MEETING THE WELFARE AND PARKING NEEDS OF GOODS VEHICLE DRIVERS AND RIDERS

Briefing Report Slideset

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Meeting the parking & welfare needs of goods & service vehicle drivers & riders (1)

Type of goods and servicing work:
• Long distance goods collection/delivery (driver away from home overnight)
• Shorter distance goods collection/delivery
• Online shopping / meal delivery
• Servicing activities (may involve carriage of goods & tools, but providing service is primary purpose)

Welfare needs:
• **Overnight parking** for long-distance drivers
• **Daytime parking** for rest breaks
• **Rest areas** for workers waiting for next job allocation
• Access to **toilets & handwashing facilities**
• Access to **showers**
• Access to **food & drink facilities**
• **Secure parking facilities** (to protect driver, vehicle & cargo)

Type of vehicles used:
• HGVs
• LGVs
• Bicycles
• Cargo bikes
• Mopeds
• Motorbikes
• Cars
• On-foot porters
Meeting the welfare needs of goods & service vehicle drivers & riders (2)

Long-distance goods vehicle driver

- Overnight rest break parking
- Security facilities (e.g. fencing, CCTV)
- Showers

Short-distance goods vehicle driver

- Mandatory daytime rest break parking
- Toilets & hand wash facilities
- Eating & drinking facilities
- Voluntary daytime rest break location / parking
- Waiting location / parking between job allocations

Riders (of bicycles, cargo bikes, mopeds and motorbikes) and on-foot personnel

- Secure vehicle parking facilities when accessing food & drink
HGV drivers at warehouses, distribution centres & other sites they visit – use of toilets & handwashing facilities

- HGV driver is a **visitor** to the site when making the collection or delivery (rather than employee)
- Driver may need to use toilet/handwashing facilities while making these collections and deliveries:
  - Operators of some sites visited are reluctant to make toilet and washing facilities available (**despite it being a legal requirement since 1992**)
  - Evidence also of poor toilet facilities in some cases when made available to visiting drivers
- A survey of 1,700 HGV drivers → **76% of respondents** reported that in the last year they had experienced a situation when they needed to urgently use a toilet but none were available (Unite the Union, 2022)
- These driver welfare problems became even more common during Covid-19 pandemic
- Under-Secretary of State for Transport and the CEO of HSE provided letter they had signed in 2020 that could be presented to sites visited by HGV drivers telling the site operator that preventing access to toilets was illegal
- Monitoring and enforcement of HGV driver access provision to toilets at sites they visit is very weak
HGV drivers at warehouses, distribution centres & other sites they visit – parking space for mandatory rest breaks

• Driver may need to take a **legally required rest break** while making collections and deliveries

• Operators of some sites visited are reluctant to provide parking space for rest breaks, or even if such space exists, refuse to make it available to visiting HGV drivers

• Witnesses in Transport Select Committee inquiries into road freight in 2015/16 and 2021/22 provided evidence of these commonplace instances

• Despite multiple recommendations (Transport Select Committee, 2016, Logistics UK, 2017, CILT, 2017, National Infrastructure Commission, 2019) that secure parking should be a planning requirement for commercial developments over a certain size, this idea was not taken up by UK Government
Driver/rider welfare needs and facilities for other workers making deliveries/collection and providing services

• Far less consideration has been given to needs of those delivering and collecting goods using **vans, cargo bikes, bicycles, mopeds, motorbikes and on-foot parcel and document couriers**. This also includes service personnel, such as engineers, plumbers, and builders.
  • Many of these workers are providing last-mile services linked to the growth in online shopping and meal delivery, sometimes without employed status making their needs even more invisible than HGV drivers.

• **Toilet and washing** facilities often less readily available than for HGV drivers→ workers mostly visit offices, shops, and residential homes, rather than distribution centres and warehouses

• **Reduction in the provision of public toilets** in towns and cities adds to the problem

• Some delivery personnel have to **wait between deliveries** for next job allocation (e.g. same-day parcel and document couriers, meal delivery personnel)
  • **Little provision of waiting areas** – often leads to waiting in outdoor public places → biggest problem for those without enclosed vehicles in terms of exposure to weather (e.g. rain, wind and sun) and risk of crime / theft
  • Some of this waiting between jobs takes place in the dark adding to risk

• **Theft of / vandalism to vehicles** (especially bicycles, mopeds, cargo cycles) while accessing food and drink in shops & cafes is also major risk – require safe public storage and parking locations for them

• **Public and private sectors need to work together** to discuss the provision of these basic facilities for workers
Long-term developments in road freight transport – growing need for overnight HGV parking stops

- Increase in HGV carrying capacity (weight & volume)
- Increase in vehicle maximum speeds (reflecting developments in vehicle engineering & new motorway network)
- Has led to:
  - faster journeys transporting more goods which reduced unit costs
  - modal shift from rail to road
  - increase in average distance over which goods transported by road
  - growth in long-distance journeys requiring overnight stops
Vast majority of all tonne-kilometres by HGV performed by articulated vehicles in 2021/22 (79%)
Articulated HGVs involved in far greater proportion of long distance journeys than rigid HGVs
Articulated HGV drivers therefore have far greater need for overnight parking facilities
Vehicle parking for breaks and rest break requirements

Where HGVs may be parked for breaks (overnight & daytime)
- On-street at kerbside or in lay-by
  - Legal unless restrictions in place
  - Have to leave side & rear lights when dark if over 7.5 tonnes
  - Many restrictions in place for HGVs over 7.5 tonnes
  - Commonly used on-street locations include laybys and kerbsides in industrial estates
  - Authorities often keen to prevent such overnight stops due to safety, amenity and traffic impacts
- Lorry parks (also known as truckstops) – off-road facilities provided by private operator or local authority
- Warehouse / distribution centre visited to make collection/delivery – if permitted to do so by operator
- At other transport operators’ premises as part of a collaborative network or publicly available scheme (e.g. SNAP)

Driver rest break requirements
- HGVs
  - at least 11 hours rest every day
  - unbroken rest period of 45 hours every week
  - break or breaks totalling at least 45 minutes after no more than 4 hours 30 minutes driving
  - weekly rest after 6 consecutive 24-hour periods of working
  - Break may be taken in a HGV, provided no other work is undertaken
- LGVs
  - daily driving limit of 10 hours
Developments in HGV driver facilities, on-street HGV parking restrictions in UK, 1920s-1970s

1920s on - emergence of transport cafes & hostels serving road HGV drivers in urban & non-urban locations. Some began to close from late 1950s, while others converted into Little Chefs & Happy Eaters catering to families rather than HGV drivers. Few cafes serving HGV drivers now left

1950s on - lorry parks on A-roads and other roads in urban and non-urban locations – mostly run by private businesses

1959 - first Motorway Service Area with HGV facilities

1969 – Powers for local authorities to place restrictions on HGV kerbside parking on amenity grounds

1971 - UK government scheme to buy sites for national network of 50-60 large secure lorry parks in England & for local authorities to provide smaller lorry parks

1974 - UK government reverses decision to finance and develop national network. Instead, says that lorry parks are responsibility of local authorities

Source: UoW
Developments in HGV lorry parks and driver welfare facilities in UK, 2000-2023

2023 - Will lack of lorry park space and overnight use of layby and kerbsides in industrial estates continue or will Government action plan in 2022 be sufficient? Will Industry Levy be necessary? Will action be taken on HGV parking space for daytime rest breaks and wider freight worker welfare issues? And, if so, by whom?

2022 – UK Government sets out plan for lorry parks in response to Transport Select Committee including planning reforms, minimum standards for industry, £20 million investment for improved facilities on SRN, £32.5 million matched funding for industry for lorry park improvements, and possible industry Levy to pay for lorry park facilities

2021 – Transport Select Committee inquiry into the freight supply chain including overnight lorry parking facilities and driver welfare issues

2015/16 – Transport Select Committee inquiry into the road haulage industry including overnight lorry parking facilities

2009 – UK Government lorry parking strategy to clarify roles & responsibilities for lorry parks across public & private sectors – cancelled in 2010 with change of Government – responsibility on private sector & local authorities to provide lorry parks reemphasised

2006 - first data providing evidence of shortage of lorry park spaces in 2006. Problem has been found to have increased in each subsequent survey (shortage of 7000 HGV spaces in 2022)

Source: UoW
Government and industry action on driver welfare issues in recent years

• **Relatively little government-led or industry-led work** into parking and welfare needs of those delivering and collecting goods and providing services using vehicles in recent decades

• Where there has been any action, it has **mostly only considered overnight HGV parking** (with little action to date even in relation to this issue)

• **DfT revised circular issued in Dec 2022** - contains relatively minor changes to minimum facilities for lorry parks & statements about National Highways & local authority responsibility for addressing overnight parking space shortages with little explanation about how this will be achieved)

• Very little attention given by government or industry to:
  - HGV parking space and facilities for daytime rest breaks
  - Wider driver welfare and rest facilities for all those delivering & collecting goods and providing services (especially in urban areas)
Government-commissioned audit of overnight HGV parking in England – purpose & methodology

• Audits of overnight lorry parking on & close to Strategic Road Network (SRN) in England commissioned by National Highways in 2006 and Department for Transport in 2011, 2017 and 2022 to better understand overnight lorry parking situation

• Carried out by transport consultancy AECOM

• All audits use same methodology - surveying HGV parking both on & up to 5 kms from SRN in England

• In most recent (2022) audit, survey work carried out between 18:00 and 02:00 on Tuesdays, Wednesday and Thursdays throughout March 2022 (previous audits also carried out in March to aid comparison)

• Department for Transport has also commissioned work to better understand how levels of HGV parking “fluctuate throughout the year and if there are regional differences in seasonal fluctuations” (AECOM, 2022)
## Types of lorry park

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Independent truckstop**           | Sites providing daytime and overnight lorry parking facilities that are usually independently owned and operated (or may be part of a specialist chain of sites). They are available to any freight driver (irrespective of company) and are typically exclusively for the use of freight vehicles but some may provide daytime rest and refreshment facilities for passenger traffic (car and coach).  
(Also includes cafes with parking for lorries – which may not have any facilities opened at night). |
| **Local authority truckstop**       | Sites providing daytime and overnight lorry parking facilities that are under the control of a local authority. Typically basic toilet block amenities are provided and often an independently run café is co-located on the site.  
Sometimes a car park that is used for lorry parking at night, typically without any facilities. |
| **Motorway services area (MSA)**    | Sites signed off the Motorway network providing daytime and overnight lorry parking facilities, typically but not exclusively operated by road-side facility chains. Separate lorry parking areas are provided but welfare facilities are common to all MSA traffic. |
| **Trunk road services area (TRA)**  | Sites along the strategic road network (SRN) providing daytime and overnight lorry parking facilities. Separate HGV parking areas are provided but welfare facilities are common to all service area users. Whilst some sites are large, many are small with limited lorry parking and facilities limited to the forecourt shop and toilets. |

Source: AECOM, 2022
Lorry Park Road Signage

Source: https://commons.wikimedia.org/wiki/File:UK_traffic_sign_2510.svg
Examples of lorry parks at Motorway Service Areas (1)

Lorry park at Hilton Park Services on the M6
(Trunk Road Services Area)

Lorry park at Warwick Services on the M40
(Independent Lorry Park)

Source: Steve Daniels, 2009,
https://commons.wikimedia.org/wiki/File:The_lorry_park_at_Hilton_Park_s
ervices_-_geograph.org.uk_-_1576256.jpg

Source: David Dixon, 2012
https://commons.wikimedia.org/wiki/File:Lorry_Park,_Warwick_Services_-_geograph.org.uk_-_3267595.jpg
Examples of lorry parks at Motorway Service Areas (2)

Lorry park at South Mimms Services on the A1M

Source: Antony, Dixon, 2011
https://commons.wikimedia.org/wiki/File:Lorry_park_at_South_Mimms_Services_-_geograph.org.uk_-_2698750.jpg

Lorry park at Chieveley Services on the M4

Source: Graham Horn, 2008
https://commons.wikimedia.org/wiki/File:Lorry_park_at_Chieveley_services_-_geograph.org.uk_-_927969.jpg
Examples of lorry parks at Motorway Service Areas (3)

Lorry park at Clacket Lane Services on the M25

Source: Mike Faherty, 2009
https://commons.wikimedia.org/wiki/File:Clacket_Lane_Services__lorries__geograph.org.uk__1398796.jpg

Lorry park at Sandbach Services on the M6

Source: David Dixon, 2014
https://commons.wikimedia.org/wiki/File:Lorry_Park_at_Sandbach_Services__(M6_Southbound)__geograph.org.uk__4082537.jpg
Examples of non-Motorway lorry parks

Markham Moor lorry park on the A1

Source: Ian S, 2012
https://commons.wikimedia.org/wiki/File:Markham_Moor_lorry_park_and_diner_-_geograph.org.uk___3049901.jpg

Lincoln Farm Lorry Park on the A452

Source: Robin Stott, 2011
https://commons.wikimedia.org/wiki/File:Lorry_park_adjoining_Lincoln_Farm_Caf%C3%A9_-_geograph.org.uk___2587354.jpg
Lorry park capacity and usage in England by type, 2022 audit

Number and HGV parking capacity of lorry parks

<table>
<thead>
<tr>
<th>Type</th>
<th>Number of lorry parks</th>
<th>% of lorry parks</th>
<th>HGV parking capacity</th>
<th>% of HGV parking capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent lorry park</td>
<td>104</td>
<td>32%</td>
<td>7,390</td>
<td>44%</td>
</tr>
<tr>
<td>Local authority lorry park</td>
<td>16</td>
<td>5%</td>
<td>609</td>
<td>4%</td>
</tr>
<tr>
<td>Motorway Service Area</td>
<td>114</td>
<td>35%</td>
<td>6,688</td>
<td>40%</td>
</tr>
<tr>
<td>Trunk Road Service Area</td>
<td>94</td>
<td>29%</td>
<td>2,074</td>
<td>12%</td>
</tr>
<tr>
<td>Total</td>
<td>328</td>
<td>100%</td>
<td>16,761</td>
<td>100%</td>
</tr>
</tbody>
</table>

Usage of lorry parks for overnight parking by HGVs

- Number of lorry parks relatively equally divided between Motorway Service Areas, Trunk Road Service Areas & independent lorry parks (with local authority lorry parks only accounting for 5%)
- In terms of HGV parking capacity, independent lorry parks & Motorway Service Areas are most important (with 44% & 40%) followed by Trunk Road Service Areas (12%) & local authority lorry parks (4%)
- In terms of usage for overnight parking by HGVs in 2022, Motorway Service Areas & independent lorry parks are most important (44% & 41%) followed by Trunk Road Service Areas (13%) & local authority lorry parks (2%)

Source: calculated from data in AECOM, 2022
Lorry park ratings and pricing in England, 2022 audit

### Lorry park ratings

- 5% of lorry parks provided **no facilities** other than parking space (given rating of 0 - mostly local authority facilities)
- 15% of lorry parks provided only **toilets** (given rating of 1)
- 22% provided **toilets and catering** (given rating of 2)
- 35% provided **toilets, showers and catering** (given rating of 3)
- 16% provided **toilets, showers, catering, lighting and a security fence** (given rating of 4)
- 7% provided **toilets, showers, catering, lighting a security fence and CCTV** (given rating of 5)
- Lorry parks with rating of 4 or 5 - 39% of independent lorry parks, 25% of Motorway Service Areas, 19% of local authority lorry parks and 3% of Trunk Road Service Areas

### Lorry park overnight parking charges

<table>
<thead>
<tr>
<th>Type</th>
<th>Average</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent lorry park</td>
<td>£21.36</td>
<td>£4.50</td>
<td>£38.40</td>
</tr>
<tr>
<td>Local authority lorry park</td>
<td>£11.67</td>
<td>£2.50</td>
<td>£24.00</td>
</tr>
<tr>
<td>Motorway Service Area</td>
<td>£28.16</td>
<td>£14.99</td>
<td>£35.00</td>
</tr>
<tr>
<td>Trunk Road Service Area</td>
<td>£15.89</td>
<td>£8.00</td>
<td>£28.00</td>
</tr>
</tbody>
</table>

- Overnight parking charge **varies with facilities provided, type of lorry park and location**
- **Motorway Service Areas** have highest average parking charges (£28.16) – due to factors including lack of driver choice and having to provide services 24/7
- Average parking charges for all types of lorry park were **highest in** 2022 in **West Midlands, Eastern region & South East** & **lowest in** **North East & Yorkshire & Humberside**
- Regional price difference due to supply & demand, facilities offered, labour & other cost variations

Note: Based on the price for parking only (i.e. without any meal or shower services included).
Source: AECOM, 2022
Utilisation of overnight parking spaces in England by type of lorry park, 2022 audit

- HGVs arrive and leave lorry parks at various times of day with some staying less than an hour and others parking for long periods → the utilisation rate of lorry parks fluctuates over the course of a day and night.
- HGVs of various size and type visit lorry parks, so parks often do not mark out bays for this reason.
- Even if some space still exists at a lorry park it will not always be suitable for the arriving vehicle, and drivers may not have parked in such a way to accommodate as many vehicles as possible.
- Drivers arriving in the dark or in poor weather at a poorly lit lorry park may struggle to locate a suitable space.
- Therefore, for the purposes of the lorry parking audit, the surveyor (AECOM) agreed with the Department for Transport that once the HGVs at a lorry park reach 85% of its maximum vehicle limit, the park may in fact be full.

### Regional Overnight Utilisation of Lorry Parks (%)

<table>
<thead>
<tr>
<th>Region</th>
<th>Overnight utilisation of lorry parks (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent truckstop</td>
<td>85%</td>
</tr>
<tr>
<td>Local authority truckstop</td>
<td>52%</td>
</tr>
<tr>
<td>Motorway Service Area</td>
<td>84%</td>
</tr>
<tr>
<td>Trunk Road Service Area</td>
<td>81%</td>
</tr>
<tr>
<td>Overall</td>
<td>83%</td>
</tr>
</tbody>
</table>

Source: AECOM, 2022
# Utilisation of overnight parking spaces in lorry parks in England by region, 2022 audit

<table>
<thead>
<tr>
<th>Region</th>
<th>HGV parking spaces in lorry parks</th>
<th>Number of HGVx parked overnight in lorry parks</th>
<th>Overnight utilisation of lorry parks (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern</td>
<td>2,009</td>
<td>1,906</td>
<td>95%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>2,228</td>
<td>1,871</td>
<td>84%</td>
</tr>
<tr>
<td>South East</td>
<td>3,729</td>
<td>3,488</td>
<td>94%</td>
</tr>
<tr>
<td>Yorkshire &amp; Humber</td>
<td>1,954</td>
<td>1,292</td>
<td>66%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>2,661</td>
<td>2,443</td>
<td>92%</td>
</tr>
<tr>
<td>South West</td>
<td>1,466</td>
<td>932</td>
<td>64%</td>
</tr>
<tr>
<td>North East</td>
<td>320</td>
<td>165</td>
<td>52%</td>
</tr>
<tr>
<td>North West</td>
<td>2,107</td>
<td>1,686</td>
<td>80%</td>
</tr>
<tr>
<td>London</td>
<td>287</td>
<td>133</td>
<td>46%</td>
</tr>
<tr>
<td>England</td>
<td>16,761</td>
<td>13,916</td>
<td>83%</td>
</tr>
</tbody>
</table>

- Utilisation rate for lorry park overnight across whole of England was 83% in 2022 audit - this is only just below 85% threshold at which lorry parks are deemed to be full
- Utilisation rates highest in Eastern (95%), South East (94%) and East Midlands (92%) regions

**Notes:**
Average utilisation per region masks individual lorry parks where demand exceeds supply.
The surveys were undertaken at 'average' times of year, utilisation figures would be higher in peak periods
Source: AECOM, 2022
Utilisation status of lorry parks in England by region, 2022 audit

<table>
<thead>
<tr>
<th>Region</th>
<th>Acceptable (less than or equal to 69% full)</th>
<th>Serious (70-84% full)</th>
<th>Critical (equal to or greater than 85% full)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern</td>
<td>23%</td>
<td>23%</td>
<td>55%</td>
<td>100%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>36%</td>
<td>17%</td>
<td>47%</td>
<td>100%</td>
</tr>
<tr>
<td>South East</td>
<td>41%</td>
<td>17%</td>
<td>42%</td>
<td>100%</td>
</tr>
<tr>
<td>York &amp; Humber</td>
<td>54%</td>
<td>14%</td>
<td>32%</td>
<td>100%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>31%</td>
<td>15%</td>
<td>54%</td>
<td>100%</td>
</tr>
<tr>
<td>South West</td>
<td>61%</td>
<td>5%</td>
<td>34%</td>
<td>100%</td>
</tr>
<tr>
<td>North East</td>
<td>75%</td>
<td>0%</td>
<td>25%</td>
<td>100%</td>
</tr>
<tr>
<td>North West</td>
<td>42%</td>
<td>8%</td>
<td>50%</td>
<td>100%</td>
</tr>
<tr>
<td>London</td>
<td>60%</td>
<td>20%</td>
<td>20%</td>
<td>100%</td>
</tr>
<tr>
<td>England</td>
<td>42%</td>
<td>14%</td>
<td>44%</td>
<td>100%</td>
</tr>
</tbody>
</table>

- In 2022 audit, across England as a whole, **44% of lorry parks (143 lorry parks) were at a critical utilisation rate** (i.e. deemed full at the time of the survey), with 14% having a serious utilisation rate and 42% an acceptable utilisation rate.
- Regions with highest proportion of parks with critical status (i.e. full) were Eastern (55%), East Midlands (54%), North West (50%), West Midlands (47%) and South East (42%).

Note: The surveyor ascribed lorry park utilisation to one of the following three categories depending on the vehicles present at a park and its maximum limit: i) acceptable level of utilisation (less than or equal to 69% full of HGVs), ii) serious level of utilisation (70-84% full of HGVs), and iii) critical level of utilisation (equal to or greater than 85% full of HGVs).
Source: calculated from data in AECOM, 2022
• Although number of lorry parks in England increased between 2011 and 2017 and between 2017 and 2022, number of vehicles observed parking in them grew more strongly
• As a result, lorry park utilisation rates were higher in all regions in 2022 than in any previous audit
• In England as a whole, lorry park utilisation rate has risen from 57% in 2006, to 61% in 2011, to 76% in 2017, to 83% in 2022

Source: calculated from data in AECOM, 2022
Overnight lorry park capacity shortage in Kent

- Although lorry parking capacity shortages exist in many regions, pressures greatest in Kent
- Kent has very high demand (5,000-10,000 HGVs daily into / out of UK via Port of Dover & Eurotunnel
- Long-standing problem in Kent - in 1988, ‘Operation Stack’ (contraflow traffic arrangement on the Dover-bound side of the M20) put in place to cope with HGVs Channel crossing road traffic when delays occurred
- Situation worsened by Brexit checking requirements – ‘Operation Stack’ changed to ‘Operation Brock’ to cope with even greater numbers of queuing HGVs (plus Dover TAP – ‘temporary’ traffic management system introduced in 2015)
- 94% of lorry park spaces in South East region (in which Kent is situated) observed to be in use overnight in 2022 audit (substantial increase on 84% observed in 2017 audit)
- Additional 1,700 lorry park spaces required if all HGVs parking overnight in South East (including 28% of HGVs parking in lay-bys & kerbsides in industrial estates) to be accommodated in lorry parks
- Efforts by Kent County Council & UK Government to limit overnight HGV lay-by parking through Traffic Regulation Orders (TROs) & clamping/fines
- New lorry park in Ashford opened in 2021 with capacity for 300 HGVs – lorry park provision remains well below required quantity
Examples of HGV parking in lay-bys and on public roads

Overnight parking in lay-by, West Yorkshire

Overnight parking at kerbside in an industrial estate, Kingston Upon Hull

Source: Ian S, 2011
https://commons.wikimedia.org/wiki/File:Parking_up_for_the_night_-_geograph.org.uk-_2497778.jpg

Source: Ian S, 2013
https://commons.wikimedia.org/wiki/File:Polish_lorries_parked_up_for_the_night_-_geograph.org.uk_-_3653653.jpg
As well as using lorry parks for overnight parking, HGV drivers also make use of lay-bys and kerbsides in industrial estates on public roads.

While the proportion of HGVs using lorry parks has increased between 2011 and 2022, absolute number of HGVs requiring overnight parking space grew by 55% between 2011 and 2022.

Has resulted in growing number of HGVs parking at kerbsides in industrial estates and lay-bys (approximately 7,300 HGVs each night in 2022, which was 34% of all HGVs parked overnight).

Policy makers prefer HGV drivers to use lorry parks for overnight parking rather than lay-bys and kerbsides in industrial estates (due to factors including safety, security, facilities, traffic impacts and nuisance).

However, policy measures and public funding has not been put in place to facilitate this.

Source: calculated from data in AECOM, 2022
The choice of where to park overnight depends on factors including lorry park prices, who pays for lorry park usage (driver or business), lorry park space availability and lorry park location compared to vehicle journey.

In 2022, the proportion of parking in industrial estates was greatest in North East, London and North West regions, and lay-by parking greatest in South West, North East and Eastern regions.

In 2022, in all but one region between 28-44% of HGVs were parked in industrial estates and lay-bys rather than in lorry parks. However, in North East this accounted for 73% of all HGV parking.

The number of HGVs parking at kerbsides in industrial estates and in lay-bys on public roads varies by region and was higher in 2022 than in previous audits in 2011 and 2017 in several English regions.

Source: calculated from data in AECOM, 2022
Overnight parking in England by UK and non-UK registered HGVs


- **Non-UK registered HGVs as a proportion of total HGVs parked overnight** in any location type in England **has increased** in each audit, from 18% in 2011, to 25% in 2017, to **27% in 2022**
- **A greater proportion of non-UK registered HGVs use lorry parks than UK registered HGVs** in 2011, 2017 and 2022
- This difference was especially marked in the 2022 audit, with **80% of non-UK registered HGVs found to use lorry parks compared with 60% of UK-registered HGVs**
- Consequently, smaller proportion of non-UK HGVs park overnight in lay-bys & kerbsides in industrial estates than UK HGVs

Source: calculated from data in AECOM, 2022
• In 2017 and 2022, regions most used by non-UK HGV drivers for overnight parking were (in order of importance) South East, East Midlands and Eastern regions
• In 2022, non-UK HGVs comprised approximately half of all HGV overnight parking in South East region
• Vast majority of these non-UK HGV drivers select South East as their overnight stopping location given that their journeys to and from mainland Europe often take place via Port of Dover and Channel Tunnel
• In 2022, non-UK registered vehicles accounted for 38% of all HGVs parked at independent lorry parks, 32% of all HGVs parked at Motorway Service Areas, 19% of all HGVs parked at Truck Road Service Areas and 12% of all vehicles parked at local authority lorry parks across England

Source: calculated from data in AECOM, 2022
Survey work with HGV drivers about overnight HGV parking in 2008 and 2016

• 2008 survey of HGV drivers results showed (AECOM, 2008):
  - Overnight parking charge was key reason for drivers not using lorry parks, followed by the (in)convenience of their location
  - 76% of HGV drivers surveyed had overnight lorry park charges paid for them by their companies in some form
  - The 24% who have to pay to use these facilities themselves were most likely to use lay-bys / public roads in industrial estates overnight
  - Drivers’ opinions of independent lorry parks varied, with the majority holding very negative views while others felt they were better than Motorway Service Areas (MSAs)

• 2016 survey of HGV drivers using MSAs for rest breaks & overnight stops showed (Transport Focus, 2016):
  - Drivers felt MSAs suffered from range of problems including inadequate parking space, being too expensive, offering insufficient vehicle security, too noisy, and offering too much ‘fast food’
  - Participants felt that although independent lorry parks varied considerably in facilities offered & quality, they were often preferable to MSAs
Proportion of HGV drivers rating features of stopping facilities at MSAs as fairly good or very good, 2017-2020

- Regular survey of HGV drivers about stopping facilities at Motorway Service Areas (MSAs)
- Results show proportion of HGV drivers that rate each factor as ‘fairly’ or ‘very’ good (rather than poor)
- Value for money, shower availability and shower cleanliness were less well rated in 2020 than in 2017, while parking availability was rated higher in 2020 than other years, potentially due to Covid-19 related effects on traffic levels

Note: Samples sizes were approximately a third lower in 2020 than in previous years due to interviewing being cut short by the outbreak of Covid-19.

Proportion of HGV and coach managers rating features of stopping facilities on the SRN as fairly poor or very poor, 2018-2022

- Regular survey of HGV and coach managers about stopping facilities on Strategic Road Network (SRN)
- High proportion of respondents rated all five factors of roadside facilities on SRN roads as poor (either ‘fairly’ or ‘very’ poor)
- Value for money rates worst of all five factors
- Proportion of respondents rating factors as fairly or very poor has increased since the 2018 survey


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<td>Availability of spaces for your vehicles</td>
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<td>61%</td>
<td>56%</td>
<td>62%</td>
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<td>Security of your vehicles when parked</td>
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<tr>
<td>Their value for money</td>
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<td>Value for money</td>
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<td>Shower cleanliness</td>
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<td>68%</td>
<td>58%</td>
<td>66%</td>
<td>61%</td>
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Note: Samples sizes were approximately a third lower in 2020 than in previous years due to interviewing being cut short by the outbreak of Covid-19.
Online survey of HGV drivers about overnight HGV parking in 2022

• **2022 online survey of HGV drivers with 364 respondents** (95% from UK and 92% male) (AECOM, 2022)

• **Barriers noted as ‘very important’ to using lorry parks of all types** with charge for overnight parking (in order of importance): ‘security not being good enough’ (81% of respondents) ‘wash/shower/toilets not being good enough’ (78%), ‘not enough spaces available’ (74%), ‘tend not to be worth the money’ (62%), ‘food not good enough’ (58%) and ‘company won’t cover the cost/full cost’ (44%)

• **Facilities deemed ‘very important’ when parking overnight at lorry park with a charge** (in order of importance): ‘well maintained toilets and showers’ (91% of respondents), CCTV (80%), ‘security staff’ (73%), ‘security fence’ (68%), ‘good value food’ (67%), ‘security lighting’ (66%), ‘convenient location to route (57%), ‘controlled gate entry’ (46%), ‘fuel’ (41%), and segregated male & female facilities (40%)

• When asked about the **availability of good quality overnight HGV parking in the last five years** (free or with a charge), 79% of respondents believed that it had decreased, 11% thought while it has stayed about the same, 7% thought it had increased, and 3% did not know.

• When asked about **HGV crime in the last five years**, 92% of respondents believed it had increased, 4% felt it had stayed about the same, 1% felt it had decreased, and 3% did not know

• For **daytime parking areas, factors deemed to be ‘very important’** (in order of importance): ‘toilets’ (87% of respondents), ‘no parking fee’ (78%), ‘litter bins that are emptied regularly’ (69%), ‘convenient location (62%), ‘secure parking’ (47%), ‘hot food’ (44%), ‘shop’ (34%), and ‘seating area’ (24%)
Planning permission challenges faced by lorry park developers in UK

• Lorry parks operated by private sector companies with exception of few local authority owned & operated ones

• First 20 Motorway Service Areas still owned by Government and leased to operators

• Private developers decide on location and size of site, facilities provided (beyond minimum Government standards), level of site security offered, and method of privately funding it

• Developer has to apply to local planning authority for planning permission to carry out development
  • Substantial cost in preparing such planning applications
  • Many planning applications rejected due to objections from local residents
  • Even if eventually accepted, cost of resubmissions and alterations required to gain permission is often considerable
  • Time taken to obtain planning permissions can be substantial adding to cost and uncertainty
Other challenges & issues faced by lorry park operators & developers in UK (1)

- New lorry parks often require considerable **land which is expensive to acquire**
- **Construction/infrastructure costs also substantial** (given electricity, water, sewerage, building & parking requirements)
- **Operating costs can also be considerable** given staffing requirements & business rates for such sites
- **Financial returns** to be made from operating lorry parks often **relatively low** - due to space required per HGV parking space & relatively low spend per driver/parked vehicle
  - Low driver spend due to low profitability of road freight transport sector and who pays for lorry park use (with some drivers not purchasing food, drink and other services available)
  - Main source of revenue from HGV drivers using lorry parks is usually parking charge
  - Motorway Service Areas and other roadside facilities catering to car users typically more profitable than services provided to HGV driver
- Lorry parks therefore often not deemed particularly financially attractive by private sector investors
Other challenges & issues faced by lorry park operators & developers in UK (2)

- New lorry parks have at least 12-15 year payback period which can discourage developers (AECOM, 2022)
- Land that could be used for lorry parks often used for other purposes, given relative financial return of other uses
  - Proximity to Strategic Route Network and quantity of passing traffic makes such sites attractive for hotel, office, business park & retail park developments
- Some lorry parks owners encouraged to sell by developers who wish to acquire the site for more profitable uses
- Some local authorities that ran lorry parks closed these for redevelopment/sale due to more financially attractive uses
Issues with local authority operated lorry parks in UK

• There were only 16 local authority operated lorry parks (out of 328) in England in 2022 (i.e. 5% of total) & these provided only 4% of total lorry park spaces in England (AECOM, 2022)

• The same commercial issues discussed on previous slides also explain why there are so few local authority operated lorry parks

• Even where local authority lorry parks do exist they tend to provide only basic facilities
  
  • 50% of local authority lorry parks offered only parking & 25% only parking and toilets in England in 2022 (AECOM, 2022)

• Some local authorities that ran lorry parks have closed these for redevelopment/sale for more financially attractive uses
Lorry parks - situation in EU

• In 2018, a European Commission study identified (Panteia, 2018; de Leeuw van Weenen et al., 2019):
  - 5,000 lorry parking sites across the EU28 that were estimated to provide approximately 300,000 HGV spaces per night
  - Approximately 20% of these overnight parking spaces located in a small number of countries provided some level of secure parking
  - Net shortfall calculated of around 100,000 designated overnight HGV parking spaces in total in the EU28

• 2021 CEF Transport call for proposals has made an additional €250 million available to support further lorry park upgrades and new developments across the EU (European Commission, 2022a)

• New European Commission standards for safe & secure HGV parking areas (European Commission, 2021, 2022):
  - adopted in 2021 to support development of network of safe & secure HGV parking areas throughout the EU to improve rest facilities for drivers & protect them from violence and vehicle/cargo crime
  - in new EU standard, lorry parks categorised according to four security levels: bronze, silver, gold & platinum with factors used to determine site’s security rating include security of its: (i) perimeter, (ii) parking area, (iii) entry/exit points, & (iv) staff procedures
  - In addition to level of security, all sites must provide drivers with access to facilities including showers, toilets, food & drink services, & internet connection

• This new standard goes alongside the new requirement that such facilities are required to be available at least every 100 km along the Trans-European Transport Network
Lorry parks - situation in USA

• 1996 study identified shortfall of overnight & rest area parking spaces for goods vehicles existed throughout United States - 80% of public rest areas & 53% of private lorry parks full overnight & estimated 28,000 shortfall in overnight lorry parking spaces (Federal Highway Administration, 1996)

• 2000 study also identified insufficient number of overnight parking spaces for HGV drivers in United States - shortfall in parking space expected to increase due to growing HGV traffic (National Transportation Safety Board, 2000)

• 2015 report found 75% of HGV drivers & 66% of logistics personnel reported regularly experiencing problems finding safe parking, with 90% reporting struggling to find safe & available parking during night hours (increased to 98% by 2019)(Federal Highway Administration, 2015)

• Although HGV parking spaces nationwide increased 6% in public areas & 11% in private areas between 2014-2019, growth in demand for parking space outstripped this, resulting in growing shortfall. But 79% of lorry park operators do not plan to increase parking space (reported in Lockridge, 2022)

• 2021 study of top ten road freight industry concerns found HGV parking shortages came fifth. Lack of available lorry parking has made top ten list of industry concerns every year for last decade. Among commercial drivers it has consistently ranked in their top three concerns (ATRI, 2021)

• In 2022, US Department of Transportation announced $38.5 million in grants for truck parking projects - this announcement built on the commitments of Biden-Harris Administration’s Trucking Action Plan (The White House, 2021)

• US President’s Bipartisan Infrastructure Law (BIL) enacted in 2021 require US States to “include assessment of the adequacy of commercial motor vehicle parking in their State Freight Plans”
Conclusions – Overnight HGV parking

• Supply and demand for overnight lorry park spaces not well matched across England for at least last fifteen years and probably far longer
  • National lorry park utilisation at very close to critical levels in 2022 audit (83%)
  • 34% of all overnight HGV parking in 2022 took place in lay-bys and kerbsides in industrial estates rather than in lorry parks
  • A shortfall of approximately 7,000 overnight HGV parking spaces in lorry parks in England in 2022 –equivalent to 34% of all HGVs parked overnight

• UK Government and local authorities have responded by imposing more parking restrictions on overnight parking in public roads and lay-bys (such as in Kent) rather than by helping to increase lorry park HGV capacity

• Private sector is deemed responsible for lorry park provision by UK Government
  • Private sector has not been increasing lorry park capacity in line with demand for overnight HGV parking many years
  • This is due to range of factors concerning the economics of operating lorry parks compared with other land uses together with planning delays and refusals by local planning authorities for new lorry parks
Conclusions – HGV drivers visiting sites for collections and deliveries

- HGV drivers making collections & deliveries to sites not operated by their employer can experience difficulties obtaining:
  - Access to toilet and handwashing facilities
  - Parking space to take a legally required rest break
- Providing access to toilets is a legal requirement but is not readily monitored or enforced by HSE
- Failure to provide parking space for rest breaks may be due to insufficient total parking area at site
  - A flaw of current planning approval system for new buildings in which HGV trip generation and HGV parking space requirements are underestimated
  - Compounded by developers wanting to include little non-value added HGV parking space
Conclusions – Other freight driver and rider welfare needs

• Consideration of the welfare needs of drivers and riders working in urban areas providing goods and services has received very little attention from government or industry

• Operators of commercial buildings and those in residential homes they visit to perform their activities (i.e. goods delivery/collection and servicing tasks) often do not provide them with toilets and washing facilities in the course of their daily work

• Many of these workers often have to wait between job allocations or take mandatory breaks without the provision of indoor waiting areas and rest areas provided when while waiting for their next job assignment

• They can be exposed to the prevailing weather (if they do not have an enclosed vehicle) and are at greater risk of crime to themselves and their vehicles

• They also often have nowhere to safely and secure leave their vehicle while obtaining and consuming food and drink
Conclusions - Welfare needs of goods & service vehicle drivers & riders need to be addressed

• Safe and secure overnight HGV parking facilities at reasonable prices

• Welfare needs and facilities for HGV drivers at sites they visit (access to toilets and rest break parking space)

• Welfare needs and facilities for other drivers/riders making deliveries/collection and providing services
  • access to toilets, secure waiting areas between jobs/for rest breaks, and secure vehicle parking space while accessing food & drink provision

• Requires joint working between national and local government and industry
Importance of meeting driver welfare needs

• Lack of action on driver welfare facilities likely to add to existing UK shortages in freight workers driving HGV and other vehicles
  • Recruitment and retention of freight transport workers likely to become ever more challenging
  • Impacts on all sectors of the economy both public and private, resulting in delays in obtaining goods and services and disruption to supply chains

• Therefore urgent need for joint working between national/local government and industry, improved planning strategy, and enhanced UK Government / devolved administration planning guidance for local authorities
Autonomous vehicles

• When fully connected autonomous vehicles (CAVs) (level 5 – i.e. without the need for drivers to be present) are available for use on public roads these will fundamentally change the level of demand for HGV overnight and daytime driver rest locations

• This needs to be borne in mind in efforts to resolve current parking problems

• However, human personnel still likely to be required to carry out goods movement and delivery from these vehicles to receiver so toilet/handwashing and other welfare needs of these workers will remain
Recommendations (1) - Research needs for overnight HGV parking

- Overnight lorry parking audits in England in 2011, 2017 and 2022 have not reported on (and possibly did not study):
  - Extent to which prices charged, location in relation to the SRN, and the range and quality of facilities provided at a lorry park are linked to its occupancy rate
  - The importance of various factors in HGV driver decision-making about the choice of lorry park they use (such as (lack of) available space, price, location from the SRN, security features, and the range and quality of facilities provided)
  - The decision-making factors that result in HGV drivers decided not to use lorry parks and to instead park overnight in lay-bys or industrial estates (including consideration of the extent to which such drivers do so by choice or due to lack of space in lorry parks). These include the financial support towards the cost of using lorry parks from their employers and/or customers, the form that this financial support takes and the method by which it is made)

- Ever-improving sleeper cabs and in-vehicle facilities may have fundamentally changed some drivers’ views about the whether they want to use lorry parks at all and, if they do, the services that they require at them. Survey work with drivers using lay-bys and kerbsides in industrial estates could help gain insight into this

- Little, if any, recent research has studied the safety, security and traffic congestion impacts of HGV overnight parking in lay-bys and industrial estates. Such work is necessary to understand the dangers posed by these practices and measures that can be taken by drivers and enforcement agencies to ensure that unsafe practices do not occur and that HGV drivers and other road users are not placed at undue risk
Recommendations (1) - Research needs for overnight HGV parking (cont.)

- Research into understanding the impact of who pays for overnight HGV parking (driver themselves or business they work for) and whether this influences overnight parking choices should be carried out.

- Planning objections from local residents are often an important factor in the rejection of planning applications for new and extended lorry parks. Research is needed to understand whether these objections by local residents are based on objective traffic safety risks or disturbance impacts of having vehicles travelling in their locality.

- HGV drivers may be having to drive additional mileage to find overnight parking spaces (due to shortage of them) and thereby adding to HGV mileage and its traffic, social and environmental impacts. Similarly, difficulties finding overnight parking space may encourage drivers to drive for less time than driver’s hours permit due to concern about finding somewhere to park. These factors could be resulting in the need for more HGVs to be operating on the roads and for more HGV mileage to be travelled than would be necessary if overnight parking space was more readily available and warrants research.

- Devolved administrations in UK need to also carry out such lorry parking data capture and analysis so that national provision is understood.
Recommendations (2) – Reforms to planning system by UK Government

• Should recognise lorry parks as key national infrastructure assets & put in place measures to increase capacity

• Must go beyond minor word changes & vague sentences added to the National Planning Policy Framework (NPPF), the circular on SRN and lorry parking provision, & other guidance for local planning authorities (as has happened in past)

• DfT revised circular on SRN and lorry parking provision in 2022 states lorry parks not to be closed where demand exists & National Highways to work with local planning authorities to address parking space shortage but greater detail required on how this will be achieved

• NPPF & other guidance should set out HGV parking capacity & facilities that should be made available

• Could take direct responsibility for lorry park planning applications given their national importance

• Should ensure that all relevant departments with an input to lorry park provision (including the Department for Transport, and the Department for Levelling Up, Housing and Communities) work closely together on necessary planning reform

• Should put in place targets for the next 5 & 10 years for the provision of additional lorry park capacity that will be delivered, for overnight lorry park utilisation & for the proportion of all HGVs that park in lorry parks overnight & check on progress
Recommendations (2) – Reforms to planning system by UK Government (cont.)

- Should require National Highways, regional transport bodies & local authorities to pay proper regard & attention to need for lorry parks, including identification of suitable sites which should be identified in Local Plans
- Need for improvements to planning system for faster and more positive decisions on permission for lorry park applications
- New warehouses & logistics parks should have sufficient daytime & overnight lorry parking capacity & facilities included as planning condition, with these made available to all HGVs visiting site – needs to go beyond minor change made to NPPF in 2021
- The above requires new methodology for HGV trip generation in planning applications for logistics developments
- Set up a Government-Industry taskforce to address lorry parking problems & wider driver welfare issues
- Changes made by DfT to minimum lorry park facility requirements in Dec 2022 relatively minor – need for overall rating system for lorry parks based on facilities they offer and specification of these standards
- Above recommendations also apply to devolved administrations in UK
Recommendations (3) – Methods of funding greater lorry park capacity

• In 2022, House of Commons Transport Select Committee recommended that if road freight transport industry has not resolved lorry parking issues within two years, the Government should implement Supply Chain Levy to make industry meet costs of building extra lorry park capacity (applying this Levy to production & sales end of the supply chain – e.g. large retailers & oil companies)

• In response, UK Government did not directly answer this recommendation, instead reiterating its announced £50 million investment & need for a modernised planning system

• UK Government should seriously consider this Levy mechanism as means by of funding additional lorry park capacity required

• Local authority lorry parks:
  - are few in number & capacity (only 16 such lorry parks in England with total parking capacity of 609 spaces in 2022 – AECOM, 2022)
  - tend to be most basic in terms of facilities they provide
  - far more of these parks have closed than opened over time – not viewed as a priority by local authorities who sometimes sell sites for redevelopment by private developers for other uses
Recommendations (3) – Methods of funding greater lorry park capacity (cont.)

• With proceeds of Supply Chain Levy, UK Government could:
  - oversee provision of more motorway and A-road HGV lorry park capacity (operating them themselves or by making Levy funding available to private lorry park operators)
  - make funding available to local authorities or private operators to provide more lorry park provision with only basic facilities which could be made available to HGV drivers either freely or cheaply (with such lorry parks likely to prove successful in reducing overnight HGV parking in lay-bys & kerbsides in industrial estates given price is a key factor in parking location choice for many of these drivers)

• If UK Government is of opinion that use of lay-bys & industrial estates for overnight parking must be reduced it could make businesses that employ/use HGV drivers to transport their goods over long distances legally responsible for booking lorry parks & paying directly for them on

• Businesses could also make this a condition of their logistics contracts & Corporate Social Responsibility statements
Recommendations (4) – Other methods of improving lorry parking / driver welfare situation

• Lorry parking information systems (including both roadside availability signs & real-time online/mobile phone app parking availability data) could be used to provide drivers with up to the second information about the availability of lorry park space (to assist drivers in finding space nearby and booking it)

• Government needs to work with industry to determine the locations in which new & expanded lorry parks are required, as well as to ensure large sale planning reform to ensure that planning applications for this nationally important infrastructure are dealt with positively & promptly & determine appropriate ways which objections from the local community are addressed

• Government & trade associations could work together to identify further opportunities for and to promote open & closed collaborative networks for off-street overnight lorry parking (such as SNAP & Transport Association)

• Two-person crews for long distance HGV journeys can help significantly reduce need for HGV overnight and daytime parking as commonly done in USA – one driver sleeps while other drives. Could be considered for UK but changes to drivers’ hours rules necessary for two person crews to operate in this way

• Drop trailer operations can reduce demand for overnight HGV parking space & may be popular in attracting drivers into industry as it reduces need to be away from home overnight but requires provision of suitable spaces where trailers can be deposited/ transferred
Recommendations (4) – Other methods of improving lorry parking / driver welfare situation (cont.)

• Although unaccompanied RoRo sea freight has greater handling costs than accompanied roll-on, roll-off HGV crossings it has less delay and vehicle checking costs than accompanied RoRo occurring in recent years for Dover/Channel Tunnel crossings
• If these delays persist, businesses may reorganise their logistics operations to make greater use of unaccompanied RoRo which also generated less demand for overnight HGV parking
• UK Government needs to better ensure driver access to toilets at buildings receiving HGV collections & deliveries are made clear to the operators of such buildings and robust enforcement system put in place to deal with contraventions
• UK Government needs to reform trip generation methodology for HGVs visiting new, large developments to ensure sufficient rest break parking space included in site and that this is made available to visiting drivers
• Local authorities have role to play in reviewing/providing driver welfare facilities (toilets, covered rest areas, secure vehicle parking facilities) in their localities especially for urban delivery and service workers (often linked to online shopping) who use vehicles including bicycles, cargo bikes, mopeds and motorbikes) - requires assessment of existing adequacy as well as increasing public provision where deemed inadequate