

BMRB SURVEY OF FOREIGN REGISTERED LORRIES FOR DETR

Introduction

The survey was carried out for DETR to provide information about the extent to which foreign operators undertake haulage activity entirely within the UK (cabotage). It also provides some additional information about the activities of foreign-registered vehicles in the United Kingdom.

It was designed in consultation with the Road Haulage Association (RHA) and conducted by the British Market Research Bureau (BMRB) Ltd on behalf of DETR. The RHA and the Freight Transport Association were also involved in discussions on the proposed survey after the pilot survey results were known.

Methodology

Following a pilot survey in December 1999, the survey was carried out from 13 January to 9 February 2000 at the Ashford Services Truckstop. This is used as a rest stop for drivers on the M20 travelling to/from the Channel Tunnel or the Port of Dover. (The Channel Tunnel and the Channel Ports together account for over 80 per cent of foreign registered goods vehicles leaving the UK each year.) Interviews were carried out with 1,019 drivers of foreign registered lorries that were leaving the United Kingdom. Possible language difficulties were overcome by the use of foreign language speaking interviewers. A copy of the questionnaire used for the interviews is attached. It was available in five languages as well as English. Drivers were interviewed in the restaurant/rest area after they had left their lorries in the lorry park.

Summary of results

The results of the survey confirm that, as previously estimated from the permit system, the cabotage penetration rate of foreign operators in the United Kingdom is very small, at about 0.06 per cent (Annex A). This figure is consistent with recently published estimates made by the European Commission (EC) for individual member states, based on the old system of permits.¹

The majority (68 per cent) of foreign registered vehicles picked up goods to take back out of the UK, although most only took one consignment. By comparison, DETR's International Road Haulage Survey indicates that around 90 per cent of UK registered vehicles carrying loads on international journeys from the UK are partly or fully loaded on their return.

Cabotage - Overall estimate

- The cabotage penetration rate was estimated from the survey results to be 0.06 per cent. Details of the estimate are provided at Annex A.

The lorries and their drivers (Table 1)

- One third of the vehicles were registered in France, nearly a third in Belgium/Netherlands and eighteen per cent in the Republic of Ireland. No other country had a share greater than five per cent.
- Thirty per cent of the drivers lived in France, 21 per cent in Belgium/Netherlands and 12 per cent in the Republic of Ireland. In addition, 21 per cent lived in the United Kingdom. They drove vehicles registered in a variety of countries.
- Ten per cent of the drivers said that they were working for United Kingdom operators. Their vehicles were mainly registered in the Netherlands, or to a lesser extent the Republic of Ireland.

Consignments brought into the United Kingdom (Tables 2 and 3)

- A negligible number of vehicles (one per cent) were empty when they arrived in the country; just over two thirds had brought in one consignment.
- Thirty six per cent of vehicles bringing goods into the UK were registered in France, followed by Netherlands (21 per cent), Belgium (12 per cent), and Ireland (10 per cent).

Cabotage (a consignment loaded and unloaded in the UK by a foreign operator) (Tables 4 and 5)

- Only three per cent of drivers reported that they had carried out cabotage work whilst in the UK, and most of these had just picked up one consignment.
- Nearly three quarters of the vehicles carrying out cabotage were registered in France, Netherlands or Belgium.

Additional points relating to cabotage

- The average cabotage consignment was 3,000 tonne-kms.
- A quarter of the contracts for cabotage work were obtained after arrival in the UK.

Consignments loaded in the UK to be unloaded in Europe (Tables 6 and 7)

- Two thirds of vehicles had picked up goods to take back out of the UK; fifty nine per cent were carrying just one consignment.
- As was the case with goods being brought into the country, the highest percentage of vehicles with return loads were registered in France (38 per cent), followed by Netherlands (25 per cent) and Belgium (10 per cent).

Related EC estimates

The second EC report on cabotage¹ has recently been published. It provides estimates, based on permits issued, of the cabotage penetration rate (cabotage as a percentage of national transport) in each of the Member States. The latest full year for which figures are available is 1997. The report indicates that UK penetration rate was 0.05 per cent in 1997. The report also provides evidence, based on survey data from five Member States that accounted for about half of the cabotage carried in the EC, that there was little increase in cabotage in the second half of 1998 following the abolition of quantitative restrictions in July 1998.

Quality of data

It is believed that the survey has produced a reliable estimate of the magnitude of cabotage in the UK. However, although the survey methodology was sound, and good response from the drivers led to a substantial sample being achieved, the detailed results must be treated with some caution. They relate only to traffic through the Channel Tunnel and the Channel Ports (which together account for over 80 per cent of foreign registered goods vehicles leaving the UK each year), and the survey was only carried out for one month during the year. In addition the achieved sample of cabotage consignments provides a small base for analysis.

There is no reason however to think that interviewing drivers only at the Truck Stop has produced unrepresentative results. Only a few of the drivers interviewed had their journey documentation with them in the rest area when answering the questionnaire, but it is not thought that this would have had any significant effect on the accuracy of the data provided. There was feedback from interviewers that some Eastern European drivers were somewhat vague about the work that they had done in Britain. However, these accounted for less than three per cent of the drivers in the sample and so the overall accuracy of survey results is unlikely to have been significantly affected.

A number of the lorries registered in the Irish Republic were carrying goods through the UK for delivery outside the UK. These consignments have been excluded from Tables 2 and 6, because they were not loaded/unloaded in the UK. However, the journeys have been retained in Table 4 and 5 because, although they were in transit through the UK, the lorries also had the opportunity to carry out cabotage

Contact point

Further details on this BMRB survey can be obtained from Chris Overson, Transport Statistics Freight Division, Department of the Environment, Transport and the Regions, Great Minster House, 76 Marsham Street, London SW1P 4DR, telephone 020 7944 4276.

1. Second report on the implementation of Regulation (EEC) 3118/93 laying down the conditions under which non-resident carriers may operate national road haulage services within a Member State (Cabotage). Published 1 March 2000.

CABOTAGE PENETRATION RATE

1. The cabotage penetration rate is a measure of the cabotage activity undertaken by foreign operators.
2. For the UK, it is defined as:

tonne-kms moved, by foreign-operated vehicles, in the UK where goods are both loaded and unloaded in the UK

as a percentage of

national transport, ie tonne-kms moved by UK-registered vehicles in the UK

3. The results from the cabotage survey indicate that the current **cabotage penetration rate is about 0.06 per cent**. This is a similar order of magnitude to the estimate of 0.05 per cent in 1997, based on EC data derived from authorisation permits.
4. In calculating this rate, the number of foreign-registered vehicles has been used as a proxy for the number of foreign-operated vehicles. Additionally, it has been assumed that:
 - the number of foreign-registered vehicles entering the UK is 850,000 per annum. This is based on the quarterly mean of 209,000 foreign-registered vehicles leaving the UK, for the four quarters ending Q3 1999 (source: Ro-Ro Enquiry)
 - tonne-kms moved by UK-registered vehicles in the UK is 155,431 million – the figure recorded by CSRGT in 1998

Each of these assumptions has been tested for sensitivity but none has a significant effect on the overall estimate.

The estimated rate is based on a total sample of 1019 foreign registered vehicles. Twenty seven vehicles working for foreign operators reported undertaking cabotage.

Table 1 : Vehicles, drivers and operators by country

	Percentage		
	Country of registration of vehicle	Country of residence driver	Nationality of operator
France	33	30	32
Netherlands	20	11	15
Belgium	11	10	10
United Kingdom	0	21	10
Ireland	18	12	16
Germany	5	5	5
Other	14	11	13
	100	100	100

Table 2 : Vehicles entering the UK by number of consignments¹ carried

Number of consignments	Percentage
0	1
1	71
2	13
3	7
4 or more	8
	100

1. A consignment is a load of goods for delivery to a single address.

Table 3 : Vehicles bringing goods into the UK (for unloading) by country of registration of vehicle

Country of registration	Percentage
France	36
Netherlands	21
Belgium	12
Ireland	10
Germany	5
Others	15
	100

Note : Tables 4 and 5 relate to work carried out by foreign operators

Table 4 : Cabotage : Vehicles loading and unloading consignments in the UK

<u>Number of consignments</u>	<u>Percentage</u>
0	97
1	2
2	1
3	-
4 or more	-
	100

Table 5 : Vehicles carrying out cabotage by country of registration of vehicle

<u>Country of registration</u>	<u>Percentage</u>
France	41
Netherlands	15
Belgium	15
Ireland	7
Germany	0
Others	22 ¹
	100

1. Italy, Spain, Luxembourg

Table 6 : Vehicles leaving with goods loaded in the UK by number of consignments carried

<u>Number of consignments</u>	<u>Percentage</u>
0	31
1	59
2	7
3	1
4 or more	2
	100

Table 7 : Vehicles taking goods out of the UK by country of registration of vehicle

<u>Country of registration</u>	<u>Percentage</u>
France	38
Netherlands	25
Belgium	10
Ireland	6
Germany	5
Others	17
	<hr/>
	100

LORRY DRIVERS SURVEY

JN: 1154 588
(1 - 7)

OFFICE USE ONLY

Serial No _____ (8 - 11) Date:---/---/---- Interviewer No _____
Time: -- : -- am/pm

Please answer these questions thinking about the journey to the UK you have just made, and the work that you have done during that time.

CARD 1 12 - 13 (0) (1)

Q1. Which country do you live in?
(Please tick ONE only)

(14)	(15)
1 <input type="checkbox"/> France	1 <input type="checkbox"/> Republic of Ireland
2 <input type="checkbox"/> Netherlands	2 <input type="checkbox"/> Italy
3 <input type="checkbox"/> Belgium	3 <input type="checkbox"/> Sweden
4 <input type="checkbox"/> Spain	4 <input type="checkbox"/> Austria
5 <input type="checkbox"/> Denmark	5 <input type="checkbox"/> Portugal
6 <input type="checkbox"/> Norway	6 <input type="checkbox"/> OTHER (write name below)
7 <input type="checkbox"/> Switzerland	_____ (16-17)
8 <input type="checkbox"/> Germany	

Q2. In what country is the vehicle you are driving licensed?
(Please tick ONE only)

(18)	(19)
1 <input type="checkbox"/> France	1 <input type="checkbox"/> Republic of Ireland
2 <input type="checkbox"/> Netherlands	2 <input type="checkbox"/> Italy
3 <input type="checkbox"/> Belgium	3 <input type="checkbox"/> Sweden
4 <input type="checkbox"/> Spain	4 <input type="checkbox"/> Austria
5 <input type="checkbox"/> Denmark	5 <input type="checkbox"/> Portugal
6 <input type="checkbox"/> Norway	6 <input type="checkbox"/> OTHER (write name below)
7 <input type="checkbox"/> Switzerland	_____ (20-21)
8 <input type="checkbox"/> Germany	

Q3. What is the nationality of the operator you are working for?
(Please tick ONE only)

(22)	(23)
1 <input type="checkbox"/> France	1 <input type="checkbox"/> Republic of Ireland
2 <input type="checkbox"/> Netherlands	2 <input type="checkbox"/> Italy
3 <input type="checkbox"/> Belgium	3 <input type="checkbox"/> Sweden
4 <input type="checkbox"/> Spain	4 <input type="checkbox"/> Austria
5 <input type="checkbox"/> Denmark	5 <input type="checkbox"/> Portugal
6 <input type="checkbox"/> Norway	6 <input type="checkbox"/> OTHER (write name below)
7 <input type="checkbox"/> Switzerland	_____ (24-25)
8 <input type="checkbox"/> Germany	

Q4. What is the permitted gross weight, in tonnes, of the vehicle you are driving?
_____ (tonnes)

(26 - 29)

Q5b. How many consignments have you loaded in the UK on this journey, for delivery to another location also in the UK?

Total Number of consignments: _____
(14 – 16)

Please give details of up to four below (if more than four, then please think about the four heaviest).

NOTE : By "consignment" we mean a load of goods which you have delivered, or will deliver, to a single address.

	Town/city in UK where consignment was loaded	Town/city in UK where consignment was unloaded	Date of loading consignment (day/month) e.g 19 th December = 19/12	Date of unloading consignment (day/month) e.g. 20 th December = 20/12	Tonnes in Consignment	Did you(Tick one box)				
						..get the contract before arriving in the UK?	...arrive in the UK and look for a contract (with no prior arrangement?)	..get contract on a previous journey to the UK	..get the contract after arriving in the UK to deliver another consignment?	Don't know/ can't remember
1	CARD 07 12-13 (7) (7) (14-15)	(16-17)	___/___ (18-21)	___/___ (22-25)	_____ (Tonnes) (26-29)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
2	CARD 08 12-13 (8) (8) (14-15)	(16-17)	___/___ (18-21)	___/___ (22-25)	_____ (Tonnes) (26-29)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
3	CARD 09 12-13 (9) (9) (14-15)	(16-17)	___/___ (18-21)	___/___ (22-25)	_____ (Tonnes) (26-29)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
4	CARD 10 12-13 (10) (10) (14-15)	(16-17)	___/___ (18-21)	___/___ (22-25)	_____ (Tonnes) (26-29)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

CARD 11 12 – 13 (1) (1)

Q5c. And how many consignments have you loaded in the UK to be unloaded in another European country?

Total Number of consignments: _____
(14 – 16)

Please give details of up to four below (if more than four, then please think about the four heaviest).

NOTE : By "consignment" we mean a load of goods which you have delivered, or will deliver, to a single address.

Please look at the map of Europe when completing this question and write in the **code number**, not the name, of the region.

	Town/City in UK Where consignment was loaded	Region of Europe where consignment was (or will be) unloaded	Date of loading consignment (day/month) e.g.19 th December = 19/12	Date of unloading consignment (day/month) e.g.20 th December = 20/12	Tonnes In Consignment
1	CARD 12 12-13 (1) (2) (14-15)	(16-17)	___/___ (18-21)	___/___ (22-25)	_____ (Tonnes) (26-29)
2	CARD 13 12-13 (1) (3) (14-15)	(16-17)	___/___ (18-21)	___/___ (22-25)	_____ (Tonnes) (26-29)
3	CARD 14 12-13 (1) (4) (14-15)	(16-17)	___/___ (18-21)	___/___ (22-25)	_____ (Tonnes) (26-29)
4	CARD 15 12-13 (1) (5) (14-15)	(16-17)	___/___ (18-21)	___/___ (22-25)	_____ (Tonnes) (26-29)

NOW PLEASE TURN OVER TO ANSWER THE LAST FEW QUESTIONS

Finally, looking again at the map of Europe, showing the code numbers assigned to each region, please answer the next two questions.

Q7a. Where did your journey to the UK begin?

REGION code number: _____
(14 – 15)

Q7b. What is your final destination, after leaving the UK?

REGION code number: _____
(16 – 17)

Q8. Have you been able to refer to your documentation (i.e. written details of your collections and deliveries) whilst completing this questionnaire?

(18)

Yes 1

No 2

Q9. Are you intending to travel on the train or the ferry?

(19)

Train 1

Ferry 2

Q10. At what time of the day do you plan to leave the UK? Please use the 24 hour clock.

____ / ____ OR Don't know 1
(20 – 23) (24)

Please now return your form to one of the interviewers. Remember that all your answers are completely confidential, and will be studied only together with many other drivers' responses.

THANK YOU VERY MUCH FOR YOUR HELP WITH THIS SURVEY.

We wish you a safe journey.