



Department
for Transport

Planning Routes and Crossings in the UK Haulage Sector in 2022

Qualitative Research Report

June 2023

Department for Transport
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Contents

Contents	3
Executive summary	5
1.1 Key Findings	5
1.2 Key Implications	8
Introduction	10
2.1 Background	10
2.2 Objectives	10
2.3 Methodology	11
2.4 Sample	12
Audience Profile	13
3.1 Qualitative Profiling of Haulage Managers and Organisations	13
Exploring and Mapping the Decision-Making Process that Haulage Companies go through	16
4.1 Factors that drive decision-making in route planning	16
4.2 Processes in decision-making	19
Understanding the Main Challenges to Route Planning, including the Impact of EU Exit and COVID-19	22
5.1 Main challenges and how they impact route planning	22
5.2 The impact of EU exit on route planning	24
5.3 The impact of COVID-19 on route planning	27
Identifying and Exploring the Factors that Affect Haulage Companies' Decisions to use Particular Crossings/Ports	32
6.1 Exploring decision-making around port and crossing choice	32
6.2 The impact of disruption at ports and crossings	34
6.3 Changes in choice of ports and crossings	36

Understanding the Contingency Plans that Haulage Companies have in Place for Future Challenges and Disruption	39
7.1 How haulage managers mitigate and adapt to challenges	39
Identifying and Exploring Perceived Opportunities and Needs of the UK Haulage Industry	44
8.1 Opportunities for the UK haulage industry	44
8.2 Key support needs identified by haulage managers	45
Conclusions and Implications	47
9.1 Key conclusions from the research	47
9.2 Key implications	47
Appendix	49
10.1 Sample Breakdown	49
10.2 Discussion Guide	52
10.3 Glossary of Terms and Abbreviations	54

1. Executive summary

1.1 Introduction

The Department for Transport (DfT) commissioned this qualitative research to update its understanding of how haulage companies plan their routes and crossings between the UK and EU, as well as how they have responded to recent significant events and changes in the market conditions, and how they plan to adapt in the future.

The research comprised 27 in-depth interviews with haulage managers, from freight forwarders providing haulage services to clients/customers, and private carrier companies operating their own fleets to transport their own goods. The sample included companies of varying sizes, based across a range of UK locations, and using a range of UK ports and crossings when carrying goods between the UK and EU.

Interviews took place between March and June 2022. The research findings will help inform longer-term planning aiming to build greater resilience into UK supply chains.

1.2 Key Findings

How haulage companies select routes

Several factors underpin route selection: The start point and destination of the journey, the cost of the journey (including fuel efficiency, length of the route and cost of crossing), the nature of the goods being carried, customer choice/influence, a consideration for drivers' hours and breaks and, less frequently, individual driver preference. These factors have remained constant across the coronavirus (COVID-19) pandemic and EU exit.

Unsurprisingly, route selection processes vary between businesses, but at a high level, the large companies interviewed (250+ employees) tend to have dedicated planning teams, employ specialist technology, and follow formalised planning processes. While medium (50-249 employees) and smaller (10-49 employees) companies interviewed have a more ad hoc approach, often with a single decision maker, and rely on drivers to make more decisions about route planning.

Factors influencing flexibility in route planning

The research identified different types of flexibility exhibited by haulage managers:

1. Real time responsiveness (the way they respond in the immediate short term to unexpected disruption)
2. Flexibility in route planning more generally both short term (i.e. for a few days or weeks) and long term/more permanently
3. Flexibility in crossing choice both short and long term (as above)
4. Other more general adaptations for the longer term, made in response to events such as COVID-19 and EU exit

Company size, location and type of goods being transported were found to be the most important factors affecting a company's degree of flexibility across all flexibility types. Both large and small companies were found to have a degree of flexibility when responding to challenges and disruption, with some medium-sized companies reporting the least amount of flexibility across all flexibility types.

Companies with larger planning teams, dedicated systems and route-planning technology tended to have fixed, centralised, and formalised route planning processes, which previously rarely changed. However, whilst this might mean that they are slower to respond to unexpected disruption in the short term, they have a degree of flexibility built-in when it comes to temporary route planning or crossing choice e.g. by having multiple vehicles on the road, which can feed back information about disruption, and enable other vehicles to be re-routed or through having accounts set up with multiple ports making ticket purchases quicker.

Small companies with a single decision maker and a smaller fleet, were more likely to plan each trip on an ad hoc basis, rather than using specialised route planning technology. This may include trusting their drivers to choose their own stops and adjust decisions once on the road. They tended to respond quickly to unexpected disruption, by making agile decisions such as rerouting if possible.

Crossing choice in route planning

The route planning process usually begins by deciding on the crossing point. This is often pivotal in the decision-making process. The choice of crossing is strongly correlated with start point and destination, but also the UK location of the business and the cost and speed of the overall journey.

The Short Strait crossings (from the Port of Dover to Calais and the Channel Tunnel [operated by Eurotunnel] at Folkestone to Coquelles, near Calais) were frequently described by those interviewed as being heavily disrupted, creating challenges for those haulage managers who rely on what is often seen as the default crossing point, due to location, speed, service frequency and cost.

Disruption at UK (and EU) ports encouraged some of the haulage managers in our sample to seek out and use alternatives to their traditional crossings (typically the Short Strait crossings) either on an ad hoc basis or on a more permanent basis.

Not all the haulage managers interviewed felt they had the capability to switch to a different port on a permanent basis. Large companies in the North of England/Scotland seemed more likely to make a long-term change, as alternative crossings may offer comparable speed and value for money. Whereas companies based in the South reported feeling they had fewer crossing alternatives to fall back on during periods of disruption.

Companies based in the North of England/Scotland also reported that rises in the cost of fuel encouraged the short term use of more expensive but closer crossings, as the cost of the crossing is offset by savings in the cost of fuel (e.g. crossing at Hull/Rotterdam instead of driving south to Dover/Calais). It is possible that this behaviour change will continue into the long term as long as fuel costs remain high.

Changing market conditions and route planning

The haulage managers interviewed reported that the coronavirus (COVID-19) pandemic and EU exit were significant challenges to their route planning processes. They also reported challenges arising from rising fuel costs (partially as a result of the war in Ukraine), driver shortages, global supply chain issues, disruption and delays at ports and crossings, and rising customer expectations (for example in the speed of delivery).

In response, some haulage managers in our sample reported considering alternative routes and crossings to attempt to avoid disruption.

An increase in journey-minimising behaviours, such as 'load sharing' (carrying a load for another company, usually arranged informally) and 'backloading' (ensuring that a vehicle has a load for the return journey), was also reported as both a short-term, and in some cases long-term, response to recent challenges.

Contingency plans for future disruption

In addition to using alternative ports, haulage managers have put in place contingency plans to deal with future changes and disruption, including more pre-planning to meet new customs regulations and anticipate disruption, allowing extra buffer time when planning journeys and factoring in cost increases to cover longer, more frequently disrupted journeys.

These contingency measures can add additional costs for haulage companies, as journeys take both longer to plan and to travel. These costs are absorbed by haulage companies where possible, but some costs have been passed on to customers, with a number of haulage managers reporting that their companies had increased their prices to cover these rising costs.

Haulage managers also reported building up or restructuring their administrative teams to be able to handle the additional requirements related to customs checks.

Future opportunities & support needs

Although many haulage managers who took part in the research were focused predominantly on potential future challenges to their businesses there was also a pragmatic/cautious optimism for the future. This largely stemmed from a sense that the industry has risen to the challenges of the last few years by providing new services and finding new ways of working and that this adaptability situates the sector well to face future challenges.

Some identified opportunities including: building new relationships with EU based companies by increasing collaboration through load sharing and backloading; utilising the knowledge and experience gained during the recent past e.g. to avoid 'pinch points' or frequently disrupted crossings; attracting new and younger drivers through training and improved working conditions and technological innovations to improve efficiency and sustainability in the industry.

When asked what might help them in the future, haulage managers mentioned improvements in communication between the Government and the industry (e.g. on any future regulation changes or to report potential disruption), a streamlining of customs processes where possible, continued support for improved conditions for drivers, and interventions to improve driver shortages.

1.3 Key Implications

Whilst this research was not designed to test or generate potential interventions or actions, it is possible to outline some general implications:

1. Haulage managers reported that historically they had felt that they are not always fully consulted on changes that impact their roles and businesses. Therefore, future consultation on key areas for the sector (e.g. customs arrangements) could help create trust that the industry's needs are being considered when making policy, bolster business confidence and foster an opportunity mindset when considering their future planning.
2. Measures to support small and medium sized businesses to investigate and adopt the technology and systems/processes that larger companies benefit from might enhance productivity and could have a positive impact on their resilience and flexibility in the future.
3. Continued efforts to make the haulage sector (and driving as a career) as attractive as possible, such as training schemes and apprenticeships, improved facilities at rest stops and services or career initiatives, could aid recruitment and retention.
4. Proactive management of peak periods to ensure that routes are clear of avoidable disruption could improve journey times for hauliers. Early and clear notice of disruption e.g. through social media, with practical alternatives for drivers to take can help ensure drivers, particularly of smaller businesses, make the best possible route crossing plans as soon as it happens.

Most of the influences on haulage managers' behaviour are habitual, related to geographical location or a response to macro environmental factors such as the COVID-19 pandemic and EU exit. Therefore, creating interventions to support flexibility and resilience will remain challenging.

2. Introduction

2.1 Background

Haulage is the business of transporting commercial goods, typically by road or rail. This is differentiated from freight, which usually employs ships and aircraft to move goods. The transport industry is one of the UK's largest employers, with approximately 1.5 million people employed by businesses in the transportation and storage sector (Clark, 2022). The number of hauliers in the UK rose significantly between 2011 and 2021, accounting for the majority of growth in the transport and storage sector (Office for National Statistics, 2021).

The UK haulage industry has undergone a period of change since EU exit and the coronavirus (COVID-19) pandemic. In light of these significant events, the Department for Transport (DfT) commissioned this qualitative research to update its understanding of how haulage companies plan their routes and crossings between the UK and EU as well as their ability to adapt to disruptions and recent challenges.

Most of the pre-existing evidence refers to the pre-EU exit period when old trading arrangements were in place. In addition, there was limited updated knowledge about how decisions are made when it comes specifically to crossings into and from the UK and EU.

Therefore, the department aimed to bolster the evidence base on travel disruption and resilience of the system by interviewing hauliers that use a variety of ports/crossings into and from the UK and EU. This will help understand more precisely how decisions to use these crossings are made, what is appealing about different routes, and in general what needs and challenges the industry is facing in relation to haulage transport after the introduction of new trading practices and whilst recovering from the pandemic. The findings of this research will help inform longer-term planning and understanding of resilience within UK supply chains.

2.2 Objectives

The specific objectives of the research project were:

1. Explore and map the decision-making processes that haulage companies go through when planning which crossings to use when transporting freight from the UK.

2. Identify and explore the factors that affect haulage companies' decisions to use particular ports or crossings.
3. Understand the contingency plans that haulage companies have in place for future disruption, both in the short and long term and how this impacts choice of port.
4. Identify and explore the opportunities, needs and challenges that haulage companies face in the medium and long term e.g. in the light of post-pandemic changes.

2.3 Methodology

BritainThinks conducted 27 in-depth hour-long interviews with haulage managers from across the UK and from a range of businesses. Interviews were conducted by video conference (Zoom/Teams). A qualitative approach was chosen, due to the exploratory nature of the research objectives. Qualitative interviews allow the participant's perspective to influence the direction of the discussion, within parameters defined by a topic guide. This provides more 'authentic' insight about the subject matter and ensures that the interview surfaces issues of importance to the audience which might not have been foreseen.

The interviews were conducted with a sample of senior managers from relevant UK-based haulage businesses (see 2.4 and appendix 10.1 for full sample details) who were recruited using 'free find' methods by specialist business-to-business research recruiters. An initial warm-up letter was issued by the Department for Transport to be sent to potential participants, to help reassure potential participants that the research was genuine.

Interviews were conducted from 17 March 2022 to 14 April 2022 and then from 6 May 2022 to 13 June 2022. Due to a number of factors (the end of the financial year, the war in Ukraine, and ongoing disruption due to new crossing arrangements) recruitment for the initial fieldwork period was slow. Both recruitment and fieldwork were paused for the pre-election period but restarted on the 6 May 2022 after the local elections. Recruitment in the second fieldwork period was focused on large companies (over 250 employees) as these had previously been hardest to recruit and were least represented in the sample. Additional specialist recruitment partners were used to increase the reach of the recruitment. Haulage bodies were also contacted, and they publicised the research on their websites. Whilst this did not directly result in contacts for interview, it did provide a reference point for recruiters to cite when approaching potential participants.

It is also worth noting that fieldwork coincided with a large ferry company reducing a significant proportion of its UK crew members, triggering a series of disruptive events at UK ports. This event was therefore top-of-mind for the haulage managers in our sample, as result of both news coverage and direct experience.

Analysis of the interviews took the form of initial content analysis to classify responses from each interview by topic and question, in a grid format. Content was drawn from audio recordings of each interview. A thematic analysis was then conducted to draw out themes, insights and supporting evidence within each topic and question. Quotations from individual participants were noted, and transcribed verbatim where they illustrated relevant themes and insights. Several of these have been used throughout the report.

2.4 Sample

Careful consideration was given to the sample design to ensure that there was a sufficient mix of haulage companies. The sample consisted of 27 haulage managers from small, medium, and large UK-based companies. Table 1 sets out the split of company size against freight forwarding and private carrier companies. Recruitment was stopped at 27 as data saturation (the point in the research process when no new information is discovered in data analysis) had been reached. Many of the haulage managers in the sample had similar experiences and clear and consistent insights were emerging within the data with no new insights emerging from additional interviews.

The companies were based across a range of geographical locations, with representation from Scotland to Cornwall, and delivering to (and from) a range of EU countries. The majority of the sample reported using more than one crossing, with many reporting using a variety of crossings (both the Short Strait crossings and others). Two thirds of the sample consisted of small and medium companies. Discussions focused almost exclusively on RoRo (roll on, roll off accompanied freight carried on lorries and vans) as this was the main means by which research participants' businesses were transporting freight to/from the EU by road, with LoLo (load on, load off unaccompanied shipping) mentioned infrequently.

Table 1: Company Size and Type

Company Size	Freight Forwarding companies	Private Carrier
Small (10-49 employees)	6	3
Medium (50-249 employees)	7	3
Large (250+ employees)	5	3
Total sample	18	9

The sample included businesses from across the UK, including companies based in London, the South East, South West, West and East Midlands, North of England, Wales and Scotland. These businesses all reported using more than one crossing, these included Dover, Folkestone, Portsmouth, Southampton, Hull, Harwich, Newcastle and Liverpool. The sample also included a range of good types, including frozen and fresh foods, pharmaceuticals, musical equipment, furniture, military equipment and wholesale goods. Further sample details can be found in the appendix.

3. Audience profile

3.1 Qualitative Profiling of Haulage Managers and Organisations

The sample design for the project was based around two key audiences: freight forwarder companies, who provide haulage services to clients/customers, and private carrier companies operating their own fleets to transport their own goods. However, company size, location and type of goods being transported were also found to be key factors for understanding a company's ability to flex and their general approach to route planning.

Company type

When exploring the differences between freight forwarders and private carriers it is important to note that the UK haulage industry is somewhat complex and naturally flexible in its approach. Haulage companies of all sizes and description will at times hire third party drivers and/or vehicles, even those with their own large fleets. Equally there were a number of examples of small freight forwarders who had their own vehicles which they used in combination with third party hires.

Company size

Company size was found to be the strongest indicator/shorthand for a company's behaviour and decision-making when route planning (in the context of this small-scale qualitative study). Larger companies were found to have a distinct set of processes that impact the routes they take. This included more care for drivers' working conditions and better technology/resources for route planning, ultimately manifesting in more formalised processes. At the other end of the scale, smaller companies were generally found to have a more agile, ad hoc approach.

Both large and small companies were found to have a degree of flexibility, in terms of their real time responsiveness and in route planning and crossing choice, when responding to challenges and disruption. Some medium sized companies in our research sample described lacking both the agility of smaller companies and the more significant resources of larger companies which could impact their ability to respond to unexpected disruption and limit their flexibility in relation to route planning and crossing choice.

Company location

The location of a company was also found to be a strong indicator of a company's flexibility. Companies in the North of England or Scotland reported that they were able to choose to make use of the UK's northern ports, such as Hull and Newcastle. While companies based in the South, reported feeling that they have fewer alternative ports available, and were therefore found to rely more heavily on Dover in particular. Location therefore is a key factor to consider when examining the industry's flexibility.

Load type

The type of goods being carried was also found to be an important factor when understanding a company's flexibility and approach to route planning. For example, freight forwarders who transport a variety of goods might be more able to respond to challenges and disruption by choosing which goods to transport at which times. The major wholesalers interviewed indicated that they could be limited by the nature of their freight. In certain cases, such as refrigerated loads in which journey time is paramount, or large or abnormal loads where load size and/or weight limit route selection, choice of route is more determined by the load than when carrying other good types.

We will refer, throughout the report, to these company characteristics. As company size was a key determinant of flexibility in route planning, we will also make frequent reference to each end of the size scale to indicate the range of behaviours encountered. As such, throughout the report we refer to 'small companies' and 'large companies' to distinguish between the two most distinct sample categories. Where a distinction exists between those transporting their own goods or not, we will indicate this by saying 'small freight forwarder/s' or 'large private carrier/s'. When discussing the behaviour of companies with between 50-249 employees, we will refer to 'medium companies' of either class. Please note that the sample sizes are relatively small, so we refer to each sub-sample to indicate directional rather than firm differences.

It is important to note that we identified different types of flexibility exhibited by haulage managers which we summarise below. We will use the shorthand labels in brackets to refer to these in the report where relevant, when describing how businesses have reacted and/or adapted to challenges.

- **Real time response to unexpected disruption** (real time responsiveness). This refers to the immediate short term response of drivers or haulage managers to unexpected disruption on routes or around ports and crossings.
- **Flexibility in route planning generally, both temporary and longer term behaviour changes** (temporary and/or long term route flexibility). This refers to the decisions and changes that can be made by haulage managers (and in some cases drivers) to the routes they use, but does not necessarily include changing a crossing. This can be both temporary (e.g. in response to a short period of disruption on a route, lasting a few days or weeks) or a longer term route change to adapt to a more permanent situation.
- **Flexibility in crossing choice, both temporary and longer term behaviour changes** (temporary and/or long term crossing flexibility). This is the same as flexibility in route planning but relating specifically to crossing choice.

- **Other longer term adaptations resulting from factors such as COVID-19 and the EU exit** (general adaptations). This relates to a range of often long term changes that haulage managers have made in response to recent events and challenges.

4. Exploring and mapping the decision-making process that haulage companies go through

4.1 Factors that drive decision-making in route planning

Summary: *The haulage industry has experienced significant disruption and challenges over the past two years but the factors that drive route planning are constants. These factors are: the start point/destination, cost (e.g. fuel efficiency, length of the route and cost of crossing), the nature of the goods being carried, customer choice/influence and driver factors (including availability, their hours and their individual preferences).*

The primary factor that was reported to drive decision-making, amongst those interviewed, was the start point and end destination. This influenced which crossing was used, the number of stops that need to be taken and the journey time. For private carriers it may also influence whether they use their own fleet or employ a third-party haulier, as there are some circumstances (e.g. some longer or unusual journeys) where it may be more practical than sending their own vehicles.

“We work very closely with a haulage company, but primarily we have our own fleet of vehicles. We have quite consistent routes and quite frequent routes. We use our haulier for unusual routes.”

Medium private carrier

Cost was a crucial consideration, for this sample of UK hauliers, and so wherever possible the hauliers interviewed will ensure that a vehicle has a (full) load for both the outward and return journey. In some cases, this may involve making multiple stops along the route to deliver or pick up goods (sometimes referred to as a ‘milk run’) or involve sending goods with or carrying goods on behalf of another company (often referred to as ‘load sharing’).

“If the route is too far or we only have a couple of palettes to go somewhere, we’ll add them onto other vehicles as it’s not financially viable to run our own.”

Medium private carrier

Once these factors were determined, decision making was focused on ensuring that the route taken will be as fast and efficient as possible. This may take a few forms, either by ensuring a route has the least mileage to ensure fuel efficiency or by choosing a route that avoids 'pinch points' which frequently experience disruption or congestion, such as busy motorways, urban areas or what some haulage managers described as 'pedantic ports', which may slow down the journey time.

"We are always looking for the shortest most efficient route. We'll go to the furthest country first, say Poland, then work our way back."

Small private carrier

Journey time may also take precedence in situations where a customer has requested a specific delivery slot, for example when transporting equipment for an event, or in the case of fresh or refrigerated produce, where time is a vital consideration. In these cases, delays can be costly as either the goods may be unsellable, or a late fee may be applied to the haulier by the customer.

"If a client asks for goods to be delivered in x number of days and then it's one day or 12 hours late, that means we have to pay a penalty because it was late delivery."

Large freight forwarder

As previously mentioned, the type of goods also has an impact on decision-making. In the case of large or abnormal loads, route planning was focused on finding the shortest and least disruptive route. Accessibility, including the type of road surface, width of road or height of bridges, was also a consideration.

"Bridges are a big consideration at the moment. We've got our route optimiser set to avoid low or narrow bridges where we might get stuck."

Large freight forwarder

The value of the goods being carried was also a consideration for some of the haulage managers in our sample. Where the risk of theft was perceived to be high, rest stops took a higher precedence in decision-making, with haulage managers reporting taking extra care to book secure overnight parking or planning to travel in convoys when carrying particularly valuable load types.

"Depending on what freight they've got on is where you want them to park, because if it's valuable you want secure parking."

Large freight forwarder

The stakeholders involved in decision-making vary dependant on company type: larger companies often have transport management teams, whereas smaller companies may have just a single decision maker. Decision-making may, in some cases, be out of the hands of the haulage manager for a variety of reasons. In situations where companies were using third party contractors, routes can be decided by the haulier. In the case of large or abnormal loads, the route may be partially or wholly decided by the local police or Highways Agency, as lanes may need to be closed or cleared. In rare cases, small freight forwarders reported the customer planning the route and booking the crossing, for example in the case of fresh produce/refrigerated haulage.

“The customer books the tunnel for us, so we have to go the route they want. We have strict delivery time because it's fresh food that's refrigerated being transported, so this means that time is key.”

Small freight forwarder

A major consideration, especially for large companies with their own fleets, was drivers' hours. In order to make journeys as cost and fuel efficient as possible it was reported to be important to ensure that drivers' break times align with natural breaks in the journey, for example during a ferry crossing or overnight after a full day of driving. For large companies with full-time contracted drivers this was a particular consideration when planning their routes and was often built into route planning technology, such as transport management systems.

“Drivers have a certain amount of driving time and if you plan it wrong, they might end up having their weekend wherever their time runs out.”

Medium private carrier

“You're looking at a driver, you're looking at his hours, then you're looking at the availability of other drivers, because you're looking at utilising drivers coming in from Europe from other depots.”

Large private carrier

Driver preferences may also be taken into consideration when planning a route. This was particularly significant amongst smaller freight forwarders or private carriers, who acknowledge the expertise of their drivers, in the absence of transport management teams or route-planning technology. The small companies interviewed were more likely to have a more ad hoc approach to route planning, trusting their drivers to choose their own stops and make good decisions once on the road, facilitating temporary route planning flexibility. Larger companies were more likely to organise these stops for their drivers ahead of time. Choice of port/crossing was, however, less likely to be routinely left to driver discretion, except in some cases of unexpected disruption where a driver makes an ad hoc choice to switch ports.

Driver preference can take different forms:

- Some haulage managers reported using certain drivers for repeat journeys, ensuring that they are familiar with the country and the route.
- Some hauliers reported booking drivers' preferred service stops and hotels, especially when they're doing the same route repeatedly.
- There were also mentions of choosing drivers for routes which take in their country of origin, in order to double up their journey as a home visit.
- Certain clients were also reported to request certain drivers.

4.2 Processes in decision-making

Summary: *The route planning process usually begins by deciding on the crossing point, after which the route is built around other considerations such as journey time and cost. Companies with larger planning teams, dedicated systems and route-planning technology were found to have fixed processes and regular routes with flexibility in real time responsiveness built-in internally. Smaller companies with perhaps a single decision maker, smaller fleets and using live mapping websites, were found to be more likely to plan each trip ad hoc and make agile decisions whilst on the road.*

Deciding on a crossing was a key factor in route planning amongst those in our sample and was often pivotal in the decision-making process. Once the start point and destination are established (e.g. UK to EU), deciding on a crossing point is the first and most vital step in route planning. In a minority of cases where a customer or third-party haulier has an influence in route planning, they may specify which crossing they would like to be used, or in some cases make the booking for the haulier. Once the crossing is booked, the route is then planned around it, with other considerations (such as rest stops) being secondary.

Large companies tended to have more formalised route planning processes, whilst small companies were more likely to have a more agile and ad hoc approach to route planning. Medium-sized companies demonstrated traits of both, having some formal and some ad hoc procedures, depending on their company structure.

Larger companies, whether freight forwarders or private carriers, were more likely to have teams of transport managers who plan the routes and inform the drivers. They were also more likely to have fixed routes, which are used consistently and rarely change. Routes were planned well in advance to ensure that both a vehicle and driver are available. In the case of a last-minute request, third-party hauliers were often contracted in, as the rest of the fleet will already be engaged.

Large companies were also more likely to use route planning technology, such as a transport management system (TMS) or route optimiser. These systems allowed transport managers to find the fastest most efficient route, whilst also filtering for other criteria such as rest stops. Large companies, with their own fleets and contracted drivers, were more likely to plan and book rest stops along the route, considering factors such as overnight security and driver comfort. Flexibility in real time responsiveness is built in internally; with multiple vehicles en route, they can support each other in case of breakdown or relay information to vehicles following behind in the case of unexpected disruption.

The following quotes describing route planning processes illustrate how larger companies behaved.

“When we receive an order from a customer it comes into our transport management system. The TMS tells us about any paperwork associated with the job that we might need to do to go abroad. It's then input by our planning team. We have different sub-teams for each country, as each has different rules. We then use a system called a route optimiser, which gives you the best route. So a lot of planning is now automated.

Once the route is picked the team book the crossings and stops. We normally plan about two weeks ahead, but we're trying to do it faster because that is what the customers want. Mostly we use Dover and Holyhead. Every now and again we do have to divert for different reasons. A couple of years ago you couldn't touch Dover, because the M25 was a carpark. We do have to change our approach, but typically, we're trying to keep it structured and it's working for us.”

Large Freight Forwarder

“The first consideration is where the goods are being collected from and their destination in Europe. The next consideration is cost, it's all about cost. We look at the availability of drivers, to see if we can utilise drivers coming in from other depots in Europe, we look at the size of the vehicle and the vehicle's capability, but it's all financially driven.

We have our own fleet of vehicles and drivers, and a transport management team that plans the routes for them. We plan their stops and the crossing they take. If we use Dover, we send the lorries down the M1 on Sunday, so they're waiting for the boat Sunday night and then they're into France on Monday morning. But recently because we're based in the North of England, and with the disruption at Dover everything's coming north, we've been using Newcastle instead. It's all about drivers' hours, because we're North-based, we're trying to preserve their hours.”

Large Private Carrier

Small companies were more likely to have an ad hoc approach to route planning, where they reviewed routes for each journey. Routes were less likely to be fixed as destination, load type and customer demands were more likely to vary. Methods of route planning were also reported to be less formalised. Often live mapping websites were used in place of a TMS and information on road conditions/current or upcoming disruption came from informal channels, for example feedback from drivers or other hauliers.

For small companies route planning was primarily focused on crossing point, with other considerations being less fixed, and drivers given free rein to choose their route before and after crossing. This may include trusting their drivers to choose their own stops and adjust decisions once on the road, especially in response to disruption. Flexibility in real time responsiveness is built in externally as small companies rely on feedback from each other to hear about disruption. Load sharing behaviours are also common, especially for small loads or when picking up backloads.

The following quotes illustrate the route planning behaviour of smaller companies.

“As company director for a logistics company, I hate to say it, but the number one factor’s normally cost. It’s all about balancing cost with the speed needs of the customer. When we get a new job, we do a cost exercise to decide if speed or cost is more important. We look at fuel efficiency, crossings and our drivers’ hours, and if our drivers aren’t available, we see if we can hire someone externally. As you know, some crossings are cheaper than others. Dover to Calais is a lot cheaper than say Harwich to Hook. But sometimes we’ll take a more expensive crossing if it’s going to be faster.

For our regular trips we do a cost exercise the first time and then we try to stick to the same route and crossing. We don’t plan the routes per se, the drivers do that. We just tell them the crossing and the destination and then they work out their own route and stops from there. Drivers don’t like to be told how to drive.”

Small Freight Forwarder

“I import wholesale goods from the EU, mostly from Poland. I have three employees and a driver. The first consideration is always what kind of goods we’re going to be carrying, then it is where are we collecting it from. Because my business is based in Kent, we generally use Dover because it is close to there. If it’s a multi-drop, we’ll use an app but mostly it’s just the drivers’ knowledge. But I trust my driver to choose a good route because he’s been over there, so if he thinks he has found a better way I believe him.

I speak to other businesses, on a regular basis. Sometimes my driver is not able to go, so we send goods with them. They’re taking their own goods as well, so I just send mine with them if my vehicle is not full. They also tell me if there are delays on the route, for example, if they know someone out there who has been stuck a few days or delayed, it helps us avoid unnecessary hazards.”

Small Private Carrier

5. Understanding the main challenges to route planning, including the impact of EU Exit and COVID-19

5.1 Main challenges and how they impact route planning

Summary: *The main reported challenges to route planning for the UK haulage sector, in addition to macro events such as EU exit, COVID-19 and the war in Ukraine, include challenges that existed prior but have been exacerbated in recent times. These include rising fuel costs, driver shortage (as well as a perceived lack of younger drivers entering the sector), global supply chain issues, disruption and delays around crossings, and rising customer expectations (e.g. on speed of delivery).*

There are many factors that reportedly make route planning challenging for UK hauliers. Some of these challenges are established within the industry and felt to be unavoidable. The unpredictable nature of traffic conditions, drivers' hours, vehicle breakdown and tight cost margins, were frequently mentioned. The job of a haulage manager is to plan for these eventualities as much as possible, by choosing routes with the least risk of delay and quoting the correct cost and timeframe.

However, our research showed that the challenges faced by haulage managers are perceived by participants to have increased in the last few years. EU exit, the COVID-19 pandemic and global disruptions to supply chains caused by the war in Ukraine, are all reported to have exacerbated existing challenges.

The rising cost of fuel was top of mind for the haulage managers in our sample. Tight profit margins within the haulage industry mean that small increases in costs quickly affect business. Haulage managers reported that fuel prices have nearly doubled in the last year and that this has been a major challenge for the industry. Fuel efficiency is a key consideration in route planning, with journeys designed to be as quick and efficient as possible.

“The fuel costs skyrocketed with the whole Ukraine and Russia thing, and it’s not come back down since.”

Large freight forwarder

Driver shortages were also a major concern for the haulage managers in our sample. The COVID-19 pandemic contributed to short-term driver shortages, as drivers were off sick or furloughed. However, EU exit (which the haulage managers in our sample suggested has reduced the number of EU drivers in the UK), compounded by the reportedly high average age of UK drivers and low numbers of applicants is believed to have created a longer-term national shortage. With fewer drivers available, haulage managers said they were required to plan further ahead to ensure availability and were sometimes less able to take on last minute requests, a practicality at odds with the increasing need for flexibility in the industry. Regulations surrounding drivers' hours, rest stops and how frequently a driver must return to their home country further complicated route planning, as managers needed to factor in these absences on top of the usual considerations.

"There's new legislation that one week in four the driver now has to go back to his or her origin country, which logistically is causing issues. Also when you're using vehicles from another European country, that vehicle needs to go back to the origin country for one week, every six weeks. So we are now having to plan four or five weeks ahead."

Large private carrier

Global supply chain disruption has further complicated route planning for the managers in our sample. In the short term, haulage managers reported experiencing disruption in the supply of raw materials and goods, as container ships from China were delayed by lockdowns. For those exporting globally, shipping lane disruption and the lack of containers had disrupted trade and pushed up costs. Disruption to trade between the UK and EU had also complicated traditional route planning processes, and there was concern amongst those we interviewed that EU exit would have long term impact.

"We've also had 30-50% increases on some raw materials. But again, it's down to sort of supply and demand, with covid factories are outputting less."

Medium freight forwarder

"We're having to go collect the goods that should be docking from Europe. Because they can't get into Hull, they can't get into Newcastle. We're having to go collect the goods that should have docked in England for our customers, whereas normally that would have come straight off the boats, gone straight to them to produce then we would have picked it up from there and dealt with it then as a finished product. It gives us a bit more of a backlog, because the European drivers don't want to do it."

Large private carrier

Due to a reported increase in overnight break-ins, finding secure places to park overnight had become an important factor for route planning for some of the haulage managers in our sample. Concerns surrounding security related both to the theft of goods and to migrants attempting to enter vehicles stuck in disruption around ports. A small number of

haulage managers reported arranging overnight parking in other hauliers' yards to ensure the security of their loads and drivers.

"We've had break-ins to lorries whilst drivers have been asleep in the cab. That's happened in a service area, in a UK service area where you paid 33 pounds for the privilege to park in them. There's no security. It's happening more and more obviously with the cost of living going up."

Large freight forwarder

"We have had a couple of immigrants climb onto vehicles, so we have to be extra sure vehicles are secure."

Medium freight forwarder

Despite the challenges to the haulage industry over the last few years, the haulage managers in our sample reported that customer expectations have only increased. There is a perception in the industry that the culture of 'next day delivery' now expected by end-consumers has increased their customers' expectations. There were also reports of a lack of understanding from customers regarding increasing costs which are out of the control of haulage managers.

"I think with the rise of [next day delivery companies] people expect what they get in their general consumer day to day world. There's an attitude of if [next day delivery companies] can do it, why can't you do it?"

Medium freight forwarder

5.2 The impact of EU exit on route planning

Summary: *The haulage managers in our sample, from all sizes and types of businesses, reported that EU exit has had a dramatic effect on the UK haulage industry and has affected how they operate their businesses and plan their routes. Many reported experiencing increased dwell time at ports, as a result of new customs arrangements, as well as delays and disruption, increased costs, and a perceived reduction in the demand for UK goods. Behaviour change was seen in crossing choice during this period, as well as increases in journey-minimising behaviours.*

The primary effect of EU exit for the haulage managers we spoke to has been the increased complexity of paperwork needed to pass customs, both when leaving and returning to the UK. Despite the long transition period, many of the hauliers we spoke to felt that the information about what documentation would be needed once the UK left the EU was not clear and was late in coming. Haulage managers said that increased documentation and some confusion about what was required resulted in significant delays and disruption at and around ports causing problems for the industry.

"The UK to EU used to be the easiest part of what we do, but now it's just as easy to go to China as France - it's a massive change."

Small private carrier

"Brexit was last minute, even though it was in preparation for three years. There wasn't a great deal of advice out there at that particular time. You were going through all the government websites, looking for guidelines, and even though it's in there, it's not very simplified."

Medium freight forwarder

In the period directly following the exit from the EU, extreme disruption meant that many of the large private carriers in our sample stated that they were running at reduced capacity, whilst small and medium companies reported stopping or reducing their trade to the EU, choosing instead to focus on UK trade. Depots across the UK and EU reported goods sitting in warehouses unable to be shipped.

"We had freight sat in warehouses for months waiting to ship. Because the customers didn't have the right documentation."

Large private carrier

Companies, who could afford to, have reportedly restructured their planning teams or hired additional staff to cope with the increased level of administration associated with the new customs arrangements. For large companies this transition has been easier, as they have large teams who could flex as required. Haulage managers from some large companies reported that their older staff members, who could recall customs procedures adopted before EU free movement of goods regulation was introduced, had used their knowledge to help adapt to the new regulations. Others reported using a TMS system which lists the documentation required for the planned route.

"We've restructured the team, so we've got each person focusing on each country. They know the ins and outs; they know the paperwork and deal with it day in day out."

Large freight forwarder

"The TMS tells us about any paperwork associated with the job that we might need to do to go abroad."

Large freight forwarder

Some small and medium companies have adapted to the reported increase in customs paperwork, by employing a customs administrator or engaging a third-party logistics partner. However, the additional cost has presented more of a challenge financially, compared to large companies. Nevertheless, the extra cost was largely viewed to be a

necessary expenditure to avoid delays and lost loads, which are more damaging to business.

"We created a new admin role just to deal with the Brexit paperwork."

Small private carrier

"We've had to outsource to a logistics agency to deal with the legal perspective and documentation for crossings. We had to resort to that because you'd do a crossing and then a day later, same lorry, same weight of load, same time, and you'd be told you needed all these different forms; we were left with no choice but to outsource for help with that."

Medium freight forwarder

Hiring new administrative staff or outsourcing customs paperwork to third parties was reported to have increased costs for some in our sample, but has not always been effective in helping them to avoid delays. Some haulage managers reported experiencing further delays as a result of incorrectly filled out paperwork.

"I had a driver in Poland, and he was stuck there for three days, because the company who did the paperwork for us mistook a three for an eight. We're losing between one and a half to two loads a month, it is having a dramatic effect on the overall turnover."

Small freight forwarder

A long-term impact of EU exit has been to encourage the hauliers in our sample to use alternative crossings, as they try to avoid disruption. Disruption around Dover especially and a perception that certain ports or countries have more stringent checks have encouraged many of the haulage managers interviewed, to consider alternative crossings into the EU.

"I only go into Holland now... Holland is the most relaxed entry point into Europe."

Small freight forwarder

Haulage managers told us that route planning has also been affected by the return of many drivers to the EU. There was a perception amongst those in our sample that the added complexity of crossing into the UK, and the risk of significant delays, has meant that for many EU resident drivers, it is not worth accepting the risk. Instead, haulage managers reported, these EU resident drivers work exclusively in the EU and leave UK drivers to make the journey across.

"The drivers have gone back to Europe and that's caused a lack of drivers in the UK, which has obviously had an impact on us. There's equipment, but there's no drivers."

Small freight forwarder

“A driver could come here and be stuck for three days waiting for clearance. He doesn’t get paid for those three days and he doesn’t get his other load that’s going back. So a lot of the drivers from Europe are going, I’ll just stick to mainland Europe, it’s a lot easier for me.”

Small freight forwarder

Haulage managers also reported a general reduction in EU trade. Many believed this to be a direct result of EU exit making it more complicated to cross into and out of the UK. The perception is that EU based companies are reluctant to send their fleets over to the UK where they are likely to experience delays, and they are also reluctant to buy from UK suppliers who may not be able to make delivery times, creating a general decrease in import and export.

“Nobody’s buying from the UK as much as they used to be. We’ve got delays on freight because they’ve changed the process again for getting freight through.”

Large freight forwarder

5.3 The impact of COVID-19 on route planning

Summary: *COVID-19 had a significant impact on haulage managers’ experiences. A reduction in ferry services, driver shortages and increased port administration have all impacted their route planning behaviour and, in some cases, led to the temporary closure of their businesses.*

Initially the impact was reported to be largely negative, with many companies having to reduce or, in some cases, even temporarily stop business. Driver shortages, due to illness or an inability to travel because of COVID-19 restrictions, were perceived to have had a large impact, particularly on small and medium sized companies.

“It had a huge impact on us to start with. We actually lost 10 drivers, and because of that we couldn’t sustain the lorries.”

Medium freight forwarder

Driver shortages were compounded by disrupted travel and reduced services at ports, increasing the complexity of route planning for hauliers, and the chance of delays and disruption around ports such as Dover. Haulage managers were required to review their usual routes, explore alternative crossings or risk reducing their service. The resources available to large companies (their planning teams and/or route optimising technology) made this transition largely manageable. However, for small or medium companies without this capacity, this challenge placed an increased strain on their resources.

"The biggest decision-making we had was when the ferry companies reduced their services. So we had to sort of look at who was going when, and it might have been that they were only going once a day, rather than twice a day"

Small freight forwarder

In the short term, supply chain issues and less customer demand, in addition to the increased perceived challenge of shipping to the EU, meant that many companies felt the need to shift their business focus, in some cases choosing to concentrate on the UK market.

"It was just like the demand was gone. Partially because of supply chain issues and also because of so many customers getting covid. Only now am I getting back to where I was."

Small private carrier

"We weren't getting abroad very much. We weren't really sending much, customers weren't sending much, so the bulk of our work became UK based throughout that lockdown period."

Large freight forwarder

With fewer vehicles able to travel through ports, a number of companies reported that they chose to send small loads (often with third party hires or in a load sharing arrangement) as frequently as possible, rather than waiting to fill up (their own) larger vehicle. The idea behind this was that it would maximise the opportunity for goods to get through to end-customers compared with risking all their goods on a single lorry being delayed. The agility of small companies regarding route planning was reported to be a real asset during this period. Small freight forwarders and private carriers were able to adapt their business to suit the change in demand by sending small loads, such as online orders, in shared third-party vehicles.

"We started to sell on [an online marketplace] and used third parties to take small boxes, instead of whole trucks of goods."

Small private carrier

Of the companies we spoke to, large companies, specifically private carriers, had more resilience to the initial impact of COVID-19 with most managing to continue business, even if at a reduced rate, whilst some reported experiencing growth in their internal market.

"Certainly the second part of covid, those financial years were our best financial years ever since trading."

Large private carrier

Some medium sized companies interviewed, especially freight forwarders, were hardest hit as they were least able to flex their business in the way smaller companies could but did not have the built-in resilience of the larger companies. Medium freight forwarders were particularly affected as many large companies were running at a reduced capacity, reducing their need to outsource to third parties such as freight forwarders. As a result many medium freight forwarders saw a reduction in demand from their clients at larger firms.

“We just managed to keep on going. We were running at a loss for I would probably say about six months.”

Medium freight forwarder

“Some clients decided not to use transport companies anymore and to do things their own way.”

Medium freight forwarder

The COVID-19 self-isolation period also created staffing problems for a number of the hauliers in our sample, with many reporting long periods of absences in the early months of the pandemic. Haulage managers reported high rates of infection amongst their drivers, exacerbated by frequent testing and resulting in a reoccurring need to isolate. The impact of COVID-19 sick leave was felt particularly by the small and medium sized companies in our sample, who had fewer staff and drivers to fall back on in the case of absence. Some small companies reported that they were forced to close during these periods of extended staff or driver absence, however as they were more likely to use only freelance drivers the financial implications were manageable. Some medium companies, with a larger number of salaried staff and drivers, did not have the option to close and had to absorb the financial impact of running at reduced capacity without a proportionate reduction in overheads. Large companies, many of which also had reduced activity, had a greater buffer, due to the scale of their finances and resources, to absorb these costs.

“Initially about 50% of the company was furloughed, then there was a big period where up to half of staff were off work at a time because they were isolating.”

Medium private carrier

“We had a wave of Covid where probably 70% of our driver fleet were hit with it at the same time. It kind of brought the company to a standstill for the 10 days that people were off.”

Medium freight forwarder

The longer-term impact of COVID-19 reported by the haulage managers in our sample has been largely felt in relation to travel restrictions and vaccinations, adding paperwork and

causing delays and disruption at ports. Large companies have been better positioned to absorb this, as their large planning teams can take on extra paperwork whilst staying on top of restrictions as they change, to ensure that drivers travel smoothly. However, medium and small companies have struggled to stay up to date on the constantly shifting restrictions in both the EU and UK, with many reporting issues with drivers being ineligible to travel or even becoming trapped abroad as requirements changed.

“My driver was stuck in Poland, so for around 8 months we were shut.”

Small freight forwarder

The variance in testing and vaccination requirements across the EU was a source of concern for haulage managers in our sample, as the quickly shifting requirements and variation between countries added significantly to the complexity of route planning. Many reported difficulties in ensuring that their drivers understood and were up to date with the necessary travel requirements, and some reported adding in additional buffer time to their journeys to account for testing. Reported mistakes, either through driver error or at a managerial level, had significant knock-on effects on profit margins for many companies.

“We had a lot of issues with regards to our drivers and understanding what they needed to have in terms of vaccinations and tests.”

Medium freight forwarder

“We had to build in extra time for testing, then if you're delayed two or three days that's your profit margin gone.”

Medium freight forwarder

Driver hesitancy surrounding COVID-19 testing, and a general desire to avoid infection, also reportedly deterred many drivers, especially those based in the EU, from taking on longer journeys (such as crossing into the UK). In some cases, haulage managers reported drivers turning down journeys which would require them to test, in order to avoid the risk of isolation, whilst others reported focusing on local business in order to protect their drivers' welfare. Vaccine hesitancy was not specifically mentioned as an issue by the haulage managers in our sample, suggesting that the main challenge stemmed from keeping drivers' vaccination statuses up to date to meet changing requirements, rather than from a reluctance amongst drivers to get vaccinated.

“During the pandemic we wanted to keep drivers local, we weren't keen on going far for the welfare of the staff.”

Medium freight forwarder

“A lot of drivers are scared to go get tested, especially the Europeans, because if they go get tested, they then have to isolate for seven days, and it means that they lose seven days' worth of money.”

Medium freight forwarder

Two years on, the haulage managers interviewed felt that supply chains remain disrupted. Disruption at ports like Shanghai, which was under a strict lockdown during the fieldwork period, meant long delays in receiving goods and raw materials. The ongoing supply chain issues have increased costs for the hauliers in our sample. Some hauliers reported having to make staff cuts; a few have even considered giving up their fleets to cope.

"There was a lack of raw material from the Far East and that short supplied everywhere. It forced a lot of UK companies into cutting their staff, cutting their working hours. It changed how they operated. Obviously, with cost of everything going up, they're trying to cut back again, now there's a part of China going back into lockdown."

Large private carrier

"Initially we thought shall we get rid of our trucks and drivers? But then we lose control. If we maintain our own fleet, we are more flexible rather than being at the mercy of freight forwarders."

Small private carrier

6. Identifying and exploring the factors that affect haulage companies' decisions to use particular crossings/ports

6.1 Exploring decision-making around port and crossing choice

Summary: *Decision-making surrounding crossing choice amongst the haulage managers in our sample was similar to that for route planning. The decision-making process often begins by considering the start point and the final destination. Factors such as cost, crossing time and general time efficiency are then taken into consideration.*

A company's location was found to play a large role in crossing choice. This was predominantly seen when comparing the crossing choices of companies based in the North of England or Scotland when compared to those based in the South, with the North-based companies more frequently utilising northern ports than their southern counterparts.

"We tend to go out of Newcastle or occasionally Hull, occasionally Portsmouth if we're going to France."

Large private carrier (based in Scotland)

The destination was also a significant factor of crossing choice. For UK companies delivering to the EU, in which the second leg is the longer section of the journey, the point of arrival after crossing is a key determinant of route and journey time. Many of the haulage managers in our sample reported choosing crossings based on destination. For example, when delivering to France or Spain, Dover to Calais or Portsmouth to Le Havre were common choices. For those transporting to the Netherlands or Germany, Newcastle to Amsterdam or Harwich to Hook of Holland might be preferred.

"There are a couple of routes we take where we don't go through France, because the final destination is not France. For example, we've gone from Portsmouth to get to Spain and from Newcastle, you can get to the Netherlands."

Medium freight forwarder

Ports and crossings, either UK or EU, may also be considered for their perceived efficiency at onboarding freight. As avoiding congestion around ports was a key factor for many of the hauliers in our sample, choosing a port least likely to experience delays and disruption was cited as essential. Some haulage managers reported preferring ports that they perceived to process paperwork quickly and avoiding those perceived to take longer.

“We have a list of pedantic ports which take longer to process. Even if all the paperwork is there and correct, they still take ages to go through everything.”

Small private carrier

The speed of crossing was also frequently cited by those in our sample as a deciding factor when considering which crossing to use. Haulage managers reported looking for the most time efficient crossings into the EU, considering factors such as actual crossing time and the regularity of service. However, this factor may sometimes be compromised in favour of cost efficiency, which was also frequently mentioned as a key factor in decision-making.

“For us it's mainly just knowing that the service is available, that you can book and there's not a queue to get on. It's all about speed.”

Medium freight forwarder

“We've put a couple of loads on from Harwich going to the Hook of Holland, but the problem with those boats is that they are very expensive, so on top of fuel costs it's a lot.”

Medium freight forwarder

The Short Strait crossings (both Dover to Calais and Folkestone to Coquelles) were considered to be the ‘default’ crossings to the EU by many of the haulage managers in our sample, with the vast majority stating they had utilised the crossing either recently or historically. The Short Strait is preferred predominantly for location, regularity of service and quick crossing time. Dover is perceived to be cheaper than other UK ports, which for some justified the extra expense in fuel needed to travel there, rather than using a closer port. The Channel Tunnel (operated by Eurotunnel) at nearby Folkestone was preferred by some companies, for example those transporting fresh goods.

“We often go by Dover, it's very well organised and it's quite efficient.”

Medium freight forwarder

“We typically go down to Dover because that is the quickest, easiest route for a driver to drive down there and then ferry across. We've looked at Harwich but it just doesn't quite

seem to fit for us. If the timings of the ferries were a lot better, we might consider other routes then."

Large freight forwarder

"Let's be realistic, if you're down south, everything goes from Dover. There's no two ways about it, you're either coming out of the channel tunnel or off the ferry in Calais."

Medium freight forwarder

6.2 The impact of disruption at ports and crossings

Summary: *Disruption at UK (and EU) ports has created challenges and concerns for the haulage managers in our sample, leading them, in some instances, to use alternative crossings either ad hoc or on a more permanent basis. Dover was singled out particularly as a port which has been heavily disrupted, creating challenges for many haulage managers who rely on what is often the default crossing, due to location, speed, service frequency and cost.*

The most frequently referenced challenge experienced by haulage managers when planning their crossings was the increasing unpredictability of journey times due to delays and disruption. Disruption at and around UK ports, perceived to have been caused by EU exit, COVID-19 restrictions and more recently a large ferry company's crew cuts and service suspension, was reported to be a significant challenge for the hauliers we spoke to when shipping to the EU.

"Pre-Brexit, we would be mostly using the channel tunnel, it was very time effective, and also cost effective as well. They'd run so frequently, it was great. Since Brexit it's got a little bit difficult. Now when we're going to Europe, we use agents."

Medium freight forwarder

"The unexpected delays, that is the biggest challenge. We've got somewhere to be at certain time and while we can plan for most eventualities, we can't plan for a vehicle fire on the motorway. We can't plan for excessive times at ports. We consider a couple of hours, three or four hours to get through. If that ends up being two days, that's the biggest challenge."

Large freight forwarder

"It's become a game of chance."

Medium private carrier

Haulage managers reported experiencing multiple day delays, with some reporting delays of over a week. The impact was felt across the sector; private carriers experienced problems in shipping their goods and freight forwarders noticed a reduction in business. In some cases the impact was also felt by customers who received goods late or not at all.

"We had a driver stuck near Dover for 28 hours. We lost all revenue, we recalled it and ended up sending it by air freight. It was a huge loss."

Small private carrier

"The delays were less than a week for our vehicles but in our world that's a month - a day or two late is an issue because you've got a construction site waiting on these products and men standing around waiting for them."

Medium private carrier

"You've got expiry dates; you've got shelf life. So the longer they're stuck at the port, the less shelf life they've got when they reach the destination, which will obviously affect the price."

Small freight forwarder

"Short term disruptions can have long term impact - if you can't guarantee an arrival time that's bad service. Every week delay reduces our sales by about 1-2% which is huge."

Large private carrier

In situations where unexpected disruption had occurred, most small and some medium sized companies in the sample were able to respond quickly in real time (e.g. as soon as a driver became aware), either because individual drivers were empowered to make decisions en route or because they only needed to consult a single decision maker.

Once caught in the midst of disruption, whilst it may be possible to re-route to some extent, it is reportedly often not possible to take significant action such as changing a crossing. In the research, examples of small companies taking innovative action to be more flexible in their real-time responsiveness were mentioned, such as giving drivers printers so that they could print new paperwork and can re-route to a different crossing, but this was not reported as widespread.

"You have to give the drivers some responsibility to make the right choice en route, I don't particularly want to be rung at three o'clock in the morning asking what they should do. So we have to be quite flexible."

Medium private carrier

Large companies were, as discussed, more likely to have centralised processes and decision making which could, in some cases mean that their real-time response to unexpected disruption is slightly slower than small/medium sized companies (e.g. because information needs to be fed back to and processed by the transport planning office). However, some mentioned being able to re-route other vehicles based on feedback from drivers or other information sources on disruption, including re-routing to different crossings if necessary or feasible, enabling flexibility in temporary route planning and crossing choice. Some larger companies said they have arrangements in place e.g. to easily buy

tickets for alternative crossings, and so can respond effectively in real time to minimise impact on their business.

“We have consistency of loads so if one gets stuck, the next one goes via Rotterdam and not via Calais”

Large private carrier

Interestingly, some medium sized companies in our research sample, described lacking both the agility of smaller companies and the more significant resources of larger companies. This impacted their ability to respond in real time to unexpected disruption (because they did not necessarily empower their drivers to make decisions) and also limited their temporary flexibility in relation to route planning and crossing choice (e.g. because they did not have multiple vehicles on the road who could be re-routed).

Congestion around Dover was the main source of disruption mentioned by the hauliers in the sample. The disruption perceived to have been caused at Dover by EU exit, COVID-19, and latterly a large ferry company’s crew cuts and service suspension, were front of mind. Many of the haulage managers we spoke to mentioned becoming involved in disruption at Dover at some point over the last two years or needing to put in contingency measures if required.

“When Brexit came in, what was the busiest port that had 15 miles of trucks just parked up? It was Dover because that is the most popular route.”

Medium freight forwarder

“We try to avoid Dover since about a year ago when there were the mile-long queues.”

Medium freight forwarder

6.3 Changes in choice of ports and crossings

Summary: *Although Dover was still perceived by some to be the most efficient way to cross into the EU, the disruption of the last two years has challenged this perception. Significant delays, congestion and disruption around Dover in particular has encouraged some hauliers to use alternative ports, either by increasing their use of a secondary port or finding a new alternative route.*

Many of the companies we spoke to stated that they had traditionally used the Short Strait crossings as their primary entry in the EU, also making use of secondary or alternative ports occasionally. But some of those who used the Short Strait crossings regularly reported increasing their use of these alternative ports, or seeking out new alternative options, over the last two years. The main reasons cited for this change were congestion around the Dover area, delays caused by COVID-19 restrictions or new customs regulations or, more recently, disruption caused by a large ferry company’s crew cuts and service suspension.

"We looked at Portsmouth more during Covid as Felixstowe and Dover were so congested."

Small private carrier

"I'd say for me, the routes haven't changed. They just became busier because they enforce all the customs paperwork. [A large ferry company's crew cuts] is the most recent one. Has it caused me any problems? No, because we still have the Channel Tunnel. It just makes it harder to get yourself booked on to the train."

Medium freight forwarder

Hauliers that were already using a variety of ports stated that they were most resilient to disruption, as a backup option was already in place and transport managers and drivers were already aware of the ports arrangements.

"We managed to eliminate a lot of the problems because we have the Rotterdam route which wasn't a P&O route. We're probably quite lucky that we have that route not so far off our general driving route."

Medium freight forwarder

Small to medium freight forwarders and private carriers in our sample were most likely to have used or considered an alternative port, with Portsmouth, Newhaven, Felixstowe, Harwich and Hull most frequently mentioned. Due to the ad hoc route planning of these small companies the switch to these ports was not permanent or fixed, as many indicated they will still use Dover when required. Instead, these secondary ports act as useful alternatives, to be used to avoid disruption or when aligned with the other decision-making factors. For example, instead of using Dover as the default, Harwich may be used when delivering to Germany or Poland to avoid driving through France. Equally Portsmouth may be a useful option when collecting goods from the South West of England.

"Dover is generally the best route in terms of, say the frequency of service, but the recent [large ferry company] episode has severely impacted us. We have consistent loads coming out of our factory so if one gets stuck, the next one goes via a different route."

Medium freight forwarder

Large companies based in the North of England or Scotland were the most likely to have made a long term change of crossing. These companies have, in some cases, switched their default crossing from Dover to ports such as Newcastle and Hull, quoting the recent disruption around Dover, as well as the increased cost of fuel as the main reasons for this change. As fuel prices have increased, so has the cost of transporting loads down the country to Dover, cancelling out the cheaper fare to cross to Calais and justifying the more expensive crossing at Hull. The extra crossing time is made up for by the time saved not

driving South. This cost-benefit analysis has meant more permanent and long term changes in behaviour for these northern based companies.

“If you ship from Hull, your ferry crossing is hugely expensive. So you're looking at that and factoring in the 12-hour crossing time vs the drive down to Dover to cross the quickest, cheapest way. It's much of a muchness now, because of the fuel nowadays.”

Large private carrier

“Because of the [large ferry company] delays and issues any northern shipments we now ship out of Hull. If you've got a shipment from Yorkshire, there's no point sending it down to Dover because what you may make up in crossing time, you'd use up in transit time down to Dover.”

Large freight forwarder

7. Understanding the contingency plans that haulage companies have in place for future challenges and disruption

7.1 How haulage managers mitigate and adapt to challenges

Summary: *In addition to using alternative ports and crossings, the haulage managers in our sample reported a variety of contingency plans to deal with future challenges and disruption. These included increased pre-planning, allowing for extra 'buffer time', and factoring in cost increases to cover longer, more disrupted journeys. Haulage managers reported building up their administration teams to be able to handle the additional requirements related to customs and setting up informal communication channels to share up-to-date information with other drivers and hauliers.*

Disruption is a constant in the haulage sector, but recent years have reportedly required unprecedented adaptation. To adapt to challenges haulage managers do as much pre-planning as possible. Carefully planning a route that is free of disruption and is as fuel efficient as possible has become essential, together with ensuring that each leg of the journey is profitable. Staying up to date on UK and EU customs regulations and abreast of news of any disruption has also become key. This appears to have placed large companies, with transport management teams and route optimisation technology, at a particular advantage over medium or small companies without such resources. To stay competitive, companies without these resources have adopted a range of behaviours that allow them to flex and adapt to changing circumstances.

Small and medium companies reported a range of behaviours that help them adapt and deal with increased fuel costs. These included maximising cargo space, collecting and sending unaccompanied loads, and other journey-minimising practices such as load sharing and loading. Sending and collecting unaccompanied loads (LoLo) was reported to be an effective cost saving behaviour for tackling the imbalance in trade.

"If speed is not so needed and we don't have a full lorry load, then we can find a slot that someone is desperate to fill if they're already going across. Sometimes we drop the trailer at a port and then we'll have another vehicle on the other side pick it up."

Medium freight forwarder

“The whole of Scandinavia is a shipped unaccompanied for us. A lot of this comes to do with the imbalance of trade.”

Large private carrier

Load sharing has seen a similar increase in its prevalence; even companies with large fleets discussed using third party hauliers or sending loads with other companies to minimise journeys. Instead of risking a vehicle getting caught up in disruption with a small or partial load, and instead of waiting to fill a large vehicle, small loads can be sent with a third-party haulier. This behaviour was found to be particularly common amongst small freight forwarders, who have relationships and networks with each other to allow this kind of sharing.

Ensuring that a driver is collecting a backload, wherever possible, was also found to be an essential part of route planning. Haulage managers communicate, typically through informal channels (such as instant messaging services), about the location and destination of their drivers and vehicles, and collect goods for each other, to ensure that as many journeys as possible are paid for.

“If anything is urgent you now have to send it in smaller vans. There are so many vans going over instead of the bigger trucks.”

Small freight forwarder

However, new load sharing behaviours are not without their risks. Some of the haulage managers in our sample reported experiencing issues when sharing vehicles with multiple other businesses. As all the goods need their own customs documents, shared vehicles were perceived to sometimes add to the delays experienced at ports and crossings.

“The risk is, if there’s a shipment with 40 other people’s stuff on there and one person not done their documentation correctly, it can hold the whole thing up”

Small Freight forwarder

Recent disruption has also changed pre-existing processes for hiring third-party hauliers and broken down established booking procedures. We heard that bookings are now made more last minute and are harder to secure. This has put companies using third-party hauliers or sub-contractors at a disadvantage as they are more vulnerable to increasing rates and are therefore more likely to have to absorb costs as their contractors/partners increase their prices.

“We used to have a set process, now it’s about just scrambling through the market who’s got space who’s got the best rates, who’s got the best transit time, who’s got the equipment. So it’s a bit of a scramble at the moment, there’s no stable process.”

Small freight forwarder

Longer-term resilience to disruption has included factoring in extra 'buffer time', especially at crossing points. Haulage managers reported adding hours or, at the height of disruption, days, onto journey times to allow for slow customs lines or congestion. However, with such tight margins, this buffer time can drive up the costs and is not always effective in the case of significant delays.

"We try and factor in three hours buffer time on top. But sometimes it doesn't work because of loads of traffic accidents or road closures."

Large freight forwarder

"We try and give some leeway to the drivers, just in case unforeseen circumstances occur, then they can still get to the destination on time."

Large freight forwarder

One way that the hauliers in our sample reported to try to combat delays at customs has been to restructure their planning teams or take on new administrative staff to cope with increased documentation. However, even those who could not afford to hire additional staff reported finding innovative ways to adapt, including installing printers in vehicles so drivers are able to print new documentation in case of error or route changes.

"The vehicles now have printers in them so that drivers can print new documents once they've already set off, because we've had so many times when rules and regulations changed."

Small private carrier

Large companies reported a greater degree of resilience to disruption than the small or medium companies in our sample. As large companies have multiple vehicles on the road, for example, they are able to feed information about disruption back to the centralised transport management team; the team are then able to re-route following vehicles or inform customers to manage their expectations. Smaller companies, without these resources and with only a small number of vehicles on the road, rely on their ability to make ad hoc route changes as needed. However, for companies of any size, this flexibility in real time responsiveness is contingent on hearing about disruption early. Once a vehicle is stuck in traffic or at a port it is reportedly not often possible to make changes to the route.

"We are constantly following updates. We follow the news. We've planned what we think is a reasonable time to get through a port."

Large freight forwarder

Informal communication channels were considered the most reliable source to hear about disruption. Word-of-mouth communication between drivers and haulage companies was key for many of the haulage managers in our sample when hearing about disruption at ports or along routes. Instant messaging services were frequently referenced. However, third-party sources such as the AA, RAC, and hauliers' websites and newsletters, were also mentioned. Government sources of information were not generally preferred and were perceived to be incomplete or unreliable.

"Word of mouth with other business, they are my first point of contact."

Small freight forwarder

"We have a [instant messaging] channel for our driver, which works quite well, we also have a number of [social media] groups with drivers from different companies. The informal channels are far more valuable and reliable than any Government provided channel."

Medium freight forwarder

To cope with the shortage of drivers, many haulage companies said they had raised driver wages, with some reportedly giving pay rises of between 18% and 30% to their drivers in the last two years. Large companies with their own fleet and contracted drivers also discussed prioritising drivers' working conditions to ensure retention. This included booking rest stops with secure parking and better facilities for the drivers when staying overnight.

"If you want a driver, all of a sudden you have to pay maybe 30% more than what you were paying them 12 months ago."

Medium freight forwarder

"The facilities for drivers are terrible. We've been and had a look and complained, but it needs a government body to get involved. Drivers are specialised in what they do, I wouldn't class it as an unskilled job."

Large freight forwarder

As the cost of haulage has increased, many haulage companies have had to transfer costs to their customers through increasing their prices. The large companies in our sample reported that they have largely been able to absorb the increased costs associated with disruption. However, small and medium companies reported more frequently that they have had to increase their quotes or prices, which has affected their customer relationships. Communicating effectively and promptly with customers was repeatedly mentioned as being the best way to manage this increase. This customer/haulier relationship was also mentioned as a crucial way of building resilience to delays and disruption e.g. by informing customers to manage their expectations and avoid late fees.

"We try to absorb some of it, so there's not as much of a jump for our customers."

Medium freight forwarder

“We’ve communicated with our clients about rising costs, who have so far been sympathetic. Our larger clients in the UK, they understand. But how long we can keep going back to them and saying look, there’s this fuel surcharge, or there’s this raw material surcharge, or there’s this energy surcharge.”

Large private carrier

8. Identifying and exploring perceived opportunities and needs of the UK haulage industry

8.1 Opportunities for the UK haulage industry

Summary: *Although many haulage managers in the sample were focused predominantly on potential future challenges to their businesses, some identified opportunities. These included building new relationships with EU based companies, increased load sharing and backloading, utilising the knowledge and experience gained during the recent past, attracting new and younger drivers through training and improved working conditions and technological innovations to improve efficiency and sustainability in the industry.*

Although haulage managers focused on challenges they faced, many formed views of future opportunities. The following opportunities were mentioned:

- An opportunity to build relationships with EU companies through increasing collaboration between UK and EU hauliers and wholesalers, for example by reducing the need for vehicle crossings through load sharing or by sending unaccompanied loads.
- New trading conditions could provide an opportunity for UK hauliers to pick up the bulk of UK/EU import and export.
- A niche has been created for haulage companies that understand new regulations and are able to handle the increased complexity in logistics. Some companies also enjoyed business growth during the pandemic and are now in a position to capitalise on that growth/momentum.
- Larger and more established haulage companies can provide resilience and business continuity, reversing what they see as the previous trend favouring small scale and freelance freight forwarders. Many have increased their administrative departments to build resilience to the perceived increase in customs paperwork.
- Technological breakthroughs, such as hybrid and electric vehicles could build resilience to rising fuel costs and improve public perception of the haulage industry. Increasingly effective transport management systems could also help by improving route planning.
- The increased demand for drivers has pushed up wages and working standards, which may also attract younger, UK based drivers to the industry.

- A reduction in congestion around Dover as hauliers employ a wider variety of routes and crossings.
- A general but pragmatic/cautious optimism for the future: there is a sense that the industry has risen to the challenges of the last few years by providing new services and finding new ways of working, an adaptability which situates the sector well to face future challenges.

8.2 Key support needs identified by haulage managers

Summary: *When asked what might help them in future, haulage managers mentioned a range of things, including improvements in communication between the Government and industry on any future regulation changes, streamlining of customs processes where possible, support for improving conditions for drivers, and interventions to improve driver shortages, including development of training schemes such as apprenticeships.*

The most frequent request from haulage managers, when asked what support they would like to receive, was for a streamlining of the customs procedure. Some asked for a return to simpler procedures or to ‘make it how it used to be’, others want to see a reduction in customs charges to help manage rising costs.

“I think an ideal scenario would be like having an app, for example for drivers to be able to do all the checks and forms on the app itself. So when they get to the UK ports, they can just show the app itself, and then all the documents will be there. Even a QR code and they can scan it, and then you can just go through.”

Large freight forwarder

Secondary to simplifying the customs procedure was a request for clearer information on what is required both to enter and exit the UK and to cross into each EU country. Another frequent request was for a formal communication channel, potentially Government supported/run, to report disruption on roads and at ports and act as a ‘one stop shop’ for haulage managers when route planning.

“More communication. The communication they placed out there wasn’t as user friendly as it could have been. You go on any government website; you try and interpret it. Put it into layman’s terms, that’s what we want. Bullet point it if you have to.”

Medium freight forwarder

Improving working conditions for drivers was front-of-mind for many of the haulage managers in our sample. Some suggested training schemes and apprenticeships for drivers to encourage more UK-based young people into the sector. Some also suggested tackling driver shortages through making it easier for EU drivers to enter and work within the UK or creating incentives to encourage younger drivers into the industry.

“I do feel that new drivers need to come on board, which they’re trying to do. But it’s going to take an awful lot of time, because the average driver’s age is like 55.”

Medium private carrier

“I think if some of the legislation could be changed a little bit in terms of those drivers having to go back to their origin country for one week, every month. As I've said, a lot of our drivers are Polish so if the government could look at that legislation a little bit more to make it a little bit easier.”

Large private carrier

Finally, a wish expressed by many haulage managers was for action to address fuel prices, including, for example, Government intervention to help the industry cope with the rising cost of fuel.

“We need some sort of support when it comes to the fuel prices. I mean, we're touching nearly two pounds a litre now. We can't keep going at that.”

Medium freight forwarder

“The government is not really doing anything [about the increased cost of fuel] even from a transport perspective. The transport companies can't sustain these costs, which means they will be passed onto the customer in manufacturing and products, and they then pass that to the end customer, which is us.”

Large freight forwarder

9. Conclusions and implications

9.1 Key conclusions from the research

The last two years have been challenging for the UK haulage sector, but the natural flexibility of the industry has meant that the companies interviewed have adapted to meet the challenges and opportunities presented.

Whilst all companies interviewed have shown a degree of flexibility across all types (either temporary and/or long term) in their route planning, larger companies seem to have more resilience to future changes and disruption having 'geared up' for adaptation. Thus, medium sized and smaller operators might welcome more practical support in responding to future uncertainty.

Flexibility in route planning extended to changes in ports and crossings with circumstances such as disruption around ports, driving some companies to try alternatives. However, the change has not always been permanent, but simply a reaction to what is seen as a temporary situation. For large companies, especially those based in the North of England or Scotland, the changes in crossing seem more likely to be permanent, as haulage managers have found those crossings offer comparable speed and value for money.

It is also important to note that as fuel costs continue to be high, the cost-benefit calculation around use of 'usual ports' (especially in the South of England) becomes more uncertain for haulage managers looking at the total cost of journeys, balanced against speed/time/other factors such as driver or customer requirements.

When it comes to looking to the future, haulage managers are looking for support to make the most of the opportunities emerging from new trading arrangements. Simplification of regulation and/or early communication of changes alongside measures to help with rising fuel costs, disruption around ports and driver shortages, were all called for.

9.2 Key implications

This research was not designed to test or generate potential interventions or actions, but it is possible to outline some general implications.

Haulage managers reported that historically they had felt that they are not always fully consulted on changes that impact their roles and businesses. Therefore, future

consultation on key areas for the sector (e.g. customs arrangements) could help create trust that the industry's needs are being considered when making policy, bolster business confidence and foster an opportunity mindset when considering their future planning.

Measures to support small and medium sized businesses to investigate and adopt the technology and systems/processes that larger companies benefit from might enhance productivity and could have a positive impact on their resilience and flexibility in the future.

Continued efforts to make the haulage sector (and driving as a career) as attractive as possible, such as training schemes and apprenticeships, improved facilities at rest stops and services or career initiatives, could aid recruitment and retention.

Proactive management of peak periods to ensure that routes are clear of avoidable disruption could improve journey times for hauliers. Early and clear notice of disruption e.g. through social media, with practical alternatives for drivers to take can help ensure drivers, particularly of smaller businesses, make the best possible route crossing plans as soon as it happens.

Most of the influences on haulage managers' behaviour are habitual, related to geographical location or a response to macro environmental factors such as the COVID-19 pandemic and EU exit. Therefore, creating interventions to support flexibility and resilience will remain challenging.

Appendix

10.1 Sample Breakdown

Table 2: Business location

Business Location	Private Carriers	Freight Forwarders
London	3	4
South East	0	4
South West	1	3
East of England	0	1
Midlands	1	1
North West	1	1
North East	0	1
Scotland	1	1
Wales	2	2
Total	9	18

Table 3: Good type transported

Good Type (some companies carry more than one category of goods)	Number of companies
Commercial goods	5
Frozen food	4
Palletised	3
Fresh food	3

Planning Routes and Crossings in the UK Haulage Sector in 2022

Pharmaceutical	2
Removals	2
Aerospace	2
Cargo & freight	2
Industrial	1
Machinery	1
IT products	1
Technology	1
Clothing	1
Medical	1
Military	1
Furniture	1
Retail	1
Music equipment	1
Catering supplies	1
Stage equipment	1
Scaffolding	1
Manufacturing	1
Textiles	1
Electrical components	1

Table 4: EU countries delivered to/from

EU Country	Number of companies
Germany	12
France	10

Planning Routes and Crossings in the UK Haulage Sector in 2022

Netherlands	9
Spain	8
Italy	7
Poland	5
Portugal	4
Belgium	3
Romania	2
Ireland	2
Portugal	1
Bulgaria	1
Denmark	1
Slovakia	1

Table 5: UK ports and crossings used

Crossing	Number of companies
Dover	23
Folkestone (Channel Tunnel)	5
Portsmouth	5
Hull	4
Felixstowe	4
Harwich	3
Newcastle	2
Thames Port	1
Liverpool	1
Southampton	1
Tilbury	1
Holyhead	1

10.2 Discussion Guide

Section	Key discussion points and probes	Time
Section 1: Introduction	<p>Hello, my name is [XXX] and I'm a researcher from an independent research agency called BritainThinks. Explain purpose of the session:</p> <p>Thank you for making the time to take part in this research, which is all about how haulage companies plan routes and crossings, along with your opinion of the challenges and opportunities the industry faces.</p> <p>Explain terms of the session:</p> <p>We're an independent research agency so I'm here to listen to your honest views and opinions; there are no right or wrong answers.</p> <p>We abide by the Market Research Society code of conduct. This means that everything you say today will be completely confidential. We like to use quotes in our reports to illustrate certain findings – but these quotes will always be anonymised, so you won't be personally identifiable.</p> <p>The only exception is if you were saying something that gives me reason to think you or someone else is at risk of harm, we may be legally obliged to pass this information to the relevant authorities.</p> <p>BritainThinks will hold your name and contact information for up to 12 months for quality monitoring purposes only and will not pass on any personal data to any third party.</p> <p>You can opt out of the research at any time (although you may forfeit your right to any incentive/benefit).</p> <p>We'll be talking for 45 minutes – finishing up at [XXX]. I have several questions to get through so, to finish on time, I may need to interrupt you or move the conversation on.</p> <p>I am planning to record this session for notetaking and analysis purposes, so I don't need to write down everything you say. Is that ok? [get confirmation]</p> <p>The recording and all other data will be stored on BritainThinks servers and be securely deleted 12 months after the project ends.</p> <p>Before we start, it would be great if we could quickly get acquainted! Please could you tell us:</p> <p>Your name</p> <p>The company you work for and your role</p> <p>A little bit about the company's operations – what type of business, what sectors it serves, size, type of fleet/vehicles, locations/countries you operate in, how many hauliers are employed, what the main ports they use are (and how often) etc.</p>	5 mins (5 mins)
Section 2: Route planning decision making process	<p>We'd like to understand how haulage companies plan routes, and any changes in your decision-making processes since the UK's exit from the EU and since the pandemic</p> <p>Could you outline the process(es) you go through when deciding which routes your vehicles will take and which crossings/ports you would use for a given journey? Moderator to probe on the following:</p> <p>Is there a set, formal process or is it more ad hoc</p> <p>What are the stages in the decision/process</p> <p>How long in advance do you plan</p> <p>Who else is involved (and role of UK vs. international stakeholders) – where are decisions made – UK or in another country (e.g. overseas head office)</p> <p>What influences the options they consider (e.g. contracts, or other scoping factors)</p> <p>What role, if any, the driver plays in deciding routes (and autonomy for re-routing during disruption)</p> <p>To what extent rest-stops, petrol refills and overnight stops at parking facilities are planned in advance, and how much influence these factors have on the route chosen</p> <p>What internal or external information, services, systems or software do you use</p> <p>What factors drive and impact your decision making?</p> <p>How are the choices of ports, crossings, routes you use impacted by:</p> <p>Customer requirements</p> <p>Types of goods being transported</p> <p>Costs and time (including queuing/waiting time)</p> <p>What other factors influence your choice of port/crossing</p> <p>Have you ever considered, or would you consider any other route(s) than your usual ones? Why/why not?</p> <p>How, if at all, has this changed since/as a result of the exit from the EU?</p> <p>Have the crossing options you consider changed?</p> <p>Which changes have impacted your decision-making processes most</p>	20 mins (25 mins)

Planning Routes and Crossings in the UK Haulage Sector in 2022

	<p>In what way and why</p> <p>How, if at all, has this changed since/as a result of Covid/the pandemic?</p> <p>Have the crossing options you consider changed?</p> <p>Which changes have impacted your decision-making processes most</p> <p>In what way and why</p>	
<p>Section 3: Challenges faced in route planning</p>	<p>I'd like to ask you a little bit about the challenges that you face in planning routes and crossings</p> <p>What would you say are the main challenges that you face when it comes to route planning for your vehicles/freight movement?</p> <p>Are there any challenges in terms of customers' expectations? Could you describe them?</p> <p>Are there any challenges in recruiting and/or retaining the right drivers for certain routes? What are they?</p> <p>Have drivers' expectations and requirements changed and how does these present challenges to you?</p> <p>Are there any challenges in terms of additional border and customs requirements, border checks etc. and what are those challenges, how do they impact you?</p> <p>Are there any cost challenges that you face (e.g. rising fuel or staff costs)? How do they impact decision making?</p> <p>Thinking about the challenges you have just outlined; do they differ by different crossings/routes? In what way? [Moderator: also probe as challenges are discussed]</p> <p>How have you dealt with these challenges?</p> <p>Have you had any support, who from?</p> <p>And how effective has that support been?</p> <p>Moderator to ask for examples where possible.</p> <p>What (additional) support would you like to have when it comes to the challenges that you have outlined?</p> <p>From the UK Government</p> <p>From port operators</p> <p>From the haulage industry as a whole</p> <p>What/who else could provide support</p>	<p>10 mins (35 mins)</p>
<p>Section 4: Response to disruption</p>	<p>You mentioned/didn't mention disruption at ports, we'd just like to ask you a little more about that</p> <p>To what extent have you/your drivers/business been impacted by disruption at UK ports? (by disruption, we mean severe disruption rather than short delays i.e. things which have had a significant operational or financial impact to your business)</p> <p>What level or type of disruption has led to you having to switch ports/crossings? Could you provide a brief example?</p> <p>What level or type of disruption has led to you having to cancel crossings? Could you provide a brief example</p> <p>If you have experienced disruption, what was/is the impact of that on your business (e.g. from inconvenience and extra work to additional cost and driver impact)</p> <p>How would short term disruption (e.g. lasting a few days) vs longer term disruption (e.g. more systemic disruption lasting weeks/months) affect your decision making?</p> <p>How, if at all, do you find out about disruption?</p> <p>What communication channels</p> <p>Other industries/organisations/etc</p> <p>[Ask if time] And is there a difference when it comes to disruption at ports outside the UK/in Europe?</p>	<p>5 mins (40 mins)</p>
<p>Section 5: The Future and Wrap up</p>	<p>I would just like to wrap up with final thoughts about the future</p> <p>What are the opportunities that you see for the future of the haulage industry in the UK?</p> <p>What would you like to see from Government to enable you to make the most of those opportunities</p> <p>And what are the main challenges that you envisage in the future for the UK haulage industry?</p> <p>What would you like to see the industry and Government do to address those challenges</p> <p>Anything else you would like to mention?</p> <p>Thank you for your time today, there will be a reporting coming out on this issue later this year.</p> <p>Moderator to check on incentive preference (voucher/charity donation) if not already specified.</p>	<p>5 mins (45 mins)</p>

10.3 Glossary of Terms and Abbreviations

Table 6: Glossary

Term	Meaning
Abnormal load	A vehicle with a load that has any of the following: a weight of more than 44,000kg, an axle load of more than 10,000kg for a single non-driving axle or 11,500kg for a single driving axle, a width of more than 2.9 metres or a rigid length of more than 18.65 metres. [Source: Gov.uk]
Backloading	Transporting of goods on a return journey.
Data saturation	The point in the research process when no new information is discovered in data analysis.
Free find recruitment methods	The process of recruiting new participants without using an existing database, through the use of 'cold calling' approaches and networks of contacts.
Freight forwarder	A company that organises the transportation of another company's goods.
Haulage Manager	Job title for those responsible for the coordination of transportation of freight.
Load on Load off (LoLo)	Freight that is shipped unaccompanied, often within a container that can be easily loaded on and off ships.
Load sharing	Transport of multiple shipments in a single load.
Milk Run	When a vehicle makes multiple stops along the route to deliver or pick up goods.
Pinch Points	Areas which frequently experience disruption or congestion, such as busy motorways, urban areas or crossing points which may slow down journey time.
Private Carrier	A company that owns the vehicles it uses to transport its own goods.
Qualitative research	The process of collecting and analysing non-numerical data, such as language. Qualitative data is often in the form of text, video or audio recordings collected using in-depth interviews and analysed through thematic analysis.
Roll on Roll off (RoRo)	Freight traffic that drives on and off a ferry on its own vehicles.

The Short Strait crossings	Crossings from the Port of Dover to Calais and the Channel Tunnel at Folkestone (operated by Eurotunnel) to Coquelles near Calais, make up the Short Straits crossings. These two crossings occupy a unique strategic location at the narrowest point of the English Channel and are regarded to provide the quickest and most frequent services into the EU.
Thematic analysis	A method for analysing qualitative data that entails analysis across a dataset to identify, analyse and report repeated patterns.
Transport Management System	Technology that allows businesses to plan, execute and optimise the movements of their goods.

Table 7: Abbreviations

Abbreviation	Meaning
DfT	Department for Transport
UK	United Kingdom
EU	European Union
FF	Freight Forwarder
PC	Private Carrier
LoLo	Load on Load off
RoRo	Roll on Roll off
TMS	Transport Management System