NHVR

Heavy Vehicle Industry Safety Survey 2022

Final Report

September 2022

insync

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Contents

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01
Executive Summary

Executive Summary

Survey Background and Methodology

Context

The NHVR Industry Safety Survey seeks to measure the way the Heavy Vehicle Industry manages its safety responsibilities. This is the third iteration, with surveys previously completed in 2018 & 2020.

The 2022 NHVR Industry Safety Survey was conducted in June, July and August to continue benchmarking safety performance, measure the success of future initiatives and to provide a management tool for identifying improvement opportunities.

The survey is also used as a tool for measuring important topics including:

- Awareness, uptake and usefulness of the NHVR SMS guidance materials
- Acceptance and understanding of heavy vehicle safety technology
- Preferred method of contact for stakeholders to receive safety information from the NHVR
- Primary sources of information or training received regarding Chain of Responsibility (CoR)

Survey Overview

The 2022 NHVR Industry Safety Survey was designed, developed and conducted by Insync, in collaboration with the NHVR.

The survey was conducted online, utilising NHVR's available databases, as well as via an open link on various NHVR digital channels.

Survey Validity and Participant Profile

Survey Specifications

The 2022 NHVR Industry Safety Survey benchmark sample size was close to 6,000 industry participants, including 9% of email recipients who were invited to participate.

This sample is more robust than the 2020 study which collected feedback from almost 4,000 respondents.

The 2022 survey sample provides the NHVR with a very reliable and trustworthy survey result, with a 95% confidence interval and +/- 0.90% margin for error.

Survey Participants

The 2022 NHVR Industry Safety Survey participants consisted of Management (43%), Drivers (41%), Administrators (10%), Coordinators (3%) and Schedulers (1%).

Drivers were further classified by whether they owned their own vehicle (29% of total) or were employed (8%) or contracted (4%) by a business.

Business size was also represented (measured by both number of heavy vehicles and employee head count), with participants from small businesses making up around three fifths (60%) of the sample (2 -10 vehicles).

Industry Sector and Business Base (State) demographics were also collected allowing for further breakdown of those variables.

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Executive Summary

Key Findings

Implementation of a basic SMS

Basic SMS implementation is used to assess changes towards improvement targets in industry safety capability. The baseline measure of basic SMS implementation is whether there are risk management processes in place and are operational.

Almost two-thirds (65%) of industry respondents indicate that they have a basic SMS in their business, which shows a small improvement since 2020 (63%). Businesses with 11 to 20 employees have the highest implementation rate (70%), though organisations of all sizes are relatively consistent in regards to their SMS implementation.

Performance Based Standards (PBS)

Organisations who reported their business had Performance Based Standards (PBS) vehicles had higher rates of SMS implementation than those who do not (70% v 64%).

Improvements since 2020

Overall scores across all items are stronger since 2020, with the biggest increase among the Safety Assurance, Promotion and training and General Business items.

Positively, scores regarding Safety Practices overall are also higher in 2022, particularly for the review of staff safety related training needs.

Scores for Drivers and Management items continue to perform consistently with the results seen in 2020, with marginal increases in areas.

Awareness and usefulness of NHVR SMS guidance materials

Approximately one in three (35%) respondents use the NHVR SMS guidance materials. Of these respondents, almost all (97%-99%) report that they are useful.

Safety implementation of accreditation scheme participants

Almost two in five (38%) respondents report their business to be in a heavy vehicle accreditation scheme, with most respondents in NHVAS (95%). Fewer respondents are in WAHVA (13%), TruckSafe (9%) or CraneSafe (1%).

Heavy vehicle Safety Technology

Antilock Braking Systems (87%), Daytime Running Lamps (81%) and Reversing Safety Systems (80%) are the Heavy Vehicle Safety technologies respondents understand the most. The technologies respondents say they have the least understanding include Autonomous Braking Systems (64%) and side and rear underrun protection systems (65%).

Opportunities for Improvement

Participant recruitment

The 2022 NHVR Industry Safety Survey had a larger sample size than the 2020 Study and continues to provide reliable results. To ensure a higher response rate, the NHVR may consider stronger pre-survey communications in partnership with relevant industry bodies. Further qualitative analysis (i.e. focus groups) may also provide a greater dimension for insights.

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02
Introduction

Introduction

About the survey

Timing

The NHVR Industry Safety Survey was conducted during June, July & August 2022 and was open for 1.5 months from 30th June – 15th August.

Survey design

The Industry Safety Survey was designed by the NHVR in conjunction with Insync to measure the extent to which businesses within the heavy vehicle industry have implemented a successfully operational basic Safety Management System (SMS).

With this purpose in mind, sub-sets of questions were included that explored the following topics:

- Business Management
- Safety Risk Management
- Safety Assurance
- Safety promotion and training
- Frequency and review of safety practices
- Chain of Responsibility

Depending on the topic, respondents were asked to rate the questions using one of the below (5 point) rating scales.

Throughout this report, results are measured in terms of 'favourable' being the combined proportion of respondents who agree or strongly agree with a question or rate their frequency as often / always.

Agreement:	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Frequency:	Never	Rarely	Sometimes	Often	Always

Role specific questions

To ensure that each participant responded to relevant topics, a further set of question branching was also used.

For example, only those respondents who classified themselves as Management or Drivers were asked the questions pertaining to driver related safety practices.

Other information measured

The survey also provided an opportunity for measuring other important topics to assist the NHVR with future planning.

Including:

- Awareness, uptake and usefulness of the SMS guidance materials
- Acceptance and understanding of vehicle safety technology
- Preferred method of contact for stakeholders (ie. the best way for them to receive information from the NHVR)
- Sources of information and/or training regarding Chain of Responsibility

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03
Survey coverage and demographics

Survey coverage and demographics

About the sample

Audience

The survey was distributed to **64,895** stakeholders across different industry sectors, taken from a list compiled by the NHVR using available email addresses from the regulatory platform and NHVAS participants. These stakeholders were invited to participate via direct email.

This included a significantly increased population compared with the 2020 study where direct invitations were sent to approximately 36,300 stakeholders.

However, understanding that there are approximately 200,000 people in the Australian road freight industry, in an attempt to also reach the large proportion of the industry population not currently registered with the NHVR, additional access to the survey was provided via a kiosk link published on various NHVR media channels.

Demographics

The survey captured a multitude of demographic categories to assist with identifying gaps and trends across different cohorts.

Categories included:

- Individual role
- Industry sector
- Where goods are transported
- State/Territory base
- Approx. head count
- Approx. number of vehicles
- If any PBS Vehicles

- Businesses in an accreditation scheme
- Which accreditation scheme businesses are in
- NHVAS modules
- Approx. time working in the heavy vehicle industry

Participation

5,750 responses were captured overall

5,193 via email (3,565 complete, 1,628 partially complete)

557 via open link (322 complete, 235 partially complete)

A **9%** response rate was achieved from email recipients, giving a very reliable and trustworthy sample size with a 95% confidence interval and +/- 0.90% margin for error.

This representative sample is larger, sharper and thus more statistically reliable than the 2020 study which captured a total of 3,927 respondents.

The largest voice

A broad demographic profile is represented in 2022 respondents, with the largest voice coming from those…

In the role:	Management (43%) or Driver (41%)	
Based in:	VIC (49%), NSW (20%) or QLD (15%)	
In the industry:	General Freight (20%) Primary production / farming (20%)	
Working:	20+ years (51%) Small business with 2 to 10 employees (60%)	
Transporting:	Locally (58%)	
Owning or operating:	2 to 10 heavy vehicles (30%)	

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Survey coverage and demographics

Demographic profile

Detailed view

The survey provides an invaluable resource for the industry with representation from a multitude of roles and business sizes.

As well as industry sectors and locations (shown on the following page).

Role	n	%
Management	2457	43%
Driver	2375	41%
Administration	598	10%
Coordinator	193	3%
Scheduler	68	1%
Loader	22	0%

Number of heavy vehicles operated by business	n	%
Note: NOT asked of Owner-drivers		
1	578	10%
2 to 10	1719	30%
11 to 20	490	9%
21 to 50	478	8%
51 to 100	252	4%
101 to 200	143	2%
200+	222	4%
Unsure	84	1%

Driver – sub category	n	%
Own and drive your own vehicle	1672	29%
Employed by a business	477	8%
Sub-contract for a business	225	4%

Number of heavy vehicles owned or operated	n	%
Note: ONLY asked of Owner-drivers or Drivers who Sub-contract for a business		
None	13	0.2%
1	1114	19%
2 to 5	649	11%
6 to 10	39	0.7%
11 to 20	12	0.2%
21 to 50	1	<0.1%
50 +	1	<0.1%
Unsure	4	0.1%

Approximate head count	n	%
2 to 10	3426	60%
11 to 20	524	9%
21 to 50	516	9%
51 to 100	349	6%
101 to 200	199	3%
201 to 300	88	2%
301 to 400	44	1%
401 to 500	29	1%
500+	194	3%
Unsure	205	4%

% of ALL respondents and relative frequencies are shown within each table

Note: A full breakdown of respondents across ALL demographic categories is also available in the appendix of this report.

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Survey coverage and demographics

Demographic profile

Detailed view (continued)

Primary Industry Sector	n	%
General Freight	1159	20%
Primary production/farming	1146	20%
Construction/landscape products	1041	18%
Other, please specify	707	12%
Livestock	205	4%
Oversize	196	3%
Car/equipment carrier	185	3%
Mining	173	3%
Dangerous Goods	154	3%
Buses	142	2%
Containers	135	2%
Waste	111	2%
Logging	99	2%
Crane	93	2%
Steel	91	2%
Government including local government	76	1%

Business base

NT **0.1%** (n=8)

QLD **15%** (n=587)

WA **1%** (n=68)

SA **7%** (n=414)

NSW **17%** (n=662)

ACT **1%** (n=31)

Multiple/Nationally **6%** (n=256)

VIC **48%** (n=1,914)

TAS **2%** (n=71)

*% of **ALL** respondents and relative frequencies are shown within each table/diagram*

*A list of sectors that respondents classified as 'other' is included on the following page.

Note: A full breakdown of respondents across ALL demographic categories is also available in the appendix of this report.

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Survey coverage and demographics

Demographic profile

Industry sector – 'other'

12% of respondents did not identify with the industry sectors listed in the survey demographic options, and instead chose 'other'.

Yet many of the industry sectors that respondents specified as being 'other' could in fact have been classified within the options that were already available for selection.

Industry sector
Relative frequency (n=3,944)

- Other
- Survey defined sectors

% of respondents (relative frequency shown above)

Industry sectors that respondents determined to be 'other'

- Agriculture
- Airfreight
- Asphalt / Asphalt Cartage
- Bulk - Freight / Grain
- Civil Construction & Earthmoving
- Concrete - Agitator / Pump
- Construction
- Earthmoving
- Entertainment & Film
- Fuel (incl. gas and oil)
- Food distribution
- Furniture removal
- Grain and Fertiliser
- Grocery
- Manufacturing
- Oil and Gas
- Quarry Products and Materials
- Refrigerated goods / food / transport
- Tippers
- Towing
- Water Cartage

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04
Assessment of industry safety capability

Assessment of industry safety capability

Implementation of a basic SMS

Introduction

The Industry Safety Survey 2022 provides a baseline measure of the way the heavy vehicle industry manages its safety responsibilities. The NHVR advocates that regardless of the size of a business, having an effective SMS can be one of the best ways of ensuring a safety focus. The NHVR assists the industry to implement an SMS by providing SMS guidance, education and materials.

The baseline measure of whether a basic SMS had been implemented is if risk management processes are in place and have been operationalised. This measure will be used to assess change towards improvement targets in industry safety capability.

Definition of a basic SMS

A specific set of questions has been used to define a SMS.

The questions measure the extent to which a business has safety controls in place and to what extent they are also operationalised.

They pertain to Business Management, Safety Risk Management, Safety Assurance and Safety Promotion and Training and are listed on the right of this page, as well as in the appendix of this report.

Survey questions measured

Business Management

- Management are visible in the workplace and demonstrate an interest in safety
- Safety is an important part of all business activity and decision making
- I feel safe at work

Safety Risk Management

- Incidents are reported
- Risks are assessed
- Risk controls are put into place to manage risks
- Risk controls are communicated to staff

Safety Assurance

- Employees are able to say no when asked to undertake an activity if they believe it is unsafe
- There is a process in place to investigate safety issues

Safety Promotion and Training

- Safety related information is communicated to all staff
- Relevant safety training is provided on an ongoing basis

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Assessment of industry safety capability

Implementation of a basic SMS

Overview of the industry (all respondents)

65%

(+3% since 2020)

of the heavy vehicle industry indicated that they had a basic SMS in their business

This means that 65% of those respondents who answered <u>every</u> question (shown to the right) scored each question favourably with a 4 or a 5.
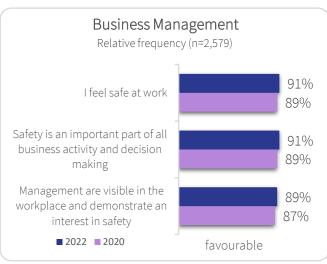
Highest implementation areas (overall)

Respondents report slightly higher scores in all areas of implementing basic SMS.

They are highly likely to feel safe at work and be able to say no to undertaking potentially unsafe activities.

A similarly high proportion of respondents feel favourably towards reported incidents.

Lowest implementation areas (overall)

While the provision of regular and relevant safety training remains comparatively least favourable, this has also improved slightly since 2020.

Business Management
Relative frequency (n=2,579)

	2022	2020
I feel safe at work	91%	89%
Safety is an important part of all business activity and decision making	91%	89%
Management are visible in the workplace and demonstrate an interest in safety	89%	87%

■ 2022 ■ 2020   favourable

Safety Assurance
Relative frequency (n=2,579)

	2022	2020
Employees are able to say no when asked to undertake an activity if they believe it is unsafe	92%	89%
There is a process in place to investigate safety issues	86%	84%

■ 2022 ■ 2020   favourable

Safety Risk Management
Relative frequency (n=2,579)

	2022	2020
Incidents are reported	90%	90%
Risks are assessed	89%	88%
Risk controls are put into place to manage risks	89%	87%
Risk controls are communicated to staff	88%	86%

■ 2022 ■ 2020   favourable

Safety Promotion and Training
Relative frequency (n=2,579)

	2022	2020
Safety related information is communicated to all staff	89%	86%
Relevant safety training is provided on an ongoing basis	79%	76%

■ 2022 ■ 2020   favourable

% of respondents (relative frequencies shown above)
Note: *The survey questions shown pertain to the definition of a basic SMS as outlined in the appendix of this report.*
The results shown are based on those respondents that answered the question with a 4 or 5 (agree/strongly agree).

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Assessment of industry safety capability

Implementation of a basic SMS

Implementation by business size

66% (+4%)	**67%** (+4%)	**70%** (+1%)	**68%** (-2%)	**65%** (+3%)	**66%** (+10%)	**64%** (+2%)
1	2 to 10	11 to 20	21 to 50	51 to 100	101 to 200	200+

% of each business size (as defined by the number of vehicles) that has a basic SMS

Organisations of differing business size perform relatively similarly to each other regarding implementation of a basic SMS.

Mid sized to large businesses (101-200 heavy vehicles) report the largest score increase since 2020 (+10%). In contrast, mid-sized business respondents with 21 -50 report a slight decrease (-2%).

Small to mid-sized businesses – 1 to 100 heavy vehicles

Small to mid-sized businesses (1-100 heavy vehicles) results are similar to the overall results, and there is strong favourability among items such as 'being able to say no when asked to undertake an activity they believe to be unsafe' and reporting incidents.

Businesses with only one employee scored comparatively lower in items regarding Safety Risk Management.

Businesses of this size score the lowest for the item 'Relevant safety training is provided on an ongoing basis'. The % favourable for this item incrementally decreases as business size grows.

Mid-sized to large businesses – 101 to 200+ heavy vehicles

While mid to large sized businesses report high scores for items such as having processes to investigate safety issues as well as reporting incidents, they are comparatively less favourable than smaller businesses, and have inconsistencies across the SMS items.

For example:

Item	101-200 (n=129)	200+ (n=202)
There is a process in place to investigate safety issues	92%	87%
Incidents are reported	91%	84%
Relevant safety training is provided on an ongoing basis	77%	72%
Risk controls are communicated to staff	82%	79%

% of respondents reporting favourably (relative frequencies shown above)

While there are pockets of comparatively lower performance, it should be noted that overall favourability remains strong, and at least seven in ten respondents score positively across each of the SMS implementation items, regardless of business size.

Note: The survey questions that pertain to the definition of a basic SMS and insights provided on this slide are outlined in the appendix of this report.

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Assessment of industry safety capability

Implementation of a basic SMS

Implementation by businesses with PBS vehicles

70%

(+3% since 2020)

of those <u>with PBS</u> vehicles
indicated that they had a basic
SMS in their business
(vs 64% of those without PBS vehicles)

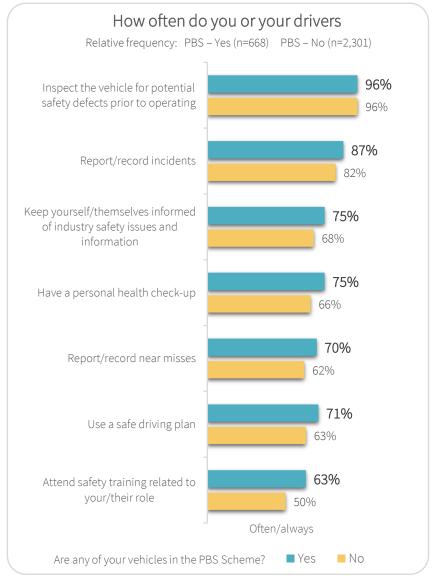### Comparison of businesses with or without PBS vehicles

Results were compared across those respondents who report their business as having Performance Based Standards (PBS) vehicles versus those who don't.

Similarities

The 2022 scores mirror the trend seen in the 2020 Industry Safety Survey results - regardless of having PBS vehicles or not, consistently high levels of favourability are reported regarding business management, feeling safe at work, having controls and processes in place and communication of safety related information.

Differences

The safety practice questions to the right highlight some differences. Though the scores range from 60-90%, it is clear that those with PBS vehicles have higher levels of frequency of all safety related behaviours.

How often do you or your drivers

Relative frequency: PBS – Yes (n=668)   PBS – No (n=2,301)

Inspect the vehicle for potential safety defects prior to operating
- Yes: 96%
- No: 96%

Report/record incidents
- Yes: 87%
- No: 82%

Keep yourself/themselves informed of industry safety issues and information
- Yes: 75%
- No: 68%

Have a personal health check-up
- Yes: 75%
- No: 66%

Report/record near misses
- Yes: 70%
- No: 62%

Use a safe driving plan
- Yes: 71%
- No: 63%

Attend safety training related to your/their role
- Yes: 63%
- No: 50%

Often/always

Are any of your vehicles in the PBS Scheme? ■ Yes ■ No

% of respondents (relative frequencies shown)

Note: The above questions were only asked of Management and Drivers

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Assessment of industry safety capability

Comparison of industry safety capability
2018 - 2020 - 2022

Introduction

The Industry Safety Survey 2022 provides a baseline measure of the way the heavy vehicle industry manages its safety responsibilities. The 2022 Industry Safety Survey continues to measure trends to identify changes in behaviours from 2018, to 2020 and now in 2022. It is noted that the survey population for the 2022 survey is the largest yet and contains a wider sample of the Industry.

Survey enhancements / changes

Since 2018, at the request of the NHVR, a number of improvements were made to the survey. These included changes to some of the questions to ensure that simple language was used and a change to the rating scale to increase usability of the survey.

For example, the 2020 survey used a 5pt rating scale throughout to measure levels of either agreement or frequency, depending on the question. Whereas the 2018 survey used varying rating scales with either 6 or 8pts including the option to select 'not applicable' or 'unsure', which was removed in 2020. In 2022, the survey continues to use the 5pt rating scale.

Whilst some changes occurred between the 2018 and 2020 iterations, the 2020 to 2022 survey is almost completely identical - the only change being the addition of the Chain of Responsibility questions (which can be found in the appendix).

Results comparison (indicative only for 2018-2020)

In an attempt to gain an understanding of where shifts may have occurred in the results between 2018 – 2020, those questions where the wording remained relatively consistent for both studies have been compared (although bearing in mind some rating scale alterations).

For results comparing 2020 to 2022, this is not needed and items can be compared directly.

2022	Management are visible in the workplace and demonstrate	89%
2020	an interest in safety	87%
2018	Management are committed to and actively support safety	88%

% of respondents reporting favourably (both surveys)

2022	Inspect the vehicle for potential safety defects prior to	96%
2020	operating*	95%
2018	Inspect vehicle for potential safety defects prior to operating*	97%

% of respondents reporting often/always (both surveys)

2022	Attend safety training related to your/their role*	54%
2020		51%
2018	Attend safety training related to your role*	51%

% of respondents reporting often/always (2022/2020) vs Monthly/Quarterly/6 monthly/Yearly (2018)

Other areas indicate some lifts and declines, which are presented on the following page.

Safety practice questions only asked of Management and Drivers.

Note: *The example survey questions shown pertain to the definition of a basic SMS as outlined in the appendix of this report.*

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Assessment of industry safety capability

Comparison of industry safety capability
2018 - 2020 - 2022

Improvements across the board

The levels of favourability in 2022 across all items has improved since 2020, with most scoring historically high scores since 2018.

Only one item (Incidents are reported) did not show any movement in overall % favourable since 2020 - however this item remains the highest scoring item in the list.

Respondents in 2022 are also more likely to keep themselves informed of safety issues and information as well as have personal health check ups. Though this result is stronger than in 2020, they are still indicatively lower than results in the 2018 study.

2022 **2020**	There is a process in place to investigate safety issues	86% 84%
2018	Our business has an incident investigations process	77%
2022 **2020**	Risks are assessed	89% 88%
2018	Hazards are risk assessed and mitigations/controls are in place	79%
2022 **2020**	Incidents are reported	90% 90%
2018	There is a formal process for reporting incidents	83%
2022 **2020**	Relevant safety training is provided on an ongoing basis	79% 76%
2018	There is recurrent role appropriate safety training provided to all staff	62%

% of respondents reporting favourably (both surveys)

2022 **2020**	Use a safe driving plan*	67% 63%
2018	Refer to a safe driving plan*	54%

% of respondents reporting often/always (both surveys)

2022 **2020**	Keep yourself/themselves informed of industry safety issues and information*	70% 67%
2018	Keep yourself informed of industry safety issues and information*	76%

% of respondents reporting often/always (both surveys)

2022 **2020**	Have a personal health check-up*	68% 64%
2018	Have a health check-up*	89%

% of respondents reporting often/always (2020) vs Monthly/Quarterly/6 monthly/Yearly (2018)

Safety practice questions only asked of Management and Drivers.

Note: The example survey questions shown pertain to the definition of a basic SMS as outlined in the appendix of this report.

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Assessment of industry safety capability

Management of safety in the HV Industry

Introduction

The NHVR requested an analysis of the results to identify key differences or areas of disconnect in the way safety is managed in the heavy vehicle industry.

Safety management practices

Comparison of the ten highest scoring items and the ten lowest scoring items reveals that the heavy vehicle industry overall performs better in everyday safety practices, risk assessments, reporting incidents and ensuring their workplace feels safe,

For example, 96% of respondents report that themselves or their drivers often or always 'inspect the vehicle for potential safety defects prior to operating' and 93% 'assess risks associated with the driving task e.g. weather conditions, road conditions' and 'feel they are able to raise concerns about safety issues', highlighting the industry's high awareness and consideration for operational risks

However, only 54% report that themselves or their drivers often or always 'attend safety training related to your/their role' and only 61% report that 'key safety personnel attend safety meetings or events.

10 highest scoring items	%
Inspect the vehicle for potential safety defects prior to operating*	96%
Employees feel that they are able to raise concerns about safety issues	93%
Assess risks associated with the driving task eg. weather conditions, road conditions	93%
Employees are able to say no when asked to undertake an activity if they believe it is unsafe	92%
Safety is an important part of all business activity and decision making	91%
I feel safe at work	91%
Our business actively considers safety risks	91%
Feel safe at work (you or your drivers)*	91%
Employees understand what is required to fulfil their safety responsibilities	90%
Incidents are reported	90%

10 lowest scoring items	%
Attend safety training related to your/their role*	54%
Key safety personnel attend safety meetings or events	61%
Staff are recognised or rewarded for making safety improvements	63%
Report/record near misses*	65%
Review of business safety objectives and targets	66%
Use a safe driving plan*	67%
Employee safety performance is reviewed	67%
Review of staff safety related training needs	68%
Have a personal health check-up*	68%
Safety roles, responsibilities and processes for managing safety are reviewed	68%

% of respondents scoring favourable / often/always (relative frequencies shown)
*Safety practice questions only asked of Management and Drivers.

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Assessment of industry safety capability

Management of safety in the HV Industry

Effectiveness of safety communications by role

Respondents reveal some inconsistencies in the effectiveness of communication channels regarding safety by role. Safety communications are comparatively less effective at reaching Drivers and Loaders as they are other staff. For example, 'Safety related information is communicated to all staff' is 93% favourable for Management and Coordinators, however, is only 79% for Drivers.

	Overall (n=3,614)	Management (n=1,948)	Coordinator (n=159)	Loader (n=15)	Scheduler (n=55)	Administration (n=474)	Driver (n=960)
Safety related information is communicated to all staff	89% [+3%]	93% [0%]	90% [-2%]	80% [+1%]	91% [+2%]	94% [+3%]	79% [+10%]
Risk controls are communicated to staff	88% [+2%]	93% [+1%]	90% [-3%]	76% [+10%]	87% [+1%]	93% [+2%]	78% [+7%]
Meetings are held regularly to discuss safety issues	77% [+3%]	80% [0%]	83% [+5%]	59% [-1%]	90% [+13%]	84% [+3%]	64% [+12%]

% of respondents who scored favourable – relative frequencies shown

There is a disconnect between how Management view the management of safety and how it is viewed by respondents in other roles. For example, 'Management actively seek feedback from staff about safety issues' was scored favourably by 86% of respondents in Management but only 66% and 73% by Drivers and Loaders (noting small sample) respectively. These scores have increased since 2020, and highlights this as an opportunity for continued efforts for management to reach out to staff regarding safety issues.

	Overall (n=4,052)	Management (n=2,170)	Coordinator (n=167)	Loader (n=17)	Scheduler (n=61)	Administration (n=509)	Driver (n=1,125)
Management are visible in the workplace and demonstrate an interest in safety	89% [+3%]	93% [0%]	93% [+2%]	100% [+33%]	97% [+3%]	94% [+2%]	80% [+9%]
Managers actively seek feedback from staff about safety issues	80% [+4%]	86% [+1%]	82% [+2%]	73% [+16%]	82% [+5%]	82% [+3%]	66% [+11%]
Communication from management about safety	76% [+2%]	82% [0%}	76% [-3%]	71% [+7%]	81% [+9%]	80% [+2%]	63% [+8%]

% of respondents who scored favourable – relative frequencies shown

Success. Mapped.

Assessment of industry safety capability

Management of safety in the HV Industry
Visibility of business' safety management practices by role

The visibility of respondents' business' safety management differs by role. Drivers and Loaders (noting small sample) report the lowest visibility, whereas Coordinators, Administrators and Management report the highest visibility of business' safety management practices. This trend is consistent with that seen in the 2020 results.

	Overall (n=4,047)	Management (n=2,168)	Coordinator (n=167)	Loader (n=17)	Scheduler (n=61)	Administration (n=508)	Driver (n=1,123)
Our business' safety policy is clear and known to everybody	86% [+2%]	89% [-1%]	90% [-1%]	76% [+3%]	89% [+1%]	91% [+3%]	78% [+9%]
Our business monitors and measures safety performance	78% [+4%]	81% [+2%]	81% [-5%]	60% [+3%]	89% [+19%]	85% [+6%]	67% [+9%]
Our business has dedicated key safety personnel	73% [0%]	75% [-1%]	82% [-3%]	53% [-20%]	79% [+2%]	81% [-2%]	63% [+7%]

Looking specifically at Drivers, Drivers employed by a business report lower visibility of their business' safety management than Sub-contractors or Owner-drivers.

Our business monitors and measures safety performance

Sub-contract for a business	0% 66%
Employed by a business	+7% 54%
Own and drive your own vehicle	+12% 77%

% Favourable

Our business has dedicated key safety personnel

Sub-contract for a business	+6% 67%
Employed by a business	+8% 58%
Own and drive your own vehicle	+6% 64%

% Favourable

Our business' safety policy is clear and known to everybody

Sub-contract for a business	+5% 78%
Employed by a business	+12% 69%
Own and drive your own vehicle	+6% 84%

% Favourable

% of respondents who scored favourable / often/always – relative frequencies shown

Success. Mapped.

Assessment of industry safety capability
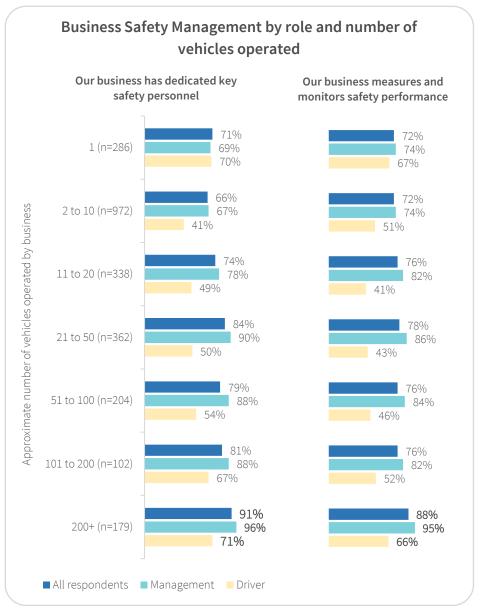
Management of safety in the HV Industry

Safety management practices by role and business size

Overall, respondents working in larger businesses operating 200+ vehicles are the most aware of dedicated key safety personnel at their business as well as stating their business measures and monitors safety performance.

Regarding Safety Management, however, Drivers score comparatively lower than Management across multiple areas.

Generally, Drivers working in businesses that operate more vehicles have a higher awareness of key safety personnel than Drivers in businesses with less vehicles.

This trend does not apply for Drivers working in businesses that operate only one vehicle. Drivers in this category have a greater awareness of safety personnel and how their business measures and monitors safety performance, similar to that of Managers.

Business Safety Management by role and number of vehicles operated

Our business has dedicated key safety personnel

Vehicles	All respondents	Management	Driver
1 (n=286)	71%	69%	70%
2 to 10 (n=972)	66%	67%	41%
11 to 20 (n=338)	74%	78%	49%
21 to 50 (n=362)	84%	90%	50%
51 to 100 (n=204)	79%	88%	54%
101 to 200 (n=102)	81%	88%	67%
200+ (n=179)	91%	96%	71%

Our business measures and monitors safety performance

Vehicles	All respondents	Management	Driver
1 (n=286)	72%	74%	67%
2 to 10 (n=972)	72%	74%	51%
11 to 20 (n=338)	76%	82%	41%
21 to 50 (n=362)	78%	86%	43%
51 to 100 (n=204)	76%	84%	46%
101 to 200 (n=102)	76%	82%	52%
200+ (n=179)	88%	95%	66%

Approximate number of vehicles operated by business

■ All respondents ■ Management ■ Driver

% of respondents (relative frequencies shown above)

Success. Mapped.

Assessment of industry safety capability

Owner driver – one vehicle

Introduction

Respondents who classified themselves as being an Owner-driver with just one vehicle were only asked a discreet set of questions relevant to them, pertaining to safety practices. Hence, their results for these questions have been analysed separately.

Overall, the number of Owner drivers performing safety practices have mostly improved since 2020.

Most frequently practiced

The safety practice with the highest level of frequency among Owner drivers with one vehicle, involves inspecting the vehicle for potential safety defects prior to operating (97% often/always).
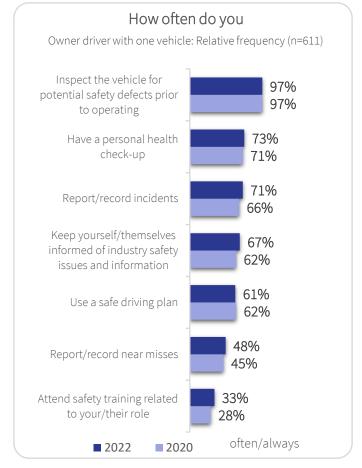
Having a personal health check-up has the next highest level of frequency with 73% of respondents reporting that they do this often or always, closely followed by reporting/recording incidents (71%) and keeping themselves informed of industry safety information (67%).

Least frequently practiced

All other safety practices show 61% or fewer respondents reporting that they do them often or always.

Three in five (61%) respondents often/always use a safe driving plan, and just under half (48%) report/record near misses.

Attending safety training related to their role is the least practiced safety factor, with on one in three (33%) stating they perform this often/always.

How often do you

Owner driver with one vehicle: Relative frequency (n=611)

Practice	2022	2020
Inspect the vehicle for potential safety defects prior to operating	97%	97%
Have a personal health check-up	73%	71%
Report/record incidents	71%	66%
Keep yourself/themselves informed of industry safety issues and information	67%	62%
Use a safe driving plan	61%	62%
Report/record near misses	48%	45%
Attend safety training related to your/their role	33%	28%

■ 2022 ■ 2020   often/always

% of respondents (relative frequencies shown above)

Note: The survey questions shown pertain to the definition of a basic SMS (behaviours specific to Drivers) as outlined in the appendix of this report.

Success. Mapped.

Assessment of industry safety capability

Owner driver – one vehicle

Improvements

In 2022, Owner drivers with one vehicle report slightly higher frequency in relation to having a personal health check-up, attending role related safety training and keeping themselves informed as shown by the results below.

2022 **2020**	Have a personal health check-up	73% 71%
2018	Have a health check-up	93%
2022 **2020**	Attend safety training related to your/their role	33% 28%
2018	Attend safety training related to your role	50%

% of respondents reporting often/always

2022 **2020**	Keep yourself/themselves informed of industry safety issues and information	67% 62%
2018	Keep yourself informed of industry safety issues and information	78%

% of respondents reporting often/always

Owner Drivers also record higher frequencies of reporting/recording incidents and near misses since 2020.

2022 **2020**	Report/record incidents	71% 66%
2018	Record and report incidents or near misses to your employer (when required)	46%
2022 **2020**	Report/record near misses	48% 45%
2018	Record and report incidents or near misses to your employer (when required)	46%

% of respondents reporting often/always (both surveys)

Declines

The only declining frequency is for Owner Drivers who utilise a safe driving plan, though the decrease is only marginal (-1%).

2022 **2020**	Inspect the vehicle for potential safety defects prior to operating	97% 97%
2018	Inspect vehicle for potential safety defects prior to operating	98%
2022 **2020**	Use a safe driving plan	61% 62%
2018	Refer to a safe driving plan	56%

% of respondents reporting often/always (both surveys)

Note: The survey questions shown pertain to the definition of a basic SMS (behaviours specific to Drivers) as outlined in the appendix of this report.

Success. Mapped.

Assessment of industry safety capability

Drivers – Sub-contract for a business

Contract safety specifications

Three in five Drivers (64%) who sub-contract for a business report having safety standards/requirements specified in their contract. This is slightly lower than the 68% figure in 2020.

Safety performance monitoring and reviewing

Over half of Drivers (55%) who subcontract for a business report their business as monitoring and reviewing their safety performance.
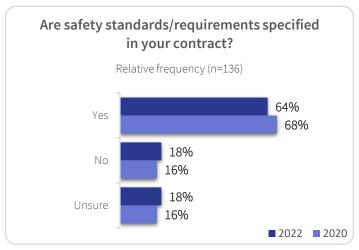
Results by sub-contractors in an accreditation scheme or not

Respondents also indicated that they are more likely to have safety standards/requirements specified in their contract and have their safety performance monitored or reviewed if the business they work for is in an accreditation scheme, indicating greater compliance.

29% of Driver sub-contractors reported the business they work for most as being **in an accreditation scheme**.

76% of those whose **business is in a scheme** reported **safety standards/requirements being specified in their contract**.

68% of those whose business is in a scheme reported their safety performance being monitored and reviewed.

Are safety standards/requirements specified in your contract?

Relative frequency (n=136)

	2022	2020
Yes	64%	68%
No	18%	16%
Unsure	18%	16%

% of respondents (relative frequencies shown)

Does the business monitor and review your safety performance?

Relative frequency (n=136)

	2022	2020
Yes	55%	51%
No	17%	21%
Unsure	28%	28%

% of respondents (relative frequencies shown)

Note: The above questions were asked specifically of Drivers who sub-contract for a business

Success. Mapped.

05
Target safety initiatives

Target safety initiatives

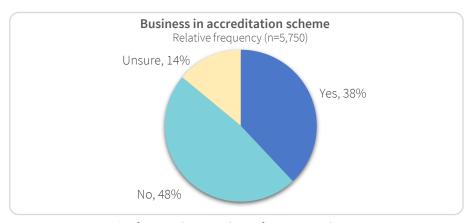## Safety implementation of accreditation scheme participants

Introduction

The NHVR supports participation in heavy vehicle accreditation schemes and recognises the relative road safety benefits of such schemes.

This section provides an insight into the responses of those participants whose business is in an accreditation scheme. As in the 2020 survey, the 2022 survey continues to include two regulatory schemes (NHVAS and WAHVA) and two industry schemes (TruckSafe and CraneSafe).

Coverage of heavy vehicle accreditation schemes

In 2022, **38%** of respondents report their business to be in a heavy vehicle accreditation scheme. This number remains consistent with the 2020 results, where 39% of respondents indicated their business is in an accreditation scheme.

The accreditation scheme with the highest number of respondents continues to be NHVAS (95%). Fewer respondents are in WAHVA (13%), Trucksafe (9%) or Cranesafe (1%).

Business in accreditation scheme
Relative frequency (n=5,750)

Unsure, 14%

Yes, 38%

No, 48%

% of respondents – relative frequencies shown

Which scheme is your business accredited in	%
National Heavy Vehicle Accreditation Scheme (NHVAS)	95%
Western Australia Heavy Vehicle Accreditation (WAHVA)	13%
TruckSafe	9%
CraneSafe	1%

% of respondents in an accreditation scheme – relative frequencies shown
Note: respondents may be in multiple schemes

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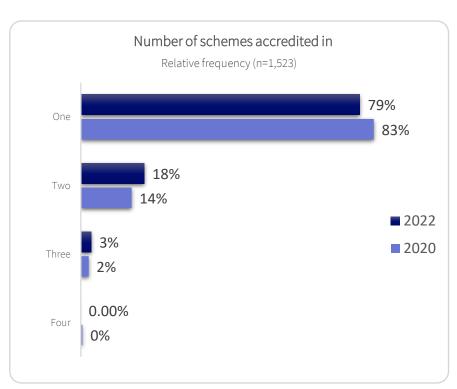
Target safety initiatives

Safety implementation of accreditation scheme participants

Participation in unique vs. multiple accreditation schemes

79% of respondents who reported being in an accreditation scheme are only in one scheme, most commonly NHVAS (74% of those in a scheme).

18% of respondents in a scheme are in two schemes - NHVAS and WAHVA is the most common combination (11%), followed by NHVAS and TruckSafe (7%).

Respondents are least likely to be in three schemes (3%) or four schemes (0.2%).

Number of schemes accredited in
Relative frequency (n=1,523)

Number	2022	2020
One	79%	83%
Two	18%	14%
Three	3%	2%
Four	0.00%	0%

■ 2022
■ 2020

% of those respondents in an accreditation scheme – relative frequency shown

Which scheme is your business accredited in?		n	%
One scheme	NHVAS only	1232	73.7%
	TruckSafe only	32	1.9%
	WAHVA only	52	3.1%
	CraneSafe only	11	0.7%
Two schemes	NHVAS + WAHVA	180	10.8%
	NHVAS + TruckSafe	111	6.6%
	NHVAS + CraneSafe	8	0.5%
	TruckSafe + WAHVA	1	0.1%
Three schemes	NHVAS + TruckSafe + WAHVA	35	2.1%
	NHVAS + TruckSafe + CraneSafe	1	0.1%
	NHVAS + WAHVA + CraneSafe	5	0.3%
	TruckSafe + WAHVA + CraneSafe	1	0.1%
Four schemes	NHVAS + TruckSafe + WAHVA + CraneSafe	3	0.2%

% of those respondents in an accreditation scheme – relative frequencies shown

Note: for the purposes of showing this breakdown, the numbers against each grouping are mutually exclusive eg. the respondents shown as being in two, three or four schemes are included in one grouping only.

Success. Mapped.

Target safety initiatives

Safety implementation of accreditation scheme participants

Implementation of a basic SMS by accreditation scheme

69% of those in an accreditation scheme indicated that they had a basic SMS in their business compared to **63%** for those who are **not** in a scheme. This number is slightly higher than in 2020, where 66% of those in an accreditation scheme indicated that they had a basic SMS in their business and 61% for those who are not in a scheme

Some further differences emerge in the implementation of a basic SMS based on which scheme the respondent is accredited in.

NHVAS vs TruckSafe

Safety Risk Management practices and perceived safety at work score more favourably for NHVAS accredited respondents than TruckSafe accredited.

NHVAS vs CraneSafe

When comparing scores from respondents in an NHVAS accreditation scheme to those accredited with CraneSafe, most basic SMS items score similarly. Overall, respondents in the CraneSafe accreditation scheme score Safety Risk Management items slightly more favourably, excluding the communication of safety related information to all staff.

NHVAS vs WAHVA

There were no significant differences between most of the basic SMS items for respondents accredited with NHVAS and with WAHVA. The item with the largest difference is 'Incidents are reported' which was more favourable for WAHVA accredited (94%) than NHVAS (91%).

Note: *The example survey questions shown pertain to the definition of a basic SMS as outlined in the appendix of this report.*

Note: *Respondents may be in multiple schemes.*

Success. Mapped.

Target safety initiatives

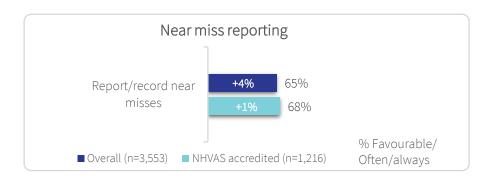## Baseline measure of elements relating to NHVAS

Introduction

The NHVR had implemented revised NHVAS Business Rules during 2020, which includes the requirement for participants to report major and significant occurrences giving the NHVR visibility of incidents for nominated drivers and vehicles.

This section provides an insight into current reporting behaviours of those participants whose business is in the NHVAS.

Near miss reporting

Overall, 65% of respondents indicate that near misses are reported or recorded often/always by themselves or their drivers, increasing from 61% in 2020.

Respondents from businesses in the NHVAS report a slightly higher proportion of frequent near miss reporting than respondents overall at 68%, which has also increased slightly from 67% in 2020.
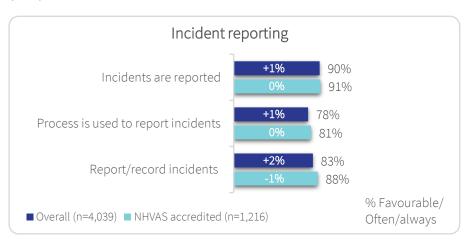
Near miss reporting

Report/record near misses
- Overall: +4% 65%
- NHVAS accredited: +1% 68%

% Favourable/ Often/always

■ Overall (n=3,553) ■ NHVAS accredited (n=1,216)

Incident reporting

Overall **90%** of respondents agree that incidents are reported at their business and 83% say incidents are reported by drivers frequently (often/always).

There is a comparatively lower proportion of respondents who agree that a process is often/frequently used to report incidents (78%).

For respondents in NHVAS accredited businesses, incident reporting remains largely consistent across all areas, aside from a slight decrease in 2022 regarding general reporting/recording of incidents (-1%).

Incident reporting

Incidents are reported
- Overall: +1% 90%
- NHVAS accredited: 0% 91%

Process is used to report incidents
- Overall: +1% 78%
- NHVAS accredited: 0% 81%

Report/record incidents
- Overall: +2% 83%
- NHVAS accredited: -1% 88%

% Favourable/ Often/always

■ Overall (n=4,039) ■ NHVAS accredited (n=1,216)

Success. Mapped.

Target safety initiatives

Baseline measure of elements relating to NHVAS

Safety training

The survey population reveal that within the heavy vehicle industry, businesses are slightly better at providing safety training at the time of induction (86%) than on an ongoing basis (79%).

Just over half of respondents (54%) state that drivers often/always attend safety training relevant to their role. Though comparatively lower to other Safety Training items, favourability has improved slightly at an overall level.

The review of staff safety related training occurs frequently at a fair level, with two-thirds of businesses (68%) stating they conduct these frequently and records of safety training are maintained in three quarters of businesses (75%).

In keeping with 2020 trends, respondents from businesses in the NHVAS report higher instances of safety training across all items.

NHVAS accredited businesses report substantially higher proportions of maintaining safety training records (+7%) and drivers regularly attending relevant training (+6%) than overall.

Safety training

	Overall (n=3,552)	NHVAS accredited (n=1,216)
Relevant safety training is provided to new staff at the time of induction	+5% → 86%	+4% → 88%
Relevant safety training is provided on an ongoing basis	+3% → 79%	+3% → 80%
Records of safety training are kept and maintained	+1% → 75%	0% → 82%
Review of staff safety related training needs	+3% → 68%	+2% → 69%
Attend safety training related to your/their role	+3% → 54%	0% → 60%

■ Overall (n=3,552)   ■ NHVAS accredited (n=1,216)

% Favourable/ Often/always

Success. Mapped.

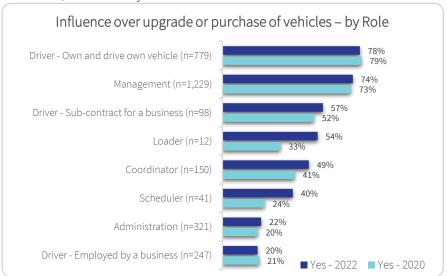# Target safety initiatives

Heavy Vehicle Safety Technology

Introduction

The following question was asked in 2020 to support the Vehicle Safety and Environmental Technology Uptake Plan (Vehicle SETUP), helping to capture a baseline measure of Industry's acceptance and understanding of vehicle safety technology. In 2022, the same question was included to see the trends over time.

Influence over purchase or upgrade of vehicles

In 2022, a slightly higher proportion of respondents reported having an influence over the upgrade or purchase of vehicles in their business, rising to **64%** from 61%.

Owner-drivers and those in Management continue to hold the greatest influence, followed by Drivers who sub-contract for a business.
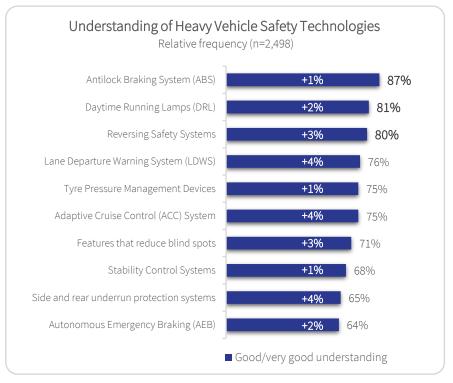
In 2022, Loaders and Schedulers recorded a higher level of influence over the upgrade or purchase of vehicles too, increasing by 21% and 16% respectively.

Level of understanding

In 2022, those who influence the upgrade or purchasing of new vehicles report continue to report the highest level of understanding regarding Antilock Braking Systems (ABS), Daytime Running Lamps (DRL) and Reversing Safety Systems.

Influence over upgrade or purchase of vehicles – by Role

Role	Yes - 2022	Yes - 2020
Driver - Own and drive own vehicle (n=779)	78%	79%
Management (n=1,229)	74%	73%
Driver - Sub-contract for a business (n=98)	57%	52%
Loader (n=12)	54%	33%
Coordinator (n=150)	49%	41%
Scheduler (n=41)	40%	24%
Administration (n=321)	22%	20%
Driver - Employed by a business (n=247)	20%	21%

% of respondents who indicated having an influence (relative frequencies shown above)

Understanding of Heavy Vehicle Safety Technologies
Relative frequency (n=2,498)

Technology	Change	Good/very good understanding
Antilock Braking System (ABS)	+1%	87%
Daytime Running Lamps (DRL)	+2%	81%
Reversing Safety Systems	+3%	80%
Lane Departure Warning System (LDWS)	+4%	76%
Tyre Pressure Management Devices	+1%	75%
Adaptive Cruise Control (ACC) System	+4%	75%
Features that reduce blind spots	+3%	71%
Stability Control Systems	+1%	68%
Side and rear underrun protection systems	+4%	65%
Autonomous Emergency Braking (AEB)	+2%	64%

% of respondents (relative frequency shown above)

Success. Mapped.

Target safety initiatives

Heavy Vehicle Safety Technology

Safety features importance by business size (as defined by the number of vehicles)

Levels of understanding regarding heavy vehicle safety technologies appear to increase with business size.

The more vehicles operated, the more understanding respondents appear to have regarding the technologies, with those working in larger businesses operating 200+ heavy vehicles reporting very high levels of understanding across most safety technologies, particularly for Antilock Braking Systems (90%) and Stability Control Systems (80%). Smaller organisations show comparatively lower levels of good/very good understanding.

Across the entire sample group, there is opportunity to further improve understanding across technologies such as Side and rear underrun protection and Adaptive Cruise Control (ACC) Systems, which score consistently low across all business sizes.

Business size (number of heavy vehicles operated)	n	Stability Control Systems	Autonomous Emergency Braking (AEB) System	Adaptive Cruise Control (ACC) System	Antilock Braking System (ABS)	Lane Departure Warning System (LDWS)	Daytime Running Lamps (DRL)	Tyre Pressure Management Devices	Reversing Safety Systems	Side and rear underrun protection	Features that reduce blind spots
All respondents	2,498	59%	47%	38%	77%	42%	43%	41%	64%	33%	68%
1	235	63%	54%	44%	77%	43%	43%	49%	69%	38%	71%
2 to 10	744	59%	45%	37%	79%	40%	43%	40%	65%	32%	67%
11 to 20	193	60%	49%	39%	81%	46%	47%	40%	67%	38%	67%
21 to 50	191	66%	52%	45%	81%	50%	44%	34%	59%	36%	68%
51 to 100	72	69%	63%	40%	79%	53%	46%	28%	65%	43%	75%
101 to 200	53	68%	55%	43%	89%	64%	57%	40%	74%	51%	74%
200+	71	80%	75%	55%	90%	72%	49%	31%	69%	54%	69%
Unsure	9	70%	40%	60%	78%	67%	67%	67%	78%	67%	67%

Legend: % of respondents within each business size who indicated a good/very good understanding   # 40-55%   # 56-70%   # 71-85%   # 86-100%

Success. Mapped.

Target safety initiatives

SMS Guidance Materials

Introduction

In 2018 the NHVR released a suite of SMS guidance and education materials to assist the heavy vehicle industry to implement an SMS.

This section analyses the industry's perceived awareness and usefulness of the NHVR SMS materials in 2022.

The results are intended to provide insights to support the SMS Enhancements 2020 project and further develop, enhance and promote SMS guidance material based on industry need, and to influence uptake of positive safety duties.

Overall Awareness

Some similarities are seen between the overall results and the view of those working in businesses operating 2 to 10 vehicles, as the proportion of such businesses make up almost half (43%) of the total sample group. However, there are more variations in the top and bottom scores seen in the 2022 results compared to 2020.

In both instances, the Loader role has the lowest awareness regarding the SMS Guidance Material on the NHVR website.

Regarding Industry, however, respondents in Bus organisations have the highest awareness overall, whereas Logging remains as the industry with the highest awareness among businesses operating 2-10 vehicles.

Some other differences also exist as shown in the table to the right (bearing in mind small numbers for some cohorts).

It should be noted overall, that general awareness is strong, with at least seven in ten respondents reporting they are aware of at least one of the SMS Materials listed.

Demographic cohort		Greatest awareness	Least awareness
Industry sector	2 to 10 vehicles	Logging (n=22)	Government (incl. Local) (n=18)
	All respondents	Buses (n=111)	Primary production/farming (n=74)
State/ Territory	2 to 10 vehicles	NSW (n=249) / Qld. (n=169)	WA (n=15)
	All respondents	NT (n=6)	ACT (n=31))
Role	2 to 10 vehicles	Scheduler (n=17)	Loader (n=7)
	All respondents	Administration (n=439)	Loader (n=13)

SMS Materials of greatest awareness

Checklists are the most well known SMS Guidance Material on NHVR's website for both all respondents and those in businesses operating 2 to 10 vehicles results respectively.

Similarly, both cohorts also report Fact Sheets as the next SMS Guidance material they are most aware of as well as Videos as the least.

Note: More detailed breakdowns are shown on the following pages as well as in the appendix of this report.

Success. Mapped.

Target safety initiatives

SMS Guidance Materials

Awareness, use and usefulness by business size of 2 to 10 vehicles

The suite of SMS guidance materials was developed to be scalable but targeted towards smaller business sizes. In 2020, NHVR requested detailed analysis of the results for smaller businesses in order to assess the level of awareness and usefulness of the materials in this cohort. In 2022, these results are again analysed for any historical trends.

Awareness of materials (by business size of 2 to 10 vehicles)

34% of respondents working in businesses operating 2 to 10 heavy vehicles report being aware of the SMS guidance materials available on the NHVR website. This highlights a relatively consistent proportion of respondents who are aware in 2020 (35%).
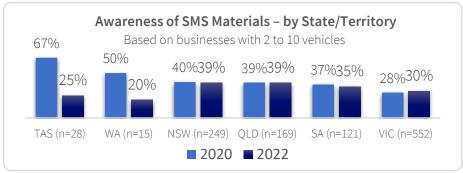
Demographic differences

Results by demographic cohort help to establish a better understanding of which respondents are more likely to be aware of the materials.

Differences are seen in reported awareness across States/Territories and Industry Sectors as shown to the right.

State/Territory base (by business size of 2 to 10 vehicles)

Those in WA based businesses reported the least awareness at 20%.

Awareness of SMS Materials – by State/Territory
Based on businesses with 2 to 10 vehicles

	2020	2022
TAS (n=28)	67%	25%
WA (n=15)	50%	20%
NSW (n=249)	40%	39%
QLD (n=169)	39%	39%
SA (n=121)	37%	35%
VIC (n=552)	28%	30%

% of respondents who report being aware – relative frequencies shown
Note: ACT and NT had <10 respondents each and are not shown.

Industry Sector (by business size of 2 to 10 vehicles)

Logging report the most awareness, Primary Production/farming report the least.

Greatest awareness		Least awareness	
Logging (n=22)	55% (-6%)	Primary production/farming (n=282)	26% (-3%)
Buses (n=27)	52% (+9%)		
Containers (n=22)	45% (-7%)	Mining (n=32)	28% (-3%)
Crane (n=19) /	42% (-5%)	Government (Incl. Local) (n=15)	28% (-1%)
Steel (n=19)	/ (+22%)	Car/Equipment Carrier (n=23)	29% (+7%)

% of respondents who report being aware – relative frequencies shown

Success. Mapped.
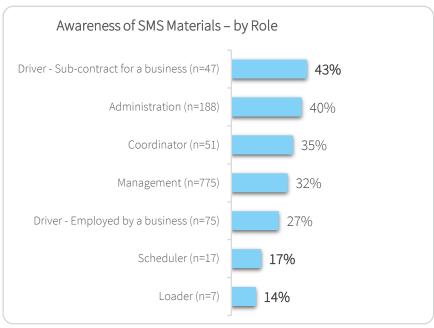
Target safety initiatives

SMS Guidance Materials

Demographic differences in awareness (continued)

Differences are also seen in reported awareness across Roles.

Role (by business size of 2 to 10 vehicles)

Sub-contracted drivers report the most awareness overall at 43% , closely followed by respondents in Administration (40%).

Loaders report the least awareness at only 14%, followed by Schedulers at 17%.

Awareness of each material (by business size of 2 to 10 vehicles)
By Role

All roles report average to high levels of awareness of all materials.

Coordinators report the most awareness across all materials, whereas Owner-drivers report the least (yet still relatively high).

Checklists have the most awareness regardless of role, along with Quick guides and Fact sheets.

Awareness of SMS Materials – by Role

Role	%
Driver - Sub-contract for a business (n=47)	43%
Administration (n=188)	40%
Coordinator (n=51)	35%
Management (n=775)	32%
Driver - Employed by a business (n=75)	27%
Scheduler (n=17)	17%
Loader (n=7)	14%

% of respondents (relative frequencies shown above)

Awareness by Role	n	Checklist(s)	Template(s)	Quick guide(s)	Fact sheet(s)	Worked example(s)	Video(s)
Management	244	92%	78%	78%	82%	70%	66%
Coordinator	18	83%	89%	94%	89%	89%	72%
Scheduler	8	88%	88%	88%	88%	88%	88%
Administration	76	89%	84%	82%	87%	75%	74%
Driver – Employed by business	20	90%	55%	60%	70%	55%	60%
Driver – Sub-contractor	15	90%	70%	80%	75%	80%	70%

% of respondents who report being aware of each material (relative frequencies shown)

Note: 'Driver - Own and drive own vehicle' had <5 respondents and are not shown.

Success. Mapped.

Target safety initiatives

SMS Guidance Materials

Uptake by Role (by business size of 2 to 10 vehicles)

Uptake results by Role help to establish a better understanding of which respondents are using the materials and if there are specific materials they are more likely to use.

Of the respondents who are aware of the materials, Fact sheets are the most commonly used, followed by Checklists.

The top 3 reported materials used by each Role are:

Management, Coordinator	Administration, Scheduler
#1 – Fact sheet(s) - 64%	#1 – Fact sheet(s) - 71%
#2 – Quick guide(s) - 61%	#2 – Video(s) - 71%
#3 – Checklist(s) - 59%	#3 – Worked example(s) - 70%
Driver – Sub-contractor	**Driver – Employed by a business**
#1 – Checklist(s) - 72%	#1 – Checklist(s) - 56%
#2 – Fact sheet(s) - 67%	#2 – Template(s) - 55%
#3 – Template(s) - 64%	#3 – Worked example(s) - 45%

Note: Respondent numbers are small for some Roles and should be treated as indicative only and interpreted with caution.

Note: 'Loader' & 'Driver - Own and drive own vehicle' had <5 respondents and are not shown.

Usefulness (by business size of 2 to 10 vehicles)

Overall, at least **97%** or more respondents who used the SMS Guidance materials found them to be useful to their role.

This highlights that while there is not a very high uptake of some of the materials by particular Roles, those using them are finding them useful.

For example, Template(s) are the least used SMS Material (53%), though almost all respondents (97%) who have used them, say they are useful.

Similarly, only half of respondents (57%) report they use Video(s), but 99% of them feel they are useful.

Note: A full breakdown of use and usefulness by Role (for business size of 2 to 10 vehicles) is included in the appendix of this report.

Why some respondents found the materials to be 'not useful'

The very small % of respondents who did not find the SMS materials useful felt that the materials were cumbersome, not practical/realistic and containing content that is not applicable to their individual circumstances.

Note: Comments from all business sizes around why respondents did not find the materials useful is included in the appendix of this report.

Success. Mapped.
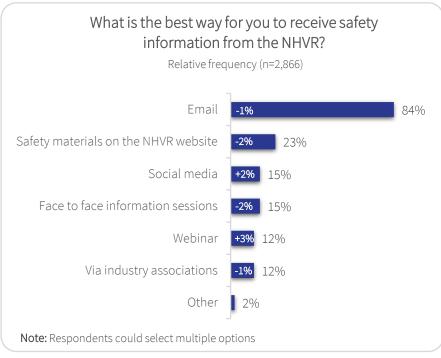
Target safety initiatives

Preferred method of contact

Overview of all respondents

Email continues to be preferred for NHVR to communicate safety information to respondents.

The website is the next most popular method of communication, with one in five (23%) respondents stating this.

Social Media and Face to face information sessions are the third best method of contact.

What is the best way for you to receive safety information from the NHVR?

Relative frequency (n=2,866)

Method	Relative	%
Email	-1%	84%
Safety materials on the NHVR website	-2%	23%
Social media	+2%	15%
Face to face information sessions	-2%	15%
Webinar	+3%	12%
Via industry associations	-1%	12%
Other		2%

Note: Respondents could select multiple options

% of respondents (relative frequency shown)

Differences by role

There is some variation by role regarding preferred method of contact with social media rating higher among Loaders and Drivers. The top 3 for each role being:

Management, Coordinator, Administration and **Scheduler**

#1 – Email

#2 – Safety materials on the NHVR website

#3 – Face to face information sessions / Webinars

Loader, Driver sub-contract for a business and **Owner driver**

#1 – Email

#2 – Safety materials on the NHVR website

#3 – Social media

Driver employed by a business

#1 – Email

#2 – Social media

#3 – Face to face information sessions

'Other' preferred methods

Some respondents suggest the following methods to receive safety information from the NHVR:

- Consultancies
- Physical post mail
- Over the phone
- NHVR Podcasts and Facebook posts

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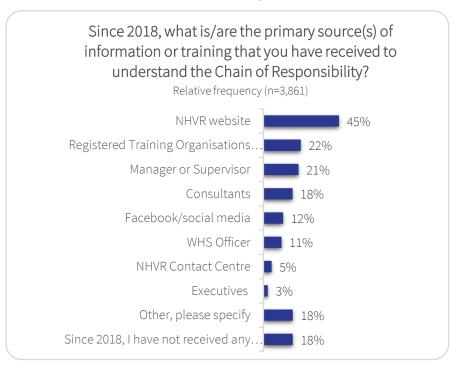
Target safety initiatives

Chain of Responsibility (CoR)

Overview of all respondents

The NHVR Website is the primary source of CoR information and training for respondents.

Registered training organisations (RTOs) and Managers/Supervisors are the next primary sources.

Almost one in five (18%) respondents indicate that they have not received any CoR information or training since 2018.

Since 2018, what is/are the primary source(s) of information or training that you have received to understand the Chain of Responsibility?

Relative frequency (n=3,861)

Source	%
NHVR website	45%
Registered Training Organisations…	22%
Manager or Supervisor	21%
Consultants	18%
Facebook/social media	12%
WHS Officer	11%
NHVR Contact Centre	5%
Executives	3%
Other, please specify	18%
Since 2018, I have not received any…	18%

% of respondents (relative frequency shown)

Note: Respondents could select multiple options

Differences by role

Respondents' primary sources of information vary by role. The top 3 for each role are shown below:

Management, Coordinator, Administration and **Scheduler**
#1 – NHVR Website
#2 – Registered Training Organisations (RTOs)
#3 – Consultants

Loader, Driver sub-contract for a business and **Owner driver**
#1 – NHVR Website
#2 – Manager or Supervisor
#3 – Facebook / Social Media

Driver employed by a business
#1 – Manager or Supervisor
#2 – NHVR Website
#3 – Registered Training Organisations (RTOs)

Note: Drivers and Loaders report a high number of respondents who have not received any CoR information or training (26%)

'Other' preferred methods

Some respondents suggest the following 'other' methods to receive CoR information:

- Own research
- VicRoads
- Industry Associations/Organisations
- Company internal training
- Trucksafe
- NatRoad
- Word of Mouth

Success. Mapped.

06
Survey significance and future improvements

Survey significance and future improvements

Survey significance

Introduction

This section provides an overview of the statistical power of the survey results. With high confidence interval and small margin of error, the present survey generates reliable and valid findings that enable the formulation of accurate conclusions.

Historical changes

Based on feedback from the NHVR's internal Subject Matter Experts in 2018, a deliberate judgement was made by the NHVR to improve on the survey in order to draw more accurate conclusions in 2020.

At the request of the NHVR, a number of changes were made by Insync for the 2020 survey. This included a change in rating scale and wording of questions in order to improve on the simplicity of answering as described earlier in this report.

While this meant 2018-2020 comparisons were indicative only, the 2020-2022 results can be directly compared as each survey utilised the same questions and scales.

Reliability of results

The overall sample size of 5,750 responses captured in the 2022 NHVR Industry Safety Survey is almost double the number of respondents in 2020 and provides a reliable set of results.

The majority of respondents (90%) are those from the distribution list compiled by the NHVR who were sent a direct email inviting them to participate. An overall 9% response rate of those invited by email, gives a high confidence interval and small margin of error.

As in 2020, demographic proportions of key respondents are still mostly representative of the dispersion of workers in the heavy vehicle industry. For example, respondents were more likely to be in Victoria, New South Wales and Queensland, which closely resembles the heavy vehicle registration demographic profiles in Australia.

The majority of respondents are also from NHVAS accredited businesses, which allows for reliable conclusions to be made.

However, it is important to note that there are demographic cohorts which are not as reliable as the sample size is smaller, and results should be treated as indicative only and interpreted with caution. Example cohorts where sample sizes were smaller include some of the accreditation schemes, such as CraneSafe as well as some of the Smaller States/Territories and those who reported having used the SMS Materials.

Question consistency and reliability analysis

In 2020, Insync conducted an internal consistency reliability analysis to determine how well the survey questions correlate and produce consistent and reliable results for its related factors (e.g., whether all safety risk management questions assess safety risk management).

Results of the analysis show very good internal consistency, indicating the questions are well structured and generate reliable results, further increasing our confidence in drawing accurate conclusions through using these questions again in 2022.

Success. Mapped.

Survey significance and future improvements

Future improvements

Introduction

The NHVR intends to conduct the industry Safety Survey as a biennial survey to assess change in the way the heavy vehicle industry manages its safety responsibilities. This section identifies areas for improvement to be considered in design and delivery of the 2022 survey.

Participant recruitment

Participant recruitment has increased in each Safety Survey since its inception in 2018, though there are opportunities to reach an even greater and more focussed sample size in the future.

It is important that the distribution list and stakeholder contact information remains current and up to date to allow for an increased reach. For example, the 2020 distribution list contained 3,391 stakeholders whose email addresses were invalid and therefore their direct survey invitations were unable to be delivered.

The relevance of the audience being reached is also important in ensuring the responses captured are providing useful information. In 2022, Insync received some emails from these participants expressing their inability to complete the survey as it did not apply to them.

It should be noted that learnings taken from the 2020 Safety Survey were implemented in the 2022 Participant List, and significant efforts were made to exclude groups which could not respond (including motor home/caravan drivers). The demographic question for industry was also revised to include both main and secondary industries for respondents.

NHVR may also be consider further marketing the survey and growing awareness of the study by implementing pre-survey communications across its various channels. This can assist in securing a stronger response rate, thus helping to further assess and validate our regulatory impact on the heavy vehicle industry.

The option of including an incentive or a prize draw can also be considered to boost response rates among stakeholders.

Survey design

To ensure the measuring and provision of necessary information/results for the NHVR to form more accurate conclusions, the survey design can be further streamlined.

Further question refinements can be made by reviewing and identifying any gaps in the data collected. A formal questionnaire testing regime is recommended to assess survey interpretation in real-time, to allow for wording improvements and structural revisions.

There are also some options to consider that may help minimise survey fatigue:

- Validity testing and identifying any redundant items for removal
- Collection of prepopulated data to reduce the number of demographic questions at the beginning of the survey

Success. Mapped.

Survey significance and future improvements

Future improvements (continued)

Deeper insight and detail via Qualitative Research

The 2022 survey continues to include minimal qualitative elements and capturing more open-ended responses in future would add greater insight and depth to the survey. However, this may be best conducted in a separate Qualitative study so as to keep the Online Survey as streamlined as possible.

NHVR may consider conducting focus groups and in-depth interviews with key stakeholders. These can be used to openly discuss their safety practices and concerns, based on their demographic characteristics and perspectives.

Success. Mapped.

Appendix

Respondent demographic profile in full

Which of the following best describes your role?		
Management	2457	43%
Driver	2375	41%
Administration	598	10%
Coordinator	193	3%
Scheduler	68	1%
Loader	22	0.4%

Driver – which of the following best describes you?		
Own and drive your own vehicle	1672	29%
Employed by a business	477	8%
Sub-contract for a business	225	4%

In which State/Territory are you/your business based?		
VIC	2839	49%
NSW	1141	20%
QLD	843	15%
SA	414	7%
Multiple/Nationally	271	5%
TAS	91	2%
WA	68	1%
ACT	38	1%
NT	8	0.1%

Approximately how many people (head count) work in your business?		
2 to 10	3426	60%
11 to 20	524	9%
21 to 50	516	9%
51 to 100	349	6%
101 to 200	199	3%
201 to 300	88	2%
301 to 400	44	1%
401 to 500	29	1%
500+	194	3%
Unsure	205	4%

Where do you mainly transport goods to?		
Local	3348	58%
Interstate	1211	21%
Intrastate	1154	20%

Which of the following best describes the industry sector in which you/your business operates?		
General Freight	1159	20%
Primary production/farming	1146	20%
Construction/landscape products	1041	18%
*Other	707	12%
Livestock	205	4%
Oversize	196	3%
Car/equipment carrier	185	3%
Mining	173	3%
Dangerous Goods	154	3%
Buses	142	2%
Containers	135	2%
Waste	111	2%
Logging	99	2%
Crane	93	2%
Steel	91	2%
Government incl. local	76	1%

*% of **ALL** respondents are shown within each table*

Success. Mapped.

Respondent demographic profile in full

Are any of your vehicles in a Performance Based Standards Scheme?

Yes	1081	19%
No	3602	63%
Unsure	1030	18%

Is your business in an accreditation scheme?

Yes	2155	37%
No	2735	48%
Unsure	823	14%

If Yes to Accreditation: Which scheme is your business accredited in?

NHVAS	2033	35%
TruckSafe	184	3%
WAHVA	277	5%
CraneSafe	29	0.5%

If accredited in NHVAS: Which NHVAS modules is your business accredited for?

Mass	1725	30%
Maintenance	1308	23%
Fatigue	1154	20%

Approximately, how long have you been working in the heavy vehicle industry?

Less than a year	163	3%
1-5 years	798	14%
6-9 years	498	9%
10-14 years	641	11%
15-19 years	542	9%
20+ years	2928	51%

Approximately how many heavy vehicles does your business operate? (incl. trucks & trailers)

1	578	10%
2 to 10	1719	30%
11 to 20	490	9%
21 to 50	478	8%
51 to 100	252	4%
101 to 200	143	2%
200+	222	4%
Unsure	84	1%

Note: the above question was NOT asked of Drivers who own and drive their own vehicle

Approximately, how many heavy vehicles do you own or operate?

None	13	0.2%
1	1114	19%
2 to 5	649	11%
6 to 10	39	0.7%
11 to 20	12	0.2%
21 to 50	1	<0.1%
50 +	1	<0.1%
Unsure	4	0.1%

Note: the above question was only asked of Drivers who subcontract for a business and Drivers who own and drive their own vehicle

*% of **ALL** respondents are shown within each table*

Success. Mapped.

Definition of a basic SMS

Survey questions measured

Outline

Business Management

- Management are visible in the workplace and demonstrate an interest in safety
- Safety is an important part of all business activity and decision making
- I feel safe at work

Safety Risk Management

- Incidents are reported
- Risks are assessed
- Risk controls are put into place to manage risks
- Risk controls are communicated to staff

Safety Assurance

- Employees are able to say no when asked to undertake an activity if they believe it is unsafe
- There is a process in place to investigate safety issues

Safety Promotion and Training

- Safety related information is communicated to all staff
- Relevant safety training is provided on an ongoing basis

How often do you or your drivers

- Use a safe driving plan
- Inspect the vehicle for potential safety defects prior to operating
- Report/record incidents
- Report/record near misses
- Attend safety training related to your/their role
- Keep yourself/themselves informed of industry safety issues and information
- Have a personal health check-up

Note: the above questions were specific to the roles Management and Driver

Success. Mapped.

Assessment of industry safety capability

Implementation of a basic SMS

Implementation by business size (as defined by the number of vehicles)

Survey Topic	Survey question	1 (n=489)	2 to 10 (n=1517)	11 to 20 (n=450)	21 to 50 (n=431)	51 to 100 (n=238)	101 to 200 (n=129)	200+ (n=202)	Unsure (n=62)
Business Management	Management are visible in the workplace and demonstrate an interest in safety	87%	92%	92%	93%	87%	84%	82%	77%
	Safety is an important part of all business activity and decision making	90%	94%	92%	92%	83%	86%	84%	79%
	I feel safe at work	89%	94%	92%	93%	91%	88%	84%	79%
Safety Risk Management	Incidents are reported	88%	92%	93%	90%	90%	91%	84%	76%
	Risks are assessed	89%	91%	91%	88%	85%	87%	81%	79%
	Risk controls are put into place to manage risks	88%	92%	90%	88%	84%	84%	81%	76%
	Risk controls are communicated to staff	88%	92%	90%	86%	82%	82%	79%	72%
Safety Assurance	Employees are able to say no when asked to undertake an activity if they believe it is unsafe	91%	94%	92%	92%	89%	90%	84%	79%
	There is a process in place to investigate safety issues	83%	86%	89%	88%	87%	92%	87%	77%
Safety Promotion and Training	Safety related information is communicated to all staff	88%	91%	91%	88%	86%	87%	80%	75%
	Relevant safety training is provided on an ongoing basis	82%	80%	81%	78%	76%	77%	72%	63%

% of respondents reporting favourably – relative frequencies shown

Note: The survey questions shown pertain to the definition of a basic SMS as outlined in the appendix of this report.

Success. Mapped.

Implementation of a basic SMS

Implementation by industry sector

Survey Topic	Survey question	Buses (n=113)	Car/equipment carrier (n=112)	Construction/landscape products (n=732)	Containers (n=107)	Crane (n=74)	Dangerous Goods (n=124)	General Freight (n=772)	Government incl. local government (n=66)	Livestock (n=126)	Logging (n=76)	Mining (n=144)	Oversize (n=157)	Primary production/farming (n=786)	Steel (n=65)	Waste (n=89)	Other (n=506)
Business Management	Management are visible in the workplace and demonstrate an interest in safety	86%	88%	90%	93%	92%	90%	87%	89%	91%	95%	89%	87%	90%	92%	93%	90%
	Safety is an important part of all business activity and decision making	90%	94%	91%	89%	93%	90%	89%	89%	88%	95%	89%	84%	91%	94%	91%	93%
	I feel safe at work	90%	89%	91%	93%	93%	93%	89%	92%	88%	96%	87%	88%	94%	94%	96%	91%
Safety Risk Management	Incidents are reported	88%	89%	92%	94%	96%	93%	89%	92%	84%	99%	90%	87%	88%	94%	93%	92%
	Risks are assessed	86%	92%	92%	89%	95%	87%	85%	94%	89%	93%	87%	89%	90%	88%	92%	92%
	Risk controls are put into place to manage risks	84%	89%	91%	89%	95%	87%	85%	97%	90%	92%	89%	87%	89%	88%	93%	91%
	Risk controls are communicated to staff	84%	89%	91%	89%	92%	86%	85%	88%	85%	92%	88%	90%	89%	92%	89%	89%
Safety Assurance	Employees are able to say no when asked to undertake an activity if they believe it is unsafe	87%	93%	93%	93%	94%	93%	89%	86%	90%	95%	87%	90%	93%	92%	95%	93%
	There is a process in place to investigate safety issues	89%	83%	88%	92%	93%	89%	86%	95%	79%	96%	88%	86%	81%	89%	93%	86%
Safety Promotion and Training	Safety related information is communicated to all staff	88%	89%	90%	91%	97%	92%	87%	87%	88%	95%	88%	88%	88%	95%	91%	89%
	Relevant safety training is provided on an ongoing basis	79%	75%	82%	85%	90%	83%	76%	83%	71%	85%	81%	77%	77%	77%	85%	77%

% of respondents reporting favourably – relative frequencies shown

Note: The survey questions shown pertain to the definition of a basic SMS as outlined in the appendix of this report.

Success. Mapped.

Assessment of industry safety capability

Implementation of a basic SMS

Implementation by role

Survey Topic	Survey question	Management (n=2170)	Coordinator (n=167)	Loader (n=17)	Scheduler (n=61)	Admin. (n=509)	Driver – Emp. by business (n=405)	Driver – Sub-contractor (n=175)	Driver – Owner driver (n=545)
Business Management	Management are visible in the workplace and demonstrate an interest in safety	93%	93%	100%	97%	94%	72%	81%	85%
	Safety is an important part of all business activity and decision making	93%	94%	88%	95%	95%	70%	88%	90%
	I feel safe at work	94%	95%	100%	98%	96%	72%	82%	89%
Safety Risk Management	Incidents are reported	93%	95%	94%	92%	95%	75%	81%	88%
	Risks are assessed	93%	93%	82%	92%	94%	67%	79%	91%
	Risk controls are put into place to manage risks	93%	94%	76%	90%	93%	66%	77%	89%
	Risk controls are communicated to staff	93%	90%	76%	87%	93%	64%	78%	89%
Safety Assurance	Employees are able to say no when asked to undertake an activity if they believe it is unsafe	95%	96%	93%	89%	94%	72%	80%	92%
	There is a process in place to investigate safety issues	90%	93%	80%	91%	92%	63%	71%	84%
Safety Promotion and Training	Safety related information is communicated to all staff	93%	90%	80%	91%	94%	65%	79%	89%
	Relevant safety training is provided on an ongoing basis	83%	78%	80%	87%	85%	50%	67%	80%

% of respondents reporting favourably – relative frequencies shown

Note: The survey questions shown pertain to the definition of a basic SMS as outlined in the appendix of this report.

Success. Mapped.

Survey differences from previous surveys

Comparison between rating scales

Agreement scales

2022 & 2020		2018	
1	Strongly disagree	1	Strongly agree
2	Disagree	2	Disagree
3	Neither agree nor disagree	3	Slightly disagree
4	Agree	4	Neither agree nor disagree
5	Strongly Agree	5	Slightly agree
		6	Agree
		7	Strongly Agree
		8	Unsure

Frequency scales

2022 & 2020		2018 (varying scales dependent on question set)							
1	Never	1	Never	1	Daily	1	At least monthly
2	Rarely	2	Rarely	2	Weekly	2	At least quarterly
3	Sometimes	3	Occasionally	3	At least monthly	3	Every six months
4	Often	4	Often	4	At least quarterly	4	Every year
5	Always	5	Always	5	Every six months	5	Never
		6	Not applicable	6	Every year	6	Not applicable
				7	Irregularly/ no set time period		
				8	Not applicable/ not applied in practice		

Success. Mapped.

Assessment of industry safety capability

Comparison of industry safety capability 2018 - 2020

Results comparison (indicative only)

2022 & 2020 Question	2022	2020	2018 Question	%
Management are visible in the workplace and demonstrate an interest in safety	89%	87%	Management are committed to and actively support safety	88%
Incidents are reported	90%	90%	There is a formal process for reporting incidents	83%
Risks are assessed	89%	88%	Hazards are risk assessed and mitigations/controls are in place	79%
There is a process in place to investigate safety issues	86%	84%	Our business has an incident investigations process	77%
Relevant safety training is provided on an ongoing basis	79%	76%	There is recurrent role appropriate safety training provided to all staff	62%

% of respondents reporting favourably (both surveys)

Use a safe driving plan*	67%	63%	Refer to a safe driving plan*	54%
Inspect the vehicle for potential safety defects prior to operating*	96%	95%	Inspect vehicle for potential safety defects prior to operating*	97%
Report/record incidents*	83%	81%	Record and report incidents or near misses to your employer (when required)*	58%
Report/record near misses*	65%	60%	Record and report incidents or near misses to your employer (when required)*	58%
Keep yourself/themselves informed of industry safety issues and information*	70%	67%	Keep yourself informed of industry safety issues and information*	76%

% of respondents reporting often/always (both surveys)

Attend safety training related to your/their role*	54%	51%	Attend safety training related to your role*	51%
Have a personal health check-up*	68%	64%	Have a health check-up*	89%

% of respondents reporting often/always (2020) vs Monthly/Quarterly/6 monthly/Yearly (2018)

Safety practice questions only asked of Management and Drivers.   Note: The example survey questions shown pertain to the definition of a basic SMS as outlined in the appendix of this report.

Success. Mapped.

Target safety initiatives

Heavy Vehicle Safety Technology

Level of understanding by Industry Sector

There are pockets of lower understanding across all Industry Sectors, with Side and Underrun Protection being the area of lowest overall understanding. Respondents in the Containers and Waste industries have a high level of understanding regarding most Heavy Vehicle Safety Technologies.

Industry Sector	n	Stability Control Systems	Autonomous Emergency Braking (AEB) System	Adaptive Cruise Control (ACC) System	Antilock Braking System (ABS)	Lane Departure Warning System (LDWS)	Daytime Running Lamps (DRL)	Tyre Pressure Management Devices	Reversing Safety Systems	Side and rear underrun protection	Features that reduce blind spots
Buses	57	67%	72%	84%	81%	79%	82%	77%	82%	47%	68%
Car/equipment carrier	96	75%	70%	81%	93%	83%	92%	75%	86%	77%	74%
Construction/landscape products	493	67%	65%	76%	86%	77%	81%	74%	84%	62%	71%
Containers	54	81%	91%	89%	94%	87%	93%	78%	85%	87%	91%
Crane	39	56%	67%	77%	92%	74%	82%	69%	85%	54%	72%
Dangerous Goods	69	90%	77%	83%	97%	83%	96%	80%	87%	86%	83%
General Freight	433	70%	71%	78%	86%	80%	83%	79%	84%	72%	78%
Government incl. local	47	81%	81%	89%	87%	89%	87%	79%	87%	66%	79%
Livestock	87	60%	49%	62%	75%	62%	61%	61%	57%	53%	56%
Logging	50	80%	68%	76%	94%	80%	86%	84%	80%	62%	64%
Mining	73	73%	73%	79%	93%	82%	86%	71%	85%	70%	81%
Oversize	86	74%	65%	76%	91%	83%	85%	84%	87%	71%	77%
Primary production /farming	539	56%	49%	66%	81%	68%	74%	67%	71%	52%	58%
Steel	39	62%	67%	79%	95%	87%	85%	85%	87%	79%	79%
Waste	45	84%	82%	91%	98%	91%	87%	84%	91%	78%	87%
Other	290	72%	64%	74%	88%	75%	82%	76%	80%	69%	72%

Legend: % of respondents within each sector who indicated a good/very good understanding | # 40-55% | # 56-70% | # 71-85% | # 86-100%

Success. Mapped.

Target safety initiatives

Heavy Vehicle Safety Technology

Level of importance by Industry Sector

Antilock Braking System (ABS) are reported as being most respondents as important regardless of industry sector. Side and rear underrun protection are comparatively lower regarding importance. This suggests a correlation between technologies that are the most and least understood.

Industry Sector	n	Stability Control Systems	Autonomous Emergency Braking (AEB) System	Adaptive Cruise Control (ACC) System	Antilock Braking System (ABS)	Lane Departure Warning System (LDWS)	Daytime Running Lamps (DRL)	Tyre Pressure Management Devices	Reversing Safety Systems	Side and rear underrun protection	Features that reduce blind spots
Buses	57	61%	63%	40%	88%	49%	47%	47%	84%	35%	75%
Car/equipment carrier	96	55%	47%	42%	83%	47%	51%	46%	72%	36%	68%
Construction/landscape products	493	59%	48%	37%	80%	40%	42%	39%	75%	34%	73%
Containers	54	63%	63%	46%	80%	65%	46%	30%	63%	44%	69%
Crane	39	38%	36%	31%	69%	41%	36%	36%	72%	23%	72%
Dangerous Goods	69	81%	62%	49%	88%	51%	68%	42%	72%	59%	65%
General Freight	433	61%	46%	38%	77%	50%	41%	43%	61%	35%	70%
Government incl. local	47	68%	55%	43%	85%	36%	34%	36%	83%	30%	66%
Livestock	87	62%	41%	32%	64%	32%	39%	47%	60%	31%	70%
Logging	50	74%	48%	32%	82%	36%	66%	70%	48%	36%	58%
Mining	73	59%	36%	42%	75%	34%	59%	38%	63%	30%	56%
Oversize	86	47%	43%	31%	69%	38%	35%	43%	49%	26%	67%
Primary production /farming	539	52%	39%	34%	71%	31%	39%	37%	50%	24%	60%
Steel	39	54%	62%	46%	85%	54%	46%	38%	64%	41%	85%
Waste	45	73%	71%	47%	89%	60%	51%	44%	76%	49%	73%
Other	290	64%	51%	39%	79%	45%	46%	40%	66%	36%	70%

Legend: % of respondents within each sector who indicated the feature was most important when upgrading their vehicle   # 0-25%   # 26-50%   # 51-75%   # 76-100%

Success. Mapped.

Target safety initiatives

SMS Guidance Materials – all respondents

Introduction

In 2018 the NHVR released a suite of SMS guidance and education materials to assist the heavy vehicle industry to implement an SMS.

This section continues to analyse responses through 2020, now to 2022, to continue measuring industry awareness of, and usefulness of the NHVR SMS materials.

Awareness of materials (all respondents)

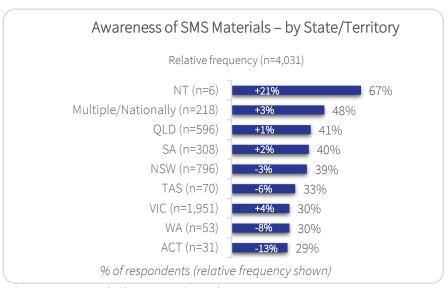**35%** of respondents report being aware of the SMS guidance materials available on the NHVR website.

Demographic differences

Results by demographic cohort help to establish a better understanding of which respondents are more likely to be aware of the materials.

Differences are seen in reported awareness across States/Territories and Industry Sectors as shown to the right.

State/Territory base (all respondents)

Those in ACT based businesses report the least awareness at 29%.

Awareness of SMS Materials – by State/Territory

Relative frequency (n=4,031)

State/Territory	Relative	Awareness
NT (n=6)	+21%	67%
Multiple/Nationally (n=218)	+3%	48%
QLD (n=596)	+1%	41%
SA (n=308)	+2%	40%
NSW (n=796)	-3%	39%
TAS (n=70)	-6%	33%
VIC (n=1,951)	+4%	30%
WA (n=53)	-8%	30%
ACT (n=31)	-13%	29%

% of respondents (relative frequency shown)

Industry Sector (all respondents)

Buses report the highest awareness (53%, [+15%]), while Primary production/farming respondents report the lowest (25%, [-2%]).

Greatest awareness		Least awareness	
Buses (n=111)	**53%**	Primary prod./farming (n=759)	**25%**
Steel (n=64)	47%	Crane (n=70)	27%
Logging (n=76)	47%	Car/equipment carrier (n=130)	28%
Government (n=61)	46%	Other (n=504)	31%
Dangerous Goods (n=117)	44%	Oversize (n=139)	32%

% of respondents who report being aware – relative frequencies shown

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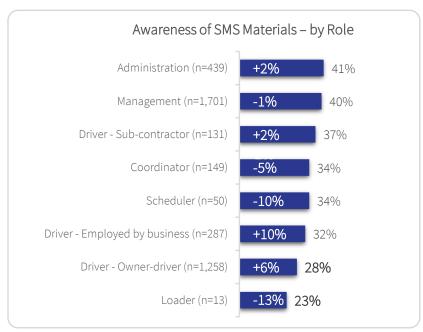
Target safety initiatives

SMS Guidance Materials

Demographic differences in awareness (continued)

Differences are also seen in reported awareness across Roles.

Role (all respondents)

Administration report the highest awareness overall at 41%.

Loaders report the lowest awareness at only 23%, which had decreased by -13% since 2020, followed by Owner-drivers at 28%, though that score has increase by +6%.

Awareness of SMS Materials – by Role

Role	Change	Awareness
Administration (n=439)	+2%	41%
Management (n=1,701)	-1%	40%
Driver - Sub-contractor (n=131)	+2%	37%
Coordinator (n=149)	-5%	34%
Scheduler (n=50)	-10%	34%
Driver - Employed by business (n=287)	+10%	32%
Driver - Owner-driver (n=1,258)	+6%	28%
Loader (n=13)	-13%	23%

% of respondents (relative frequencies shown above)

Awareness of each material - by Role (all respondents)

Overall levels of awareness varies by role, ranging from average to very high.

Checklists remain as the material with highest awareness, regardless of Role, while Videos and Worked Examples have the lowest overall awareness.

Awareness by Role	n	Checklist(s)	Template(s)	Quick guide(s)	Fact sheet(s)	Worked example(s)	Video(s)
Management	673	93% [-1%]	84% [-2%]	84% [-2%]	88% [0%]	74% [-3%]	74% [0%]
Coordinator	50	92% [-3%]	92% [+9%]	94% [+10%]	94% [+4%]	84% [+13%]	82% [+4%]
Loader	3	67% [-13%]	67% [-13%]	67% [-13%]	67% [+7%]	67% [-13%]	67% [-13%]
Scheduler	17	94% [-1%]	88% [-1%]	88% [-1%]	88% [-7%]	94% [+5%]	82% [+3%]
Administration	177	94% [0%]	89% [+1%]	88% [-3%]	92% [-3%]	77% [0%]	79% [+2%]
Driver – Employed by business	90	91% [0%]	62% [-5%]	70% [-11%]	78% [-3%]	67% [-7%]	63% [-4%]
Driver – Sub-contractor	49	94% [+2%]	82% [+12%]	82% [-2%]	86% [+2%]	88% [+7%]	84% [+20%}
Driver – Own and drive own vehicle	344	89% [-3%]	72% [+3%]	73% [-1%]	78% [0%]	69% [+2%]	67% [-1%]

% of respondents who report being aware of each material (relative frequencies shown)

Success. Mapped.

Target safety initiatives

SMS Guidance Materials

Uptake by Role (all respondents)

Uptake results by Role help to establish a better understanding of which respondents are using the materials and if there are specific materials they are more likely to use.

Of the respondents who are aware of the materials, Fact sheets and Quick guides are the most commonly used regardless of Role.

The top reported materials used by each Role are:

Management, Coordinator	Administration, Scheduler
#1 – Fact sheet(s) - 70%	#1 – Fact sheet(s) - 70%
#2 – Quick guide(s) - 62%	#2 – Worked example(s) - 61%
#3 – Checklist(s) - 59%	#3 – Checklist(s) - 60%
Driver – Sub-contractor	**Driver – Employed by a business**
#1 – Fact sheet(s) - 79%	#1 – Fact sheet(s) - 54%
#2 – Checklist(s) - 76%	#2 – Video(s) - 54%
#3 – Video(s) - 71%	#3 – Worked example(s) - 53%
Driver – Own and drive own vehicle	
#1 – Fact sheet(s) - 62%	
#2 – Quick guide(s) - 60%	
#3 – Worked example(s) - 59%	

Note: Respondent numbers are small for some Roles and should be treated as indicative only and interpreted with caution.
Multiple top materials from one role indicates an equal percentage of use.

Usefulness by Role (all respondents)

Overall, **97%** or more respondents who used the materials found them to be useful.

This highlights that while there is not a very high uptake of some of the materials by particular Roles, those using them are finding them useful.

For example, Template(s) are the least used SMS Material (52%), though almost all respondents (98%) who have used them, say they are useful.

Similarly, just over half of respondents (56%) report they use Video(s), but 97% of them feel they are useful.

Why some respondents found the materials to be 'not useful'

The very small % of respondents who did not find the SMS materials useful felt that the materials were cumbersome, not practical/realistic and containing content that is not applicable to their individual circumstances.

Note: Comments around why some respondents did not find the materials useful is included on slide 61.

Success. Mapped.

Target safety initiatives

SMS Guidance Materials

Uptake and usefulness by Role (all respondents)

In most instances, a very high proportion of those who have used the SMS Guidance Materials found them to be useful.

Use and usefulness By Role	Checklist(s)		Template(s)		Quick guide(s)		Fact sheet(s)		Worked example(s)		Video(s)	
	Used	Useful	Used	Useful	Used	Useful	Used	Useful	Used	Useful	Used	Useful
Management	60%	96%	52%	97%	63%	97%	70%	98%	55%	96%	55%	96%
	(n=627)	(n=377)	(n=563)	(n=294)	(n=563)	(n=353)	(n=588)	(n=414)	(n=498)	(n=276)	(n=499)	(n=273)
Coordinator	50%	100%	35%	100%	55%	100%	68%	97%	52%	100%	46%	100%
	(n=46)	(n=23)	(n=46)	(n=16)	(n=47)	(n=26)	(n=47)	(n=32)	(n=42)	(n=22)	(n=41)	(n=19)
Loader	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	(n=2)	(n=2)	(n=2)	(n=2)	(n=2)	(n=2)	(n=2)	(n=2)	(n=2)	(n=2)	(n=2)	(n=2)
Scheduler	56%	100%	47%	100%	47%	100%	53%	100%	38%	100%	50%	100%
	(n=16)	(n=9)	(n=15)	(n=7)	(n=15)	(n=7)	(n=15)	(n=8)	(n=16)	(n=6)	(n=14)	(n=7)
Administration	60%	97%	55%	95%	61%	97%	72%	97%	64%	95%	60%	98%
	(n=167)	(n=100)	(n=157)	(n=87)	(n=155)	(n=94)	(n=163)	(n=117)	(n=136)	(n=87)	(n=141)	(n=85)
Driver – Employed by business	50%	90%	45%	96%	48%	97%	54%	92%	53%	97%	54%	97%
	(n=82)	(n=41)	(n=55)	(n=25)	(n=62)	(n=30)	(n=69)	(n=37)	(n=60)	(n=32)	(n=56)	(n=30)
Driver – Sub-contractor	76%	97%	70%	100%	70%	96%	79%	100%	65%	100%	71%	100%
	(n=46)	(n=35)	(n=40)	(n=28)	(n=40)	(n=28)	(n=42)	(n=33)	(n=43)	(n=28)	(n=41)	(n=29)
Driver – Own and drive own vehicle	58%	97%	53%	100%	60%	98%	62%	98%	59%	99%	56%	98%
	(n=302)	(n=175)	(n=244)	(n=129)	(n=245)	(n=146)	(n=263)	(n=163)	(n=232)	(n=136)	(n=225)	(n=126)

Legend: Level of use and usefulness reported by each Role for each material

Success. Mapped.

Target safety initiatives

SMS Guidance Materials

Uptake and usefulness by Role (by business size of 2 to 10 vehicles)

In most instances, a high proportion of those who have used the materials found them to be useful.

Use and usefulness By Role	Checklist(s)		Template(s)		Quick guide(s)		Fact sheet(s)		Worked example(s)		Video(s)	
	Used	Useful	Used	Useful	Used	Useful	Used	Useful	Used	Useful	Used	Useful
Management	61%	96%	52%	97%	63%	97%	65%	98%	53%	98%	55%	99%
	(n=224)	(n=136)	(n=189)	(n=99)	(n=190)	(n=119)	(n=198)	(n=129)	(n=169)	(n=90)	(n=161)	(n=88)
Coordinator	40%	100%	25%	100%	41%	100%	56%	89%	44%	100%	23%	100%
	(n=15)	(n=6)	(n=16)	(n=4)	(n=17)	(n=7)	(n=16)	(n=9)	(n=16)	(n=7)	(n=13)	(n=3)
Scheduler	43%	100%	57%	100%	43%	100%	43%	100%	57%	100%	57%	100%
	(n=7)	(n=3)	(n=7)	(n=4)	(n=7)	(n=3)	(n=7)	(n=3)	(n=7)	(n=4)	(n=7)	(n=4)
Administration	66%	98%	58%	95%	66%	100%	74%	98%	72%	95%	73%	100%
	(n=68)	(n=45)	(n=64)	(n=37)	(n=62)	(n=41)	(n=66)	(n=49)	(n=57)	(n=41)	(n=56)	(n=41)
Driver – Employed by business	56%	100%	55%	100%	42%	100%	43%	100%	45%	100%	42%	100%
	(n=18)	(n=10)	(n=11)	(n=6)	(n=12)	(n=5)	(n=14)	(n=6)	(n=11)	(n=5)	(n=12)	(n=5)
Driver – Sub-contractor	72%	92%	64%	100%	56%	89%	67%	100%	50%	100%	57%	100%
	(n=18)	(n=13)	(n=14)	(n=9)	(n=16)	(n=9)	(n=15)	(n=10)	(n=16)	(n=8)	(n=14)	(n=8)
Driver – Own and drive own vehicle	100%	100%	50%	100%	100%	100%	100%	100%	50%	100%	50%	100%
	(n=2)	(n=2)	(n=2)	(n=1)	(n=2)	(n=2)	(n=2)	(n=2)	(n=2)	(n=1)	(n=2)	(n=1)

Legend: Level of use and usefulness reported by each Role for each material

Success. Mapped.

SMS Materials – further comments

Why the materials were found 'not useful'

In summary

The very small % of respondents who did not find the SMS materials useful felt that the materials were impractical, too complex and irrelevant to their roles/industry.

Sample comments provided by respondents

Checklist(s) (29 found not useful / 15 comments provided)

"Useful but not very Transport and Logistics friendly most templates appear to be simply grabbed from Word templates."

"Too much detail."

"Not practical."

"Majority of it is common sense to someone who wants to work and go home safely everyday."

"Same truck every day so I know exactly when my vehicle is not working correctly."

Template(s) (14 found not useful / 9 comments provided)

"It is written for trucks and I work in the bus industry."

"Too blank and generic."

"We have our own templates."

Quick guide(s) (18 found not useful / 7 comments provided)

"Some things are hard to follow and find on the system."

"To much paperwork."

"Too complex."

Fact sheet(s) (20 found not useful / 10 comments provided)

"Yes but limited supply and some outdated - not really aimed in a way that is friendly to drivers."

"We use our own specific and contractors guide lines (i.e. inductions to sites, our work place guide lines and the company's we work for inducted systems.)"

Worked example(s) (17 found not useful / 6 comments provided)

"We have modified to suit our requirements."

Video(s) (17 found not useful / 6 comments provided)

"Yes and no, they're a bit long winded and wishy washy."

"You make companies do these like Qube, through Enforceable undertakings - then want us to see them as "leaders" of the industry and promote videos they are forced to make as punishment."

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Thank you.

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