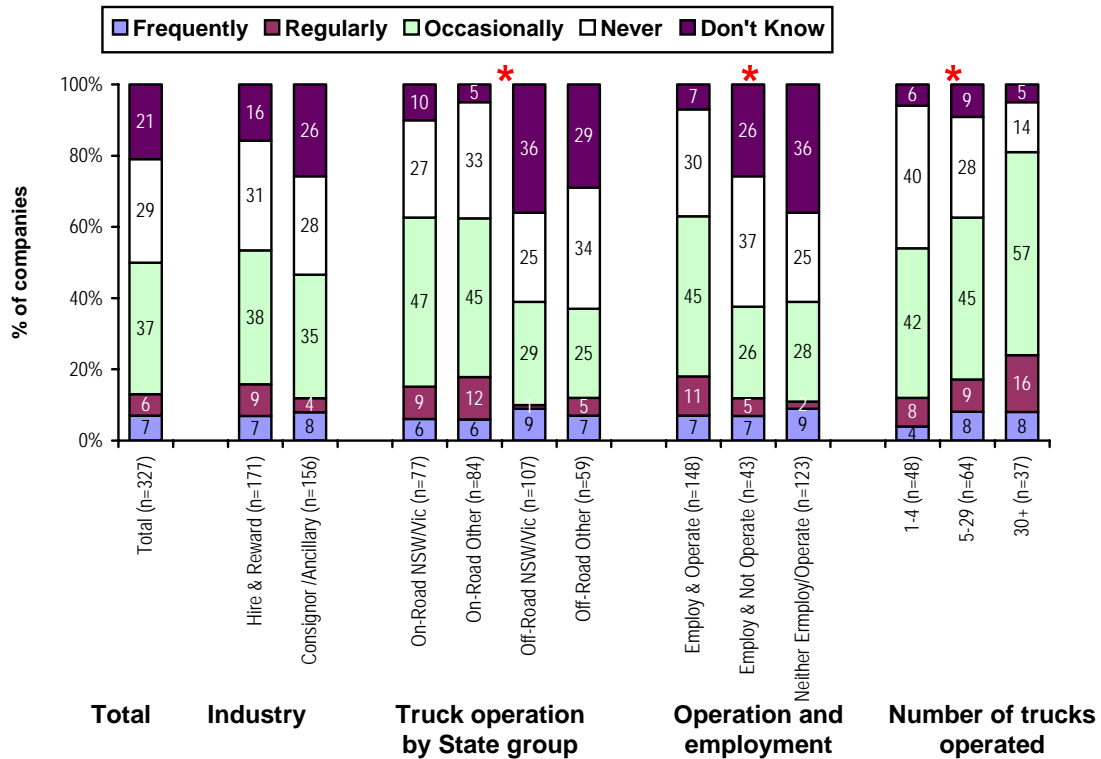


**Figure 3. Perceived Incidence of ‘Vehicles Loaded Over Their Mass Limit’ in the Industry**

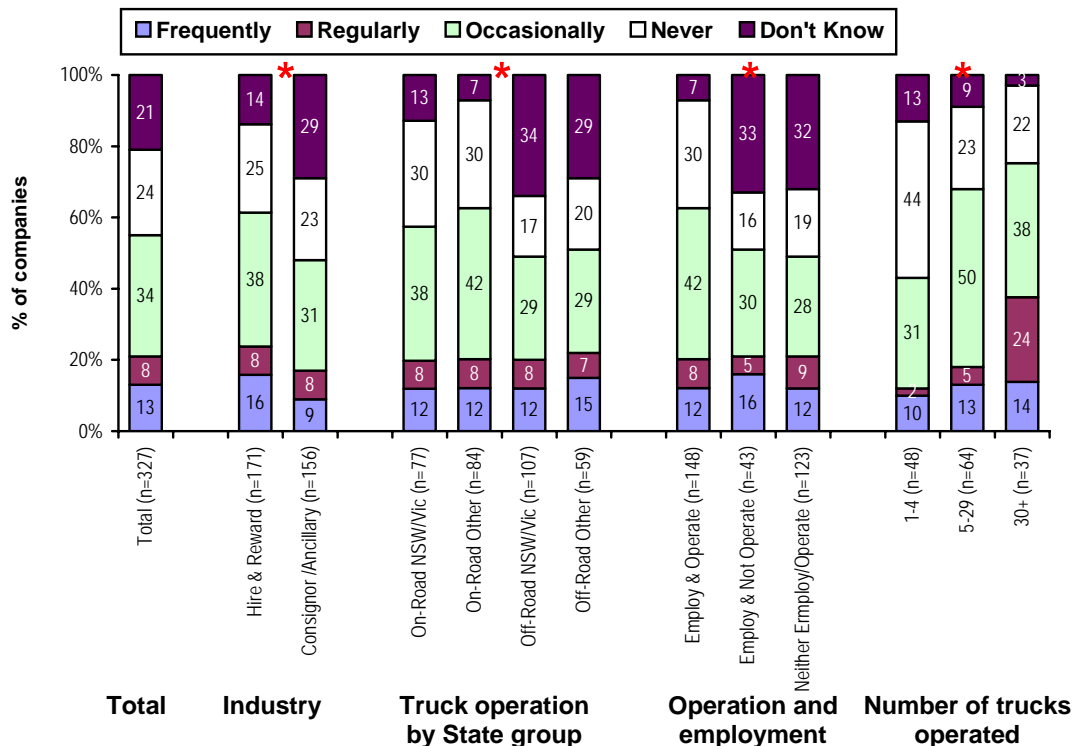


\* Statistically significant difference between groups ( $p < .05$ ).  
 Specific comparisons have also made between NSW/Vic and Other within both the On-Road and Off-Road groupings, and specific differences between the locations have been indicated.

**Figure 4. Perceived Incidence of ‘Heavy Vehicles on the Road with Defects’ in the Industry**

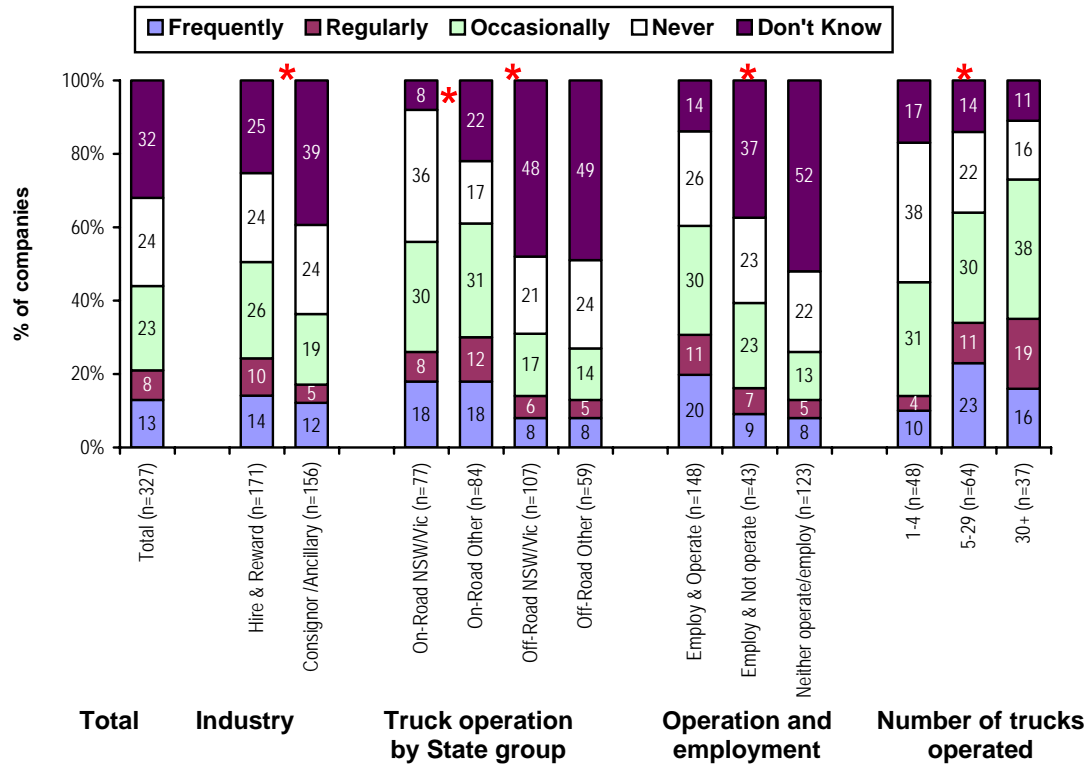


**Figure 5. Perceived Incidence of ‘Truck Drivers Driving Over the Speed Limit’ in the Industry**



\* Statistically significant difference between groups ( $p < .05$ ).

**Figure 6. Perceived Incidence of ‘Truck Drivers Not wearing Seat Belts’ in the Industry**



\* Statistically significant difference between groups ( $p < .05$ ). Specific comparisons have also made between NSW/Vic and Other within both the On-Road and Off-Road groupings, and specific differences between the locations have been indicated.

### 3.4.3 Perception of Incidents Occurring in Transporting Freight by/for Company

Companies were better able to report on the extent of these incidents when the context changed to transporting of freight by or for their company. Companies were most able to rate frequency of incidents associated with the vehicle or load, being more unsure of the frequency of ‘not wearing seat belts’ and ‘speeding’ (Table 11).

Each of the vehicle/load offences was considered to occur ‘at least occasionally’ by about a third of companies. ‘Not wearing seat belts’ was at a similar incidence, while ‘driving over the speed limit’ was seen as occurring ‘at least occasionally’ by close to half (45%) of companies.

These incidences were all lower than what was considered to be occurring in the broader industry.

**Table 11. Frequency of Incidents in Transporting by/for the Company**

Frequency	Loads not properly restrained	Vehicles loaded over their mass limit	Heavy vehicles on the road with defects	Truck drivers not wearing seat belts	Truck drivers driving over the speed limit
	%	%	%	%	%
Don't know	9	11	14	<b>23</b>	<b>21</b>
Never	<b>59</b>	<b>54</b>	<b>49</b>	40	34
Occasionally	25	<b>31</b>	<b>31</b>	26	<b>35</b>
Regularly but not frequently	3	2	3	3	6
Quite often	2	2	2	4	3
Very frequently	2	1	1	3	2
<b>At least occasionally</b>	32	36	37	37	<b>45</b>

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

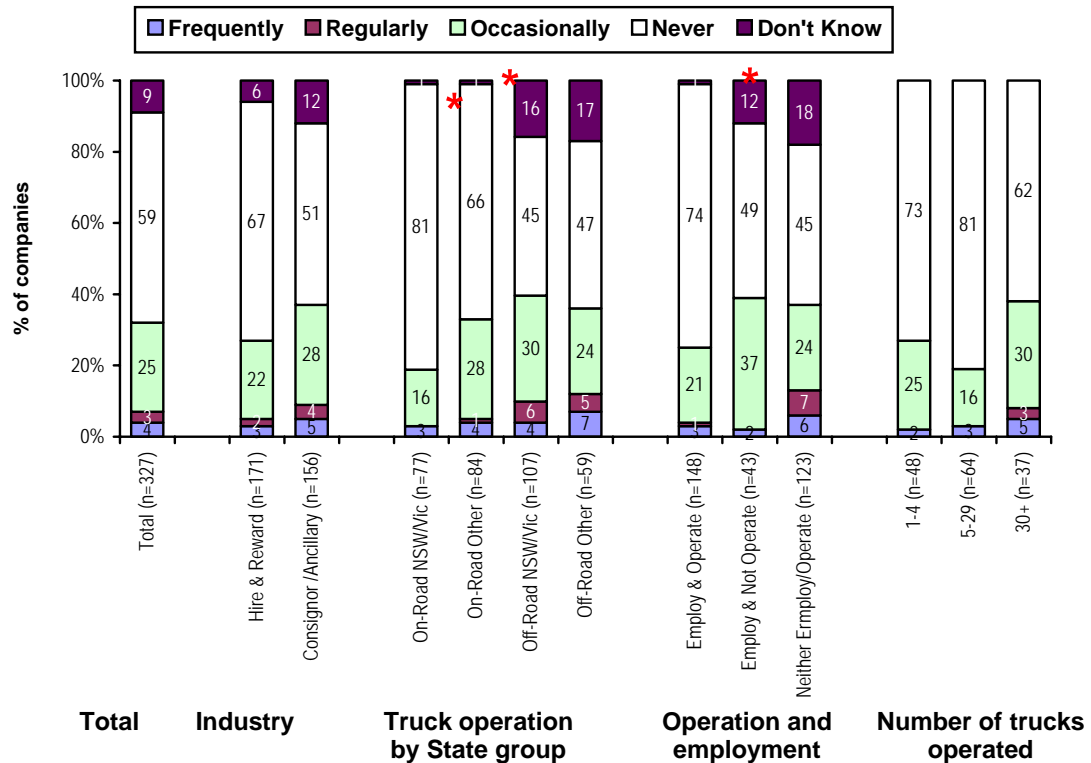
Companies that did not operate trucks, particularly those which also did not employ drivers, were again more likely to give a ‘don’t know’ response than operators (Figure 6 to Figure 10). Overall trends for the five types of incidents were:

- **LOADS NOT PROPERLY RESTRAINED:** Truck operators outside NSW/Victoria were marginally more likely to consider that this incident occurred. Interestingly, there was a trend for this incident to be seen as more frequent among companies not operating trucks (10% ‘regularly or greater’) compared with operators (4%).
- **VEHICLES LOADED OVER THEIR MASS LIMIT:** The main differences occurred in how unsure companies were about the incident, while the overall frequency of the incident was perceived similarly across groups. There was, again, a trend for the incident to be seen as more frequent among companies not operating trucks (7% ‘regularly or greater’) compared with operators (3%).
- **HEAVY VEHICLES ON THE ROAD WITH DEFECTS:** The higher incidence among off-road companies was again evident, especially for those companies outside

NSW/Victoria. Those companies not employing drivers were even more unsure than they were about the incidents associated with loads. Among operators, perception of frequency increased substantially with the size of the operator.

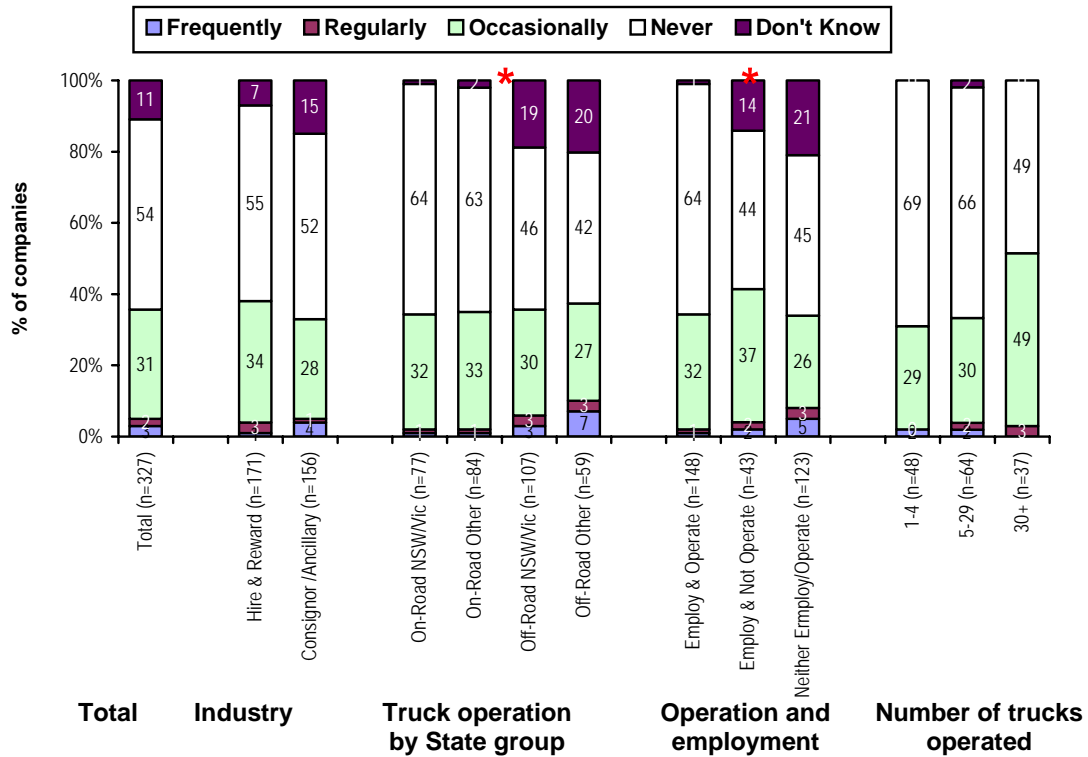
- **DRIVING OVER THE SPEED LIMIT:** Those companies not employing drivers were even more likely to be unsure about the frequency of speeding. This increased lack of awareness, however, also occurred among those companies employing drivers but not operating trucks. This pattern may relate to differences between companies in the implementation of systems in place to record speeding incidents.
- **Off-road companies** continued to be more likely to nominate the incident occurring at least ‘regularly’. Among operators, perception of frequency increased substantially with the size of the operator.
- **DRIVING WITHOUT SEAT BELTS:** Truck operators tended to be more likely than off-road companies to nominate ‘driving without seat belts’. Among operators, perception of frequency increased with the size of the operator. A substantial lack of awareness of this incident continued to be associated with off-road companies.

**Figure 7. Frequency of ‘Loads Not Properly Restrained’ in Transporting, by Company Groups**

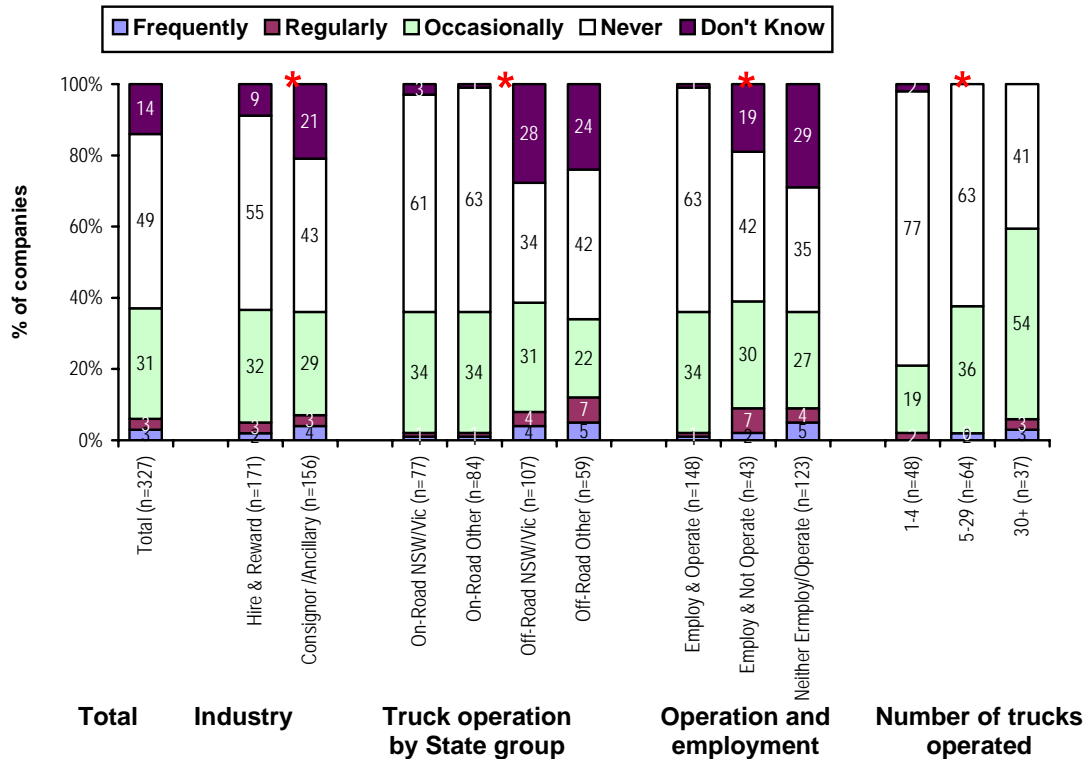


\* Statistically significant difference between groups ( $p < .05$ ). Specific comparisons have also made between NSW/Vic and Other within both the On-Road and Off-Road groupings, and specific differences between the locations have been indicated.

**Figure 8. Frequency of ‘Vehicles Loaded Over Their Mass Limit’ in Transporting, by Company Groups**

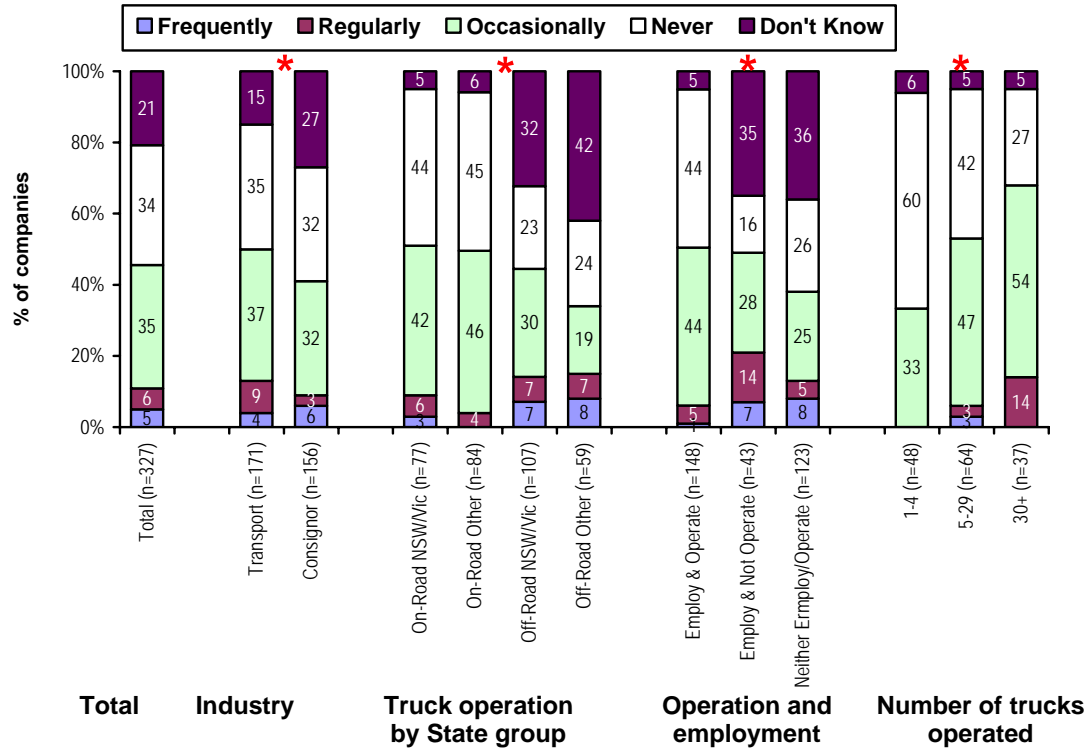


**Figure 9. Frequency of ‘Heavy Vehicles on the Road with Defects’ in Transporting, by Company Groups**

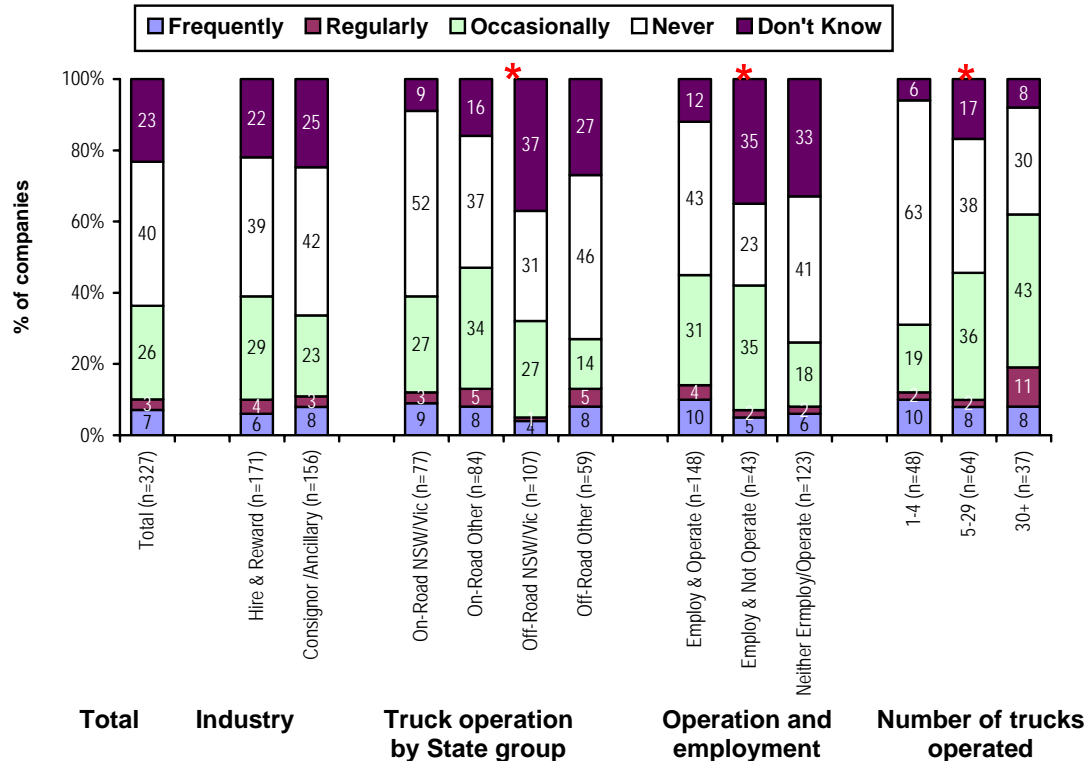


\* Statistically significant difference between groups ( $p < .05$ ).

**Figure 10. Frequency of ‘Truck Drivers Driving Over the Speed Limit’ in Transporting, by Company Groups**



**Figure 11. Frequency of ‘Truck Drivers Not wearing Seat Belts’ in Transporting by Company Groups**



\* Statistically significant difference between groups ( $p < .05$ ).

### 3.4.4 Incidence of Infringements

Among companies operating trucks, a quarter reported an infringement in the last 12 months (Table 12) for an ‘overloaded vehicle’ (27%); a ‘vehicle defect’ (27%); and a ‘speeding driver’ (22%).

Less frequent infringements were a ‘driver not wearing a seat belt’ (13%); and a ‘load not properly restrained’ (12%).

The incidence of infringements of each type increased with the number of trucks operated, which would reflect a greater chance of an offence occurring with more activity. In companies with 30+ trucks, over half reported an ‘overloaded vehicle’ infringement and a ‘vehicle defect’ infringement occurring in the last 12 months.

The incidence of infringements was generally greater among hire and reward operators than consignors. This pattern, however, was primarily a result of the difference in the distribution of number of trucks operated—hire and reward operators were more likely to operate a greater number of trucks, which was related to incidence of infringements.

Infringements associated with the vehicle or load were more likely to be reported by companies in NSW/Victoria than in the rest of Australia. As there was little difference in the distribution of number of trucks in companies in these two areas, this difference is likely to be a result of variation in enforcement practices.

**Table 12. Incidence of Drivers/vehicles Caught for Infringements in the last 12 months, by Company Groups**

BASE: All truck operators.

Infringement	Total Operators (n=161)	Industry		State Groups		Number of trucks operated		
		Hire and Reward (n=116)	Consignor/Ancillary (n=45)	NSW/Vic (n=77)	Other (n=84)	1-4 (n=48)	5-29 (n=64)	30+ (n=37)
		%	%	%	%	%	%	%
A vehicle was overloaded	27	<b>35</b>	7	<b>35</b>	20	10	30	<b>54</b>
Vehicle defect	27	<b>34</b>	7	<b>36</b>	18	8	28	<b>57</b>
A driver was speeding	22	24	16	23	20	8	23	<b>41</b>
A driver was not wearing a seat belt	12	<b>16</b>	2	13	12	6	6	<b>16</b>
A load was not properly restrained	6	8	2	<b>12</b>	1	2	5	<b>16</b>

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

Companies operating trucks were also asked about which of a number of consequences would typically apply to drivers committing an offence (Table 13).

In about three quarters (76%) of companies the driver would ‘pay the fine’, while over half (60%) of companies would ‘investigate the incident’. Other common responses were that the drivers would ‘lose their jobs after several incidents’ and where the driver would ‘get a warning’.

The pattern of responding—especially the incidence of ‘driver would pay the fine’ and ‘driver would get a warning but not pay a fine’ adding up to greater than 100%—suggests a hierarchy of implementation.

Larger operators were more likely to nominate consequences, including ‘get a warning’, and ‘investigate the incident’. Larger companies were also more likely to say that drivers would ‘pay the fine’ and would ‘lose their jobs after several incidents’.

**Table 13. Typical Consequence to Driver of Being Caught, by Company Groups**

BASE: All truck operators.

Consequence (multiple response)	Total Operators (n=161)		Industry		State Groups		Number of trucks operated		
		Hire and Reward (n=116)	Consignor/Ancillary (n=45)		NSW/Vic (n=77)	Other (n=84)	1-4 (n=48)	5-29 (n=64)	30+ (n=37)
	%	%	%	%	%	%	%	%	%
Driver would pay the fine	76	<b>80</b>	67	81	73	56	<b>88</b>	<b>84</b>	
Your company would investigate how the incident occurred	60	<b>66</b>	47	64	57	46	<b>66</b>	<b>76</b>	
Driver would lose their job after several incidents	55	59	47	55	56	46	58	<b>76</b>	
Driver would get a warning, but not pay a fine	30	31	27	32	27	33	22	<b>49</b>	
Driver would be fined after several incidents	10	<b>30</b>	11	12	8	8	9	16	
Counselling/re-training	7	11	7	5	8	4	13	3	
Depends on circumstances	4	7	7	3	6	4	5	5	
Nothing / Don't know	6	3	<b>13</b>	3	8	<b>15</b>	0	0	

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

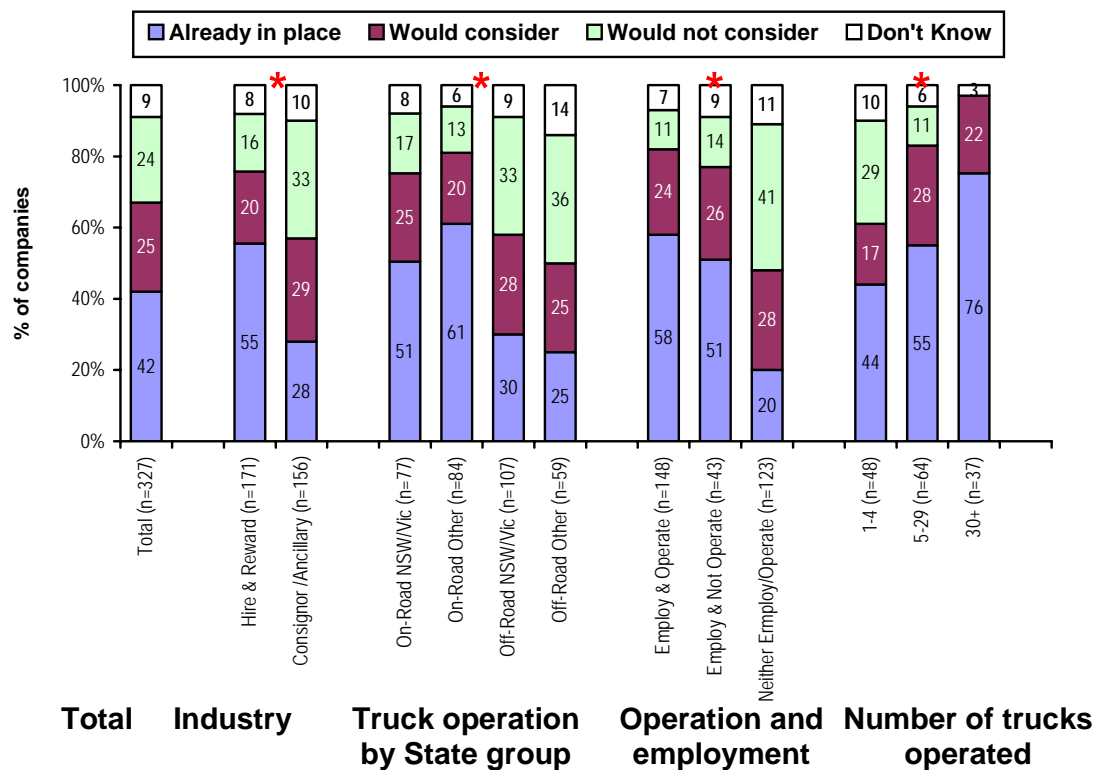
### 3.5 Practices in Place

#### 3.5.1 Industry Code of Practice

Fewer than half (42%) of the companies surveyed currently implemented an Industry Code of Practice (Figure 12). It should be noted that the term was asked broadly, and was not related specifically to the C&E Reform. The response rate to this question, however, could be used as an indicator of how many companies already have policies and procedures that may form a basis for compliance with the ‘chain of responsibility’ provisions contained in the Compliance and Enforcement Bill. Implementation was much higher among hire and reward operators (55%) than consignors (28%). This trend was related to whether the company operated trucks or employed drivers. Those companies doing neither were the least likely to have an Industry Code (20%).

Among operators, implementation increased with the number of trucks operated, to be highest among companies operating 30 or more trucks (76%). There were no differences between NSW/Victoria and the rest of Australia. In addition to the 42% of companies with an Industry Code in place, a further quarter (24%) of companies would consider adopting a Code.

**Figure 12. Use of Industry Code of Practice, by Company Groups**



\*Statistically significant difference between groups ( $p < .05$ ).

#### 3.5.2 Road Freight Transport Practices

Companies were asked which of a series of practices were currently in place in their company. About half or more companies had each of the compliance and education practices, and over a third had at least one accreditation scheme (Table 14). The most

common practices were to ‘monitor your company’s compliance with regulations’ (70%) and to ‘have systems to know the weight of the load’ (70%).

Companies operating trucks were more likely than those that did not to implement practices. This was evident across all the categories of practices being considered. Implementation also increased with the number of trucks operated. Over 90% of companies with 30 or more trucks had each of the compliance and education practices, and 86% had an accreditation scheme.

Companies not operating trucks nor employing drivers were the least likely to implement practices. Hire and reward operators were also more likely than consignors to implement, consistent with the relationship with truck operation.

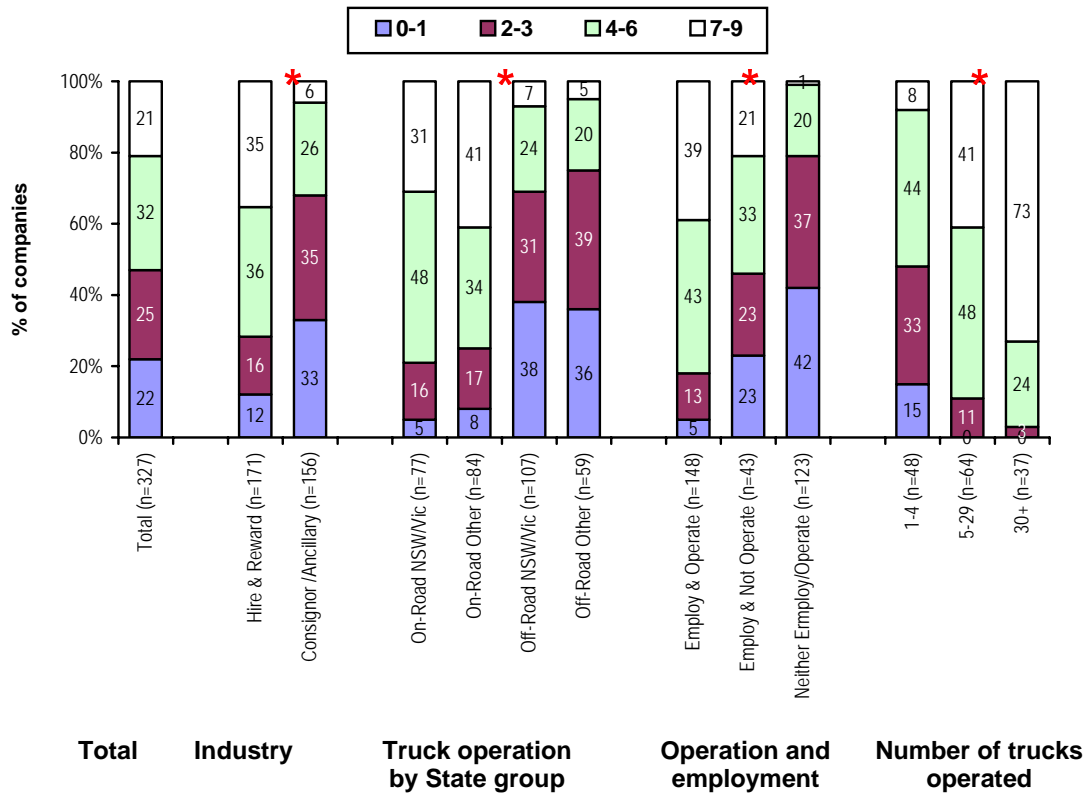
**Table 14. Incidence of Road Freight Transport Practices in Place, by Company Groups**

Practices in place (multiple response)	Total (n=327) %	Industry		Truck Operation		Operation and employment			Number of trucks operated		
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	On-Road (n=161) %	Off-Road (n=166) %	Employ and Operate (n=148) %	Employ and Not Operate (n=43) %	Neither Operate/Employ (123) %	1-4 (n=48) %	5-29 (n=64) %	30+ (n=37) %
<b>Compliance Practices (none in place = 15%, all 3 in place = 43%)</b>											
Monitor your company’s compliance with regulations	70	<b>84</b>	54	<b>86</b>	54	<b>89</b>	<b>70</b>	48	71	<b>97</b>	<b>95</b>
Have systems to know the weight of the load carried	70	<b>78</b>	62	<b>81</b>	60	<b>82</b>	<b>74</b>	54	63	<b>89</b>	<b>92</b>
Have a formal policy covering compliance with road rules	51	<b>68</b>	33	<b>72</b>	31	<b>76</b>	<b>49</b>	25	44	<b>86</b>	<b>95</b>
<b>Education Practices (none in place = 38%, all 3 in place = 40%)</b>											
Provide training on load restraints	54	<b>71</b>	35	<b>79</b>	30	<b>82</b>	<b>53</b>	21	65	<b>84</b>	<b>97</b>
Provide education about road safety	49	<b>68</b>	29	<b>72</b>	29	<b>78</b>	35	20	60	<b>83</b>	<b>92</b>
<b>Accreditation Schemes (none in place = 61%, at least 1 in place = 39%)</b>											
In the National Heavy Vehicle Accreditation scheme	20	<b>31</b>	8	<b>36</b>	5	<b>38</b>	16	2	15	<b>34</b>	<b>68</b>
In the Truck Safe program	17	<b>26</b>	8	<b>29</b>	6	<b>32</b>	16	2	13	<b>33</b>	<b>51</b>
In another accreditation or best practice scheme	25	29	21	<b>33</b>	19	<b>34</b>	21	18	25	33	49

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

There was little difference between NSW/Victoria and the rest of Australia in implementation of practices. This is illustrated in Figure 13 summarising the number of all practices/schemes/codes in place (ranging from 0 to 9).

**Figure 13. Number of Practices/Schemes in Place, by Company Groups**



\* Statistically significant difference between groups ( $p < .05$ ).

### 3.6 Attitudes to Road Freight Transport Issues

Companies were presented with a number of statements about compliance and enforcement. Greatest agreement occurred for accepting responsibility to 'promote road safety to employees and contractors', with over three quarters (81%) agreeing (Figure 14). On the road safety theme, about a third of companies agreed that it is 'intrusive to make drivers wear seatbelts'; and one in six agreed that it is safe to travel 'up to 10 km/h over the speed limit'.

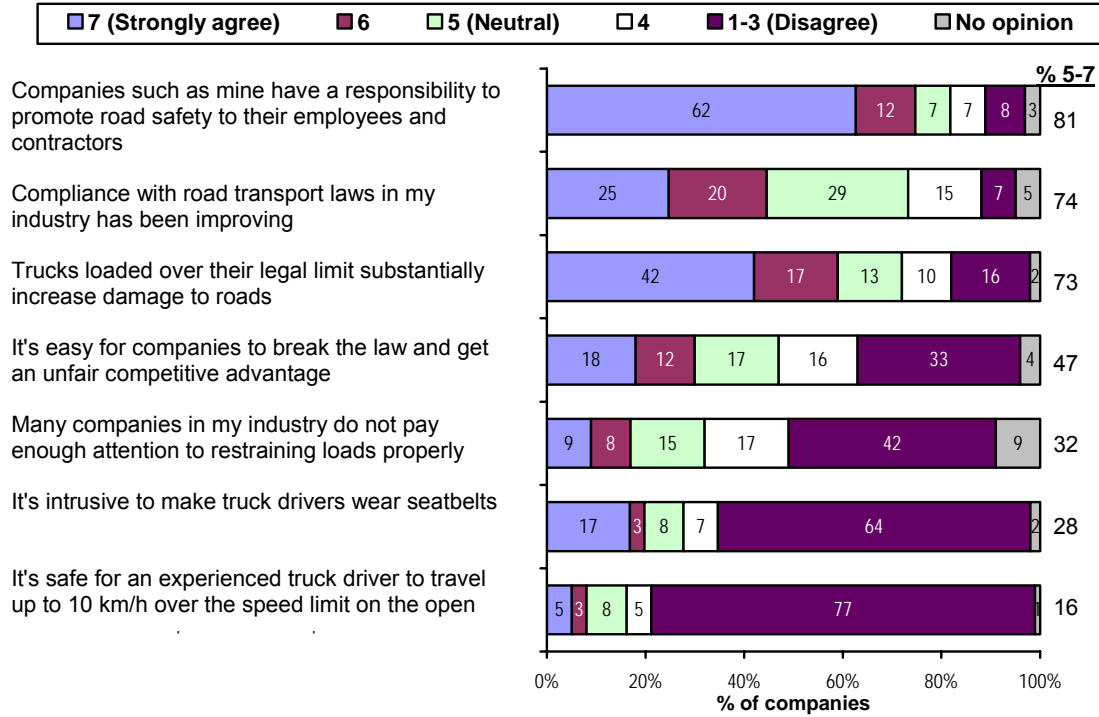
About three quarters of companies agreed that 'compliance is improving' in their industry, although few strongly agreed. Within this theme, about three quarters (73%) agreed that 'overloading increases damage to roads'; about half (47%) agreed that it is easy for companies to get an 'unfair advantage' through breaking laws; and a third of companies agreed that 'many companies do not restrain loads properly'.

Companies operating trucks were more likely than off-road companies to agree to all but two of the statements. (Table 17). This applied to the more positive statements, such as 'responsibility to promote road safety' but also to more negative statements such as agreeing that a truck driver can 'drive up to 10 km/h over the limit'. Interestingly, truck

operators were less likely to agree that overloaded trucks ‘substantially increase damage to roads’. This resistance was even more strongly expressed among operators with 30+ trucks, with only 41% of this group agreeing to the statement.

**Figure 14. Agreement with Statements about Road Freight Transport**

NOTE: Scale of 1 to 7 used where 1 is ‘strongly disagree’ and 7 ‘strongly agree’.  
(ordered on % ‘agreeing’ – rating 5-7)



**Table 15. Agreement with Statements about Road Freight Transport, by Company Groups**

Statements (Positive agreement to each one: rating 5-7 on a 1-7 scale)	Total (n=327) %	Industry		Truck Operation		Operation and employment			Number of trucks operated		
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	On-Road (n=161) %	Off-Road (n=166) %	Employ and Operate (n=148) %	Employ and Not Operate (n=43) %	Neither Operate/Employ (123) %	1-4 (n=48) %	5-29 (n=64) %	30+ (n=37) %
Companies such as mine have a responsibility to promote road safety to their employees and contractors	81	<b>86</b>	76	<b>91</b>	72	<b>94</b>	<b>86</b>	67	85	97	92
Compliance with road transport laws in my industry has been improving	73	<b>78</b>	67	77	69	78	79	66	75	77	86
Trucks loaded over their legal limit substantially increase damage to roads	71	66	<b>78</b>	66	<b>77</b>	65	<b>84</b>	74	<b>77</b>	<b>69</b>	41
It's easy for companies to break the law and get an unfair competitive advantage	47	52	42	<b>54</b>	40	<b>55</b>	42	39	48	58	62
Many companies in my industry do not pay enough attention to restraining loads properly	32	34	29	<b>39</b>	25	<b>39</b>	30	23	31	41	43
It's safe for an experienced truck driver to travel up to 10 km/h over the speed limit on the open road	28	<b>32</b>	22	<b>33</b>	22	<b>33</b>	<b>33</b>	19	27	39	30
It's intrusive to make truck drivers wear seatbelts	16	16	16	18	15	17	19	14	15	16	22

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

### 3.7 Awareness of Change to Compliance and Enforcement Measures

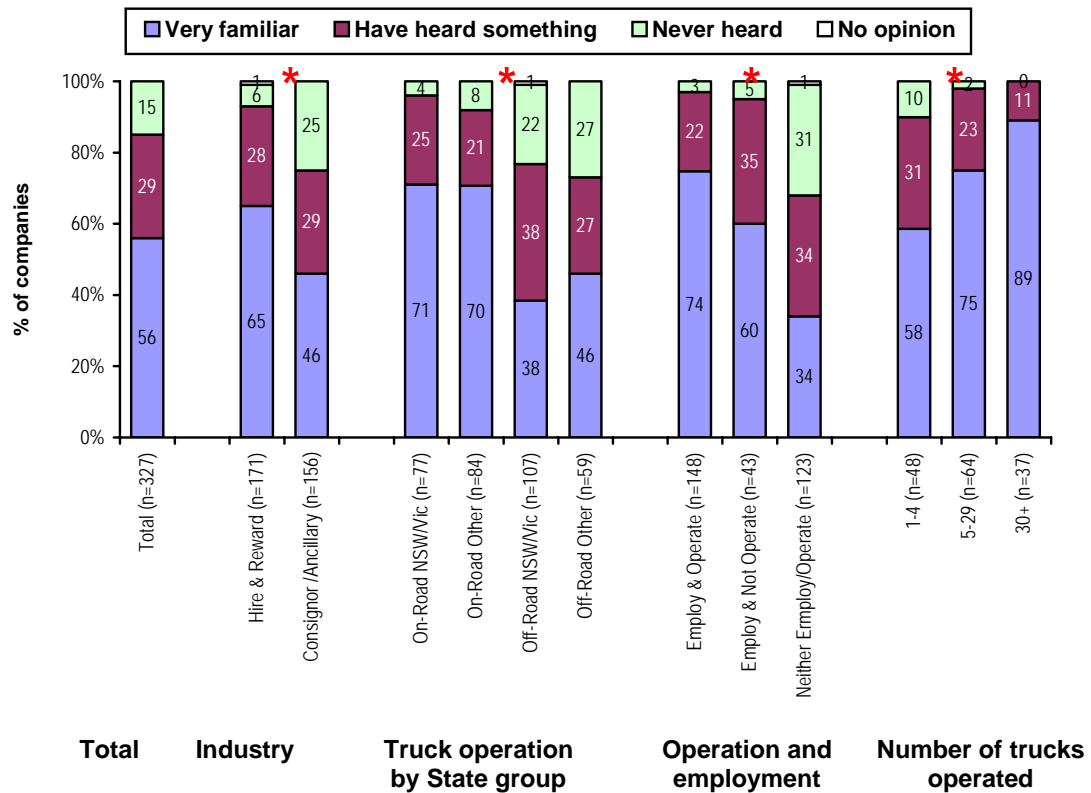
#### 3.7.1 Chain of Responsibility

About half (56%) of companies were ‘very familiar’ with the ‘chain of responsibility’ concept, as described to them in the survey (Figure 15). Familiarity was greater among companies operating trucks (71%) compared with off-road companies (41%). Familiarity also increased with the size of operator, with 89% of companies operating 30+ trucks familiar.

There was little difference in familiarity between companies in NSW/Victoria and the rest of Australia.

**Figure 15. Familiarity with a ‘Chain of Responsibility’, by Company Groups**

NOTE: Definition of ‘chain of responsibility’ given to respondents.



\* Statistically significant difference between groups ( $p < .05$ ).

#### 3.7.2 Awareness of Laws Introduced in the Last 12 Months

A number of laws were presented to respondents, focusing on elements of the ‘chain of responsibility’ framework. Large proportions (>40%) of companies considered that each of the five types of laws presented to them had been introduced in the last 12 months (Table 16). Little difference was measured between awareness in NSW/Victoria and the rest of Australia.

‘Chain of responsibility’ was the most recognised new law, nominated by 71% of companies. Awareness of the other measures ranged from 45%-58%, with the measures around ‘changes to penalties’ and ‘increased enforcement powers’ being better nominated.

Companies operating trucks tended to be more likely than off-road companies to nominate awareness of new laws, although greater awareness was more specifically among those companies employing drivers.

Awareness was not related to the size of the companies operating trucks.

**Table 16. Awareness of Road Transport Laws Introduced in the Last 12 Months, by Company Groups**

Road Transport Laws (% aware of introduction)	Total (n=327) %	Industry		Truck Operation		Operation and employment			Number of trucks operated		
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	On-Road (n=161) %	Off-Road (n=166) %	Employ and Operate (n=148) %	Employ and Not Operate (n=43) %	Neither Operate/Employ (n=123) %	1-4 (n=48) %	5-29 (n=64) %	30+ (n=37) %
The chain of responsibility	71	<b>82</b>	59	<b>81</b>	61	<b>84</b>	<b>81</b>	54	77	80	<b>97</b>
Increased powers for road transport authorities to enforce the laws	58	<b>63</b>	52	63	53	<b>62</b>	<b>65</b>	49	63	63	68
Changes to penalties for breaching road transport laws making the size of penalties better related to the severity of the offence	56	<b>61</b>	49	60	51	<b>61</b>	<b>63</b>	47	54	63	70
Changes to road transport legislation to allow targeting of those who make profits from road safety breaches	46	<b>52</b>	38	49	43	50	53	39	52	47	54
National consistency in implementation of laws and penalties	45	47	42	<b>52</b>	38	<b>52</b>	<b>53</b>	33	58	47	62

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

### 3.7.3 Agreement with the Government Introducing Measures

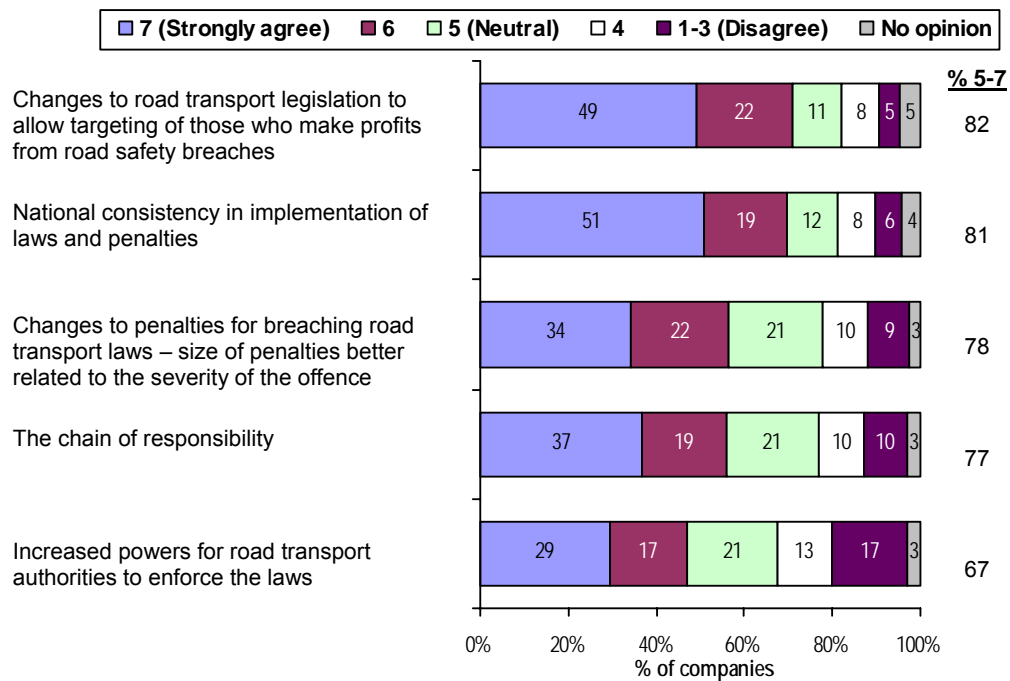
Agreement with the introduction of each type of measure was very positive. Two thirds or more of companies agreed to each one (Figure 16). The strongest agreement was received for the measures associated with greater equity: ‘national consistency in implementation of laws and penalties’ (81% agreeing, including 51% rating at the highest scale point); and changes to ‘allow targeting of those who make profits from road safety breaches’ (82% agreeing, including 49% rating at the highest scale point).

There was a general pattern for agreement with the measures to be higher among consignors than among hire and reward operators, and among off-road companies compared with companies operating trucks (Table 17).

There was, again, little difference in attitudes between companies in NSW/Victoria and those in the rest of Australia.

**Figure 16. Agreement with Government Introducing Measures**

NOTE: Scale of 1 to 7 used where 1 is ‘strongly disagree’ and 7 ‘strongly agree’. Attributes ranked in order of % ‘agreeing’ (rating 5-7).



**Table 17. Agreement with Introduction of Measures by the Government, by Company Groups**

Introduction of Government Measure (Agreement to each one: rating 5-7 on a 1-7 scale)	Total (n=327) %	Industry		Truck Operation		Operation and employment			Number of trucks operated		
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	On-Road (n=161) %	Off-Road (n=166) %	Employ and Operate (n=148) %	Employ and Not Operate (n=43) %	Neither Operate/Employ (n=123) %	1-4 (n=48) %	5-29 (n=64) %	30+ (n=37) %
Changes to road transport legislation to allow targeting of those who make profits from road safety breaches	82	78	<b>87</b>	78	86	80	84	87	81	75	84
National consistency in implementation of laws and penalties	81	78	85	76	<b>87</b>	77	84	88	75	77	73
Changes to penalties for breaching road transport laws making the size of penalties better related to the severity of the offence	78	72	<b>84</b>	73	<b>83</b>	71	77	85	75	73	62
The chain of responsibility	77	75	79	74	80	76	86	78	77	73	76
Increased powers for road transport authorities to enforce the laws	67	55	<b>81</b>	53	<b>82</b>	53	<b>77</b>	<b>84</b>	58	45	49

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

Assessing attitudes towards the introduction of measures among the activity clusters (described in Table 5), shows some finer relationships (Table 18).

Agreement with the 'chain of responsibility' was lowest in the most broadly active group of on-road companies (On-Road 1). The lower agreement may be related to a perception of increased responsibility for the company, through its broad involvement in activities.

The more positive attitude to 'increased powers to enforce laws' was quite specific to the two off-road clusters (Off-Road 1, Off-Road 2), confirming greater resistance to such powers within on-road companies. There was also a trend for these two clusters to be more positive towards 'changes to penalties'.

There was a trend for the first two on-road clusters (On-Road 1, On-Road 2) who were the most involved in transporting their 'own goods' to be less positive to 'targeting of those who make profits from road safety breaches'.

A further trend was for the off-road cluster only involved in consigning (Off-Road 2) to be most positive towards ‘National consistency in implementation’.

**Table 18. Agreement with Introduction of Measures by the Government, by Activity Clusters**

NOTE: Main activities defining the cluster are **bolded**

Introduction of Government Measure (Agreement to each one: rating 5-7 on a 1-7 scale)	Clusters					
	Total (n=327) %	<b>On-Road 1 – ALL ON-ROAD / BROAD ACTIVITIES (n=57)</b> %	<b>On-Road 2 – NOT RECEIVE (n=82)</b> %	<b>On-Road 3 – CONTRACTED/ LOGISTICS/RECEIVE (n=68)</b> %	<b>Off-Road 1 – CONSIGN/ LOGISTICS (n=61)</b> %	<b>Off-Road 2 – CONSIGN ONLY (n=59)</b> %
Changes to road transport legislation to allow targeting of those who make profits from road safety breaches	82	77	78	<u>87</u>	<u>85</u>	<u>85</u>
National consistency in implementation of laws and penalties	81	79	77	81	82	<u>90</u>
Changes to penalties for breaching road transport laws making the size of penalties better related to the severity of the offence	78	79	72	75	<u>82</u>	<u>85</u>
The chain of responsibility	77	68	<u>80</u>	<u>76</u>	<u>77</u>	<u>81</u>
Increased powers for road transport authorities to enforce the laws	67	63	58	56	<b>82</b>	<b>83</b>

**Bolded:** Higher result, with a statistically significant difference between clusters ( $p < .05$ ).

Underlined: Trends in results.

**3.7.4 Agreement that Measures will Achieve Reform Objectives**

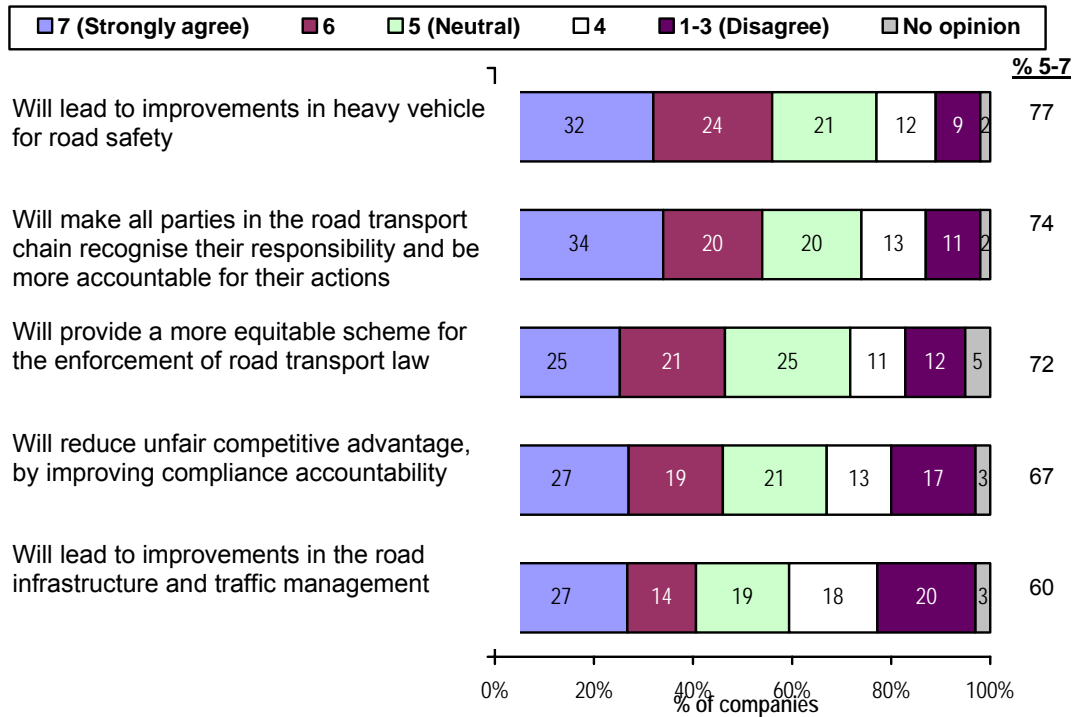
Companies were more likely to agree that the C&E Reform measures would achieve an outcome of ‘road safety’ than outcomes of ‘reducing unfair advantage’ or improvements in infrastructure/traffic management’ (Figure 17).

As with the previous questioning on acceptability of the measures, there was a general pattern for agreement with the measures to be higher among consignors than among hire and reward operators, and among off-road companies compared with companies operating trucks (Table 19). The differences in this case were not as strong. Consignors were more likely than hire and reward operators to agree with the ‘fairness’ and ‘equity’ of the measures.

There was, again, little difference in attitudes between companies in NSW/Victoria and those in the rest of Australia. The only difference measured was for off-road companies outside NSW/Victoria to agree that the C&E Reform will lead to ‘improvements in road infrastructure and traffic management’.

**Figure 17. Agreement that Measures will Achieve Reform Objectives**

NOTE: Scale of 1 to 7 used where 1 is ‘strongly disagree’ and 7 ‘strongly agree’.



**Table 19. Agreement that Measures will Achieve Reform Objectives, by Company Groups**

NOTE: Agreement=rating 5-7 on the 7 point scale

Objective (Agreement to each one: rating 5-7 on a 1-7 scale)	Total (n=327) %	Industry		Operation and employment			State Operations Groups			
		Hire and Reward (n=171) %	Consignor/Ancillary (n=156) %	Employ and Operate (n=148) %	Employ and Not Operate (n=43) %	Neither Operate/Employ (n=123) %	On-Road NSW/Vic (n=77) %	On-Road Other (n=84) %	Off-Road NSW/Vic (n=107) %	Off-Road Other (n=59) %
Will lead to improvements in heavy vehicle for road safety	77	72	83	76	74	82	73	76	81	78
Will make all parties in the road transport chain recognise their responsibility and be more accountable for their actions	74	72	76	71	77	79	57	54	62	66
Will provide a more equitable scheme for the enforcement of road transport law	72	68	<b>78</b>	67	67	80	64	59	72	75
Will reduce unfair competitive advantage, by improving compliance accountability	67	62	<b>73</b>	62	67	75	65	70	79	75
Will lead to improvements in the road infrastructure and traffic management	60	60	59	56	60	64	73	67	74	<b>86</b>

**Bolded:** Higher result, with a statistically significant difference between groups ( $p < .05$ ).

Assessing attitudes towards the effectiveness of the measures among the activity clusters (described in Table 5), shows some finer relationships (Table 20).

The off-road cluster only involved in consigning (Off-Road 2) continued to be consistently among the most positive, in particular towards reducing 'unfair competitive advantage'.

A further trend of interest was for the 'equity' of the scheme to be less positively rated by the first two On-Road clusters (On-Road 1, On-Road 2) who were the most involved in transporting their 'own goods'.

**Table 20. Agreement that Measures will Achieve Reform Objectives, by Activity Clusters**

NOTE: Agreement=rating 5-7 on the 7 point scale

Objective (Agreement to each one: rating 5-7 on a 1-7 scale)	Clusters					
	Total (n=327) %	On-Road 1 – ALL ON-ROAD / BROAD ACTIVITIES (n=57) %	On-Road 2 – NOT RECEIVE (n=82) %	On-Road 3 – CONTRACTED/ LOGISTICS/RECEIVE (n=68) %	Off-Road 1 – CONSIGN/ LOGISTICS (n=61) %	Off-Road 2 – CONSIGN ONLY (n=59) %
Will lead to improvements in heavy vehicle for road safety	77	75	72	75	<u>84</u>	<u>83</u>
Will make all parties in the road transport chain recognise their responsibility and be more accountable for their actions	74	79	75	69	72	80
Will provide a more equitable scheme for the enforcement of road transport law	72	65	65	<u>76</u>	<u>80</u>	<u>76</u>
Will reduce unfair competitive advantage, by improving compliance accountability	67	65	56	71	69	<b>80</b>
Will lead to improvements in the road infrastructure and traffic management	60	56	56	62	57	<u>68</u>

**Bolded:** Higher result, with a statistically significant difference between clusters ( $p < .05$ ).

Underlined: Trends in result.

## 4. DISCUSSION

### 4.1 Trends in Responding

As the survey required companies to answer questions about sensitive issues, such as the incidence of breaking laws or being charged with infringements, it would be expected that there would be some tendency to minimise such reporting, at least among some respondents.

In this context, the level of reported behaviour/experience may under-represent the true situation. While this is an issue in terms of assessing the *absolute* level of the results, it is still possible to look at *relative* trends in responding and assess relationships associated with these trends, for example, assessing the profile of those companies reporting infringements.

### 4.2 Company Profile

The scope of the study was around surveying a range of companies within the road freight transport industry to cover the different parts of the supply chain, other than the driver. The focus was on freight operators, freight forwarders and major consignors and ancillary operators.

The final sample of companies in the survey represents a particular mix of companies within the industry, developed through a practical and efficient sampling structure.

### 4.3 The Survey as a Baseline

This study serves as a baseline measure, capturing a national picture of attitudes 'before' the impact of the C&E Reform and national speeding and vehicle standards reforms start to take effect. Although Victoria and NSW have implemented the reform, it often takes a number of years after release of a new reform before changes in attitudes and behaviours start to filter through. Responses from NSW and Victoria are taken to represent a 'before' picture, not an 'after' picture. The widespread communication of the C&E Reform could also have affected the jurisdiction-specific aspects of the results. Furthermore, there is no true baseline measure for NSW and Victoria on which to judge any possible impact of the C&E Reform in these areas.

A further issue that impacts on assessing differences between the two locations is the way in which terms such as 'chain of responsibility', a key concept in the C&E Reform, have been used outside of NSW/Victoria, and how effectively companies are made aware of the introduction of new laws. In the qualitative phase of the research, it was clear that there was already some awareness of the concept of 'chain of responsibility' outside of NSW/Victoria. It was also clear that not all companies in NSW/Victoria had heard about the new laws being introduced as part of the C&E Reform. Some companies only heard about new laws incidentally, without having consistent access to changes in the industry. It might be expected that larger companies would keep more up-to-date on changes in the industry, through closer involvement with industry associations and participation in industry schemes (a trend confirmed in the survey), but maximising the impact of a new law will of course require awareness and understanding of the law and its consequences. More than half (61%) of companies in the survey were not part of an accreditation scheme.

While the focus of the study is as a set of baseline measures, it is still possible to assess relationships within the results which point to areas that may need attention in promoting

or selling the C&E Reform to the industry. For example, certain issues may be addressable through promotional/educational material. This could include identifying areas of the reform that currently have less positive perceptions, and groups in the industry that hold these perceptions. Improving attitudes in such areas by promoting the benefits of the reform and targeting particular groups can help contribute to the effectiveness of the reform.

#### 4.4 Compliance

Companies perceived that breaches of laws occurred more frequently in ‘the industry’ than in the course of road freight transport for/by the company. That is, there is a trend for companies to consider that the problem is not relevant to them. The ability to rate how often breaches occur was influenced by the level of involvement that companies had in the transport chain. Companies that neither operated trucks nor employed drivers were typically most likely to be unsure about the level of offending. There was, however, evidence for a more ‘honest’ assessment by the off-road companies of regular offending. These companies, despite higher levels of being unsure about the level of offending, were more likely to consider that a range of offences occurred regularly. In contrast, companies operating the trucks, and having more information, were less likely to concede that breaches occurred.

Five types of offences presented in the survey:

- overloaded vehicle;
- load not properly restrained;
- vehicle defect;
- driver speeding; and
- driver not wearing a seat belt.

The first two offences covered compliance areas specifically addressed by the current reform, while the last three covered other compliance areas. The inclusion of the additional offences gives a broader range of issues for companies to respond to, provides a better context for assessing the offences of focus in the first round of the C&E Reform, and adds to the validity of comparisons in the post-implementation research (e.g. whether incidents targeted in the reforms reduce more than those that were not?). Overall, over 40% of companies considered that each of the five types of offences presented in the survey occurred at least occasionally in transport by/for the company. The most common was ‘truck drivers driving over the speed limit’.

Among truck operators, perception of frequency of offending in transport by/for the company was greater among larger operators. This was consistent with the incidence of experiencing infringements within the company. It is possible that smaller companies simply do not perceive that breaches are occurring because there is less direct experience of infringements.

Truck operators reported on their experience with five types of infringements in the past 12 months. Comparing this experience with their perception of the frequency of breaches in transport by/for their company, produces an interesting pattern. The gap between experience of an infringement and perception of the breach occurring differed across the types of offences, as summarised below (Table 21). This difference may imply that, at least

from the experience of truck operators, levels of enforcement of certain offences are not commensurate with the incidence of these offences.

**Table 21. Truck Operators Reported Experience of Offences**

<b>Offence</b>	<b>Experience of infringement in last 12 months</b>	<b>Occurs at least occasionally in transport by/for company</b>	<b>Gap to perception</b>
Overloaded vehicle	27%	35%	8%
Vehicle defect	27%	36%	9%
Load not properly restrained	6%	26%	<b>20%</b>
Driver speeding	22%	50%	<b>28%</b>
Driver not wearing seat belt	12%	43%	<b>31%</b>

Infringements associated with the vehicle or load were more likely to be reported by truck operators in NSW/Victoria than in the rest of Australia. This difference may relate to variations in enforcement practices in the different states.

#### **4.5 Practices in Place**

A wide range of practices were currently in place in the industry. Practices were more prominent among companies operating trucks or employing drivers, and much more common among larger operators.

Overall, 42% of companies had an Industry Code of Practice in place. This incidence increased to 76% for companies operating 30 or more trucks. It should be noted that the term was asked broadly, and was not related specifically to the C&E Reform. The response rate to this question, however, could be used as an indicator of how many companies already have policies and procedures that may form a basis for compliance with the 'chain of responsibility' provisions contained in the Compliance and Enforcement Bill.

A feasible hypothesis would be that the incidence of infringements would decrease as practices are put in place. In assessing what relationships there might be between the implementation of practices and experience with compliance, a confounding problem in this baseline phase was the dual relationship between size of company and both number of practices and experience of infringements. Companies with more practices reported a greater experience of infringements. One possible influence is that such companies may have better monitoring of infringements. It may also be possible that practices being reported by companies are 'paper policies' not put into practice, although the results from the parallel drivers survey suggests that fatigue-related practices and policies are implemented into operations quite widely.

A more practical approach will be to compare the baseline results to results gathered in a future survey and look at changes in both measures. This approach will allow interpretation of how increases in practices may relate to changes in offending. Such an analysis, however, will also need to take into account changes in enforcement practices that may lead to changes in the incidence of violations being detected. The impact of practice implementation could also be tested using a case study approach, examining individual companies to measure incidence of infringements, implement practices/policies, and then measure incidence of infringements again.

## 4.6 Responsibility

Drivers and the company operating the truck were the most nominated as responsible for the three outcomes presented to companies. Drivers were the most nominated as one of the parties responsible for 'ensuring a load is properly restrained' (92%), and 'ensuring a vehicle is not overloaded' (81%); while the company operating the vehicle was the party considered most responsible for 'ensuring that a truck is not on the road with a defect' (87%). The next most nominated party was the consignor, for 'ensuring that a vehicle is not overloaded' (by 38%); while a similar proportion (33%) nominated the company operating the truck as responsible for 'ensuring a load is properly restrained'.

An impact of the C&E Reform will be to promote the responsibility of different parties in the transport chain. There was evidence in this baseline survey that companies in NSW/Victoria were more likely than companies in the rest of Australia to nominate the 'company employing the driver', the 'company organising delivery' and the 'company consigning the freight in particular situations. Analysis of future survey data will confirm whether this pattern is related to the C&E Reform.

## 4.7 Attitudes to Road Freight Transport

There was little difference in attitudes between companies in NSW/Victoria and those in the rest of Australia, even when focusing on the specific areas covered by the first round of reform. The overall pattern suggests that the C&E Reform has not yet had a measurable impact in NSW/Victoria. It would be expected that further implementation of the reform will improve the range of attitudes included in the survey, covering the different areas of the reform.

Companies operating trucks were more likely than off-road companies to agree that it is their 'responsibility to promote road safety'. Operators, however, were also more likely to agree that a truck driver can 'drive up to 10 km/h over the limit'. There is an opportunity to leverage the strong feeling of responsibility to promote road safety to improve attitudes towards specific behaviours such as speeding, at the time when the reforms are implemented around these behaviours.

Operators were also less likely to agree that overloaded trucks 'substantially increase damage to roads'. This resistance was even more strongly expressed among operators with 30 or more trucks. Truck operators in particular should be considered a target for promoting the damage that to roads caused by overloading.

## 4.8 Compliance and Enforcement Reform

### 4.8.1 Awareness

About half (56%) of companies were 'very familiar' with the overall 'chain of responsibility' concept, as described to them in the survey. In the context of the survey, this concept was not asked specifically in the context of mass, dimension, and load restraint offences. There was, again, little difference in familiarity between companies in NSW/Victoria and the rest of Australia. The qualitative research indicated familiarity with the phrase more broadly in the road freight transport industry, and the results from the survey are likely to reflect this broader familiarity.

It was found that familiarity was greater among companies operating trucks, and increasing with the size of the operation. Effective promotion of the 'chain of responsibility' should therefore include effort to reach smaller operators and off-road companies.

About half of companies also nominated awareness of the introduction of a range of other laws. It is likely that the company representatives were thinking about a range of issues/activities occurring that would not be related to the C&E Reform, or possibly to any specific law. This pattern indicates that there is a lack of specific knowledge about real change. Nevertheless, the results still reflect a valid perception of activities in the road freight transport industry. Companies operating trucks tended to be more likely than off-road companies to nominate awareness of new laws, although greater awareness was more specifically among those companies employing drivers.

This pattern of awareness gives further support to the need to promote issues about road freight transport more broadly to companies operating within the industry, especially consignors.

#### **4.8.2 Agreement**

There was substantial variation in agreement to the different aspects of the C&E Reform. The strongest agreement was received for the measures associated with greater equity:

- ‘national consistency in implementation of laws and penalties’; and
- ‘changes to allow targeting of those who make profits from road safety breaches’.

‘Increasing powers of road authorities to enforce road transport laws’ was the least popular of the measures.

Companies were most likely to see that the C&E Reform will lead to ‘improvements in heavy vehicle road safety’ and ‘recognition of more accountability’. They were less likely to see that the reform would reduce ‘unfair advantage’ or ‘improvements in infrastructure/traffic management’.

Given the stronger acceptance of measures associated with greater equity, it is likely that acceptance of the reform will be improved through increasing the perception that the reform will reduce ‘unfair advantage’.

It may also be possible to leverage the greater agreement with the equity measures to improve acceptance of ‘increasing powers’ by showing how such powers will contribute to greater equity.

There was a general pattern for agreement with the measures and likelihood of the measures meeting objectives to be higher among consignors than among hire and reward operators, and among off-road companies compared with companies operating trucks. This pattern indicates that there should be more attention to promoting the benefits and effectiveness of the reform to hire and reward operators and operators in general.

## **5. CONCLUSION**

The results of the study provide a baseline for measures of awareness, attitudes and behaviour of companies in the context of compliance with road safety standards. Changes in these measures at some later stage can be used to assess the effectiveness of heavy vehicle road safety reforms and the C&E Reform in meeting its objectives.

## 6. REFERENCES

National Transport Commission. (2002) *Compliance and Enforcement Bill Fact Sheet*. Available: <http://www.ntc.gov.au/DocView.aspx?page=A02106705308680020>

National Transport Commission. (2003) *Revised Road Transport Reform (Compliance and Enforcement) Bill. Absolute liability and the reasonable steps defence*. Available: <http://www.ntc.gov.au/DocView.aspx?page=A02200608408520020>

## APPENDIX – QUESTIONNAIRE

### SAMPLE

#### State

- 1 NSW
- 2 Victoria
- 3 Queensland
- 4 OTHER

#### Industry

##### *Hire and Reward*

- 1 Freight companies
- 2 Freight Forwarding

##### *Consignors*

- 5 Agriculture
- 6 Manufacturing
- 7 Wholesaling
- 8 Retail
- 9 Building and Construction

### LOCATIONS

- 1 NSW – Transport
- 2 Vic – Transport
- 3 Qld – Transport
- 4 Other – Transport
- 5 NSW – Consignor
- 6 Vic – Consignor
- 7 Qld – Consignor
- 8 Other – Consignor

### QUOTAS

for a total of 300 interviews

[COMBINATION OF Industry code and Q2a]

<u>ON ROAD (Q2a=1)</u>	<u>ON ROAD (Q2a=1)</u>	<u>OFF ROAD (Q2a=2)</u>
1 Trucking companies	5 Agriculture	2 Freight Forwarding
2 Freight Forwarding	6 Manufacturing	5 Agriculture
3 Services to Transport	7 Wholesaling	6 Manufacturing
4 Stevedores	8 Retail	7 Wholesaling
	9 Building and Const'n	8 Retail
		9 Building and Const'n

## PREAMBLE

TO RECEPTION: Can I please speak to your operations manager, or freight manager.  
IF NECESSARY, ASCERTAIN IF THEY:

- (1) OPERATE HEAVY VEHICLES TO TRANSPORT FREIGHT, OR
- (2) HAVE THEIR OWN FREIGHT TRANSPORTED BY HEAVY VEHICLE, OR
- (3) HAVE FREIGHT TRANSPORTED TO THEM BY HEAVY VEHICLE, OR
- (4) ORGANISE TRANSPORTING FREIGHT BY HEAVY VEHICLE

TO MANAGER: We are conducting research for the National Transport Commission on road freight transport. We are talking to companies that transport freight by heavy vehicles; or have freight transported for them by heavy vehicles. By heavy vehicles we mean over 4.5 tonnes gross vehicle mass.

The research is on day to day issues faced by businesses in transporting freight. We are talking to a range of businesses, including transport operators, consignors, wholesalers and retailers.

ASCERTAIN WILLINGNESS TO CONTINUE - ARRANGE AN ALTERNATIVE TIME IF POSSIBLE

## COMPANY PROFILE

Q1. Firstly, what is your position in within your company?

RECORD VERBATIM

Q2a. Do your company operate its own trucks or trailers?

- 1 Yes
- 2 No

IF Q2A=1, ASK Q2B

Q2b. Would any of these vehicle be of at least 12 tonnes gross vehicle mass?

- 1 Yes
- 2 No

IF Q2a=1 ASK Q3/Q4, OTHERS GO TO Q5

Q3. How many trucks and how many trailers does your company operate of more than 4.5 tonnes gross vehicle mass?

RECORD NUMBER (IF DON'T KNOW EXACT NUMBER, THEN ASK FOR APPROXIMATE NUMBER)

- 1 Trucks - none
- 2 Trucks - operate (specify)
- 3 Trailers - none
- 4 Trailers - operate (specify)

**Q4. How many of your trucks fall into each of the following categories?**

READ OUT- RECORD NUMBER FOR EACH

- 1 Rigid trucks
- 2 Semi-trailers
- 3 Truck trailers
- 4 B-doubles or triples
- 5 Road trains
- 6 Other (specify)
- 7 DO NOT READ OUT Don't know

**Q5. Does your company...**

READ OUT - MULTIPLE RESPONSE (1/3)

- 1 Employ its own drivers
- 2 Sub contract drivers
- 3 Have Independent owner drivers
- 4 Does not employ drivers

IF Q5=1/3 ASK Q6 - OTHERS GO TO Q7

**Q6. How many drivers does your company employ as...**

ASK FOR EACH OF 1,2,3 ANSWERED IN Q5 - DESCRIBED AS BELOW

- 1 Company drivers
- 2 Sub contractors
- 3 Independent owner drivers

**Q7. What are the main types of freight that your company is involved in transporting?**

READ OUT - MULTIPLE RESPONSE

- 1 Livestock
- 2 Refrigerated or temperature controlled
- 3 Dangerous goods
- 4 Farm produce
- 5 Other bulk (specify)
- 6 Machinery
- 7 Building materials
- 8 Groceries
- 9 Manufactured goods (specify)
- 10 General or mixed freight
- 11 Car carrying
- 12 Express freight
- 13 Any other (specify)

**Q8. What percentage of transport trips conducted by your company, or for your company, are... READ OUT**

GET % IN EACH CATEGORY TO ADD UP TO 100%  
IF UNSURE, GET AN APPROXIMATE DISTRIBUTION, OR THINK ABOUT IN THE LAST WEEK

- 1 Within a capital city metropolitan area
- 2 Interstate trips between metropolitan centres
- 3 Within a regional centre
- 4 Between regional centres, less than 100 km apart
- 5 Between regional centres, more than 100 km apart
- 6 Between metropolitan and regional areas

#### INVOLVEMENT IN PROCESSES

**Q9. There are a number of processes involved in transporting freight. Thinking about your company's , who is involved in each of the following processes? You may nominate more than one party.**

READ OUT A PROCESS - AND THEN READ OUT THE LIST OF THOSE INVOLVED  
RECORD ALL THAT APPLY

#### PROCESSES (RANDOMISE)

- 1 Working out the mass or size of the load to go on a vehicle
- 2 Selecting the vehicle for a job
- 3 Loading or unloading the vehicle
- 4 Restraining the load on the vehicle
- 5 Planning the route for a trip
- 6 Selecting the driver
- 7 Packing freight

INVOLVEMENT - DRIVER GROUPS (1,2,3) TO COME UP IF NOMINATED IN Q5)  
IF Q2=2 (TRANSPORT FOR OTHER BUSINESSES), 5 TO COME UP  
IF Q2B=3, a

- |   |  |                          |
|---|--|--------------------------|
| 1 | [IF Q5=1] Your company drivers                                 | [EMPLOY COMPANY DRIVERS] |
| 2 | [IF Q5=2] Your sub contracted drivers                          | [EMPLOY SUBCONTRACTORS]  |
| 3 | [IF Q5=3] Your independent owner drivers                       | [EMPLOY OWNER DRIVERS]   |
| 4 | A manager or director in your company                          |                          |
| 5 | Workers in your company other than drivers or managers         |                          |
| 6 | [IF Q2b=1.2.4.5] The consignor of the goods                    | [NOT ONLY A CONSIGNOR]   |
| 7 | [IF Q2b=1.2.3.4] The receiver of the goods                     | [NOT ONLY A RECEIVER]    |
| 8 | [IF Q2b=2.3.4.5] A manager in the company operating the trucks | [NOT ONLY AN OPERATOR]   |
| 9 | NOT APPLICABLE   |                          |

**COMPLIANCE - INDUSTRY PERCEPTION, EXPERIENCE**

**Q13. How frequently do you consider each of the following incidents occur within your industry? Please use a scale of... READ OUT SCALE**

**INFRINGEMENTS - RANDOMISE**

- 1 Loads not properly restrained
- 2 Vehicles loaded over their mass limit
- 3 Truck drivers not wearing seat belts
- 4 Truck drivers driving over the speed limit
- 5 Heavy vehicles on the road with defects

- 1 Never
- 2 Occasionally
- 3 Regularly but not frequently
- 4 Quite often
- 5 Very frequently
- 8 DO NOT READ OUT Don't know

**Q14. And how frequently do you consider each of the following incidents occur [IF Q2a=1: within your company] [IF Q2a=2: in companies involved in transporting goods for you].**

- 1 Loads not properly restrained
- 2 Vehicles loaded over their mass limit
- 3 Truck drivers not wearing seat belts
- 4 Truck drivers driving over the speed limit
- 5 Heavy vehicles on the road with defects

- 1 Never
- 2 Occasionally
- 3 Regularly but not frequently
- 4 Quite often
- 5 Very frequently
- 8 DO NOT READ OUT Don't know

IF Q2a=1 CONTINUE WITH Q15a/b, OTHERS GO TO Q15c

**Q15a. In the past 12 months, have any of your drivers or vehicles been caught for each of the following infringements? READ OUT AND CODE FOR EACH ONE**

**INFRINGEMENTS - RANDOMISE**

- 1 A load was not properly restrained
- 2 A vehicle was overloaded
- 3 A driver was not wearing a seat belt
- 4 A driver was speeding
- 5 Vehicle defect

**SCALE**

- 1 No
- 2 Yes - once only
- 3 Yes - more than once [ASK APPROXIMATE NUMBER, OR RECORD DESCRIPTION, eg, rarely, often]
- 4 Yes - no information about frequencies
- 5 Don't know

**Q15b. If a driver was caught committing an offence, which of the following would typically happen to the driver?**

READ OUT 1/7, CODE ALL THAT APPLY

- 1 The driver would pay the fine
- 2 The driver would lose their job after several incidents
- 3 The driver would get a warning, but not pay the fine
- 4 The driver would be fined after several incidents
- 5 Your company would investigate how the incident occurred
- 6 Some other action would be taken (specify)
- 7 Nothing would happen
- 9 DO NOT READ OUT Don't know

ASK ALL

**Q15c. Next, I would like you to tell me which parties you consider typically have responsibility for a range of requirements for heavy vehicles.**

The 5 parties are READ OUT PARTIES

Firstly, which of these parties would typically have responsibility for...

REQUIREMENTS - RANDOMISE

- 1 Ensuring a load on a truck is properly restrained
- 2 Ensuring that a vehicle is not loaded over its legal weight
- 3 Ensuring that a truck is not on the road with a defect

PARTIES

- 1 The driver of the truck
- 2 The company that operates the truck
- 3 The company that employs the driver
- 3 The company organising the freight to be delivered
- 4 The consignor of the freight being carried
- 5 The receiver of the freight being carried
- 9 DO NOT READ OUT None of these

**PRACTICES**

**Q16a. We are interested in finding out what practices your company might have in place to deal with the various requirements for road freight transport.**

**Does your company do any of the following:**

READ OUT - RECORD ALL THAT APPLY

PRACTICES

- 1 Have a formal policy covering compliance with road rules
- 2 Monitor your company's compliance with regulations
- 3 Have systems to know the weight of the load being carried by the truck
- 4 Provide education about road safety
- 5 Provide training on load restraints
- 6 In the National Heavy Vehicle Accreditation scheme
- 7 In the Truck Safe program
- 8 In another accreditation or best practice scheme

SCALE

- 1 Yes
- 2 No
- 3 Don't know

Q16b. Does your company currently use an industry code of practice in regard to road freight transport and road safety?

- 1 Yes
- 2 No
- 3 Don't know

IF Q16b=1 GO TO Q17

Q16c. Would you be interested in using an industry code of practice?

- 1 Yes
- 2 No
- 3 Don't know

### ATTITUDES

Q17. Now thinking about the various requirements for heavy vehicles and I am going to read out a list of statements about road freight transport. Please tell me the extent you disagree or agree with each statement. Please use a scale of 1 to 7 where 1 is 'strongly disagree' and 7 is 'strongly agree'.

#### STATEMENTS - RANDOMISE

- 1 Trucks that are loaded over their legal limit substantially increase damage to roads
- 3 Many companies in my industry do not pay enough attention to restraining loads properly
- 4 Compliance with road transport laws in my industry has been improving
- 5 It is easy for companies to break the law and get an unfair competitive advantage
- 6 Companies such as mine have a responsibility to promote road safety to their employees and contractors
- 7 It is safe for an experienced truck driver travel up to 10 km/h over the speed limit on the open road
- 8 It is intrusive to make truck drivers wear seatbelts

#### SCALE

- 1 Strongly disagree
- ...
- 7 Strongly agree
- 8 Do not have an opinion

### AWARENESS OF CHANGE, ATTITUDE TO CHANGE

Q18. How familiar are you with the following... READ OUT:

*A 'chain of responsibility' - where liability for road law offences extend to all parties who have any control or influence on aspects of freight transport that affect compliance with road transport laws, that is, not just focused on truck drivers and truck operators*

Would you say that you are...

- 1 Very familiar with the chain of responsibility
- 2 Have heard something about it
- 3 Or have never heard of it
- 4 DO NOT READ OUT No opinion

**Q19. Are you aware of any of the following occurring around road transport laws over the last 12 months?**

**MEASURES**

- 1 The chain of responsibility
- 2 Changes to penalties for breaching road transport laws - making the size of penalties better related to the severity of the offence
- 3 National consistency in implementation of laws and penalties
- 4 Increased powers for road transport authorities to enforce the laws
- 5 Changes to road transport legislation to allow targeting of those who make profits from road safety breaches

**AWARENESS**

- 1 Yes
- 2 No
- 3 Don't know

**Q20. To what extent do you agree or disagree with governments introducing each of these types of measures? Please use a scale of 1 to 7 where 1 is 'strongly disagree' and 7 is 'strongly agree'.**

Firstly... READ OUT EACH MEASURE

**MEASURES**

- 1 The chain of responsibility
- 2 Changes to penalties for breaching road transport laws - making the size of penalties better related to the severity of the offence
- 3 National consistency in implementation of laws and penalties
- 4 Increased powers for road transport authorities to enforce the laws
- 5 Changes to road transport legislation to allow targeting of those who make profits from road safety breaches

**SCALE**

- 1 Strongly disagree
- ...
- 7 Strongly agree
- 8 Do not have an opinion

**Q21. To what extent do you think that these measures will achieve each of the following. Please use a scale of 1 to 7 where 1 means 'does not apply' and 7 means 'applies very well'.**

Firstly... READ OUT

**OUTCOMES - RANDOMISE**

- 1 They will lead to improvements in heavy vehicle for road safety
- 2 They will lead to improvements in the road infrastructure and traffic management
- 3 They will reduce unfair competitive advantage, by improving compliance accountability
- 4 They will provide a more equitable scheme for the enforcement of road transport law
- 5 They will make all parties in the road transport chain recognise their responsibility and be more accountable for their actions

**Q22. And finally, what would you like to see happening in the road transport industry to help compliance with the laws?**

RECORD VERBATIM

That's the end of the interview. Thank you for your time. As this is market research, it is carried out in compliance with the Privacy Act and the information you provided will be used only for research purposes.

As part of quality control procedures, someone from our project team may wish to re-contact you to ask a couple of questions, verifying some of the information we just collected. In case we do need to recontact you, can I please get your name?

NAME \_\_\_\_\_

NUMBER \_\_\_\_\_

Once our validation period has finished, please be assured that your name and contact details will be removed from your responses to this survey. After that time we will no longer be able to identify the responses provided by you.