GREAT BRITAIN (GB) TO SCHENGEN AREA ROAD TRANSPORT UNDER THE EUROPEAN UNION'S (EU) ENTRY/EXIT SYSTEM (EES)

GB goods and passenger transport operators' expectations of the EES and Schengen Short Stay rule

Annexes to the main report

JULY 2026

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Annex A Research materials

A.1 Interview topic guide

Interviewer instructions

- Questions are numbered.
- There are 2 distinct groups of interview participants.
  - The first group of interviews will start with cognitive testing of the survey, before proceeding with the depth interview. Questions for this group are marked as 'Phase 1', and questions are written in red text.
  - The second group of interviews will only involve the depth interview and not involve cognitive testing of the survey. Questions for this group are marked as 'Phase 2', and questions are written in purple text.

Instructive text which should NOT be read aloud to participants, is formatted in the following styles:

[indicative time for each section of the interview]

NOTES TO INTERVIEWER REGARDING ACTIONS TO BE TAKEN DURING THE INTERVIEW, ROUTING RULES FOR OVERALL SECTIONS, OR ADDITIONAL CONTEXT

[Routing rules for individual questions]

Text which is to be read aloud to the participants is formatted in the following styles:

1.1.1 Questions to be asked of participants

- Contextual information to be read to participants
  - Additional contextual information to be read to participants
    - Follow-up prompts to facilitate continuation of open dialogue

1. INTRODUCTION [5 MINS]

1.1 Interview context

- Thank you for taking the time to speak with me today. My name is …, I work for SYSTRA's Social and Market Research team.
- SYSTRA, along with Frontier Economics and Field Locker, have been commissioned by the Department for Transport (DfT) to conduct research. This research seeks to improve understanding of the effects of the European Union (EU) and Schengen 90 in 180-day immigration rule (or 90/180 Schengen rule) on UK commercial road transport operators. This rule came into effect in January 2021 when the UK left the EU following the end of the EU exit transition period.
- This research will also explore current and anticipated impacts of the upcoming implementation of the EU's Entry and Exit System (or EES implementation), which is expected to begin on 12 October 2025.
- This research will provide DfT with a greater understanding of the ways UK commercial road operator sectors have adapted to EU or Schengen area immigration rules since the UK's exit from the EU, and ahead of the EU's EES implementation, and the impact this has had. Before we go any further, I'll briefly explain the 90/180 Schengen rule and anticipated implementation of EES:

- Following the UK's exit from the EU in 2021, UK nationals are subject to a limit of spending 90 days in any 180-day period ("90/180") for short stays within the Schengen area. This visa-free limit applies to both permitted work and leisure journeys, is measured cumulatively across the entire Schengen area (rather than by country), and is calculated on a rolling basis. The limit is a fundamental part of the EU's conditions of entry for third country nationals. As such, it is not UK Government policy. Since EU exit, UK national hauliers and coach drivers have been subject to this limit.
- From 12 October 2025, the EU's new EES will be implemented. This is a new digital border system that will make changes to how British nationals demonstrate compliance with the 90/180 Schengen rule, when they are travelling to the Schengen area. The Schengen area consists of 25 of the 27 EU member states[1] (that is all except for Cyprus and Ireland). It also includes 4 non-EU countries: Iceland, Lichtenstein, Norway, and Switzerland.
- If you are travelling to a country in the Schengen area for a short stay using a UK passport, you will be required to register your biometric details, such as fingerprints and a photo, when you arrive. EES registration will replace the current system of manually stamping passports when visitors arrive to and leave a country in the Schengen area to calculate compliance with the 90/180 Schengen rule. Your digital EES record is valid for 3 years. If you enter the Schengen area again during this time, you will only need to provide a fingerprint or photo at the border, when you enter and exit.
- If you frequently travel to the Schengen area for work and/or leisure purposes, you will need to ensure that your total stay in the Schengen area is no more than 90 days in every 180 days. You will need to be aware of the penalty and enforcement approach for exceeding the immigration limit in any individual Member State you plan to travel to, or through.

[1] *Read the list of EU member states that are also part of Schengen to participants if this is required:* Austria, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden.

1.2 Housekeeping [Read Phase 1 or Phase 2 pre-amble as appropriate]

PHASE 1 INTERVIEWS (FIRST 1O INTERVIEWS INCLUDING COGNITIVE TESTING)

- We've got up to 1 hour for this interview today.
- For the first half of the interview, I'll ask you to do a screen share, and respond to some questions we have designed for a survey. I'll ask you to read the question out loud and provide your answer. As we go, I'll ask you some follow-up questions so I can understand if the questions are working as they should be. Your feedback will be valuable in ensuring our survey is fit for purpose before we distribute it more widely.
- For the second half of the interview, we'll have a more open discussion on the 90/180 Schengen rule and the implementation of EES, and the impacts of these on your organisation, in more detail.
- As a thank you for taking part, you'll receive a £100 voucher which will be sent to you by Field Locker (the organisation who invited you to participate in this interview).

PHASE 2 INTERVIEWS (NO COGNITIVE TESTING)

- We've got around 45 minutes to 1 hour for this interview today.
- I have some questions regarding the 90/180 Schengen rule and the implementation of EES, and the impacts of these on your organisation, in more detail. We have some flexibility for the discussion to be open.
- As a thank you for taking part, you'll receive a £75 voucher which will be sent to you by Field Locker (the organisation who invited you to participate in this interview).

READ TO ALL INTERVIEWEES

- This research is being undertaken in accordance with data protection legislation and Market Research Society guidelines.
- Your responses will be reported anonymously, and if we were to use any verbatim quotes in our report, you will only be identified as a goods or coach operator. This means that views you share will not be attributed to you or your organisation, so please be as open as you feel comfortable being.
- Your participation is voluntary, and you are free to withdraw from the research at any point.
- More information can be found in the privacy notice, which was shared with you prior to this interview.
- We usually record these interviews, as it helps us take accurate notes. The recording is only used for this purpose, and it won't be shared beyond the research team. It will also be deleted once the research is completed. Are you ok for this interview to be recorded?
- Do you have any questions before we begin the interview?

IF PHASE 1 INTERVIEW, PROCEED TO SECTION 2

IF PHASE 2 INTERVIEW, PROCEED STRAIGHT TO SECTION 3

2. COGNITIVE TESTING: FIRST 10 INTERVIEWS ONLY [~25-30 MINS]

SYSTRA INTERVIEWER TO PASTE THE TEST LINK IN THE CHAT FOR THE PARTICIPANT

IF THE PARTICIPANT IS UNABLE TO SHARE THEIR SCREEN, THE SYSTRA INTERVIEWER WILL SHARE THEIR SCREEN INSTEAD

- Please could you share your screen, and open the link to the online survey which I have sent to you in the chat?
- Please can you begin the survey, reading out loud as you go, and selecting the answers which apply to you?
- I'll ask you some additional questions as we progress, but if there's anything you want to check or that you find unclear, please let me know.

A SUBSET OF QUESTIONS WILL BE ASKED AT EACH POINT IN THE SURVEY (I.E. IT WILL NOT BE POSSIBLE TO COVER ALL ITEMS FOR EVERY SURVEY QUESTION].

BELOW ARE SOME EXAMPLE QUESTIONS WHICH CAN BE USED WHENEVER A PARTICIPANT DOESN'T REFLECT ON THESE FACTORS SPONTANEOUSLY. EXAMPLE QUESTIONS INCLUDE:

2.1.1 Can I please check a few points around how you understood that question? ***[Ask when participants read questions – test of comprehension]***

- In your own words, what is this question asking you?
- What do you think we're trying to learn by asking this question?
- What does [term] mean to you?
- Could any of these terms mean different things to different people? If so, in what ways could they be interpreted differently?
- Could this question be phrased more clearly?
- How clear and easy to follow are the instructions?
- Are the answer options worded correctly, and are those the words you would use to describe this?

2.1.2 When you answered that question… [*Ask once respondents have answered a question – test of thought processes]*

- How did you choose which answer to select?
- How confident did you feel about your answer?
- What information or knowledge did you base your answer on?

2.1.3 How easy or difficult was it to answer that question? ***[Ask once respondents have answered a question – test of answer option completeness]***

- What made it easy/difficult to answer this question?
- Were all the answer options relevant to the question?
- Do the answer options cover all possibilities, or are there any answer options missing?
- Are there any elements of the question you felt uncomfortable answering, or that you think anyone representing a coach or goods operator would feel uncomfortable answering?
- Do you think people will respond honestly to this question? If you don't think they'll respond honestly, what would be the reason for them not being honest?

- Why did you spend more/less time answering this question?

2.1.4 Now that we have completed the survey, can I ask… ***[Ask once respondents have completed the survey questions]***

- Did the order of questions make sense to you, or not?
- Was there anything missing from the survey, in your view?

SYSTRA INTERVIEWER TO WRAP UP COGNITIVE TESTING ONCE PARTICIPANT HAS COMPLETED THE SURVEY

PARTICIPANT OR SYSTRA INTERVIEWER (WHOEVER WAS SHARING THEIR SCREEN) SHOULD STOP SCREEN SHARING AT THIS POINT

- Thank you for filling out the survey and sharing your thoughts on it with me. You can stop sharing your screen now.
- The next part of the interview is a more open discussion.

3. SEMI-STRUCTURED INTERVIEW [25-30 MINS FOR PHASE 1, OR 45-60 MINS FOR PHASE 2]

INTERVIEWER TO NOTE THAT FOR PHASE 1 INTERVIEWS (COG TESTING), SOME OF THE BELOW QUESTIONS MAY HAVE ALREADY BEEN ANSWERED. WHERE NECESSARY, SKIP ALREADY ANSWERED QUESTONS TO AVOID DUPLICATION OF INTERVIEWING TIME.

3.1 Organisation details [Phase 2 duration ~10 mins]

- We'll start with a few questions about **your organisation**. We appreciate that you have completed the survey prior to this interview, but we just want to confirm a few items.

3.1.1 Please can you tell me about the organisation you're representing today, and your role within it? *Prompt, if needed, for:*

- *Operator type, e.g. Heavy Goods Vehicle (HGV) operator, Light Goods Vehicle (LGV) operator, Mixed fleet goods operator, or Coach operator.*
- *The nature of their operations:*
  - *Goods operator types of commodities: e.g. Events/sports/exhibition hauliers; perishable goods; general haulage; manufacturing; removals; other.*
  - *Coach operator services: e.g. Regular services (timetabled, transporting passengers on a specified route); Special regular services (regular service with specific passengers (e.g. commuters); Occasional services (e.g. one-off tourist trips)*
- *Whether their organisation works in partnership with any other companies or operators to provide their services*
- *[If the organisation does partner with another company/operator] What the nature of the partnership is (e.g. 'sharing' drivers or vehicles)*
- *The number and type of vehicles in use by their organisation*

3.2 Current operations [Phase 2 duration ~5 mins]

- I'd now like to ask you a couple of questions regarding your **current operations into mainland EU/Schengen area countries**.

3.2.1 Could you tell me a bit more about your organisation's travels into mainland EU and Schengen area countries[2]? *Prompt, if needed, on:*

- *Whether they travel into the Schengen area countries*
- *Where in the Schengen area they travel to (destinations), and which countries they travel through*
- *What their most frequently operated routes into the Schengen area countries are*
- *How frequently they travel into the Schengen area countries*
- *Whether there are any seasonal variations in the destinations, or routes taken [If yes, probe to understand why]*
- *Whether there are any other seasonal variations (volume or destinations), in goods or passengers transported [If yes, probe for specific details on changes to volume/destination etc]*

3.2.2 [Ask only to respondents who hold a SIOL and travel into the EU / non-EU Schengen countries] How flexible would you say your organisation is to change its operations, in terms of transport into and out of mainland EU and Schengen area countries?

- *Prompt, if needed, on elements of flexibility such as changing frequencies, route configurations, personnel rostering etc.*
- *Probe on reasons why they think their organisation is flexible to make operational changes*
- *Prompt on the benefits and drawbacks of their current operations model*

3.3 Understanding more about your drivers [Phase 2 duration ~15 mins]

- This next stage of the interview will focus on **your drivers.**
- We'll start by thinking about the **profile of your drivers**.

3.3.1 Can you please tell me about the characteristics of the drivers who work for your organisation? *Prompt, if needed, on:*

- *Number of drivers*
- *Their terms of employment (e.g. full time, part time, agency staff)*
- *Their contracts (e.g. permanent, one-off, zero hours, agency staff)*
- *Drivers' right to live and work in mainland EU and Schengen area*
  - *E.g.:*
    - *What percentage **do not** have the right to live and work in mainland EU and Schengen area countries?*
    - *What percentage **have** the right to live and work in mainland EU and Schengen area countries?*
- *What proportion of drivers hold UK; EU or non-EU Schengen; other country passports, or, if more applicable, are nationals of the UK; EU or non-EU Schengen countries; or other countries*
- *The number of drivers (regardless of nationality and right to live and work in mainland EU and Schengen area) who make cross-border trips from the UK to the EU or non-EU Schengen area countries*

[2] Only 2 EU member states are **not part of Schengen:** Cyprus and Ireland. The remaining 26 EU member states **are all part of Schengen**, and these are: Austria, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden. Additionally, **four non-EU member states are part of Schengen**: Iceland, Lichtenstein, Norway, and Switzerland.

- Let's now think about **driver assignments**, primarily for cross-border routes between the UK and mainland EU and Schengen area countries.

3.3.2 What, if any, impact does the rights held by drivers to live and work in mainland EU and Schengen area have on how your organisation hires or contracts drivers? *Prompt, if needed, to understand:*

- *How they hire or contract drivers, and what the impacts have been*
- *Or why this does not impact how they hire or contract drivers*

3.3.3 How does your organisation assign drivers to cross-border routes between the UK and mainland EU and Schengen area countries? *Prompt, if needed, to understand:*

- *If drivers' rights to work and live in Schengen area countries impacts how these routes are assigned*
  - *[If so] How?*
  - *[If so] What their current driver rotation patterns are for journeys into Schengen area countries, and how these are managed*
- *If any other factors influence driver assignments to cross-border routes between the UK and mainland EU and Schengen area countries*

3.3.4 How flexible is your organisation to make changes to its driver rotation patterns to cross-border routes between the UK and mainland EU and Schengen area countries? *Prompt, if needed, on:*

- *[If flexible] What changes they could make to driver assignments to cross-border routes between the UK and Schengen area countries*
- *[If flexible] How these changes are managed*
- *[If flexible] What issues they encounter when there are changes to driver assignments, and how these issues are overcome*
- *[If not flexible] What the main challenges to adapting driver rotation patterns for international routes are*

3.4 Understanding changes in operations since EU exit [Phase 2 duration ~10 mins]

- We're now going to shift our focus to **any changes your organisation may have faced** in the past five years.

3.4.1 In the past five years, what changes, if any, have you seen in your organisation?

EXAMPLES FOR INTERVIEWER: WORKSOURCE CHANGES, DEMAND FOR WORK, COST OF OPERATIONS, BUSINESS MODEL CHANGES, PARTNERSHIPS *Prompt, if needed, on:*

- *What the changes have consisted of*
- *How extensive changes have been*
- *The financial impacts of any changes*

3.4.2 [If there have been changes] What has caused the changes? *Await answer, but prompt, if needed on:*

- *The UK's exit from the EU*
- *COVID-19*

- *Cross-border haulage rules (e.g. cabotage and cross-trade restrictions[3]) under the UK-EU Trade and Cooperation Agreement (TCA) and attitudes towards these*
- *Preparing for implementation of the EU's Entry/Exit System (EES)*

3.5 Understanding changes in operations due to 90/180 Schengen rule [Phase 2 duration ~10 mins]

- We're now going to ask about your organisation's perceptions of the 90/180 Schengen rule.
- Would you like me to briefly repeat what the 90/180 Schengen rule entails?
- ***[If participant wants this information to be repeated]***
- After the UK's exit from the EU, UK nationals have had a limit on how much time they can spend in the Schengen area; meaning they can spend no more than 90 days in any 180-day period in the Schengen area.
    - This limitation on days applies both to work and leisure and is measured cumulatively across the entire Schengen area (rather than by country) and is calculated on a rolling basis.
- The 90/180 Schengen rule has applied to UK national hauliers and coach drivers since the EU exit.
- If you frequently travel to the Schengen area for work and/or leisure purposes, you will need to ensure that your total stay in the Schengen area is no more than 90 days in every 180 days.
- You will also need to be aware of the penalty and enforcement approach for exceeding the immigration limit in any individual Member State you plan to travel to, or through.

3.5.1 Before this interview, how aware was your organisation of the 90/180 Schengen rule?[4] *Prompt, if needed, on:*

- [If aware] How long they had been aware
- [If aware] Where did they hear about this?
- [If aware] To what extent they have understood its implications on their organisation's operations in cross-border EU/non-EU Schengen journeys

3.5.2 To what extent has your organisation adapted to comply with the 90/180 Schengen rule since January 2021 (when the UK left the EU following the end of the transition period)?

3.5.3 How, if at all, does your organisation monitor and manage the 90/180 Schengen rule for its drivers? *Prompt, if needed, on:*

3.5.4 *How they monitor driver days in mainland EU and non-EU Schengen area for **work***
3.5.5 *How they monitor driver days in mainland EU and non-EU Schengen area for **leisure** (e.g. for holidays)*

3 Cabotage is loading and unloading goods within one country, with a vehicle registered in another country. Cross-trade is loading goods in one country and unloading them in another country, with a vehicle registered in a third, different country.

4 The 90/180 Schengen rule means that UK nationals are allowed to spend a maximum of 90 days in any 180-day period within the Schengen area. This rule has been in place since EU single market arrangements ceased to apply to the UK, on 31 December 2020.

- *How it's monitored, in practical terms*
- *[If they don't monitor the 90/180 Schengen rule]* Why doesn't your organisation monitor this? Are there particular barriers preventing monitoring?

3.5.6 ***[If they do monitor driver days in the EU and the non-EU Schengen area]*** **What impacts have monitoring driver days in mainland EU/Schengen area had on your organisation, if any?** *Prompt, if needed on:*

- *Examples of impacts – prompt for whether these are positive / negative*
- *Impacts on the* ***recruitment of drivers*** *with and without the right to live and work in the EU and non-EU Schengen area countries*
- *Impacts on* ***retaining drivers*** *with and without the right to live and work in the EU and non-EU Schengen area countries*

3.5.7 **What impact, if any, has the 90/180 Schengen rule already had on your organisation?** *Prompt on any changes to:*

- *Where they operate*
- *The number of drivers*
- *The number of drivers with and without the right to live and work in the EU and non-EU Schengen area countries*
- *The costs of drivers*
- *The length of trips*

3.5.8 ***[If organisation has experienced changes due to 90/180 Schengen rule]*** **Which changes have been the biggest challenge for your organisation?**

- *Probe to understand why these changes were so challenging.*

3.5.9 **What impacts, if any, do you think the 90/180 Schengen rule might have on your organisation in the future?** *Prompt, if needed, to understand:*

- *Positive impacts*
- *Negative impacts*
- *[If more than one impact] Which impacts they believe to be the most important, and why*

3.5.10 **Does your organisation plan to make any additional changes as a result of the 90/180 Schengen rule?** *Probe, if needed, to understand:*

- *[If yes] When changes will take place*
- *[If yes] What steps have already been taken to prepare the changes*
- *[If yes] Whether they think the changes will be positive, negative, or neutral for their organisation*
- *[If yes, and more than one impact] Which changes they believe to be the most important, and why*
- *[If no] Why they are not planning on making any additional changes as a result of the 90/180 Schengen rule*

3.6 Understanding changes in operations due to upcoming EES implementation [~10 mins]

- We will move on to our next topic, which is about any changes you may make to operations due to the upcoming implementation of the EU's Entry/Exit System (EES).
- Would you like me to briefly repeat what this implementation entails?
- ***[If participant wants this information to be repeated]***

- From 12 October 2025, the EU's new EES will be implemented.
- This is a new digital border system that will make changes to how UK nationals demonstrate compliance with the 90/180 Schengen rule, when they are travelling to the Schengen area.
  - The Schengen area consists of 25 of the 27 EU member states[5] (that is all except for Cyprus and Ireland). It also includes 4 non-EU countries: Iceland, Lichtenstein, Norway, and Switzerland.
  - If you are travelling to a country in the Schengen area for a short stay using a UK passport, you will be required to register your biometric details, such as fingerprints and a photo, when you arrive.
- EES registration will replace the current system of manually stamping passports when visitors arrive to and leave a country in the Schengen area to calculate compliance with the 90/180 Schengen rule.
- Your digital EES record is valid for 3 years. If you enter the Schengen area again during this time, you will only need to provide a fingerprint or photo at the border, when you enter and exit.

3.6.1 Before this interview, had your organisation heard of the implementation of the EES?

Prompt on:

- *[If aware] How long they had been aware?*
- *[If aware] Where did they hear about this?*

3.6.2 What impact, if any, has the implementation of the EES already had on your organisation?
Prompt on:

- *Positive impacts*
- *Negative impacts*

3.6.3 *[If organisation has experienced changes due to the implementation of EES]* Which changes have been the biggest challenge for your organisation?

- *Probe to understand why these changes were so challenging.*

3.6.4 What impact, if any, do you think that the implementation of the EES may have on your organisation after it has come into effect later this year?

3.6.5 Do you plan to make any additional changes as a result of the implementation of the EES? If so, please explain the changes you're planning. *Probe/prompt, if needed, to understand:*

- *[If yes] When any changes will take place*
- *[If yes] What steps they have already taken to prepare the changes*
- *[If yes] Whether the changes will be positive, negative, or neutral for their organisation*
- *[If no] Why no additional changes are planned*

[5] *Read the list of EU member states that are also part of Schengen to participants if this is required:* Austria, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden.

3.6.6 ***[If not already covered]*** **Has your organisation undertaken any planning or scenario modelling in anticipation of the EES?**

- *Probe, if needed, on what kinds of decisions or trade-offs they have had to consider.*

3.7 Wrap-up [Phase 2 ~5 mins]

- Thank you for all you've shared so far. I will now ask you a few more general questions before we wrap up this interview.

3.7.1 **Overall, how would you sum up the effect that the 90/180 Schengen rule has had on your organisation since it came into effect for the UK in 2021?**

3.7.2 **Overall, how would you sum up the anticipated effect on your organisation of the implementation of the EES from October 2025?**

3.7.3 **Are there any other impacts of the implementation of the EES System and the 90/180 Schengen rule that you would like to comment on?**

- *Prompt on wider impacts (e.g. on the industry more broadly, on consumers) in addition to impacts on their your organisation.*

3.7.4 **What, if anything, could help your organisation manage the changes caused by the implementation of the EES?**

- Thank you so much for your time today, and for sharing all your insights.

- As a thank you for taking part, you'll receive your voucher from Field Locker (the organisation who invited you to participate in this interview) in the next few days.

A.2 Operator survey questionnaire

Screening questions

To start, we'd like to check that your organisation qualifies for this research.

S1.	**Is the organisation you work for**: [name drawn from sample from unique survey link]	
	a	Yes
	b	No [Close interview; Field Locker check details against sample lists for potential telephone follow-up]

S2.	**Does your organisation operate vehicles transporting… [Single-select]**	
	a	Goods on the road (i.e. HGVs / LGVs / mixed fleet)?
	b	Passengers on the road (i.e. bus / coach operator)?
	c	Neither of these [Close interview; Field Locker check details against purchased sample lists for potential telephone follow-up]

S3.	**Does your organisation hold a Standard International Operating Licence (SIOL)?**	
	a	Yes
	b	No [Close interview and flag for organisation data check]

Organisation details

To begin, please tell us a little about your organisation.

Q1.	**[Ask all] What is your company registration number?** This information is solely for the purposes of checking your organisation's name against Companies House Records. **[Single select]**
A	OPEN TEXT
B	Don't know **[Exclusive]**

Q2.	**[Ask all] Does your organisation currently run any international services that require cross-border travel between the UK and the mainland EU or the Schengen Area? [Single select]**
a	Yes
b	No

Q3.	**[If S2 = a] What type(s) of goods does your organisation transport?** Please think of all operations undertaken by your organisation, domestically and internationally. Please select all that apply**. [Multi select; Do not read out answer options for CATI - code unprompted answer]**
a	Agricultural products
b	Chemical products
c	Coal and lignite
d	Coke and refined petroleum products
e	Empty containers, pallets and other packaging
f	Food products, including beverages and tobacco
g	Furniture and other manufactured goods
h	Glass, cement and other non-metallic mineral products
i	Groupage (i.e. combining several smaller shipments into one load)
j	Household and office removals and other non-market goods
k	Machinery and equipment
l	Mail and parcels
m	Metal ore and other mining and quarrying
n	Metal products
o	Textiles and textiles products, leather and leather products

p	Transport equipment
q	Unidentifiable goods
r	Waste related products
s	Wood products
t	Other, please specify [OPEN TEXT]

Q4.	**[If S2 = b] What type(s) of services does your organisation provide? [Multi select]**
a	Regular services – following a timetable, transporting passengers between fixed points along a specified route
b	Special regular services – a regular service carrying specified types of passengers (e.g. taking workers between home and work)
c	Occasional services – any type of journeys not counted as a regular or special regular service (e.g. holiday tours)
d	Other, please specify [OPEN TEXT]

Current operations

We'll now ask you some questions about your fleet, and the types of routes your organisation takes.

[SHOW IN ONLINE SURVEY ONLY / DON'T READ OUT FOR CATI]

Some of the questions refer to the Schengen Area. [LINK IF 'SCHENGEN AREA' CLICKED: The Schengen Area consists of the following EU member states: Austria, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden. The Schengen Area also includes four non-EU countries: Iceland, Lichtenstein, Norway and Switzerland. Ireland and Cyprus are both EU member states but are not in the Schengen Area.]

Q5a.	**[Ask all] In total, how many vehicles does your company have continuous use of at present for [IF S2=a 'transporting goods on the road' / IF S2=b 'running your bus or coach services']? Please consider all vehicles you have use of, including company-owned and leased vehicles.** If you are unsure but are able to provide a best estimate, please do so. **[Single select; Do not read out answer options for CATI - code unprompted answer]**
a	None [Skip Q5b if selected]
b	1
c	2-5
d	6-10
e	11-20

f	21-50
g	51-100
h	More than 100
i	Don't know

Q5b.	**[Ask all, except if Q5a='None'] Of these vehicles, how many have a SIOL?** If you are unsure but are able to provide a best estimate, please do so. **[Single select; Do not read out answer options for CATI - code unprompted answer; Logic check – only allow the selection of a category which is the same, or less than Q4a response]**
a	None
b	1
c	2-5
d	6-10
e	11-20
f	21-50
g	51-100
h	More than 100
i	Don't know

Q6a.	**[If Q2 = a and Q4 = a or b] What are your most frequently operated routes for UK-Europe (mainland EU and Schengen Area) regular or special regular services?** Describe up to three routes, clearly stating the starting location and final destination, including any major stops and countries transited through. **[Multi response]**
a	OPEN TEXT
b	OPEN TEXT
c	OPEN TEXT
d	Don't know **[Exclusive]**
e	Not applicable **[Exclusive]**

Q6b.	**[If Q6a ≠ d] What is the average duration of each route you mentioned previously? [Open text; Decimal number permitted, Allow any number >0]**
a	[Q6a_a] – ……. Days
b	[Q6a_b] – ……. Days [Show only if 2+ routes stated at Q6a]
c	[Q6a_c] – ……. Days [Show only if 3 routes stated at Q6a]

Q7a.	**[If Q2 = a and Q4 = c] What are your most frequently operated routes for UK-Europe (mainland EU and Schengen Area) occasional services (e.g. holiday**

	tours)? Describe up to three routes, clearly stating the starting location and final destination, including any major stops and countries transited through. **[Multi response]**
a	OPEN TEXT
b	OPEN TEXT
c	OPEN TEXT
d	Don't know **[Exclusive]**

Q7b.	**[If Q7 a≠ d] What is the average duration of each route you mentioned previously? [Open text; Decimal number permitted; Allow any number >0]**
a	[Q7a_a] – ……. Days
b	[Q7a_b] – ……. Days [Show only if 2+ routes stated at Q7a]
c	[Q7a_c] – ……. Days [Show only if 3 routes stated at Q7a]

Q8a.	**[If Q2 = a] Which countries does your organisation currently run services to and through that require cross-border travel between the UK and the Schengen Area?** If you currently operate routes to and through multiple countries, please select up to five countries which you run services to and through most frequently **[Single select from each list; Up to 5 selections permitted; Do not read out answer options for CATI - code unprompted answer]**
a	[Drop down list of countries in the mainland EU/Schengen Area]: Austria, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, and Switzerland.
b	[Drop down list of countries in the EU/Schengen Area; same list as line a]
c	[Drop down list of countries in the EU/Schengen Area; same list as line a]
d	[Drop down list of countries in the EU/Schengen Area; same list as line a]
e	[Drop down list of countries in the EU/Schengen Area; same list as line a]
f	Don't know **[Exclusive]**

Q8b.	**[If Q8a ≠ f] How often does your organisation travel to and through each of the following countries using SIOL vehicles? [Single select each row]**								
		Several times a week	Once a week	Several times a month, but less than weekly	Once a month	Several times a year, but less than monthly	Once a year	Less than once a year	Don't know

a	[Q8a_a]								
b	[Q8a_b]								
c	[Q8a_c]								
d	[Q8a_d]								
e	[Q8a_e]								

Q8c.	**[If Q4 = a, b or c] How many journeys has your organisation made in the past 12 months …** If you are unsure on the exact number but are able to provide a best estimate, please do so. **[Permit any whole number (including 0); Logic check – b should be less than or equal to a; Only present row b if Q2=a]**	
a	In total	[WHOLE NUMBER] ……
b	[If Q2=a] Which were cross-border between the UK and the Schengen Area	[WHOLE NUMBER] ……
c	Don't know **[Exclusive]**	

Your Drivers

This next stage of the survey will focus on your drivers.

Q9a.	**[Ask all] Approximately, how many of each type of employee work for your organisation?** Please think about your whole organisation. If you are unsure but are able to provide a best estimate, please do so. If you have any employees who cover multiple roles (e.g. a driving role and a management role), please include them under 'Employees with multiple roles'. **[Provide drop down list with range options provided in Q5; Do not read out answer options for CATI - code unprompted answer]**			
		Full-time	Part-time (including freelance/self-employed)	Agency
a	Employees exclusively in driving roles	[Q5 options]	[Q5 options]	[Q5 options]
b	Employees exclusively in engineering roles	[Q5 options]	[Q5 options]	[Q5 options]
c	Employees exclusively in management or administrative roles	[Q5 options]	[Q5 options]	[Q5 options]
d	Employees with multiple roles	[Q5 options]	[Q5 options]	[Q5 options]

Q9b.	**[If SUM Q9a_d > 0] Please describe the multiple roles held by some of your employees.**
a	OPEN TEXT

b	Don't know **[Exclusive]**

Q10.	**[Ask all] What percentage of the drivers you currently employ are…** If you are unsure on the exact percentage but are able to provide a best estimate, please do so. **[Logic check – percentages should not exceed 100]**	
a	UK nationals	[WHOLE NUMBER] …….%
b	EU or Schengen Area nationals (including those who are dual nationals)	[WHOLE NUMBER] …….%
c	Non-UK or Non-EU/ Schengen Area nationals	[WHOLE NUMBER] …….%
d	Don't know **[Exclusive]**	

Q11.	**[If Q2 = a] What percentage of your drivers, regardless of their nationality, make cross-border trips between the UK and mainland EU or the Schengen Area?** If you are unsure but are able to provide a best estimate, please do so. **[Single select; Do not read out answer options for CATI - code unprompted answer]**
a	1-10%
b	11-20%
c	21-30%
d	31-40%
e	41-50%
f	51-60%
g	61-70%
h	71-80%
i	81-90%
j	91-100%
k	Don't know

Q12.	**[If Q2 = a and Sum Q10 > 0] Thinking only about drivers you employ that make cross-border trips between the UK and mainland EU or the Schengen Area, what percentage are…** If you are unsure on the exact percentage but are able to provide a best estimate, please do so. **[Logic check – percentages should not exceed 100; Only present rows where Q10 answer was > 0]**	
a	[If Q10a > 0] UK nationals	[WHOLE NUMBER] …….%
b	[If Q10b > 0] EU or Schengen Area nationals (including those who are dual nationals)	[WHOLE NUMBER] …….%
c	[If Q10c > 0] Non-UK or Non-EU / Schengen Area nationals	[WHOLE NUMBER] …….%

d	Don't know **[Exclusive]**

Q13.	**[If Q2 = a] To what extent do you agree or disagree with the following statement: "My organisation monitors the number of days its drivers spend in the mainland EU or Schengen Area for work"? [Single select]**
a	Strongly agree
b	Agree
c	Neither agree nor disagree
d	Disagree
e	Strongly disagree
f	Don't know

Q14.	**[If Q2 = a and Q13 ≠ f] How has this changed compared to last year? [Single select]**
a	We monitor driver days more than we did 1 year ago
b	No change compared to 1 year ago
c	We monitor driver days less than we did 1 year ago
d	Don't know

Q15.	**[If Q2 = a] To what extent do you agree with the following statement: "My organisation monitors the number of days its drivers spend in the mainland EU or Schengen Area for leisure/holidays (i.e. outside of work travel)"? [Single select]**
a	Strongly agree
b	Agree
c	Neither agree nor disagree
d	Disagree
e	Strongly disagree
f	Don't know

Q16a.	**[If Q2 = a] How many vacancies does your organisation currently have for…** If you are unsure on the exact number but are able to provide a best estimate, please do so.	
a	All drivers (for domestic and international trips)	OPEN TEXT [Whole number only]
b	Drivers specifically to make cross-border trips between the UK and mainland EU or Schengen Area only	OPEN TEXT [Whole number only; Logic check - number must be ≤ Q16a_a]
c	Don't know **[Exclusive]**	
d	Not applicable **[Exclusive]**	

Q16b.	[If Q16a ≠ c or d] **Are the current number of driver vacancies at your organisation…?** [Single select]
a	**Higher than** before EU exit in 2021
b	**Lower than** before EU exit in 2021
c	**About the same** as before EU exit in 2021
d	Prefer not to say
e	Don't know
f	Not applicable

Q17.	[If Q2 = a] **How easy or difficult does your organisation currently find it to recruit:** [Single select each row]						
		Very easy	Quite easy	Neither easy nor difficult	Quite difficult	Very difficult	Don't know
a	All drivers (for domestic and international trips)						
b	Drivers specifically to make cross-border trips between the UK and mainland EU or Schengen Area only						

Q18	[If Q2 = a] **Since EU exit in 2021, has your organisation found hiring the following types of employees…** [Single select each row]						
		Much easier than before EU exit	A little easier than before EU exit	The same as before EU exit	A little harder than before EU exit	Much harder than before EU exit	Don't know
a	All drivers (for domestic and international trips)						
b	Drivers specifically to make cross-border trips between the UK and mainland EU or Schengen Area only						

Revenues

This next stage of the survey will focus on your organisations revenues and operating costs. As a reminder, all the information you provide will be **confidential**, and Field Locker will anonymise your survey responses. No personal identifiers will be used in analysis or reporting.

Q19.	**[Ask all] Approximately, what was your organisation's total annual revenue in the last financial year (2024-2025)?** If you are unsure, but are able to provide a best estimate, please do so. **[Single select; Do not read out answer options for CATI - code unprompted answer]**
a	Less than £100,000
b	£100,000 to £249,999
c	£250,000 to £499,999
d	£500,000 to £999,999
e	£1 million to £4.99 million
f	£5 million to £9.99 million
g	£10 million to £24.99 million
h	£25 million to £49.99 million
i	£50 million or more
j	Prefer not to say
k	Don't know

Q20.	**[If Q2 = a] Approximately, what percentage of your organisation's total revenue is made up of cross-border travel between the UK and mainland EU or Schengen Area?** If you are unsure, but are able to provide a best estimate, please do so. **[Single select; Do not read out answer options for CATI - code unprompted answer]**
a	1-10%
b	11-20%
c	21-30%
d	31-40%
e	41-50%
f	51-60%
g	61-70%
h	71-80%
i	81-90%
j	91-100%
k	Don't know

Q21.	**[Ask all] Approximately, what are the overall annual operating costs of running your** [PIPE ANSWER FROM S2] **services?** If you are unsure, but are able to provide a best estimate, please do so. **[Provide drop down list with range options provided in Q19]**		
a	Driver wages	[Q19 options]	Don't know
b	Fuel costs	[Q19 options]	Don't know

c	Other fixed costs (e.g. other labour and staff costs, insurance, maintenance)	[Q19 options]	Don't know
d	Administration costs (e.g. management, welfare, non-operational costs)	[Q19 options]	Don't know
e	Prefer not to say **[Exclusive]**		

Q22.	**[If Q2 = a] What are the estimated total annual costs to your organisation for running journeys between the UK and the mainland EU or Schengen Area? Please consider all driver costs, including recruitment, wages and expenses (e.g. subsistence and accommodation).** If you are unsure, but are able to provide a best estimate, please do so. **[Single select; Do not read out answer options for CATI - code from answer]**
a	Less than £100,000
b	£100,000 to £249,999
c	£250,000 to £499,999
d	£500,000 to £999,999
e	£1 million to £4.99 million
f	£5 million to £9.99 million
g	£10 million to £24.99 million
h	£25 million to £49.99 million
i	£50 million or more
j	Prefer not to say
k	Don't know

Understanding changes in operations due to the 90/180 Schengen rule

We are now going to ask about your awareness and perceptions of the 90/180 Schengen rule [LINK WHEN '90/180 SCHENGEN RULE' CLICKED to the 'show in online survey only / do not read out for CATI text below]. This rule means that UK nationals are limited to spending a maximum of 90 days in any 180-day period within the Schengen area.

[SHOW IN ONLINE SURVEY ONLY / DON'T READ OUT FOR CATI]

This visa-free limit applies to both permitted work and leisure journeys, is measured cumulatively across the entire Schengen area (rather than by country) and is calculated on a rolling basis. The limit is a fundamental part of the EU's conditions of entry for third country nationals. As such it is not UK Government policy. Since EU exit, UK nationals working as hauliers and coach drivers have been subject to this limit.

Q23.	**[Ask all] Before this survey, to what extent was your organisation aware of the 90/180 Schengen rule? [Single-select]**
a	Fully aware
b	Somewhat aware

c	Not at all aware
d	Don't know

Q24a.	**[Ask all] What has been the overall impact, if any, of the 90/180 Schengen rule on your organisation to date? [Single-select]**
a	Very positive
b	Somewhat positive
c	No impact
d	Somewhat negative
e	Very negative
f	Don't know

Q24b.	**[Ask all] What impact, if any, of the 90/180 Schengen rule do you anticipate there being on your organisation in the future? [Single-select]**
a	Very positive
b	Somewhat positive
c	No impact
d	Somewhat negative
e	Very negative
f	Don't know

Q24c.	**[If Q24b = a, b, d or e] What impacts do you think that increased enforcement of the 90/180 Schengen rule will have on your organisation in the future? [Single select each row]**						
		Will greatly increase	Will slightly increase	Will not change	Will slightly decrease	Will greatly decrease	Don't know
a	The complexity of journey planning						
b	Changes to driver scheduling patterns						
c	The flexibility in assigning drivers to international routes						
d	Investment in new methods for tracking driver days						
e	The number of staff in administrative roles						

f	Reliance on non-UK drivers						
g	Reliance on agency staff						
h	Overall operating costs						
i	The profitability of international routes						
j	The scale of our international operations						
k	Focus on domestic operations						
l	Negotiations on contracts with mainland EU or Schengen Area partners						
m	Our confidence in operating in the mainland EU and Schengen Area						
n	Our perceived risk levels for international operations						

Understanding changes in operations due to the upcoming EES implementation

We will now focus on any changes your organisation may have made to operations due to the upcoming implementation of the EU's Entry/Exit System (EES) [LINK WHEN 'EU's ENTRY/EXIT SYSTEM' CLICKED to the 'show in online survey only / do not read out for CATI text below].

[SHOW IN ONLINE SURVEY ONLY / DON'T READ OUT FOR CATI]

From 12 October 2025, the EU's EES will begin. This new digital border system will change requirements for British nationals travelling to the Schengen Area. If your drivers are travelling to a country in the Schengen Area for a short stay using a UK passport, they will be required to register their biometric details (such as fingerprints and a photo) when they arrive at a Schengen border. EES registration will replace the current system of border officials manually stamping passports when visitors arrive in the Schengen Area countries. There is no fee payable for EES registration. If your drivers frequently travel to the Schengen

Area for work and/or leisure purposes, they must ensure their total stay in the Schengen Area is no more than 90 days in every 180 days.

Q25a.	[Ask all] **Before this survey, to what extent was your organisation aware of the upcoming implementation of the EU's Entry / Exit System, also known as EES?** [Single-select]
a	Fully aware
b	Somewhat aware
c	Not at all aware
d	Don't know

Q25b.	[If Q25a = a or b] **For how long has your organisation been aware of the EU's Entry / Exit System (EES)?** [Single-select]
a	Less than a month
b	More than a month, but less than 6 months
c	At least 6 months, but less than 1 year
d	At least 1 year, but less than 2 years
e	At least 2 years, but less than 4 years
f	4 years or more
g	Don't know

Q26a.	[Ask all] **What has been the overall impact, if any, of the EU's Entry / Exit System (EES) implementation on your organisation to date?** [Single-select]
a	Very positive
b	Somewhat positive
c	No impact
d	Somewhat negative
e	Very negative
f	Don't know

Q26b.	[Ask all] **What impact if any, do you anticipate there being on your organisation in the future, as a result of the upcoming implementation of the EU's Entry / Exit system (EES)?** [Single-select]
a	Very positive
b	Somewhat positive
c	No impact
d	Somewhat negative
e	Very negative
f	Don't know

Q27.	**[If Q2 = a and (Q23 = a or b or Q25a = a or b)] Has your organisation made any changes to your operations to date, due to the EU's Entry / Exit System (EES), or 90/180 Schengen rule?** Please select all that apply. **[Multi-select]**
a	Yes – we have made operational changes due to the EU Entry / Exit System (EES)
b	Yes – we have made operational changes due to the 90/180 Schengen rule
c	No – we have not made any changes **[Exclusive]**

Q28.	**[If Q27 = a or b] Please describe what these operational changes are**
a	[If Q27=a] Changes due to the EU Entry / Exit System (EES): OPEN TEXT
b	[If Q27=b] Changes due to the 90/180 Schengen rule: OPEN TEXT

Annex B

B.1 Summary of operator demographic characteristics from the survey

The tables below show the number of respondents (separately for Goods and Passenger operators), falling into each demographic category, and the proportions (%).

Number of responses

Table 1 Number of responses

Goods operators	Goods operators (%)	Passenger operators	Passenger operators (%)
365	84%	70	16%

Source: *Frontier Economics*

Note: *Question: "Does your organisation operate vehicles transporting i) goods on the road, ii) passengers on the road?"*

Fleet size

Table 2 Fleet size

Category	Goods operators	Goods operators (%)	Passenger operators	Passenger operators (%)
0 to 1	70	19%	4	6%
2 to 5	117	32%	21	30%
6 to 10	79	22%	11	16%
11 to 20	37	10%	16	23%
More than 20	62	17%	17	24%
Total	**365**		**69**	

Source: *Frontier Economics*

Note: *Question: "In total, how many vehicles does your company have continuous use of at present for [IF S2=a 'transporting goods on the road'] and [IF S2=b 'running your bus or coach']".*
Percentages may not sum to 100% due to rounding.
Subgroups that relate to less than 4 responses have been suppressed to reduce the risk of identifying individual respondents, including "Don't know" responses.

Business size (revenue per annum)

Table 7 Business size (revenue per annum)

Category	Goods operators	Goods operators (%)	Passenger operators	Passenger operators (%)
Less than £100,000	32	9%	4	6%
£100,000 to £249,999	67	18%	7	10%
£250,000 to £499,999	33	9%	7	10%
£500,000 to £999,999	41	11%	12	17%
£1 million to £4.99 million	89	24%	17	24%
£5 million or more	37	10%	7	10%
Prefer not to say or don't know	66	18%	16	23%
Total	**365**		**70**	

Source: *Frontier Economics*

Note: *Question: "Approximately, what was your organisation's total annual revenue in the last financial year (2024 to 2025)?"*
Percentages may not sum to 100% due to rounding.

Number of drivers

Table 8 Number of drivers – full-time

Category	Goods operators	Goods operators (%)	Passenger operators	Passenger operators (%)
None	48	13%	7	10%
1	66	18%	<4	-
2 to 5	111	30%	28	40%
6 to 10	47	13%	7	10%
11 to 20	42	12%	14	20%
More than 20	50	14%	11	16%
Total	**364**		**70**	

Table 9 Number of drivers – part-time

Category	Goods operators	Goods operators (%)	Passenger operators	Passenger operators (%)
None	211	58%	19	27%
1	56	15%	7	10%
2 to 5	75	21%	30	43%
6 to 10	13	4%	10	14%
11 to 20	5	1%	4	6%
More than 20	<4	-	0	0%
Total	**363**		**70**	

Table 10 Number of drivers – agency workers

Category	Goods operators	Goods operators (%)	Passenger operators	Passenger operators (%)
None	306	84%	64	91%
1	6	2%	<4	3%

Category	Goods operators	Goods operators (%)	Passenger operators	Passenger operators (%)
2 to 5	30	8%	<4	3%
6 to 10	8	2%	0	0%
11 to 20	6	2%	<4	3%
More than 20	6	2%	0	0%
Total	**362**		**70**	

Source: *Frontier Economics*

Note: *Question: "Approximately, how many of each type of employee work for your organisation?" Percentages may not sum to 100% due to rounding.*

Types of goods transported or services offered

Table 11 Types of goods transported

Category	Goods operators	Goods operators (%)
Agricultural products	65	18%
Chemical products	29	8%
Coal and lignite	9	3%
Coke and refined petroleum products	6	2%
Empty containers, pallets and other packaging	93	26%
Food products, including beverages and tobacco	105	29%
Furniture and other manufactured goods	71	20%
Glass, cement and other non-metallic mineral products	40	11%
Groupage (combining several smaller shipments into one load)	53	15%
Household and office removals and other non-market goods	31	9%
Machinery and equipment	101	28%
Mail and parcels	25	7%
Metal ore and other mining or quarrying	23	6%

Category	Goods operators	Goods operators (%)
Metal products	62	17%
Textiles and textile products, leather and leather products	36	10%
Transport equipment	65	18%
Unidentifiable goods	21	6%
Waste related products	42	12%
Wood products	64	18%
Other	121	33%
Total	**1062 (from 365 respondents)**	

Source: *Frontier Economics*

Note: *Respondents could select multiple types of goods*
Question: "What type(s) of goods does your organisation transport?"
Percentages may not sum to 100% due to rounding.

Table 12 Types of services offered

Category	Passenger operators	Passenger operators (%)
Regular services	18	26%
Special regular services	9	13%
Occasional services	58	83%
Other	6	9%
Total	**91 (from 70 respondents)**	

Source: *Frontier Economics*

Note: *Regular services - following a timetable, transporting passengers between fixed points along a specified route*
Special regular services - a regular service carrying specified types of passengers (eg taking workers between home and work)
Occasional services - any type of journeys not counted as a regular or special regular service (eg holiday tours)
Respondents could select multiple services.
Question: "What type(s) of services does your organisation provide?"
Percentages may not sum to 100% due to rounding.

Operations in mainland EU or the Schengen area

Table 13 Operations in mainland EU or the Schengen area

Category	Goods operators	Goods operators (%)	Passenger operators	Passenger operators (%)
No	227	62%	39	56%
Yes	138	38%	31	44%
Total	**365**		**70**	

Source: *Frontier Economics*

Note: *Question: "Does your organisation currently run any international services that require cross-border travel between the UK and the mainland EU or the Schengen area?"*

Annex C

C.1 Qualitative analysis themes and codes

Driver recruitment

- Operator not specifically seeking drivers with EU freedom of movement
- Operator seeking drivers with EU freedom of movement
- Hiring fewer people - not EU Exit related
- Hiring fewer people - EU Exit related
- Hiring more people - not EU Exit related
- Hiring more people - EU Exit related
- Labour (driver) shortage - EU Exit related
- Labour (driver) shortage - not EU Exit related

Drivers' freedom of movement

- Staff pursuing freedom of movement rights/EU passports
- Reduced journey frequency to the EU post EU Exit

Driver assignments

- Cross-border driver assignments not driven by freedom of movement rights
- Cross-border driver assignments driven by freedom of movement rights

The UK labour market

- EU work lost to foreign operators
- EU work gained for UK-based operators
- UK work lost to foreign operators
- UK work gained post EU exit
- Lack of UK-based work opportunities
- Growth in UK-based work opportunities
- UK work is less profitable than EU work
- UK work is more profitable than EU work
- Inability to compete in the UK market
- Specialist skills required

Monitoring EU days

- No monitoring of EU driver days

- No monitoring of EU leisure days
- Already monitoring EU driver days
- Already monitoring EU leisure days
- Intend to monitor EU driver days
- Intend to monitor EU leisure days
- No intention to monitor EU driver days
- No intention to monitor EU leisure days

Awareness of EES

- No awareness of EES
- Some awareness of EES
- Full awareness of EES
- Questions about the practicalities of the 90/180 rule
- Information provided by trade associations/publications
- Information provided by wider media
- Information provided by others
- Information provision perceived as insufficient
- Information provision perceived as good

Planning/scenario planning

- No planning/scenario planning conducted
- Planning/scenario planning conducted

Impacts of the 90/180 rule

- No impact to date (90/180)
- Positive impacts (90/180)
- Negative impacts (90/180)
- Neutral impacts (90/180)
- Costs on drivers/operators for passport renewal (90/180)
- Increased processing time at borders (passports) (90/180)
- No enforcement of 90/180 rule

Expected impacts of EES – *on businesses*

- No impact expected (EES)
- Negative impacts on business revenue (EES)
- Positive impacts on business revenue (EES)

- Negative impacts on small operators (EES)
- Positive impacts on small operators (EES)
- Negative impacts on large operators (EES)
- Positive impacts on large operators (EES)
- Increased admin time/cost for monitoring/managing drivers and routes
- Reduced customer demand (EES)
- Shortage of vehicles (EES)
- Concerns about the ability to fulfil contracts (EES)
- Increasing prices for goods/coach services (EES)
- Intending to pursue more UK-based work opportunities (EES)
- Greater clarity on the impacts of the EU exit on business
- Delayed impacts due to seasonal variation

Expected impacts of EES – *on/to do with drivers*

- Concerns drivers will be stopped at the border (EES)
- Increased passport processing time (EES)
- Reduced passport processing time (EES)
- Shortage of drivers (EES)
- Need to have additional/feeder drivers on each journey (EES)
- Negative impacts on drivers' holidays (EES)
- Increased reliance on EU national drivers
- Concerns about data privacy (EES)

Wider impacts of 90/180 or EES

- Negative impacts on industry (EES)
- Positive impacts on industry (EES)
- Negative impacts on UK consumers (EES)
- Positive impacts on UK consumers (EES)

Need for support

- Support needed to monitor EU days
- Support needed to speed up passport processing
- Ensure information provision about leisure days counting towards 90/180
- Visa for transportation workers requested
- More information needed about EES
- Registering at landing rather than at departure

- Real-time information provision at borders

Other or uncategorised

- Issues/delays at borders/ports due to customs processes
- EU/Schengen travel is less attractive due to regulation (eg driving time)
- EU exit beneficial for business

Annex D Technical annex

D.1 Survey boosting

Survey respondents were recruited by sending a survey link to operators registered in the Vehicle Operator Licensing database (VOL) as holding an SIOL. In addition to company names, VOL contains information on the number of authorised vehicles each company has (the fleet size). Fleet-size information included in VOL was cross-referenced with our survey responses. This comparison showed differences in fleet size between the companies that responded to the survey and all operators featured in VOL. The differences are shown in **Error! Reference source not found.** and are broken down by fleet size for goods operators who responded to our survey, for those in VOL, and for the corresponding fleet sizes of passenger operators.

Among goods operators who responded to the survey, a larger share had 0 to 1 authorised vehicles (19%) compared to all operators in VOL (11%). The share of operators with 2 to 5 vehicles was lower among survey respondents (32%) compared to those in the database (47%). There was also a 6% greater representation of the largest HGV operators (17%) than their representation in the database (11%). For passenger operators, the fleet-size distribution of survey respondents closely matched that of all operators in the database.

Ideally, the fleet-size distribution among both operator types responding to the survey would be similar to that recorded in the VOL. A higher level of similarity between the goods operators' fleet sizes reported in our survey and in VOL would indicate that our findings are more generalisable to the total population of goods operators. The differences in goods operator fleet sizes mean that the corresponding findings may be less representative of the total GB goods operator population than findings for passenger operators. However, it is important to note the VOL does not distinguish between operators that do and don't operate internationally. Therefore, it was not feasible to isolate those who specifically run services in the EU in this analysis.

D.2 Data cleaning

Data-cleaning code was set up in RStudio, a software for statistical analysis. The data cleaning checks conducted included:

- ensuring each respondent had a unique ID
- checking there were no duplicate IDs
- ensuring variable labels and value labels matched the survey and were clear to interpret
- breaking-out multiple response sets, so each variable within a set had its own column in the data

- generating new variables with 'netted' categories that group adjacent values for analysis, providing larger sub-base sizes (for example, 'Strongly agree' and 'Agree' responses were combined into a new 'Net Agree' category)
- identifying respondents who may have submitted contradictory answers (for example, were not aware of the 90/180 Schengen rule, but went on to rate the impact of the rule on their business)
- identifying potential flatliners (for example, a respondent giving the same response to each question in a list of Likert scale responses)
- checking that survey routing had been applied correctly, so respondents had seen only the questions relevant to them based on their previous answers

D.3 Survey analysis methodology

As described in the phase 1 framework, analysis of the pre-implementation survey data primarily relied on descriptive analysis. This was run separately for each of the goods and passenger operator samples, with breakdowns provided for relevant sub-groups. All analysis was conducted by Frontier Economics using anonymised data.

This involved generating frequency tables in R and choosing an appropriate data visualisation to ensure clarity in the findings.[6]

Statistical testing was conducted to identify statistically significant differences in the views and behaviour of the sample. For example, to identify differences by operator size (measured by fleet size) and whether operators run services in the mainland EU or the Schengen area. The appropriate testing was selected depending on the variable type. Due to limited data on the population of interest, the analysis was conducted without sample weights.

The overall sample size of 435 provides a maximum margin of error of ±4.7% at the 95% confidence level. However, since the sample was based on a census approach rather than proportional representation, these figures are indicative. This means that if 50% of organisations in the overall sample agree with a particular statement, there is a 95% chance that the 'true' value in the overall population is between 45.3% and 54.7%. For goods operators, the sub-sample of 365 is still large enough to draw relatively robust conclusions. However, for the smaller sub-sample of passenger operators (70), more caution should be exercised in any analysis focusing specifically on these operators.

The overall sample size in the quantitative survey was lower than the project team initially anticipated. Anecdotally, from the qualitative research, the time pressures of day-to-day operations experienced by organisations (particularly smaller businesses) may have limited some businesses' capacity to participate. While the project team sought to mitigate this by extending the fieldwork window and offering multiple response options (web and CATI), this

[6] R is a software used for statistical computing, including data analysis.

does not mean the sample will be fully representative of the overall population. Rather, the sample covers the sentiments from a broad range of organisations with different characteristics.

D.4 Qualitative thematic analysis

The thematic analysis conducted for this research was oriented towards identifying responses to key research questions. A coding framework was created based on findings from the initial eight cognitive interviews and expanded throughout the fieldwork period as new codes emerged. Additional codes were added after discussion with DfT. The SYSTRA qualitative research team met weekly to review interview findings, identify commonalities and differences across interviews, and determine which codes applied to the interview findings. These meetings between the researchers provided quality assurance by ensuring a common understanding of codes and themes and by discussing any differences in understanding and analysis. The qualitative research team consisted of one qualitative research lead and two additional qualitative researchers. The conduct and analysis of interviews were divided among these three researchers, and the qualitative research lead reviewed and quality-assured all write-ups, coding, and interview analyses to ensure consistency in approach and analysis quality.



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