



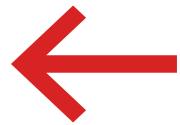
Lorry Drivers' Facilities Survey

Year 2 Summary Report

December 2025



Foreword



Road freight is the backbone of the UK economy. In 2024, HGVs registered in Great Britain carried 1.59 billion tonnes of goods and travelled 19.4 billion kilometres within the UK¹. This scale of activity underpins supply chains for retail, manufacturing, construction, and essential services—without it, the economy would stall.

Behind these numbers are the lorry drivers who keep shelves stocked and businesses running. Their work is safety-critical, yet many face daily challenges when stopping to rest, refuel, and recharge. Facilities are often inconsistent, inadequate, or unsafe, making it harder for drivers to do their job and maintain wellbeing. Improving conditions is not just about supporting drivers—it's about safeguarding the flow of goods that powers growth and sustains everyday life.

This report forms part of a three-year programme led by Transport Focus to improve understanding of HGV driver experiences and drive improvements across the roadside facilities network in England. Each year, our Lorry Drivers' Facilities Survey has covered a different set of sites to capture a broad picture of conditions across England, rather than tracking the same locations throughout.

Over the past two years, Transport Focus has listened to over 13,000 HGV drivers. Their message is clear: while some sites offer excellent service, the overall network falls short. In this Year 2 report, we highlight the growing gap between individual site satisfaction and broader perceptions of the network—a gap driven by variability in parking availability, security, and the quality of amenities.

Truck stops continue to lead the way, consistently scoring high for satisfaction. But other sites, such as motorway service areas (MSAs) show wide disparities, with some falling far below acceptable standards. Consistency matters—variability in standards is a problem that impacts drivers every day. Drivers need to feel safe, supported, and respected—every time they stop.

Security is a critical concern. Our latest findings show a strong link between how secure drivers feel and their ability to rest. Nine out of ten drivers who rated vehicle security as good also felt able to rest or sleep well. By contrast, fewer than four in ten felt they could rest when they perceived vehicle security to be poor.

There is also a strong link between scores for vehicle and personal security: 95 per cent of those who rated vehicle security as good also rated their personal security as good, compared to just 16 per cent among those who rated vehicle security as poor. These powerful statistics underscore just how deeply perceptions of safety impact driver wellbeing. Driving HGVs is a safety-critical role; improving facilities is not just about driver welfare but about protecting everyone who uses the road network.

Our findings reflect wider industry challenges. According to the Road Haulage Association, the UK will need 60,000 new HGV drivers annually for the next five years to meet demand², with an ageing workforce and retention issues posing significant risks to supply chain resilience. Recent government data shows that 24% of HGV businesses reported driver vacancies in late 2024, with many drivers either leaving the industry or retiring³. Security concerns are also critical: the National Vehicle Crime

Intelligence Service reports that freight crime cost UK hauliers £111.5 million in 2024, with organised crime groups increasingly targeting lorries at vulnerable locations⁴. These external indicators reinforce the urgency of improving both driver welfare and site security.

Since our first survey, the Department for Transport and National Highways have begun delivering up to £69.5 million in joint government and industry funding to improve lorry parking and driver welfare facilities across England⁵. However, there is still a way to go, and it will take time for this investment to translate into better satisfaction. Our results underline the need for continued and targeted investment, particularly where standards have lagged.

In response to our Year 1 findings, Transport Focus hosted a roundtable bringing together key stakeholders to explore practical solutions for improving capacity, quality, and security. This has led to a 12-month action plan, with partners taking the lead on specific initiatives to address key issues. We will report on progress in the months ahead.

Encouragingly, we are seeing positive examples of innovation and commitment from site operators and industry partners. But as perceptions among drivers show, there is still work to do. We cannot afford to be complacent. Continued focus and collaboration are essential – not only to support lorry drivers themselves but to sustain the vital flow of goods that underpins our economy and daily lives.

Louise Collins, Director

Transport Focus



Footnotes

1. [Domestic road freight statistics, United Kingdom: 2024 - GOV.UK](#)
2. [60,000 HGV drivers needed every year](#)
3. [Heavy goods vehicle driver vacancies in the United Kingdom: 2024 - GOV.UK](#)
4. [Freight crime spirals out of control as value of goods stolen rises to over £100 million](#)
5. [Written questions and answers - Written questions, answers and statements - UK Parliament](#)



The national picture

It is worth bearing in mind at the outset that our three-year programme of research started in 2023, and this has coincided with significant investment in improving facilities, through matched funded schemes supported by DfT and National Highways.

Around a third of sites included in this year's survey have received funding for driver welfare, security and/or parking capacity enhancements.

The timing for the fieldwork period for the 2024/25 survey meant that many sites which had already received a commitment for investment were still implementing the improvements and, therefore, drivers could not be expected to have noticed change.

Nevertheless, there was some evidence that improvements have been noticed by drivers.

For example, when reflecting on their experiences of facilities in the UK, 72 respondents commented having noticed enhancements to toilets and/or showers and 56 others commented that generally sites were improving, but there was also a caveat that more was needed to be done.

"I feel improvement has been made. Some truck sites have new facilities."

(Male, 45-54 years old, 20+ years' experience)

"Certain ones are making bigger lorry parks. A lot have put on better security."

(Male, 35-44 years old, 5-9 years' experience)

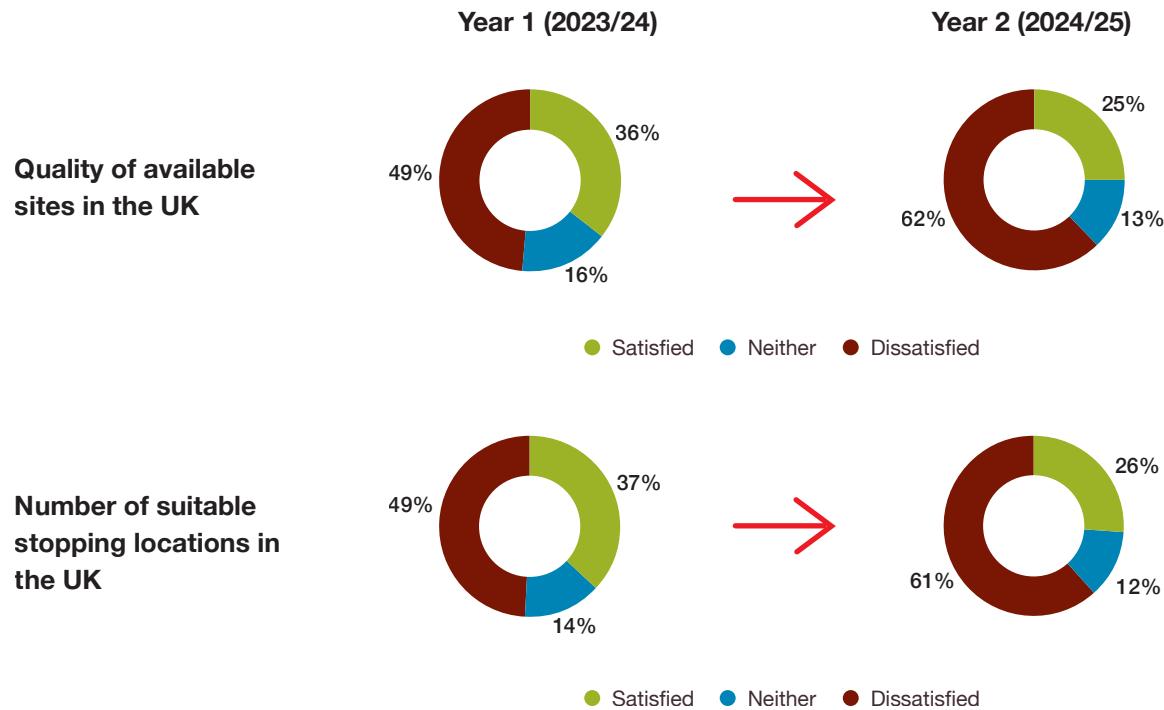
"Some are doing up showers but not enough is being done."

(Male, 55-64 years old, 20+ years' experience)



In the latest survey, **62 per cent of drivers expressed dissatisfaction with the quality of available sites in the UK**, while **61 per cent were unhappy with the number of suitable stopping locations**.

These figures have increased since the previous survey, suggesting that concerns are deepening rather than improving.





Drivers' priority areas for improvement

These worsening perceptions reflect tangible, recurring issues that drivers face daily. Across both years of the survey, drivers have consistently identified four areas that must be addressed to improve their experience:

Parking capacity that meets demand

Lorry drivers need enough spaces in the right locations to rest, access facilities, and comply with legal requirements on driving hours. Current provision often falls short, with many sites full and some bays too small for modern HGVs. 28% of drivers who said facilities worsened or stayed the same in the past year mentioned parking and the need for more sites (the single most mentioned theme).

"I feel that most motorway services lack enough HGV parking. I understand that you can't get everyone in, but the services just cram the spaces together. I drive a car transporter, and the bays aren't big enough. Even though it's a standard UK manufactured truck."

(Male, 25–34 years old, 10–19 years' experience)

Safety and security for drivers and vehicles

Better and more visible security measures at sites are essential—not just for protecting cargo but for enabling drivers to rest and feel safe. **9 in 10 drivers who rated vehicle security as good also felt able to sleep well.** There is also a strong link between scores for vehicle and personal security: **95% of those who rated vehicle security as good also rated personal security as good, compared to just 16% among those who rated it poor.**

"More and more lorries are losing their loads through theft at night because places don't have any security. No cameras or anyone walking round."

(Male, 55–64 years old, 20+ years' experience)

Better and consistent quality of services

Drivers expect clean toilets and showers, comfortable rest areas, and affordable, varied food and drink provision. Standards can vary widely, creating frustration. Of the 22 factors that we asked about, value for money of food and drink received the lowest rating from drivers (62 per cent), with site specific scores ranging between 18 and 98 per cent.

"Just hate this job now. It's getting too expensive. I spend about £70 a week just on food and coffee at these places. It ought to be subsidised for lorry drivers."

(Male, 55–64 years old, 20+ years' experience)

A welcoming environment

Drivers want to feel respected and valued. In Year 1, the most significant factor influencing overall driver satisfaction was how welcoming the site felt. Clean facilities, helpful staff, and clear signage make a difference. Yet many drivers still feel less valued than other customers—a perception that must change.

[MSAs] don't really want truckers. They are more equipped for cars and buses. There are safety issues for your load and self. Expensive to park, and then at your own risk. Food is junk food. Small truck stops...are much better as [they are] cheaper, good food, and truckers are welcome."

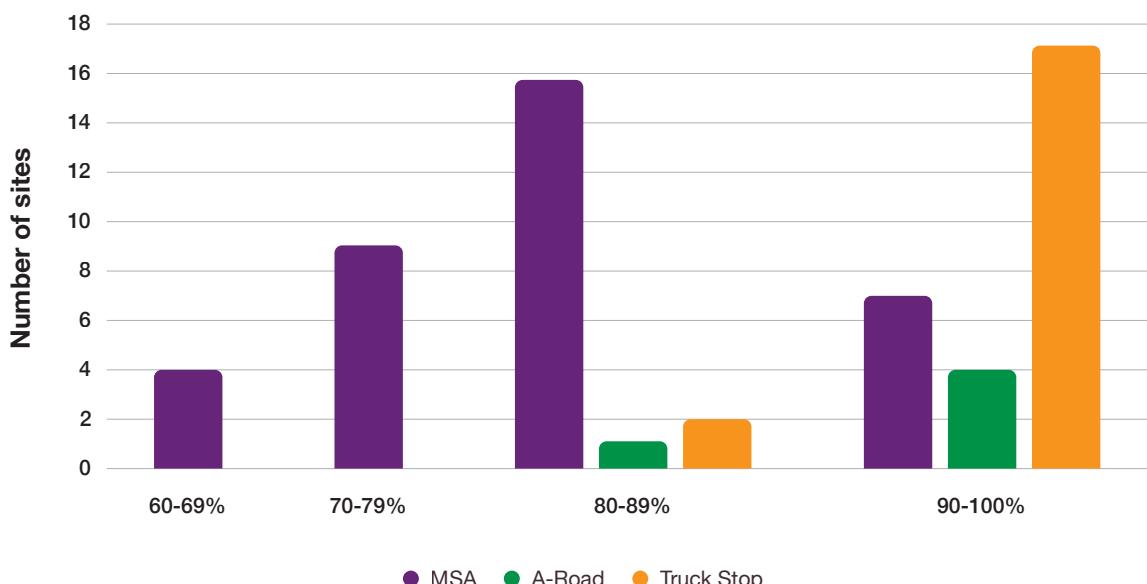
(Male, 45-54 years old, 20+ years' experience)

Site-level insights

The results show that satisfaction levels vary significantly depending on the type of site visited. While general perceptions of the network are poor, individual site visits often yield positive feedback, particularly at truck stops, which consistently outperform other facility types.

For example, in this year's survey, no truck stop scored below 84 per cent for overall satisfaction. While some Motorway Service Areas (MSAs) also received high ratings—up to 94 per cent, the lowest scored just 61 per cent.

Overall satisfaction by site type (2024/25)



Two sites with small samples (<60 responses) removed from table above (namely, Woodside Cafe A614 & Newark Lorry Park).

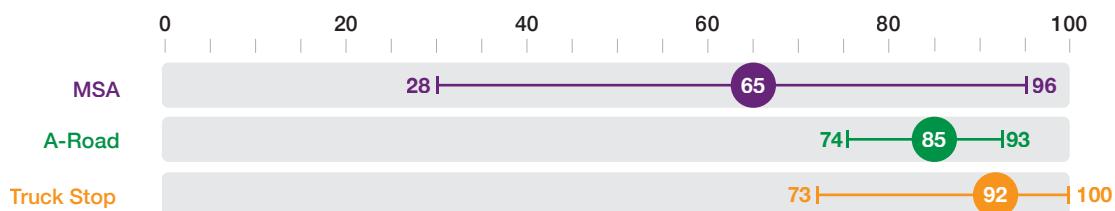
It is important to recognise that site types vary considerably in their business models. Truck stops, for example, are often dedicated to serving HGV drivers and typically offer tailored amenities such as gated parking, showers, and food options that cater to long-haul needs.

In contrast, MSAs and A-road services serve a broader mix of customers—including families, commuters, and leisure travellers—which can dilute the focus on HGV-specific needs. This context helps explain the variability in satisfaction scores and underscores the need for targeted improvements based on site type.

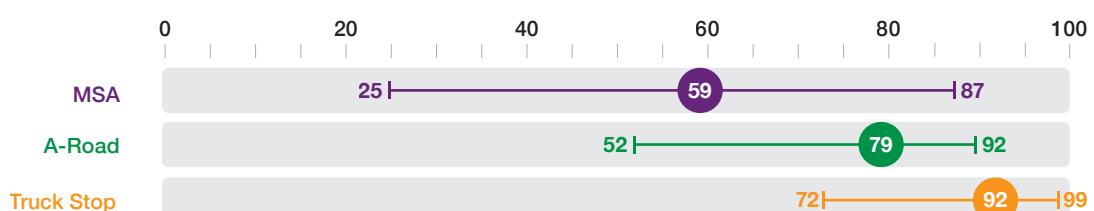
Nevertheless, the inconsistency in service quality, particularly at MSAs which are key parts of the strategic road network, leads to frustration among drivers who depend on reliable facilities.

The inconsistency is not just limited to overall satisfaction but also other factors that are critical to driver experience, including parking availability, vehicle security, and ability to rest.

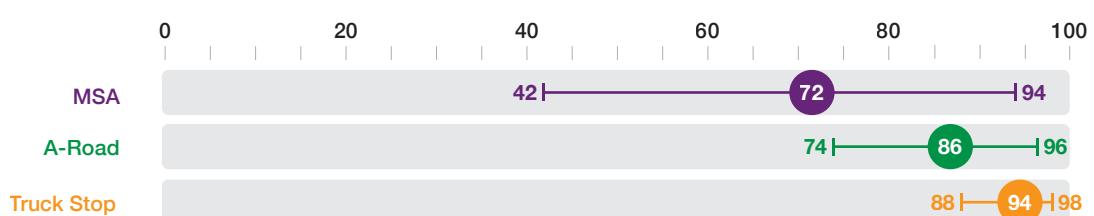
Availability of parking (% 'good')



Vehicle security (% 'good')



Ability to rest and have a good sleep (% 'good')



Charts show highest and lowest satisfaction figures by site type for selected factors. The mid-point represents the overall satisfaction score for each site type.

Indeed, at MSAs, **16 of the 22 factors surveyed showed gaps of more than 50 percentage points between the best and worst performers**, compared to **just three of the factors at truck stops**. This highlights the need for more consistent standards, especially at MSA sites.

The ‘satisfaction gap’

Therefore, while individual site ratings—particularly at truck stops—often reflect high levels of satisfaction, broader perceptions of the network remain poor. This disparity can be referred to as the **‘satisfaction gap’**: the difference between the generally positive experiences drivers report at specific roadside facilities and their overall dissatisfaction with the UK’s wider network.

This gap reflects the lived experiences of drivers navigating a patchwork of inconsistent standards. Our qualitative research identified two related factors contributing to this disparity:

1. **Selective stopping behaviour:** As far as possible, drivers usually choose where to stop based on their own preferences and experiences. Only one per cent of drivers who we interviewed stopped at that specific site because they were told to by an operator.
2. **Variable expectations based on journey context:** Drivers’ expectations of roadside facilities vary journey to journey. Those on longer trips or carrying valuable goods tend to seek out facilities that better meet their requirements—like secure parking and showers—even if it means going off-route. In contrast, drivers on shorter journeys typically have fewer needs and by extension lower expectations, often prioritising convenience.



Industry initiatives and persistent challenges



Through engagement with site operators, Transport Focus has identified both examples of good practice—where industry investment and innovation are making a difference—and areas of persistent challenge.

These insights are illustrative rather than exhaustive, reflecting themes from our conversations, rather than capturing the full breadth of activity or variation across the sector.

Parking

Many facilities continue to operate at or near full capacity, with expansion often constrained by land availability, planning restrictions, or funding limitations. Temporary reductions in capacity due to infrastructure works further exacerbate the issue. Surface quality and drainage remain persistent challenges, particularly at older sites or those located in flood-prone areas.

In response, operators are exploring innovative approaches to improve capacity and efficiency. For example, Extra uses dynamic parking arrangements at many of its service areas, reallocating underused spaces during quieter traffic periods to accommodate more lorries. At certain sites, this approach can double HGV parking capacity without requiring permanent infrastructure changes, improving convenience and safety for drivers while making efficient use of available space.

Security

Operators have responded with a range of measures, including enhanced surveillance systems, gated access, and night patrols. Increasingly, advanced technologies such as thermal imaging and AI monitoring are being deployed at some high-risk sites to improve detection and response capabilities. These developments aim to create safer environments for drivers, reduce crime impact, and support long-term improvements in site management and driver welfare.

However, structural limitations—such as the requirement for multiple entry and exit points at MSAs—can hinder full site enclosure, reducing the effectiveness of physical deterrents. While investment in infrastructure is happening, it does not always result in the visible deterrents that drivers tend to value most, such as improved lighting, and regular patrols.

Food and drink provision

Operators often grapple with balancing the delivery of high-quality food and keeping prices affordable. While enhancements can result in increased costs, proposals such as leasing space to independent vendors or diversifying menu options highlight efforts to better serve drivers. However, progress can be slow, often hindered by commercial constraints or staffing limitations.

Some operators have introduced targeted initiatives to improve affordability and choice. For instance, Roadchef has launched a 'Tacho Meal Deal', offering a hot meal at a discounted price of £5.99 to members of its Truck Masters Club. This initiative supports drivers during their legally required 45-minute rest breaks and reflects a growing recognition of the need for tailored offers.



Creating a welcoming environment

A welcoming environment plays a vital role in driver satisfaction and overall site experience. Our engagement with site operators has highlighted the importance of clean, well-maintained facilities, positive staff interactions, and clear signage in shaping perceptions of a site. Drivers consistently value sites where they feel respected, safe, and supported—especially during long rest periods or overnight stays.

Efforts to improve include refurbishments of toilets and showers and the introduction of amenities such as gyms and driver lounges. Beyond this, Newark Lorry Park, operated by the local authority, is exploring innovative ways (including driver 'apps') to better connect drivers with nearby services and the wider community. These initiatives reflect a growing recognition that a positive environment is not just about infrastructure—it's about creating spaces where drivers feel welcome, rested, and valued.



Driving change forward

The Lorry Drivers' Facilities Survey continues to highlight the variation in satisfaction across roadside facilities. While targeted investments and innovations are making a difference at select locations, the overall experience for drivers remains inconsistent. This is a source of frustration for drivers and negatively affects perceptions of the network as a whole.

Encouragingly, our engagement with operators has revealed promising examples of good practice, from dynamic parking solutions to tailored meal deals and upgraded amenities. However, persistent challenges remain, particularly around consistency, visibility of improvements, and the pace of change.

Looking ahead, Transport Focus will continue to work with industry partners to drive progress. Our next phase includes monitoring the delivery of the 12-month action plan, sharing updates on stakeholder commitments, and deepening our understanding of driver needs through ongoing research.

Ultimately, improving roadside facilities is about more than infrastructure—it's about valuing the skilled professionals who keep Britain moving. This report is both a reflection of current realities and a call to action: to build consistency, raise standards, and deliver the respect and support that lorry drivers deserve.



Overall satisfaction by site (%)

Site ranking	Site name	Site type	Overall satisfaction
1	Junction 31 Secure Parking (M1 Sheffield)	Truck stop	100%
2	Exelby Services Ltd - Coneygarth	Truck stop	100%
3	Exelby Services (Golden Fleece)	Truck stop	99%
4	Lodge Farm Café	Truck stop	99%
5	Portsmouth - Farlington Truckstop	Truck stop	99%
6	Junction 29 Truckstop (M1 Derbyshire)	Truck stop	99%
7	Midway Truckstop	Truck stop	98%
8	Welcome Break Rothwell	A-Road	98%
9	Ulceby Truckstop	Truck stop	97%
10	Roadking (The Hollies)	Truck stop	97%
11	The Stockyard Truckstop	Truck stop	96%
12	Truckers Rest	Truck stop	96%
13	Anglia Motel	Truck stop	96%
14	Chippenham Pitstop	Truck stop	95%
15	Junction 38 truckstop (Tebay)	Truck stop	95%
16	Crewe Lorry Park Cowley Way (Crewe Truck Stop)	Truck stop	95%
17	Westmorland Gloucester Southbound	MSA	94%
18	Motis Truckstop	Truck stop	94%
19	Cornwall services	A-Road	93%
20	Junction 26 Truckstop (M25 Waltham Abbey)	Truck stop	92%
21	Roadchef Watford Gap Northbound	MSA	92%
22	Welcome Break Leicester Forest East Northbound	MSA	92%
23	Moto Toddington Northbound	MSA	92%
24	Moto Southwaite Northbound	MSA	91%
25	Glews Truck Stop	A-Road	90%
26	Moto Washington Northbound	MSA	90%
27	Roadchef Norton Canes (M6 Toll)	MSA	90%
28	Sutton Scotney Southbound (Roadchef)	A-Road	90%
29	BP North Ferriby	A-Road	89%
30	Moto Trowell Southbound	MSA	89%

Site ranking	Site name	Site type	Overall satisfaction
31	Westmorland Tebay Northbound	MSA	89%
32	Avon Lodge	Truck stop	89%
33	Extra Peterborough	MSA	89%
34	Roadchef Clacket Lane Westbound	MSA	88%
35	Welcome Break Corley Eastbound	MSA	88%
36	Roadchef Northampton Northbound	MSA	88%
37	Welcome Break Warwick Northbound	MSA	87%
38	Moto Pease Pottage	MSA	86%
39	Moto Leigh Delamere Westbound	MSA	85%
40	Swindon Truckstop	Truck stop	84%
41	Welcome Break Keele Southbound	MSA	84%
42	Extra Cullompton	MSA	84%
43	Roadchef Killington Lake Southbound	MSA	84%
44	Roadchef Watford Gap Southbound	MSA	83%
45	Moto Birch Westbound	MSA	82%
46	Welcome Break Charnock Richard (Northbound)	MSA	80%
47	Roadchef Sandbach Northbound	MSA	80%
48	Welcome Break Hartshead Moor Westbound	MSA	79%
49	Welcome Break Membury Eastbound	MSA	78%
50	Moto Winchester {North}	MSA	78%
51	Moto Tamworth	MSA	78%
52	Welcome Break Michaelwood Southbound	MSA	76%
53	Moto Exeter	MSA	75%
54	Welcome Break Woodall Southbound	MSA	74%
55	Moto Medway Eastbound	MSA	74%
56	Roadchef Rownhams Westbound	MSA	71%
57	Moto Reading Eastbound	MSA	69%
58	Moto Ferrybridge	MSA	66%
59	Welcome Break Newport Pagnell Southbound	MSA	63%
60	Moto Heston (E)	MSA	61%



About the survey

Lorry drivers were approached at services and invited to complete a survey about their visit, along with questions about their perceptions of facilities more generally. Our Lorry Drivers' Facilities Survey runs as a three-year programme where we visit a representative third of qualifying sites each year. Qualifying sites included all Motorway Service Areas, 'A' road services and truck stops with 50 or more lorry parking spaces located within five kilometres of the motorways and major 'A' roads in England managed by National Highways. Sites with 12 to 49 spaces were also included in the sample if their utilisation was 33 per cent or higher. Sites with less than 12 lorry parking spaces were excluded from the sampling process. Fieldwork was completed between 16 September 2024 and 28 January 2025 with a pause between Sunday 22 December 2024 and 5 January 2025 to accommodate the Christmas holiday period. For further information on how we carried out this survey, please see the technical report.

In this report, lorry drivers' feedback on the individual facilities at stopping sites is presented and is reported using the measurement percentage 'good' (indicated by the shorthand % 'good'). This measurement reflects the total share of lorry drivers (excluding those who answered, 'not applicable' or 'did not use') who selected 'fairly good' or 'very good' to a particular prompt (e.g. the availability of toilets). All scores, including by site, are available to view on our data hub.

Alongside the quantitative study we ran a piece of qualitative work in February 2025 examining the stopping behaviour and expectations of lorry drivers. This research consisted of a series of group discussions with drivers that regularly stop at sites which fulfil the same criteria for inclusion in the quantitative study. We also asked a number of drivers to complete online diary exercises about their stopping patterns and spoke to a series of haulage and logistics operators to understand their role in drivers' behaviour.

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*Transport Focus is the operating name of the
Passengers' Council*

