



Lorry Drivers' Facilities Research: – Technical Report from Pilot Study March 2022

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Executive Summary

Key questions to address:

How do we gather feedback from a robust cross-section of lorry drivers about their experiences of roadside facilities?

What approaches are effective at producing...?

- Strong response rate
- Coverage of different site types (including Motorways Service Areas (MSAs), 'A' Road services and Truck Stops)
- Coverage of different driver types and nationalities
- High quality data

How can feedback approaches be optimised?

- What incentivisation should be used?
- Are multiple languages required?
- What times of day/day of week should interviewing use?

How effective were survey materials?

- Did the questionnaires/topic guides perform as hoped?
- Any areas for improvement?

What approach, or combination of approaches, is recommended for future tracking research?

Key findings

What approaches are effective...?

- The face to face intercept approach was highly effective with a strong response/participation rate for immediate survey completion.
- The core self completion on site approach worked well. The alternative options e.g. paper, QR code, did generate additional response, but in limited numbers.
- This approach was effective at all types of site where there is sufficient 'footfall' for intercepts to work.
- It is possible to reach significant numbers of non-UK nationals through the intercept approach – with the multiple languages offered enabling this.
- Drivers are willing to provide continuous feedback through the 'On the Ground' self-completion app. However. This largely brought more MSA and Truck Stop ratings rather than significantly increasing the coverage of the survey into laybys, industrial parks etc.
- Drivers are willing to participate in qualitative research and the initial intercept survey was an effective mechanism for accessing drivers for this.
- Data quality was high – reinforcing that the approaches used work.

How can feedback approaches be optimised?

- The level of footfall is the biggest driver of interview achievement. Any future programme needs to take this into account when identifying the sites to include and the number of shifts required.
- The lower footfall outside of MSAs and Truck Stops means it will be difficult to generate robust base sizes for individual sites outside of these.
- Drivers are willing to participate in research and value the opportunity to share their feelings and perceptions.
- This includes where there is no financial incentive.
- Participation is higher when an incentive is offered however, and it is advisable to continue to do so in future.
- A £5 cash incentive is sufficient for an intercept interview – with little benefit from increasing the value.
- Making the survey available in multiple languages (English, Polish, Romanian, Russian, Bulgarian and Hungarian) is effective in enabling inclusion of non-English native speakers.
- Driver profiles differ by day of the week and by time of day – though all days and all times were productive. A future programme should include a mix of days, and times to ensure no 'blindspots' in coverage.

How effective were research materials?

- The survey materials were largely successful.
- Drivers engaged with the surveys positively and fed back positively on their experiences of earlier phases later in the project.
- For qualitative research, there is a limit on the amount of content that can be covered as drivers do not have experiences or satisfaction as top-of-mind thoughts.
 - Time is required to transition the driver into the topic and significant probing is required.
- Drivers were willing to engage with the diary and to provide photos and media to support their feedback. These approaches can be used in future if they add value overall.
- The volume of feedback achieved at some sites could lead to specific sites skewing the overall data. Any future programme needs a standard target sample frame/universe per wave to prevent trends being affected by high/low completion rates.

Research Objectives & Design

Project Background & Objectives

Business Issue & Context

The UK currently has a shortage of lorry drivers. This is leading to issues in the supply of goods and services to wholesalers, retailers and wider, and with knock-on effects into other sectors, and consumer behaviour and attitudes.

Existing research with lorry drivers has suggested their experience of facilities when stopping during a journey are less positive than for leisure users and could be acting as a deterrent to new entrants, and could be reducing the employment satisfaction for existing drivers.

The effect of this may also be accentuated at present due to the relaxation of cabotage rules drawing in new/more EU drivers – which may have put further pressures on facilities.

Given lorry drivers are key users of the SRN, Transport Focus and the Department for Transport want to ensure that services meet their needs and that lorry drivers have a positive experience of them – through a combination of investment and through encouraging and supporting facilities providers to develop their offer. This requires the development of a research programme that enables lorry driver experiences to be measured in the short and longer term.

This project has been designed to deliver the initial research – providing immediate actionable insights – and provide a best practice approach for future tracking.

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

Focus of this report

- 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.

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 Surveys (2020)

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

- Five** cognitive interviews
- Covered a Motorway Service Area and a Truck Stop, testing both the survey mechanics, and the survey content
- Interviews undertaken by our research team using the 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 left the facilities to return to vehicle to ensure they had used facilities
- Survey offered in 5 other languages
- 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 a 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 recorded 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 explore issues in more 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

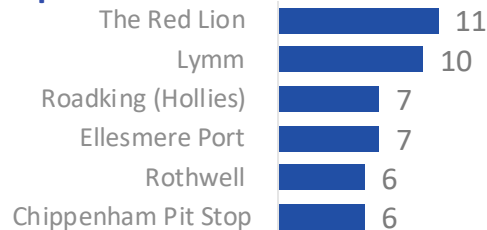
Phase 4: 'On the ground' feedback – a semi-continuous survey across all sites they use

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

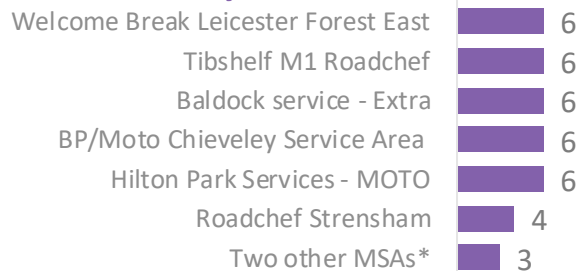
Phase 2 shifts were designed to identify the optimum survey mode(s), day/time of day and incentive across the different site types

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

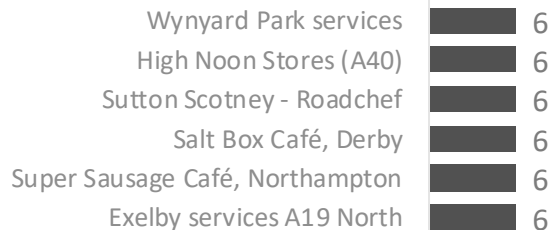
47 shifts at Truck stops:



37 shifts at Motorway service areas:



36 shifts at 'A' road services:



The choice of sites for the intercept surveys was based on three broad principles: grouping sites in clusters (to allow for some movement of interviewers between them and making efficient use of interviewer resource); achieving coverage of the different site types within the North, Midlands and South of England; including sites where experiences of facilities were likely to be mixed. Two Truck Stops (plus a reserve) were first selected in each region. Nearby MSAs were then chosen (that had a range of satisfaction scores from the latest Motorway Services User Survey). Finally, nearby 'A' Road services that looked like they accommodated HGVs (based upon desk research) were added.

Shifts were planned so that each site was surveyed on a mix of weekdays and weekend days, across 3 different shift times and so that each type of incentive was offered at each site and on each day of the week at least once. Where possible each site was covered by at least two different interviewers, to avoid interviewer bias.

During fieldwork some changes had to be made to the schedule, due to severe weather warnings in force and interviewer sickness/personal circumstances. With the exception of the £10 cash option on a Friday, a good spread of incentive type was achieved across the 120 shifts.

Due to some delays with securing permission to survey and lower footfall observed at certain 'A' Road services, some interviewers were diverted to a nearby Motorway Service Area or Truck Stop. This resulted in 12 shifts for 'A' Road services being redistributed. Some delays also arose with permissions at MSAs resulting in resource re-allocated/alternative sites being found.

Number of shifts completed by day of week and incentive offered:

	No incentive	£5 cash	£10 cash	£5 voucher	£10 voucher	Total
Monday	4	1	4	1	3	13
Tuesday	7	4	3	3	4	21
Wednesday	7	2	6	4	5	24
Thursday	8	4	3	4	4	23
Friday	8	3	0	1	1	13
Saturday	2	4	2	4	2	14
Sunday	4	2	2	3	1	12
	40	20	20	20	20	120

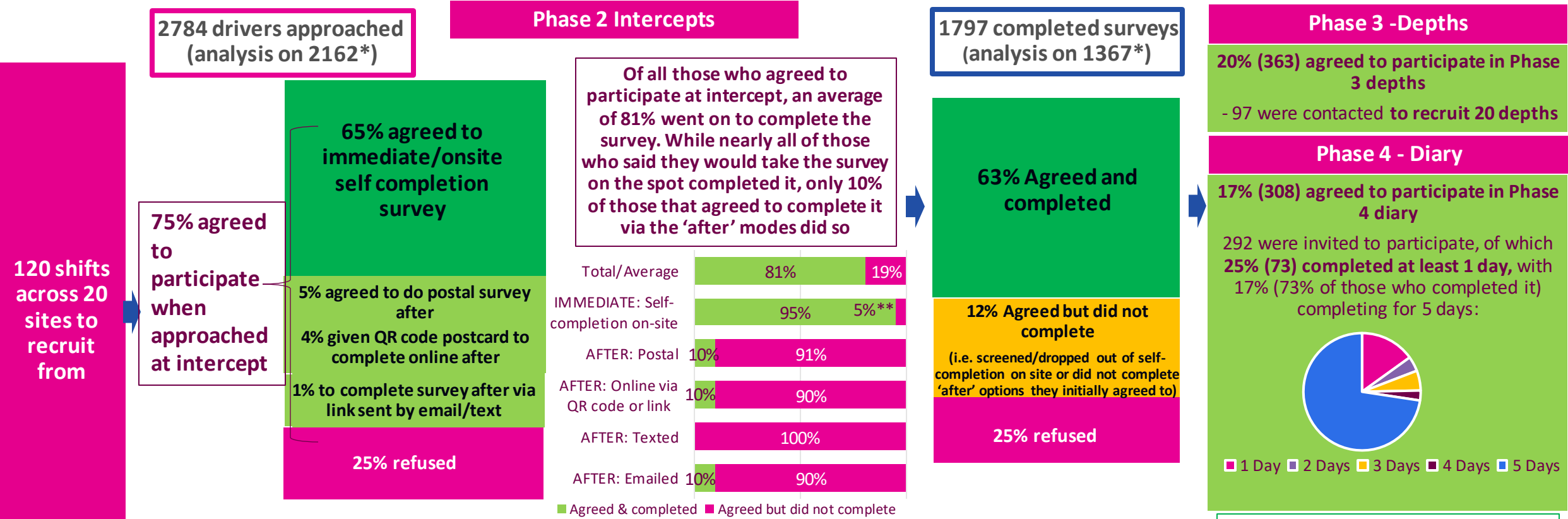
40 shifts from 8am-3pm
40 shifts from 12pm-7pm
40 shifts from 2pm-9pm

17 interviewers worked across the 20 sites

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

Key findings in identifying the 'best' approach

Overall, a high level of engagement with intercept surveys, with immediate on-site self-completion preferred. Intercepts generated a robust sample of drivers overall, and 1 in 5 agreed to be contacted for Phases 3 and 4.



*Data for some earlier shifts has been removed from this analysis where interviewers did not record all refusals (across all shifts 2784 drivers were recorded as being approached, but breakdown of response is based on the 2162 where we are more confident of the data). There will still be some margin of error. Rates will also not reflect the number of drivers that could have potentially completed the survey while interviewers were busy interviewing others.

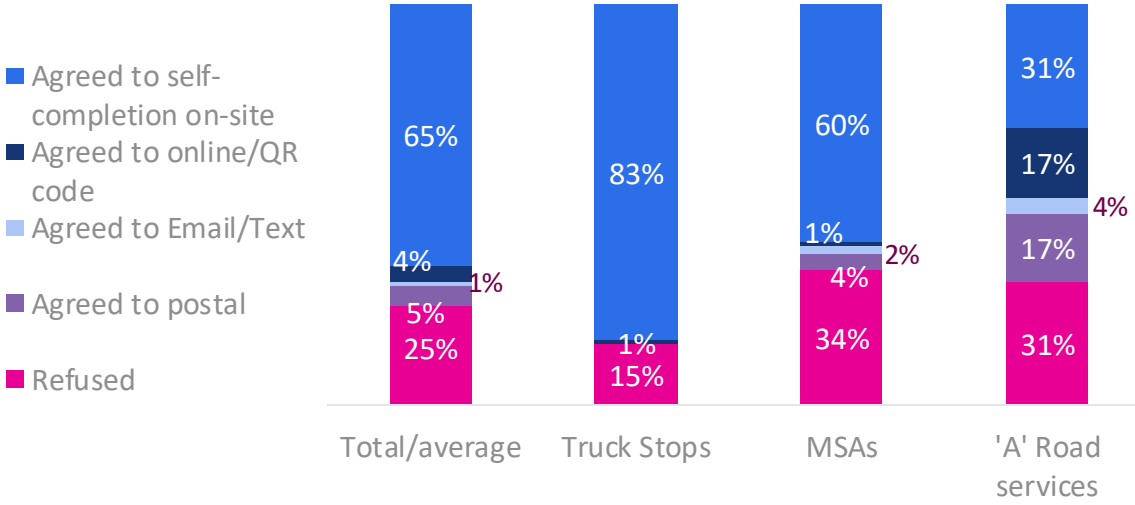
**After agreeing to the on site self completion survey drivers were then asked to verbally confirm their consent so that it could be captured on the tablet. Screening questions were also asked to check whether the respondent had tested positive for COVID in the last 5 days (and could not therefore continue with the face to face interview) and to check they were driving a HGV. 5% did not complete the on-site self completion survey due to them either changing their mind when asked to confirm their consent or screening out at this point.

Overall 15% agreed to participate in both Phases 3 and 4; 5% agreed to Phase 3 only; 2% to Phase 4 only; and 77% to neither.

Truck Stops, where lorry drivers tended to stop longer, were the most productive in Phase 2. 'A' Road services were the least productive; with lower footfall and a higher share of those drivers recruited taking 'after' options, that they didn't complete

Phase 2 Intercepts

Of all those approached...



	Average Approaches per shift	Agreed and completed	Agreed but did not complete	Refused	Completed surveys	Average completes per shift
Total	19	63%	12%	25%	1797	15
Truck Stops	20	81%	4%	15%	949	20
Motorway Service Areas	19	57%	9%	34%	647	17.5
'A' Road services	16	34%	36%	31%	201	6

- The number of completes per shift at each site ranged from:
 - 13 – 27 per shift at Truck Stops;
 - 7-22 at Motorway Service Areas
 - 2 – 9 at 'A' Road services
- In terms of individual sites, base sizes for analysis ranged from 10 (at an 'A' Road services) to 229 (at a Truck Stop).
- Greater information upfront on the range of facilities on offer at 'A' Road services and likely footfall would help to determine which 'A' Road services are more suited to the intercept approach, if they are to be included in future.

Lorry drivers were generally receptive to the survey, but lack of time and not wishing to have their break interrupted were barriers for some.

Phase 2 Intercepts

- Overall **interviewers were well received on site** and clear on what was needed, though some areas for improvement with regards to permissions, interviewer instructions and timings of these have been noted.
- Interviewers generally positioned themselves at the entrance to the facilities but in view of the lorry park so they could observe drivers approaching. Interviewers then either approached them as they were leaving or sometimes introduced the survey as they were coming in.
- **Drivers were generally positive** about the survey and eager to share their views of the services, in the knowledge that it may help to bring about improvements.
- **Main reasons for refusal** were lack of time, drivers tired/just wanted to get on and have their break, and just not interested. After initially agreeing to the on site self completion survey drivers were then asked to verbally confirm their consent so that it could be captured on the tablet. Screening questions also checked whether the respondent had tested positive for COVID in the last 5 days (and could not therefore continue with the face to face interview) and they were driving a HGV. 5% did not complete the survey due to them either changing their mind/having second thoughts when asked to confirm their consent or screening out at this point.
- Overall 98% of all completed surveys were via immediate on-site completion. Though 'after' options were more popular at 'A' Road services due to more people being in a rush, very few (10%/36 drivers) actually went on to complete the survey afterwards.
- In terms of the profile of drivers completing immediately vs. afterwards, by driver type they are similar, with the biggest difference that 'after' respondents were more likely to have stopped at the site for less than 1 hour (72% vs. 44% who completed immediately) and they tended to be less satisfied with their visit. However a sufficient number of drivers stopping for shorter durations and at 'A' Road services are available from within those who completed the survey immediately, to allow analysis by these variables.



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your experience of
visit the website and

Help us improve the experience for HGV drivers...

We want your feedback on your visit to this site today so we know what's good or what needs improving.

Simply visit the website or scan the QR code on the back of this card and enter the access number on your sticker to complete the survey.

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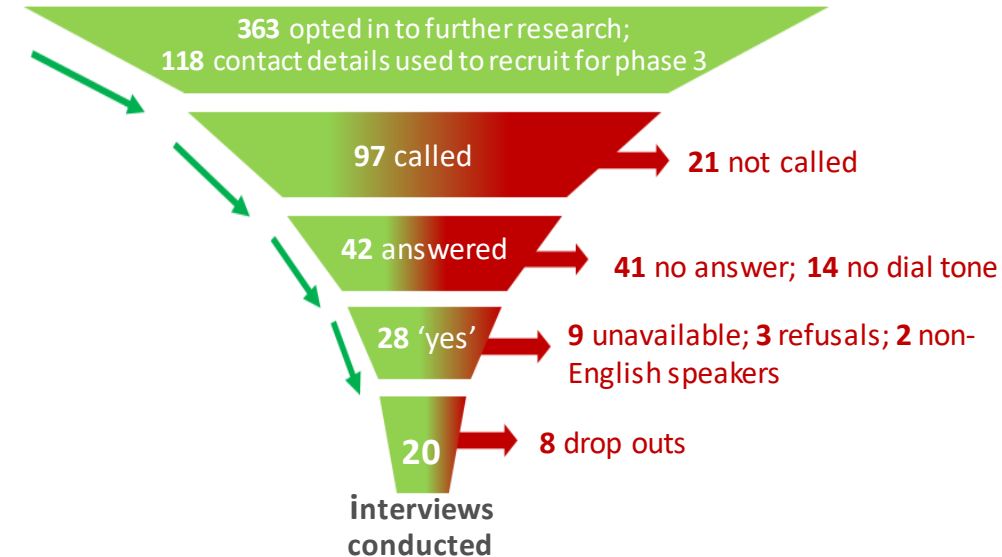
Though a larger/laminated visual similar to the QR code postcard may help to attract attention from lorry drivers, other negatives associated with the 'after' options include:

- Cost of designing & printing materials
- Paper materials not ideal in wet/windy conditions/under fans in the entrance
- Time/effort involved for interviewers in collecting drivers' emails/phone numbers and allocating stickers/access codes, sticking on postal survey/postcard and inputting details into tablet
- Time could be better spent on recruiting more drivers for self completion
- Materials (postcards and paper surveys) were noticed by interviewers to be left lying around services – which could lead to complaints of littering & potential for surveys to be completed by individuals not in scope.

Lorry drivers were generally positive towards further research, helped by their positive experiences of Phase 2

Phase 3 - Depths

- ✓ Calls to respondents for recruitment to Phase 3 were generally well-received.
- ✓ Only one respondent did not remember the survey; the others all **spoke positively about their experiences taking part in the quantitative phase** and this positive experience **impacted desire to take part**.
- ✓ There were spontaneous positive mentions of the field interviewers.
- ✓ The ability to dictate a time and day worked for many drivers; only a small minority expressed a preference for a 'soft' booking (i.e., a non-specified time)
- ✓ Respondents were unfamiliar/few felt confident with video call software; telephone was the clear preference.
- ✓ Verbal pre-warning at the point of recruitment that the call would come from an unknown number worked well, with just 8 not answering the call at the specified time.
- ✓ The reception to the voucher was warm at the point of sign up, but not a core driver of taking part in the research
- ✓ Positively, respondents were still willing to participate despite some taking part in all three phases of the research (quantitative survey, qualitative interview, and depth diaries).
- Of the 97 called **46% did not answer their phone** so were unable to give a reason for refusal. However, common reasons for respondents having to cancel/re-schedule appointments included:
 - Having to change plans during the day;
 - Being out of signal;
 - Not being able to stop at the agreed scheduled interview time;
 - Simply forgetting.

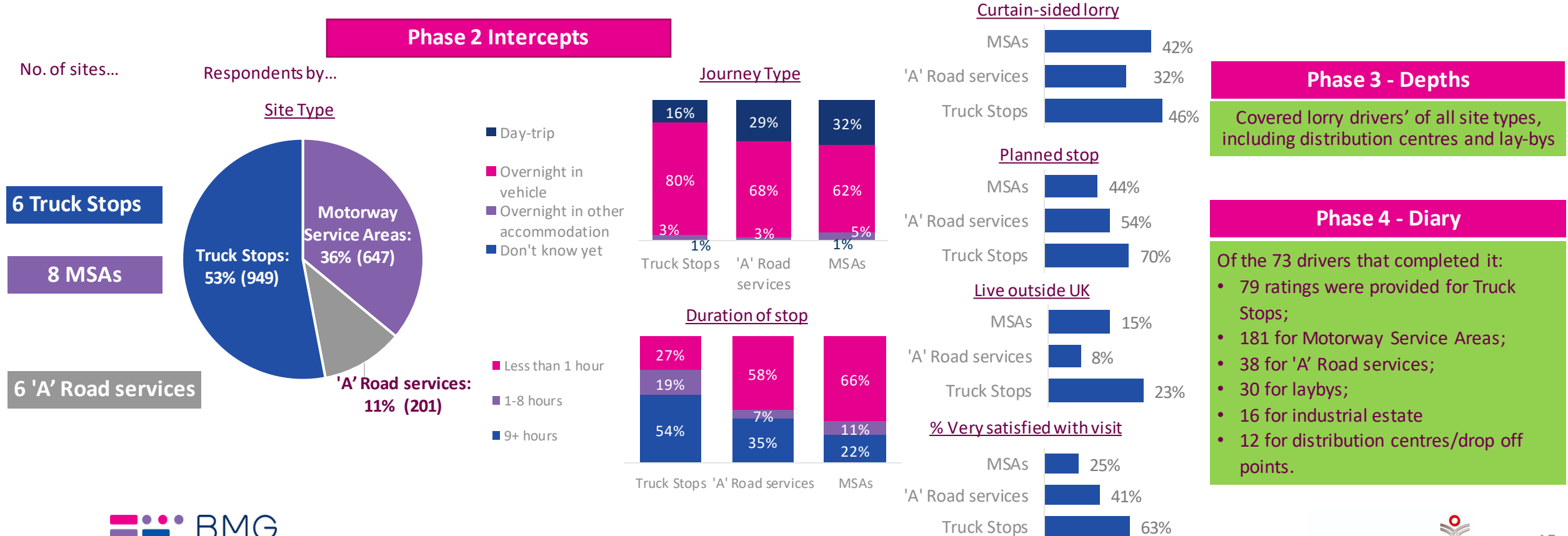


Phase 4- Diaries

- Of the 292 contacts emailed, 30 emails (10%) were not delivered and 140 (48%) were unopened.
- 121 (41%) clicked on the survey link and of these 73 (60%) went on to complete the diary for at least 1 day in the short time frames they were given.
- Only offering the survey on an app may have been a barrier to participation.
- A longer time frame for completion and offering the survey online (without having to download an app) is likely to help improve response, as would improvements to the collection of email addresses (although it does add time to the intercept survey length)

Phase 2 collected views on 20 sites, however responses are skewed towards Truck Stops. Phases 3 and 4 provided coverage of other types of site (e.g. lay-bys and distribution centres) not covered in Phase 2.

Higher representation in Phase 2 of drivers from Truck Stops (compared with MSAs and 'A' Road services) means the 'total' or average across all 1797 respondents needs to be treated with some caution. Particularly as there are some key differences by site, journey type and duration of stop, as well as by satisfaction level. Results may also not be fully representative due to the process of selecting the 20 sites.



All phases generally provided a good coverage of different driver types.

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		

Productivity for intercepts is reasonably similar across all days of the week. Given the variation in the profile/satisfaction of drivers, covering all days would be recommended

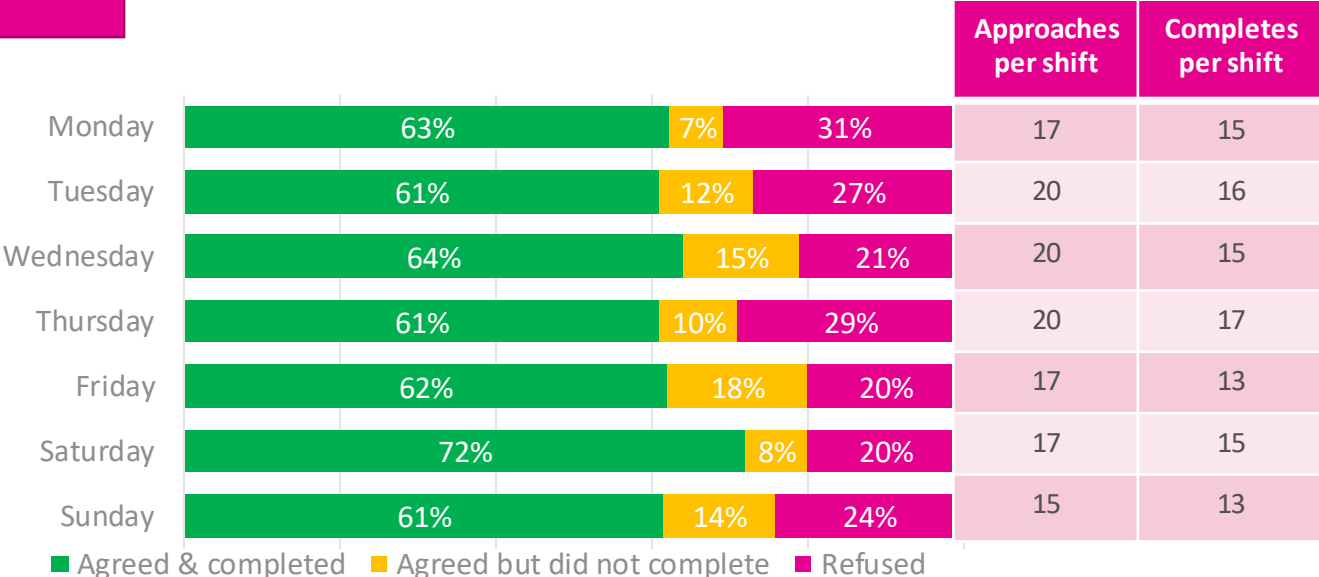
Phase 2 Intercepts

Response to Phase 2 intercepts was highest on a Saturday (80% agreed) but compared with mid-week there were fewer drivers approached (an average of 17 vs 20 on Tues-Thurs) resulting in an average of 15 per day.

Thursdays were most productive with an average of 17 completes per shift. Sundays were least productive (13 per shift).

Some differences in the profile of drivers by day of week are noted which suggest interviewing at weekends and weekdays is preferable e.g.

- Higher proportion of 'overnight - in vehicle' on weekdays (74% vs. 65% weekend);
- Drivers are more likely to stop at sites for longer at weekends (54% had stopped for 9+ hours vs. 37% on weekdays)
- More likely to have planned their stop at weekends (67% vs. 57% for weekdays);
- More likely to be satisfied with visit at weekends (54% very satisfied vs. 44% on weekdays);
- More likely to get drivers who have visited sites outside UK, at weekends (54% vs. 30% weekdays) and to live outside UK (47% vs, 12%).



Phase 4 - Diary

For Phase 4, diary entries were made on all days of the week, with Tuesdays (24%) and Thursdays (22%) accounting for the highest proportions, 5% of entries were on Saturdays and 6% on Sundays. Invites/reminders being sent on weekdays may have affected this as response peaked on the days emails were sent.

If upscaled in the future invites would need to be spread across weekdays and weekends to help provide more even coverage.

2pm – 7pm seems to be the most productive time of day for interviewing lorry drivers, though 12pm-7pm shifts would allow for a broad coverage of drivers

While the 12-7pm shift was slightly busier (19 approaches per shift on average) the refusal rate was lowest in the 2pm-9pm shift (16%).

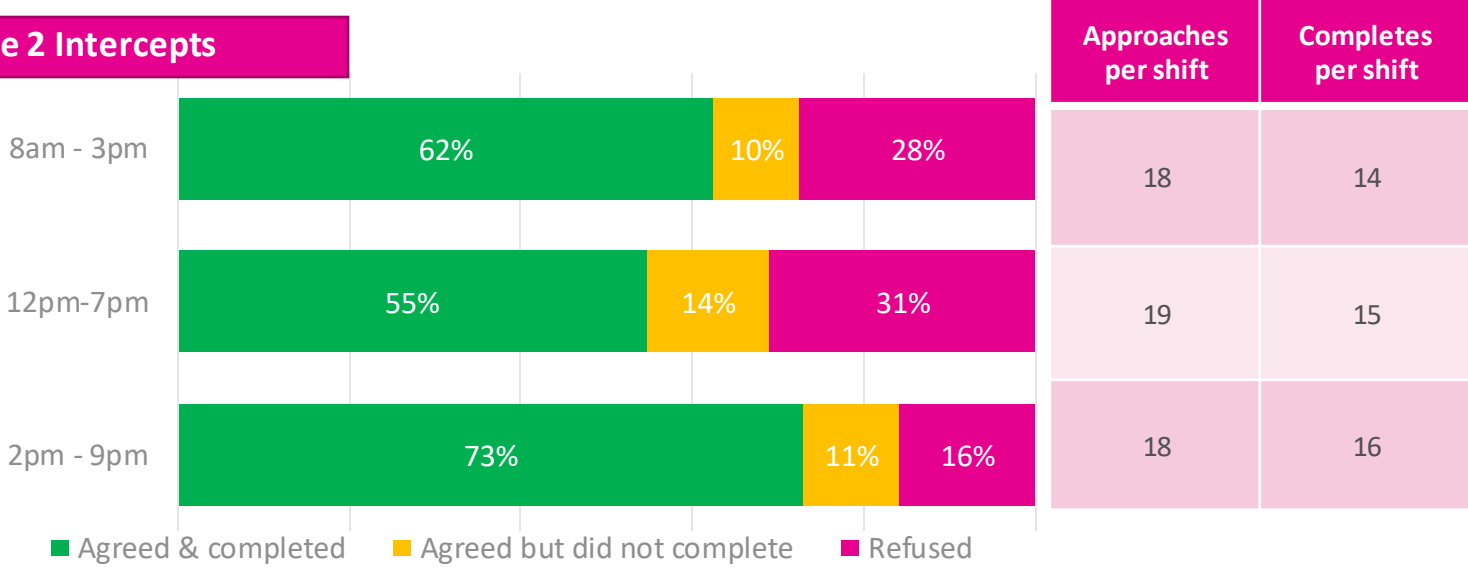
Overall intercepts between 2pm – 7pm were most productive.

Some differences in the profile of drivers by shift time are noted e.g.

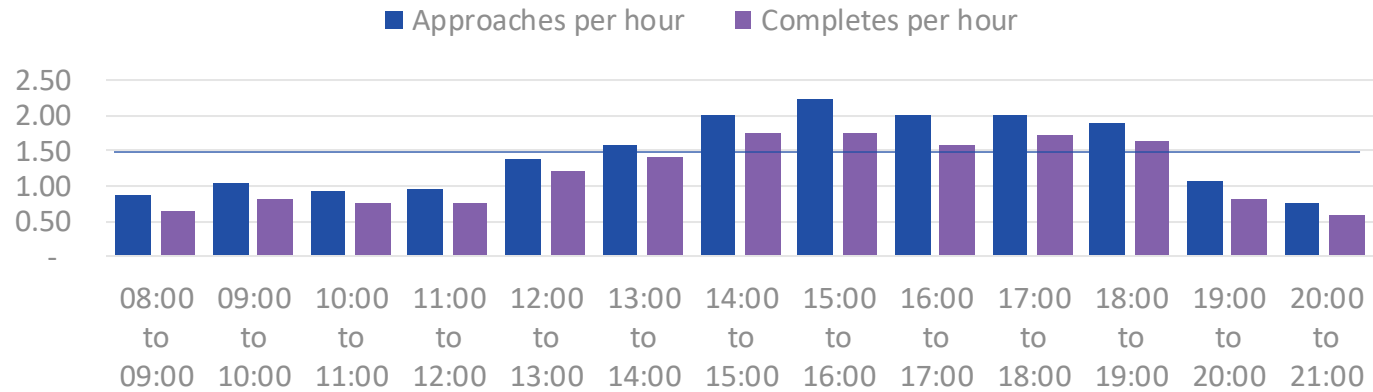
- Day trippers’ most common 8am-3pm (32%) and least common 2pm-9pm (17%)
- Shorter stays among 8am – 3pm shift: 63% stopped for less than 1 hour vs. 31% of 2pm-9pm. While similar proportions at 12pm-7pm (46%) and 2pm-9pm (51%) had stopped for 9+ hours vs. much lower proportion (22%) at 8am-3pm.
- Little difference in other measures including satisfaction, whether visited sites outside UK, whether live outside UK and length of experience.

For 'A' road facilities in particular future designs need to account for varied opening times, some facilities closed at 7pm

Phase 2 Intercepts



Approaches per shift	Completes per shift
18	14
19	15
18	16



Incentives are not considered essential for encouraging lorry drivers to share their views, but preferable. £5 cash incentives seems sufficient and simplest for intercepts

Response was highest when cash was offered (81% agreed vs. 71% for vouchers) although significant numbers of completes were still achieved with no incentive (72% agreed).

Interviewers reported that **incentives helped respondents to recruit other drivers/spread the word** i.e. going back to the lorry park to tell other drivers they'd get an incentive if they take part.

£5 seems sufficient, with **no uplift when £10** was offered.

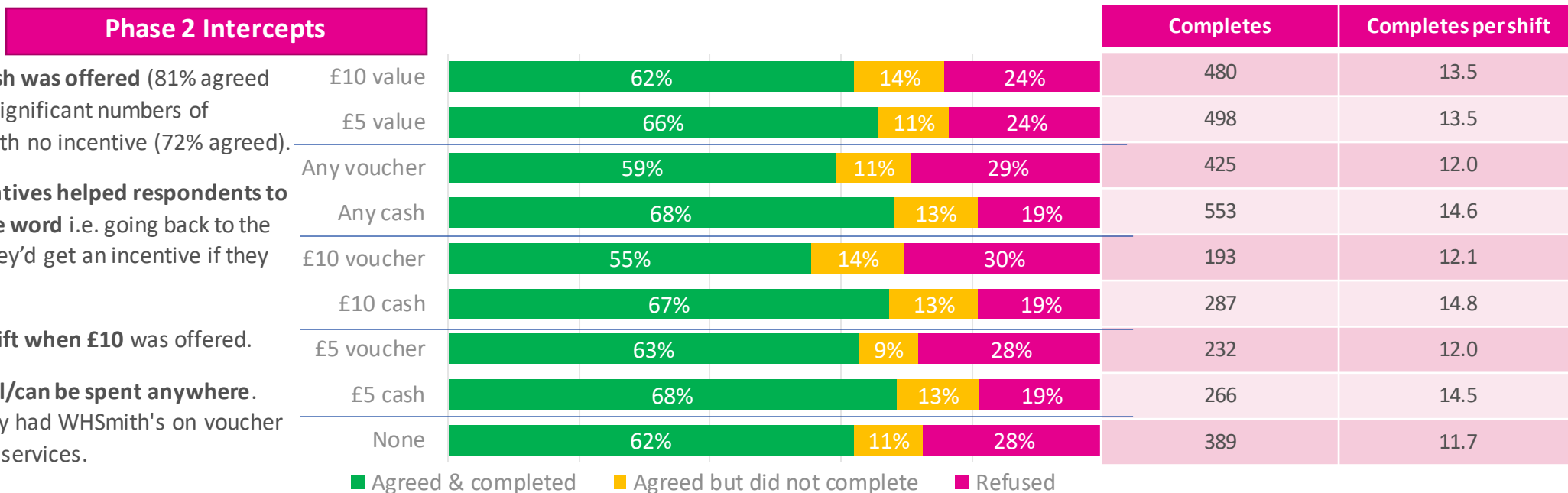
Cash considered more universal/can be spent anywhere. Shopping vouchers although they had WHSmith's on voucher they weren't able to be spent in services.

No difference noted in quality/straight-lining* by incentive type

Little difference in profile variables by incentive offered e.g. journey type or duration.

Some uplift in satisfaction from those receiving cash (51% very satisfied vs. 46% average, and 54% for those receiving £10 cash), but less of a concern if everyone receives the same.

*i.e. Respondents giving the same answers to all items in a battery of statements/aspects on the same ratings scale



Phase 3 - Depths

Incentives were not mentioned by respondents as being a core driver to taking part in the research, though experience suggests that they certainly would have mitigated against drop out rates.

Contrasting with other research projects, incentives were rarely asked about at the end of interviews, and during the point of recruitment was not positively or negatively commented on. More research done on reasons for taking part would be recommended in future waves to further understand this.

Phase 4 - Diary

52 out of 73 respondents completed the survey for 5 days, so it seems the £5 per day incentive was sufficient for those who started it (main consideration is to improve response rate overall).

There was good take up of the Phase 2 survey in other languages

Phase 2 Intercepts

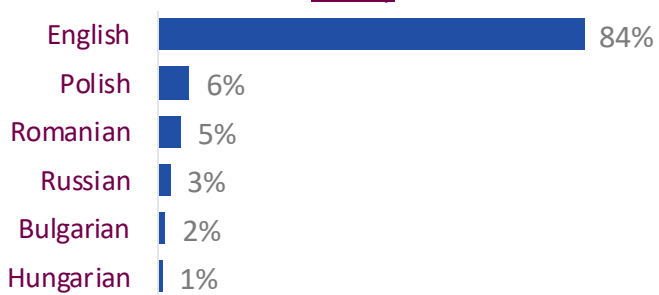
Take up of the other languages was high, with 16% (290 respondents) completing the survey in a language other than English. Polish (6%) and Romanian (5%) most common.

No other languages were requested/thought to be missing.

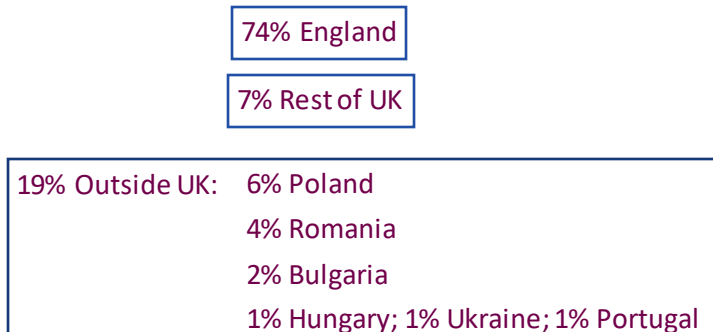
Overall 1 in 5 respondents said they live outside the UK (19%).

Clearer labelling of the languages available including in the interviewer briefing and perhaps a recorded audio of the survey introduction on the tablet in different languages would help to boost this further.

Choice of language to complete Phase 2 Survey



Country drivers live in



Phase 3 - Depths

Only providing English as a language for the telephone interviews was a barrier to reaching foreign drivers.

Only one non-UK national participated in the qualitative interviews therefore, we did not meet our quota. Drivers said they wouldn't feel comfortable taking part because they did not believe their knowledge of English would be good enough. This meant it was not possible to contextualise foreign drivers' experiences.

Offering alternate languages should be considered for future work.

Phase 4 - Diary

The diary was only offered in English due to relatively low numbers (51 out of 308) from Phase 2 agreeing to participate in the diary. However non-UK drivers were only slightly less likely than UK drivers (15% vs. 18%) to agree to be contacted about the diary. So it might be worth offering other languages if the diary element is up-scaled.

Questionnaires/topic guides generally worked well in generating the insight required

Phase 2 - intercepts

Cognitive testing and how pressed for time drivers are highlighted the need for the layout and navigation of the survey on the tablet/online to be as clear and simple as possible.

The full survey length including the initial approach averaged just under 12 minutes and the survey itself took respondents an average of 10 minutes to complete, with interviewers reporting that this seemed acceptable to drivers. However, some drivers did find the detailed perceptions question (rating 23 aspects of the site) repetitive.

Feedback in Phase 3 highlighted at Q6 (reasons for stopping) an additional response code may be needed 'Site is close to drop off/collection point/job location' and that at Q10 and Q12 (on the facilities used and their detailed perceptions of them) there was some confusion as to what was meant by the lounge/TV area, with some respondents confusing this with the main sitting area in service stations.

Phase 3

The topic guide was designed with flexibility and adaptability in mind from the outset. The flexibility was the most useful aspect in terms of generating insights, and it would be recommended to ensure that this continues in future waves.

During interviews, it became apparent that lorry drivers did not naturally evaluate their experiences and so deeper probing on core areas of questioning were necessary, leading to some areas of the guide having to be prioritised.

Fortunately perceptions and improvements of separate services were covered prior to the separate section, allowing moderators to skip this section.

The section discovering decision-making was not necessary as most drivers covered this spontaneously, but scenario testing was interesting when it came to prioritisation of improvements needed.

Phase 4

Overall the diary worked well, with the majority of respondents completing it for 5 days

33 individual photographs were provided by 20 respondents

A wider range of sites was captured than was possible in Phase 2

More considered/detailed open responses about what could be improved at each site were captured... see next slide

Descriptions of individual (non-precoded sites) were variable which make it difficult to identify some individual sites e.g.:

One of our shared depots

Outside customers premises

Side road, industrial estate in West Brom

Building Site

The Phase 4 diary captured more detailed/considered responses on a wider range of sites/types than was achievable in Phase 2 – this could help to identify sites worthy of intercept surveys/further exploration

'A' Road services...

Small HGV parking area ...only exit appears to be via the HGV pumps. If a few lorries are at the pumps then there can be a long wait to exit, even if you've only used the parking

There's not much that can be done, it's a small petrol/service area. There isn't any official parking area for HGVs, although you can park in a small area for coaches (never seen coaches parked there in 20 odd years). So maybe that could be converted into HGV parking. Plus there is, as usual, loads of car parking that's very rarely fully used. Also the toilets, as usual for the network, they're poorly maintained and dirty!

Extend to add dedicated truck parking. Add a truck stop cafe with home cooked food etc. roast dinners. McDonald's and ESSO shop just not enough. Shop too expensive. Half price food/drinks for truckers. CCTV please.

Motorway Service Areas...

This site is the standard that other service areas should be aiming for, it's immaculate inside and out and has a very calming entrance to the side of it, with water feature in the pond. If only other service stations were maintained to this standard they'd be less of an issue. There is also a very good array of shops inside the building and a kids soft play area so all members of the family are catered for.

It's a motorway services, it's expensive! Also I'd like to see more outlets that serve real food with vegetables instead of mainly fast food!

It's been raining steadily today and the truck park is flooded, there are also deep Waterville potholes.

Parking could be significantly improved. Like all services there is no security or a lack of. Usual over priced poor food. Toilets were decent though.

Truck Stops...

It was late in the evening I phoned to check availability & they managed to get me a parking space.

It would be even better if it was open earlier on a Sunday (the restaurant).

One of the best truck stops I always stop here.

The diner and toilet shower blocks are very dated, all be it very clean and well maintained. They could do with updating and completely separate ladies and gents toilets. The car park is made from dirt and dust and has some lumps and divots in it.

Industrial estate...

In this region there is not enough parking, you need to drive for about 50min to find a proper HGV truck park.

Layby with café...

Parked up for 9 hours from 10am this morning, if it was evening there would be no facilities open

'My Home' ...

This questionnaire presumes drivers get the opportunity to actually stop at a services regularly and we don't. Showers aren't free of charge and there is often an issue with lack of parking spaces, which means sleeping in suitable lay by or industrial estates, where there is space. In this instance, for the purpose of this questionnaire, I actually parked up near home, had my shower and lunch there (for free).

All 3 phases generated good quality data, with some room for improvement

Phase 2 Intercepts

- For a minority of shifts we are less confident that all approaches/refusals have been recorded. Building in more time between field start and interviewers receiving briefing/receiving written instructions, as well as a simplified choice of modes would help with this.
- Little evidence of 'straight-lining'* in survey responses overall, nor by survey variables such as incentive type, day or time of day.
- Acceptable levels of 'don't knows'
- Good quality of responses from open ended questions, though generally not as detailed as in Phase 4 diaries:

Not as modern

It's clean and someone walks around site.

Clean and safe

The road surface is flat and even

Lots of facilities

Older and less appealing

*i.e. Respondents giving the same answers to all items in a battery of statements/aspects on the same rating scale

Phase 3 - Depths

Good level of feedback achieved from all drivers.

A shorter/more concise topic guide would allow for greater probing/more time to delve into key themes.

Phase 4 - Diary

Overall good level of response including to open ends – generally more detailed than in Phase 2.

Some variability in descriptions provided for other types of site, such as laybys and distribution centres which will make it difficult to identify them.

Some variability in depth of responses to open ended questions on later days of the diary – some evidence that respondents became less interested/tired over time.

Each of the 3 phases added value to the programme

Phase 2 - intercepts

+ points

Robust sample sizes for analysis in total and by site type, and for some individual sites and demographic groups/driver types.

Good uptake from non-English speaking drivers

Immediate/top of mind response to the visit

Additional observations/intelligence gathered from interviewers being on site

Worked particularly well for Truck Stops and MSAs

- points

Less productive for 'A' Road services

No coverage of distribution centres, industrial estates or laybys – where footfall is likely to be low/not suited to cost effectively conducting intercepts

Less suitable for generating detailed/robust insight from minority groups e.g. low base of female drivers

'After' modes generally not seen as attractive by lorry drivers and not considered cost effective

Phase 3 - depths

+ points

Allowed much more detailed exploration of issues than was possible in Phases 2 and 4.

Helped to explain the reasons for differences observed between different types of drivers and their differing needs.

Gained feedback on all site types, including distribution centres and industrial estates.

- points

Just 1 participant lived outside the UK. Offering a platform/translators for non-English speakers would boost this.

Nature of qualitative research means base is lower than in quantitative surveys.

Phase 4 - diary

+ points

Broader range of site types, including industrial estates, distribution centre, lay-bys etc

Broader range of individual sites

More considered/detailed feedback on each site

Photographs

Relatively low cost/less labour intensive than Phase 2.

- points

Low base size overall, but could be improved/up-scaled with limited additional cost

Low base sizes for individual sites

Offered only in English - would need to consider cost/additional translation work in offering it in other languages vs. likely take up.

Completions peaked on weekdays/on the days survey invitations/reminders were sent. Spreading communications across weekdays and weekends would help provide more even coverage of all 7 days.

Only method of completion was by downloading an app. Option to complete via online link might help boost response.

TECHNICAL APPENDIX

Phase 1: Research Design and Cognitive Testing

Iterative approach to questionnaire design

Design

The design of the Phase 2 and 4 questionnaires involved an iterative process between BMG Research and Transport Focus drawing on insight and input from:

- Qualitative research undertaken at the pre-design stage (see separate report produced by Teresa Hadfield)
- Review of pre-existing research and information undertaken by Transport Focus
- BMG Research's knowledge of the sector and experience in conducting user satisfaction research
- Discussion and review of questionnaire content/drafts by industry experts and Department for Transport

Cognitive Testing

The agreed questionnaire for Phase 2 and the survey approach was then tested by undertaking 5 cognitive interviews in early February. Interviews, each lasting 20-30 minutes, were designed to test and gather feedback on:

- Comprehension of individual questions, survey terminology, and overall survey length
- Driver response to and engagement with the survey overall
- The incentives being offered, and drivers' likelihood to participate in and preferences with regards to further research in Phases 3 and 4
- The optimum approach and positioning of interviewers to intercept drivers

Of the 5 interviews completed, 3 were undertaken at a MSA and 2 at a dedicated Truck Stop, covering a range of driver types:

- 4 were driving a HGV over 7.5 tonnes and 1 under 7.5 tonnes
- 4 were sleeping in their vehicle overnight and 1 was sleeping in other accommodation
- 4 had stopped at the services for 45 minutes and 1 for an hour
- 4 were males aged 35-64yrs and 1 a female aged 18-24yrs
- 4 respondents were from England and 1 from the Czech Republic
- 4 were employees working for one company and 1 an agency driver working for only/mainly one company.
- 3 had been a lorry driver for 1-4 years and 2 for 20+ years

Feedback from cognitive interviews

Response and engagement

- Overall the feedback from the cognitive interviews was **very positive** with drivers feeling the survey was **much needed and relevant** to them.
- Drivers were generally very **keen to share their views but very pressed for time** – with drivers conscious they needed to get back on the road; that their boss would be on the phone wondering where they were; and they wanted time to switch off and have a break from driving (do what they'd come to the services to do).
- Interviews demonstrated the need for a **careful balance between quality and quantity**, in terms of how much time/thought we could expect of drivers 'on the spot' vs. what might be better suited to follow up research/questions afterwards.
- Based on how rushed drivers were when leaving the services, it was felt best to try and recruit or at least introduce the survey as drivers arrived at the services, to let them know we'd like to get their views once they'd used all the services they intended on using.

Questionnaire content

- Respondents hadn't heard of Transport Focus, although this didn't deter them from participating.
- The questions and terminology used were generally understood, however overall the survey was **too long**, averaging 18 minutes.
- Although there was some additional discussion (for the purposes of the cognitive testing) the survey certainly wasn't 10 minutes and it was clear the longer respondents were there, the more rushed/under pressure they seemed, which was **likely to affect the quality of their responses**.
- Drivers **particularly struggled with questions that required more thought/consideration**:
 - 'Max diff' questions - which asked them to rate the aspects most and least important to their visit
 - Open response questions – where they needed to type in a response in their own words e.g. to explain their reasons for dissatisfaction

Incentives and further research

- Shopping vouchers, that could be spent in a variety of places, were generally preferred over Amazon vouchers
- All 5 agreed to be contacted about the Phase 3 depth interviews and 4 out of 5 agreed with regards to the Phase 4 diary.
- A notification by text or email seemed the best way to make initial contact with them to arrange further research, as they'd be unlikely to answer an unknown/no caller ID number.
- Late afternoon/3-4pm onwards generally seemed to be the best time to make contact with drivers, although perhaps not too late as a couple mentioned that they tend to do their paperwork and then settle down for the night.

Phase 2 questionnaire – refined following cognitive testing

Changes as a result of cognitive testing

- Added an explanation in introductory letter/showcard on who Transport Focus are
- Max diff questions were removed (with importance to be covered in key driver analysis and in depth interviews in Phase 3)
- The number of open response questions was reduced
- Questions on reasons for stopping at the services were re-worked slightly and some rating scales simplified
- A question added to determine whether driver was driving a curtain-sided vehicle, given how important this seemed in relation to vehicle security

Final Phase 2 Questionnaire

Variables defined up front/by the interviewer:	<ul style="list-style-type: none"> • Site name and type • Day of the week • Time of shift (8am-3pm/12pm-7pm/2pm-9pm) • Incentive offered (whether none/£5 or £10 cash/£5 or £10 shopping voucher) • Whether driver they approached was male or female
Response/screening	<ul style="list-style-type: none"> • Whether they agreed to participate or not, and if so their choice of survey mode: whether 'immediate' i.e. self completion on tablet, or 'after' i.e. online via QR code or survey link on postcard, being emailed or texted the survey link, or postal survey • Language chosen – English, Polish, Romanian, Russian, Bulgarian or Hungarian • Screener to ensure they were driving a HGV/LGV over 3.5 tonnes
Main survey	<ul style="list-style-type: none"> • Type of journey – whether single shift sleeping at home before or after, or multi-day trip involving sleeping in vehicle or other accommodation • Specifics relating to the site they had stopped at: how often they stop there, their main reason for needing to stop, whether the stop was planned in advance, why they stopped at that particular site and duration of their visit • Experience of their visit: services/facilities used; overall satisfaction; detailed perceptions of aspects including parking, food/drink, security, toilets and showers; • Overall perceptions: how the site they visited compares with others in the UK; whether they think services for lorry drivers in the UK have got better or worse in the last 12 months and how they compare with services outside the UK (where drivers have experience of these) and overall satisfaction with the number of places for HGVs to stop at in the UK and the quality of places • Profiling and employment: gender; age; country they live in; • Interest in further research – for Phase 3 and 4

Other design considerations to improve response

Offering a choice of survey completion modes

- The final agreed questionnaire for Phase 2 was scripted for 'immediate' self completion (in the presence of the interviewer) and for online completion 'after', by using the QR code/survey link from the postcard given to the respondent, or by following the link sent to the respondent by email or text
- A version of the survey was also created for self-completion 'after' on paper, that could be handed back to the interviewer or posted back to BMG (free of charge).
- An 'access code' on a sticker was placed on every QR code postcard and paper survey which respondents typed in to access the survey, to allow us to link respondents back to the site and shift they were given the survey.
- Emails/texts also contained an access code to be entered at the start of the survey.



Help us improve the experience for HGV drivers...

We want your feedback on your visit to this site today so we know what's good or what needs improving.

Simply visit the website or scan the QR code on the back of this card and enter the access number on your sticker to complete the survey.




Help us improve roadside facilities for you and other lorry drivers...

To complete this survey about how we might improve your experience of sites like the one you visited today scan the QR code or visit the website and enter the number shown on the sticker.

Place sticker here



www.HGVSurvey.co.uk

Pro_2209_01





Place sticker here

This survey, among HGV/lorry drivers, is being carried out by BMG Research, an independent market research agency, on behalf of Transport Focus, the independent watchdog for transport users.

We are looking to get feedback on lorry driver facilities across the UK. Depending on your answers the survey should take around 10 minutes to complete.

Your responses will be treated in the strictest confidence. BMG Research abides by the Market Research Society Code of Conduct and data protection laws at all times.

You can also find out more information about our surveys and what we do with the information we collect in our Privacy Notice which is on our website www.bmgresearch.co.uk/privacy

By completing and returning this questionnaire to us, we will take this as your consent for us to process and analyse the data you have provided.

Please read these instructions before answering the survey

- 1) Mark each answer with a cross (x) or tick (✓) in the box.
- 2) Completely 'colour in' any boxes crossed in error. ■
- 3) Only write in answers where we ask you to.

Other design considerations to improve response

Offering a choice of language

Based on desk research and a review of the most commonly spoken languages by lorry drivers, including feedback from Snap and the Department for Transport, it was decided the Phase 2 survey would be offered in the following languages, as well as English:

- Polish
- Romanian
- Russian
- Bulgarian
- Hungarian

Range of sites

A priority list of sites was selected based on desk research to cover a range of different site types spread across England. The plan was to conduct 6 (7-hour) shifts of interviewing at each of the following:

- 6 dedicated Truck Stops
- 6 Motorway Service Areas (MSAs)
- 8 'A' Road services (split into larger and smaller ones)

Sites chosen were clustered and some reserve sites agreed in case issues arose at a particular site and interviewer resource needed to be diverted.

Permissions:

- All site managers were contacted in advance by phone/email to explain the purpose of the research and gain permission for interviewers to be on site during the fieldwork period. Arrangements for who interviewers should report to on arrival and where to park were agreed and a letter of authority shared as written confirmation. In some instances risk assessments were also required.
- Laminated copies of the letter of authority were also taken out by interviewers to be used as a showcard/added reassurance for respondents.

Interviewer instructions & briefing

All interviewers were provided with a detailed briefing pack, explaining the purpose of the research and the choice of modes available, as well as instructions on health and safety issues, including the wearing of high-vis jackets and that interviewing was not to be conducted in parking areas.

Interviewer packs also contained:

- Copies of the QR code postcards and paper surveys (and return envelopes)
- Access code stickers – with codes relevant to the shifts they were covering
- Vouchers in the appropriate denominations (where these were being offered)
- For cash incentives, a bank transfer was done to the interviewer for them to withdraw the cash in the appropriate denominations
- Laminated copy of the letter of authority
- Thank you cards to be given to each respondent giving further details on BMG Research/GDPR

A full briefing was also given via Microsoft Teams and recorded so that interviewers could refer back if needed. All interviewers also had details of their immediate supervisor, BMG's field managers, and if needed, contact details for a member of the research team, for any queries.

Phase 4 diary – core questions from Phase 2

- As the final part of the design phase, once the Phase 2 survey had been fully launched, the Phase 4 diary questionnaire was agreed.
- The diary contained core questions considered most appropriate from Phase 2, with some of these answered just once a day, and others each time they stopped at a site during the course of the day.
- Variables such as age, gender and length of experience were carried over from their Phase 2 responses.
- Based on the relatively low numbers of non-English speaking drivers indicating in Phase 2 that they were interested in completing the diary, the decision was taken to offer Phase 4 in English only.

Final Phase 4 Questionnaire

Variables merged in from Phase 2:	<ul style="list-style-type: none"> • Gender & age • Country driver lives in • Length of experience as lorry driver • Employment type and where their employer is based • Who pays for their expenses
Answered once a day	<ul style="list-style-type: none"> • Date/day of the week • Type of HGV – whether under/over 7.5 tonnes and whether curtain-sided • Whether they'd be driving the same vehicle on each day of the diary (asked once on Day 1) • Type of journey – whether single shift sleeping at home before or after, or multi-day trip involving sleeping in vehicle or other accommodation
Answered each time they stop and park up	<ul style="list-style-type: none"> • Type of site stopped at and name/description of site • Specifics relating to the site they had stopped at: their main reason for needing to stop, whether the stop was planned in advance, why they stopped at that particular site and duration of their visit • Experience of their visit: services/facilities used; overall satisfaction; perceptions of key aspects (at top-level): access, parking, food/drink, security, toilets and showers; • Suggestions for improvement/further comments • Option to upload photos

Phase 2: On-site Intercepts

Key points of feedback from interviewer de-brief

Permissions/arrival at each site

- Due to the timings some permissions still hadn't been fully confirmed before fieldwork started, which meant interviewers were allocated to sites before us being fully confident we'd be allowed to interview there. Need to try and agree sites and gain permissions earlier.
- Instructions for each site varied in terms of the level of information - need to make sure for all sites we have:
 - Site manager name/ person in charge
 - Where to report to on arrival at site/ where site manager is located
 - Opening times for each site
 - Who gave permission to interview at the site (person spoken to over the phone when arranging permissions)
- ID cards for interviewers specific to the site might help response
- Although sites were generally clustered and some reserves in place, need to make sure all sites/shifts have a known reserve should an issue arise. Although the need for these would reduce if all permissions were fully agreed in advance.
- Interviewers were generally made to feel welcome once they did arrive on sites where permissions had been given.

Clarity of interviewer instructions/how prepared they felt

- Interviewers generally had a good understanding of the job although some would have appreciated more time between receiving their packs and their first shifts. This would also help in case anything was missing & allow more time for any queries.
- Interviewers were aware the survey was available in 5 other languages but it could have been made clearer in the instructions and on the QR postcard which languages they were
- Some interviewers were a little overwhelmed with the volume of materials, with the need to carry QR codes postcards, paper surveys, showcard, incentives, their tablet and thank you cards. Their packs were quite heavy to carry.

Positioning of interviewers on site, management of approaches

- Interviewers found the best place to stand was the entrance to the service station. To identify who the eligible respondents were, they watched them as they came out of their vehicles and then followed them in. The survey was then generally completed inside although some were done outside as the drivers were leaving.
- Interviewers were asked not to interview in the lorry parking areas. However, some felt they should be given flexibility on where they can interview at the site with them assessing their health and safety at each site.
- Where sites are dual sited we may need to reinforce the instruction of which side they need to stay on or whether if one side is quieter than the other they are allowed to cross over

Key points of feedback from interviewer de-brief

Overall response from drivers & key differences between site types

- Where respondents had time to participate, they were generally happy to do so and comment on the service. Main reasons for refusal were that they were in a rush/too tired/just wanted to get on and have their break/not interested
- Best response was from the Truck Stops followed by Motorway Service Areas. 'A' Road services were less productive.
- Length of survey was generally considered to be fine, although Q12 on the rating of the different aspects was found to be repetitive/a little too long

Choice of modes/materials and why so few took up the 'after' options

- Self completion on site using the interviewer's tablet device was the best option as the respondent was more likely to complete the survey there and then.
- Where postal/ online card options were given, interviewers found these left behind on tables or on the floor which could cause issues with the site (littering).
- When offered other modes (postal/ online), respondents generally fed back that they did not have time and needed to leave.
- Interviewers found the different materials/stickers quite fiddly to use in field whilst working outside as it was windy or the fan under the entrance door made it difficult to take off sticker and place it onto the postal or online card options.
- On some occasions, the interviewers administered the survey rather than it being a self-complete as the respondents were either eating or their hands were full as they were leaving the service station.

Incentives

- Impression from interviewers was that cash worked better
- Vouchers - WH Smith logo was on the voucher but respondents could not spend these at the service station (small print on voucher website)
- Word of Mouth helped encourage completions - Respondents that knew about the incentive and had participated also told other truckers about the survey and incentive.

Response by site type

	Average approaches per shift	Agreed and completed	Agreed but did not complete	Refused	Completed surveys	Average completes per shift
Total	19	63%	12%	25%	1797	15
Truck Stops	20	81%	4%	15%	949	20
Motorway Service Areas	19	57%	9%	34%	647	17.5
'A' Road services	16	34%	36%	31%	201	6

Response by day of week

	Average approaches per shift	% agreed and completed	% agreed but did not complete	% refused	Completed surveys	Average completed surveys per shift
Total	19	63%	12%	25%	1797	15
Monday	17	63%	7%	31%	197	15
Tuesday	20	61%	12%	27%	337	16
Wednesday	20	64%	15%	21%	370	15
Thursday	20	61%	10%	29%	373	17
Friday	17	62%	18%	20%	180	13
Saturday	17	72%	8%	20%	212	15
Sunday	15	61%	14%	24%	128	13

Response by the 3 shift times

	Average approaches per shift	% agreed and completed	% agreed but did not complete	% refused	Completed surveys	Average completed surveys per shift
Total	19	63%	12%	25%	1797	15
8am-3pm	18	62%	10%	28%	557	14
12pm-7pm	19	55%	14%	31%	604	15
2pm-9pm	18	73%	11%	16%	636	16

Response by incentive type

	% agreed and completed	% agreed but did not complete	% refused	Completed surveys	Average completed surveys per shift
Total	63%	12%	25%	1797	15
None	62%	11%	28%	389	11.7
£5 cash	68%	13%	19%	266	14.5
£5 voucher	63%	9%	28%	232	12.0
£10 cash	67%	13%	19%	287	14.8
£10 voucher	55%	14%	30%	193	12.1
£5 value	66%	11%	24%	498	13.5
£10 value	62%	14%	24%	480	13.5
Any cash	68%	13%	19%	553	14.6
Any voucher	59%	11%	29%	425	12.0

Regression Analysis – Number of Recruited Respondents

Incentive							
	£10 cash	£10 voucher	None	£5 voucher	£5 cash		
£10 cash	1.00	1.28	1.01	1.12	0.94		
£10 voucher	0.78	1.00	0.79	0.87	0.74		
None	0.99	1.27	1.00	1.11	0.94		
£5 voucher	0.89	1.14	0.90	1.00	0.84		
£5 cash	1.06	1.36	1.07	1.19	1.00		
p=0.227							
Type							
	Truck Stops	MSAs	'A' Road services				
Truck Stops	1.0	1.2	3.4*				
MSAs	0.9	1.0	2.9*				
'A' Road services	0.3*	0.3*	1.0				
p=0.001*							
Time							
	8am-3pm	12pm-7pm	2pm-9pm				
8am-3pm	1.0	1.0	0.9				
12pm-7pm	1.0	1.0	0.9				
2pm-9pm	1.1	1.1	1.0				
p=0.746							
Day							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Monday	1.0	1.0	0.9	0.9	1.2	1.0	1.0
Tuesday	1.0	1.0	0.9	0.9	1.3	1.1	1.1
Wednesday	1.1	1.1	1.0	1.0	1.4	1.2	1.2
Thursday	1.1	1.1	1.0	1.0	1.4	1.2	1.2
Friday	0.8	0.8	0.7	0.7	1.0	0.8	0.8
Saturday	1.0	0.9	0.9	0.9	1.2	1.0	1.0
Sunday	1.0	1.0	0.9	0.9	1.2	1.0	1.0
p=0.369							

- Quasi-Poisson regression analysis predicts the number of drivers expected to agree to complete the survey on a given shift.
- The counts of those who agreed to complete the survey are assumed to follow a Poisson distribution.
- Regression analysis allows us to determine significant factors and measure their unique impact whilst accounting for the effects of other important factors.
- 'Type of Incentive', 'Type of Site', 'Day of Week' and 'Time of Shift' were thought to affect the number of drivers who would agree to complete the survey.
- In the analysis only 'Type of Site' was shown to have a significant association* (P<0.05), with shifts at 'A-Road services' recruiting significantly fewer drivers. 'Truck Stops' (3.4) and 'MSAs' (2.9) recruited around three times more drivers when 'Type of Incentive', 'Day of Week' and 'Time of Shift' were taken into account.

Analysis on profile of respondents – by mode (before vs. after)

		Phase 2 Intercepts	Immediate – on site self-completion	After – via QR code/link/email/postal*
Gender	Male	98%	98%	94%
	Female	2%	2%	6%
Length of time driving	More than 9 years	70%	30%	39%
	Less than 9 years	30%	70%	61%
Type of driving shift	Overnight in vehicle	72%	72%	75%
	Overnight in other accommodation	4%	4%	0%
	Day-drivers	23%	23%	25%
Country live in	UK	81%	81%	97%
	Outside UK	19%	19%	3%
Employment	Company owner/partner/director	4%	4%	3%
	Agency driver	5%	5%	3%
	Employee of one company	90%	90%	92%
Weight of Vehicle	HGV/LGV 7.5 tonnes and over	97%	98%	97%
	HGV/LGV 3.5 - 7.5 tonnes	3%	2%	2%
Type of Vehicle	Non-curtain sided vehicle	56%	43%	31%
	Curtain sided vehicle	43%	56%	69%
Very satisfied with visit		46%	46%	33%
Planned stop		59%	59%	42%
Duration of stop	Under 1 hour	44%	44%	72%
	1 – 8 hours	15%	15%	3%
	9+ hours	40%	41%	25%

The biggest difference is that 'after' respondents were more likely to have stopped at the site for less than 1 hour. This suggests the 'after' options were potentially a way to pick up those on short breaks/in a hurry. However a sufficient number of drivers stopping for shorter durations are available from within those who completed the survey immediately to allow analysis among this group of drivers.

Correlation of rating of facilities

Shows that while ratings around food/drink and showers/toilets highly correlate, this isn't true for separate aspects of parking.

In terms of questionnaire design the data shows that overall the design has worked well. While there is multi-collinearity with the attributes (i.e. several attributes highly correlated with each other) that is always the case for a customer experience survey due to halo effects and the levels here are consistent. In future surveys we could look to drop attributes that have less predictive impact to make the survey experience easier for drivers, however the data itself isn't showing a questionnaire that needs many changes.

■ High correlation
■ Low correlation

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Access	1 Signs		0.4	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.2	0.2	0.3	0.3	0.3	0.2	0.2	0.2	0.2	0.2	0.3	0.3
	2 Access from the main road	0.4		0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.3	0.4	0.4	0.4	0.3	0.3	0.4	0.3	0.4	0.4	0.4
Parking	3 Cost	0.2	0.3		0.5	0.4	0.4	0.6	0.5	0.6	0.6	0.5	0.5	0.6	0.5	0.4	0.4	0.6	0.6	0.4	0.5	0.6	0.5	0.6
	4 Ease of payment	0.3	0.4	0.5		0.4	0.3	0.4	0.4	0.4	0.4	0.5	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.4	0.5	0.5	0.4	0.5
	5 Availability of parking	0.3	0.4	0.4	0.4		0.5	0.6	0.5	0.5	0.5	0.4	0.4	0.5	0.4	0.5	0.4	0.5	0.4	0.3	0.5	0.5	0.5	0.6
	6 The quality of the surface	0.3	0.4	0.4	0.3	0.5		0.6	0.5	0.5	0.5	0.4	0.5	0.4	0.4	0.4	0.5	0.4	0.4	0.3	0.4	0.4	0.5	0.5
Building	7 Management	0.3	0.4	0.6	0.4	0.6	0.6		0.6	0.6	0.7	0.5	0.6	0.6	0.6	0.5	0.5	0.6	0.5	0.4	0.6	0.6	0.6	0.7
	8 Overall impression from outside	0.3	0.4	0.5	0.4	0.5	0.5	0.6		0.6	0.6	0.5	0.6	0.5	0.6	0.5	0.6	0.5	0.5	0.3	0.5	0.5	0.7	0.6
Security	9 Personal	0.3	0.4	0.6	0.4	0.5	0.5	0.6	0.6		0.8	0.5	0.6	0.6	0.6	0.5	0.6	0.6	0.5	0.3	0.6	0.6	0.6	0.7
	10 Vehicle, including of your load	0.3	0.4	0.6	0.4	0.5	0.5	0.7	0.6	0.8		0.5	0.6	0.6	0.6	0.5	0.6	0.6	0.6	0.3	0.6	0.6	0.6	0.7
Food/ drink	11 Speed of service	0.3	0.4	0.5	0.5	0.4	0.4	0.5	0.5	0.5	0.5		0.6	0.5	0.7	0.4	0.5	0.5	0.5	0.4	0.5	0.5	0.5	0.6
	12 The choice/ range	0.2	0.4	0.5	0.4	0.4	0.5	0.6	0.6	0.6	0.6	0.6		0.6	0.8	0.5	0.5	0.5	0.5	0.3	0.6	0.5	0.6	0.6
	13 The cost/ value for money	0.2	0.3	0.6	0.4	0.5	0.4	0.6	0.5	0.6	0.6	0.5	0.6		0.6	0.4	0.5	0.6	0.5	0.4	0.6	0.6	0.5	0.6
	14 The quality of food/ drink	0.3	0.4	0.5	0.4	0.4	0.4	0.6	0.6	0.6	0.6	0.6	0.7	0.8	0.6		0.5	0.6	0.5	0.5	0.3	0.6	0.5	0.6
Toilets	15 Number of toilets available	0.3	0.4	0.4	0.4	0.5	0.4	0.5	0.5	0.5	0.5	0.4	0.5	0.4	0.5		0.6	0.5	0.5	0.3	0.5	0.4	0.6	0.5
	16 How clean the toilets were	0.3	0.4	0.4	0.4	0.4	0.5	0.5	0.6	0.6	0.6	0.5	0.5	0.5	0.6	0.6		0.5	0.6	0.3	0.5	0.5	0.7	0.6
Showers	17 Number of showers available	0.2	0.3	0.6	0.5	0.5	0.4	0.6	0.5	0.6	0.6	0.5	0.5	0.6	0.5	0.5	0.5		0.7	0.4	0.6	0.6	0.5	0.6
	18 How clean the showers were	0.2	0.3	0.6	0.5	0.4	0.4	0.5	0.5	0.5	0.6	0.5	0.5	0.5	0.5	0.5	0.6	0.7		0.4	0.6	0.6	0.5	0.6
Fuel	19 Ease of access to fuel	0.2	0.4	0.4	0.4	0.3	0.3	0.4	0.3	0.3	0.3	0.4	0.3	0.4	0.3	0.3	0.3	0.4	0.4		0.3	0.4	0.4	0.4
Lounge or rest area	20 Lounge/ space to relax	0.2	0.3	0.5	0.5	0.5	0.4	0.6	0.5	0.6	0.6	0.5	0.6	0.6	0.6	0.5	0.5	0.6	0.6	0.3		0.6	0.5	0.6
	21 Ability to rest/ sleep	0.2	0.4	0.6	0.5	0.5	0.4	0.6	0.5	0.6	0.6	0.5	0.5	0.6	0.5	0.4	0.5	0.6	0.6	0.4	0.6		0.5	0.6
Other	22 Cleanliness/ condition of site	0.3	0.4	0.5	0.4	0.5	0.5	0.6	0.7	0.6	0.6	0.5	0.6	0.5	0.6	0.6	0.7	0.5	0.5	0.4	0.5	0.5		0.6
	23 Welcoming/ accommodating	0.3	0.4	0.6	0.5	0.6	0.5	0.7	0.6	0.7	0.7	0.6	0.6	0.6	0.6	0.5	0.6	0.6	0.6	0.4	0.6	0.6	0.6	



Correlation between all codes at Q12. Still thinking about your visit to the site where you were given this survey, please rate the following using the scale below. 1,797 lorry drivers asked about their recent site visit




Phase 3: Qualitative depths

Qualitative Methodology – in depth interviews




20 In-depth interviews



Held over telephone



30 – 45 minute interviews



Weekdays: evenings and during the day



4th – 14th March

- An in-depth interview is a short, structured and guided conversation, moderated by a professional moderator and conducted with a pre-recruited participant from a particular group of interest; in this case, lorry drivers.
- The interviews complemented phase 2 results: while analysis was not complete prior to the interviews starting, moderators were able to use topline findings to steer conversations and add additional insights to interesting patterns and findings emerging.
- The interviews were conducted by two moderators who had been working on the core Transport Focus Project Team since the inception of the project. This allowed for additional probing and ‘off guide’ lines of questioning, adding to the value of responses gained.
- Due to the moderators conducting the interviews being close to the topic, no moderator briefing was required for this project.
- Flexibility of timing was key to ensuring all groups were reached; lorry drivers do not follow a 9-5 schedule and so offering evening interviews and being flexible if asked to reschedule resulted in fewer drop outs.
- It was not clear from conversations what the primary driver for taking part in the research was, and there was a great variation. Very few mentioned the incentive (especially when compared to other research projects), with others stating that they were keen to talk to someone during their day, and others wanting to feed back. There was no majority view.
- Additionally, no lorry drivers asked for context from the research at the time of the qualitative interview, and none asked for access to findings, or queried how these would be used.

Research Design – Benefits and Limitations

Methodology

Benefits

- ✓ Able to spend time probing drivers on more interesting and relevant aspects of their experience.
- ✓ Able to be creative, flexible, and agile with the research to explore new findings and patterns as they emerge.
- ✓ Rolling recruitment method, allowing for timely fieldwork, recruiting as drivers opted-in, thus engaging them when still warm.

Limitations

- ✗ Driver group not used to reflecting on opinions; a pre-task or focus group discussion may facilitate this for future research.
- ✗ Self-selecting sample may skew results.
- ✗ Some drivers lack knowledge (e.g., cabotage) so responses not all actionable.

Discussion guide

Benefits

- ✓ Flow worked well for drivers, with organic opinions coming through.
- ✓ Probing necessary as drivers are not naturally reflective; probes allowed moderators to effectively do this.
- ✓ Decision-making scenarios effectively reaffirmed driver assertions mentioned earlier in the conversation, allowing for insights to be strengthened.

Limitations

- ✗ Due to timeframes, unable to analyse quantitative data prior to designing guide.
- ✗ Time limited to 45 minutes, meaning prioritisation of information gathering needed and occasional running over of time.

Conducting depths over the phone

Benefits

- ✓ Reach drivers ‘in the moment’, where they are in their cabs or at services.
- ✓ Reach drivers at a time they are comfortable with, taking account of ever-changing diaries on the road and antisocial hours.
- ✓ Allow drivers the time to talk (noted as being a positive for many who do not often converse with others).
- ✓ Reach drivers where they are comfortable with (over the phone, not online).

Limitations

- ✗ Lack of personal interaction allowing for analysis of body language or facial expressions.

Recruiting the Sample

BMG used a fully briefed in-house recruiter to manage the qualitative recruitment of this project. The recruitment script was written by a member of the core research team, and proved effective for optimising opt-in rates.

[Good morning/afternoon]

I'm calling on behalf of BMG research and Transport Focus. You recently took part in a survey about your experiences at roadside facilities and agreed to take part in some further research.

- ✓ Only one respondent did not remember the survey; the others all spoke positively about their experiences taking part in the quantitative phase and this positive experience impacted desire to take part.
- ✓ There were spontaneous positive mentions of the field interviewers.

We would like to book a call back for one of our researchers to have a further discussion with you about your experiences [time and day]

- ✓ The ability to dictate a time and day worked for many drivers; only a small minority expressed a preferent for a 'soft' booking (i.e., a non-specified time)

The interview will take about 30-45 minutes to complete and can be done via zoom/teams or by telephone.

- ✓ No respondent had Microsoft Teams and few felt confident with Zoom; telephone was the clear preference, with drivers confident with this way of having a conversation.

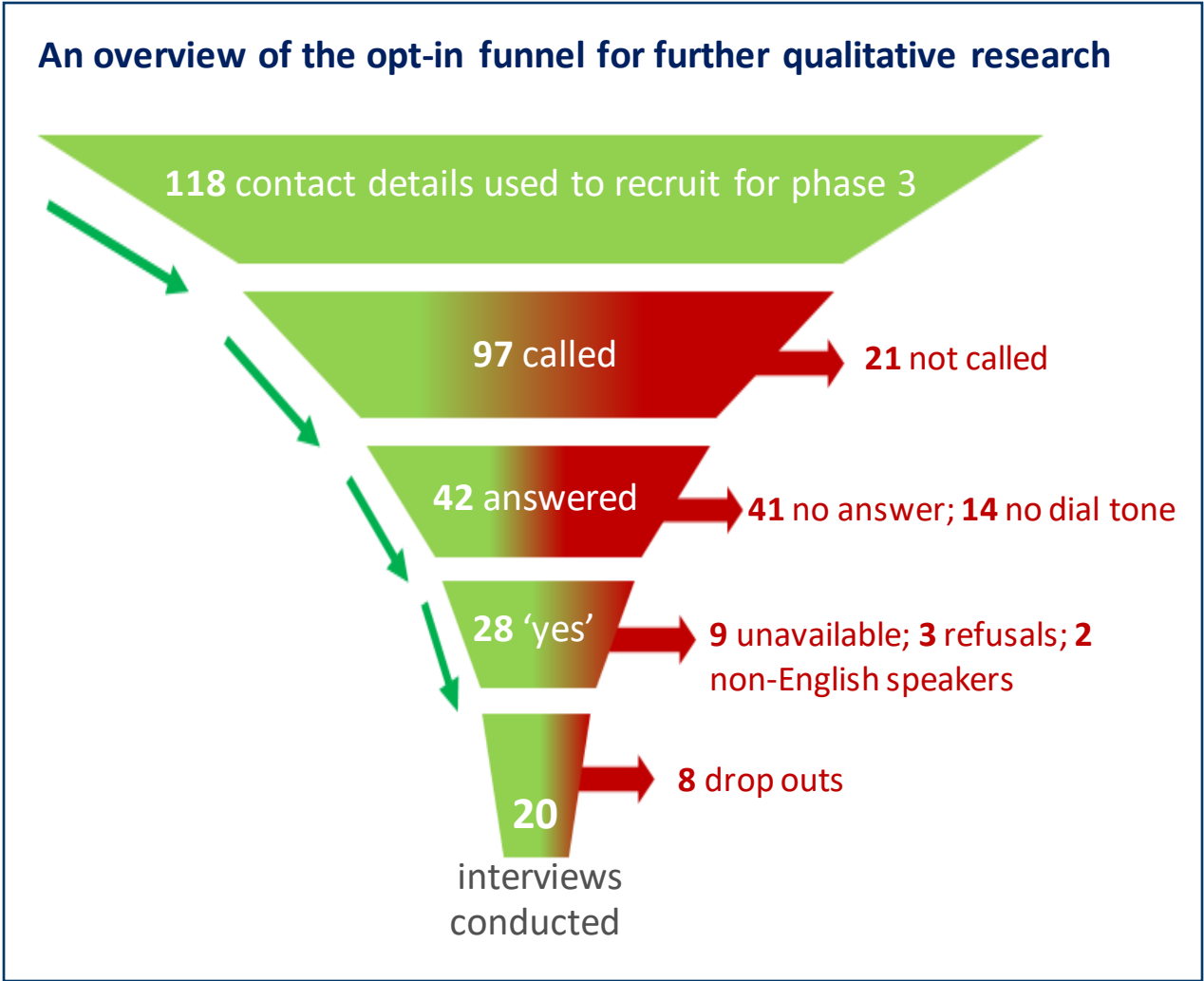
Just so you're aware, the call will come from an unknown number so please be sure to take all calls during this time.

- ✓ This was well received over phone, and only 8 booked-in respondents did not answer the call at a pre-specified time.

As a thank you, you will be given a £30 love to shop gift voucher as a thank you, for taking part.

- ✓ The reception to the voucher was warm at the point of sign up, but not a core driver of taking part in the research; many drivers stated they would give it to their partners, and very few asked about them during the interview.

Recruiting the Sample



- Recruitment ran from the 3rd – 14th March, with a response rate of 21%. 20 took part, out of 97 contacted. Overall, 363 opted in to the qualitative phase, but because of the ongoing nature of recruitment, we used a list of an initial 118 opt-ins. The 118 signed up before qualitative recruitment began on the 3rd March, though the survey continued in field until the 15th March, thus collecting further participants. These participants were contacted for phase 4 of the research.
- Of those who dropped out after agreeing to take part, most did not answer the phone when contacted for the interview and so we were unable to establish a reason why. However, researchers were able to glean insights as to why drop-outs may have occurred through those who answered the phone and rescheduled the meeting time, instead of choosing not to take part. Common reasons given amongst this group included:
 - Having to change plans during the day;
 - Being out of signal;
 - Not being able to stop at the agreed scheduled interview time;
 - Simply forgetting.
- Positively, respondents were still responsive and willing to participate despite some taking part in all three phases of the research (quantitative survey, qualitative interview, and diaries).

Final sample quotas

BMG were able to fulfil the majority of hard quotas, with the exception of EU drivers. It was more difficult to achieve the softer quotas as fewer drivers opted-in to further research, so there were fewer of them to try to recruit from.

Description		Number opted in	Desired number of interviews	Completed	Difference
Hard quotas					
Gender	Male	340	16	16	0
	Female	7	4	4	0
Length of time driving	More than 9 years	228	10	9	-1
	Less than 9 years	135	10	11	1
Type of Driver	Overnight drivers	287	12	13	1
	Day-drivers	75	8	7	-1
Nationality	Other Nationality	55	4	1	-3
	UK drivers	308	16	19	3
Soft quotas					
Employment	Agency driver – working for different companies	8	6	2	-4
	Agency driver – working for one company	15	6	0	-6
	Employee of one company	318	8	18	10
Weight of Vehicle	Heavy/Large Goods Vehicle 7.5 tonnes and over	356	15	20	5
	Heavy/Large Goods Vehicle 3.5-7.5 tonnes	7	5	0	-5
Type of Vehicle	Non-curtain sided vehicle	181	12	8	-4
	Curtain sided vehicle	178	8	12	4

- Though fewer women took part in the quantitative phase and therefore fewer opted in to further research, we focussed efforts on securing the target of 4 interviews.
- EU drivers were less likely to agree to further research once contacted due to concerns about their language abilities. They advised our recruiter that they would feel uncomfortable taking part in a telephone interview.
- Natural fallout from the quantitative survey, and therefore opt-in rate, meant that the softer quotas were more difficult to fill.

Reception from Participants

- Positively, once recruited, the majority of participants were keen to take part and were engaged during the conversations, and happy to run to 45 minutes in most cases. Their life on the road often led to them being happy and eager to speak with someone, especially after a long shift of solitary driving.
- The majority of interviews with overnight drivers took place whilst they were staying in their cabs for the night; some took place with overnight drivers once they were at home or on their days off, and day drivers spoke to us when at home. No drivers spoke to us whilst on their 45 minute break.
- Drivers responded well to questions. They were happy and willing to share their experiences with us as researchers. There were no incidences of drivers reporting a question as being inappropriate for them.
- However, as a group, drivers do not appear to be particularly reflective and are happy just to do their work without considering how things could be improved for them. To illustrate, there was little interest in how the research would be used or what changes could be implemented.
- As a result, the guide overran because additional probing was required throughout the discussion to allow for drivers to think about issues that were not top-of-mind. Probing was utilised for the majority of questions, rather than 'just-in-case' prompts for the moderator, and scenario-based lines of questioning helped to unearth more thought-out responses.

"Nah I've got all night! You go ahead! I used to chat to my wife as I went, but since she died it's nice to have someone to talk to."

"Yep I've got all night now so it's a good time to talk, I'm just parked up and eating a curry in my cab."

"It's my day off so I've just finished cutting the grass and thought now would be a good time to talk to you!"

Data analysis

Approach

- All themes and findings that have been reported have emerged ‘organically’ through the research, rather than through hypothesis testing. This is called the ‘grounded theory’ approach.
- To ensure a robust analysis, we first conducted a topline review of moderator notes and listened to recordings to find key themes, categories, and topics emerging.
- Once these themes were identified and reported, we went over all recordings and notes to collate the evidence and find the depth and breadth of impact behind each theme. The amount of times issues were mentioned were then written into the report to indicate the prevalence of opinion.
- This phase also ensured that the initial themes were robust and correct, as well as allowing the research to build on findings or understand any nuances or explain any contradictions found in the data.
- Last, we analysed interview data at an individual level to determine if any demographic differences emerged (including gender, length of driving, and type of vehicle driven).

Benefits and Limitations

- Though few demographic differences across pre-set quotas emerged, this approach allowed us to identify patterns amongst different groups not in the original quota brief, such as value of load carried, and personality-type.
- The grounded theory approach does make the overall findings more robust, but it did not test quantitative hypotheses. Positively, despite analysing results to ‘match-up’ to quantitative data, similar themes emerged, and information was complementary, rather than contradictory.
- The iterative process of analysis ensured that there was no unconscious bias on the part of the researcher, and that each finding identified was evidence-based.

Phase 3 complements the quantitative findings, adding value in a variety of ways

<p>Contextualises quantitative findings</p>	<p>Readers often interpret quantitative findings from their own standpoint, particularly in this case where few readers would have driven lorries themselves; the qualitative research combats this by contextualising driver psyche.</p>	<p><i>See ‘The Lorry Driver Context’ section of the full report, where qualitative information contextualises why drivers’ personalities make them less likely to be dissatisfied with services</i></p>
<p>Exemplifies information</p>	<p>Quantitative information showed that drivers want healthier food; examples of the kinds of food that are healthy were given during qualitative interviews.</p>	<p><i>For example, drivers suggest that carbs during the day made driving difficult in the afternoons as they become tired. While salads are healthy and often available, drivers shunned these too as they want hot, healthy meals in the winter.</i></p>
<p>Strengthens findings</p>	<p>Quantitative findings are statistically robust, but there is a limitation in using just this methodology as answer options are limited to questionnaire design. Where information is complemented by qualitative findings where drivers are able to state opinions using their own words, the quantitative data is strengthened.</p>	<p><i>The key driver analysis (see section ‘Where should improvements be prioritised in the report?’) found information that was strengthened during interviews, further evidencing where changes should be made, and the impact it would have.</i></p>
<p>Explains surprising findings or nuances</p>	<p>Quantitative data can unearth surprises, or nuances can be found in the analysis. Qualitative interviews can explain these nuances and add context to why this may be the case.</p>	<p><i>For example, overall satisfaction with individual roadside facilities is generally positive, while specific features are rated less positively. The driver decision-making processes and selection bias identified in the qualitative research explains this.</i></p>
<p>Adds new information</p>	<p>The quantitative survey was designed from a current knowledge base (e.g., we know drivers want more parking and better food options), but the qualitative interviews identified more areas for improvement.</p>	<p><i>For example, shaded parking or higher hedges needed for parking areas (to detract thieves) was not an option in the quantitative survey. Interviews highlighted these areas for improvement.</i></p>

Phase 4: Driver diary

Response to the diary

308 (17% of Phase 2 respondents) agreed to participate

- 292 were invited (with the remainder held back for Phase 3)
- 170 (58%) did not open the email including 30 that came back as non-delivered.
- 121 (41%) clicked on the survey link
- **73 (25% of those invited and 60% of those who'd clicked on the link) completed at least one day of the diary**

Of the 73 drivers that completed the diary at all

- **53 (73%) completed 5 days**
 - 2 completed 4 days
 - 4 completed 3 days
 - 3 completed 2 days
 - 11 completed 1 day
- **This gave us a total of 302 days of diary completions**

From these 302 days of diary entries, feedback was provided on a total of 367 stops:

- 79 for Truck Stops;
- 181 for Motorway Service Areas;
- 38 for 'A' Road services;
- 30 for laybys;
- 16 for industrial estates;
- 12 for distribution centres/drop off points;
- 11 for home/other.

The numbers of drivers making **multiple stops per day** was fairly consistent across all 5 days of the diary:

- 10 drivers recorded more than one stop per day on Day 1 (6 recorded 2, 3 recorded 3 and 1 recorded 4)
- 10 drivers recorded more than one stop per day on Day 2 (5 recorded 2, 4 recorded 3 and 1 recorded 4)
- 9 drivers recorded more than one stop per day on Day 3 (5 recorded 2 and 4 recorded 3)
- 10 drivers recorded more than one stop per day on Day 4 (7 recorded 2, 2 recorded 3 and 1 recorded 4)
- 12 drivers recorded more than one stop per day on Day 5 (10 recorded 2 and 2 recorded 3)

Profile of Phase 4 Diary respondents vs. Phase 2 Intercepts

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

Annexes

Survey materials

Phase 2 questionnaire



Phase 2 questionnaire

QR code postcard



QR code postcard

Postal survey



Q2259 - Questionnaire - clean.pdf



Q2259 - exd Q29 - Questionnaire - clean.pdf

Letter of authority



LonyDriversFacilitiesSurvey_BonaFidesLetter_clean.pdf

Phase 3 topic guide

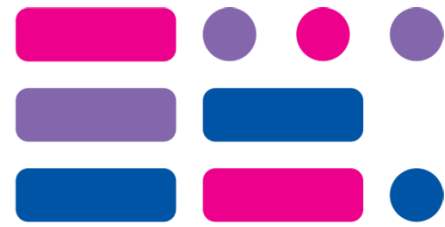


Phase 3 topic guides

Phase 4 questionnaire



Phase 2 questionnaire



BMG

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