

Chapter 1: Introduction



1 Introduction

1.1 Introduction

AECOM was commissioned by the Department for Transport (DfT) to undertake a research study on the subject of lorry parking demand in England.

This research is about providing information on lorry parking demand to help stakeholders make decisions. Through a well informed understanding of lorry parking demand it will be possible to take targeted action that is backed by an evidence base. The results of this research therefore act as an effective foundation tool to help DfT and other stakeholders implement initiatives associated with lorry parking.

As an information source it is hoped this research will empower decision making at the local level. However, it is important to note that the research is not targeted to any one specific stakeholder. It is intended to be open and used by any public or private stakeholder that has an interest in lorry parking.

1.2 Aims and Objectives

The main objective of this lorry parking research was to undertake a review of lorry park locations and the associated demand for lorry parking on and off-site. To meet this objective the project was split into four main tasks, which are as follows:

- Determine and map the number, type and capacity of lorry parks;
- Determine and map the utilisation of lorry parks;
- Determine and map the extent of other indicators of demand; and
- Determine hotspots of Heavy Goods Vehicle (HGV) related crime.

The main output of this research project was to analyse the results on a national, regional and local basis. These different levels of analysis allow for comparisons to be made, and for information to be interrogated at levels relevant to a wide range of stakeholders.

1.3 Project Overview

Lorry parks provide an essential service to the road freight industry. They are important in terms of road safety, preserving local amenities, reducing crime, and addressing the general needs of HGV drivers' dignity. They also help to ensure seamless compliance with the European Union (EU) Drivers' Hours Rules. The DfT are the policy lead on lorry parking in the UK and recognise that there is a need to support such services. On a national level there is a need to create an environment which reduces the current barriers hampering development, improves financial stability and provides adequate standards.

There is a continuing concern among the trade press, trade associations and wider stakeholders that many drivers are facing difficulty in finding safe and secure places to take required breaks. This is compounded by perceptions of policy and development barriers. Previous research does suggest that once the 'mask' of average utilisation of lorry parking is uncovered, that there are many hotspots suffering from either over utilised facilities, or simply a lack of any adequate facilities at all.

In response to such concerns this research project provides a range of information that helps to act as an evidence base to determine the extent of the perceived problems and issues facing many areas in England. This includes:

- Information on the number, capacity and usage (utilisation) of lorry parks in England and the key problem areas where shortages potentially exist.
- The identification of hotspots of off-site parking and whether nearby lorry parks have available space or not. This shows where issues may not be directly linked to a lack of available space.
- An analysis of the correlation between road freight crime locations and other outputs of the project. This helps to determine whether crime can be linked to high demand and vehicles parking off-site.

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1.3.1 Benefits for Stakeholders

The information provided in this document will assist decision makers at every level to identify lorry parking demand issues and potential solutions. To demonstrate the range of stakeholders that can benefit from this research and why, the following examples are listed:

- *Local Authorities:* This study identifies the level of capacity, on-site and off-site parking, as well as the amount of crime in each local authority. By showing the exact location of off-site parking it allows local authorities to examine particular problem areas and design appropriate actions to rectify the situation in a targeted way. This information also allows local authorities to co-ordinate their efforts, where necessary, with other local authorities and stakeholders to maximise the possible gains. Furthermore, local authorities may have the opportunity to use this information to support the private sector to bring forward lorry parking developments. This could be through using the evidence to inform development / revision of Local Development Documents and potentially allocate suitable land for lorry parking.
- *Private Operators and Developers:* Will be able to use the information to support planning and business case development for potential expansions, or building of new sites. This research helps to assess the scale of demand not only at their (potential) site but in the surrounding area. It may also help them explore Grant based funding from Europe or contact Local Authorities to understand what land may be available. This report therefore contributes to providing stronger evidence to show where lorry parks could be a viable business proposition.
- *Highways Agency (HA):* Will also be able to utilise the information in identifying shortages of provision and high levels of off-site parking and prioritise areas they own for investigation and land allocation on the Strategic Road Network (SRN). The HA can use the information provided in a targeted, informed manner and in collaboration with private operators, local authorities and the DfT. This will provide the information to help make decisions for potentially reducing off-site parking on the SRN and improving safety, standards of facilities and security. It must be clarified that responsibility for bringing forward and operating lorry parks on the SRN sits with the private sector, and this policy position is unlikely to change. However, the HA can provide a positive role by providing supporting information, such as policy.
- *DfT:* As the policy lead this report will help the DfT to formulate policies to assist other stakeholders in meeting the strategic requirements of lorry parking in England. This will help to agree responsibilities and required resource allocation. It must be clarified that responsibility for bringing forward and operating lorry parks sits with the private sector, and this policy position is unlikely to change. The DfT will however provide a supporting role in terms of policy direction and information. Linked to providing information and building on the evidence in this report, it will be possible for the DfT to use the parking survey data to contribute towards a model that can analyse future demand. It must be noted that any model that looks at future parking demand would have to factor in demand created as a result of new development or changes to economic profile of the localities. This is particularly important given that local economic profiles are going to / will have changed as a result of adjustments forced by issues related to the national and global economy. This information has not been researched as part of this study.
- *Transport Managers and Drivers:* There will be the indirect benefit from other stakeholders coming together to take action, helping to improve access and availability of lorry parking across the network. Higher standards and more readily available parking locations will improve the welfare of drivers. There are also direct benefits of the research, as it could be used as an information source to help plan operations e.g. planning routes around areas of low crime and where parking is more likely to be available.

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1.3.2 Additional Background

The issue of lorry parking has been increasing in prominence at the European level, particularly over the past 3 years. A number of projects have been undertaken by AECOM and other stakeholders over this time. This includes:

- Secure European Truck Parking Operational Services (SETPOS) www.setpos.eu
- Truck Parking Label www.truckparkinglabel.eu
- Easyway www.easyway-its.eu

Belgium also held the Presidency of the Council of the European Union during the second half of 2010. During this period the problem of cargo theft and the idea of secured parking areas were re-affirmed on the political agenda. A Council Resolution on "Combating Road Freight Crime and Providing Secure Truck Parking Areas" was adopted on 8 November 2010 by the EU Ministers of Internal Affairs and Justice. www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/trans/117580.pdf

At a national level steps have already been taken by the DfT and HA to start a process of dealing with the issue of lorry parking. In 2009 a baseline report was released detailing a current understanding of lorry parking issues facing the freight industry www.tap.iht.org/objects_store/200911/lorrybaseline.pdf.

The baseline report helped to devise the lorry parking strategy for England, which was also released in 2009 www2.dft.gov.uk/pgr/freight/road/lorryparking.pdf. From this strategy two important action points have now started to be delivered, including:

- 1) *Action Point 1: Lorry Parking Model (Capacity and Demand); i) Collection of baseline information and output of current situation.* This action point directly relates to this research study.
- 2) *Action Point 2: Policy and Planning.* Progress on this action point has been made by the release of Mike Pennings written statement (June 2011) on "Policy on service areas and other roadside facilities on motorways and all-purpose trunk roads in England" www.dft.gov.uk/news/statements/penning-20110622b/.

From this background it is clear that there is a desire to make progress on the issue of lorry parking. The recent statement by the Parliamentary Under-Secretary of State for Transport (June 2011) also underlines the Government's twin aims of decentralisation and localism, reducing the burden of bureaucracy and strengthening local accountability.

1.4 Definition of Key Terms

To assist the communication of results and to support the understanding of this research it is important from the outset to clarify the meaning that has been attached to certain terms and abbreviations used throughout this report. These are as follows:

- *Lorry Park*: a broad term covering all parking areas deemed to be on-site from a local council car park which allows overnight lorry parking to a secure independent facility. This does not include 'operator' premises which limit the use to their company vehicles only. Parking can either be free or require payment at the choice of the owner whether this is a private company or a local council.
- *On-site Parking*: defined as anything parking in a lorry park.
- *Off-site Parking*: defined as anything parking in an industrial estate (not on operator premises) or lay-by.
- *Appropriate*: on-site parking is deemed appropriate.
- *Inappropriate*: off-site parking is deemed as inappropriate.
- *Industrial Estate*: an area which is designated for industrial business purposes.
- *Lay-by*: an area beside a road where vehicles can park, usually intended for emergencies or for a short period only.
- *Trunk Road Service Area (TRSA)*: a lorry park which is signed from a truck road.

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- *Motorway Rest Area (MRA)*: a lorry park which is signed from a motorway but does not meet all the requirements to be a motorway service area.
- *Motorway Service Area (MSA)*: a lorry park which is signed from the motorway and provides at least 2 hours free parking, free toilets, fuel and are open 24 hours a day.
- *Independent Facility*: a lorry park which operates privately, this can include secure modern facilities down to basic facilities.
- *Local Authority Parking*: a lorry park which is operated by a local council, generally these are council car parks which allow overnight lorry parking.
- *Services*: what is available at the lorry park for drivers to use, for example restaurants, showers, toilets and washing facilities.
- *Security*: the infrastructure and systems at the lorry park which aim to reduce the risk of theft or damage to goods, vehicles and drivers parked in the lorry park such as CCTV, guards, entrance barriers and fencing.
- *Facilities*: what is provided by lorry parks and includes services and security.
- *Capacity*: the total number of vehicles that could park in a lorry park.
- *Utilisation*: how busy the lorry park is as a percentage of number of vehicles parked compared to the capacity.
- *Spaces*: these are defined as being able to fit a 44T articulated vehicle. The number of spaces determines the total capacity.
- *Demand*: vehicles wanting to park; sometimes split between on-site demand and off-site demand.
- *Excess Demand*: the total number of vehicles parking on and off-site, minus the total capacity e.g. at a regional or local level.
- *Strategic Road Network (SRN)*: the road network maintained and operated by the Highways Agency (HA). It includes all motorways and major trunk roads. The vast majority of long distance trips take place on the SRN.
- *National*: for the purposes of this study this is defined as England.
- *Regional*: defined by the nine regions which make up England (same as the NUTs level 1 regions)¹. Used as a simple method to make the analysis more manageable, and does not in any way relate to possible actions or responsibilities.
- *Local*: a geographical division which is smaller than the region, and is also referred to as a 'local authority'.
- *Authority*: the local authority boundaries which have been used to further disaggregate the survey data to the local level to assist the analysis. This does not refer to the local government body being fully responsible for the results in an area.
- *Freight Crime*: this is any crime targeting road based freight; the figures used in this report are compiled by Truckpol 2010.

1.5 Structure of Report

This report has been structured as follows:

Chapter 1 – Introduction
Chapter 2 – Methodological Approach
Chapter 3 – National Analysis
Chapter 4 – Regional Analysis
Chapter 5 – Local Analysis
Appendices

¹ http://epp.eurostat.ec.europa.eu/portal/page/portal/nuts_nomenclature/introduction