

Heavy Goods Vehicle (HGV) Parking and Driver Welfare Match Funding Grant Scheme (MFGS)

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1. Executive Summary

1.1 Background

In November 2022, the Department for Transport (DfT) introduced the Heavy Goods Vehicle (HGV) Parking and Driver Welfare Match Funding Grant Scheme (MFGS). This report describes the MFGS as 'the scheme' from this point. The scheme's objective was to improve lorry parks, where HGV drivers rest, to contribute to the overall aim of improving HGV driver recruitment and retention rates. The Scheme was provided under s.40 of the Road Traffic Act 1988, which authorises the Government to contribute to costs incurred by organisations (other than local authorities) for promoting road safety, including measures that enhance the welfare of drivers. The scheme provided match funding to lorry park operators to support improvements in one or more of the following areas:

- **Facilities to support driver welfare**, such as toilets and showers (including gender specific and disabled facilities), café and lounge/seating areas, truck wash and other adjustments to meet the accessibility needs of drivers with limited mobility.
- **Security improvements**, such as entrance gates, secure fencing, lighting, CCTV and monitoring equipment.
- **Parking improvements** to increase HGV parking capacity, either through the layout or extending the designated parking area. Parking area improvements could also include resurfacing to improve the quality of the area.
- **Decarbonisation improvements** such as electric HGV charging infrastructure, alternative fuel installation and solar energy.

DfT commissioned the National Centre for Social Research (NatCen) and AECOM to deliver a process and impact evaluation of the scheme. This report summarises the evaluation of sites that applied for and completed works by 31 March 2025.

1.2 Approach

The evaluation approach consisted of:

- A **Theory of change** to set out how the scheme's outputs were anticipated to contribute to specific outcomes and ultimately to the intended impacts.
- **Process Evaluation** delivered through 15 in-depth interviews with lorry park operators to consider how the scheme was managed, communicated and delivered.
- **Impact evaluation** consisting of 1,224 surveys (of which 1,118 were interviewer administered and 106 translated into one of four languages for self-completion), along with 20 in-depth interviews with HGV drivers at lorry parks. The survey and in-depth interviews assessed driver awareness of lorry park improvements and considered the impact of each improvement. In addition, five in-depth interviews were undertaken with representatives of freight haulage industry bodies (industry stakeholders) to obtain views of the scheme, how it was introduced, the perceived impact for drivers and broader outlook.
- **Contribution Analysis (CA)** adopted to frame the data analysis and evaluation. This theory-based evaluation approach brought the different elements of the evaluation together to create a fuller understanding of the influence of the

scheme and other, often external factors, such as driver pay and conditions. In conducting the CA, evidence was rated for strength (strong, moderate, weak) based on the number and consistency of data sources. Confidence in the scheme's contribution was assessed (high, medium, low) according to the extent the evidence indicated that the intervention was crucial to the outcome, filled key gaps, ruled out alternatives, and demonstrated a clear causal link to outcomes (see Section 6.1 for further information).

1.3 Limitations

The evaluation had certain limitations, which should be considered when interpreting the findings. The main limitations were:

- **Lack of baseline data:** The evaluation did not include a pre-improvement survey, meaning that driver ratings of lorry parks before the scheme are unknown.
- **Recall gap:** There was a gap of approximately 6-12 months between the lorry park being in its original condition and the point at which the survey and in-depth interviews were conducted about the improvements. This created a risk of recall bias, where drivers might unintentionally misremember and either overstate or understate the impact of improvements. Process evaluation in-depth interviews took place up to 18 months after the application, which could again affect recall.
- **Issues with lorry park selection:** Only a few independent lorry parks completed works on time, which was a set criterion for inclusion in the evaluation. All independent lorry parks which had completed works were therefore included in the evaluation as the sample was not large enough to support any selection process. This created a risk of sample bias, as it was not possible to randomly select lorry parks.
- **Limited time since works completed:** Lorry parks were evaluated within one year of completing works, which limited the ability to assess the longer-term impacts of the scheme. For instance, the evaluation could not determine whether operators would maintain improvements over time or how this might affect drivers' attitudes. It was also too early to objectively measure longer-term outcomes such as increased driver recruitment and retention or reductions in freight crime.

Section 3.5 provides further detail and the full list of limitations.

1.4 Process evaluation – headline findings

The process evaluation identified areas of the scheme that operators considered both positively and negatively, including:

- **Delivering improvements:** The scheme enabled operators to make improvements, some of which would not have happened or would have taken longer to achieve in the absence of the scheme.
- **Awareness:** Operators became aware of the scheme at different times during the application windows, and often long into the process. Late awareness of the scheme limited the time available for operators to effectively plan and deliver improvements. However, learning about the scheme through multiple channels helped build their confidence in its credibility.

- **Application process:** This was considered straightforward by operators, with clear information, which was well set out.
- **Barriers to applying:** Applications for larger projects were perceived as more challenging to complete and more difficult to deliver on time. Key risks for operators included limited resources to complete applications and a lack of experience with funding schemes. Independent operators had a more limited ability to absorb financial risk during implementation than larger operators.
- **Funding criteria:** Decarbonisation investments, such as new lighting or hot water systems, were considered higher risk by operators as they are more expensive, sometimes unproven, and offer fewer direct benefits to drivers.
- **Approval and contracts:** Approval time and contract negotiations were felt to be too long, which reduced the time available to deliver the improvements.

1.5 Impact evaluation – headline findings

Sixty-six grants were awarded to Lorry Parking operators across 30 counties in England. The evaluation triangulates evidence from the driver survey and in-depth interviews with drivers and industry stakeholders to understand whether the scheme's improvements meaningfully enhanced drivers' perceptions and experiences of using lorry parks. By examining both awareness and the reported perceptions of upgraded facilities, security and parking, the evaluation assessed the extent to which these investments contributed to the scheme's broader objectives.

The reported impact of the improvements made was based on drivers' recall from previous visits to the lorry parks. Out of the 1,224 drivers surveyed, 1,057 had visited the lorry park following the improvement works in the past year. The following reported impacts of improvements are based on this subgroup. Eighty one percent of these drivers noticed at least one improvement at a lorry park.

Facilities

Two-thirds (66%) of the 639 driver survey respondents who had visited lorry parks with toilets and shower improvements noticed them. Of those who noticed improvements:

- 93% of 370 drivers agreed the toilet and shower block felt modern and fresh.
- 86% of 319 drivers agreed the quality of showers had improved.
- 85% of 376 drivers agreed the number of toilets had improved.
- 79% of 341 drivers agreed the number of showers had improved.

Seventy percent of the 448 drivers who had visited lorry parks with café or lounge/seating area improvements noticed them. Of those who noticed improvements, 95% of 274 drivers agreed the café and/or lounge/seating area had improved.

Driver in-depth interviewees highlighted specific benefits associated with café improvements, such as having a comfortable space to sit and eat outside their cab, the chance to socialise with other drivers and better food quality.

The evidence highlighted that improvements to these facilities contributed to making HGV drivers feel valued and enhanced the quality of overnight stops at lorry parks. Our analysis showed high confidence that the scheme enabled drivers to use more facilities, which in turn increased overall driver satisfaction. It also showed weak

evidence and, as a result, low confidence that the scheme contributed to improving drivers' attitudes towards lorry parks.

Security

Thirty-five lorry parks received funding for improvements to vehicle and personal security. Half (53%) of the 315 driver survey respondents who had visited lorry parks with security improvements noticed them. Of those who noticed improvements and answered the follow-up questions:

- 83% of 166 drivers agreed vehicle security had improved.
- 78% of 166 drivers agreed personal security had improved.

Drivers rated fencing, gates, lighting and CCTV highly as mechanisms for improving security. Some driver in-depth interviewees thought that CCTV was only truly effective when monitored in real time by on-site security staff, however the provision of staff was outside the scope of the scheme. Industry stakeholders noted that CCTV improvements also provided longer term benefits by supporting crime response and the apprehension of offenders. Lighting was mentioned less frequently by drivers, possibly because the surveys took place during the summer or because some lorry parks made less noticeable changes, such as switching to more energy efficient bulbs. Overall, the evidence indicated that the scheme contributed to improving drivers' sense of security when using lorry parks.

Parking

Two thirds (67%) of the 638 driver survey respondents who had visited lorry parks with parking improvements noticed them. Of those who noticed improvements:

- 85% of 425 drivers agreed parking had improved.
- 77% of 425 drivers agreed they were more confident finding a parking space.
- 89% of 322 drivers agreed road surface quality had improved at the lorry park.

The scheme funded improvements for the reconfiguration of existing parking bays, including new markings and resurfacing, both of which increased capacity without using extra land. There was a high level of confidence that this contributed to drivers finding it easier to enter, manoeuvre around and exit lorry parks and parking spaces. A further benefit was lessening the concern of being blocked in overnight by vehicles parked outside/across designated bays.

Decarbonisation

The scheme included funding to support the decarbonisation of facilities at lorry parks. However, only a few operators applied for this funding and those who did, primarily used it for energy efficiency measures such as installing new boiler systems to improve hot water provision. As these improvements were generally not visible or directly noticeable to drivers, this aspect was excluded from the impact evaluation.

Driver retention and recruitment

The overall aim of the scheme was to support improvements in driver retention and recruitment by providing higher quality facilities, thereby improving working conditions and enhancing job satisfaction. In terms of retention, driver in-depth interviewees reported that high quality facilities helped them to feel more positive, which could contribute to higher job satisfaction. Parking and security improvements were identified as priorities for future investment, with drivers highlighting that these

would further enhance perceptions of lorry park quality. Some drivers noted that difficulties finding somewhere to stop was demoralising, potentially reducing satisfaction with lorry parks and negatively affecting retention. Improvements to café and lounge/seating areas were also highlighted by drivers as helping them to feel more valued by offering a pleasant space to relax.

The in-depth interviews explored factors that might influence drivers to leave the industry, as well as those that could encourage them to stay. While the scheme was seen as contributing to several outcomes that influenced driver retention, there was only a medium level of confidence that it had contributed to improving driver retention due to the range of alternative explanations that could not be validated through the evaluation. Alternative explanations included driver pay/conditions, working hours and individual company policies.

The in-depth interviews with drivers highlighted that they were less knowledgeable about the factors that could influence recruitment, as this was not a decision-making process they would need to make. Drivers felt that the quality of facilities, parking and security at lorry parks would be low priority for someone considering taking employment as an HGV driver, with pay and the time spent away from home being more important.

Impact evaluation summary

The evaluation indicated that the scheme made a clear and positive contribution to improving drivers' day-to-day experiences of using lorry parks. There was strong evidence that the scheme's investment in facilities, parking and security noticeably enhanced the quality, availability and usability of provisions at lorry parks and positively impacted HGV drivers' perceptions and experiences. Improvements funded through the scheme contributed to improved driver welfare and supported retention, though wider factors such as pay and working conditions remain more influential. While the scheme's impact on recruitment and broader attitudes towards lorry parks could not yet be fully demonstrated, it was anticipated that associated outcomes and longer term impacts would require more time to materialise.

Glossary

Term	Full name/Description
ANPR	Automatic Number Plate Recognition
BPA	British Parking Association
CA	Contribution Analysis, a theory-based evaluation methodology
CCTV	Closed Circuit Television
CPC	Certificate of Professional Competence
DfT	Department for Transport
Independent Truck Stop	A roadside facility designed for long-haul drivers and not part of a national or regional chain
GDPR	General Data Protection Regulation
HGV	Heavy Goods Vehicle
Lorry park	A designated area where HGVs can park for short or extended periods. Designed to provide safe and secure parking, while also offering amenities and services for drivers ("rest areas"). For the purpose of the report, lorry park has been used to describe all sites, independent truck stops, MSAs, TRSAs and local authority truck stops.
MFGS	Match Funding Grant Scheme
MSA	Motorway Service Area. A road service area on the motorway network for all vehicles with a specific area for HGVs to park (including overnight parking).
NaVCIS	National Vehicle Crime Intelligence Service
RHA	Road Haulage Association
SNAP	SNAP: An intermediary for drivers/fleets to book parking spaces and use for payment at lorry parks (https://snapacc.com)
SRN	Strategic Road Network
ToC	Theory of Change
TRSA	Trunk Road Service Area: A road service area on the SRN other than a motorway.
VAT	Value Added Tax
Wi-Fi	Wireless Fidelity

2. Context and Approach

2.1 Introduction

This section provides a brief overview of the match funding grant scheme operated by the Department for Transport (DfT), including the timing of different funding windows. It also presents the aims and objectives of the scheme evaluation, covering both processes and impacts.

2.2 About the scheme

In November 2022, the DfT introduced the Heavy Goods Vehicle (HGV) Parking and Driver Welfare Match Funding Grant Scheme (MFGS). This report refers to the MFGS as ‘the scheme’ from this point. This report also uses the term ‘lorry parks’ to collectively refer to independent and local authority truck stops, motorway service areas (MSA) and trunk road service areas (TRSAs). Those organisations who successfully applied to the scheme are referred to as ‘operators’.

The scheme provided match funding to operators to support them in making improvements in one or more of the following areas:

- **Facilities** to support driver welfare, such as toilets and showers (including gender specific and disabled facilities), café and lounge/seating areas, truck wash and other adjustments to meet the accessibility needs of drivers with limited mobility.
- **Security** improvements, such as entrance gates, secure fencing, lighting, CCTV and monitoring equipment.
- **Parking** improvements to increase HGV parking capacity, either through reconfiguring the layout or extending the designated parking area. Parking area improvements could also include resurfacing to improve the quality of the area.
- **Decarbonisation** improvements such as electric HGV charging infrastructure, alternative fuel installation and solar energy.

Scheme grants could be used to fund:

- Capital expenditure required to complete the Improvement Project.
- Professional fees charged to the grant recipient by external advisers, including architecture, civil engineering, planning, ground surveys, mechanical engineering and electrical engineering.

Scheme grants could not be used for:

- Resource costs, such as normal running costs and general business overheads.
- Labour costs associated with regular workforce and security staff.
- Purchasing land, planning permission or to retrospectively pay for investment.

The scheme’s main objective was to improve the quality of lorry parks to contribute to the overall aim of improving HGV driver recruitment and retention rates. The scheme aimed to enable faster delivery of planned improvements and to incentivise operators to pursue improvements which may not otherwise have been financially viable.

There were three opportunities ('windows') for operators to apply for funding. Table 2.1 shows the dates for each window. This report summarises the process and impact evaluation for the first two windows, with window three being out of scope of the impact evaluation due to the timing of the data collection. All applications that met the scheme's criteria were approved for funding. The scheme was extended until March 2026 to allow more time for projects to be completed.

Table 2.1 DfT dates of funding windows

Window	Opening Date	Closing date	Date to complete improvement work
One	22 November 2022	24 February 2023	31 March 2024 (extended to 2025)
Two	11 September 2023	20 November 2023	31 March 2025
Three	7 May 2024	19 June 2024	31 March 2026

For window one, the scheme was open to operators of existing lorry parks with a minimum of three years trading history, to invest in capital improvement projects. Trading history requirements were reduced to two years after window one to make the scheme less restrictive for operators.

The DfT matched the funding of the proposed improvements by up to 50% of the investment cost, capped to a maximum match funding value of £315,000 per lorry park, per window.

Operators were allowed to apply for funding for the same lorry park in a different window, providing the application was for a different type of improvement. The criteria for applicants were:

- Lorry parks had to be located on or near the strategic road network in England.
- Improvements had to be on lorry parks which were situated on freehold land or land with a leasehold tenure of at least eight years.
- Operators needed to be a registered company or partnership at Companies House.
- Operators needed to be VAT registered with a current VAT registered number.

There were 70 successful applications across the first two funding windows, resulting in improvement works at 34 lorry parks in window one and 36 in window two. Of these, four lorry parks received funding in both windows, meaning 66 unique sites received funding in either window one or two. A list of successful applications for each window was provided on the gov.uk website: [round 1](#) and [round 2](#). The number of projects recorded was subject to change, as some projects could have been re-instated following review. Furthermore, as the scheme progressed throughout its lifecycle, additional adjustments occurred, such as projects being added, amended, paused or re-instated.

The [DfT National Survey of Lorry Parking 2022](#) recorded that there were 328 lorry parks in England in March 2022. Based on this, successful applicants for funding

represented 20% of lorry parks in England; noting that not all operators applied for funding.

The scheme ran at the same time as the National Highways Lorry Parking Facilities Improvements Scheme, which offered a similar match funding grant as the DfT.

Operators were not permitted to receive funding from both the DfT and National Highways for the same improvement project. More information about the National Highways facilities improvements scheme is available here: [national-highways-lorry-parking-facilities-improvements-scheme](#). The [Driving for Better Business website](#) lists 125 successful applicants to the National Highways scheme, equating to 38% of lorry parks in England. Most (82%) of the successful applicants to the National Highways scheme were MSAs. There were 28 lorry parks that successfully applied to both the DfT and National Highways, of which 24 were MSAs and 4 were independent operators. This was allowed under scheme rules if the investment was for different works; for example, one security improvement and one parking improvement.

2.3 Evaluation aims and objectives

The primary objective of the evaluation was to assess the contribution of the scheme to improving the quality of lorry parks in England, with a focus on:

- Whether the scheme had succeeded in contributing to improvements to facilities, parking and security at HGV lorry parks in England.
- The extent to which the scheme had replaced or complemented existing facilities, parking and security measures at lorry parks.
- The impact of investment in the recruitment and retention of HGV drivers.

Sub-objectives were agreed for each of the process and impact evaluation strands, as set out below.

2.3.1 Process Evaluation

The aim of the process evaluation was to understand how the scheme operated and to identify any barriers experienced by operators during the application process. The objectives of the process evaluation were to:

- Assess awareness and motivation to apply among operators.
- Identify any barriers that restricted or discouraged applications.
- Identify any differences in experience for MSAs and independent operators.
- Identify learnings from delivery that could inform future windows or similar schemes.

The specific evaluation questions for the funding process and implementation were as follows:

- To what extent did the MFGS complement existing lorry park improvement work, or encourage operators to deliver additional lorry park improvements?
- To what extent were the criteria for funding lorry park improvements appropriate to the needs of operators in delivering the intended improvements?
- What, if any, barriers restricted or discouraged operators from applying?

- To what extent did operators know about the fund and how motivated were they to apply for the MFGS?
- How did all the above vary by MSA and independent truck stops, if at all?
- What learnings are there from the delivery of the MFGS that could inform future iterations of the fund, or similar funds?

2.3.2 Impact Evaluation

The aim of the impact evaluation was to assess the extent to which the scheme delivered improvements to lorry parks in England in three areas:

- Facilities.
- Security.
- Parking.

The evaluation utilised a Contribution Analysis (CA) approach to consider the influence of the scheme on driver awareness/perception of improvements, the potential contribution of other factors and the potential impact on the recruitment and retention of HGV drivers more widely within the sector. The specific evaluation questions to assess the impact of the scheme were as follows:

- What, if any, improvements in HGV parking capacity have been delivered through the MFGS?
- What, if any, improvements in HGV driver facilities have been delivered through the MFGS?
- What effect, if any, do these improvements to driver facilities have on the welfare of drivers using the lorry park?
- What, if any, improvements in HGV driver and vehicle security have been delivered through the MFGS?
- How much, if at all, do HGV drivers using the lorry park feel safer because of these improvements?

3. Evaluation Design

3.1 Introduction

Assessing both the processes and impacts of the scheme required concurrent but distinct approaches, with proportionate data collection tailored to each. Both process and impact evaluation components were underpinned by a Theory of Change (ToC) to set out how the scheme's outputs were anticipated to contribute to specific outcomes, and ultimately to the intended impacts (ToC shown in Figure 3.2). This section provides a summary of the evaluation design and approach, the data collection undertaken and the limitations within the evaluation.

Process evaluation

The process evaluation was based on:

- **Qualitative interviews with 15 lorry park operators**, exploring their experiences of applying for the scheme and delivering improvement works, including perceived barriers.

Impact evaluation

The impact evaluation was underpinned by the following core elements:

- **Contribution Analysis** adopted to frame the data analysis and evaluation. This theory-based evaluation approach brought the different elements of the evaluation together to create a fuller understanding of the influence of the scheme and the influence of other, often external factors.
- **A total of 1,224 surveys and 20 in-depth qualitative interviews** with HGV drivers at lorry parks, to assess driver awareness of lorry park improvements and consider the impact of each improvement.
- **Five industry stakeholder interviews** with representatives from the freight haulage industry to obtain views of the scheme, how it was introduced and the perceived impact for drivers.

3.2 Contribution Analysis

Contribution Analysis (CA) principles were adopted as the main framework for this evaluation, with the six steps (Figure 3.1) being well matched to the requirements of the work.

Figure 3.1 Six steps of contribution analysis



A strength of adopting CA was that it immediately acknowledged the attribution challenge and sought to address this through the early development of a ToC (see Section 3.3). Whilst consideration was given to the application of quasi-experimental evaluation approaches, these were discounted, primarily due to the challenge of identifying robust comparison sites as independent lorry parks tend to vary in characteristics and design.

The key challenges to directly attributing change to the scheme included:

- Multiple investments often occurred at the same sites, making it difficult for drivers to identify which improvements were funded by the scheme.
- Survey questions on perceptions of and satisfaction with lorry park improvements could be influenced by external factors, such as journey length and type, recent journey experience or broader economic conditions.
- No baseline data was collected, so a before-and-after comparison was not possible. Driver surveys and in-depth interviews relied on participant recall.
- Some outcomes, such as reduced crime or increased retention, require longer timescales to materialise and were therefore likely to be outside the evaluation period.

The CA drew on all available evidence, including the driver survey, in-depth interviews with drivers and industry stakeholders and secondary datasets such as lorry parking audits. Each evidence source was assessed for strength and rated as either strong, moderate or weak (see section 6.1), which informed the confidence level assigned to each contribution claim (see **Appendix I** for a list of the claims).

For each contribution claim, the underlying mechanisms for anticipated change were identified. These are the mechanisms through which outcomes were anticipated to occur. For example, improvements in the number and quality of facilities was expected to influence HGV drivers' satisfaction.

Any underlying assumptions were also identified, for example that lorry park operators did not remove or reduce other facilities to enable scheme funded improvements to be made. This could have reduced the overall provision for drivers and negatively impacted on their satisfaction.

The contribution claims were tested using the available evidence and in the context of mechanisms and assumptions, leading into a conclusion on the confidence of whether the evidence supported the individual claim. Engagement with key DfT stakeholders enabled the evaluation team to test and confirm contribution claim conclusions.

3.3 Scheme Theory of Change

A robust ToC was developed for the scheme in consultation with the DfT, building on an initial ToC provided by the Department. This was completed during the evaluation inception phase and included a thorough review of the scheme documentation, including application forms, lessons learnt assessment and data on delivery progress/timelines for each lorry park. The ToC was used to define hypotheses to show how the scheme was anticipated to contribute to outcomes and subsequently how these would support longer term impacts (although these were outside the scope of the evaluation timing). Some of the desired impacts of the scheme, such as retention and recruitment of HGV drivers, were also likely to be influenced by multiple factors, some of which were outside the scope of the scheme, for example:

- Lone working arrangements for HGV drivers.
- Pay levels and general remuneration.
- Relationship with employer, duration of employment.

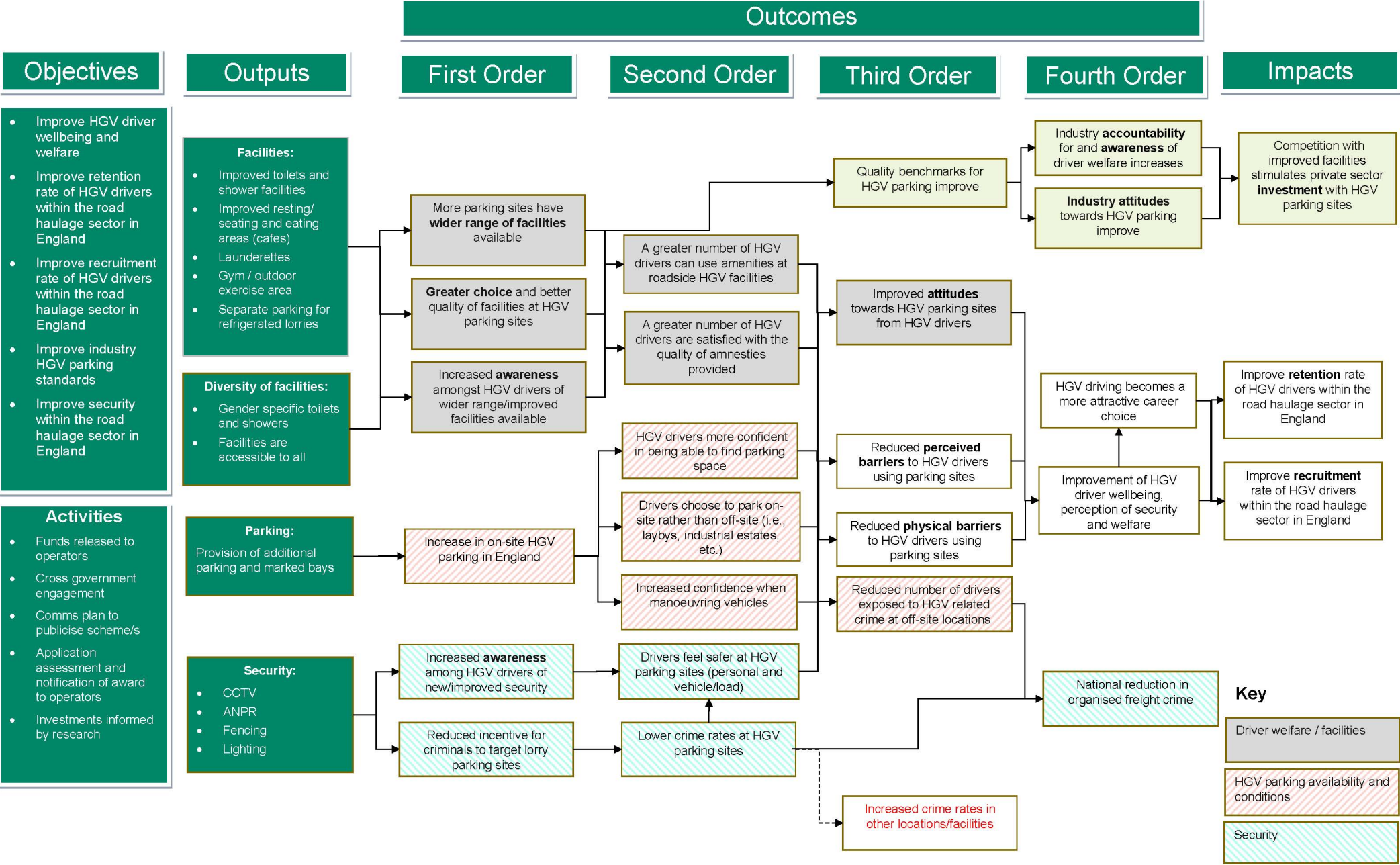
- Stress and perceptions of safety when driving.
- Unsociable nature of the job and overnight stays away from family and friends.
- Working hours.

Figure 3.2 shows the ToC for the scheme summarised using a logic map. The map works from left to right, working through the scheme objectives, outputs delivered and then phases (orders) of anticipated outcomes. Any potential disbenefits that could result from the scheme are shown in red font with dashed line connections. The connecting lines and arrows show the pathways of anticipated change. The map also shows outcomes categorised into driver facilities, parking and safety.

Some elements of the ToC were not within the scope of the evaluation. This was due to the constraints on data collection, including the number and complexity of questions that could be included within the survey of drivers. Outcomes that have no colour in the logic map (see Figure 3.2) were considered to be outside the remit of the evaluation.

The ToC does not show outcomes associated with decarbonisation-related funding, as the main benefit would be lorry parks being more economical, improve heating and ensuring hot water availability. The impact of decarbonisation for HGV drivers would be an improved hot water supply or heating and this could not be robustly assessed in the evaluation (see Section 3.5 – limitations of the scheme evaluation). A written summary of the ToC is provided in **Appendix A**.

Figure 3.2 Scheme Theory of Change Logic Map



3.4 Data collection

There were two phases of primary data collection for the evaluation.

Phase one:

- Process Evaluation: 11 in-depth interviews with lorry park operators that had applied for, and received, funding in either window one or two.
- Impact Evaluation: 612 surveys and 20 in-depth interviews with drivers at lorry parks that had completed works by May 2024.
- Fieldwork was completed between Monday 8 August and Thursday 12 September 2024.

Phase two:

- Process Evaluation: Four additional interviews (delayed from phase one due to operator availability). Operators who had applied in window three were included if they had also applied in either window one or two to collect any learnings from those who were completing applications for a second or third time.
- Impact Evaluation: 612 surveys with drivers at lorry parks that completed works after April 2024 and before May 2025 for window two.
- Fieldwork completed between Tuesday 7 May and Friday 11 July 2025.

3.4.1 Process evaluation sample and method

The 70 lorry parks that received funding across windows one and two were operated by 35 different organisations:

- 29 operators applied for and received funding for one lorry park each.
- Five operators of independent lorry parks applied for and received funding for more than one lorry park (14 lorry parks in total).
- One operator applied for and received funding for 27 different lorry parks (almost all of which were MSAs).

To ensure a diverse range of sites was included in the process evaluation in-depth interviews, a purposive sampling approach was used to select lorry parks (see **Appendix B** for details). Fifteen of the 35 different operators who were successful in their funding application were selected to complete an interview; this included the head office of one MSA operator. All interviews were conducted with an owner or manager directly responsible or heavily involved in either the application and/or delivery of the agreed works.

Interviews were approximately one hour in length and were conducted in August and September 2024 (phase one) and June and July 2025 (phase two). All but one of the interviews took place using MS Teams, with one interview completed face-to-face at the lorry park. All interviews were recorded with participant permission. Recordings and transcripts were used to support analysis. A discussion guide was designed in collaboration with the DfT (provided in **Appendix B**). A summary of the analysis approach is provided in **Appendix G**.

3.4.2 Impact evaluation sample and method

A combination of quantitative surveys and in-depth interviews were conducted with HGV drivers at lorry parks which had completed improvement works. In addition, five

in-depth interviews were undertaken with freight/haulage industry stakeholders to capture industry opinions and to provide a wider understanding of the outcomes observed.

Driver Surveys

A sample of 25 lorry parks participated in the impact evaluation surveys, representing approximately one-third of the successful applicants from funding windows one and two. Sites were selected using a convenience sampling approach, targeting a mix of lorry park types (independent and MSAs), improvement types and geographic coverage across different regions of England. The questionnaire, with phase two updates identified, is provided in **Appendix D**.

Drivers' in-depth interviews

Twenty in-depth interviews with HGV drivers were conducted, each lasting approximately 60 minutes. A purposive sampling approach was used to select four lorry parks, ensuring representation across each of the three scheme improvements areas (facilities, security and parking). One MSA was included to provide an indicative comparison between MSAs and independently owned lorry parks.

The driver discussion guide enabled moderators to explore topics covered in the survey in more depth (guide provided in **Appendix E**). At each of the four sites, five in-depth interviews were undertaken with a mix of HGV drivers. The interviews were recorded with permission and transcribed to aid analysis.

Industry in-depth interviews

To provide a more strategic view of the scheme and improvements made, five in-depth interviews, lasting 60 minutes, were completed with representatives of the following organisations:

- Chartered Institute of Logistics and Transport (CILT).
- Logistics UK.
- Mates in Mind.
- Road Haulage Association (RHA).
- Unite the Union.

Further information about these organisations is provided in **Appendix C**. The discussion guide for industry stakeholders broadly aligned with the process and HGV driver discussion guides (provided in **Appendix F**).

Figure 3.3 provides a summary of the data collection methods used for this evaluation, with further detail of approach included in **Appendix G**.

Figure 3.3 Methodology summary

Process evaluation	Impact evaluation	Impact evaluation	Impact evaluation
In-depth interviews (operators)	In-depth interviews (drivers)	Surveys (drivers)	In-depth interviews (industry)
- Interviews with those who were responsible for the application and delivery 60-minute interviews using MS Teams - Sites different in size and type of ownership	60-minute interviews at sites with HGV drivers - Four sites with the full range of improvements	10-minute survey with HGV drivers at sites 25 sites with the full range of improvements Quality assurance data verification: accompanied visits and re-contacts	- Interviews with industry stakeholders and driver welfare advocates 60-minute interviews using MS Teams
Sample size	Sample size	Sample size	Sample size
<u>2024</u>: 11 interviews conducted across windows one and two <u>2025</u>: Four interviews conducted across window two <u>Total</u>: 15 interviews	<u>2024</u>: 20 interviews conducted at sites from window one	<u>2024</u>: 612 surveys conducted in window one <u>2025</u>: 612 surveys conducted across window two <u>Total</u>: 1,224 surveys	<u>Total</u>: Five interviews - Three industry organisations - Two advocates of driver welfare
Analysis	Analysis	Analysis	Analysis
- Transcripts - Thematic analysis	- Transcripts - Thematic analysis	- Data cleaning, processing and validation - Statistical analysis and insight for the full sample and each type of intervention	- Transcripts - Thematic analysis

3.5 Limitations of the scheme evaluation

This section summarises the key methodological, data, operational and scope-related limitations that shaped the evaluation. These limitations do not invalidate the findings, but they do reduce the ability to draw causal inferences and limit the generalisability of results across all lorry parks in England. Findings should therefore be interpreted as indicative rather than representative.

3.5.1 Methodological Limitations

Lack of baseline data

There was no baseline survey undertaken before the improvement works began, meaning the evaluation could not employ objective before/after comparisons. This weakens causal attribution and increases uncertainty around the size and direction of change attributed to the scheme. Instead, the evaluation relied on retrospective recall, asking HGV drivers who had previously visited the lorry park to provide a retrospective rating as part of the driver survey. This meant that indications of scheme impact were only informed by these drivers. The robustness of the data was further impacted, as not all returning drivers had noticed the improvements, reducing the number who could meaningfully comment on the level of change experienced.

Risk of recall bias

There was an extended period of time, for both the process and impact evaluation, between when respondents experienced an event and when they were asked to reflect on it. The time periods between improvements and data collection were:

- **Impact evaluation:** A minimum of four to five months from works completed to surveys starting for 10 lorry parks in phase one and for 11 of the 15 lorry parks in phase two. In phase two, four lorry parks completed the improvement works in 2024, which meant respondents needed to compare the lorry park on the day with their experience from 12 months previously.
- **Process evaluation:** A maximum of an 18-month gap from application to in-depth interviews.

The longer the gap, the less accurately respondents tend to recall their experience, increasing the risk of recall bias. As HGV drivers may visit numerous lorry parks across the UK and Europe, the risk of misattribution or inaccurately recalling specific improvements was further heightened. Respondents may therefore have unintentionally overstated or understated the scheme's impact.

Risk of sample bias

Options for lorry park selection were restricted as some operators did not complete improvement works on time. This meant that all independent lorry parks which had completed improvements by the time of the driver surveys had to be included. As a result, a non-probability convenience sampling approach had to be used, introducing a risk of sample bias due to the inability to select lorry parks with a diverse range and number of improvements. Detail of how this applied in phase 1 and 2 is provided below:

- **Phase 1:** Data collection began in August 2024, four months after the deadline for work to be completed for window one. Only six independent lorry parks had completed work by the end of March 2024, which meant these had to be selected for data collection.

- **Phase 2:** Data collection began in May 2025. The number of lorry parks which had completed their works by March 2025 was low, which, like phase 1, meant all independent lorry parks available had to be selected for data collection. The alternative was to include more MSAs which would have skewed the data further.

Limitations in Representativeness and Precision of Survey Findings

As the driver survey used a non-probability sampling design, results cannot be treated as statistically representative of all HGV drivers. The survey can reliably identify only larger differences between subgroups, and small variations should not be over-interpreted. Subgroup analysis was conducted by age, years' experience and type of intervention, which confirmed that there was very little difference in response for most questions in the driver survey.

Because participation was voluntary, respondents may systematically differ from non-participants. While the survey interviewers approached all drivers on site and offered the survey in five languages to maximise inclusivity, the representativeness of the final sample cannot be assured. The findings should therefore be interpreted as indicative of participating drivers rather than the wider HGV driver population.

Limited external validity of in-depth interviews (process and impact)

The qualitative in-depth interviews with drivers and industry stakeholders added value by providing a deeper and broader understanding to the findings of the quantitative driver survey. Findings provided explanatory depth but should not be generalised to all operators or drivers.

Limitations in Isolating the Scheme's Contribution

It was not possible to isolate the specific contribution of the scheme to the outcomes observed. Local site-management practices, pre-existing conditions and wider market factors such as inflation, labour shortages, freight-crime trends and maintenance standards, may also have influenced driver perceptions and site quality. As a result, observed changes cannot be attributed solely to the scheme.

3.5.2 Operational constraints

Restrictions During Election Periods

Fieldwork and engagement activities were constrained by the pre-general-election period of sensitivity (23 May–4 July 2024) and the local elections on 1 May 2025. These periods restricted communication with operators, halted fieldwork and limited opportunities to engage industry stakeholders, slowing down evaluation activities. These constraints widened the recall window for respondents and increased the influence of external events, further limiting the ability to identify clear causal links between scheme funding and reported outcomes.

Variation in Site Readiness

Some operators did not complete improvement works on time. As a result, all independent lorry parks that had completed improvements by the start of data collection had to be included, leading to a convenience sample in both phases. This constrained the diversity of the evaluation sample by operator type, size and intervention profile.

Operators investing more than the DfT

Twelve lorry parks had investments of £1,000,000 or more. The DfT provided match funding up to the maximum of £315,000. As a result, these lorry parks benefited from

improvements beyond those directly supported by the scheme. These additional investments likely contributed to driver satisfaction. It was therefore not always possible to isolate the contribution of the scheme from additional investments.

Limited Access to Non-Applicants

GDPR restrictions prevented evaluators from contacting operators who did not apply for funding or whose applications were unsuccessful. As a result, the process evaluation did not explore why operators chose not to apply for funding or complete the application process or levels of unmet need, restricting insights to those who participated in at least one scheme window. This limited the representativeness of findings as the views and experiences of these groups, who may have faced different barriers or had lower awareness of the scheme, have not been captured. As a result, insights were limited to understanding why some window two applicants had not applied during window one, as well as why window one applicants had not applied for window two.

3.5.3 Scope limitations

Limited ability to assess long-term impacts

The evaluation activities were undertaken between one month and one year after works were completed, which meant it was too early to evaluate potential longer-term impacts such as:

- **Upkeep and maintenance:** Durability of improvement works and standard of their future maintenance remains unknown. Time is needed before this can be evaluated to determine whether the longer-term outcomes in the ToC have been achieved. Additionally, as improved facilities become normalised, their perceived impact may diminish over time.
- **Recruitment and retention:** Additional time is required before sufficient evidence becomes available to evaluate whether driver turnover is decreasing and applications for HGV driver roles are increasing.
- **Freight crime:** Reductions in crime are unlikely to be observable within a 12-month window. More time is required before evidence becomes available, either through lorry park operators reporting fewer incidents or through national statistics.

4. Process Evaluation Findings

4.1 Introduction

This section presents findings of the scheme application and implementation processes as experienced by operators. The process evaluation included 15 in-depth interviews with operators, covering both independent lorry parks and an MSA operator. To minimise reader burden, these are collectively described as ‘operators’; the exception to this is where the evaluation refers to ‘applicants’ to any future window of funding. It is important to note that this strand of the research used a qualitative methodology. As such, the views expressed may reflect the perspectives of individual or multiple operators and should not be interpreted as representing a consensus across all lorry park operators. Findings from industry stakeholders are also incorporated, where relevant, to provide broader context, and these are presented in green boxes.

4.2 Awareness, motivation for applying, eligibility including barriers

Operators became aware of the scheme through a range of sources and channels. Email or direct engagement from the DfT was the most mentioned source of awareness. It is worth noting that some operators indicated that they did not receive emails because they were not subscribed to the relevant mailing list(s), their contact details were out of date or incorrect, or firewalls redirected messages to spam or junk folders. Operators could not always recall all the sources, but key sources identified included:

- Industry media and press (e.g. magazines, newsletters).
- Emails from the RHA.

Sources less widely used included:

- General word of mouth (e.g. drivers, other operators).
- Other online forums/groups.
- Call from SNAP (an intermediary for drivers or fleet managers to book parking spaces).
- Communications through NaVCIS.
- Communications through the Petrol Retailers Association.
- Looking at the [dft.gov.uk](https://www.dft.gov.uk) website.
- Communications with local Highways Manager.
- Communications with local MP.

Independent operators, often those with one lorry park, were typically time constrained, making it more challenging for them to find the time to engage with and learn about funding opportunities of this nature. Operators with available resource monitored the GOV.UK website. Those with less resource reported that the use of multiple communication channels to promote the scheme was useful.

Because not all operators were initially familiar with the scheme, a multi-channel approach helped to build confidence in the scheme’s legitimacy across all operator

types. Hearing about the fund from different sources such as trade press and social media, including reminders of the approaching deadline, provided the final impetus for some operators to submit their application.

4.2.1 Timing of operator awareness and multiple windows

Operators did not always become aware of the scheme immediately after communications were issued and the length of this awareness lag varied:

- A minority of operators only became aware of the scheme close to the application closing deadline, which meant they had limited time to fully consider the opportunity and complete the application.
- Some operators were not aware that there was more than one application window.
- Several operators who had only applied for window two said they would have also applied in windows one or three, but they had not known those windows existed. Some operators became aware of window two through industry bodies and media sources, and others via emails from the DfT.

“It was the RHA who told us about the scheme, and we didn’t know until the second round.... I think it’s about making it known to small companies like ourselves.”

One operator expressed a missed opportunity to apply during window one and would have applied in other windows, had they known about them.

“It’s quite disappointing that we weren’t told. They knew we were here... They could have reached out... the funding could have helped us possibly get [other improvements] in place quicker.”

Industry stakeholder views

- Industry stakeholders felt the DfT should have used both direct and indirect channels to raise awareness and promote the scheme, using official announcements, press releases, social media, emails, letters, face-to-face engagements and having the word spread through industry bodies and organisations.
- Engaging with smaller operators was perceived as a challenge due to their more limited resources and likely frequency/channels of communications with the DfT.

4.2.2 Possible reasons operators did not apply for DfT funding

Operators reported that there was confusion between the DfT’s scheme and the funding provided by National Highways. Some operators reported that they were unaware that these were two different opportunities.

Data on the total number of lorry parks in England from the National Survey of Lorry Parking 2022, indicated that 79% of lorry parks did not receive DfT funding. Levels of awareness of the scheme amongst those who did not apply is unknown, as non-applicants could not be included within the process evaluation.

“I know some [operators] who didn’t apply but now wish they had applied...but they were asking me about the process and feel like they’ve missed out.”

4.2.3 Motivation for applying for the funding

There was a consensus from all operators that the scheme represented a great opportunity to improve their lorry park(s). Four main factors motivated operators to apply for funding:

- **The desire to improve driver welfare and satisfaction:** Driver welfare was a high priority for many operators; they expressed a sense of responsibility for the well-being of drivers. Some noted that typically, small profit margins in the industry limited investment in relatively minor improvements, thereby constraining efforts to enhance driver welfare and satisfaction. Positively, some operators stated that the funding helped them to substantially progress existing formal or informal strategies for improvement that might otherwise have been aspirational.
- **Address a perceived shortfall in local secure parking capacity or gaps in parking security:** Operators widely felt the fund provided an opportunity to address a shortfall in secure overnight parking. Some operators listened to driver feedback about security concerns, which motivated them to invest in this area. Other operators had worked with local police to consider security risks, particularly in the South-East of England and near busy entry points for freight traffic.
- **The opportunity to be more ambitious and accelerate existing plans:** An aim of the scheme was to enable faster delivery of planned improvements. A few operators discussed how they had opted to bring forward their plans and made upgrades to their lorry park sooner than they felt was needed. One operator took the opportunity to achieve their plans in two to three years from what was, before the scheme, a 10-year plan.

“It's brought our 10-year plan forward by about eight years, and it's improved our site dramatically. To be quite honest, I wouldn't have been able to do so well and do what I have done so far without the help and support of the Department for Transport and grant funding.”

- **Building a business case for approval:** It was often difficult for operators to justify improvements which might not generate a measurable monetary return. Operators generally needed to provide evidence of the potential and actual success of improvements to justify internal funding. Operators felt that the scheme had simplified the business case process and improved their chances of gaining approval for funding the other 50% of the works.

4.2.4 Barriers to applying for the funding

While most operators interviewed described the decision to apply as being straightforward, some faced barriers including:

- **Late awareness of the scheme:** For some operators, late awareness of the scheme reduced the amount of time available to collate the required information. Late awareness also made the deadline to apply challenging and meant applications had to be drafted under time pressure.
- **Resource availability:** Most independent operators reported that funding applications fell within the remit of senior staff who had a broad range of responsibilities. Some independent operators, especially owners operating a

single lorry park, thought larger operators had the advantage of employees with time to seek out, plan and apply for funding.

- **Capability and uncertainty:** A few operators felt “daunted” by the application process and the amount of supporting information they had to provide in connection with their application. An operator, who was applying for a small amount of funding, described the information required as “overkill” and felt they spent a disproportionate amount of time on their application. Some independent operators were also unsure how to write an explanation of their plans and reasons why these would improve their lorry park for drivers.

“When you get the application, there are fifty-plus pages to read, and I’m a layman, so I was thinking goodness me, what am I signing for?”

- **Uncertainties over the ability to match the funding:** Independent operators typically felt the match funding arrangement posed a financial risk to them. These risks were linked to the time between applying and completing the works and their expectation for the cost of raw materials and labour to increase. In addition, some operators felt it was initially unclear how and when the funding would be provided; whether up front, in instalments during delivery, or on completion.
- **Scheme authenticity:** General scepticism, and concerns about whether the emails received were genuine or phishing, led some operators to initially doubt the authenticity of the scheme. These initial concerns led to delays in operators starting the application process, thereby reducing the time available to apply. As noted earlier, the more the operators heard of the funding from other sources, the more confidence and trust they had.
- **Impact of delivery deadline:** It was felt that tight completion delivery deadlines could be a barrier for some operators, particularly for larger projects, where more planning was required. There were concerns about unforeseen issues that could potentially delay improvement works, such as time required to obtain planning permission. Some operators were unsure how much, if any, flexibility the DfT would offer in the event of delays. None of the operators referred to the 12-month extension that could be made available should operators encounter issues with planning permission; however, this does not necessarily reflect their awareness of this potential extension as operators were not prompted on this matter.
- **Difficulty finding information about the scheme:** A few operators, who described themselves as less technically proficient, struggled to find the information they needed on the DfT website. Operators indicated that better signposting to relevant webpages and support information would have helped to mitigate this.

Industry stakeholder views

- Stakeholders felt that a perceived barrier for some potential applicants (particularly smaller operators) was having the financial resources to commit in the first place to receive match funding.
- The completion date of the end of March each year was believed to be a barrier for some operators in terms of being able to deliver works in time.

4.3 Application process

4.3.1 Criteria for applying

Operators were largely supportive of the eligibility criteria for the scheme and felt they were clear and appropriate. They also felt the range of permitted improvements reflected the needs of drivers. The main aspects discussed by operators were:

- **Types of improvements in scope for funding:** All operators described how they were pleased they were able to make improvements within the broad categories of facilities, security, parking and decarbonisation. They preferred this flexibility over a more prescriptive approach. A few operators commented specifically about supporting gyms and laundrettes in the future as these were also considered to be of benefit to driver welfare.
- **Greater guidance:** Examples showing before and after improvements, whether real or mocked up, would have helped a few operators envisage what was achievable for their lorry park.
- **Provision for the development of new land:** Some operators would have liked the range of permitted improvements extended to the development of new land. It was felt this would enable them to address local shortages in secure parking. Challenges associated with development of new land, such as longer timescales to complete works, were acknowledged by operators.
- **Operators' response to funding decarbonisation:** A few operators welcomed the ability to apply for decarbonisation improvements. Examples of these were for solar panels, battery storage, Light-Emitting Diode (LED) lighting and refrigeration units. However, operators mostly felt that there was a risk in investing in what they viewed as relatively expensive and unproven technology such as electric vehicle charging. Independent operators who owned one or a few lorry parks felt operators with a chain of lorry parks would be more likely to make this investment due to their greater financial resources and resilience to risk. This was not raised by operators with larger portfolios of lorry parks.
- **Exclusive use for HGV drivers:** Some operators offered their facilities to members of the public as well as HGV drivers, for example, cafés open to all. These types of operators felt it was a challenge to meet the requirement to fund facilities exclusively used by HGV drivers. However, this concern reflected a misconception about Scheme eligibility, as the funding requirements did not exclude facilities that serve both HGV drivers and the general public.

Industry stakeholder views

- All stakeholders understood the chosen approach for the scheme and considered it to be reasonable as public money was being used for the funding.
- A few felt the DfT should have supported the creation and development of new lorry parks rather than solely being focused on improving existing ones.
- Stakeholders approved the scheme's broad scope and the flexibility it allowed in how it could be applied.
- All stakeholders felt drivers were unlikely to see or realise any direct benefit from decarbonisation, and felt facilities, security and parking should be prioritised.

4.3.2 Application aspects that would have benefited from clarification

Operators noted that greater clarity would have been helpful in the following two areas:

- **Availability of payment options and payment timescales:** Independent operators felt that the information on how they would receive payment lacked detail. Examples of the detail operators wanted to see was whether the lorry park would be eligible for payment upfront or if they could request instalments. A few believed payment options depended on the turnover of the lorry park and/or operator. It was felt clarity would assist them to plan better and manage their risk.
- **Business information:** Some operators' business was broader than lorry parks. These operators were unclear whether information included in their application, for example, annual turnover information, should be restricted to their lorry park operations or cover their wider operations.

4.3.3 Supporting information and information requirements

Most operators, particularly those who had experienced other funding applications, felt that the application form, requirements and questions were clear and concise. The supporting information provided was also felt to be clear and well laid out. Operators welcomed the ability to save their application and return later to complete. However, some experienced technical issues with the website.

4.3.4 Operators' suggestions for development of the application form

Operators provided the following suggestions to improve the scheme application form:

- **Level of detail required:** While this was considered appropriate for projects already in development, providing costs was considered challenging for projects in the early stages. Some operators felt that providing an option for an agreement in principle (with detailed works, costs and funding amounts approved later) would be more suitable for early-stage projects and could encourage more applications.
- **Streamlining the process for repeat applicants or multiple interventions:** A few operators felt parts of the application form and process were repetitive. Those applying for more than one lorry park or more than one window were required to re-enter information such as bank details and company/lorry park information. They felt an ability to build upon a previous application, or use it as a template, would have made subsequent applications much easier. A portal for applications and supporting documents rather than sending email attachments was suggested as an easier approach.
- **Question repetition:** A few operators noted a level of repetition, particularly regarding the project's rationale and an explanation of how each intervention will benefit HGV drivers.
- **Funding for small projects:** Those applying for relatively small amounts of funding (e.g. less than £15,000) felt that a lot of information was required relative to the value of the funding. A few operators noted that the application process was the same for all organisations. These operators suggested it would be more appropriate to tailor application requirements according to the size of projects and amount of funding being requested.

“For a job of our size, it was a lot of messing about for little money. If you’re talking hundreds of thousands of pounds, then it might be appropriate, but we’re not in our case.”

- **Funding for large projects:** Applications for projects which required the maximum match fund value of £315,000 also reported challenges. The main challenge mentioned was the need to break down all components, costs and timescales associated with a large project. Operators highlighted that any unforeseen or unaccounted issues could have a significant impact on costs and timings.

“I found it difficult answering some of the questions and giving the information needed for this major project, particularly the costings... For a major project like ours, getting two or three quotes for everything can be difficult... For the project management side of it, there is going to be a lot of overheads that we had to divide back through the costings. I’ve also found timelines difficult, because planning can often take longer than it is supposed to, and there is a lot to do.”

4.3.5 Application timescales

Operators were largely content with the timing of the funding opportunities. While relatively minor in impact, operators felt that addressing the following challenges could improve the response to future funding windows:

- **Submission timelines were short, unless operators were aware of the funding from the very beginning:** As described above, the ability to meet the application deadline was reduced if awareness was delayed or if the project was very large. Many operators suggested extending the window during which applications could be received and to raise awareness about the scheme and upcoming funding windows in advance of their launch. Doing so would assist operators to better manage their resource.
- **Time taken to approve funding and negotiate contracts was felt to be too long:** Some operators said it took at least two months for their application to be approved and a further two or three months to sign contracts. Quotations from contractors were typically valid for up to three months. The length of time required to approve applications and sign contracts increased the risk of cost escalation for the operator as the funding value was fixed. Operators could not formally book a contractor until funding was confirmed, and as time progressed there was a risk of the preferred contractor being unavailable. Operators had to consider delaying planned works, commissioning a different contractor or risk starting the works in the hope that funding would be confirmed.

“I could tell that it was taking a while to get the funding approved, but we already had contractors in place... We did consider [delaying when the improvement works would start], but the building contractor we picked had a window to do the works in, and I didn’t want to put them off until we had got the funding in place, because if we’d put them off, they might have moved on to another job...[meaning we’d] have to wait up to a year, and I didn’t want to get put to the bottom of the pile again... So we couldn’t claim funding on the costs before we got the [DfT] contract, the funding can only be applied to any invoices you’ve received after the date of the contract.”

- **Not enough clarity around timescales for confirming the outcome of applications:** This was considered important to enable operators to plan the start of works and manage delivery risks. Clarity on timescales following funding approval would have supported operators in planning activities. One operator noted that drivers started asking about progress once successful applications had been announced on the gov.uk website and that the drivers spread the news through word of mouth, which increased pressure to deliver improvements.
- **Window two was launched during the summer holidays:** Some operators reported that fewer staff were available during school holidays with more annual leave being taken. This limited their ability to respond to the application and/or added pressure to those who were not on leave.

4.3.6 Communication with the DfT during the application process

There were mixed views from operators regarding communication with the DfT before and after submitting their applications. Support was available via an email address on the application form, but some found this impersonal. The following summarises the points raised by operators:

- **Operators' mixed experience:** While some felt the levels of communication and support were good, others reported long response times. Some operators were unaware that support was available before submitting their application.
- **Direct contact:** Independent operators, particularly those who only owned one lorry park, had anticipated direct contact from the DfT and noted its absence as a weakness.
- **Previous and existing communication channels:** There was a perception that having an existing contact at the DfT, prior to the scheme, helped establish effective communication for some operators.
- **Application receipt and next steps:** Many operators noted they did not get confirmation that their application had been received, and there was a general lack of clarity around next steps. An automated response confirming receipt and a copy of the submitted application would have been beneficial.
- **Seeking updates:** A few operators felt they needed to "chase" for updates following their submission. They reported their reluctance to do so due to concerns over the appropriateness of chasing the DfT.
- **In-person interactions:** Those who commented about DfT staff visiting the lorry park for in-person meetings reported positive experiences and described them as competent, efficient, friendly and helpful.

Other communication suggestions related to the broader scheme proposed by operators for DfT consideration included:

- **Setting up a forum for sharing knowledge and best practice within the industry:** Suggestions included workshops to showcase successful improvements and their benefits to lorry parks and drivers. This could also provide a forum for raising awareness of funding opportunities.
- **Direct engagement with operators and drivers:** Operators felt that greater engagement with drivers was necessary to understand their concerns, issues affecting the industry and potential suggestions to make improvements, as well as generally build trust and communication.

4.4 Contract and agreement

Once the application had been approved, the process of agreeing the contract between the operator and the DfT began. The operators raised the following points about the contract and the process of reaching an agreement:

- **Contractual terms:** Operators were largely content with the contractual terms offered. Some perceived the contracting terms to be onerous, particularly for smaller projects.
- **Negotiating agreement:** It was acknowledged that discussions associated with contract terms were as expected. A few operators reported that the length of the contract and challenges around the terms contributed to delays in finalising agreements. Some terms were considered disproportionate to the nature of the improvements or introduced unsustainable levels of risks for operators. Examples included the length of time records had to be kept and a clause enabling either party to cancel at one month's notice. One month's notice was considered high-risk for operators as commitments had to be made to contractors.
- **Payment terms:** Payments were generally received within weeks of agreed milestones and a smooth process was experienced when operators agreed the same terms with contractors. Options to be paid as a lump sum or in instalments were available, and both options were used. The contractual payment terms included a requirement to pay within 60 days, and operators generally reported no issues with this, although some felt exposed as their cash flow varied.
- **Ability to choose payment in instalments:** Some of the independent operators benefitted from instalments as they did not feel they could afford to pay contractors in advance of receiving funds. This depended on the ability to negotiate the same payment terms with contractors. Operators who felt more exposed financially thought that the DfT could provide funding upfront and that this would have improved scheme uptake; they acknowledged this would be higher risk to the DfT.
- **Flexibility to amend proposals:** Flexibility to amend the improvements delivered, within the terms of the funding, was considered an important strength by operators. A small number of operators commented positively that they were able to amend the type of improvements in line with their business strategy.

4.5 Delivery

Operators highlighted challenges associated with delivering improvement works:

- **Erosion of delivery timescales:** Delivery timelines were determined by the need to complete work by the end of March of each financial year, as stated in the application process. As previously noted, many operators indicated that it took around two months for their application to be approved and a further two-to-three months to sign contracts. The time required for agreeing contracts further reduced the time available to deliver the improvement works. In some cases, the delays meant works needed to take place in the winter when adverse weather conditions posed additional risks. Mitigation measures included close working with contractors and proactive monitoring of works, or extra hours and weekend work. However, for some projects, lengthy decision making resulted in delays.

- **Managing cost escalation:** Most operators highlighted that the total cost of their improvement works exceeded original forecasts. The differences were due to inflation, price fluctuations of raw materials and the impact of delays on the validity of the original quotes. Operators would have liked more support to manage the risk of increased costs where this was outside their control.
- **Uncertainties around planning permission:** Obtaining necessary planning approvals impacted delivery, even when the application for planning permission was made before submitting the funding application.

“Eight weeks is the time it's supposed to take to get planning permission, and we applied for it before we applied for the scheme, but it has actually taken eight months which can quite often happen. Then, you have to discharge conditions which can be difficult, and there can be more problems along the way, so timescales are really tight for us.”

Operators generally agreed that monitoring and reporting requirements during delivery were straightforward. However, those with smaller projects felt that reporting at 50% and 100% completion would have been more appropriate than at the 25% intervals required.

Monitoring requirements were largely limited to the provision of photographic evidence and invoices as work was being completed. Where improvements were more extensive, regular progress calls with the DfT provided additional reassurance. The only suggested improvement to the payment system was the introduction of a reference, to ensure that payments could be matched when more than one lorry park owned by the same operator had been funded. This would also support where more than one improvement had been funded at the same lorry park in different windows.

4.6 Process evaluation summary

Using the above evidence from the 15 lorry park operators, this section considers each of the evaluation questions set out in Section 2.2. All conclusions drawn need to be considered in respect of the limitation of the recall gap which was described in Section 3.5 and the relatively small number of operators interviewed.

a) To what extent did the MFGS complement existing lorry park improvement work, or encourage operators to deliver additional lorry park improvements?

Most operators felt that the scheme enabled them to accelerate or enhance existing plans to improve facilities. In a minority of cases, operators updated facilities that did not yet need replacing as they wanted to capitalise on the funding opportunity.

b) To what extent were the criteria for funding lorry park improvements appropriate to the needs of operators in delivering the intended improvements?

The funding criteria were mostly seen as appropriate and the types of improvements which were eligible aligned with operators' identified needs, enabling them to carry out the required improvements (see Section 2.1 for funding criteria). Some operators suggested that increasing parking capacity might not be viable because of the match funding criteria (e.g. cap on funding available) or time constraints for delivery, so they chose not to explore it further and would not be

able to do so in the future under these constraints. A widely held operator view was that decarbonisation had a lower and less tangible benefit to drivers, compared to parking, security and facilities.

c) What, if any, barriers restricted or discouraged operators from applying?

The timing, window duration and availability of resources to complete applications were the main barriers noted by operators. Operators became aware of the scheme at different points in time. Those who were aware immediately, and had the resources, were able to prepare and submit their applications in a timely manner. Those not immediately aware of the scheme were encouraged by the DfT to apply. Some independent operators noted that they did not have prior experience of applying for funds, which whilst not a barrier, made the process more challenging. To note, it was not possible to interview operators who had decided not to apply, therefore evidence is provided by operators who did apply.

Time taken to approve funding and negotiate contracts was felt by nearly all to be too long. In some cases, complex projects such as parking extensions were not taken forward by operators due to the deadline of completing work by the following March.

d) To what extent did operators or lorry parking facilities know about the scheme and how motivated were they to apply for it?

The scheme was welcomed by all as a great opportunity to improve driver welfare and security, address shortfalls in parking provision and in some cases work towards more sustainable operations.

Despite the fund being communicated through a broad range of channels, awareness of the funding windows was inconsistent. The application process was considered straightforward, and the information was clear and well set out. Forms could have been streamlined particularly for repeat applications.

e) How does this vary by different types of lorry park?

Resource availability to complete an application was a greater barrier for independent operators than for large operators. Most independent operators were concerned with the resource available for them to identify and apply for funding opportunities generally. They faced greater uncertainty about the ability to match fund and had limited ability to absorb financial risk.

Some operators indicated that upfront information on payment options would be beneficial. The delay between application submission and contract approval exposed operators, particularly independent ones, to the risk of cost escalation. Delays also substantially reduced the time available to deliver improvements. Due to contract delays, one operator started work without a signed agreement, accepting the risk, rather than delay the project and the potential loss of their preferred contractor.

5. Primary Research Findings

5.1 Introduction

This section presents the results from the HGV driver survey and from in-depth interviews with drivers and industry stakeholders. The section explores drivers' awareness of the scheme, alongside their satisfaction with the key investment areas of facilities, parking and safety. The following data collection activities were undertaken as part of the impact evaluation:

- A total of 1,224 HGV drivers completed a 10-minute survey (612 surveys were completed in each of the two phases as explained in Section 3).
- Twenty in-depth interviews were completed with a cross section of HGV drivers to explore the themes covered in the survey in greater detail.
- Five in-depth interviews were completed with industry stakeholders and provided valuable context to complement the data collected from drivers.

The data presented in this section forms the main evidence base for assessing the contribution of the scheme, which is presented in Section 6.

The type of improvement each lorry park made, along with the profile of the drivers who responded, is provided in **Appendix G**. The data tables for the driver survey questions are provided in **Appendix H**. Drivers were only asked about improvement works at the site at which they were surveyed. As a result, the number of survey responses for each type of improvement were:

- **Facilities:** 927 surveys, including 343 conducted at lorry parks which made changes to both the toilet/shower block and the café/lounge/seating area.
- **Security:** 387 surveys, including 221 conducted at lorry parks that had at least three of the four security improvements (CCTV, lighting, fencing or security gates/ANPR).
- **Parking:** 735 surveys, including 247 conducted at lorry parks that had both parking surface and signage (parking bay) improvements.

Some questions were only asked to drivers who had visited the lorry park within specified pre and post improvement timeframes. As a result, base sizes vary for individual questions. More detail about the analysis of the survey data and in-depth interviews is provided in **Appendix G**.

5.2 Awareness of improvements

- Drivers who had visited the lorry park with completed improvements in the last year (1,057) were asked whether they had noticed any changes at the lorry park at which they were surveyed. Overall, 81% of respondents were aware of some form of change, specifically, 66% of 639 respondents noticed improvements to the toilet and/or showers.
- 70% of 448 respondents noticed improvements to the café and/or lounge/seating area.
- 67% of 638 respondents noticed parking improvements.
- 53% of 315 respondents noticed security improvements.

The survey results showed relatively consistent levels of awareness for toilets/showers, café/lounge/seating and parking, and lower levels of awareness of security improvements. The lower awareness levels of security improvements could be explained by the type of improvements made, which would be less visible to drivers, such as CCTV and lighting. Security improvements, particularly lighting, may not have been noticed because:

- Surveys were conducted between 2pm and 8pm in British Summer Time, when extended daylight hours meant lights were less likely to be switched on.
- Lighting improvements included changes to more energy efficient or brighter lights, which would have been less noticeable to drivers, especially given the recall gap explained in Section 3.5.

Evidence from the in-depth interviews with HGV drivers indicated that they had become aware of the improvements once works had started or after they were completed. Word of mouth between HGV drivers was often the initial point of awareness. This was then reinforced when drivers saw the changes being made at the lorry park.

5.3 Facilities

Forty-six of the 70 lorry parks receiving investment implemented improvements in facilities; toilets, showers, cafes and/or lounge/seating areas. Of the 25 lorry parks surveyed, 19 had made improvements to at least one aspect of their facilities. Improvements in these areas were highlighted in the ToC as important precursors to enhancing the general welfare of HGV drivers using lorry parks and the overall quality of their stay.

5.3.1 Toilets

Forty-one lorry parks made improvements in toilets, including 16 of the 25 surveyed. Four hundred and twenty drivers responding to the survey were aware of the improvements to toilets. These respondents were then asked to rate different aspects of the toilet facilities including the number of toilets, their freshness and safety. The majority of respondents rated toilet facilities as having improved ‘a lot’ or ‘a little’:

- 85% of 376 respondents for the number of toilets (67% a lot and 18% a little).
- 93% of 370 respondents for the freshness (72% a lot and 21% a little).
- 81% of 364 respondents for feeling safer when using facilities (65% improved a lot and 16% a little).

This evidence indicated a positive change in both the availability and quality of toilet facilities for HGV drivers. In-depth interviews with drivers highlighted that toilet improvements contributed to drivers feeling more valued. However, the standard of maintenance and cleanliness of toilets was an issue, specific to each lorry park.

“The toilets here are being always cleaned. It’s usually a disgusting problem at sites, and it really comes down to who is looking after those facilities and the place itself... These improvements make you feel good as a driver, because these things are done for you, for the drivers. It makes you feel like there’s someone who cares about how we feel.”

5.3.2 Showers

Forty-two lorry parks made improvements to showers, including 17 of the 25 surveyed. Three hundred and eighty drivers responding to the survey were aware of the improvements to showers. These respondents were then asked to rate different aspects of shower facilities. Amongst respondents who were aware and used the showers, there was again a consensus that the availability and quality had improved a little or a lot:

- 86% of 319 respondents reported the quality of showers had improved (69% a lot and 17% a little).
- 79% of 341 respondents reported the number of showers available had improved (63% a lot and 16% a little).
- 88% of 107 respondents reported the water pressure had improved (80% a lot and 8% a little).
- 87% of 107 respondents reported the water temperature had improved (82% a lot and 5% a little).

It should be noted that fewer drivers responded to the questions about water pressure and temperature as these improvement options were only included in the phase 2 survey.

Findings from the in-depth interviews with drivers showed that many felt MSAs tended to have a uniform layout and appearance, which made it harder to notice changes. A well-received change at one MSA was relocating the shower access point, allowing drivers to avoid walking through or waiting in the toilet area.

“There are more showers now, and they aren’t actually inside the toilets. You used to have to walk through the toilets to get to the shower cubicles, and you would sometimes have to queue with other drivers next to the toilets while waiting to use the shower. It wasn’t ideal.”

5.3.3 Café and lounge/seating area

Twelve lorry parks had made improvements to their café, including 7 that were surveyed, and 23 lorry parks had made improvements to lounge/seating areas including 10 that were surveyed. Overall, 448 HGV drivers participating in the survey visited a lorry site with café and lounge improvements. Of these, 70% (314) were aware of improvements and rated them. Overall, 95% of HGV drivers stated that café and lounge/seating areas had improved (84% a lot and 11% a little). Among those who had used these facilities, most felt that the quality had improved. However, because only a small number of lorry parks had made such improvements, the extent to which these findings can be generalised is limited.

Respondents who were aware of café and lounge/seating area changes were asked the extent to which they agreed or disagreed with different aspects of the facilities:

- 99% of 139 respondents agreed that the lounge/seating area was now more comfortable (70% strongly agreed, 29% agreed).
- 89% of 105 respondents agreed that the quality of food had improved (59% strongly agreed and 30% agreed).
- 89% of 104 respondents agreed that the choice of food had improved (58% strongly agreed and 31% agreed).

In the in-depth interviews, drivers described how the updated café or lounge/seating spaces felt more inviting and welcoming. There was a mix of drivers who enjoyed the communal areas and those who preferred to return to their vehicles. Those who returned to their vehicles after buying food, also commented on the benefit of walking into a clean, modern space.

“The lounge looks very presentable and very nice. [Before], it looked like a hospital ward.... Drivers are often not happy and complain there are not enough facilities and that nobody cares, but this shows that someone actually made an effort to make us feel a bit better. Even if I don’t use it, it makes a difference.”

“I think there’s more variety and choice in there now for food, because the café seems to be bigger.”

5.4 Security

Security improvements were a key focus of the scheme, given the importance of both vehicle and personal safety for HGV drivers. Thirty-five lorry parks received investment for security improvements. Of the 25 lorry parks included in the driver surveys, nine implemented security improvements such as CCTV, ANPR, lighting, fencing and gates.

Overall, 315 HGV drivers participating in the survey visited a lorry site with security improvements. Of these, 53% (167) were aware of security improvements and were asked to rate the extent to which they felt vehicle and personal security had improved at the lorry park. The majority of respondents perceived the changes to have been positive:

- 83% reported that vehicle security had improved (69% a lot and 14% a little).
- 78% reported that their personal security had improved (62% a lot and 16% a little).

A small proportion felt that security had remained the same (12% for vehicle security and 17% personal security) and no respondents reported any deterioration in security. The findings indicated that most drivers who were aware of the changes had improved perceptions of both vehicle and personal security at the lorry parks they visited.

Respondents who had noticed security improvements were asked to what extent they agreed or disagreed that these changes made them feel more confident or secure about different security measures at the lorry park they visited. The majority of drivers agreed that all types of security improvements increased their confidence in both personal and vehicle security:

- 98% of 133 respondents agreed that CCTV made drivers more confident about the security of their vehicle and its load (77% strongly agreed and 21% agreed).
- 97% of 111 respondents agreed that fencing made drivers more confident about the security of their vehicle and its load (76% strongly agreed and 21% agreed).
- 96% of 111 respondents agreed that security gates made drivers more confident about the security of their vehicle and its load (77% strongly agreed and 19% agreed).

- 86% of 97 respondents agreed that lighting outside made drivers more confident about the security of their vehicle and its load (57% strongly agreed and 29% agreed).
- 85% of 97 respondents agreed that lighting outside made drivers feel secure when walking around the site (61% strongly agreed and 24% agreed).
- 70% of 141 respondents agreed that ANPR made drivers more confident about the security of their vehicle and its load (48% strongly agreed and 22% agreed).

CCTV, fencing and security gates improvements were especially reassuring for drivers, with almost all respondents indicating that they made them feel more confident about security at the lorry park. The in-depth interviews with drivers provided additional context to these findings. Some interviewees questioned whether ANPR was intended to monitor parking payment rather than to provide enhanced security. Fencing and security gates/barriers were seen as effective in restricting access, separating HGVs from other traffic and deterring unauthorised people and vehicles, such as transit vans, from entering the area.

The in-depth interviews highlighted that drivers felt that CCTV was a useful deterrent for theft and undesirable behaviour, but only if there was real-time monitoring. They explained that seeing security guards at all hours made them feel safest at lorry parks, especially when the guards had dogs and patrolled the parking area regularly. It should be noted that funding for security guards fell outside the scope of the scheme criteria.

“I don’t know if there are any real services connected to the CCTV.... If it’s just for recording, it doesn’t give you too much assurance.”

“Having CCTV, fencing, barriers, and better lighting are massive improvements when it comes to security, but if there’s a real person on site, I always feel so much safer. When you can see a guard sitting there, and they sometimes have dog units as well that do the routine checks.... then you definitely sleep like a baby those nights, in those places.”

5.5 Parking

Adding more parking spaces/bays or improving the layout of existing parking was highlighted in the ToC as important for enhancing the operational effectiveness of lorry parks and making it easier for HGV drivers to find and use parking space.

Parking improvements were made to 13 of the 25 sites where driver surveys were conducted. Improvements were made to parking surfaces, road markings (including bay markings), the number of spaces and signage indicating designated parking bays. In some cases, lorry parks increased the number of spaces available through resurfacing and improved bay markings, even though the amount of land available for parking remained the same.

Overall, 638 HGV drivers participating in the survey visited a lorry site with parking improvements. Of these, 66% (425) were aware of parking improvements and were asked to rate the extent of these enhancements. Eighty-five percent of respondents indicated that parking had improved (57% a lot and 28% a little), suggesting that most drivers who were aware of the changes viewed them positively. Only 1% of respondents stated that parking had become a little worse.

When asked to what extent they agreed or disagreed with various aspects of changes in parking, drivers were mostly positive:

- 77% of 425 respondents were more confident in being able to find a parking space (51% strongly agreed, 26% agreed).
- 82% of 425 respondents felt able to manoeuvre vehicles more easily within lorry parks (52% strongly agreed, 30% agreed).
- 89% of 322 respondents felt the road surface in the parking area had improved (62% strongly agreed, 27% agreed).
- 85% of 425 respondents felt the parking bays were more clearly marked (56% strongly agreed, 29% agreed).

The survey findings suggested that parking improvements may have positively influenced drivers' overall perceptions of and satisfaction with lorry parks. This view was supported by the driver in-depth interviews, in which respondents reported how entering, exiting and manoeuvring within lorry parks had become easier. Interviewees also noted benefits such as reduced concerns of being blocked in overnight and improved ease of parking.

"It used to all be jam packed, just park anywhere. You used to get blocked in at times, you used to struggle to get out, but now it's straight in and out."

"I would think they get more trucks in on a night now... and the area is about the same."

"The parking bays make it a lot easier, you've got definite lines [to] follow."

"It used to be a big open area before. [As] a transporter driver... it's quite daunting, because you are longer than a standard HGV. We've got nice, even ground, and it's easier to manoeuvre around the site now."

In the in-depth interviews, drivers added that resurfacing meant they no longer worried about trying to avoid potholes. However, some expressed reservations about the durability of the improved surface and whether it would withstand wear and tear over time, preventing a return of the previous issues.

"[Before] it was horrendous, and there were so many massive holes, it would shift the load in the truck sometimes. It's good for the drivers just to turn around because it's nice and flat, which is important, especially if you're carrying dangerous goods... You need to have a few months of use, and then you can actually see how good the quality is and if it holds up."

5.6 Scheme success to date

During the in-depth interviews, some drivers stated that they now visited the lorry park they were interviewed at more because of the improvements made. One driver explained that they previously stopped in a layby because the lorry park felt disorganised and was not worth the parking fee. However, following the improvements, they chose to stop at the lorry park instead. Although this was mentioned by only one driver, it suggests that such enhancements could positively influence driver behaviour and decision making.

“There’s a layby a couple of miles up the road. [Before the parking improvements], I used to stay there, because sometimes you couldn’t get in here to park, even if there was one space I wouldn’t have attempted it, I’m sure the bays weren’t this big. Now, I’m coming here instead because it’s easier to park [and] I know that I’m in a safe place with cameras and good lighting, so [cost is] worth it.”

5.7 Retention and recruitment of HGV drivers

The scheme’s main objective was to improve the quality of lorry parks, contributing to the longer-term aim of improving driver working conditions and HGV driver recruitment and retention rates. Views on HGV driver retention and recruitment were covered in the driver and industry stakeholder in-depth interviews as these topics were considered too complex to sufficiently explore in the driver survey.

Some drivers expressed disappointment that, after feeling valued and prioritised during the Covid-19 pandemic, they now felt forgotten and undervalued. This was an important contextual factor for many drivers, in the lead up to the scheme evaluation.

“During Covid-19, we were the best thing going, and as soon as Covid-19 finished, that stopped. If all the drivers stuck together and suddenly went, right, we’re not delivering today, the country would just grind to a halt overnight.”

“You want to be kind of looked after a little bit and for your job to actually be rewarded, aside from your wages. You just want to be appreciated, because obviously the job is fairly dangerous. You have loads of things at stake.”

5.7.1 Driver retention

All drivers interviewed intended to remain in the industry for at least another five years, expressing overall satisfaction with their work and its financial rewards. However, they highlighted some negative issues, including the antisocial nature of the job and extended periods away from home. More positively, drivers appreciated feeling listened to by staff at some lorry parks, who welcomed them and provided an opportunity to talk.

“Other sites could learn from the friendliness of staff here... It’s a lonely lifestyle being a trucker, but there’s a good atmosphere here. Drivers can park up, not be under any stress, have something to eat, have a relax.”

There was a general view among HGV drivers that the quality of lorry parks, including their facilities, parking and security affected driver retention. High quality provision, such as access to washing facilities and a secure place to rest overnight, were seen as important in helping drivers to feel more positive.

“All you want to do at the end of the day is park your cab, go for a shower, get some food, kick your boots off and relax... You get your basics that way then settle back in the cab, because at the end of the day, that’s our home away from home.”

“Everyone should improve their site. It has to be maintained to at least a decent state. If you’ve been sleeping in the truck all week and then come to a dirty place, you feel like you have no home. Once you come to a clean place, you feel a little bit like a human at least.”

More generally, HGV drivers interviewed felt there needed to be more lorry parks across the UK, to increase the number of parking spaces/locations available. Evidence from the [Transport Focus Lorry Drivers' Facilities Survey](#) was aligned with this, with around two-thirds of drivers being dissatisfied with the number/quality of lorry parks.

Some drivers in the in-depth interviews felt that the perceived shortage of lorry parks affected driver retention, as the difficulty of finding safe stopping places in certain areas/regions was demoralising. Those who felt the number and quality of lorry parks did not affect driver retention explained that other factors were of greater concern to them. This included pay and working conditions, the requirement to renew their Certification of Professional Competence (CPC) every five years, how they are treated by their employer and time spent away from home.

"It's not all about the wages [or facilities]. It's the working conditions. I'm semi-retiring because I want a better quality of life, so I want to do less hours. It should be made like a normal working week where most people do 40-48 hours, rather than hammering out 60 hours or more every week and then be expected to do overtime on a Saturday."

"I think you see it in cycles, with a lot of drivers retiring at the end of their CPC years. You've got to do 35 hours of training every five years, and some drivers walk away when they have to renew because they don't want to go through that anymore when they've already been doing it 20, 30, or even 40 years."

5.7.2 Driver recruitment

Some drivers interviewed felt the facilities, parking and security at lorry parks were a low priority when deciding whether to become a driver. Pay and working hours were felt to be a greater consideration.

"I'm a new driver, and it's all about wages [for me]. I didn't consider the facilities or anything like that, but I wouldn't say I'm surprised at the conditions or what's available. It just comes with the job."

"I think the wages and the amount of hours they have to work are what [new drivers mainly] think about... If the wages were higher and the average hours were less, then it might encourage more youngsters to come through, but they just don't want to do 60-hour weeks."

Some drivers stated that new drivers faced barriers to entering the industry, including the prevalence of short-term contracts and the high initial cost of insurance.

"To be able to get a young driver with little experience insured is actually hard work, because their excesses are stupidly high. [My] insurance company is actually pricing out young drivers. Some companies say you've got to have six months' experience, or you've got to have twelve months experience. How do they get that experience if no-one's willing to give them a shot?"

5.8 Priorities for future investment at lorry parks

All 1,224 driver survey respondents were asked to select one of five investment categories to prioritise for future funding. Parking (25%) and security (21%) emerged as the top priorities, although there was good coverage across all categories including toilets/showers 16%, café 12% and lounge/seating 5%. The broader

category of lorry park facilities accounted for 33% of responses when toilets, showers, café and lounge/seating were aggregated.

Among the 5% who stated 'other', some felt that all areas should have equal priority, while others suggested additional priorities such as Wi-Fi access, improving vehicular access to/from the road, improving shops and increasing the number of lorry parks. Fourteen percent of respondents chose 'nothing' to be prioritised.

Drivers aged under 35-years-old were more likely to choose parking improvements (33%) or facilities (31%) as a priority rather than security (18%). Female respondents, who made up a small proportion of the sample (1%), identified specific priorities for lorry park improvements:

- Eight identified a toilet/shower block as the highest priority for improvements and two specifically mentioned the need to improve showers.
- Two identified security as the highest priority.
- Two identified parking as the highest priority.
- One identified café improvements as the highest priority.
- One identified the lounge/seating area as the highest priority.
- Two were unable to identify a single priority (selected 'don't know').

The in-depth interviews with HGV drivers reinforced the survey findings on priorities for future investment (see Table 5.1 below **Error! Reference source not found.**).

Table 5.1 Respondent priorities at lorry parks from driver in-depth interviews

Priority	Important aspects for respondents
Parking	Sufficient parking capacity to reduce the risks of not being able to find an available space.
	Good organisation of parked vehicles and reducing the risk of being blocked in by other vehicles.
	Sufficient space to drive around the lorry park and manoeuvre HGVs, especially for larger vehicles such as car transporters.
	Good surface quality throughout lorry parks, particularly in the parking area.
Security	Security guards and patrols were highly valued (although these were out of scope for the scheme).
	Feeling of safety at the lorry park, both for drivers and their vehicle/load.
	Drivers valued improvements in CCTV, ANPR, lighting, fencing and gates.
Toilets and showers	Sufficient toilets and showers for the size of the lorry park, to reduce queuing.
	Good levels of cleanliness and general maintenance.
Café and other factors	A greater choice of cooked food and better value for money for food and drink.
	Friendly and welcoming staff, which has a large impact on drivers experience at a lorry park.

Drivers interviewed felt that lorry parks lacking high standards in facilities, parking or security could negatively affect drivers and contribute to feelings of being undervalued. They also described experiencing disrupted sleep when they felt less secure.

“If there’s no security, you don’t sleep properly, and you’ve always got one ear open for diesel theft or tampering with your vehicle.”

“At motorway services, there is no security. The only cameras there are to get your registration on the way in and the way out... but there is no security on top of that, and that’s why there are so many thefts in motorway services. Because of that, you don’t sleep properly.”

Drivers interviewed indicated that while they appreciated improvements to lorry parks, increasing the number of available sites should be the top priority for the future.

“I think it’s a big issue. Drivers complain all the time about there not being enough facilities and not enough places to stay. That would be the biggest improvement for the whole country if they would just increase these points, because sometimes they’re too far from each other, and you are very limited with driving time.”

Some drivers felt that lorry parks were closing at a faster rate than new ones were opening, leaving certain areas of the UK with limited available sites. In the in-depth interviews, drivers shared examples of exceeding their allotted driving time while searching for a place to park, highlighting serious implications for road safety.

One driver suggested MSAs could improve driver welfare by developing a priority service or loyalty card. They felt this would especially support drivers on time-limited breaks.

“Everything on the motorway is more expensive. I know they’ve got overheads, I do understand that, but for truck drivers, why can’t we have some sort of loyalty card... [it] would make a lot of difference.”

“For food [and shops], there should be an HGV driver’s express lane.... It’s all about time, and time is everything to HGV drivers.”

5.9 Industry stakeholder findings

This section summarises the findings from the in-depth interviews with five industry stakeholders. While some industry stakeholders were already aware of the scheme, mainly through direct engagement with the DfT or industry communications, others had limited or no prior awareness before being interviewed. Across the small sample, industry stakeholders' main interest in the scheme centred on ensuring that funding was or had been used appropriately and effectively to improve lorry parks for the benefit of HGV drivers and the wider industry. The interviews also provided insights into the broader context in which the scheme operates, and the improvements made to date.

5.9.1 Current situation

All industry stakeholders highlighted the variation in quality across lorry parks nationwide, noting that those which were generally busier and well-used tended to be of higher quality and better maintained. However, they also felt that the historic lack of investment from government and industry had left operators with little incentive to raise standards, especially given that many sites were often operating at full capacity for overnight parking.

“Truck stops have no incentive to improve their facilities because they know they'll be full anyway. The utilisation figures speak for themselves. On almost a weekly basis, the utilisation figures for the A14 between Cambridge and Colchester are 100% at every single site.”

Industry stakeholders felt there were insufficient lorry parks and an inadequate volume of parking capacity to meet the needs of the current number of vehicles in the sector. This contributed to drivers parking in off-site locations, such as laybys, which posed safety and security concerns for drivers, their vehicles and the goods they were transporting.

“There has been an industry failure when it comes to the provision of truck parking as it has just been left up to the private sector to provide truck stops. We estimate that 11,000 extra spaces are needed to guarantee an HGV driver will get a secure space where they can park overnight.”

Truck stops were generally considered to be of better quality and to cater to HGV drivers better than MSAs. It was felt HGV drivers were an afterthought for MSAs who also needed to consider other road users. Industry stakeholders felt that lorry parks should be required to meet minimum standards for facilities, safety and parking with an example of the British Parking Association's Park Mark Freight standard mentioned by one stakeholder.

“All sites should have a secure perimeter through whatever means, which can be fencing. They need a manned guard, barriers, and cameras. That would be the absolute minimum.”

Industry stakeholders viewed parking and security as the main priorities for drivers and their vehicles. Security measures like CCTV, fencing, barriers and lighting were all considered to be important. However, the presence of security guards and staff who monitored and patrolled lorry parks was felt to have the biggest impact on the safety and security of a lorry park and drivers' confidence in feeling secure at night.

“From the freight crime statistics we have, the vast majority [of thefts] do not involve any interaction with the driver. The driver is asleep in the cab when it when it occurs.... and [they] slept through it.”

Industry stakeholders believed that the quality of lorry parks could have a significant impact on drivers. They felt that staying at low-quality sites could affect driver concentration, motivation, stress levels, safety, quality of rest and overall performance. These impacts, in turn, could lead drivers to avoid certain lorry parks.

“[HGVs] are the largest vehicles on the road. You want the operator of them to be in the best possible physical condition. They do a job the entire economy relies upon.”

5.9.2 Awareness of the scheme

Only some industry stakeholders were aware of the match funding grant scheme, having learnt of it through direct engagement with the DfT and/or industry announcements. Among those who were aware, knowledge of the full mechanisms and channels the DfT used to promote the scheme to potential applicants was limited.

Industry stakeholders believed that the most effective way to raise awareness was through a combination of direct and indirect channels. They suggested that the DfT could inform industry bodies, organisations and all potential applicants about the scheme through official announcements, press releases, social media, emails/letters and existing face-to-face engagements. In turn, these bodies could disseminate the information to their members. They noted that some industry stakeholders had already done so via newsletters, emails, social media, industry magazines and in-person engagements.

Industry stakeholders acknowledged the challenge for the DfT to engage with all potentially interested applicants; they believed there was no database of all lorry parks within the industry. Engaging with independent operators was considered difficult due to their limited resources and presence.

“I wouldn't fault any of the engagement strategy from DfT and trying to get the word out there... It's tough because there are a lot of independent truck stops that are independent businesses without major online presence, so it can be hard to get the word out there... I don't think DfT really got a sort of record of all the sites that do exist.”

5.9.3 Criteria of the scheme

Once the scheme's criteria were explained, industry stakeholders agreed it was reasonable to require operators to provide an evidence base and track record (at the application stage) to mitigate risk when allocating public funds. However, some felt that the DfT should consider how future schemes could support the creation and development of new lorry parks, rather than focusing solely on improving existing sites. It was suggested that the scheme could be extended to those with land available for development. By doing so, it was felt the scheme could help to “fill in the gaps in the network” and expand parking capacity.

“I think the main barrier to applying is the fact it had to be a previously operating site... When we are in a situation where we need more new sites to be built, we're not going to get the number of spaces we need just by growing

the ones that we have. Also, we need to fill in the gaps in the network where there is a real lack of facilities.”

“While we can understand why they weren’t pursued, we think it would have been more beneficial to allow these [new sites] types of applications.”

Industry stakeholders welcomed the broad scope of improvement works covered by the scheme, noting that it provided valuable flexibility for operators. One industry stakeholder suggested that enhancements such as improved Wi-Fi at lorry parks and staff training could also be included within the scheme’s scope.

Some industry stakeholders suggested that the DfT should reconsider the scheme’s timing requirements, particularly the deadline for completing improvement works. They highlighted that operators may encounter various issues that could delay works, particularly in relation to securing planning permission.

“I think they need to extend the deadline for when [improvement works] need to be completed by, and they should widen the categories and allow changes that require planning permission.”

5.9.4 Scheme benefits

All industry stakeholders felt that the scheme could be highly beneficial for all lorry parks, particularly for independent operators and single site owners. They indicated that due to limited financial resources, these operators would have been unable to make improvements without match funding.

They also felt that the DfT should consider how accessible the scheme is for independent operators and review the profile of those who applied for the funding. They believed that larger organisations had more resources and experience with such schemes, making them better placed to apply and benefit from the funding.

“It’s allowed, potentially, sites to make investments that they would have struggled to justify commercially, and I think particularly in the upgrading of things like gyms or the upgrading of facilities that were already there, that doesn’t necessarily bring a direct pay back initially in terms of income... I think that appears to be the main benefit, allowing money to be spent where it would have been difficult to justify if it was purely a commercial investment.”

There was a view among industry stakeholders that there should be more emphasis on drivers’ mental health through the scheme. Suggestions included requiring applicants to consider how proposed improvements might impact the physical and mental health of drivers, with this assessment forming part of their justification for the changes to their lorry park.

“What we’re seeing [in other areas] is that when clients are doing bidding frameworks, they’re asking for evidence of how they are supporting mental well-being with their bid and proposal and incorporating a whole element around that, so you can be quite explicit about it.”

Consistent with the views of lorry park operators, industry stakeholders felt that drivers were unlikely to perceive any direct benefit from improvements related to decarbonisation at lorry parks. They believed drivers’ primary concerns were on parking, security and facilities. Nonetheless, there was a view that decarbonisation was a positive step for the industry in its efforts to reduce the environmental impact of lorry parks.

“If I’m a driver, how is [decarbonisation] benefiting me? I’m very supportive of decarbonising the industry, but I think it’s a little premature in the industry... It’s mainly the bigger organisations that would be able to do it because it’s a lot of money [to make such improvements].”

Prior to the interview, not all industry stakeholders were aware of the improvements made to lorry parks using the funding, or of the resulting benefits. They would have expected to see media coverage and promotional materials about the improvements and how the scheme had benefitted lorry parks. They felt that the absence of such communication represented a missed opportunity for the DfT and the operators who had completed their improvement works.

“I don’t think anything has been published, like the successes, which I think is potentially a missed opportunity now talking about.”

Industry stakeholders hoped the scheme would deliver visible and meaningful improvements to lorry parks and that drivers would recognise and benefit from the changes. They also felt that the investment would drive up industry standards. There was a view that the scheme could stimulate greater private investment in lorry parks, helping to further improve facilities and increase competition. They viewed this as particularly important in a sector where investing in improvements was often perceived as a “gamble.”

“I hope drivers can feel more appreciated in the work they do and that they can see these improvements... It gives drivers more reason to come and stay on their sites. We know it’s obviously a low competition environment as it is, but we want to create a high competition environment. If we do get to the place where drivers actually have a choice, the places that have been able to invest in their facilities will have a better position.”

“I’m hoping this kind of bridges some of that commerciality gap and encourages some of that private sector investment, which hopefully then in turn creates more of a return for the site operators, which allows them to reinvest in their facilities. To get more investment, it is [usually] a bit of a gamble for site owners or operators.”

5.9.5 Retention of drivers

Industry stakeholders felt that both the availability of lorry parks and the quality of their facilities, parking and security played a crucial role in driver retention, particularly in shaping how valued and supported drivers felt. There was a view that more lorry parks and better standards were needed throughout the country.

Industry stakeholders shared concerns about the aging driver workforce and the potential labour shortages that could emerge as older drivers retired. A range of push factors contributed to drivers leaving the industry, including long working hours and the unsociable nature of the role. Concerns were raised about the behaviour of other road users and the way members of the public treated HGV drivers. In addition, industry stakeholders highlighted the challenges drivers faced when renewing their CPC. It was felt that the cost and time involved in the renewal process had contributed to some drivers choosing early retirement.

“The average age of an HGV driver is 52. They introduced continuous professional qualifications and training for drivers around 10 years ago... Every

fifth year, the cohort who did their first training need to redo it. At that point, some of them are thinking, do I want to do this for another five years? Is it worth [it]?”

5.9.6 Recruitment of drivers

Industry stakeholders highlighted several benefits of being an HGV driver, including a sense of freedom, opportunities to travel, competitive salaries and opportunities for personal development. However, they also noted several deterrents to attracting new recruits, particularly younger drivers; such as unsociable working hours, extended periods of time away from home, concerns about job security, difficulties with insurance and overall working conditions. Industry stakeholders indicated that younger drivers were less willing to stay at lorry parks overnight and increasingly sought greater flexibility in their working patterns. They suggested that HGV driving should be positioned as a viable career path, offering opportunities for career progression into other roles within the industry to enhance its appeal.

“For many, the idea or the fact that you have to be away from home for significant amounts of time is already a big issue, and then they think about the quality of the places they're going to have to stop. You've got to be willing to travel without a lot of the very, very basic home comforts. It's well known the reputation of our truck stops has been poor for a very long time, and we've seen it's something that puts people off coming into the industry.”

In light of the issues raised, there was a view among industry stakeholders that lorry park facilities, parking and security would be less influential in attracting new drivers to the industry.

5.9.7 Future schemes

Industry stakeholders suggested that future DfT schemes should prioritise independent operators with greater financial need as they would be more likely to benefit than larger operators. There was also a view that the DfT should offer increased support to applicants during both the application stage and the wider process, given the limited resources available to some operators.

Industry stakeholders felt that more investment and schemes like the MFGS were needed to continue improving existing lorry parks, as well as creating new lorry parks and areas where HGVs can park.

“We need more of the same. £32.5 million in the DfT scheme, and there's a National Highway scheme as well. it's not an insignificant amount, but it's still relatively a drop in the ocean, so we need more of the same really.”

Industry stakeholders felt there needed to be more consideration for HGV drivers and lorry parks in planning processes and new developments, at both the national and local level. It was suggested that the DfT should be “championing planning reform” in this area, ensuring the existing gaps in the network do not worsen.

“When it comes to planning policy, we need what I call the golden thread that runs through every layer of policy, from national all the way down to local. There needs to be a consideration of the need for truck stops. That will then mean that we can start getting more sites built out and hopefully increase capacity and push up the quality as well.”

“I think the DfT could be a champion for other policy changes that might support improvements, so championing planning reform to help ensure facilities can go where they’re needed.”

6. Impact Evaluation Contribution Narrative

6.1 Approach to Contribution Analysis

This section draws together primary research findings from the driver survey and in-depth interviews, industry stakeholder interviews and other available evidence to present an overarching narrative on the scheme's contribution towards the observed outcomes.

Using contribution analysis principles, the strength of each evidence source was assessed using the following rubric:

Table 6.1 Evidence strength assessment

Strong Evidence:	Where there were multiple data sources and consistent findings.
Moderate Evidence:	Where there were multiple data sources but findings were not always aligned.
Weak Evidence:	There was only a single source of evidence.

The level of confidence that the scheme contributed to each of the observed outcomes was also assessed, according to the following rubric:

Table 6.2 Scheme contribution assessment

High confidence:	The evidence strongly indicated that all, or almost all, key evidence gaps were filled and alternative explanations were sufficiently dismissed.
Medium Confidence:	The evidence indicated the intervention contributed to the outcome, but there were some missing pieces or alternative explanations that could not be completely ruled out.
Low confidence:	The evidence was weak, suggesting only a minor or uncertain contribution to the outcome, with significant gaps in the causal chain.

In addition, a workshop was held with key DfT stakeholders to test and confirm the conclusions about each contribution claim. For each outcome, the contribution claim and mechanisms for change are set out, including any assumptions. The findings are caveated by the evaluation limitations described in Section 3.5.

6.2 Theory of Change outcomes

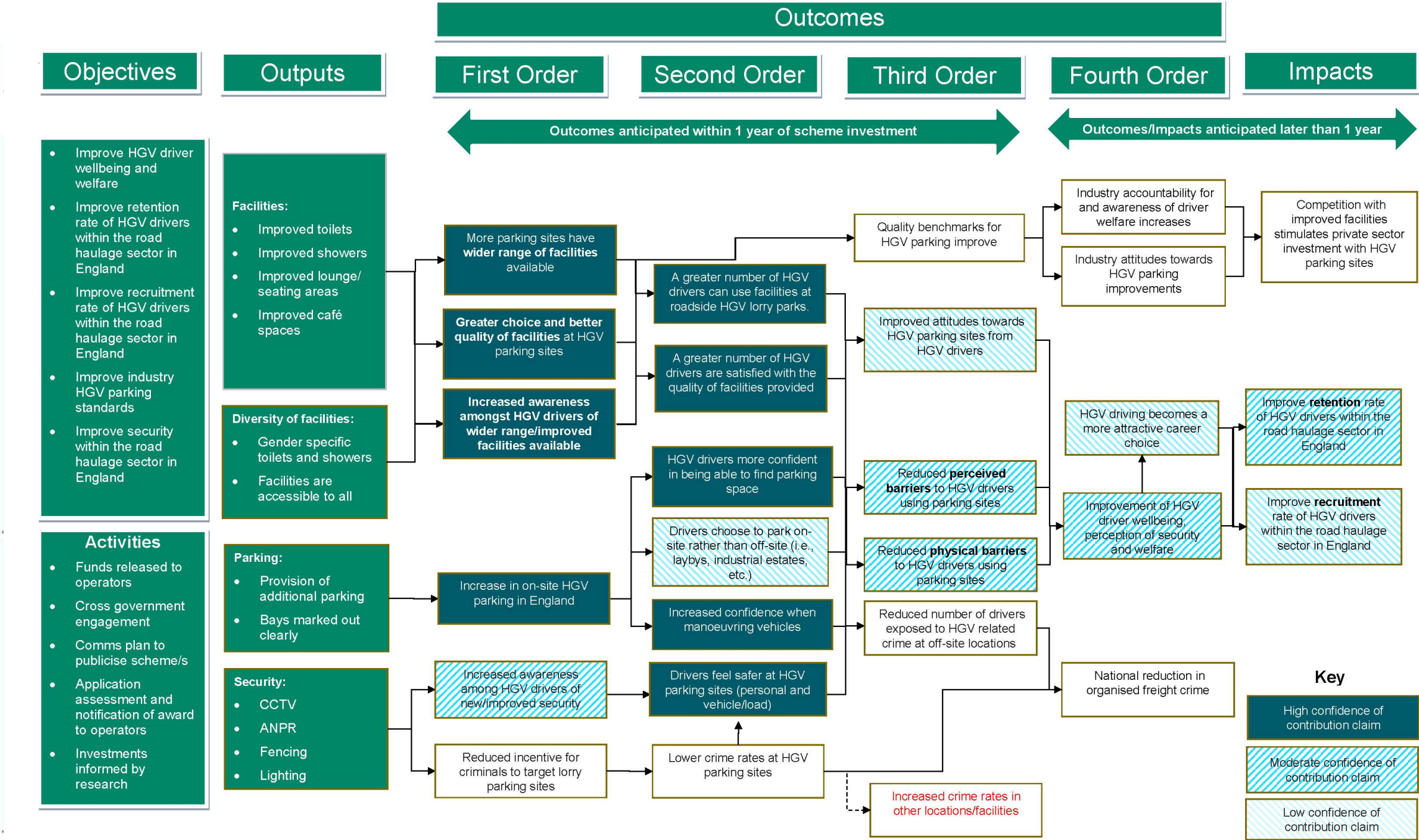
Figure 6.1 shows the scheme ToC logic map, setting out the individual anticipated outcomes, combined causal pathways and how each outcome was considered likely to contribute to the end impacts.

A timeline has been incorporated into the ToC to illustrate the outcomes that were anticipated to be realised within 12 months of the scheme; this covered the first, second and third order outcomes. The fourth order outcomes and impacts were

anticipated to need a longer timeframe to materialise. This was important context to the contribution analysis and assessment of confidence for each claim.

The logic map has been colour coded to indicate the level of confidence that the scheme contributed to each of the observed outcomes. Those outcomes that have no colour in the logic map were considered to be outside the remit of the evaluation; see Appendix I for further details on these outcomes.

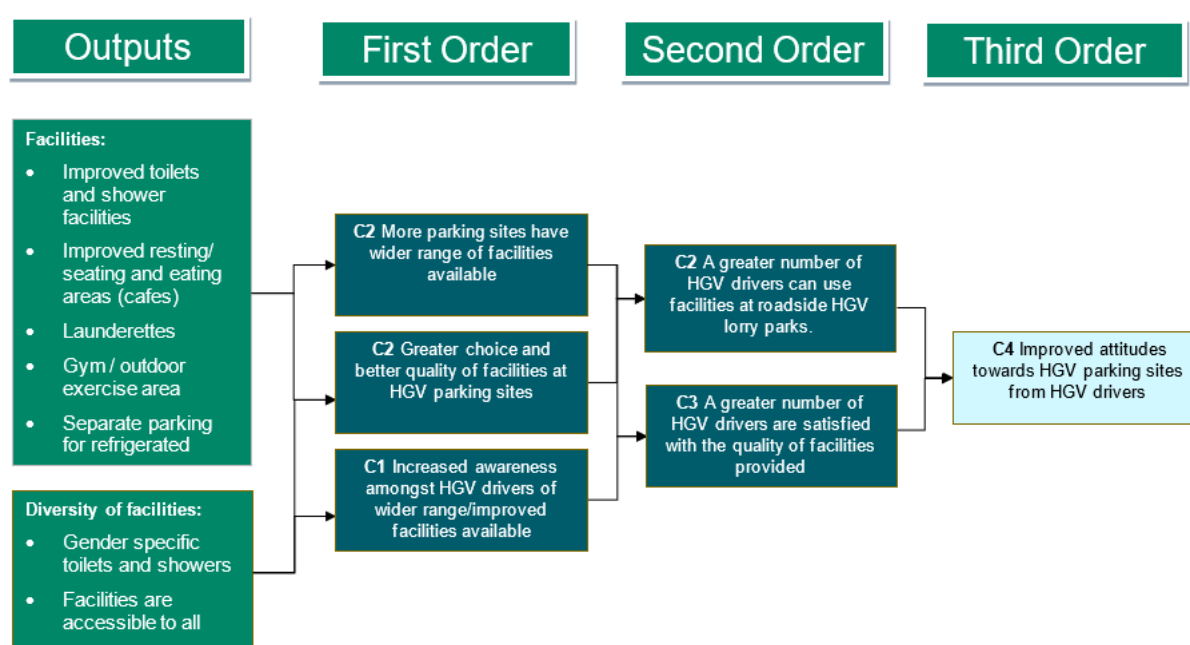
Figure 6.1 Theory of Change Logic Map: Summary of progress towards the outcomes



6.3 Facilities

The first part of the ToC for the scheme focused on investment in facilities for drivers, including showers, toilets, cafés and seating/lounge areas. As reproduced below, for this specific pathway (Figure 6.2), these improvements were anticipated to lead to three first order outcomes focusing on HGV drivers' awareness of the changes and the new facilities available to them, and subsequently to increased use and satisfaction with facilities (second order). A key third order outcome was anticipated to be improvements in HGV driver attitudes towards lorry parks. The contribution claims presented in the evaluation have been numbered (e.g. C1) to show their location in the ToC; some claims include more than one outcome shown in the ToC.

Figure 6.2 Facilities causal pathway



6.3.1 Driver awareness of investments

Contribution Claim 1: The investment in facilities and improved provision/quality of such facilities, contributed to increased awareness amongst HGV drivers of the wider range/improved facilities available at specific lorry parks.

Both the driver and industry stakeholder interviews revealed that HGV drivers felt forgotten following the Covid pandemic and often felt undervalued as a result. Demonstrating their value to the industry and wider society through the scheme investment was therefore an important initial outcome. Increased awareness was measured through HGV driver survey respondents' knowledge of, or exposure to, the improvements made and the wider/improved range of facilities available to them. The underlying mechanism for this outcome was that HGV drivers would observe and discuss the investment activities and facility improvements, leading to increased awareness. Increased awareness was also assumed to be an important precursor to drivers' perceptions and satisfaction with lorry park facilities, security and parking.

The driver survey highlighted that 81% of respondents noticed at least one improvement made at a lorry park (with many noticing more than one at their specific

location), demonstrating a high level of awareness of the changes made. The in-depth interviews with HGV drivers confirmed their awareness of, and support for, operator investment in lorry park improvements.

Some industry stakeholders interviewed were also aware of the funding scheme and there was broad consensus that such improvements would be beneficial to drivers using the lorry parks. It should be noted that lorry park operators were also able to obtain funding from National Highways to make improvements, although recipients of such support were excluded from the DfT scheme. There was some positive [press coverage](#) of the scheme, with a lorry park featured indicating how the improvements would attract a broader range of HGV drivers and a driver predicting that others would seek out such facilities.

There was **strong evidence** and a **high level of confidence** to support the claim that the scheme contributed to achieving the first order outcome of increasing driver awareness of 'a wider range and improved facilities at lorry parks'.

6.3.2 Availability and quality of facilities

Contribution Claim 2: The provision of more and improved facilities through the scheme increased the overall provision across lorry parks, providing drivers with better facilities.

Two key outputs from the scheme were an increase in the number of facilities available to drivers and improvements in their quality. These enhancements were intended to improve the working conditions and the attitudes of HGV drivers' towards lorry parks. Out of 328 lorry parks in England, 70 received match funding from the DfT (21% of all lorry parks) in windows one and two. There were 46 lorry parks (14% of all sites) that used the scheme to improve lorry park facilities. There was an underlying assumption that lorry park operators did not remove or reduce other facilities to enable scheme investment to be delivered, which could have reduced overall provision. This assumption was confirmed during discussions with the DfT to review confidence in the contribution claims.

Scheme investment increased both the availability and quality of facilities for HGV drivers at the specific lorry park locations, which would positively influence driver's perceptions and satisfaction with these facilities. The driver survey showed that 66% of respondents were aware of recent improvements to toilet and shower facilities. Among those who noticed the changes, 85% believed they had improved the quality of facilities and 93% thought the toilet/showers were now more modern and fresher.

Furthermore, 85% thought the number of available toilets had improved and 79% reported improvements in the availability of showers. A similarly positive response was reported in the driver survey in relation to the provision and quality of café and lounge/seating facilities, with 70% of respondents aware of such improvements. Among those who had noticed the changes, 95% thought the café and seating areas had improved, 99% found the seating more comfortable and 87% believed there were greater opportunities to talk to other drivers.

The driver in-depth interviews provided evidence that drivers appreciated the café and lounge/seating area improvements, whether they used them or not. Walking into a building with a welcoming lounge area, led them to feel more valued. Taken together, this evidence highlighted the scheme's positive contribution to drivers' perceptions of facilities, both in terms of availability and quality as well as their overall wellbeing, by creating more opportunities for social interaction.

There was again **strong evidence** and a **high level of confidence** to support the claim that the scheme contributed to achieving the first order outcomes of more lorry parks providing a wider range of facilities and HGV drivers having a greater choice and better quality of facilities. The greater quantity and quality in provision of facilities also supported the claim that the scheme will have positively contributed to the **second order outcome** of a higher number of HGV drivers being able to use facilities.

Contribution Claim 3: The provision of more and enhanced facilities lead to an increase in driver satisfaction with facilities at lorry parks.

As set out in the scheme ToC, the above first order outcomes were anticipated to lead to increased HGV driver satisfaction with the quality of lorry park facilities. This assumed that drivers used the new facilities and therefore benefited directly from them. It was also assumed that drivers who were aware of changes but had not used the facilities, might also report improved satisfaction, though to a lesser extent.

The majority of driver survey respondents who were aware of improvements reported enhanced quality across all facility areas, including toilets, showers, café and lounge/seating areas. In-depth interviews echoed this, with drivers expressing that improvements made them feel valued. This sentiment was further supported by an industry stakeholder who hoped the investment in facilities would help HGV drivers to feel more appreciated. Although the driver survey did not include direct questions about satisfaction, due to constraints on questionnaire length, the consistently high ratings of facility quality and the positive sentiments from the in-depth interviews provide a proxy for driver satisfaction. In addition, as illustrated below, online reviews given by HGV drivers to a lorry park that had benefited from the scheme indicate that improvements had contributed to increased satisfaction.

“Lovely food which is good value as well as brilliant showers. In an area where fuel theft is an issue this truck stop is a place to treasure.” (5-star rating)

“Very good, lots of parking not too busy. Tidy food and drink. Hot clean showers, Even have a gym room with new working equipment.” (5-star rating)

There was **strong evidence** and a **high level of confidence** to support the claim that the scheme contributed to achieving the **second order outcome** of a greater number of HGV drivers were satisfied with the quality of amenities at lorry parks.

Contribution Claim 4: The enhancements in facilities and improvements in HGV driver satisfaction lead to an improvement in driver attitudes towards lorry parks.

It was anticipated that the positive change observed in first and second order outcomes around awareness and satisfaction, underpinned by the physical improvements themselves, would contribute to improved driver attitudes towards lorry parks. However, whilst the first and second order outcomes were all achieved, there was no compelling evidence from the driver survey to indicate that attitudes of HGV drivers towards lorry parks in general had changed. This was primarily because the survey did not include questions to measure attitude change due to questionnaire length constraints. The reviews shown above (Claim 3) and the one below indicate favourable attitudes towards the lorry park visited:

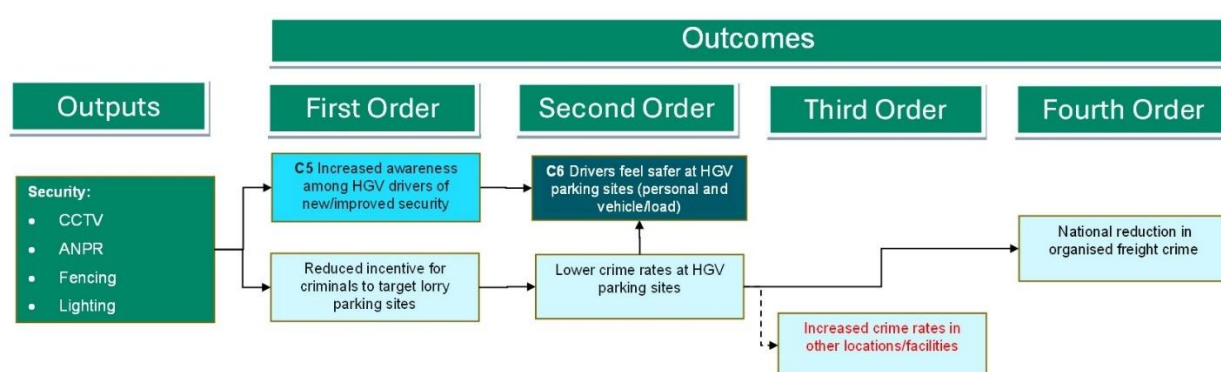
“Brilliant food and safe, very helpful; definitely worth going when in area.” (No rating given)

It was concluded that there was **weak evidence** and a **low level of confidence** to support the claim that the scheme contributed to the third order outcome of improving HGV drivers' attitudes towards lorry parks. When reviewing the contribution narrative, the DfT noted that the likely contribution of the scheme would reduce when considering third and fourth order outcomes and impacts, or changes would take longer to materialise. Furthermore, attitudes would be influenced by a range of factors, including wider freight industry trends, which would further reduce confidence in the contribution claim.

6.4 Security

A causal pathway within the scheme ToC related to personal and vehicular security (Figure 6.3) whilst using lorry parks. This included HGV drivers' awareness of improvements in security provisions, perceptions of safety and the influence on the levels of lorry park related crime.

Figure 6.3 Security causal pathway



6.4.1 Driver awareness of safety improvements

Contribution Claim 5: The investment in security contributed to HGV drivers being more aware of the provision at specific lorry parks.

There were 35 lorry parks that used the scheme to improve security measures, with driver surveys undertaken at nine of these locations. The physical provision of new/enhanced security systems (e.g. gates, fences, lighting or CCTV) was assumed to influence drivers' awareness of security at the specific lorry park. This would either be through direct observation of such changes or through discussions with other drivers. It was recognised by industry stakeholders that this would be more likely for improvements such as gates and fencing, which were made at 17 lorry parks.

Evidence from the driver survey showed that 53% of respondents were aware of security improvements, which was lower than the rating for facilities and parking. This could be due to security improvements, such as CCTV which were made at 24 lorry parks, being less obvious to drivers and lighting not being needed during the time of surveys (2pm to 8pm during British Summer Time). The relatively low level of awareness amongst HGV drivers reduced confidence that the contribution claim was true.

There was **moderate evidence** to support the claim that the scheme contributed to achieving the first order outcome of increasing driver awareness of 'new/improved security'. A **medium level of confidence** was also assigned to this outcome given the limited visibility/awareness of security improvements.

6.4.2 Driver perceptions of safety at lorry parks

Contribution Claim 6: The improvements made in security measures and awareness of these amongst HGV drivers, contributed to improvements in perceptions of safety when using lorry parks.

The assumed mechanism for change in this causal pathway was that drivers' increased awareness of improved security would directly influence their perceptions of safety/security. Seeing improvements, such as new gates and fences, was anticipated to have been central to this process.

There was positive evidence amongst driver survey respondents who were aware of security improvements. Overall, 83% felt vehicle security had improved and 78% that personal security had improved. Furthermore, improvements such as CCTV, fencing and security gates enhanced perceptions of safety at lorry parks, with at least 95% of drivers agreeing that each of these measures made them feel more confident. Similarly additional lighting was well received, with 86% agreeing it made them more confident.

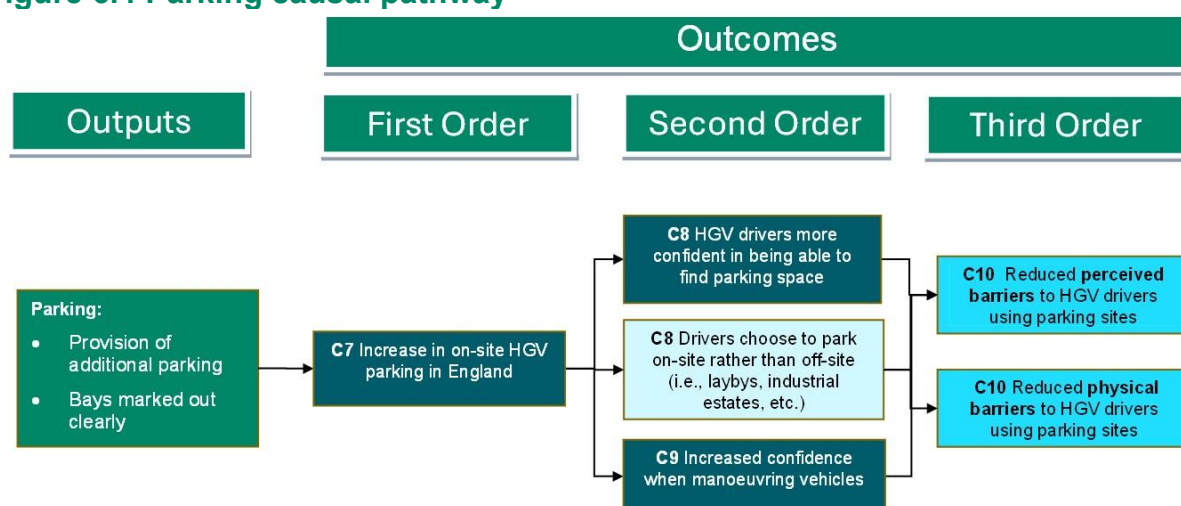
The in-depth interviews with drivers added further context to how the scheme could have contributed to improved perceptions of safety, including the benefits of fencing and gate barriers to restrict other vehicles accessing parking areas. However, some drivers noted that they would only consider CCTV as an improvement if it was being monitored in real-time, especially through the night. This evidence also needs to be considered within the context of media articles that were published before and during the two phases of the evaluation, which may have negatively influenced respondents perceptions of security; BBC [lorry thefts: stolen cargo, stress and slashed curtains](#) and the RHA [freight-crime-spirals-out-of-control-as-value-of-goods-stolen-rises-to-over-100-million](#).

Taken together, security measures were perceived as having contributed to greater confidence in security. There was **strong evidence** and a **high level of confidence** to support the claim that the scheme contributed to achieving the second order outcome of improving the perception of security at lorry parks.

6.5 Parking

The third main causal pathway within the scheme's ToC related to the provision of additional or enhanced parking within lorry parks (Figure 6.4). This was assumed in the ToC to be an important precursor to increasing driver confidence in being able to find a parking space and manoeuvre their vehicles within the site boundary. Both were considered likely to contribute to removing some of the key physical barriers to drivers using designated lorry parks.

Figure 6.4 Parking causal pathway



6.5.1 Availability of parking at lorry parks

Contribution Claim 7: The investment contributed to increasing the availability of parking spaces at specific lorry parks.

The mechanism for this change was that the scheme would directly result in the implementation of additional parking spaces or more efficient use of space through the marking of bays in existing parking areas. There was also an assumption that lorry park operators did not make other changes to their parking, such as removing other bays to facilitate a new café or shower block. There were 30 lorry parks that used the scheme to increase/improve on-site HGV parking, with driver surveys undertaken at 13 of them. Survey evidence showed that 67% of drivers were aware of parking improvements at sites where improvements were made, of which 85% thought parking had improved. While survey respondents noted an increase in the number of parking spaces, there was no robust audit data available to the evaluation to fully evidence this.

Some parking spaces seen by drivers may have been funded only through an alternative funding mechanism, and this cannot be considered a contribution of the DfT scheme. It should also be noted that the process evaluation found that some operators would have invested in improvements anyway and that the scheme allowed increased or accelerated delivery. Whilst this introduced some uncertainty regarding the extent to which external factors influenced parking provision, it was not considered substantial enough to reduce confidence in the contribution of the scheme.

There was strong evidence and a high level of confidence to support the claim that the scheme contributed to achieving the first order outcome of increasing on-site HGV parking in England.

6.5.2 Confidence in finding a parking space

Contribution Claim 8: The availability of more parking spaces contributed to drivers feeling more confident in finding a free parking space when needed. This was also linked with the claim that additional parking provision would encourage drivers to choose to park on-site rather than off-site.

The increased provision of parking spaces was assumed to lead directly to an increase in HGV driver confidence in finding an available space. The driver survey reported that 77% of drivers felt more confident in finding a space and 85% felt that parking had improved at the lorry park they were using. The in-depth interviews indicated that some drivers felt that parking had become easier and more efficient. Some drivers may have also been aware of or used lorry parks that received funding from National Highways, which may have influenced their positive perceptions. However, an industry stakeholder interviewed estimated that England needed an additional 11,000 parking spaces to guarantee an HGV driver will get a secure space to park overnight. This figure is substantially higher than the shortfall indicated in the [National Survey of Lorry Parking \(2022\)](#), which reported a deficit of 4,473 spaces. The 2026 National Survey of Lorry Parking (not published at the time of writing) will provide a more up-to-date assessment of the shortfall.

There was **moderate evidence** and a **high level of confidence** to support the claim that the scheme contributed to achieving the **second order outcome** of increasing HGV driver confidence in finding a parking space.

There was **weak evidence** and a **low level of confidence** to support the claim that the scheme contributed to the second order outcome of HGV drivers now choosing to park at designated lorry parks. Industry stakeholders noted that drivers were often habitual in their behaviour, using the same lorry parks or off-site parking locations, with such habits challenging to change.

6.5.3 Confidence in manoeuvring vehicles within lorry parks

Contribution Claim 9: The provision of more designated/marked parking bays and wider marking within lorry parks, contributed to an improved confidence of HGV drivers to manoeuvre around sites.

A commonly reported concern by drivers within the in-depth interviews was the fear of being blocked in overnight by other vehicles. This was linked to the challenges of manoeuvring their vehicle within the lorry park due to the layout or space provided around designated parking bays (if they were marked out). The mechanism for this outcome was that improvements in the internal layout and marking of lorry parks would reduce conflicts between vehicles and HGVs parking in non-marked bays. It was also noted by DfT stakeholders that inefficient use of space, through poorly marked parking bays, often resulted in drivers choosing not to use a site that may have spaces available. Drivers were considered likely to perceive such sites as full because there was insufficient space to manoeuvre their vehicles.

Eighty-two percent of drivers surveyed felt they could manoeuvre their vehicle more easily following the scheme, with 82% also agreeing that parking bays were now more clearly marked. The in-depth interviews provided supporting evidence; drivers now felt they would not be blocked in by other vehicles overnight and consequently were able to have a better rest. The enhanced layout within lorry parks, as well as resurfacing to remove potholes, improved the efficient use of available space/bays,

and some drivers commented that this contributed towards improved road safety within the sites, reducing conflicts between vehicles and pedestrians.

There was **strong evidence** and a **high level of confidence** to support the claim that the scheme contributed to achieving the second order outcome of drivers having increased confidence when manoeuvring vehicles around the lorry park.

6.6 Removing barriers to using lorry parks

Contribution Claim 10: The range of improvements made at lorry parks removed or at least reduced the physical and perceived barriers to using lorry parks.

The investment in facilities, parking and security were designed to remove many of the physical and perceived barriers to using lorry parks, as set out in the third order outcomes within the scheme ToC. High awareness of improved facilities, security and parking, combined with strong satisfaction with amenities, indicated that the scheme was successful at removing many potential barriers for drivers. For example, in both the survey and in-depth interviews, HGV drivers reported that they felt safer at lorry parks following the improvements. The DfT stakeholders also felt that these improvements would be a strong incentive for drivers to use formal lorry parks rather than laybys.

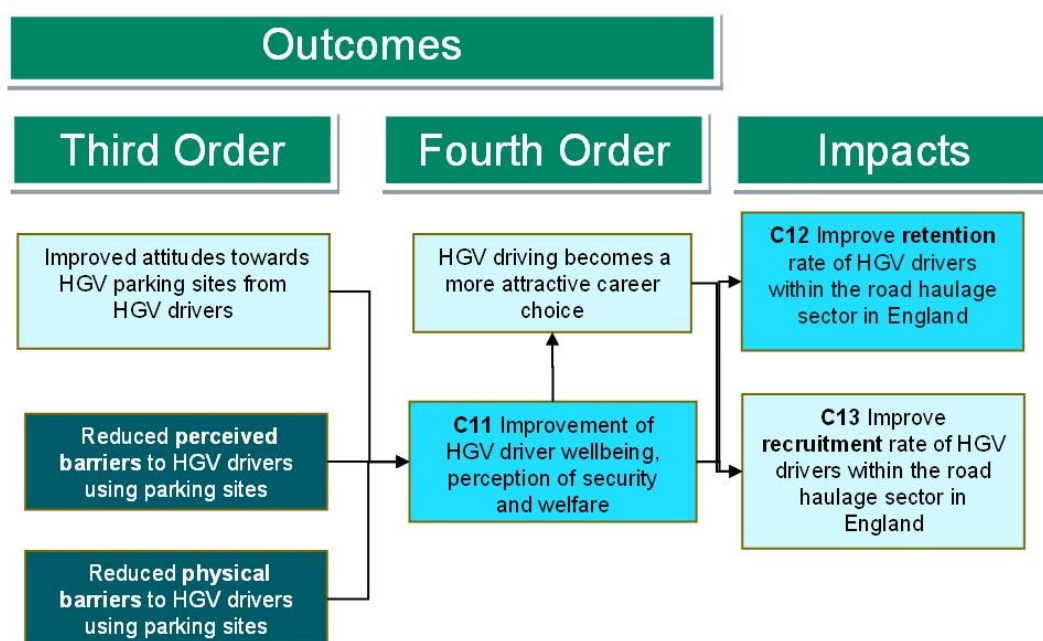
DfT stakeholders also noted that a range of external factors influence a driver's decision to use designated/formal lorry parks rather than laybys or street parking. These could include the cost of parking/food, company policies regarding reimbursements/insurance for secure loads, length of drive and location/convenience of specific sites. The evaluation data collection process did not explicitly consider these wider factors, although they surfaced within the in-depth interviews with drivers. Within the context of these wider external factors, the relative contribution of the scheme cannot be fully determined.

There was **strong evidence** and a **medium level of confidence** to support the claim that the scheme contributed to the third order outcomes of reducing the perceived and physical barriers to HGV drivers using parking lorry parks. The range of other potential funding/investment supporting improvements, and the site-specific barriers for each lorry park, need to be considered alongside the contribution of the scheme.

6.7 Driver welfare, retention and recruitment

The longer-term impacts of the scheme were targeted at improving HGV driver welfare, leading to higher levels of retention and recruitment (Figure 6.5). This was based on the expectation that investment to improve key services such as facilities, parking and security would remove many of the identified negative factors in HGV driver job satisfaction.

Figure 6.5 Driver welfare, retention and recruitment causal pathway



6.7.1 Driver wellbeing and welfare

Contribution Claim 11: Investment in facilities, parking and security lead to improved welfare and wellbeing amongst HGV drivers.

The scheme's ToC included a fourth order outcome covering HGV driver wellbeing and welfare, which was assumed to be a precursor to enhanced driver retention and recruitment. As noted above, it was concluded that many of the barriers to using lorry parks had been addressed at specific locations, contributing to the potential increased use of sites. The generally positive evidence presented throughout this section, from both the driver survey and in-depth interviews also supported the conclusion that the scheme had positively contributed to improving driver wellbeing and welfare. It was clear from driver in-depth interviews that the scheme had invested in improvements that were welcome by drivers, which made them feel valued and which would have improved their overall wellbeing. The quality of facilities, including cafés and showers, were particularly noted by drivers as enhancing the quality of their stops at lorry parks and security improvements contributed to perceptions of safety.

Evidence from the [Transport Focus Drivers' Facilities Survey \(2025\)](#) reported that nine out of ten drivers who rated security as good also reported being able to rest/sleep better. Whilst this evidence was collected from across a range of lorry parks in England, and not specific to the lorry parks supported by the scheme, it highlights the positive link between investment in security and aspects of driver welfare.

There was **moderate evidence** to support the claim that the scheme had positively contributed to the third order outcome of improving the wellbeing and welfare of HGV drivers. The evaluation was unable to include questions on this wider contextual outcome within the driver survey (due to the survey length and complexity of the topic), and so no direct evidence was available to corroborate evidence from the driver in-depth interviews. However, most of the preceding outcomes were achieved, so a **medium level of confidence** was allocated to the scheme having contributed to improving driver wellbeing. Industry stakeholders also noted that multiple factors will influence driver welfare and that the scheme's impact may take time to fully take effect.

6.7.2 Driver retention

Contribution Claim 12: The investment in facilities, parking and security lead to an increase in driver retention.

Whilst evidence from the in-depth driver and industry stakeholder interviews supported the conclusion that the quality of lorry parks contributed to driver retention, some interviewees noted that other external factors also influenced such decisions. External influences included driver pay, working conditions and being away from home. The evaluation also noted that HGV drivers wanted to feel valued, and improvements delivered through the scheme resulted in this being positively enhanced. Furthermore, the industry stakeholder interviews noted that the quality of lorry parks had a direct impact on driver stress levels and quality of rest (also reported by drivers within the in-depth interviews), which could also influence an individual's willingness to remain in the industry. HGV drivers noted that their job was a personal choice and something that fitted into their lifestyle and family commitments, and therefore the scheme's investment was one factor amongst many that influenced retention.

There was **moderate evidence** and a **medium level of confidence** to support the claim that the scheme has contributed, in part, to the increased retention of HGV drivers. However, it was not possible to isolate the contribution of the scheme from other investment and factors influencing retention, which resulted in the moderate confidence rating. The DfT noted, when reviewing the contribution claims, that fourth order outcomes may not be fully realised in the short term and are subject to a broader set of contextual influences compared to first and second order outcomes.

6.7.3 Driver recruitment

Contribution Claim 13: The investment in facilities, parking and security lead to an increase in driver recruitment.

Although there was moderate to strong confidence to support the claim that the scheme contributed to intermediate outcomes linked to improved recruitment of HGV drivers, the overall confidence to support this claim was low. Questions relating to recruitment were not part of the driver survey, due to the anticipated time-lag between lorry park improvements and any measurable impact on driver recruitment. As a result, insights on recruitment relied on the in-depth interviews with drivers and, particularly, industry stakeholders.

The view of industry stakeholders and drivers was that the facilities, parking and security at lorry parks were a lower priority for prospective HGV drivers, than pay, working conditions and being away from home. One HGV driver mentioned the costs

of insuring younger drivers and the excess on this insurance, as a barrier for employers. Similarly, there was a view among industry stakeholders that younger drivers would be less willing to stay at lorry parks overnight and increasingly sought greater flexibility within their working patterns.

There was **moderate evidence** and a **low level of confidence** to support the claim that the scheme had contributed to recruitment at this time. Further evaluation would be required to specifically consider the factors influencing recruitment and the contribution of the scheme, with a focus on operators and freight haulage recruitment teams.

6.8 Synthesis of the impact evaluation

This section synthesises the impact evaluation findings, structured around the evaluation questions outlined in Section 2. All conclusions should be interpreted in view of the limitations described in Section 3.5. This synthesis also needs to be considered in the context of the ToC and how far through individual causal pathways the scheme's influence would go within the evaluation timescales. As previously noted, the DfT highlighted that third and fourth order outcomes, alongside the identified impacts, may not be fully realised twelve months following the investment. Longer term changes are also likely to be influenced by a range of external contextual factors, which makes the contribution of the scheme more difficult to isolate.

- **What, if any, improvements in HGV parking capacity have been delivered through the MFGS?**

The scheme delivered parking-related improvements at 30 of the 70 lorry parks supported through the scheme. On the confirmed assumption that no operators removed parking spaces to introduce other facilities, the scheme therefore contributed to increasing the capacity of parking across lorry parks. This number recorded was subject to change, as some projects could have been re-instated following review. Furthermore, as the scheme progressed throughout its lifecycle, additional adjustments occurred, such as projects being added, amended, paused, or re-instated.

- **What, if any, improvements in HGV driver facilities have been delivered through the MFGS?**

Forty-six of the 70 lorry parks receiving funding from the scheme made improvements to facilities (toilets, showers, cafés and lounge/seating areas). Forty-one sites improved toilet facilities, 42 improved showers, 12 improved cafés and 23 improved lounge/seating areas. No audit was undertaken before and after the scheme to identify the change in the number of facilities. However, there was evidence from both the driver survey and driver in-depth interviews that the investment had improved the availability and quality of facilities.

- **What effect, if any, did these improvements to driver facilities have on the welfare of drivers using the lorry park?**

The evaluation found that the investment in lorry parking facilities contributed to HGV drivers being more satisfied with the quality of these facilities at lorry parks. The in-depth interviews with drivers noted that they felt more valued as a result of the scheme. Whilst there was moderate evidence of improvements in driver welfare, in part due to the time that such an outcome may take to materialise,

most outcomes that were assumed to lead into welfare had been realised. There was therefore moderate confidence that the scheme contributed to improving driver welfare.

- **What, if any, improvements in HGV driver and vehicle security have been delivered through the MFGS?**

Half of the 70 lorry parks made investments in security through the scheme, 24 invested in CCTV and lighting, with 17 investing in fencing and gates. Whilst no direct link could be made between this investment and lorry parks gaining Park Mark accreditation, there was consensus that the improvements had been made for both driver and vehicle security.

- **How much, if at all, did HGV drivers using the lorry park feel safer because of these improvements?**

The investment in security improved HGV driver perceptions of safety, both for themselves and for their vehicles/cargo. This was based on a relatively small sample of driver survey respondents. DfT stakeholders also noted that criminal gangs continue to target lorry parks across England but that the investments made had helped the sites that participated in the scheme to strengthen safety. Further analysis would be required to assess the impacts on freight crime and any displacement from lorry parks to other locations.

- **To what extent, if any, has MFGS encouraged current drivers to remain in post?**

HGV drivers reported that the improvements made through the scheme would most likely contribute to driver retention. However, they also noted that factors such as pay, working conditions and the long periods away from home were also important factors.

7. Implications for Future Policy Design

7.1 Introduction

This section summarises possible considerations for future lorry park policy design. References to the National Highways lorry parking scheme are included, although it was not evaluated.

7.2 Processes

The process-related recommendations worth further consideration within the future policy context are listed below.

Providing enhanced support with the application process to smaller operators

A significant portion of the funding from the DfT (and National Highways) was allocated to lorry parks operated by Moto, Roadchef and Welcome Break, resulting in many MSA lorry parks receiving funding. Noting that all eligible applications from all parts of the sector were funded by DfT, the scheme may therefore have benefitted larger operators, who have the capacity and resources to prepare funding applications more than small operators with more limited resources. Future match funding schemes could consider the benefits of targeting non-MSA operators.

Understand barriers for independent and single lorry park owners

The current evidence of barriers to accessing funding is provided by those who applied for scheme funding. Operators who did not apply were not within the scope of the evaluation. The appetite for funding across all types/sizes of operator and barriers to applying, could be further understood, through:

- Primary research to gather data on why some operators did not apply to the scheme to inform the approach to any future funding aimed at boosting response rates.
- Identifying ways to simplify and streamline the application and contracting processes, particularly for lower funding requests, to ease the administrative demands and improve accessibility to the scheme.
- Exploring strategies to reduce financial risk for operators, helping them navigate challenges like escalating raw material and labour costs.
- Targeting specific operators or locations who may be underrepresented or where there may be particular challenges, for example crime hot spots.

Understand unmet demand for lorry parks across the country

Further evaluation would be beneficial in regions across the country where off-site parking is notably high, to investigate the underlying causes: whether this is a shortage of available lorry parks, cost of parking or quality issues. This evidence could be used to formulate targeted grants or other interventions to encourage private sector investment in these areas. Further investigation could also be undertaken into industry claims of a 11,000 shortfall in parking spaces. The upcoming DfT National Lorry Parking Survey will provide some evidence in this area.

Further improvements at lorry parks that have already invested

Around half the lorry parks receiving funding focused their investment on only one category (facilities, security, parking or decarbonisation). The DfT (and National

Highways) now have an established contact database which could be used to maintain ongoing dialogue with operators and encourage future investment, particularly given the sector's low profit margins and limited cash flow.

7.3 Impacts

National Highways collaboration

Given that investment in HGV driver facilities has been funded by both the DfT and National Highways schemes, it will be beneficial to establish the impact of the total investment for the industry, lorry parks and drivers by aggregating monitoring and evaluation process and impact evidence. Considering the outcomes of investment across the industry could provide additional insights on what has worked, where and for whom, and identify priority areas for future investment.

Minimum standards

Feedback from industry stakeholders and drivers highlighted an inconsistency in standards between lorry parks in terms of facilities, with lower standards of provision considered to influence driver wellbeing. Establishing a comprehensive formal minimum standard, building on the Park Mark, could allow drivers to confidently choose alternative lorry parks when their preferred location is full. However, introducing a minimum standard could also have an unintended consequence of driving some providers out of the market if they felt unable to make the investment to meet the standard, further reducing an already inadequate supply of lorry parking. In addition, implementing minimum standards would likely require legislation and an enforcement and compliance regime to be set up at considerable cost.

Examples of available standards are:

- European Standard for Safe and Secure Truck Parking Areas, developed by the EU but not adopted in England, <https://eu-parkings.eu/>. This covers facilities, parking and security.
- Transport Asset Protection Association (TAPA), which has a focus on security, not facilities or parking. See: <https://tapaemea.org/members/parking-place-operators/>
- Park Mark Freight, which the RHA referred to during their interview and it is an award given to lorry parks who meet their security, parking and facility requirements. See: <https://www.britishparking.co.uk/park-mark-freight>

Future impact evaluation

The third order and fourth order outcomes relating to driver attitudes, wellbeing and retention/recruitment require time before they can be evaluated. Further, targeted, evaluation would also be needed to consider these outcomes, alongside the use of any secondary data, such as crime or recruitment statistics. The following sources could be used to assess these outcomes:

- A wave of the DfT lorry parking audit to measure any reduction in the number or proportion of vehicles parked off-site overnight which AECOM are already planning with the DfT. See <https://www.gov.uk/government/publications/national-survey-of-lorry-parking-part-one-2022>
- NaVCIS data to inform if crime rates are decreasing and measure any impact on organised freight crime. See: <https://navcis.police.uk/freight/>

- Evaluate whether the initial improvements have withstood time and whether the driver experience has been maintained. Use of Transport Focus HGV driver experience data would enable regular monitoring of lorry parks. See: <https://transportfocusdatahub.org.uk/>

Appendix A Theory of Change summary

	Aspect
Strategic Case	Provide the opportunity to match fund lorry park operator investment, to improve the provision and quality of facilities at lorry parks
Inputs	Total investment in the scheme and match funding from operators
Activities	Funds released to operators Cross government engagement Communication plan to publicise scheme/s Application assessment and notification of award to operators Investments informed by research
Outputs	Provision of additional parking spaces and bays marked out Resurfacing of parking areas New and enhanced facilities for drivers e.g. showers, seating New and improved security measures e.g. CCTV and fencing
Outcomes	The provision of new and enhanced facilities for drivers underpinned improvements in their satisfaction when stopping at lorry parks. Understanding driver awareness of recent investment to underpin their perceptions of the quality and provision of facilities. The provision of additional parking spaces and improved surfacing was targeted at removing the physical barrier to drivers using specific lorry parks enabling them to select lorry parks based on location rather than the ability to secure a parking space. Making drivers feel safer is central to making the career more appealing and retaining existing HGV drivers. Enhanced fencing may also improve the perception of lorry parks within the wider communities and reduce their attractiveness to thieves. Improving the general welfare for HGV drivers and enhancing driver experience leading to an enhanced experience and perception of wellbeing and value in the industry. An increased awareness across the industry of the importance of investment in facilities on driver welfare leading to wider investment and potentially increased private sector investment. All factors will contribute to driver welfare, retention and the potential recruitment of new HGV drivers.
Impacts	A fundamental medium to long term objective of the scheme was to contribute towards increasing the retention of drivers in the industry and making the career more attractive for others. Further private sector investment as a potential longer-term impact.
Disbenefits	The relocation of crime resulting from enhanced lorry park security. This could particularly affect security for drivers spending the night in informal parking spaces such as industrial parks. Facilities need to be maintained otherwise the risk of them falling into disrepair and undermining the positive changes increases.
Contextual Factors	The wider economy remains suppressed, meaning that wages are not keeping pace with inflation. This could unduly influence the attractiveness of HGV driving. Despite Brexit there remains a high number of international drivers using the UK's road network and HGV lorry parks.

Appendix B Process evaluation

B1 Sample

The process evaluation sample was designed to achieve a balance across both windows one and two, as well as the type/value of improvements being made. The final sample was influenced by the availability of individual operators and their willingness to be interviewed. The final split of process evaluation interviews was:

- Four who had applied for funding in both window one and two.
- Five who had applied for funding in window one only.
- Six who had applied for funding in window two only.

B2 Discussion Guide

Introductory questions (5 mins)

To give us a feeling for the type of organisation that operates your site:

1. Can you give me a broad indication of the size of your organisation:
 - a. How many sites do you operate?
 - b. How many staff do you employ?
2. If more than one location, what geographic area/s do you cover?
3. Does your company own or lease the site?
4. Within your organisation, where does responsibility for completion and submission of funding applications lie, i.e. do you have designated staff resource for this?

INFORMATION TO CAPTURE:

Who are you, what is your role, tell me about the company

Window 2 only: Previous applications

5. Did you apply for funding under Window 1, and if so, were you successful?

If yes:

6. To what extent, and how, did this influence your decision to apply for Window 2?

If no:

7. Why didn't you apply?

PROBE:

- a. Financial reasons
 - b. No improvement needs
 - c. Wasn't aware of it / Wasn't confident in applying / Didn't think we'd be successful
 - d. Other reasons
8. And why did you apply in window two?

INFORMATION TO CAPTURE:

Why didn't you apply in window one? Why did you apply in window two

Awareness of the fund and motivation to apply (5 mins)

9. How did you become aware of the funding opportunity?

[Probe to understand whether initial contact / dissemination of information could be improved.

Note to moderators: c300 of the sites who were informed about Window 1 did not apply]

- a. Could publication channels be improved for future opportunities? What channels would be most effective?

10. What motivated you to apply for MFGS funding:

PROBE

- a. Feedback from drivers
- b. Return on investment / only able to afford improvements with MFGS
- c. The type of improvement targeted
- d. The opportunity to receive match funding

Window 2 repeat applicants only:

11. Was there any change in motivation compared with Window 1?

INFORMATION TO CAPTURE:

How did you hear?

Which communication channels?

What could be improved to increase awareness?

Barriers to applying and potential reasons for not applying (5 mins)

12. How did you decide to apply for funding:

- a. Was the decision to apply straightforward and if not, which factors influenced this decision?
- b. What factors influenced your approach to applying for funding?
- c. Did you consider not applying for funding, and if so, why?
- d. Were there any barriers to applying?
 - i. If yes, what were they?
 - ii. How did you overcome them?

PROBE: With help or support from DfT?

- If yes, what type of support
- If no, were they aware support was available

Window 2 only:

13. Did this change compare with Window 1, and if so how?

INFORMATION TO CAPTURE:

Motivation for applying

Any doubts / barriers to application?

How were these overcome?

What could DfT improve support, reduce barriers?

Application process (15 mins)

14. To what extent were the criteria for funding site improvements appropriate to your needs, including:
- Who can apply.
 - Type of improvement / facilities covered.
 - Could any changes be made to the funding criteria to better target your intended outcomes?
 - Are you aware of any key gaps in driver requirements that were not targeted by the fund?
 - If available, what would you like to see funded in the future?
 - Funding amount and payments process.
15. What was your view of the application process, overall and specifically the information available, for example:
- Was the information clear and easy to understand and easy to read, could it have been improved?
 - Did the information cover all your requirements? What, if anything, was missing?
 - Were examples clear, could they have been improved?
 - How was the level of detail required as evidence (suitable /straight forward /too much unclear)
 - Did you seek help or support from DfT?
 - If yes, was this beneficial
 - If no, were you aware of the help and support
 - What benefit, if any, did site visits by DfT have in the process?
16. What changes would you make to the application process and why?
17. What was your view of the timing of the funding opportunity and the timescales. Is any change required?
- The timing when the fund was launched, and length of the funding window.
 - Timescales for submitting the application.
 - Timescales until a decision was received.
 - Timescales for the implementation.
18. Is there any other way the DfT / Government could assist you in providing a better service / improved facilities to drivers other than funding?

Window 2 repeat applicants only:

19. Was the application process easier / more difficult compared with Window 1 and if so how?
- Criteria e.g. financial evidence; reduction from three to two years
 - Information and support
 - Submission requirements
 - Timescales

INFORMATION TO CAPTURE:

Was the criteria clear and easy to provide evidence?

Were the improvement options suitable for the needs of the site / drivers?

Was the information provided about 'how to apply' easily available and clear?

Timescales for applying achievable?

Planning?

What could DfT to improve the process?

Improvement Works (5 mins)

20. What were the main outcomes targeted through the specific investment made e.g. improved security, HGV driver welfare etc?

- a. To what extent did your proposed improvements complement existing site improvement work, or encourage you to deliver additional site improvement .g. were the works completely separate or complementary?

- i. Did the MFGS complement the current offer e.g. add CCTV to fencing

PROBE:

Did MFGS mean multiple improvements could be made

- Did this save money (economies of scale)
 - Was the site able to achieve multiple improvements with the same level of disruption as one improvement
- b. To what extent did the MFGS unlock existing improvement plans that could not have been funded otherwise?
- c. At those sites that received MFGS funding, what other work has been completed in the last 2 years?
- d. How were such works funded?
- e. To what extent did the MFGS funded work support this previous investment e.g. were the works completely separate or complementary?
- f. What other funding opportunity did you apply for in the last two years, and how successful were you?

INFORMATION TO CAPTURE:

Motivation to improve the site?

Would you have done this anyway? Or did you need the funding? Or did the funding push the improvement?

What did you achieve / deliver?

Delivery (moderator to ask subsections as appropriate to respondent)

MODERATOR TO REVIEW INTERVIEW LENGTH: IF RUNNING OVER TIME CHECK WITH RESPONDENT ABOUT THEIR AVAILABILITY. IF THE RESPONDENT IS TIGHT FOR TIME, FOCUS ON LEARNINGS, MAIN CHALLENGES AND FURTHER SUPPORT (Q21, Q23, Q27)

Window 1 Delivery Complete (15 mins)

21. What learnings are there from the delivery of the MFGS that could inform future iterations of the fund, or similar funds?
 - a. How well was the process following funding confirmation managed?
 - b. What changes, if any, would you make to the funding confirmation / award process and why?
22. How did you find the engagement with the DfT and monitoring / progress reporting requirements, during delivery?
23. What were the main challenges, if any, in delivering scheme for which match funding was received

PROBE:

- a) human resources,
 - b) concerns with potential delays,
 - c) procurement of contractors,
 - d) sourcing quotes
 - e) generating cost estimates
 - f) having funds to commit
 - g) planning permission
24. What were the main risks identified at the start of the delivery period?
 - a. Which of these materialised?
 - b. Which mitigation activities were successful in addressing potential risks, and why?
25. Was the work delivered with outputs as planned, to time and budget, and if not, why not?
26. How was the delivery of the scheme managed e.g. by whom? How did the delivery progress and what changes would you make to your delivery process in the future?
27. What further support would site operators have benefited from during the scheme implementation?
28. Did you seek additional support, and from whom?

INFORMATION TO CAPTURE:

What difficulties with delivery?

Did DfT help / support? Could DfT have done more?

Did / could a freight organisation help/support

Unlocking funds

Unlocking planning permission

Timing of DfT responses

Invoicing- time lag

What would you have done differently, what else could DfT have done?

Window 1 Delivery Delayed (20mins)

29. What learnings are there from the delivery of the MFGS that could inform future iterations of the fund, or similar funds?
 - a. How well was the process following funding confirmation managed by DfT?
 - b. What changes, if any, would you make to the funding confirmation / award process and why?
30. Understand the improvements have been delayed. What was the cause of the delay?
31. At what stage in the development of the improvements did the issues causing the delay arise?
32. Did the issues arise in connection with a specific aspect of the improvements, or were they general?
33. Is there any external support or information that DfT or other organisation could have provided to:
 - a. Help identify and resolve these challenges earlier?
 - b. Assist unblocking them once they arose?
34. Is there any change that could be made to the terms of the fund that could have helped pre-empt or mitigate the delay?
35. What is the estimated duration of the delay?
36. Was there any change to the planned outputs?
37. What was the wider impact of the delay on the improvement project and customers?
38. What other challenges were there, if any, in delivering a scheme for which match funding was received?

PROBE:

- a) human resources
 - b) concerns with potential delays
 - c) procurement of contractors
 - d) sourcing quotes
 - e) generating cost estimates
 - f) having funds to commit
 - g) planning permission
39. What were the main risks identified at the start of the delivery period
 - a. Which of these materialised?
 - b. Which mitigation activities were successful in addressing potential risks, and why?
40. How was the delivery of the scheme managed e.g. by whom? How did this delivery activity progress and what changes would you make in future?

Window 1 / No progress (10 mins)

41. What were the key factors that stopped you completing contracts / the improvements going ahead, once funding approval had been received?
 - a. At what stage did these issues arise?
 - b. Is there any external support or information that DfT or other organisation could have provided to unblock progress?

- c. What is the longer-term impact on your improvement plans?

Window 2 Improvements ongoing or complete (20 mins)

42. What learnings are there from the delivery of the MFGS to date, that could inform future iterations of the fund, or similar funds?
- a. How well was the process following funding confirmation managed by DfT?
 - b. What changes, if any, would you make to the funding confirmation / award process and why?
43. How did you find the engagement with the DfT and monitoring / progress reporting requirements, during delivery?
44. Was the work delivered to time and budget and with outputs as planned, and if not, why not?
- a. What aspects of the delivery were impacted, and how?
 - b. Is there any external support or information that DfT or other organisation could have provided to help identify and resolve those challenges?
 - c. Is there any change that could be made to the terms of the fund that could have helped mitigate these issues?
 - d. What was the wider impact on the improvement project to customers?
45. What other challenges were there, if any, in delivering a scheme for which match funding was received e.g. human resources, concerns with potential delays, procurement of contractors, sourcing quotes and generating cost estimates, having funds to commit, planning permissions?
46. What were the main risks identified at the start of the delivery, and which of these materialised?
- a. Which mitigation activities were successful in addressing potential risks, and why?
47. How was the delivery of the scheme managed e.g. by whom? How did this delivery activity progress and what changes would you make in future?
48. What further support would you have benefited from during the scheme implementation?
49. Did you seek additional support, and from whom?

Window 1 and 2 successful applicants only:

50. How did the delivery process differ from your experience during Window 1?

PROBE:

- a. Any differences when managing challenges and risks
- b. Any differences in the engagement with DfT including any help and support

INFORMATION TO CAPTURE:

As window one: may answer about current process if work is in progress

How did window one / two delivery compare, for those in both windows?

Window two to window one: lessons learned by those who applied in both windows

Appendix C Information about industry stakeholders interviewed for the evaluation

Stakeholder	Role and remit	Interest in MFGS
Road Haulage Association	The Road Haulage Association is a member-led trade association supporting people and businesses in the road transport industry. Have 8,500 members, ranging from owner operators to those with fleets of over 1000 vehicles.	The RHA have collaborated with the DfT and helped shape the scheme, and they want to ensure it is focused on welfare from the drivers' point of view, as well as addressing and trying to improve on driver retention after coming out of the driver shortage.
Logistics UK	Logistics UK is one of the biggest business groups in the UK, representing the entire industry, with members from the road, rail, sea and air industries. Represent around 20,000 different operators in logistics.	To ensure it delivers on increasing the quantity and quality of parking provision within the industry. They believe parking issues significantly impact driver retention and recruitment, and so investment is important to address and improve this.
Chartered Institute of Logistics and Transport	Chartered Institute of Logistics and Transport (CILT) (UK) is the chartered body for professionals involved in the movement of goods and people and associated supply chain networks. Have a membership of over 13,000 logistics, transport, and supply chain professionals.	They consider HGV drivers to be integral to UK infrastructure and the economy, so they are interested in how drivers are treated and the conditions they are working in.
Unite the Union	Unite the Union is a democratic and campaigning union, which fights back for employees in the workplace, protects workers' rights and takes trade unionism out to millions of unorganised workers. Represent thousands of members across the transportation sector, including HGV drivers and other professional drivers.	To ensure funding is being spent appropriately and on things that drivers want. They support investment being made to improve facilities for drivers.
Mates in Mind	Mates in Mind is a leading UK charity raising awareness and addressing the stigma of poor mental health. They promote and lead on the development of positive mental wellbeing within the workplace, working with organisations and industries.	To ensure the mental health of drivers are being considered and improved, including the provision and quality of facilities and how these impact drivers. They want to work more with the sector and organisation to make the relevant interventions.

Appendix D Impact evaluation questionnaire

DfT Match Funding Grant Scheme Questionnaire

Revision History

Revision	Revision date	Details	Authorised	Name	Position
1	21/05/24	Revised following cognitive interviews	Neil Rogers	Neil Rogers	Project Manager
2	15/05/25	Revised for phase 2 of project	Neil Rogers	Neil Rogers	Project Manager

AECOM designed the survey questionnaire in collaboration with the DfT. The questionnaire was tailored to ensure respondents were only asked about the improvements made at the lorry park they visited. The questionnaire largely remained consistent across both phases of the evaluation, enabling data to be aggregated across all lorry parks. A few additional questions were included in phase two.

Information to collect before the survey begins:

Name of site

QSITE, SINGLE CODE

1. Site one
2. Site two
3. Site three
4. etc

INTRODUCTION

Good morning / afternoon,

Will you help us improve the experience for lorry drivers by giving us your feedback about this site through a simple 10-minute survey?

The survey is being conducted by AECOM, an independent research company, on behalf of the Department for Transport (DfT), the government department responsible for planning and investing in transport in the UK.

The survey will be carried out according to the Market Research Society's Code of Conduct and Data Protection Laws and all data you provide is held securely. Your answers will be anonymous and combined with other responses in a report to the DfT.

For taking part, with your consent, we will enter you in a prize draw to win one of five prizes of £100 in high street shopping vouchers.

Participation in the survey is entirely voluntary.

Record agreement to proceed or otherwise

QCONTINUE

Yes, will be interviewed

No, do not want to be interviewed **THANK THE RESPONDENT AND CLOSE THE SURVEY**

Language the driver would like to use to complete the survey

QLANGUAGE, SINGLE CODE

1. English
2. Polish
3. Romanian
4. Bulgarian
5. Hungarian

TIME STAMP

Add time stamp to confirm the start time for the interview

ASK ALL, SINGLE CODE

Q1. First we'd like to ask you about your journey today and your visit to this site. When was the last time you visited this site before today?

PLEASE CHOOSE ONE

1. Within the last week
2. Longer than a week ago but within the last month
3. Longer than a month ago but within the last 6 months
4. Longer than 6 months ago but within the last year
5. Longer than a year ago but within the last 2 years
6. More than 2 years ago
7. Never visited before
8. I can't remember

ASK IF VISITED IN THE LAST YEAR (Q1= CODE 1,2,3,4) SINGLE CODE

Q2. Typically, how often do you visit this site?

PLEASE CHOOSE ONE

1. 5 times a week or more
2. Once a week, at least, but not five times a week
3. Once a month, at least, but not once a week
4. Once every three months at least, but not once a month
5. Once every six months at least, (twice a year) but not once every three months
6. About once a year
7. I can't remember

PHASE 2 OF INTERVIEWING

ASK IF QSITE=2 OR 5 OR 8 OR 11

Q2A Did you visit this site before [punch in completion date]

1. Yes
2. No
3. Don't know

ASK ALL, MULTI CODE

Q3. Which of these have you already used today?

PLEASE CHOOSE ALL THAT APPLY

1. Toilets
2. Showers
3. Café / restaurant
4. Lounge / seating areas
5. None of these **EXCLUSIVE**

RATING OF FACILITIES

ASK ALL,

SINGLE CODE FOR EACH ROW

SHOWCARD

Q4 Using a scale from 1 to 10 where 1 is very poor and 10 is very good, how would you rate the following:

PLEASE CHOOSE ONE

ANSWER OPTIONS. SHOW A 1 TO 10 SCALE WITH LABELS TO SHOW WHAT EACH NUMBER REFERS TO

Very poor = 1 or 2

Fairly poor=3 or 4

Neither good nor poor=5 or 6

Fairly good=7 or 8

Very good=9 or 10

Don't know

Did not use **DO NOT SHOW, AUTO-SELECT IF NOT USED ON THE DAY**

ROWS

Topics (not shown)	Feature to rate
Parking	Availability of parking Surface quality in the parking area Value for money for parking How well the parking area is managed
Security	Vehicle security, including of your load Personal security
Toilets	The number of toilets available
Only show if used today	How clean the toilets were
Showers	The number of showers available
Only show if used today	How clean the showers were
Lounge or rest area	Lounge / seating / rest areas where drivers
Only show if used café or lounge	eat food and / or relax

UNPROMPTED

ASK IF VISITED IN THE LAST YEAR (Q1= CODE 1,2,3,4) AND DRIVERS ANSWERING IN ENGLISH (QLANGUAGE=1)

Q5a. You said you visited the site previously, what changes, if any, have you noticed at this site since the end of March?

INTERVIEWER INSTRUCTION: DO NOT PROMPT

1. Toilets updated (refurbished) or new
2. Showers updated (refurbished) or new
3. Café restaurant updated (refurbished) or new
4. Lounge / seating area updated ((refurbished) or new
5. CCTV is new / more cameras
6. Lighting updated or new
7. Security fence updated or new
8. Security gate updated or new
9. Automatic Number Plate Recognition system is updated or new
10. Security people on site / more people on site
11. Parking surface updated (refurbished) or new
12. Parking bay marking (white lines) is updated (refurbished) or new
13. Parking signage is updated (refurbished) or new
14. More parking spaces than before
15. Other (please specify)
97. No changes noticed **EXCLUSIVE**
98. Can't remember **EXCLUSIVE**

ASK DRIVERS WHO HAVE VISITED THE SITE BEFORE (Q1=1) AND THEY ARE ANSWERING IN ANY LANGUAGE EXCEPT ENGLISH (QLANGUAGE=2,3,4,5)

Q5b You said you visited the site previously, what changes, if any, have you noticed at this site since the end of March?

Please write in below. If there are no changes write “none” in the first box and select next to continue

10 SMALL OPEN TEXT BOXES

TOILETS AND SHOWERS

ASK IF SITE HAD TOILET AND SHOWER IMPROVEMENTS AND VISITED THE SITE IN THE LAST YEAR (Q1=1 TO 4) AND WERE UNAWARE OF THE CHANGES UNPROMPTED (Q5a DID NOT = CODES 1 OR 2)
SINGLE CODE

Q6. This site had changes made to their toilets and showers, with work completed around March 2024. Now I mentioned it, have you noticed this?

1. Yes
2. No
3. Don't know

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q6)
SINGLE CODE PER ROW
SHOWCARD COLUMNS

Q7. How would you rate the updated toilets and showers compared to before the changes were made for?

Row

Number of toilets available

Number of showers available

Feeling modern and fresh

Feeling safe while in the toilet / shower block

Available soap dispensers

Working hand driers

A place to hang clothes while in the shower

A place to put shower gel or soap while showering

Quality of the showers

PHASE 2 OF INTERVIEWING: Water temperature of the showers

PHASE 2 OF INTERVIEWING: Water pressure of the showers

The amount of space in the shower cubicle

A place to sit down before and after a shower

Ventilation in the shower

Lighting in the toilet / shower block

Column

Improved a lot

Improved a little

Remained the same

Become a little worse

Become a lot worse

Don't know / can't remember

Never used

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q6)
OPEN TEXT

Q8. Is there anything else you'd like to comment about the changes to the toilets and / or showers at this site?

CAFÉ / LOUNGE

ASK IF SITE HAD CAFÉ / LOUNGE IMPROVEMENTS) AND VISITED THE SITE IN THE LAST YEAR (Q1=1 TO 4) AND WERE UNAWARE OF THE CHANGES UNPROMPTED (Q5a DID NOT = CODES 3 OR 4) SINGLE CODE

Q9. This site had changes made to their café, lounge or seating area recently, with work completed around March 2024. Have you noticed this?

1. Yes
2. No
3. Don't know

PHASE 2 OF INTERVIEWING

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q9)

SINGLE CODE

SHOWCARD

Q10A Which of the following statements do you agree or disagree with about changes to the café, lounge or seating area?

Row:

The seating area is more comfortable
The quality of food has improved
The choice of food has improved
The speed of service has improved
Value for money has improved
There is more opportunity to chat to other drivers than before

Column:

Strongly agree
Agree
Neither agree nor disagree / changes made no difference
Disagree
Strongly disagree
Don't know

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q9)

SINGLE CODE

SHOWCARD

Q10. Overall, how would you rate the updated café, lounge or seating area here compared to before the changes were made.

Improved a lot
Improved a little
Remained the same
Become a little worse
Become a lot worse
Don't know / can't remember
Never used

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q9)

OPEN TEXT

Q11. In your own words, what benefits, if any, do you feel these changes will have for you and other drivers?

SECURITY

ASK IF SITE HAD SECURITY IMPROVEMENTS AND VISITED THE SITE IN THE LAST YEAR (Q1=1 TO 4) AND WERE UNAWARE OF THE CHANGES UNPROMPTED (Q5a DID NOT = ANY OF 5,6,7,8,9)

MULTI CODE

Q12. This site had changes made to their security, with work completed in March 2024. Have you noticed the following?

Interviewer read out the list / Please select all that apply

CCTV

Lighting outside

Security fence

Security gates

Automatic Number Plate Recognition (ANPR) cameras

None of these **EXCLUSIVE**

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q12)

SINGLE CODE PER ROW

SHOWCARD COLUMNS

Q13. Which of the following statements do you agree or disagree with about changes to the site?

Row

Lighting outside makes me feel secure when walking around the site

Lighting outside makes me confident about the security of my vehicle and its load

Security gates helps me feel more confident about the security of my vehicle and its load

Security fencing helps me feel more confident about the security of my vehicle and its load

CCTV makes me more confident about the security of my vehicle and its load

Automatic Number Plate Recognition (ANPR) makes me more confident about the security of my vehicle and its load

Column

Strongly agree

Agree

Neither agree nor disagree / changes made no difference

Disagree

Strongly disagree

Don't know

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q12)

SINGLE CODE PER ROW

SHOWCARD COLUMNS

Q14. Overall, how would you rate your vehicle and personal security at this site compared to visits before 2024?

Row

Vehicle security

Personal security

Column

Improved a lot

Improved a little

Remained the same

Become a little worse

Become a lot worse

Don't know / can't remember

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q12)

OPEN TEXT

Q15. Is there anything else you'd like to comment about the changes in security at this site?

PARKING

ASK IF SITE HAD PARKIN PARKING IMPROVEMENTS AND VISITED THE SITE IN THE LAST YEAR (Q1=1 TO 4) AND WERE UNAWARE OF THE CHANGES UNPROMPTED (Q5a DID NOT = ANY OF 11,12,13,14) MULTI CODE

Q16. This site had changes made to their parking, with work completed in March 2024. Have you noticed changes to the following?

Parking surface

Number of parking spaces

Signage

Parking bay markings

None of these **EXCLUSIVE**

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q16) SINGLE CODE PER ROW

Q17. Which of the following statements do you agree or disagree with about changes to the site?

Row

I am more confident about finding a parking space at this site nowadays

The road surface in the parking area has improved at this site

I am able to manoeuvre my vehicle more easily at this site nowadays

The parking bays are more clearly marked out nowadays

Column

Strongly agree

Agree

Neither agree nor disagree / changes made no difference

Disagree

Strongly disagree

Don't know

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q16) SINGLE CODE

Q18. Overall, how would you rate your experience parking your lorry at this site compared to visits before 2024?

Improved a lot

Improved a little

Remained the same

Become a little worse

Become a lot worse

Don't know / can't remember

ASK IF AWARE OF CHANGES UNPROMPTED (Q5A) OR PROMPTED (Q16) OPEN TEXT

Q19. Is there anything else you'd like to comment about the changes to parking at this site?

ASK ALL SINGLE CODE

Q20. Which of these possible improvements would you prioritise at other sites if you could only select one?

Security

Toilet and shower

Parking

Café

Lounge / seating area

Other (please specify)

ASK ALL
OPEN

Q21. Why did you say (INPUT FROM Q20) is the priority?

ASK ALL
OPEN

Q22. Is there anything else you'd like to tell us about the facilities at this site, including:

- Comparisons with previous visits
- Comparisons with other sites

If you do not have anything to add, write none in the box and select next.

Profiling and employment

ASK ALL
SINGLE CODE

Q23. Finally a few questions about you and your work. Are you...

PLEASE CHOOSE ONE

1. Male
2. Female
95. Prefer another term
99. Prefer not to say

ASK ALL
SINGLE CODE

Q24. How old are you?

PLEASE CHOOSE ONE

1. 18 to 24
2. 25 to 34
3. 35 to 44
4. 45 to 54
5. 55 to 64
6. 65 to 74
7. 75 +
99. Prefer not to say

ASK ALL
SINGLE CODE

Q25. How long have you been a lorry driver?

PLEASE CHOOSE ONE

1. Less than a year
2. 1-4 years
3. 5-9 years
4. 10-19 years NOT SHOWN IF 18 TO 24
5. 20+ years NOT SHOWN IF 18 TO 34

ASK ALL
SINGLE CODE

Q26. Do you live in the UK or somewhere else?

PLEASE CHOOSE ONE

1. UK (England, Scotland, Wales, Northern Ireland)
2. Somewhere else (please specify)

Closing section: Quality and prize draw

**ASK ALL
SINGLE CODE
QPRIZE DRAW**

We would like to enter you in to the prize draw to win one of five £100 High Street shopping vouchers. To take part, we would need your name, telephone number and email address.

Would you like to be entered in to the prize draw?

PLEASE CHOOSE ONE

1. Yes
2. No

**ASK ALL
SINGLE CODE
QBACKCHECK**

We would also like to contact a proportion of participants to check this survey was completed to your satisfaction and the interviewer followed the correct procedures.

Do you consent for us to recontact you by telephone for back checking purposes?

PLEASE CHOOSE ONE

1. Yes
2. No

**ASK IF PRIZE DRAW OR BACK CHECK IS YES
SINGLE CODE
OPEN**

ONLY FORCE NAME

Please give your preferred contact details below and we will only use them for the purposes you have agreed to.

1. Name (FIRST NAME OR INITIAL AND SURNAME)
2. Telephone number (MUST BE GIVEN FOR BACK CHECK)
3. Email (OPTION FOR PRIZE DRAW IF DRIVER DOES NOT WANT TO GIVE PHONE NUMBER)

THANK AND CLOSE SCREEN: NON ENGLISH SPEAKERS

Thank you for your help with this survey. We really appreciate it.
Please give the tablet back to the interviewer.

THANK AND CLOSE SCREEN: ALL

Thank you for your help with this survey. We really appreciate it.

Interviewer submit survey.

INTERVIEWER: Hand respondent thank you leaflet

INTERVIEWER NOTE: If you are running low, please contact the office asap, to receive more

Appendix E HGV Driver discussion guide

Introduction (2 mins)

- Introduction on yourself: A researcher from AECOM who is an independent consultancy working on behalf of the Department for Transport (DfT).
- The purpose of the interview is to understand drivers' experience and their thoughts about the facilities at this site.
- We want to hear your opinions. There are no right or wrong answers.
- Any information you provide will be treated in the strictest of confidence, and our research findings will be anonymized and aggregated for reporting.
- Do you consent to this session being audio-recorded purely for our accuracy of reporting? The recording will not be passed on to DfT.
- It would be good to walk around and look at the facilities at the site while discussing them, if you are happy to.
- Interview should take 45 to 60 minutes.

Driver introduction (2 mins)

Invite the driver to introduce themselves. To include:

- Name
- Number of years driving
- Self-employed or employed
- Regions of the UK they drive around
- Whether they ever drive abroad (continental Europe)

Typical experience at a truck stop (5 mins)

- To begin with, it would be interesting to hear what you think about truck stops in general, not just this site.

PROBE:

- What makes a 'good' truck stop "good"
- What makes a 'poor' truck stop "poor"

- What impact does a 'poor' truck stop have on drivers

PROBE:

- Long term motivation to work as a driver
- How does it make drivers feel they are viewed by members of the public

- Do you ever stop over night at truck stops?

If yes:

- What features of the stop are most important to you when stopping over night?
- What features at a stop need improving, generally?

PROBE (expected possible responses).

Moderator to build a list of priorities for both importance and need improving, driver may list features which then need to be put in order once all listed.

PARKING

- Parking cost
- Parking space available
- Parking bay location e.g. away from refrigerated lorries / close to toilets and showers / so it's easy to drive off effortlessly when leaving

SECURITY

- Vehicle security
- Personal security

WELFARE:

- Food (quality, choice, cost)
- Quality and cleanliness of toilets / showers
- People (staff, other drivers they know here)
- Lounge area

Changes observed at the site today / recently (10 mins)

- Why did you choose this site rather than another one in the area?

PROBE:

- Reasons they chose this site, was it a conscious choice or convenience?
- Was this the first choice, if not, what was and what facilities did the first choice offer? Why could they not stop at their first choice?
- How far out of their way did they drive to this site?

- Are you aware of any recent changes that have been made to this sites' facilities?

Recent: is approximately the end of March 2024, if clarification is needed

PROBE:

- If yes, what changes are you aware of?
 - Parking
 - Toilet
 - Shower
 - Café
 - Lounge / seating area
 - Anything else?

- Were you aware of these before visiting the site today?
 - If yes, how were you **first made** aware?

PROBE:

- Been to the site recently and seen them myself
- Word of mouth: other drivers
- Online information

- Were you aware of changes being made to the site before or while they were in progress? If yes: How do the changes compare to your expectation?
- Were the changes a factor in you choosing to visit the site today?

Offer to walk around the site with the driver for any of these two reasons:

1. They have not noticed ALL or ANY changes
2. The driver wants to describe a benefit of a change and it's easier to describe this visually than using words

Following any walk through: Moderator to summarise what has been discussed once seated, in case recording does not clearly capture discussion outside.

SPECIFIC CHANGES: Parking (5 to 10 mins)

We have mentioned changes made to parking at this site.

- What are your thoughts about parking at this site nowadays?

PROBE FOR THOUGHTS ON:

- Parking capacity
- Cost and value for money
- Surface quality
- Parking bay markings
- Parking bay sizes
- Signage and accessibility
- Anything else

- How does parking compare to your previous visits?

PROBE:

- Better
- No change
- Worse
- **Why do you say this?**

- What benefits, if any, do you feel the changes to the parking will have on you and other drivers?

- PROBE:

- More spaces, easier to park
- Easier to manoeuvre the vehicle
- Less or no potholes, better for the vehicle

- How does your experience of the changes to the parking area influence whether you will stop at this site again in the future, assuming you're in the area?

- PROBE:

- Likelihood

Will you choose this site over others in the area due to parking in the future?

- If yes, why?; If no, why?

- Are there any more changes that could be made to the parking at this site?

- If yes:
 - What are these?
 - If these changes were made, how would it influence your likelihood of visiting the site again?
- Which, if any, of these changes to parking would you recommend other truck stops did?

SPECIFIC CHANGES: Security (5 to 10 mins)

We have mentioned changes made to security at this site.

- How did you feel about personal and vehicle security at this site before the changes were made?
- How do you now feel about security since the changes were made?

PROBE FOR THOUGHTS ON:

- Feeling of personal safety
- Safety of vehicle / load

Which security features do you feel are most beneficial to your feeling of safety at this site?

- CCTV cameras – number of these and locations
- Lighting – quality and locations such as toilets / showers and exterior for parking)
- Security gates and fencing
- Automatic number plate recognition system (if applicable)
- Security staff on site
- Anything else
- How does the personal and vehicle security compare to your previous visits?

PROBE:

- Better
- No change
- Worse
- **Why do you say this?**
- What changes, or combination of changes, to security do you feel are most beneficial to drivers?
- PROBE:
 - CCTV cameras – number of these and locations
 - Lighting – quality and locations (i.e. interior and exterior)
 - Security gates and fencing
 - Automatic number plate recognition system (if applicable)
 - Security staff on site
 - Anything else
- Are there any changes that could be made to the security and feeling of safety at this site?
 - If yes:
 - What are these?

- If these changes were made, how would it influence your likelihood of visiting the site again?
- Which, if any, of these changes to security would you recommend other truck stops did?

SPECIFIC CHANGES: Toilets / Showers (5 to 10 mins)

We have mentioned changes made to the toilets and showers at this site.

- How did you feel about the toilets and showers at this site before the changes were made?
- How do you now feel about the toilets and showers since the changes were made?

PROBE FOR THOUGHTS ON:

- Number of toilets and showers
- Location of toilets and showers at the site (e.g. proximity to parking)
- Cleanliness and condition (i.e. how well-maintained)
- Separation of toilets for male and females
- Feeling of safety using toilets and showers
- Soap dispensers such as hands free dispensing
- Hand driers / towels
- Place to hang towel and clothes while showering
- Privacy when showering
- Quality of showers. Water pressure, water temperature, space in the cubicle
- Anything else
- How do the toilets and showers compare to your previous visits?

PROBE:

- Better
- No change
- Worse
- **Why do you say this?**
- What changes, or combination of changes, to the toilets and showers do you feel are most beneficial to drivers?
- PROBE:
 - Number of toilets / showers
 - Modernisation
- Are there any changes that could be made to the toilets and showers at this site?
 - If yes:
 - What are these?
 - If these changes were made, how would it influence your likelihood of visiting the site again?
- Which, if any, of the changes would you recommend other truck stops did?

SPECIFIC CHANGES: Café / Lounge / seating (5 to 10 mins)

- How did you feel about these areas at this site before the changes were made?
- How do you now feel about these areas since the changes were made?
- PROBE FOR THOUGHTS ON:

- Quality of seating area / comfort of seating area
- Value for money
- Impact on staff / Impact on service: e.g. pride in their new café / lounge / speed of service
- Opportunity to chat to other drivers
- Anything else
- How does the café / lounge area compare to your previous visits?

PROBE:

- Better
- No change
- Worse
- **Why do you say this?**
- IF HAVE VISITED SITE BEFORE: How do the cafes / shops compare to your previous visit? (PROBE: better, worse, no change)
- How does your experience of the cafes / shops influence your likelihood of visiting this site again in the future?
- Are there any changes that could be made to the cafes / shops at this site?
 - If yes:
 - What are these?
 - If these changes were made, how would it influence your likelihood of visiting the site again?
- Which, if any, of these changes would you recommend other truck stops did?

Overall views of changes made at the site (5 mins)

- Overall, which change made at this site do you feel is most beneficial to you?
 - Parking
 - Security
 - Toilets / Showers
 - Café / Lounge
- What could other sites learn from the changes made at this site / What could be improved upon at this site?
- Have you noticed any improvements to facilities at other sites?
 - If yes, PROBE for details including:
 - Type of site (e.g. MSA, truck stop, A road)
 - Type of improvement
 - Benefit they felt from the improvement

Driver recruitment and retention (5 mins)

- Are you thinking of leaving and no longer driving HGVs in the next five years?
 - If yes, why is this? If no, do you know drivers who are, and why is this:

PROBE:

- Retirement
- Driver pay / costs involved
- How valued they feel in the HGV industry
- How valued they feel by the company / companies they work for
- Time and effort involved
- Other opportunities
- Driver facilities
- Anything else
- PROBE: How high up the list of reasons to leave is driver facilities?
- Would further improvements to HGV sites and driver facilities encourage you to stay?
 - If no, why?
 - If yes, what and why?
- Do you think further improvements to HGV sites and driver facilities would encourage other drivers to continue?
 - If no, why?
 - If yes, what and why?
- Do you think further improvements to HGV sites and driver facilities would encourage others to become HGV drivers?
 - If no, why?
 - If yes, what and why?
- What else could DfT do to encourage and support others to become HGV drivers?

Wrap up

- Do you feel this site offers value for money for the parking cost?

NOTE: Do NOT include value for money for food as this is not an improvement made and is a separate cost and purchase decision.

 - PROBE: Is the driver considering all features e.g. toilets / showers, security, parking, lounge.
 - PROBE: How does value for money compare to before the changes, was it always value for money?
- Do you have any other comments about HGV sites and driver facilities in general, these may not be specifically for this site?
- Thank you very much for your time today
- Provide incentive and collect signature to confirm receipt

Appendix F Industry stakeholder discussion guide

Introduction (2 mins)

- Introduction on yourself: A researcher from AECOM who is an independent consultancy working on behalf of the Department for Transport (DfT).
- The purpose of the interview is to understand stakeholders' thoughts about the DfT's Match Funding Grant Scheme (MFGS), including awareness of it, the criteria for funding and application process, how the funding is used for making improvements to sites, and how the scheme could be improved.
- We will refer to the Scheme as "Match Funding Scheme" or simply "the Scheme."
- For the discussion today, we are interested in discussing MSAs, independent truck stops, and A-roads with facilities. Laybys are not a topic for today's discussion, but you will have the chance to share comments at the end if you want to
- Motorway Services Areas (MSAs), independent truck stops, and Trunk roads (or A-roads) either on, or close to, the Strategic Road Network (SRN).
- We want to hear your opinions. There are no right or wrong answers.
- If there are any questions you feel you are unable to answer without having a more detailed understanding of the Scheme and the processes involved, it is fine to say this
- Any information you provide will be treated in the strictest of confidence, and although the organisation will be identified as contributing to the research, your specific contributions won't be identified in the report without your consent.
- Do you consent to this session being audio-recorded purely for our accuracy of reporting? The recording will not be passed on to DfT.
- Interview should take 45 to 60 minutes.

Stakeholder introduction (3 mins)

Invite the stakeholder to introduce themselves. To include:

- Type and role of organisation
- Length of time working in the current role / logistics sector
- Size of organisation
 - IF APPROPRIATE: How many HGV drivers do you represent?
- What is your organisation's interest in the Match Funding Scheme?
 - Potential interests: Do not read the list below but use to gauge where to focus the discussion.
 - How the funding has been used
 - Impact on driver welfare; site security
 - Criteria to qualify and opportunities for others
 - Application process
 - Scheme delivery
- Confirm whether they do or do not have a need to discuss the application process and delivery of the scheme.

Typical experience at a truck stop (MAX 10 mins)

- To begin with, what do you think about the current quality of sites and their facilities for lorry drivers?

PROBE: Differences, if any, between types of site:

- MSAs
- Trunk roads (A-road) with facilities
- Independent Truck stops
- Local Authority truck stops,

PROBE: What differences, if any, between length of stay:

- Short stays of 45 minutes or less
- Long stays of up to 9 or more hour:

- For each of the following what do you feel sites generally do well and what could they do better?

PROBE: Confirm what is done well and where improvements could be made

- Driver welfare: e.g., toilets / showers / lounge / welcoming drivers
- Food: cost / quality / choice
- Parking
- Security: personal and vehicle
- Anything else?
 - Gym
 - Entertainment
 - Laundry facilities
 - Truck wash
 - Ease of paying (business pays directly)

PROBE: Any examples of sites which should be a barometer for others

- What impact do the quality of sites have on drivers?
 - PROBE: Impact on physical and mental wellbeing and driver welfare
 - PROBE: Impact on road safety
 - PROBE: Impact on driver motivation and energy levels
 - PROBE: Impact on driver job enjoyment and feeling valued.
- How do these link to driver recruitment and retention?
 - PROBE: recruitment and public perception of drivers and facilities
 - PROBE: motivating drivers to remain or leave the industry

Awareness and interest in MFGS (MAX 10 mins)

- When, and how, were you made aware of the DfT's Match Funding Grant Scheme?
 - PROBE: Channels of communication used
- Did your organisation communicate this out to its members?
 - If yes, how did members receive it?
 - If no, any reason why it wasn't communicated out?
- Do you agree with the MFGS approach for funding sites, as a principle?
 - PROBE: What benefits did the MFGS provide to the industry?
 - PROBE: Were there opportunities missed by DfT?
- How beneficial do you feel the MFGS has been and will be to.....
 - Drivers
 - Site owners
 - The road haulage industry
 - PROBE for each: Why do you say this?

In window 2, DfT included match funding for decarbonisation for the site. How important do you feel this is for site owners and drivers?

- PROBE: Any impact on sites such as:
 - lower costs
 - less maintenance (newer infrastructure)
 - use as a selling point to drivers / hauliers
- PROBE: Any impact on drivers such as:
 - improvement to lighting
 - new boilers delivering better showers / washing facilities
 - reliability of lighting, cooking equipment, showers / washing facilities

Improvement works at sites (MAX 10 mins)

- Have you any direct experience or received any feedback about the impact of the changes made using the Match Funding Scheme funding? If so, what have you seen or heard?
 - PROBE:
 - Own observations
 - Site feedback
 - Driver feedback
- What do you feel the impact of the improvements has been or will be for drivers?
 - PROBE: Mental health, motivation to remain in the industry, general public's perception of drivers, willing and able to socialise more with other drivers
 - PROBE: What benefits will drivers see from these improved sites over other sites (i.e., how do they compare)

Must cover, welfare (toilets, showers, lounge), parking and security

- How effective do you think these types of improvements will be at encouraging drivers to stay at a site overnight and not in laybys?

Do you have any case studies or examples of benefits / disbenefits?

- Once driver welfare (toilets, showers, lounge), parking and security are improved, what do site owners need to do next to improve their facilities for drivers?
 - PROBE: Welcoming, supporting drivers welfare more, social spaces, 'quiet' areas, entertainment, food choice and quality and dietary needs, site support (electric vehicles, mechanics available, parking management)
- What benefits would these have for drivers?

PROBE: Driver welfare; Driver retention; Driver recruitment; Public perception of the industry
- What benefits are site owners likely to expect from the Match Funding Grant Scheme investments made?
 - PROBE: Improved perception of site and facilities, increase in visitors, being approved sites for drivers to visit
- What, if any, disadvantages or disbenefits are site owners likely to expect from the Match Funding Grant Scheme investments made?
 - PROBE: return on investment, competitors also improving – feel they are standing still, time spent; demotivated to invest again
- What else could DfT or other organisations do to encourage and support:
 - Current drivers to continue in their role
 - Recruiting drivers to the industry?

Driver recruitment and retention (MAX 10 mins)

Questions and prompts only to be asked based on available time

- What do you think about the number of UK drivers currently in the industry?
 - PROBE: Not enough / Too many / Just right
 - What is the industry already doing well to retain drivers and to recruit new drivers?
 - PROBE: Confirm both retention and recruitment covered and any differences in requirements between the two
 - What more can the industry do to retain drivers and to recruit new drivers?
 - PROBE: Confirm both retention and recruitment covered and any differences in requirements between the two
-
- How much of an influence do you think the quality of sites and their facilities are in terms of drivers deciding to remain in the industry?
 - PROBE: Parking, security, toilets, showers, lounge / rest areasWhy / why not?
 - How much of an influence do you think the quality of sites and their facilities are in terms of drivers deciding to join the industry?
 - PROBE: Parking, security, toilets, showers, lounge / rest areasWhy / why not?
 - What other factors influence driver recruitment and retention
 - PROBE: pay / costs involved, lifestyle, working conditions, driver welfare / feeling valued, career progression, fatigue, other opportunities in another industry)
 - Where does the need for high quality facilities rank compared to the other factors you've mentioned?
 - What impact, if any, will these improvements have on retaining drivers in the industry?
 - What impact, if any, will these improvements have on recruiting drivers to the industry?

Wrap up (MAX 5 mins)

- What do you feel are the main learnings from the delivery of the Match Funding Scheme that could potentially inform future iterations of the fund, or similar funds?
- Do you have any other comments about the Match Funding Scheme, sites and facilities, or drivers in relation to these?
- Thank you very much for your time today
- Provide / agree incentive

Only ask if aware: MFGS application process (10 mins)

Check if the respondent would like to comment on the application process.

If yes:

1. How clear, or otherwise, do you feel the application process was, and why?
2. What did DfT do well and what could have been improved upon?

Additional points for discussion if this is an area of interest and the initial response to the two questions above did not cover each topic below.

- What are your thoughts about the application process for the Match Funding Scheme?
(See *potential areas of the process to probe on below*)
 - What did you like about the application process?
 - What did you dislike about the application process?
- What do you think motivated sites to apply for the Match Funding Scheme?
 - PROBE: Specific types of improvements targeted / eligible with the Scheme
 - PROBE: Opportunity to receive match funding
- What barriers, if any, restricted or discouraged sites from applying for the Match Funding Scheme?
 - If there were barriers, how can they be removed / mitigated?
- Do you feel like it was easier for some to apply than others (e.g. independent sites compared to large organisations)

Potential probes about application process:

- Clarity and accessibility of information about the Match Funding Scheme
 - How easy or difficult completing the application process / support and assistance available
 - Time / resource requirement for completing the application process
 - Concerns with potential delays with works and / or funding
 - Required site visit(s)
 - Sourcing quotes
 - Having funds to commit to then be match
 - Planning permission / challenges
- What are your thoughts about the eligibility criteria for the Match Funding Scheme?
(Moderator note: see separate information sheet with details about eligibility)
 - PROBE: Any sites / owners which were more or less likely to apply.
 - PROBE: Specific types of improvements targeted / eligible with the Match Funding Scheme
 - If the Match Funding Scheme were to be repeated, do you feel there should be any changes to the eligibility criteria?
 - If yes, what are these? (PROBE: Gaps in site / driver requirements that were not covered by the Match Funding Scheme)
 - If no, why not?
 - If the Match Funding Scheme were to be repeated, do you feel there should be any other changes to the application process?

- If yes, what are these? Why?
- What are your thoughts on the timing of the funding opportunity and timescales of the Match Funding Scheme?
 - PROBE: Timing with when the Match Funding Scheme is open for applications
 - PROBE: Timescales for submitting applications
 - PROBE: Timescales until decision received
 - PROBE: Timescales for implementation (i.e., time within which improvements need to be made)
- If the Match Funding Scheme were to be repeated, do you feel there should be any changes to the timings?
 - If yes, what are these? Why?
 - If no, why not?
- What are your thoughts on the funding confirmation and award process?
 - Do you feel any changes are required to the confirmation and award process?
 - If yes, what are these?
 - If no, why not?

Only ask if aware: Delivery of the MFGS (10 mins)

Check if the respondent would like to comment on the delivery process.

If yes:

3. How straight forward was the implementation of the improvements, including communication with DfT, contract and financial agreements, planning and timing
 4. What did DfT do well and what could have been improved upon?
- What are your thoughts on the monitoring and progress reporting requirements as part of the Match Funding Scheme for sites that are awarded funding?
 - PROBE: Were they seen as reasonable requirements for the Scheme?
 - PROBE: Were they seen as a barrier / off-putting (red tape, unnecessary bureaucracy, timings)?
 - ***IF NOT ALREADY DISCUSSED THE MAIN BENEFITS OF THE FUND TO SITES: What do you feel are the main benefits for sites with delivering improvements using Match Funding Scheme funding?***
 - PROBE:
 - Affordability: were not able to make the change previously
 - Motivating sites: make a change they hadn't previously considered
 - Competition: attracting drivers
 - Driver welfare
 - How could these benefits be shared with the wider industry?
 - PROBE: Would sharing information encourage other sites to invest in improvements?

What do you feel are the main challenges for sites with delivering improvements using Match Funding Scheme funding?

- PROBE: Human resources, procurement of contractors, generating cost estimates, planning permissions, work not being completed on time / to budget, DfT payment process and timeliness, overall management
 - PROBE: How could these challenges be reduced / mitigated in the future?
- Is there any further support site operators would have benefited from during the scheme implementation?
 - If yes, what? Why?
 - PROBE: DfT responsiveness; clarity of response; willingness to support / help
- Are you aware if any site operators sought additional support?
 - If yes: what support did they seek?
 - Why?
 - Did they receive any?

Appendix G Impact evaluation method

This appendix summarises the method for data collection, analysis and reporting for the impact evaluation. The impact evaluation consisted of:

- Two phases of HGV driver surveys, conducted at lorry parks.
- One phase of HGV driver in-depth interviews, conducted at lorry parks.
- One phase of industry stakeholder opinion in-depth interviews, undertaken via MS Teams.

G1 Driver survey design and data collection

The purpose of the driver survey was to establish the contribution of the scheme towards key outcomes for drivers, focusing on their awareness of changes, satisfaction with improvements and priorities for future investment. A target sample size of 50 interviews per lorry park was set. This delivered indicative data per lorry park and robust aggregated data for each type of improvement (facilities, security and parking); whilst the scheme also funded improvements in decarbonisation this was not included in the evaluation design as such improvements were considered unlikely to be noticeable to drivers.

G1.1 Lorry park selection

There were 70 successful applications across the first two funding windows, resulting in improvement works at 34 lorry parks in window one and 36 in window two. Of these, four lorry parks received funding in both windows. There were therefore 66 unique sites were eligible to take part in the evaluation.

Budgetary constraints allowed for 25 lorry parks to be included for the evaluation. Owing to the timings of the survey and when operators completed works, 10 lorry parks were selected in phase one and 15 in phase two. Only sites that had completed their works were selected. Sites were sampled to ensure adequate representation of:

- **Facilities:** At least two in each phase made improvements to
 - Toilets
 - Showers
 - Café/lounge
- **Security:** At least two in each phase made improvements to
 - CCTV
 - ANPR / security gates, security fencing and lighting improvements
- **Parking:** At least two in each phase made improvements to
 - Surface improvement
 - Additional parking spaces
- **Type of operator:** Most MSAs with approved funding were owned by a single operator and if selected proportionally these sites would have dominated the sample therefore a cap of eight MSA lorry parks (c33% of all lorry parks) was set to avoid a skew. All independent operators were eligible for selection

A secondary criterion was location. For the independent sites stratification by location was limited due to ensuring sites include all improvement types. The MSA operator however, included sites that were considered interchangeable as they had the same type of improvements. MSA lorry parks were therefore selected to provide coverage across as many regions as possible, as defined by the DfT's database of lorry parks (East of England, East Midlands, West Midlands, South East, Yorkshire & Humber, North East, South West). The final sample included MSA sites in East of England (1), Midlands (3), North West (1) and the South East (1). No sites available in the South West or Yorkshire & Humberside.

Independent truck stops are unique and therefore it is difficult to define what a representative profile would be. The sample process was limited by the number of sites that had completed their works before the survey period. By ensuring all types of improvements were included the data provided sufficient numbers to give a good indication of the impact of the works at these types of site. It would be expected that similar results would be achieved at other services assuming similar size and similar intervention.

G1.2 Questionnaire design

The questionnaire was designed by AECOM and approved by the DfT as described below:

- Drivers were asked about their views on lorry park facilities but were only asked about improvements at lorry parks that had used funding from the scheme for upgrades. Where possible, the questions were taken from previous research such as the Transport Focus lorry drivers' facilities survey, so that they had already been cognitively tested. Using the same question wording would enable the DfT to compare responses with the Transport Focus survey if required.
- The questionnaire had one round of additional cognitive testing so that any new questions in phase one could also be assessed; this process also further tested existing questions that were tested by Transport Focus. Cognitive tests took place with 12 HGV drivers. They were held at three lorry parks to ensure all types of improvement were included and tested. The cognitive testing checked if all questions were clear and easy to understand and that drivers were able to provide a view about the level of improvements. Minor updates to question wording were made following this process.
- The questionnaire was translated by a professional translation company into Bulgarian, Hungarian, Polish and Romanian. Previous lorry driver surveys had evidenced that drivers from countries in Western Europe who also typically drove in England were able to complete surveys in English.

The questionnaire is provided in Appendix D.

G1.3 Administering the surveys

Surveys were administered:

- Phase one: Monday 8 August to Thursday 12 September 2024. Phase one was delayed due to the pre-election period prior to the 2024 general election.
- Phase two: Tuesday 7 May to Monday 30 June 2025 which followed local elections.

The method of administering the survey was as follows:

- The survey was scripted using Askia software, and lasted approximately 10 minutes.
- Survey shifts were completed on weekdays 2pm and 8pm, typically the times with the highest footfall and when drivers used more facilities. Weekend interviewing was completed occasionally, only when lorry park owners advised they experienced high footfall.
- A minimum of two interviewers completed between four to six shifts each at most lorry parks to achieve the required sample. Some sites with lower footfall sites required additional shifts.
- Surveys were interviewer-led for drivers who spoke English. A translated version of the survey was provided for drivers who did not speak English to self-complete.
- HGV drivers were approached once they had used all the facilities during their visit, with interviewers positioned to identify drivers returning to their vehicles.
- To encourage participation, respondents were offered the option to enter a prize draw to win one of five prizes of £100 in high street shopping vouchers. All responses were anonymous and participants responded voluntarily.

G1.4 Driver survey outcomes

A total of 1,224 responses were achieved across the two phases, 612 in each phase. Of these, 87% (n=1,061) lived in the UK, 13% (n=163) lived outside the UK. Most responses (91%, n=1,118) were provided in English and 9% (n=106) in another language.

- Polish (5%, n=63)
- Romanian (3%, n=34)
- Bulgarian (1%, n=7)
- Hungarian (<1%, n=2)

With the exception of one driver, all 1,224 respondents reported their age. The breakdown by age was:

- 14% (n=167) aged 34-years-old or under.
- 47% (n= 571) aged 35-to-54-years-old.
- 40% (n=485) aged 55-years-old or over.

All except three respondents provided a response about their gender. The split of respondents by gender was 98% (n=1,205) males and 1% (n=16) females, close to the industry profile for drivers who lived in England, which is 98.9% male, 1.1% female. This matches the industry profile sourced from the Office for National Statistics website: [Annual population survey - regional - occupation \(SOC2020\) by sex by employment type](#). Over half the respondents had 20 or more years' experience. The level of industry experience of all 1,224 respondents was:

- 15% (n=178) had less than 5 years' experience.
- 14% (n=177) had 5-to-9 years' experience.
- 20% (n=247) had 10-to-19 years' experience.
- 51% (n=622) had 20 or more years' experience.

Of the 16 female drivers, nine had under 10 years' experience and seven had 10 or more years' experience. The lorry parks selected in the phase one and two for the survey, the types of improvements made, and number of surveys achieved are shown in the next two tables.

Table G1: Lorry parks, improvement type and number of surveys: phase one

Region	Lorry park name	Type	Improvement	No. Surveys
Midlands	Campbell Road	Truck stop	Facilities	55
Midlands	ADS	Truck stop	Facilities Security Parking	56
Midlands	The Hollies	Truck stop	Parking	76
South East	Stop 24 Folkestone	MSA	Facilities	62
Yorkshire and Humberside	A19 Exelby	Truck stop	Facilities Security Parking	65
Yorkshire and Humberside	Scunthorpe	Truck stop	Facilities Security Parking	41
East of England	Thurrock	MSA	Facilities	70
Midlands	Grantham	TRSA	Facilities	61
Midlands	Frankley South	MSA	Facilities	66
North West	Birch West	MSA	Facilities	60
Total				612

Table G2: Lorry parks, improvement type and number of surveys: phase two

Region	Lorry park name	Type	Improvement	No. Surveys
East of England	London Road Parking Compound*	Truck stop	Facilities	9
East of England	Mardyke Truck Park	Truck stop	Facilities Security Parking	48
Midlands	Silver Birches*	Truck stop	Facilities Parking Decarbonisation	13
Midlands	Wellington Place	Truck stop	Facilities	51
South East	Embassy Truck Park	Truck stop	Facilities Security Parking	50
South West	Teddington Hands Truckstop	Truck stop	Facilities Parking	56
South West	Markay Estate*	Truck stop	Facilities Parking	12
Yorkshire and Humberside	Emms Transport and Training Group*	Truck stop	Facilities	13

Yorkshire and Humberside	Grimsby Truck Stop and Wash	Truck stop	Facilities Security	50
Yorkshire and Humberside	Immingham Lorry Park	Truck stop	Security Parking	52
Yorkshire and Humberside	Junction 31 Secure Parking	Truck stop	Facilities	51
Yorkshire and Humberside	Whitwood Truckstop	Truck stop	Facilities Security	51
South East	Medway	MSA	Security Parking	55
Midlands	Staffordshire Northbound	MSA	Facilities Parking Decarbonisation	50
Midlands	Toddington - Northbound	MSA	Parking	51
Total				612

In phase two, the four lorry parks highlighted by * in Table G2 had fewer surveys than others due to the low number of HGVs who used the lorry park. The main findings were run with the data from these four lorry parks included and excluded. When the two sets of findings were compared, there was no significant difference in the results, therefore this data was included.

The number of surveys completed for each type of improvement made is shown in Table G3.

Table G3: Number of surveys by type of improvement

Improvement	Specific improvement	No. surveys completed	Percentage of total surveys
Facilities	Toilets	715	58
	Showers	763	66
	Café or restaurant	379	31
	Lounge	384	31
Total facilities		927	76
Security	CCTV	281	23
	Lighting	301	25
	Fencing	221	18
	Gates or ANPR	180	15
Total security		387	32
Parking	Surface	467	38
	Signage	303	25
Total parking		735	60
Total surveys		1,224	100

G1.5 Quality assurance

All interviewers were accompanied by another colleague from the research team to confirm the consistency of their approach and administration. Back checking was completed with at least 10% of respondents per interviewer to verify the survey had been administered correctly with responses accurately recorded.

An initial set of frequencies was run to enable the data to be checked that routing had been applied correctly, and responses were logical and consistent. Survey length was compared and checked for consistency.

G1.6 Driver survey analysis and reporting

The data collected using Askia software was imported directly into IBM SPSS, a statistical analysis software package. Frequencies were run for each question and cross-tabulations for each of the following sub groups:

- Age.
- Years' experience.
- Frequency of visiting the lorry park.
- Type of improvement (facilities, security, parking).
- Type of lorry park (MSA or independent operator).

As this is a non-probability sampling design, we cannot technically calculate precise confidence intervals or standard errors. While it was not possible to calculate precise confidence intervals or standard errors, we applied a rule of thumb shown in the table below to enable us to highlight any differences observed during subgroup analysis. For example, for the total sample of approximately 1200 driver surveys the reader can assume a confidence interval of +/- 2.8 percentage points and on sub-sample analysis with a base of 300 a confidence interval of +/- 5.7 percentage points on a finding of 50% at 95% confidence level. This allowed the detection of any difference in response of 12 percentage points or more between subgroups.

Table G4 Confidence Intervals

Sample size	CI +/-
200	6.9%
400	4.9%
600	4.0%
800	3.5%
1000	3.1%
1224	2.8%

Drivers were only asked relevant questions and therefore the number responding to each question varies because:

- Each lorry park had different types of improvement works.

- Only those that had noticed the improvements were asked its impact.

Some percentages do not sum to exactly 100 per cent due to rounding or where more than one response was permitted. In tables and charts, an asterisk (*) is used to show where data is less than one per cent.

G2 Driver in-depth interviews

To add greater insight to the survey data, 20 in-depth interviews were completed at four lorry parks. These were all completed in phase one.

G2.1 Lorry park selection

The four lorry parks were selected in discussion with the DfT, to ensure that as many sites included all types of improvements (facilities, parking and safety). The three independent truck stops had all types of improvement delivered through the scheme funding. The final lorry park was an MSA site, selected to ensure that one MSA was included. In phase one, the MSA lorry parks only had improvements to toilets and showers, and so this site did not have full coverage across the improvement types. No other factors were used in selecting the lorry parks for use in the in-depth interviews.

Table G4 Lorry parks for in-depth interviews

Region	Lorry park	Type	Improvement	No. of in-depth interviews
Midlands	ADS	Truck stop	Facilities Security Parking	5
Yorkshire and Humberside	A19 Exelby	Truck stop	Facilities Security Parking	6
Yorkshire and Humberside	Scunthorpe	Truck stop	Facilities Security Parking	3
North West	N/A	MSA	Facilities only	6
Total				20

G2.2 Discussion guide design

A discussion guide was designed by AECOM and approved by the DfT for moderators to follow and ensure all topics were covered. The topics included in the discussion were:

- Drivers' current experience of lorry parks.
- Whether they had noticed any changes at the lorry park and awareness of improvements being made nationwide. A walk around the lorry park to identify the changes and explain the benefits or otherwise, was included.
- The impact of improvements on driver recruitment and retention.
- Whether the DfT and other lorry parks should prioritise facilities, security or parking and reasons for this.

The full discussion guide is provided in Appendix E.

G2.3 Administering the interviews

Two interviewers attended each in-depth interview to ensure consistency of approach, reduce any potential for interviewer bias and ensure high quality analysis and insight.

- The in-depth interviews were completed between May and September 2024 and were held in the evenings when respondents were expected to be more available and on longer driving breaks.
- Drivers were recruited on the day from each lorry park and were eligible to participate if they have visited the lorry park previously. A convenience sampling approach was adopted for selecting drivers for interview due to the relatively low footfall at some sites. This approach was agreed with the DfT during the design process.
- Interviews took up to 60 minutes and were conducted face-to-face with drivers at the lorry parks.
- During the in-depth interview, drivers were encouraged to walk around the lorry park with the interviewer and discuss the changes made, including both those they were and were not aware of to get their thoughts.
- Each respondent was offered an incentive of £30 cash for their participation.

G2.4 Driver in-depth interview respondent profile

The age profile of the 20 respondents was:

- Three were aged 34-years-old or under
- Seven were aged 35-to-54-years-old
- Ten were aged 55-years-old or over

The years industry experience was:

- Three had less than 5 years' experience
- Three had 5-to-9 years' experience
- Three had 10-to-19 years' experience
- 11 had 20 or more years' experience

G2.5 Quality assurance

All interviews were recorded with the permission of respondents, and these recordings were transcribed and used to aid analysis and to support moderator notes. Recordings were stored securely and password protected on the AECOM server. After one interviewing session each, the Project Manager and moderators met to de-brief about data collected. This de-brief ensured all topics in the discussion guide were being understood clearly by both moderators and respondents and assessed if early-stage findings were consistent. Once all interviews were complete a second de-brief took place to build headline findings and themes described in the analysis and reporting section.

G2.6 Analysis and reporting

Thematic analysis was used to identify, analyse, and interpret responses provided by respondents. The basis of the analysis was the transcripts, notes and write-ups made by the moderator. To ensure robust, auditable analysis, responses were

ordered onto a matrix with one axis containing the respondent characteristics and the other the themes.

The themes were developed by the moderators, who read all transcripts/notes and structured the response around the evaluation questions. Themes included:

- Awareness of the funding scheme
- Motivation for applying for funding
- Decision making process for applying
- Barriers to applying for funding
- Application process - criteria for funding
- Application process - clarity of information and support
- Application process - timescales
- Application process - recommended changes to application process
- How else the DfT/government can assist with improving sites/facilities
- Improvement works - outcomes and impact on plans
- Delivery of improvements - risks and challenges
- Delivery of improvements - monitoring and reporting
- Delivery of improvements - management of process and improvements
- Delivery of improvements - learnings and recommended changes
- Any other comments

The real value of qualitative research findings comes from the way that it is understood and interpreted rather than giving emphasis to any point because of how many times it was mentioned by respondents. The themes with the largest number of mentions were used to shape the analysis of the data, however, those less mentioned themes, where pertinent to the evaluation in terms of being linked to anticipated outcomes, were also included.

Quotes were extracted from the transcripts where these aided the presentation of the issues within the reporting.

G3 Industry stakeholder opinion in-depth interviews

In-depth interviews were completed with industry stakeholders who either had a direct interest in the industry or had a direct interest in driver welfare. The five industry stakeholders who were selected and were available for interview were:

- Chartered Institute of Logistics and Transport
- Logistics UK
- Mates in Mind
- Road Haulage Association
- Unite the Union

Each stakeholder was approached by email and asked to participate in the evaluation. Information about each stakeholder group is provided in Appendix C.

G3.1 Discussion guide design

A discussion guide was designed by AECOM and approved by the DfT for moderators to follow and ensure all topics were covered. The topics included in the discussion were:

- Stakeholder thoughts on the current quality of lorry parks and the facilities they provide to drivers.
- The impact of high quality and low quality lorry parks on drivers.
- Awareness of the scheme.
- Any examples or case studies of driver benefits resulting from the scheme.
- The impact of improvements on driver recruitment and retention.

The full discussion guide is provided in Appendix F.

G3.2 Administering the interviews

Two moderators were present for each in-depth interview with stakeholders, which lasted up to one hour. The Project Manager attended the first two interviews so that they were able to see first hand the feedback received, the context of the scheme and to consider how the evidence generated would feed into the evaluation. Not all interviews were attended by the Project Manager as it was only undertaken at the start of the process to feed into the subsequent analysis process.

Interviews were completed over MS Teams and recorded with the respondent's permission.

G3.3 Quality assurance, analysis and reporting

The quality assurance and analytical process was the same as those described for the impact evaluation in this methodology.

Appendix H Driver survey data tables

Asked to all		
Q language. Language the driver would like to use to complete the survey	Number	%
English	1,118	91
Polish	63	5
Romanian	34	3
Bulgarian	7	1
Hungarian	2	0
Total	1,224	100

Asked to all		
Q1. When was the last time you visited this site before today?	Number	%
Within the last week	426	35
Longer than a week ago but within the last month	334	27
Longer than a month ago but within the last six months	241	20
Longer than six months ago but within the last year	86	7
Longer than a year ago but within the last two years	22	2
More than two years ago	12	1
Never visited before	100	8
I can't remember	3	0
Total	1,224	100

Asked to all who visited in the last year		
Q2. Typically, how often do you visit this site?	Number	%
Five times a week or more	85	8
Once a week at least, but not five times a week	389	36
Once a month at least, but not once a week	324	30
Once every three months at least, but not once a month	165	15
Once every six months at least, but not once every three months	85	8
About once a year	25	2
I can't remember	14	1
Total	1,087	100

Asked to respondents who visited lorry parks with work completed in 2024 (phase 2 only)?		
Filter: Asked to respondents at Junction 31 Parking; Mardyke Truck Park, Wellington Place. Ems Transport and Training Group		
Q2A. Did you visit this site before [Completion Date] ?	Number	%
Yes	128	81
No	27	17
Don't know	3	2
Total	158	100

Asked to all		
Q3. Which of these have you already used today?	Number	%
Toilets	998	82
Showers	552	45
Cafe / Restaurant	587	48
Lounge / seating area	278	23
None of these	102	8
Total	1,224	100

Unprompted awareness of toilets/showers		
Calculated from Q5A Filter: Sites that had any changes to toilets/showers and respondents had visited i in the last year and [if required] selected “Yes” at Q2A		
Aware of toilets/showers changes (UNPROMPTED)	Number	%
Yes	313	49
No	326	51
Total	639	100

Only asked about sites which had café or lounge changes		
Calculated from Q5A Filter: Sites that had any changes to café / lounge and respondents had visited i in the last year and [if required] selected “Yes” at Q2A		
Aware of café/lounge changes (UNPROMPTED)	Number	%
Yes	211	47
No	237	53
Total	448	100

Only asked about sites which had security changes		
Calculated from Q5A Filter: Sites that had any changes to security and respondents had visited i in the last year and [if required] selected “Yes” at Q2A		
Aware of any security changes (UNPROMPTED)	Number	%
Yes	67	21
No	248	79
Total	315	100

Only asked about sites which had parking changes		
Calculated from Q5A Filter: Sites that had any changes to parking and respondents had visited in the last year and [if required] selected “Yes” at Q2A		
Aware of any parking changes (UNPROMPTED)	Number	%
Yes	243	38
No	395	62
Total	638	100

Only asked about sites which had toilets or shower changes		
Filter: Respondents who were unaware of toilets or shower changes (unprompted), had visited in the last year and [if required] selected "Yes" at Q2A*		
Q6. This site had changes made to their toilets and showers. Now I mentioned it, have you noticed this?	Number	%
Yes	107	39
No	117	43
Don't know	47	17
Total	271	100

*Data excludes Frankley which was initially advised did not have toilet/shower changes

Only asked about sites which had toilets or shower changes		
Calculated: Respondents who were aware unprompted (Q5A) or prompted (Q6)		
Aware of toilets/showers changes (CALCULATED Q5A or Q6)	Number	%
Yes	420	66
No	219	34
Total	639	100

Only asked about sites which had toilets or shower changes		
Filter: Respondents who were aware and used toilets on the day. Those never used have been excluded		
Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Number of toilets available	Number	%
Improved a lot	251	67
Improved a little	66	18
Remained the same	49	13
Become a little worse	5	1
Become a lot worse	0	0
Don't know / can't remember	5	1
Total	376	100

Only asked about sites which had toilets or shower changes		
Filter: Respondents who were aware and used showers on the day. Those never used have been excluded		
Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Number of showers available	Number	%
Improved a lot	215	63
Improved a little	54	16
Remained the same	50	15
Become a little worse	3	1
Become a lot worse	0	0
Don't know / can't remember	19	6
Total	341	100

Only asked about sites which had toilets or shower changes**Filter:****Respondents who were aware and used toilets/showers on the day. Those never used have been excluded**

Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Feeling modern and fresh	Number	%
Improved a lot	268	72
Improved a little	77	21
Remained the same	20	5
Become a little worse	1	0
Become a lot worse	0	0
Don't know / can't remember	4	1
Total	370	100

Only asked about sites which had toilets or shower changes**Filter:****Respondents who were aware and used toilets/showers on the day. Those never used have been excluded**

Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Feeling safe while in the toilet / shower block	Number	%
Improved a lot	235	65
Improved a little	58	16
Remained the same	65	18
Become a little worse	0	0
Become a lot worse	1	0
Don't know / can't remember	5	1
Total	364	100

Only asked about sites which had toilets or shower changes**Filter:****Respondents who were aware and used toilets/showers on the day. Those never used have been excluded**

Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Available soap dispensers	Number	%
Improved a lot	201	57
Improved a little	69	20
Remained the same	40	11
Become a little worse	6	2
Become a lot worse	0	0
Don't know / can't remember	36	10
Total	352	100

Only asked about sites which had toilets or shower changes		
Filter: Respondents who were aware and used toilets/showers on the day. Those never used have been excluded		
Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Working hand driers	Number	%
Improved a lot	214	59
Improved a little	80	22
Remained the same	41	11
Become a little worse	6	2
Become a lot worse	1	0
Don't know / can't remember	21	6
Total	363	100

Only asked about sites which had toilets or shower changes		
Filter: Respondents who were aware and used showers on the day. Those never used have been excluded		
Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - A place to hang clothes while in the shower	Number	%
Improved a lot	183	57
Improved a little	60	19
Remained the same	44	14
Become a little worse	8	2
Become a lot worse	3	1
Don't know / can't remember	23	7
Total	321	100

Only asked about sites which had toilets or shower changes		
Filter: Respondents who were aware and used showers on the day. Those never used have been excluded		
Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - A place to put shower gel or soap while showering	Number	%
Improved a lot	174	55
Improved a little	61	19
Remained the same	55	17
Become a little worse	2	1
Become a lot worse	2	1
Don't know / can't remember	25	8
Total	319	100

Only asked about sites which had toilets or shower changes**Filter:****Respondents who were aware and used showers on the day.****Those never used have been excluded**

Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Quality of showers	Number	%
Improved a lot	220	69
Improved a little	55	17
Remained the same	23	7
Become a little worse	1	0
Become a lot worse	2	1
Don't know / can't remember	18	6
Total	319	100

Only asked about sites which had toilets or shower changes**Filter:****Respondents who were aware and used showers on the day.****Those never used have been excluded**

Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - The amount of space in the shower cubicle	Number	%
Improved a lot	194	61
Improved a little	60	19
Remained the same	42	13
Become a little worse	1	0
Become a lot worse	3	1
Don't know / can't remember	19	6
Total	319	100

Only asked about sites which had toilets or shower changes**Filter:****Respondents who were aware and used showers on the day.****Those never used have been excluded**

Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - A place to sit down before and after a shower	Number	%
Improved a lot	178	56
Improved a little	50	16
Remained the same	55	17
Become a little worse	5	2
Become a lot worse	2	1
Don't know / can't remember	26	8
Total	316	100

Only asked about sites which had toilets or shower changes		
Filter: Respondents who were aware and used showers on the day. Those never used have been excluded		
Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Ventilation in the shower	Number	%
Improved a lot	165	51
Improved a little	56	17
Remained the same	53	17
Become a little worse	3	1
Become a lot worse	3	1
Don't know / can't remember	41	13
Total	321	100

Only asked about sites which had toilets or shower changes		
Filter: Respondents who were aware and used toilets/showers on the day. Those never used have been excluded		
Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Lighting in the toilet / shower block	Number	%
Improved a lot	193	59
Improved a little	61	19
Remained the same	43	13
Become a little worse	1	0
Become a lot worse	1	0
Don't know / can't remember	28	9
Total	327	100

Only asked about sites which had toilets or shower changes		
Filter: Asked in phase 2 only. Respondents who were aware and used showers on the day. Those never used have been excluded		
Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Water temperature of the showers	Number	%
Improved a lot	88	82
Improved a little	5	5
Remained the same	13	12
Become a little worse	0	0
Become a lot worse	0	0
Don't know / can't remember	1	1
Total	107	100

Only asked about sites which had toilets or shower changes

Filter:

Asked in phase 2 only.

Respondents who were aware and used showers on the day.

Those never used have been excluded

Q7. How would you rate the updated toilets and showers, compared to before the changes were made, for...? - Water pressure of the showers	Number	%
Improved a lot	86	80
Improved a little	9	8
Remained the same	9	8
Become a little worse	2	2
Become a lot worse	0	0
Don't know / can't remember	1	1
Total	107	100

Only asked about sites which had café or lounge changes

Filter:

Respondents who were unaware of café or lounge changes (unprompted), had visited in the last year and [if required] selected "Yes" at Q2A

Q9. This site had changes made to their café, lounge or seating area recently. Now I mentioned it, have you noticed this?	Number	%
Yes	103	42
No	107	44
Don't know	35	14
Total	245	100

Only asked about sites which had café or lounge changes

Calculated:

Respondents who were aware unprompted (Q5A) or prompted (Q9)

Aware of café/lounge changes/ (CALCULATED Q5A or Q9)	Number	%
Yes	314	70
No	134	30
Total	448	100

Only asked about sites which had café or lounge changes

Filter:

Asked in phase 2 only.

Respondents who were aware of café / lounge changes and used café/lounge on the day.

Q10A. Which of the following statements do you agree or disagree with about changes to the café, lounge or seating area? - The seating area is more comfortable	Number	%
Strongly agree	97	70
Agree	41	29
Neither agree nor disagree	1	1
Disagree	0	0
Strongly disagree	0	0
Total	139	100

Only asked about sites which had café or lounge changes**Filter:****Asked in phase 2 only.****Respondents who were aware of café / lounge changes and used café/lounge on the day.**

Q10A. Which of the following statements do you agree or disagree with about changes to the café, lounge or seating area? - The seating area is more comfortable	Number	%
Strongly agree	97	70
Agree	41	29
Neither agree nor disagree	1	1
Disagree	0	0
Strongly disagree	0	0
Total	139	100

Only asked about sites which had café or lounge changes**Filter:****Asked in phase 2 only.****Respondents who were aware of café / lounge changes and used café/lounge on the day.**

Q10A. Which of the following statements do you agree or disagree with about changes to the café, lounge or seating area? - The quality of food has improved	Number	%
Strongly agree	62	59
Agree	31	30
Neither agree nor disagree	11	10
Disagree	1	1
Strongly disagree	0	0
Total	105	100

Only asked about sites which had café or lounge changes**Filter:****Asked in phase 2 only.****Respondents who were aware of café / lounge changes and used café/lounge on the day.**

Q10A. Which of the following statements do you agree or disagree with about changes to the café, lounge or seating area? - The choice of food has improved	Number	%
Strongly agree	60	58
Agree	32	31
Neither agree nor disagree	10	10
Disagree	2	2
Strongly disagree	0	0
Total	104	100

Only asked about sites which had café or lounge changes**Filter:****Asked in phase 2 only.****Respondents who were aware of café / lounge changes and used café/lounge on the day.**

Q10A. Which of the following statements do you agree or disagree with about changes to the café, lounge or seating area? - The speed of service has improved	Number	%
Strongly agree	57	55
Agree	30	29
Neither agree nor disagree	15	14
Disagree	1	1
Strongly disagree	1	1
Total	104	100

Only asked about sites which had café or lounge changes**Filter:****Asked in phase 2 only.****Respondents who were aware of café / lounge changes and used café/lounge on the day.**

Q10A. Which of the following statements do you agree or disagree with about changes to the café, lounge or seating area? - Value for money has improved	Number	%
Strongly agree	48	46
Agree	33	32
Neither agree nor disagree	22	21
Disagree	1	1
Strongly disagree	0	0
Total	104	100

Only asked about sites which had café or lounge changes**Filter:****Asked in phase 2 only.****Respondents who were aware of café / lounge changes and used café/lounge on the day.**

Q10A. Which of the following statements do you agree or disagree with about changes to the café, lounge or seating area? - There is more opportunity to chat to other drivers than before	Number	%
Strongly agree	66	49
Agree	51	38
Neither agree nor disagree	17	13
Disagree	2	1
Strongly disagree	0	0
Total	136	100

Only asked about sites which had café or lounge changes		
Filter: Respondents who were aware of café / lounge changes and used café/lounge on the day.		
Q10. How would you rate the updated café, lounge or seating area here compared to before the changes were made?	Number	%
Improved a lot	231	84
Improved a little	30	11
Remained the same	9	3
Become a little worse	0	0
Become a lot worse	0	0
Don't know / can't remember	4	1
Total	274	100

Only asked about sites which had security changes		
Filter: Respondents who were unaware of security changes (unprompted), had visited in the last year and [if required] selected "Yes" at Q2A		
Q12. This site had changes made to their security. Have you noticed the following?	Number	%
CCTV	57	23
Lighting outside	34	14
Security fence	50	20
Security gates	25	10
ANPR	44	18
None of these	146	59
Total	246	100

Only asked about sites which had security changes		
Calculated: Respondents who were aware unprompted (Q5A) or prompted (Q12)		
Aware of any security changes (CALCULATED Q5A or Q12)	Number	%
Yes	167	53
No	148	47
Total	315	100

Only asked about sites which had lighting security changes		
Filter: Respondents who were aware of security changes		
Q13. Which of the following statements do you agree or disagree with about changes to the site? - Lighting outside makes me feel secure when walking around the site	Number	%
Strongly agree	59	61
Agree	23	24
Neither agree nor disagree	9	9
Disagree	0	0
Strongly disagree	1	1
Don't know	5	5
Total	97	100

Only asked about sites which had lighting security changes		
Filter: Respondents who were aware of security changes		
Q13. Which of the following statements do you agree or disagree with about changes to the site? - Lighting outside makes me confident about the security of my vehicle and its load	Number	%
Strongly agree	55	57
Agree	28	29
Neither agree nor disagree	7	7
Disagree	4	4
Strongly disagree	0	0
Don't know	3	3
Total	97	100

Only asked about sites which had security gate changes		
Filter: Respondents who were aware of security changes		
Q13. Which of the following statements do you agree or disagree with about changes to the site? - Security gates help me feel more confident about the security of my vehicle and its load	Number	%
Strongly agree	86	77
Agree	21	19
Neither agree nor disagree	3	3
Disagree	0	0
Strongly disagree	0	0
Don't know	1	1
Total	111	100

Only asked about sites which had security fencing changes		
Filter: Respondents who were aware of security changes		
Q13. Which of the following statements do you agree or disagree with about changes to the site? - Security fencing helps me feel more confident about the security of my vehicle and its load	Number	%
Strongly agree	84	76
Agree	23	21
Neither agree nor disagree	2	2
Disagree	0	0
Strongly disagree	0	0
Don't know	2	2
Total	111	100

Only asked about sites which had CCTV security changes		
Filter: Respondents who were aware of security changes		
Q13. Which of the following statements do you agree or disagree with about changes to the site? - CCTV makes me more confident about the security of my vehicle and its load	Number	%
Strongly agree	103	77
Agree	28	21
Neither agree nor disagree	1	1
Disagree	0	0
Strongly disagree	0	0
Don't know	1	1
Total	133	100

Only asked about sites which had ANPR security changes		
Filter: Respondents who were aware of security changes		
Q13. Which of the following statements do you agree or disagree with about changes to the site? - Automatic Number Plate Recognition (ANPR) makes me more confident about the security of my vehicle and its load	Number	%
Strongly agree	68	48
Agree	31	22
Neither agree nor disagree	18	13
Disagree	5	4
Strongly disagree	0	0
Don't know	19	13
Total	141	100

Only asked about sites which had security changes		
Filter: Respondents who were aware of security changes		
Q14. Overall, how would you rate your vehicle security at this site compared to visits before?	Number	%
Improved a lot	115	69
Improved a little	24	14
Remained the same	20	12
Become a little worse	0	0
Become a lot worse	0	0
Don't know / can't remember	7	4
Total	166	100

Only asked about sites which had security changes**Filter:****Respondents who were aware of security changes**

Q14. Overall, how would you rate your personal security at this site compared to visits before?	Number	%
Improved a lot	103	62
Improved a little	27	16
Remained the same	29	17
Become a little worse	0	0
Become a lot worse	0	0
Don't know / can't remember	7	4
Total	166	100

Only asked about sites which had parking changes**Filter:****Respondents who were unaware of parking changes (unprompted), had visited in the last year and [if required] selected "Yes" at Q2A**

Q16. This site had changes made to their parking. Have you noticed changes to the following?	Number	%
Parking surface	116	29
Number of parking spaces	77	19
Signage	39	10
Parking bay markings	80	20
None of these	214	53
Total	403	100

Only asked about sites which had parking changes**Filter:****Respondents who were unaware of parking changes (unprompted), had visited in the last year and [if required] selected "Yes" at Q2A**

Aware of any parking changes (CALCULATED Q5A or Q16)	Number	%
Yes	425	67
No	213	33
Total	638	100

Only asked about sites which had parking changes**Filter:****Respondents who were aware of parking changes**

Q17. Which of the following statements do you agree or disagree with about changes to the site? - I am more confident about finding a parking space at this site nowadays	Number	%
Strongly agree	218	51
Agree	109	26
Neither agree nor disagree	66	16
Disagree	18	4
Strongly disagree	2	0
Don't know	12	3
Total	425	100

Only asked about sites which had changes to the road surface (parking)		
Filter: Respondents who were aware of parking changes		
Q17. Which of the following statements do you agree or disagree with about changes to the site? - The road surface in the parking area has improved at this site	Number	%
Strongly agree	201	62
Agree	87	27
Neither agree nor disagree	23	7
Disagree	9	3
Strongly disagree	0	0
Don't know	2	1
Total	322	100

Only asked about sites which had parking changes		
Filter: Respondents who were aware of parking changes		
Q17. Which of the following statements do you agree or disagree with about changes to the site? - I am able to manoeuvre my vehicle more easily at this site nowadays	Number	%
Strongly agree	220	52
Agree	126	30
Neither agree nor disagree	58	14
Disagree	13	3
Strongly disagree	6	1
Strongly agree	2	0
Agree	425	100

Only asked about sites which had parking changes		
Filter: Respondents who were aware of parking changes		
Q17. Which of the following statements do you agree or disagree with about changes to the site? - The parking bays are more clearly marked out nowadays	Number	%
Strongly agree	240	56
Agree	125	29
Neither agree nor disagree	39	9
Disagree	17	4
Strongly disagree	3	1
Don't know	1	0
Total	425	100

Only asked about sites which had parking changes		
Filter: Respondents who were aware of parking changes		
Q18. Overall, how would you rate parking at this site compared to visits before 2024?	Number	%
Improved a lot	244	57
Improved a little	118	28
Remained the same	45	11
Become a little worse	6	1
Become a lot worse	1	0
Don't know / can't remember	11	3
Total	425	100

Asked to all		
Q20. Which of these possible improvements would you prioritise at other sites if you could only select one?	Number	%
Security	260	21
Toilet and shower	197	16
Parking	305	25
Café	150	12
Lounge / seating area	64	5
Other	65	5
Nothing	167	14
Don't know	16	1
Total	1,224	100

Asked to all		
Q23: What is your gender?	Number	%
Male	1,205	98
Female	16	1
Prefer another term	0	0
Prefer not to say	3	0
Total	1,224	100

Asked to all		
Q24: How old are you?	Number	%
18-24	23	2
25-34	144	12
35-44	271	22
45-54	300	25
55-64	400	33
65-74	85	7
75+	0	0
Prefer not to say	1	0
Total	1,224	100

Asked to all		
Q25: How long have you been a lorry driver?	Number	%
Less than a year	15	1
1-4 years	163	13
5-9 years	177	14
10-19 years	247	20
20+ years	622	51
Total	1224	100

Asked to all		
Q26: Do you live in the UK or somewhere else?	Number	%
UK (England, Scotland, Wales, Northern Ireland)	1061	87
Somewhere else	163	13
Total	1224	100

Appendix I Contribution Analysis

I1.1 Contribution Analysis Claims

The CA included the assessment of the following contribution claims:

- C1: The investment in facilities and improved provision/quality of such facilities, contributed to increased awareness amongst HGV drivers of the wider range/improved facilities available at specific lorry parks.
- C2: The provision of more and improved facilities through the scheme increased the overall provision across lorry parks, providing drivers with better facilities.
- C3: The provision of more and enhanced facilities lead to an increase in driver satisfaction with facilities at lorry parks.
- C4: The enhancements in facilities and improvements in HGV driver satisfaction lead to an improvement in driver attitudes towards lorry parks.
- C5: The investment in security contributed to HGV drivers being more aware of the provision at specific lorry parks.
- C6: The improvements made in security measures and awareness of these amongst HGV drivers, contributed to improvements in perceptions of safety when using lorry parks.
- C7: The investment contributed to increasing the availability of parking spaces at specific lorry parks.
- C8: The availability of more parking spaces contributed to drivers feeling more confident in finding a free parking space when needed. This was also linked with the claim that additional parking provision would encourage drivers to choose to park on-site rather than off-site.
- C9: The provision of more designated/marked parking bays and wider marking within lorry parks, contributed to an improved confidence of HGV drivers to manoeuvre around sites.
- C10: The range of improvements made at lorry parks removed or at least reduced the physical and perceived barriers to using lorry parks.
- C11: Investment in facilities, parking and security lead to improved welfare and wellbeing amongst HGV drivers.
- C12: The investment in facilities, parking and security lead to an increase in driver retention.
- C13: The investment in facilities, parking and security lead to an increase in driver recruitment.

I1.2 Contribution Analysis Exclusions

As set out in Section 6, some elements of the ToC were not within the scope of the evaluation. This was due to the constraints on data collection, including the number and complexity of questions that could be included within the survey of drivers. This Appendix sets out a summary of those elements excluded from the evaluation.

The scheme increased the benefit/importance of establishing a standard for facilities at lorry parks

Associated with improvements in facilities was a causal pathway that considered benchmarking for lorry parks and wider industry accountability. The mechanism of change, as defined by the ToC, was the increased profile and investment across lorry parks, generated through the scheme, would encourage industry stakeholders to establish a formal benchmarking or standards system. Any such standard would build on the British Parking Association's Park Mark, which focused on site security. An underlying assumption was that a holistic view was being taken across lorry parks in England, bringing all funding/investment together.

Some industry stakeholders interviewed commented that a form of minimum standard should be established for facilities and parking at lorry parks, citing examples from the freight sector. They also commented on the importance of lorry park operators, as well as central funding bodies, in maintaining high quality facilities, as these were important for driver wellbeing and comfort.

The in-depth interviews with HGV drivers and industry stakeholders generated comments about the standard of facilities, parking and security at lorry parks and the importance this has in encouraging use and raising quality. However, there was no evidence that the scheme had contributed to any changes leading to the introduction of a comprehensive standard/benchmark for lorry parks. Discussions with industry stakeholders highlighted that operators continue to seek Park Mark accreditation but that there was currently no intention to establish a minimum standard for facilities and parking.

Contribution to wider crime levels

The ToC included a first order outcome relating to a reduction in incentives for criminals to target lorry parks, following investment in security measures e.g. fencing and gates. It was anticipated that investment in security measures would reduce the likelihood that lorry parks would be targeted by criminals. The introduction of both gating and fencing at 11 lorry parks, and a further six improving either gates or fencing, was likely, in the view of industry stakeholders, to have contributed to discouraging criminals. Furthermore, industry stakeholders noted that improvements in CCTV were designed to enhance the detection of crime and would act as a longer-term deterrent to criminals. Gates, fencing, CCTV and lighting were all parts of the BPA's Park Mark criteria for secure sites, so all such improvements were in line with industry best practice.

However, there were no lorry park specific crime statistics provided for analysis as part of the evaluation and the driver survey did not include questions on observed crime levels as the achieved sample would not have provided robust enough numbers to support reliable assessment of the data. Multiple external factors, such as Police activities, may have also contributed to the behaviour and decisions of criminals, making it difficult to measure objectively. It was also noted by DfT stakeholders that MSAs continue to be more vulnerable to freight crime than smaller lorry parks, as it is more difficult to create enclosed and secure environments.

HGV drivers exposed to crime at non-lorry park locations

The driver survey also did not include questions related to exposure or experience of crime, as capturing reliable insights on this topic would have required a much larger sample size than was achieved. Furthermore, the evaluation did not assess the National Vehicle Crime Intelligence Service (NaVCIS) data due to access issues. As a result, the evaluation was unable to assess whether the scheme parking and security improvements had reduced exposure to crime at lorry parks.

There was no evidence and a low level of confidence to support the claim that the scheme contributed to the third order outcome of reducing the number of drivers exposed to HGV related crime. Whilst there was anecdotal evidence from in-depth interviews, this was not supported by any crime data or through the driver survey, thus reducing confidence.

