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Civitas Portis Work Package ABZ 4

A Final Assessment of Freight in Aberdeen & Aberdeenshire

Survey Results 2020

Nestrans
06/04/2020

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Overview of the respondents & the results

Nestrans is a partner in the North east Freight Forum and works in collaboration with local authorities, business organisations and the haulage industry to improve efficiencies through an agreed Freight Action Plan. Nestrans are leading on the Freight work packages in the Horizon 2020 project Civitas Portis; which is due to complete in August 2020. As part of this project, work has been undertaken to better understand and enhance the efficiencies of freight movement in and around Aberdeen. To inform this work, an initial survey was undertaken in 2018 to seek information from hauliers and to gauge business attitudes. Following the development of the new freight routeing strategy, the launch of the new roads hierarchy and the opening of the Aberdeen Western Peripheral Route (AWPR), this survey was repeated to inform how attitudes and practices have changed since the start of the project. This survey was distributed to members of the Freight Forum, key stakeholders and via other Transport Organisations.

In order to gain insight from a wide variety of hauliers and companies associated with the haulage industry, new contacts that were made during the project were contacted in addition to the extended Freight Forum that was involved as part of the original survey. From this process, there were 15 respondents. This was a reduction from the previous survey, which had 28 responses from 27 companies. Out of the 15 respondents, six had also responded to the original survey, allowing for their answers to be compared. A summary of the respondents is available in Appendix B.

Whilst this represents a lower response rate than previous, this is not necessarily indicative of lower engagement with stakeholders. As part of the project, engagement was maintained and strengthened with a core group of interested members who provided feedback at different stages of the project. From this group, almost all stakeholders responded to the survey. As less time was provided to respond to the survey and given recent global events, there could have also been external factors that impacted on the response rate. It is also possible that, as the survey was a repeat of the original survey with some amendments and additions, some companies may have not felt it beneficial to respond a second time. The conversion rate for this survey was approx. 21% of questionnaires distributed, with a total of 73 views. This is slightly down on the original survey, which had a conversion rate of approx. 25% of questionnaires, with 111 views.

For the most part reasonable conclusions could be formed from answers to the questions, which mainly complemented the findings from the original survey, whilst demonstrating some of the benefits and impacts of the AWPR and the new roads hierarchy.

However, issues that were found as part of the original survey were still prominent in this one, despite steps being taken to edit some of the questions so that they were clearer. Due to this, the information gathered within the survey may need to be taken with caution due to the nature of bias and the potential for human error.

One of the biggest issues was the number of questions that were either only partially responded to, or were not responded to, by all participants who were able to do so. Questions were made optional in order to encourage participation but this has created some difficulty in ensuring confidence in the results. However, there was improvement from the initial survey, with 69% of the questions answered by all participants who were able to do so, compared to 61% in the original survey.

In the initial survey, ‘Fleet Details’ was the section with the highest uncertainty. Whilst there were two operators who did not enter euro-class details and two who entered some details in the incorrect place, this section was answered with more clarity overall and there can be higher confidence in the results, particularly if HGVs and LGVs are considered together.

Out of the 15 respondents, nine were aware of the existence of the North East Freight Forum, with six having previously attended. Additionally, there was good variety in the location of respondents. Whilst 47% listed themselves as being based in Aberdeen and a further 33% in Aberdeenshire; 20% classed themselves as being primarily based elsewhere, with 13% in Scotland’s central belt, and 7% elsewhere in the UK.

Three organisations or companies who responded to the survey did not have the use of vehicles. These have been omitted from the majority of the survey, where questions relate specifically to an operator.

The survey, as well as a summary of the responses, is available as Appendix A.

Fleet Details

It should be noted that the numbers provided do not necessarily add up and some assumptions have been made. Where the number 100 has been entered but this was different than the number of vehicles declared, it has been assumed that this was intended as a percentage rather than a figure. Two operators' euro class information added all vehicles under either HGVs or LGVs. Where it was obvious which euro classification corresponded to which vehicle this has been corrected, otherwise they have been taken together.

Of the 12 companies that declared vehicles, the majority of these were listed as HGVs. Whilst 4% of the vehicles were classed as 'other', no company elaborated on what these vehicles were.

Figure 1: Vehicle Types

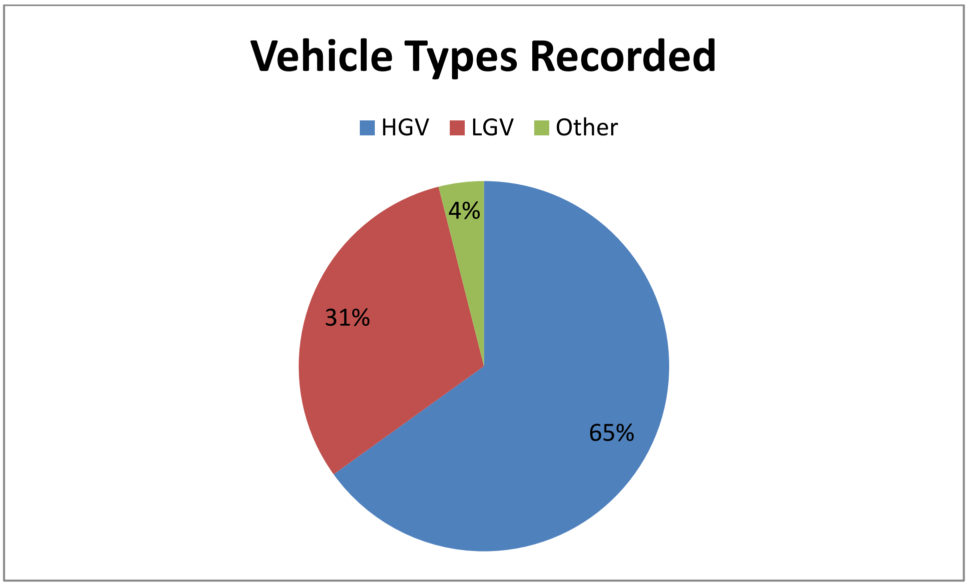
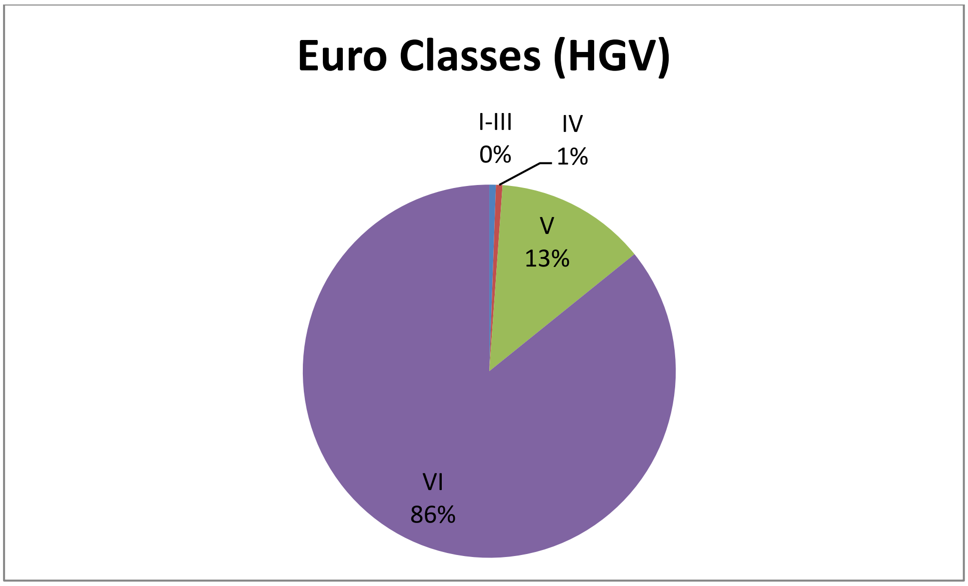
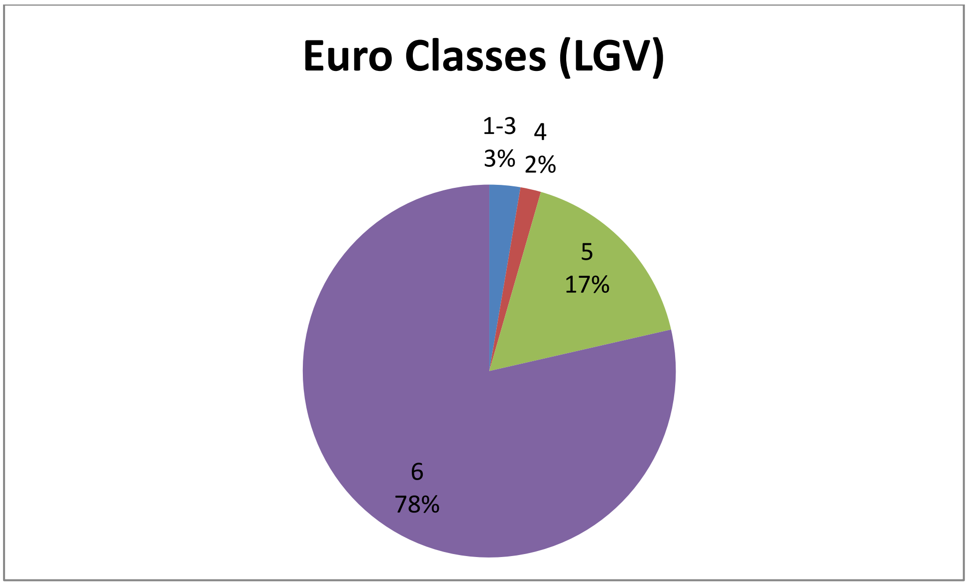


Figure 2: Euro Class – All Companies[1]





All of the companies' fleets were recorded as 100% diesel, which was the same as previous. Looking at the information provided regarding Euro Class breakdowns, both HGVs and LGVs are predominantly Euro VI vehicles. In both cases, the number of vehicles stated to be less than Euro V are minimal, with only two HGVs recorded (out of a total of 176) and five LGVs (out of a total of 112). This represents an increase in the proportion of Euro VI HGVs compared to the 2018 study, although the overall number of HGVs was less due to the smaller number of respondents.

Comparing the responses of the companies who responded to both versions of the survey, five of the six companies answered that they have use of at least one vehicle. Of those five, all recorded fewer HGVs and/or LGVs than previously. However, of those that provided euro class details, all had

[1] Heavy-duty vehicles (HGVs) generally refer to Euro Class categories using roman numerals (I – VI). Light-duty vehicles (LGVs) generally refer to Euro Class categories using Arabic numerals (1 – 6)

increased the number of Euro 6 vehicles in their fleet. In one instance this increase was as high as 67%.

Looking at a breakdown of the companies, it was identified that there were four companies that could be classed as 'large', with a criterion of more than 40 vehicles declared. Eight companies listed fewer than 40 vehicles. This definition will help to assess whether 'larger' companies with more vehicles had different practices and opinions than those with fewer vehicles.

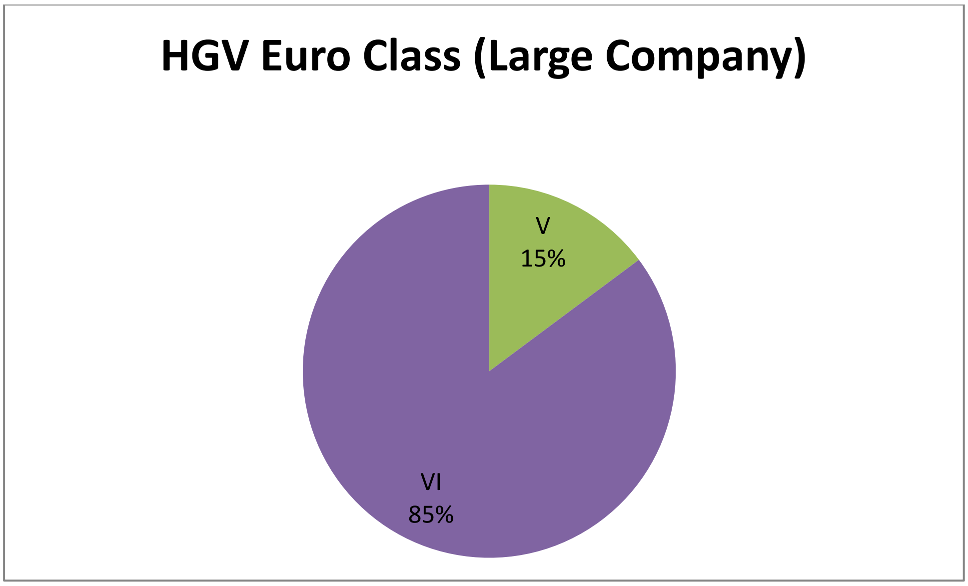
In terms of Euro Class break down, three out of the four companies defined as 'large' responded, with all who responded noting 100% of HGVs registered as Euro V or higher and with two out of three advising that 100% of their HGVs classed as Euro VI. One company registered 67% of their HGVs as Euro VI, although this was up from 0% in 2018. The Euro standards of engines amongst LGVs were equally high with two out of three companies registering 100% of LGVs as Euro 6. One company did not have any LGVs and one company did not provide any Euro Class information relating to their LGVs.

Amongst the companies defined as 'small', there were similarly large numbers of vehicles classed as Euro V or higher. Regarding HGVs, two out of five companies who responded stated that 100% of their vehicles were Euro VI, with all five companies stating they had over half of their vehicles as Euro V or higher. Three companies reported 50% of their HGVs were Euro VI and one company had no HGVs. One company elected not to respond to this part of the question, and another combined their HGVs with their LGVs. This company reported that their HGVs and LGVs combined consisted of 86% of vehicles being Euro V or higher and 50% classed as Euro VI.

Regarding LGVs, there were four other 'small' companies who said they had LGVs and responded to the question. Out of these, three had 50% Euro 5 or higher, with two noting they had 100% Euro 5 or higher. One company had 100% of their vehicles classed as Euro 6 and one company stated that they had no vehicles that were Euro 5 or higher.

As one company combined their LGVs and HGVs into one Euro Class section, it is not possible to determine which vehicle types fall under which Euro Class.

Figure 3: HGV Euro Classes – By Company Size



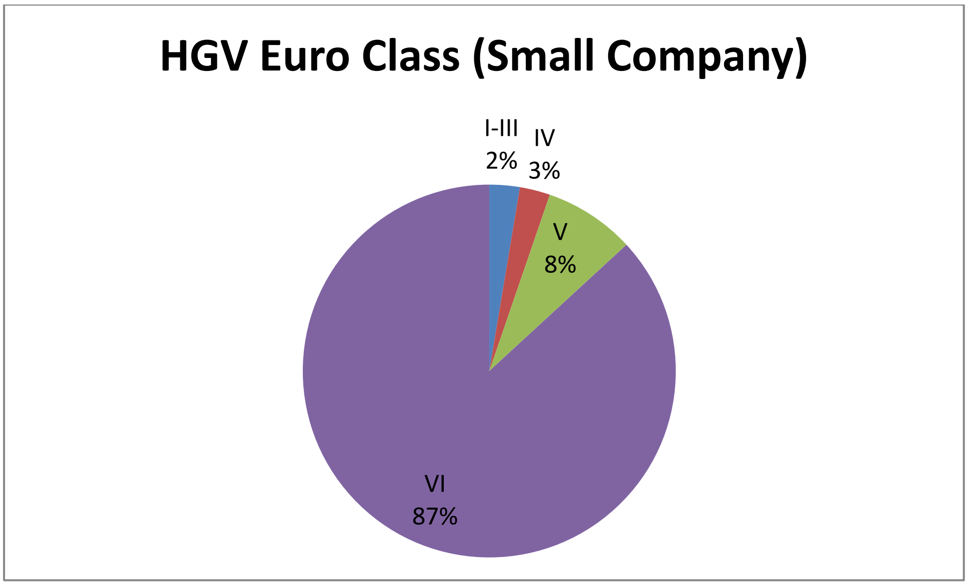
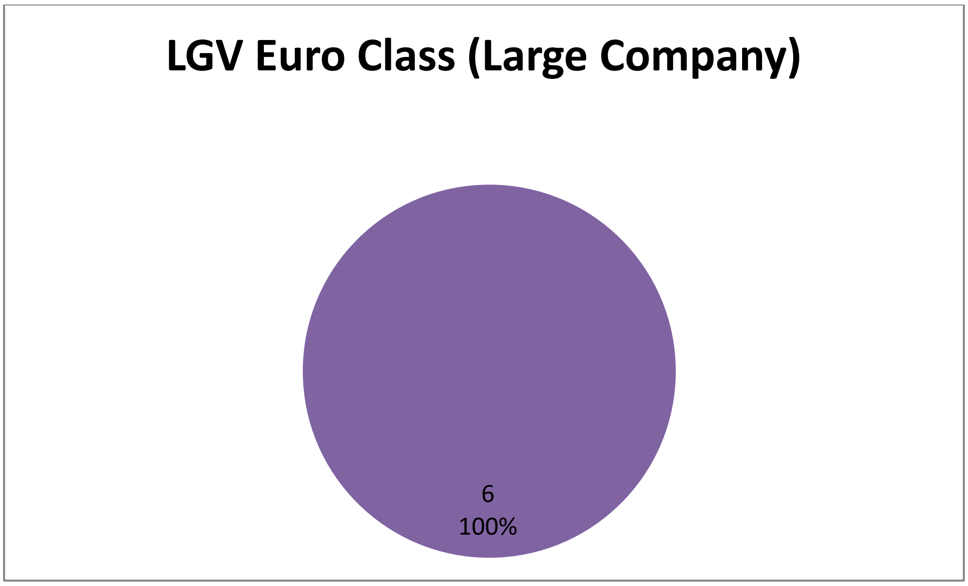
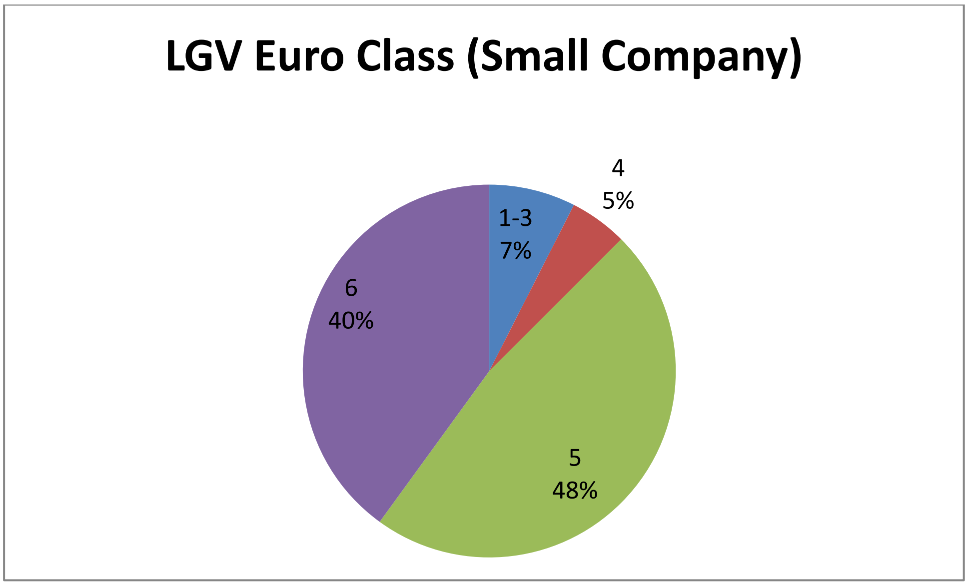


Figure 4: LGV Euro Classes – By Company Size





Looking at the above charts, it is apparent that the companies classed as ‘large’ have a higher proportion of Euro VI vehicles as well as very limited numbers of vehicles classed as under Euro V. For companies classed as ‘small’ the mix is more eclectic, although vehicles classed as Euro V and higher still dominate. It should be noted particularly amongst HGVs that there is little difference between the proportion of Euro VI vehicles stated by both ‘large’ and ‘small’ companies. However, the difference in Euro 6 vehicles is far more pronounced for LGVs.

Of course, this is only from the information that is provided. Whilst this needs to be taken at face value, the small number of respondents means that this needs to be considered as a snapshot rather than as a comprehensive picture. However, the outcomes from this survey do closely correspond to the outcomes from the previous survey, with suggestion that there have been improvements in fleet make-up in the intervening years. Despite this, it cannot be ruled out that there may be more vehicles classed as under Euro V that were not presented in the survey.

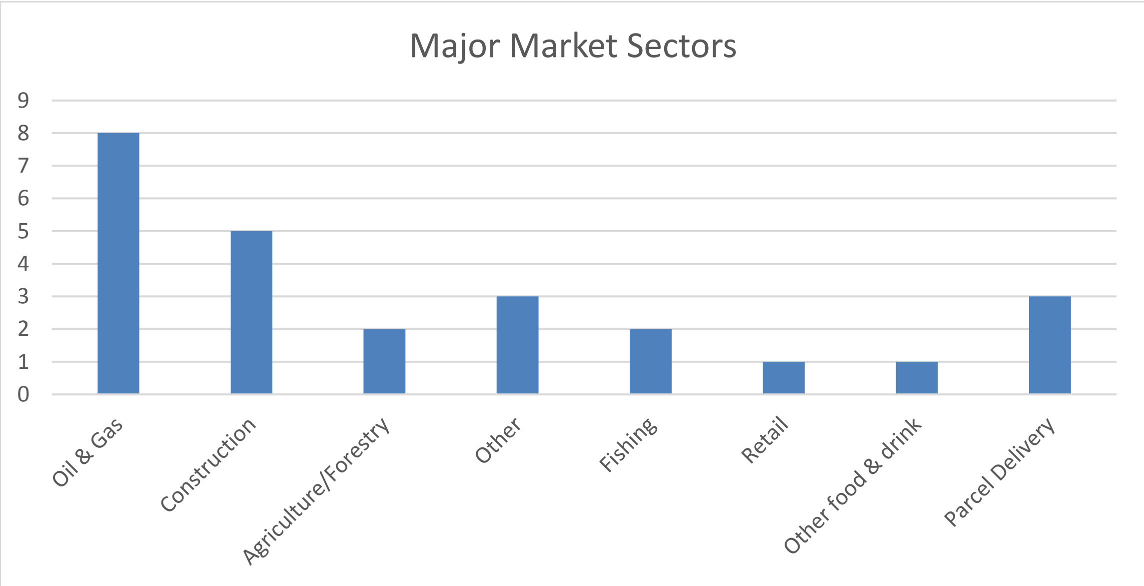
In the survey, fuel type was also provided by all companies, with diesel accounting for 100% of the fuel mix.

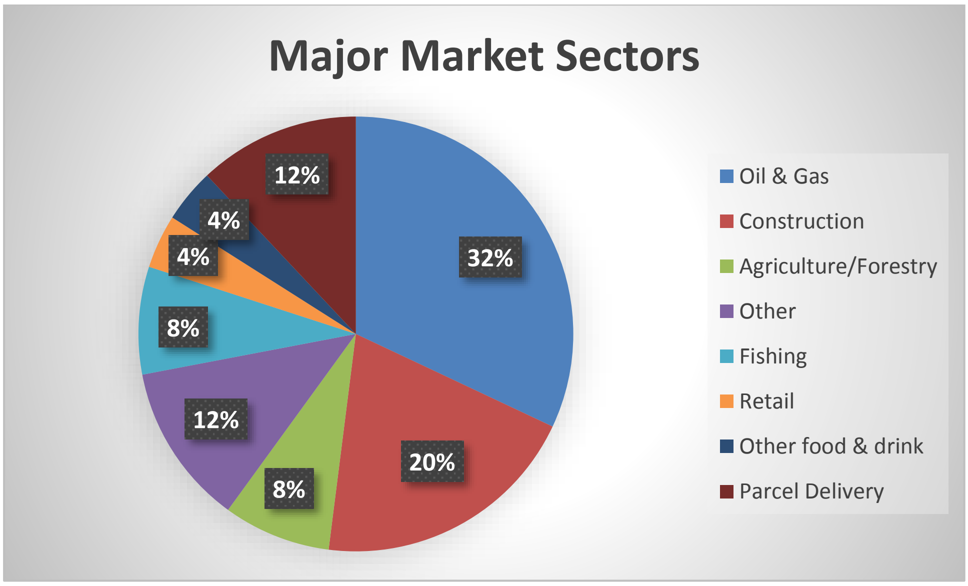
Major Flows

This section was well responded to overall by the 12 companies who classed themselves as having access to HGV/LGV vehicles or similar.

Regarding major market sectors, the majority of companies who responded stated 'Oil & Gas' as one of their key markets, followed by construction. Retail and food and drink ranked lowest, although this could be attributed to the small pool of respondents.

Figure 5

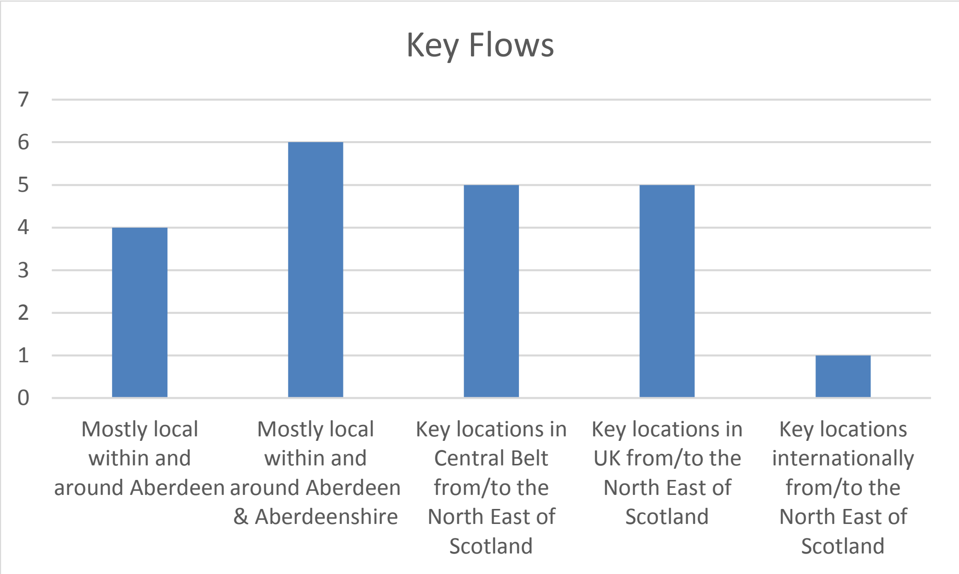


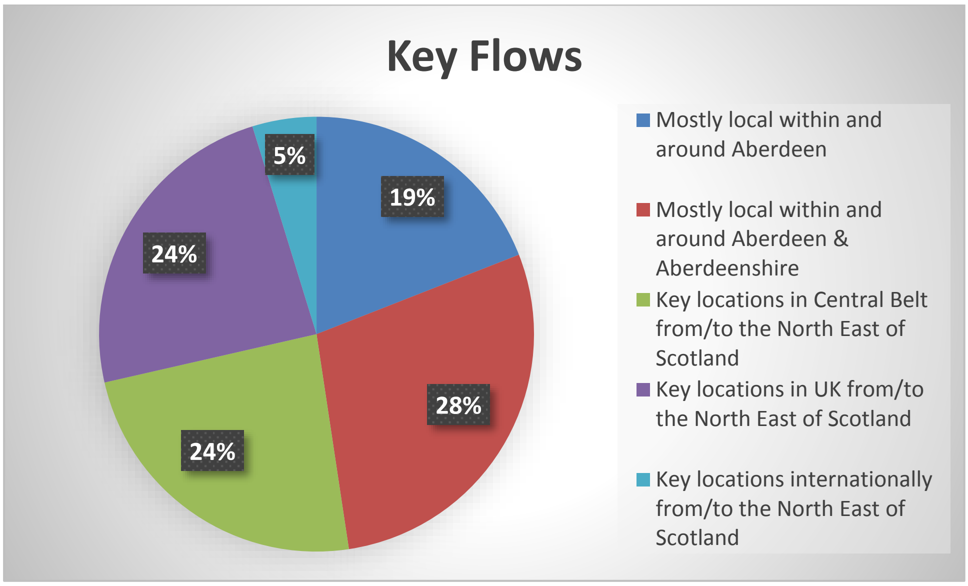


It should also be noted that the majority of companies in the survey (58%) stated that they worked for multiple sectors, although the split was close. This is in comparison to the 2018 survey, where 71% stated that they worked for a single sector.

Regarding key flows, the majority of companies (58%) specified a single location. However, locations were split between each option with the majority of companies specifying a flow that was mostly local within and around Aberdeen and Aberdeenshire. In 2018, the most common flow was between key locations in the UK to and from the North East of Scotland. However, the difference in responses could be partly down to the numbers who responded to the survey and their own locations, which were more focused on Aberdeen and Aberdeenshire than previously.

Figure 2





As seen in the figure above, whilst the largest number of companies mentioned flows that were mostly local within the north east, this was by a slim margin, with only international flows showing limited numbers.

Although there was an identifiable spread in volumes within the 2018 survey, there were few respondents who provided an answer to this question in the 2020 survey. This meant that it was not possible to identify a pattern or trend with the results.

Alternative Transport

The next section of the survey asked respondents to list any additional forms of freight transport that they used in addition to road transport, and whether they would be willing to use other modes of transport to supplement road freight.

In general, the willingness towards alternative forms of transport was low, with 83% of all respondents answering that they would not be willing to use other modes more. There was a lower level of willingness recorded than in the 2018 survey, where 63% were not willing to other modes more.

Figure 7

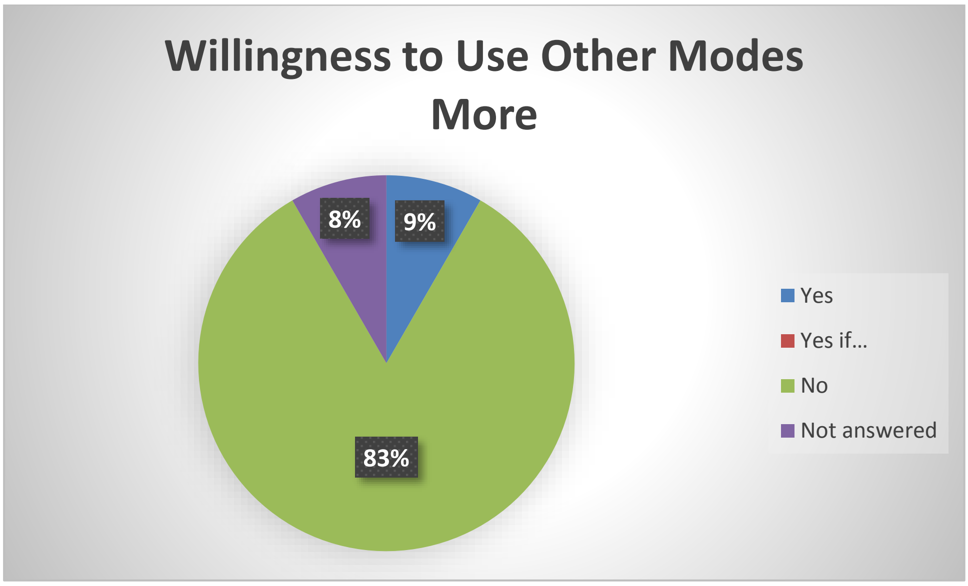
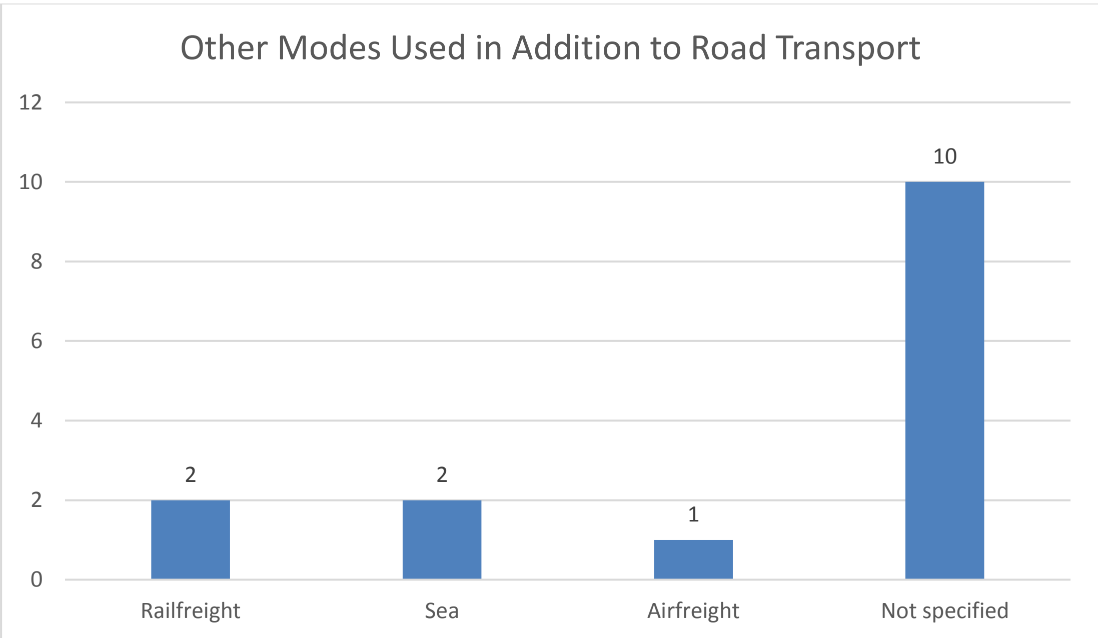


Figure 8

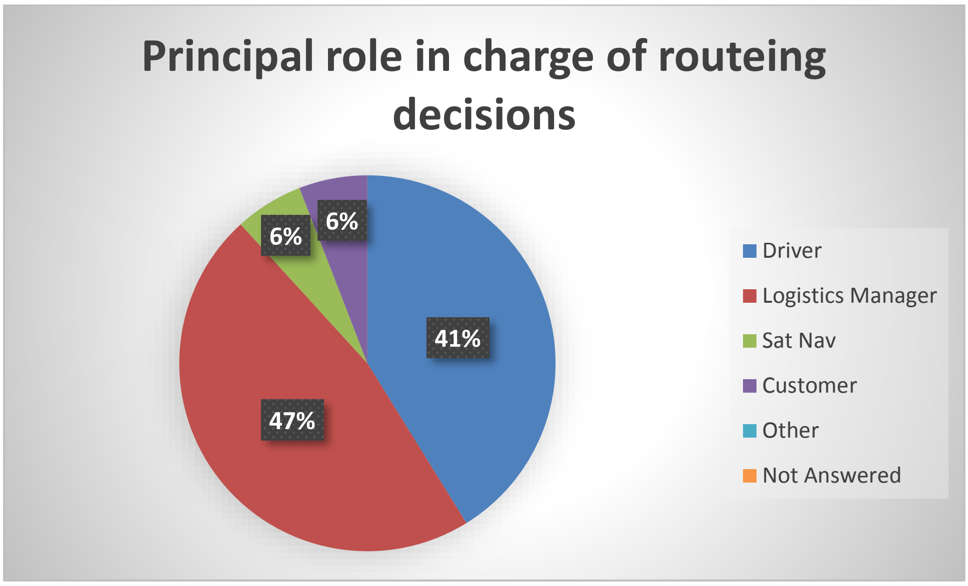


However, it should be noted that two out of 12 respondents did already use at least one other mode of transport in addition to road freight, with one using both railfreight and sea freight in addition to road transport, and the other using railfreight, sea freight and airfreight in addition to road transport. Comments as to why companies would not be willing to use other modes more included that this was not a decision that they could influence, that other methods (particularly rail) would not be suitable for their deliveries due to the restriction in locations served, or that it would not be possible to time the deliveries adequately if another method of transport was used.

Routeing Considerations

This section provided some detail with regards to who makes routeing decisions. Responses suggested that decisions were primarily split between the driver and the logistics manager, with all 12 respondents listing one or both of those options. A higher emphasis was given to the role of the logistics manager compared to the 2018 survey. Only one company listed sat nav and customer as additional players in routeing decisions. This may cause some challenges with regards to taking the new routeing strategy forward. If drivers make the majority of the decisions and are not guided by sat nav, then providing an online or sat nav connected resource for hauliers may have limited benefits. However, as noted within the next section, integration with sat nav systems was still highlighted by some respondents as a positive step forward for disseminating the new routeing strategy. This could suggest that whilst drivers take the majority of decisions with regards to routeing, this is not necessarily without the availability of a sat nav in the cab.

Figure 9

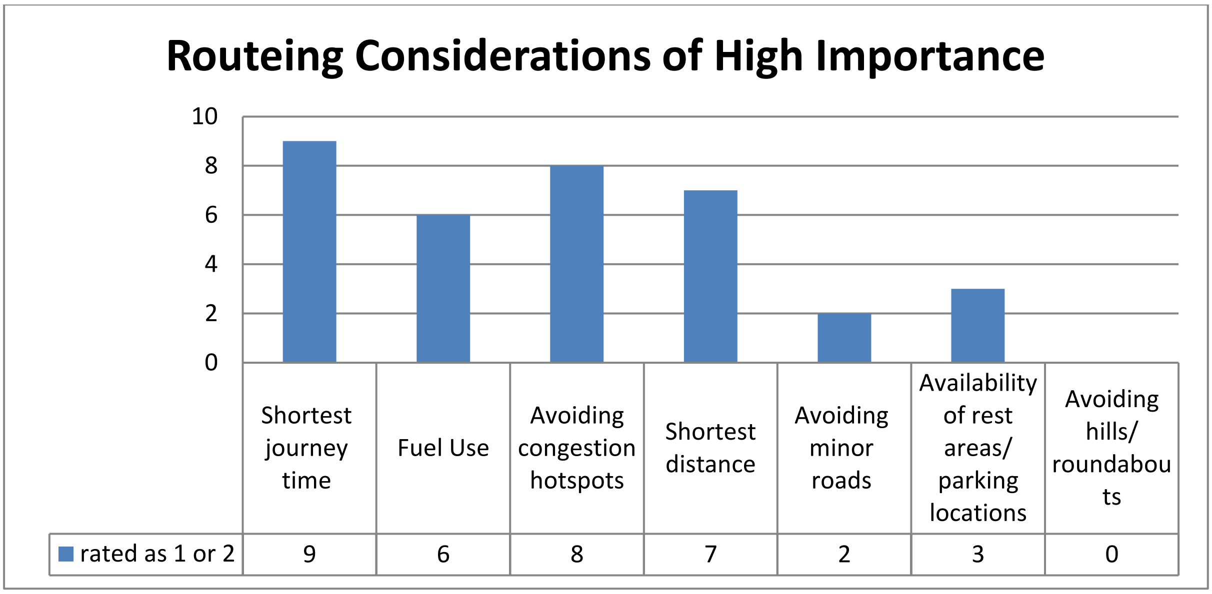


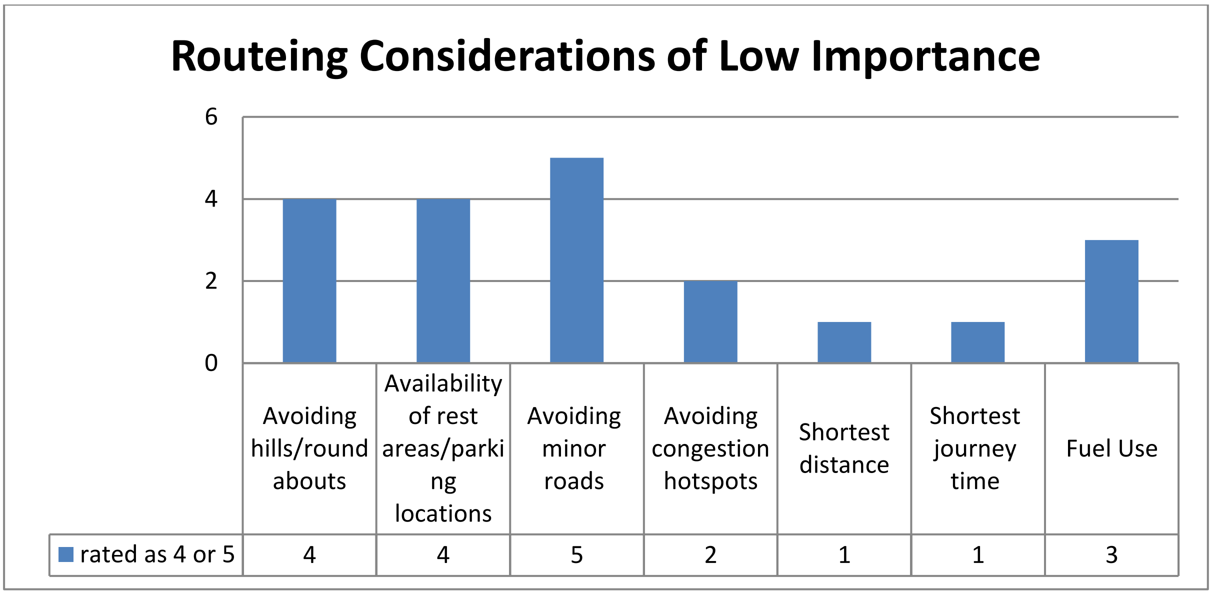
Looking at the importance of factors determining routeing, some assumptions were made in order to make conclusions from the data.

A number of companies rated multiple answers the same, allowing for more than one factor to be given a particularly high or low rating. In order to assess this data, the numbers were put into three bands: 1 and 2 meaning that the factor was particularly important, 4 and 5 meaning that the factor was particularly unimportant, and 3 meaning that the factor did not provide enough of a strong reaction (and so was disregarded).

Using this method, the following graphs were generated, and some clear patterns emerged.

Figure 10





Shortest journey time was rated almost unanimously as being one of the most important considerations on routeing, followed by avoiding congestion hotspots. Alternatively, avoiding hills/roundabouts was not considered by any respondent of having high importance. Avoiding minor roads was considered as being of particularly low importance, followed by the availability of rest areas and avoiding hills/roundabouts.

It should be noted that one respondent only rated three options (shortest journey, avoiding congestion and availability of rest areas) and listed all as a ‘5’. Whilst this has been reflected as such above, it appears likely that the respondent may have confused the question and meant that those three options were of high importance rather than of least importance. However, taking this into consideration would not change the overall result.

Following from this, whilst there are a couple of outliers, the key message was that most companies felt more strongly about what was important to them on the whole, rather than about what was less important. This makes sense given that all of these considerations still have the potential to positively or negatively affect a journey.

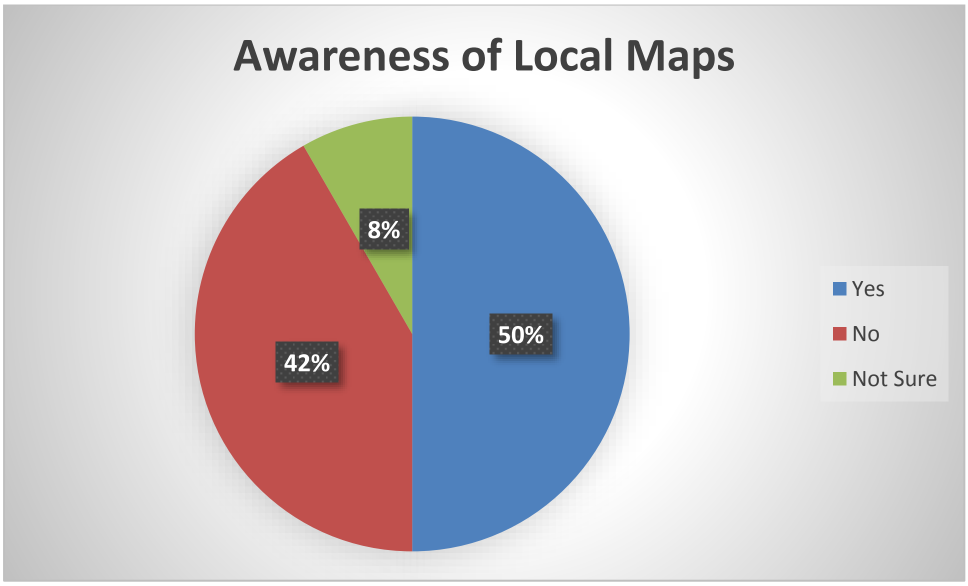
Whilst shortest distance was an important factor, the significance of shortest journey time is also represented in the response to the benefits of the AWPR in the next section.

Whilst there were some small differences in rankings between the 2020 and 2018 surveys, the main outcomes and preferences remained the same.

Route Maps

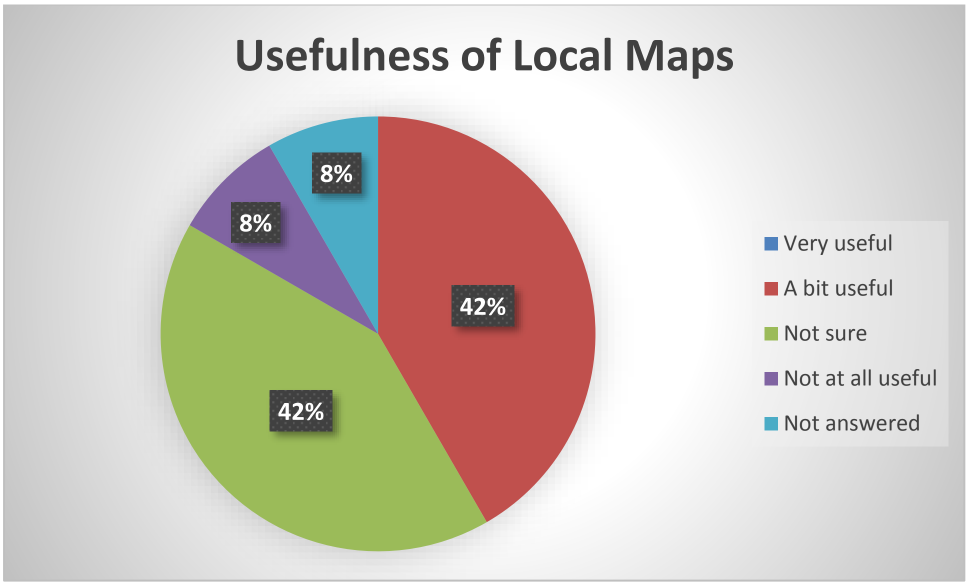
Regarding awareness, the level of awareness has improved on the 2018 survey, despite the smaller pool of respondents, with 50% of all respondents aware of the existence of the route maps, compared to only 21% in 2018. However, this could be due to the number of respondents who were involved with the creation of the new routeing strategy.

Figure 11



Whilst awareness was higher than previous, opinion regarding the use of the maps was more mixed, with five respondents feeling that the maps were useful, compared to another five who stated they were not sure and one company stating that they were not useful. This is likely due to the limited reach that the new maps now have until they are fully published in some form. The company who noted that the maps were not useful highlighted that this is because they have their own system that is more up-to-date, although it would be useful to have maps that were integrated with traffic hotspots. The benefit of them being linked with sat nav or Google maps was also raised by another respondent.

Figure 12



Whilst any specific information regarding routeing was limited, the majority of respondents did agree that they followed the recommended routes either 'all of the time' or 'most of the time'.

Figure 13

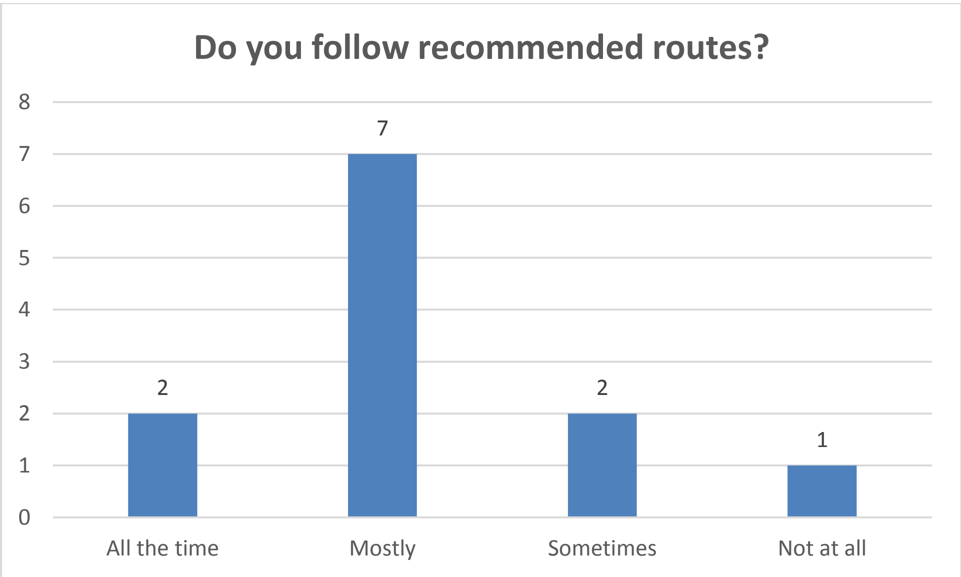
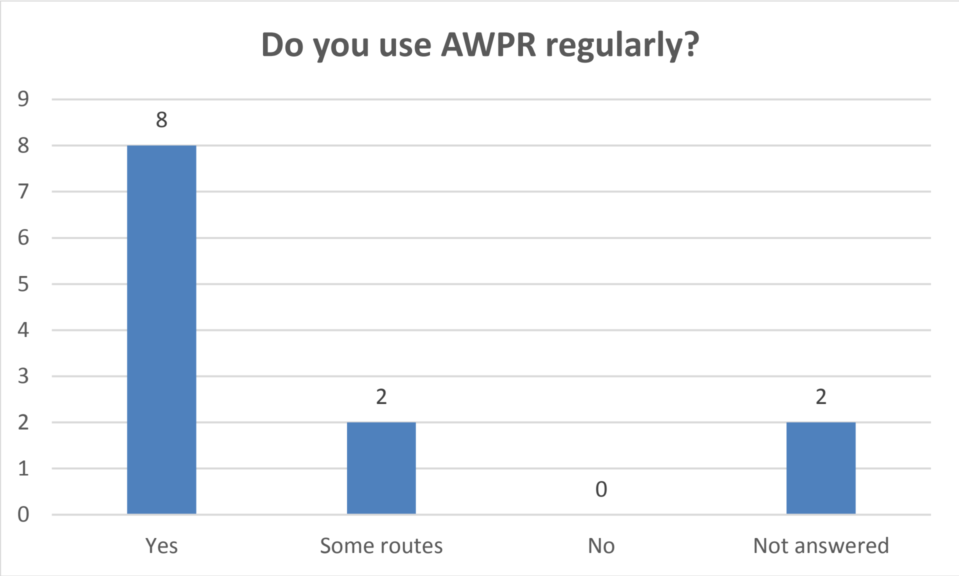


Figure 13



Similarly, the majority of respondents also highlighted that they used the AWPR regularly. In the figure above, yes was marked where comments did not specify any routes that they elected not to use the AWPR for. Two companies added that there were some routes that they preferred not to use the AWPR for, although other companies who did not mention any exclusions may have their own as well. These were Dyce to the harbour (mentioned by two companies) and Bridge of Don to Portlethen (mentioned by one). Journey times and fuel use were identified as the reasons for electing not to use the AWPR for these journeys.

Comments regarding the AWPR were overwhelmingly positive, with comments including the following:

"We use the AWPR as the default route for all of our journeys to and from Peterhead (Aberdeen and South of City)"

"AWPR has been the biggest road improvement in the area since the construction of Stonehaven bypass. We use this daily for all/most routes."

"Yes we do. Cuts travel time north of Aberdeen considerably"

"Yes this has been a godsend when going to the airport and Peterhead."

Besides highlighting some routes where the AWPR was not deemed beneficial, there were no negative comments regarding the bypass.

AWPR & Re-routeing

Regarding the AWPR, a new question was included to determine whether operators had seen any time and/or cost improvements following the bypass opening, and whether these improvements were through using the bypass or by travelling original routes.

Out of the ten companies that responded to the question, nine highlighted time as being the main benefit of the AWPR, with another company noted there had been a benefit, but not specifying further. No company specifically noted a cost improvement. Two companies noted a cost disbenefit due to the overall increase in mileage associated with use of the AWPR.

Specific comments on the impact of the AWPR included:

"We have certainly seen time improvements whether this is using the AWPR or other road users. Cost effects not really as in most cases it costs us more due to longer stretch of road and driving at much higher speeds"

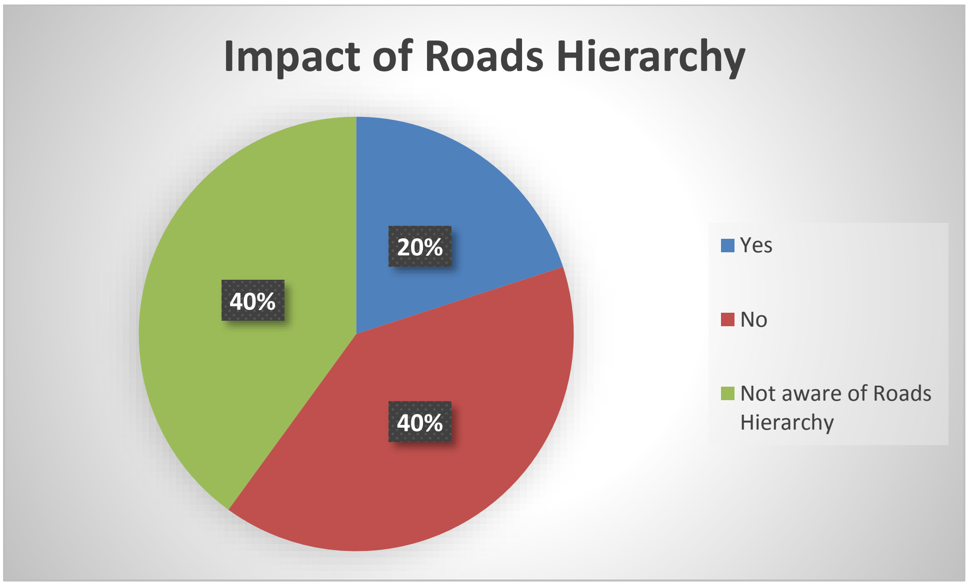
"Transit time to Peterhead has reduced by 12-15 minutes"

"Time improvements but using AWPR can add 12 miles one way on certain routes with the extra fuel costs which we find it difficult to recoup."

"Yes approx. 30-45 mins each way"

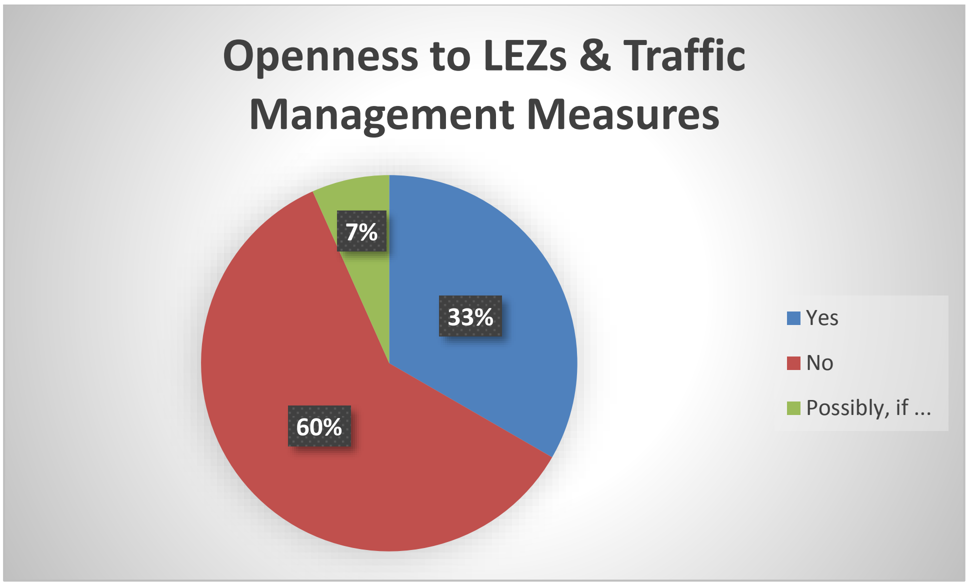
In order to ensure that companies who used freight hauliers but may not have access to vehicles themselves were involved in any routeing process, the rest of the section was opened up to all respondents.

Figure 14



Looking at the breakdown of all responses, awareness of and the impact of the new roads hierarchy and signing strategy was identified as low, with 40% (six) of the responses unaware that there was a new roads hierarchy and signing strategy, and another 40% (six) stating that it had no impact on their routeing.

Figure 15



Openness to the prospect of the City Council introducing a Low Emission Zone (LEZs) and/or traffic management measures was not as positive as in the 2018 survey, with six (40%) respondents open to the prospect of LEZs and traffic management measures, compared to 23 (75%) respondents in the 2018 survey. Not many comments were added, although the following were noted as reasoning for answers:

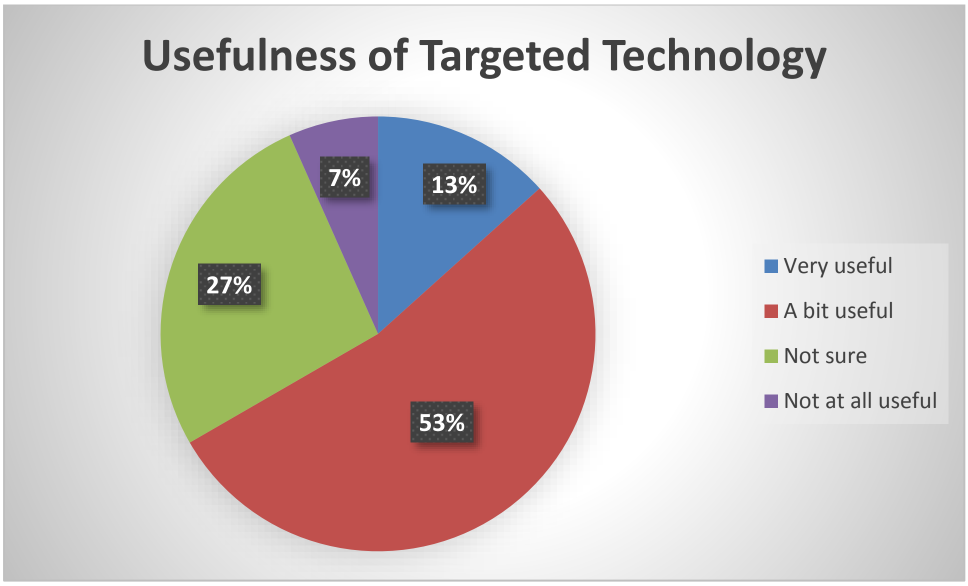
"Town use is still a requirement of our business, LEZ etc would merely be a revenue generating exercise." (answered no)

"Our business does not use such small vehicles" (answered no)

"Access to the harbour for traffic moving to and from the Northern Isles could be safeguarded." (answered possibly, if…)

"It would be difficult to quantify improvements on the Market Street corridor as this is the main route to certain dock areas so there will always be an issue there. Although this is a traffic survey, the ships coming into the basin must contribute a vast amount of pollution which will / would distort figures there." (answered no)

Figure 15

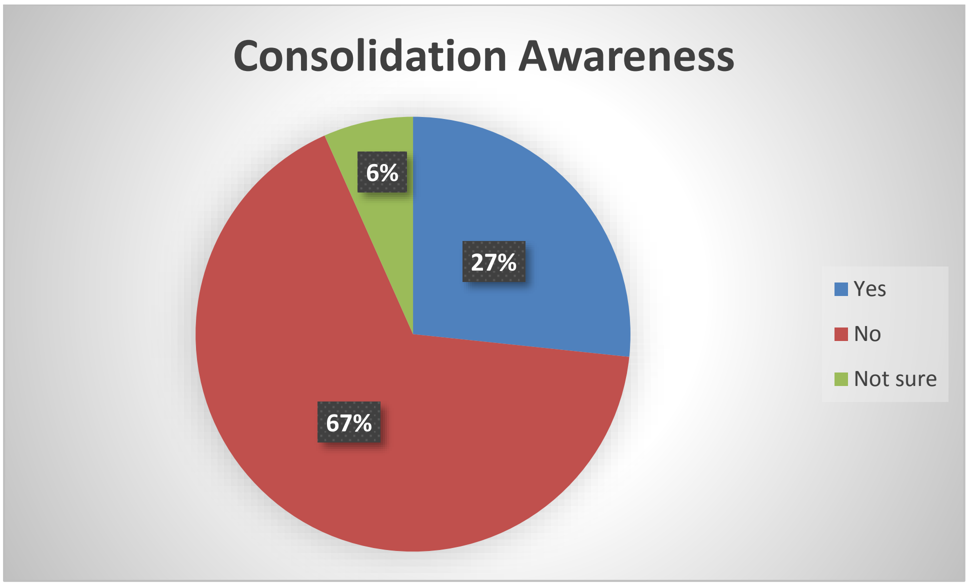


Usefulness of targeted technology was a more mixed response, although over half of respondents (66%) felt that it could be useful. Whilst those marking technology as 'very useful' was lower than in 2018, the results of respondents who answered 'very useful' or 'a bit useful' was similar in proportion to the 2018 survey. Comments noted that companies already have their own technology but would be open to ideas and that it could be useful for people less familiar with the area.

Consolidation and Low Emission Vehicles

As a whole, the prospect of consolidation was met with primarily negative responses, which was similar to the 2018 survey. This is consistent with findings that informed the Distribution Strategy published in 2019, which did not deem a full consolidation centre feasible in the current market. This is also in line with the generally negative responses to physical consolidation centres in studies elsewhere.

Figure 16



The awareness that Nestrans was looking at consolidation as an option for freight was low. This is also consistent with responses to the 2018 survey and will primarily be due to the limited contact a number of operators still have with Nestrans, despite increased effort to improve engagement. It should be noted that out of those who responded to the survey previously in 2018, the majority still responded that they were not aware that Nestrans was looking at consolidation as an option for freight. This suggests that, although engagement with freight operators and stakeholders has increased and improved, there could be further scope for improvements.

Regarding a possible interest in consolidation, 14% of the respondents said ‘yes’ or ‘possibly, if..’, compared to 53% answering ‘no’, and a further 33% answering ‘not sure’. This is consistent with the responses to the 2018 survey and suggests that views have not changed.

Figure 16

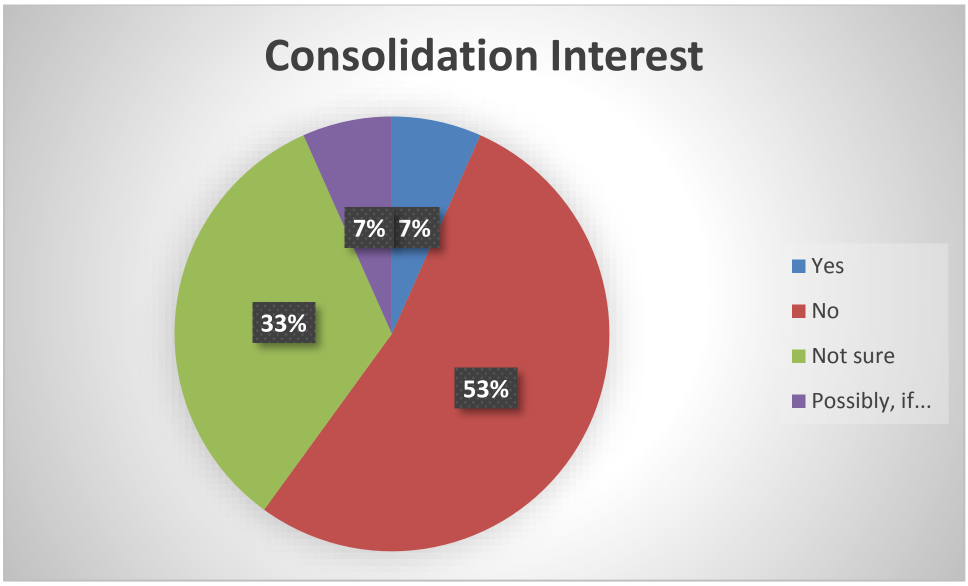
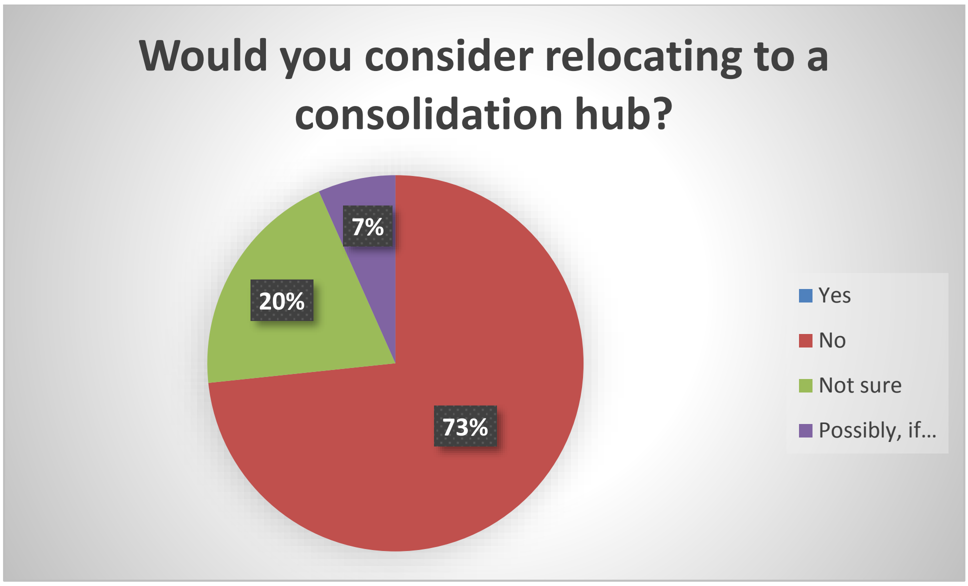


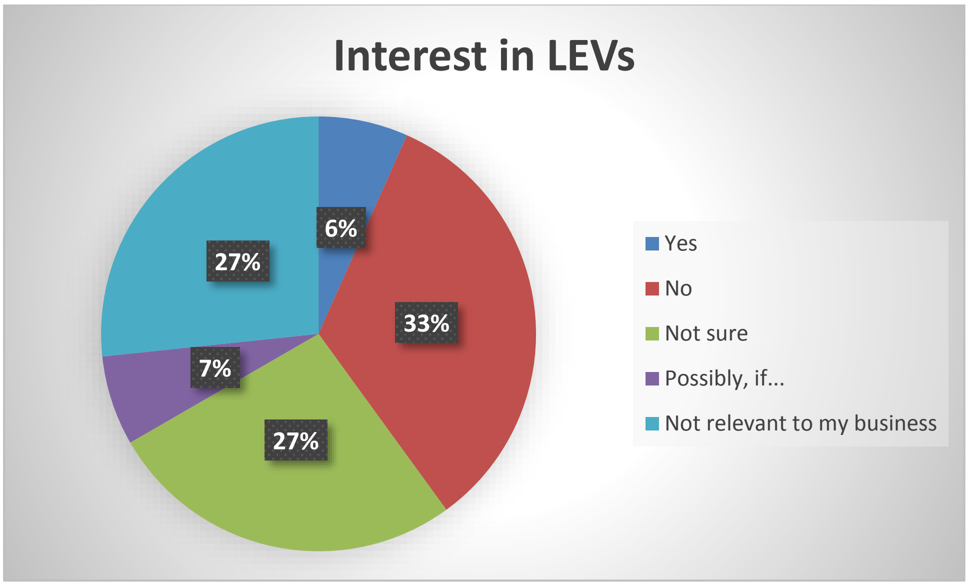
Figure 17



A question was added for respondents to identify whether they would consider relocating to a consolidation hub. Answers to this question suggest that although there may be some interest in consolidation, less respondents were willing to relocate.

Interest in the use of low emission vehicles (LEVs) was mixed but generated a more positive response than consolidation. 34% of respondents were potentially interested in low emission vehicles, compared to 33% who were not interested. It would be useful to confirm why the 27% who felt that it was not relevant to their business felt this way, as it could be that there are options that have not been considered by the respondents. Overall, this is broadly similar to responses to the 2018 survey, despite the lower number of respondents.

Figure 18



There were few comments regarding low emission vehicles, although the following was noted as reasoning for answers:

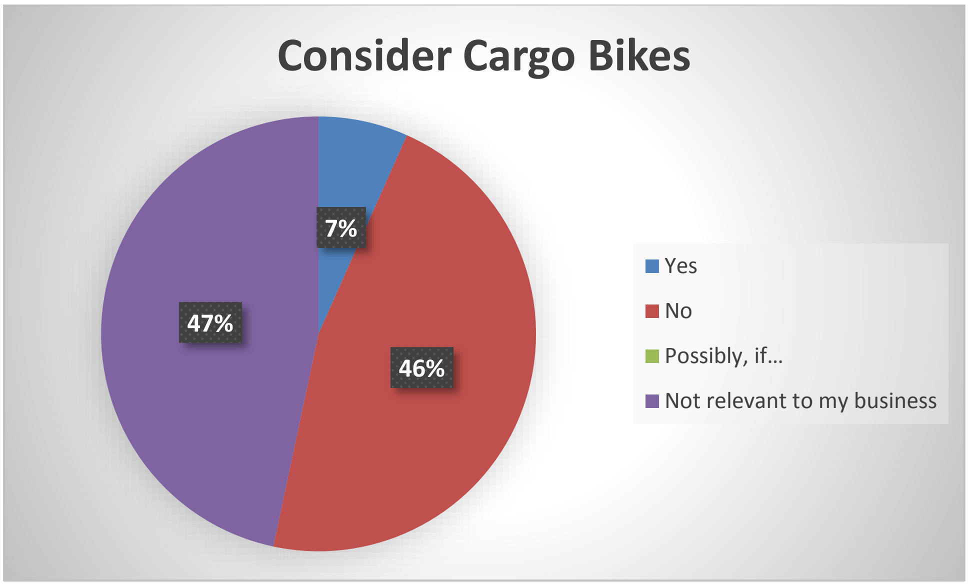
"My concern with a low emission vehicle is if it's held up in a major incident on say the M6, stuck there for 3 hours, will the batteries last that long, i.e. radio on heater on. Will there be enough juice in the batteries to even start the vehicle or do you then need to join a queue of other users waiting to recharge your batteries in the motorway services after being stuck in traffic for hours" (answered possibly, if..)

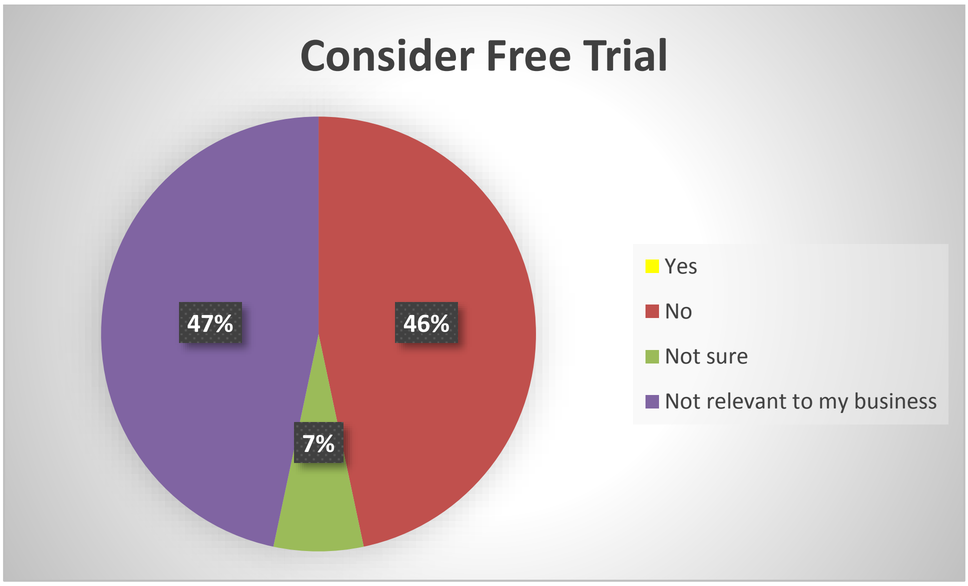
"We are in the process of replacing each truck to euro VI as they come up for replacement." (answered not relevant to my business)

"Not suitable" (answered no)

As Nestrans are currently in the process of running an electric cargo bike trial for businesses in Aberdeen City Centre, two questions were added regarding interest in cargo bikes. It was understood that this would not be relevant to operators only using larger vehicles, but was included due to the survey also being open to retailers and smaller businesses. As the survey was responded to primarily by hauliers with large vehicles, this can partly explain the negative response to the two questions.

Figure 19





One company identified that they would consider using cargo bikes as part of their business, although they were not interested in considering a free trial because they had a similar trial running in Glasgow. Another company said that they would not consider using cargo bikes as part of their business, but were not sure whether they would be interested in a free trial. No further information was available. All other respondents identified that they were either not interested in cargo bikes or a free trial, or that it was not relevant to their business.

Some respondents also included comments. These included:

"Unless anyone hasn't noticed, the streets of Aberdeen are not suitable for this - cycle lanes are bad enough in most areas."

You cannot put a 10 tonne container onto a cargo trike - this question is immaterial/ how much of these are going to be needed to have any effect on things, what is the point of taking 100 small vans *off the road and replacing them with 10000 electric trikes that can only carry a few kilos each – you're only changing the type of congestion not eliminating it..."*

The second comment highlighted that it may have been beneficial to clarify that the cargo bike trial intends to only supplement or replace the use of a van by a company, rather than as a last mile alternative for larger HGV loads.

Respondents were finally invited to provide final comments about consolidation or anything that they felt was important and that had not been covered in previous sections. Whilst one company identified in a previous section that they would not be open to low emission vehicles for last mile delivery, they did comment in this section that they are exploring future options for LEVs. It was also raised by another company that *"Nestrans, businesses and business organisations must be at the front of all these considerations, decisions and time scales for change".* This further highlights the need for Nestrans and the Freight Forum to continue work to increase and improve engagement with the wider freight, haulage and retail community.

Conclusions

As noted previously, it is difficult to form firm conclusions from such a small sample of respondents, particularly with a large variety of industries and sizes. However, a key point that can be taken from this survey is that, overall, hauliers are still not necessarily resistant to change, although this was less pronounced than previously. Part of this could be due to the number of respondents being smaller than previously.

It is unfortunate that, despite the inclusion of more retail stakeholders in the Freight Forum, there were no responses to the survey by retailers as this would have had particular interest, especially with regards to the questions relating to low emission zones and low emission vehicles.

Overall, comparisons with the previous survey suggest that views have not significantly changed since 2018. It may be worth requesting feedback from the Freight Forum regarding the survey, as the number of views of the questionnaire compared to the number of submissions suggests a high proportion of companies that considered filling out the survey but chose not to do so. It would be beneficial to understand why, particularly from those in the sectors that were underrepresented.

Of note is the positive reaction to the AWPR. Given there was trepidation from the Freight Forum prior to its opening, with regards as to how changes to the recommended routeing to incorporate the AWPR would impact their businesses, it is reassuring to see that the bypass has been well received and is being used by operators both to bypass as well as access Aberdeen.

Appendix A: Survey & Responses

Final Assessment of Freight in Aberdeen & Aberdeenshire

General Information

Company Primary Location:

Aberdeen	7
Aberdeenshire	5
North of Scotland	0
Central Belt	2
Other UK	1

Are you aware that Nestrans and the local authorities work in collaboration with freight interests in the north east of Scotland to try and ensure channels of communication and provide a voice for freight (through the North East Freight Forum)?

Have you, or a colleague, attended North East Freight Forum meetings in the past?

15 responded
9 were aware of the North East Freight Forum
6 of those who were aware have previously attended the North East Freight Forum
6 were not aware of the North East Freight Forum

Fleet

For the purpose of clarity, the terms in the following questions are as follows:

HGV = Heavy Goods Vehicles >3.5 tonnes
LGV = Light Goods Vehicles <3.5 tonnes

Do you own, or have use of, HGVs, LGVs or vans?

15 responded
12 respondents own or have use of above vehicles
3 respondents did not own or have use of above vehicles

Approximately how many vehicles in your fleet are based in Aberdeen or Aberdeenshire?

All respondents specified vehicle type			
HGVs:	>100	0	companies
	40 - 99	3	companies
	20 - 39	2	companies
	<20	6	companies
LGVs:	>100	0	companies
	40 - 99	1	company
	20 - 39	1	company
	<20	7	companies
Other:	40 - 99	0	companies
	20 - 39	0	companies
	<20	1	company

Of these, what proportion are of the following fuel type?

All respondents specified fuel mix			
Diesel (total no. of vehicles):	>100	1	company
	40 - 99	3	companies
	20 - 39	1	company
	<20	7	companies
No CNG vehicles			
No LPG vehicles			
No hydrogen vehicles			

Do you know the Euro rating of the engines? Please indicate number in each category.

Total HGVs Euro I-III: 1
Euro IV: 1
Euro V: 23
Euro VI: 151

Total LGVs Euro I-3: 3
Euro 4: 2
Euro 5: 19
Euro 6: 88

2 respondents did not specify Euro class			16.7%
HGVs:	All Euro V +	7	companies
LGVs:	All Euro 5 +	3	companies
3 respondents did not list owning or using any LGVs			

1 respondent did not list owning or using any HGVs

Are you aware of the ECO Stars fleet recognition scheme? *Circle as appropriate*

Aware of ECO Stars	4
Not aware of ECO Stars	8

Are you a member of ECO Stars? *Circle as appropriate*

Member of ECO Stars	3
Not a member of ECO Stars (but aware)	1

Volumes

Can you describe the sectors which are your major markets?

Oil & Gas	8	companies
Construction	5	companies
Agriculture/Forestry	2	companies
Other	3	companies
Fishing	2	companies
Retail	1	company
Other food & drink	1	company
Parcel Delivery	3	companies

Are there key flows which are of particular importance to your business?

Mostly local within and around Aberdeen	4	companies
Mostly local within and around Aberdeen & Aberdeenshire	6	companies
Key locations in Central Belt from/to the North East of Scotland	5	companies

Key locations in UK from/to the North East of Scotland	5	companies
Key locations internationally from/to the North East of Scotland	1	company

Within Aberdeen, are there any key locations? *Circle as appropriate*

City Centre	0	companies
Harbour	3	companies
New harbour (Bay of Nigg)	1	company
Other	1	company

Can you give an indication of annual volumes to/from Aberdeen/Aberdeenshire (ex. over 23 tonnes per annum)?

Under 10,000 tonnes	1	company
Between 10,000 and 49,999 tonnes	1	company
Between 50,000 and 99,999 tonnes	1	company
100,000 tonnes and over	0	companies
500,000 tonnes and over	1	company
Not specified	8	companies
Specified in a different format	0	companies

Mode

Do you use modes of transport other than road transport?

Yes	2	companies
If yes:		
Railfreight	2	companies
Sea	2	companies
Airfreight	1	company
No	10	companies

Would you be prepared to use rail or sea more, and if so what might encourage you to make the shift?

Yes	1	company
Yes if…	0	companies
No	10	companies
Not answered	1	company

Routeing Strategy

Who normally makes the decision on the route that a vehicle will make between pick up and delivery (both directions)?

Driver	7	companies
Logistics Manager	8	companies
Sat Nav	1	companies
Customer	1	companies
Other	0	companies

What are the most important considerations regarding these decisions (please number from 1 = most important to 5 = least important.

Importance of routeing considerations (rated 1 or 2):		
Shortest journey time	9	companies
Shortest distance	7	companies
Avoiding minor roads	2	companies
Avoiding hills/ roundabouts	0	companies
Avoiding congestion hotspots	8	companies
Fuel Use	6	companies
Availability of rest areas/ parking locations	3	companies

Importance of routeing considerations (rated 4 or 5)		
Shortest journey time	1	company
Shortest distance	1	company
Avoiding minor roads	5	companies
Avoiding hills/roundabouts	4	companies
Avoiding congestion hotspots	2	companies
Fuel Use	3	companies
Availability of rest areas/parking locations	4	companies

Route Maps

Are you aware that Nestrans and the Freight Forum has developed local maps with recommended routes, lorry parking facilities and restrictions/constraints on the network?

Yes	6
No	5
Not Sure	1

Do you find such maps useful?

Very useful	0
A bit useful	5
Not sure	5
Not at all useful	1
Not answered	1

Do your company vehicles primarily stick to these recommended routes or not necessarily?

All the time	2
Mostly	7
Sometimes	2
Not at all	1

Do you regularly use the AWPR (the new Aberdeen bypass) to bypass or access areas of Aberdeen or Aberdeenshire?

Yes	8
Some routes	2
No	0
Not answered	2

Those who identified routes they did not use AWPR for were classed as ‘some routes’

Road Hierarchy/Signing Strategy

Have you seen any time and/or cost improvements following the opening of the AWPR?

Yes - Time	9
Yes – Cost	0
Yes – Both	0
Yes - Unspecified	1
No	0
Not answered	2

Aberdeen City Council have developed a roads hierarchy and signing strategy to encourage traffic to travel around the city boundaries, making best use of the AWPR, rather than across the City Centre. Have these changes impacted on your routeing?

Yes	3
No	6
Not aware of Roads Hierarchy	6

Would you support measures to encourage traffic onto the AWPR, such as restrictions in the City Centre, traffic management, Low Emission Zones or similar means?

Yes	5
No	9
Possibly, if ...	1

Do you think that an app, satnav or online tool providing recommended routeing in Aberdeen and Aberdeenshire would be of use?

Very useful	2
A bit useful	8
Not sure	4
Not at all useful	1

Break Bulk / Consolidation

Are you aware that Nestrans and partners have been considering the potential for a distribution hub, where long distance freight could be broken into smaller loads for local delivery?

Yes	4
No	10
Not answered	1

Do you think that such a facility would be of interest to your business?

Yes	1
No	8
Not sure	5
Possibly, if...	1

Would you consider relocating to a consolidation hub?

Yes	0
No	11
Not sure	3
Possibly, if...	1

If a local delivery service was available using Low Emission Vehicles, would you be interested in learning more and considering whether it might be suitable for your business?

Yes	1
No	5
Not sure	4
Possibly, if...	1
Not relevant to my business	4

Would you consider the use of cargo bikes or trikes as part of your business?

Yes	1
No	7
Possibly, if...	0
Not relevant to my business	7

If electric cargo bikes or trikes were available to trial for the purpose of local delivery and/or distribution, would you be interested in learning more and considering whether it might be suitable for your business?

Yes	0
No	7
Not sure	1
Not relevant to my business	7

Appendix B: List of Respondents

Royal Mail	UK
Goldstar	Aberdeen
ASCO UK	Peterhead
hawthorn haulage	Aberdeenshire
Groundwater Lift Trucks	Stonehaven
Environmental ground contractors	North east. Stonehaven
MCM European Ltd Aberdeen	Aberdeen
Broomhall Ltd	Perth
DYCE CARRIERS LTD	DYCE
MM Deerin Transport Ltd	Glasgow
OMYA UK	Aberdeen
Caledonian Logistics Ltd	Kintore
NorthLink Ferries	Aberdeen
SC249952 (Michael Gall Transport)	Aberdeen
Freelands	Altens, Aberdeen