



Take a break

Road users' views about roadside facilities

July 2016



Foreword

For road users making longer journeys, stopping at services is an integral part of the journey experience. This can be for a short toilet and fuel stop, or parking for longer to rest and eat. For lorry and coach drivers services are an essential part of doing their job, given legal requirements to take regular rest breaks and, for some, the need to stay overnight.

In our *Road user needs and experiences* research¹, we found that some users had concerns about the facilities available at service areas. Transport Focus wanted to follow this up and research users' views about roadside facilities on England's motorways and major 'A' roads.

Of course, it is worth noting that services are operated by private companies. In order to be signed from the motorway they have to provide a minimum level of facilities. They are otherwise free to provide the facilities, shops, food and drink outlets they think will meet the needs of their customers. They can set prices as they see fit.

We found that most road users are broadly satisfied with services on motorways. People's needs are largely functional. They want to use the toilet and buy a coffee, sandwich and fuel. These functional needs are generally met. Road users told us that you know what you'll get at a motorway service area and it's usually provided. That doesn't mean everything is perfect, with concern about cleanliness, particularly of toilets, and the cost of food, drink and fuel.

We found lorry drivers to be less happy with roadside facilities, whether on a motorway or a major 'A' road. They told us their needs are often not fully met. They feel there are too few spaces for heavy goods vehicles (HGVs) to park at the locations and times they need to stop. Even when there is space to park, what is provided does not always help drivers rest properly before getting back behind the wheel. Many lorry drivers and organisations in the freight sector tended to have the view 'The law says I must stop and rest, but nobody helps me do it.'

We found that road users' views of services on

major 'A' roads, known as trunk roads, were less favourable. People talked about inconsistency, poor quality and low confidence that even their basic needs would be met. This extended to lack of clarity about where those services are, what time they are open and what facilities are available. Whereas on a motorway road users said they know what they'll get and are basically happy with it, this wasn't the case on major 'A' roads.

The main conclusions Transport Focus draws from this research are that:

- Highways England should explicitly acknowledge that roadside facilities are an integral part of their customers' experience. It should develop a strategy for the company to play an active role in facilitating high-quality provision to meet their needs, whether on the motorways or major 'A' roads.
- Highways England should develop a strategy to ensure there is sufficient capacity for lorries to park in the right places and with facilities that meet drivers' needs. It will need to work with the freight industry, government, local authorities and others to do this.
- Operators of service areas should seek to meet road users' challenge that they want greater consistency in cleanliness, especially of toilets.

I hope this insight into road users' views will be helpful in improving the experience for road users stopping at services. It is clearly in the interests of those who operate services that their facilities meet road users' needs. But it is also in Highways England's interest not only to improve its customers' journey experience, but to help ensure people don't drive tired, don't stop

unnecessarily on the hard shoulder and don't run out of fuel. Quite apart from causing delays, there are safety reasons as these are often contributory factors in accidents that cause injury or worse.

Transport Focus will use the research as we explore with Highways England, government and those who operate services how the issues highlighted can be addressed.

Finally, we are considering whether to follow this research with a survey of road users' satisfaction with motorway service areas on an ongoing, quantitative

basis. This would enable operators to benchmark customer experience and measure improvement over time. It would complement the Strategic Roads User Survey which will launch in 2017.



Jeff Halliwell
Chair
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Summary of research findings

Most road users' needs from roadside facilities on the motorways and major 'A' roads managed by Highways England are largely functional. For example, to use the toilet and buy a coffee or a snack. This means roadside facilities are primarily judged by users on the basis of whether these basic needs have been met successfully.

Many road users, especially those driving for leisure or business purposes, for example to visit family or to attend a meeting, are broadly satisfied with motorway service areas (MSAs).

Professional drivers, those who drive for a living, tend to make more frequent use of roadside facilities. They have more complex needs and are less satisfied with MSAs. Lorry drivers especially generally prefer to stop at dedicated truck stops where possible.

Services on motorways meet most road users' basic needs, both in terms of the range and quality of facilities available and their frequency and location on the motorway network. What road users value about MSAs is their consistency and reliability. They have confidence, even when travelling on an unfamiliar route, that MSAs will meet their essential needs:

toilets, food and drink. The main concerns expressed were inconsistent cleanliness, especially of toilets, and the cost of food, drink and fuel.

In contrast, services on trunk roads (major 'A' roads managed by Highways England) are perceived to lack both consistency and quality. Road users lack confidence that essential facilities, even basics such as toilets, will be available. Signage often offers little reassurance.

Roadside facilities are of greater significance to lorry drivers because they are legally required to stop driving after a certain number of hours. Their compliance with the law is monitored and when their driving time is up they have to stop to rest or face prosecution. This means they try to plan their stops and are often forced to adjust their plan according to traffic, lack of parking spaces or hold ups on the road.

The research identified a key concern with inadequate parking capacity for lorries which can lead to drivers stopping, even overnight, in locations with few or no facilities such as laybys, retail and business parks or even slip roads, the hard shoulder and other prohibited areas.

Motorway service areas

leisure, business and professional users

Most of the discussion with road users in the research focused on motorway service areas. This is partly a reflection of the frequency of use of MSAs compared with trunk road facilities, but also that the MSA 'offer' is coherent and consistent. This characteristic means that most road users' expectations are already set before they stop.

Overall, MSAs meet the needs of most users. They are typically satisfied with the number and frequency of MSAs. Feedback is generally positive on the quality of facilities and the high street brands available.

Leisure users in particular commented on recent investment in MSA premises and welcomed improvements made by operators. Gloucester services on the M5 were highlighted by some users as an example of a facility with a distinctive 'offer', such as local produce and 'green' outside space.



There is a clear difference between the views of professional users, where driving is integral to their job, and those making journeys for leisure or on business. Leisure users recognise that prices for fuel, food and drink are higher than elsewhere. But some are more accepting as it is a once-in-a-while purchase – even seen as an occasional 'treat' by some. In contrast, professional drivers are often frequent users and the price of fuel, food and drink at MSAs is a real concern. They perceive that they have no choice but to pay expensive prices, with the impact felt directly in their pocket or sometimes by the business they own.

Professional users still find MSAs adequate for quick, basic stops where they use the toilet and 'grab and go' food or coffee. But they are more inclined than others to seek out lower-cost options off the motorway at retail parks and supermarkets.

The most significant improvement users sought was in cleanliness, particularly of toilets. Ensuring that toilets are kept consistently clean is a priority for improvement for all user types. All users, especially professional users, would also view better value food, drink and fuel as welcome improvements.

Other improvements suggested included:

- more green spaces and attractive outdoor areas
- clearer signage of caravan parking
- more comfortable indoor seating
- greater choice of healthy hot meals
- improved Wi-Fi.

"The fuel is expensive, I will only get fuel at a service station if it's an absolute emergency."

"It's good to have brands that you recognise. Ones that are credible and good quality and consistent across the country."

Motorway service areas

lorry drivers

Lorry drivers report that when making short, functional stops MSAs meet their basic needs: toilet, fuel and a hot drink or quick snack. However, MSAs rarely meet all their needs and lorry drivers perceive that MSAs are 'not for them'. They report not feeling welcome or that their needs are not understood. Lorry drivers' perceptions of MSAs depend on the complexity of their needs, with those staying overnight feeling the most negative about their experiences.

Parking is a concern for all lorry drivers. Drivers report lack of capacity in some locations and availability of spaces is variable, especially later in the day. For those drivers who require long-stay parking at MSAs this is seen as expensive. Some drivers resort to laybys and industrial or retail parks to avoid the cost. Many drivers are concerned about the lack of security for lorries at MSAs. Some report experiencing thefts from their vehicles and point to the lack of floodlights, security fencing and CCTV. A further complaint is that the parking area is often noisy, with noise from engines and refrigeration units making it difficult to get good quality rest. They also perceive 'their' parking area to often be physically remote from the main facilities and that spaces can be small, making parking difficult.

Some drivers appreciate the meal options available, for example fast food outlets such as McDonald's or Burger King, but for many the lack of 'home cooked' meals is a concern. This is not just about wanting more than only fast food options, though these are felt to be unhealthy and become repetitive

for those eating at MSAs regularly. It is as much about the ambience and overall dining experience. Drivers also report that meal vouchers offered in return for purchasing long-stay parking are often insufficient to cover reasonable costs.

Lorry drivers making overnight stops often find this a frustrating experience. The lack of a dedicated driver lounge to give them an opportunity to socialise and relax is seen as a problem. Another frequently raised concern is shower facilities, which may be too few in number and are sometimes not kept clean.



"The car parks are getting bigger for cars, but the lorry spaces are getting smaller."

"They don't give lorry drivers what they need, we're not made to feel welcome."

Truck stops lorry drivers

"The staff are happier and friendly, it's a much more personal experience."

"Truck stops become full, laybys become full, and then it becomes a real big problem of like where can you safely park your vehicle?"

Many lorry drivers compare MSAs with truck stops specifically designed for lorries and their drivers.

Truck stops are considered variable in terms of quality and range of facilities available. However, they are generally perceived to be better for lorry drivers than MSAs. Truck stops often have relatively inexpensive 'sit-down' restaurants where they can get 'home cooked' meals. Some also have bar and lounge areas.

These facilities don't just address their functional needs. They also offer drivers the opportunity to relax and socialise with their fellow drivers rather than be confined to their cab.

Parking at truck stops is perceived to be better value and quieter than at MSAs and sometimes more secure, with fencing and CCTV or other measures to prevent theft. The parking surface can be very rough, but the greatest concern is the availability of and capacity at these facilities. Drivers report that there often aren't truck stops located where they need them. Even where they exist availability of spaces later in the day can be a problem.



Services on major 'A' roads

Road users found it difficult to define services on major 'A' roads. They often spoke about petrol stations and other retail establishments on or next to the road, as well as facilities that are signed from it as 'services'. This reflects the wider variety of stopping options road users can choose from on these routes. It also shows that users find that, on the whole, these services lack a coherent and consistent identity.

Road users considered services on trunk roads to be unpredictable and variable in terms of opening hours, cleanliness and basic amenities. Some services offer a range of facilities comparable with MSAs, while others are felt to be very limited. The research suggests that some drivers, including women travelling alone, feel less confident about their personal security at trunk road services than when stopping at an MSA. This means that in contrast to MSAs, road users perceive trunk road facilities to lack reliability, consistency and the assurance that essential facilities such as toilets will be available.

Road users highlighted signage as an area for improvement for services on trunk roads. They pointed out that signs were often not very informative, variable in level of detail and unclear. For example they appear to be dark, faded, or small. Again, the overall criticism is of lack of consistency; while some signs are informative, others just say 'services'. This does not provide road users with the necessary confidence that the core amenities they require will be provided. It was suggested that, as a minimum, signs should make clear if a toilet is available.

"They're generally not as well lit or signed. The toilets are awful and safety at night is a concern..."

"It's a bit run down, the toilets aren't the nicest of toilets but when you're desperate you just go don't you? I wouldn't actually stop here again."



Laybys on major 'A' roads

Most road users rarely use laybys on major 'A' roads. If they do stop it is typically unplanned, for example to make a phone call. Users who stop rarely leave their vehicle, except perhaps to make a purchase from a snack van. In fact most road users don't really consider laybys to be roadside facilities at all, in the way they understand MSAs or other services. This is because they lack the basic amenities they look for when stopping. They tend to think that laybys are 'just for lorry drivers'.

Some lorry drivers use laybys frequently, either to take short rests, or in some cases to spend the night. The lack of facilities presents a more significant problem for these drivers, especially the lack of toilets. Lorry drivers report having no choice but to relieve themselves outside. While many of the drivers we spoke to were used to this, when probed in the focus groups they thought having to stop where there are no toilets is not really acceptable.

All types of road users share safety concerns about stopping in laybys. This is particularly the case for leisure users travelling with children or pets, or women travelling alone. The main reason stopping is perceived as dangerous is their proximity to

fast-moving traffic. Lorry drivers point out very short slip roads also increase the risk of a collision.

In some parts of the road network lorry drivers rely on laybys to take their mandatory rests, but they recognise there can be safety reasons to support their removal. They do not necessarily object to laybys being closed, but lack of parking capacity overall is a key concern. Removal is acceptable only if the capacity is replaced elsewhere.

We asked all road users to consider whether they would stop at 'enhanced laybys' that might be separated from the road and offer more facilities. Some users occasionally mentioned French 'Aires de Service' and felt that these would provide a safer alternative to traditional laybys. To be useful, however, users said these facilities would require separation from the road, picnic benches, bins and clean toilets. They were sceptical that these facilities would be kept clean and well maintained.

"Sometimes we'll stop to read the map but it has to be a pretty desperate stop."

"You shouldn't have to do your necessities on the side of the road in laybys, they should have toilets."





Views of organisations in the freight sector

The organisations in the freight sector we talked to about roadside facilities provided similar feedback to the lorry drivers and supported their concerns. However, they added that issues with the quality and availability of roadside facilities, and in particular the lack of capacity for lorry parking, are impacting the industry more widely. They report that the requirement to take regular rest breaks, monitored by tachograph, combined with the lack of capacity at suitable roadside facilities, contributes to driver recruitment and retention challenges. These stakeholders' top priority is improving capacity for lorry drivers to take their rest breaks, especially on motorways.

The stakeholders also raised concerns that MSAs are not designed for lorry drivers, pointing to expensive parking, food and fuel, the fast food, poor overnight facilities such as showers and a lack of security. Stakeholders also perceive that truck stops are better than MSAs overall, with lower prices and facilities tailored to lorry drivers. However, they say that truck stops are too few in number. This often requires significant detours to reach them and they lack capacity as parking spaces tend to fill up early. Truck stops are perceived to be variable in quality, which they suggest may be improved by creating minimum standards. Laybys provide an alternative and make up for lack of capacity elsewhere. Fewer laybys are now available and they say replacement capacity is not being provided.

The stakeholders perceive that one of the most significant obstacles to meeting the demand for parking capacity is obtaining planning permission and funding for new facilities.

They report it can take up to 10 years for a truck stop to be built and that many developers give up. There is a perception that there is little help or support from government or Highways England. They suggest that Highways England should work more collaboratively with planning authorities to speed up the process for agreeing to new lorry parking facilities.

"Drivers are not offered the facilities they demand or indeed deserve. This is one of many reasons why the industry suffers from a shortage. Why would anyone choose a career that in a number of cases treats them as a second-class citizen?"

"It's fine if they want to close laybys for security reasons, but where are the drivers supposed to go if there is no room anywhere else?"

Recommendations

In light of these findings, Transport Focus makes the following recommendations

Services are part of the road user experience

Transport Focus recommends that Highways England explicitly acknowledges that roadside facilities are an integral part of its customers' experience, and that it should develop a strategy for the company to play an active role in facilitating high-quality provision to meet their needs, whether on the motorways or major 'A' roads.

Roadside facilities, from MSAs to laybys, make up part of the experience of using Highways England's network for many road users. While Highways England does not operate MSAs and trunk road services, it should seek to ensure that roadside facilities are meeting the needs of its customers. It is in the company's interest not only to improve its customers' journey experience, but to help ensure people don't drive tired, don't stop unnecessarily on the hard shoulder and don't run out of fuel. Quite apart from causing delays, these are often contributory factors in accidents that cause injury or worse.

The research identified that users tend to be much less satisfied with services on trunk roads than with MSAs. A key reason is the real or perceived lack of consistency in the quality of services, and the consequent lack of confidence road users have that services on trunk roads will meet their needs. We recognise that there will continue to be differences in the size, style and range of facilities available at trunk road services. However, Highways England should work with the operators of services to seek improvement in the overall quality and consistency of the offer to road users.

Lorry parking capacity and the needs of drivers

Transport Focus recommends that Highways England develops a strategy, working with the freight industry, government, local authorities and others, to ensure there is sufficient capacity for lorries to park in the right places and with facilities that meet drivers' needs.

It is clear from the research that lorry drivers and the freight industry are concerned about roadside facilities and, in particular, lack of capacity for lorry parking. Lorry drivers are required to take regular rests by law for safety reasons. They report that MSAs do not understand and cater to their needs and parking capacity at suitable locations is inadequate. This is leading to drivers having to stop, sometimes overnight, in locations such as laybys that lack even a toilet; the most basic of facilities. They see nobody taking responsibility for ensuring adequate provision of suitable places to stop with the facilities they need to rest before continuing to drive. One of the primary roles of the Strategic Road Network is to facilitate the movement of goods around the country. Highways England should lead efforts to ensure that roadside facilities are meeting the needs of lorry drivers and the freight industry.

Signing of trunk road services

Transport Focus recommends that Highways England develops a strategy for signing services on trunk roads with the objective of providing greater assurance to road users about the facilities available.

The research shows that a blue motorway sign reading simply 'services' provides road users with confidence, based on past experience, about what they can expect. This could inform Highways England's approach to trunk road signage to make it more informative and to give a fair impression of the facilities available. This need not necessarily include adding additional information to signs, though this may be helpful. Perhaps blue 'services' signs could be used on the trunk road network where services meet motorway standards? Or could alternative words, symbols or colours signal to drivers that particular trunk road services meet a minimum standard? Similar information could be provided to satnav and app developers.

Providing advance notice of services on trunk roads should be considered. The research found that motorways users find mileage boards advising of services ahead reassuring and useful. If it is helpful on a motorway to understand your stopping options, there seems no reason why it would not also be helpful on trunk roads. If providing mileage boards on Highways England's 'A' roads prevents even a small proportion of drivers from running out of fuel or not stopping to rest when they should, there will be safety and other benefits. The current situation also leads to misleading information. For example, on the A1(M) in Hertfordshire signs indicate how far it is to the next motorway

service area on the A1(M) at Peterborough, failing to mention the many services on the intervening section of A1 trunk road between Baldock and Alconbury.

Information about roadside facilities

Transport Focus recommends that Highways England seeks to ensure

that there is trusted and reliable information available to users about services and roadside facilities on or near the Strategic Road Network.

The research not only found that road users lack confidence in the availability, consistency and quality of services on trunk roads, but also that it seems to road users that there is a lack

of information about roadside facilities generally. This could be improved by making trusted information more readily available to users and third-party website and app developers. The lack of information about roadside facilities can be contrasted with the detailed information, including opening hours, availability of toilets and other facilities, provided about railway stations.



Cleanliness of toilet facilities

Transport Focus recommends that operators of motorway service areas and other services seek to meet road users' challenge that they want greater consistency in cleanliness, especially of toilets.

One concern about both motorway service areas and trunk road services that was shared by all road users was cleanliness, especially of toilet facilities. Access to clean toilet facilities is a basic requirement for road users when they stop, and toilets that are not clean are likely to result in a poor experience.

How we carried out this research

The research involved 12 focus groups at various locations around England, covering both motorways and major 'A' roads. Road users taking part included drivers making leisure and business trips, as well as those who drive as part of their job (for example delivering parcels).

Four of the focus groups looked at issues specific

to lorry drivers, and we interviewed coach drivers, disabled drivers, motorcyclists and a number of stakeholders within the road freight industry.

We also incorporated 'in the moment' feedback from road users visiting eight services of different size, age, geographic location and run by a range of different companies.



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