

# Lorry drivers and roadside facilities: the user experience

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transportfocus 

# Background

**Transport Focus intends, through a new ongoing survey, to measure lorry drivers' experiences using roadside facilities on England's motorways and major 'A' roads. That is, at motorway service areas (MSAs), at truck stops and at 'A' road services.**



In the UK, lorry drivers transport more than 80 per cent of goods, playing a vital role in our economy and society. Yet we know that they are less satisfied than others with their experience at the roadside facilities needed to do their job.

Organisations in the freight sector tell us that the quality of roadside facilities contributes to driver recruitment and retention challenges, including among women. We therefore welcomed the £32.5 million investment by Government through the 2021 Spending Review. This was supplemented by £20 million from the current Road Investment Strategy allocated to National Highways 'designated funds'.

By benchmarking the lorry driver experience from site to site, and between different businesses providing services, Transport Focus will help drive up standards. We know from other sectors that benchmarking user experience gives added customer focus. The new survey, developed in conjunction with the Department for Transport, will also help the services sector, National Highways and Government target their investment most effectively.

This report summarises the testing we have undertaken and the insight we have gathered while doing so. We are currently refining our approach to conducting the survey on a much larger scale. Subject to funding, we will roll it out later in the financial year, 2022/23.



# What we did

**Between February and March 2022 we tested different, complementary approaches to capturing feedback from lorry drivers at a range of roadside facilities.**

Thank you to the businesses that facilitated surveying on their premises, to the industry experts who provided guidance and a 'sense check' of our findings, to the Department for Transport for its input, and to the lorry drivers who took part. The approaches tested were:

## **1. A quantitative survey of lorry driver experience at particular roadside facilities**

- 1797 interviews were conducted across 120 shifts at 20 different sites.

## **2. Qualitative interviews with lorry drivers**

- In-depth interviews with 20 lorry drivers.

## **3. A diary survey to gather 'on the ground' feedback from lorry drivers**

- 367 surveys were completed by 73 lorry drivers.

In addition to this summary, a full research agency report is available on our website.



# Key findings

**This work was intended primarily to test the effectiveness of different methods, rather than produce robust representative insight. That said, we gleaned useful information from lorry drivers which we summarise below.**

- Lorry drivers' needs when stopping at roadside facilities are fairly straightforward. They stop because it's a legal requirement and to use the toilet, to eat and to buy fuel. Some need a nine-hour statutory break from driving, generally taken overnight.
- Just one in five of the lorry drivers we interviewed were satisfied with the quality and quantity of facilities available to them in the UK, with over half actively dissatisfied.
- Overall satisfaction with the sites visited is relatively high – potentially because drivers select sites they like, and so score them well, but this needs further exploration.
- Truck stops are tailored to lorry drivers' needs and are well regarded, which is reflected in high levels of satisfaction. 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.
- Scores at motorway service areas (MSAs) we visited were lower and varied more. They are meeting many of the same needs as

truck stops, but are focused more on the needs of drivers of other vehicles.

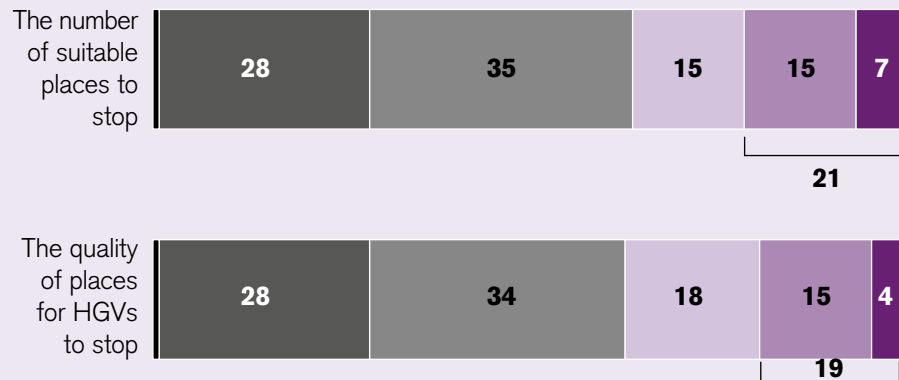
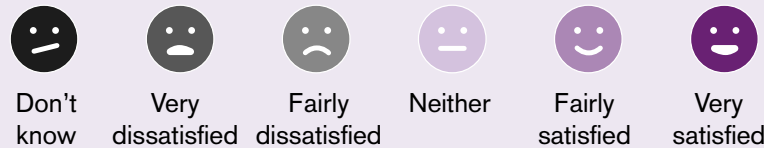
- 'A' road services are more limited in what they offer, but are used for simpler needs which are relatively straightforward to meet.
- A core driver of satisfaction is feeling valued. The improvements lorry drivers want to see (to food, showers, security, parking, and so on) tend to be about issues that disproportionately impact them rather than the general road user.
- Almost half of lorry drivers we spoke to felt their experience at services had got worse recently. Partly because of increased theft from vehicles and partly because of lingering annoyances about their experiences during Covid-19 (when services scaled back their offer/shut certain facilities).



# Current provision

**One in five lorry drivers were satisfied and six in 10 were dissatisfied with the number and quality of places for HGVs to stop.**

## Satisfaction with UK roadside facilities in general



Base: 1797 lorry drivers.

This view was more prominent among drivers based in the UK, where only one in seven were satisfied with the number, and one in nine were satisfied with the quality. Experienced drivers, those who have been in the profession for more than ten years, were also less satisfied (one in seven were satisfied with both the number and quality of places to stop).

Qualitative interviews suggested this was driven partly by the perception that roadside facilities have worsened recently, with theft and vehicle security most commonly cited as a serious and widespread issue.

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

Other commonly mentioned issues were fewer lorry driver-centred services available and fewer alternative places to stop. Drivers said they used to have more choice, such as laybys with toilets and refreshments, or industrial estates.

*"They used to be quite happy to let you park up [in industrial estates] but now they've put double yellows all over."*

# Overall satisfaction

**Overall, satisfaction at the individual sites we visited was relatively high, with the truck stops coming out on top.**

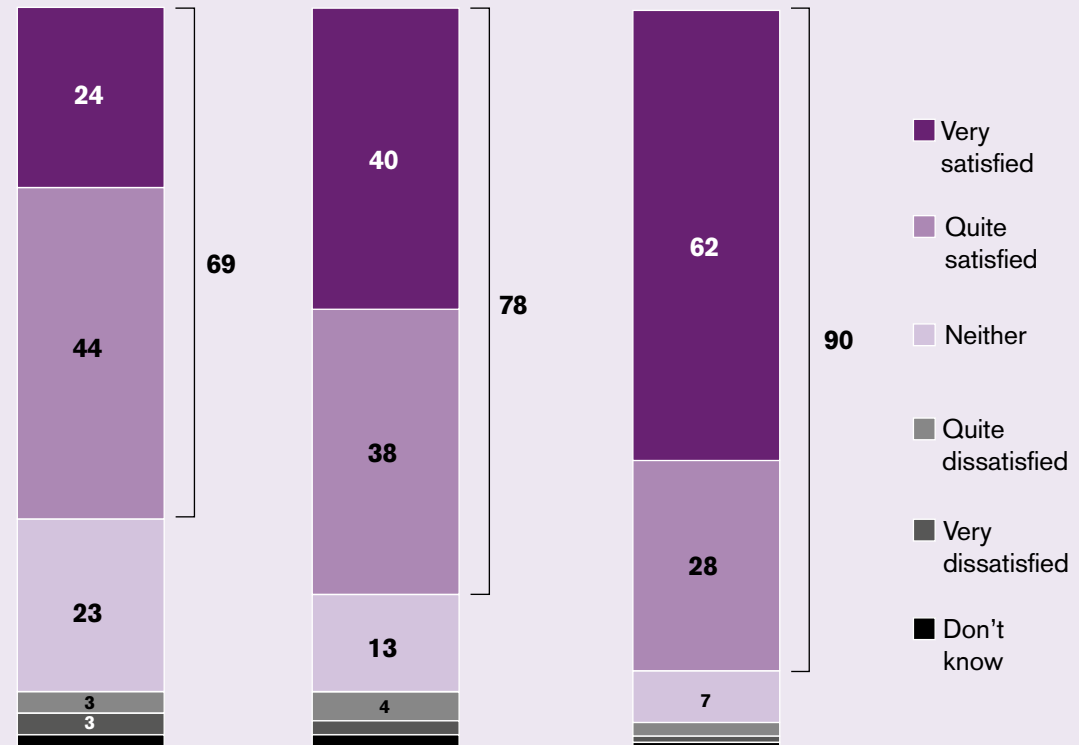
Truck stops were also the preferred place to stop among participants in the qualitative study.

## Overall satisfaction with the site (%)

Motorway service areas

'A' road services

Truck stops

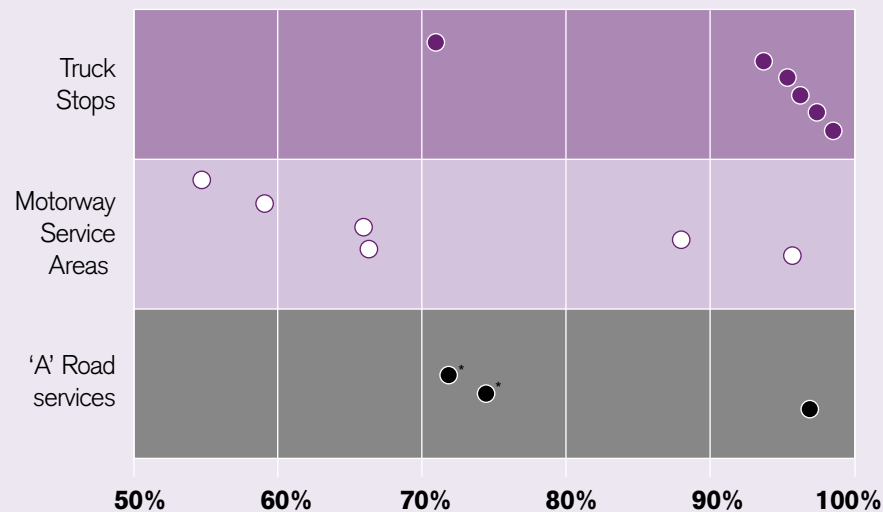


Base: 1797 lorry drivers (647 at MSAs, 201 at 'A' road services, 949 at truck stops)

## Overall satisfaction

Most truck stops were rated highly, whereas MSAs scored lower and there was more variation. Our testing did not produce sufficient responses for most 'A' road services, given their smaller size and lower footfall. We show the score for three, although please note our caution below regarding sample size.

Graph showing satisfaction across individual sites



\* Sites with sample sizes below 30 are not shown. Sites with small sample sizes (between 30 and 50) have been marked with an asterisk. Caution should therefore be used in drawing conclusions.

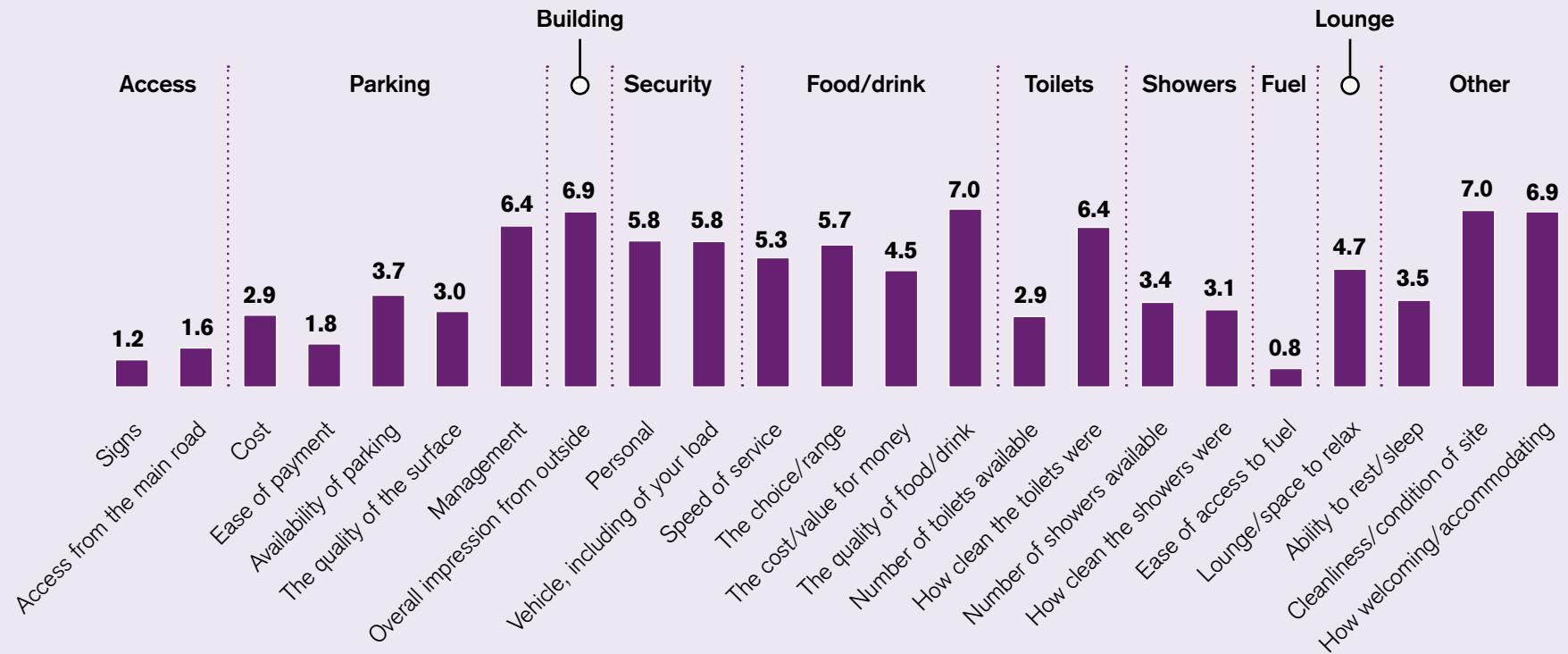


Given drivers' low overall satisfaction with the number and quality of facilities in the UK, it is perhaps surprising to see fairly high levels of satisfaction at individual locations. There are several factors, discussed below, which may have influenced this and which we will explore further.

- Drivers' needs are fairly simple and therefore relatively easy to satisfy.
- Drivers are more likely to stop at places they like, and therefore rate them more highly.
- Planned stops achieved higher satisfaction (87 per cent) than unplanned stops (72 per cent), and more of the stops in our sample were planned (six in 10) than unplanned (four in 10).

# Facilities that are most important to lorry drivers

Factors with greatest influence on overall satisfaction (% impact)

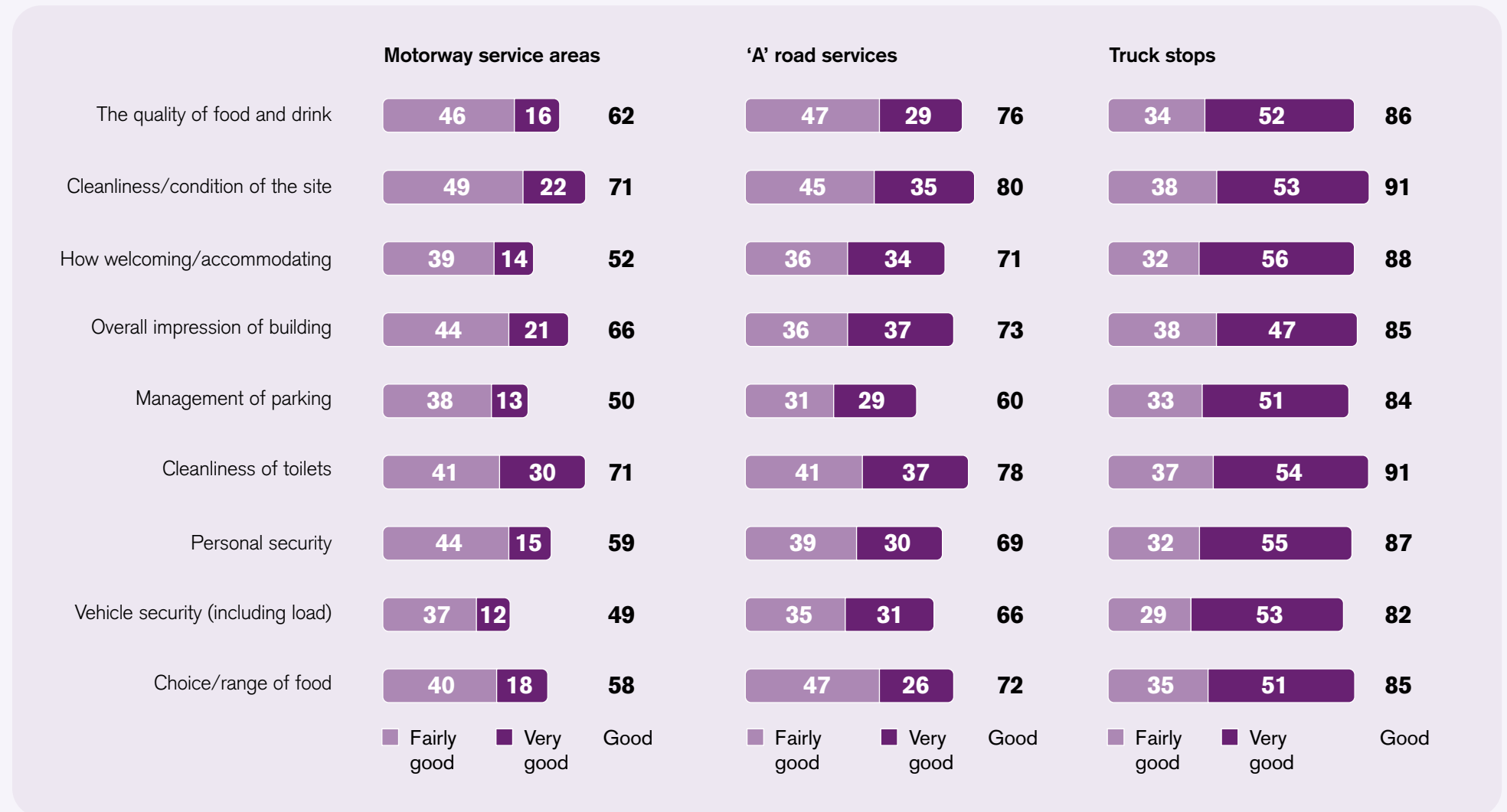


Based on key driver analysis. Base: 1797 lorry drivers (647 at MSAs, 201 at 'A' road services, 949 at truck stops)



## Facilities that are most important to lorry drivers

### How lorry drivers rated the nine factors with greatest influence on overall satisfaction (%)



# Considerations when stopping

## Lorry drivers want facilities that are easy to access and cater directly to them.

The qualitative interviews explored lorry drivers' key considerations when stopping. The main reason for stopping is when drivers are aware that the time for their legal break is approaching.

Their needs differ depending on the type of stop they make. Shorter stops are generally taken during the day and longer stops at night, but this may vary depending on the shift.

Those making short stops tend to be looking to use toilets and grab something to eat. Given that they are limited for time, the proximity of these facilities to the lorry parking area is a key consideration.

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

Those taking longer stops are usually looking to sleep, so the ability to park somewhere quiet, with clean showers in sufficient numbers and with good security is of high importance.

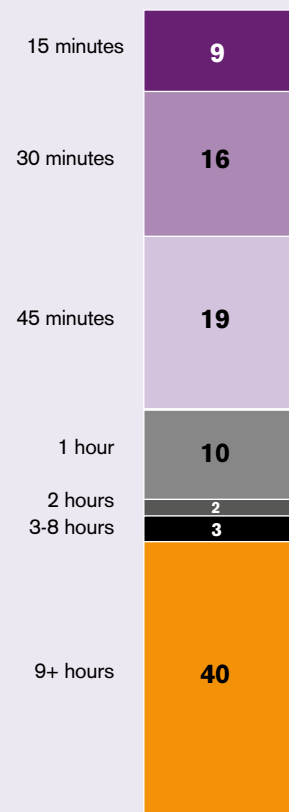
*"Only two showers for 100+ trucks washing facilities, is not suitable."*



# Drivers' needs when stopping

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

Length of stay at site (total)



## Needs for short stop

- **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 can stretch their legs during a break somewhere that isn't a parking area.

## Needs for long 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 refers just 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 whose companies do not reimburse, or who have to claim it back 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.

# Other Transport Focus insight into lorry drivers' views

**Transport Focus has carried out the following other research which includes the views of lorry drivers (or freight businesses):**

*Take a break - road users' views about roadside facilities (2016)*

*'A' road services: what users of the A3 and A34 think (2018)*

*Motorway Services User Survey (2017, 2018, 2019, 2020)*

*Logistics and Coach Survey: Strategic Roads (three times each year from October/November 2020)*

*Strategic Roads User Survey (continuous survey)*



## Contact Transport Focus

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Transport Focus is the operating name of the Passengers' Council

**Transport Focus is the independent consumer organisation representing the interests of:**

- bus, coach and tram users across England outside London
- rail passengers in Great Britain
- all users of England's motorways and major 'A' roads (the Strategic Road Network).

**We work to make a difference for all transport users.**