



A safe place to park

What lorry drivers want during disruption to cross-Channel services

Objectives and methodology overview

Objective to understand:

- Heavy good vehicle (HGV) drivers' experiences of Traffic Assessment Project (Operation TAP - queues on the A20 approach road to Dover Port)
- The facilities HGV drivers would like from the Lorry Park potentially to be constructed close to M20 Junction 11 (to remove the need for Operation Stack)

Methodology

Exploratory stage:
Qualitative scoping
exercise



Main stage:
Quantitative survey

Conducted in
February and March
2016

Methodology





Qualitative scoping exercise

20 short qualitative interviews with drivers to:

- Inform what categories of facilities to test in the quantitative stage
- “Test out” interview locations – logistical considerations, challenges, most effective interviewing approach, etc.
- Determine the languages in which to conduct the survey to ensure the majority of drivers could take part

Quantitative (main) survey

- 15 minute interview conducted on tablet computer
- Interviews with HGV drivers conditional on their experiencing TAP at least twice since 1 Jan 2016
- Paired interviewing shifts across 4 locations:

	Return Dover-Calais Ferry (P&O)
	Return Dover-Calais Ferry (DFDS)
	Stop 24 Services, Folkestone
	Roadchef Services, Maidstone













- Questionnaire translated into Polish and Romanian – native speakers on interviewing team
- £5 cash incentive offered
- No quotas imposed – “natural fall-out” approach taken

Survey responses (245 interviews achieved)

Spread of employment status, goods carried, and nationality of respondents is shown below

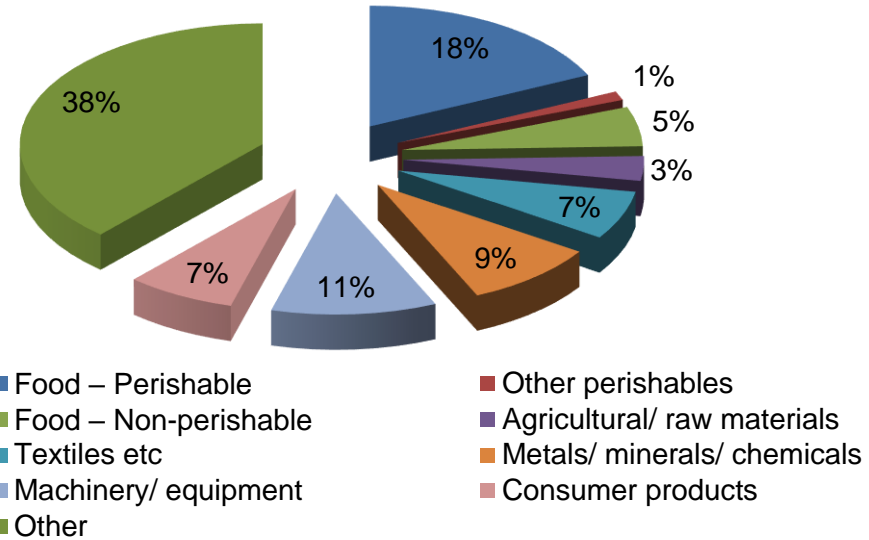
Nationality of survey respondents

	Polish	31%
	British	30%
	Romanian	16%

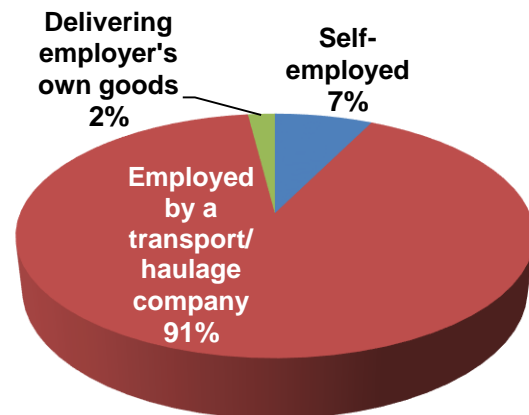
	Slovak	} 3% each		Hungarian	} 2% each
	Dutch			German	
	Lithuanian			French	
	Czech	} 1% each		Bulgarian	} <1% each
	Latvian			Estonian	
	Croatian			Italian	

Other 5%

Goods carried



Employment status



Views on Operation TAP

(lorries queuing on the A20 approach road to Dover Port)

How well do drivers feel TAP is handled?

Feedback on handling of TAP is mixed

Around half are satisfied with most aspects – but relatively few are very satisfied

Satisfaction is highest with the approachability of police/ highways staff

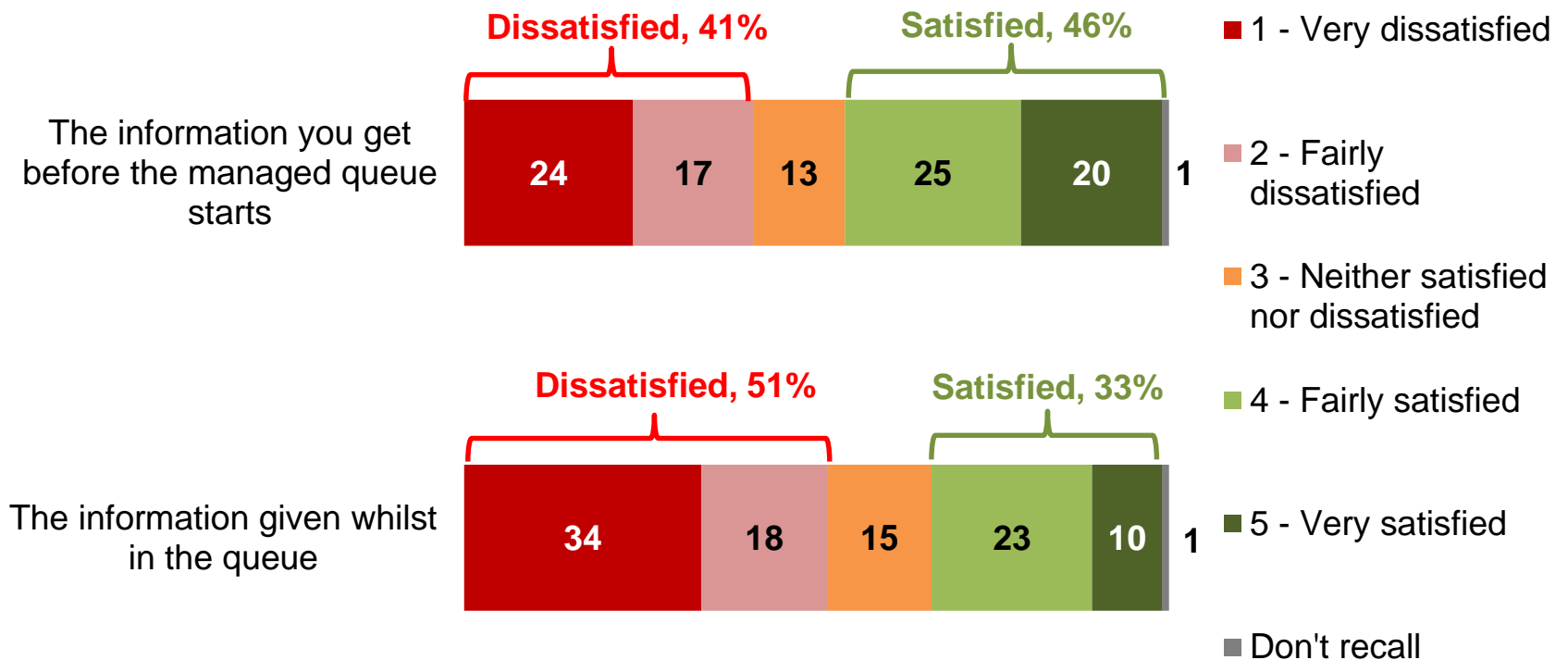


From Q1. "Thinking generally about how the Authorities handle those queues into Dover Port or the Tunnel. How satisfied or dissatisfied are you with the following?" Base: 245

TAP: satisfaction with information given

Satisfaction levels lower for information, especially information given while in the queue

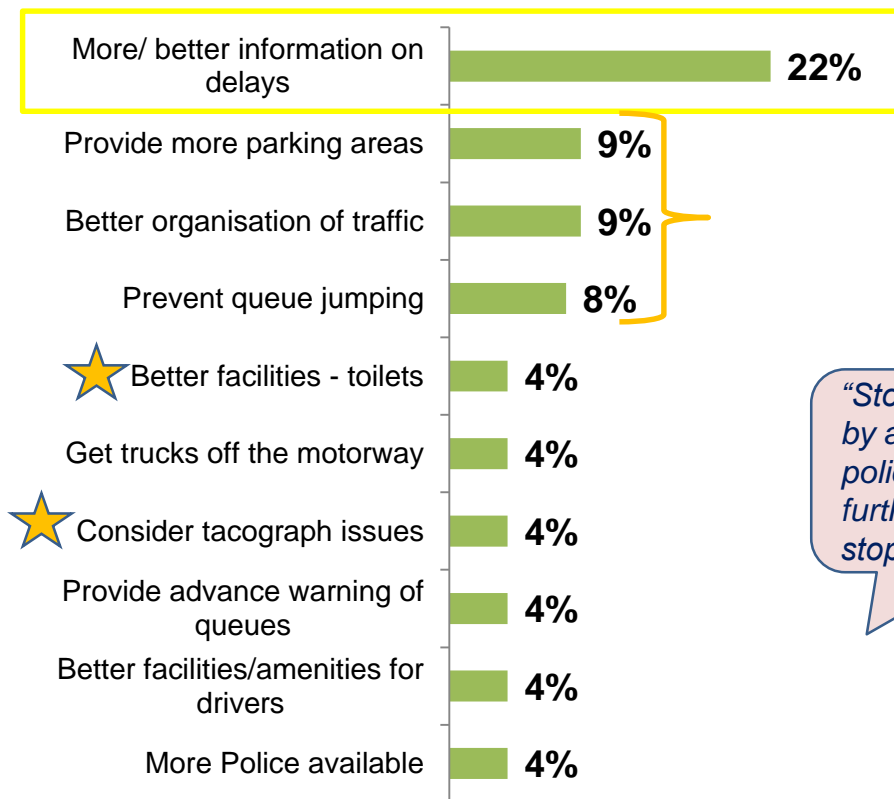
Half of drivers are dissatisfied and only one third are satisfied



What would drivers change about TAP?

Information is also the most common thing drivers would improve if they were in charge of TAP
 More parking areas, better organisation of traffic and prevention of queue jumping also top “wish list”
 Drivers’ comments – TAP should have a tacho time exemption, option to sleep/rest out the TAP wait (rather than inching along over same period)

What would drivers change about TAP if they were in charge?



“Drivers need to be more informed, drivers are restricted with driving times so need to build this into breaks.”

“Foreign language interpreters to provide information and how the queues is advanced. Police should provide an official letter recognized in the whole EU to justify hours worked according to tachograph.”

“Stop queue jumping by all drivers. The police need to be further up the line to stop drivers cutting in.”

“Try and get all the lorries off the road into a holding area.”

“Let people know where they are in the queue and how long you will spend in the queue.”

From Q3. “If you were the person in charge of that queueing system - what one thing would you change to how it is run?”
 Base: 245 Coded responses to open ended question. Top 10 responses shown.

TAP: information needs

Drivers highlight the importance of quality information supplied as early in the process as possible, with a particular wish to know how long the delay might be so they can plan stops accordingly



Those satisfied with the information praise the following:

- Getting an explanation of what is happening
- Being told how long they will have to wait
- Being well informed in advance
- Good/helpful police



Those dissatisfied with the information highlight the following:

- Lack of any information
- Information not being given early enough
- More information desired on how long the wait might be
- More information desired on the nature of the problem

Advance information can help with optimal planning of required tacho stops/breaks

“Information if received is fair, but it’s difficult when 10 miles of traffic is queueing to get info.”

“There is no information - we have nothing and rely on the internet.”

“We just don’t get any information at all.”

“More information could be given on mobile signs if possible, so drivers can see what is going on.”

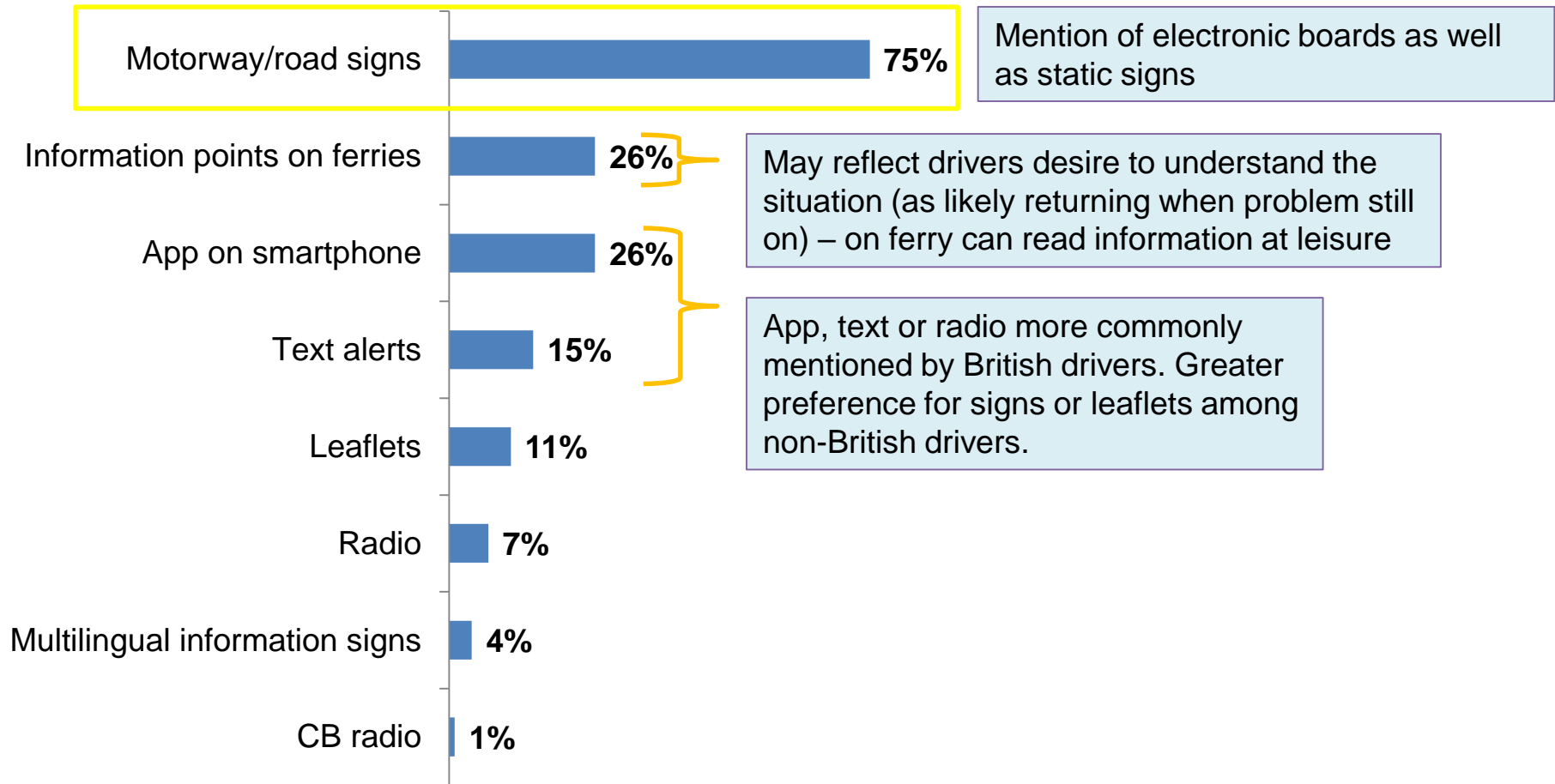
“Just a lot more information please.”

“The police do not tell drivers how long their wait is and we are just left hanging around with nowhere to eat/drink/shower or toilets.”

“There IS information given but very often not in time.”

TAP: how should information be communicated?

Motorway/ road signs strongly favoured as best way to communicate information



What Lorry Park facilities drivers want

Introduction

Introduction to what Lorry Park facilities drivers want

Length of stay

- 1) The Lorry Park is intended to take the place of Operation Stack, which means drivers would stay at the Lorry Park from three hours to overnight or longer.
- 2) We tested what facilities would be a priority for stays of: a) three hours; b) eight hours (but not overnight); and c) overnight, so we would know drivers' priorities for the most likely lengths of stay at the Lorry Park.

Discovering their priorities

- 1) Using the facility categories identified as important from the qualitative stage, we produced a 'menu' of facilities the Lorry Park might have for a three hour; eight hour; and overnight stay.
- 2) We used a 'restricted choice' methodology. In essence, it works as follows: you cannot have every facility provided on this menu, what are you willing to give up? In practice this was a two stage process:
 - First, for that duration of stay drivers were shown the full menu of facilities and then told, you cannot have all of them, and you must take away a few facilities from what you can have; identifying their first level of priority.
 - Second, we said you are allowed even fewer facilities, pitching this new level at the point where tough choices between facilities needed to be made. This reveals what really matters most to drivers.

Basis on which they made priority choices

Drivers were told: a) Lorry Park facilities including food, drink and accommodation would be free of charge (when directed there by the authorities); b) the authorities would direct all lorries via the Lorry Park instead of queuing on-road as before c) drivers wait their turn to leave and then drive straight into Dover Port /Tunnel; and d) entry/exit roads from the M20 would be designed to cater for HGVs.

**Lorry Park facilities
for a three-hour stay**

Three-hour stay: facilities offered and restricted choices put to drivers

- 1) Drivers were shown five 'categories' of facilities that might be provided at the Park: a) toilets/showers; b) food/drink; c) other amenities; d) vehicle security; and e) location of facilities, together with levels at which that facility might be provided (see the table below). **We explained that if the highest level of facilities were provided across all five categories (all the green options) it would correspond to "12 points' worth" of facilities being provided.**
- 2) We then told drivers they couldn't have the highest level in each category (12 points' worth of facilities) but were 'restricted' to only 10 points' worth of facilities. In other words, they had to sacrifice two points' worth from the ideal [note: they had to include at least the minimum in each facility category].
- 3) Drivers were then restricted to seven points' worth of facilities. In other words, told to sacrifice a further three points' worth of facilities from their 10 points choice. This focussed drivers on what really mattered most to them.

Toilets/showers	Food & drink	Other amenities	Vehicle security	Location
<u>1 point (minimum)</u> Toilets only	<u>1 point (minimum)</u> Snacks & hot drinks	<u>1 point (minimum)</u> Small/conv. shops, tables and chairs area	<u>1 point (minimum)</u> Park perimeter fence only	<u>1 point (minimum)</u> 10 minute walk from their lorry
<u>2 points (maximum)</u> Above + showers	<u>2 points (maximum)</u> Above + full canteen	<u>2 points (maximum)</u> Above + lounges, recliners, TV, Wi-Fi, USB	<u>2 points (middle)</u> Above + CCTV & brightly lit bay areas	
			<u>3 points (maximum)</u> Above + entry/exit checks, security patrols	<u>3 points (maximum)</u> Next to your lorry (lorry in sight)

Three-hour stay: initial priorities (10 points restricted choice)

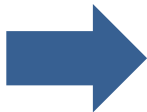
In the most popular 10 point choice, facilities being near their lorry is sacrificed to maintain everything else at maximum

None sacrificed the provision of showers

In none of the main combinations was vehicle security sacrificed below middle level

% of drivers choosing each of the combinations shown below-right for their 10 points' worth of facilities

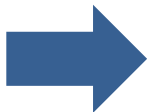
52%



Toilets/ Showers	Food & drink	Other amenities	Vehicle security	Location of facilities
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Max (2 pts)	Max (2 pts)	Max (2 pts)	Max (3 pts)	Min (1 pts)
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14%



Max (2 pts)	Min (1 pts)	Min (1 pts)	Max (3 pts)	Max (3 pts)
----------------	----------------	----------------	----------------	----------------

11%



Max (2 pts)	Max (2 pts)	Min (1 pts)	Middle (2 pts)	Max (3 pts)
----------------	----------------	----------------	-------------------	----------------

Other combinations:
23% in total

Three-hour stay: what matters most (7 points restricted choice)

In all the most popular combinations, facilities being near to lorry and superior 'other amenities' are sacrificed to the minimum level

In only a small minority of combinations are showers sacrificed

In the second most popular combination, drivers keep better food/drink at the expense of middle level vehicle security

% of drivers choosing each of the combinations shown below-right for their 7 points' worth of facilities

38%



Toilets/ Showers	Food & drink	Other amenities	Vehicle security	Location of facilities
Max (2 pts)	Min (1 pts)	Min (1 pts)	Middle (2 pts)	Min (1 pts)
Max (2 pts)	Max (2 pts)	Min (1 pts)	Min (1 pts)	Min (1 pts)
Min (1 pts)	Min (1 pts)	Min (1 pts)	Max (3 pts)	Min (1 pts)

20%



13%



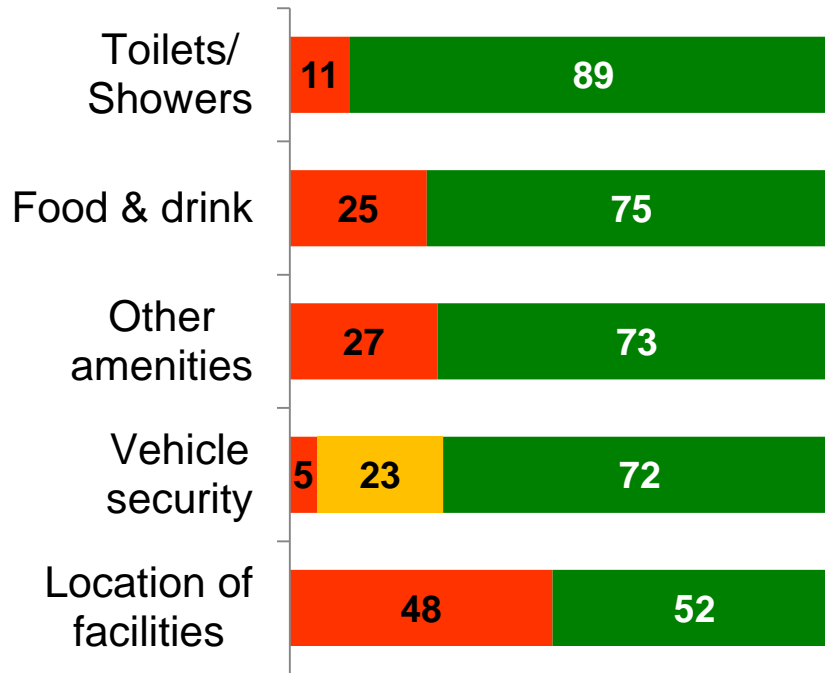
Other combinations:
28% in total

Three-hour stay: summary

When forced to prioritise to what matters most:

- Toilets and showers stay as a priority
- Facilities being near their lorry is not sufficiently important
- Better 'other amenities' are sacrificed by most
- Four in ten accept minimum vehicle security but six in ten want at least middle level

Restricted choice (10 points):



Restricted choice (7 points):



Min ■ Middle ■ Max ■

**Lorry Park facilities
for an eight-hour stay
(but not overnight)**

Eight-hour stay: facilities offered and restricted choices put to drivers

- 1) Drivers were shown five 'categories' of facilities that might be provided at the Park: a) toilets/showers; b) food/drink; c) other amenities; d) vehicle security; and e) location of facilities, together with levels at which that facility might be provided (see the table below). **We explained that if the highest level of facilities were provided across all five categories (all the green options) it would correspond to "13 points' worth" of facilities being provided.**
- 2) We then told drivers they couldn't have the highest level in each category (13 points' worth of facilities) but were 'restricted' to only 11 points' worth of facilities. In other words, they had to sacrifice two points' worth from the ideal [note: they had to include at least the minimum in each facility category].
- 3) Drivers were then restricted to eight points' worth of facilities. In other words, told to sacrifice a further three points' worth of facilities from their 11 points choice. This focussed drivers on what really mattered most to them.

Toilets/showers	Food & drink	Other amenities	Vehicle security	Location
<u>1 point (minimum)</u> Toilets only	<u>1 point (minimum)</u> Snacks & hot drinks	<u>1 point (minimum)</u> Small/conv. shops, tables and chairs area	<u>1 point (minimum)</u> Park perimeter fence only	<u>1 point (minimum)</u> 10 minute walk from their lorry
<u>2 points (maximum)</u> Above + showers	<u>2 points (maximum)</u> Above + full canteen	<u>2 points (maximum)</u> Above + lounges, recliners, TV, wi-fi, USB	<u>2 points (middle)</u> Above + CCTV & brightly lit bay areas	
		<u>3 points (maximum)</u> Above + gym, cinema, large shops/store	<u>3 points (maximum)</u> Above + entry/exit checks, security patrols	<u>3 points (maximum)</u> Next to your lorry (lorry in sight)

Eight-hour stay: initial priorities (11 points restricted choice)

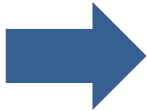
Mirrors 3-hour stay, in that of all popular combinations, none sacrifice showers

In all popular combinations, none sacrifice better food and drink

Drivers sacrifice nearness of facilities or the level of 'other amenities'

% of drivers choosing each of the combinations shown below-right for their 11 points' worth of facilities

42%

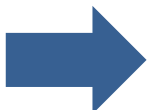


Toilets/ Showers	Food & drink	Other amenities	Vehicle security	Location of facilities
Max (2 pts)	Max (2 pts)	Max (3 pts)	Max (3 pts)	Min (1 pts)
Max (2 pts)	Max (2 pts)	Middle (2 pts)	Middle (2 pts)	Max (3 pts)
Max (2 pts)	Max (2 pts)	Min (1 pts)	Max (3 pts)	Max (3 pts)

26%



13%



Other combinations:
19% in total

Eight-hour stay: what matters most (8 points restricted choice)

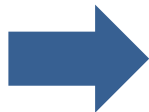
In every main combination, drivers keep showers and sacrifice the nearness of facilities to their lorries

Drivers not willing to sacrifice fully on vehicle security in any of the main combinations

When down to the essentials – better ‘other amenities’ are sacrificed by the majority

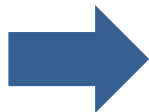
% of drivers choosing each of the combinations shown below-right for their 8 points' worth of facilities

26%



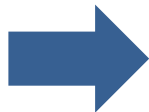
Toilets/ Showers	Food & drink	Other amenities	Vehicle security	Location of facilities
Max (2 pts)	Max (2 pts)	Min (1 pts)	Middle (2 pts)	Min (1 pts)

24%



Max (2 pts)	Min (1 pts)	Min (1 pts)	Max (3 pts)	Min (1 pts)
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16%



Max (2 pts)	Min (1 pts)	Middle (2 pts)	Middle (2 pts)	Min (1 pts)
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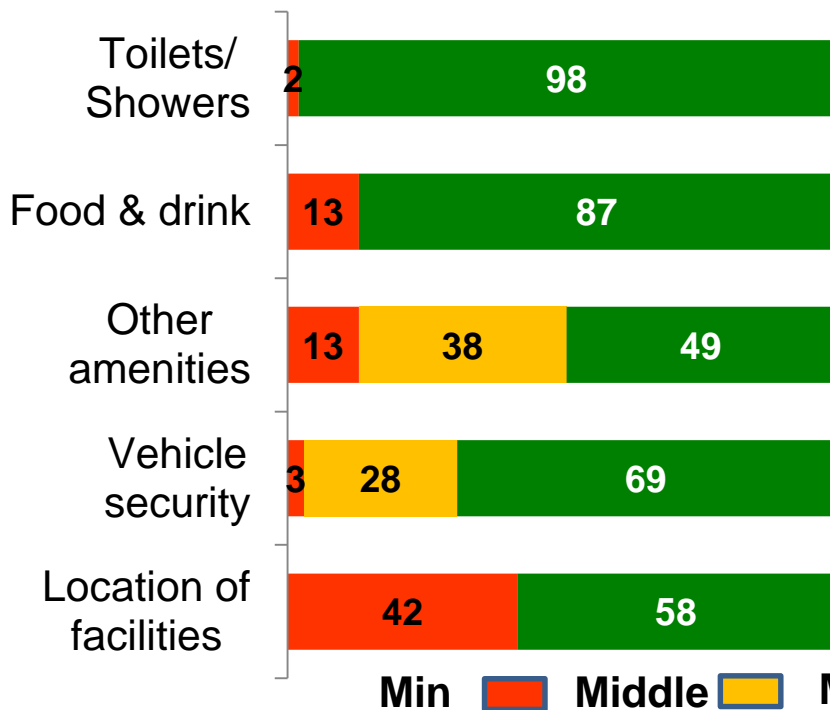
Other combinations:
33% in total

Eight-hour stay: summary

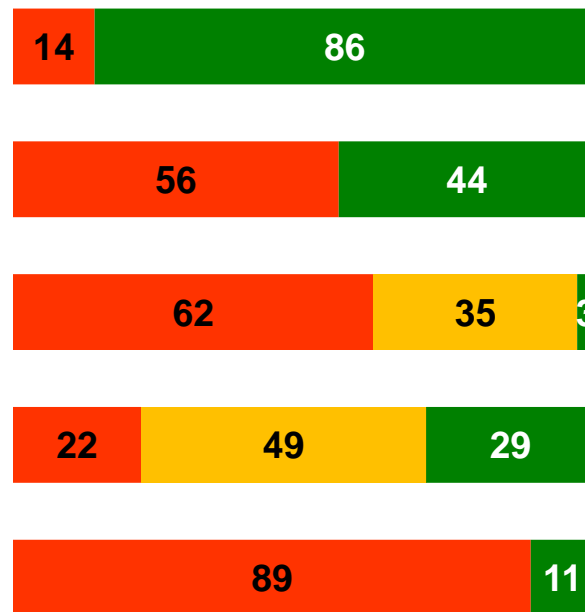
When forced to prioritise to what matters most:

- Priority is that there are showers - higher than with three hour stay
- Very few tolerate minimum on vehicle security – most want at least mid-level on this facility
- How near facilities are to their lorries is less important than other categories
- Better food/drink and better 'other amenities' are each priorities for four in ten drivers

Restricted choice (11 points):



Restricted choice (8 points):



Min ■ Middle ■ Max ■



Lorry Park facilities

An overnight stay

Overnight stay: facilities offered and restricted choices put to drivers

- 1) Drivers were shown five 'categories' of facilities that might be provided at the Park: a) toilets/showers; b) food/drink; c) other amenities; d) vehicle security; and e) overnight accommodation, together with levels at which that facility that might be provided (see table below). **We explained that if the highest level of facilities were provided across all five categories (all the green options) it would correspond to "13 points' worth" of facilities being provided.**
- 2) We then told drivers they couldn't have the highest level in each category (13 points' worth of facilities) but were 'restricted' to only 11 points' worth of facilities. In other words, they had to sacrifice two points' worth from the ideal [note: they had to include at least the minimum in each facility category].
- 3) Drivers were then restricted to eight points' worth of facilities. In other words, told to sacrifice a further three points' worth of facilities from their 11 points choice. This focussed drivers on what really mattered most to them.

Toilets/showers	Food & drink	Other amenities	Vehicle security	Accommodation
<u>1 point (minimum)</u> Toilets only	<u>1 point (minimum)</u> Snacks & hot drinks	<u>1 point (minimum)</u> Small/conv. shops, tables and chairs area	<u>1 point (minimum)</u> Park perimeter fence only	<u>1 point (minimum)</u> No sleeping facilities (sleep in lorry)
<u>2 points (maximum)</u> Above + showers	<u>2 points (maximum)</u> Above + full canteen	<u>2 points (maximum)</u> Above + lounges, recliners, TV, Wi-Fi, USB	<u>2 points (middle)</u> Above + CCTV & brightly lit bay areas	
		<u>3 points (maximum)</u> Above + gym, cinema, large shops/store	<u>3 points (maximum)</u> Above + entry/exit checks, security patrols	<u>3 points (maximum)</u> Bedrooms provided

Overnight stay: initial priorities (11 points restricted choice)

Almost two thirds chose the combination to keep higher facilities across the other categories but sleep in their lorry

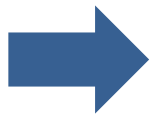
All main combinations chosen include showers

In none of the main combinations have drivers sacrificed fully on vehicle security or on having better 'other amenities'

% of drivers choosing each of the combinations shown below-right for their 11 points' worth of facilities

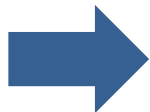
Toilets/ Showers	Food & drink	Other amenities	Vehicle security	Accomm odation
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62%



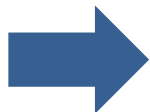
Max (2 pts)	Max (2 pts)	Max (3 pts)	Max (3 pts)	Min (1 pts)
----------------	----------------	----------------	----------------	----------------

14%



Max (2 pts)	Max (2 pts)	Middle (2 pts)	Middle (2 pts)	Max (3 pts)
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10%



Max (2 pts)	Min (1 pts)	Middle (2 pts)	Max (3 pts)	Max (3 pts)
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Other combinations:
14% in total

Overnight stay: what matters most (8 points restricted choice)

Wider range of combinations chosen by drivers

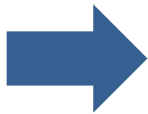
But showers a priority across them all; and all drivers now forego sleeping in a room to sleeping in their lorry

Generally drivers sacrifice better food/drink and better 'other amenities' to keep at least medium level vehicle security

% of drivers choosing each of the combinations shown below-right for their 8 points' worth of facilities

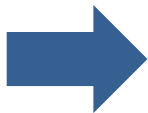
Toilets/ Showers	Food & drink	Other amenities	Vehicle security	Accomm odation
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29%



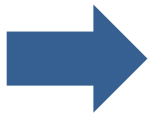
Max (2 pts)	Min (1 pts)	Min (1 pts)	Max (3 pts)	Min (1 pts)
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26%



Max (2 pts)	Max (2 pts)	Min (1 pts)	Middle (2 pts)	Min (1 pts)
----------------	----------------	----------------	-------------------	----------------

15%



Max (2 pts)	Min (1 pts)	Middle (2 pts)	Middle (2 pts)	Min (1 pts)
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Other combinations:
30% in total

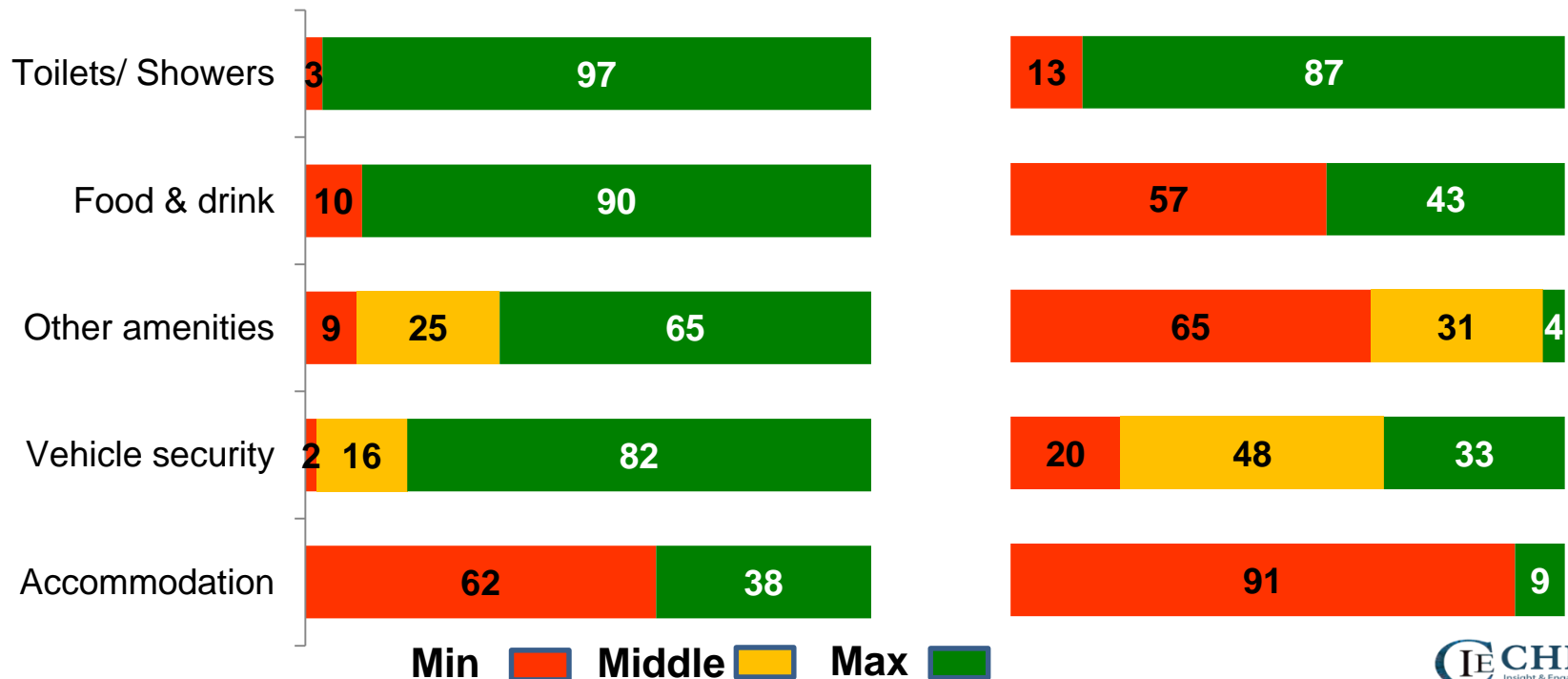
Overnight stay: summary

When forced to prioritise to what matters most

- Priority is showers and at least medium level vehicle security
- Sleeping in a bedroom sacrificed in almost all cases to keep better facilities in other categories
- About four in ten put better food & drink and better 'other amenities' on their 'matters most' list

Restricted choice (11 points):

Restricted choice (8 points):

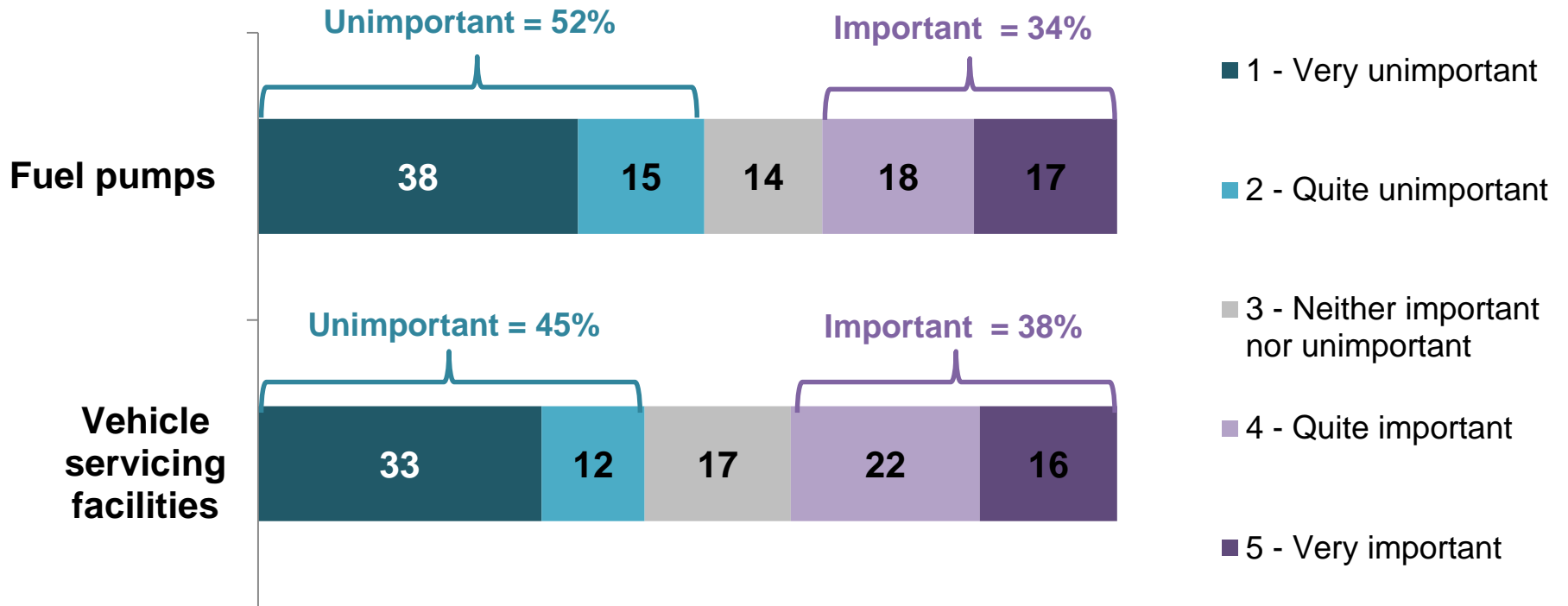




Lorry Park facilities – Fuel pumps and vehicle servicing

Importance of fuel pumps and vehicle servicing facilities

These facilities would be important only to around a third of drivers (and are unimportant to around half)

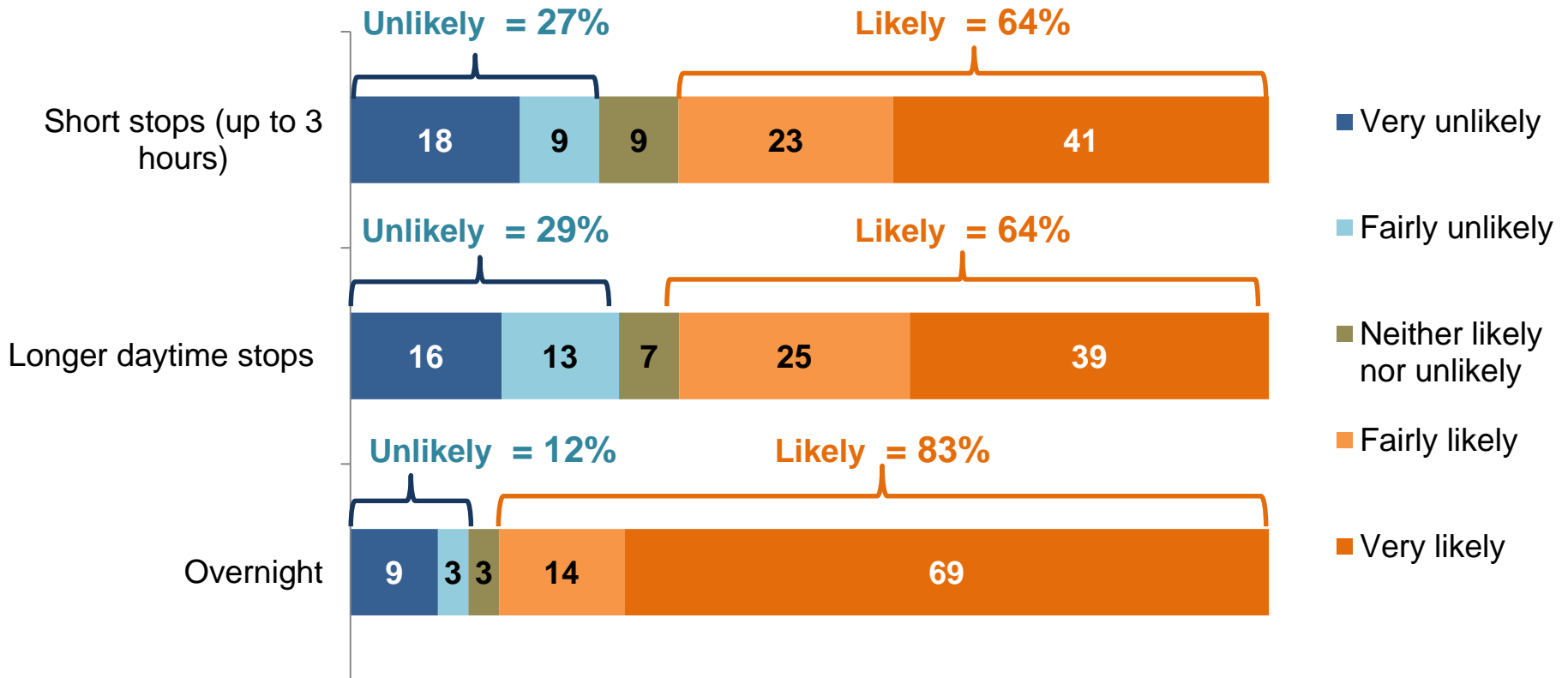


Voluntary usage of the Lorry Park

Likelihood of using Lorry Park other than when sent there

Around two in three would be likely to use the Lorry Park for daytime stops

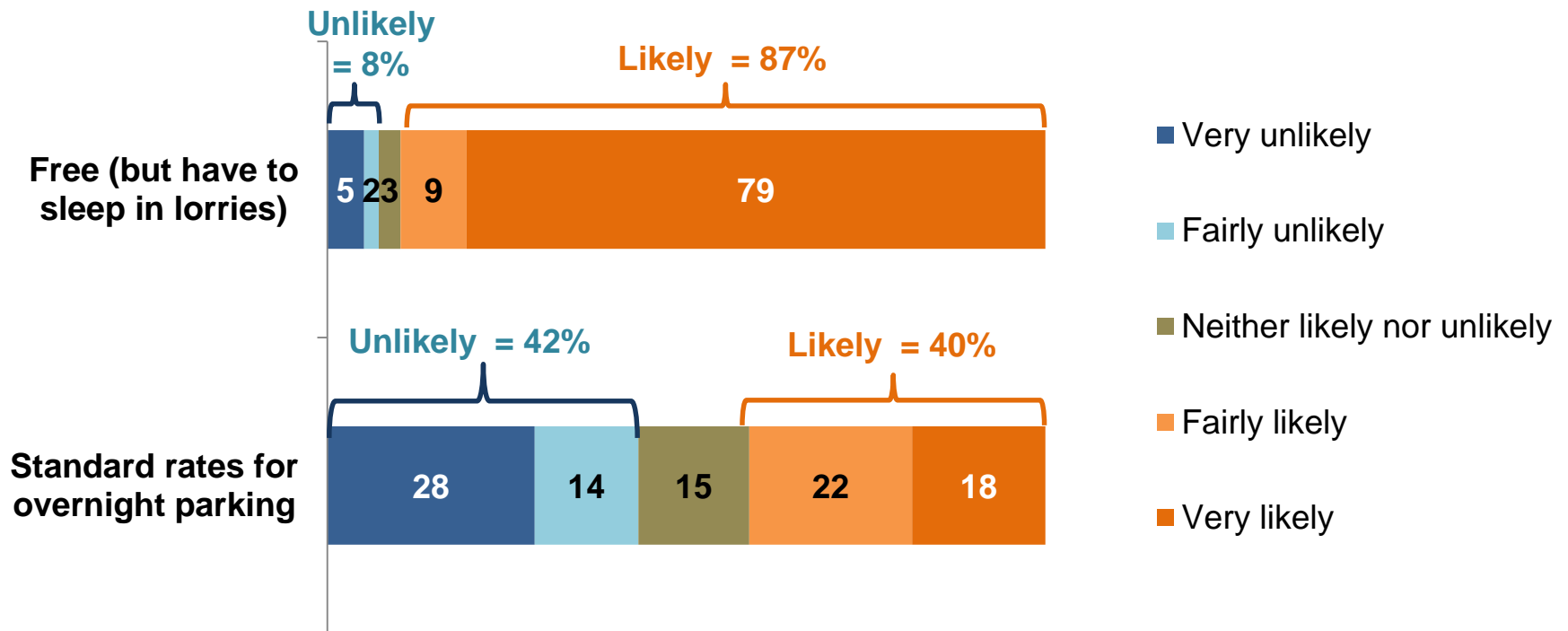
Around eight in ten say likely to use it for overnight stops (if needing to stop in area)



From Q6. "The lorry park will be located near Junction 11 of the M20. Excluding when police direct lorries to the lorry park, how likely or unlikely is it you would use the lorry park on the following occasions?"
Base:245

Perceived likelihood 'fly-parkers' would use the Lorry Park

- A strong belief current fly-parkers would use the Lorry Park if it was free
- More mixed views if market rates were charged



From Q7 "Now thinking about the drivers who park up their lorries overnight on hard shoulders, rural verges, or local streets in Kent, how likely would these drivers be to use the Lorry Park for overnight parking if.....a) space was made available to park for free (but they would sleep in their lorries), b) space was made available them, but they had to pay standard lorry park rates for overnight parking" Base: 245

Key messages

Key messages: Operation TAP

1. Drivers have mixed views about how TAP is handled, with a substantial number dissatisfied with all aspects we asked about. The approachability of police/highways staff is the best rated aspect.
2. Information is a key aspect drivers identify as needing improvement, with a particular call for delay length information as early as possible to help them plan their driving schedules.
3. If caught in Operation TAP, drivers want to know about the nature of the problem and how long the wait might be, with motorway/road signs identified as the best way to communicate

Key messages: Lorry Park core facilities

1. Showers, rather than just toilets stand out as a clear priority for drivers – even for short stays.
2. Vehicle security is important for all lengths of stay.
3. The Lorry Park's facilities being near to their lorry is not an overriding priority.
4. The longer the stay, the greater the importance attached to better food/drink facilities and better 'other amenities'.
5. Sleeping facilities are a lower priority for most. When forced to prioritise to what matters most they are willing to sleep in their cabs to maintain better provision across other facility categories.

Key messages: Lorry Park additional facilities

1. Less than half felt fuel pumps or vehicle servicing facilities were important to have at the Lorry Park.
2. A high proportion of drivers believe they would be likely to use the Lorry Park on other occasions (i.e. when not directed there by the authorities) especially for overnight stops.
3. Drivers believe those who currently 'fly-park' in Kent would use the Lorry Park instead if space is offered to them for free.
4. Drivers were less sure 'fly-parkers' would use it if market rates were charged, but still nearly half of drivers thought they would.