



Views from the Cab: The Working Lives of Heavy Goods Vehicle Drivers in the UK

2024

By Debbie Hopkins, Kaveri Medappa, AC Davidson, Nicky Gregson and Al James



ABOUT THE TRUCKING LIVES PROJECT

The Trucking Lives project is a three-year research programme (2022 - 2025) funded by the UKRI Economic and Social Research Council as part of the Transforming Working Lives portfolio. It is focused on understanding and making visible the everyday work and life experiences of the UK's Heavy Goods Vehicle (HGV) drivers. If you would like to see more about the Trucking Lives project, check out our website at www.truckinglives.co.uk, find us on social media, or email: truckinglives@conted.ox.ac.uk

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TABLE OF CONTENTS

EXECUTIVE SUMMARY	6
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HEADLINE PROBLEMS	8
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CHAPTERS

1.	INTRODUCTION	9
1.1	The UK HGV Driving Workforce	9
1.2	The Trucking Lives Survey	11
2.	THE TRUCKING LIVES SURVEY METHOD	12
2.1.	Developing the Survey Questionnaire	12
2.2.	Sampling and Recruitment of Respondents	12
2.3.	The Survey Sample	12
2.4	Analysis	12
3.	UNDERSTANDING THE LIVES OF HGV DRIVERS IN THE UK	16
3.1.	Impact of HGV Driving Work on Driver Health and Wellbeing	16
3.2.	Compatibility of HGV Driving with Life Outside of Work	19
3.2.1	Caring Responsibilities and HGV Driving	19
3.2.2	Relations with Children, Partner and Friendship Groups	21
3.3	Diverse Work Arrangements in HGV Driving	22
4.	DRIVER EXPERIENCES OF DISCRIMINATION AT WORK	25
4.1.	Everyday Experiences of Discrimination at Work	25
4.2	A Gender Pay Gap in HGV Driving Work?	27
5.	DRIVER ATTRITION AND RETENTION	29
5.1.	When and Why Did Former Drivers Quit Their Jobs?	29
5.2.	Why are Current Drivers Considering Quitting HGV Driving?	32
6.	HGV DRIVER JOB SATISFACTION	36
7.	HGV DRIVER SUGGESTIONS FOR ACTIONS TO IMPROVE THEIR WORKING LIVES	43
7.1.	Employer Actions Needed	43
7.2.	Government Actions Needed	45
8.	CONCLUSIONS AND RECOMMENDATIONS	49
8.1.	Three Intersecting Dimensions of HGV Drivers' Experiences	49
8.2.	A Pathway to Transform HGV Driving Work	55
8.3	Next Steps	55

LIST OF FIGURES

Figure 1.1.	HGV Driver Population in the UK from 2001 to 2022	9
Figure 1.2.	Nominal and Real Wages of UK HGV Drivers from 1997 to 2023	10
Figure 3.1.	Impact of HGV Driving on the Mental Health and Physical Health of Drivers	17
Figure 3.2.	Factors Likely to be Associated with the Mental Health of HGV Drivers	18
Figure 3.3.	Types of Caring Responsibilities Undertaken by Current HGV Drivers by Gender	20
Figure 3.4.	Ease or Difficulty of Combining HGV Driving with Caring Responsibilities	21
Figure 3.5.	Impact of HGV Driving on Current Driver Relations with Children, Partner, Social Life	21
Figure 3.6.	Availability, Awareness and Use of Diverse Work Arrangements by Current HGV Drivers	23
Figure 4.1.	Grounds of Discrimination as Experienced by HGV Drivers	25
Figure 4.2.	Nominal Median Hourly Gross Wages of Full-Time HGV Drivers by Gender	28
Figure 5.1.	Year When Former HGV Drivers Quit	29
Figure 5.2.	Reasons for Quitting HGV Driving	30
Figure 5.3.	Reasons for Quitting HGV Driving (by Age)	31
Figure 5.4.	Reasons for Considering Quitting HGV Driving	32
Figure 5.5.	Reasons for Considering Quitting HGV Driving (by Age)	34
Figure 5.6.	Characteristics of HGV Drivers More Likely to Quit	35
Figure 6.1.	Job Satisfaction Scores of Current HGV Drivers	37
Figure 6.2.	Job Satisfaction Scores Across Socio-Demographic Groups of Current HGV Drivers	38
Figure 6.3.	Factors Affecting Driver Satisfaction with the 'Hours Worked'	39
Figure 6.4.	Factors Affecting Driver Satisfaction with the 'Training Provided'	40
Figure 6.5.	Factors Affecting Satisfaction with the 'Efficiency of Management'	41
Figure 7.1.	Actions to be Taken by Employers to Improve the Work-Lives of HGV Drivers	43
Figure 7.2.	Nominal Wage Rates for All Employees and All HGV Drivers	44
Figure 7.3.	Actions to be Taken by the UK Government to Improve the Work-Lives of HGV Drivers	46
Figure 8.1.	Three Dimensions Affecting HGV Driver Experiences of Work	49
Figure 8.2.	Examples of Experiences at the Intersections of the Three Dimensions	51

LIST OF TABLES

Table 4.1.	Table of Examples of Acts and Sources of Discrimination from Free Text Responses	26
Table 7.1.	Truckers' Words: Employer Actions Needed	45
Table 7.2.	Truckers' Words: Government Actions Needed	47
Table 8.1.	Recommendations	52

LIST OF BOXES

Box 2.1.	Trucking Lives Survey Structure	12
Box 3.1.	Truckers' Words: Contract Types and Work Allocation	19
Box 3.2.	Categories of Care Work	19
Box 4.1.	Truckers' Words: Discriminated for 'Being a Driver'	26
Box 5.1.	Truckers' Words: Reasons for Quitting	31
Box 5.2.	Recruitment, Retention and Pay Rates	33
Box 7.1.	Top 3 Actions for Employers	44
Box 7.2.	Top 3 Actions for the UK Government	45
Box 7.3.	Truckers' Words: Professionalism, Hygiene and Safety	46

EXECUTIVE SUMMARY

Have a look around you; most of what you can see has at some point in its journey to you been transported by truck. The drink in your hand, the seat you are sat on, the monitor on which you're reading this report, even the materials that were used to construct the building you're in – they all likely came on the back of a truck.

We depend on road freight to move a whole host of different goods from ports to warehouses to shops, our homes and offices. Without road freight, construction sites grind to a halt and supermarket shelves run empty.

Road freight in the UK is dependent on a workforce of over a quarter of a million drivers who criss-cross the road network day and night to meet delivery times and prevent supply chain failures. This is an important workforce; without them supplying essential goods, life quickly becomes more difficult.

There has been growing attention paid to what the industry and government have described as a 'driver shortage' – not enough new drivers entering the sector to replace those leaving. The fear is that without these drivers, supply chains will collapse.

The potential of a 'driver shortage' is affected by the narrow demographic characteristics of this workforce, with 98% of UK lorry drivers being male, and 96% white, statistics that haven't altered much over the years. One characteristic that is changing, however, is the average age of HGV drivers in the UK. Currently, 62% of Heavy Goods Vehicle (HGV) drivers are over the age of 45, and the workforce is getting older.

An ageing HGV driver workforce poses a number of challenges for the sector to meet the needs of customers and consumers. The ageing workforce, combined with the 'driver shortage', contributes to current and future concerns about the HGV driving workforce and its capacity to maintain supply chain and service delivery.

Concerns about the number of drivers have motivated a number of sectoral and government interventions to attract women, ethnic minorities and younger people into HGV driving work. But so far, changes have been limited. One reason might be that we know remarkably little about the people who drive lorries. It is difficult to attract and retain new demographics of workers without understanding the experiences of those doing the job already.

This is what the Trucking Lives survey set out to do.

The Trucking Lives survey is the largest and most comprehensive survey of current and former HGV drivers in the UK ever conducted, focused particularly on their work experiences and including a diversity of respondents across socio-demographic and professional characteristics.

In total, the Trucking Lives survey received 1,980 useable responses, of which:

- 1,756 respondents were employed as HGV drivers in the UK (86% male; 97% white; 56% ≥45 years old) when they completed the survey
- 224 respondents had previously worked as HGV drivers in the UK (82% male; 100% white; 78% ≥45 years old)

Our sample allows us to interrogate the specific experiences of HGV drivers across different work contexts (e.g., contract types, hours of work) and personal characteristics (gender, age).

The survey asked questions about workers' experiences of HGV driving, compatibility with life outside of work, health and wellbeing, discrimination, job satisfaction, future intentions and actions to improve working lives.

We found that:

- HGV driving work has a negative impact on many workers':
 - » physical health (54%) and mental health (32%)
 - » social relationships (51%), relationship with partners (35%) and relationships with children (34%)
- Discrimination at work is prevalent on the basis of protected characteristics (e.g., age, gender) as well as 'for being an HGV driver'. This discrimination comes from multiple directions including the public, within haulage firms, at services and at other depots and warehouses.
- Reported job satisfaction is highest in relation to their professional identity and work culture (e.g., the work itself, and their ability to use their initiative), but lower in relation to management and work coordination (e.g., management efficiency, hours worked).
- Over half of current HGV driver respondents had considered quitting in the 12 months prior to completing the survey:
 - » Work-life incompatibility, low pay rates and stress were contributory factors
 - » Drivers with caring responsibilities were more likely to have considered quitting compared to drivers without caring responsibilities
 - » Part-time HGV drivers were less likely to have consider quitting compared to drivers who work full-time hours

The survey data show how experiences of HGV driving work differ across personal and professional characteristics, in particular: gender, age, presence of caring responsibilities and employment contract type.

Some of the experiences reported in the survey are contradictory, for instance:

- Female HGV drivers reported higher levels of job satisfaction than male HGV drivers, yet the data also shows that over half of all female HGV driver respondents had experienced discrimination at work, and female HGV drivers were more likely to be paid below the median salary than male HGV drivers.
- HGV drivers under the age of 30 reported high levels of job satisfaction, yet this age group were more likely than older age groups to have considered quitting HGV driving work due to it being incompatible with their lives outside of work.

Other HGV driver experiences are more consistent:

- Half of current HGV drivers with caring responsibilities (34% of the sample) reported finding it difficult to combine their job and their caring work. Drivers with caring responsibilities also reported negative impacts of the job on their relationships with family and friends, and had the lowest rates of job satisfaction.
- HGV drivers on zero hours contracts reported greater dissatisfaction with the hours they work, and they were more likely than drivers on permanent contracts to have reported negative impacts of HGV driving work on their physical health.

From the findings of the Trucking Lives survey, we suggest that there are three key and intersecting dimensions that inform HGV drivers' experiences of their jobs: (1) the social and professional value placed on HGV drivers, (2) HGV driving infrastructures, and (3) the organisation of HGV driving work. From this, we signal a number of recommendations to transform working lives in road freight.

HEADLINE PROBLEMS

HGV driver shortage: UK firms embark on the long road to plug the gap
theguardian.com Sat 4 Sep 2021

UK haulage industry tells PM to act on supply chains or face Christmas crisis

theguardian.com Mon 25 Oct 2021

Calls for Boris Johnson to intervene personally after 'lacklustre' efforts to tackle lorry driver shortage

'I felt worthless': harassment and violence shut out female truckers amid driver shortage
theguardian.com Thu 7 Apr 2022

Grant Shapps urges more women and ethnic minorities to train as lorry drivers to combat supply crisis

The Standard 24 SEPTEMBER 2021

UK cabinet split over solution to lorry driver shortage
theguardian.com Fri 24 Sep 2021

Meeting on Friday expected to seek compromise over whether to recruit drivers from abroad

THE UK TRUCK DRIVER SHORTAGE HITS CRISIS POINT
Home & News • The UK Truck Driver Shortage Hits Crisis Point
MAGS

HGV shortage: Government so desperate for help it asks 80-year-old retired driver to return to work
NEWS.GU.K October 7, 2021

The hidden life of a lorry driver: long hours, fear of robberies - and living for the weekend
theguardian.com Tue 1 Feb 2022

1. INTRODUCTION

1.1 THE UK HGV DRIVING WORKFORCE

Three and a half million tonnes of goods are transported by GB-registered heavy goods vehicles (HGVs) in the UK each day. These vehicles travel about 53 million kilometres – nearly 20 billion kilometres a yearⁱ

- between factories, ports, warehouses, shops and building sites. The UK, along with many other countries around the world, remains highly dependent on road freight. Over 70% of goods (by tonne kilometres) are transported by roadⁱⁱ. These 'goods' include food, construction materials, medical supplies, and fuels. In short, HGVs keep supply chains moving. The smooth functioning of supply chains keeps supermarket shelves stocked, construction sites building, hospitals able to treat patients, and fuels in petrol stations, in turn enabling better functioning everyday lives for us all.

But who are the people behind the wheel of the HGVs? There is a workforce of between 243,000ⁱⁱⁱ and 270,000^{iv} drivers in UK road freight. The demographic characteristics of this workforce are stark^v:

- 98% of UK HGV drivers are male
- 96% of UK HGV drivers are white
- 62% of HGV drivers are over 45 years old

These narrow demographic trends limit the pool of potential drivers to fill skills shortages described in road haulage as a 'driver shortage'. The need to recruit new drivers is exacerbated by the ageing HGV driver workforce. Between 2019 and 2022, the average age of UK HGV drivers increased from 48 to 51 years^{vi} and the number of HGV drivers aged between 50 and 60 years has doubled since 2006.

These workforce demographics were recognised in 2016 by the UK House of Commons Transport Committee when they set about workforce planning for the road haulage sector^{vii}, and declared that 'The industry needs to be more representative of Black, Asian and Minority Ethnic groups and women. It must do more to encourage young people to become drivers' (p.3).

The number of HGV drivers working in the UK fluctuates (Figure 1.1), but reports of a declining trend since the outset of the COVID-19 pandemic, coupled with supply chain challenges, contributed to widespread concern that there were an insufficient number of HGV drivers in the UK to keep the economy moving. This was described by government and industry as an acute 'HGV driver shortage'.

Figure 1.1. HGV Driver Population in the UK from 2001 to 2021. Source: ONS.



Research from Logistics UK showed that in 2022 over a third of logistics businesses expected a severe or very severe problem with HGV driver recruitment^{vi}. The UK government described the skill shortage as reflective of ‘a lack of long-term investment in the UK domestic workforce’^{vii}, and announced 33 actions to reduce the HGV driver shortage. These actions included efforts to attract new HGV drivers through skills bootcamps and apprenticeships, and to retain the existing workforce through investment in roadside facilities. At the same time, however, some newly qualified HGV drivers took to social media to describe the difficulties they were having to find work many months after passing their tests. This suggests that the reality of working as an HGV driver in the UK vastly differs from the predominant perceptions surrounding this workforce.

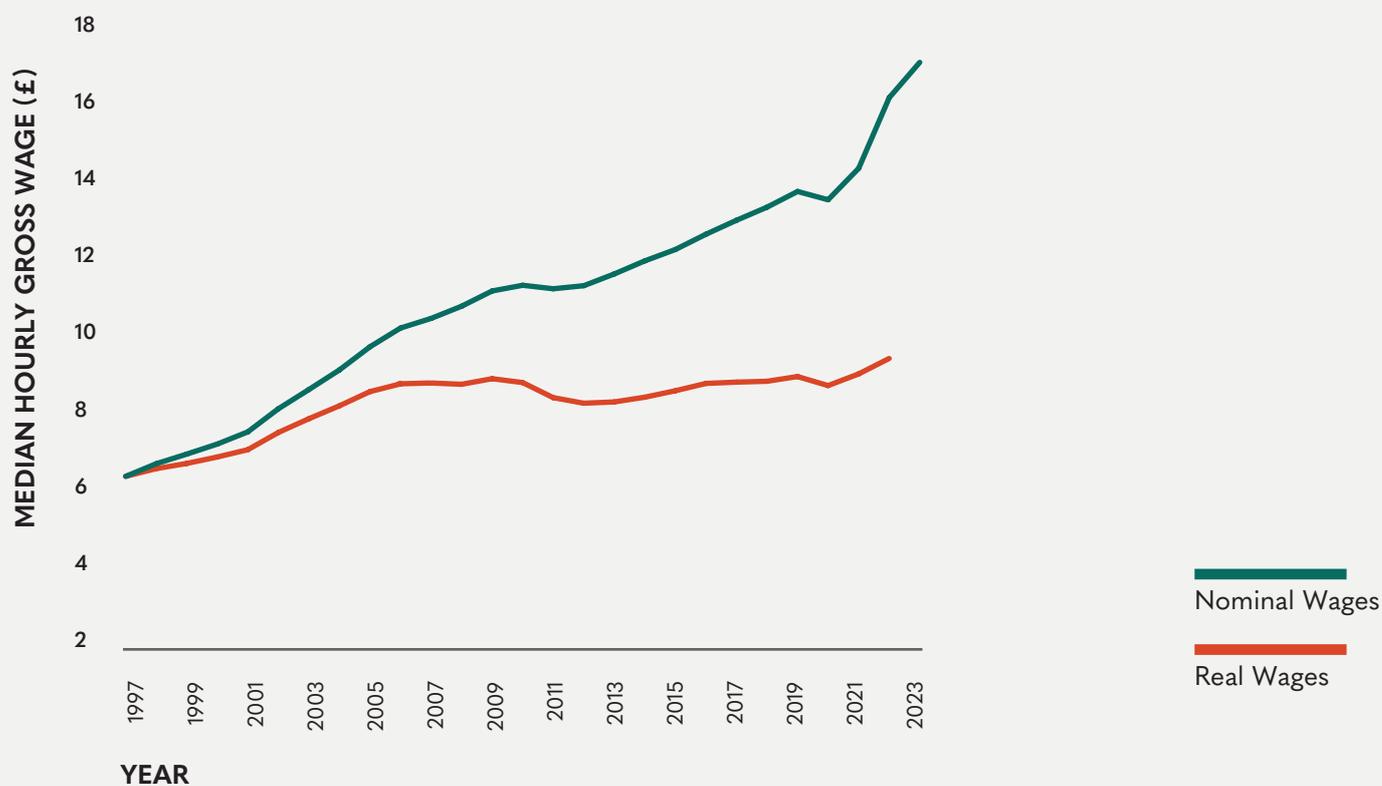
To attract and retain HGV drivers, a focus was put on raising pay rates. Data from the Office of National Statistics (ONS; Figure 1.2) shows that average real hourly payrates (adjusted for inflation) for UK HGV drivers have remained stagnant since the Global Financial Crisis in 2008.^{1viii} While nominal hourly pay increased

in reaction to the ‘driver shortage’, this reflected only a minor increase in real pay due to high inflation rates. At the same time, many HGV drivers – and particularly newly qualified drivers - earn below the median wage.

Besides the demographic characteristics described above and data trends relating to HGV driver numbers and hourly pay, very little is known about the HGV driving workforce, the types of work that they do, and their varied experiences of the job. Since there is no average HGV driving job, with shifts, contracts, tasks, routes varying substantially, assumptions about HGV driving work – including who can do it, and the skills required - rely on generalised ideas about HGV driving work.

The mobile nature of HGV driving work can prevent some people from entering or remaining in this type of work. For instance, the uncertain hours caused by traffic congestion and routing can be incompatible with responsibilities such as picking children up from school. Likewise, the sedentary nature of HGV driving can result in a variety of health issues, compounded by the difficulty in visiting healthcare professionals.

Figure 1.2 Nominal and Real Wages of UK HGV Drivers from 1997 to 2023. ONS Data.



1. The CPIH index were re-based from 2015 to 1997 (1997=100) to calculate the trend in real wages of HGV drivers since 1997. The CPIH index data was accessed from <https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/155o/mm23>

These are just two examples of the ways HGV driving work might be incompatible with life outside of work. This matters for the recruitment and retention of HGV drivers to ensure supply chain sustainability.

1.2 THE TRUCKING LIVES SURVEY

With so little known about HGV drivers in the UK, despite their importance to the sustainability of supply chains, the Trucking Lives project set out to develop new knowledge of this workforce. The project highlights the voices of HGV drivers in discussions on driver recruitment and retention – issues that have been dominated by government agencies and sectoral bodies.

This report presents the findings of a survey of 1,980 current and former HGV drivers in the UK.

Hearing from a large number of HGV drivers provides a better understanding of the varied socio-demographic characteristics of HGV drivers, why people become drivers, the reasons why they leave the job, and what changes they wish to see to improve their working lives. More specifically, in order to transform HGV drivers' working lives for the better, a diversity of HGV driver experiences need to be understood and represented.

The Trucking Lives survey aimed to find out:

- The variety of work contexts and social situations that are experienced by HGV drivers;
- How HGV driving work impacts mental and physical health and social relationships;
- The work arrangements available to HGV drivers (e.g., part-time work and flexitime);
- HGV driver satisfaction with different aspects of their work;
- Factors leading drivers to quit HGV driving or consider quitting the sector;
- Measures to improve HGV driving work that can be implemented by the industry and government.

The report's findings show some of the challenges faced by HGV drivers. The findings also illustrate what the workforce enjoys about the job. At the same time, they highlight how workers experience the job differently. Gender, age and caring responsibilities have important influences over HGV drivers' working lives.

2. THE TRUCKING LIVES SURVEY METHOD

In this section we provide a brief overview of how we developed the survey questionnaire, recruited driver participants and analysed the data we gathered from the survey. For a more detailed report of the methodology, please refer to Appendix A.

2.1 DEVELOPING THE QUESTIONNAIRE

The Trucking Lives survey was designed by the research team, using a mixture of validated and new questions. The questionnaire was developed in consultation with current and former HGV drivers, government agencies and industry stakeholders. Prior to launching the survey, it was piloted by 11 current and former HGV drivers. The survey instrument is available in Appendix B.



BOX 2.1 TRUCKING LIVES SURVEY STRUCTURE

The survey was structured into seven sections:

1. Entry into HGV work
2. Current work and employment conditions
3. Integrating trucking work with caring for yourself or others
4. Health and wellbeing in trucking
5. Quitting HGV driving
6. Actions by the Government and industry to improve workers' lives
7. Demographic information

2.2 SAMPLING AND RECRUITMENT OF RESPONDENTS

The survey followed a non-representative sampling approach as we wanted to highlight the voices of those currently under-represented in the sector including female HGV drivers and drivers from ethnic minority groups, and younger drivers (under 30 years old).

We used a variety of online and offline strategies to recruit a diverse sample. This included posts on social media platforms such as Facebook, Twitter, and LinkedIn, as well as print advertisements in Truck & Driver magazine, and through the Road Haulage Association's newsletter amongst other outlets. The survey was open for responses for 10 weeks between March and May 2023, and was hosted on the Qualtrics platform. Respondents were entered into a prize draw.

2.3 THE SURVEY SAMPLE

The infographics below provide details of the Trucking Lives survey sample. Further details are available in Appendix C.

2.4 ANALYSIS

The analysis presented in this report includes descriptive statistics and regression analyses. Descriptive statistics refers to the use of statistical tools such as frequencies and averages to present or summarise basic characteristics of the data.

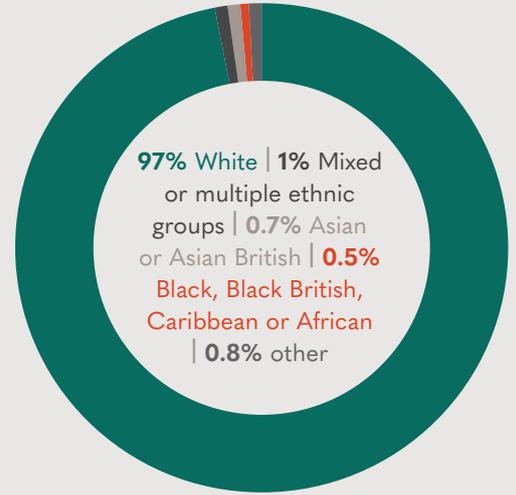
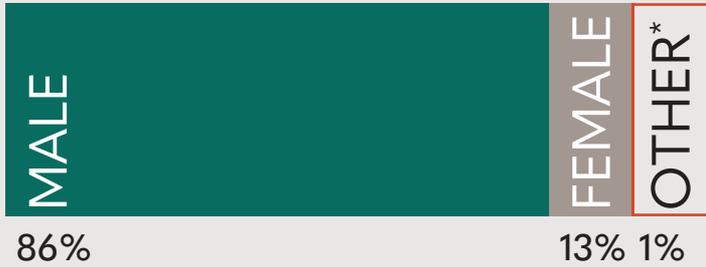
Regression analysis is a predictive statistical tool that investigates the effect of one or more variable/s (known as predictor variables) on a specific 'outcome' or 'dependant' variable. For example, a regression analysis can be helpful to identify and quantitatively measure the impact of socio-demographic (age, gender) and/or job (contract type, hours worked) characteristics (predictor variables) on the mental health of HGV drivers (dependent variable/outcome variable).

Regression analyses help us to understand diverse experiences of HGV driving, and the personal and/or work characteristics which contribute to these experiences. In this report we use two forms of regression analyses: Multiple Linear Regressions and Multiple Logistic Regressions. See Appendix D for more on our regression analyses.

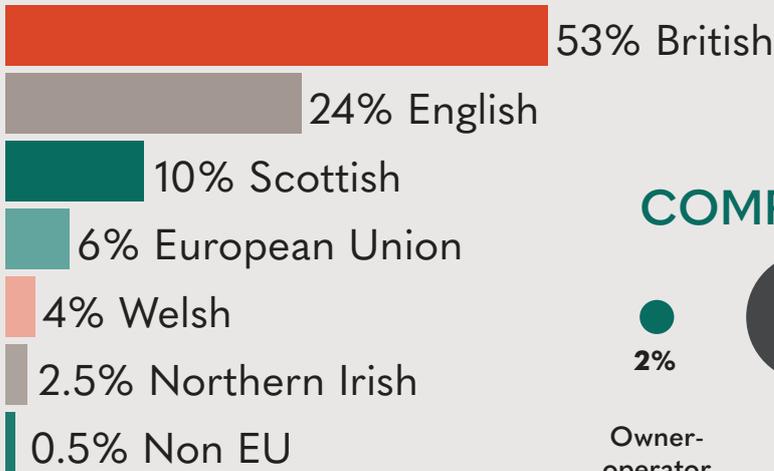


CURRENT DRIVERS

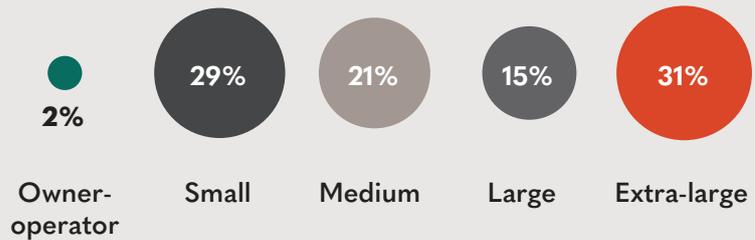
1756 RESPONDENTS



National identity



COMPANY SIZE



88% PERMANENT CONTRACTS 5% ZERO-HOUR CONTRACTS 3% TEMPORARY CONTRACTS 1% TEMP TO PERM 3% NOT APPLICABLE (BUSINESS OWNER)

74%
Married, cohabitating or in a civil partnership

23%
drivers with less than 4 years of experience



82% DRIVE ARTICULATED LORRIES

Average Age: 46

38%
TRAMP**

94% WORK FULL-TIME

34% HAVE CARING RESPONSIBILITIES

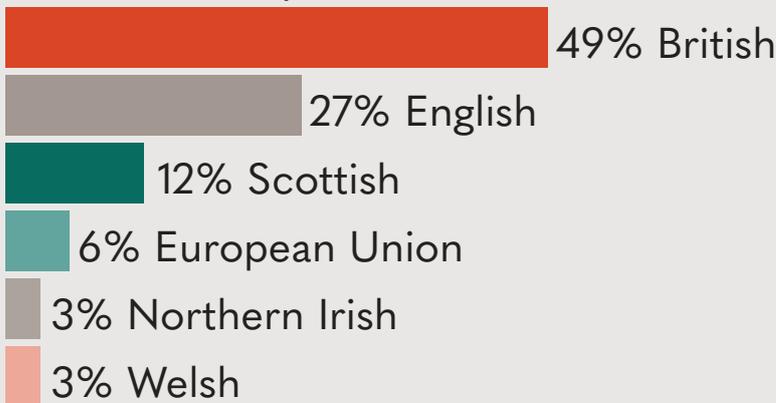
*Respondents could select from male, female, non-binary, other, and prefer not to say. Due to low numbers, and to retain anonymity, the last three categories have been grouped together.
**Sleep in their truck for one or more nights as part of their work pattern.

FORMER DRIVERS

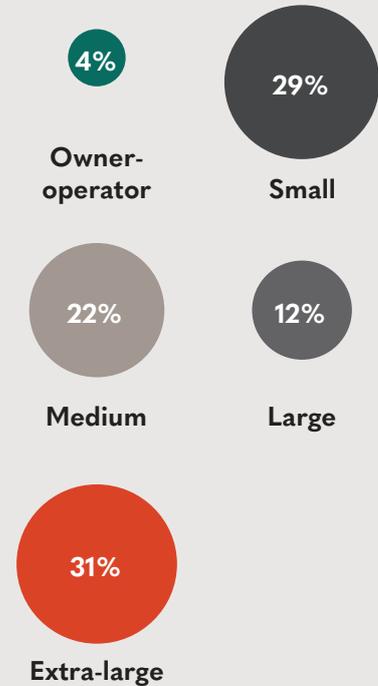
224 RESPONDENTS



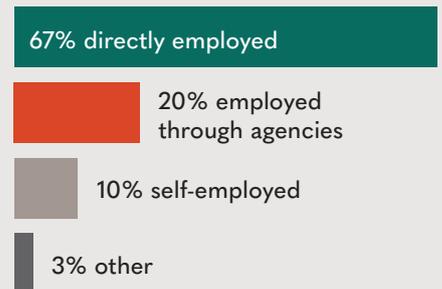
National identity



COMPANY SIZE



66% PERMANENT CONTRACTS **14% TEMPORARY CONTRACTS** **9% BUSINESS OWNER**
7% ZERO HOURS **4% TEMP TO PERM**



78% DROVE ARTICULATED LORRIES

Average Age: 55

40%
TRAMPED**

34% HAD CARING RESPONSIBILITIES

100% White

84% WORKED FULL-TIME

*Respondents could select from male, female, non-binary, other, and prefer not to say. Due to low numbers, and to retain anonymity, the last three categories have been grouped together.
**Slept in their truck for one or more nights as part of their working pattern.

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3. UNDERSTANDING THE LIVES OF HGV DRIVERS IN THE UK

The work HGV drivers do is unique in its mobile nature, with drivers doing a variety of different routes, often taking them hundreds – or even thousands – of miles away from their depot, and their homes. Demands of the job include negotiating traffic congestion, meeting tight delivery deadlines, and adhering to a variety of regulations on their working hours, as well as avoiding the potential dangers of driving a 44-tonne truck.

This can mean that HGV driving work can be stressful and have impacts on the driver's physical health (e.g., creating repetitive strain injuries) and on their personal and social lives outside of work.

In the Trucking Lives project we recognise that paid work is just one part of people's daily lives, but that it can affect the quality of life outside of work. People have personal and social commitments for themselves and for others that they need to fulfil, and the unique features of HGV driving work can make balancing work and life a challenge.

In this section, we explore some less discussed aspects of life as an HGV driver in the UK. We present data which shows the impact HGV driving can have on drivers' health and wellbeing, and their relationships with family and friends.

3.1 IMPACT OF HGV DRIVING WORK ON DRIVER HEALTH AND WELLBEING

Maintaining good mental and physical health is important for individuals, for communities, for society and the economy. However, this can be impacted by, for instance, access to public services, support mechanisms and economic conditions (e.g., the cost-of-living crisis).

Research has shown that prolonged sitting, sleep deprivation and work anxiety are just some of the

conditions associated with HGV driving work^x, and that there is a predisposition for unhealthy lifestyles brought on by long and varied working hours and pressured delivery schedules^x. This makes HGV drivers a high-risk group for conditions including cardiovascular disease, obesity and diabetes. The structure of their working hours can also mean that medical appointments can be missed or delayed.

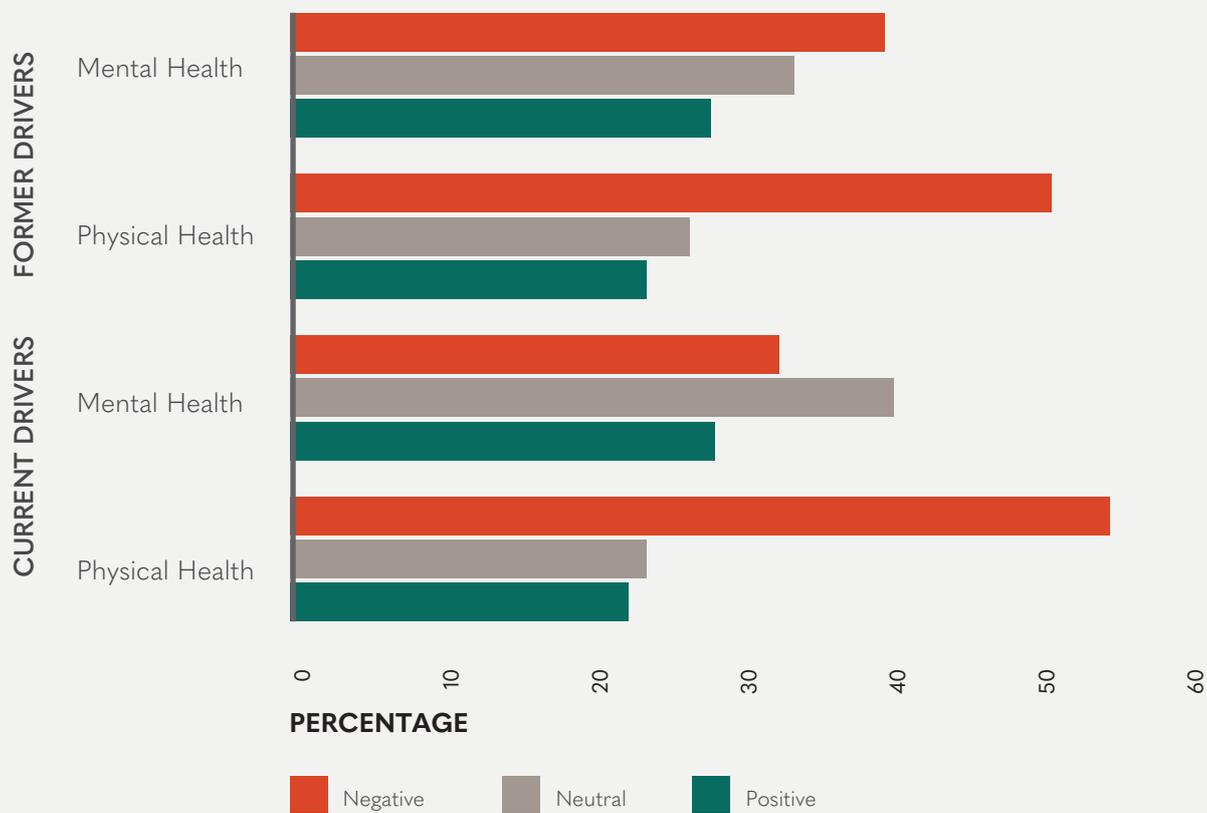
Combined with impacts on physical health, HGV driving and the resultant stress, anxiety and the isolation of the job can have detrimental effects on drivers' mental health. Research from mental health charity Mind, reported by the Road Haulage Association^{xi} found that almost one third of work-related illness in the transport and logistics sector is related to stress, depression and/or anxiety, and that a quarter of UK HGV drivers will experience mental health issues in any given year. Despite growing recognition of this, and organisations focusing on trucker mental health, including the Breaker Breaker charity², stigma remains about discussing mental health.

In the Trucking Lives survey we asked respondents, 'To what extent does your work as an HGV driver positively or negatively affect your mental health?' and 'To what extent does your work as an HGV driver positively or negatively affect your physical health?' Respondents could answer using a 5-point Likert scale from 'positively to negatively'.

Respondents reported stronger negative than positive impacts of their work on both mental and physical health. This was particularly evident for physical health, with over half of our respondents (54% for current drivers; 50% for former drivers) stating that their job had a negative impact on their physical health (Figure 3.1). Around one third of respondents reported a negative impact on their mental health (32% for current drivers; 39% for former drivers). Yet 28% of current HGV driver respondents stated that their work as an HGV driver had a positive effect on their mental health.

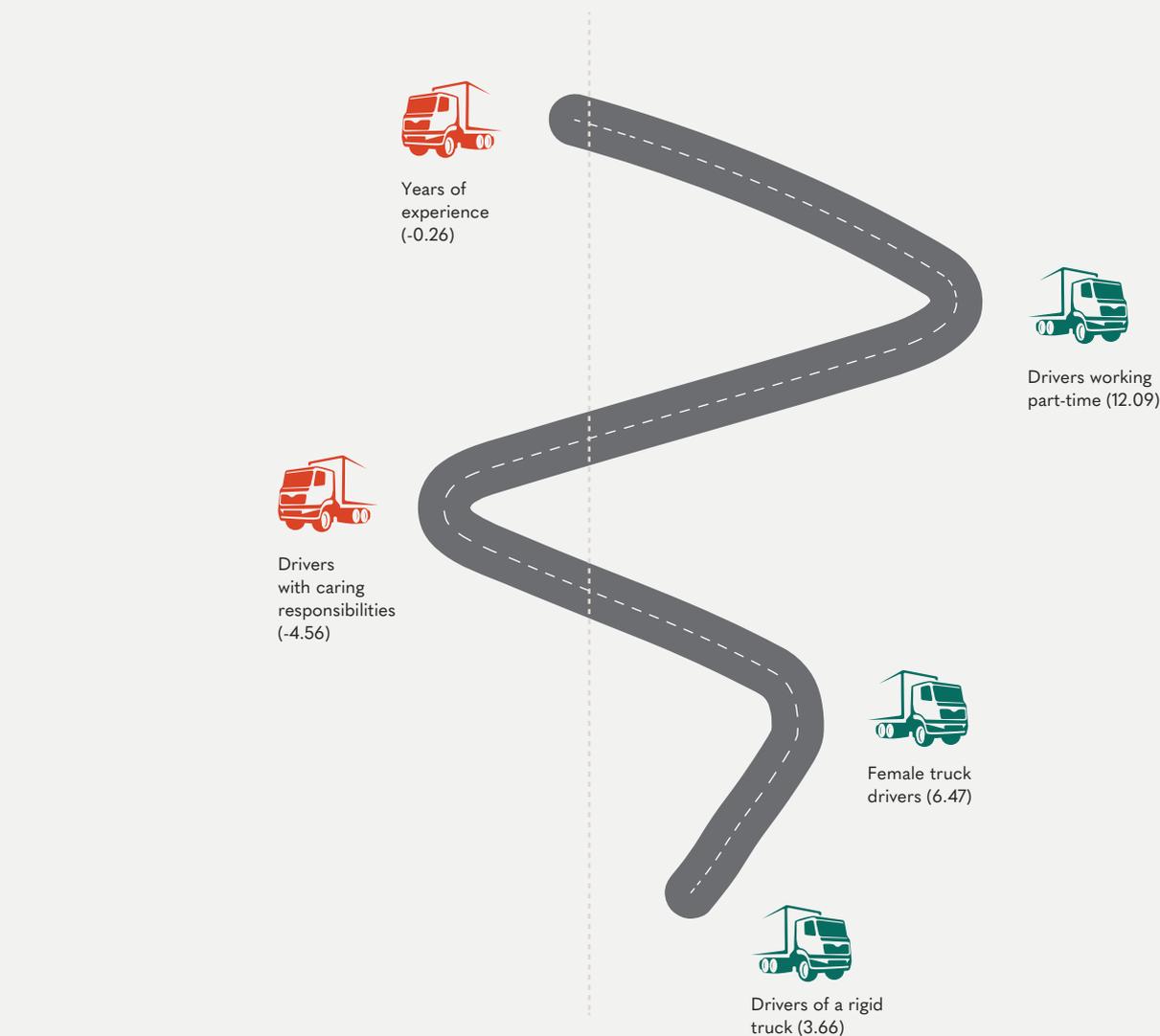
² <https://breakerbreakertruckshow.com/>

Figure 3.1. Impact of HGV Driving on the Mental Health and Physical Health of Drivers



The reported impact of HGV driving work on both mental and physical health varies based on a variety of personal and work characteristics, and analysis shows that some characteristics increase the likelihood of drivers reporting negative mental or physical health outcomes (Figure 3.2).

Figure 3.2. Factors Likely to be Associated with the Mental Health of HGV Drivers



 Factors that can negatively impact the mental health of HGV drivers

 Factors that can positively impact the mental health of HGV drivers

Values in brackets are standardised regression co-efficients of predictor variables that showed high levels of significance at $p < 0.05$.

Figure 3.2 shows that working part-time, being female and driving rigid vehicles increased the likelihood of respondents reporting that HGV driving work improves their mental health. Having caring responsibilities increased the likelihood of respondents reporting that

HGV driving negatively impacted their mental health. The analysis also shows that for every additional year of experience gained by an HGV driver, the likelihood of them reporting a negative impact on their mental health increases.³

³ Result of the multiple linear regression model based on drivers' self-reported scores of the impact of HGV driving on their mental health status. See Appendix D for the detailed results of the multivariable regression model.



BOX 3.1. TRUCKERS' WORDS: CONTRACT TYPES AND WORK ALLOCATION

"Permanent employees usually get easier and shorter runs/ jobs than agency drivers"

Job characteristics can also affect the reported physical health impacts of HGV driving work, with drivers on zero-hour contracts more likely to report negative impacts on their physical health than drivers on permanent contracts ($\beta = -9.76$; 95% CI: -16.02, -3.50)^{xii}. This might reflect different types of work allocated to drivers on different contract types (see Box 3.1).

3.2 COMPATIBILITY OF HGV DRIVING WITH LIFE OUTSIDE OF WORK

HGV driving work is unlike forms of paid work which take place in a fixed workplace. For some drivers, their work is characterised by variable start and end times, long and unpredictable working hours, absence from home for several days in a week or weeks on end, and being always on the move (when not stuck in traffic or waiting to be loaded or unloaded).

These characteristics have a big impact on how HGV drivers manage and experience their lives outside of work, including leisure activities, care responsibilities, and social time with friends and family.

3.2.1 CARING RESPONSIBILITIES AND HGV DRIVING

Nearly three quarters of Trucking Lives survey respondents were married, cohabiting, or in a civil partnership (n=1296, 74%), and most of these were dual income households (n=1077, 83%), resulting in the balancing of two occupations alongside household chores and, potentially, caring tasks (Box 3.2). Single, divorced

or widowed HGV drivers (19% of the sample) may have a different set of responsibilities, for instance as a single parent, or without other forms of household support.

Of current HGV drivers:

- 34% (n=589) had caring responsibilities
- 23% (n=403) had primary caring responsibilities
- 11% (n=190) had secondary caring responsibilities
- 3% (n=57) did not report the type of caring responsibilities⁴
- 90% of respondents with caring responsibilities selected just one category of unpaid care work, 9% reported two categories of unpaid care work, and 1% three categories.



BOX 3.2. CATEGORIES OF CARE WORK

Primary carer: taking lead responsibility for the care of (a) a child or children under 18, (b) a child with disabilities, (c) an adult with disabilities, or (d) an older person (over 65 years).

Secondary carer: another person carries out main caring role.

⁴ A 'prefer not to say' option was offered.

Male HGV drivers reported higher levels of secondary caring responsibilities than female HGV drivers. Male and female HGV drivers reported having primary caring responsibilities more or less equally, except in the case of caring for an older person (Figure 3.3).

Of current HGV drivers with caring responsibilities, 54% reported finding it 'very difficult' or 'somewhat difficult', and just 15% find it 'very easy' or 'rather easy' to juggle the demands of HGV driving work alongside their care responsibilities (Figure 3.4).

Figure 3.3. Types of Caring Responsibilities Undertaken by Current HGV Drivers by Gender

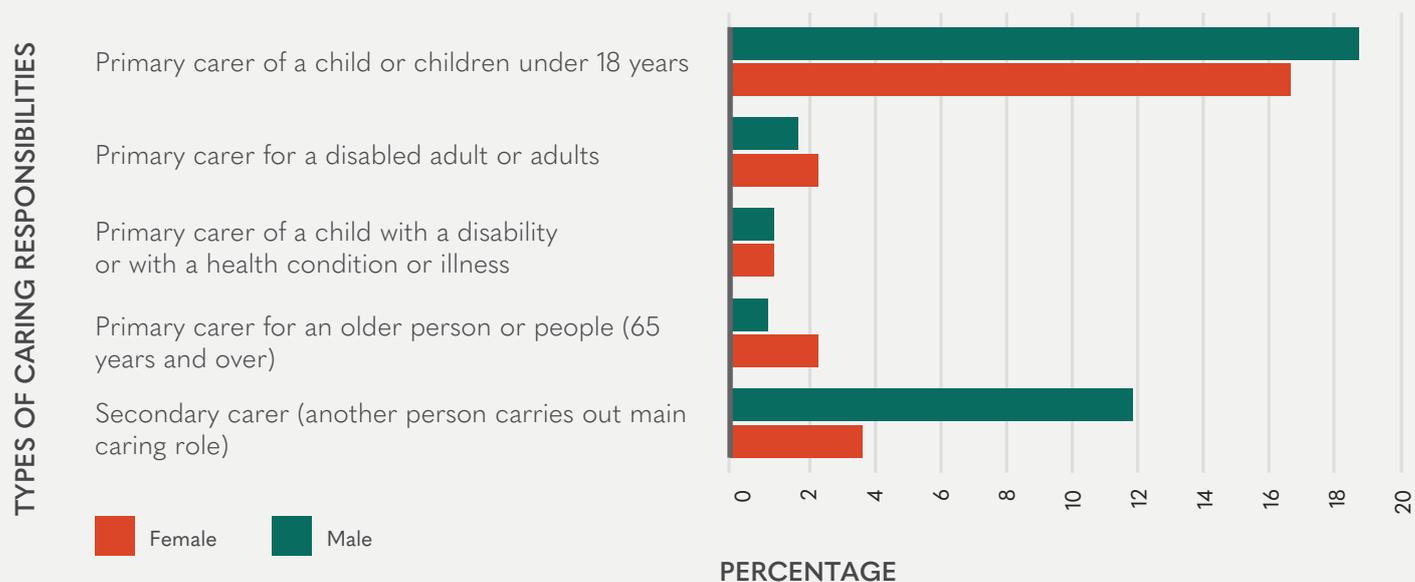
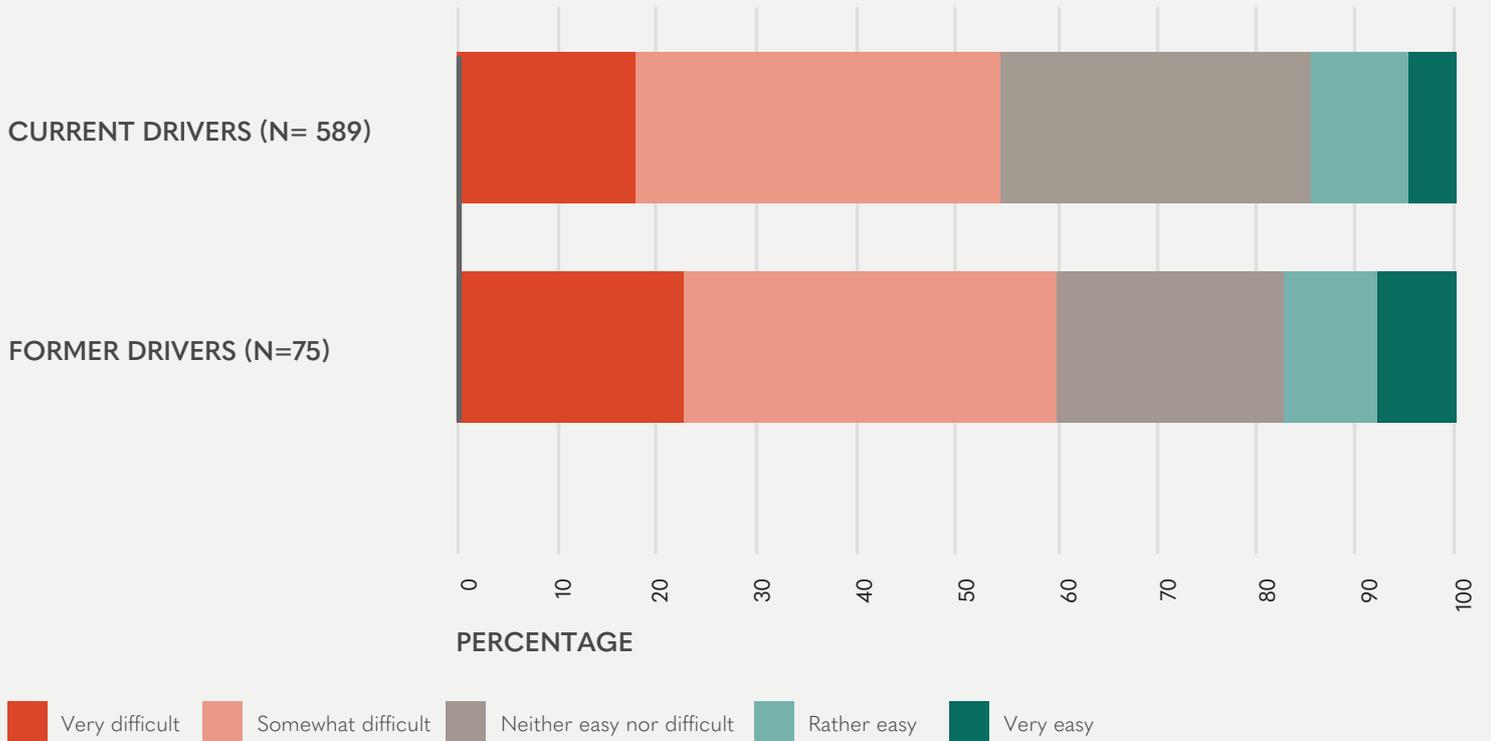


Figure 3.4. Ease or Difficulty of Combining HGV Driving with Caring Responsibilities

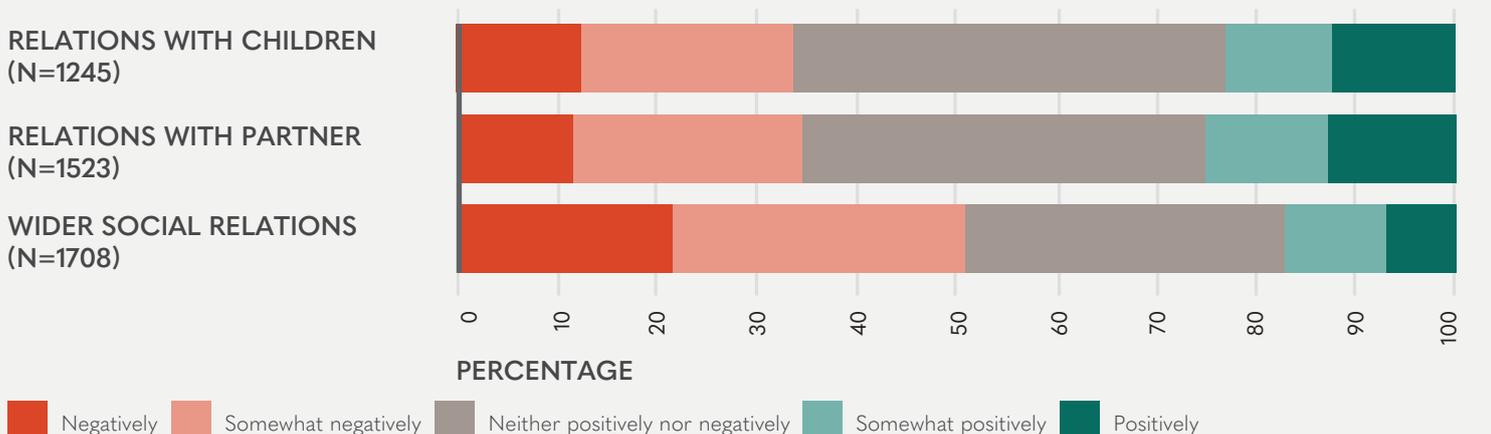


3.2.2 RELATIONS WITH CHILDREN, PARTNER, AND FRIENDSHIP GROUPS

Respondents were asked the extent to which their work as an HGV driver positively or negatively effected their relationships with family and friends (Figure 3.5), with a five-point Likert scale from positively to negatively. A 'not applicable' option was also provided.

Approximately one in three current drivers reported negative impacts of their job on their relationship with their children (34%) and partners (35%). Over half of all current drivers (51%) reported that HGV driving work had a negative impact on their friendships and social life.

Figure 3.5. Impact of HGV driving on Current Driver Relations with Children, Partner, Social Life



Our regression analysis uncovered four characteristics which are associated with the quality of drivers' personal and social relationships:

- Doing part-time work
- Driving a rigid vehicle
- Being a female HGV driver
- Having caring responsibilities

Part-time HGV drivers, drivers of rigid trucks and female HGV drivers were significantly more likely to report *positive* relationships with their family members and friends. However, drivers with caring responsibilities were significantly more likely to report *negative* impacts of HGV driving on their relationships with children, partners and wider social circle.⁵ This suggests that personal and work characteristics influence experiences of HGV driving and its impact on social relations.

3.3. DIVERSE WORK ARRANGEMENTS IN HGV DRIVING

Stereotypical assumptions of work as full-time, Monday to Friday, and taking place within a fixed physical location or a 'workplace' dominate the ways people think about working lives. Yet for many workers – and particularly people working in logistics – work days can be very different.

Many HGV drivers work complex shift patterns which can include early mornings, late nights and weekend work. Our survey respondents work a variety of shifts including⁶:

- Day shifts (73%)
- Night shifts (25%)
- Weekday shifts (30%)
- Weekend shifts (20%)
- 'Four-on-four-off'⁷ (5%)

Almost 40% of current driver respondents reported spending one or more nights away from home a week, known in the sector as 'tramping'.

These shift types can help to explain the reported difficulty balancing HGV driving work with caring responsibilities and the negative impacts the job can have on different relationships. It is therefore important to consider how work as an HGV driver can be reconfigured to become compatible with drivers' rights to fulfilling personal and social lives.

Modes of working that are available to other occupations, such as working from home, are impossible for HGV drivers. Yet there are different work arrangements which offer greater levels of flexibility for drivers and fit with responsibilities and lives outside of work.

In the Trucking Lives survey, we asked respondents about their awareness and use of 8 work arrangements:

- Part-time work
- Term-time working
- Job share
- Flexitime
- Reduced hours for a limited time
- Compressed working week
- Annualised hours
- Employer assistance with childcare

⁵ See Appendix D for the results and discussion of the multiple linear regression on drivers' relationship with their children, partner and wider social circles

⁶ Respondents could 'select all that apply' and therefore many selected multiple options to reflect the diversity of shifts they may work..

⁷ 'Four on Four Off' involves four consecutive days of work then four days of holiday, this includes weekdays and weekends.

We found that most current HGV driver respondents either did not have the work arrangements available to them, or did not know if they were available (Figure 3.7).

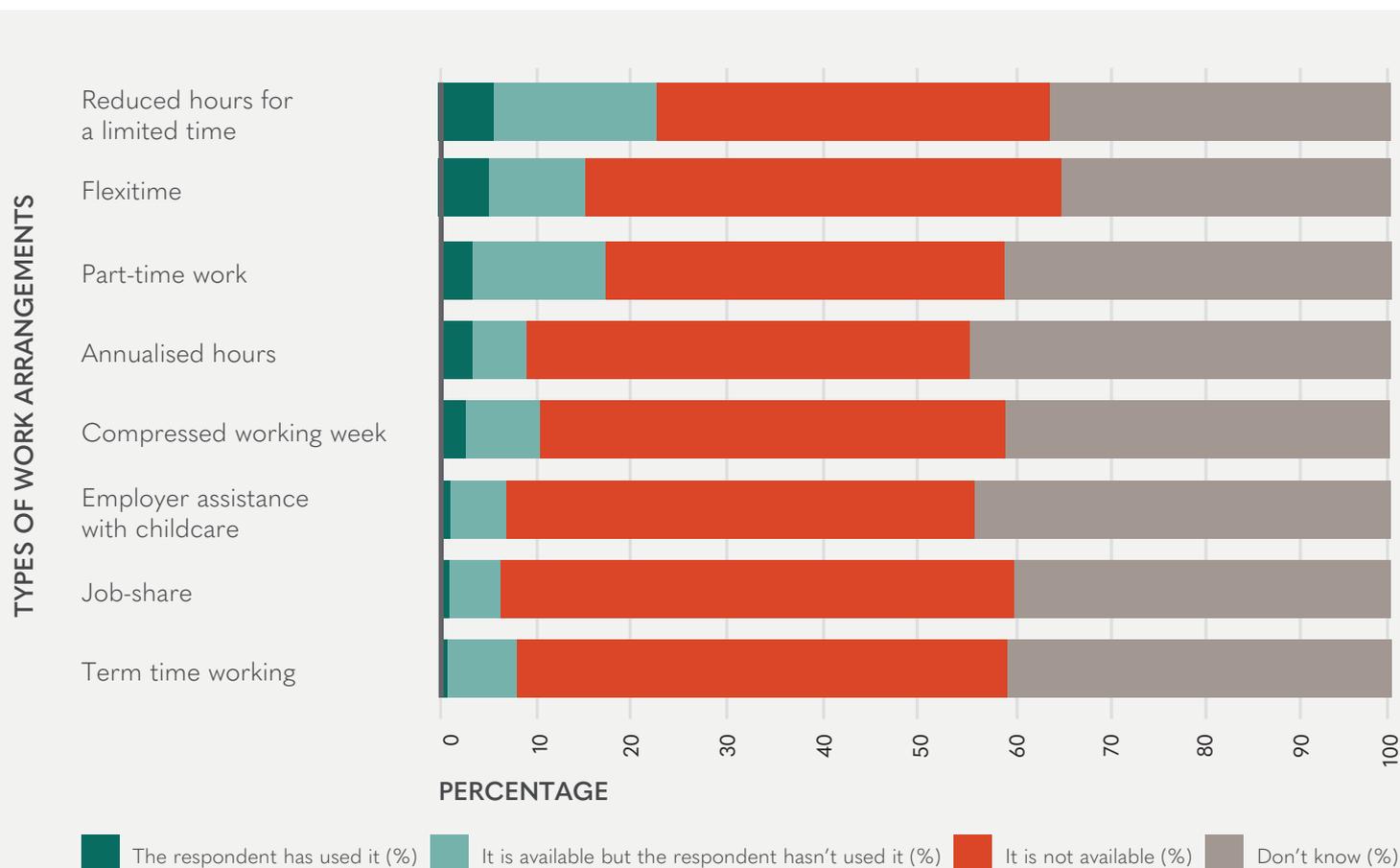
Just 27 current HGV drivers (1.5%) were working in companies that provided all 8 work arrangements, and 101 current HGV drivers (6%) reported working in companies that provided 5 or more of the arrangements.

There is much lower use of the arrangements than reported *availability*. The data shows that 248 current HGV drivers (14%) had used one of the 8 work arrangements provided by their employer. Only 20% of drivers in companies offering part-time working had used this arrangement. This is unsurprising given that, in 2023, just 4.7% of HGV drivers in the UK worked part-time hours^{xiii}.

Our analysis found that female HGV drivers were over-represented amongst drivers who had used part-time working ($p < .0001$; Chi-Square score: 24.16, d.f. =1) and flexitime ($p = 0.03$; Chi-square score: 4.38, d.f.=1). This mirrors the gendered use of alternate work arrangements at the national level across sectors with more women than men doing part-time work (38% to 14%)^{xiv}.

Annualised hours and compressed hours are more commonly offered in white-collared, desk-based occupations. They may be difficult to implement in HGV driving work due to regulations on driver hours. Similarly, seasonal patterns of demand influence the types of contracts and working hours for HGV drivers. Therefore work arrangements need to be considered in the specific context of haulage work.

Figure 3.6. Availability, Awareness and Use of Diverse Work Arrangements by Current HGV Drivers



CHAPTER 3 KEY FINDINGS



Over half (54%) of current HGV driver respondents reported negative impacts on their physical health, and one third (32%) reported negative impacts on their mental health from HGV driving work.



Negative mental health associated with HGV driving work is more likely for those drivers with caring responsibilities and it increases with years of experience.



Reports of a positive impact of HGV driving work on mental health is associated with working part-time, being female and driving a rigid truck.



Drivers working on zero-hour contracts were more likely to report negative impacts of the job on their physical health than workers on permanent contracts.



More than half (54%) of respondents with caring responsibilities stated that they find it difficult to balance care work with their work as an HGV driver.



Over half (51%) of current HGV driver respondents stated that the job has a negative impact on their social lives and friendships.



The provision, awareness and uptake of diverse work arrangements are very low amongst current HGV drivers. Just 14% of respondents had used one of the 8 work arrangements.



Female HGV drivers are over-represented in part-time HGV driving work.

4. DRIVER EXPERIENCES OF DISCRIMINATION AT WORK

As the previous section has shown, the demands of driving work severely impact upon drivers' lives outside of work, limiting their ability to establish and maintain fulfilling and healthy social relations. But what happens at work also matters for the health and wellbeing of workers.

Despite being illegal, workplace discrimination remains prevalent, and can take a variety of different forms. It can include explicit cases of harassment and bullying, but also preferential treatment of some workers over others. For mobile workers, the possibility of discrimination expands to different spaces due to the diversity of sites that the worker visits in the course of a day, and such experiences of discrimination are likely to have a negative impact on driver recruitment and retention.

Little is known about the types of discrimination experienced by HGV drivers. The survey sought to address this by understanding the prevalence, sources and acts of discrimination experienced by respondents.

4.1 EVERYDAY EXPERIENCES OF DISCRIMINATION AT WORK

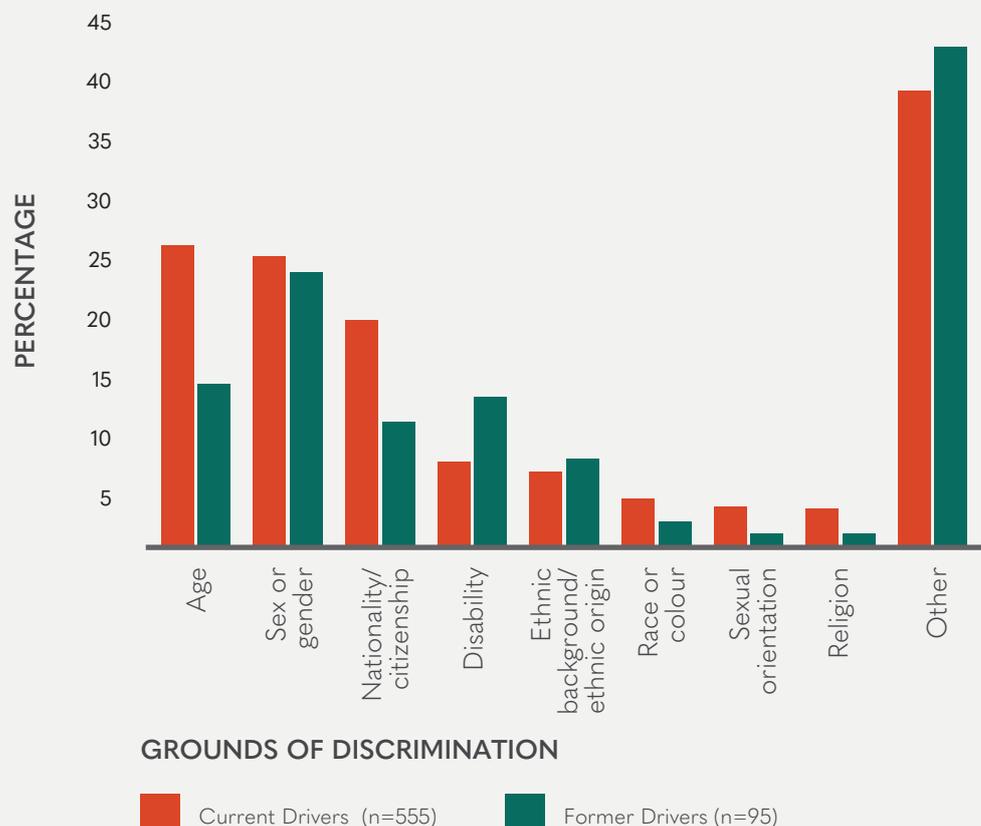
The survey asked respondents whether they had been discriminated at work as an HGV driver, with discrimination described as being 'treated less favourably or unfairly because of who you are or because you have certain characteristics'.

32% of current HGV drivers (n=555) and 42% of former drivers (n=95) had experienced discrimination at work.

Half of current female HGV driver respondents (50%; n=115) had experienced discrimination at work, and 97% of these drivers (n=112) identified 'sex/gender' as the ground of discrimination. In other words, half of female HGV driver respondents had been discriminated against at work *for being female*.

Across the sample, the most cited ground for discrimination for current drivers was 'age' (25%), and for former drivers it was 'sex or gender' (23%; Figure 4.1)⁸.

Figure 4.1 Grounds of Discrimination as Experienced by HGV Drivers



⁸ Respondents could select all that applied. For current HGV drivers, 76.9% selected one ground for discrimination, 17.7% selected two grounds, and 5.4% selected 3 or more. For former HGV drivers, 83.3% selected one ground for discrimination, 13.3% selected 2 grounds, and 3.3% selected 3 grounds.

The response categories included an 'Other' option which allowed respondents to describe additional forms of discrimination. We received 202 free text responses from current drivers and 40 from former HGV drivers.

The main 'other' reason described by respondents was discrimination 'simply for being an HGV driver'. Different versions of this response were given by 74 (37%) current drivers and 18 (45%) former drivers (Box 4.1).

Amongst the free text responses, respondents described specific acts of discrimination (e.g., being denied access to toilets) as well as sources of discrimination (e.g., depot management, general public). In Table 4.1, we show some of the acts and sources of discrimination, with verbatim examples.

From this data, we can see that HGV drivers face discrimination from many different sources, including their own companies, the businesses they deliver to, the general public and service operators. For many drivers, this discrimination is seen to be related to negative perceptions of HGV drivers and the very nature of the job that they do.

BOX 4.1. TRUCKERS' WORDS: DISCRIMINATED FOR 'BEING A DRIVER'

"Just being a HGV driver carries a stigma and we're looked down on by others" (current driver)

"Discriminated against weekly for being a driver" (current driver)

"I believe I was treated poorly from time to time as HGV driving was looked upon as a substandard job" (former driver)

Acts of discrimination	Sources of discrimination	Examples
Denied access to facilities including toilets	Delivery sites	'Trying to use facilities at business properties and being refused often'
Favouritism and unfriendly office dynamics	HGV company/ employer	'Not in the click [sic], management and certain drivers [socialise] together then get treated better'
Unfavourable routes and schedules, and older vehicles given to agency worker and/or temporary contract holders	Employers and other HGV drivers	'Permanent employees usually get easier and shorter runs/ jobs than agency drivers'
Aggression by other road users towards HGV drivers	Driving public and other road users	'General public and companies delivering to don't like drivers' 'Because you drive a big lorry and it's slow, holding people up'

Table 4.1. Table of Examples of Acts and Sources of Discrimination from Free Text Responses

Our regression analysis revealed some clear patterns in experiences of discrimination⁹:

- Female HGV drivers were 2.7 (270%) times more likely to report having experienced discrimination at work compared to male HGV drivers
- Drivers 'With caring responsibilities' were 33% more likely to report having experienced discrimination at work compared to drivers with no caring responsibilities
- Drivers belonging to 'Any other white ethnicity'¹⁰ were 92% more likely to have report having experienced discrimination at work compared to drivers identifying as white 'English, Welsh, Scottish, Northern Irish or British'
- Drivers identifying as bisexual were 2.2 (220%) times more likely to report having experienced discrimination at work compared to drivers identifying as heterosexual

4.2. A GENDER PAY GAP IN HGV DRIVING WORK?

While some forms of discrimination are experienced by individual HGV drivers in their everyday lives, other forms of discrimination or unjust treatment operate at a structural level, affecting groups of HGV drivers with particular characteristics.

In order to assess whether drivers' work and personal characteristics had an association with their pay, we conducted a regression analysis on the survey data relating to respondents' annual income reported in £5,000 increments. To undertake inferential analysis, we split these data into two groups: those earning up to and including £30,000 per annum and those earning over £30,000. We used £30,000 as it is the median UK HGV

driver salary based on ONS hourly pay rates for 2023. We then ran the regression analysis to find the likelihood of drivers with different characteristics earning more or less than the median salary.

As expected, work related characteristics, including the number of hours worked (e.g., part-time) and the class of trucks driven (e.g., rigid), impacted upon drivers' salaries. However, our analysis also revealed that female HGV driver respondents in our sample were 62% less likely than male HGV drivers to earn more than the median salary of £30,000 per annum (pa) for the same job.¹¹

The 'same job' is important here, as factors including contract type, employment type, years of experience, number of nights away from home, class of HGV driven, and hours worked (part-time or full-time) all affect the salaries that workers receive. Our multiple logistic regression model accounted for all of these variables and still found that female drivers in our sample were significantly ($p = <.001$) less likely to earn above £30,000 pa compared to male respondents.

This finding suggests, contrary to some reports^{xv xvi}, that there could be a gender pay gap in HGV driving work, whereby female HGV drivers earn less than their male counterparts for the same job.

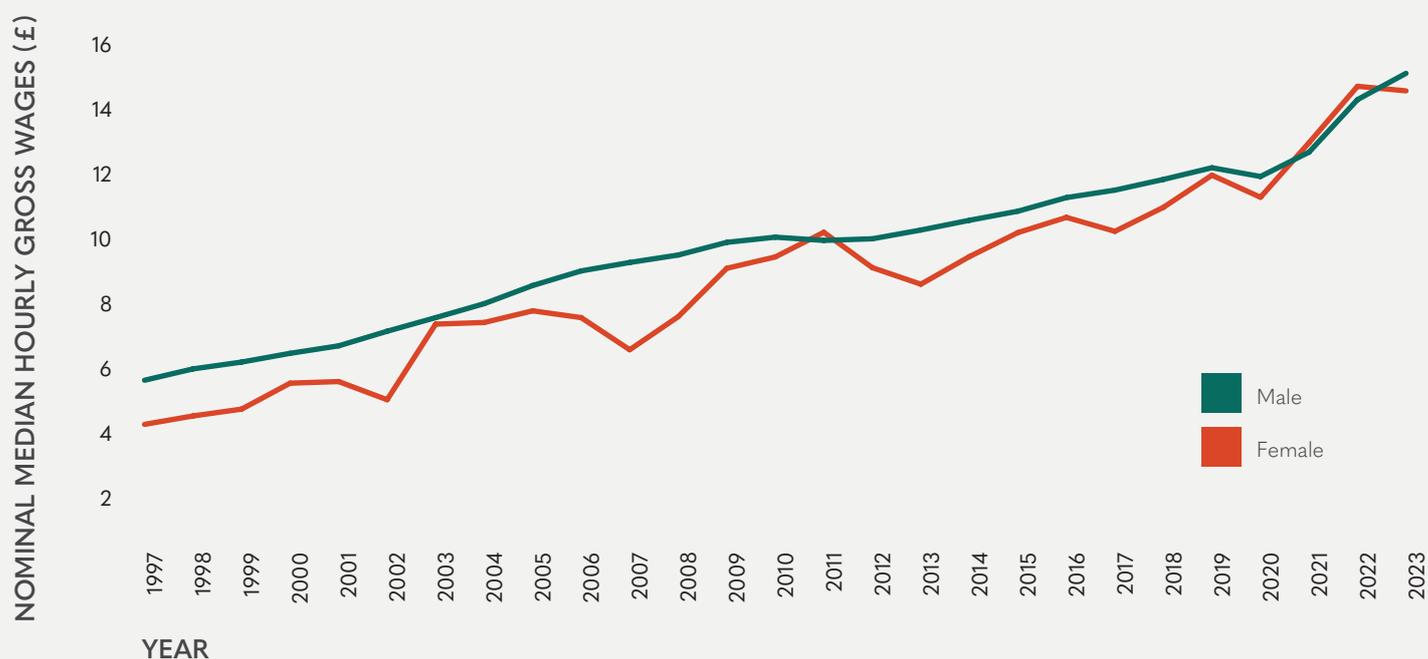
ONS data on median hourly pay for HGV drivers from 1997 to 2023 also indicates full-time female drivers receive rates of pay that are lower than full-time male drivers. As Figure 4.2 shows, the pay rates received by male and female HGV driver have narrowed on three occasions; in the early 2000s, the early 2010s and again in 2019. Since 2021, there has been more sustained parity. However, the year 2022-23 has seen a slight decline in hourly pay rates for female drivers.

⁹ Result of the multiple logistic regression model. Variables highlighted in the discussion are predictor variables that showed high levels of significance at $p < 0.05$. See Appendix D for the detailed results of the multivariable regression model and its discussion.

¹⁰ This category is from the UK census, and serves as a sub-category of 'white'. The other sub-categories are: 'English, Welsh, Scottish, Northern Irish or British', Irish, Gypsy or Irish Traveller, and Roma.

¹¹ See Appendix D for the results of the multivariable binary logistic regression and the discussion relating to income differences and the likelihood of a gender pay gap in HGV driving work.

Figure 4.2. Nominal Median Hourly Gross Wages of Full-Time HGV Drivers by Gender. ONS Data.



CHAPTER 4 KEY FINDINGS



Discrimination is prevalent in HGV driving work.



32% of current driver respondents (50% of current female drivers), and 42% of former driver respondents had experienced discrimination at work.



Discrimination was more common on the basis of certain characteristics and identities related to age, gender, sexuality, ethnicity and on the basis of having caring responsibilities.



Discrimination simply for 'being an HGV driver' was widely reported. This type of discrimination occurred through implicit and explicit acts in different sites, including roads/ motorways, service stations, depots and warehouses.



Female HGV drivers were more likely than male drivers to report earning less than the median wage of £30,000 pa.

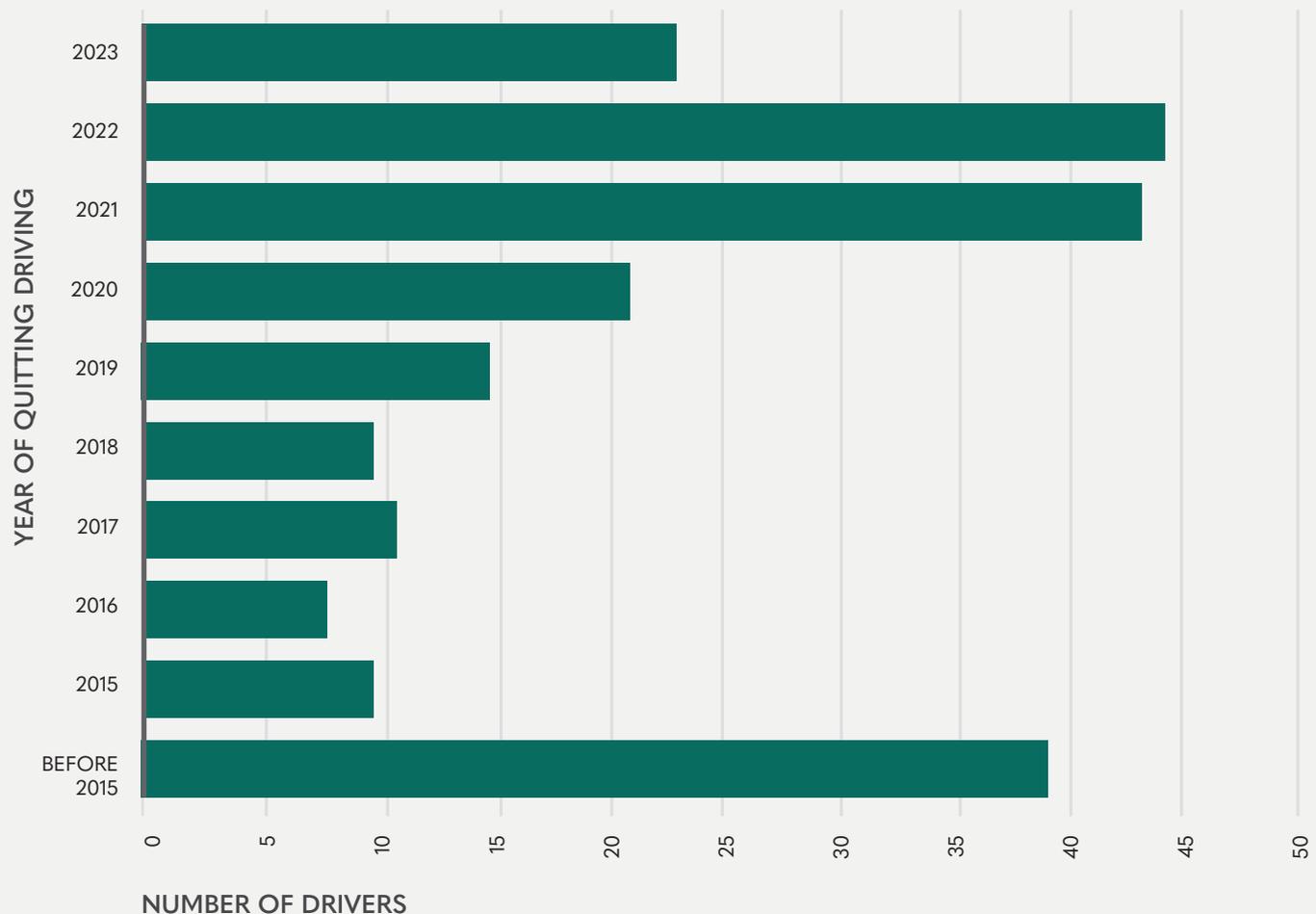
5. DRIVER ATTRITION AND RETENTION

While attracting new drivers into the sector is important, so too is retaining the existing workforce. This requires a better understanding of drivers' everyday experiences as well as other events and actions which might be leading them away from HGV driving work. The Trucking Lives survey attracted responses from 224 former HGV drivers and is therefore able to combine reported reasons for leaving the job from former drivers with the stated future intentions of current HGV drivers.

5.1 WHEN AND WHY DID FORMER DRIVERS QUIT THEIR JOBS?

A majority of former driver respondents had quit HGV driving in the 8 years prior to completing the survey, with 59% of respondents quitting between 2020 and 2023.¹² This is consistent with ONS data for this period^{xvii} with exits explained by the COVID-19 pandemic, Brexit and changes to tax regulations. In Figure 5.1, the category 'before 2015' covers the period from 1982 to 2014.

Figure 5.1 Year When Former Drivers Quit HGV Driving



¹² The survey closed in the first week of May 2023.

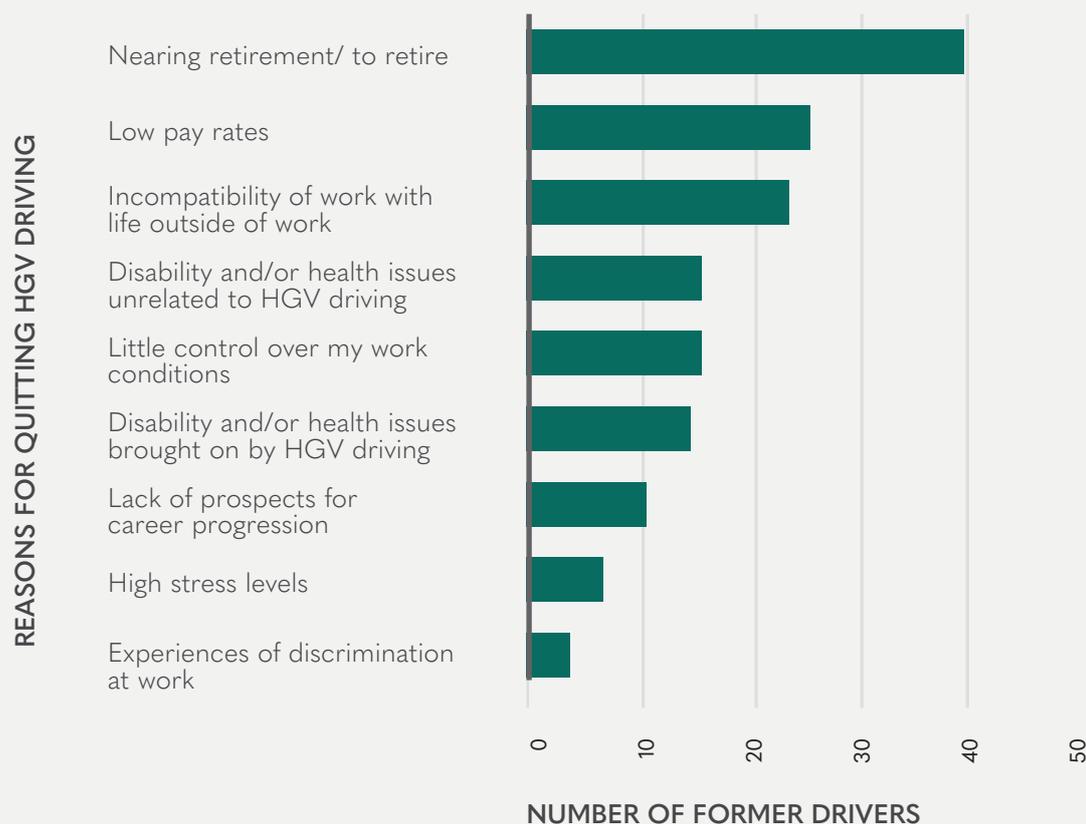
'Nearing retirement' was the reason selected by most former drivers (18%) for stopping HGV driving work, followed by low pay rates (12%) and incompatibility of work with life outside of work (11%).

Since 'nearing retirement' correlates with age, we wanted to better understand the reasons for younger drivers – those before retirement age – quitting HGV driving.

In Figure 5.3 we present an analysis of the reasons for quitting disaggregated by age when they quit and some interesting patterns emerge:

- 'Incompatibility with life outside of work' and 'low pay rates' appear to have motivated drivers to quit across most age groups, indicating that dissatisfaction over these factors affects the sector at large.
- 'Lack of career progression' appears most strongly for former drivers who quit the job in their 40s.
- 'Disability/Health issues' (both related and unrelated to HGV driving) was more commonly selected by drivers who quit in their 40s and 50s.

Figure 5.2 Reasons for Quitting HGV Driving



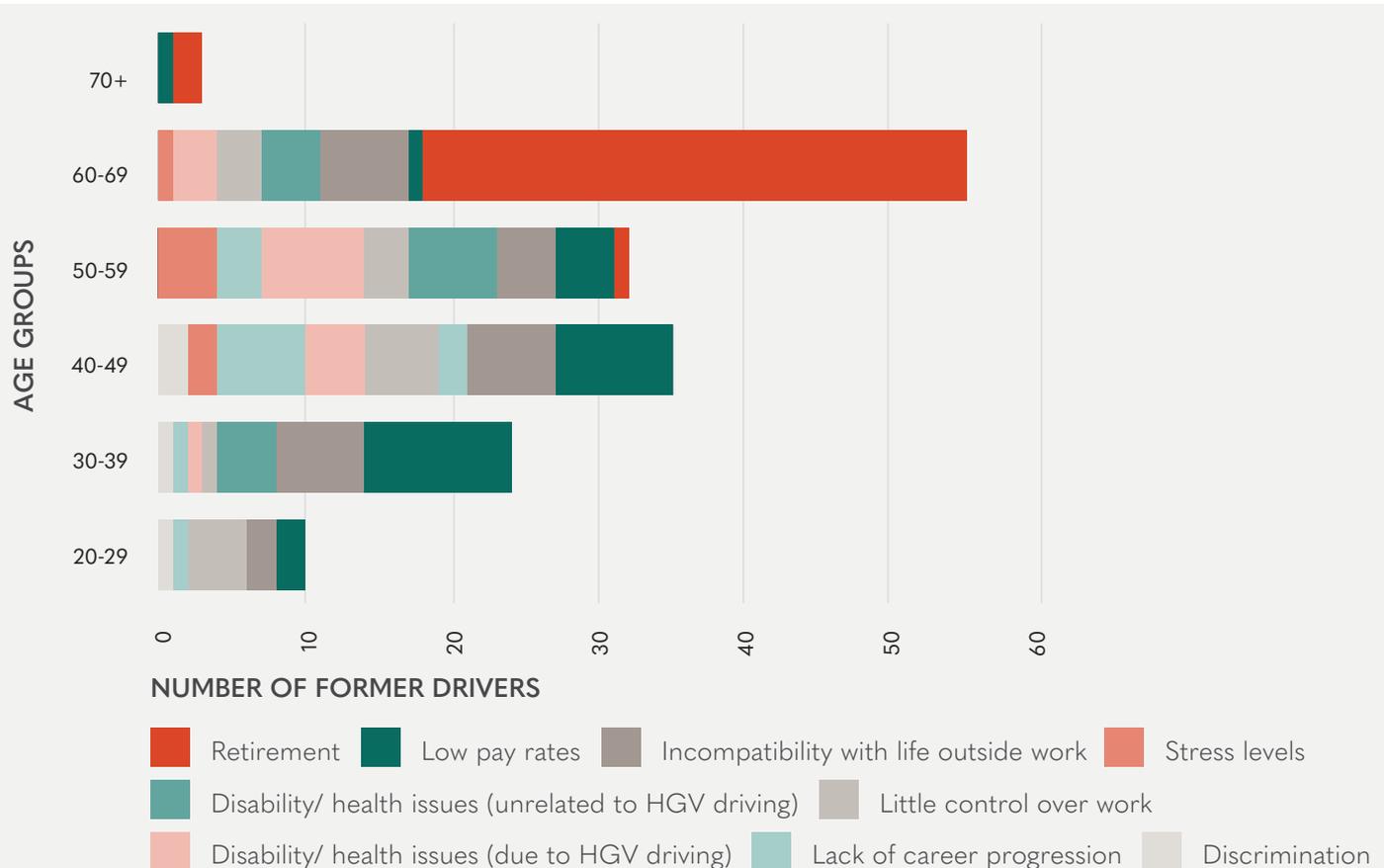
Of our former HGV driver respondents, 65 provided free text explanations for their reasons for quitting. 27 of these responses described a work promotion either within or outside of road haulage, with a majority of these drivers in their 30s and 40s at the time. Two respondents had moved overseas to continue HGV driving work.

Of the remaining responses, more than half described poor working conditions and adverse physical and mental health impacts that led them to quit HGV driving. This included themes relating to:

- Low hourly pay rates
- Long hours of work
- Workplace harassment and discrimination
- Poor quality and expensive roadside facilities
- A lack of work-life balance

For women in the 30-39 age group, pregnancy (Box 5.1), caring responsibilities and harassment were often repeated reasons for quitting HGV driving work.

Figure 5.3 Reasons for Quitting HGV Driving (by Age)



BOX 5.1. TRUCKERS' WORDS: REASONS FOR QUITTING

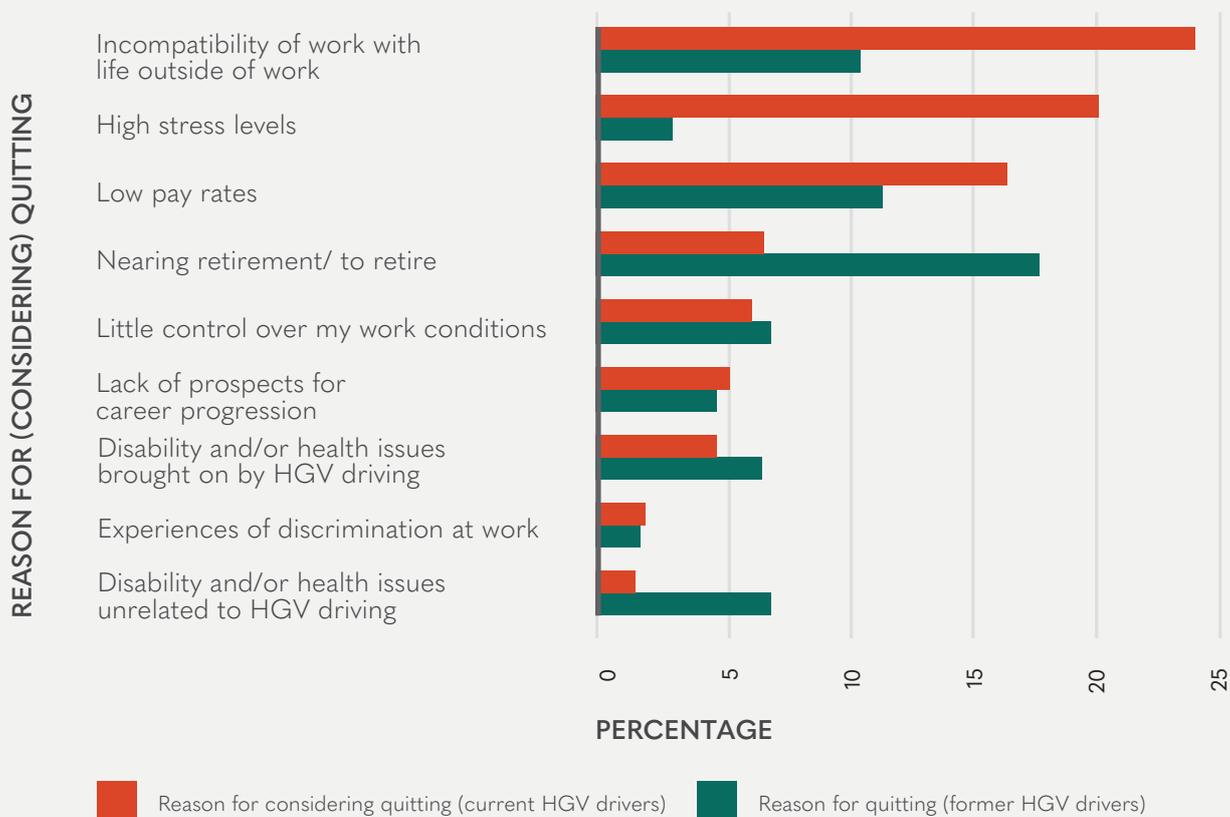
A female former driver quit because of: 'Pregnancy and the fear of being stuck somewhere due to running out of taco [sic] time scared me after considering going back after baby came'.

Former drivers across age groups also raised the financial cost and time burdens of renewing their Driver Certificate of Professional Competence (CPC) as a factor that contributed to their decision to quit HGV driving.

5.2.WHY ARE CURRENT DRIVERS CONSIDERING QUITTING HGV DRIVING?

We asked current HGV drivers, 'In the past 12 months, have you considered quitting HGV driving?'. We found that over half (54%) of respondents had considered quitting their job in the past 12 months. The respondents who had considered quitting were then asked why. These findings are presented in Figure 5.4.

Figure 5.4. Reasons for (Considering) Quitting HGV Driving





BOX 5.2. RECRUITMENT, RETENTION AND PAY RATES

Pay rates impact upon the recruitment and retention of HGV drivers by attracting workers to the job but also offering possibilities for progression and pay rises to retain workers. But drivers can earn vastly different pay rates, based on a number of job characteristics. Our regression results revealed that:

- As company size increased, there was a consistent increase in the likelihood of drivers earning more than £30,000p.a.
- With every one night away from home, drivers had a 12% higher likelihood of earning more than £30,000p.a.
- Unsurprisingly, drivers working part-time hours were 96% less likely to earn more than £30,000p.a. compared to full-time drivers
- Rigid vehicle drivers were 58% less likely to earn over £30,000p.a. compared to articulated truck drivers

For current drivers who had considered quitting in the 12 months prior to the survey, 'Incompatibility of work with life outside of work' was the most important reason for considering quitting, selected by nearly one quarter of respondents. This was followed by high stress levels (20%) and low pay rates (17%).

The pay rates received by HGV drivers depend on a number of factors and can vary based on the types of driving work completed. Our research found a number of characteristics that affect the likelihood of earning above or below the median annual salary of £30,000p.a. (Box 5.2), which may support driver retention or be seen as a pathway to promotion.

We conducted an additional analysis to understand the reasons why drivers under the age of 30 had considered quitting. We divided the group of current drivers who had considered quitting (n= 946) into those under 30 years (n=94) and those aged 30 and over (n=852).

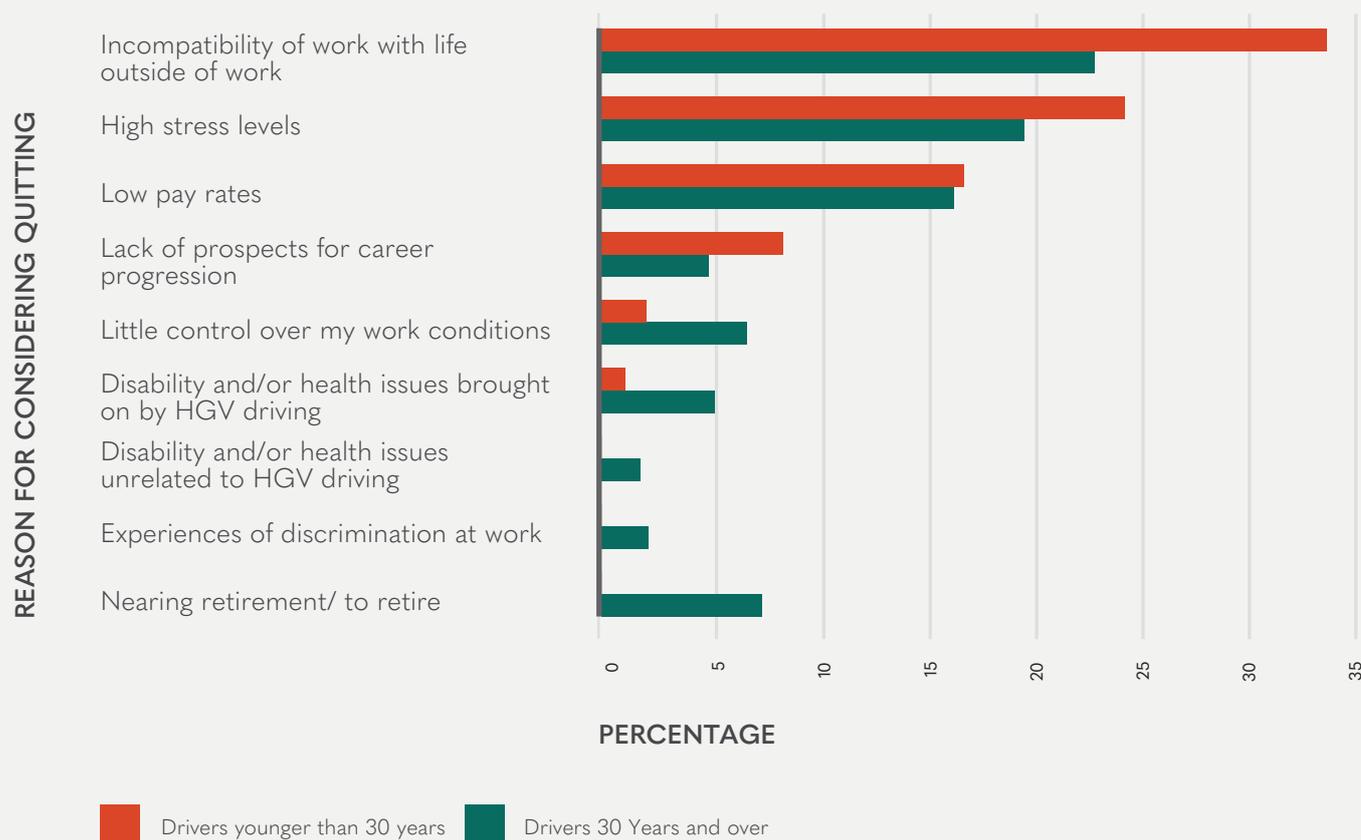
'Work-life incompatibility' emerged as the most highly cited reason amongst drivers under the age of 30 to have considered quitting. 34% of drivers under 30 years selected this response compared to 23% of those aged 30 and over.

We also received 109 free text responses explaining 'other' reasons why current drivers had considered quitting. These included:

- Ill-treatment ('poor way spoken to at own depot and elsewhere. Treated like a lesser person, as if beneath them. Most staff full of disdain')

- Increasing regulation and monitoring of HGV driving work ('More and more regulations, rules, government interference')
- Negative impacts on health and wellbeing ('Mix of stress, effect on mental and physical health, and work making social life extremely hard to have')
- Low availability and poor quality of facilities ('Lack of decent washing/eating facilities at truck stops')
- Difficulty accessing childcare ('childcare arrangements, starting at 4am and no childcare facilities open')

Figure 5.5 Reasons for Considering Quitting HGV Driving (by Age)



Our regression analysis shows a number of characteristics which affect the likelihood of an HGV driver considering quitting (Figure 5.6). Drivers with caring responsibilities were more likely than those without caring responsibilities to have considered quitting. Drivers working part-time were less likely to

have considered quitting compared to drivers working full-time.¹³ Despite the gender pay gap identified in the previous section, our analysis shows that female HGV drivers were less likely than male HGV drivers to have considered quitting.

¹³ For the full results of the multivariable logistic regression and discussion of current drivers' consideration to quit HGV driving, see Appendix D.

Figure 5.6. Characteristics of HGV Drivers More Likely to Quit

Drivers with caring responsibilities were 52% more likely to have considered quitting HGV driving than drivers without caring responsibilities

Every additional year of experience as a HGV driver increases the likelihood of them quitting by 3%

Female HGV drivers were 30% less likely to have considered quitting compared to male drivers

Drivers working part-time were 40% less likely to have considered quitting HGV driving compared to drivers working full-time

CHAPTER 5 KEY FINDINGS



Retirement, low pay rates and incompatibility with life outside of work were motivations to quit HGV driving for 40% of former drivers.



Being treated disrespectfully, having poor working conditions and dissatisfaction with roadside and parking facilities contribute to driver attrition.



Over half (54%) of current drivers had considered quitting their job in the last year, largely due to work-life incompatibility, stress and low pay rates.



Work-life incompatibility is a particularly important reason for drivers below the age of 30 to have considered quitting HGV driving.



Having caring responsibilities increases the likelihood (by 52%) of drivers considering quitting. Whereas working part-time lowers the likelihood of considering quitting by 40%.



The likelihood of quitting HGV driving increases with every additional year of experience gained as a driver.

6. HGV DRIVER JOB SATISFACTION

Job satisfaction can be understood as having a 'positive emotional state' in relation to one's job or experiences of the job^{xviii} and it is important for employers and employees alike. Low levels of job satisfaction correlate with poor worker retention, and high rates of workers moving between employers. Job dissatisfaction is also associated with increased prevalence of mental health conditions including depression and anxiety and physical health conditions.

For this reason, it is important to understand levels of job satisfaction amongst HGV drivers in the UK. However, researching job satisfaction can be a difficult task.

For instance, it is well documented that women report higher levels of job satisfaction than men across sectors and job types^{xix}. Moreover, it is important to recognise the limits to self-reported scores on job satisfaction, inasmuch as job satisfaction does not equate to job quality. Thus careful interpretation of job satisfaction scale findings is required^{xx}.

Job satisfaction can be measured in a variety of ways, but a common approach is through either a single measure of reported satisfaction, or through a measure that separates out different dimensions of work. We used the latter approach.

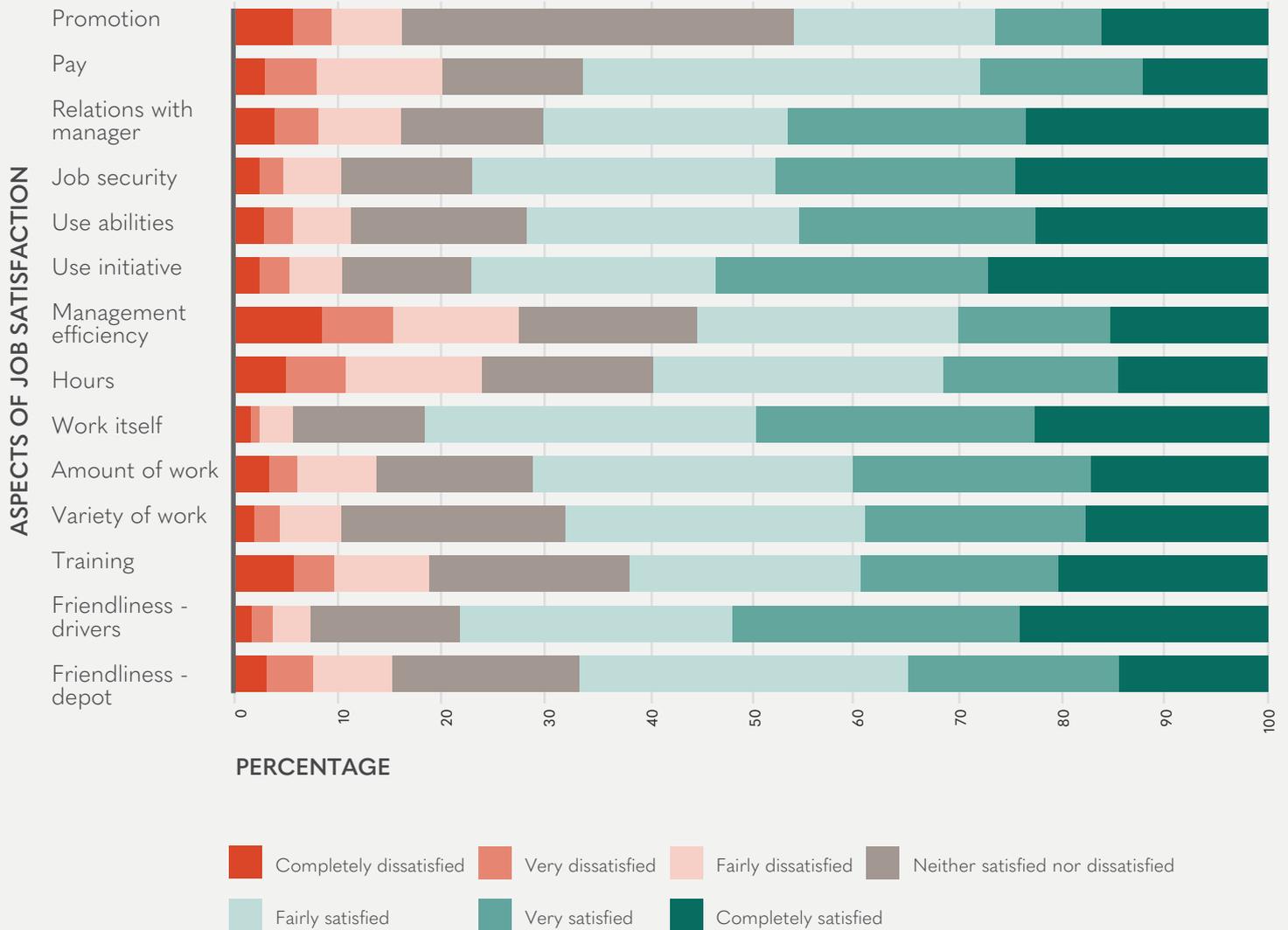
We adopted a job satisfaction scale to examine HGV drivers' satisfaction with 14 dimensions¹⁴ of their work:

- Your promotion prospects ('promotion')
- Your pay ('pay')
- Relations with your supervisor or manager ('relations with manager')
- Your job security ('job security')
- The opportunity to use your abilities ('use abilities')
- Being able to use your own initiative ('use initiative')
- The ability and efficiency of the management ('management efficiency')
- The hours you work ('hours')
- The work itself ('work itself')
- The amount of work ('amount of work')
- The variety in the work ('variety in work')
- The training provided ('training')
- The friendliness of the people you work with (other HGV drivers) ('friendliness of other drivers')
- The friendliness of the people you work with (people working at depots) ('friendliness of people in depots')

Respondents were asked to answer this question using a seven-point Likert scale from 'completely satisfied' to 'completely dissatisfied', with a neutral option included. Figure 6.1 represents the satisfaction levels of current HGV drivers, converted from the Likert scale 1-7 to a 0 to 100 score (See Appendix D), for each of the 14 aspects relating to their work.

¹⁴ See 'Skills and Employment Survey 2017 – Technical Briefing', p.98 in <https://www.cardiff.ac.uk/research/explore/find-a-project/view/626669-skills-and-employment-survey-2017>

Figure 6.1 Job Satisfaction Scores of Current HGV Drivers



However, as noted above, there are different ways that job satisfaction is interpreted, and it can be affected by personal and work characteristics. Given the need to attract a more diverse HGV driver workforce, we sought to understand trends in job satisfaction by three critical characteristics¹⁴:

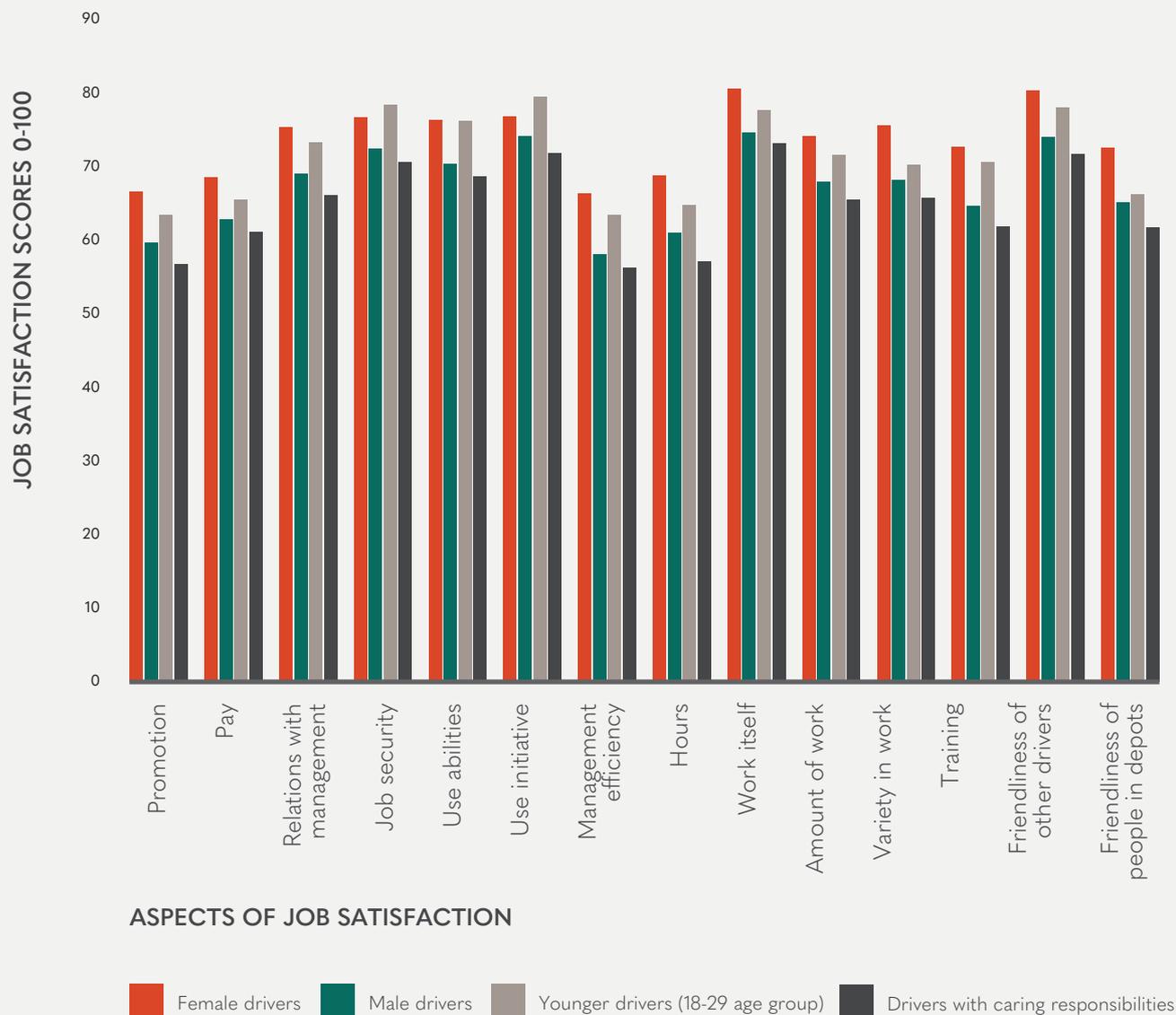
- Gender
- Age
- Having caring responsibilities

Running our analysis for these groups helped to disaggregate the findings presented in Figure 6.1, and to identify trends within and across these groups of HGV drivers. Figure 6.2 shows trends in job satisfaction, in particular:

- Female HGV drivers and younger HGV drivers (below the age of 30) reported the highest levels of job satisfaction across all 14 measures
- Drivers with caring responsibilities reported the lowest levels of satisfaction across all 14 measures

¹⁴ The final sample composition did not allow us to also interrogate the experiences of ethnic minority drivers.

Figure 6.2 Job Satisfaction Scores Across Socio-Demographic Groups of Current HGV Drivers



Interestingly, the pattern of responses presented in Figure 6.2 is similar for dimensions of job satisfaction across these four respondent groups (female, male, younger and with caring responsibilities). The data suggests higher levels of satisfaction associated with:

- Having job security
- Being able to use initiative
- The work itself

- The friendliness of other drivers

But lower levels of job satisfaction associated with:

- Promotion prospects
- The ability and efficiency of the management
- The hours worked
- The training provided

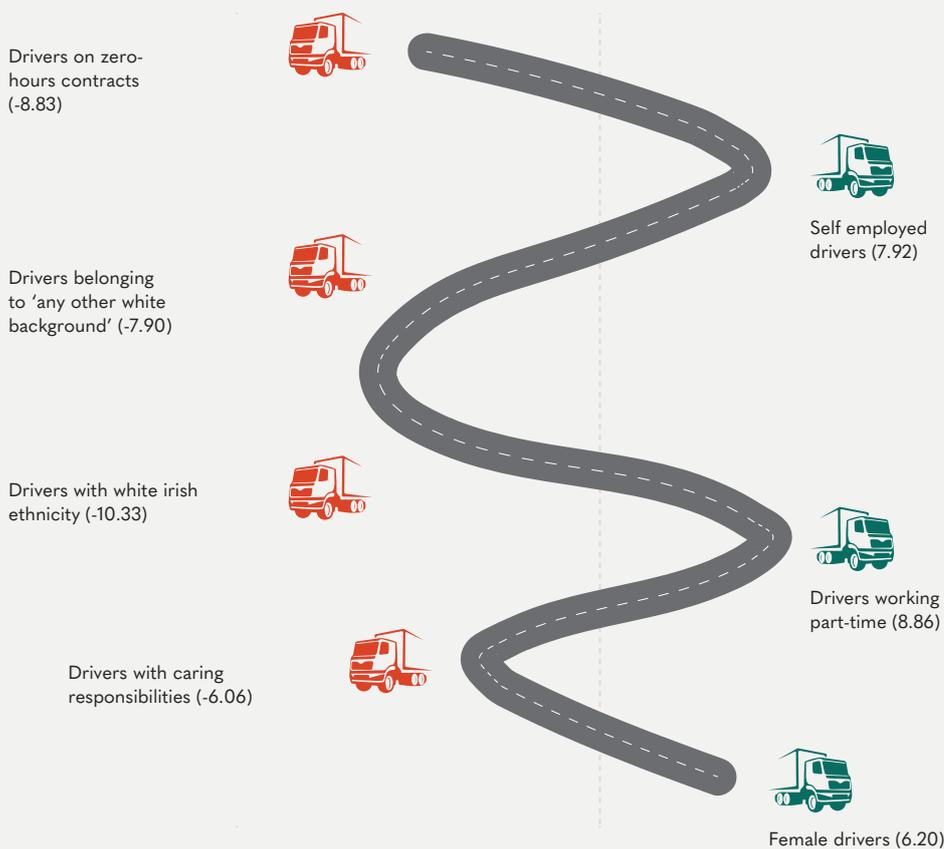
The items associated with higher levels of satisfaction - job security, use initiative, the work itself and the friendliness of other drivers - are more closely associated with the professional and cultural identity of HGV driving work, including the lifelong skills that are acquired; the sense of autonomy or freedom that is strongly associated with the job; the professional identity of socially valuable work, and the camaraderie that HGV drivers find and share with one another.

At the same time, the four aspects that drivers were least satisfied with – promotion prospects, management

efficiency, hours and training - relate to the everyday conditions of work that are determined by employers and the structure of the haulage sector. These are aspects that drivers might have less control over.

To develop these findings further, we wanted to understand the personal and work characteristics that are associated with the items with the lowest reported satisfaction rates. To do this we ran regression analyses on responses to: (1) the hours worked, (2) the training provided, and (3) the ability and efficiency of management. See Appendix D for the full results.

Figure 6.3 Factors Affecting Driver Satisfaction with the 'Hours Worked'



 Factors that negatively affect satisfaction levels relating to 'Hours Worked' as an HGV driver

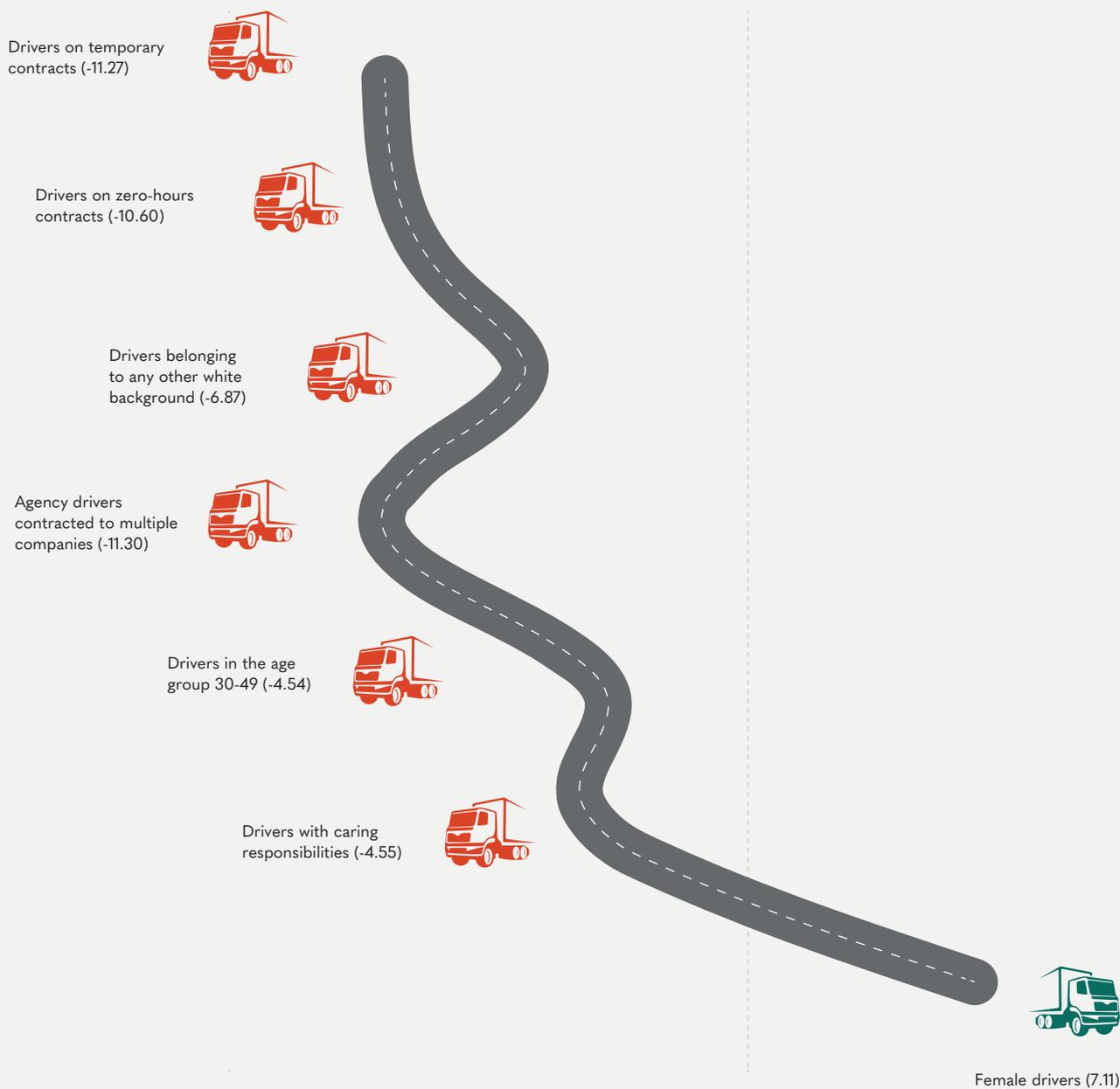
 Factors that positively affect satisfaction levels relating to 'Hours Worked' as an HGV driver

Values in brackets are standardised regression co-efficients of predictor variables that showed high levels of significance at $p < 0.05$.

The analysis shows that female HGV drivers, drivers working part-time and self-employed drivers were more likely to report higher levels of satisfaction with the hours that they work as HGV drivers (Figure 6.3). However,

drivers with caring responsibilities, Irish drivers, drivers identifying as belonging to 'any other white background' and drivers on zero-hour contracts were less likely to be satisfied with the hours they work.

Figure 6.4 Factors Affecting Driver Satisfaction with the 'Training Provided'



Factors that negatively affect satisfaction levels relating to 'Training Provided' as an HGV driver



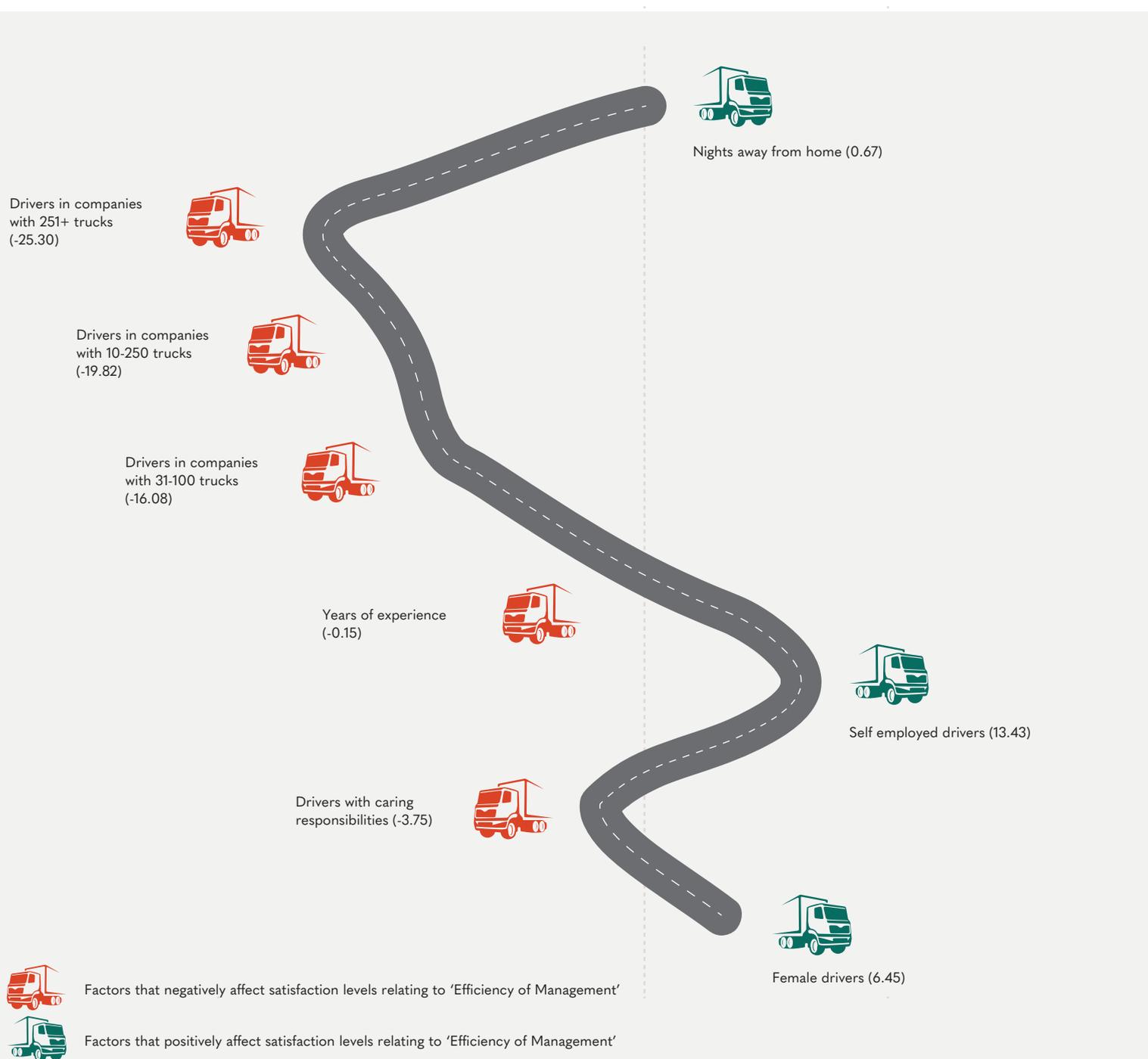
Factors that positively affect satisfaction levels relating to 'Training Provided' as an HGV driver

Values in brackets are standardised regression co-efficients of predictor variables that showed high levels of significance at $p < 0.05$.

Our analysis shows that female drivers were more likely to report higher satisfaction with the 'training provided' job satisfaction measure (Figure 6.4). However drivers with caring responsibilities, drivers aged 30-49, agency drivers contracted to multiple hauliers, drivers

on temporary contracts and zero-hour contracts, and drivers belonging to 'Any other white background' were significantly less satisfied with respect to training opportunities provided to them.

Figure 6.5 Factors Affecting Driver Satisfaction with the 'Efficiency of Management'



Values in brackets are standardised regression co-efficients of predictor variables that showed high levels of significance at $p < 0.05$.

Our analysis shows that female HGV drivers and self-employed HGV drivers were more likely to report higher levels of satisfaction with the ability and efficiency of management (Figure 6.5). Every one night away from home on HGV driving work had a positive impact on levels of satisfaction with management efficiency. However, drivers with caring responsibilities were likely

to be less satisfied with the efficiency of management. We also found that as company size increases, drivers tended to have rising levels of dissatisfaction. The model also shows that for every additional year of experience as an HGV driver dissatisfaction with management efficiency increased.

CHAPTER 6 KEY FINDINGS



Satisfaction levels differed by a variety of personal characteristics, but there were consistent patterns across the 14 items of job satisfaction.



Female HGV drivers reported higher levels of job satisfaction than male drivers.



Drivers with caring responsibilities reported the lowest levels of job satisfaction.



Drivers reported higher levels of satisfaction for items that related to the professional identity and culture of the job (job security, ability to use initiative, the work itself and the friendliness of other drivers).



Drivers indicated lower levels of satisfaction for aspects that reflect company and management responsibilities (promotion, management efficiency, hours worked and training).



Drivers on zero-hour contracts were more likely to report lower satisfaction with the hours they work, whereas drivers working part-time were more likely to report higher levels of satisfaction with their hours of work.



Drivers on temporary contracts were more likely to be dissatisfied with the training provided; female HGV drivers were more likely to report higher levels of satisfaction.



The data suggests that HGV drivers' satisfaction with the efficiency of management decreases as company size increases.

7. HGV DRIVER SUGGESTIONS FOR ACTIONS TO IMPROVE THEIR WORKING LIVES

In the previous sections we have shown the ways that the 1,980 respondents of the Trucking Lives survey experience (or experienced) HGV driving work in the UK. Our results have indicated how a number of work and personal characteristics impact these experiences.

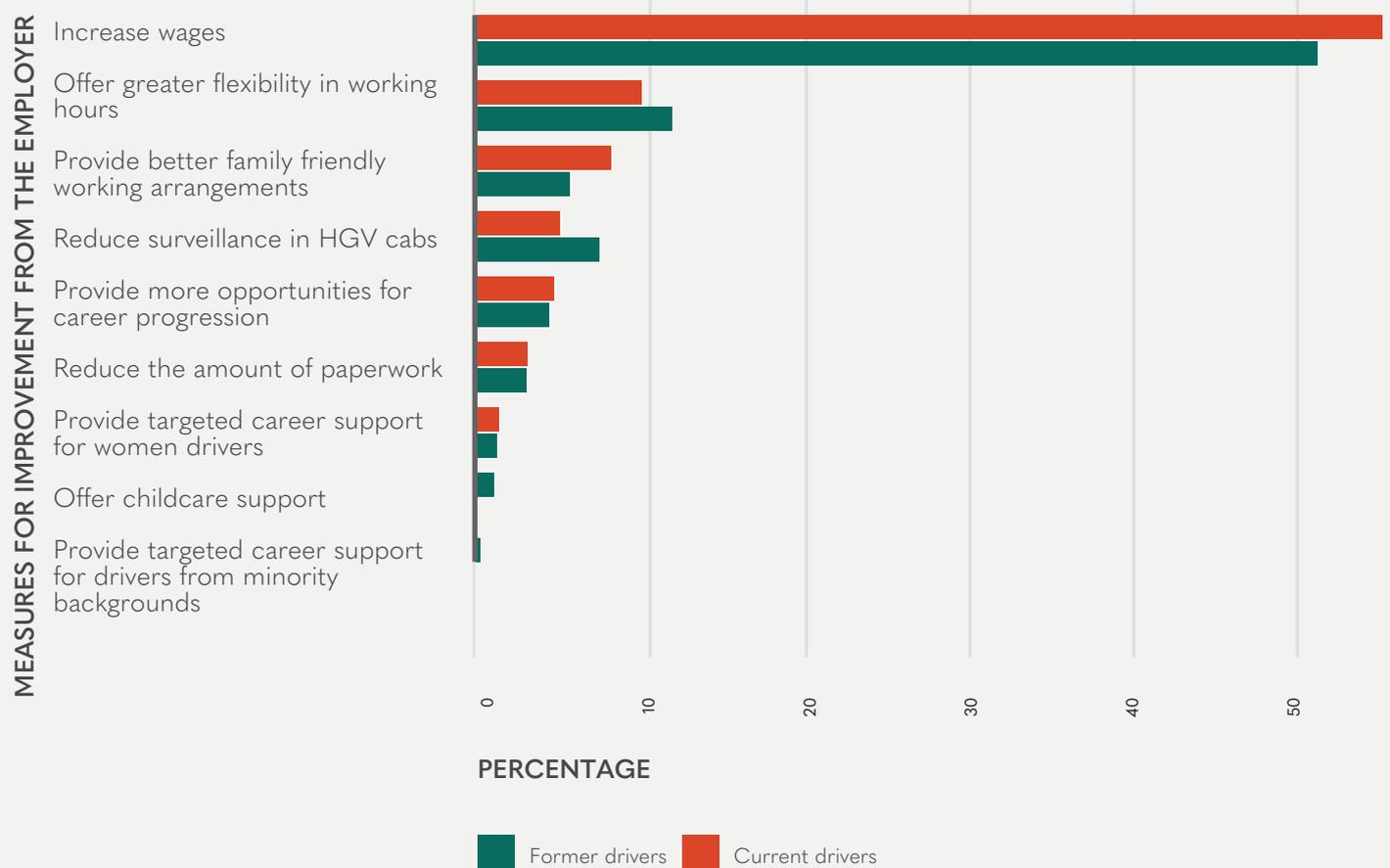
The findings point to the need for actions to improve HGV drivers' working lives. The government and employers are two important groups who can make these changes. We asked former and current drivers to select one measure that their employer and the UK government

could each implement to attract new drivers into the sector and retain those already working in the sector.

7.1 EMPLOYER ACTIONS NEEDED

A majority of both current (56%) and former (52%) HGV drivers identified 'increase wages' as the priority activity for employers to improve drivers' working lives (Figure 7.1). This was followed by offering greater flexibility in working hours (Box 7.1).

Figure 7.1 Actions to be Taken by Employers To Improve the Work-Lives of HGV Drivers



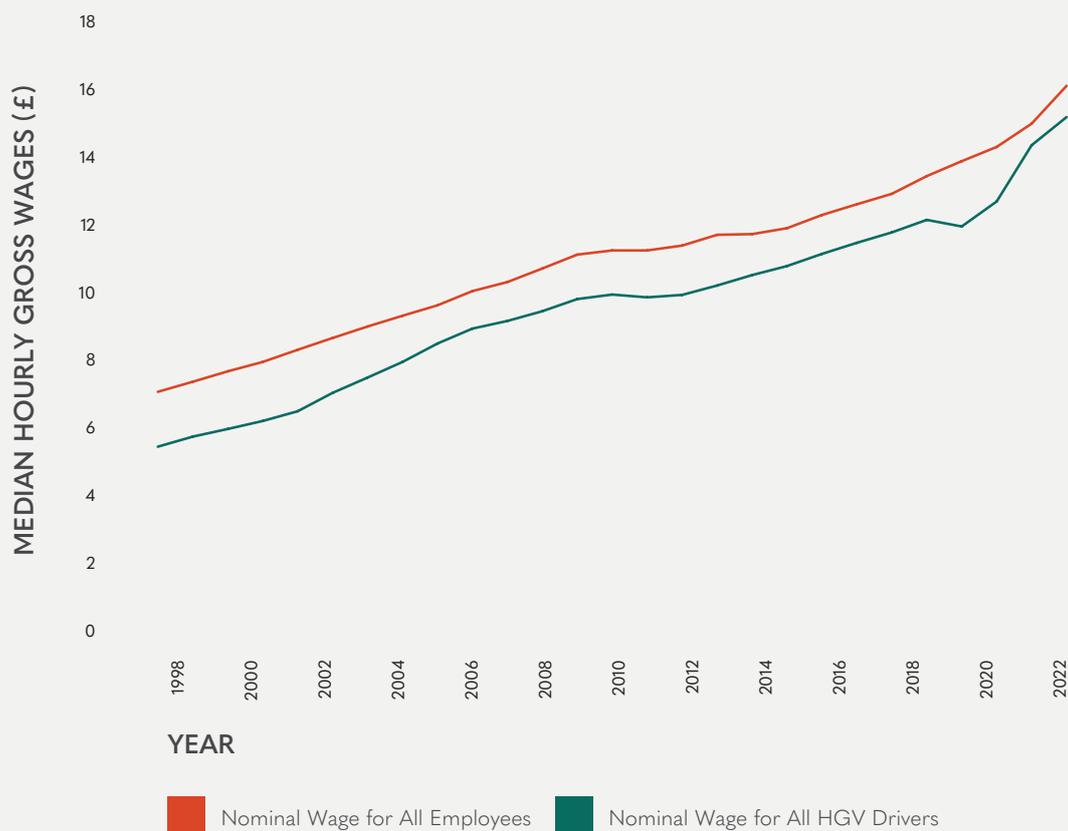
ONS data on hourly pay (Figure 7.2) shows how nominal median hourly wage rates for HGV drivers have historically been lower than those of the average employee in the UK. It is only since 2020 that the gap has narrowed.

Driver responses on pay rates in the sector could reflect the long and uncertain working hours that can be expected of them, with no industry standard on mandatory overtime pay for work over 8 hours. Driver responses also make clear that wages do not adequately reflect or value the many issues associated with HGV driving work, including: antisocial hours of work, isolation, poor work-life balance, adverse impacts on mental and physical health, and the financial costs involved in renewing their licenses every 5 years.

BOX 7.1. TOP 3 ACTIONS FOR EMPLOYERS

- Increase wages
- Offer greater flexibility in working hours
- Provide better family friendly working arrangements (current drivers) and reduce surveillance in HGV cab (former drivers)

Figure 7.2 Nominal Wage Rates for All Employees and All HGV Drivers



Many respondents found it difficult to select just one option, and used the 'Other' option to write 'all of the above'. This suggests that for some HGV drivers, there are many actions which are required simultaneously to improve their working lives.

An analysis of the free text answers provided under the 'Other' option revealed a number of important recurring themes, presented in Table 7.1.

Table 7.1. Truckers' Words: Employer Actions Needed

ACTION	TRUCKERS' WORDS
Decrease working hours	<ul style="list-style-type: none"> • 'Reduction in average working hours. 12-13 hour shifts are normal, and very impactful on work/life balance' • 'Low hourly rate for a skilled job requiring re-qualification every 5 years, the only way to earn a good wage is to work 70+ hours a week'
Reduce normalised culture of over-work	<ul style="list-style-type: none"> • 'Stop pushing drivers to work long hours. I only did 3 shifts towards the end and never did my contracted hours of 27 hours a week. It was between 36 / 40 every week and I did not want to do this'
Improve the vehicle fleet	<ul style="list-style-type: none"> • 'Better packed wagons with less defects' • 'Better spec in trucks' • 'Better cab facilities for tramping'
Treat drivers with respect	<ul style="list-style-type: none"> • 'Show more respect and empathy to their employees and treat us as professionals' • 'Fairer scheduling of work'
Reduce harassment	<ul style="list-style-type: none"> • 'Take note of our treatment of female staff by bullies in the workplace' • 'Take action against sexual harasser'

7.2 UK GOVERNMENT ACTIONS NEEDED

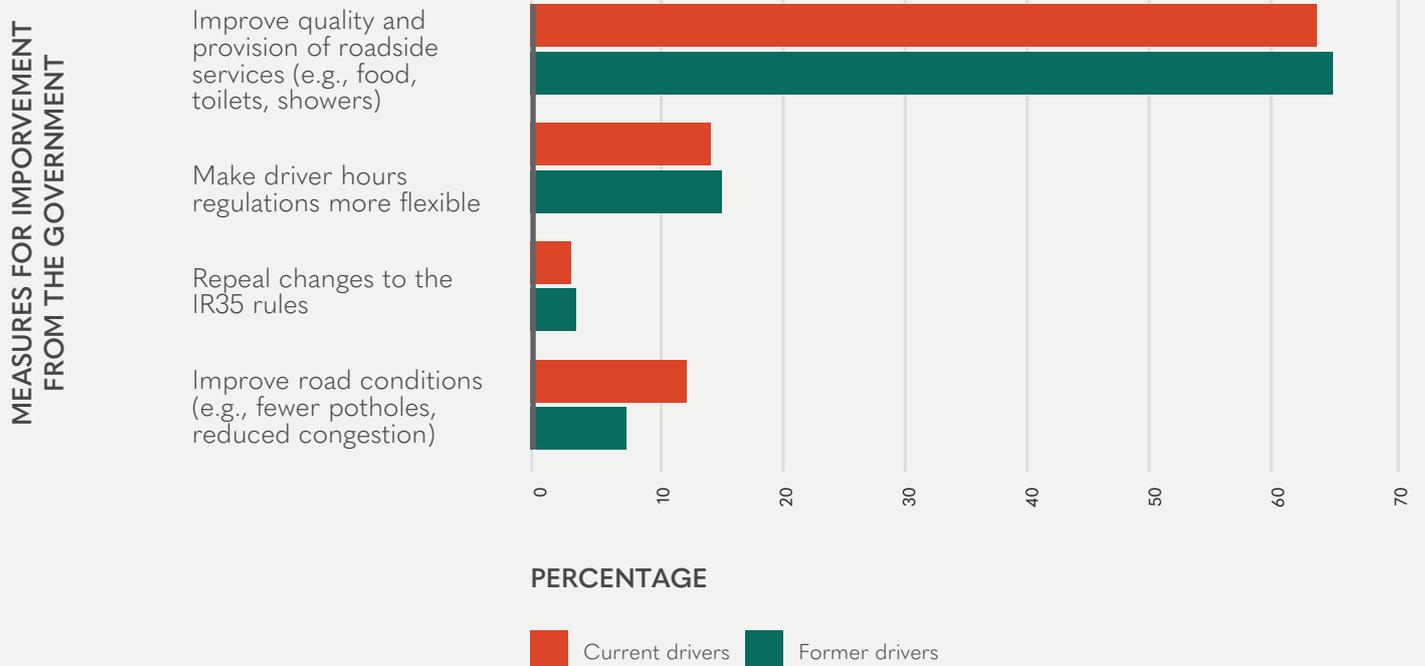
Next, we asked what the UK government could do to improve the working conditions for HGV drivers. We found that both current and former HGV drivers provided similar answers with a clear majority saying that the quality and provision of roadside services needed to be improved (Figure 7.2), followed by making driver hours regulations more flexible and improving road conditions (Box 7.2).



BOX 7.2. TOP 3 ACTIONS FOR THE UK GOVERNMENT

- Improve quality and provision of roadside services
- Make driver hours regulations more flexible
- Improve road conditions

Figure 7.3 Actions to be Taken by the UK Government Improve the Work-Lives of HGV Drivers



BOX 7.3 TRUCKERS' WORDS: PROFESSIONALISM, HYGIENE AND SAFETY

"It is difficult for professionals in the haulage industry to maintain a sense of professionalism when they are forced to resort to using bags for basic bodily functions. This practice not only undermines our dignity as individuals but also creates an unhygienic and unsafe working environment" (Current HGV Driver)

For both current (63%) and former (64%) HGV drivers, there is an overwhelming sense that the UK government's priorities to improve roadside services are necessary and important. This was also reported in the free text responses (Table 7.2), where drivers pointed to

the need for a wider network of services for drivers to use, including at delivery sites. The free-text responses show how the dignity of drivers is undermined by the lack of provision (Box 7.3).

The second highest response category related to driver hours regulation. This was extended in free-text responses, where respondents explained the ways that loopholes can be exploited by their employers to extend working hours, making 12–15-hour days the norm in HGV driving. This requires both regulatory and legal enforcement by the government, as well as changes to employers' activities.

While improving pay was seen to be a task for employers, respondents also noted that the UK government could initiate a national minimum wage for HGV drivers (Table 7.2) and enforce of drivers' hours regulations at the company level, rather than focusing on infringements by individual drivers – who can feel coerced into longer working hours by transport managers and routers.

Table 7.2. Truckers' Words Responses: Government Actions

ACTION	TRUCKERS' WORDS
<p>Reduce working hours and make drivers' hours regulations more flexible</p>	<p>'Driving hours should be tightened to stop employers planning 60-70+ hour working weeks. It is dangerous and humiliating'</p> <p>'Make it illegal to do 15 hours of duty hours, bring it down to 12 max. Too many tired drivers on the roads doing between 60 and 70 hours a week'</p> <p>'A little more flexibility about driving and working time breaks. Not a reduction in breaks, but wider windows where they can be taken...The pressure of finding places to break, at exactly the right time, whilst maximising driving and working hours is the most stressful part of the job'</p>
<p>Improve access to and quality of driver services</p>	<p>'Enforce the provision for facilities at every delivery point, many places simply don't take this seriously enough offering unsanitary conditions or facilities for drivers to use, for instance: temporary portaloos as a permanent fixture for drivers to use...I personally find this simply unacceptable and would hate to imagine what a female in the industry must endure having to use such facilities, particularly when it comes to feminine hygiene'</p> <p>'All above but also make food less expensive and more accessible. Go to services and try get a meal under £5'</p>
<p>Introduce a minimum wage for HGV drivers</p>	<p>'Put a minimum wage in place for HGV drivers that is more than the living wage, we are one of the most scrutinised sectors and have to undergo all sorts of training and have such high responsibilities when we go to our work, one small mistake could be catastrophic and we get paid very low rates compared to other so-called professionals'</p>
<p>Government support for childcare</p>	<p>'Provide support for women drivers with children, so that employers are able to offer that support without affecting their business'</p> <p>'Make it easier for single parents to work without worry'</p>
<p>Protections for agency workers</p>	<p>'There needs to be far greater scrutiny of trucking company and agency rules exploiting drivers as zero hours fodder with no rights and no expectation of reliable work and income. If agency workers follow the rules or complain about anything at all about bad client practice they are not asked back. Many agencies also cheat by effectively filling in test sheets for applicants...'</p>
<p>Education of car drivers</p>	<p>'Improve standard of non-vocational drivers, mandate learner drivers accompanying HGV drivers as part of learning to drive, raise awareness of blind spots and stopping distances of HGVs among other road users, criminalise abuse of HGV drivers (brake checking, cutting up, pulling out in front of HGVs, fuel/ load theft)'</p>
<p>Modify/re-evaluate the need for renewal of driver CPC</p>	<p>'Reduce the 35 hours required for the driver CPC for experienced drivers. It's expensive and time consuming. The modules were repeated in order to reach the 5x8 hours required'</p> <p>'Ditch the stupid money making CPC which no one learns anything from'</p>

CHAPTER 7 KEY FINDINGS



Both former and current HGV drivers agreed that increasing wages is the action employers need to take to improve the working lives of HGV drivers.



Both former and current HGV drivers agreed that improving the quality and provision of roadside services is the action that the government needs to take to improve the working lives of HGV drivers.



Pay, hours of work and working conditions coalesce to create an unsustainable work situation for some HGV drivers. Urgent action needs to be taken by both industry and the UK government to address these issues.

8. CONCLUSIONS AND RECOMMENDATIONS

This report has presented the findings of the largest survey of HGV drivers in the UK conducted to date. The report illuminates the views and voices of drivers, hitherto a significant omission in discussion of supply chain security and sustainability.

HGV driving is a critical job. Our findings signal why attracting and retaining HGV drivers has been a persistent challenge, despite recent efforts to diversify the labour force and attend to pay rates. Our findings also indicate some of the actions that need to be taken to make HGV driving an attractive and rewarding career choice for a diverse workforce.

The mobile nature of HGV driving work means that it is distinct from many other forms of work. Drivers are often hundreds or even thousands of miles from their homes, families and friends. Our survey findings show this has implications, not only for drivers' social lives but also for their caring responsibilities and physical and mental health.

At the same time, the experience of HGV driving work is highly variable. Experiences influence upon HGV driver satisfaction levels, and are both positive and negative. The key characteristics shaping worker experience identified by the Trucking Lives survey are: personal characteristics, especially gender, age, sexuality, ethnicity and caring responsibilities; and employment

characteristics, specifically contract type, employment type, working hours, years of experience, company size, class of HGV driven and the number of nights spent away from home ('tramping').

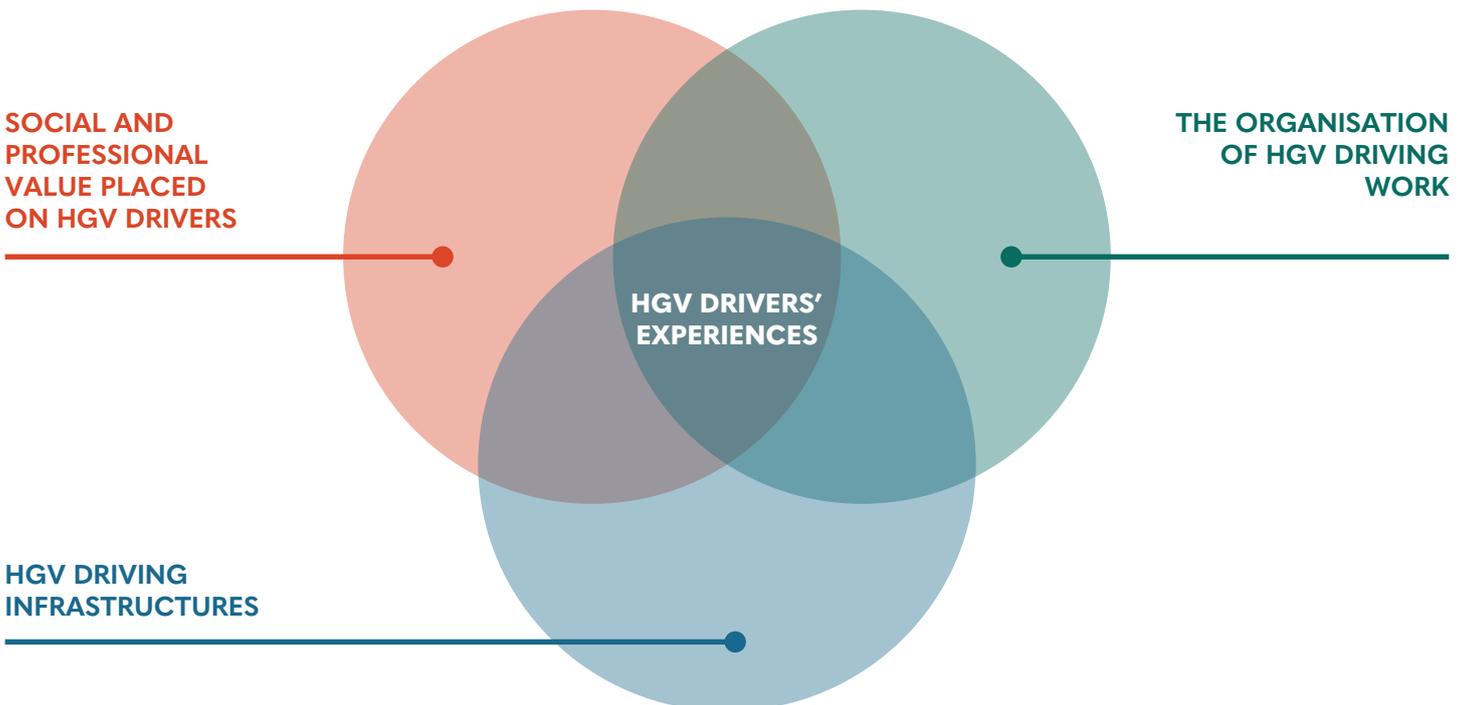
8.1 THREE INTERSECTING DIMENSIONS OF HGV DRIVERS' EXPERIENCES

From the findings presented in this report, we identify three intersecting dimensions of HGV driving which shape how HGV drivers experience their job. These dimensions show where interventions could usefully be focused to address issues of driver retention and recruitment. We characterise these as: (1) the social and professional value placed on HGV drivers, (2) HGV driving infrastructures, and (3) the organisation of HGV driving work (Figure 8.1). We suggest that HGV driver experience sits at the nexus of these dimensions, which intersect and overlap, affecting one another.

(1) Social and professional value placed on HGV drivers

HGV driving fulfils an important social and economic role, and drivers enjoy many aspects of their jobs including the friendliness of other HGV drivers, and being able to use their own initiative. Yet HGV drivers experience widespread disrespect. They also suffer indignity as a result of lack of respect. Disrespect stems from a number of sources, including government organisations, media,

Figure 8.1 Three Dimensions Affecting HGV Drivers' Experiences



colleagues in haulage companies (e.g., transport managers, routers), the sector (e.g., customers, depot staff, warehouse workers) and the wider public. Disrespect and indignity manifest in the day-to-day treatment of drivers by those they interact with; in the allocation of work and its consequences; in pay rates, and in the provision of, and access to, facilities including toilets.

The systemic devaluation of HGV drivers and low recognition of the vital work that HGV drivers do has a major effect on worker satisfaction.

(2) HGV driving infrastructures

Driving infrastructures are what make driving possible; they also support drivers whilst they are on the move. HGV drivers share some of this infrastructure with other drivers, in the form of roads and allied, chiefly motorway, service stations. Other parts of this infrastructure are unique to HGV drivers – trucks and in-truck facilities, truck stops, and various depots, warehouses and distribution centres. Provision (the availability of infrastructures), access (being allowed to use available infrastructures) and the quality of the provision are important to the overall HGV driver experience.

Inadequate infrastructure can result in mental and physical health issues (e.g., through being denied access to toilets). It can heighten the risk of extended working days, when road congestion forces drivers over their working hours – a particular issue for those with caring responsibilities. It can also cause major ‘spill-over effects’ e.g., the lack of truck waiting provision at distribution centres, ports and fulfilment centres results in HGV over-parking in un-serviced proximate neighbourhoods, and its consequences – litter and human waste.

Driving infrastructures are critical to how HGV drivers experience their job. The infrastructural experience can vary on a day-to-day basis depending on the job a driver is allocated. Inadequate provision, access and quality of roadside services, worsening traffic congestion and road closures, and ill-equipped vehicles all impact negatively on HGV driver experience.

(3) The organisation of HGV driving work

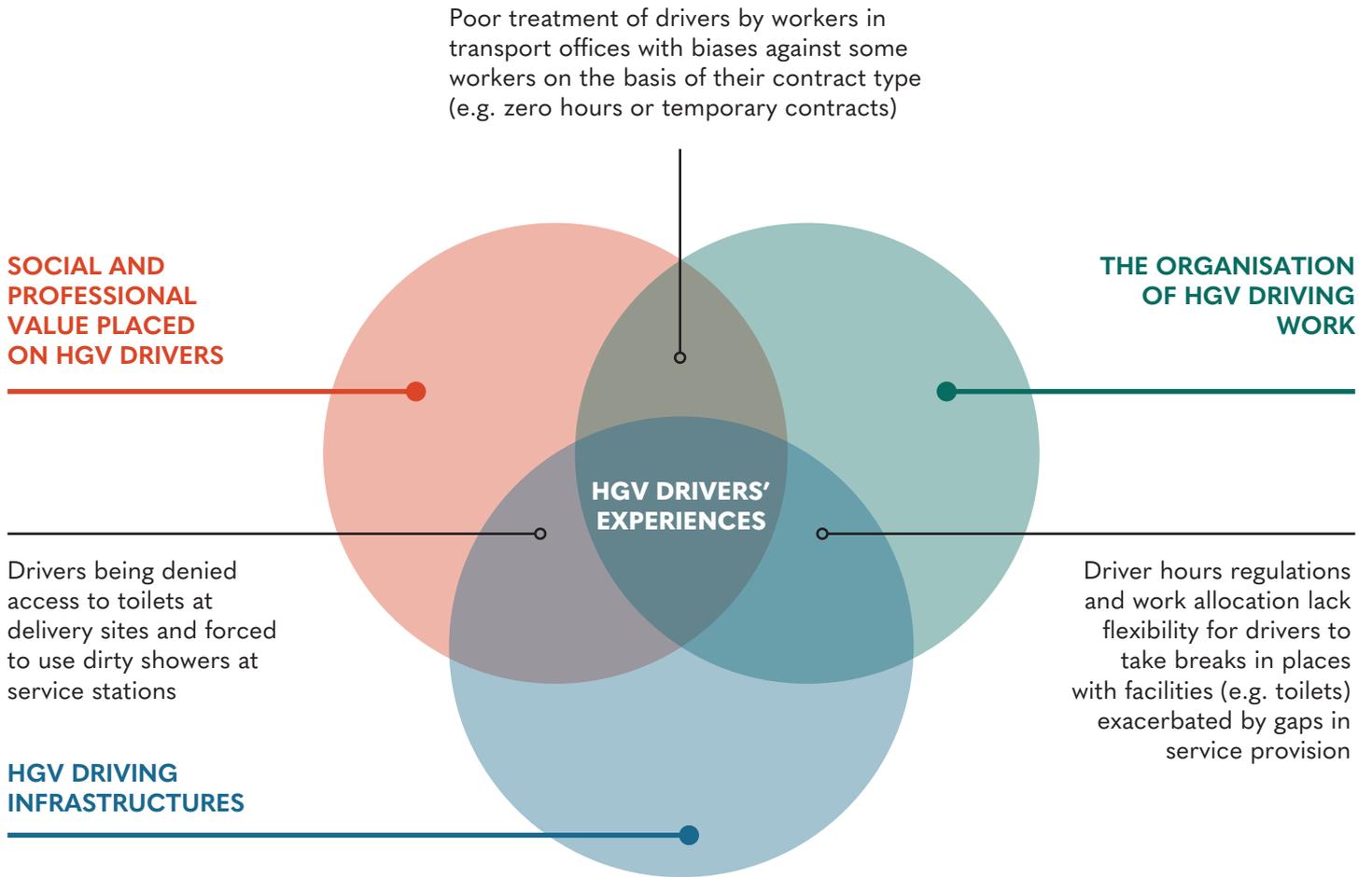
HGV driving work is shaped by logistics and its interface with the regulatory environment governing driving work. Within the haulage industry, the regulatory environment has long been understood as defined by, and limited to, the legislation governing drivers’ working time – in practice, not exceeding the maximum that an individual driver can work per day, week or fortnight. Recognition of the variety of working arrangements available in other sectors has therefore been limited. This has had historical effects on labour force diversity.

Logistics, in the form of inter-linked software and data management systems, is the primary means by which supply chains are held together and goods flow around the world and within countries. Yet logistical systems overlook the people on whom moving goods is dependent. They favour business efficiency and ‘the bottom line’ over workers’ conditions and well-being. A consequence is that logistics, left to its own devices, will construct ‘jobs’ in ways that often reinforce working norms that are incompatible with life outside of work, including long hours. Poor remuneration is often a consequence.

Logistical systems also have major effects on how all HGV drivers’ experience their job on a day-to-day basis. Within haulage companies, the transport planners and routers who use these logistical systems play a key role in job allocation, matching individual drivers and their available working hours to particular jobs on a day-to-day basis. Transport planners can reinforce biases towards some workers (i.e., on the basis of their gender, or their contractual status).

These three dimensions: value, infrastructures and organisation, interconnect and influence one another creating experiences that are unique to the sector and which need addressing if worker satisfaction is to be improved (Figure 8.2).

Figure 8.2. Examples of Experiences at the Intersections of the Three Dimensions



In Table 8.1, we outline recommendations that arise from the research presented in this report. The recommendations are framed in terms of the three intersecting dimensions of HGV driving. The

recommendations vary in the resources they would require to implement, and the organisations that would need to be involved, but we identify the key stakeholder groups needed to take forward the proposed actions.

Table 8.1. Recommendations

DIMENSION	WHAT DO UK HGV DRIVERS NEED?	HOW MIGHT THIS BE ACHIEVED?	WHO NEEDS TO LEAD ACTION?
<p>The systemic devaluation of HGV drivers and low recognition of the vital work that HGV drivers do</p>	<ul style="list-style-type: none"> Widespread recognition of the role HGV drivers play in the economy, specifically in maintaining functioning supply chains Respect for HGV drivers and their work within and beyond the road freight sector Better awareness and appreciation from the car-driving public of how to share the road safely with HGVs 	<ol style="list-style-type: none"> Campaigns to communicate the role HGV drivers play in the national economy and in our daily lives Sectoral activities within road haulage which recognise the challenges of HGV driving and which work to promote best practice for the fair and equal treatment of all workers Support car driver awareness of the unique demands of HGVs (including, stopping distance and manoeuvre space) through the theory and practical driving license process 	<p>Department for Transport</p> <p>Road Haulage Association; Logistics UK; Haulage firms</p> <p>Driver and Vehicle Licensing Agency</p>

<p>Driving infrastructures, specifically inadequate provision, access and quality of roadside services, worsening traffic congestion and road closures, and ill-equipped vehicles</p>	<ul style="list-style-type: none"> • Access to high quality toilets and showers, rest spaces and healthy, affordable food and drink options • Provision of services across the primary road network which recognises the location of key hubs and nodes in the HGV driving network • Mandated access to toilets at all HGV delivery sites 	<ol style="list-style-type: none"> 1. Map existing provision of UK roadside HGV-accessible services across motorway and A-road networks, to identify 'deserts' and 'hot spots' 2. Invest in renewing and updating provision and extending services in ways that connect with the HGV driving network 3. Work with distribution centres, warehousing complexes, ports and fulfilment centres to prevent backlogs of HGVs on surrounding roads (e.g. through conditional planning approvals) 4. Ensure provision of affordable and healthy food options for HGV drivers 5. Establish minimum standards of service provisions at roadside services within the UK and a means to their maintenance 6. Enforce regulation on access to toilets 	<p>Department for Transport; National Highways</p> <p>Central and local government</p> <p>Distribution Centres; local government</p> <p>Department for Transport</p> <p>Department for Transport</p> <p>Health and Safety Executive</p>
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<p>Logistics being concerned with moving goods efficiently, not with the people who move goods</p>	<ul style="list-style-type: none"> • Better and fair pay and transparent working conditions • Working hours that are compatible with leading healthy, fulfilling lives outside of work • Daily work-loads that are realistic and achievable and which recognise the reality of driving on the UK's road network • A work environment free from harassment and bias • Work contracts which reflect the realities of HGV driving work and which are mutually agreed by the worker and employer 	<ol style="list-style-type: none"> 1. Sector-wide benchmarking of pay including overtime provisions and payment for secure overnight parking 2. Work across the sector to design career pathways which reflect the needs of a diversity of workers 3. Develop case studies of how diverse work arrangements (e.g., flexitime, part-time work) can be adopted by the sector to support HGV drivers 4. Explore the ways that existing software reinforces biases in the allocation of work, and seek modifications which can reflect worker needs 5. Establish sectoral mechanism for reporting and acting on worker harassment within the logistics sector 6. Invest in cross-sectoral training for haulage operators on themes including unconscious bias, diversity and communication 7. Evaluate the diversity of work contracts and employment arrangements and ensure that worker rights are maintained 	<p>Road Haulage Association; Department for Transport</p> <p>Department for Work and Pensions</p> <p>Road Haulage Association; CIPD</p> <p>Road Haulage Association; Logistics UK</p> <p>Department for Transport</p> <p>Department for Transport; Department for Work and Pensions</p> <p>Road Haulage Association; CIPD; Workers unions</p>
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8.2 A PATHWAY TO TRANSFORM HGV DRIVING WORK

Reporting the findings of the Trucking Lives survey of HGV drivers in the UK is a starting point for raising the profile of HGV drivers' working lives, and adding drivers' voices to discussions on improving their working conditions.

Responding to these findings and taking the recommendations forward will require collaboration across the road haulage sector, government and businesses and organisations serviced by HGVs. Collaborations already exist – including between the Department for Transport, the Road Haulage Association, Logistics UK and haulage firms. But new partnerships which create space for HGV drivers and their representation may be required to enact the types of changes that are needed to sustain the workforce in the long term.

The transformation of HGV driving work needs to happen in parallel with recognition of the wider landscape shaping the UK road haulage sector. Key trends include:

- Changing patterns of consumer demand associated with the digital economy leading to new shopping patterns and a spatial reconfiguration of supply chains
- The emergence and mainstreaming of smart technologies, artificial intelligence and vehicle automation and their application in the logistics sector
- Air pollution and climate breakdown leading to pressure for the sector to reduce road freight emissions and move towards zero carbon freight vehicles and alternative fuel systems

These trends represent opportunities and threats to the sector. They have the potential to affect the work that HGV drivers do. It is therefore important that the HGV driving workforce, and their needs, is included in discussions on the future of road freight in the UK.

8.3 NEXT STEPS

The findings presented in this report will be reviewed with industry and government stakeholders. The intention is to co-design strategies for transforming HGV drivers' working lives in ways that acknowledge the importance of the work they do, and the contributions this workforce makes to the national economy as well as to sustaining ways of life for multiple communities.

If you would like to follow the Trucking Lives project, including further research to come out of the project, please check out our webpage: www.truckinglives.co.uk or contact us at: truckinglives@conted.ox.ac.uk

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