



MRS Awards 2023
Business-to-Business Research
Winner

McCann Truth Central
Prologis

**Prologis - Labour Report -
White Paper 2023**

Summary

Prologis (the world's leading logistics real estate company) partnered with McCann Truth Central to conduct pioneering research in a category that is currently deeply underserved by data. Research has given a voice to the voiceless by unearthing insights to be utilised across the logistics industry.

The industry is surrounded by myths and negative preconceptions. Our research exposed those misconceptions by engaging people from both inside and outside the industry, capturing the value it brings to wider society and uncovering key drivers for recruitment/retention.

McCann adopted an innovative mixed-method approach incorporating a proprietary 'conversational quantitative' methodology utilising extensive open text data capture and linguistic analysis. This allowed us to overcome inherent biases in closed-end quantitative research and uncover insights in an open and engaging way.

We created an innovative, data rich whitepaper which has provided Prologis with the opportunity to action change, opening doors to discussion with both government and the wider industry. The whitepaper has amplified the voices of industry workers and informed strategies for shifting public perceptions of an industry that impacts every member of British society.

Synopsis

The challenge

Prologis have captured data since 2006 on the logistics labour market and this continuous tracking data picked up the positive impact Covid-19 had on appreciation for the logistics industry and its pivotal role in keeping the nation moving. However, this recognition was short-lived. Research was needed to action change, open doors with government and wider industry influencers to impact on those perceptions, challenge them and show the value the industry brings to wider society.

The industry is surrounded by myths and negative preconceptions - our research uncovered those misconceptions by engaging people from both inside and outside the industry. This really highlights the need for a change in the way people view the industry to ensure the best talent is attracted in the future. Below is an example of just three of these myths and their realities.

Myth: Over one-third believe that the sector is 'boring' to work in.
Truth: 66% love working in logistics and warehousing.

Myth: 1 in 3 believe technology is reducing job opportunities in logistics. **Truth:** 55% of those under the age of 35 working in logistics are excited about the opportunity automation brings to the types of work on offer to them.

Myth: The logistics sector is seen as male dominated. **Truth:** As many women occupy executive and senior positions as men (6%).

These negative perceptions amongst those outside the sector can lead to a difficulty in attracting employees, whilst a lack of insight into employee needs contributes to difficulty with retention. With an increasing demand for logistics services and changing consumer expectations, the logistics sector risks losing out on potential future talent to other sectors if it doesn't fight against the stigma.

To overcome these barriers, Prologis partnered with McCann to develop a body of publicly available insights to support the industry in driving recruitment and retention. Leveraging their unique position as the leading provider to businesses across multiple categories, deliverables were produced aimed at spurring investment in workforce development by engaging change-makers across government and industry.

Research design: methodology – data collection and analysis

To address the issues at hand and achieve the client's objectives, McCann built upon Prologis' historical approach to data collection by adopting a multi-methodological strategy and leveraging a range of proprietary tools and approaches.

The first step was talking to businesses occupying spaces in Prologis buildings to create a density report – this included capturing key data points on the number of employees, the age, gender, job roles and locations.

We then did a quantitative survey amongst a sample of 350 logistics and warehousing workers. We were able to explore

themes including general profiling, employee backgrounds and experiences, motivations, drivers and barriers in the industry, inclusivity, career satisfaction and pride, future opportunities for progression, training and development, mental health in the workplace and the role of automation and technology.

McCann leveraged a proprietary approach to quantitative surveying, known internally as 'conversational quantitative'. Distinct from the conventional methods of quantitative surveys which consist of repetitive tick-boxes, this approach allows a broad array of open-ended and exploratory questions that feel conversational to the participant. This overcomes the limitations of closed-ended questioning and allows us to have a more open route to data capturing. This allows people taking part to feel that they are speaking openly as if to a 'real person', encouraging them to open-up in a conversational and richer way.

Below is an example of just a few of the open questions included:

- *You said you are proud to be working in [previous answer shown]. What is it about your role that makes you feel proud?*
- *You said you work in [previous answer shown]. What do you think could be done to attract more talent?*
- *What do you think are the advantages automation will bring?*
- *What do you think automation will allow your industry to do better in the future?*
- *What worries you when it comes to automation?*
- *What type of relevant job-related training is currently available to you?*
- *You said [previous answer shown] will provide the most career opportunities in the future – can you tell me more about this?*

The open text data is then analysed using our linguistic analysis methods including topic modelling, which was used to unearth, categorise, and quantify the key themes within responses. This allows insight unconstrained by bias and 'bad data' that results from limiting the means of expression available. *(An example of the output of this language topic modelling can be seen in Illustration 1 in the attachments.)*

Dovetailing the broader quantitative surveys of industry employees, McCann launched a shorter, 5-minute survey amongst 1,008 adult members of the UK's general working population offering national and demographic breadth. This phase focused on exploring external perceptions of the sector and the potential barriers to industry entry. This short 'mini poll' approach remained cost-effective without compromising on response richness, by again turning to linguistic analysis to unpack open-ended responses.

Once a perspective on the current state of the industry had been developed, there was a need to further explore these findings and probe areas that remained unexplored. To do so, McCann held seven 60-minute focus groups with people

from the industry across a range of organisations and range of seniority levels with the main aim of understanding the real people behind the logistics industry. What matters most to them? What makes a comfortable and inspiring work environment for logistics workers? What provisions are made for their career development? How will automation change the job roles of the future in this space? What impact does their contribution make to the local economy and the communities they live in?

After an initial consultation with Prologis, primary research findings were synthesized with insights gathered during review and analysis of third-party reports and data to couch the findings of the primary research within the context of the logistics industry, peripheral industries, and trends within wider society. McCann also integrated historical studies conducted by Prologis UK to offer a longitudinal perspective on the changing terrain of the logistics industry.

Research design: delivery

findings from each phase of the research were debriefed to senior executives at Prologis to ensure that findings and their implications were understood and importantly, informed by stakeholder experience.

In addition to producing reports tailored to an internal C-Suite audience, McCann produced a whitepaper designed to socialise the findings from the studies. *(An example of the whitepaper output can be seen in Illustration 2 in the attachments.)*

The whitepaper can be viewed in full here: <https://www.prologis.co.uk/sites/uk/files/documents/2023/05/Prologis%20Labour%20Report%202023.pdf>

As well as being published to the company's website and made freely available, McCann supported Prologis UK's Senior Vice President and Head of Capital Deployment, Robin Woodbridge, in disseminating the reports key findings to attendees of the UK's Real Estate Investment and Infrastructure Forum conference (UKREiiF) via a keynote speech.

With over 7,500 people in attendance at UKREiiF, dissemination of the programme's insight was further encouraged by distributing a QR code amongst attendees. By adopting a digital tack to distribution in favour of hard copies, the organisation was able to remain aligned with the event's focus on sustainability and increase awareness of the company's proposition. *(An example of the audience in attendance taken from UKREiiF website can be seen in Illustration 3 in the attachments.)*

Impact

Despite a full marketing push not due until September 2023, Prologis UK have already begun to receive press centred on the report – with the United Kingdom Warehousing Association, and HRNews reporting on the findings to each of their audiences.

The organisation has also reported a significant appetite for the research, particularly amongst local authorities, with senior executives finding success in driving discussion with key decision-makers in government, allowing them to bust myths

and motivate investment by evidencing the opportunity and barriers within the sector.

Why this entry is worthy of an award

this research provides a vital contribution to a fundamental part of society's infrastructure – without which the country would quite literally grind to a halt. By uncovering rich learnings about what it's like to work in logistics from the ground up and making this insight publicly available we were able to shed light for many into a category that was deeply underserved by data historically.

The whitepaper will now be utilised to effect change in an industry that offers so much future potential to our UK workforce and economy. The innovative methodology meant we were able to optimise engagement and encourage natural conversation, allowing for large-scale sharing of individual stories and experiences. This allowed us to reach real and rich insights on the true experience of working in the logistics sector. The current plan is to repeat the work every two years to build momentum, continue to support development of the industry and act as a reliable continuous source of industry data moving forwards.

20% "I ALWAYS KNEW..."

I always wanted to drive big vehicles when I was younger, so I took my PSV test when I was 20.
- Male, 31, Warehousing

Have MSc in logistics
- Male, 40, Logistics

15% "...A NEEDED CHANGE"

I wanted to change from office work and work outdoors.
- 41, Male, Warehousing

I broke up with my ex wife and chose a career on the road away from home
- 33, Female, Warehousing

12% "A GOOD FIT"

I enjoy the hands on experience and enjoy the quality and testing projects.
- Male, 51, Manufacturing

I like to pack products and send them to make customers happy
- 35, Female, Manufacturing

12% "IT WAS A BLESSING IN DISGUISE"

I was made redundant at my previous job and saw a advertisement and ever since I've enjoyed working there.
- Female, 27, Warehousing

THE PULL INTO THE CATEGORY IS OFTEN INTENTIONAL AND POSITIVE

15% "I WAS INFLUENCED"

My father and uncle were in the transport industry as I grew up.
- Male, 41, Warehousing

The company I work for was recommended to me by a trusted friend.
- Female, 63, Logistics

10% "FOR THE SALARY & BENEFITS"

I went into logistics as I moved back to my home town and I found it easiest getting a job in logistics and found the pay very good for the work load we do.
- Male, 24, Logistics

9% "EASY TO GET INTO"

When I left school it was the easiest job to get
- Male, 66, Warehousing

I needed a job and this one needed no qualification
- Female, 47, Warehousing

8% "PURELY BY CHANCE"

I fell into logistics by accident. Things at the job I had originally applied to did not work out. They said I was welcome to try a different job in the factory. So I decided to give it a go and have been there ever since.
- Female, 48, Manufacturing

TYPES OF JOBS

Changing Nature of Employment 2006 - 2022 by Worker Density

Year	Worker Density
2006	457
2010	483
2014	484
2018	453
2022	403

Changed figures are based on survey responses from logistics companies with varying building sizes and employee counts, scaled to maintain a consistent employee-to-sq-ft ratio for a specific sq. footage (i.e., 500,000 sq. ft.)

PART-TIME VS. FULL-TIME EMPLOYMENT

The logistics sector has demonstrated a relatively stable balance between full-time and part-time contracted employees.

In 2010, 88% of the workforce was employed on a full-time basis, increasing to 89% in 2014 (Prologis UK, 2023). Although the percentage of full-time employees decreased to 78% in 2018, there has been a significant shift towards full-time contracts in 2022 (Prologis UK, 2023).

Currently, 91% of the logistics workforce employed across Prologis UK sites that responded have full-time contracts, with only 9% employed with part-time contracts, exceeding the national average for full-time employment amongst working-aged people, which stands at 77%. This demonstrates the sector's commitment to providing secure employment opportunities and stable working conditions, contributing to the overall stability of the national economy (Prologis UK, 2023).

Changing Nature of Employment 2006 - 2022 by Job Type

The density of workers within a typical logistics building increased between 2006 to 2014, but this has recently begun to decline. Contributing to this decline may be the rise in the popularity and use of automation and robotics throughout the sector over the last 10 years. In addition, despite an overall decrease in the number of employees, the diversity and range of jobs has generally continued to grow.

SOME OF OUR UKREiif 2023 ATTENDEES AND SUPPORTERS:

