

LORRY DRIVER'S FACILITIES SURVEY - PILOT

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Prepared for:



Agenda

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1. OBJECTIVES

Objectives

- This is a small scale initial exploratory qualitative project looking to build on the current understanding of the subject and scope out the core issues for a wider pilot study due to take place between now and the end of March 2022.
- The nature of this project is such that the findings are more generally indicative or directional rather than concrete.

Specific Objectives

- To expand Transport Focus's understanding of the current experience of lorry drivers when it comes to using roadside facilities, particularly those on the SRN. This will include their needs and behaviours, the improvements they perceive are required and their interactions with other users of the facilities.
- To identify key differences in facilities provided at different types of roadside facilities (with a focus on truck stops, large services on 'A' roads, medium services on 'A' roads).
- To establish the factors that play a part in capacity constraints / facilities being full.
- To establish whether there is any evidence that the relaxation of cabotage rules is impacting upon capacity/availability of facilities and the lorry driver experience at roadside services.
- To establish from drivers (likely EU-based ones) whether and to what extent they are making use of the relaxation of cabotage rules..
- To identify where / how an interviewer administered survey might be conducted, and how this might vary by time of day, for the different types of roadside facilities, to inform the pilot survey design.

2. METHOD & SAMPLE

Method & Sample

- The fieldwork consisted of a combination of observation, ethnography and intercept F2F interviews with lorry drivers and members of staff at Truck Stops and MSAs
- Fieldwork took place at:
 - 1 small independent truck stop
 - 3 medium independent truck stops
 - 2 large truck stops
 - 2 MSAsLocations ranged from North West to South East
- At each location, the following research was undertaken:
 - A simple audit of the facilities available to lorry drivers (e.g. number of parking spaces, whether showers are available, food options, rest areas etc.)
 - Identification of suitable places for an interviewer to conduct a quantitative survey
 - Observation of lorry driver behaviour
 - Intercept interviews with lorry drivers
 - Interviews with site management
- Fieldwork was conducted by Teresa Hadfield between 22nd December 2021 and 13th January 2022

Observation on sample

- As the fieldwork was conducted at truck stops and MSAs, the sample were HGV drivers who preferred to stop at these locations rather than in roadside laybys
- These learnings will reflect their inherent biases
- It can be hypothesised that these drivers were more likely to:
 - be employed rather than self-employed
 - have overnight parking paid for by their employer
 - have parking paid directly by their employer rather than claiming back via expenses

3. THE 2 MINUTE DEBRIEF

Parking, showers and food

- Availability and quality of parking are the key issues for HGV drivers:
 - There is not enough parking for all trucks, particularly for overnight stops
 - Have to prioritise parking over work and look to find somewhere from 3pm onwards
- These concerns are closely followed by cost of parking, shower facilities and the quality of food:
 - Parking considered to be expensive, inclusion of meal vouchers enhances VFM perceptions
 - Quality of showers was a regular complaint, especially with regards to insufficient number of showers and general cleanliness
 - Drivers want decent food (do not want to live on fast food all week)
- It was clear that truck stops were favoured over MSAs as they focus on providing services the drivers want and because they respect and value drivers
- There was no evidence to support the hypothesis that the relaxation of cabotage has contributed to capacity / availability of parking facilities

For the pilot survey

- Two key areas to approach drivers – at exit point from lorry park and parking payment area. It is not advisable to approach drivers in their cabs
- F2F is the preferred method of contact but all had smart phones and were technically able, an electronic link or QR code should be feasible. Telephone contact was not a popular approach (but might work)
- Timings will be important, drivers appear to be available:
 - 3pm-8pm Monday to Thursday (stopping for longer breaks)
 - Potentially 10-1pm Monday to Thursday (but stopping for shorter breaks)
 - Potentially reaching European drivers over the weekend
- Classification of drivers may not be straightforward
- There are key differences between Trampers and Day Drivers. Trampers sleep in their cabs at night and they have greater needs from services and facilities than day drivers. Thus, might want to consider upweighting trampers within the sample?
- Questions will need to be in clear, simple language and have specificity (shower facilities are not the same as toilets, CCTV and manned security are different levels of service)
- All truck stops and MSAs would in principle support a survey of HGV drivers and would promote the survey on their social media

4. KEY LEARNINGS

4.1 IMPLICATIONS FOR PILOT SURVEY

The challenge of engagement

HGV drivers are not easy to engage with

- They are usually:
 - Time short
 - Suspicious of strangers
 - Wary of being intercepted
 - Not necessarily articulate

However, once engaged and trusting they talk with ease

- They need to
 - know their views are wanted and valued
 - be assured of anonymity
- The difficulty then:
 - is keeping them on topic
 - and limiting the interview time

Opening introductions needs to gain their trust and interest immediately

Methods of engagement

- Drivers preferred method of engagement is through F2F contact:
 - Possible to conduct short interviews inside
 - Might be possible to conduct impromptu paired depths or even mini groups in some locations
- All technically competent and familiar with smart phones and apps (work schedules are on their phones, use QR codes for COVID testing etc). It should therefore be feasible to use a link to an online survey. However, it will be necessary to ensure that they complete the survey about that specific experience at that services/facility (they may have made several subsequent stops)
- Drivers appeared to be less willing to want phone interviews – do not answer unknown numbers
- Timing is important:
 - Easier to catch drivers between 4pm and 8pm when they have finished driving (trampers)
 - Can catch trampers and day drivers on morning breaks between 10 and 1pm
- Real challenge in reaching EU drivers, recommendation is to try key services and truck stops over the weekend when they are not driving – this will have implications for sample design (a specific type of break and services)

Consideration of timing of survey, mode of communication & reaching EU drivers

Enhancing engagement

- Most of the truck stops and services have a Facebook page
- Potential to use these pages to promote the survey – when and where it is happening
- HGV drivers are a community and there is a lot of communication between them:
 - Potential to snowball potential respondents?
 - Recommend a friend?
- Free cup of coffee or tea?
- May be able to create an online community – need an insider track (Julie Charles?)
- NB Hypothesis that weather can make a difference. Drivers more likely to leave their trucks even on short breaks when it was not raining

Can we make use of social media to promote participation?

Access to drivers

- Guidance is not to approach drivers in their cabs in lorry park
- Two key access points to drivers:
 - Exit area of lorry park, can see and identify lorry drivers as they approach the service area
 - By SNAP or other payment area (SNAP payment has added advantage of being able to see the language selection for identifying foreign drivers), staff taking payment are willing to identify HGV drivers
- However, approaching drivers by payment area may mean missing those drivers stopping for 2hr free parking



Need to watch out at exit areas for those not going to make payments, can probably assume those stopping prior to 3pm are not stopping overnight?

Classification might be complicated

- In response to ‘What are you driving?’
 - “I drive a Scania artic”*
 - “I’m class 1”*
 - “A 44 tonne Volvo”*
 - “A six wheeler”*
- Some key dimensions emerged:
 - Trumper or day driver
 - Employed of self-employed
 - Agency freelancer or self-employed with their own truck
- EU drivers:
 - Based in UK
 - Based in Europe but working for UK Company
 - Based in Europe but working for EU Company
- Eastern European drivers?

Language of questions will be important

- Some usual questions will be of questionable value – ‘Likelihood to revisit?’
 - Depends upon my route, depends on the traffic, tacho timings etc
 - Not a ‘preference’ choice
- Clarity and simplicity of questions, not the most articulate of audiences
- Reference to that services/truck stop on that occasion or more generally?
- Specificity i.e.
 - toilets and showers are not the same, need to be differentiated
 - Security of parking, need to differentiate between CCTV and manned security

Drivers responded better to simple, straightforward questions that were ‘easy’ to answer

4.2 DRIVER CHARACTERISTICS

Trampers and day drivers have very different needs

Trampers

- Sleep in their truck
- On the road 4+ days a week
- Overnight parking is priority
- Regular or irregular routes
- Start 3-4am, finish from 3pm
- Availability of parking, and price of parking critical
- Home cooked food is priority
- Decent showers a priority

Day Drivers

- Only driving day / night
- At home every day
- Needs from services and facilities are more limited
- Cost of parking not an issue, as they make use of 2hr free parking
- They have other issues such as where to park for breaks in towns/cities

Trampers needs are greater, may wish to upweight them in the sample

Patterns of behaviour - guidance

Trampers

- Often start 3/4am
- Stop 8/9am
- Drive until 3/4pm, park up overnight
- Shower and evening meal from 4pm onwards
- Do take short breaks during the day
- Monday - Thursdays

Day Drivers

- More varied behaviour depending on their job
- Depends on their route and pick-ups/deliveries
- But more regular behaviour, often driving the same routes (have preferred stopping points)
- Stops are shorter

European Drivers

- It was almost impossible to catch European drivers
- As such there is no feedback on cabotage
- The European drivers deferred to 'the office' – sets the schedule
- However, they did not claim any additional collections or deliveries
- There was a sense that there were fewer European drivers around during the Christmas/New Year period (and potentially deterred by very high rates of Omicron in UK). The expectation was that levels were likely to increase over the next month or so
- Consistent feedback that European drivers (especially Eastern European) spend minimum amounts at services and facilities:
 - Bring food and drink with them
 - Only use shower and toilet facilities
- There was evidence of low level resentment from both drivers and service operators towards European drivers taking up space, using facilities but not adding to the economy

4.3 DRIVER ATTITUDES & BEHAVIOUR

Overall attitudes to services and facilities

- General perceptions of services and facilities was poor:
 - Cost
 - Quality of food
 - Cleanliness of showers
- Feeling that HGV drivers were not welcome and of low priority, especially with MSAs
- Truck stops much preferred:
 - Felt valued by truck stops
 - Geared up to them as professional drivers
 - Known by staff, talked to as human beings, recognised as essential workers (a great deal of resentment over lockdown, essential workers but no provision of services other than at MSAs – and then only sandwiches, no hot food, no shower, cannot drive a truck through the drive-thru etc)
- (NB price of putting up truck-stop signage on motorways)

HGV drivers don't like MSAs

“Truck stops have the drivers at heart”

“Motorway services just want your money”

“Majority of MSAs are just interested in profit”

“I try not to use motorway services”

“For instance Oxford Services, it's a 7-8 minute walk to the services, you use the toilet and then queue with everyone else to get a coffee and that's your 30 minute break taken with no rest”

“Sometimes the parking is so far from the services you don't even bother to go to the toilets”

“You can't always use meal vouchers in all the motorway services outlets. I can't get myself a nice pasta take-away from M&S”

“I don't want to live off fast food all week”

They like truck stops - recommended by drivers....

- Formula Ellesmere Port
- J23 Lorry Park
- M4 Chippenham Pit Stop
- ADS Stoke
- Route 74
- Lockerbie Lorry Park
- Stockyard
- Junction 24
- The Old Fox Truckstop
- Santini's
- Red Lion
- Hollies
- Rothwell Truck Stop
- Cambridge Services

Audit of facilities

	Large TS	MSA	Small TS	Large TS	Large TS	Medium TS	Medium TS	Small TS	MSA
Parking	130 + Managed Good hard- standing Usually full	50 Good hard- standing	10 Good hard- standing 80-90% full	200 Managed Good hard- standing Usually full	225 Managed Good hard- standing Usually full	80? Managed Tight Banksman Muddy/dus- ty Usually full	80 Managed Tight Banksman Crumbling hard- standing Usually full	50 + Excellent hard- standing Always full, park down the hill on roadside	130 Managed Excellent hard- standing Usually full
Price	£22.20 29.00 with MV	£28 £30 with MV	£23 include MV	£20 with £2 MV £26 with £8 MV	£25, £28 with £10 MV	£25 with £1-3 MV, £31 with £10MV	£58.80, £39.40 (12hours)	Free	£30
Restaurant	Home- cooked, table service	Fast food & Costa	Home- cooked, table service	Home- cooked, table service	Home- cooked, table service	Home- cooked, table service	Home- cooked, table service	Home- cooked, table service	Fast food & Costa
Showers	Plenty	Yes	Yes	Plenty	12	Yes	6	1	4
Security	CCTV & manned	CCTV	CCTV	CCTV & manned	CCTV & manned	CCTV & manned	CCTV & manned	None	CCTV & manned

Availability of overnight parking is the key issue

	Large TS	MSA	Small TS	Large TS	Large TS	Medium TS	Medium TS	Small TS	MSA
Parking	130 + Managed Good hard- standing Usually full	50 Good hard- standing	10 Good hard- standing 80-90% full	200 Managed Good hard- standing Usually full	225 Managed Good hard- standing Usually full	80? Managed Tight Banksman Muddy/dust y Usually full	80 Managed Tight Banksman Crumbling hard- standing Usually full	50 + Excellent hard- standing Always full, park down the hill on roadside	130 Managed Excellent hard- standing Usually full

- Availability of overnight parking is key issue, look to stop from 3pm onwards in order to secure an overnight spot
- Managed parking is valued, organised by departure times, more likely to get a good night's sleep, refrigerated lorries are in separate area
- Quality of hard-standing can be an issue, but not high on the priority list
- Where parking is tight (small spaces) banksman is used (park the trucks up for the drivers)

It is hard to plan overnight parking

- It is difficult to pre-plan parking as driver cannot reliably predict where they will be
- If the lorry park is full:
 - they have to continue to the next service area/truck stop
 - Potentially drive illegally over their hours
 - Or risk parking in insecure and dangerous laybys (in their opinion)
- Risby, Coopers & Rougham Hill very busy because of the closure of Orwell Crossing Lorry Park, they claim to be the first stops after Felixstowe
- Photo of lorry queue into Rothwell Truck Stop because of accident at top of slip road



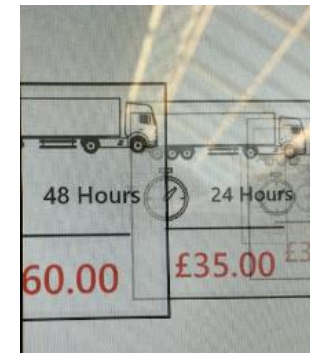
Variable quality of hard-standing



Price and VFM of overnight parking varies

	Large TS	MSA	Small TS	Large TS	Large TS	Medium TS	Medium TS	Small TS	MSA
Price	£22.20	£28 £30	£23	£20 with	£25, £28	£25 with	£58.80	Free	£30
MV = meal voucher	29.00 with MV	with MV	include MV	£2 MV £26 with £8 MV	with £10 MV	£1-3 MV, £31 with £10MV	(24h) £39.40 (12h)		

- Overall cost of parking is thought to be expensive, especially in comparison with parking in Europe (tend to use 2hr free or 24hr)
- Varies considerably from location to location
- As does value for money
- Parking with meal voucher seemed the most popular as reduced direct cost for driver
- Can be a real barrier for self-employed drivers and those who have to claim back expenses
"You might not have £30 in your bank account if you're paid weekly"



Can end up parking in laybys

- On A14 from c8.00pm all laybys were full of HGVs parked up from Rothwell Truck Stop to Bury St Edmunds
- On A14 laybys west of Cambridge Services started filling up from 3.30pm
- Considered dangerous parking, laybys are insecure and too narrow to be able to safely exit lorry (often end up mounting the verge)
- Photos of layby parking on A14



Home cooked food is valued

	Large TS	MSA	Small TS	Large TS	Large TS	Medium TS	Medium TS	Small TS	MSA
Restaurant	Home-cooked, table service	Fast food & Costa	Home-cooked, table service	Home-cooked, table service	Home-cooked, table service	Home-cooked, table service	Home-cooked, table service	Home-cooked, table service	Fast food & Costa

- Want home cooked food rather than fast food (hand-made chips, not frozen)
- An extra free cup of tea, coffee
- Truck stops offer table service and named service
- Often long standing staff
- Drivers know the staff, staff know the drivers
- Price £7-10 for two course meal
- Meal vouchers important – included in cost of parking, reduces direct cost to driver (subsistence around £10 per day)

Shower facilities

	Large TS	MSA	Small TS	Large TS	Large TS	Medium TS	Medium TS	Small TS	MSA
Showers	Plenty	Yes	Yes	Plenty	12	Yes	6	1	4

- How many in proportion to parking spaces?
- Cleanliness
- Plentiful hot water
- Exchange keys for shower ✓ (accepted best practice)
- Space, chair etc
- Know it's a challenge for providers
- Recognise that not all drivers respect the facilities

Security of parking is also a high priority

	Large TS	MSA	Small TS	Large TS	Large TS	Medium TS	Medium TS	Small TS	MSA
Security	CCTV & manned	CCTV	CCTV	CCTV & manned	CCTV & manned	CCTV & manned	CCTV & manned	None	CCTV & manned

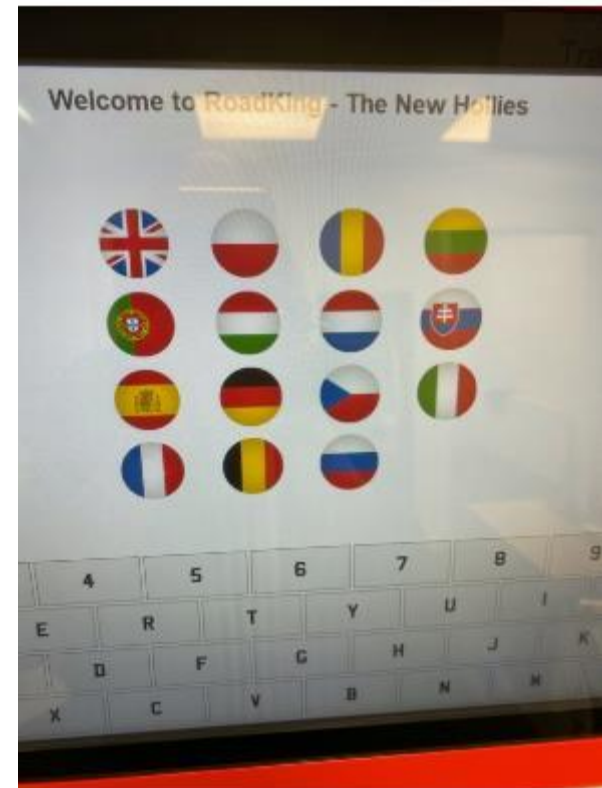
- Need to differentiate between just CCTV and manned security
- Manned security increases feeling of safety, leads to better nights sleep
- Key concerns over:
 - Curtain slashing
 - Stealing diesel
- There is a perceived difference between CCTV vs ANPR, belief that MSAs CCTV is actually ANPR...

“Checking we’ve paid rather than giving us security”

Snap is popular with drivers

	Large TS	MSA	Small TS	Large TS	Large TS	Medium TS	Medium TS	Small TS	MSA
Snap	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes

- SNAP payment highly valued by drivers
 - Company payment
 - Opportunity to include food voucher (reduced cost to them)
 - Language choice
- Owned by Certas, who have taken over Hollies and Red Lion (collaboration opportunity?)
- Good place to identify drivers and potentially find EU drivers



Truck washing service is a draw

	Large TS	MSA	Small TS	Large TS	Large TS	Medium TS	Medium TS	Small TS	MSA
Truck Wash	Yes	No	No	Yes	No	Yes	No	No	No

- Great additional service
- Demonstrates care for drivers needs
- Can be reason to stop in that location
- Usually sub-contracted by service operator
- An agreed expense with their employer, c£30 paid on Snap – matter of pride for driver and Haulage Company



Additional services

	Large TS	MSA	Small TS	Large TS	Large TS	Medium TS	Medium TS	Small TS	MSA
Lounge/TV	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	No
Extras...	Gym, computers, laundry, games room, bar Polish signage, massage chairs		External access at night to toilets	Bar, rooms, games area	Gym, games area 24hr hot food	Polish speaking External access at night to toilets	External access at night to toilets No refrigerated lorries	External access at night to toilets	

- Additional services are valued more for their symbolic significance rather than their reality, they reflect the outlet's attitude to drivers
- Importantly these extras can give drivers a greater sense of 'normality' i.e:
 - A work out in the gym or a beer at the end of the day
- A final comment around fuel. There was some mention of finding services / facilities with specific brands of fuel tied to the drivers' fuel cards. But 24hr access to fast fuelling pumps was valued by drivers (mentioned at some of the truck stops)

Perceptions of European Services

- The feedback from drivers was that services in Europe were far better than in UK
 - Availability of reasonably priced (or free parking)
 - Quality of food
 - Quality of shower facilities
- Whilst it was claimed that transport costs had gone up everywhere, most European countries were felt to deliver better VFM
- Mixed messages re France – free to park if you buy food, but food either good value because you get a full 3 course meal, or ridiculously expensive!

Please treat this feedback with caution, I found few European drivers to talk to and am not sure how up-to-date some of these perceptions were