Rangahau Aotearoa
Research New Zealand

National Road Freight Industry Survey.

A Report Based on the Opinions of Businesses Involved in the Road Freight Industry in New Zealand.

April 2025

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Prepared for Transporting New Zealand

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Contents

List of Tables

List of Figures

1.0 Executive summary

This is a report about the **current state of the road freight industry in New Zealand**.

It is based on the opinions of road freight transport business owners, managers, drivers, and others directly involved in the industry, who were surveyed online between 3 and 31 March 2025.

The survey was commissioned by Transporting New Zealand, to "better understand what's important and of concern to the road freight industry, and to share [its] priorities and challenges with policy makers". The survey questionnaire was co-designed by Research New Zealand and Transporting New Zealand.

By the time the survey closed, n=194 respondents had completed the survey. Sixty per cent of respondents identified themselves as Transporting New Zealand members and forty percent as non-members. These respondents represent 128 unique companies that were identified using the 'your road freight company's name' field in the survey questionnaire.

To determine how representative respondents are of the road freight industry, we profiled them in terms of several factors, including their location, business size and freight sector(s) in which they operate. Our overall conclusion is that larger businesses are over-represented in the sample.

At the same time as the industry survey was conducted, a survey was completed with the general public. This measured how the industry was viewed by the public, given that this was one of the subject topics covered in the industry survey. The results of this survey are also presented in this report.

Key results

The key results of the industry survey are as follows:

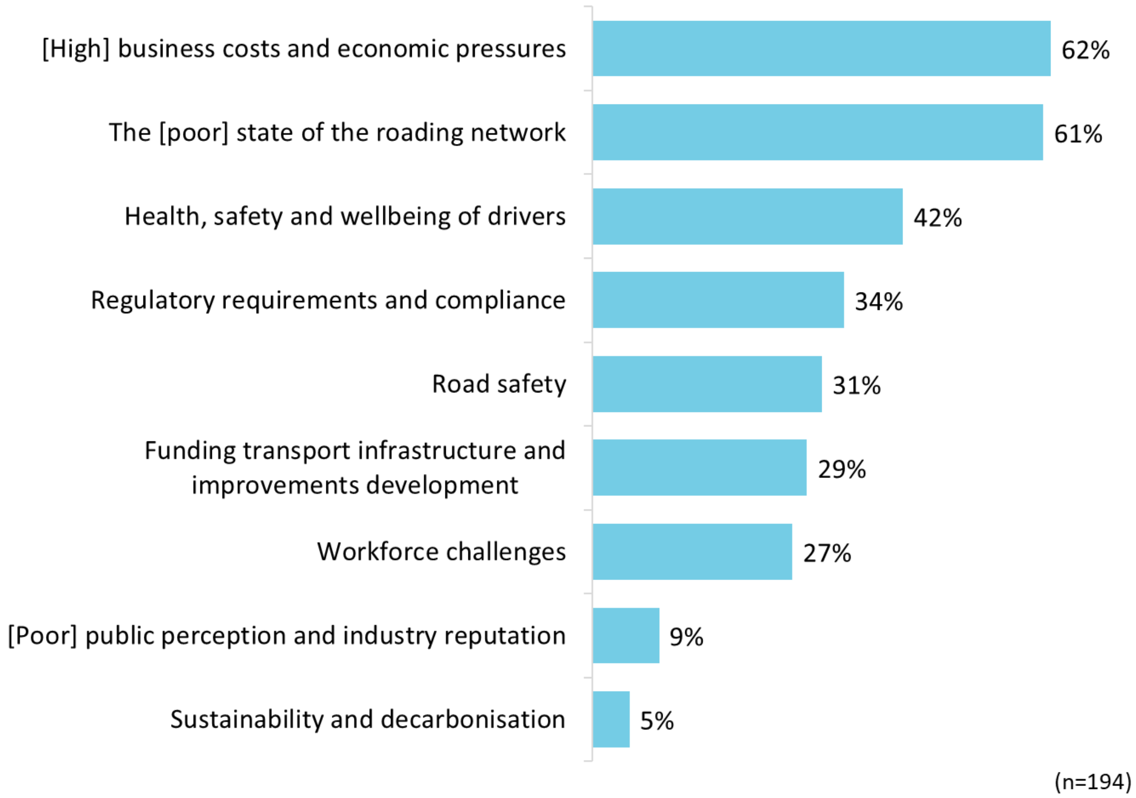
1. **[High] *business costs and economic pressures*, and the [poor] *state of the roading network*, were most frequently identified by industry respondents as the issues of most importance or concern**.

   Industry respondents were presented with a list of nine (9) potential issues and asked to identify the three that were the **most important and/or concern** to them. The issues were developed by Transporting New Zealand.

   Two of these issues were ranked in the Top 3 well ahead of the others, by **one-half or more** of respondents (Figure 1):

   - [High] *business costs and economic pressures* – 62% ranked this as one of their Top 3.
   - The [poor] *state of the roading network* – 61%.

Figure 1: The issues of most importance and/or concern

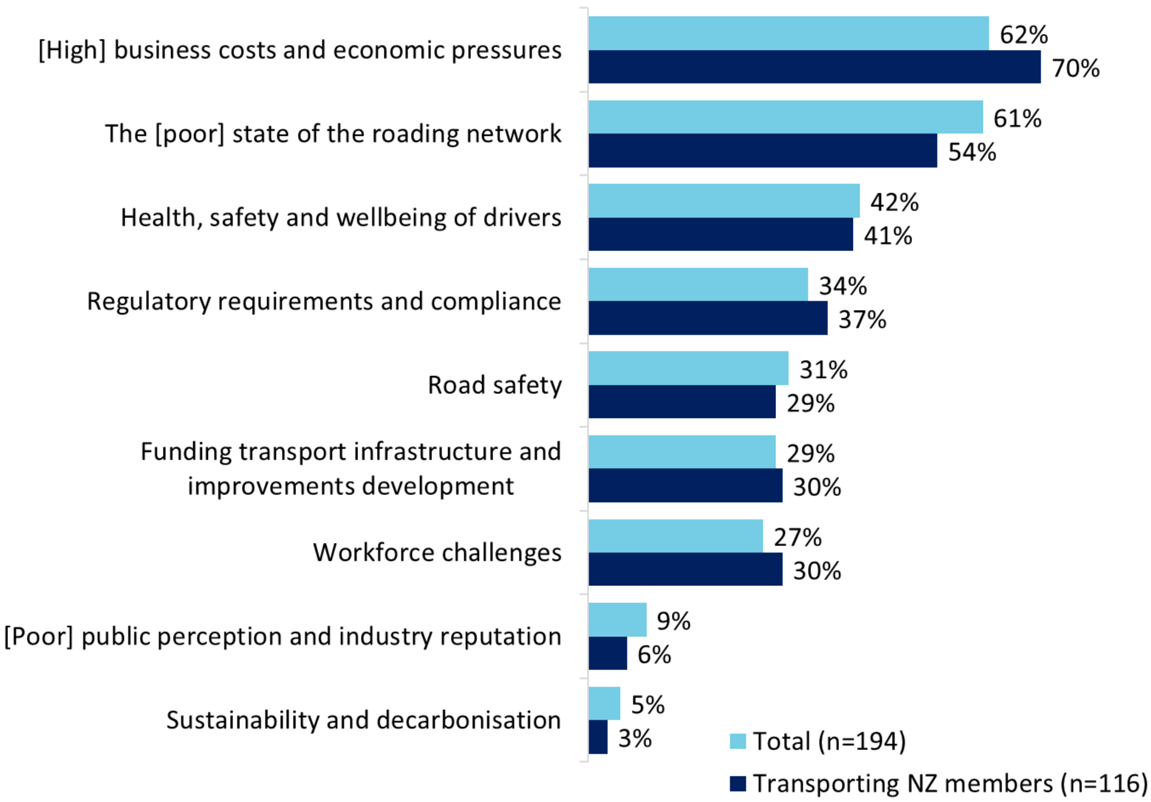


2. **Transporting New Zealand members were <u>more likely than non-members</u> to rank these issues in their Top 3, meaning that they are of greater importance or concern to them.**

At 70%, Transporting New Zealand members were more likely to rank [high] *business costs and economic pressures* in their Top 3 (cf. 62% for the total sample). This means that non-members were less likely to be concerned with this issue.

However, at 54%, Transporting New Zealand members were less likely to rank the [poor] *state of the roading network* in their Top 3 (cf. 61% for the total sample). This means that non-members were more likely to be concerned with this issue.

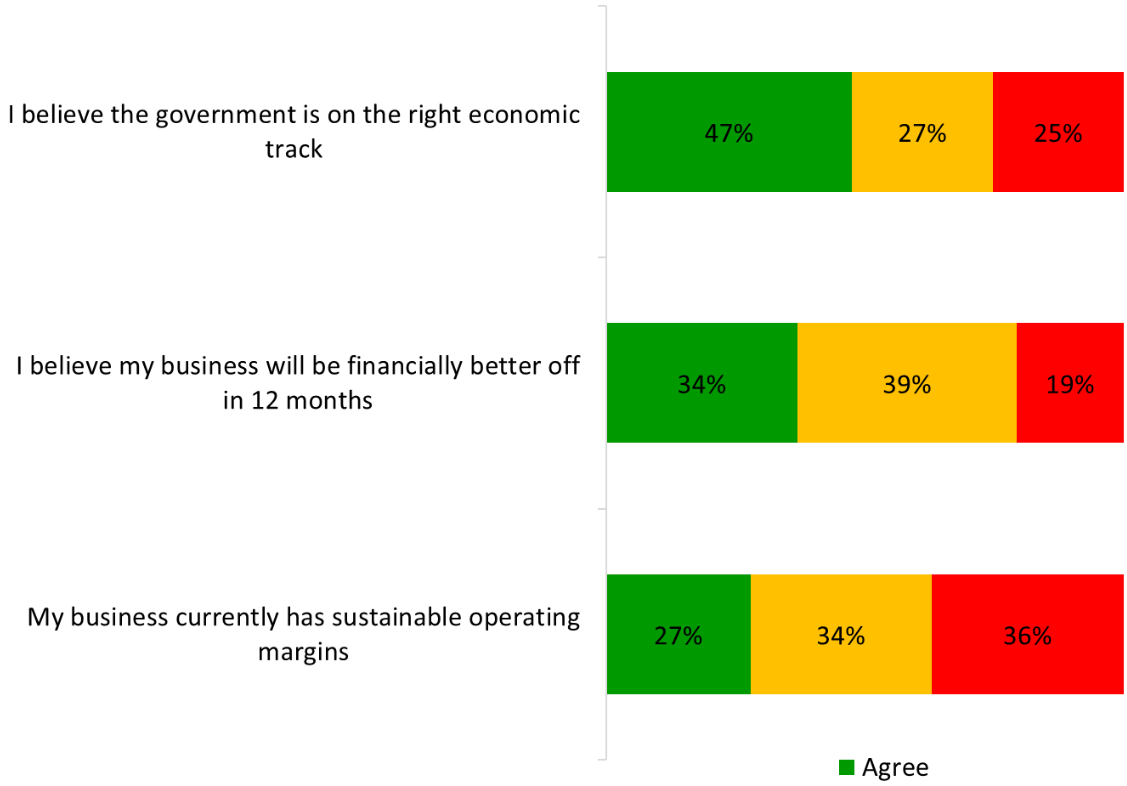
Figure 2: Issues of most importance and/or concern to Transporting New Zealand members



3. **Reflecting the concern with [high] *business costs and economic pressures*, only one-in-every-four industry respondents stated they had <u>sustainable operating margins</u> (27%)**.

   Given this situation, only 34% also stated they expected their business to be financially better off in the next 12 months.

Figure 3: Agreement with statements about [high] *business costs and economic pressures*



(n=120)

4. **A collaborative, non-partisan approach was most frequently identified as the best way to address the concern with [high] *business costs and economic pressures*.**[1]

When respondents who identified [high] *business costs and economic pressures* as one of their Top 3 issues, were asked the best way to address this issue, they most frequently suggested *industry-wide fair pricing and less undercutting* (25%), typically expressing this sentiment as follows:

> *Businesses need to stop low balling the playing field. Businesses which are taking a risk and doing things for less than cost cause issues for businesses that are trying to stay competitive. Stay within market ranges and everyone will be able to gain a margin, it will then be up to the customer which company they want to go with.*

Assuming this issue is addressed, respondents described their 'most positive outcome' in these terms:

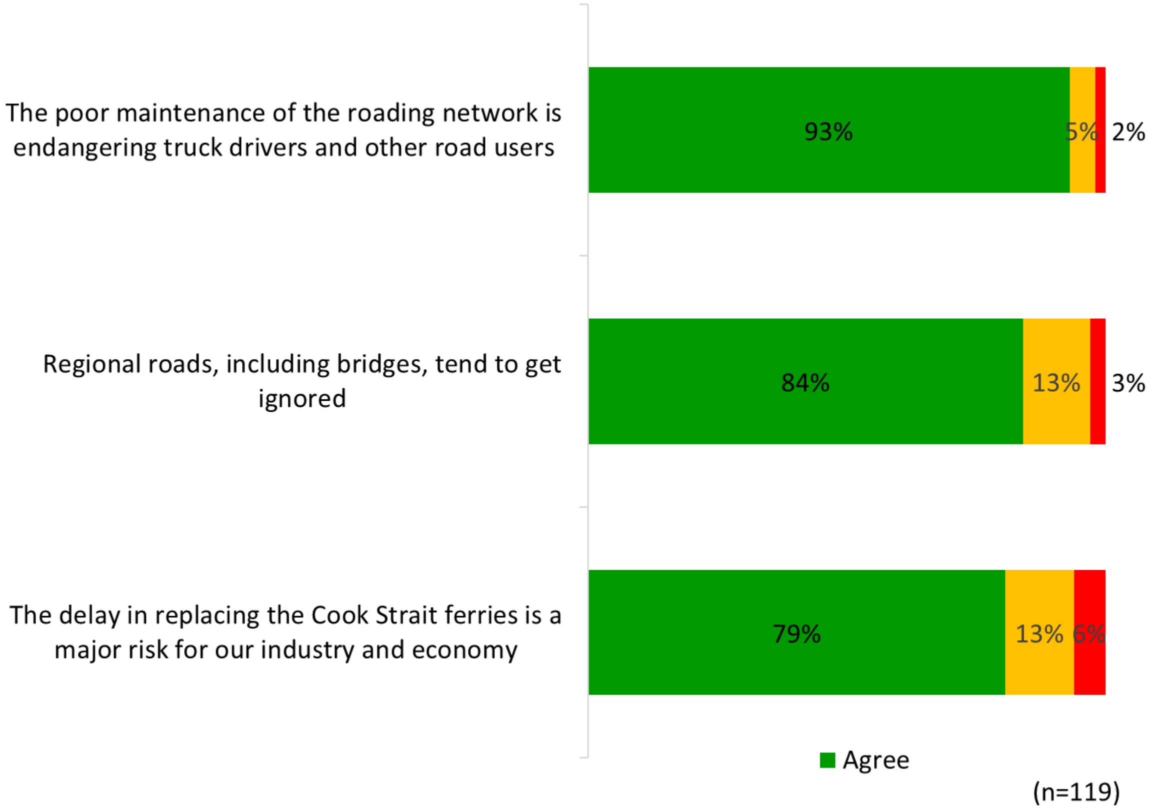
> *A sustainable and resilient road freight industry, where businesses can operate profitably despite economic pressures...A balanced cost structure would lead to long-term industry viability, reducing the risk of service disruptions and ensuring reliable freight movement across New Zealand.*

[1] Transporting New Zealand notes the importance of all industry participants complying with the Commerce Act 1986 and all applicable antitrust laws. Further information can be found through the [Commerce Commission] hyperlink https://comcom.govt.nz/__data/assets/pdf_file/0029/94088/Trade-associations-Fact-sheet-April-2021.pdf

5. **With respect to the concern with the [poor] state of the roading network, almost all industry respondents agreed that *the poor maintenance of the roading network was endangering truck drivers and other road users*.**

   Similarly, there was widespread agreement that regional roads and bridges tend to be ignored (84%), and the delay in replacing the Cook Strait ferries was a major risk (79%).

Figure 4: Agreement with statements about the [poor] *state of the roading network*



6. **A responsibility for the quality of workmanship was most frequently identified as the best way to improve the state of the roading network.**

   When respondents who identified the [poor] *state of the roading network* as one of their Top 3 issues, were asked what they thought would be the best way to address this issue, they most frequently identified (greater) *accountability (39%),* typically expressing this sentiment as follows:

   > *Stop taking the cheapest price for roading contracts. Should be on value of work done and quality of work done. Make the roading contractors and the people giving the contracts out take more responsibility for the outcome. That is, when the job fails within the first year or less, make them fix it for free and straight away. And some sort of performance pay for the NZTA people giving out these contracts. If the work keeps failing, start docking their pay for not doing their due diligence properly. It's not all about money.*

   Assuming this issue is addressed, respondents described their 'most positive outcome' in these terms:

   > *A free flowing and safe roading network that includes reliable passage across the Cook Strait.*

7. **Going forward, the industry is faced with some important workforce challenges, including those relating to the health, safety and wellbeing of drivers**.

   Forty-two percent of industry respondents rated the *health, safety and wellbeing of drivers* as an issue of importance and/or concern and as such, was the issue that was the next most frequently listed in respondents' Top 3 issues after [high] *business costs and economic pressures* and the [poor] *state of the roading network*.

   In this regard, the need for **purpose-designed rest stops** for drivers (78%) and the need to achieve **good work-life balance** for drivers (72%) were identified as being of high priority.

   Relatedly, there would appear to be several workforce challenges:

   - **Workforce gaps** – 80% of industry respondents stated they had employed drivers in the last two years. However, 22% said they had experienced **difficulties** finding drivers who were suitable.

     In order to fill workforce gaps, many had had employed drivers **new** to the industry (45%), while one-quarter had employed **overseas** drivers (27%).

   - **Workforce development** – nearly all industry respondents who had employed drivers in the last two years stated the drivers they had employed **lacked** some skill or training (91%).

     Most frequently, this related to their technical driving ability (67%) and/or their skill or training relating to vehicle maintenance, load securing and route planning (66%).

   - **Drivers exiting the industry** – almost half of industry respondents indicated that 'up to 25%' or more would retire or leave the industry in the next 5 years (47%).

8. **The industry believes the general public has a negative opinion of professional road freight drivers, but this is not true**.

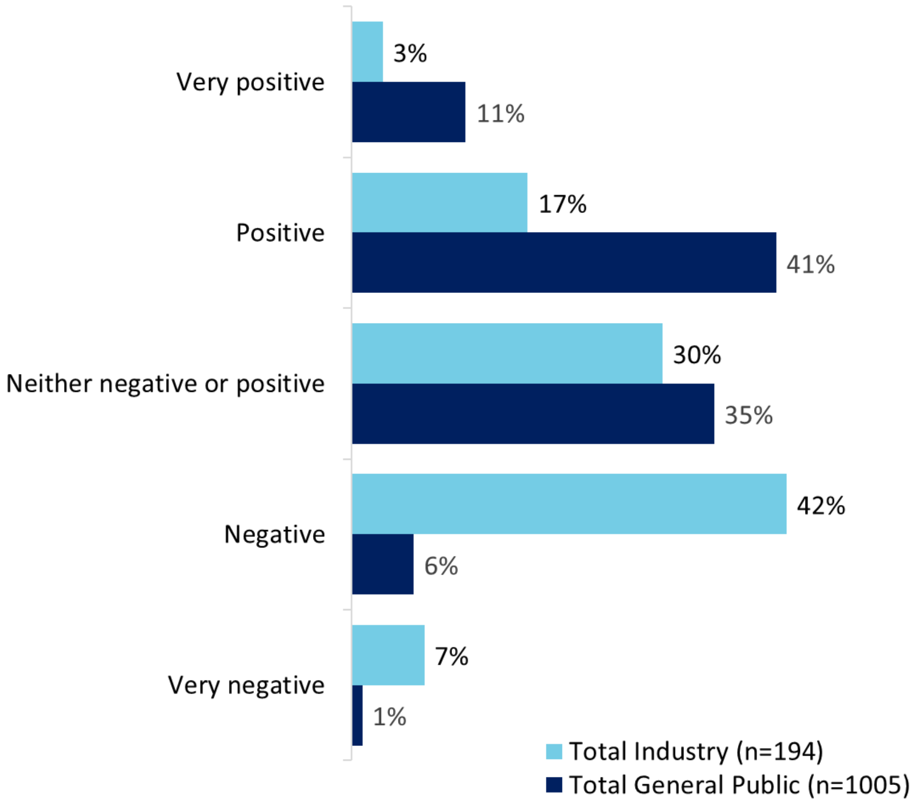
   Of the nine issues presented to industry respondents, very few ranked *public perception and industry reputation* in their Top 3 issues of importance and/or concern (9%).

Notwithstanding this, when these respondents were asked whether they agreed or disagreed with several statements about this issue, 50% agreed that their *drivers regularly experience abuse from members of the general public while working* and reflecting this, two-thirds disagreed that *public opinion of the road freight industry has improved in recent years* (67%).

As a result, almost one-half of industry respondents stated they thought the general public viewed professional road freight drivers negatively (49%) whereas, in comparison, 20% said they viewed them positively.

However, the general public itself had a completely different point of view, stating it regarded the industry positively. In fact, 52% of general public respondents said they viewed professional road freight drivers positively, with only 7% viewing them negatively.

Figure 5: Industry and general public opinions of professional road freight drivers



2.0 Survey objectives and method

This report presents the results of **two surveys**:

1. The **industry survey**, completed with road freight transport business owners, managers, drivers, and other staff directly involved in the industry in New Zealand.
2. The **general public survey**, conducted to establish how they viewed the industry.

2.1 The industry survey

The industry survey was conducted as an online survey, between 3 and 31 March 2025. The survey was positioned to respondents as a survey to help Transporting New Zealand "better understand what's important and of concern to the road freight industry, and to share [its] priorities and challenges with policy makers".

In addition to sharing the survey results with policy makers, Transporting New Zealand gave a commitment that the results would also be shared with survey participants, industry participants in general and the public.

To encourage response to this voluntary survey, Transporting New Zealand:

- directly communicated with its members by way of an email inviting them to complete the survey,
- directly communicated with its members by way of a video piece featuring its Chair,
- promoted the survey in industry publications, and
- invited everyone who completed the survey to go into a prize draw for a $500 House of Travel voucher and a $500 Bridgestone voucher.

Those involved in the industry were encouraged to pre-register for the survey and by the time the survey was launched on 3 March, almost 120 people had registered. Registration was encouraged by giving them the opportunity to win an iPad.

The questionnaire for the survey (a copy of which is attached to this report as Appendix A, together with the survey invitation and the reminder emails sent to boost the response) was co-designed with Transporting New Zealand and included:

1. A section of questions aimed at **identifying which of nine (9) issues were the Top 3** on the basis that they were 'the most important and/or of concern [to respondents]'.

   The nine issues were developed by Transporting New Zealand. As part of the process of completing our 'final checks' before the launch of the survey, the list of issues was confirmed in a workshop with Transporting New Zealand members as fairly representing the range of issues currently faced by the industry.

2. A section including questions focused on the **issue which was ranked first** (i.e., the most important and/or of concern), in order to identify what respondents considered would be:
   - The **'most positive outcome'** in relation to the issue.
   - The **'best way'** to arrive at that outcome.

3. A section focused on **workforce challenges**.
4. A section focused on industry opinions of the **general public's perceptions** of the industry.

By the time the survey closed, n=194 had responded to the survey. This was after two reminder emails had been sent to Transporting New Zealand members and those who had registered. Registrants were also reminded by telephone.

Appendix B provides a profile of the respondents to the industry survey. In order to determine how representative respondents are of the road freight industry, we profiled them in terms of several factors, including their location, business size and freight sector(s) in which they operate. Our overall conclusion is that larger businesses are over-represented in the sample.

In this report, these respondents are referred to as **'industry respondents'**.

2.2 The General Public survey

Given the relatively small number of questions covered by the general public survey, for cost-efficiency reasons, the interviewing for this survey was completed as part of an ‘omnibus’ survey operated by an online panel provider. Interviewing was conducted between 06 and 10 March 2025.

The questions focused on measuring whether the general public’s perceptions of the road freight industry were positive or negative, as well as the reasons for this, and as such, mirrored similar questions in the industry survey. A copy of the survey questionnaire can be found in Appendix C.

The survey results are based on a nationally representative sample of n=1,005 resident New Zealanders, aged 18+. As such, they are subject to a maximum margin of error of plus or minus 3.1% (at the 95% confidence level). This means that, had we found that 50% of the general public had a positive image of the industry and we subsequently repeated the survey 100 times, we would be confident of getting the same result within the range between 46.9% and 53.1% on at least 95 of those repeat surveys.

Appendix D provides a profile of the respondents to the general public survey. The achieved sample for the survey has been weighted to ensure it is representative of the population 18+ in terms of its age, gender and geographic location.

In this report, these respondents are referred to as **‘general public respondents’**.

3.0 Opinions about the most pressing issues currently facing the road freight industry

Industry respondents were presented with a list of nine (9) issues and asked to **identify the Top 3 that were 'the most important and/or of concern [to them]'**. This list was developed by Transporting New Zealand.

3.1 The Top 3 issues

Table 1 overleaf shows the extent to which each of the nine issues was identified as being in the Top 3, as well as ranked either first, second or third. The key findings are as follows:

- As an indication of their importance or level of concern, **two issues** were ranked in the Top 3 by **one-half or more** respondents. These were (in order):
  1. [High] b*usiness costs and economic pressures* – 62% ranked this as one of their Top 3.
  2. The [poor] *state of the roading network* – 61%.
- Not surprising, these issues were also the issues most frequently ranked **first**:
  1. [High] *business costs and economic pressures* – 35% ranked this as their 'most important' issue.
  2. The [poor] *state of the roading network* – 25%.
- Two other issues were mentioned by over one-third of respondents; namely:
  1. *Health, safety and wellbeing of drivers* – 42%.
  2. *Regulatory requirements and compliance* – 34%.
- We also believe it is important to report on those issues that were **not** as frequently ranked in the Top 3; namely (in ascending order):
  1. *Sustainability and decarbonisation* – 5% ranked this as one of their Top 3.
  2. [Poor] *public perception and industry reputation* – 9%.
  3. *Workforce challenges* – 27%.
  4. *Funding transport infrastructure and improvements development (i.e. tolling, RUC increases, congestion charging, additional government borrowing* – 29%.
  5. *Road safety* – 31%.

Table 1: Ranking of 'the [issues of] most importance and/or concern'

*Which of these is most important and/or of concern **to you**? Rank up to three issues, by writing 1, 2 or 3 next to them?*

Base =	One of the Top 3 issues 194 %	Ranked first 194 %	Ranked second 194 %	Ranked third 193 %
1. [High] business costs and economic pressures	62	35	11	16
2. The [poor] state of the roading network (e.g., poor road surfacing, insufficient overtaking facilities, Cook Strait ferry reliability, Desert Road closure)	61	25	22	15
3. Health, safety and wellbeing of drivers	42	16	14	12
4. Regulatory requirements and compliance	34	8	11	14
5. Road safety	31	7	13	11
6. Funding transport infrastructure and improvements development (i.e. tolling, RUC increases, congestion charging, additional government borrowing)	29	5	13	11
7. Workforce challenges	27	4	13	10
8. [Poor] public perception and industry reputation	9	-	2	7
9. Sustainability and decarbonisation	5	-	1	4

3.2 Differences by key groups

The results in Table 1 have been examined for differences by the following sub-groups of industry respondents:

- **Membership**: Transporting New Zealand members (60%) vs. non-members (40%).
- **Business size** (using the number of employed drivers as an indicator): five or fewer drivers (30%), six-30 drivers (33%) and 31+ drivers (31%).
- **Ownership status**: Owner/owner driver/manager (66%) and 'other' (34%).
- **Business location**: Upper North Island (40%), Lower North Island (29%) and South Island (31%).

Table 2 to Table 5 provide the results of this analysis and show:

- Statistically significant differences between **Transporting New Zealand members and non-members** for the following issues:
    - Transporting New Zealand members more frequently ranked, [high] *business costs and economic pressures*, in their Top 3 issues (70% cf. 50% for non-members).
    - Non-members more frequently ranked, the [poor] *state of the roading network*, in their Top 3 issues (72% cf. 54% for non-members).
- The following differences by **business size** are statistically significant:
    - Businesses with five or fewer drivers (including self-employed) more frequently ranked *funding transport infrastructure and improvements development* in their Top 3 issues (40% cf. 23% for businesses with 6-30 drivers for example).
    - Larger businesses with 31+ drivers more frequently ranked *workforce challenges* in their Top 3 issues (37% cf. 14% for businesses with 5 or fewer drivers for example).
- The following differences by **ownership status** are statistically significant:
    - Owners/owner drivers/managers more frequently ranked [high] *business costs and economic pressures* in their Top 3 issues (79% cf. 29% for ‘others’).
    - ‘Other’ industry respondents more frequently than Owners/owner drivers/managers ranked the following in their Top 3 issues:
        - *The [poor] state of the roading network* (82% cf. 51%).
        - *Road safety* (42% cf. 25%).
        - [Poor] *public perception and industry reputation* (20% cf. 4%).

- The following differences by **business location** are statistically significant:
  - Businesses located in the Upper North Island more frequently ranked [high] *business costs and economic pressures* in their Top 3 issues (69% cf. 54% for businesses located in the South Island for example).
  - Businesses located in the Lower North Island more frequently ranked the [poor] *state of the roading network* in their Top 3 issues (71% cf. 49% for businesses located in the Upper North Island for example).
  - Businesses located in the Upper North Island (51%) and the South Island (48%) more frequently ranked *health, safety and wellbeing of drivers*, in their Top 3 issues compared with business in the Lower North Island (25%).

Table 2: Ranking of Top 3 issues – By Transporting New Zealand membership

*Which of these is most important and/or of concern **to you**? Rank up to three issues, by writing 1, 2 or 3 next to them?*

Base =	One of the Top 3 issues 194 %	Transporting NZ member 116 %	Non-member 78 %
1. [High] business costs and economic pressures	**62**	**70**	**50**
2. The [poor] state of the roading network (e.g., poor road surfacing, insufficient overtaking facilities, Cook Strait ferry reliability, Desert Road closure)	**61**	**54**	**72**
3. Health, safety and wellbeing of drivers	42	41	45
4. Regulatory requirements and compliance	34	37	28
5. Road safety	31	29	33
6. Funding transport infrastructure and improvements development (i.e. tolling, RUC increases, congestion charging, additional government borrowing)	29	30	28
7. Workforce challenges	27	30	22
8. [Poor] public perception and industry reputation	9	6	14
9. Sustainability and decarbonisation	5	3	8

* Statistically significant differences are bolded.

Table 3: Ranking of Top 3 issues – By business size (number of employed drivers)

Which of these is most important and/or of concern ***to you****? Rank up to three issues, by writing 1, 2 or 3 next to them?*

Base =	One of the Top 3 issues 194 %	5 or fewer drivers (incl. self-employed) 58 %	6-30 drivers 65 %	31+ drivers 60 %
1. [High] business costs and economic pressures	62	72	58	60
2. The [poor] state of the roading network (e.g., poor road surfacing, insufficient overtaking facilities, Cook Strait ferry reliability, Desert Road closure)	61	60	65	55
3. Health, safety and wellbeing of drivers	42	38	38	48
4. Regulatory requirements and compliance	34	33	35	33
5. Road safety	31	38	31	27
6. Funding transport infrastructure and improvements development (i.e. tolling, RUC increases, congestion charging, additional government borrowing)	**29**	**40**	**23**	**28**
7. Workforce challenges	**27**	**14**	**29**	**37**
8. [Poor] public perception and industry reputation	9	3	15	7
9. Sustainability and decarbonisation	5	2	5	7

* Statistically significant differences are bolded.

Table 4: Ranking of Top 3 issues – By ownership status

*Which of these is most important and/or of concern **to you**? Rank up to three issues, by writing 1, 2 or 3 next to them?*

Base =	One of the Top 3 issues 194 %	Owner/ owner driver/ manager 128 %	Other 66 %
1. [High] business costs and economic pressures	**62**	**79**	**29**
2. The [poor] state of the roading network (e.g., poor road surfacing, insufficient overtaking facilities, Cook Strait ferry reliability, Desert Road closure)	**61**	**51**	**82**
3. Health, safety and wellbeing of drivers	42	41	45
4. Regulatory requirements and compliance	34	37	27
5. Road safety	**31**	**25**	**42**
6. Funding transport infrastructure and improvements development (i.e. tolling, RUC increases, congestion charging, additional government borrowing)	29	31	26
7. Workforce challenges	27	29	23
8. [Poor] public perception and industry reputation	**9**	**4**	**20**
9. Sustainability and decarbonisation	5	5	5

* Statistically significant differences are bolded.

Table 5: Ranking of Top 3 issues – By business location

*Which of these is most important and/or of concern **to you**? Rank up to three issues, by writing 1, 2 or 3 next to them?*

Base =	One of the Top 3 issues 194 %	Upper North Island 77 %	Lower North Island 56 %	South Island 61 %
1. [High] business costs and economic pressures	**62**	**69**	**61**	**54**
2. The [poor] state of the roading network (e.g., poor road surfacing, insufficient overtaking facilities, Cook Strait ferry reliability, Desert Road closure)	**61**	**49**	**71**	**67**
3. Health, safety and wellbeing of drivers	**42**	**51**	**25**	**48**
4. Regulatory requirements and compliance	34	30	41	31
5. Road safety	31	29	34	31
6. Funding transport infrastructure and improvements development (i.e. tolling, RUC increases, congestion charging, additional government borrowing)	29	27	32	30
7. Workforce challenges	27	32	21	25
8. [Poor] public perception and industry reputation	9	6	12	10
9. Sustainability and decarbonisation	5	6	0	7

* Statistically significant differences are bolded.

4.0 Specific opinions about each issue

After identifying and ranking their Top 3 issues, industry respondents were asked to agree or disagree with a series of statements specifically about each of their ranked issues.

A separate sub-section follows for each of the nine issues, beginning with the issue that was most frequently ranked in the Top 3 (i.e., [high] *business costs and economic pressures*).

4.1 Issue #1: [High] business costs and economic pressures

At 62%, the issue that was ranked most frequently in industry respondents' Top 3 was, [high] *business costs and economic pressures*. The statements relating to this issue were:

- *I believe the government is on the right economic track.*
- *I believe my business will be financially better off in 12 months.*
- *My business currently has sustainable operating margins.*

Agreement with these statements is summarised in Table 6 below, by descending order of agreement[2]. The key findings are as follows:

- Less than half of all the respondents ranking this issue in their Top 3 agreed with each statement. Compared to the level of agreement with statements relating to the other issues, agreement with these statements is relatively low.
- At 47% agreement was highest for the statement, *I believe the government is on the right economic track.* However, significant percentages of respondents either disagreed with this statement or provided a neutral response (i.e., neither agreed nor disagreed). Combined, this is 52%.
- The significantly lower levels of agreement for the other two statements points to the fact that many respondents felt their business would not be financially better off in the next 12 months (34% agreement) or that it currently had sustainable operating margins (27% agreement).

Table 6: [High] business costs and economic pressures

… please tell us how much you agree or disagree with each of the statements about this topic?

Base = 120	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
I believe the government is on the right economic track	100	47	27	25	2
I believe my business will be financially better off in 12 months	100	34	39	19	8
My business currently has sustainable operating margins	100	27	34	36	3

Note: Total may not add to 100 percent due to rounding.

[2] Respondents' agreement/disagreement was measured on a 5-point Likert scale, where 1='strongly disagreed' and 5='strongly agreed', but for the purposes of presenting the results in the table we have grouped respondents who gave a rating of 1 or 2 as respondents who disagreed and respondents who gave a rating of 4 or 5 as respondents who agreed. Respondents could also 'neither agree nor disagree' or state they 'did not know'.

4.2 Issue #2: The [poor] state of the roading network

At 61%, this issue was ranked almost as frequently by industry respondents in their Top 3 issues as the [high] *business costs and economic pressures*. The statements were:

- *The poor maintenance of the roading network is endangering truck drivers and other road users*.
- *Regional roads, including bridges, tend to get ignored*.
- *The delay in replacing the Cook Strait ferries is a major risk for our industry and economy*.

Agreement with these statements is summarised in Table 7 below, by descending order of agreement[3]. The key findings are as follows:

- The large majority of industry respondents who ranked this issue in their Top 3 agreed with the three statements, with almost 100% agreeing that *the poor maintenance of the roading network is endangering truck drivers and other road users* (93%).
- Similarly, there was widespread agreement that *regional roads, including bridges tend to be ignored* (84%), and the *delay in replacing the Cook Strait ferries is a major risk* (79%).

Table 7: The [poor] state of the roading network

… please tell us how much you agree or disagree with each of the statements about this topic?

Base =119	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
The poor maintenance of the roading network is endangering truck drivers and other road users	100	93	5	2	0
Regional roads, including bridges, tend to get ignored	100	84	13	3	1
The delay in replacing the Cook Strait ferries is a major risk for our industry and economy	100	79	13	6	3

Note: Total may not add to 100 percent due to rounding.

[3] Respondents' agreement/disagreement was measured on a 5-point Likert scale, where 1='strongly disagreed' and 5='strongly agreed', but for the purposes of presenting the results in the table we have grouped respondents who gave a rating of 1 or 2 as respondents who disagreed and respondents who gave a rating of 4 or 5 as respondents who agreed. Respondents could also 'neither agree nor disagree' or state they 'did not know'.

4.3 Issue #3: The health, safety and wellbeing of drivers

At 42%, the issue that was ranked next most frequently in industry respondents' Top 3 was, the *health, safety and wellbeing of drivers*. The statements relating to this issue were:

- *We need more purpose-designed rest stops for truck drivers.*
- *It is challenging to achieve a good work-life-balance while working as a truck driver.*
- *Driving hours are about right with sufficient rest breaks.*

Agreement with these statements is summarised in Table 8 below, by descending order of agreement[4]. The key findings are as follows:

- There was general agreement amongst industry respondents who ranked this issue in their Top 3 that there should be purpose-designed rest stops for truck drivers (78%) and that it was challenging to achieve a good work-life balance as a truck driver (72%).
- In comparison, there was less agreement that driving hours were about right, although over one-half still agreed with this statement (55%).

Table 8: The health, safety and wellbeing of drivers

… please tell us how much you agree or disagree with each of the statements about this topic?

Base = 82	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
We need more purpose-designed rest stops for truck drivers	100	78	16	4	1
It is challenging to achieve a good work-life-balance while working as a truck driver	100	72	20	7	1
Driving hours are about right with sufficient rest breaks	100	55	21	24	0

Note: Total may not add to 100 percent due to rounding.

[4] Respondents' agreement/disagreement was measured on a 5-point Likert scale, where 1='strongly disagreed' and 5='strongly agreed', but for the purposes of presenting the results in the table we have grouped respondents who gave a rating of 1 or 2 as respondents who disagreed and respondents who gave a rating of 4 or 5 as respondents who agreed. Respondents could also 'neither agree nor disagree' or state they 'did not know'.

4.4 Issue #4: Regulatory requirements and compliance

At 34%, the issue that was ranked next most frequently in industry respondents' Top 3 was, *regulatory requirements and compliance*. The statements relating to this issue were:

- *Regulations have become far too complex and should be simplified.*
- *Regulatory requirements and compliance obligations are a challenge to the economic viability of my business.*
- *I believe Police/CVST are doing a good job of policing our industry.*
- *I believe NZTA is doing a good job regulating our industry.*

Agreement with these statements is summarised in Table 9 below, by descending order of agreement[5]. The key findings are as follows:

- Almost all industry respondents who ranked this issue in their Top 3 agreed that *regulations have become far too complex and should be simplified* (93%).
- Reflecting this, the majority of industry respondents agreed that regulations and compliance obligations challenged the economic viability of their business (77%).
- In comparison, opinions were polarised in terms of whether Police/CVST are doing a good job (31% agreed, but 32% disagreed), whereas over one-half disagreed that this was the case with NZTA (16% agreed cf. 55% disagreed).

Table 9: Regulatory compliance and regulations

… please tell us how much you agree or disagree with each of the statements about this topic?

Base = 65	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
Regulations have become far too complex and should be simplified	100	93	5	3	0
Regulatory requirements and compliance obligations are a challenge to the economic viability of my business	100	77	12	9	2
I believe Police/CVST are doing a good job of policing our industry	100	31	37	32	0
I believe NZTA is doing a good job regulating our industry	100	16	29	55	0

Note: Total may not add to 100 percent due to rounding.

[5] Respondents' agreement/disagreement was measured on a 5-point Likert scale, where 1='strongly disagreed' and 5='strongly agreed', but for the purposes of presenting the results in the table we have grouped respondents who gave a rating of 1 or 2 as respondents who disagreed and respondents who gave a rating of 4 or 5 as respondents who agreed. Respondents could also 'neither agree nor disagree' or state they 'did not know'.

4.5 Issue #5: Road safety

At 31%, the issue that was ranked next most frequently in industry respondents' Top 3 was *road safety*. The statements relating to this issue were:

- *Driver education should be improved to encourage better driving by the public.*
- *Police are adequately policing RIDS behaviours (restraints, impairment, distraction, speed).*
- *Current road safety campaigns are effective.*

Agreement with these statements is summarised in Table 10 below, by descending order of agreement[6]. The key findings are as follows:

- The large majority of industry respondents ranking this issue in their Top 3 agreed that there needed to be more driver education to improve the public's driving behaviour (85%).
- Perhaps as part of this, most industry respondents disagreed that current road safety campaigns were effective (64% disagreement cf. 8% agreement) and more than half disagreed that the Police were adequately policing RIDS behaviour (55% disagreement cf. 23% agreement).

Table 10: Road safety

… please tell us how much you agree or disagree with each of the statements about this topic?

Base = 60	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
Driver education should be improved to encourage better driving by the public	100	85	7	6	2
Police are adequately policing RIDS behaviours (restraints, impairment, distraction, speed)	100	23	22	55	0
Current road safety campaigns are effective	100	8	27	64	2

Note: Total may not add to 100 percent due to rounding.

[6] Respondents' agreement/disagreement was measured on a 5-point Likert scale, where 1='strongly disagreed' and 5='strongly agreed', but for the purposes of presenting the results in the table we have grouped respondents who gave a rating of 1 or 2 as respondents who disagreed and respondents who gave a rating of 4 or 5 as respondents who agreed. Respondents could also 'neither agree nor disagree' or state they 'did not know'.

4.6 Issue #6: Funding transport infrastructure and improvements development

At 29%, the issue that was ranked next most frequently in industry respondents' Top 3 was *funding transport infrastructure and improvements development*. The statements relating to this issue were:

- *Road freight should be exempt from congestion charging.*
- *I agree with increased use of tolling to fund the Roads of National Significance.*
- *Fuel excise duty should be replaced by universal road user charges for all vehicle types.*
- *The government should borrow more to fund infrastructure.*
- *I support the concept of congestion charging to reduce delays at peak times.*

Agreement with these statements is summarised in Table 11 below, by descending order of agreement[7]. The key findings are as follows:

- Most industry respondents ranking this issue in their Top 3 agreed with all the statements, except for the last. That is, 43% agreed that there should be congestion charging at peak times while 32% disagreed.
- Well over half agreed with all other statements, including that road freight should be exempt from congestion charging (79% agreement), tolling should be increased to fund the Roads of National Significance (63%), fuel excise duty should be replaced by universal RUC (63%) and the government should borrow more to fund infrastructure (61%).

Table 11: Funding transport infrastructure and improvements development

… please tell us how much you agree or disagree with each of the statements about this topic?

Base = 57	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
Road freight should be exempt from congestion charging	100	79	16	6	0
I agree with increased use of tolling to fund the Roads of National Significance	100	63	23	12	2
Fuel excise duty should be replaced by universal road user charges for all vehicle types	100	63	19	14	4
The government should borrow more to fund infrastructure	100	61	21	15	4
I support the concept of congestion charging to reduce delays at peak times	100	43	23	32	4

Note: Total may not add to 100 percent due to rounding.

[7] Respondents' agreement/disagreement was measured on a 5-point Likert scale, where 1='strongly disagreed' and 5='strongly agreed', but for the purposes of presenting the results in the table we have grouped respondents who gave a rating of 1 or 2 as respondents who disagreed and respondents who gave a rating of 4 or 5 as respondents who agreed. Respondents could also 'neither agree nor disagree' or state they 'did not know'.

4.7 Issue #7: Workforce challenges

At 27%, the issue that was ranked next most frequently in industry respondents' Top 3 was, *workforce challenges*. The statements relating to this issue were:

- *Our industry needs to attract more young people.*
- *Diversity is a good thing for our industry.*
- *The current heavy vehicle driver licensing system makes it too difficult for new entrants to join the road freight industry.*

Agreement with these statements is summarised in Table 12 below, by descending order of agreement[8]. The key findings are as follows:

- Almost all industry respondents ranking this issue in their Top 3 agreed that the industry needed to attract more young people (94%) and almost two-thirds agreed that *diversity is a good thing for our industry* (60%).
- There was also general agreement that, the *current heavy vehicle driver licensing system makes it too difficult for new entrants to join the road freight industry* (50% agreement), although 21% disagreed that this is the case.

Table 12: Workforce challenges

… please tell us how much you agree or disagree with each of the statements about this topic?

Base = 52	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
Our industry needs to attract more young people	100	94	0	6	0
Diversity is a good thing for our industry	100	60	27	14	0
The current heavy vehicle driver licensing system makes it too difficult for new entrants to join the road freight industry	100	50	23	21	6

Note: Total may not add to 100 percent due to rounding.

[8] Respondents' agreement/disagreement was measured on a 5-point Likert scale, where 1='strongly disagreed' and 5='strongly agreed', but for the purposes of presenting the results in the table we have grouped respondents who gave a rating of 1 or 2 as respondents who disagreed and respondents who gave a rating of 4 or 5 as respondents who agreed. Respondents could also 'neither agree nor disagree' or state they 'did not know'.

4.8 Issue #8: [Poor] public perception and industry reputation

At 9%, the issue that was ranked next most frequently in industry respondents' Top 3 was, [poor] *public perception and industry reputation*. The statements relating to this issue were:

- *Our truck drivers regularly experience abuse from members of the public while working.*
- *Public opinion of the road freight industry has improved in recent years.*
- *Overall, the public appreciates the importance of the work we do.*

Agreement with these statements is summarised in Table 13 below, by descending order of agreement[9]. Caution should be exercised when interpreting these results given the small sub-sample size. With this in mind, the key findings are as follows:

- Just over two-thirds of industry respondents ranking this issue in their Top 3 disagreed that *public opinion of the road freight industry has improved in recent years* and that *the public appreciates the importance of the work the industry does* (both 67% disagreement).
- Reflecting this, one-half agreed that *truck drivers regularly experience abuse from the public while working* (50%).

Table 13: [Poor] public perception and industry reputation

… please tell us how much you agree or disagree with each of the statements about this topic?

Base = 18*	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
Our truck drivers regularly experience abuse from members of the public while working	100	50	39	11	0
Public opinion of the road freight industry has improved in recent years	100	17	17	67	0
Overall, the public appreciates the importance of the work we do	100	17	17	67	0

Note: Total may not add to 100 percent due to rounding.
* Caution: Low base number of respondents – results are indicative only.

[9] Respondents' agreement/disagreement was measured on a 5-point Likert scale, where 1='strongly disagreed' and 5='strongly agreed', but for the purposes of presenting the results in the table we have grouped respondents who gave a rating of 1 or 2 as respondents who disagreed and respondents who gave a rating of 4 or 5 as respondents who agreed. Respondents could also 'neither agree nor disagree' or state they 'did not know'.

4.9 Issue #9: Sustainability and decarbonisation

At 5%, the issue that was ranked next most frequently in industry respondents' Top 3 was, *sustainability and decarbonisation*. The statements relating to this issue were:

- *Customers are increasingly asking how our business is managing our carbon emissions.*
- *My business would like to shift to lower or zero tail-pipe emission vehicles (hydrogen, dual fuel, or EV) within the next five years if possible.*
- *Our industry should play a leading role in mitigating emissions and climate change.*
- *I know what the government's current transport emissions reductions targets are.*

Agreement with these statements is summarised in Table 14 below, by descending order of agreement[10]. As for the previous issue, caution should be exercised when interpreting these results given the small sub-sample size. The key findings are as follows:

- Generally, it appears that opinions were polarised. For example, 44% agreed that *customers are increasingly asking how our business is managing our carbon emissions,* while 44% disagreed with this statement.
- In contrast, over half disagreed that they knew the government's current transport emissions reduction targets (55%).

Table 14: Sustainability and decarbonisation

… please tell us how much you agree or disagree with each of the statements about this topic?

Base = 9*	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
Customers are increasingly asking how our business is managing our carbon emissions	100	44	11	44	0
My business would like to shift to lower or zero tail-pipe emission vehicles (hydrogen, dual fuel, or EV) within the next five years if possible	100	33	11	55	0
Our industry should play a leading role in mitigating emissions and climate change	100	22	44	33	0
I know what the government's current transport emissions reductions targets are	100	11	33	55	0

Note: Total may not add to 100 percent due to rounding.
* Caution: Low base number of respondents – results are indicative only.

[10] Respondents' agreement/disagreement was measured on a 5-point Likert scale, where 1='strongly disagreed' and 5='strongly agreed', but for the purposes of presenting the results in the table we have grouped respondents who gave a rating of 1 or 2 as respondents who disagreed and respondents who gave a rating of 4 or 5 as respondents who agreed. Respondents could also 'neither agree nor disagree' or state they 'did not know'.

5.0 Opinions about the most positive outcome for the Top 3 issues

In addition to agreeing or disagreeing with various statements about each of their Top 3 issues, industry respondents were asked to focus on the issue they ranked first and explain what they believed would be the **most positive outcome** going forward and the **best way** for the industry to achieve that outcome.

These were open-ended questions, meaning that the free text answers given by respondents were subsequently analysed so that the key themes could be identified.

A separate sub-section follows for each of the three highest ranking issues, beginning with the issue that was ranked the most frequently by respondents as being of importance and/or concern (viz., [high] *business costs and economic pressures*).

5.1 Most positive outcome for Issue #1: [High] business costs and economic pressures

In the case of this issue, ranked by 62% of industry respondents as one of their Top 3 issues, the outcome most frequently identified as being 'the most positive' was, *fairer and more sustainable pricing* (53%) (Table 15 overleaf). The following are examples of how this sentiment was often expressed:

> *A better economy. An environment in which rates are fair; meaning that business is able to function without the stress.*

> *Our industry being more united, backing each other up. Understanding our costs so that we ensure we are making a margin, too many are undercutting and driving margins down, resulting in operators taking short cuts, paying drivers less and our industry being at the bottom of the food chain.*

> *A sustainable and resilient road freight industry, where businesses can operate profitably despite economic pressures. This means maintaining fair and stable pricing for customers while ensuring operators can cover rising costs, invest in their fleets, and pay competitive wages to retain skilled drivers. A balanced cost structure would lead to long-term industry viability, reducing the risk of service disruptions and ensuring reliable freight movement across New Zealand.*

Table 15: [High] business costs and economic pressures – Most positive outcome

Thinking about this [most important] issue, what, in your opinion would be the most positive outcome?

Base =	Total 68* %
Fair and more sustainable pricing	53
(Better) compliance and enforcement	41
Lower operating costs	38
Other/Don't know	4

Note: Total may exceed 100 percent because of multiple response.
* Based on the sub-sample of respondents who ranked this issue in their Top 3.

Two other outcomes were mentioned in relation to this theme; (better) *compliance and enforcement* (41%) and *lower operating costs* (38%). The following are examples of how respondents expressed the outcome of (better) *compliance and enforcement*:

> *More work to level the playing field. Compliant organisations are more expensive to run than non-compliant ones. This means non-compliant organisations have a competitive advantage.*
>
> *Ensuring ALL operators are compliant and getting processes which identify the non-compliant operators to level the playing field.*
>
> *Reduce compliance costs.*

The following are examples of how the outcome of *lower operating costs* was expressed:

> *Ability to charge better rates, by lowering fuel costs, lowering road user charges.*
>
> *Rising road user charges and diesel costs are a huge factor in running our business efficiently. Passing that onto our customers is becoming increasingly difficult and at times embarrassing. How much we pay and the state of the roads we are dealing with doesn't add up.*
>
> *Reduce RUC, reduce fuel tax!*

5.1.1 Best way to achieve a positive outcome for Issue #1: [High] business costs and economic pressures

Table 16 shows that industry respondents most frequently suggested the best way to achieve the positive outcomes for this issue was for there to be *industry-wide fair pricing and less undercutting* (25%). The following are examples of how this suggestion was often expressed:

> *Businesses need to stop low balling the playing field. Businesses which are taking a risk and doing things for less than cost cause issues for businesses that are trying to stay competitive. Stay within market ranges and everyone will be able to gain a margin, it will then be up to the customer which company they want to go with.*
>
> *Collaboration across the industry, government, and stakeholders to address key cost drivers. This includes: Advocating for fairer fuel pricing, road user charges, and regulatory compliance costs. Leveraging technology to improve efficiency, such as route optimization, fuel management, and automation. Encouraging investment in alternative fuel vehicles and infrastructure to reduce long-term operating costs. Supporting industry-wide discussions on fair pricing models that reflect the true cost of transport services. By working together, the industry can create a more stable and predictable cost environment, ensuring businesses can continue delivering efficiently and sustainably.*
>
> *Transport companies should be working together (within reason) for pricing as the undercutting is killing businesses.*

Table 16: [High] business costs and economic pressures – Best way to achieve the outcome

And how would the industry best get there [i.e., the most positive outcome]?

Base =	Total 68* %
Industry-wide fair pricing and less undercutting	25
(Better/more) infrastructure investment and roading improvements	22
Lower operating costs	18
Other (including don't know)	40

Note: Total may exceed 100 percent because of multiple response.
* Based on the sub-sample of respondents who ranked this issue in their Top 3.

Two other major ways of achieving a positive outcome in relation to this issue were mentioned; namely, (better/more) *infrastructure investment and roading improvements* (22%) and *lower operating costs* (18%).

The following are examples of how respondents expressed the suggestion of (better) *infrastructure investment and roading improvements*:

> *Bipartisan infrastructure pipeline and road maintenance programs that do not flip flop every time govt changes.*
>
> *Fix the roads. Fix the bridges. Use all the tax that's collected from our fuel and RUC to fix the roads.*

The following are examples of how the suggestion of *lower operating costs* was expressed:

> *Reduce pricing volatility for things like fuel, sustainable RUC rates, invest in regional infrastructure to improve efficiency.*
>
> *Less fuel tax, make fuel within country, open Marsden Point, reimburse RUC for major detours, providing the companies can prove cost of detour.*

5.2 Most positive outcome for Issue #2: The [poor] state of the roading network

The most positive outcome that was identified by industry respondents ranking this issue in their Top 3 (61%) was *higher quality road construction and maintenance* (65%) (Table 17). Following are examples of how this sentiment was often expressed:

> *Road rebuilding to suit the current amount of heavy traffic and hpmv weights.*
>
> *Road surfacing needs to be world leading, providing the best in terms of safety and longevity, even if cost/km is initially more. Although I initially agreed with the cancellation of the big ferries, I have done a u-turn. We should have stuck with them, swallowed the extra costs and had Interislander put on two large rail enabled ferries.*
>
> *Stop taking the cheapest price for roading contracts. Should be on value of work done and quality of work done. Make the roading contractors and the people giving the contracts out take more responsibility for the outcome. That is, when the job fails within the first year or less, make them fix it for free and straight away. And some sort of performance pay for the NZTA people giving out these contracts. If the work keeps failing, start docking their pay for not doing their due diligence properly. It's not all about money.*

Table 17: The [poor] state of the roading network – Most positive outcome

Thinking about this [most important] issue, what, in your opinion would be the most positive outcome?

Base =	Total 49* %
Higher quality road construction and maintenance	65
Expansion and modernisation of infrastructure	20
Smarter and more efficient roadworks management	16
Other/Don't know	4

Note: Total may exceed 100 percent because of multiple response.
* Based on the sub-sample of respondents who ranked this issue in their Top 3.
.

Two other outcomes were mentioned in relation to this theme; *expansion and modernisation of infrastructure* (20%) and *smarter and more efficient roadworks management* (16%). The following are examples of how respondents expressed *expanding and modernising the infrastructure*:

> *More passing lanes, clear congestion in towns and cities, improve road surfaces.*
>
> *A free flowing and safe roading network that includes reliable passage across the Cook Strait.*
>
> *Massive investment required. We need a 3 lane motorway in each direction crossing the length of New Zealand with suitable links to all of the nation's ports. These freight corridors should be protected at all cost by Crown imposed covenants into perpetuity.*

The following are examples of how *smarter and more efficient roadworks management* was expressed:

> *Less road closures for road works would be great.*
>
> *Coordinate road closures.*
>
> *As little full closures on SH1 as possible.*

5.2.1 Best way to achieve a positive outcome for Issue #2: The [poor] state of the roading network

Table 18 shows that industry respondents most frequently suggested the best way to achieve the positive outcomes for this issue was to have (greater) *accountability and quality in road construction* (39%). Following are examples of how this suggestion was often expressed:

> *Reintroduce a government department that is in charge of maintaining and developing our roading network (e.g., the Ministry of Works).*
>
> *Make all these major roading contracts work 24/7 and hold the contractor responsible for the quality of their workmanship.*
>
> *Use correct products and make a good substructure for the roads.*

Table 18: The [poor] state of the roading network – Best way to achieve the outcome

And how would the industry best get there [i.e., the most positive outcome]?

Base =	Total 49* %
(Greater) accountability and quality in road construction	39
Smarter, more efficient project management	35
Dedicated and transparent funding	33
Other/Don't know	16

Note: Total may exceed 100 percent because of multiple response.
* Based on the sub-sample of respondents who ranked this issue in their Top 3.
.

Two other major ways of achieving a positive outcome were mentioned; *smarter, more efficient project management* (35%) and *dedicated and transparent funding* (33%).

The following are examples of how respondents expressed the suggestion of *smarter, more efficient project management*:

> *Review all government operations and the way they manage the roading contractors in this country. Remove the whole of KiwiRail senior management and get some fresh people in to manage the unions and the customers*
>
> *Perhaps do more road works in the night, when there's less traffic and more efficient roading crews. Too many people standing around watching compared to the ones there actually getting the job done.*
>
> *Better management of costs, few less cones for a start, reduce time to get things done. Do it right first time and not so much of the patchwork quilt mentality.*

The following are examples of how the suggestion of *dedicated and transparent funding* was expressed:

> *Every vehicle on roads should be paying RUC do away with fuel taxes.*
>
> *Borrowing, but ring fenced for roading only.*
>
> *Bring in the Chinese or the Italians to build the roads and toll everything, so it becomes a user pays scenario. No ridiculous toll fees, $2 for cars, motorbike and bicycles and $5 for trucks. A national charge per toll section, all the same. All toll collections to make their way into an investment fund for roading maintenance and development.*

5.3 Most positive outcome for Issue #3: Health, safety and well-being of drivers

Two outcomes were identified to the same extent as the most positive outcome for this issue; namely, *better work-life balance and fatigue management* (41%) and *safer working conditions and employer accountability* (41%) (Table 19 overleaf).

The following are examples of how *better work-life balance and fatigue management* was often expressed:

> *Employers need to be more aware of issues like driver fatigue and stress which are frequently not obvious, but occur frequently. 10 hour breaks are not sufficient if drivers are working 7 days a week. Drivers need a two day break somewhere in the week to ensure they have time to wind down properly. If they witness or are involved in accidents, counseling should be compulsory regardless of whether they think they need it or not.*

> *I think fatigue is a massive issue. I believe if work/rest hours applied more to the job, rather than companies having to work around (read: lie in a logbook), our drivers would be better off.*

> *The research is in about fatigue and the Circadian Rhythm. Stop the 7 day 7 night roster, driving between 2 am and 6 continually.*

The following are examples of how *safer working conditions and employer accountability* was often expressed:

> *The health and wellbeing of our truck drivers is critical to getting them home safely and alive and reducing risk to members of the public.*

> *Tougher penalties for companies who push and consistently break the rules, along with educating drivers and owners of the benefits of wellbeing. Happy/well staff are productive and good on the equipment.*

> *A safer, healthier, and more sustainable working environment for truck drivers, leading to improved well-being, reduced accidents, and better retention in the industry.*

Table 19: Health, safety and wellbeing of drivers – Most positive outcome

Thinking about this [most important] issue, what, in your opinion would be the most positive outcome?

Base =	Total 32* %
Better work-life balance and fatigue management	41
Safer working conditions and employer accountability	41
Improved facilities, food and rest areas	22
Other/Don't know	12

Note: Total may exceed 100 percent because of multiple response.
* Based on the sub-sample of respondents who ranked this issue in their Top 3.
.

5.3.1 Best way to achieve a positive outcome for Issue #3: Health, safety and wellbeing of drivers

Table 20 shows that industry respondents most frequently suggested the best way to achieve the positive outcomes for this issue was *fairer pay, working conditions and (better) industry culture* (50%). The following are examples of how this suggestion was often expressed:

> *Getting somebody at MPI or the government to listen. Maybe there could be a minimum standard or some chain of responsibility contract that has to be adhered to.*
>
> *Better advocacy for drivers doing the hard work as I feel there is none for the normal driver.*
>
> *People b4 profit. And then it will be cost saving, ACC, driver retention. You can only drive one truck @ a time, no matter how good you think you are!*

Table 20: Health, safety and wellbeing of drivers – Best way to achieve the outcome

And how would the industry best get there [i.e., the most positive outcome]?

Base =	Total 32* %
Fairer pay, working conditions and (better) industry culture	50
Fatigue management and reasonable working hours	25
Health, wellbeing and support facilities	19
Other/Don't know	38

Note: Total may exceed 100 percent because of multiple response.
* Based on the sub-sample of respondents who ranked this issue in their Top 3.

Two other major ways of achieving a positive outcome were mentioned; *fatigue management and reasonable working hours* (25%) and *health, wellbeing and support facilities* (19%).

The following are examples of how respondents expressed the suggestion of *fatigue management and reasonable working hours*:

> *Stop thinking that "it always has been like this". No other professional nowadays has 14h days. Many people interested in driving are discouraged when listening to 70hrs a week job …*
>
> *I think our drivers need 2 rest days after 70hrs. When we get busy at work, I see our drivers getting absolutely hammered. I talk to them and I talk to management, but it's not enough. If they need a truck on the road, that guy will go if he has hours. Look at it this way, can you work 70hrs a week, 1 day off, then back into another 70hr week? Month after month. It's not good for anyone's physical or mental health. These boys and girls need stringent help from the top, so management can't rung them out.*
>
> *The industry needs to be mindful that the people are their best asset. Take time to put as much effort into the maintenance of staff as the time spent on the equipment.*

The following are examples of how respondents expressed the suggestion of *health, wellbeing and support facilities*:

The industry needs to understand that there are so many unhealthy drivers out there. A lot won't even know it yet. Diabetes is one that is quickly taking hold. The industry needs to get behind a campaign to promote healthy eating and drinking. We promote and celebrate if we have a new truck that is Euro 6 compliant, but we don't seem to care about the state of the driver that we put behind the wheel.

Big fuel companies should be lent on to supply facilities, it's available to truck drivers in Australia, so why not here? CVST safety centres? If they are safety centres, can we pull in and use facilities to refresh so we can get a good rest and do our jobs safely, or are they revenue gathering centres?

Build purpose built truck stops with toilets, showers and food options around the country.

6.0 Workforce challenges

Transporting New Zealand decided to seek feedback about several important workforce matters through the survey, including those relating to the demand for and supply of drivers in general; overseas-trained drivers; drivers exiting the industry; driver skills and training in general; and flexible working arrangements for drivers. This section of the report presents the results to these subject topics.

6.1 Demand for and supply of road freight drivers

Industry respondents were asked whether they had **employed or wanted to employ** any road freight drivers in the last two years and if they had, whether they were successful in doing so, by either employing drivers from other firms or drivers new to the industry. Table 21 shows the results to this question, with the key findings being:

- Overall, 80% of industry respondents stated that, in the last two years, they had employed drivers; either those who had worked for other road freight firms (73%) or drivers new to the industry (45%).
- Notably, 22% said they had experienced difficulties finding suitable drivers to fill workforce gaps.
- There are no significant differences between the results for the total sample of respondents and those who are Transporting New Zealand members.

Table 21: Employing road freight drivers

*Which of the following have applied to your business in the **last 2 years**?*

Base =	Total 194 %	TNZ member 116 %
We have employed road freight drivers, new to the industry	45	48
We have employed road freight drivers who previously worked for other road freight firms	73	80
We have tried to employ road freight drivers, but have experienced difficulties finding any who are suitable	22	22
We have not been employing new drivers in the last 2 years	20	16

Note: Total may exceed 100 percent because of multiple response.

6.2 Employing overseas road freight drivers

Industry respondents who had indicated that their business had employed or attempted to employ road freight drivers in the last two years were also asked whether they had employed or considered employing **overseas drivers**. Table 22 shows the results to this question, with the key findings being:

- One-third of industry respondents who had previously indicated employing drivers in the last two years stated they had employed overseas drivers (34%). This converts to 27% based on the total sample.
- Another 21% had considered doing so, but as yet had not employed any. This converts to 17% based on the total sample.
- There are no significant differences between the results for the total sample of respondents and those who are Transporting New Zealand members.

Table 22: Employing overseas road freight drivers

*Which of the following have applied to your business in the **last 2 years**?*

Base =	Total 155* %	TNZ member 98* %
Yes, we have employed overseas drivers in the last 2 years	34	31
Yes, we have considered employing overseas drivers (but have not employed any as yet)	21	21
No, we have not employed any overseas drivers/considered employing them	45	48
Total	100	100

Note: Total may not add to 100 percent due to rounding.
* Based on respondents whose business tried to employ/ employed drivers in the last 2 years.

6.3 Expectations about road freight drivers exiting the industry

All industry respondents were asked what percentage, if any, of their current road freight driving staff they expected to **leave the industry in the next 5 years**. Table 23 shows the results to this question, with the key findings being:

- Although 13% of industry respondents did not know if any of their drivers would retire or leave the industry in the next 5 years, most indicated that there would be some attrition. In fact, almost one-half indicated that 'up to 25%' or more would do so (47%).
- There are no significant differences between the results for the total sample of respondents and those who are Transporting New Zealand members. Almost one-half of Transporting New Zealand members (48%) expect that 'up to 25%' or more of their drivers will retire or leave the industry in the next 5 years.

Table 23: Drivers exiting the industry

*What percentage of your business's current road freight drivers do you expect will retire/leave the industry in the **next 5 years**?*

Base =	Total 194 %	TNZ member 116 %
No drivers will retire/leave the industry in the next 5 years	12	14
Up to 10%	28	28
Up to 25%	31	33
Up to 50%	12	11
Up to 75%	4	4
Up to 100%	0	0
Don't know	13	9
Total	100	100

Note: Total may not add to 100 percent due to rounding.

6.4 Driver skills and training found to be lacking

Industry respondents who had employed road freight drivers in the last 2 years (either existing drivers from other firms or drivers new to the industry) were asked if they had found them **lacking any skills and training** and if so, to indicate which specific ones. Table 24 shows the results to this question, with the key findings being:

- Nearly all industry respondents who had employed drivers in the last two years stated the drivers they had employed lacked some skill or training (91%).
- Most frequently, this related to their technical driving ability (67%) and/or their skill or training relating to vehicle maintenance, load securing and route planning (66%).
- There are no significant differences between the results for the total sample of respondents and those who are Transporting New Zealand members.

Table 24: Skills and training lacking in newly employed drivers

Which of the following driver skills or training, if any, have you found lacking in the drivers you have employed?

Base =	Total 150* %	TNZ member 97* %
Technical driving ability (e.g., backing, operating on hills or difficult terrain)	67	69
Vehicle maintenance, load securing, and route planning	66	64
Safe driving practices and road safety awareness	49	49
Communication, customer service and stress management	53	52
Other	17	25
Have not found any skills/training lacking	9	9

Note: Total may exceed 100 percent because of multiple response.

* Based on respondents who business has employed drivers in the last 2 years.

Industry respondents were invited to comment on ‘other’ skills and training that they felt were lacking and the 17% who did generally reiterated those that they had already commented on, as the following verbatim illustrate. Some respondents specifically referred to these issues with respect to **overseas drivers**:

> *When someone comes here, they find NZ conditions different from where they came from. Language is a problem, and they don't want to admit they don't know. That is a problem, and we keep giving them jobs based on what they say they have done. All overseas drivers should have to pass a test before driving in NZ.*
>
> *English as a second language and ability to process all the required information to achieve competency.*

Other comments related to **younger (inexperienced) drivers**:

> *Some of the younger staff need a bit more guidance which comes with experience and us putting in some time on the job with them, which we are happy to do.*
>
> *Variable. We employ new entrants as well, so don’t expect a lot. Many experienced drivers have limited technical knowledge, both mechanical areas as well as compliance - very low understanding of permits.*

Many comments were of a **technical nature**:

> *Knowledge of heavy vehicle law, i.e., axle weights etc. is very lacking in some drivers, and an ability to drive manual trucks and using the engine brake and retarders instead of foot braking.*
>
> *Can not operate a Roadranger gearbox, or any form of manual gearbox, no mechanical understanding at all.*
>
> *Understanding why you need air built up before moving off and dragging the trailer.*
>
> *No understanding of fatigue management.*
>
> *Lack of professional courtesy to all road users.*
>
> *Staff having the lack of understanding or the ability to solve their own problems. A lot of this is not being able to ride with adults as a child and learning life skills.*
>
> *A lot of drivers now seem to struggle with analytical thinking/problem solving/fixing or diagnosing the most basic maintenance issues. Loading trucks correctly, axle weight distribution, reading and understanding permits, understanding the implications of them getting it wrong, doing basic tasks like pre-start checks and reporting faults.*

6.5 Flexible working arrangements

All industry respondents were asked if they provided their road freight drivers with **flexible working arrangements** (e.g., flexible rostering). Table 25 shows the results to this question, with the key findings being:

- Although 19% of industry respondents stated they did not provide alternative work options, over one-half said they provided flexible rostering (55%) and one-third unpaid leave (35%). Consider these results in relation to those reported in Section 4.7 earlier on the issue of workforce challenges.
- There are no significant differences between the results for the total sample of respondents and those who are Transporting New Zealand members.

Table 25: Flexible working arrangements

Which of the following does your business currently provide in terms of flexible working arrangements for its drivers?

Base =	Total 194 %	TNZ member 116 %
Flexible rostering	55	59
Unpaid leave	35	39
Other	18	22
We do <u>not</u> provide alternative work options	19	21
Don’t know	12	8

Note: Total may exceed 100 percent because of multiple response.

Industry respondents were invited to comment on ‘other’ flexible working arrangements and the 18% who did generally reiterated those that they had already commented on, as the following verbatim illustrate:

> *We will always be flexible with our drivers rostering and leave when there is a need, and the driver discusses the situation with us.*
>
> *We try to meet the needs of the drivers where we can, matching their skill to suitable work; some flexibility to assist to meet family requirements.*
>
> *We probably don't tick any of the boxes as such, but if someone has an appointment or wants annual leave it is very rare that we can't make it happen.*
>
> *We operate 7 days, so are able to offer a roster that suits the individual driver based on their needs.*

We have differing options of shift patterns. We have improved rates for our '4 on 4 off' roles to a sustainable living wage to encourage work life balance, and have seen 70% of our workforce take it up

We only have drivers working Monday to Friday.

In our industry weekend work is frequent, but we try to ensure drivers get alternate weekends off.

Alternative shift planning, job sharing, 4-day weeks.

7.0 Public perceptions and industry reputation

Transporting New Zealand also decided to use the industry survey to seek feedback about **how the industry believes it is perceived by the general public**. Some of these questions were mirrored in the general public survey. This section of the report presents and compares the results for these two audiences.

7.1 Industry opinions about the general public's perceptions of professional road freight drivers

As noted earlier (see Sections 3 and 4), one of the nine (9) issues canvassed in the industry survey related to the **general public's perception** of the road freight industry. By way of context, this issue was ranked by only 9% of industry respondents in their Top 3 and as such, was of lower importance and/or concern compared with the other issues.

That said, Table 26 (which repeats a table in Section 4.8) shows the results to a question which asked industry respondents to comment on how they thought the general public viewed their industry. The findings are based on a small sub-sample of respondents and, therefore, should be treated as indicative:

- Fifty percent agreed that their *drivers regularly experience abuse from members of the general public while working* and reflecting this, two-thirds disagreed that *public opinion of the road freight industry has improved in recent years* (67%).
- The same percentage disagreed that, *the general public appreciates the importance of the work they do* (67%).
- The results for Transporting New Zealand members are not reported here as they are based on a small sub-sample of respondents (n=9).

Table 26: Public perception and industry reputation – All respondents

… please tell us how much you agree or disagree with each of the statements about this topic?

Base = 18*	Total %	Agree %	Neither agree nor disagree %	Disagree %	Don't know %
Our truck drivers regularly experience abuse from members of the public while working	100	50	39	11	0
Public opinion of the road freight industry has improved in recent years	100	17	17	67	0
Overall, the public appreciates the importance of the work we do	100	17	17	67	0

Note: Total may not add to 100 percent due to rounding.
* Caution: Low base number of respondents – results are indicative only.

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7.2 Opinions about how professional road freight drivers are viewed in general

Against this background, industry respondents were asked to rate the extent they believed the general public perceived professional road freight drivers **positively or negatively**.

The results to this question are compared in Table 27 overleaf with the results to a similar question asked in the general public survey. In both cases, a 5-point Likert scale was used, with 1='very negative' and 5='very positive'. The key findings are as follows:

- Reflecting the results in the previous section, almost one-half of industry respondents stated they thought the general public viewed professional road freight drivers negatively (49%). In comparison, 20% said they viewed them positively.
- There are no statistically significant differences between Transporting New Zealand members and non-members. Forty-seven percent of Transporting New Zealand members said they thought the general public viewed professional road freight drivers negatively vis-à-vis 26% who thought they viewed them positively.
- However, in contrast, the general public itself had a completely different point of view, stating it regarded the industry positively. In fact, 52% of general public respondents said they viewed professional road freight drivers positively, with only 7% viewing them negatively.
- The average result across all general public respondents who provided a valid response (i.e., excluding the 'don't knows') is 3.6, while the average result for industry respondents is 2.7 (and for Transporting New Zealand members 3.2). The main reason for these averages being around the mid-point of the 5-point Likert scale is that, in both cases, a significant proportion of respondents provided a neutral response (i.e., neither positive nor negative).

Table 27: Perception of professional road freight drivers

Industry survey: How would you rate the general public's perception of professional road freight drivers?

General Public survey: Would you say your perception of professional road freight drivers is … ?

Base =	Total Industry 194 %	TNZ member 116 %	Total General Public 1005 %
Very negative	7	8	1
Negative	42	39	6
Neither negative or positive	30	27	35
Positive	17	22	41
Very positive	3	4	11
Don't know	1	1	5
Total	100	100	100
Average (based on those providing a valid response)	2.7	3.2	3.6

Note: Total may not add to 100 percent due to rounding.

7.2.1 Opinions about how professional road freight drivers are viewed in general

The extent to which general public respondents had positive or negative perceptions of professional road freight drivers has been examined by several demographic variables. This shows the following.

- General public respondents who bike or ride motor cycles were more likely to have positive perceptions than respondents who use public transport (61% compared with 49%). There are no other statistically significant differences by the modes of transport used by respondents (Table 28 overleaf).
- Males were more likely to have positive perceptions than females (60% compared with 46%).
- Older respondents, 55+ were more likely to have positive perceptions than younger respondents 18-34 (60% compared with 45%).
- Generally, general public respondents living in the South Island were more likely to have positive perceptions than those living in the North Island. For example, 60% of respondents living in Canterbury compared with 48% of those living in Auckland.

Table 28: General public's perception of professional road freight drivers

General Public survey: Would you say your perception of professional road freight drivers is … ?

Base =	Total General Public 1005 %	Private car 860 %	Public transport 188 %	Bicycle, motor-bike 139 %	Walking 351 %	Other 95 %
Very negative	1	1	0	1	0	1
Negative	6	7	5	10	7	6
Neither negative or positive	35	34	39	26	35	32
Positive	41	43	39	42	40	34
Very positive	11	12	10	19	12	20
Don't know	5	4	7	2	7	7
Total	100	100	100	100	100	100
Average (based on those providing a valid response)	3.6	3.6	2.8	3.7	3.6	3.7

Note: Total may not add to 100 percent due to rounding.

7.2.2 General public's reasons for positive or negative perceptions of professional road freight drivers

Industry respondents were asked to provide an explanation as to **why they believed the general public had a negative or positive perception** of road freight drivers. The free-text answers to this open-ended question have been analysed and the key themes are reported in Table 29 overleaf, for all respondents, as well as sub-groups based on those who rated the general public as having positive perceptions of the industry, those having a negative perceptions and those having neutral perceptions (i.e., neither positive nor negative). Note that more than one theme could have been expressed in a respondent's answer.

The key findings are as follows:

- Most explanations were based on negative themes, reflecting the fact that over twice as many industry respondents stated they thought the general public viewed professional road freight drivers negatively (49% negative cf. 20% positive). This was even the case amongst those who thought the general public viewed the industry positively.
- Overall, industry respondents said the general public had a *poor understanding* [of professional road freight drivers]. For example, 57% of those who believed the general public viewed professional road freight drivers negatively stated this, as well as saying that the general public often *abused drivers on the road* (26%) and based their perceptions on *generalisations relating to one incident* (15%). The following are examples of the way this theme was expressed:

  A single negative experience with a truck and trailer unit can significantly influence a general public driver's perception of the road freight industry. Many small vehicle drivers may not have a comprehensive understanding of the industry and may view truck and trailer units as a nuisance on the road.

  Can't pass, scared of the size, block roads, get the heebie jeebies at the end of passing lane and cause danger when they try to beat the truck and then blame the truck.

  Discussions with the general public, misconceptions around heavy vehicle accidents and heavy vehicle accident data. I don't believe the general public understands.

- Industry respondents also commented on the media and the impact of social media. For example, 25% of those who believed the general public viewed professional road freight drivers negatively stated the *media's language contained inherent bias*, as well as singling out the *impact of social media on public perception* (17%). The following are examples of the way this theme was expressed:

  Due to media reports, trucks are the cause of all roading failures and accidents. I feel as we move more and more towards the use of migrant drivers, things are only going to get worse unless we really amp up our driving training and make sure all have understanding of the English language. We are still not seen as professionals or providing a service of value.

  Due to various reasons mainly put forward on social media, truck operators get blamed for any incident involving motor vehicle crashes. Any incidents involving heavy vehicles seem to get plenty of air time compared to other light vehicle incidents.

  Media reporting. Any accident involving a small delivery vehicle immediately gets labelled as a truck. Only the negative aspects are reported. Lack of knowledge of how a truck must manoeuvre and the work the driver does to protect other road users. Lack of knowledge of how to share the road safely.

Table 29: Reasons for the general public's perception of professional road freight drivers

Please provide a detailed explanation for the reason why you've rated the general public's perception of professional road freight drivers as [insert answer from previous question]?

Base =	Total Industry 180* %	Believe the public have negative perceptions 92 %	Believe the public have neither positive nor negative 51 %	Believe the public have positive perceptions 37 %
Positive or neutral themes:				
Generalisations based on one incident	17	15	24	11
Call for better public education	13	14	12	14
COVID's lingering influence fading	5	8	2	3
Negative themes:				
Poor understanding by the general public	57	57	65	49
'Cowboy' drivers tarnish the industry	21	24	18	19
Driver isolation and abuse on the road	19	26	12	11
Media language contains inherent bias	18	25	14	5
Impact of social media on public perception	14	17	12	8
Drivers feel unappreciated	12	5	18	22
Concerns about migrant drivers and skill standards	10	16	4	3
Disconnect between essential role and public respect	4	3	2	8
Other	4	0	8	11

Note: Total may exceed 100 percent because of multiple response.

A similar question was asked in the general public survey and the key themes based on the analysis of the free-text answers to that question are reported in Table 30. Note that more than one theme could have been expressed in a respondent's answer.

The key findings are as follows:

- Almost one in every two general public respondents (49%) who stated they had **positive** perceptions of professional road freight drivers said this was because of their *professionalism and skill*. This was expressed as follows:

  > *They drive the best because they do it daily with 45 tonnes plus.*
  >
  > *They are very courteous on the open highway, signaling when overtaken or being overtaken. They keep following distances. And a lot of them stop and help stranded motorists.*
  >
  > *They are respectful on the road. Perform a thankless, but very important job. They are better than almost all other road users.*

  In addition, 25% stated professional road freight drivers provided an *essential service and made a (significant) economic contribution*. This was expressed as follows:

  > *They cart materials and resources that we need and keep the economy running, as well as working anti social hours to fit in with the public.*
  >
  > *They are efficient, friendly and contribute to NZs economy and keeping things running. They are essential to the country.*
  >
  > *Road freight drivers perform a crucial task in the mobility of goods and services over night to all centres in New Zealand. This has a positive impact on the economy.*

  Others noted their *hard work and long hours of work* (21%) and their general *respect for the profession* (20%). These were expressed as follows:

  > *They perform a vital service for our economy and society and the work is difficult with long hours of driving, I respect anybody who does this profession.*
  >
  > *Without them goods wouldn't be widely available, I think they work some rough hours to get it done and for the most part they are safe on the road.*
  >
  > *They work hard, doing a tough job.*

- In contrast, those general public respondents who stated they had **negative** perceptions, most frequently said it was because they had *experienced their (negative) driving behaviour* (78%). This was expressed as follows:

  > *They tend to live in a world of their own and bully other road users on the road into giving way to them.*
  >
  > *They don't consider other drivers on the road and are very dangerous. My friend was recently side swiped by a truck and her car was an insurance write-off.*
  >
  > *Terrible drivers, too fast, pull out in front of cars because of size of their vehicles, don't slow down enough on unmanned roadworks.*

In addition, almost the same number stated they had negative perceptions because of *road safety concerns* (73%). This was expressed as follows:

> *They follow too close and because they are bigger, they think they own the road.*
>
> *I see far too many ignoring stop signs, blasting through traffic lights on orange/red, not giving way to other traffic at give way signs, apparently being ignorant of the correct signaling procedure at roundabouts and driving while using mobile phones, eating and/or drinking. They also appear unaware of the rules around use of fog lights.*
>
> *I constantly see truck drivers speeding, overtaking cars on dangerous occasions or starting to overtake and then come onto the car, so the car has to brake to allow it in or crash. They are careless and cause a lot of road accidents. Freight really would be best to be moved by rail and then transported locally by truck or van! Van drivers are OK generally.*

Table 30: Reasons for the general public's perception of professional road freight drivers

Please provide a detailed explanation for the reason why you've rated your perceptions of professional road freight drivers as [insert answer from previous question]?

Base =	Total general public 1005 %	Respondents with negative perceptions 68 %	Respondents with neither positive nor negative 347 %	Respondents with positive perceptions 507 %
Positive themes:				
Professionalism and skill	31	0	8	49
Essential service and economic contribution	20	3	14	25
Hard work and long hours	13	1	4	21
Respect for the profession	12	0	1	20
Negative themes:				
Road safety concerns	21	73	13	19
Mixed driving behaviour	16	7	34	5
Negative experiences with driving behaviour	12	78	13	2
Poor industry conditions	3	5	1	3

Note: Total may exceed 100 percent because of multiple response.
* Based on respondents who provided a valid answer to the question.
.

7.3 Responding to roadside incidents and crashes

Industry respondents were asked whether, in the last 12 months, their road freight drivers had **provided assistance in a roadside incident or crash** and if they had, whether they were the first responder to that/any of those incidents. Table 31 presents the results to this questioning, with the key findings being:

- Over one-half of industry respondents stated that, in the last 12 months, they had assisted in a roadside incident or crash (58%) and in almost two-thirds of these cases, they were the first responder (62%).
- There are no statistically significant differences between Transporting New Zealand members and non-members.

Table 31: Roadside incidents or crashes

In the past 12 months, have you or your drivers assisted in a roadside incident or crash?

And on this/any of these occasions, were you or they the first responder?

Base =	Total 194 %	TNZ members 116 %
Assisted in a roadside incident/crash:		
Yes	58	57
No	34	37
Total	100	100
First responder*:		
Yes	62	59
No	38	41
Total	100	100

Note: Total may not add to 100 percent due to rounding.
* Based on respondents who had assisted in a roadside incident/crash (n=112).

Appendix A: Industry survey questionnaire, survey invitation, reminder emails

NATIONAL ROAD FREIGHT SURVEY

Research New Zealand

DATE: JANUARY 2025 (Version 7)
PN: 5380

THIS SURVEY IS OF DIRECT BENEFIT TO YOU AND THE TRANSPORT INDUSTRY:

- The results of the survey will be used by Transporting New Zealand, a national road freight association, to understand **what's important and of concern** to the road freight industry, and to **share your priorities and challenges** with policy makers.
- The survey is intended for road freight transport businesses **owners**, **managers**, **drivers**, and **other staff members.**
- Appropriate survey reporting will be shared with all survey participants, with insights then shared with policy makers, industry participants and the public.

COMPLETE THE SURVEY & GO INTO A PRIZE DRAW:

- The survey is **voluntary**.
- It should take up to 10 minutes to complete - most of the questions are of a **tick box type**, but we've left space if you want to add comments.
- To move from one page of the survey to the next, please **click the *Next* button**.
- You can complete the survey in several sessions - simply exit the survey, it will be saved automatically. To return, simply click on the survey link to pick up where you left off.
- Everyone who completes the survey goes into a prize draw for a $500 House of Travel voucher **and** a $500 Bridgestone voucher.

CONFIDENTIALITY:

The answers you provide are completely **confidential** and **anonymous**.

Research New Zealand (www.researchnz.com) is managing the survey on Transporting New Zealand's behalf, but Transporting New Zealand will not receive any individual respondent's results, or any details about who has completed the survey.

Research New Zealand meets the requirements of the 2020 Privacy Act. You can view the privacy policy here.

NEW PAGE

What issues are important and of concern to you for the future of the road freight industry?

1. Listed below are several issues, identified by others in the road freight industry, as being important and/or of concern to them.

   Which of these is most important and/or of concern **to you**? Rank up to five issues, by writing 1, 2, 3, 4 or 5 next to them.

   Rank up to FIVE issues, with 1=the 'most important', 2=the 'next most important', etc. ***RDN***

	Rank
Business costs and economic pressures	
Workforce challenges	
Road safety	
Sustainability and decarbonisation	
Health, safety and wellbeing of drivers	
Public perception and industry reputation	
Regulatory requirements and compliance	
State of the roading network (e.g., poor road surfacing, insufficient overtaking facilities, Cook Strait ferry reliability, Desert Road closure)	
Funding transport infrastructure and improvements development (i.e. tolling, RUC increases, congestion charging, additional government borrowing)	

DEPENDING ON THE RANKING, MEMBERS WILL BE TAKEN TO THE QUESTIONS ON EACH OF THEIR TOP FIVE ISSUES.

New page

2. The following statements relate to one of the issues you ranked, **business costs and economic pressures**.

   Using the scale along the top, please tell us how much you agree or disagree with each of the statements about this topic?

Please select one answer for each statement ***RDN***

	1 Strongly disagree	2	3	4	5 Strongly agree	Don't know
My business currently has sustainable operating margins	❍	❍	❍	❍	❍	❍
I believe my business will be financially better off in 12 months	❍	❍	❍	❍	❍	❍
I believe the government is on the right economic track	❍	❍	❍	❍	❍	❍

2a If you would like to add any comments about **business costs and economic pressures**, please do so here.

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New page

3. The following statements relate to one of the issues you ranked, **workforce challenges**.

   Using the scale along the top, please tell us how much you agree or disagree with each of the statements about this topic?

Please select <u>one answer for each statement</u> ***RDN***

	1 Strongly disagree	2	3	4	5 Strongly agree	Don't know
The current heavy vehicle driver licensing system makes it too difficult for new entrants to join the road freight industry	❍	❍	❍	❍	❍	❍
Our industry needs to attract more young people	❍	❍	❍	❍	❍	❍
Diversity is a good thing for our industry	❍	❍	❍	❍	❍	❍

3a If you would like to add any comments about **workforce challenges**, please do so here.

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New page

4. The following statements relate to one of the issues you ranked, **road safety**.

   Using the scale along the top, please tell us how much you agree or disagree with each of the statements about this topic?

*Please select <u>one answer for each statement</u> **RDN***

	1 Strongly disagree	2	3	4	5 Strongly agree	Don't know
Police are adequately policing RIDS behaviours (restraints, impairment, distraction, speed)	❍	❍	❍	❍	❍	❍
Driver education should be improved to encourage better driving by the public	❍	❍	❍	❍	❍	❍
Current road safety campaigns are effective	❍	❍	❍	❍	❍	❍

4a If you would like to add any comments about **road safety**, please do so here.

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New page

5. The following statements relate to one of the issues you ranked, **sustainability and decarbonisation**.

   Using the scale along the top, please tell us how much you agree or disagree with each of the statements about this topic?

*Please select one answer for each statement **RDN***

	1 Strongly disagree	2	3	4	5 Strongly agree	Don't know
Customers are increasingly asking how our business is managing our carbon emissions	❍	❍	❍	❍	❍	❍
Our industry should play a leading role in mitigating emissions and climate change	❍	❍	❍	❍	❍	❍
I know what the government's current transport emissions reductions targets are	❍	❍	❍	❍	❍	❍
My business would like to shift to lower or zero tail-pipe emission vehicles (hydrogen, dual fuel, or EV) within the next five years if possible	❍	❍	❍	❍	❍	❍

5a If you would like to add any comments about **sustainability and decarbonisation**, please do so here.

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New page

6. The following statements relate to one of the issues you ranked, **health, safety and the wellbeing of drivers**.

   Using the scale along the top, please tell us how much you agree or disagree with each of the statements about this topic?

*Please select <u>one answer for each statement</u> **RDN***

	1 Strongly disagree	2	3	4	5 Strongly agree	Don't know
It is challenging to achieve a good work-life-balance while working as a truck driver	❍	❍	❍	❍	❍	❍
Driving hours are about right with sufficient rest breaks	❍	❍	❍	❍	❍	❍
We need more purpose-designed rest stops for truck drivers	❍	❍	❍	❍	❍	❍

6a If you would like to add any comments about **health, safety and the wellbeing of drivers**, please do so here.

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New page

7. The following statements relate to one of the issues you ranked, **public perception and industry reputation**.

   Using the scale along the top, please tell us how much you agree or disagree with each of the statements about this topic?

*Please select one answer for each statement **RDN***

	1 Strongly disagree	2	3	4	5 Strongly agree	Don't know
Our truck drivers regularly experience abuse from members of the public while working	❍	❍	❍	❍	❍	❍
Public opinion of the road freight industry has improved in recent years.	❍	❍	❍	❍	❍	❍
Overall, the public appreciates the importance of the work we do	❍	❍	❍	❍	❍	❍

7a If you would like to add any comments about **public perception and industry reputation**, please do so here.

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New page

8. The following statements relate to one of the issues you ranked, **regulatory requirements and compliance**.

   Using the scale along the top, please tell us how much you agree or disagree with each of the statements about this topic?

*Please select <u>one answer for each statement</u> **RDN***

	1 Strongly disagree	2	3	4	5 Strongly agree	Don’t know
Regulatory requirements and compliance obligations are a challenge to the economic viability of my business	❍	❍	❍	❍	❍	❍
Regulations have become far too complex and should be simplified	❍	❍	❍	❍	❍	❍
I believe NZTA is doing a good job regulating our industry	❍	❍	❍	❍	❍	❍
I believe Police/CVST are doing a good job of policing our industry	❍	❍	❍	❍	❍	❍

8a If you like to add any comments about **regulatory requirements and compliance**, please do so here.

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New page

9. The following statements relate to one of the issues you ranked, **state of the road network**.

   Using the scale along the top, please tell us how much you agree or disagree with each of the statements about this topic?

*Please select <u>one answer for each statement</u> **RDN***

	1 Strongly disagree	2	3	4	5 Strongly agree	Don't know
Regional roads, including bridges, tend to get ignored	❍	❍	❍	❍	❍	❍
The poor maintenance of the roading network is endangering truck drivers and other road users	❍	❍	❍	❍	❍	❍
The delay in replacing the Cook Strait ferries is a major risk for our industry and economy	❍	❍	❍	❍	❍	❍

9a If you would like to add any comments about **state of the road network**, please do so here.

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New page

10. The following statements relate to one of the issues you ranked, **funding transport infrastructure and improvements development**.

    Using the scale along the top, please tell us how much you agree or disagree with each of the statements about this topic?

*Please select one answer for each statement **RDN***

	1 Strongly disagree	2	3	4	5 Strongly agree	Don't know
I agree with increased use of tolling to fund the Roads of National Significance	❍	❍	❍	❍	❍	❍
Fuel excise duty should be replaced by universal road user charges for all vehicle types	❍	❍	❍	❍	❍	❍
The government should borrow more to fund infrastructure	❍	❍	❍	❍	❍	❍
I support the concept of congestion charging to reduce delays at peak times	❍	❍	❍	❍	❍	❍
Road freight should be exempt from congestion charging	❍	❍	❍	❍	❍	❍

10a If you would like to add any comments about **funding transport infrastructure and improvements development**, please do so here.

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NEW PAGE

Making progress on the issue that is most important and of concern to you

11. In Question 1 you ranked [... issue...] **first**, identifying it as the 'most important' for the road freight industry to address.

    Thinking about this issue, what, in your opinion would be the most positive outcome? And how would the industry best get there?
    Please provide as detailed an answer as possible

The best outcome:____

____

____

____

The best way of getting there:____

____

____

____

New page

Your opinions about workforce issues

12. Which of the following have applied to your business in the **last 2 years**?
    Please tick all that apply
    - 1 ....We have employed road freight drivers, new to the industry
    - 2 ....We have employed road freight drivers who previously worked for other road freight firms
    - 3 ....We have tried to employ road freight drivers, but have <u>not</u> found any who are suitable
    - 4 ....We have <u>not</u> been employing new drivers in the last 2 years

13. IF Q12=1-3 ASK, OTHERWISE SKIP TO Q15 Has your business employed/considered employing **overseas drivers**?
    - 1 ....Yes, we have employed overseas drivers
    - 2 ....Yes, we have considered employing overseas drivers (but have not employed any as yet)
    - 3 ....No, we have not employed any overseas drivers/considered employing them

14. IF Q12=1-2 ASK, OTHERWISE SKIP TO Q15 Which of the following driver skills or training, if any, have you found lacking in the drivers you have employed?
    - 1 ....Technical driving ability (e.g., backing, operating on hills or difficult terrain)
    - 2 ....Vehicle maintenance, load securing, and route planning
    - 3 ....Safe driving practices and road safety awareness
    - 4 ....Communication, customer service, and stress management
    - 96 Other (Please specify what this is here: ____________________)
    - 97...Have <u>not</u> found any skills/training lacking
    - 98...Don't know

15. Which of the following does your business currently provide in terms of flexible working arrangements for its drivers?
    - 1 ....Flexible rostering
    - 2 ....Unpaid leave
    - 96...Other (Please specify what this is here: ____________________________)
    - 97...We do not provide alternative work options
    - 98...Don't know

16. What percentage of your business's current road freight drivers do you expect will retire/leave the industry in the **next 5 years**?
    - 1 ....<u>No</u> drivers will retire/leave the industry in the next 5 years
    - 2 ....Up to 10%
    - 3 ....Up to 25%
    - 4 ....Up to 50%
    - 5 ....Up to 75%
    - 6 ....Up to 100%
    - 98...Don't know

New page

Your opinions about the general public's perceptions of the road freight industry

17. How would you rate the general public's perception of professional road freight drivers?

    1 ....Very negative
    2 ....Negative
    3 ....Neutral
    4 ....Positive
    5 ....Very positive
    98...Don't know

18. IF Q17 = 1-5 ASK, OTHERWISE SKIP TO Q19 Please provide a detailed explanation for the reason why you've rated the general public's perception as [insert answer from Q17]? – [DON'T FORCE A RESPONSE]

    ____
    ____
    ____
    ____

19. In the past 12 months, have you or your drivers assisted in a roadside incident or crash?

    1 ....Yes
    2 ....No
    98...Don't know

20. IF Q19 = 1 ASK, OTHERWISE SKIP TO Q21 And on this/any of these occasions, were you or they the first responders?

    1 ....Yes
    2 ....No

NEW PAGE

Final questions - About you

21. About how many years have you been involved in the road freight industry in New Zealand?
    1 ....Up to and including 5 years
    2 ....6-10 years
    3 ....11-15 years
    4 ....16-20 years
    5 ....21-25 years
    6 ....26 years or more

22. What position best describes your role in your road freight business?
    1 ....Owner
    2 ....Owner Driver
    3 ....Manager
    4 ....Driver
    5 ....Non-driver staff member
    96...Other (Please specify what this is here: ________________)

23. How many road freight drivers does your business currently employ?
    1 ....0 (single truck/owner-operator)
    2 1
    3 2-5
    4 6-10
    5 11-20
    6 21-30
    7 31-50
    8 ....51+
    98...Don't know

24. Where is your business based?
    1 ....Northland
    2 ....Auckland
    3 ....Waikato
    4 ....Bay of Plenty
    5 ....Gisborne
    6 ....Hawke's Bay
    7 ....Taranaki
    8 ....Manawatū-Whanganui
    9 ....Wellington-Wairarapa
    10...Tasman
    11...Nelson
    12...Marlborough
    13...West Coast
    14...Canterbury
    15...Otago
    16...Southland

25. What freight sector does your business operate in? *Please tick all that apply*

1 ....Bulk & specialised
2 ....General
3 ....Heavy Haulage/Oversized
4 ....Livestock & rural
5 ....Logging
6 ....Ports & intermodal
7 ....Postal & courier
8 ....Other (please specify)

26. Are you a Transporting New Zealand member?

1 ....Yes
2 ....No

27. Thank you for completing this survey. If you have any other comments you would like to make, particularly about any other issues facing the road freight industry that we have not covered, please do so here.

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Would you like to enter the prize draw for a $500 House of Travel voucher and a $500 Bridgestone voucher?

1	Yes, I would like to enter the prize draw	1 – Fill in details
2	No, I would not like to enter the prize draw	2 – Close Survey

Please enter your name and contact details here:

Your name*:	
Your road freight company's name:	
Your preferred email address*:	
Your contact telephone number:	

*Required fields

Rangahau Aotearoa
Research New Zealand

Ia Ara Aotearoa
Transporting
NEW ZEALAND

Hello [First Name]

This is an invitation to complete the National Road Freight Survey about the **current state** of the road freight industry in New Zealand. This survey is intended for road freight transport businesses owners, managers, drivers, and other staff members.

The survey is being completed by independent research firm, Research New Zealand on behalf of Transporting New Zealand, a national road freight association. The results of this national survey will be used by Transporting New Zealand to better understand the priorities and challenges facing the road freight industry. Results and reporting will be shared with participants, policy makers, and the media and general public.

The answers you provide are completely **confidential** and **anonymous**. Transporting New Zealand will not receive any individual respondent's results, or any details about who has completed the survey.

Your participation is completely voluntary. If you decide to complete the survey, it will take up to 10 minutes depending on your answers.

You can access the survey by clicking on the link below.
<INSERT LINK HERE>

Everyone who completes the survey goes into a prize draw for a $500 House of Travel voucher **and** a $500 Bridgestone voucher.

If you have any queries, please email me at annita@researchnz.com

Kind regards

Annita Wood
RESEARCHER
Rangahau Aotearoa | Research New Zealand

Rangahau Aotearoa Research New Zealand

Ia Ara Aotearoa Transporting NEW ZEALAND

Dear [First Name]

This is a follow-up invitation to complete the National Road Freight Survey about the **current state** of the road freight industry in New Zealand.

This is an **important survey**. The results of this survey will be used by Transporting New Zealand to better understand the priorities and challenges facing the road freight industry. Results and reporting will be shared with policy makers, as well as respondents and the media.

Should you choose to complete the survey, your answers to the questions will be completely **confidential** and **anonymous**. Transporting New Zealand will not receive any individual respondent's results, or any details about who has completed the survey.

You can access the survey by clicking on the link below.
<INSERT LINK HERE>

Everyone who completes the survey goes into a prize draw for a $500 House of Travel voucher **and** a $500 Bridgestone voucher.

If you have any queries, please email me at annita@researchnz.com

Ngā mihi

Annita Wood
RESEARCHER
Rangahau Aotearoa | Research New Zealand

Dear [First Name]

This is a friendly reminder to complete the National Road Freight Survey about the **current state** of the road freight industry in New Zealand.

If you've completed the survey already **thank you** for your help. You're in the prize draw for a $500 House of Travel voucher **and** a $500 Bridgestone voucher.

The survey is voluntary, however, the survey results will be used by Transporting New Zealand to better understand the priorities and challenges facing the road freight industry.

We want to ensure you that your feedback is completely **confidential** and **anonymous**. Transporting New Zealand will not receive any individual respondent's results, or any details about who has completed the survey.

If you still want to complete the survey, please click the link below. It should take up to 15 minutes, depending on your answers:
<INSERT LINK HERE>

If you have any queries, please email me at annita@researchnz.com

Kind regards

Annita Wood
RESEARCHER
Rangahau Aotearoa | Research New Zealand

Appendix B: A profile of the respondents who completed the industry survey

Table 32: Respondent profile – Industry survey

Base =	Total 194 %
Years involved in the road freight industry:	
Up to and including 5 years	5
6-10 years	15
11-15 years	8
16-20 years	7
21-15 years	15
26 years or more	50
Total	100
Position role:	
Owner	32
Owner driver	10
Manager	24
Driver	22
Non-driver staff member	4
Other (please specify)	9
Total	100

Continued

Table 32: Respondent profile – Industry survey (continued)

Base =	Total 194 %
Number of road freight drivers employed:	
0 (single truck/owner-operator)	7
One	3
2-5	20
6-10	12
11-20	12
21-30	9
31-50	9
51+	22
Don't know	6
Total	100

Continued

Table 32: Respondent profile – Industry survey (continued)

Base =	Total 194 %
Location of business base:	
Northland	2
Auckland	12
Waikato	18
Bay of Planty	7
Gisborne	2
Hawke's Bay	11
Taranaki	3
Manawatū/Whanganui	6
Wellington-Wairarapa	8
Tasman	1
Nelson	1
Marlborough	3
West Coast	0
Canterbury	20
Otago	4
Southland	4
Total	100

Continued

Table 32: Respondent profile – Industry survey (continued)

Base =	Total 194 %
Transporting New Zealand member:	
Yes	60
No	40
Total	100

Note: Total may not add to 100 percent due to rounding.

Appendix C: General public survey questionnaire

GENERAL PUBLIC QUESTIONNAIRE – Transporting New Zealand

1. Would you say your perception of professional road freight drivers is …?

1 Very negative
2 Negative
3 Neutral
4 Positive
5 Very positive
98 Don't know

2. IF Q1 = 1-5 ASK, OTHERWISE SKIP TO Q3 Please provide a detailed explanation for why your perception rating is [insert answer from Q1]?

____

____

____

____

3. Which of the following methods of personal transport would you use during a normal week? MULTIPLE RESPONSE

1 A car
2 A motorcycle/scooter
3 An electric scooter/bike
4 A bicycle
5 A van/truck
6 Public transport (e.g., bus, train)
7 Taxi, Uber
8 Car pooling
9 Walking
96 Other

Appendix D: A profile of the respondents who completed the General Public survey

Table 33: Respondent profile – General public survey

Base =	Total 1005 %
Age:	
18-34 years	30
35-54 years	34
55+ years	37
Total	100
Gender:	
Male	49
Female	51
Other	0
Total	100

Continued

Table 33: Respondent profile – General public survey (continued)

Base =	Total 1005 %
Northland	7
Auckland	34
Waikato	8
Bay of Planty	6
Gisborne	0
Hawke’s Bay	3
Taranaki	2
Manawatū/Whanganui	6
Wellington-Wairarapa	10
Tasman	1
Nelson	1
Marlborough	1
West Coast	2
Canterbury	12
Otago	6
Southland	1
Total	100

Note: Total may not add to 100 percent due to rounding.