

Freight & Logistics Social Licence Campaign Development

Freight and Logistics Council of WA (FLCWA)
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Contents



3	Background, Approach & Sample Profile
9	Perceptions & Knowledge of Freight
39	Key Benefits & Concerns
62	Prioritising Concerns
86	Developing the Campaign
100	Key Insights

Background, Approach & Sample



Background

The Freight and Logistics Council of Western Australia (FLCWA) is a not for profit, Government funded organisation which provides independent advice to the State Minister for Transport on strategic policy issues impacting the delivery of successful freight services in the State.

Council members recognise the importance of the industry's social licence to the successful delivery of road, rail, air and port infrastructure projects and freight transport operations. As a result, the FLCWA is considering a public campaign in WA to build and enhance the social licence of the freight industry. The focus of the campaign would be to increase community awareness and understanding of the freight task and the role freight plays in everyday lives. The aim is to do this by developing a targeted awareness campaign designed to inform, educate and promote the importance of freight.

To ensure the effectiveness of a social licence for freight strategy, FLCWA desired a campaign strategy to be research driven and informed by the findings.

This report includes the results from both the qualitative and quantitative phases.



A Mixed Method Approach...

To guide the FLCWA's strategic direction and development of a social licence campaign, a mixed method study was conducted involving in-depth focus groups and a Perth Metro general population survey.

The Focus Groups

- ▶ The aim of the focus groups was to uncover key insights and perceptions of freight and facilitate meaningful discussion about developing a social licence campaign, and inform the survey development.
- ▶ Two groups of 90 minutes were run with members of the Perth metropolitan community on the 15th April, 2019.
- ▶ Groups were split by age: 18-34 years old (n=10) and 35+ years old (n=8).
- ▶ Prior to the focus groups, participants completed a homework task to encourage them to consider relevant issues.
- ▶ Each participant was given an \$80 incentive for their contribution.

The Survey

- ▶ The primary aim of the quantitative survey was to establish baseline measures of community attitudes and perceptions of freight, and to identify externalities of greatest concern to Perth residents.
- ▶ The online survey was completed by n=613 respondents aged 18+ from the Perth metropolitan area, yielding a margin of error of +/- 3.98% (a sufficiently robust and representative sample).
- ▶ Interlocking age and gender quotas were set to ensure the sample was representative of the Perth general population. All data was post-weighted according to ABS data.
- ▶ Survey duration was approximately 15 minutes.

Some analytical pointers...



Strength of Response

Ticks and crosses represent how often a specific sentiment was mentioned in the focus groups. Responses are graded on a scale from ✓✓✓✓✓ - indicating a sentiment was held by a strong majority across both groups, to ✓ - indicating a sentiment was held by one or two.



Verbatim Responses

Throughout this report, verbatim responses have been included. Verbatim responses from the qualitative research are labelled throughout.



Statistical Testing

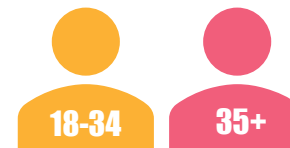
For the quantitative component, significant differences between sub-groups have been tested at the 95% level of confidence and indicated by stars ★ or arrows ▲ ▼ where applicable.



Participant & Methodology Icons

Throughout the report the following icons are used to identify either the participant or approach (i.e. focus group vs survey):

Focus Group Participants



Research Methodology



Focus Groups



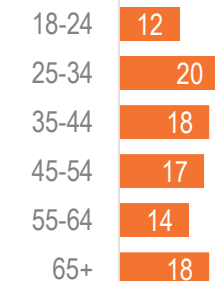
Survey

Survey Sample Profile

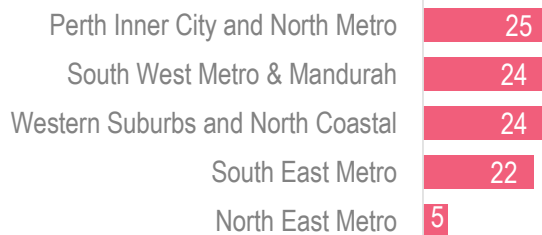
Gender



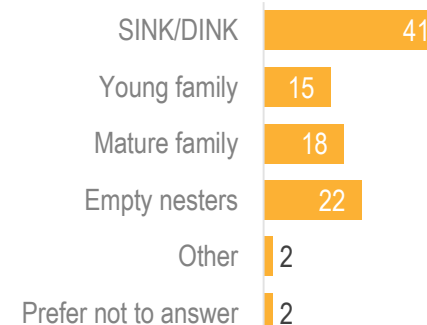
Age Group



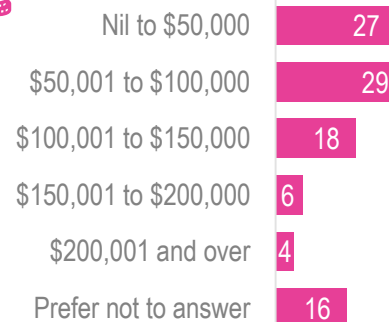
Area



Household Status

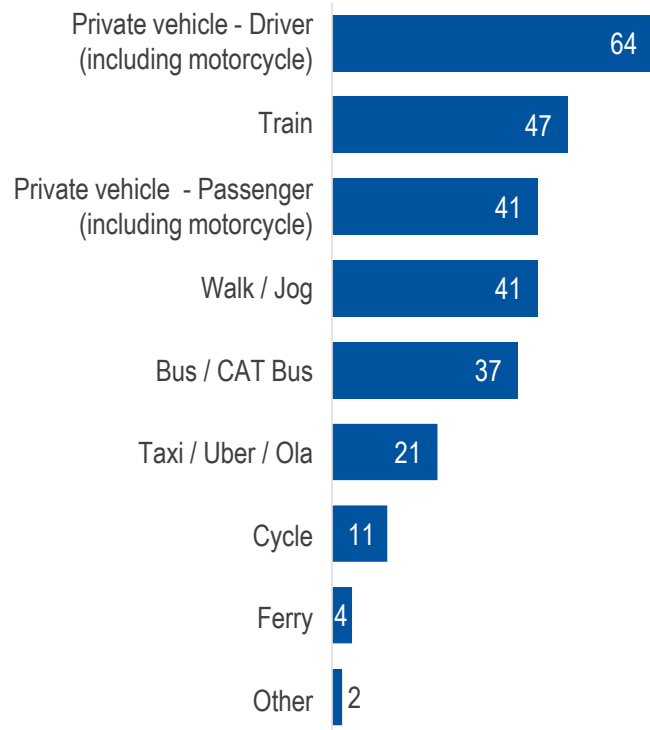


Household Income

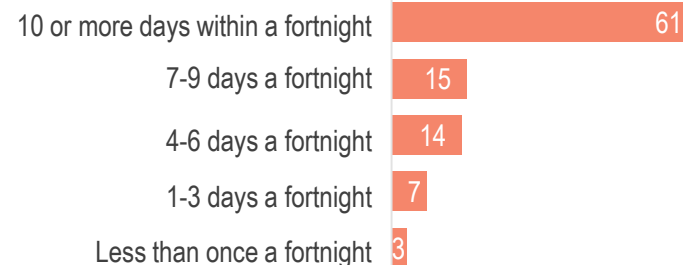


Survey Sample Profile

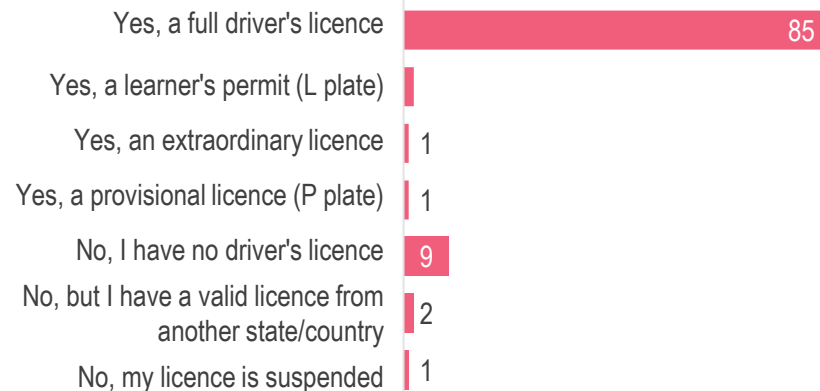
Vehicle Usage



Frequency of Car travel



Vehicle License status





Perceptions & Knowledge of Freight



What are the first things that come to mind when Perth Residents think about 'Freight and Logistics' and what do they know about it?



Not surprisingly, 'trucks' were first mentioned and most commonly associated with freight and logistics.

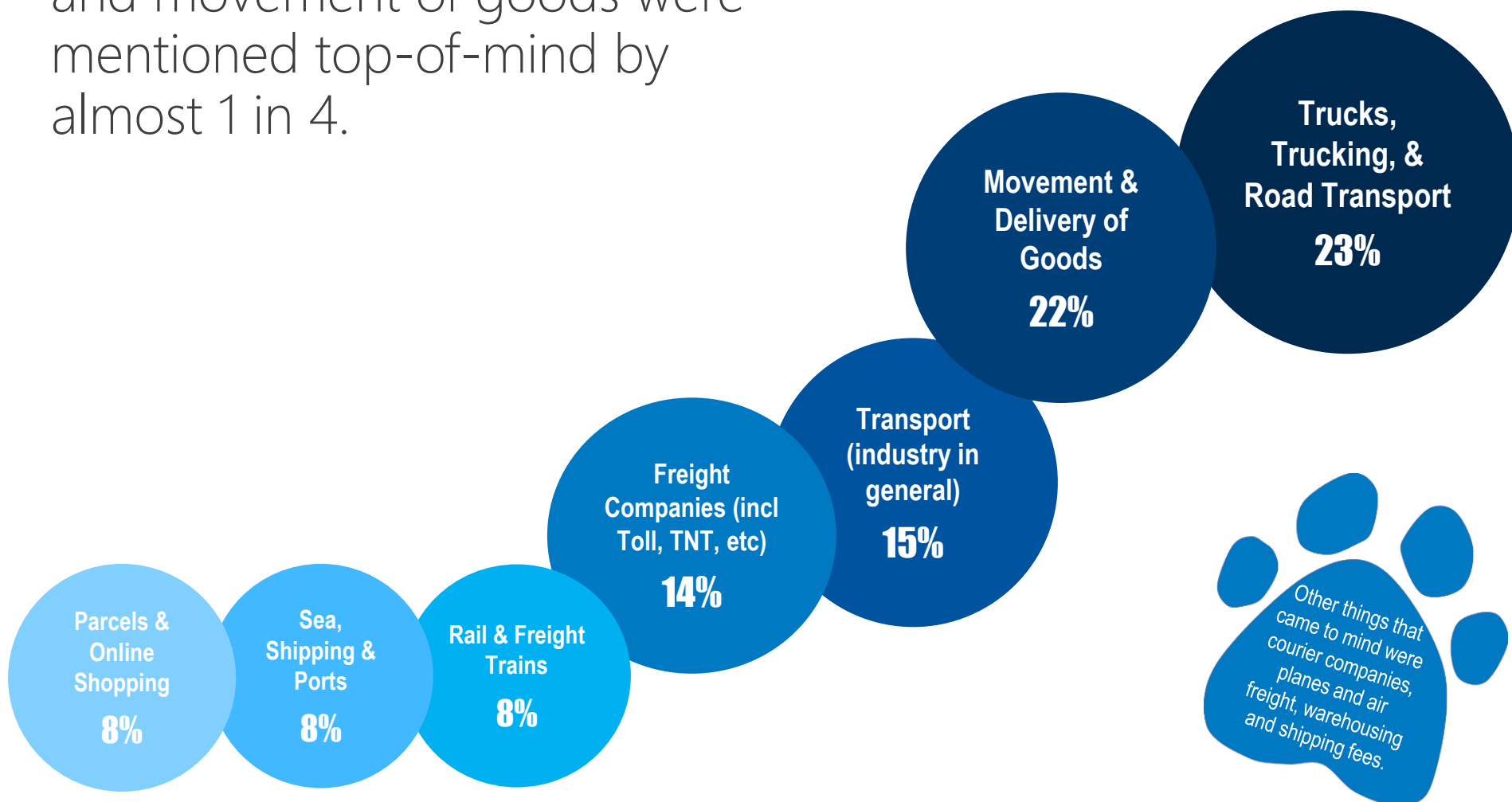
In general, younger demographics think more about the movement and delivery of goods as end consumers – whereas those older are more aware of the complex logistics and supply chain processes that are involved behind the scenes.

"I think of the Coles and Woolies trucks because I see them everywhere!"
- 18-34 year old

"I started thinking about logistics, and this whole supply chain network comes to mind. The complexity of ships, shipments, trains, trucks, and how they interlink that whole thing. And it's not one thing, it's made up of thousands and thousands of things, and I don't fully understand it!"
- 35+ year old



Likewise in the survey, trucks and movement of goods were mentioned top-of-mind by almost 1 in 4.



Overall, Perth residents feel neutral towards freight and logistics due to their perceived lack of engagement with the industry.



While freight is seen as integral it's mostly 'out of sight, out of mind'.

Nonetheless, some common feelings are that rail isn't used enough, while others express a sense of awe at the complexity of freight and logistics processes.

Integral & Important ✓✓✓✓✓

"It's integral! It has such a huge impact on our life." 18-34 year old

"We take for granted what goes on behind the scenes for you to be able to get whatever you want." - 35+ year old

Underutilised Rail ✓✓✓

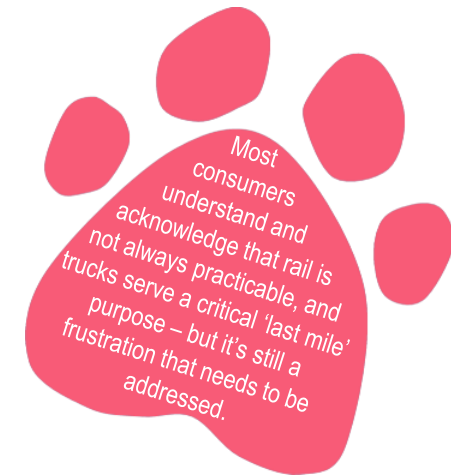
"I see those big Coles and Woolies trucks driving through the city and I think there must be a better way. I think we're missing a chance to use rail and we're just letting everyone drive on the roads." - 35+ year old

"There could be more stuff done by rail, depending on infrastructure, to take pressure off trucks on the road." - 18-34 year old

"Better for the environment to have more trains as opposed to trucks - but then how do you get the goods from the train depot out to where they need to go?" - 18-34 year old

Efficient & Impressive ✓✓

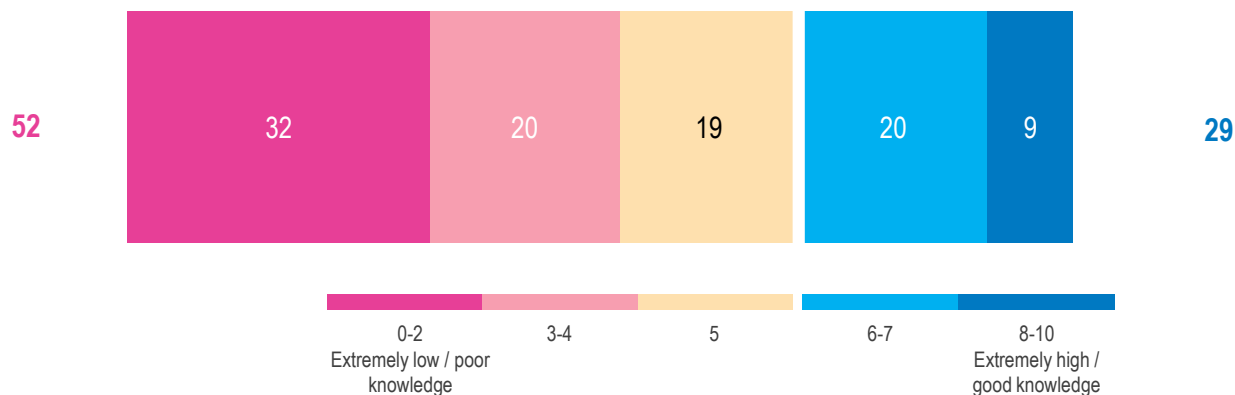
"The way they get things to just lock in together. Things get to you in a timely manner, without too much disruption. There's trucks on the road, but there's not too many half empty trucks on the road, they manage to put different loads together and get them to places." - 35+ year old



More than half of Perth residents admit to having poor or extremely poor knowledge of freight and logistics.

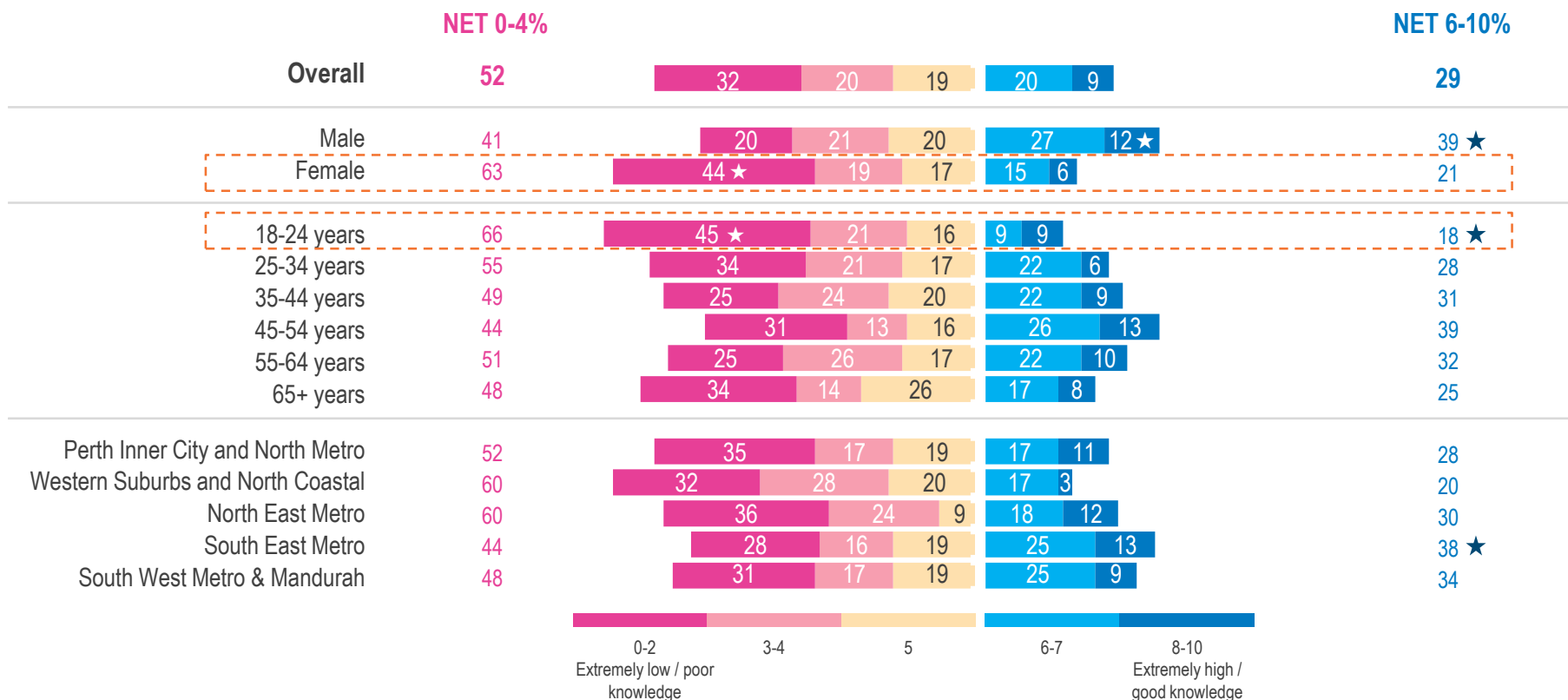
NET 0-4%

NET 6-10%



Knowledge is low across all demographics, but is lowest among females and 18-24 year olds.

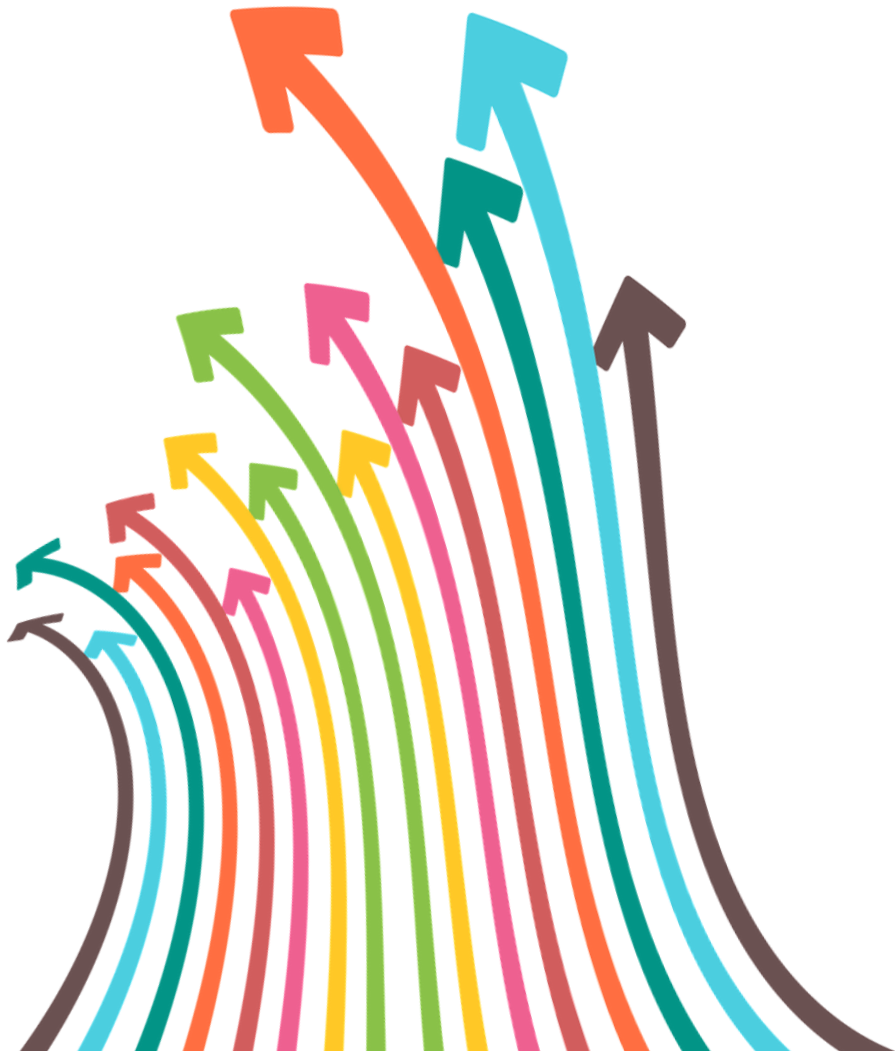
Females are more than twice as likely than males to say they have *extremely poor knowledge*.



Q2. How would you rate your current level of understanding or knowledge of the freight and logistics industry? Base: All Respondents (n=613); Gender: Male (n=299), Female (n=311); Age: 18-24 (n=75), 25-34 (n=126), 35-44 (n=112), 45-54 (n=105), 55-64 (n=86), 65+ (n=109); Area: Perth Inner City and North Metro (n=153), Western Suburbs and North Coastal (n=147), North East Metro (n=32), South East Metro (n=132), South West Metro & Mandurah (n=148).

Most Perth residents' knowledge of freight is based on an 'end consumer' mindset.

Perceptions of freight are often limited to what they see and what impacts them – like trucks stocking supermarkets and online shopping.



Although knowledge of freight and logistics is limited, consumers typically feel they know as much as they need to know about it.

Most feel strongly that the processes behind freight and logistics is 'someone else's job' and unless something goes wrong they are typically happy with their level of knowledge.

"I don't work in that industry, so I have better things to do."
- 18-34 year old

"How much is there for me to know?"
- 18-34 year old

"We don't need to know anymore about it, unless I was employed in the transport industry."
- 18-34 year old

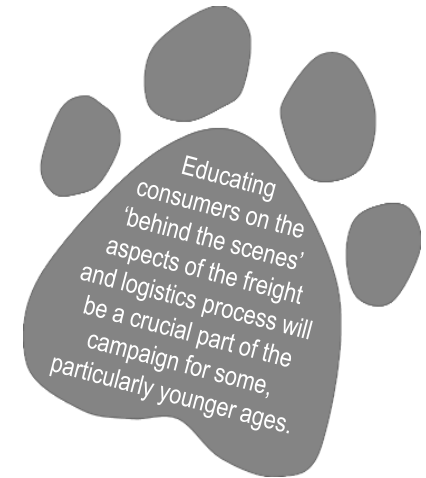
"I don't really have much of an interest about how stuff gets from A to B. I mostly care about where it's come from and when I'll get it, not so much where it's been and how many hands it's touched."
- 18-34 year old

"It is interesting and I'd like to know more, but for most of my life I just put that aside and think it's somebody else's problem."
- 35+ year old

"I put myself in the category of the end consumer - it only really affects me if there's something not on the shelves"
- 18-34 year old

"It's somebody else's problem, until it goes wrong. I've got other things to worry about."
- 35+ year old

However, there is still room to improve public knowledge and educate on the intricacies of freight.




Educating consumers on the 'behind the scenes' aspects of the freight and logistics process will be a crucial part of the campaign for some, particularly younger ages.



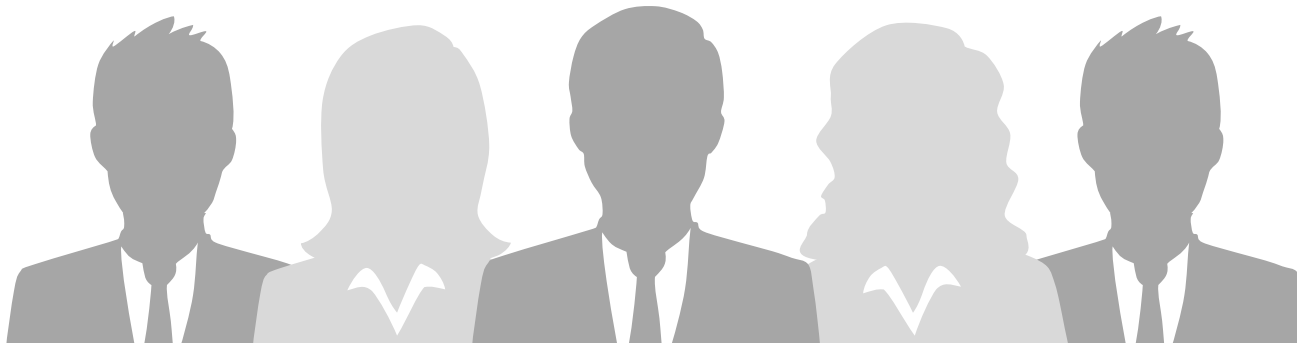
"If people knew more about what was involved between when they press buy on Amazon to the product getting to them, they might be more willing to accept some of the more negative side effects of freight."

- 35+ year old



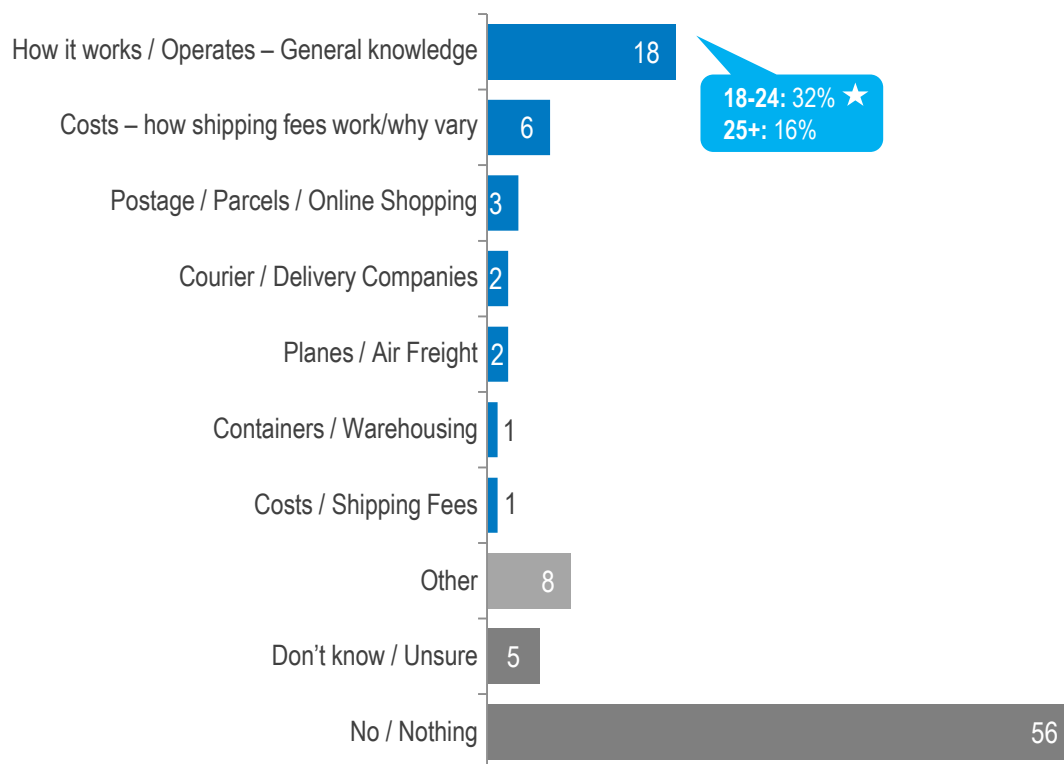
"I hadn't thought about it much until I got recruited to this discussion and looked it up a bit and realised how much it actually does matter. Pretty much all of our stuff comes from elsewhere. It comes in from the sea or the other side of this country... So a lot!"

- 18-34 year old



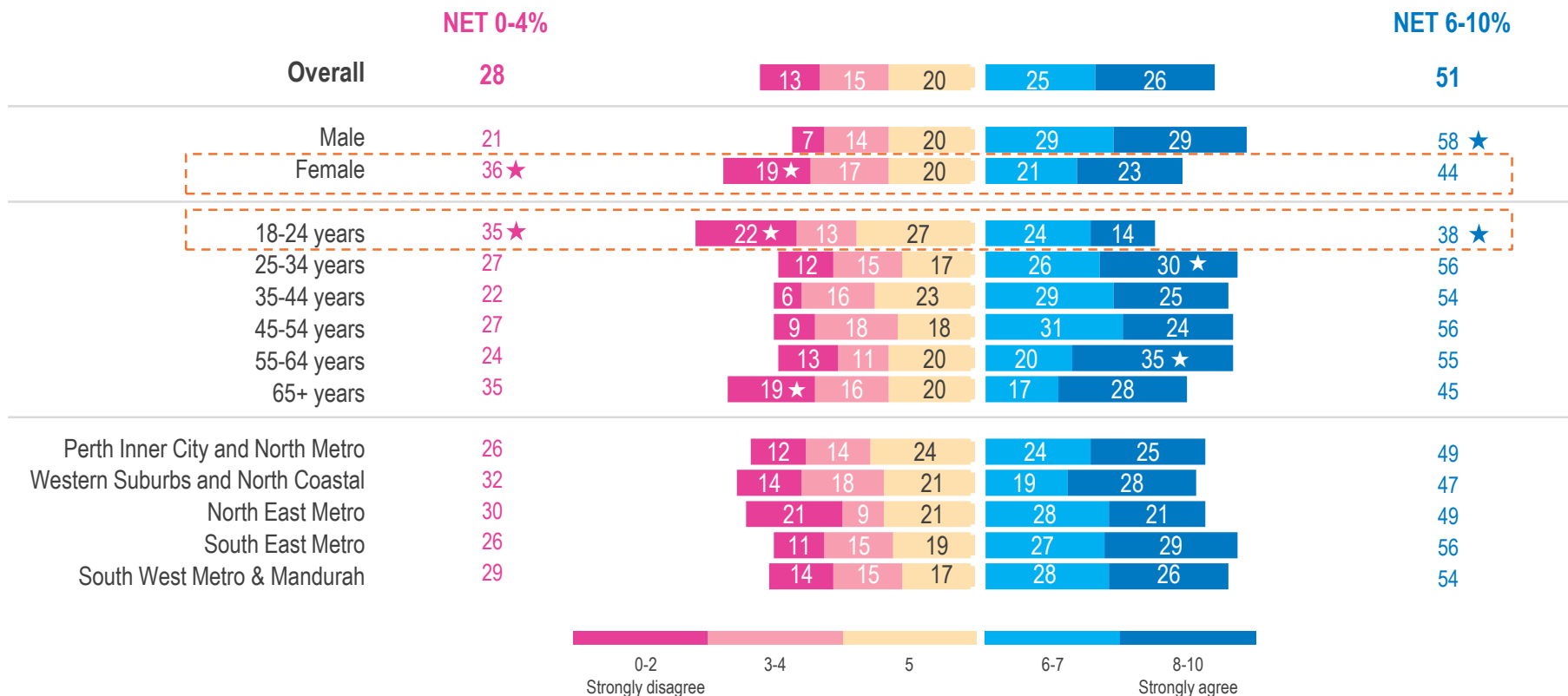
For those who do want to know more, most simply want to know what freight is and how it works.

Positively, those younger (who feel the least informed) are two times more likely than their older counterparts to want to know more general information about the industry and how it works. There is an opportunity to target low-knowledge young people with information about how the industry works.



Moreover, it's those who know the least about freight who say they need to know more...

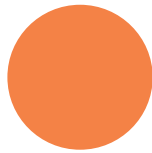
...suggesting they are open to learning more about the industry.



Q4b. I know as much as I need to know about freight and logistics? Base: All Respondents (n=613); Gender: Male (n=299), Female (n=311); Age: 18-24 (n=75), 25-34 (n=126), 35-44 (n=112), 45-54 (n=105), 55-64 (n=86), 65+ (n=109); Area: Perth Inner City and North Metro (n=153), Western Suburbs and North Coastal (n=147), North East Metro (n=32), South East Metro (n=132), South West Metro & Mandurah (n=148).

While most feel they don't need to know more, some want to know more purely out of curiosity.

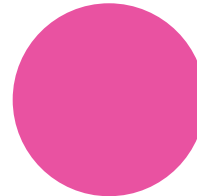
Once again, it's 'behind the scenes' details about the journey of goods that consumers find most interesting – something that could become a core part of the campaign.



Behind the scenes / The journey



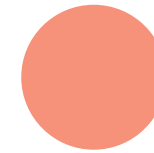
*"I love tracking my stuff and seeing exactly where it is and at what point. But I'd like to know more, when I've looked it up I think its really interesting to know what happens."
- 18-34 year old*



Environmental impact



*"I'd like to know more about the environmental impact, like if it's going by plane is that worse pollution wise than if it was going on a train. So taking that into consideration when you buy something would be interesting."
- 18-34 year old*



Automation / new technology



*"I'd love to know how much of the process is automated now, and what new technology they're using and the job prospects in that."
- 35+ year old*



Consumers' curiosity about freight processes creates an opportunity to 'gamify' freight and create social licence by engaging creatively with the community.



Gamification and interactive engagement could help change the way people think about freight when impacted by it...

...such as driving amongst trucks or waiting for a train to pass.

Consumers suggest messaging on the sides of trains and trucks, such as what's on the vehicle and where it's going, to help them engage more and connect with the freight industry – especially at a young age!



"When my kids were younger, we turned it into a bit of a game. We'd sit there and ask 'where is that train coming from, where's it going, what's it carrying, who's going to be buying the produce. And then turn that into an exploration of the world - it' would be much better if the train had something on the side!"
- 35+ year old

"If you had a hint from message on the train it would help create a story about it. With my kids, we would always create a story about the train, which changes completely what you say and how you feel about it."
- 35+ year old

"It's actually quite fascinating when you see one for the first time, a big freight train going to Kalgoorlie or something, and there's an astonishing amount of stuff that comes on that."
- 18-34 year old

"This parcel is going to X, or inside this truck is 100 moments of joy, or chocolate, or something."
- 18-34 year old



Creative community engagement takes many forms around the world in many industries, which FLCWA could aim to replicate.

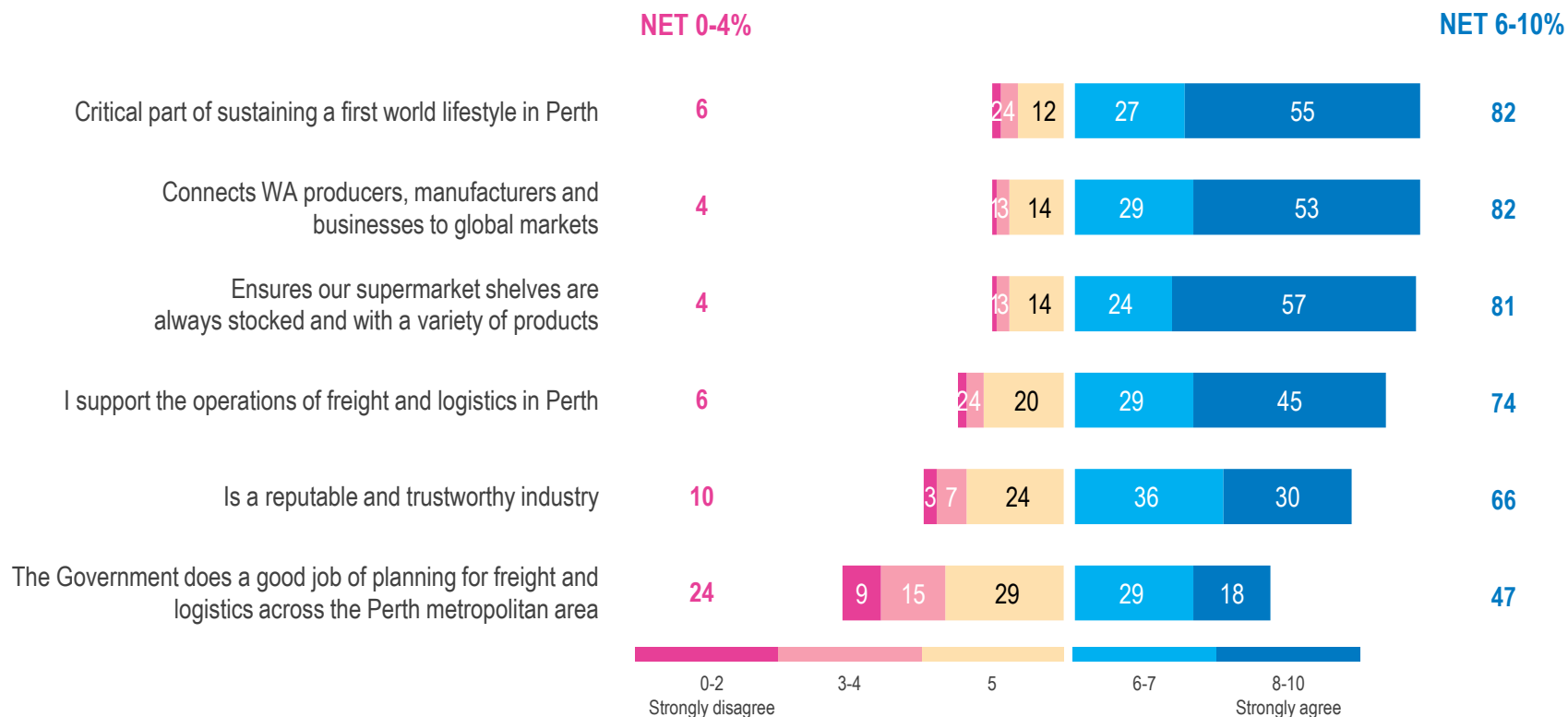




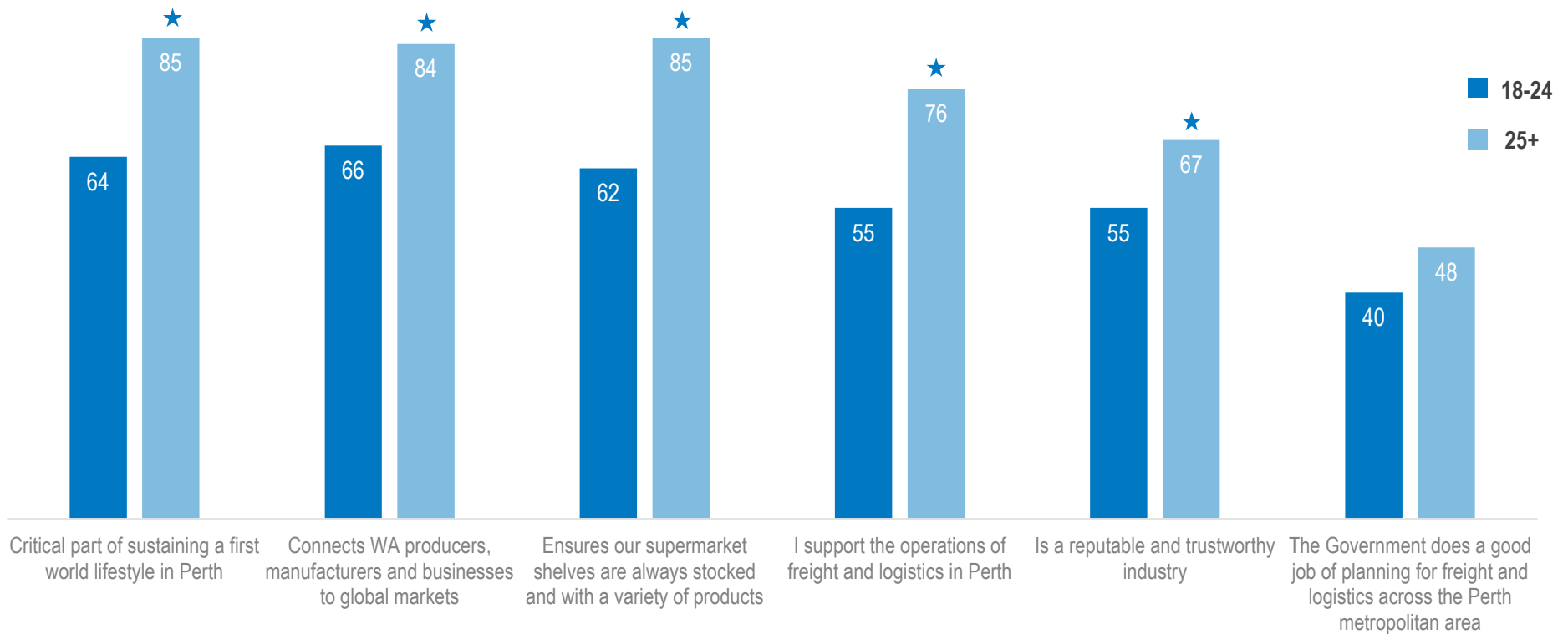
**What is the general sentiment toward the industry
and how do Perth Residents feel the industry
impacts their life?**

Consumers clearly understand the critical role of the freight industry in our lives and 3 in 4 support its operations around Perth.

Moreover, there's room for the government to do a much better job planning for the future of freight in WA – Residents from South West Metro and Mandurah were significantly more likely to disagree the government does a good job (32%) compared to all other areas combined (22%).



Across all statements, the youngest age group showed the lowest agreement.

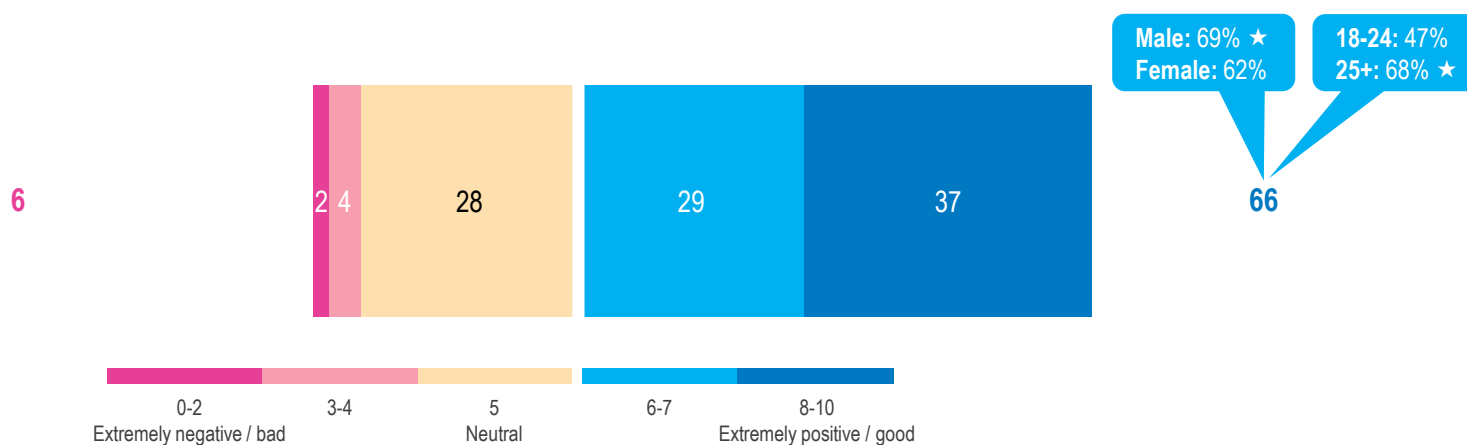


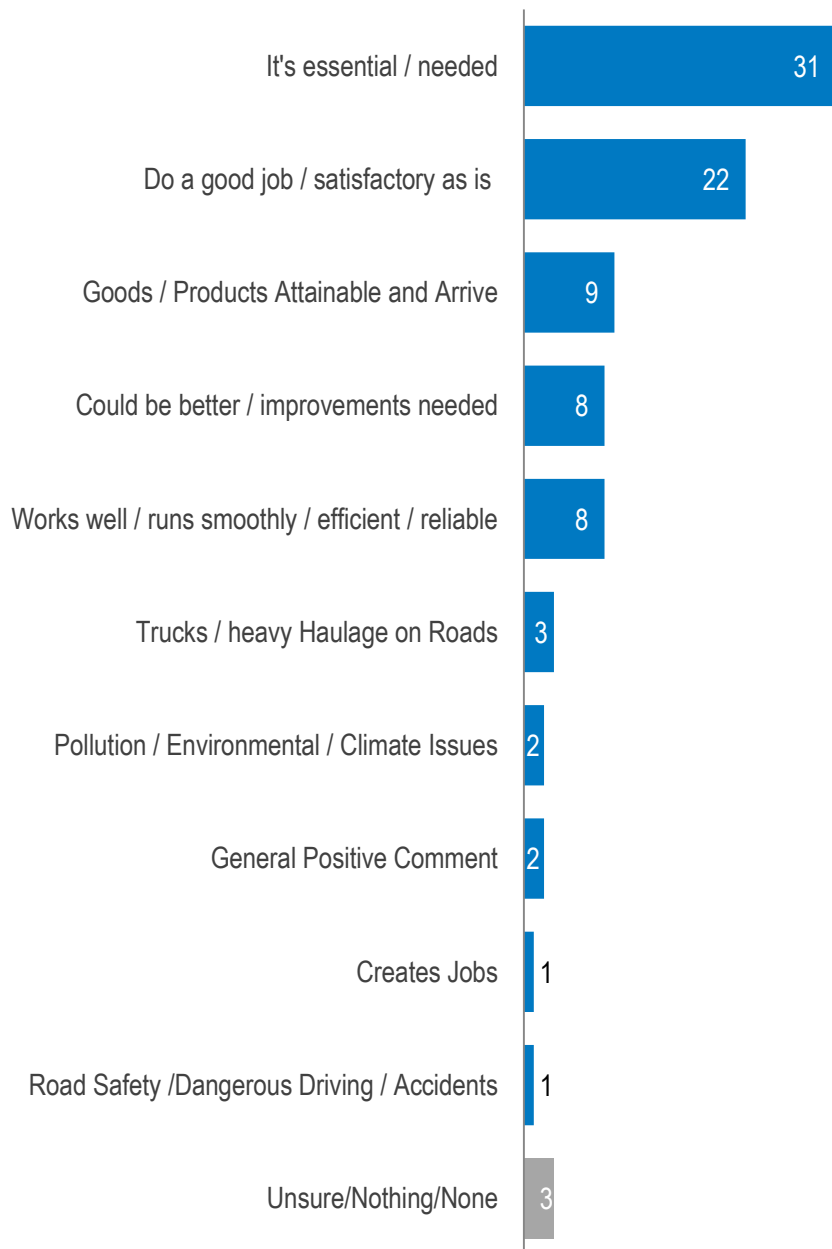
Very few feel negatively towards the freight industry and how it operates around them.

It's also those aged 18-24 and females that feel less positive toward the freight industry – consistent with a lack of knowledge of the industry in general.

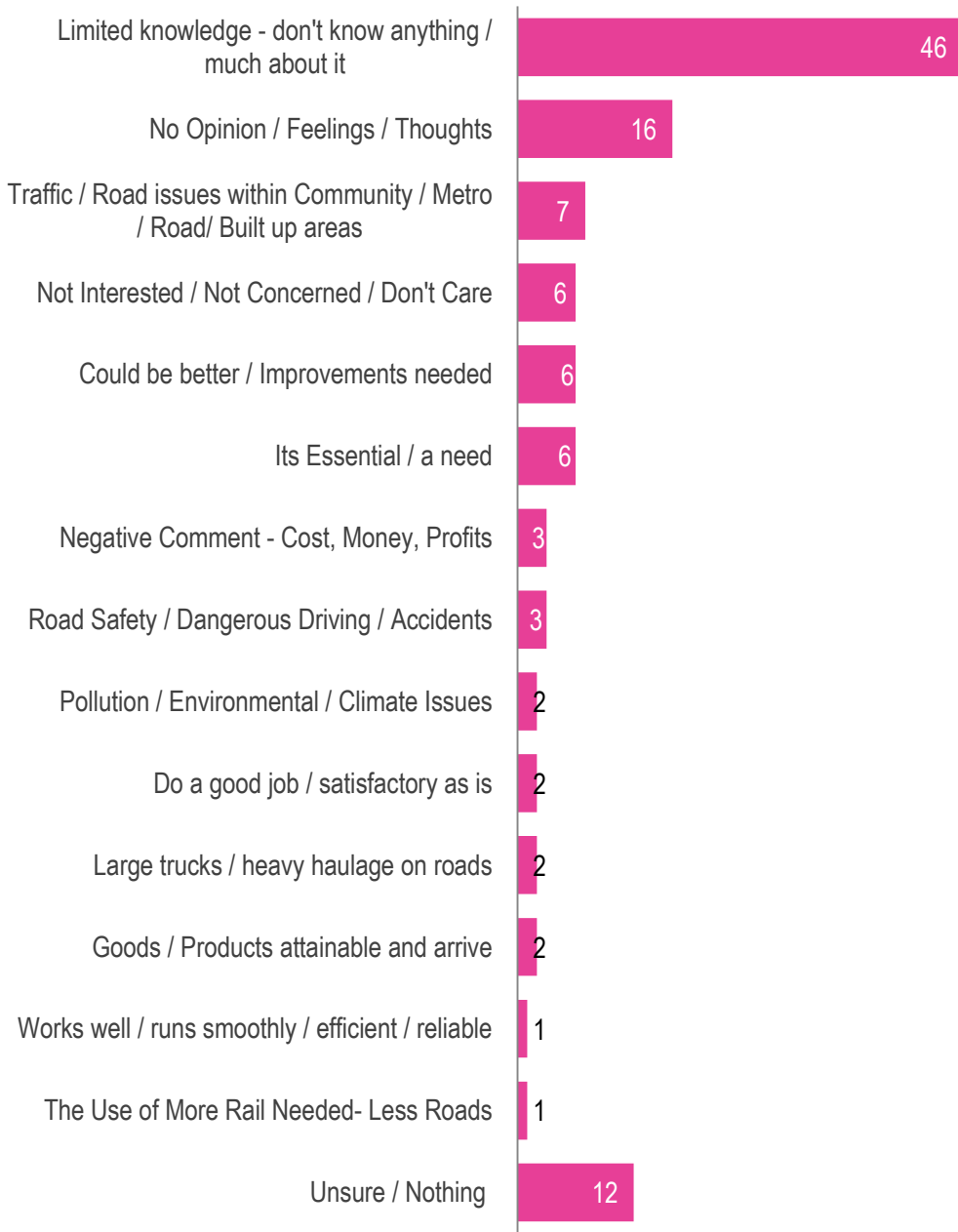
NET 0-4%

NET 6-10%





For those who feel positively towards freight and logistics, most say it's because the industry is essential and does a great job.



Most reasons for feeling negatively towards freight are due to limited knowledge and interest in the industry – increasing these may help boost sentiment.

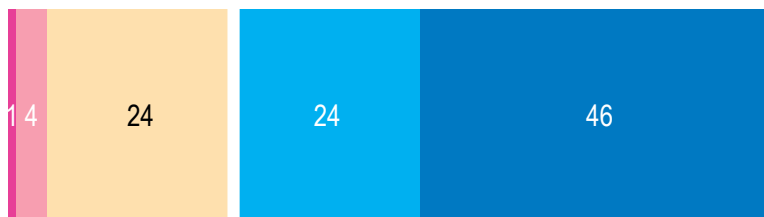
7 in 10 are accepting of the freight industry and its associated activities across Perth.

Those aged 25+ and the South East Metro area are the most accepting.

NET 0-4%

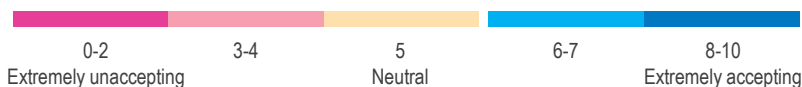
NET 6-10%

5

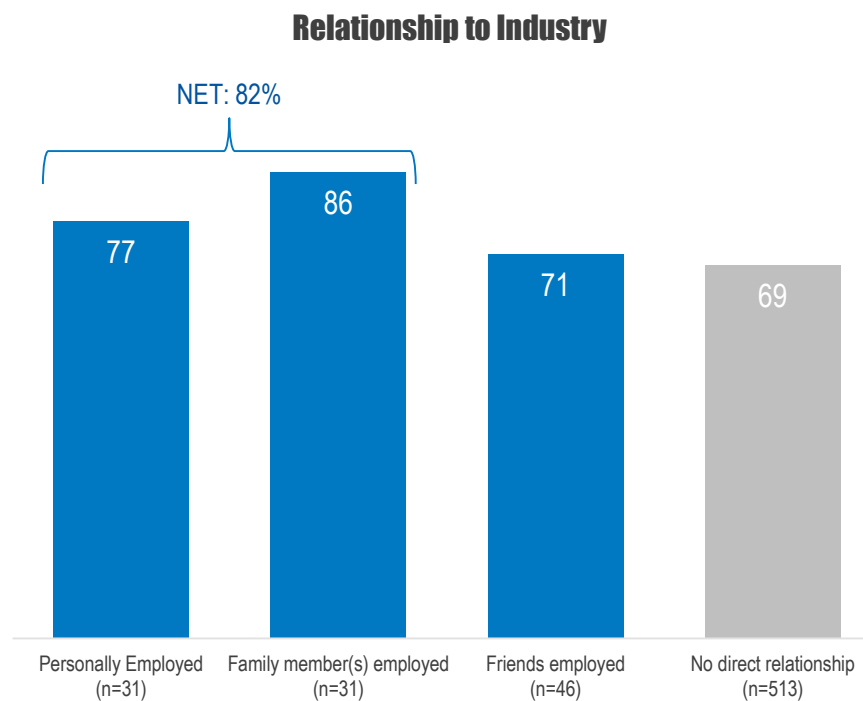
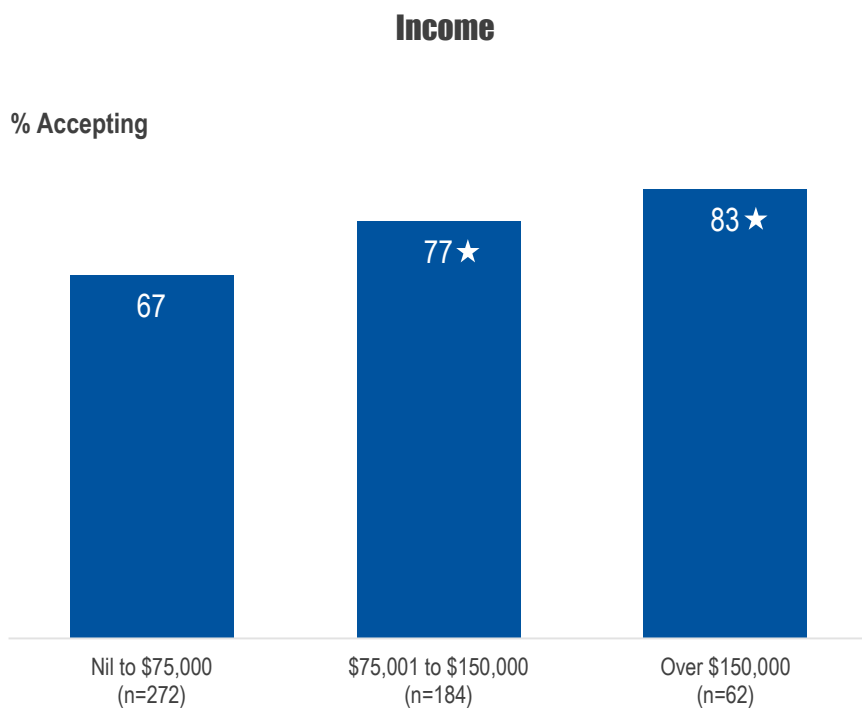


18-24: 52%
25+: 72% ★

South East Metro: 76% ★
All others: 68%



Those with higher incomes and close connections to the industry are also more likely to be more accepting!



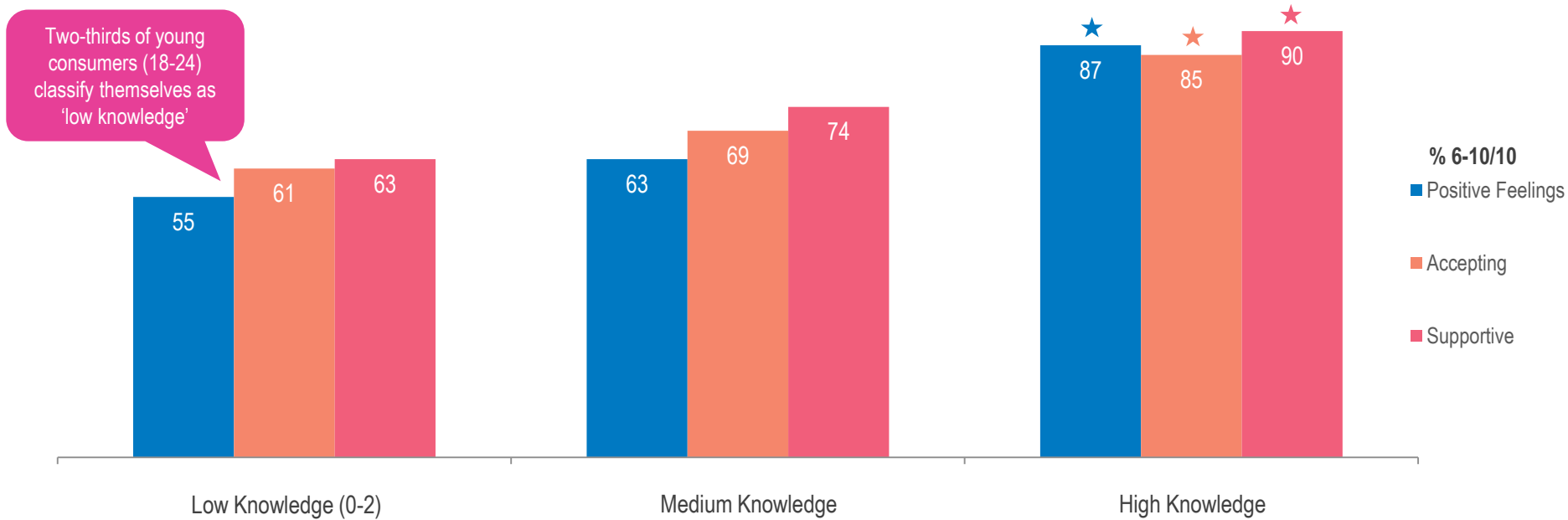
Level of knowledge has a clear impact on support toward the industry.



As consumers' knowledge of freight increases, so too does their acceptance, support, and feelings toward the industry.

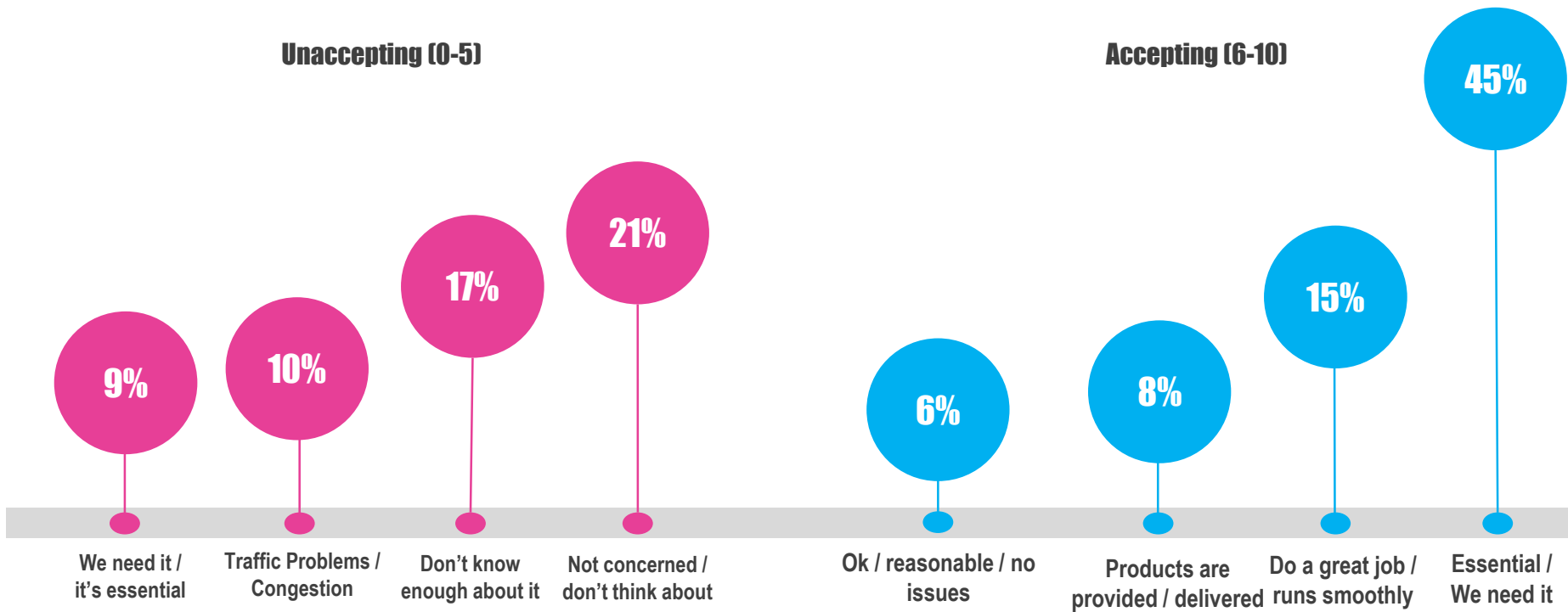


One of the aims of the Social Licence Campaign should be to educate consumers with low knowledge of the industry – namely younger consumers.




The reasons for accepting, or not accepting the freight industry are similar to why consumers feel a certain way about it.

Those who accept it recognise its critical role and think the industry does a great job – those less accepting either don't know much about it or don't think about it. However, even those providing a lower rating still note the importance.



Q8. Why did you rate your acceptance towards freight and logistics that way? Base: Unaccepting 0-5 (n=185); Accepting 6-10 (n=428).

Regardless of how positive consumers feel towards freight, they admit they are likely to feel frustrated and annoyed when impacted by it.

A woman with brown hair is shown from the chest up, looking upwards and holding a large, blue, irregular speech bubble with both hands. The speech bubble contains white text.

"I experience this all the time where I live, there's trucks everywhere and it is frustrating. But I know, we're so remote, we need the containers and what's in them."

- 35+ year old

Most rationalise the impact of freight operations because they understand its importance and feel they can't do anything about it.

Positively, many take personal responsibility for being impacted and think about how they could change their own travel plans to work around freight, while others say they mostly feel curious about the processes going on around them.



Think

Why so many trucks? Where are they going?
 Why can't they be on rail?
 How much traffic is behind me?
 I should have gone another way...
 Could it be done differently, at different times?
 I wonder what's on the train? Where it's coming from and where it's going?
 Can't do anything about it...



Feel

Annoyed
 Frustrated
 Bored
 Fidgety
 Anxious
 Impatient
 Indifferent



Say

"How many more carriages are there?"
 "I wonder where they were going, why there's so many?"
 "Screw this train!"
 "I'm going to be late..."
 "Oh well, can't do anything about it."
 "Can't they put in an overpass or underpass?"

"Can they change the time the trains come through?"
 - 35+ year old

"I'd be thinking about what's on the train and where it's going."
 - 18-34 year old

"Why did I choose to go by Leach Hwy?"
 - 18-34 year old

"Probably can't say what you're thinking if the kids are in the car."
 - 18-34 year old

"Can't help it. There's not much I can do unless I petition for a project or something, so you just kind of accept it."
 - 18-34 year old

Key Benefits & Concerns



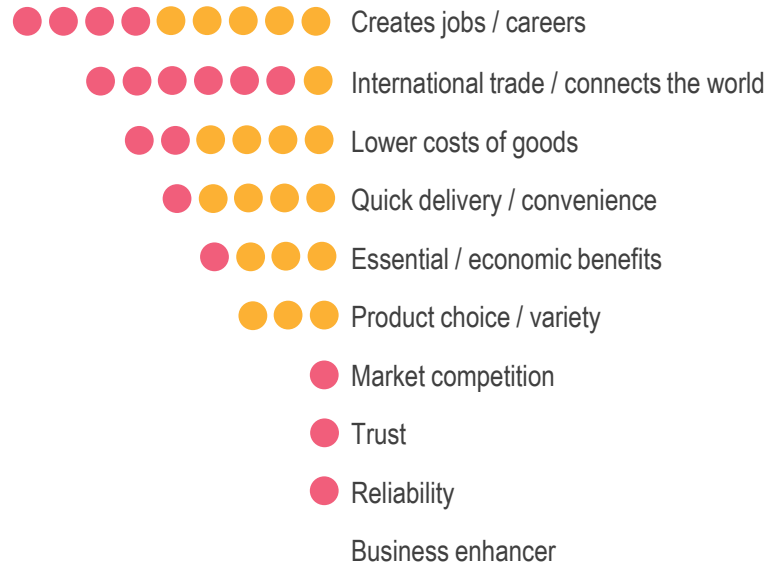
Positively, consumers mention a range of benefits of freight and logistics – and feel we can leverage some of these to bolster social licence.



Key benefits centre around economic benefits like job creation, and the connection of the world through international trade.

Those in the 35+ aged group were more likely to mention international trade and the interconnectedness of the world as key benefits, whereas those younger mentioned lower costs, product choice and convenience.

Benefits of Freight and Logistics



In their own words...



"You don't always think about it, but our entire city functions because of freight. Without it, we don't actually have a functioning economy."
- 18-34 year old

"It's a business enhancer. It creates opportunity to create businesses. You can run a business from Mukinbudin and export to the world."
- 35+ year old

"The ability to get anything you want, from anywhere."
- 18-34 year old

"The whole freight and logistics industry employs a lot of people. It creates a lot of jobs!"
35+ year old

"Being able to have little bits of different countries, some international flavour. [Freight] has brought a real multicultural flavour to our society."
- 35+ year old

"They keep our world ticking."
- 35+ year old

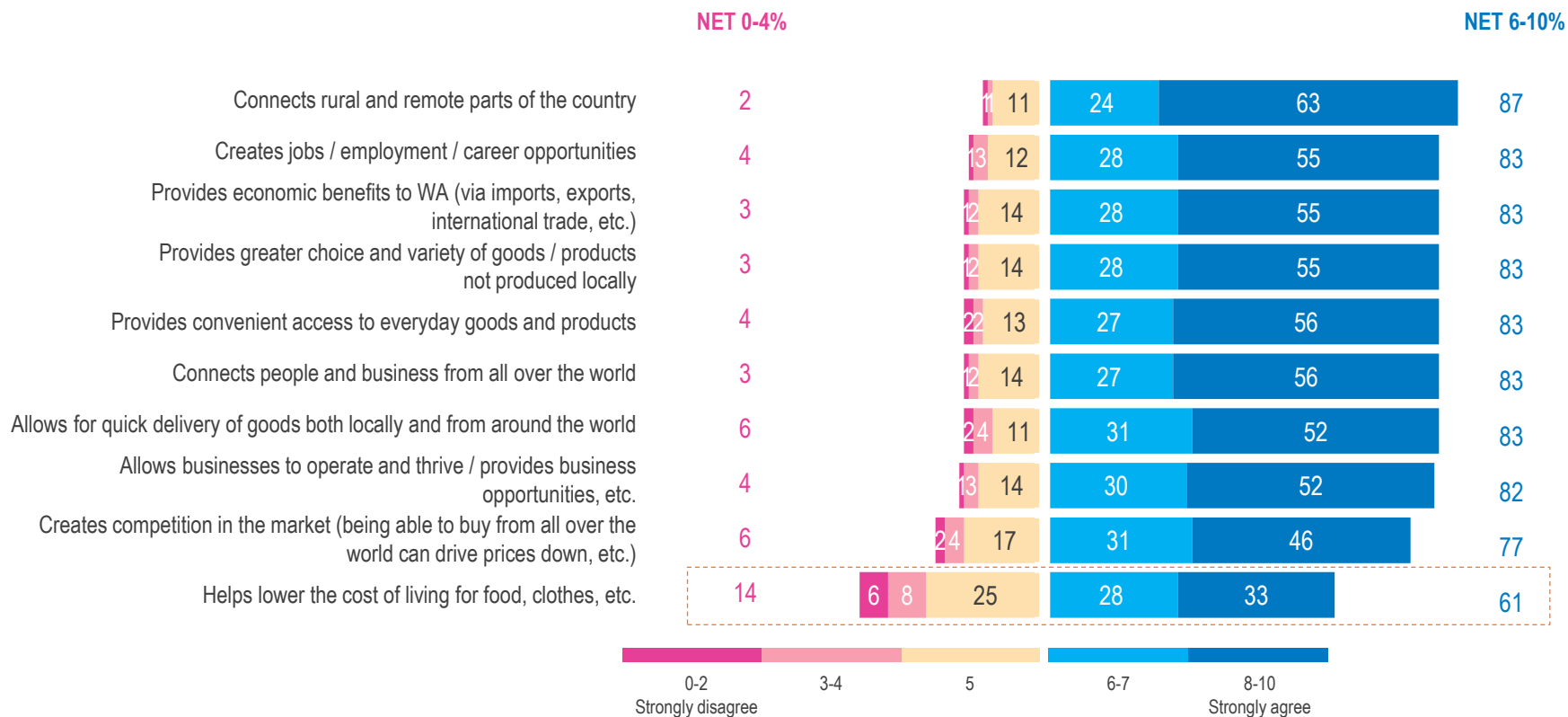
"What's the benefit to me? Yeah jobs are great, but what are you going to do for me?"
- 18-34 year old

"The benefit is to us, the individuals. What's in it for me?"
- 18-34 year old

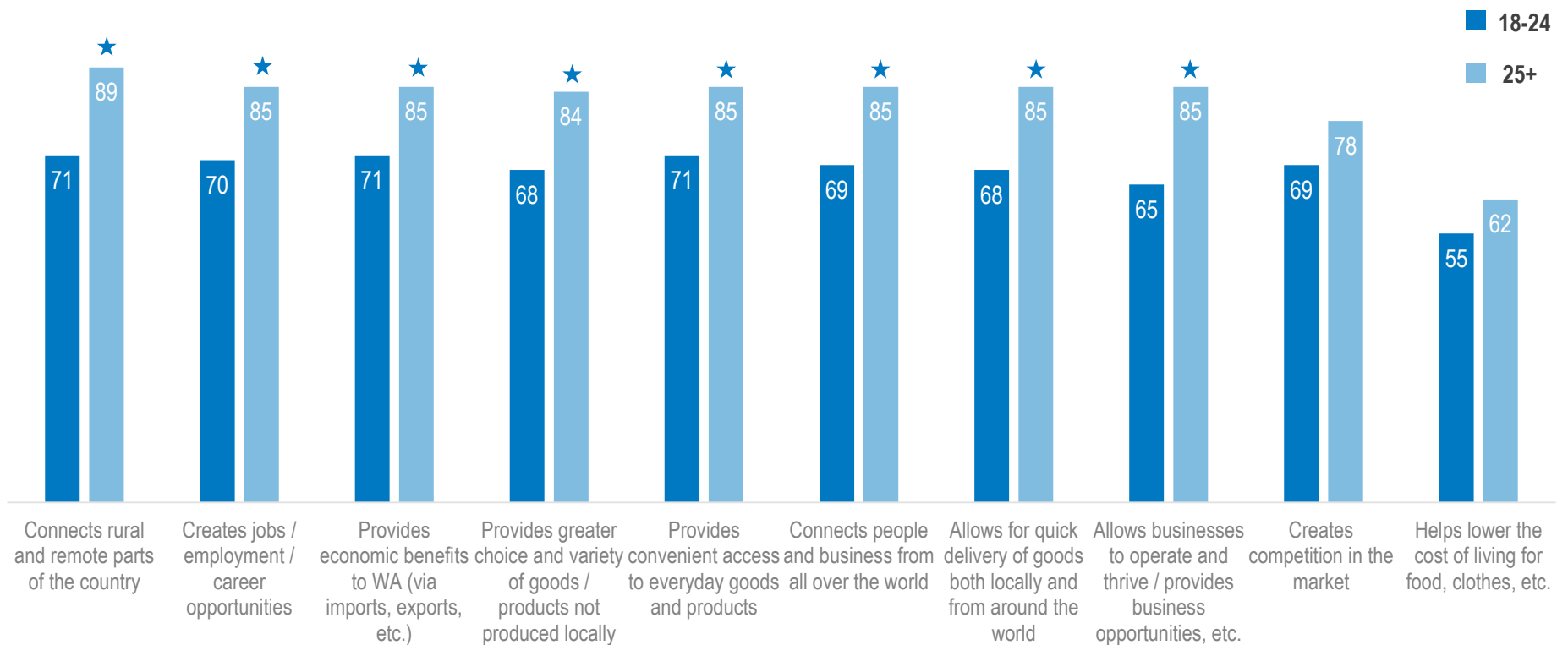


When prompted, the majority recognise the vast benefits afforded by the freight industry, particularly how it connects the country.

There was comparatively low agreement that freight helps to keep prices low on food and everyday living items – however, this is mostly due to a high proportion of neutral ratings (likely a result of lack of awareness).



Once again, agreement on the benefits of freight was lowest amongst the youngest age group of residents.

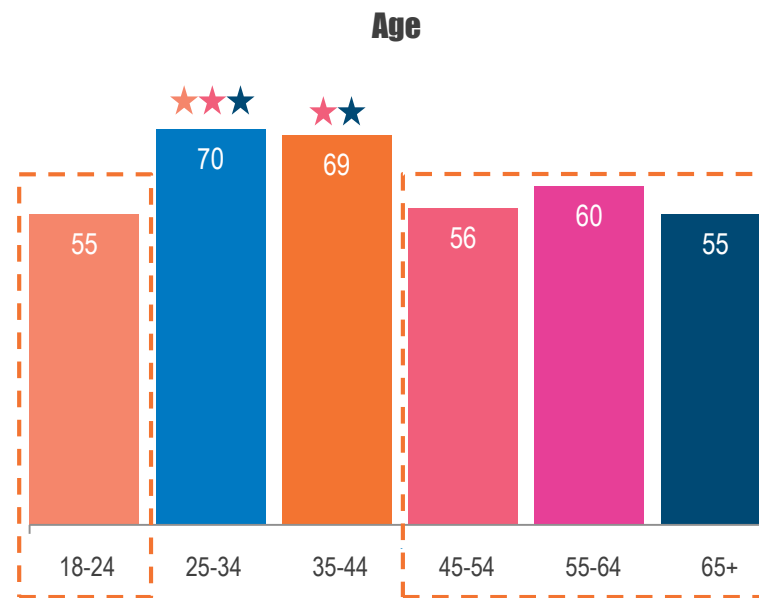
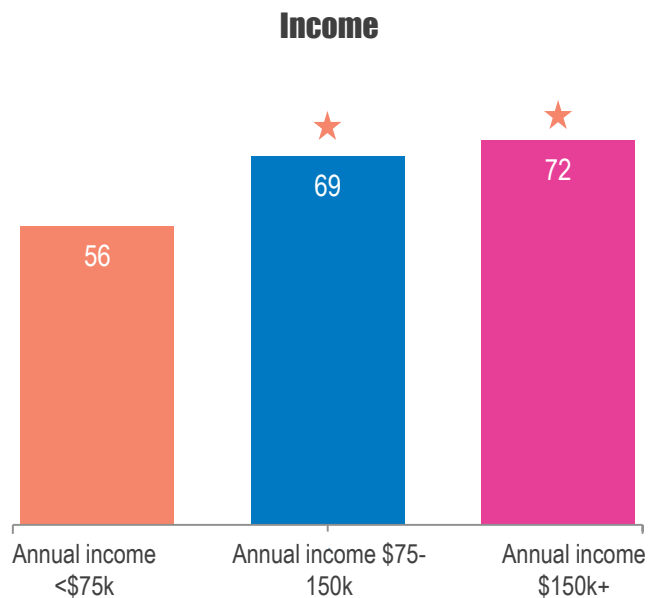


Q10. To what extent do you agree or disagree with the following statements about the freight and logistics industry in Perth? Base: 18-24 year olds (n=75), 25+ (n=538)

Agreement that freight helps keep products affordable is lowest among lower income consumers.

An opportunity therefore exists to target campaign messaging to these segments that highlight how freight contributes to a lower cost of living in WA.

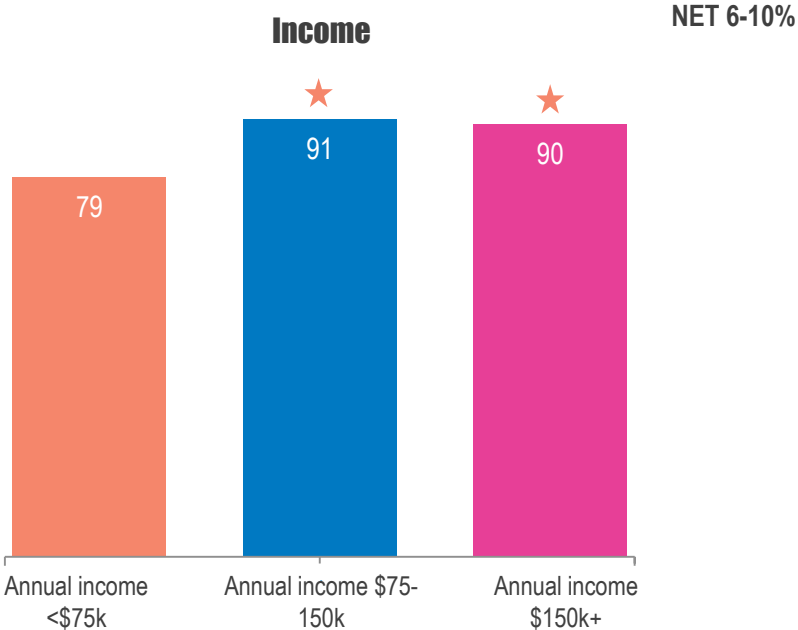
NET 6-10%



Q10b. ...helps lower the cost of living for food, clothes, etc. Base: All respondents (n=613). Income: Low (n=272), Medium (n=184), High (n=62) NOTE, n=93 respondents did not answer income question. Age: 18-24 (n=75), 25-34 (n=126), 35-44 (n=112), 45-54 (n=105), 55-64 (n=86), 65+ (n=109).

Interestingly, agreement that freight provides economic benefits to WA is also significantly lower among those with lower household income.

Due to a significantly lower proportion of 8-10 responses, and significantly higher proportion of neutral responses.



Economic benefits, access to products and the connectivity afforded by freight are the most common benefits of the industry.



When asked directly, almost everyone appreciates the positive impact freight and logistics has on their lives and recognises the importance to WA...

*"It affects you 100% otherwise you can't even go down to the deli to get your \$1 milk."
- 18-34 year old*

*"We depend on it for our food, for utility companies to do what they have to do. We rely on it for everything."
- 35+ year old*

*"We take it for granted until it doesn't happen."
- 35+ year old*

*"It has a huge impact, because everything we consume has to come from somewhere."
- 35+ year old*

*"I used to live rural, we'd have cyclones and everything else and the roads cut - that's when you notice that things don't happen all the time, when you've got nothing in stock anywhere, and you're thinking 'when are the trucks coming'? Now i live metro, you just take that for granted."
- 35+ year old*

*"I notice it a lot more now with online shopping - it's one way that we get things a lot quicker, that we could have never got before, and with different ways of transporting it."
- 18-34 year old*

...and they know how different things would be if the freight and logistics industry wasn't around, or was heavily restricted!

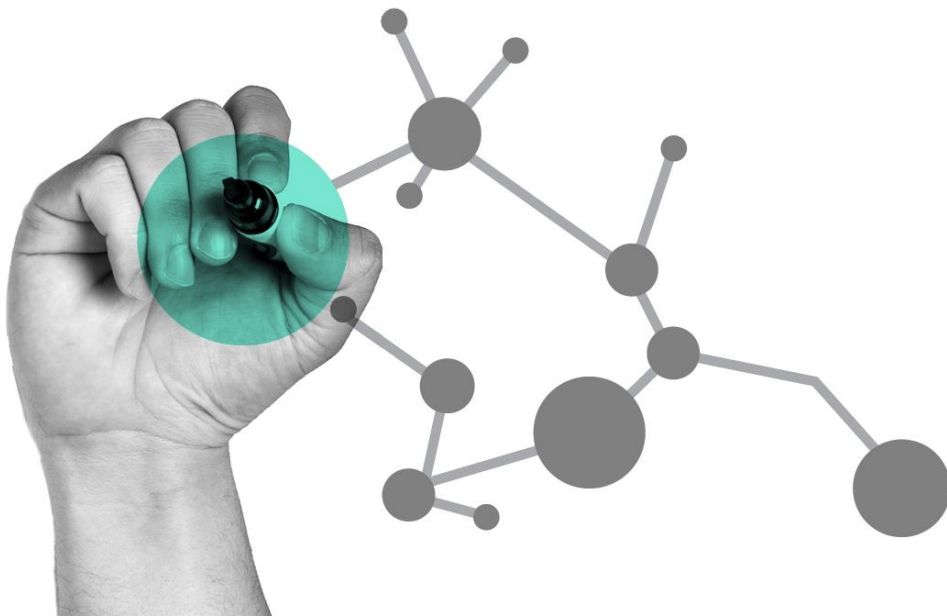


**How has online shopping
influenced their views on
freight?**



Buying online was common across both groups and they generally understood there's a number of complex processes and transport modes involved...

...but most don't think about these processes unless there's an issue or delivery takes longer than expected.



Those who do think about it typically think about the journey the parcel takes and how complex the process is.

Positively, the ability to track parcels has made some consumers more aware of and engaged with the processes behind their purchases.



The parcel's journey ✓✓✓

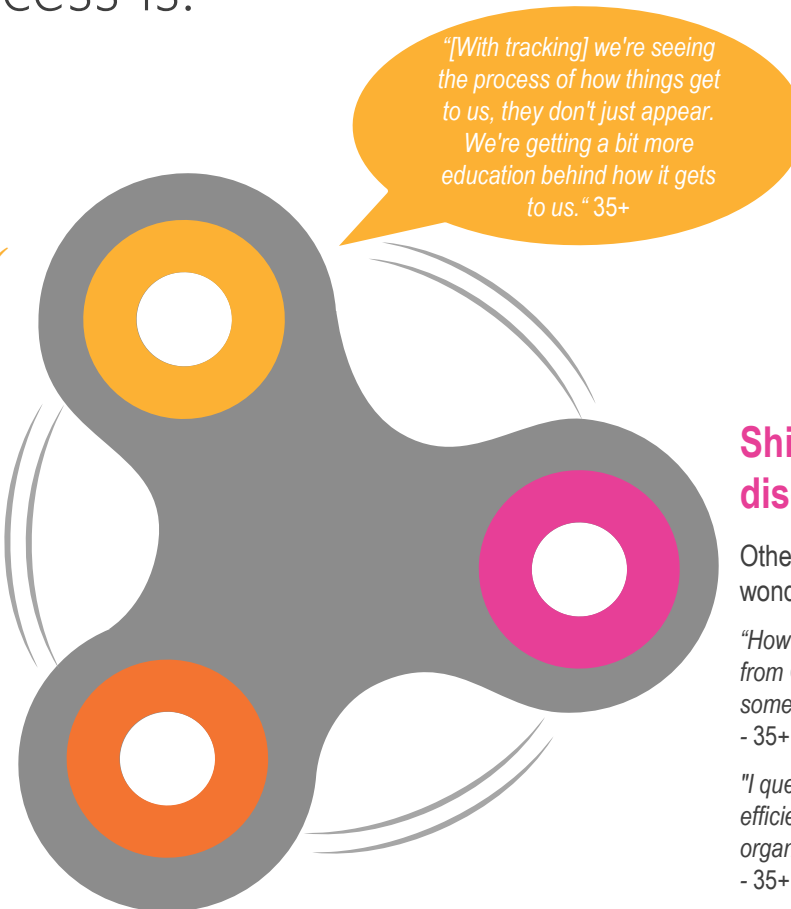
Interested in the journey an online parcel takes, and the steps, locations and transport modes it passes through on the way.

"Occasionally I'll look at the postmarks and I'll think 'Why did you go through Timbuktu, what happened there?'"
- 18-34 year old

The complexity of the process ✓✓

Others think about and appreciate how complex the freight and logistics processes are.

"[I think about] how incredible the whole process is."
- 18-34 year old



"[With tracking] we're seeing the process of how things get to us, they don't just appear. We're getting a bit more education behind how it gets to us." 35+

Shipping times & discrepancies ✓✓✓

Others are curious about shipping times and wonder why there are often discrepancies.

"How come I can order something really cheap from China and get it in 24 hours, and then order something from Sydney and it's 3 days?"
- 35+ year old

"I question why some organisations can be so efficient, and yet the same product from another organisation will take a lot longer."
- 35+ year old

Consumers are aware of the impacts their online shopping has on freight and logistics – but they feel generally positive about them.

More parcels / traffic on roads ✓✓✓✓

"I haven't thought about movement around the city, but I know AusPost has seen an uptake in delivery of actual parcels, rather than letters. Letters have dropped, parcels have spiked because of the internet." 18-34 year old

"There's a lot of those little StarTrack cars, they're didn't used to be and now there's loads of them." 35+ year old

Creates jobs ✓✓✓

"Like the people who pick your shopping at Coles and Woolies, and the truck drivers as well, those weren't jobs before." - 18-34 year old

Opportunities for innovations and agitators ✓✓✓

"It's also created a way to innovate new ways of doing things. You've got companies working on driverless cars, drones, things like that that previously weren't available. It used to just be a postie and that was the only way you could get something from A to B." 18-34 year old

"You've got independents who can say 'I'll deliver this at this price', so it creates competition." 35+ year old

Bad for the economy ✓

"It can be bad for the economy if we're always buying things from overseas." - 18-34 year old

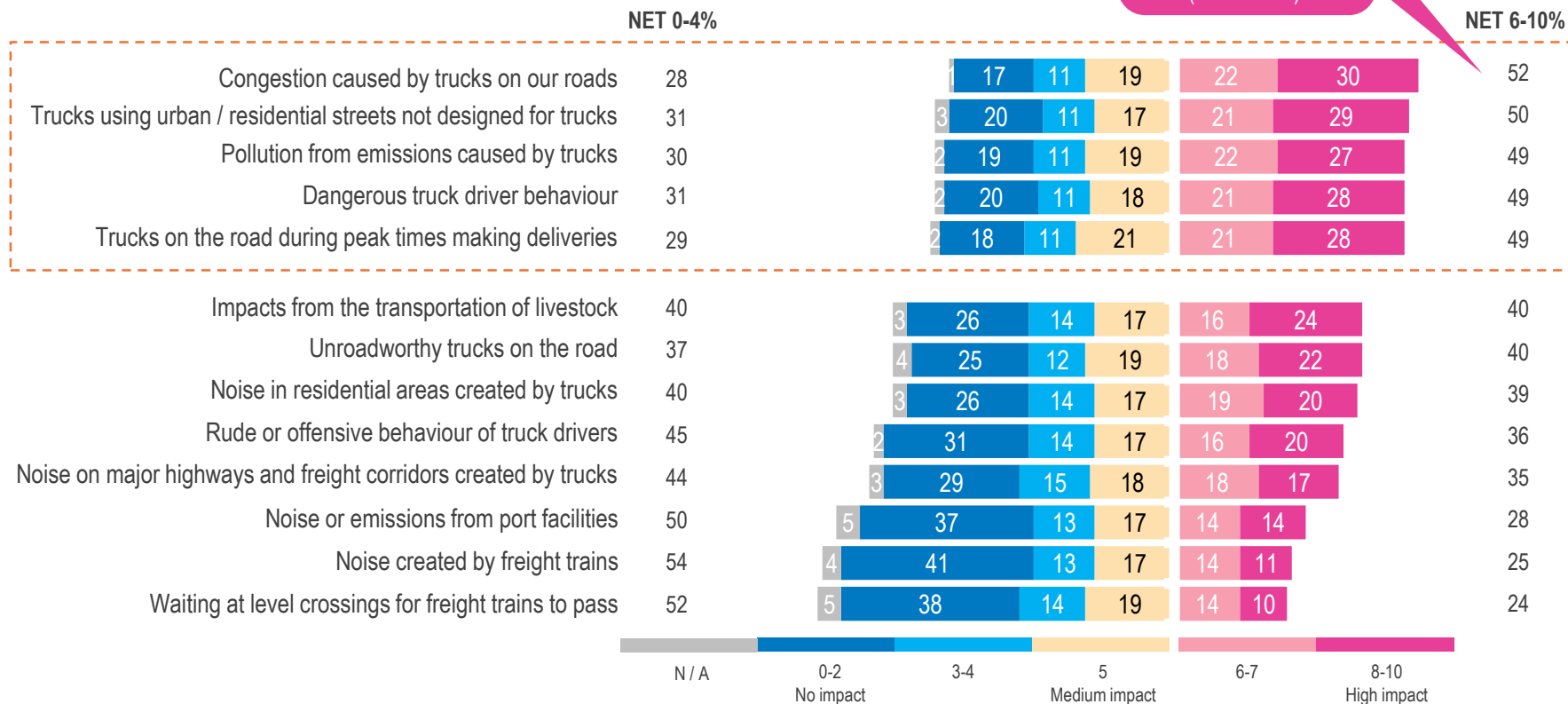
What are the main issues and concerns Perth Residents have around Freight and Logistics?



As end consumers, residents feel most impacted by the presence of trucks on the road causing congestion and pollution.

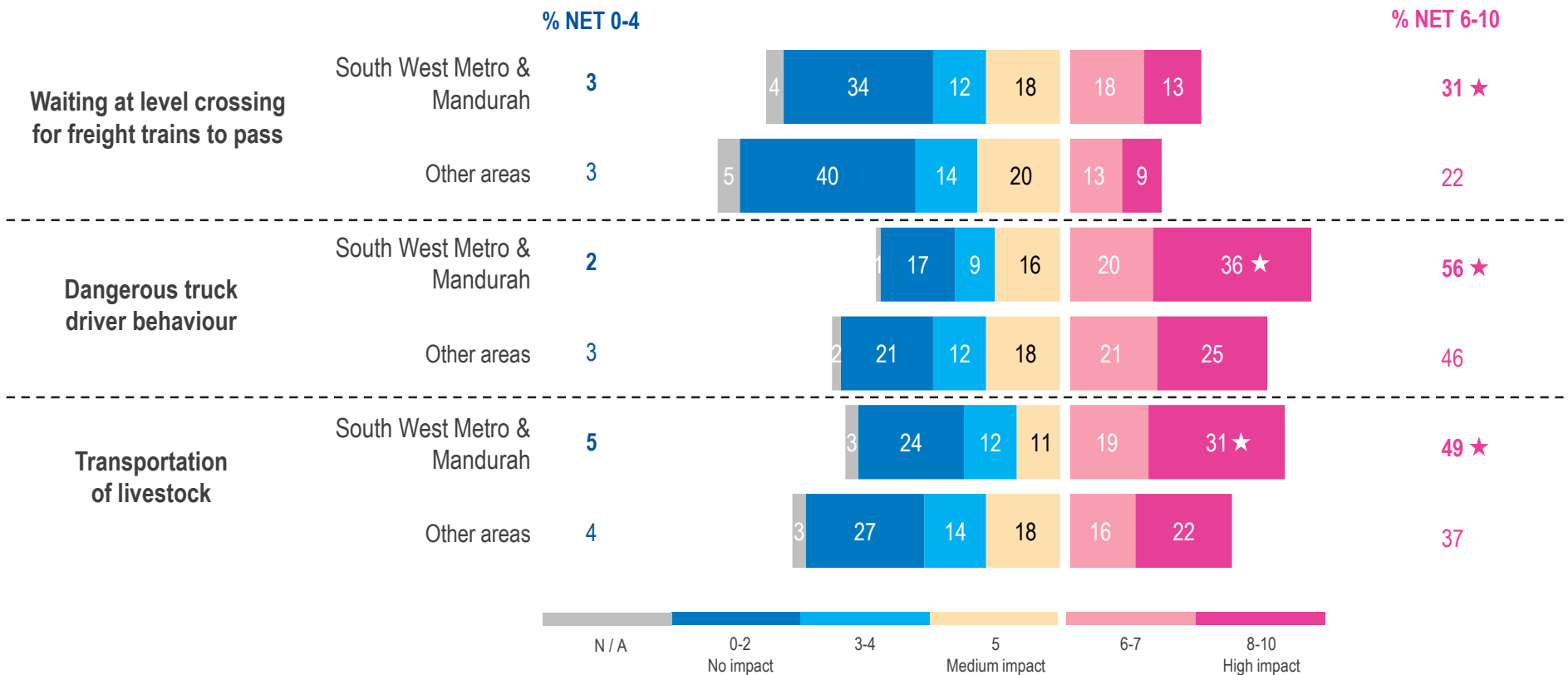
Far fewer are impacted by noise of freight activities or activities related to rail.

Higher among those who drive 6+ days a fortnight compared to those driving less often (54%▲36%).



Some of these issues have a greater impact depending on where residents live.

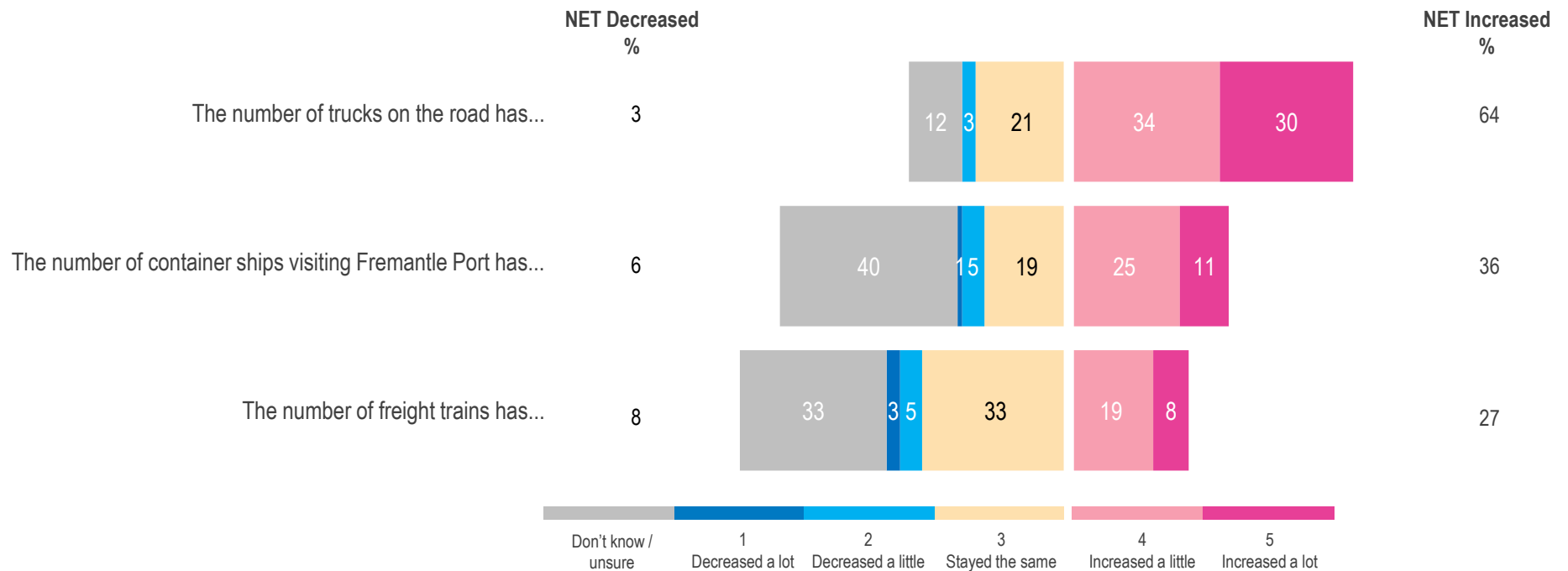
In particular, residents in the South West Metro & Mandurah area reported significantly higher impact from level crossing, dangerous truck driver behaviour, and the transportation of livestock.



Q9. We want to know if you experience any of these issues and if so, how much they impact you. Base: South West Metro & Mandurah (n=148), Other areas (n=465).

Most feel the amount of trucks on the road has increased in the last 5 years.

But very few know whether the amount of ships and freight trains has changed – because this isn't something they typically see or that impacts them.

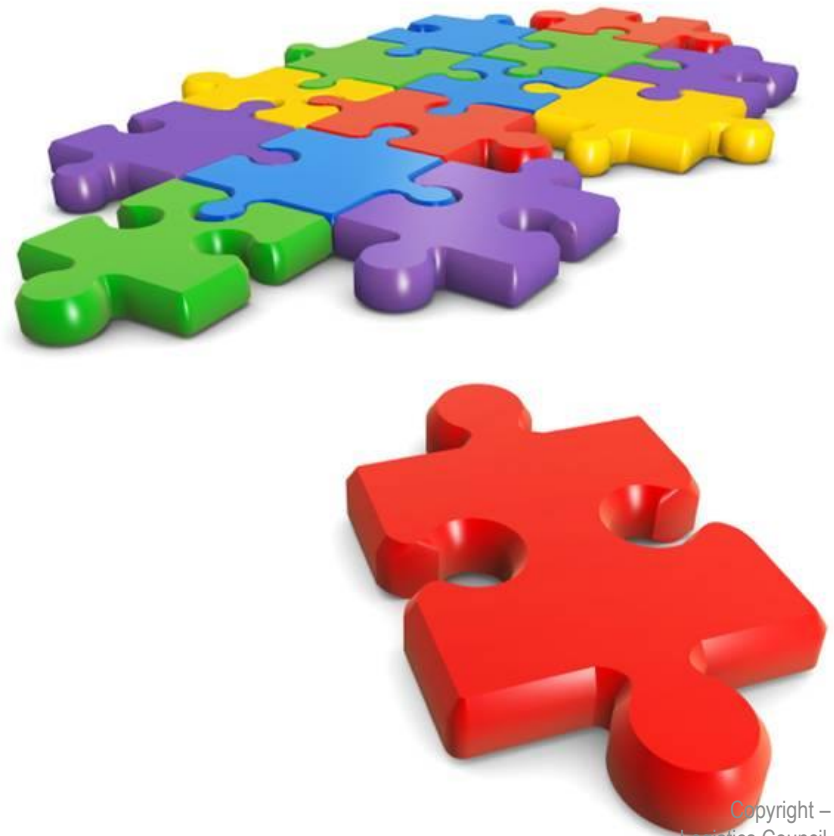


A number of concerns about freight operations around the city emerged top-of-mind for both groups.



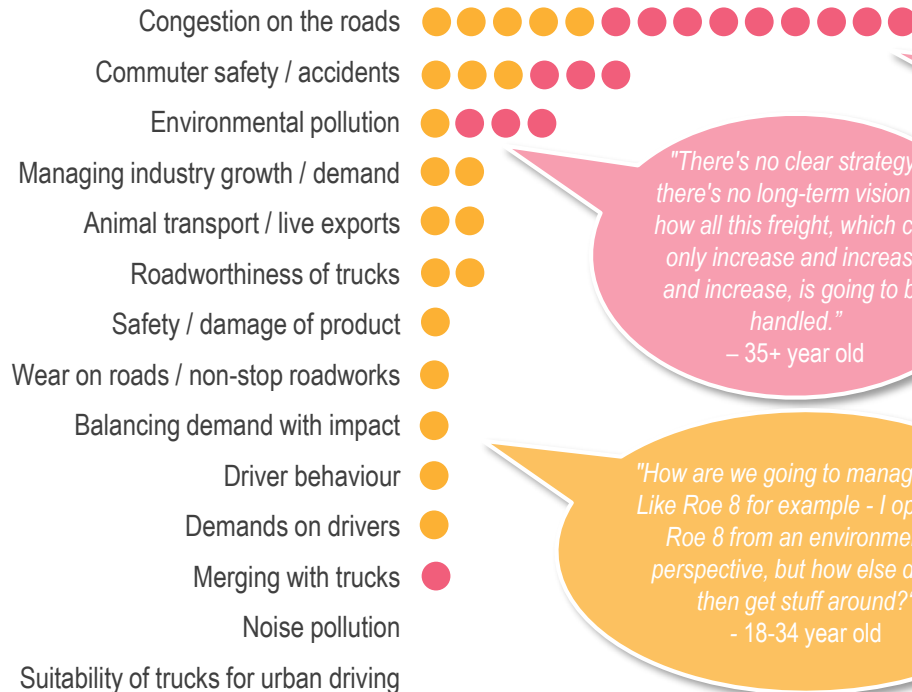
Following some unprompted discussion, each group was given stickers to choose their two most important concerns of the freight and logistics industry.

Perth residents identified a range of issues – but for focus group participants, congestion caused by trucks was by far their biggest concern.



Younger demographics identified a much broader range of concerns - from concerns regarding conditions for drivers to the security of products they order.

Concerns about freight and logistics



Consumers admit their concerns are limited to road freight because that's what they see and what impacts them - so this is what a campaign should focus on.



"There's no clear strategy, there's no long-term vision of how all this freight, which can only increase and increase and increase, is going to be handled."
- 35+ year old

"It reduces quality of life if you've gotta take 45 minutes to get somewhere that should just take 10 because there's so many trucks everywhere."
- 35+ year old

"How are we going to manage this? Like Roe 8 for example - I opposed Roe 8 from an environmental perspective, but how else do we then get stuff around?"
- 18-34 year old



Despite not of greatest concern top of mind, Perth residents are conscious of the welfare of truck drivers and see this as a key issue to address.

Residents recognise that ruthless schedules take a toll on truck drivers and can lead to a number of behavioural issues that the public often associate negatively with the industry, such as dangerous driving and stimulant drug use.

Pressure to Meet Deadlines

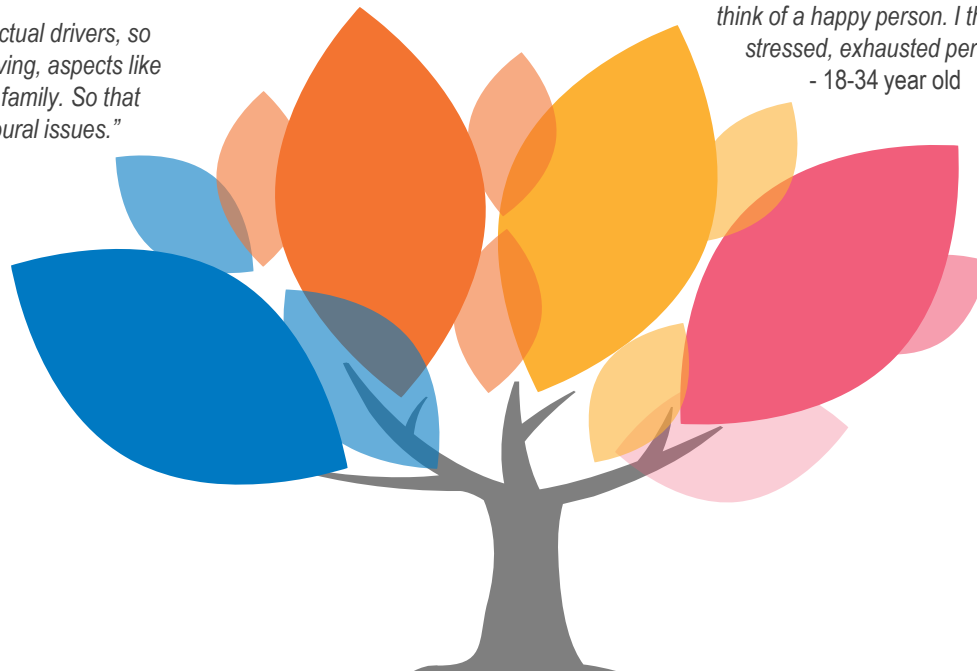
"The pressure and demands of actual drivers, so time constraints, long distance driving, aspects like mental health, being away from family. So that creates a whole lot of behavioural issues."
- 18-34 year old

Time Away from Family

Stimulant Drug Use

"When I think of a truck driver, I don't think of a happy person. I think of a stressed, exhausted person."
- 18-34 year old

Mental Health



Prioritising Concerns



**What are the externalities of
greatest concern among
consumers...**

**...and which ones should be
targeted by the campaign for
maximum reach and
effectiveness?**



Trade-off Analysis

Trade-off analysis allows us to understand what's most important to consumers and helps rigorously and empirically decide which concerns a social licence should focus on to reach the highest number of consumers.

23 attributes were presented in 14 separate bundles of 5 attributes. A balanced design ensured that each respondent saw each attribute 3 times.

- The impact of trucks on traffic and congestion on our roads
- The safety of commuters (drivers and pedestrians) while sharing the roads with trucks
- Noise in residential areas created by heavy vehicles
- Noise created by freight trains
- Noise on major highways and freight corridors (Roe/Leach Highway) created by trucks
- Noise or emissions from port facilities
- Environmental pollution caused by trucks (carbon emissions, diesel exhaust, disposal of tyres, etc.)
- Wear and tear on roads from trucks (requiring more frequent roadworks)
- High pressure and demands on truck drivers (leading to mental health concerns, fatigue, etc.)
- Drug use among truck drivers
- Dangerous truck driver behaviour
- Rude or offensive behaviour of truck drivers
- Roadworthiness of trucks (mechanical quality, safety standards, maintenance, etc.)
- Cleanliness of trucks (dirty, eyesore, etc.)
- Transportation of livestock (treatment of animals on trucks, smell, etc.)
- Trucks on the road during peak times making deliveries
- How your packages / parcels are treated while being transported (being damaged by a courier, etc.)
- Merging with trucks on freeways or highways
- The time spent waiting for freight trains to pass at level crossings
- Crashes and accidents caused by trucks
- Trucks using urban / residential streets not designed for trucks
- How long it takes to receive the goods I've ordered
- The growth in freight movements due to the increasing community demand for goods

Understanding the Analysis

Two main outputs from the trade-off analysis were included in this report:



Importance Scores indicate the relative importance of each issue to the overall sample.

They are ratio-scaled, which means a score of 200 means the issue is twice as important as an issue with a score of 100. The average score among all issues is 100, so issues with a score about this are above average in importance.

The issues have been ranked from most important to least important, and divided into four tiers (quartiles). Issues in the top tier are ranked as the top 25% of issues according to the overall sample.



First Choice values indicate the percentage of respondents that rated the issue as their most important issue overall.

For example, if the first choice value for an issue such as *'The transportation of livestock'* is 9%, it means that 9% of respondents rated that issue as their most important issue overall – and thus for that 9% it was rated higher than the 22 other issues measured.



Types of Choice Drivers Tested

A broad range of concerns were identified as potentially important and tested in this analysis. These were compiled from a range of sources, including previous research literature and the focus groups.

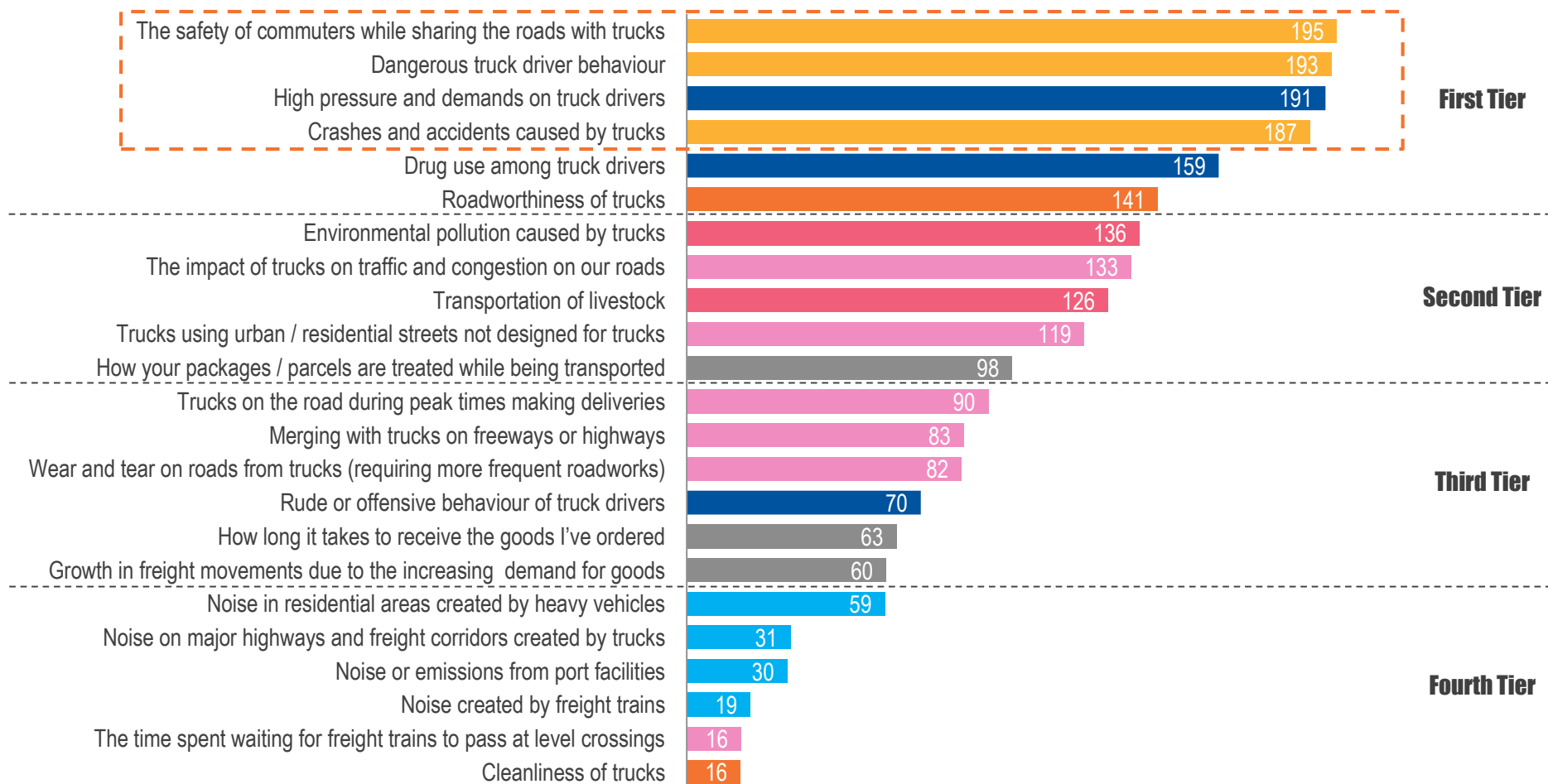


How important are each of the issues to the Perth community?



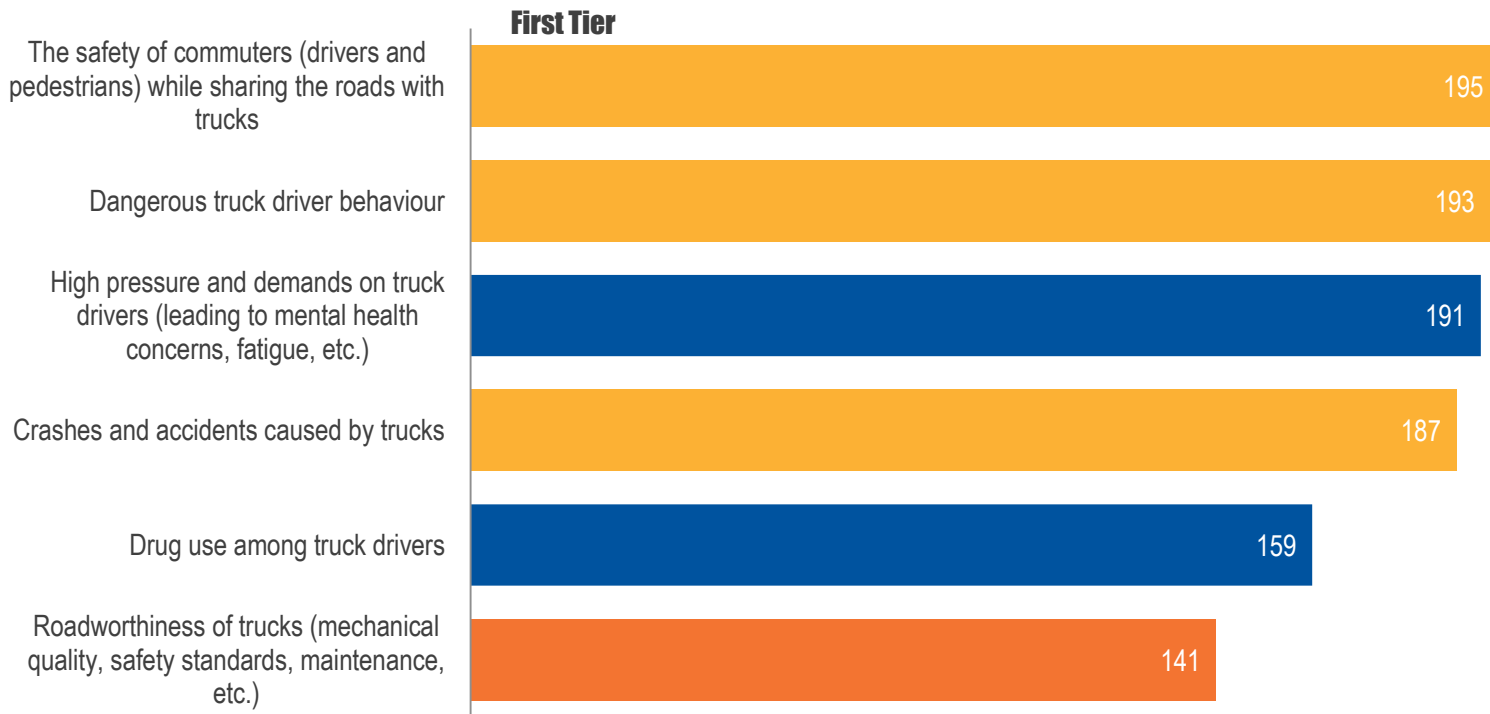
The Importance of Concerns: Overall

The top four most important issues are clear - they all relate to the safety of commuters and truck driving behaviour. These concerns are twice as important as the average concern tested, and almost 12 times more important than the least important issues (time spent waiting at level crossings and the cleanliness of trucks).



Tier 1: Most Concerning Issues

Notably, all top tier concerns relate strongly to safety issues. The general safety of consumers narrowly ranked ahead of dangerous truck driver behaviour and the high pressure put on truck drivers with respect to shift length and deadlines – we know from focus groups that consumers believe demands on drivers contributes to behavioural issues and safety for truck drivers and other commuters.

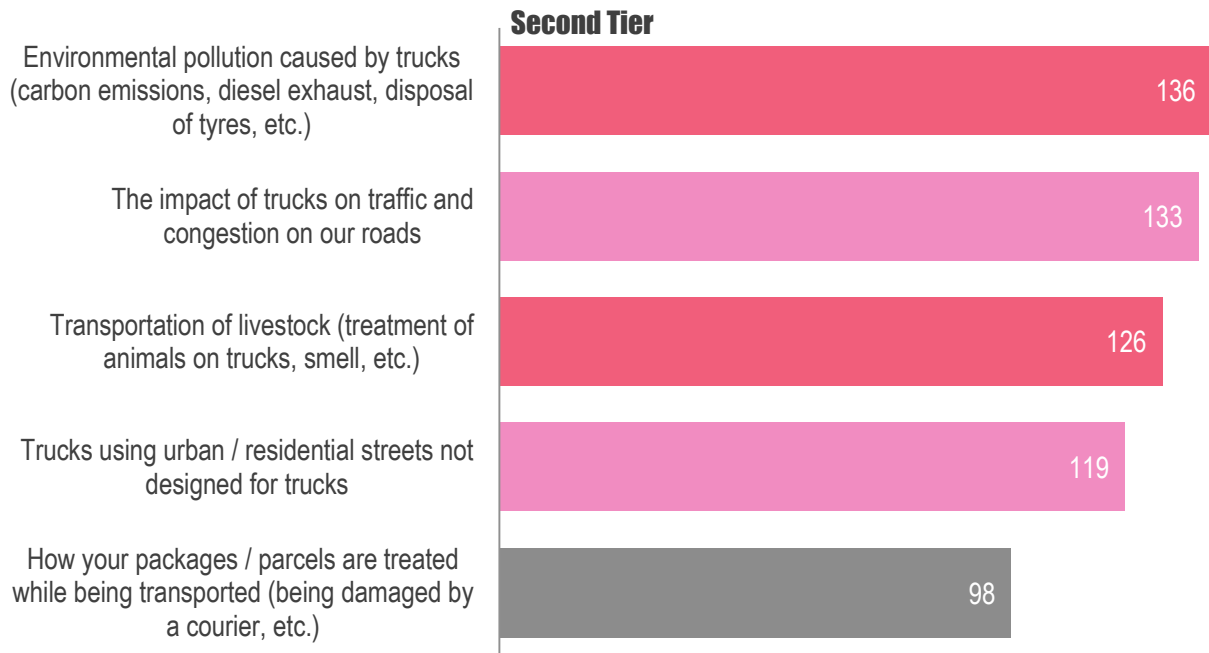


This aligns with focus group participant concerns – but now there is more emphasis on commuter safety.



Tier 2: Most Concerning Issues

Issues ranked in the second tier of importance are still of above average importance to the Perth community, and should be recognised as such. Environmental concerns begin to appear in this tier, as do traffic congestion issues.



Safety of Commuters



Truck Driver Concerns



Traffic Issues & Congestion



Environmental



Quality of Trucks



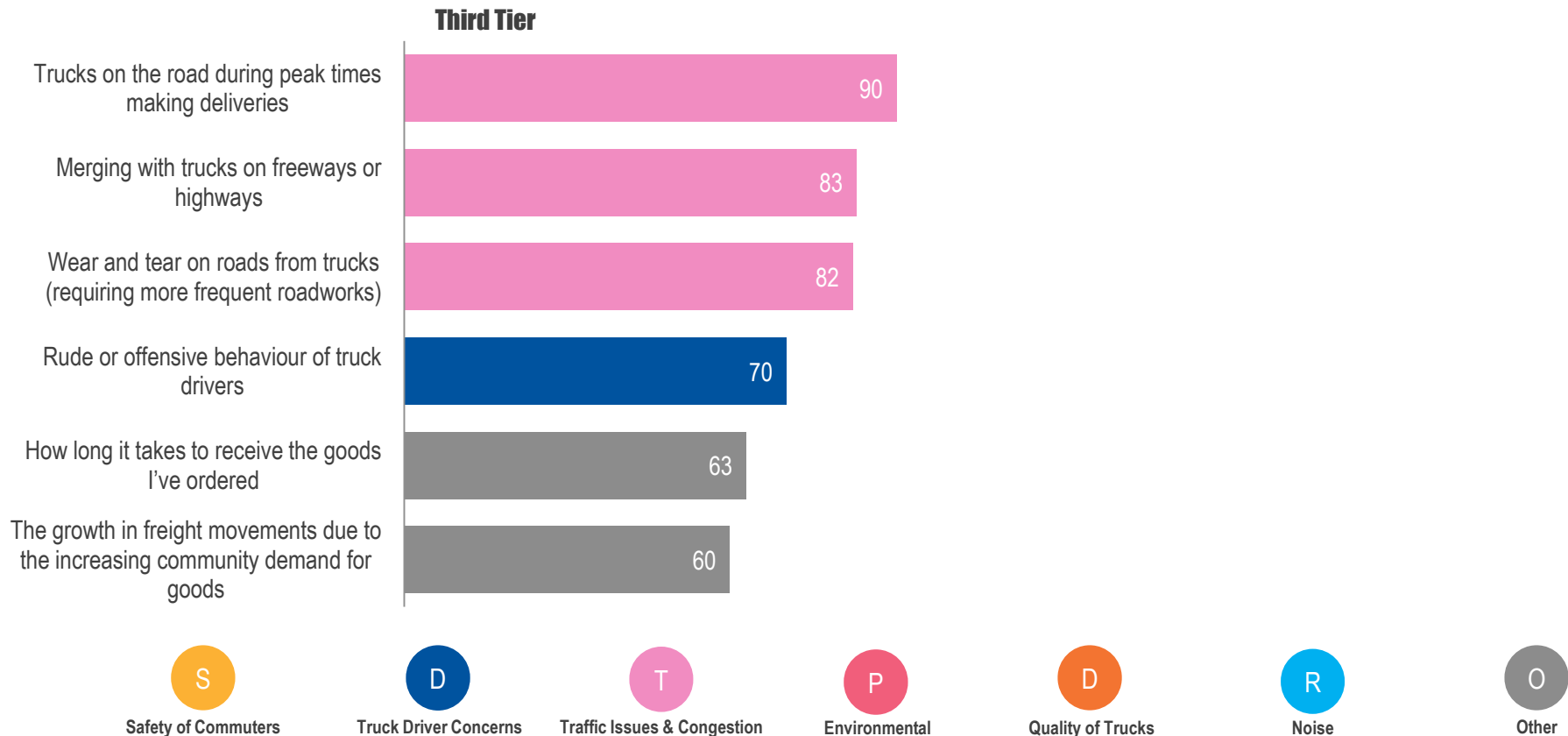
Noise



Other

Tier 3: Less Concerning Issues

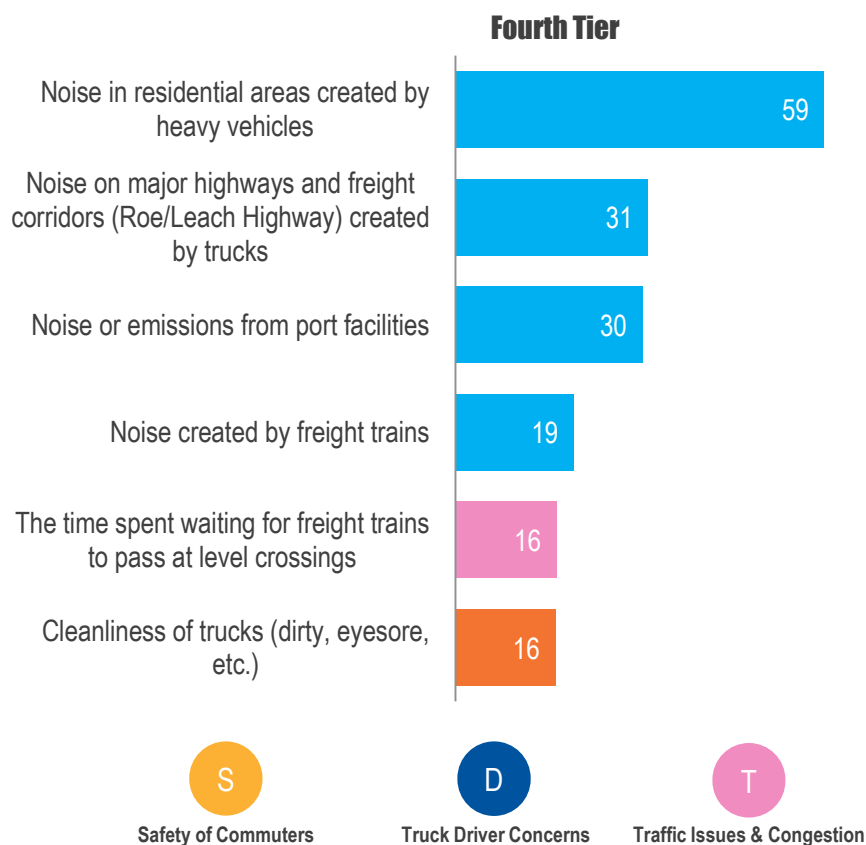
These concerns rank below average in their importance to the Perth community. Concerns relating to interacting with trucks on the road during peak times ranked lower than expected based on focus group responses, suggesting these issues are comparatively less important than others.



Tier 4: Less Concerning Issues

The concerns below are considered least important to Perth residents. Four of the bottom tier concerns are related to noise disturbances, suggesting noise from freight operations is not an important issue for the majority of residents – Clearly the industry and other parties have been successful at minimising the effects of noise.

At this time, noise from freight isn't an issue the social licence campaign needs to worry about addressing.



Which issues are in each age segment's top 10 priorities?

The top 10 issues are important to all age segments, which makes it easier when it comes to targeting certain age groups with messaging. The two youngest age groups had a unique priority, namely how packages they've ordered are treated in transit – a generational indication, no doubt!

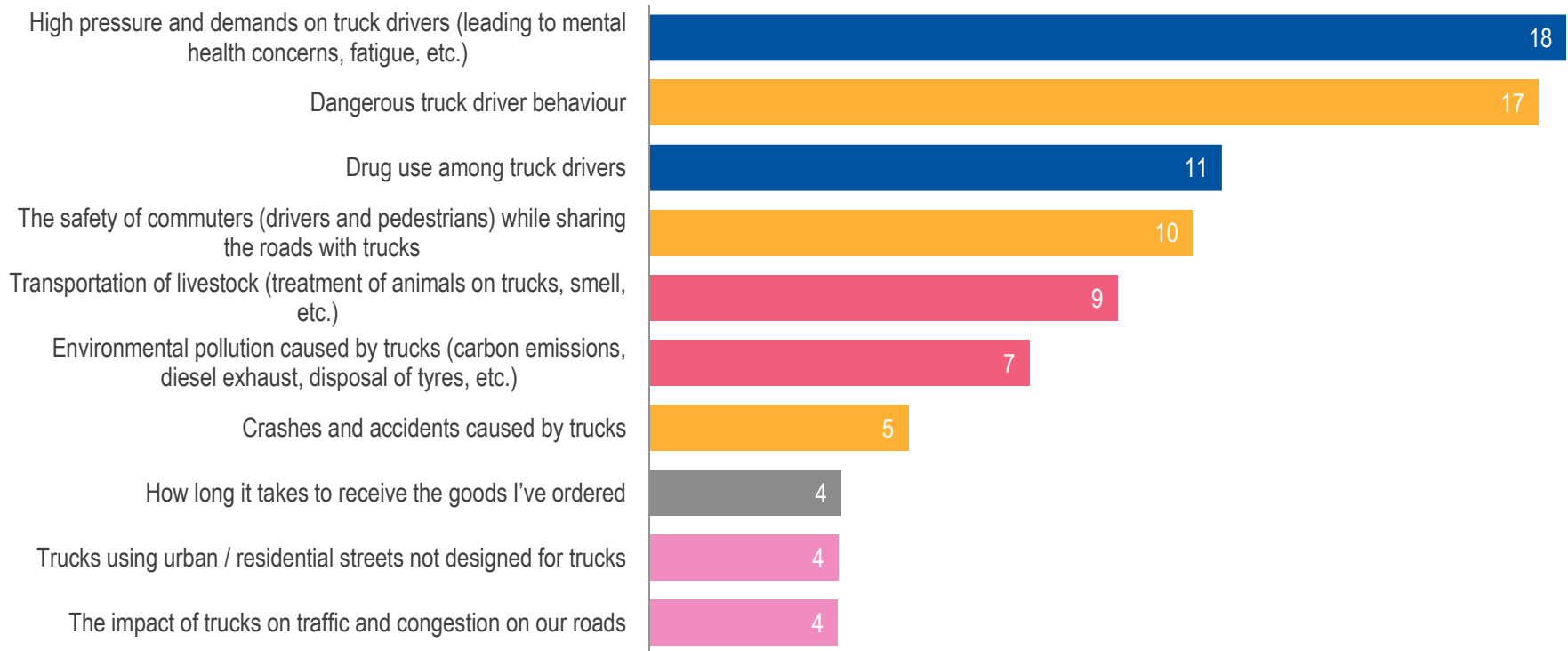
	Overall Rank	18-24	25-34	35-44	45-54	55-64	65+
The safety of commuters while sharing the roads with trucks	1	1	1	2	4	1	2
Dangerous truck driver behaviour	2	2	4	1	1	3	3
High pressure and demands on truck drivers	3	4	3	4	2	2	1
Crashes and accidents caused by trucks	4	3	2	3	3	4	4
Drug use among truck drivers	5	6	7	5	5	5	5
Roadworthiness of trucks	6	8	8	7	6	6	6
Environmental pollution caused by trucks	7	5	5	8	7	9	9
The impact of trucks on traffic and congestion on our roads	8	10	9	6	9	7	7
Transportation of livestock	9	7	6	10	8	10	10
Trucks using urban / residential streets not designed for trucks	10	12	11	9	10	8	8
How your packages / parcels are treated while being transported	11	9	10	12	11	14	14
Trucks on the road during peak times making deliveries	12	15	12	11	14	11	11
Merging with trucks on freeways or highways	13	16	14	13	12	13	13
Wear and tear on roads from trucks (requiring more frequent roadworks)	14	14	15	14	13	12	12
Rude or offensive behaviour of truck drivers	15	13	16	15	15	15	15
How long it takes to receive the goods I've ordered	16	11	13	16	17	18	18
The growth in freight movements due to the increasing community demand for goods	17	19	18	17	18	17	16
Noise in residential areas created by heavy vehicles	18	17	17	18	16	16	17
Noise on major highways and freight corridors created by trucks	19	20	20	20	19	19	19
Noise or emissions from port facilities	20	18	19	19	20	20	20
Noise created by freight trains	21	21	23	21	21	21	21
The time spent waiting for freight trains to pass at level crossings	22	22	21	22	22	23	23
Cleanliness of trucks (dirty, eyesore, etc.)	23	23	22	23	23	22	22

Are there any issues that stand out when looking at 'First Choice' values?



Top 10 'First Choice' Issues

Another way of looking at the data is to examine which issues were ranked as the highest First Choice issues, i.e. how many respondents rated each concern as their most important concern overall. Interestingly, environmental concerns ranked higher as First Choice options than they did on overall importance. This means these issues stand out as highly important to particular sub-segments within the community.



Safety of Commuters



Truck Driver Concerns



Traffic Issues & Congestion



Environmental



Quality of Trucks



Noise



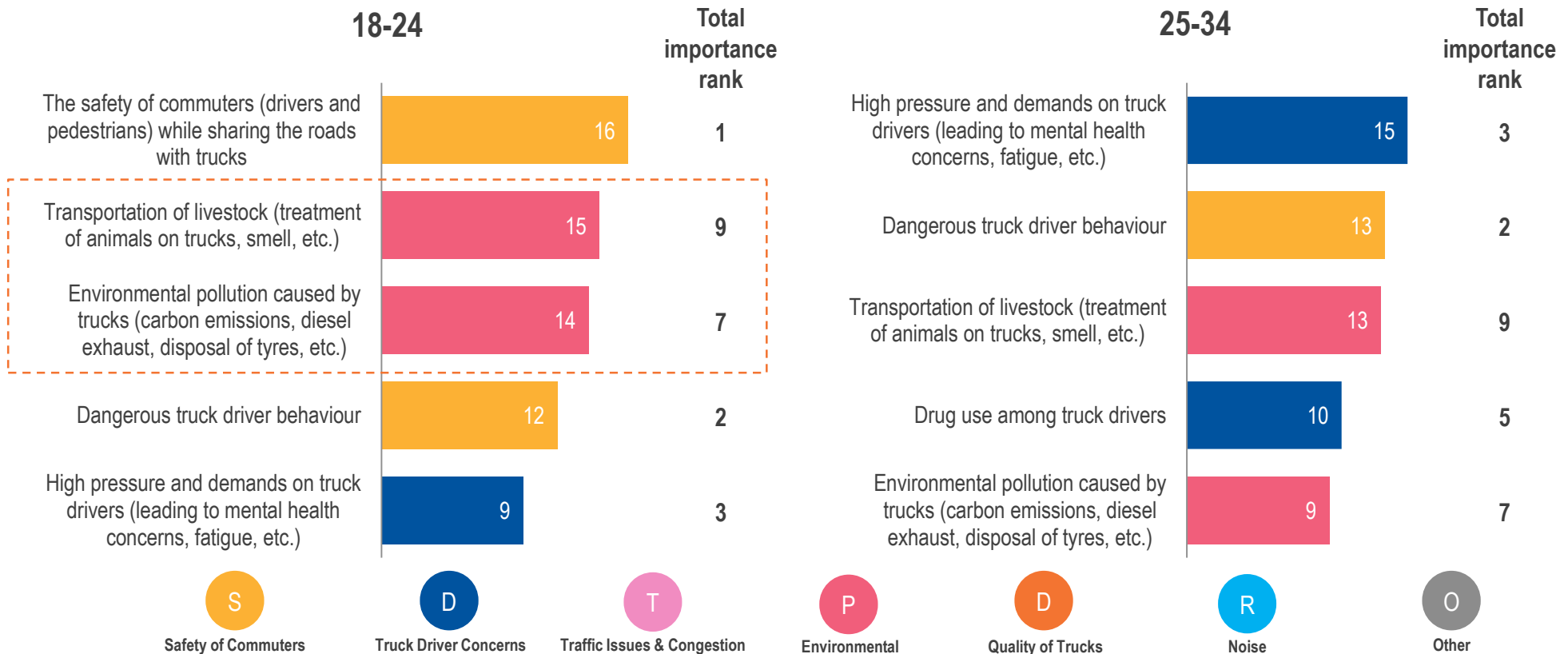
Other

There are some clear differences by age in terms of overall importance and 'first choice' value - particularly regarding environmental concerns.



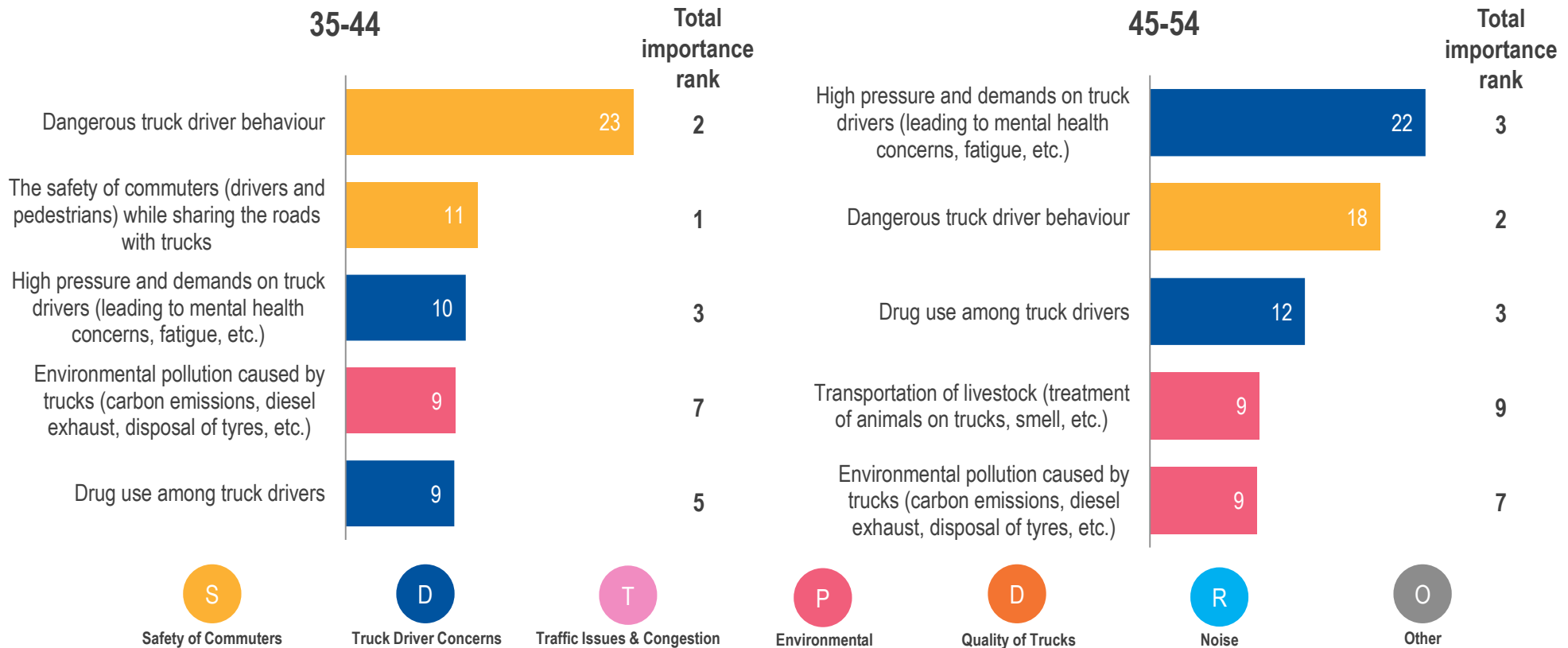
Top 5 'First Choice' Issues: By Age

Younger consumers, particularly those aged 18-24, are more strongly concerned about environmental issues than other older age groups.



Base: All respondents (n=613)

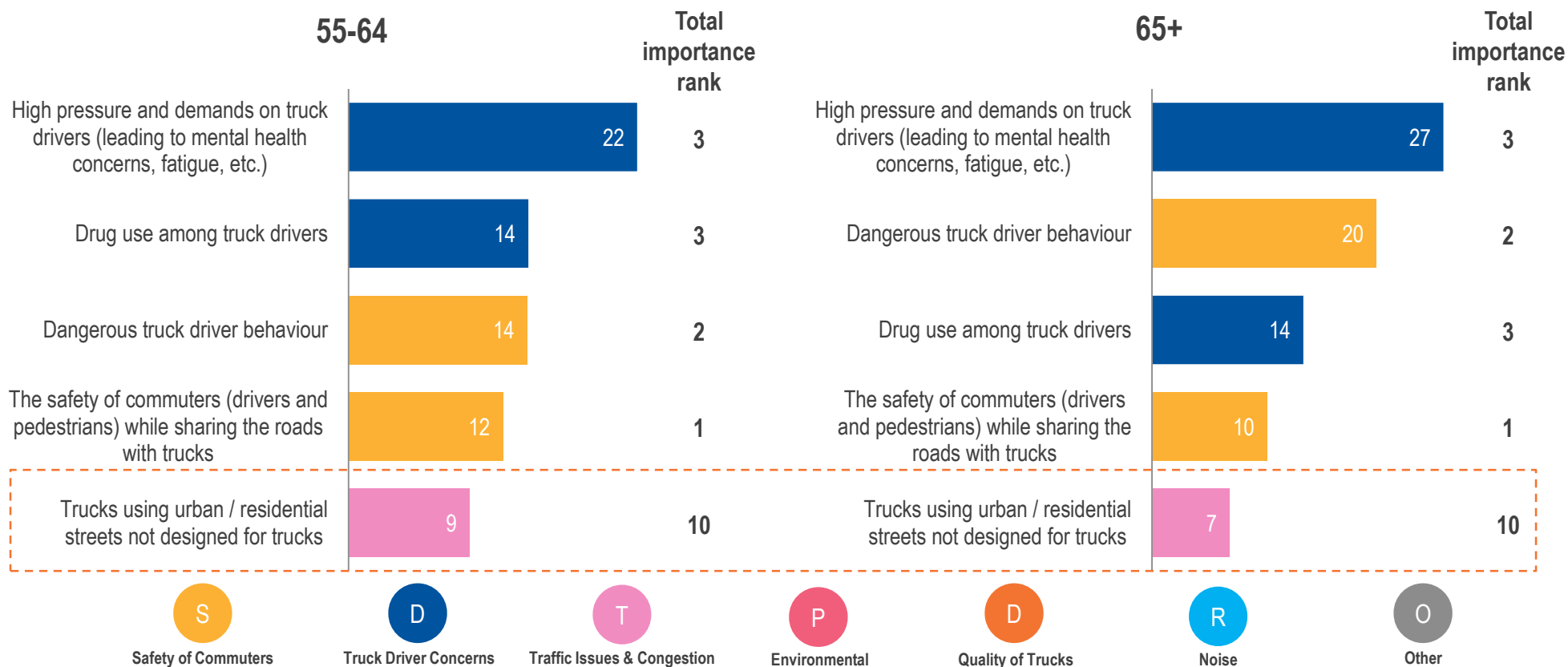
Top 5 'First Choice' Issues: By Age



Base: All respondents (n=613)

Top 5 'First Choice' Issues: By Age

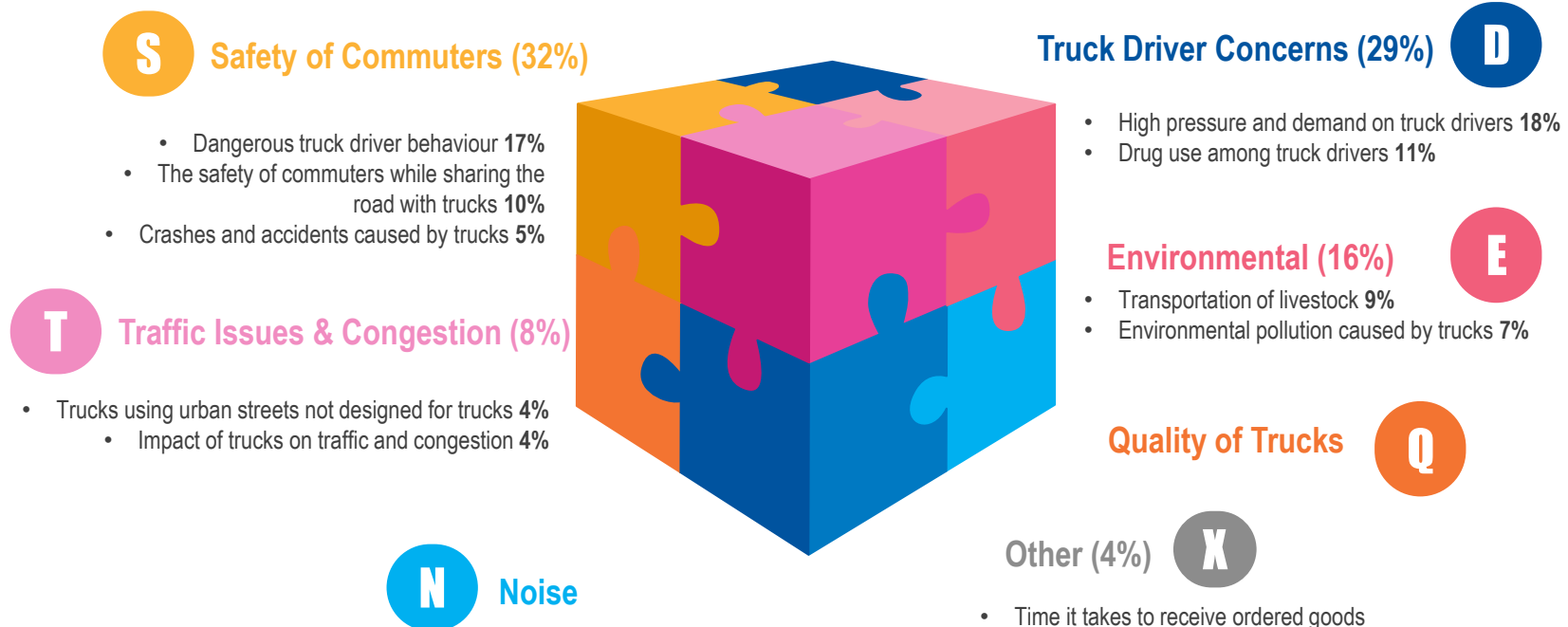
Consumers in the two older age groups are uniquely more concerned with traffic issues, particularly trucks using urban and residential roads. Notably, environmental concerns don't make it into the top 5 First Choice issues for these age groups.



Base: All respondents (n=613)

First Choice Issues by Category

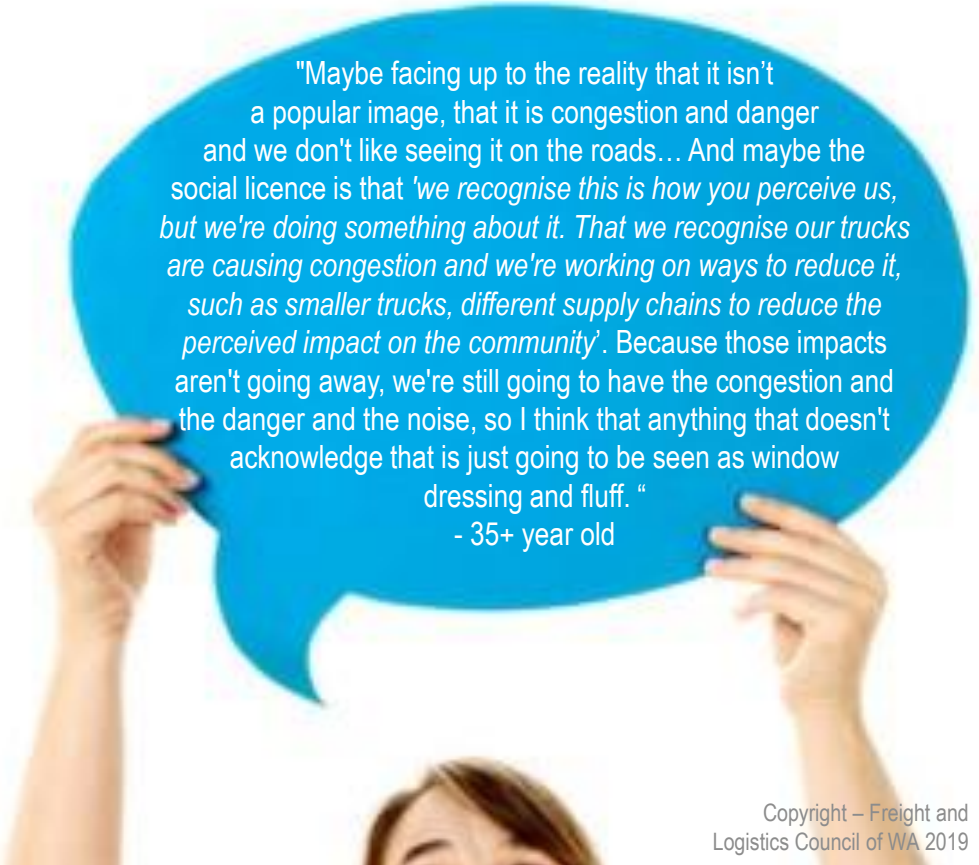
Safety is clearly of greatest importance to consumers, with concerns around commuter safety and truck driver behaviour accounting for 61% of total First Choice 'share' across the 23 attributes. Specifically, high pressure on truck drivers (18%) and dangerous driving behaviour (17%) emerged as the top two First Choice issues.



**What can be done to alleviate
or mitigate these concerns?**



A key to the social licence campaign will be to acknowledge key concerns and demonstrate how the industry plans to address them.

A person's hands are visible at the bottom, holding a large, blue, speech bubble-shaped graphic. The bubble contains a quote in white text. The person's face is partially visible at the bottom center of the frame.

"Maybe facing up to the reality that it isn't a popular image, that it is congestion and danger and we don't like seeing it on the roads... And maybe the social licence is that *'we recognise this is how you perceive us, but we're doing something about it. That we recognise our trucks are causing congestion and we're working on ways to reduce it, such as smaller trucks, different supply chains to reduce the perceived impact on the community'*. Because those impacts aren't going away, we're still going to have the congestion and the danger and the noise, so I think that anything that doesn't acknowledge that is just going to be seen as window dressing and fluff. "
- 35+ year old

Specifically, consumers will respond well to hearing about concrete plans to alleviate some of their biggest concerns.



01

COMMUTER SAFETY / DANGEROUS DRIVING AND FATIGUE

- Advocating for legislation around truck driver shift length, etc.
- Exploring automation / driver assist technology for long haul drivers to reduce fatigue effects

"Cuts out the human factor, which means you don't have fatigue as an issue, and so on." 18-34 year old

02

ENVIRONMENTAL POLLUTION

- Planning to utilise 'greener' technologies, such as electric or fuel cell vehicles

"To the extent we can transition our freight and trucking industry away from diesel engines to either electric or fuel cell technologies, which only emit water, then this whole issue of pollution goes away." 35+ year old

03

CONGESTION

- Exploring more rail and light rail capabilities
- Restricting heavy vehicle movements to certain times of day

"I'm sure there is stuff like that out there, but we don't know too much about it not being in those industries." 18-34 year old



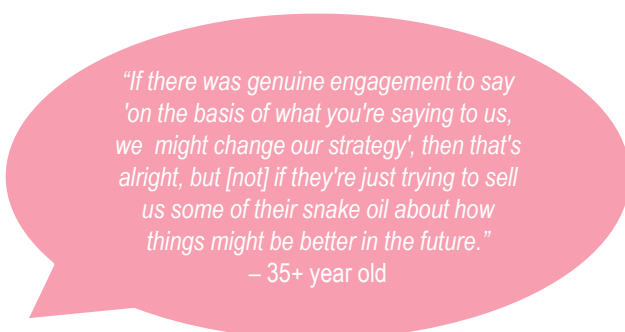
However, it's critical that any engagement with the community and strategies to mitigate concerns are genuine, and real action follows.




The need for genuine action was most prominent among the older group.



"There's no point in community engagement unless they're actually going to be educating about the changes, rather than just informing community 'this is what we're doing'. I don't believe in community engagement just to spruik their wares unless they're trying to educate about a change that is sincerely going to happen."
– 35+ year old



"If there was genuine engagement to say 'on the basis of what you're saying to us, we might change our strategy', then that's alright, but [not] if they're just trying to sell us some of their snake oil about how things might be better in the future."
– 35+ year old




"Is there going to be a fundamental change, or is it just going to be a mitigations strategy to reduce community resentment. A real adaptation would be electric trucks or completely change the distribution system so there are no trucks on the road."
– 35+ year old

A key for the industry will be how to ensure the work they're doing to mitigate concerns and improve social licence reaches the target audience.

Freight and Logistics Council of WA
151 followers
3w

The Westport Taskforce has identified a way to increase freight rail capacity and efficiency in Kwinana. Currently, the freight rail network servicing the Western Trade Coast is close to capacity. Learn about the proposed solution to increase freight on rail in Kwinana in the latest Westport Beacon: <https://lnkd.in/fp4brxj>

[#westport](#) [#railplanning](#) [#westerntradecoast](#)



Westport Beacon
mysaytransport.wa.gov.au

Freight and Logistics Council of WA
151 followers
1w

Thank you to **Transafe WA** for the opportunity to talk about the importance of social licence for the freight industry at last week's Transafe Forum. With the credibility of the industry hinging on the experiences and perceptions of the community, it is more important than ever for transport operators to be responsive to changing community concerns and expectations in order to develop and maintain their social licence. See our website for more information on the Freight and Logistics Council of WA's work on social licence - <https://lnkd.in/fZpuXhS>

[#freight](#) [#sociallicence](#) [#flcwa](#)



Freight and Logistics Council of WA
151 followers
2d

Thank you to the **City of Canning** for inviting the Freight and Logistics Council to participate in today's Design Thinking Sprint. There were some fantastic ideas on how we can use data and technology to improve the efficiency of the logistics journey through the City of Canning for the benefit of all residents and ratepayers. This is a particularly important conversation given the growth in the region and the \$4.3bn the industry generates in gross regional product and we look forward to working with the City on the next steps to advance this work.

[#canningbusiness](#) [#freightandlogistics](#)
[#designthinking](#)





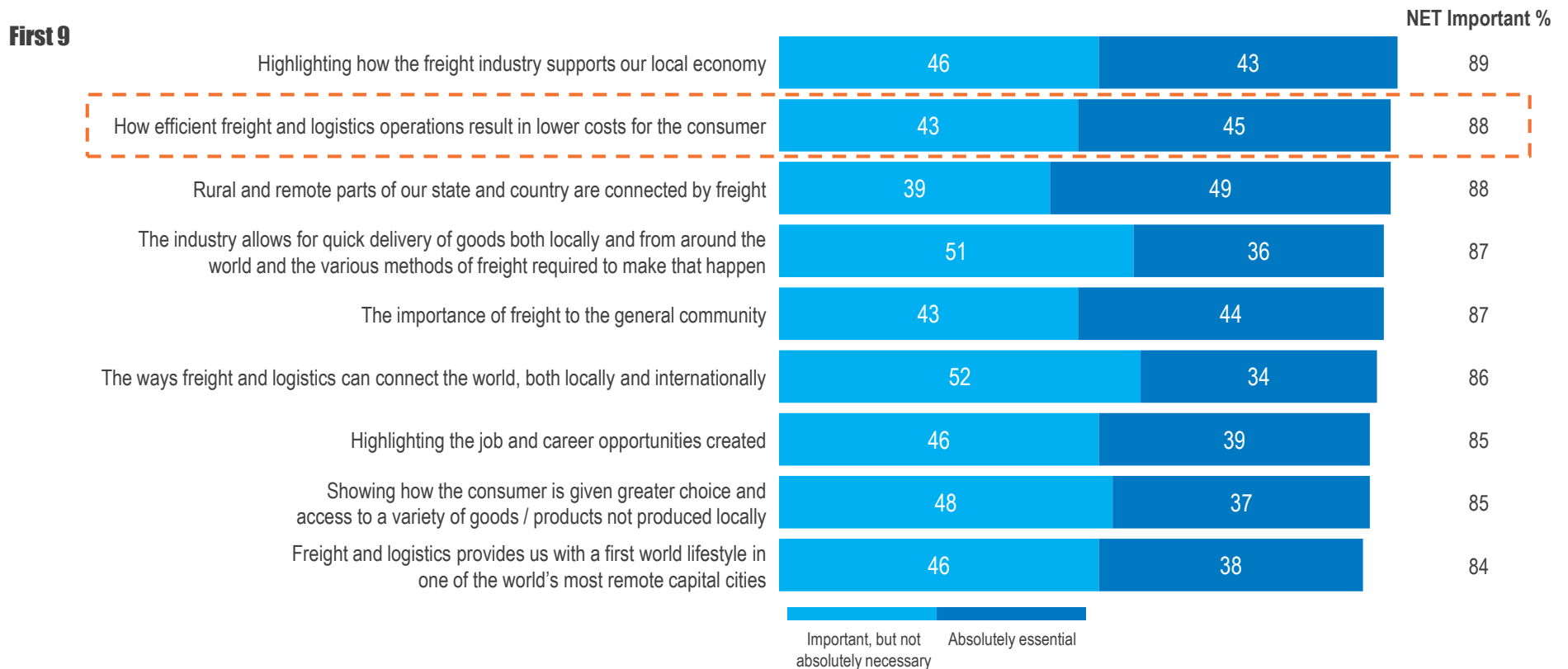
Developing the Campaign

So how should a social licence campaign execution look?



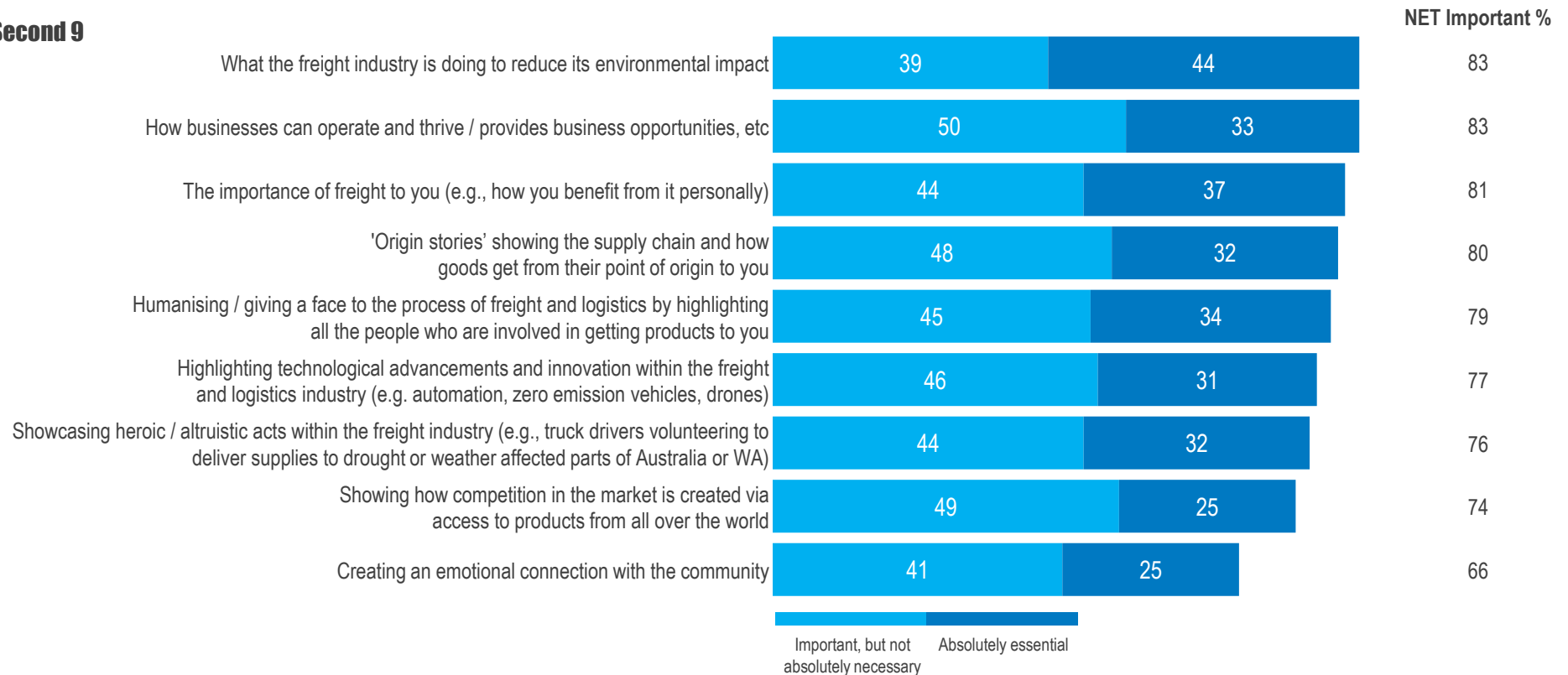
Most residents felt the campaign should include an array of elements.

Notably, despite low agreement that freight operations help keep cost of living down, almost 9 in 10 suggest this benefit should be highlighted in the campaign.



Survey respondents consider an emotional connection less important, but still recognise the importance of creating a personal connection with freight and humanising the process.

Second 9



We then asked groups to pretend they were the ad agency in charge of the campaign...



...and they came up with some interesting ideas about the kind of social licence campaign they'd like to see.



The most effective ad campaign will show the 'journey' and processes behind freight, but focus strongly on the human side and the people involved.



Behind the scenes processes ✓✓✓✓

- Consumers are interested in the 'behind the scenes' journey of goods and their packages
- Show **'origin stories'** of where goods come from, and all the steps involved.

"You know the parcel places where they all go over and under each other? I want to see more of that! I want to see like a Monsters Inc. door, with a package passing through it." 18-34 year old

"Put a GoPro on a package, and see what happens. Focus on the change over at different ports and facilities. And show the people involved at each step, too." 18-34 year old

"Showing the area certain goods come from, like chocolate. Showing all the poorer people who harvest the beans, and then how it gets to us here. And then you could show mum and her kid who grabs a chocolate and walks out of the shop with it." 18-34 year old

Show new technology ✓

- Some express interest in learning about new technology, like automation and driver assistance tech, as well as drones and other innovations



Personal side of freight ✓✓✓✓✓

- An effective campaign needs to show all the people involved, at a human level
- Includes people in the freight industry, as well as the end consumers who benefit from it
- Demonstrate how needs are met by freight – needs will have to be personal and relatable, e.g., needing medicine or connecting overseas families
- Portray how freight connects rural Australia and those personally affected

"I think that's the things it's missing, is that personal side of it, because that's what makes you feel emotive about it. So it's about old Margaret living in Tom Price who can get her eggs because the trucks going there. Personal, as opposed to really generalised." 18-34 year old

"Campaign needs to say that someone has a need, it gets filled because of the freight industry. You can do it through examples of connectivity like the grandchild opening the present, you can do it through an example of medical emergency, someone needing medicine; you can do it using examples of rural areas and how freight matters there." 35+ year old

To pull this together, the campaign could develop an engaging storyline approach to evoke meaningful personal connection.

Perth residents suggested putting together an intriguing, week-by-week storyline campaign showing the steps and processes behind freight, and the people involved at each stage – both within and outside the industry.

"Storylines from all sides of it. So you have a campaign where it was about the person who was getting her eggs in Tom Price. Then another story again you play the following week about the truck driver. Then you had another one where they're meeting and dropping the freight off, or picking the freight up."
- 18-34 year old

"The people buying, the people selling, the people delivering. Put together as a storyline over a few weeks. That'll be really engaging for people."
- 18-34 year old

"There's a need that needs to be fulfilled, there's a story of how it is fulfilled [by freight], and you think 'Oh wow, I hadn't thought about that. Freight Matters'"
- 35+ year old

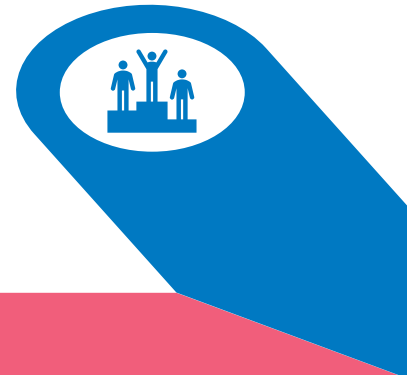
"A lot of ways you could create drama, pathos, romance, family affiliation."
- 35+ year old

Other considerations for the execution

Focus on the benefits ✓✓✓

Consumers suggest focusing on the positives and benefits of the industry, rather than dwelling on the negatives.

"Benefits resonate better with people. Like when you watch political advertising, focusing on negatives isn't as effective as a positive message about something." 18-34 year old



Put a positive spin on the negatives ✓✓

Nonetheless, they suggest a social licence campaign should take any opportunity to address negatives and concerns with the industry, by showing how the industry plans to alleviate them and by putting them into a more positive light.

"It could say 'We understand we [trucks] are in the way, but there's a reason!'" 35+ year old

"It's the price we pay for having a first world lifestyle." 35+ year old



Include a 'call to action' or tailored message ✓✓

A call to action was something seen as missing from the Main Roads 'Freight Matters' campaign. Something as simple as a website to visit for more information or a statement about supporting the industry will go a long way to inspire action.

"You could put at the end 'Thank you for supporting overseas industries with your purchases.'" 18-34 year old

"That I, as a consumer, am doing good by supporting the industry." 18-34 year old



How might a social licence campaign come together?



A successful social licence campaign might involve more than just a single ad execution.

A multi-pronged, multi-angle approach will likely be the most effective way to promote the social licence campaign.

Acknowledge & Address concerns

1

- Consumers communicated their desire for the industry to 'own up' to the perceived issues of freight and logistics, and to genuinely engage with the community about how they plan to alleviate them.
- This could be part of a particular campaign, or reflect ongoing community engagement and management of the industry's image.

Create Personal Connection / Gamification

2

- From a broader perspective, the industry could consider ways to engage creatively with the community.
- Gamification of freight, such as images and information on sides of trucks and trains, will also help create connection with the industry and leverage consumers' curiosity about freight and logistics.

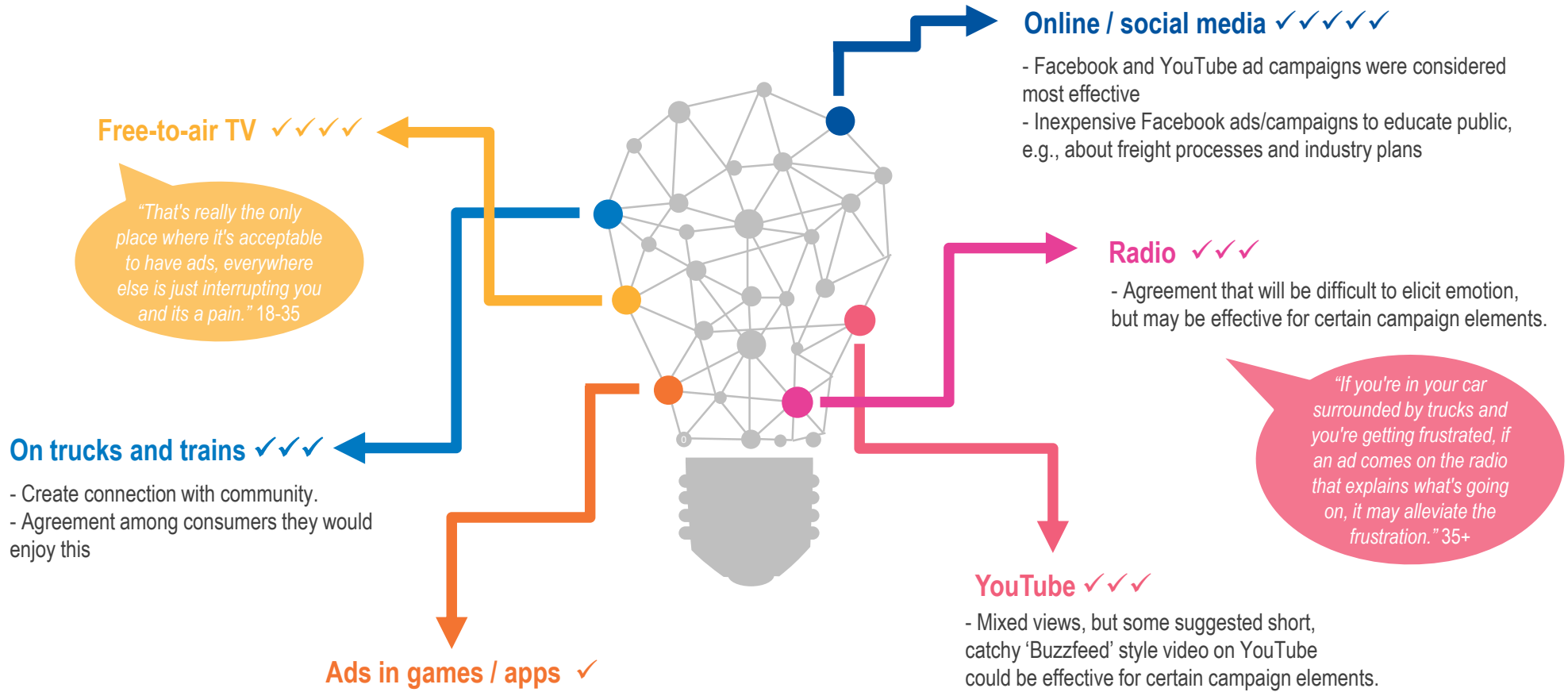
Engaging Ad Executions

3

- While there are a number of possible angles to take, consumers will find most appealing a campaign that tells an engaging story about freight, the process, and the people it touches along the way.
- An execution that educates consumers on the value of freight from a 'human' perspective may be most effective.

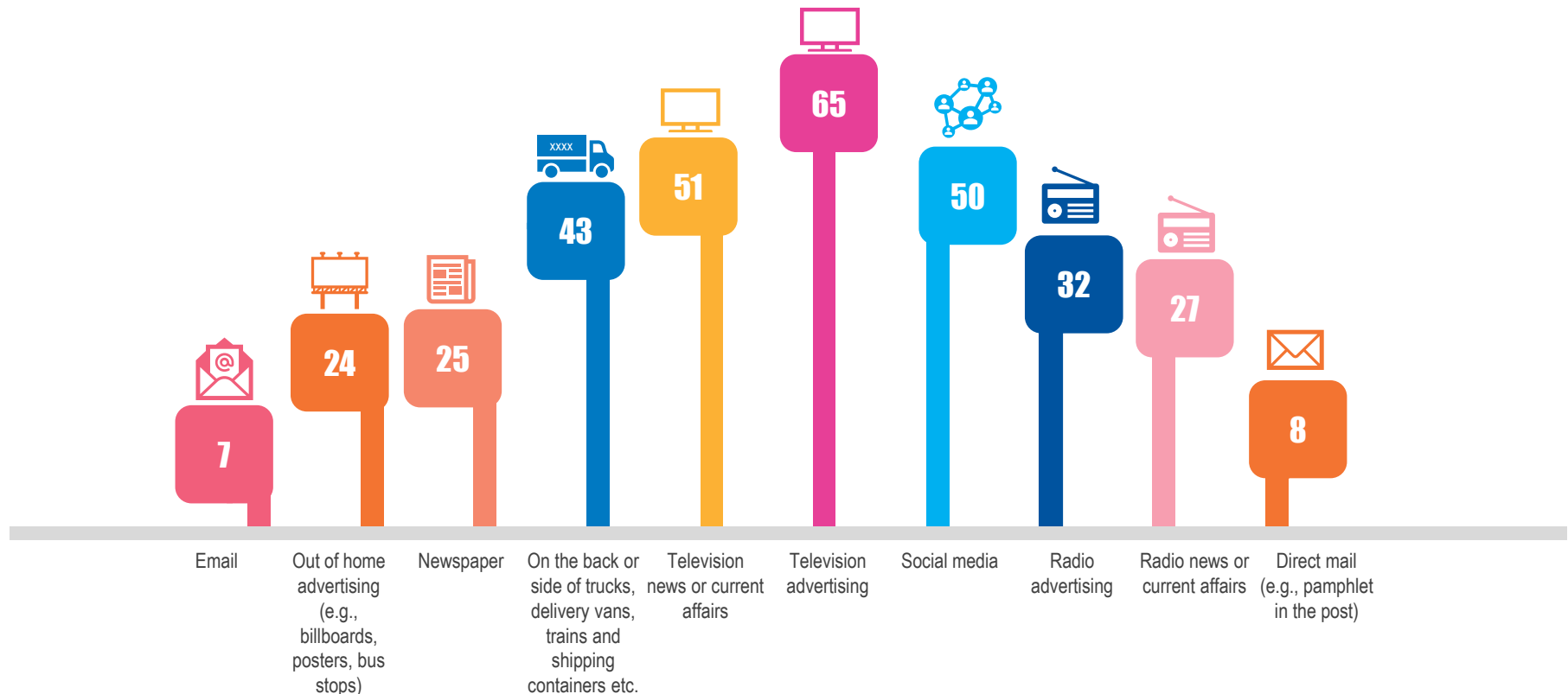
Consumers suggest a mix of channels to advertise the campaign, and each could serve a different purpose.

For example, an integrated storyline campaign could be aired on TV and YouTube, whereas social media platforms will be best suited for infographic-type campaign material and educational resources.

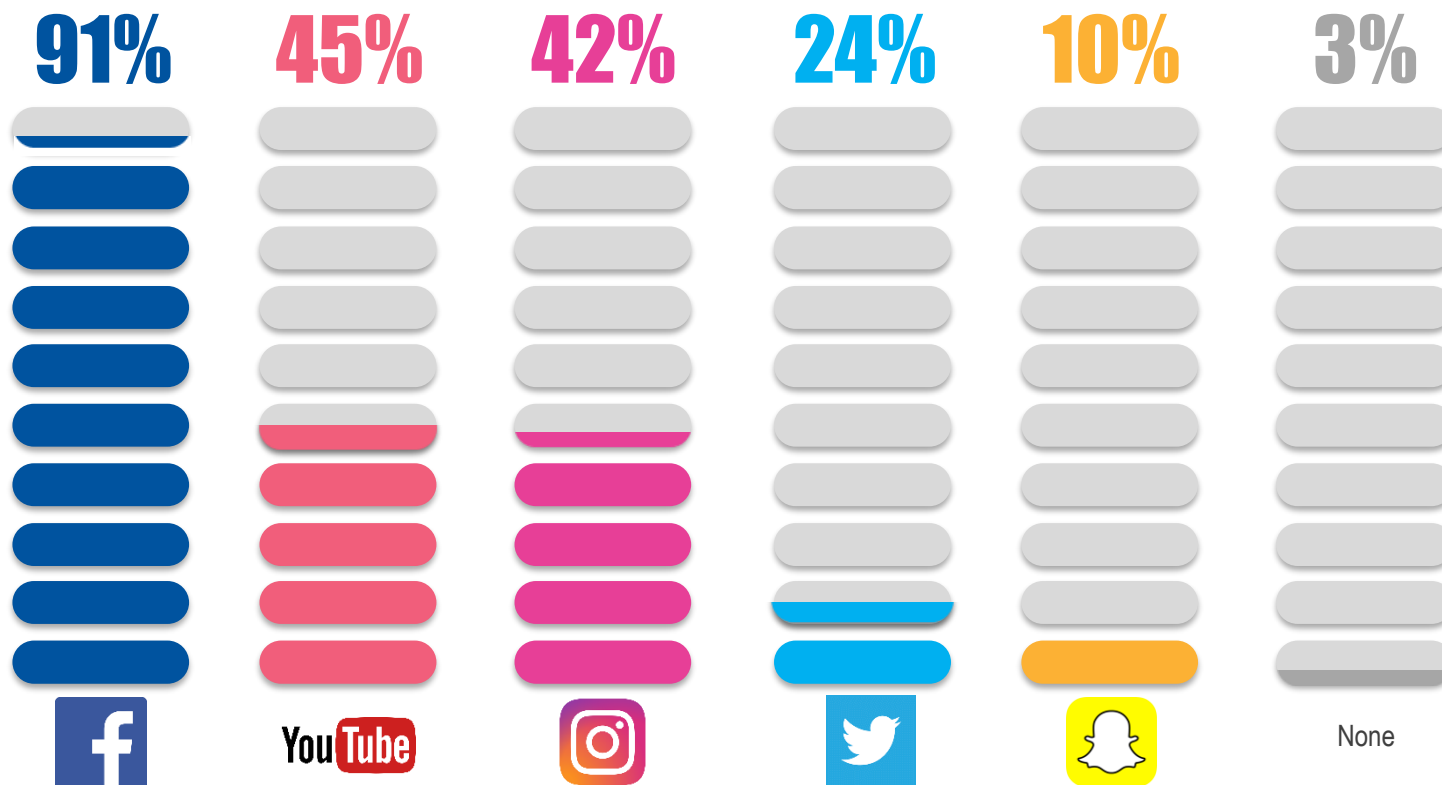


Survey respondents agree that TV and social media will be the best platforms for the campaign.

On the back or side of trucks, shipping containers and other freight delivery mechanisms is also rated highly.



Overwhelmingly, Facebook is considered the most effective social media platform to advertise a campaign like this.



Social media channels will be relatively inexpensive means of promoting messages, such as future industry plans to mitigate concerns...

...or to educate consumers, particularly younger ones, about freight processes and the significance of the industry.

The Future Transport Technology Roadmap: An Overview

Emerging technology has the potential in the coming decade to revolutionise transport by making it a much more personal service for customers. It also has the potential to realise the full value of our transport system.

The NSW Government has committed to industry input, to ensure that the industry can better connect and apply their own experience. This overview describes the key areas where they might influence personal goods and services in the future, and the potential benefits of these technologies.

We have developed a Technology Roadmap plan to do next and what we will do next. It concludes by explaining what the industry can do for customers in a few short years.

The future of transport in NSW

1. Customer focused
Customer experiences are seamless, interactive and personalised, supported by technology and data

2. Successful places
The liveability, amenity and economic success of communities and places are enhanced by transport

3. A strong economy
The transport system powers NSW's future \$1.3 trillion economy and enables economic activity across the state

4. Sustainable
The transport system is economically and environmentally sustainable, affordable for customers and supports emissions reductions

6. Sustainable
The transport system is economically and environmentally sustainable, affordable for customers and supports emissions reductions

24 HOURS IN AIR CARGO

- OVER 80,000 tonnes transported
- 100,000 planes take off
- 20 MILLION parcels sent
- 140,000 tonnes of cargo carried
- SINGLE DAY: 657 MILLION PACKAGES WORTH \$17.8 BILLION
- \$18.6 BILLION VALUE IN CARGO SHIPPED
- 1.1 MILLION motorbikes transported
- OVER 200 race horses transported
- 6,849 Pets sent
- 896 MILLION letters sent

\$9,500,000,000.00

THE TRUCKING INDUSTRY INVESTS AT LEAST \$9.5 BILLION IN SAFETY EVERY YEAR.

TRUCKING

Key Insights



In general, awareness of freight and logistics is limited – more than half admit to having poor or extremely poor knowledge.



Awareness of the industry is limited across the board, however females and those aged 18-24 rate their knowledge the lowest. Specific knowledge of freight is limited to what Perth residents see and are impacted by.

However, the majority feel they know as much as they need to. Positively, females and those aged 18-24 do express a desire for more information – mostly in terms of the operations of freight (how it works and how it impacts them). Those younger also would like to know more about the environmental impacts of freight and if there are ways they can minimise the impact (i.e. choosing different delivery methods).

Most importantly, there is a clear relationship between knowledge and sentiment toward the industry. Those who rate their knowledge the highest are also more likely to be positive, accepting and supportive toward the industry!

There is a clear opportunity to address the lack of knowledge – particularly among younger demographics. Hopefully the Social Licence Campaign can address the gaps in knowledge and lead to an increased acceptance of the industry.

Overall, most are supportive of the industry. However, there is room to shift some perceptions!



3 in 4 indicate they are supportive of the industry, with South East Metro the most supportive and those aged 18-24 the least supportive. 7 in 10 are also accepting of the industry with the majority indicating it's essential and we need it!

Positively, there is little negative sentiment toward the industry overall, however only two thirds indicate feeling positive toward the industry (with those aged 18-24 feeling the least positive) – the remainder rate feeling neutral.

In addition, only two thirds indicate they believe the industry is reputable and trustworthy – indicating a clear opportunity to shift perceptions of the industry. Moreover, less than half (47%) agree the government does a good job of planning for Freight and Logistics.

More needs to be done to communicate the work of the government in terms of planning for Freight and Logistics. There is also a negative perception that the industry is not as trustworthy as it could be – these perceptions needs to be addressed to help increase support toward the industry as a whole. The Social Licence Campaign should aim to increase the trustworthiness and reputation of the industry.

For the most part, Perth Residents acknowledge the benefits of Freight and Logistics and its positive impact to their life.



Perth residents know their life would be different if Freight and Logistics didn't exist or was reduced. Overall, the key benefits were seen to be job creation, economic benefits (such as imports and exports) and the connections it creates.

However, only 6 in 10 agree the industry helps lower the cost of living for food, clothes etc. Particularly, given most shop online it's clear this is taken for granted to some degree. This is particularly lowest among those with low income, while those aged 25-44 years old are more likely to acknowledge this as a benefit.

The Social Licence campaign should aim to increase awareness of how the industry helps to reduce costs of goods and convey this message clearly. This is a clear opportunity as consumers are directly impacted by this and once aware will likely be more accepting and supporting of the industry.

In general, most feel impacted by trucks and therefore are also most concerned about aspects relating to trucks on our roads.



While most can't comment on the increase or decrease of freight activities, two thirds believe the number of trucks on our road has increased in the past 5 years.

While concerns are fairly uniform across the board, it is evident that those younger have the greatest range of concerns compared to those older.

Above all, safety of commuters is seen as the single most important concern for Perth Residents followed by dangerous truck behaviour, accidents involving trucks and the high demands placed on truck behaviours. In addition, concerns around the conditions for truck drivers were also mentioned (including time away from family, mental health and stimulant use).

The safety of commuters on the road should be a key focus of the Campaign – including how road users should interact with trucks to ensure the safety of all on the road. In addition, it will be important to shift negative perceptions of the industry and communicate ways the industry is helping all truck drivers to alleviate these pressures.

Residents say they want a campaign that highlights the personal and social benefits of freight, and shows the fast-paced, exciting nature of the industry.



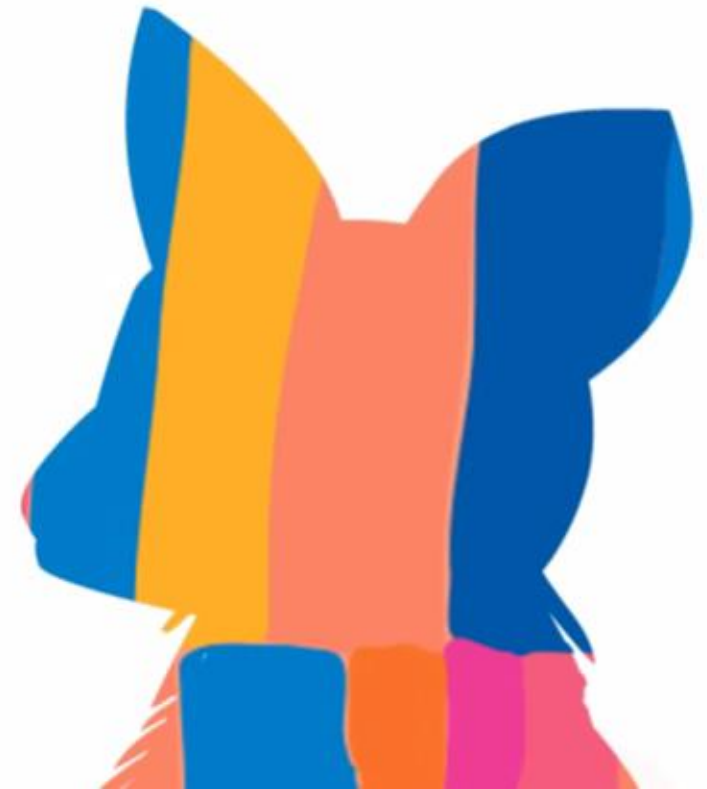
Storytelling emerged as a key ingredient in the campaign. In particular, residents want to feel connected to the freight and logistics industry and want to see the 'human' side to its operations.

Using storytelling was suggested as an optimal approach to this, such as creating a 'timeline' story that shows the different people affected by, and involved in freight and logistics operations.

Many consumers, particularly younger ones, express an interest in the 'behind the scenes' components of the industry, and would respond well to campaign material that highlights this exciting and fast-paced world.

The campaign will need to pull together different aspects, such as acknowledging key concerns and highlighting how the industry plans to address them; developing creative ways to engage with the community and improve perceptions around freight; and develop an engaging campaign that highlights the personal side of freight.

Hunt Smarter.



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