



Today's Trucks: Safer, Greener, Essential

A Survey of Consumer Attitudes

Overview



- Context
- Research
- Key findings
- Implications

Context

- Increasing environmental awareness in Australia
- Concerns about safety issues (often fuelled by negative media stories)
- To date public pressure for regulatory change in the trucking industry has been minimal but has the potential to suddenly increase due to changing public attitudes on a range of related social issues especially environmentalism
- Standards employed by manufacturers same as world standards (ie Euro 3,4), objectively high levels of safety, low levels of emissions

Purpose of the Research

- Determine key attitudes of the public towards trucks with a focus on the role of trucks, safety issues and environmental impacts
- Based on results to develop campaigns which (a) help close the gap between perceptions and reality and (b) work with government with respect to realistic and sustainable transport policies, particularly in relation to urban freight issues
- TIC is the peak industry body for truck manufacturers in Australia

Style of Research

- Quantitative study
- Answers 'what' and 'how many' style of questions rather than 'how' and 'why'
- Online questionnaire
- Open ended options for respondents to put in their opinions

Questionnaire

- 6 parts addressing
 - Road usage
 - General attitudes towards trucks
 - Attitudes towards truck drivers
 - Attitudes toward truck manufacturers
 - Environmental concerns about truck usage
 - Safety concerns about trucks

Sample

- Responses were controlled to ensure a nationally representative sample
- Quotas based on location (by state and metropolitan v region), gender and age
- 1001 valid responses

Driving experience

- 96% of respondents hold a drivers license
- 58% have held their license for over 20 years
- 34.9% of respondents had driven a truck at least once in their lives
- Males (53.4%) were more likely to have driven a truck than females (16.6%)

Experience with trucks

- Based on TIC provided definitions of light, medium and heavy, those who had driven a truck were asked to identify what type of truck they had driven

Type	Light	Medium	Heavy
%	69	46.7	21.8

Experience with trucks

- Only a minority (12.6%) had driven more than one type of truck with 3.4% having experience with all three
- Most were one off or occasional drivers eg hiring a truck to move household effects
- 3.8% had driven a truck commercially in the past year and less than 1% drove a truck on a weekly basis

Summary - sample

- Sample is representative of age groups, gender and location
- Majority of respondents are very experienced road users
- Very small number of professional drivers – insufficient numbers to skew results

Findings

- For all attitude statements the percentage responding agree/strongly agree and disagree/strongly disagree are reported
- Neutral responses are not reported in the percentages
- Tests were conducted to determine whether there were significant differences of opinion based on gender, experience with trucks and location (metropolitan v regional)

General Attitudes

- Overall respondents had a positive attitude towards trucks
- A majority agree that trucks are important for the economy, accept trucks on the road and that trucks are the most efficient option to transport most products
- A significant majority (78.9%) disagreed that trucks should be banned

Trucks in built up areas

- Support for trucks in built up areas was less strong with 50.4% agreeing that large trucks should not operate in built up areas and 53.2% agreeing that all trucks should be kept off city roads during peak hour
- Overall respondents accepted that trucks do have to operate in cities (45.6%) but would prefer them to have dedicated truck lanes (48.0%)

Driver behaviour

- Both car and truck drivers were perceived negatively however truck drivers overall were perceived as being better overall than car drivers
- For example 47.9% disagreed that truck drivers consistently obeyed the road rules however 70.5% disagreed that car drivers consistently obeyed the road rules

Manufacturers

- High level of neutral responses indicating a lack of knowledge/awareness of the operation of truck manufacturers
- 3 most positively accepted statements were truck manufacturers are: “a significant employer”, “important in supporting Australia’s export industries” and “vital for the economy to remain strong”
- 4 most negatively accepted statements were truck manufacturers are: “environmentally responsible corporate organisations”, “concerned about the environment” and “concerned about the interface between urban car traffic and urban truck traffic”/“concerned about the safety of all road users”

Environmental issues

- Trucks were seen by a majority of respondents as being a significant contributor to environmental problems
- 4.9% agreed that emissions from trucks are at acceptable levels with 54.4% disagreeing
- Overall however cars were considered worse (2.3%; 56.9%)
- Top perceived environmental impacts of trucks were noise pollution, air pollution, excessive fuel consumption and traffic congestion

Safety issues

- Only a third (33.1%) of respondents believed that trucks on the road today are generally safe with only 15% believing that most accidents involving a car and truck were caused by the car
- Little knowledge of contemporary safety features with the highest awareness being speed limiters at 24.2% of respondents
- Strong agreement that the latest safety standards should apply to all trucks (74.5%) and that trucks should be retrofitted with new safety features where possible (67.1%)

Differences between groups

- Attitudes were reasonably consistent across groups
- Least differences occurred between metropolitan and regional respondents except where questions related to trucks in built up areas
- Most differences occurred between those who had ever driven a truck and those who had never driven a truck with those who had experience being more positive inclined towards trucks and more critical of other road users

Support for regulation

- Strong support for increased regulation of trucks in terms of safety features, road use and environmental standards
- Respondents correctly identified that today's trucks were safer (63.3%) and greener (52.3%) than older trucks on the road
- Strong support for both retrofitting older trucks where possible and that governments should provide incentives to either retrofit (64.2%) or purchase newer safer trucks (73.2%)
- Support for separate truck lanes (48.0%)

Congestion and emission charges

- 24.9% agreed that *all* trucks should be charged additional fees for entering built up areas

However

- 59.6% agree that trucks should have to comply with strict environmental standards before entering built up areas with 61% agreeing that those not complying should be charged a fee
- 75.4% agree that trucks should have to comply with minimum safety standards before entering built up areas with 66.7% agree that those not complying should be charged a fee

Implications

- The survey reports on consumer perceptions
- Not all perceptions, especially in relation to safety and environmental issues, are necessarily true
- There are identifiable gaps between what is happening within the industry and what consumers perceive is happening

Environmental challenges

- Perception that trucks are a major contributor to noise pollution, air pollution and excessive fuel consumption
- Perception that truck manufacturers are not environmentally responsible
- Lack of knowledge about new environmentally friendly technologies in today's truck designs

Environmental opportunities

- Education program, inclusive of demonstrations that show the difference in emission levels between today's trucks and older trucks
- Support for policies with either direct or indirectly encourage the purchase of new trucks which meet contemporary environmental expectations
- Promotion of research and other activities being undertaken by manufacturers to minimize adverse environmental impacts of trucks

Safety challenges

- Lack of knowledge about what safety features are possible
- Perception that trucks are unsafe on the road
- Fear / discomfort of being on the road with trucks due to their size
- Negative perceptions regarding manufacturers' commitment to safety

Safety opportunities

- Education programs explaining new safety features including demonstrations of new safety features
- Support for incentives to retrofit safety features where possible
- Support for incentives to encourage the purchase of newer, safer vehicles
- Support for policies designed to reward those who conform to higher safety standards
- Promotion of research undertaken and technologies employed by manufacturers to improve the safety of today's trucks

Role of trucks challenges

- Push for greater engagement of rail and other transport options through the use of hubs
- Belief that manufacturers are not concerned about the interface between urban truck and car traffic

Role of trucks opportunities

- Greater public engagement by the TIC and members on issues relating to the interface between urban truck and car traffic
- Continued promotion of the role of trucks in multiple public forums including media, education packages and stakeholder groups



Questions

