

# Lorry Driver Facilities Survey

November 2024





# Foreword

**Lorry drivers are the backbone of our economy, ensuring that supermarkets remain stocked, hospitals receive essential medical supplies, and businesses across the country stay operational. 81 per cent of freight is moved by road, with heavy goods vehicles (HGVs) making around 160 million journeys in 2023.**

The vital role that lorry drivers play comes with significant challenges, particularly the need to adhere to strict driving regulations. These rules, designed to prevent accidents due to fatigue, require drivers to take regular rest breaks, making the availability of good quality rest stops essential for the safety of everyone on the road.

A recognition of the need for better facilities for lorry drivers has driven investment and improvement over the last few years. This new research from Transport Focus (funded by National Highways), taken alongside our recently published Logistics and Coach Survey, shows the scale of the problem that persists.

While drivers in this survey were the ones who managed to find a space, less than four in 10 were satisfied with the number of stopping places available in the UK.

Satisfaction among those who run logistics businesses is even lower. When no services are available, drivers can be forced to park in laybys or industrial estates, which frequently lack basic amenities like toilets and have little to no security. Meeting the demand for parking spaces with adequate provision is an urgent issue to be addressed.

Safety is paramount in this industry, yet many drivers feel that conditions are becoming increasingly unsafe. This survey shows significant variation between sites in terms of how secure drivers feel, with the lowest performers giving real cause for concern. The Logistics and Coach Survey supports these findings with less than two in 10 businesses thinking security at rest stops is good.

It's not just the availability of places to stop, but also the standard of rest stops that matters. Spending long hours on the road makes it a challenge for drivers to access essential facilities when they need them, and nearly half in our survey expressed dissatisfaction with the quality of places available to stop. Most of us take for granted the ability to use a clean toilet or make a hot drink whenever we need to. Lorry drivers, whose 'office' is the road network, don't have this luxury and these basic needs

often go unmet. Additionally, drivers tell us they don't always feel welcome at the places they are stopping.

Nevertheless, there are reasons for optimism, as shown by the 17 sites with satisfaction scores of 95 per cent or above. Two sites had more than 90 per cent of visitors describing themselves as 'very satisfied' - an outstanding achievement in any survey. These examples provide a benchmark for improvement, demonstrating what is possible with the right investment and attention to drivers' needs.

Better, safer facilities will not only help retain existing drivers but also attract new ones to an industry struggling with recruitment. It can't be easy to persuade people to join a profession where the current workforce feels it has become less safe, doesn't feel valued and when proper rest is not guaranteed.

In 2021 the previous government launched initiatives to address these issues, including introducing a package of measures aimed at alleviating the HGV driver shortage and providing funding to improve facilities. There are a large number of sites which have since been awarded investment through the Department for Transport and

National Highways grant schemes, and have either completed or are due to complete improvement works this year. However, for these efforts to be truly effective, there must be a renewed focus on enhancing both the quality and capacity of rest stops across the country. It is time to ensure that lorry drivers, who play a critical role in keeping our country running, are appreciated and receive the support they deserve. And that's why today we're inviting everyone who has an interest in the issue to come together and develop a long-term solution so we can keep our lorries, and the people who drive them, moving safely.

**Louise Collins**

Director



# Executive summary

**This is the first set of results of a new survey focussing on lorry drivers' experience of using roadside facilities on roads managed by National Highways. We spoke to more than 7000 lorry drivers about their experience of using roadside facilities across 75 sites.**

This report presents the results from year one of the survey and the 75 sites included comprise a third of the total; the remaining sites will be included in the next two waves of the survey.

**Capacity is a major issue**

In our survey, only 37 per cent of drivers were satisfied with the number of available stopping places in the UK. This reflects a similar view from logistics and coach business of which only 22 per cent were satisfied. The situation is at a near critical level according to the Department for Transport's most recent lorry parking survey, which reveals a growing gap between demand and supply. With an average of 21,234 lorries parking each night - nearly 4500 more than the current capacity of managed sites - urgent action is needed to expand and improve rest stop infrastructure.

**Safety remains a key priority**

National Vehicle Crime Intelligence Service (NaVCIS) data reveals that more than 5,000 cargo thefts from trucks occurred in the UK in 2023, with an estimated cost price loss value of £68 million. When factoring in hidden costs – such as vehicle damage, penalties for late deliveries and policing and criminal justice costs – the true impact is estimated to be seven times this, making the figure more likely to be £460 million annually.

Our research shows truck stops largely succeed in providing a secure environment. While some motorway service areas (MSAs) and 'A' road sites also do a good job there are many sites where less than half of drivers rated personal and vehicle security as good. The disparity between high and low scores indicates that improvement is possible; indeed, some MSAs score in the 90s for safety. Underperforming sites can learn from their better-performing counterparts.

**The UK driver shortage also remains a significant challenge**

According to DfT official statistics, the vacancy

## Executive summary

gap is currently 24 per cent for the second quarter of 2024 with driver retirement being one of the top reported reasons for this. This issue is likely to worsen as a significant portion of the workforce approaches retirement. Additionally, women are severely underrepresented in the sector, accounting for just two per cent of all drivers, representing an untapped potential workforce. While women in this survey showed a similar level of overall satisfaction to men, their comments – often about toilet and shower facilities – highlight the need for provision that is better suited to their needs.

### Getting the basics right is key

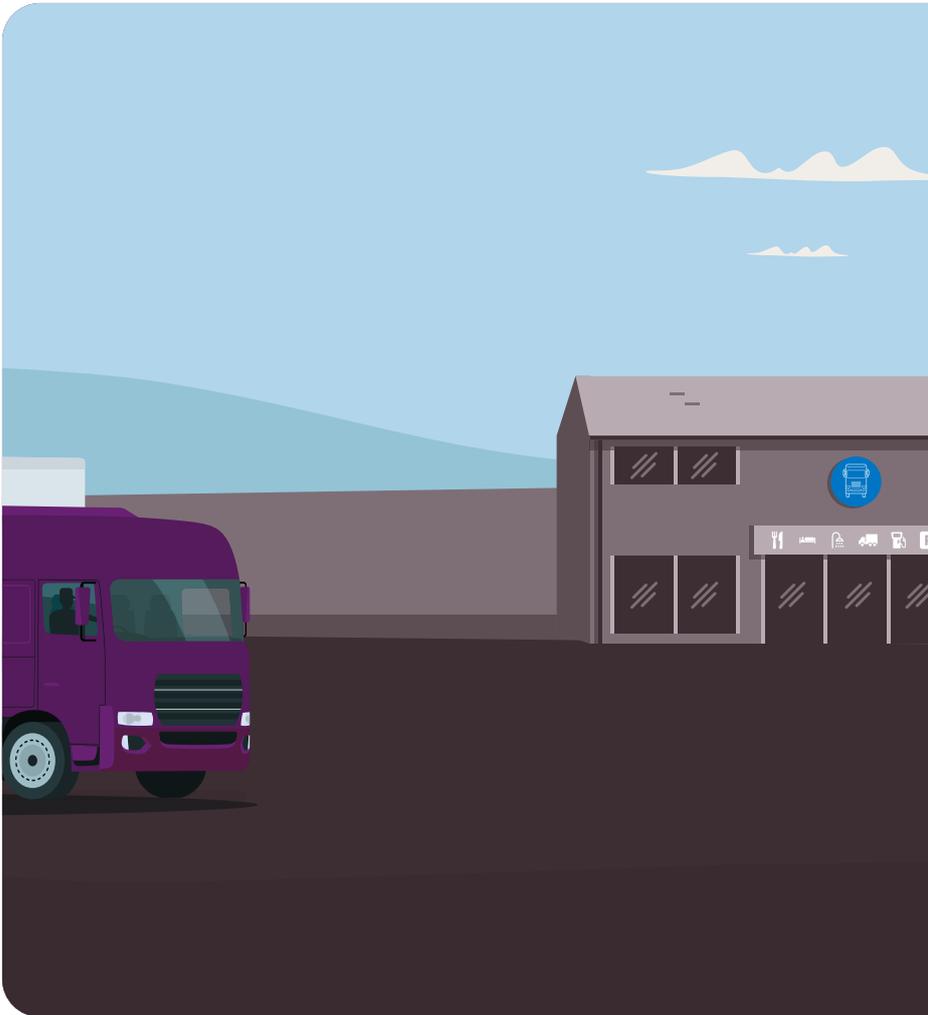
Lorry drivers aren't asking for much, they just want somewhere clean, safe and reasonably priced where they can grab something to eat and rest before continuing with their journey. Ensuring drivers have access to basic facilities and making them feel valued is critical for recruitment as well as retention.

While overall satisfaction with rest stops is relatively high at 86 per cent (although low expectations may play a part in this), further analysis reveals significant

variations between sites and in underlying factors. This is particularly seen in results for security, parking, food and the ability to rest, which we will explore in more detail through the report.

As we continue into the second year of our research, we will continue comparing the experience of drivers across sites and will be exploring some of the issues impacting drivers in more detail.





**What needs  
to change?**

**Lorry drivers need good quality, safe, welcoming rest stops so they can stop and take a break in order to do their jobs safely. There need to be enough rest stops and in the right places so they can stop when and where they need to. Current provision of lorry parking and rest stops across the UK is not meeting these needs. With a shortage of drivers and an aging workforce, retaining and attracting drivers to this vital role is key and rest stops play a part.**

We are calling for government and industry to work together to put a renewed focus on enhancing both the quality and capacity of rest stops across the country to address these issues. This is a complex issue that requires collaboration from a wide range of stakeholders, including government, planning authorities, freight companies, service operators, and more.

In the new year we will bring together representatives from the Department for Transport, National Highways, the Road Haulage Association, Logistics UK, Formula truck stop, Certas Energy, Welcome Break and Extra services, Unite the Union and others. Working together

we will develop a long-term solution so we can keep our lorries, and the people who drive them, moving safely.

## **Parking capacity that meets demand**

Lorry drivers must be able to stop when and where they need, so they can take a break, access essential facilities and comply with driving hours rules. There should be a sustained focus on increasing parking capacity in the right places to ensure that availability meets the growing demand.



## What needs to change?

### **Better and consistent quality of services**

Lorry drivers deserve good quality facilities that cater to their needs whenever they take a break. This includes eating and drinking, using toilets and showers and resting. Work must be done to drive up standards and ensure consistent quality of facilities across sites.

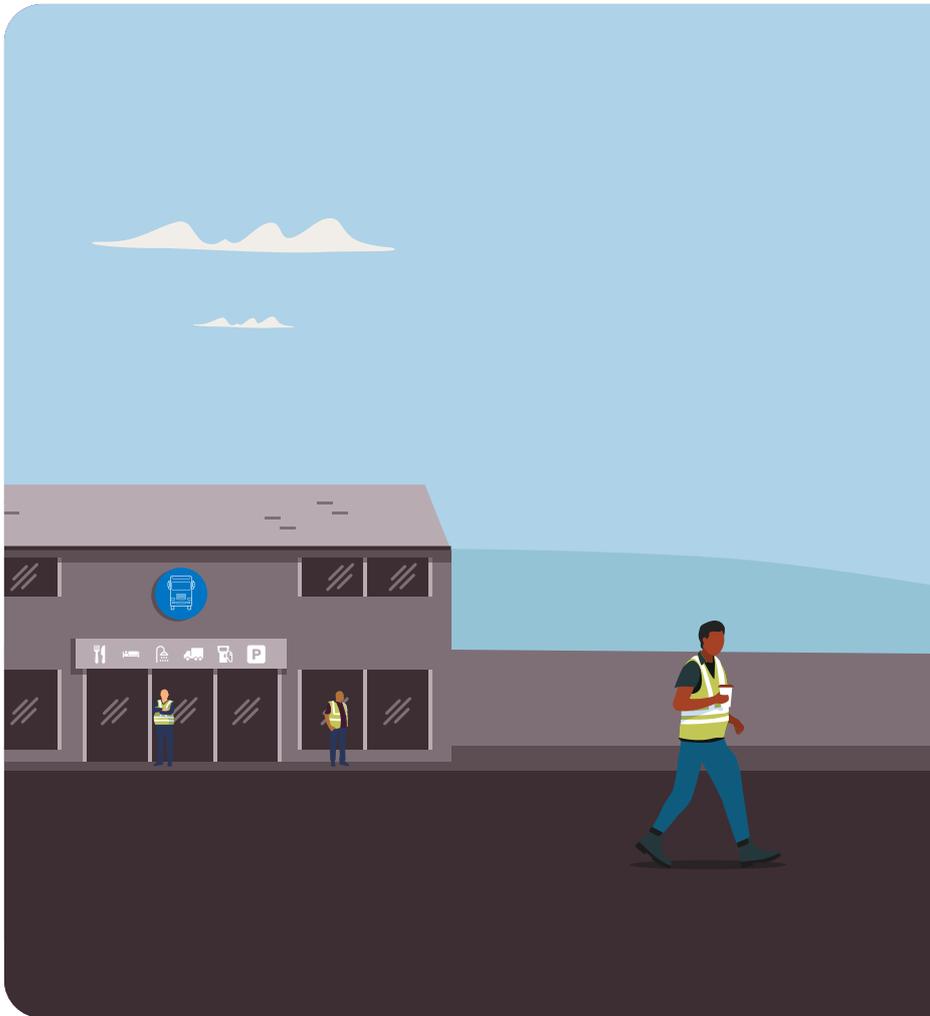
### **Safety and security for drivers and vehicles**

Lorry drivers shouldn't have to worry about their safety or the security of their load when stopping to rest. Security standards must be improved, particularly at sites where perceptions are much lower.

### **A welcoming environment**

Lorry drivers deserve to feel valued and welcome wherever they choose to stop and rest while doing an essential job. The current experience at some services, which leaves lorry drivers feeling less valued than other customers, must be challenged.





# The bigger picture

## Provision in general is not good enough

**When asked about provision of stopping places across the UK, nearly half of drivers tell us they are dissatisfied with the quality and number of suitable places for HGVs to stop.**

There is also some indication that the situation is deteriorating with half of drivers saying facilities had become worse in the last 12 months, although we know drivers may not always confine themselves to this timescale when answering the question.

This perception is particularly notable among those with over 20 years' experience. This could indicate that this

group is reflecting on 'the good old days' of driving a lorry.

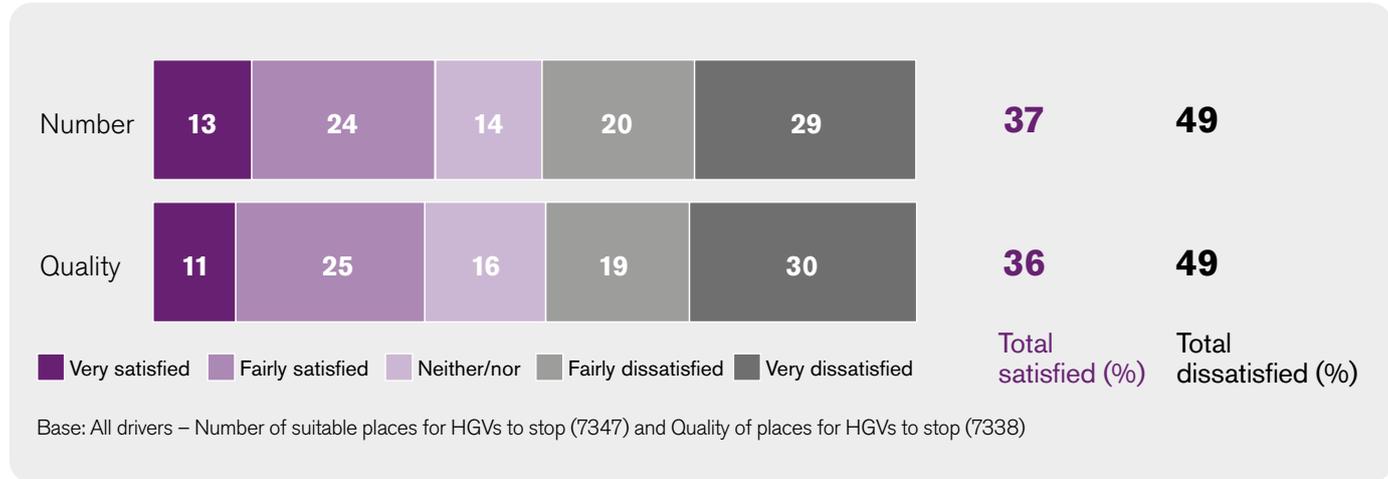
Possible reasons include stricter regulations and less freedom, increased volume of traffic, therefore more competition for space and a decline in appreciation for the profession. It may be that drivers get jaded after a longer time.

Many drivers shared concerns around the number of places that are closing down. This includes services like truck stops but also laybys, leaving them with even fewer options when it comes to parking.

*"More and more truck stops are closing down this is not good for UK truckers, where are we supposed to stop/eat/sleep. Laybys are not a replacement for proper services."*

*"Facilities have steadily got worse as there are more trucks on the road and less safe places to park. It costs a lot of money to stay at the services, and your vehicle isn't safe."*

**Number and quality of places to stop in the UK (%)**



**50%** of drivers think facilities have got worse in the last 12 months

*“There are just not enough places for wagons to park up and facilities are hit and miss throughout the country so the standards need to be improved.”*



# Future needs

**Why does it matter what drivers think of overall service provision? Primarily because HGV drivers fulfil an important role in the UK economy, and they deserve to have good working conditions. But also because there is a shortage of HGV drivers, and the workforce is aging, which will only compound this as older drivers retire. The industry needs to encourage new people to join the workforce to help fill this gap and retain them once they have joined.**

Drivers who have been in the profession longer tend to be less satisfied with specific visits as well as overall provision. This may partly stem from higher expectations as they compare current conditions to how facilities once were, given their strong view that that facilities have become worse over time.

*"Bin for sanitary products in shower important."*

## Women drivers

Women are heavily underrepresented within the industry, making up around two per cent of the HGV driver workforce according to the 2021 census, having doubled since the previous year. Women made up three per cent per cent of our survey participants, which may be an indication that the number is increasing, however it may be that women drivers are more likely to stop at the types of sites we surveyed or are more likely to participate in surveys. We also found that a larger proportion of the women we surveyed were newer to the profession. 40 per cent of women had less than five years' experience, compared to 16 per cent of men, another sign that increasing numbers of women are becoming lorry drivers.



**40%** of women drivers have less than five years' experience

Base: Male lorry drivers (7155); female lorry drivers (224)

## Future needs

It is encouraging to find that there was no significant difference in overall satisfaction between the women and men we surveyed; 83 per cent were satisfied compared to 86 per cent of men. However, women drivers may be selecting particular sites they know offer certain facilities and therefore rating them relatively highly. Comments indicate that women do have some additional needs that warrant further consideration – in particular easily accessible separate toilets and showers.

It is reassuring to see through the comments that a number of male drivers also want to see better facilities for women.

Women were also more likely to have dietary requirements, 18 per cent compared with six per cent of men. We found that drivers who have dietary requirements are less likely to be satisfied with their stop overall, and less likely to rate all aspects of food and drink good than those without. The industry needs to consider the changing needs of drivers as well as any current barriers to the profession.

*“Not enough showers and none for women.”*

*“The showers have been improved as an extra one was needed and supplied but a shower especially for females should be here too.”*

*“As a female I often rarely come across toilet facilities unless at a services.”*



**How are sites doing overall?**

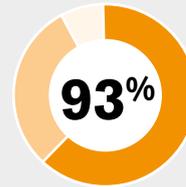
Overall satisfaction is high, with 86 per cent of drivers saying they were very or fairly satisfied with their visit that day. Scores vary significantly between site type, with truck stops scoring highest at 93 per cent.



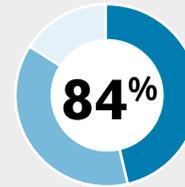
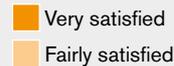
**86 per cent of drivers were satisfied with their visit on the day**



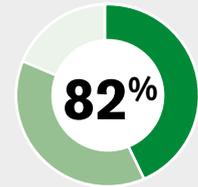
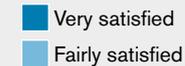
## Overall satisfaction



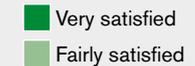
Truck stop



'A' road



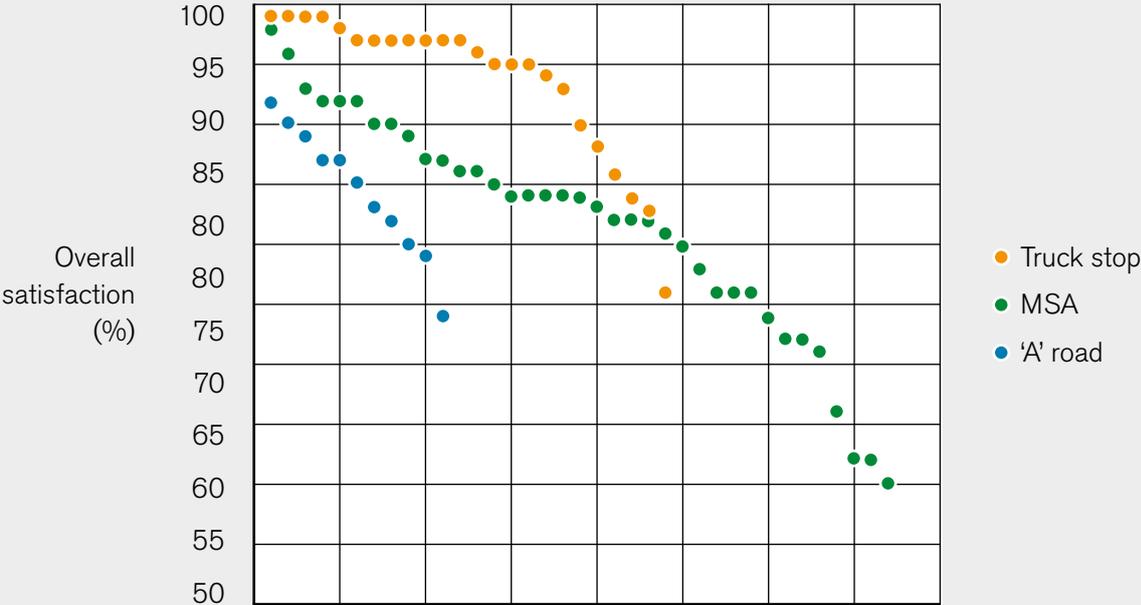
MSA



Base: All drivers (Truck stop 2538, 'A' road 1112, MSA 3747).

Once we look at the individual site scores, we see even more variation, and while satisfaction looks pretty good at an overall level, there are a number of sites with room for improvement.

Distribution of individual site scores by site type



Base: All drivers (7265). Excludes sites which had less than 100 interviews). Each dot represents the score of an individual site.

## Overall satisfaction by site (%)

Rank	Site	All satisfied	Site type
1	Formula Services	99	Truck stop
2	Skelmersdale Truck Stop	99	Truck stop
3	Sutterton Truckstop	99	Truck stop
4	Junction 23 Lorry Park	99	Truck stop
5	Exelby Services A19 North	98	Truck stop
6	Roadchef Strensham South	98	MSA
7	Hill Top Cafe	97	Truck stop
8	Dover Truckstop	97	Truck stop
9	Ashford International	97	Truck stop
10	Risbys	97	Truck stop
11	Glen Transport Services	97	Truck stop
12	Chirk Truck Stop	97	Truck stop
13	Red Lion Café and Truckstop	97	Truck stop
14	Stop24 Services Folkestone	96	MSA
15	Welford Truck Stop	96	Truck stop
16	Fox Inn	95	Truck stop
17	Lincoln Farm Truckstop	95	Truck stop
18	Stibbington Diner	95	Truck stop
19	Barney's Transport Café	94	Truck stop
20	Riverside Transport Café	93	Truck stop
21	Roadchef Stafford South	93	MSA
22	Redbeck Motel	92	'A' road
23	Moto Reading West	92	MSA
24	Welcome Break Warwick South	92	MSA
25	Welcome Break South Mimms	92	MSA

Rank	Site	All satisfied	Site type
26	Cartland Truck Stop	90	Truck stop
27	Roadchef Tibshelf South	90	MSA
28	Shell Thurstaston	90	'A' road
29	Welcome Break Corley West	90	MSA
30	Moto Wetherby	89	MSA
31	Purdy Lodge	89	'A' road
32	Immingham Lorry Park	88	'A' road
33	Roadchef Chester	87	MSA
34	Moto Winchester South	87	MSA
35	Moto Lymm	87	'A' road
35	Four Went Ways Services	87	'A' road
37	Scunthorpe Truck Stop	86	Truck stop
38	Welcome Break Hopwood Park	86	MSA
39	Roadchef Maidstone	86	MSA
40	EG Rivington South	85	MSA
41	Cartgate Lodge picnic area	85	'A' road
42	Stainmore Cafe	84	Truck stop
43	Roadchef Durham	84	MSA
44	Welcome Break Gordano	84	MSA
45	Welcome Break Birchanger Green	84	MSA
46	Welcome Break Michaelwood North	84	MSA
47	Welcome Break London Gateway	84	MSA
48	Exelby Services Whitwood	83	Truck stop
49	Moto Cherwell Valley	83	MSA
50	Moto Grantham North	83	'A' road

Base size per individual site ranges from 97-110

## How are sites doing overall?

Rank	Site	All satisfied	Site type
51	Moto Hilton Park South	82	MSA
51	Extra Cambridge	82	'A' road
53	Moto Leigh Delamere East	82	MSA
54	Roadchef Sandbach South	82	MSA
55	Roadchef Northampton South	81	MSA
56	Moto Leeming Bar	80	'A' road
57	Extra Beaconsfield	80	MSA
58	Roadchef Sutton Scotney North	79	'A' road
59	Moto Bridgwater	78	MSA
60	Welcome Break Hartshead Moor East	76	MSA
61	Extra Cobham	76	MSA
62	J W Cousins & Sons	76	Truck stop
63	Moto Trowell North	76	MSA
64	Brampton Hut Services	74	'A' road
65	Moto Frankley South	74	MSA
66	Welcome Break Sedgemoor North	72	MSA
67	Welcome Break Burtonwood	72	MSA
68	Moto Chieveley	71	MSA
69	Moto Birch East	66	MSA
70	Moto Lancaster South	62	MSA
71	Moto Severn View	62	MSA
72	Moto Woolley Edge North	60	MSA

**Drivers tend to be more satisfied at bigger sites, which is likely down to larger sites typically having more to offer. However, smaller sites can perform well. Exelby Services on the A19 is impressive, being a site with fewer than 50 spaces that has managed to gain an overall satisfaction score of 98 per cent. Similarly, despite having fewer than 25 spaces, Four Went Ways is in the top half of sites sampled with an overall satisfaction of 87 per cent.**

Satisfaction is also higher amongst drivers who felt they had a choice of where to stop. This isn't surprising, but we need to acknowledge that most drivers don't have the luxury of choice given stopping is largely driven by driving hours rules. The need to stop is critical for safety and well-being and only highlights the need for a positive experience across all stops.

## Why is satisfaction high when quality is generally perceived to be poor?

**The high overall satisfaction rate of 86 per cent presents a stark contrast to general perceptions where only 36 per cent were satisfied with the quality of sites.**

To explore this, part way through the survey period we started to ask drivers who were satisfied with their visit but dissatisfied with the overall quality of sites which types of locations they had in mind. In total 800 drivers were sampled. The majority cited MSAs (65 per cent), along with laybys (46 per cent) and 'A' road services (44 per cent) followed by truck stops (33 per cent) and industrial parks (27 per cent).

It is not clear exactly why there is such a large disparity between satisfaction at a particular site and provision as a whole. One possibility is low expectations; it may be that drivers are exercising some level of choice and going to the stops they prefer; or it may just be that drivers are using prior knowledge of sites to avoid the worse elements – choosing not to use the showers, for example, or bringing their own food. Comments from

drivers indicate that some still rate their experience as 'very satisfied' despite having criticisms, suggesting that the bar for satisfaction ratings may be relatively low.

*"This site is of a really good standard and drivers can relax here and eat good food. Other sites are not like this, with poor parking areas, toilets and showers are not looked after. Caravans take up space in the lorry park which shouldn't be allowed. They don't have a separate area for drivers to relax."*

*"Some are decent but others are poor for food choice and cleanliness so there should be a level that we can rely on."*

How are sites doing overall?





**What makes  
a good or  
poor site?**

**Sites need to get the basics right to ensure drivers have a more positive experience. Drivers were more likely to be satisfied if they rated basics such as toilet cleanliness, security and food value for money as good.**

When we look at which aspects of the experience have the greatest influence on whether drivers are satisfied, the one factor above all that drives satisfaction regardless of length of stay or type of site is how welcoming the site was.



What makes a good or poor site?





**What makes  
a good or  
poor site  
- in detail**

## Safety and security

There is a sense among drivers that the profession is becoming increasingly unsafe, with insufficient action to address the rise in crime. This has left many feeling angry and frustrated. Ensuring drivers feel safe is essential for their welfare, but the theft of fuel and goods has large cost implications beyond this. Lorry drivers need to be able to rest without fearing for their safety or that of their vehicle and load.

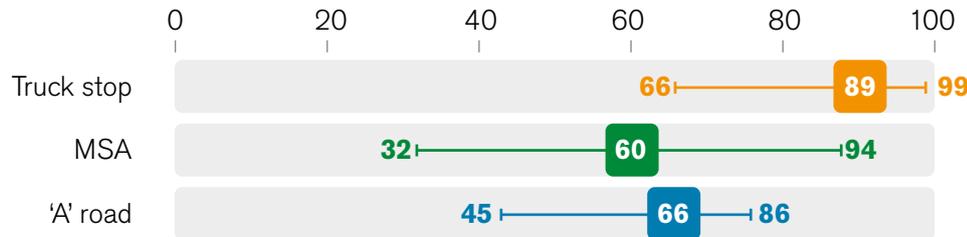
Truck stops are perceived to be doing a much better job at providing safe and secure parking than 'A' road

services and MSAs, with less than half of drivers rating vehicle security as good at eight of the MSAs sampled.

Improvements to things such as CCTV and security patrols can make a difference here, but this issue will also require collaboration across the industry to address, particularly at sites which are being targeted by organised crime.



### Vehicle security, including the load (% 'good')



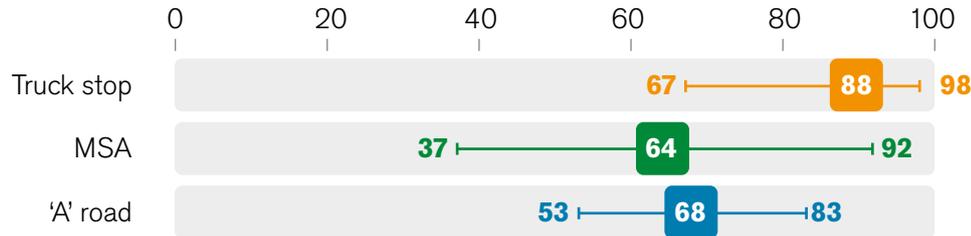
Base: Truck stops (2409); MSAs (3480); 'A' road (980)

Range of individual site scores by site types overlaid with overall satisfaction score for each site type.

## What makes a good or poor site - in detail



### Personal security (% 'good')



Range of individual site scores by site types overlaid with overall satisfaction score for each site type.

Base: Truck stops (2397); MSAs (3473); 'A' road (977)

*"We need more safe and secure parking. There is a massive shortage of available parking and certainly secure parking. Load and fuel thefts are at an all-time high and nothing seems to be getting done about it."*

*"Better safety for lorry drivers and female drivers in particular."*

## The importance of rest

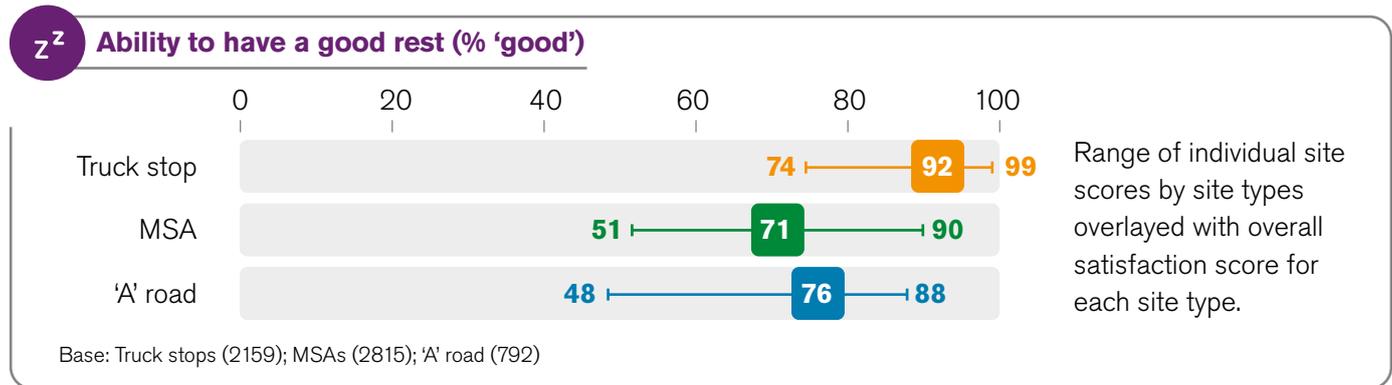
**Roadside facilities play a crucial role in ensuring drivers are well rested, no matter the length of stop, so drivers can continue their journey driving safely.**

Driving a HGV is a safety-critical job, and it's vital that drivers are not stressed or fatigued while on the road. Strict regulations around working hours and rest breaks exist for this very reason.

This is especially important for overnight stays, where

poor sleep not only has implications for safety but also health and well-being. Many complained about the noise from refrigerated vehicles and the need for a quiet area to help them sleep.

It is therefore concerning that many MSAs and 'A' road services are not enabling drivers to properly relax and recharge. All but three truck stops exceeded 85 per cent for ability to have a good rest, while only one MSA and three 'A' road sites exceeded that figure.





## What makes a good or poor site - in detail

*"I drive about 4000 miles per week. I'm shattered when I get to truck stops and want a nice shower, healthy food and good sleep. Some truck stops offer only unhealthy food and the showers and toilets are dirty so it's just making my life so upsetting and stressful and I end up not getting any sleep and I feel terrible."*

*"Would rather have designated sections for fridge trucks to be kept separated from other freight for the sake of a good rest overall for all drivers."*

## Toilets and showers

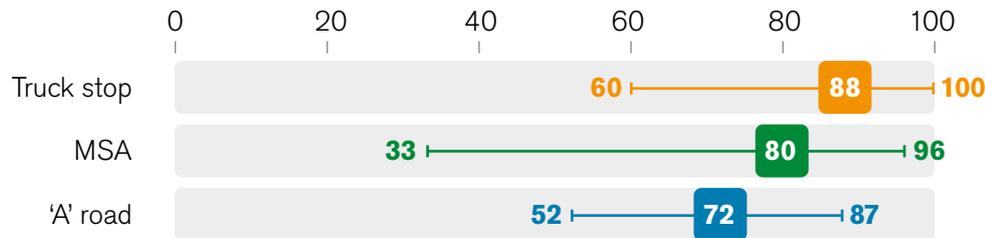
Toilets are by some distance the most widely used part of any facility. 71 per cent of drivers used the toilets during their visit. However, comments indicate that not all drivers are using the facilities to go to the toilet when they want to, which may be due to the lack of convenient toilets near the lorry parking area. Drivers are often short of time, and the HGV parking is often further away from the main building. Usage might be higher if these issues, along with better availability, were resolved.

Among those using the toilets on their visit, just over

eight out of 10 rated them either very or fairly good on availability and cleanliness. However, the range in scores at site level shows that this experience is not the same everywhere, with both Formula Services and Skelmersdale Truck Stop scoring 100 per cent for the number of available toilets while Moto Severn View (the lowest rated) scored 33 per cent. Similarly, truck stops outperformed both MSAs and 'A' road services for toilet cleanliness with an overall score of 87 per cent, compared to 80 per cent for the other site types.



### Number of available toilets (% 'good')



Base: Truck stops (1775); MSAs (2735); 'A' road (727)

Range of individual site scores by site types overlaid with overall satisfaction score for each site type.

## What makes a good or poor site - in detail

*“Toilets either end of truck parking. Even if its portable toilets. I don't want to get up at 3am on a freezing wet windy night and walk 500 yards plus for a wee.”*



Showers were almost as widely used as toilets – but only by those staying overnight – 63 per cent of drivers. Again, better availability at MSAs and 'A' road sites may increase use, and it may be that some drivers are not even attempting to use them based on existing expectations. There were lots of comments from drivers asking for both more and cleaner shower facilities. Sometimes little things can make a difference, with drivers asking for hooks to hang clothes and places to put toiletries.

*“Still too many sites without shower facilities and still have sites with showers that are dirty.”*

*“The general smell of urine in the coach parking area is getting worse.”*

## Food and drink

Purchasing food and drink was the second most common thing lorry drivers do when stopping after using the toilet facilities.

But despite the importance of this aspect of service, ratings are comparatively low. Once again, truck stops score significantly higher than MSAs for all aspects of food and drink service: speed of service, choice, quality and value for money. Value for money is rated particularly poorly at MSAs, with less than half of drivers (49 per cent) rating it as good compared to 89 per cent at truck stops. There are many sites that offer a meal voucher at a discounted rate



for drivers also paying for parking, but this isn't available everywhere and only for those who are stopping for longer.

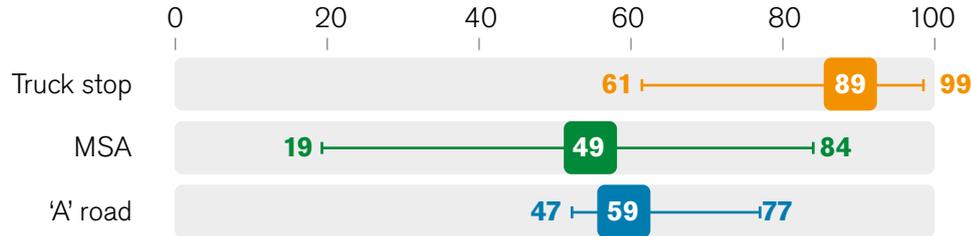
Lorry drivers tell us they feel that food and drink is too expensive at MSAs and 'A' road services, which is reflected in the poor ratings of value for money. Infrequent users of services are more likely to accept paying a bit more as a 'one off' than they might elsewhere, but for lorry drivers out on the road all day with little choice about where to purchase the perceived 'services premium' mounts up. Many want to see healthier options than the fast-food outlets MSAs typically offer.

*"I'm vegan and there is no healthier food here, just fatty fast food rubbish. If I was to live off the food in these services it would take 30 years off my life and I'd be really unhealthy. Coffee shops don't stay open all night for when night driving."*

## What makes a good or poor site - in detail



### Value for money of food and drink (% 'good')

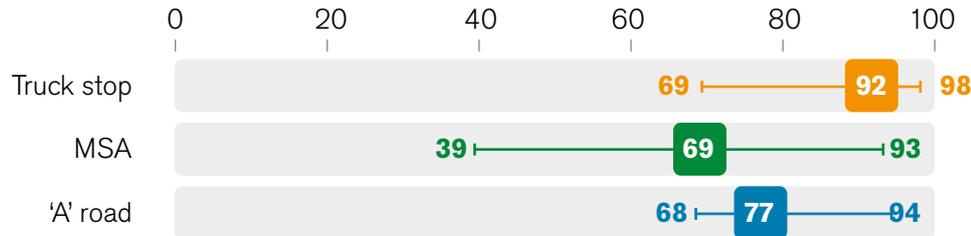


Range of individual site scores by site types overlaid with overall satisfaction score for each site type.

Base: Truck stops (1649); MSAs (2415); 'A' road (733)



### Quality of food and drink (% 'good')



Range of individual site scores by site types overlaid with overall satisfaction score for each site type.

Base: Truck stops (1636); MSAs (2413); 'A' road (734)

## Parking

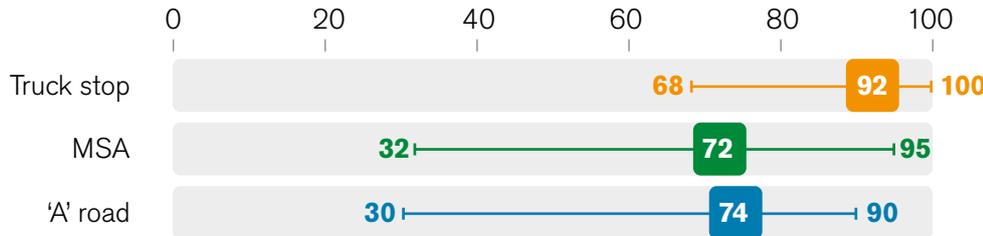
Lorry drivers must stop regularly in line with strict driving hours rules and if there isn't a space at services, then they will have to stop somewhere else, like a layby where there are no facilities or security. Nearly half of drivers told us they were dissatisfied with the number of suitable places for HGVs to stop in the UK and their comments highlight these wider issues.

When asked to rate parking availability at the sites they visited, it's important to recognise that this feedback comes from those who had already secured a space.

*"More sites need to be available and big enough to cope with the volume of trucks."*

*"Improve HGV access to parking bays. Very tight when cars are parked in bays opposite."*

### **P** Availability of parking spaces (% 'good')



Range of individual site scores by site types overlaid with overall satisfaction score for each site type.

Base: Truck stops (2520); MSAs (3735); 'A' road (1098)

## What makes a good or poor site - in detail

Despite this, just under three-quarters of those at MSAs and 'A' road sites rated the availability as good.

Most drivers found paying for parking easy, with many sites offering payment via SNAP, which allows employers to pay for parking directly. The comments suggest drivers tend to prefer this as it makes the payment process simple, eliminating the need for them to pay upfront and reclaim the expenses.

Drivers were also asked about the surface quality of the parking area. This is clearly an issue requiring widespread improvement, with scores at individual sites as low as 14 per cent. Overall, truck stops are still doing better (71 per cent) compared with MSAs (63 per cent) and 'A' road services (58 per cent).

Many complaints centred around potholes, while other issues include where the parking area is in relation to facilities and the layout of the parking area.

Drivers making short stops are often pressed for time, and therefore the distance from facilities eats into their break. This also causes problems for those needing

to use the toilet overnight, leading some to avoid the facilities altogether.

When it comes to how well the parking is managed, MSAs (52 per cent) and 'A' road sites (56 per cent), perform poorly compared with truck stops (84 per cent).

*“Parking for lorry drivers is generally terrible, and you really need to be parked by 6pm if you have any hope of finding a space. The quality of facilities varies such a lot.”*

## Feeling welcome

The one factor above all that drives satisfaction regardless of length of stay or site type is how welcoming the site is. Unfortunately, many lorry drivers report feeling unwelcome and poorly treated, particularly at sites they don't feel cater for them.

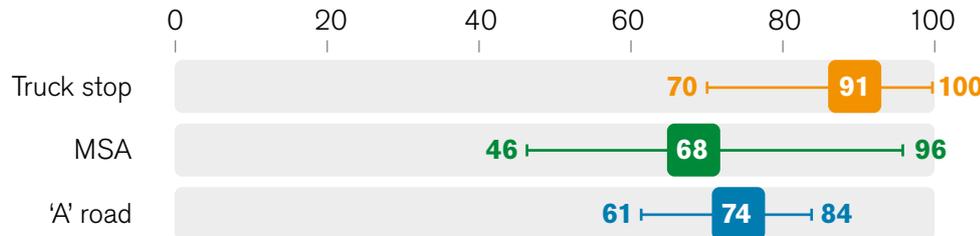
Truck stops are doing well at this, with all but one site scoring above 80 per cent for making drivers feel welcome. MSAs and 'A' road services, on the other hand, have some work to do with scores of 68 per cent and 74 per cent respectively. Unlike truck stops, we know these

types of sites have the challenge of catering to other types of road users, but individual site scores show that some sites are doing much better than others, indicating that it *can* be done.

*"Treat us a bit better, we're just like everyone else."*



### How welcoming the site is to lorry drivers (% 'good')



Range of individual site scores by site types overlaid with overall satisfaction score for each site type.

Base: Truck stops (2510); MSAs (3711); 'A' road (1101)

## What makes a good or poor site - in detail

### What makes a site welcoming?

As well as providing amenities that meet their needs, a site that is well maintained and managed helps make lorry drivers feel valued and, therefore, welcome. But over and above this, it's the staff that can make all the difference to whether a driver feels welcome – and here, truck stops outshine MSAs and 'A' road services too. Over a quarter of drivers (27 per cent) said that they chose a particular truck stop because 'the staff are great', higher than the 10 per cent at 'A' road services and eight per cent at MSAs.

*"A lot of sites don't care about lorry drivers. Always put us farthest away. Cars, caravans etc get treated better."*





**What do  
lorry drivers  
want  
improving?**

## What do lorry drivers want improving?

**Across all sites – the need for more parking was the top suggested improvement.**

### Key areas to improve:



Parking availability, management and surface quality



Security for HGV vehicles and their load



Better choice and value of food/drink options



The availability and cleanliness of toilet and shower facilities



Site access, including signage

# About this 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 Driver Facilities Survey runs as a three-year programme where we visit a representative third of qualifying sites each year.

Fieldwork runs between September and January 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. 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 21 September 2023 and 1 February 2024.

The number of interviews at each site ranged from 97 to 110 except for three truck stops falling below 50 due to low footfall. The responses received at these sites are included in the overall figures for site type, but not for site level reporting.

For further information on how we carried out this survey, please see the agency technical report.

Throughout this report we make comparisons by the type of site and look at how individual sites perform within these categories. This is because the site types





vary considerably in business model. Motorway services consistently receive lower scores throughout – but this may be in part because they are set up to serve a wide range of customers with widely differing needs.

The same goes for 'A' road services, of which there is less consistency in provision and they tend to be much smaller in size. In comparison, at truck stops, drivers typically don't have to compete with cars, commuters, families, caravans and all sorts of other road users with different needs. Truck stops operators are more likely to understand what drivers want and also more likely to welcome them as their primary source of business.

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.

## Contact Transport Focus

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Design by WillBaxter.com

## Transport Focus

### The voice of Britain's transport users

We listen to the public and find out their experience of using, or trying to use, Britain's railways and England's buses, coaches, trams and motorways and major 'A' roads.

We protect the interests and champion the needs of all transport users today and ensure they're at the centre of tomorrow's policy decisions and future investment.