



Lorry Drivers' Facilities Research

Insight Report

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Background

Objectives

Focus of this report

Programme Objectives

1. Provide Actionable Feedback on Lorry Driver Facilities in and around the SRN

- Measure the experience of lorry drivers at a range of service types including Motorway Service Areas, Truck Stops and 'A' Road services
- Gather quantifiable feedback on the experience – on overarching and more detailed aspects of their experience
- Gather qualitative feedback on the experience, and on potential solutions or experience enhancements that could be used to support better facilities
- Identify the aspects of the experience that matter most to lorry drivers and those that would have the greatest impact upon their experience

2. Develop and Optimise an approach for continual tracking of Lorry Driver Facilities Experiences

- Test a range of potential approaches through which lorry drivers can feedback on their experience to identify those that provide the greatest volume, and high quality, of feedback
- Identify best practices for undertaking research with this audience and in this environment
- Explore approaches that enable lorry drivers to provide feedback across multiple sites – allowing the research to cover a wider range of facilities and sites robustly
- Establish the potential for a large-scale programme – and likely operational costs.

Summary of Approach

Phase 1 – Cognitive testing to support questionnaire design

Five cognitive interviews at a Motorway Service Area and Truck Stop to test both the survey mechanics and content and content of the Phase 2 quant survey. Using same methodology as Phase 2 to ensure comparability.



Phase 2 – Quantitative survey to measure lorry driver experiences of site facilities

1,797 interviews conducted across 120 shifts at 20 different sites. Lorry drivers intercepted between lorry park and facilities. Drivers were able to self-complete on site, or complete afterwards via paper questionnaire, or online survey accessed by QR code or email/ SMS (text) invite.



Phase 3 – Qualitative interviews

Following recruitment at Phase 2, 20 drivers were contacted for 30-45 minute telephone interviews.



Phase 4 – ‘On the ground’ feedback from drivers via quantitative diary survey

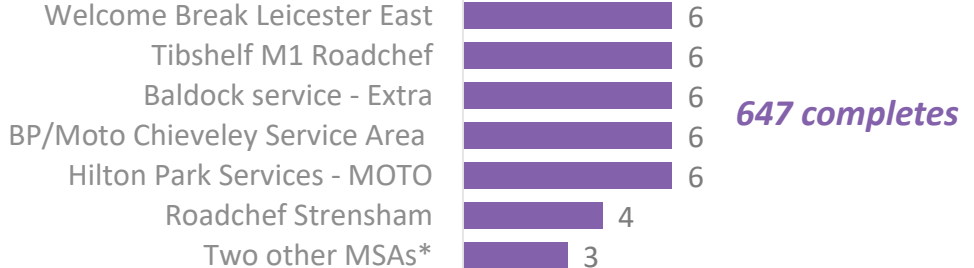
367 quant diary entries were completed by 73 lorry drivers recruited from Phase 2.

120 (7-hour) shifts were conducted between 15th Feb – 13th March 2022

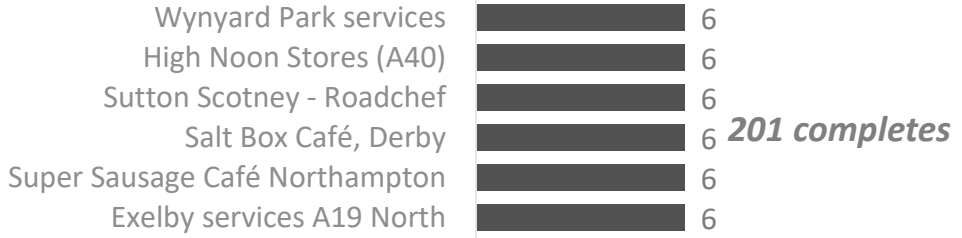
47 shifts at 6 Truck Stops



37 shifts at 8 Motorway Service Areas (MSAs)



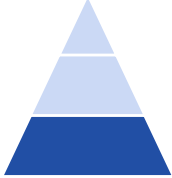

36 shifts at 6 'A' Road services



*Base sizes at these two MSAs are too low for individual analysis

Executive Summary

Key findings

<p>Needs</p> 	<ul style="list-style-type: none"> ▪ Lorry drivers’ needs when stopping are simple; they stop because it's a legal requirement, and to use key facilities such as toilets, food and fuel. Those travelling overnight need a place to park and rest overnight. ▪ The different types of facilities cater differently to these needs, and lorry drivers have adapted their behaviour accordingly: <ul style="list-style-type: none"> ▪ 'A' Road services meet an urgent need – they enable breaks and provide fuel. ▪ Motorway Service Areas (MSAs) provide some wider benefits - they are readily available, however they are expensive, especially for food. ▪ Truck Stops cater more directly to drivers’ needs for rest, security and food, especially on longer stops.
<p>Planned vs. unplanned</p>	<ul style="list-style-type: none"> ▪ MSAs and 'A' Road services are more widely available and used by almost all drivers as day stops. Drivers are more likely to plan visits to Truck Stops because of their good reputation. This is also why they spend more time and plan overnight stops there.
<p>Covid-19 effect</p>	<ul style="list-style-type: none"> ▪ Almost half of lorry drivers feel services have become worse in recent years, with a lot of this being attributed to Covid-19.
<p>Satisfaction</p> 	<ul style="list-style-type: none"> ▪ General satisfaction with the sites visited is relatively high – reflecting that expectations are tailored to the type of facility chosen and the drivers’ needs on that occasion. <ul style="list-style-type: none"> ▪ Truck Stops are tailored to lorry driver needs, so achieve higher levels of satisfaction. They are also used for longer stops – so putting less time pressure on the use of facilities. ▪ MSAs are meeting many of the same needs as Truck Stops – but with an offer more focused on drivers of passenger vehicles. ▪ 'A' Road services are more limited in offer – but used for simpler purposes – so are relatively capable of meeting those. ▪ A core driver of satisfaction is a feeling of being valued. All changes that lorry drivers want to see made (food, showers, security, parking) are on issues which disproportionately impact them, rather than the general road user. The claimed ‘nice to have’ of a welcoming atmosphere actually has a big impact on their overall satisfaction with a site visit.

The Lorry Driver context

Profiling information

Description		Phase 2 Intercepts		Phase 3 Depths		Phase 4 Diary	
Gender	Male	98%	1756	16	99%	72	
	Female	2%	33	4	1%	1	
Age	18 – 34	15%	270	6	21%	15	
	35 – 54	52%	939	7	49%	36	
	55+	32%	580	7	30%	22	
Number of years working as a lorry driver	Less than 1 year	3%	45	2	1%	1	
	1 – 4 years	12%	209	4	19%	14	
	5 – 9 years	16%	285	5	19%	14	
	10 – 19 years	25%	447	3	18%	13	
	20 + years	45%	811	6	42%	31	
	SUMMARY: More than 9 years	70%	1258	9	60%	44	
SUMMARY: Less than 9 years	30%	539	11	40%	29		
Country of residence	UK	81%	1434	19	96%	70	
	Outside UK*	19%	334	1	4%	3	
Employment status	Company owner/partner/director	4%	79	0	8%	6	
	Agency	5%	94	2	7%	5	
	Employee of one company	90%	1618	18	85%	62	
Type of journey	Overnight in vehicle	72%	1299	13	71% of entries		
	Overnight in other accommodation	4%	70		2% of entries		
	Day-drivers	23%	411	7	24% of entries		
Weight of Vehicle	HGV/LGV 7.5 tonnes and over	97%	1752	20	96% of entries		
	HGV/LGV over 3.5 but under 7.5 tonnes	3%	45	0	4% of entries		
Type of Vehicle	Non-curtain sided vehicle	56%	1014	8	59% of entries		
	Curtain sided vehicle	43%	772	12	41% of entries		
Planned Stop	Yes	59%	1060	N/A	50% of entries		
Duration of stop	Under 1 hour	44%	799	N/A	44% of entries		
	1 – 8 hours	15%	271	N/A	12% of entries		
	9+ hours	40%	727	N/A	44% of entries		

When lorry drivers describe themselves, two themes emerge: they are both content in their own company and laid back



These personality traits came through strongly during the qualitative interviews amongst the majority of drivers when drivers described themselves and their experiences, with no discernible differences between age or length of driving. This suggests it is important to contextualise driver personality when considering how they evaluate services.

Content in own company

- Most drivers self-describe as being introverted and quite content to spend long periods of time alone.
- As a result, many do not lament the lack of entertainment or social areas during their breaks.
- Most are happy to simply stretch their legs, then return to their cabs.
- This isn't to say they don't enjoy the company of others and will not reject it if offered; but they do not seek it out.
- This is particularly true amongst older drivers who are unlikely to speak with others they do not know.
- Although, some young drivers have mentioned that they like to chat with fellow drivers on the radio and will meet up with drivers from the same company at stops if possible.

"Put it this way, I didn't become a lorry driver to make friends! If there are people about I know then great, but I'm quite happy staying in my cab on my Jack Jones. I've got everything I need here."

Laid back

- When questioned about satisfaction on services, drivers mentioned that they are not too fussy or particular about services.
- They see themselves as hardy and thick skinned, not needing luxurious services.
- They are happy with the basic necessities; a relatively clean washroom and somewhere to buy food is all they look for.
- They are also, as a group, adaptable and flexible; they are used to plans changing and bring this adaptability to their roadside facility visits too.
- They will 'take it as it comes'; if the service is good, then they are happy, and if not, then they take it in their stride and do not complain.

"We're [lorry drivers] quite thick skinned really."

"I'm quite hardy though, you know? So to me it doesn't matter too much. If they're moderately clean I'm fine. I don't even mind too much if the water's cold!"

Interviews show that lorry drivers have pursued a career in driving to see more of the country and spend time alone

Motivations for becoming a lorry driver are broadly similar to why many drivers enjoy the role. This shows that, broadly speaking, expectations of a career in trucking match the reality. Other reasons for taking the job are linked with the lifestyle of lorry driving, such as enjoyment of driving, the freedom of 'being your own boss' and a general stagnant feeling caused by other non-driving jobs – the latter was most true of newer drivers.



Core reasons for becoming a lorry driver

- ✓ To earn good money
- ✓ Because a family member drove and they have fond memories
- ✓ Recommendation from a friend
- ✓ Because they were hiring, and the driver needed a job
- ✓ Because other jobs hiring were not as appealing (with office jobs particularly shunned)

Reasons for becoming a lorry driver and for enjoying the job

- ✓ To travel and see a lot of the country
- ✓ To experience something new and different every day (avoidance of an office job)
- ✓ For the love of driving and spending time with, on, and near vehicles
- ✓ The ability to be their own boss
- ✓ For the independence

Reasons for enjoying the job

- ✓ A lot of alone time with little interaction from others
- ✓ Having their own space, a 'home on wheels' where they can settle in (for overnight and long-distance drivers)

Though most drivers claim to enjoy their job, a majority would not consider recommending it as a career to friends or relatives.

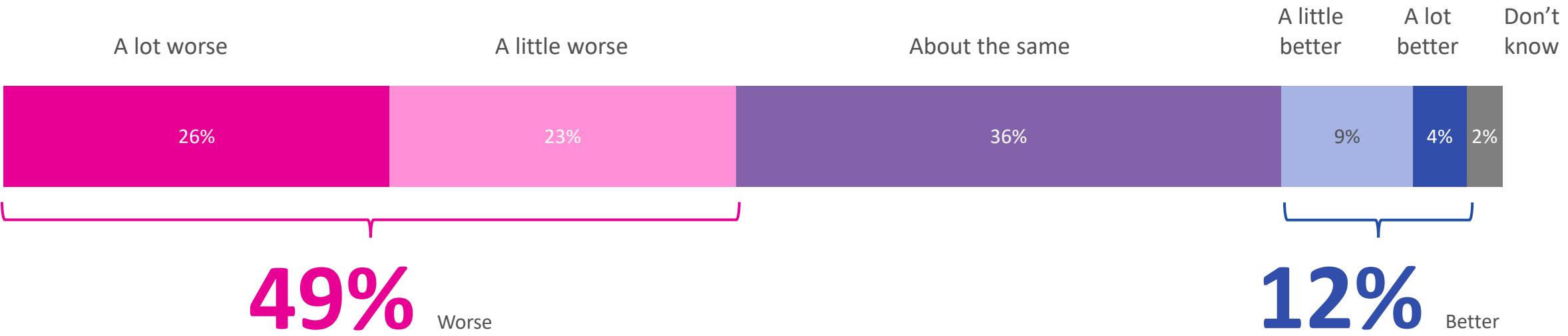
Reasons for not recommending to others

- ✗ Difficulties in maintaining relationships
- ✗ Antisocial working hours
- ✗ Poor earning potential
- ✗ Not luxurious

Drivers' reasons for not recommending the career to others were not considered off-putting to the drivers themselves. They accepted the antisocial hours, and many actually enjoyed the feeling of 'camping' and the independence of being away from home for prolonged periods. They do accept, though, that it 'isn't for everyone' as a career.

Almost half of lorry drivers who took part in the survey think services have become worse for them in the UK in the last 12 months

 Have services got better or worse for lorry drivers in the UK in the last 12 months?



Groups who are significantly more likely than the total to think services have become **worse**:

- 54% of drivers based in England, 60% of drivers based across the rest of the UK
- 61% of drivers aged 55+
- 55% of those who have been driving for over 10 years
- 52% of drivers making a multi-day trip and sleeping in their vehicle

Groups who are significantly more likely than the total to think services have become **better**:

- 28% of drivers from outside the UK
- 27% of female drivers*
- 19% of drivers aged 18-34 years old
- 17% of those who have been driving under 10 years
- 17% of those who have visited services outside the UK in the past 2 years



Source: Q15. In general, do you think services for lorry drivers in the UK have got better or worse in the last 12 months?
 Base: 1,797 Lorry drivers asked about their recent site visit

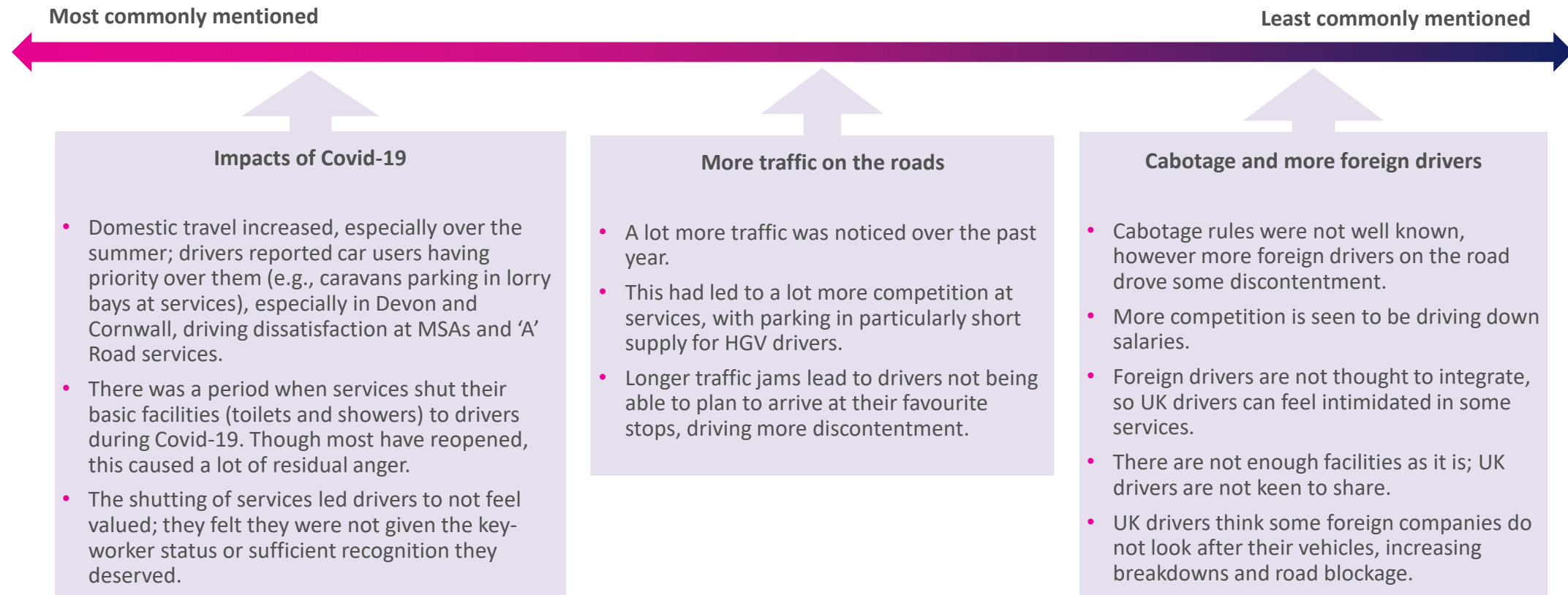
*Base size is below 50



Interviews suggest the core reason for services deteriorating is Covid-19, but lorry drivers struggle to differentiate between the past 12 months and the beginning of the pandemic

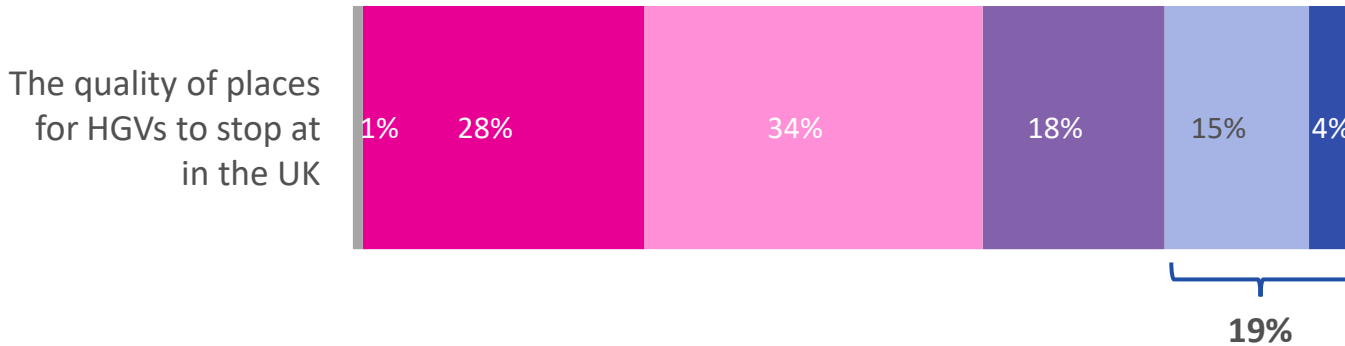
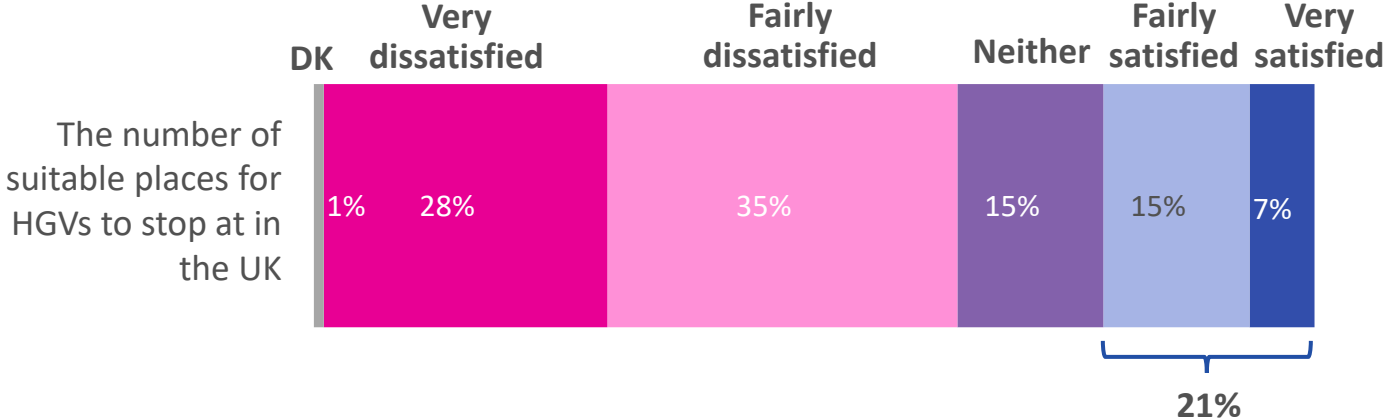


Caution: drivers may be attributing changes made at services under the March 2020 lockdown as being within the last 12 months, even though that is now over two years ago



Only 1 in 5 lorry drivers who participated are very/fairly satisfied with the number and quality of places to stop for HGVs – this is lower for drivers based in the UK and more experienced drivers

Satisfaction with UK services





	Country of residence			HGV experience	
	Drivers based in England	Drivers based elsewhere in the UK	Drivers based outside the UK	Under 10 years	10+ years
Satisfied NET	13%	15%	55%	35%	15%
Very satisfied	4%	4%	18%	11%	5%
Fairly satisfied	9%	11%	37%	24%	10%
Satisfied NET	10%	13%	55%	30%	14%
Very satisfied	2%	1%	14%	7%	3%
Fairly satisfied	8%	13%	41%	23%	11%

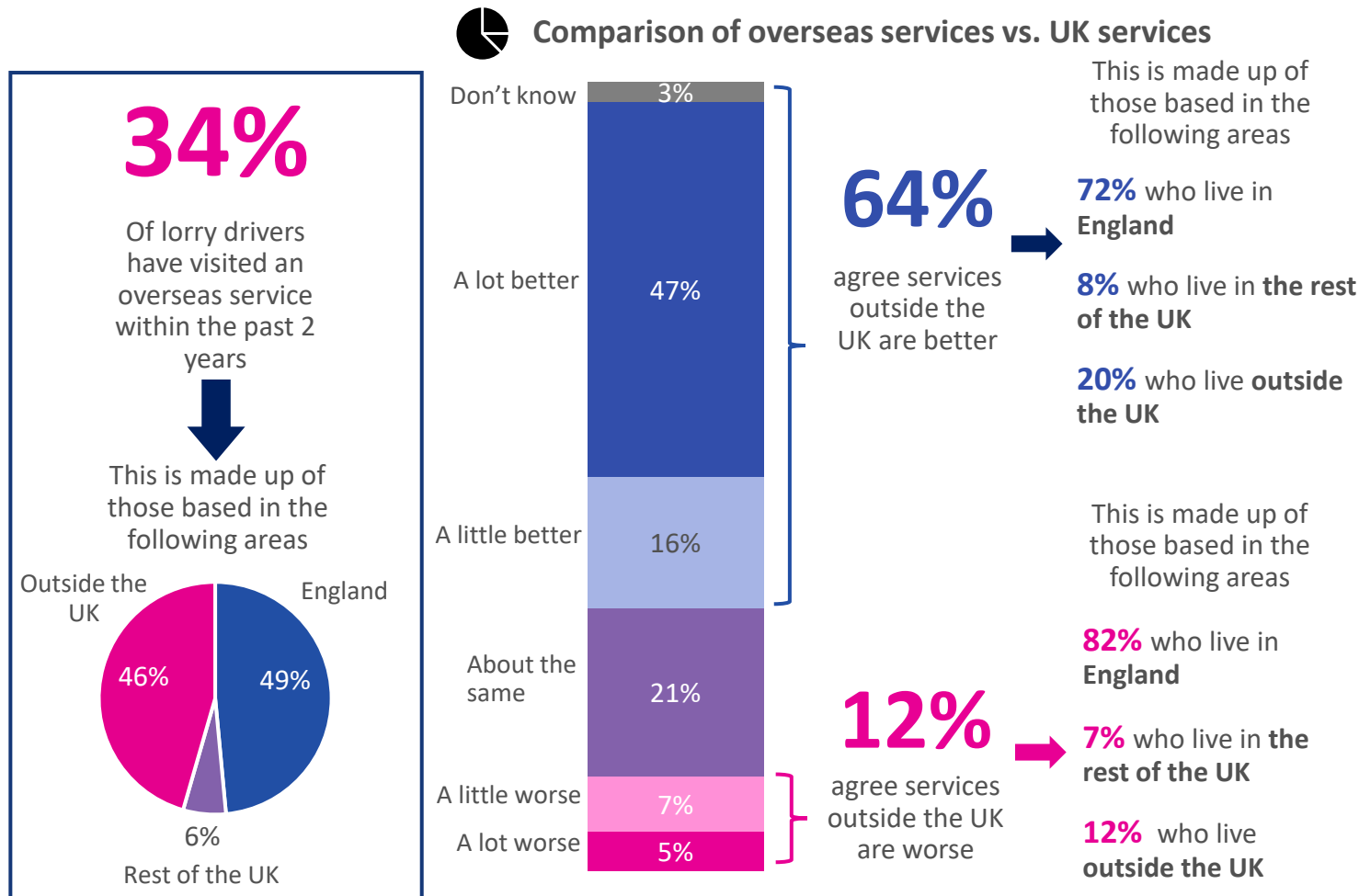


Source: Q18. Overall how satisfied are you with the following...?
 Base: 1,797 Lorry drivers asked about their recent site visit (Country lived in England 1329, Rest of UK 134, Outside of UK 334 – HGV experience under 10 years 539, 10+ years 1258)

Depths found more experienced drivers believe the profession is worse than it used to be; this belief is driven partly by the perception that roadside facilities have worsened

 <p>Most commonly mentioned</p>  <p>Least commonly mentioned</p>	Thieving and vehicle security	<p>Theft is considered a big and very common problem in the industry, and leads to a lot of frustration and anger for drivers.</p>	<p><i>"I don't know why, maybe it's with the cost of living and diesel and everything going up, but there are so many thieves about now."</i></p>
	Fewer lorry driver-centred services available	<p>As the number of major roads and town bypasses have increased, the number of truck stops and cafes have decreased. Drivers do not feel valued when they stop at services not focussed on their needs, and camaraderie amongst drivers is impacted.</p>	<p><i>"Sometimes I'll go there because whenever I do they'll say how's it going trouble, and they know"</i></p>
	Fewer alternative places to stop	<p>Drivers had more choices when it came to places to stop: laybys were serviced with toilets and refreshment stands, industrial estates welcomed them, and towns didn't have bypasses, allowing drivers to stop overnight in a town and use local cafes and pubs.</p>	<p><i>"They used to be quite happy to let you park up [in industrial estates] but now they've put double yellows all over."</i></p>
	Driving standards have decreased (other lorry and car drivers)	<p>Experienced lorry drivers believe commercial and domestic driving standards have decreased over the years, making the job a lot more dangerous.</p>	<p><i>"It used to be 25 when I started to get your licence now I think it's 18 and they're all kids"</i></p>
	Busier services (other lorry drivers)	<p>Similarly, there are more lorries on the road and lorry driver infrastructure has not kept up with this growth, leading to frustrations with parking.</p>	<p><i>"Get everyone back in lockdown because the roads were brilliant"</i></p>
	Red tape	<p>More rules and regulations have led to the job becoming less enjoyable for some.</p>	<p><i>"You used to, if you were only 10 miles or so from home, to just carry on but now if you don't stop you're in a lot of trouble. It doesn't make much sense."</i></p>

Fewer UK-based drivers have visited overseas services than those based outside the UK, but UK drivers are more likely to agree that overseas services are better



Qualitative interviews identified several reasons as to why this may be the case:

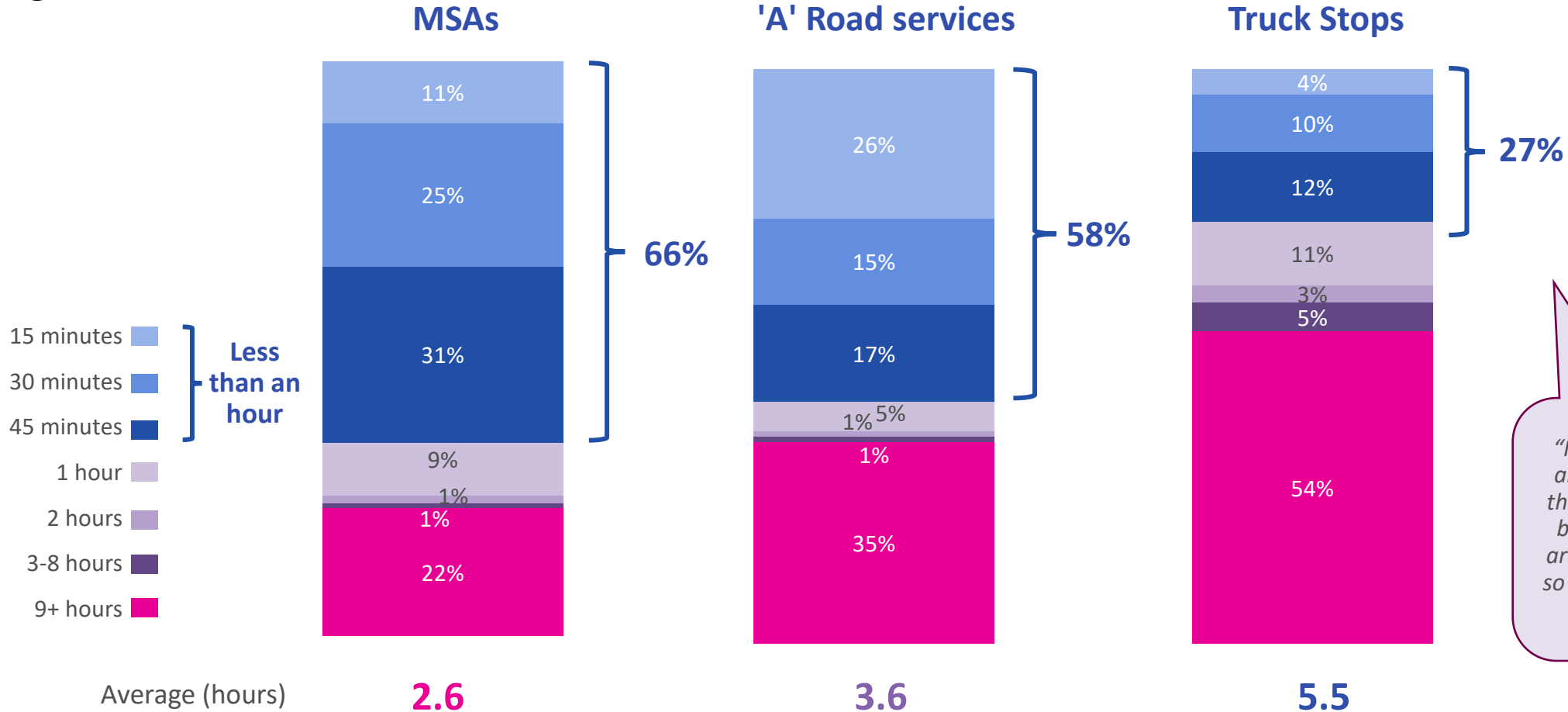
- **Security:** Service stations and laybys in Europe were considered to be a lot safer for overnight stops; with police and guard presence.
- **Value:** Some drivers reported feeling more welcomed at services and do not feel like they are less valued than car drivers.
- **Availability:** In the UK, services are perceived to be few and far between, whereas across Europe, some drivers perceive break stops to be every few miles or so.
- **Food choices:** Food choices across Europe were perceived to be better quality than in the UK.
- **Value for money:** Some mentioned that prices on the continent are a lot more reasonable for parking facilities (if they charge at all), as well as for refreshments.

Personal safety when driving in Europe was considered to be worse than in the UK. This was due mostly to migrant groups trying to make their way to England across the channel by using HGVs, which was a deterrent for some.

Lorry Drivers' experiences

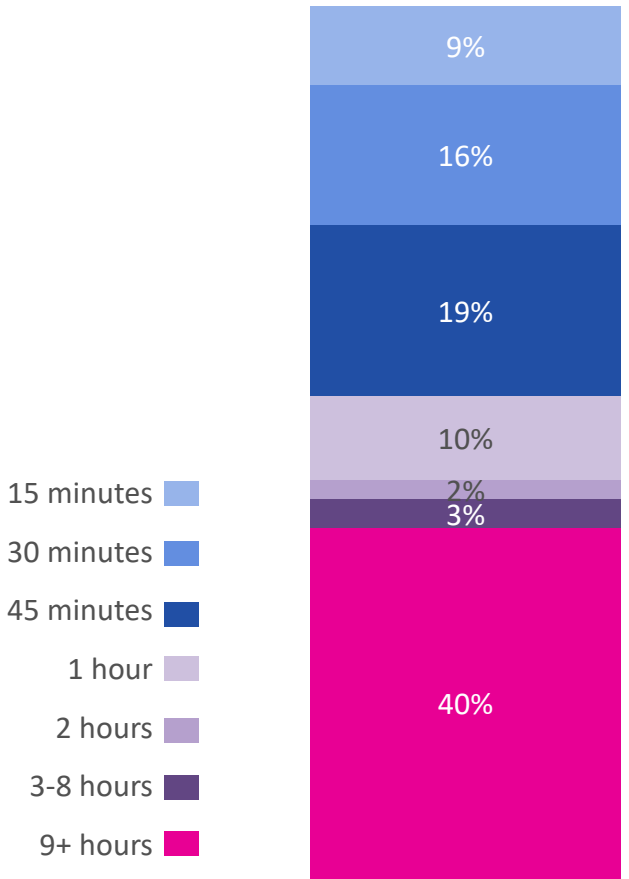
Lorry drivers tend to make longer stops at Truck Stops than at Motorway Service Areas and 'A' Road services

 Length of stay at site



Drivers have relatively basic needs when stopping - safe parking, toilets, and food – but qualitative interviews show that needs do vary slightly depending on length of stay

Length of stay at site (total)



(15 minutes – 8 hours)

Qualitative insights - needs for day stops

- **Parking close to facilities:** to allow drivers to get the most out of their breaks.
- **Affordable refreshments:** day drivers are less likely to have meals reimbursed so cheaper options are needed.
- **Free water:** water refilling stations so drivers do not have to spend money on expensive bottled water.
- **Fresh air/exercise:** a natural outdoor area, where drivers could stretch their legs during a break in somewhere that isn't a carpark.

"The toilets have got to be quite close. There's one, I think it's Oxford, where it takes you 5 minutes just to walk there. That's 10 minutes out of your break just going to and from the toilet!"

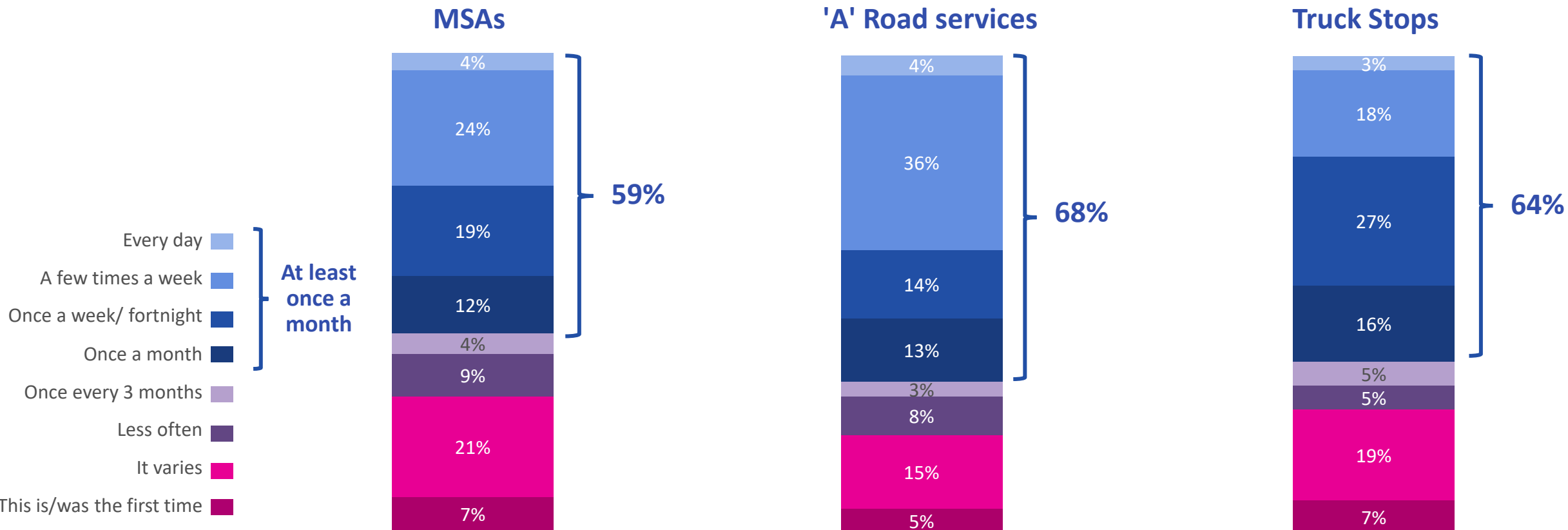
(9+ hours)

Qualitative insights - needs for night stops

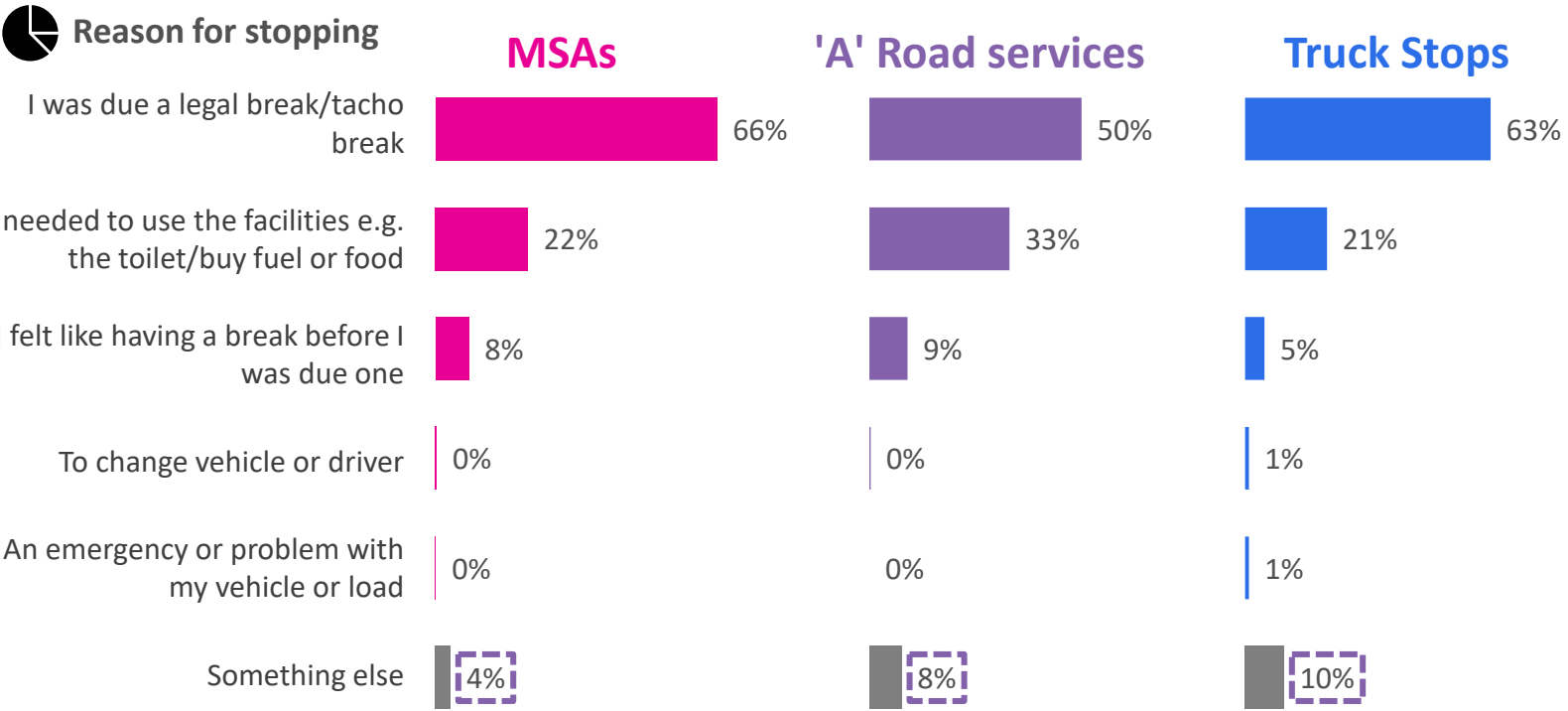
- **Somewhere quiet:** some services have midnight trailer changes or a lot of noisy refrigerated HGVs making sleep difficult.
- **Good opening hours:** some note that '24/7' often just refers to fuel, meaning early starters can't get breakfast before leaving.
- **Parking close to facilities:** so drivers can go to the toilet in the middle of the night easily.
- **More showers:** Often there are large queues, especially for the men, when waiting to take a shower in services.
- **Good security:** to allow drivers to relax instead of guard their vehicles.
- **Affordable parking:** specifically for those who's companies do not reimburse, or who have to claim on expenses at the end of the month.
- **Food:** for those who do not bring their own meals, healthier and affordable options are sought after.
- **Shaded parking:** for the summer months; cabs can get too hot to sleep in without this.

Many drivers were regular visitors to the sites we covered, slightly more so at Truck Stops and 'A' Road services than Motorway Service Areas

 Frequency of stops at particular site



The main reason for stopping across all sites is for a legally mandated break, followed by stopping for toilet/food/fuel



Qualitative reasons for stopping match the quantitative findings: lorry drivers primarily stop because they are legally obligated to do so. Other reasons identified amongst drivers complement the findings identified in the quantitative survey:

- ✓ For security reasons if there are concerns that a later stop would result in staying in a less secure area (e.g., a layby)
- ✓ To change a valuable load prior to an overnight stop
- ✓ To avoid an upcoming traffic jam (if a break is due within the next hour)
- ✓ When travelling past a particularly good stop.

Alternative reasons for stopping from the survey



"Change over of load"
Male, 35-44, MSA

"Secure overnight parking"
Male, 35-44, 'A' Road services

"Waiting on a job allocation"
Male, 45-54, 'A' Road services

"Its the closest to where I needed to be"
Male, 55-64, Truck Stop

"Close to tomorrow's delivery location"
Male, 35-44, Truck Stop



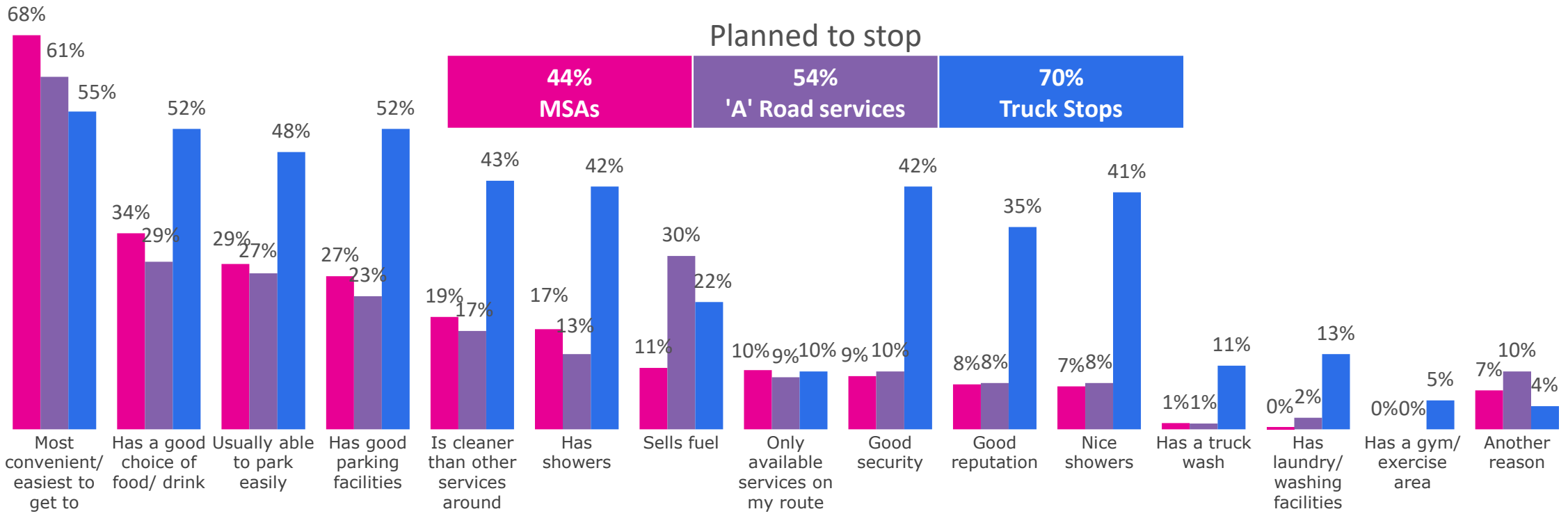
The diary entries largely match reasons for stopping by the main 3 types of site.

- Of the 181 stops at MSAs 11% were because they felt like it (significantly higher than average)
- Of the 30 stops at laybys 80% stopped for a legal/tacho break

The majority of drivers planned to stop at the site. Truck Stops appear a more considered choice, with Motorway Service Areas and 'A' Road service usage driven by an immediate need (convenience/fuel).

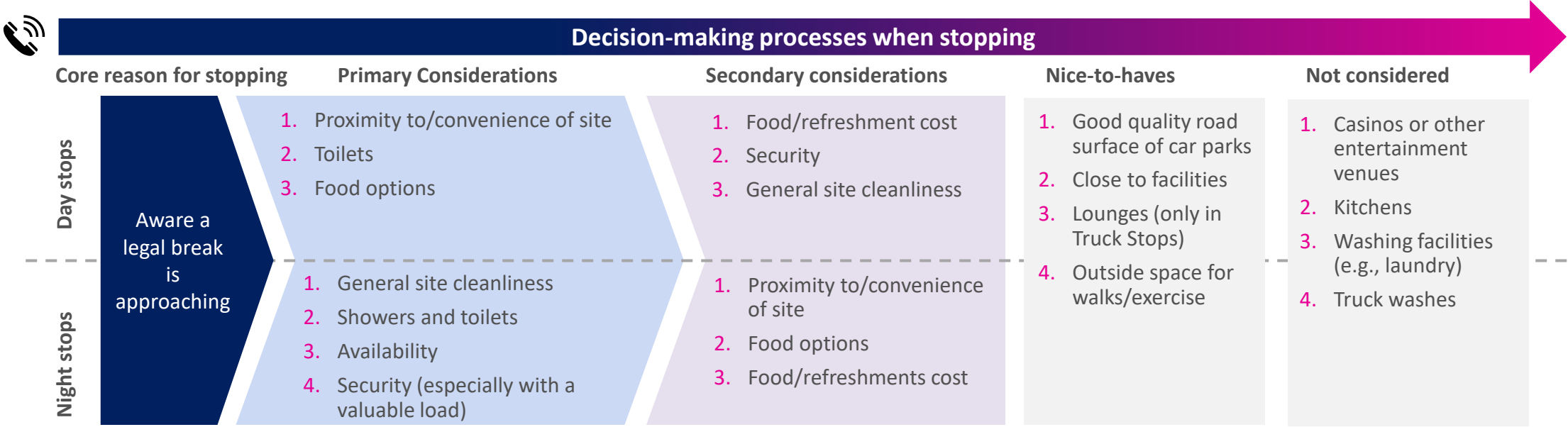
Reason for stopping at that particular site (among those who planned to stop)

59%



Qualitative interviews also show that a majority of drivers, when possible, prefer to plan their stops in advance with broadly similar considerations when doing so

The decision making processes for lorry drivers is well thought out. Findings show that most drivers **seek out stops that they are familiar with**, or that have a **good reputation within the industry**. Other considerations are highlighted below:



Other considerations can also differ depending on the nature of the individual's circumstances. For example:

- Cost was more important to those who had to pay upfront before being reimbursed and who did not have sufficient cash reserves for this to be an attractive option.
- Availability of parking was not often considered for day drivers, as there was a 'look and see' attitude; if parking wasn't available then they would just go to the nearest layby.

Actively avoided

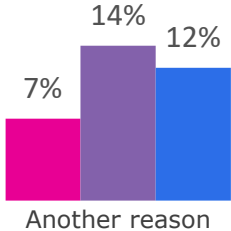
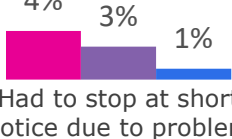
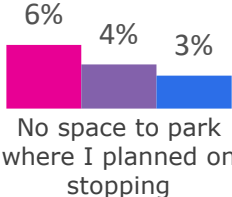
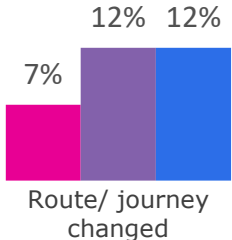
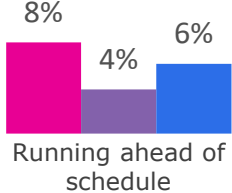
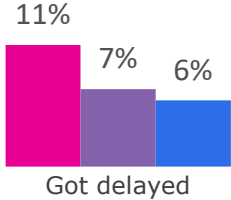
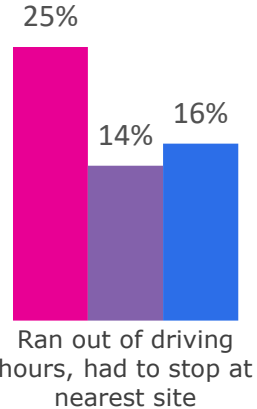
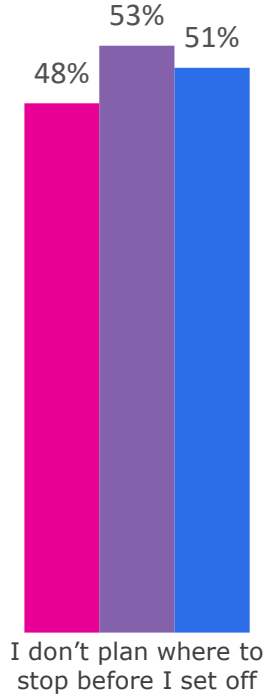
- Sites known to be rife with theft and with very little security measures
- Sites known to attract drivers who are perceived as less 'clean' (e.g., drivers urinating in lorry parks instead of using facilities)

Of those who didn't plan to stop, about half simply don't plan their stops. Unplanned stops were more likely at MSAs, with the need for a driving break more prevalent

Reason for stopping at that particular site (among those who didn't plan to stop)

41%

Didn't plan to stop



The split between planned and unplanned was more even in the diary survey (50% planned 50% unplanned):

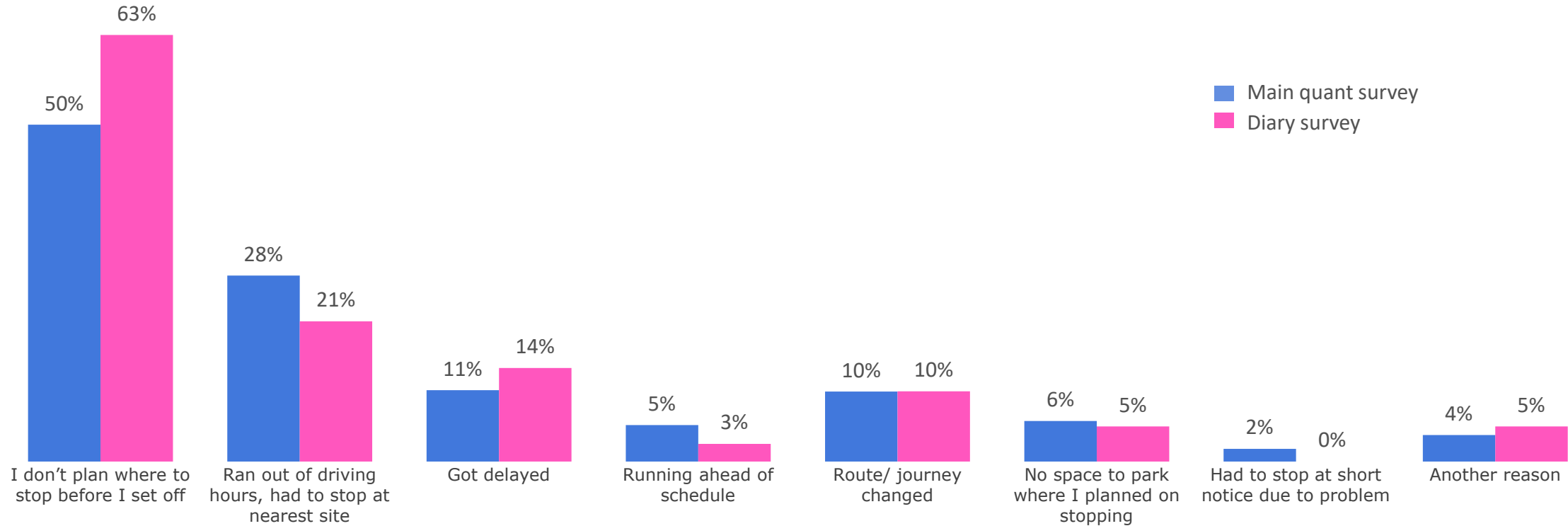
- When taking into account only MSAs, 'A' Road services and Truck Stops, 47% of stops were unplanned.
- Stops at laybys or industrial estates were significantly more likely to be unplanned (74% combined, 77% layby, 69% industrial estate)*

*Base size is below 50

The diary study found similar results to the main survey, as even among those who stopped for a legal break, running out of driving hours wasn't the main reason for most



Reason for stopping at that particular site (among those whose general reason for stopping was a legal break which was unplanned)



Findings from the qualitative interviews differed slightly; drivers said the main reason for an unplanned stop was running out of legal driving hours



Legal requirements drive the need to stop, and many drivers would be willing to keep driving to reach a more familiar place. The reason that they have not been able to find a familiar site *before* running out of driving hours is usually because of unforeseen circumstances along their route. This is broadly in line with the quantitative findings, and suggests that drivers prefer to continue rather than stopping prior to their legal breaks.

Core reason for stopping

Why ran out of hours/did not have planned stop in mind

Secondary reasons for stopping

I ran out of legal driving hours and could not reach my planned stop

I ran out of legal driving hours but did not have a planned stop in mind

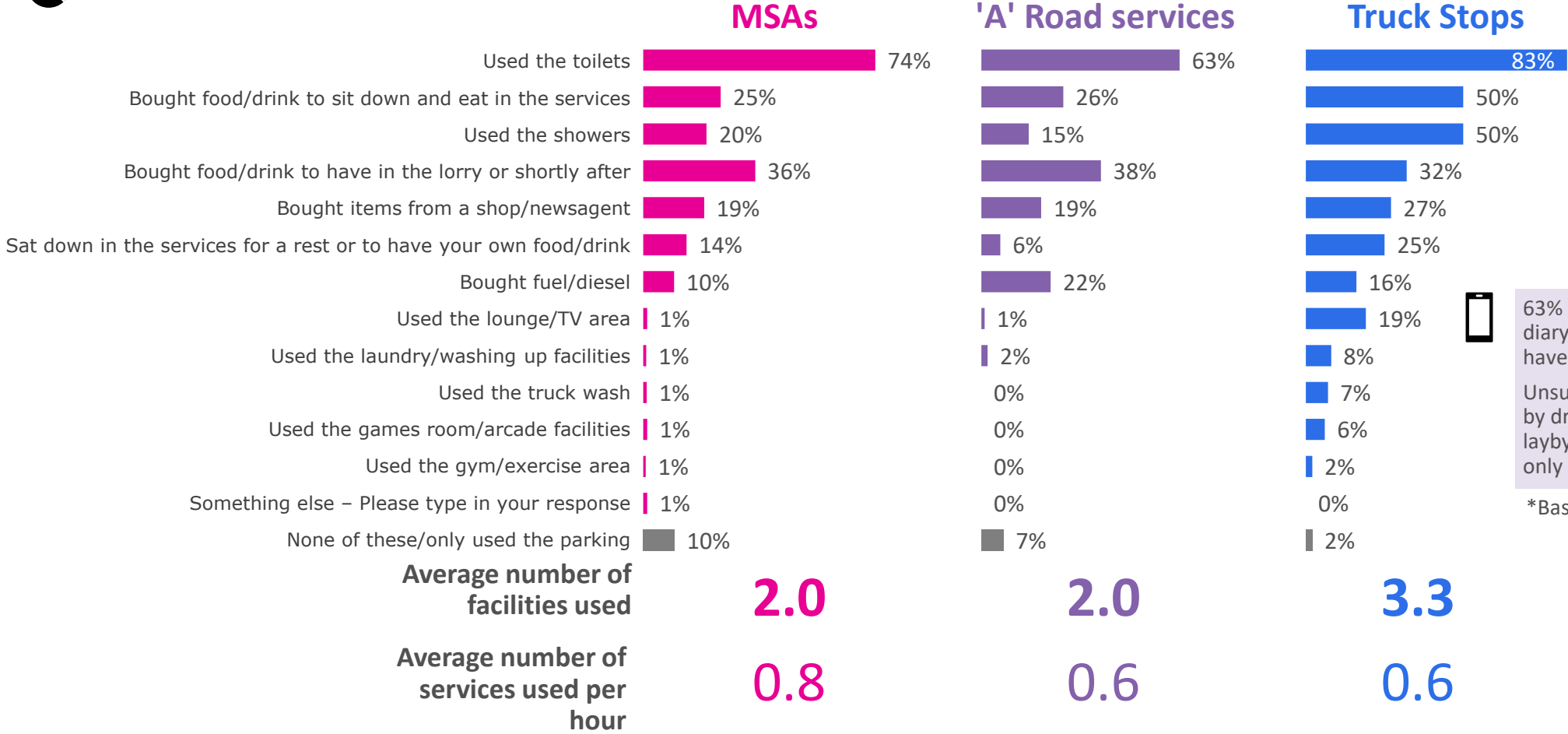
- Increased traffic on the roads usually results in drivers unable to reach their planned stop. High levels of traffic and collisions resulting in length traffic jams is usually the cause of this.
- Mistakes made with loading or unloading is another reason: sometimes drivers need to return to their bays because of a mix up, and must rectify this.
- Occasionally drivers cannot find parking and so must find the next best possible place to stop due to legal requirements. This is usually a ‘last resort’ option, with one driver commenting she had to stop on a hard shoulder once as a result of this.
- For some drivers, their route can change halfway through their shift, placing them on an unfamiliar route.
- Some drivers do not know their route, or have very changeable shift patterns, so do not plan stops in advance (though they usually do have favourite places in mind).
- New drivers are less familiar with their different routes, and the different stops available to them along the way. They are also less likely to have settled on their favourites. Therefore, they are generally less likely to have planned stops than those who have been driving a long time.
- A minority preferred not to plan their stops, although they often had favourites at the back of their mind, which they may have thought of subconsciously.

- Choosing to stop before reaching their legal limit in order to:
- ✓ Find parking at a popular place/their favourite stop;
 - ✓ Stop in a familiar place to them (usually one that is close to their homes so that they can see friends/family);
 - ✓ Stop in a town centre;
 - ✓ Prioritise stopping somewhere known for good security (in particular when carrying a valuable load).

Truck Stops have the highest average number of facilities used, although Motorway Service Area users use the most per hour; Truck Stops are alone in being more likely to see food/drink eaten in the services rather than in vehicles



What they did at the services



Several of the facilities in this question were not available at certain sites, especially MSAs and 'A' Road services



63% of the 38 'A' Road stops in the diary saw drivers buy food/drink to have in the lorry or shortly after*
 Unsurprisingly in 63% of the 46 trips by drivers who stopped at either laybys or industrial estates, drivers only used the parking*

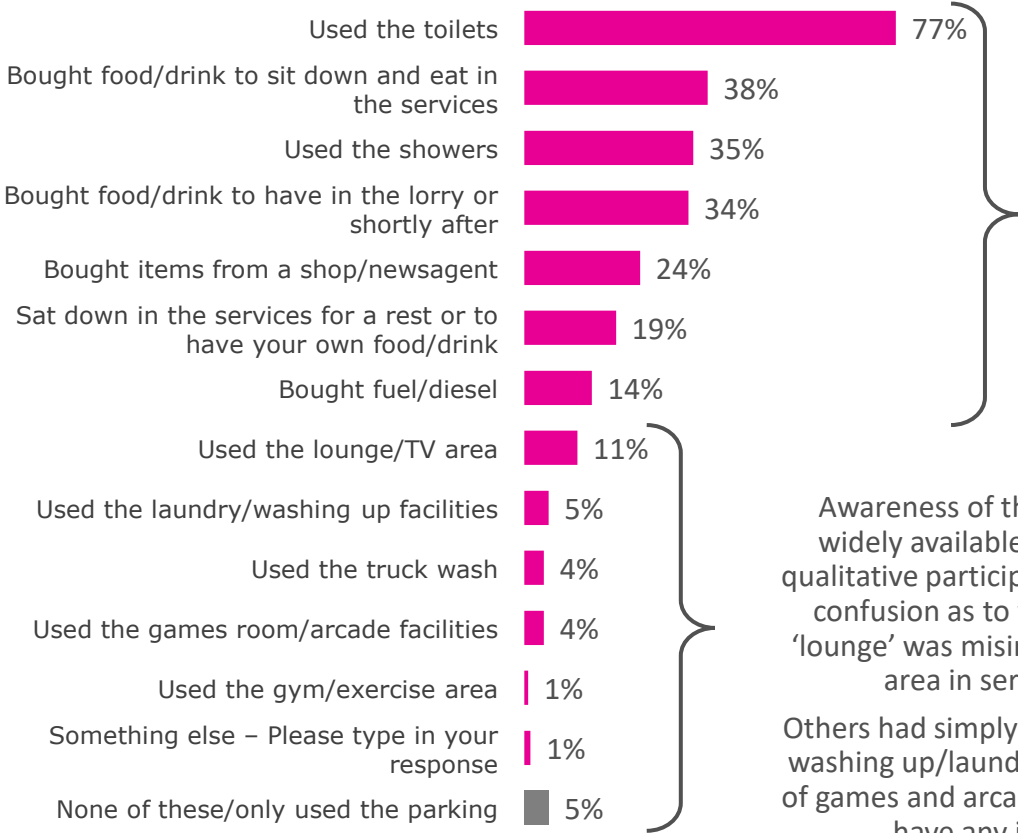
*Base size is below 50

Knowledge of facilities other than food and washrooms was low in qualitative interviews, and some drivers had never come across kitchen, lounge, or entertainment facilities

Drivers have very little knowledge of other services on offer, with very few having come across kitchen facilities, gyms, or driver lounges. Of those who have come across these services, they tend not to make use of them. Low awareness and low availability, alongside drivers having basic needs, is likely driving this, but that isn't to say drivers wouldn't use other services if they were more freely available.



What they did at the services (Total)



Awareness of these was high amongst qualitative participants.

Awareness of these lesser-used (and not as widely available) facilities was low amongst qualitative participants. In some cases, there was confusion as to what each term meant (e.g., 'lounge' was misinterpreted to mean the sitting area in service stations by many). Others had simply never come across them (e.g., washing up/laundry facilities). Most were aware of games and arcade rooms, but none claimed to have any interest in using them.



Though awareness of facilities is low, when queried whether or not drivers would use other facilities available to them, reception was mixed:

- Most agreed that they would use a gym or outside space more if it were available to them;
- Few were interested in a kitchen;
- Those wanting more social venues or entertainment spaces were also mixed, with a sway towards younger drivers looking for more of these spaces;
- Many were simply unsure of what they would use.

It may be prudent to develop lines of questioning around which services would be used in future waves of research.

"I'd love a little kitchen where I can go to, yeah! Just with the basics, you know. A hob and that. A bit like the ones you get in hostels. Yeah, I think I'd definitely use that."

There is a clear link between site security, reputation, and the quality of showers and the length of stay and the site they use

Sites with good security, nice showers, and a good reputation are more likely to be Truck Stops. Qualitative research shows that Truck Stops are generally a favourite for overnight stops, largely because of these three factors.




Qualitative interviews highlighted that good showers were an indicator to many of good facilities, as they were the hardest part to get right. Additionally, those using showers are more likely to be overnight drivers, so will have more time to use other facilities.



What they did at the services by reason for stopping



Security was identified as a core need during qualitative interviews, illustrating why a secure site was more likely to lead to lorry drivers using more facilities

 Good security was a core driver which led to lorry drivers stopping at services, especially for longer and overnight stops. Most drivers would rely on the reputation of sites within the industry to determine if a site was good or not, and one mentioned that his company had a 'black list' of services that they would not be allowed to stop at.

- **Vehicle security** was the core concern. Most drivers had experienced incidents where either their load (if curtain sided) or their fuel had been stolen. A core driver of anxiety for some was when they knew that their load was particularly valuable. When asked what groups of drivers security may be more of a concern for, drivers carrying a valuable load was the most common response. In some circumstances, companies wouldn't allow certain loads to be carried at weekends (e.g., alcohol was not carried on Friday or Saturday nights), and others would arrange a load-change to avoid a valuable load staying overnight at services.
- **Personal security** was less of a concern, even amongst women, with no drivers reporting feeling in personal danger when stopping at sites. Most, when queried, stated that they wouldn't be likely to be aware of a theft taking place but, if they were, would not put themselves in danger by confronting the thief.

High security did have an impact on how long a driver was willing to spend at facilities and away from their cab. For example, Truck Stops with high security saw drivers venturing out and enjoying their meals, whereas areas known for poor security saw drivers not leaving their cabs for fear of being seen as a target. Though they would not confront a thief, their presence in the cab was hoped to be a deterrent.

"A guy with a flashlight is going to put someone off. Or someone actually monitoring the cameras at night."

"Security guards? Parking attendants more like"

"I'm straight back to the cab at a services, you never know what'll happen if you turn your back for too long"

What makes a driver feel secure at services?

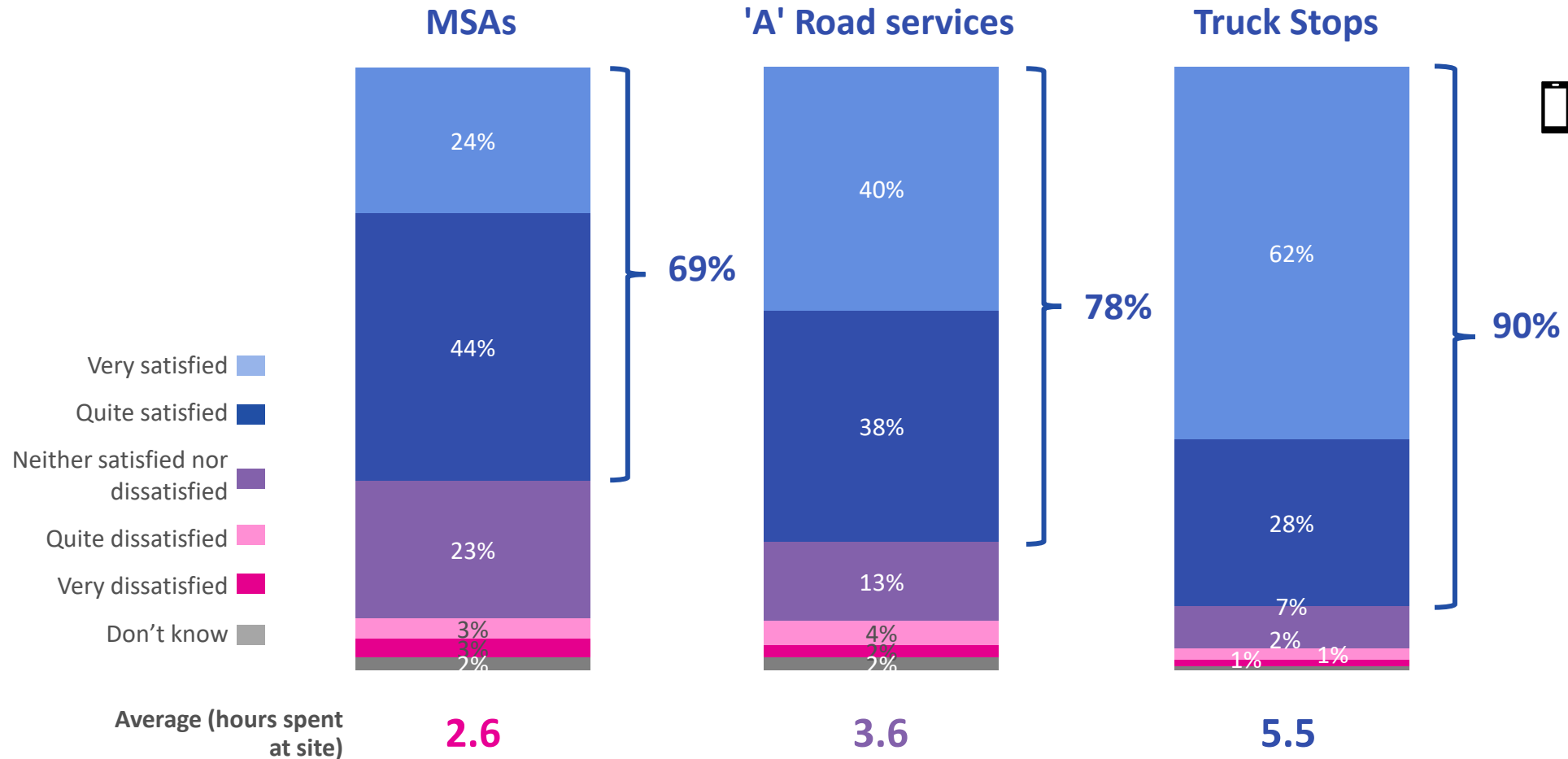
- ✓ Visible security cameras;
- ✓ Multi-angled security cameras;
- ✓ A good reputation (somewhere that hasn't had an incident of theft recently);
- ✓ Security guards patrolling;
- ✓ Security guards monitoring cameras throughout the night;
- ✓ Entry barriers;
- ✓ Natural barriers (i.e., high hedges);
- ✓ A 'check-in' gate at barriers, where drivers register when they enter the lorry park;
- ✓ Good lighting at night;
- ✓ Proof that a site takes security concerns seriously (i.e., a strong reporting service, or information on how sites are tackling theft).

One site was mentioned by a few as having a traveller site next door, and many avoided this location if they could due to high reports of theft.

Meeting Lorry Drivers' needs

Within the context of low driver expectations, satisfaction at individual sites is high overall – and highest at Truck Stops

Satisfaction with site overall



In 71% of the 38 'A' Road service stops, the driver was satisfied.*
 Satisfaction with stops at MSAs and Truck Stops mirrored the main quant survey closely (69% and 89% respectively).
 Even among the 46 stops by drivers who stopped at laybys or industrial estates, only 20% said they were dissatisfied. 52% said they were neither satisfied or dissatisfied.*

*Base size is below 50

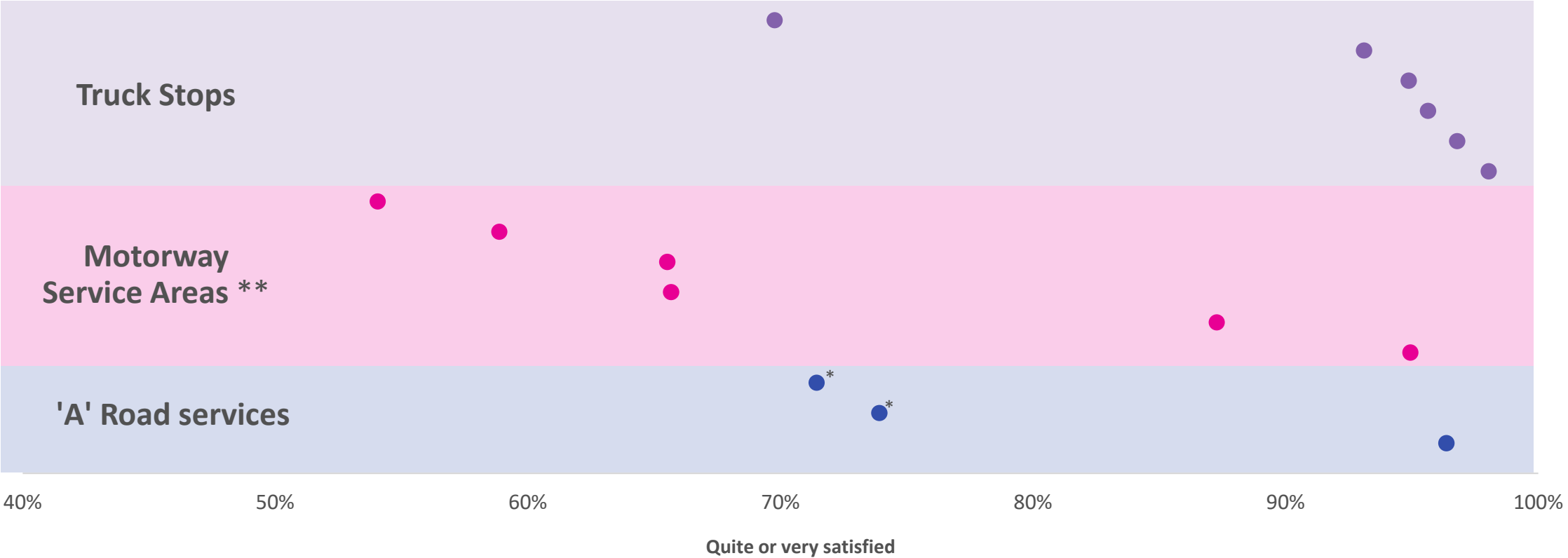
Average (hours spent at site)

Source: Q11. Overall how satisfied are/were you with your visit to this site today/on the day you were given this survey? Q9. Approximately, how long have you stayed/ did you stay at the site for (from first parking up to leaving)? Base: 1,797 Lorry drivers asked about their recent site visit (647 at MSAs, 201 at 'A' Road services, 949 at Truck Stops)

S8. Overall how satisfied were you with your visit to this site? Diary Base 38 stops at 'A' Road services, 181 at MSAs, 79 at Truck Stops, 46 at a layby or industrial estate

There was a wide range in satisfaction at MSAs included in the survey, while for the Truck Stops it was mostly very high

 Satisfaction with individual sites (anonimised)



*Sites with sample sizes below 30 are not shown, sites with small sample sizes (between 30 and 50) have been noted with an asterisk.

**The choice of Motorway Service Areas was influenced by aiming to cover sites with a range of scores from the most recent Motorway Services User Survey.

Truck Stops were also the preferred place to stop amongst qualitative participants; many noted a stark contrast in quality between Truck Stops and other services



What makes Truck Stops better*

- ✓ **Better security:** Truck Stops take security seriously. Many have multi-angled security cameras, electronic barriers, and security guards. Some even have 'high-value load' areas and female specific parking where security is heightened. There's also a general belief that because only lorry drivers use Truck Stops there's less likelihood of theft.
- ✓ **Welcoming atmosphere:** The independent nature of most Truck Stops mean that there is a personal touch. Staff often know drivers by name, and offer a warm welcome. Other lorry drivers using facilities also offer a chance to socialise.
- ✓ **Better washrooms:** toilets and showers are purpose made for drivers, and are generally much cleaner and better looked after as a result.
- ✓ **Parking proximity to facilities:** There are no car parking areas to navigate through to get to the facilities at Truck Stops, which is appreciated by many.
- ✓ **Better food options:** Food is considered '*more like food you make at home*'; and rarely offers fast food. However, some note the food is mass produced and microwaved, showing a need for improvement here too.
- ✓ **24/7 service:** Truck Stops are thought to be genuinely 24/7, rather than the claimed 24/7 that MSAs offer (when in reality, this is just fuel)

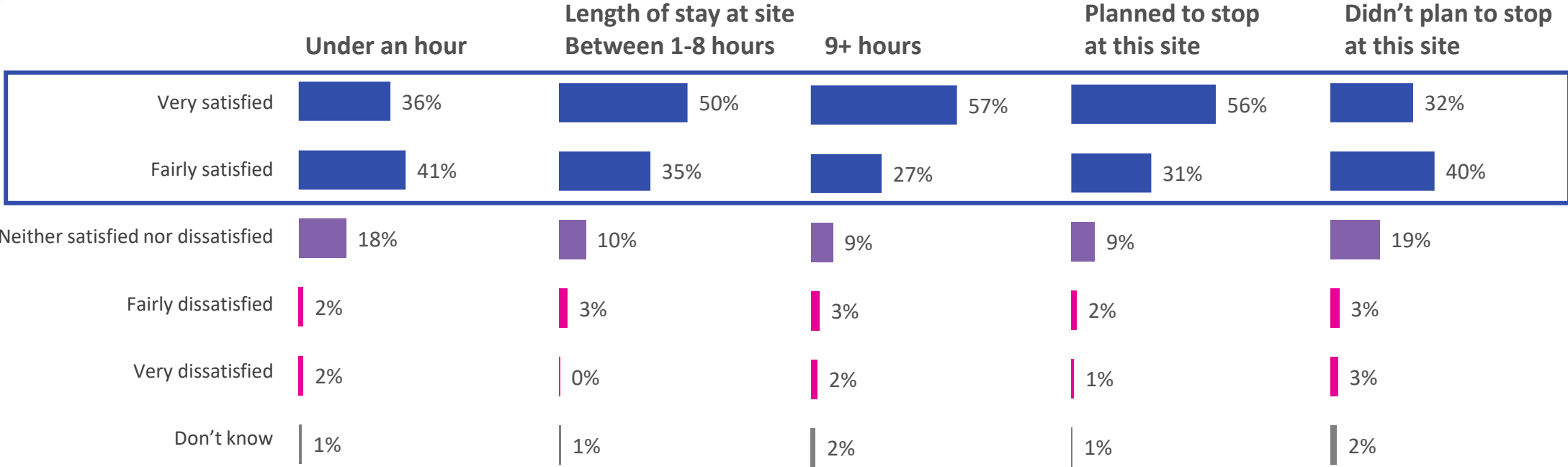
Availability is a limitation of Truck Stops. Drivers often have to call ahead to book a space, which isn't feasible for those with more flexible schedules. They are also few and far between, so can be hard to reach.

What makes MSAs and 'A' Road services worse*

- ✓ **Worse security:** A perception that anyone can enter lorry parks, and the proximity to motorways means that thieves can 'make a quick get away'. Security is thought to be largely lacking, with no guards or cameras.
- ✓ **Unwelcoming atmosphere:** Staff in these services are generally thought to be rude and unwelcoming to everyone.
- ✓ **Closed facilities:** Some complained that, when leaving early, facilities were closed meaning it wasn't possible to buy a breakfast before heading off.
- ✓ **Parking:** Costly, full, and far from services. Parking at 'A' Road services were also not fit for purpose, with many avoiding them, even for short breaks, for fear of being blocked in.
- ✓ **Food options:** Almost unanimously, drivers complained that junk food was the only thing on offer; this was particularly poor for lunch options as some couldn't concentrate on driving after eating such a heavy and unhealthy meal. Some skipped eating altogether, instead of eating McDonalds or a KFC.
- ✓ **Cost:** Where other food options were mentioned, they were thought outrageously expensive. It was thought that some things, such as water or tea/coffee, should be free to drivers.
- ✓ **Volume of people:** Particularly in the summer months, the amount of people at services made parking and using facilities difficult, eating in to break times for drivers.

Very few lorry drivers say they are dissatisfied; the majority of variation is between those very satisfied and those fairly satisfied with their site experience


Satisfaction with site overall



Qualitative interviews suggest that the reason for low rates of dissatisfaction could be because:

- 1) Lorry drivers do not have high expectations, and do not go into driving believing it will be a luxurious lifestyle, so a service needs to be *really* bad before a driver is actively dissatisfied with it.
- 2) Those who are dissatisfied and disillusioned with services overall are seeking out alternative places to stop on a regular basis instead;
- 3) Many choose sites that they actively like;

Interviews found that most drivers are, however, dissatisfied with their experiences at distribution centres, driven by poor facilities and non-welcoming staff

 As well as an evaluation of services, qualitative interviews also asked drivers to reflect on their experiences at distribution centres. Generally speaking, the perception of these distribution centres was negative, for the following reasons:

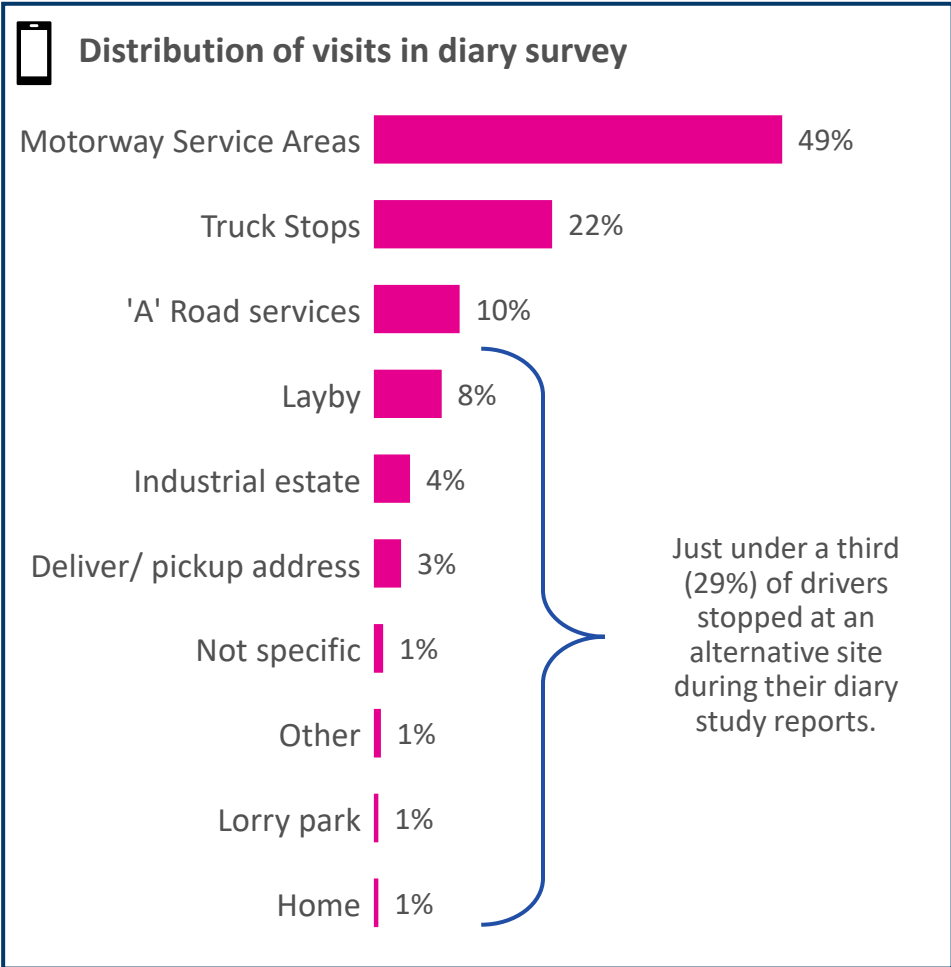
Reasons behind poor experiences at distribution centres

Access to facilities	A core complaint was that facilities for distribution centre workers were not available to drivers; many had to use separate facilities, which were often far away from their bays. Additionally, during Covid, these facilities were closed to drivers creating further discontentment.
Quality of facilities	The quality of facilities for drivers was perceived to be worse than the facilities available for distribution centre workers. Toilets were not always clean, and prices for refreshments (especially tea and coffee) were sometimes more expensive than for centre staff.
Waiting times	Many drivers mentioned long waiting times, where they were expected to arrive on time (and sometimes denied entry if they did not), but were not approached by centre staff for hours.
Non-welcoming staff	Some staff at distribution centres were thought to be unwelcoming and intentionally unhelpful to drivers. There is a ‘them’ and ‘us’ attitude, with a couple referring to centre staff as ‘jobsworths.’
Inflexibility of timings	Where drivers are running late or have been held up, some centres lack empathy and will refuse to take their load. This was a source of frustration for some.

- However, despite most drivers stating that they were dissatisfied with experiences at distribution centres, most mentioned that they had also had a positive experience.
- Positive experiences tend to be centred on two or three stand out companies who operate distribution warehouses*.
- These differences are based on the companies operating the warehouses, rather than geographical location, or the time of day the driver arrives. Positive experiences are associated with a company rather than specific site location
- The reason for this is likely company policy, rather than other factors that distribution centres may experience.

“Lidl is like clockwork! You’re in and out in minutes.”

Drivers who are dissatisfied with services more generally will try and find 'non standard' alternatives to stop at, such as laybys and industrial estates



Qualitative research indicates a number of reasons why a third of drivers may be stopping at alternative places. These fall into three categories:

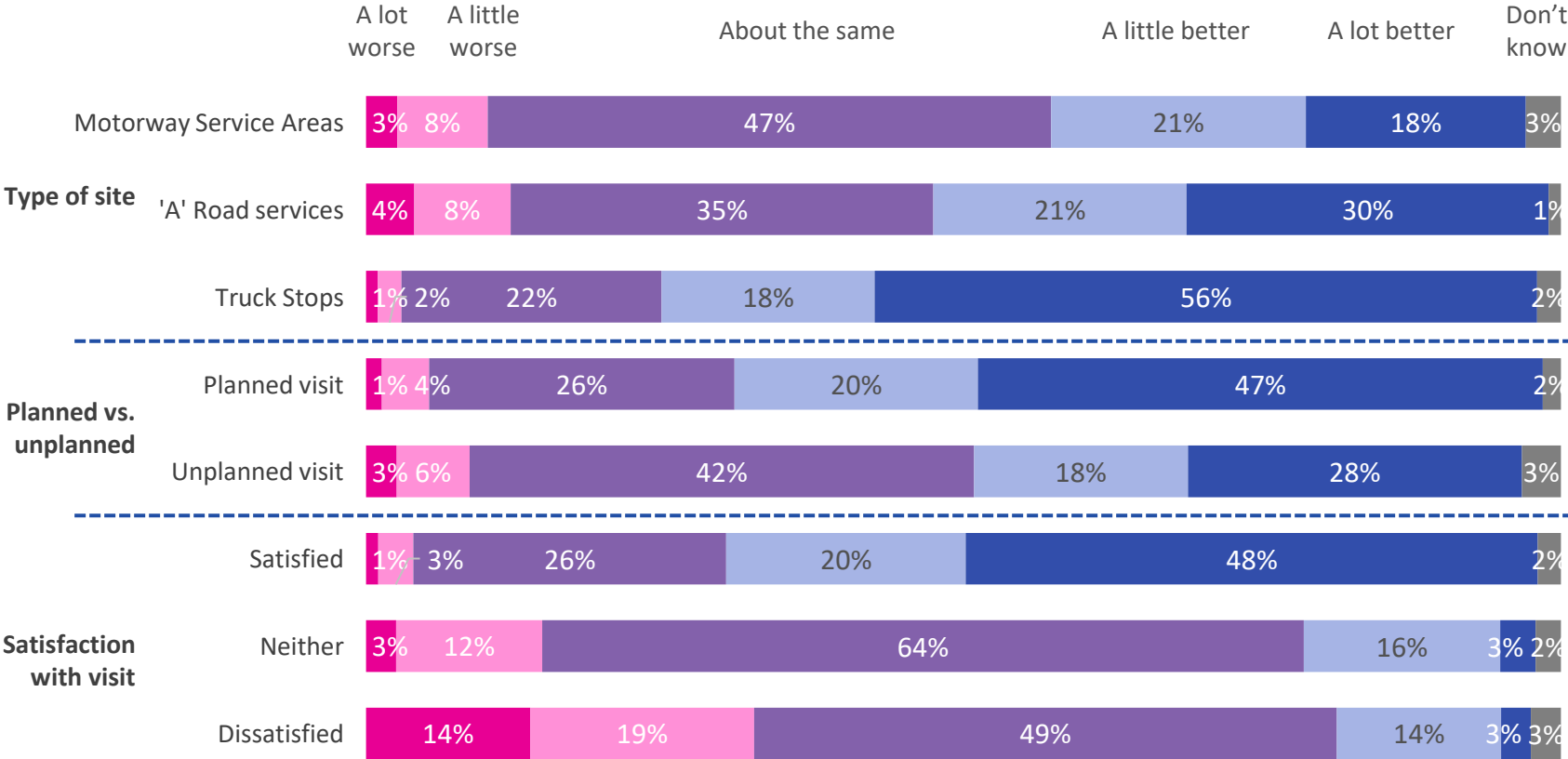
- Necessity:** Usually, when drivers cannot find parking at a formal location, they will have to stop elsewhere. They often find a layby, but some will also park on industrial estates or in town centres. This is particularly the case amongst those who have to pay for their own parking or facilities. Some companies mandate that their drivers cannot stop at these alternative sites if they deem security to be inadequate, however. As a result, some are starting to make their yards more accessible to address lack of security, accessibility, and high parking prices.
- Choice:** Some drivers actively choose laybys and industrial estates for overnight stops due to the expense of parking. They do not mind the lack of facilities and are happy to urinate outside if it means they can save on cost. They will bring their own food and avoid services where possible. Some who choose industrial estates remarked that they are becoming more difficult to access, as estate management are painting double yellow lines to stop lorry drivers parking there.
- Opportunity:** For some, they may plan to use a traditional service but will spot a better alternative on their route. For example, they may note that they are close to their home so choose a small detour, or will drive past a more residential or urban area and decide to park there instead, so they can make use of eateries in town centres.

"I like to go into town centres, maybe find a Waitrose or Sainsbury's car park or something, and spend the night there. It's free, and I can get a good meal at a nice local restaurant or pub."

"If I'm close to home, I can park up somewhere like a layby and my wife can come and pick me up and I can spend the night at home. So if that's an option then I'll try to do it."

Those who planned their stop, and those at Truck Stops, are more likely to say their site was better than other roadside facilities in the UK

Comparison with other sites they visit



Qualitative interviews showed that lorry drivers prefer to stop in a location they know and like; therefore a selection bias may also be driving higher levels of satisfaction.

Drivers choose to stop in locations usually due to two factors: familiarity and a good reputation.

- **Familiarity:** drivers, even the ones who don't tend to plan their stops, have favourites in mind. If given the choice, they will revisit a site they know and have had a relatively good experience with, rather than try a new location. Unless it has...
- **A good reputation:** A site with a good reputation is likely to be visited by many as word of mouth is a powerful tool. Equally, drivers try to avoid those with a bad reputation.

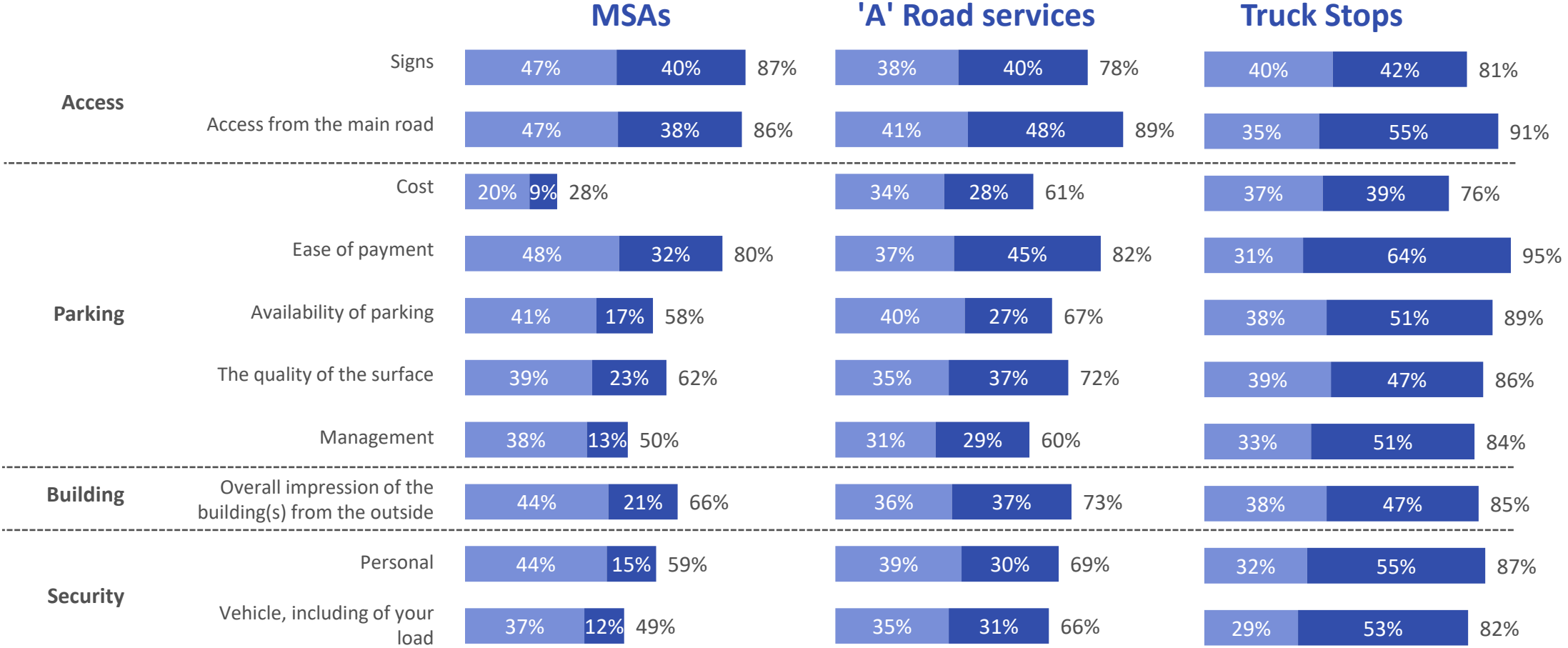
Though drivers try to avoid sites with a poor reputation, this isn't always possible. Often, a lack of parking or a legal break means drivers must stop, regardless of preference.

The cost of parking at MSAs stands out as the aspect with which drivers are least likely to say they are satisfied



Satisfaction with individual parts of the site

Fairly good
Very good



Source: Q12. [All valid] Still thinking about your visit to the site where you were given this survey, please rate the following using the scale below
Base: Floating base of where lorry drivers used type of facilities

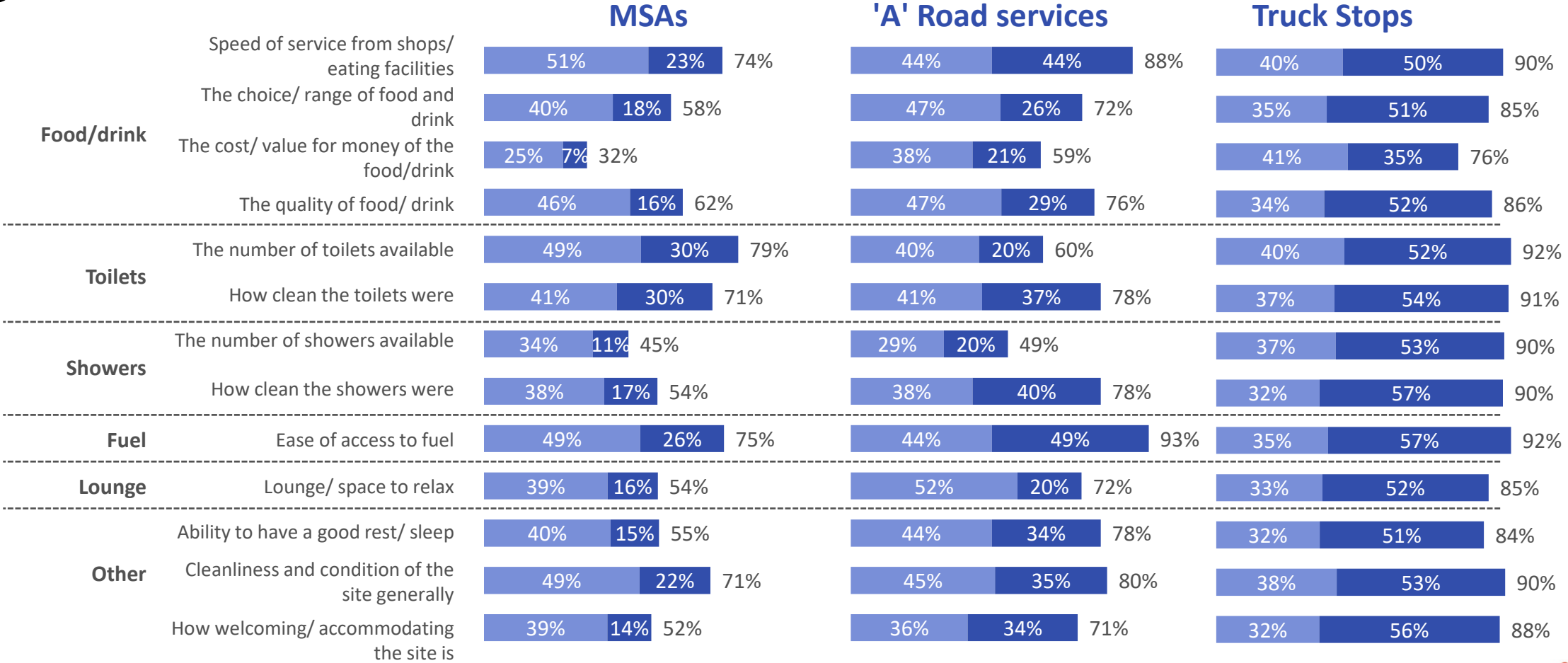


Satisfaction is very high across most facilities at Truck Stops, while at Motorway Service Areas few drivers are satisfied with the cost of food/drink



Satisfaction with individual parts of the site

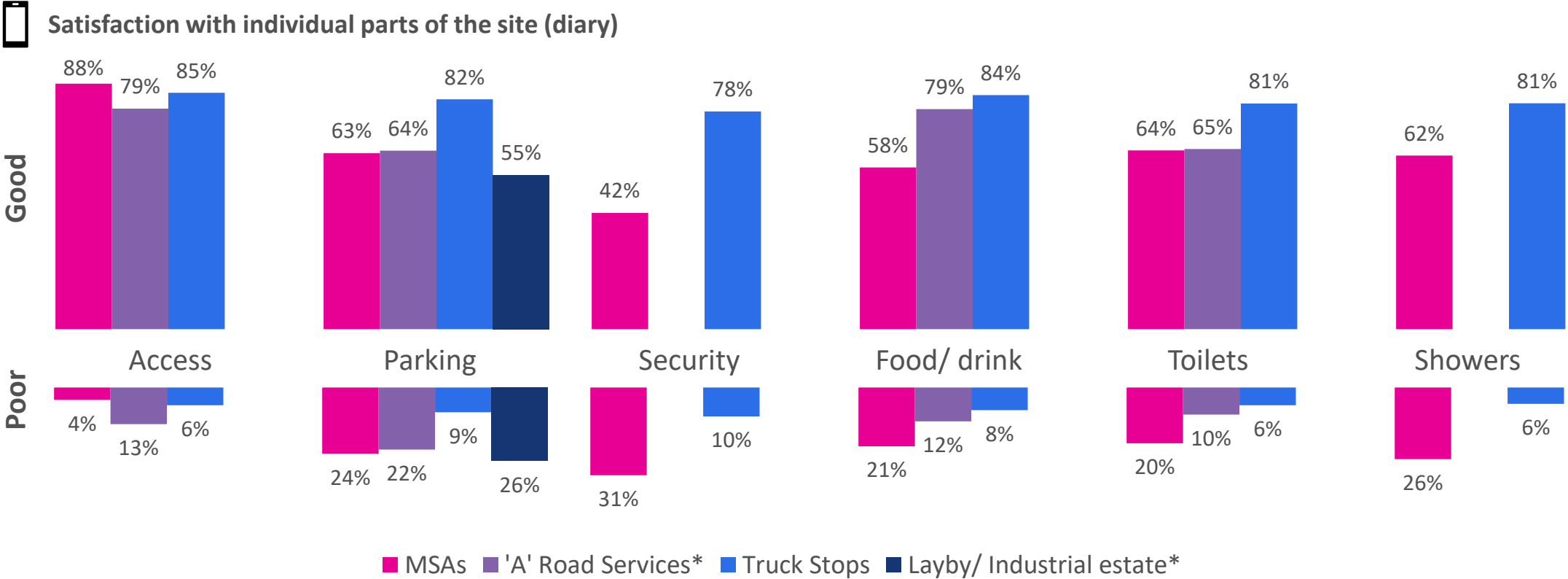
Fairly good
Very good



Source: Q12. [All valid] Still thinking about your visit to the site where you were given this survey, please rate the following using the scale below
Base: Floating base of where lorry drivers used type of facilities



In the diary survey, Truck Stops again outperformed the other types of site across individual aspects, apart from access



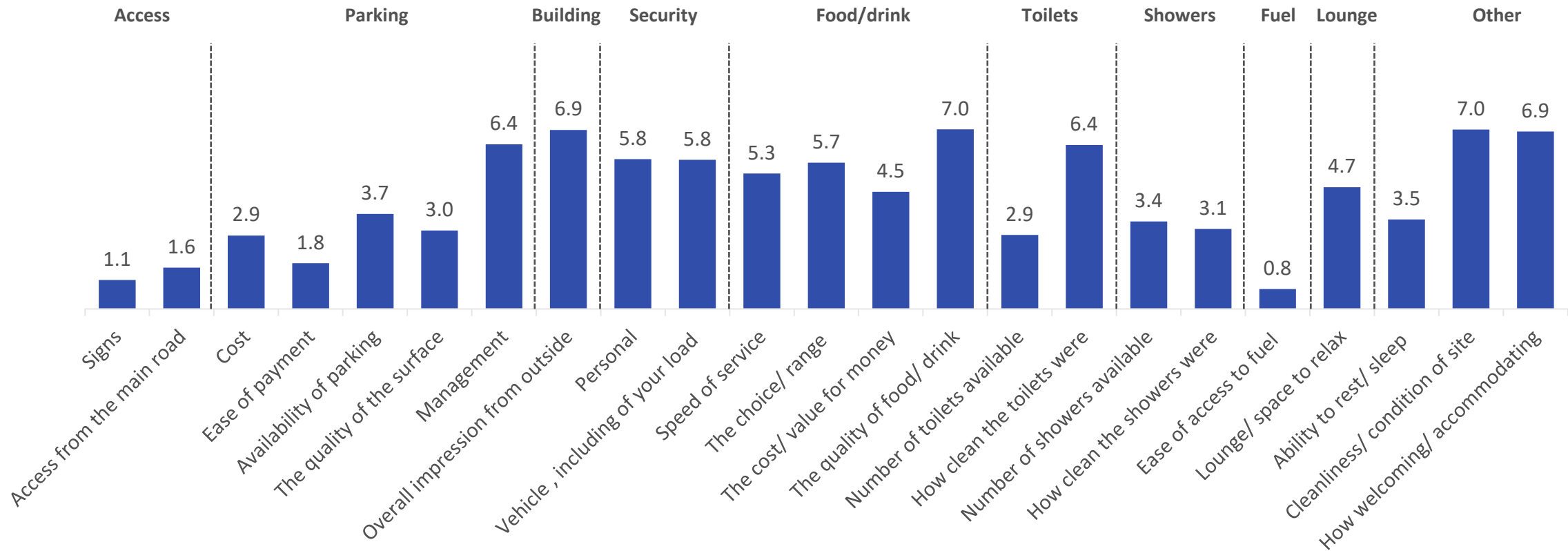
*Base size is between 30 and 50 for all so should be considered indicative

Where data is not shown for laybys/ industrial estates or 'A' Road services, the base size was 30 or below; not robust enough to report on

Overall, the biggest drivers of satisfaction are the quality of food/ drink, the cleanliness/ condition, the overall impression of a site and how welcoming/ accommodating it is



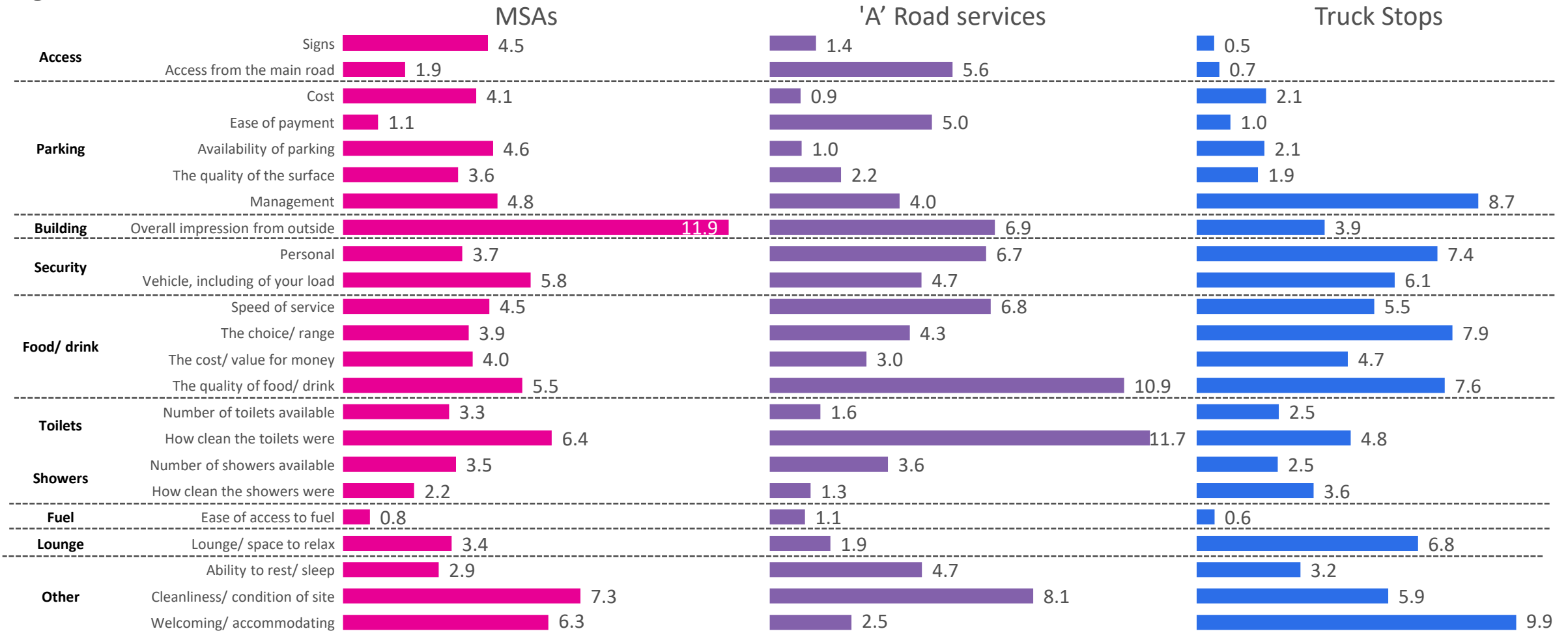
Relative importance of available facilities (% impact on overall satisfaction)




Drivers of satisfaction levels differ by type of site; a welcoming atmosphere drives satisfaction at Truck Stops, while at MSAs a good overall impression is important



Relative importance of available facilities (% impact on overall satisfaction)



Qualitative drivers of satisfaction largely match those identified in the main survey, but value for money and a welcoming atmosphere were less commonly mentioned

 <p>Equally important drivers of satisfaction</p>	Food	<ul style="list-style-type: none"> Both the range and the quality of food on offer impacted satisfaction. In particular healthier (i.e. homecooked and not too carb-heavy), hot options, were favourably viewed.
	Parking	<ul style="list-style-type: none"> Management (e.g., stopping caravans and coaches using it) is a key driver of satisfaction because it increased parking availability. In line with this, availability of parking spaces is also a key driver of satisfaction with services.
	Security	<ul style="list-style-type: none"> Vehicle security is important because thefts are seen as prevalent. Sites thought to be combatting this were thought to be on the driver's side therefore leading to higher satisfaction. Contrasting with the main survey, personal security was not noted except in the context of theft, which was always linked to vehicle and load.
	Toilets and Showers	<ul style="list-style-type: none"> Drivers prefer to use clean washrooms, so cleanliness was a core driver of satisfaction. Toilets and showers were often thought of as an indicator of overall cleanliness of the site, so a clean bathroom facility often led to satisfaction with general cleanliness too.
<p>Less commonly mentioned</p>	Value for money	<ul style="list-style-type: none"> For food and parking; this was more linked to feeling valued, as drivers do not think they should be paying premium prices for facilities and food.
	Other	<ul style="list-style-type: none"> Ability to sleep, resulting usually from how quiet the site is. A welcoming nature was a 'nice to have' mentioned by some. It appears to have a big impact on satisfaction, but is not at the forefront of drivers' minds as being important. The feeling of being valued was also noted, with sites specifically catering to lorry drivers leaving them feeling more satisfied

Not mentioned

- In line with quantitative findings, access, signage, ease of payment, and fuel were not important drivers of satisfaction.
- Lounge areas/spaces to relax and speed of service was not noted in the qualitative phase, despite showing relative importance during the main survey.
- Outside impression was not mentioned.

Interviews suggested a variety of reasons why security, food, parking, and site cleanliness were the more important aspects for drivers



Security

Vehicle security is becoming more and more important and drivers believe that the cost of living crisis will result in more thefts. Though drivers do not feel that their employers hold them accountable for the security of their vehicle, it does leave drivers feeling more exasperated and disillusioned with the job.

MSAs are found to be the least secure; this is because the location of MSAs mean that thieves can drive away quickly down a motorway, whereas Truck Stops and 'A' Road services are often harder to exit quickly. Additionally MSAs tend to be larger, therefore have more people coming and going, meaning thieves are able to go unnoticed.

Parking

There is a perception that there isn't enough parking in general, but this doesn't tend to impact site satisfaction, as once a driver has a parking space, they tend to be satisfied with it. (For the main survey, drivers could not use the site without a parking space, so we could not assess their satisfaction.)

Most drivers are aware of which sites have good parking and where they will struggle to stop past a certain hour; they are adaptable and plan their routes based on this knowledge.

However, better site management for parking would be seen as beneficial. For example, splitting areas into 'quiet' and 'loud' so drivers can sleep well, not allowing non-HGV drivers (e.g. caravans to use spaces), and improving surface quality and the cost of parking would all lead to higher satisfaction with parking.

Healthy Food Options

Drivers (notably the newer and usually, therefore, younger ones) are quite health-conscious, and many state lorry driving is quite a sedentary job. Many newer drivers entered the position from a more manual occupation, such as bricklaying, and so are not accustomed to the lack of exercise.

As a result, unhealthy food choices (predominantly fast food) lead to dissatisfaction. Drivers have three choices: accept unhealthy food, make their own food (with hot food not always an option), or go without. For those on longer trips, this issue is more important as the longer they are away, the less likely they are carry their own food.

Generally speaking, drivers want hot, homecooked meals, which will fill them up but do not cause them to be drowsy. Currently, this need is not seen to be met.

Site Cleanliness

Cleanliness and the number of toilets available are core drivers of satisfaction, but for the most part respondents thought they were in good condition. The exception to this was for 'A' Road services, at which drivers felt that toilets were often closed, there were fewer of them, and they were not as clean.

Showers, especially amongst male drivers, were not sufficient at most sites. Female drivers did not have to queue for as long when separate facilities were available. Additionally, the cost of showers was often begrudged (many believe they should be free), and some respondents commented that the water temperature could be temperamental. Most had had to persevere with cold water, especially if arriving later than the 'rush'.

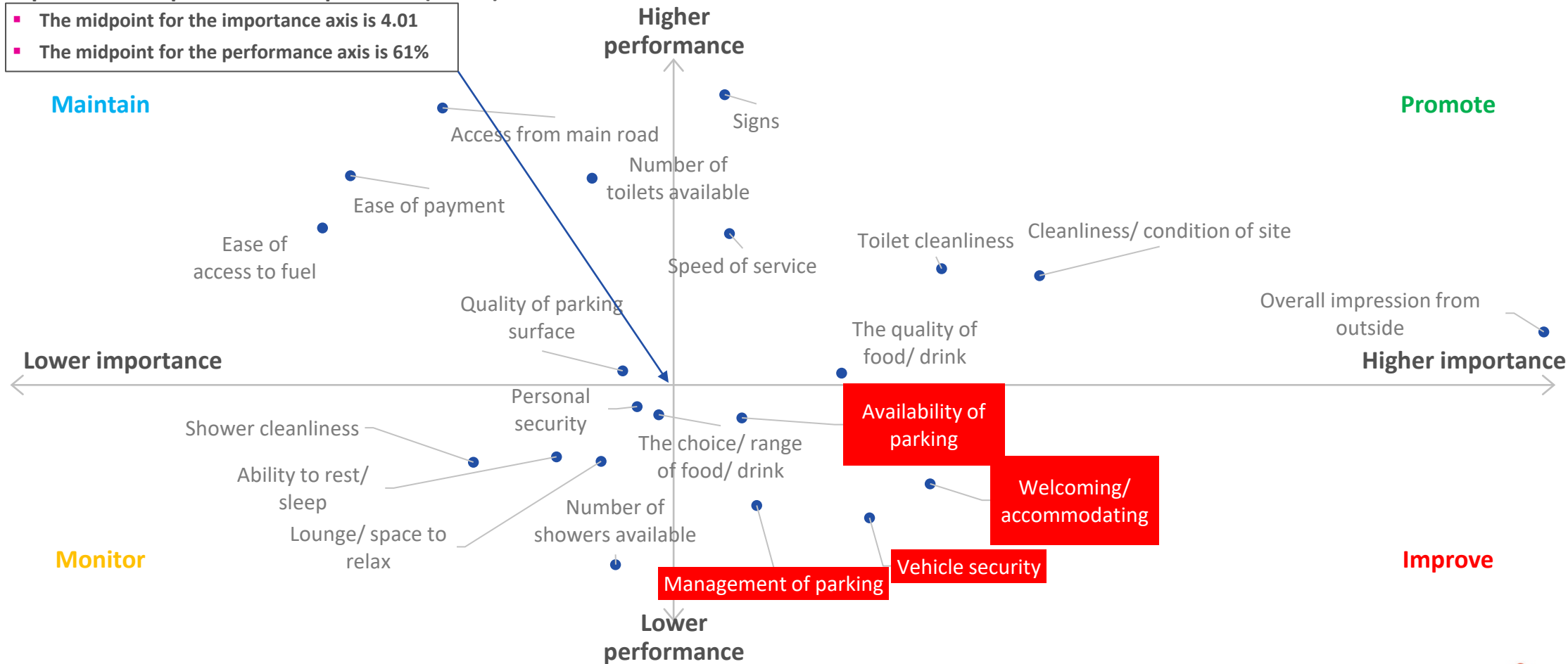
Where should improvements be prioritised?

Parking, a welcoming atmosphere and vehicle security are the priority areas for improvement for Motorway Service Areas, but others should still be considered given an average performance score of 61 per cent



Importance vs. performance quadrant (MSAs)

- The midpoint for the importance axis is 4.01
- The midpoint for the performance axis is 61%

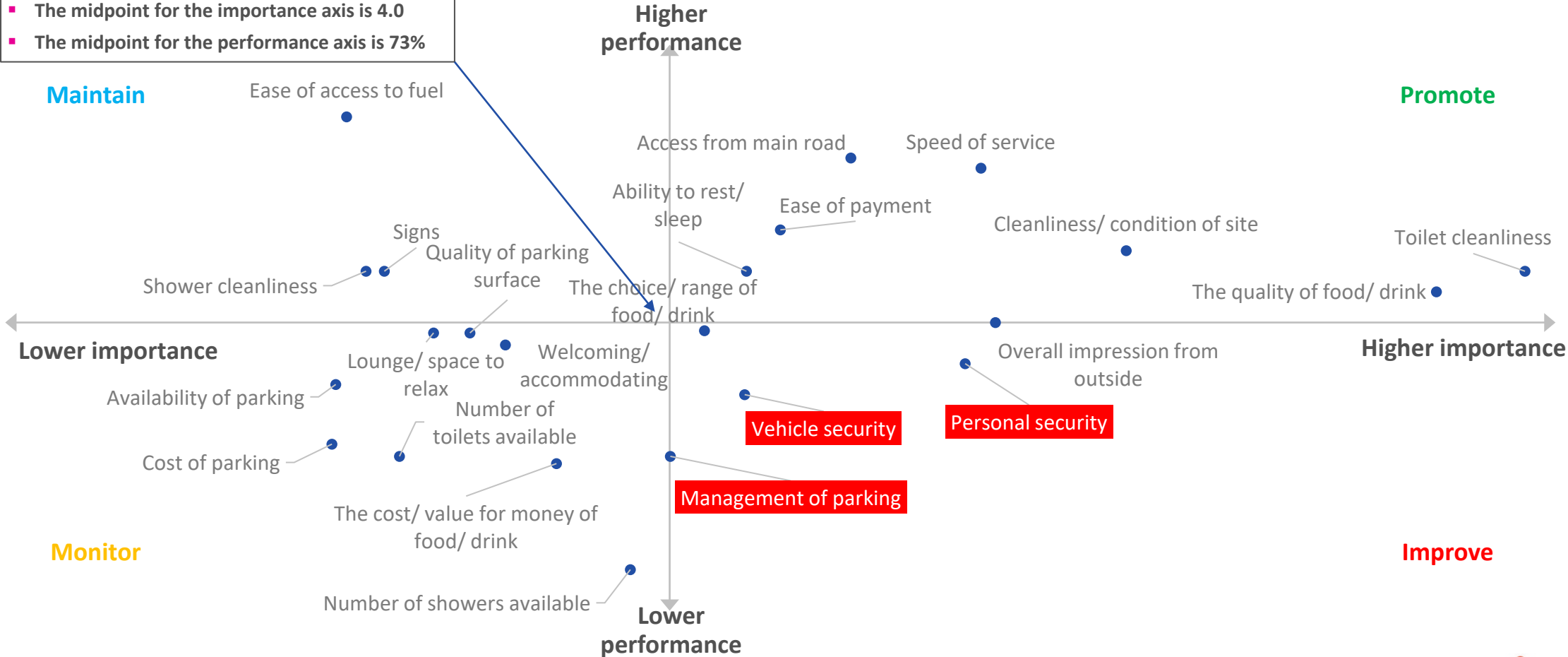


Security and management of parking are the priority areas to improve for 'A' Road services, but others should still be considered given an average performance score of 73 per cent

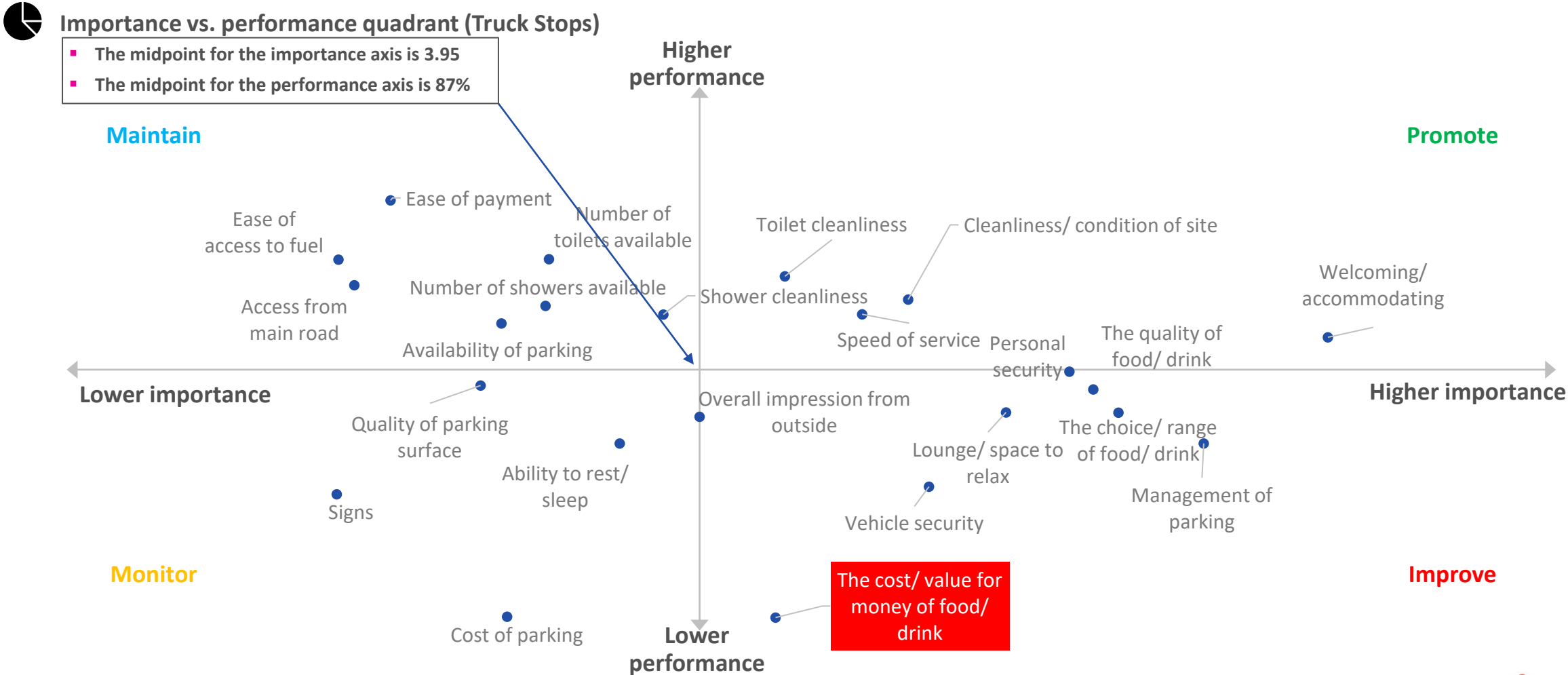


Importance vs. performance quadrant ('A' Road services)

- The midpoint for the importance axis is 4.0
- The midpoint for the performance axis is 73%



To the extent that any improvements need to be made to Truck Stops, given an average performance score of 87 per cent, they are around the cost of food and drink



The research involved 4 phases

Pre-design phase: Qualitative Research undertaken by Transport Focus

- Qualitative research undertaken by Transport Focus fed into survey design and topic coverage
- Review of pre-existing research and information undertaken by Transport Focus:
 - Take a break – Road users' views about roadside facilities (2016)
 - 'A' Road services: What users of the A3 and A34 think (2018)
 - Logistics and Coach Survey: Strategic Roads (2020/21)
 - Motorway Services User Survey (2020)

Phase 1: Initial cognitive testing phase to support design of questionnaire and approach

- Five** cognitive interviews
- Covered Motorway Service Area and a Truck Stop, testing both the survey mechanics, and the survey content
- Interviews undertaken by our research team using same approaches as would be used in Phase 2 survey to ensure comparability
- £30 incentive for each participant

Phase 2: Quantitative survey to measure lorry driver experiences of site facilities

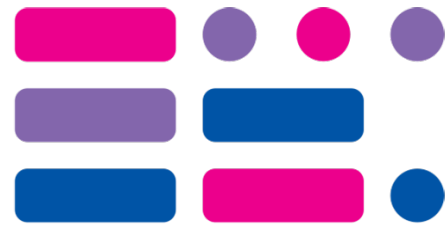
- Intercept approach – interviewers positioned between facilities and lorry parking
- Drivers intercepted as they leave facilities to return to vehicle to ensure they have used facilities
- Survey offered in 6 languages (English, Polish, Romanian, Russian, Bulgarian, Hungarian)
- Different incentives offered on different days to test impact:
 - None
 - Cash incentive (£5/£10)
 - Voucher (£5/£10)
- 10 minute questionnaire focused on that specific experience
- Drivers offered choice of completion modes:
 - Self-completion on interviewer device (CASI)
 - Paper survey to complete and return via pre-paid post
 - Card containing survey link & QR code
 - Register email address or mobile telephone number for email invite / SMS with survey link
- Interviewers record number of refusals and acceptances to identify 'response'/'participation' rate
- Contact details and permissions collected for recruitment to Phases 3 and 4

Phase 3: Qualitative phase to enable exploration of results in more detail and depth

- 20 drivers recruited from Phase 2.
- Recruitment based on responses and profile from Phase 2
- Telephone / video depth interviews – 30-45 mins
 - Remote individual approach to allow for drivers being geographically distributed
- £30 incentive for participation

Phase 4: 'On the ground' feedback – a semi-continuous survey across all sites they use

- Drivers recruited from Phase 2 to participate in week long feedback exercise.
- Target of 120 contributing drivers
- Drivers incentivised to use 5 minute survey to feedback their experiences for up to 5 days
 - Submit responses to questions and photos using an app
- Drivers rewarded for completion:
 - £5 per day/24-hour period they complete, up to a maximum of £25



BMG

success decoded