



**TRUCK STOP
SERVICES IN B.C.
MARKET RESEARCH**

HIGHWAY REST AREA SURVEY REPORT

September 2016

Davies Transportation
Consulting Inc.

Wave Point Consulting Ltd.

S5 Services

Site Economics



Ministry of
Transportation
and Infrastructure

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1 EXECUTIVE SUMMARY

The British Columbia Rest Area Survey was commissioned by the B.C. Ministry of Transportation and Infrastructure to gather information on commercial truck drivers' use of private truck stops and highway Rest Areas, to identify the Rest Area services which are most important to them, and obtain their views on potential additional Rest Area locations and services. The consulting team engaged to undertake the project was led by Davies Transportation Consulting Inc. (DTCI), in collaboration with Wave Point Consulting Ltd., S5 Services and Site Economics Ltd.

The on-line survey was conducted between January 11 and January 31, 2016. The survey generated interest among commercial truck drivers, with 835 respondents participating and 574 completing all questions including those that required providing written remarks. Key findings of the survey included:

- 90% of respondents indicated that they would support additional paid services such as fast food restaurants, convenience stores, showers, and fuel stations.
- 83% of those surveyed wanted better rest area amenities. The highest ranked improvements (in order of priority) were more truck parking, upgraded restroom with flush toilets, and improved lighting.
- 82% of respondents would like more rest areas.

These, and the greater detail within the report, will assist the Ministry of Transportation and Infrastructure in planning for Rest Area improvements and further help expand the services available at B.C.'s public Rest Areas.



2 INTRODUCTION

The British Columbia Rest Area Survey was commissioned by the B.C. Ministry of Transportation and Infrastructure to gather information on commercial truck drivers' use of private truck stops and highway Rest Areas, to identify the Rest Area services which are most important to them, and obtain their views on potential additional Rest Area locations and services. The consulting team engaged to conduct the study was led by Davies Transportation Consulting Inc. (DTCI), in collaboration with Wave Point Consulting Ltd., S5 Services and Site Economics Ltd.

The survey questions were developed with input from BC MOTI, and consultation with the BC Trucking Association (BCTA) and Trucking Safety Council of BC. The final survey included a total of 31 questions, and a mixture of closed-ended questions (i.e. where survey respondents pick among a selection of answers) and open-ended questions (where respondents typed in unique responses). To ensure that the survey was completed only by the target audience of commercial truck drivers, respondents who indicated they did not fit into this category were automatically transferred to the last question of the survey which allowed them to express their views without completing the detailed survey questions.

The survey collected data on demographics (age, gender), years of experience

of the respondents and basic information about the vehicle type. It also collected data on their most recent trip in B.C., including trip origin and destination, type of location and purpose of first and second stops (if applicable), rankings of current Rest Area locations and services, and commercial services which drivers might like to see made available at Rest Areas.

The on-line survey was conducted between January 11 and January 31, 2016. The average time required to complete the survey was 12 minutes.

Acknowledging the following associations:

Alberta Motor Transport Association

Saskatchewan Trucking Association

Manitoba Trucking Association

Ontario Trucking Association

Quebec Trucking Association

Atlantic Provinces Trucking Association

Northern BC Truckers Association

Washington Trucking Association

The survey communications strategy included cooperation from BCTA and provincial associations in promoting the survey to their members; social media; and printed handouts. BCTA used their electronic newsletter and website to request industry participation in the study. In addition, Ministry of Transportation and Infrastructure officials from the communications branch and at regional level used social media and distributed a handout to truck drivers at commercial weigh scales. In addition, the study team used both free and paid social media tools to promote awareness of the study.

Of the 1,740 individuals who viewed the landing page summarizing the survey's purpose, 835 started the survey. Since none of the questions were mandatory, respondents could choose their level of survey participation. As a result, 574 individuals completed the entire survey for a 68% completion rate. The open-ended questions were generally the ones where some of the survey respondents chose not to provide a response. While the focus of the survey was on commercial truck drivers, the survey did provide an open ended question that allowed anyone to provide their views by way of a written response. This feature was used by 274 individuals.

The sample size provides assurance that the views expressed in the survey responses are broadly representative of commercial truck drivers using the B.C. highway network.

3 SURVEY DEMOGRAPHICS

3.1 Demographics

Fig. 1 Rest Area Survey Respondent Age Profile

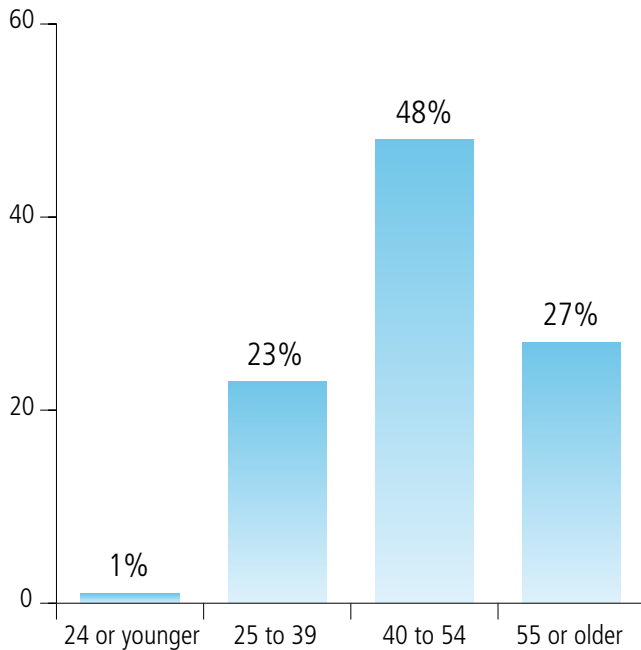
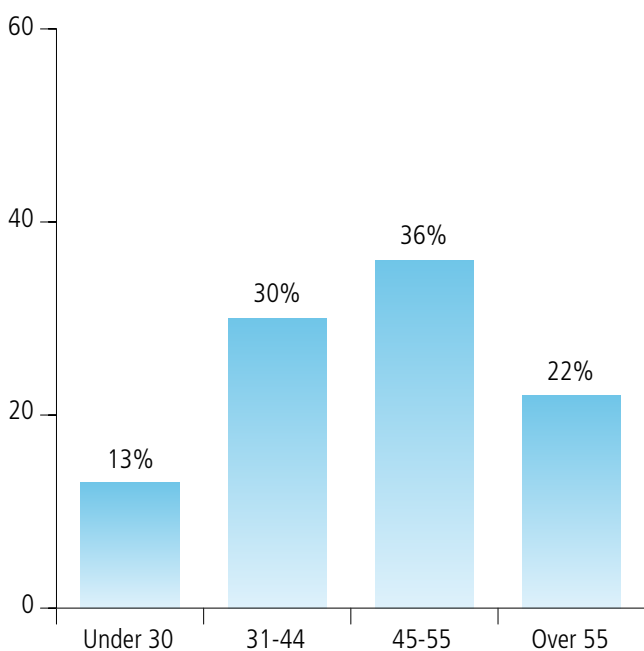


Fig. 2 CTHRC Survey Respondent Age Profile (Class 1/AZ) Drivers



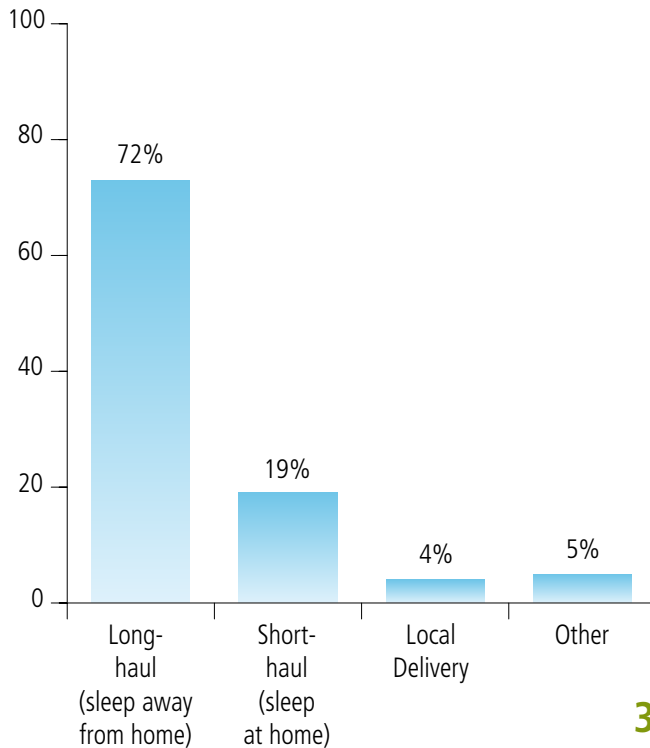
Drivers over 40 years old accounted for 75% of the survey respondents, with drivers between 25 and 39 accounting for an additional 23%. There were very few respondents under 25.

The age distribution of the survey sample relative to the Canadian industry can be seen in the figure below, which shows the Rest Area survey demographic data and that reported in a major survey conducted for the Canadian Trucking Human Resource Council (CTHRC) in 2012 to develop an industry-wide profile of the trucking labour force in Canada.

Note that the age categories reported in the CTHRC survey do not exactly match those in the Rest Area survey, except for the oldest category (over 55). This age group accounted for 27% of the Rest Area survey sample compared to 22% for the CTHRC study. The low level of participation in the Rest Area survey by younger drivers is consistent with industry demographics. In the Rest Area sample, 93% of survey respondents indicated they are male and 7% indicated they were female. In comparison, the CTHRC survey results indicated the share of female drivers in the Class1/AZ category was only 4%. Thus, we were able to capture a high rate of female participation in this current survey.

3.2 Industry Sector

Fig. 3 What type of commercial driver are you?



Eighty-two percent (82%) of respondents indicated they are commercial truck drivers. For purposes of the study, it was important to categorize drivers between long haul drivers (defined as drivers who sleep away from home for work) and short haul drivers because it affects the type of services that may be desired; i.e. long haul drivers are more likely to make use of long term parking options for mandatory rest periods required by Hours of Service (HOS) regulations. In the Rest Area survey sample, 72% indicated that they are long haul drivers (i.e. they sleep away from home for work, and 19% indicated they are short haul drivers (sleep at home).

In order to take advantage of private truck stops or Rest Areas for rest periods, the truck must be equipped with a sleeper cab. In the survey sample, 84% of respondents indicated their truck is equipped with a sleeper cab.

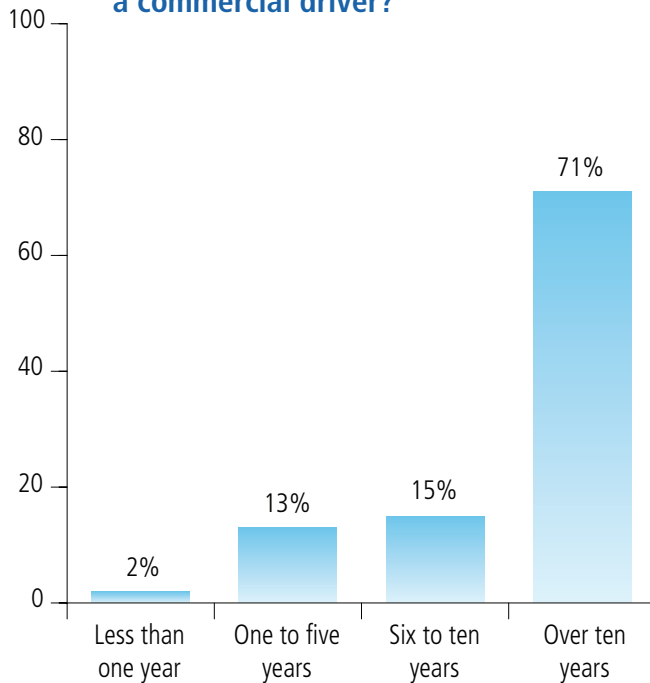
3.3 Employment Status

Drivers typically belong to one of two employment categories. Employee drivers drive their employer's equipment and are paid a wage or salary. Owner-operators own their own truck (and sometimes the trailer as well) and are paid on a trip or mileage basis. For the Rest Area survey, 60% of drivers identified themselves as employees and 40% identified themselves as owner-operators.

Overall, 87% of drivers indicated they have complete freedom to decide where to stop on their trip. Of the remainder, 4% indicated they can choose from an approved list of stops, 3% indicated that their company specifies the locations where they are allowed to stop and 6% had other options.

3.4 Experience

Fig. 4 How long have you been a commercial driver?



By far the largest share (71%) of survey respondents indicated they have over 10 years of experience as a commercial driver. As such, these drivers had extensive experience with the Highway Rest Areas in B.C. and in other jurisdictions in which to make comparisons and form opinions on what makes for a good Rest Area.

The trucking industry has for some years expressed concern regarding difficulties in recruiting new drivers to the industry. The composition of the survey sample provides some evidence of this, as the vast majority of drivers have been in the industry for 6 years or more, and only 15% for 5 years or less.



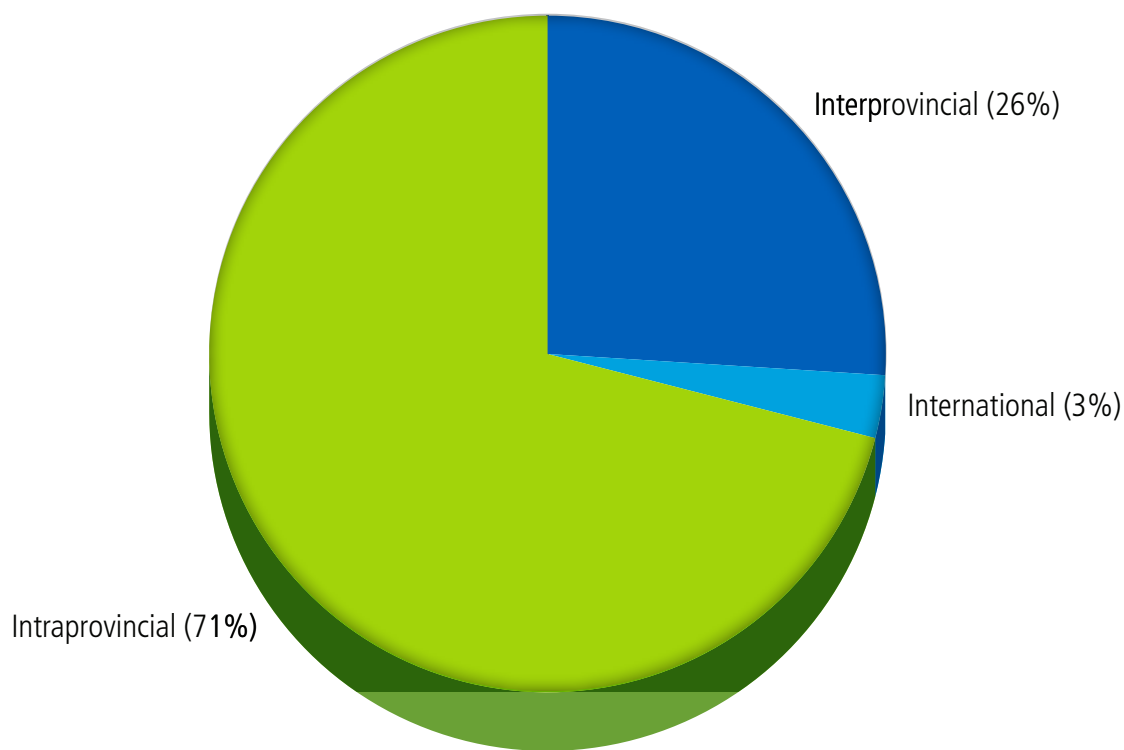
4 TRIP PROFILES

The survey included questions on respondents' most recent trip as a commercial truck driver in B.C. The purpose of these questions was to assess the responses regarding specific truck stop or Rest Area locations relative to the number of respondents using a particular highway, and to gather data on drivers' actual use of private truck stops and/or public Rest Areas on their last trip. In addition, data on trip origins and destinations provides an indication of trip lengths.

4.1 Trip Types

The distribution of trips by type (intraprovincial, interprovincial or international) is shown below. Intraprovincial trips (i.e. trips within B.C.) accounted for 71% of total trips, compared to 26% for interprovincial trips (primarily to or from Alberta) and 3% international trips with either the origin or destination in the U.S.

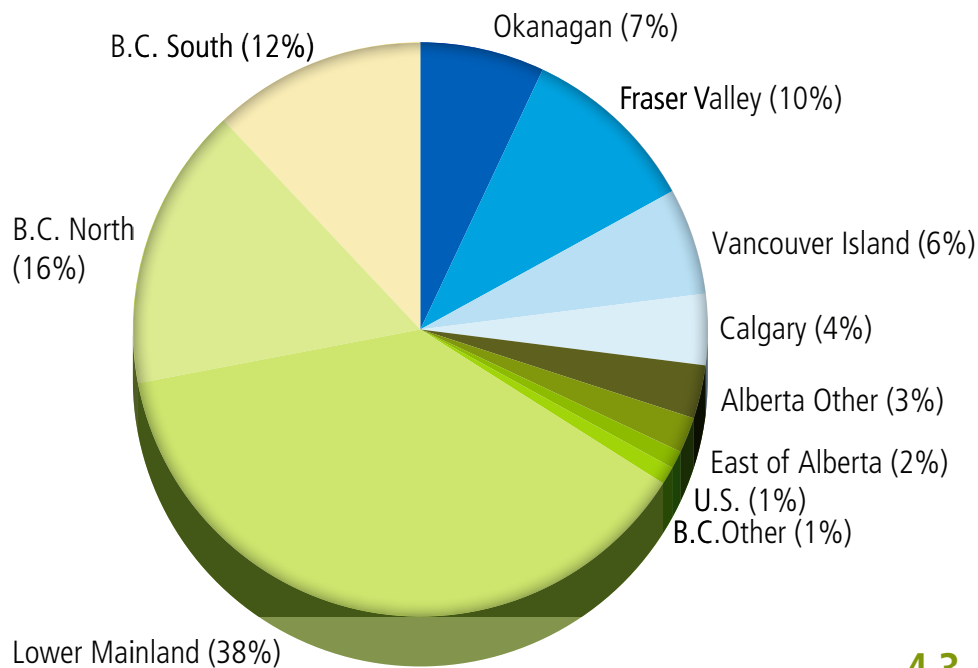
Fig. 5 Rest Area Survey Trip Types



4.2 Trip Origins

The distribution of trip origins reported by Rest Area survey respondents is shown below. Almost 50% of trips originated in the southwest corner of the province: the Lower Mainland accounted for 38% of trip origins and the Fraser Valley for 10%. B.C. North accounted for 16% and the B.C. South (excluding the Okanagan) accounted for 12%.

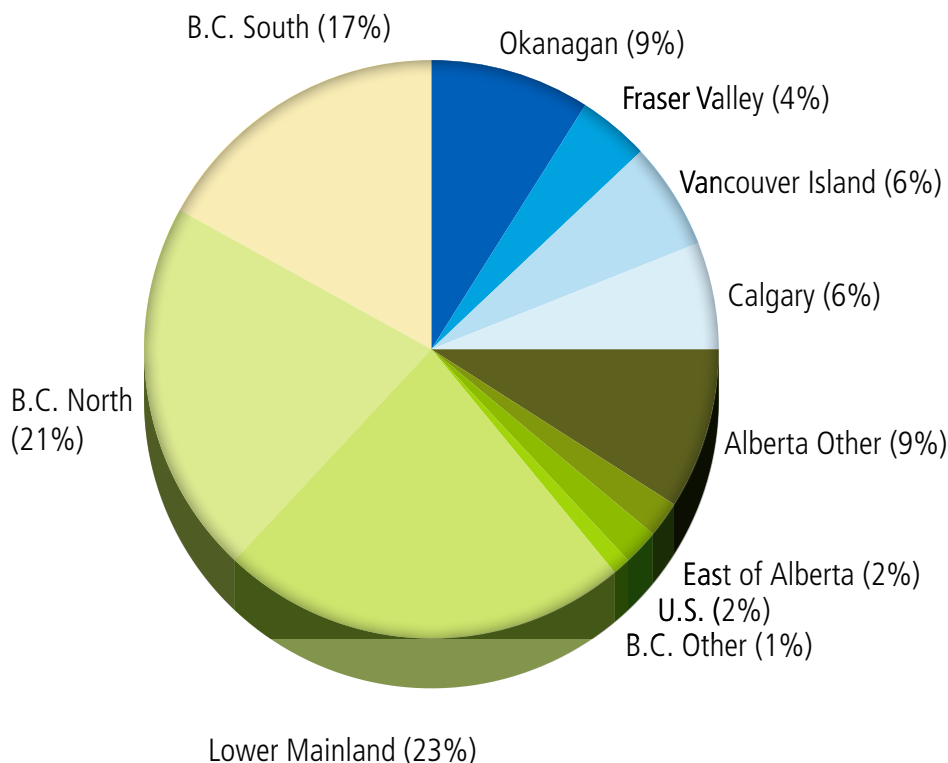
Fig. 6 Rest Area Survey Trip Origins



4.3 Trip Destinations

The distribution of trip destinations reported by Rest Area survey respondents is shown below. The Lower Mainland, B.C. North and B.C. South regions accounted for the largest shares of trip destinations (23%, 21% and 17% respectively).

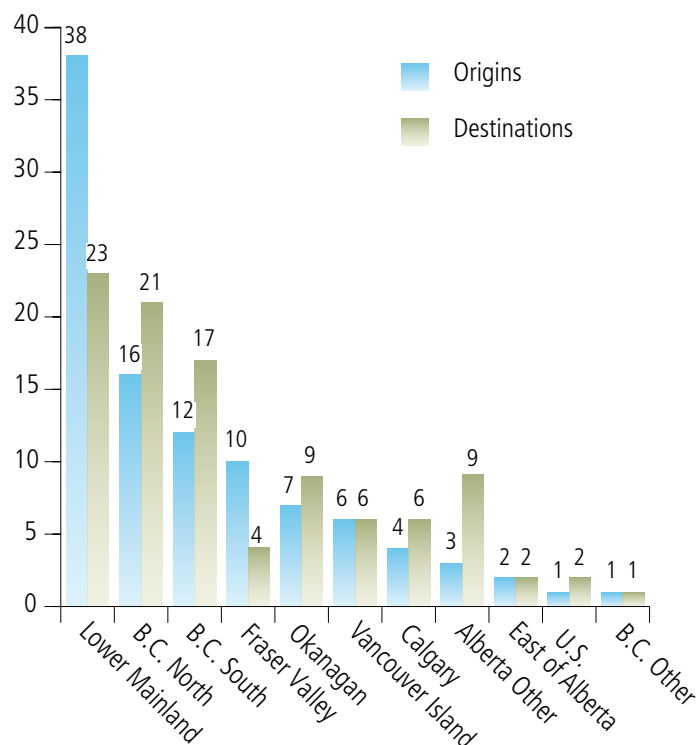
Fig. 7 Rest Area Survey Trip Destinations



4.4 Trip Origins vs Destinations

A comparison of regional trip origin and destination shares is shown below. The data indicates that The Lower Mainland and Fraser Valley accounted for a much larger share of trip origins than destinations, while the reverse was true for all other regions except Vancouver Island, where the shares are approximately evenly balanced.

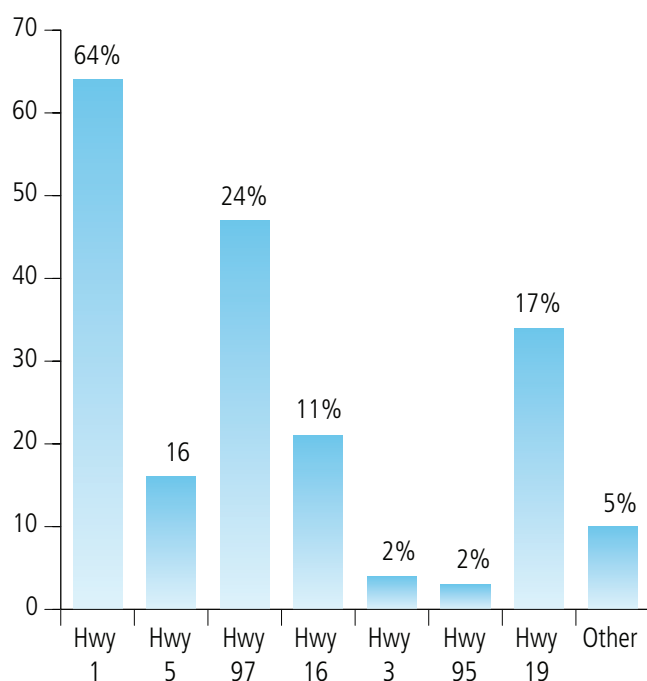
Fig. 8 Origin and Destination Trips by Region (%)



4.5 Highways Used on the Most Recent Trip

The main highways used by survey respondents on their most recent trips are shown below.

Fig. 9 Identify the main B.C. highways used on your last trip.



The pattern is similar to that indicated by BC MOTI traffic count data for heavy trucks, which shows the highest level of heavy truck traffic on Highway 1, with an Average Annual Daily Traffic (AADT) level of over 5,000 heavy trucks per day on Highway 1 in the Fraser Valley; approximately 2,500 on the Coquihalla Highway (Highway 5) linking Highway 1 in the Fraser Valley and Kamloops; and about 700 on Highway 97 between Kamloops and Prince George.

5 DRIVER STOPS ON THE LAST TRIP

Fig. 10 During your last trip, what type of facility did you use on your first stop in B.C.?

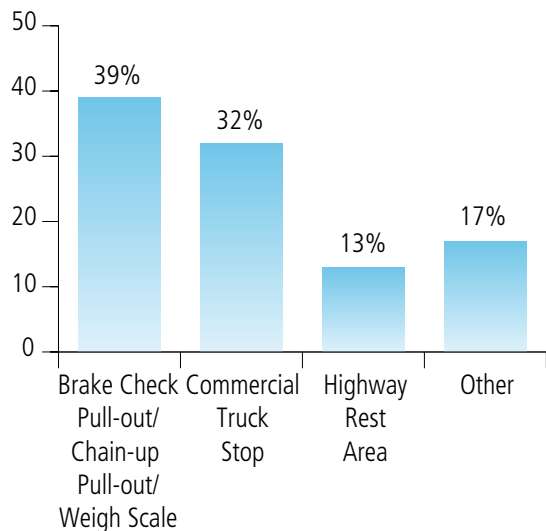


Fig. 11 What was the primary purpose of your first stop in B.C.?

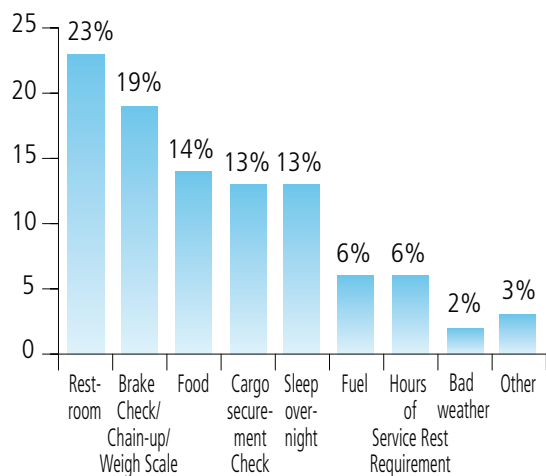
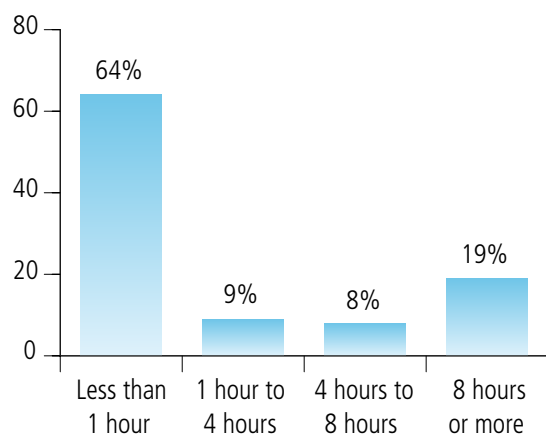


Fig. 12 How much time did you spend at your first stop?



The survey included questions on driver behaviour with regard to stops made in the course of their most recent trip.

5.1 First Stop

Most drivers (81%) indicated that they stopped at least once on their most recent trip. The distribution of stops by facility type is shown below.

The “Other” category included a variety of different locations, including street parking, restaurants, parking lots, and the side of the highway.

The most common reason for stopping was use of the restroom. Public highway Rest Areas were the least frequently mentioned location for a driver’s first stop in British Columbia. Female drivers were more likely than male drivers to use a private truck stop as the location of their first stop in British Columbia.

Checks on the truck (brakes) or load (cargo securement), chaining up for winter driving, or pulling in to a weigh scale accounted for 32% of stops. Close to 20% stopped to sleep overnight or to take a rest break required by Hours of Service regulations. Food was the primary reason reported for stopping for only 14% of respondents, and fuel for only 6%. “Other” reasons for stopping included compliance with permit restrictions and rest breaks mandated by employers.

Most drivers stopped only briefly at their first stop, staying for less than an hour. The share who reported staying for 8 hours or more is 19%, the same share as the drivers who reported stopping to sleep overnight or take a rest required by the HOS regulations.

Fig. 13 During your last trip, what type of facility did you use on your second stop?

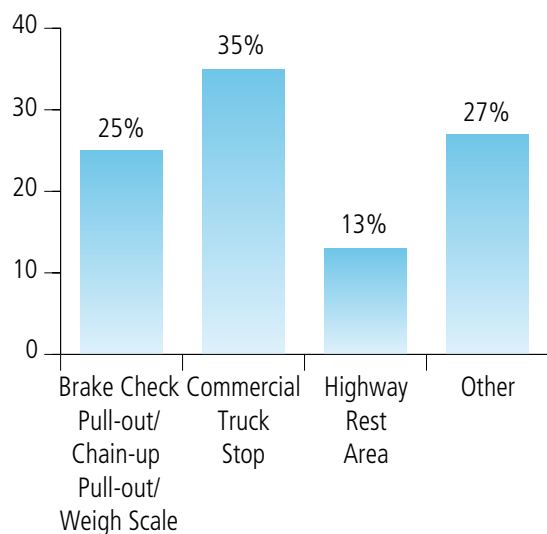


Fig. 14 What was the primary purpose of your second stop?

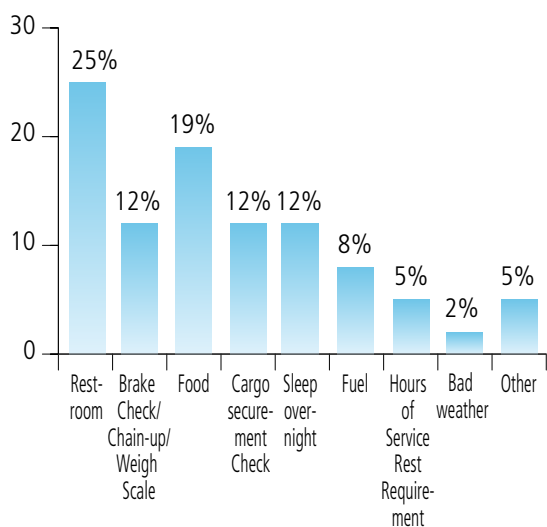
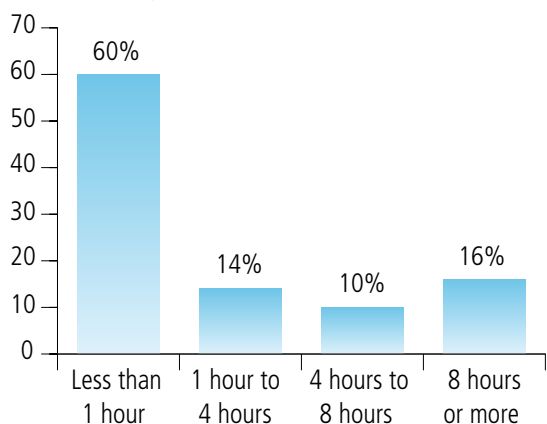


Fig. 15 How much time did you spend at your second stop?



5.2 Second Stop

The majority of long-haul commercial truck drivers have a need to make a second stop on their journey in British Columbia. Of the drivers who made at least one stop on their last trip, 73% made a second stop. The distribution of these stops between different types of facilities is shown below.

For the second stop, a private truck stop was the most popular choice, followed by a highway pull-out or weigh scale. Public highway Rest Areas were used by only 13% of respondents for their second stop, the same share as for the first stop.

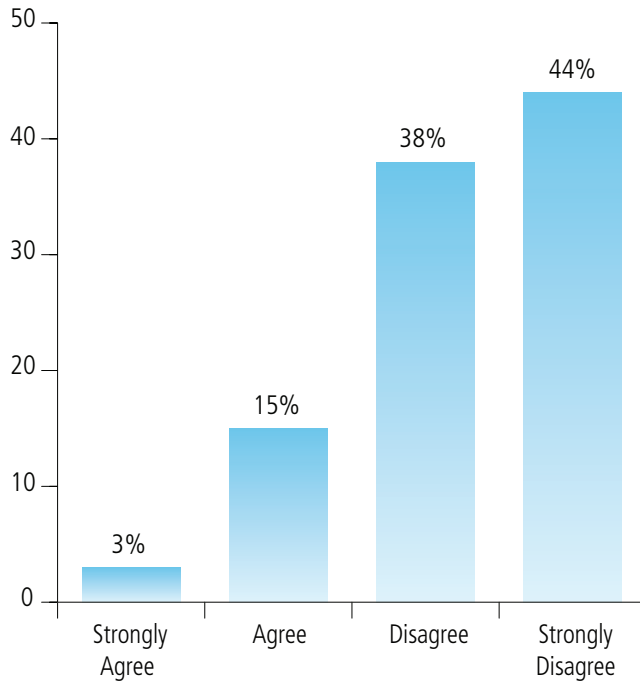
The primary reasons for stopping reported for the second stop were similar to those for the first stop, though a larger share of drivers indicated food was the primary purpose for the second stop (19%) than the first (14%).

The distribution of responses regarding time spent at the second stop was also similar to that for the first stop, with 60% staying for an hour or less.

The survey results indicated that female drivers are more reliant on public highway Rest Areas as the location of their second stop in B.C. than the male drivers. Younger drivers also had a greater need to sleep overnight as the reason for their second stop in B.C.

6 REST AREA LOCATIONS

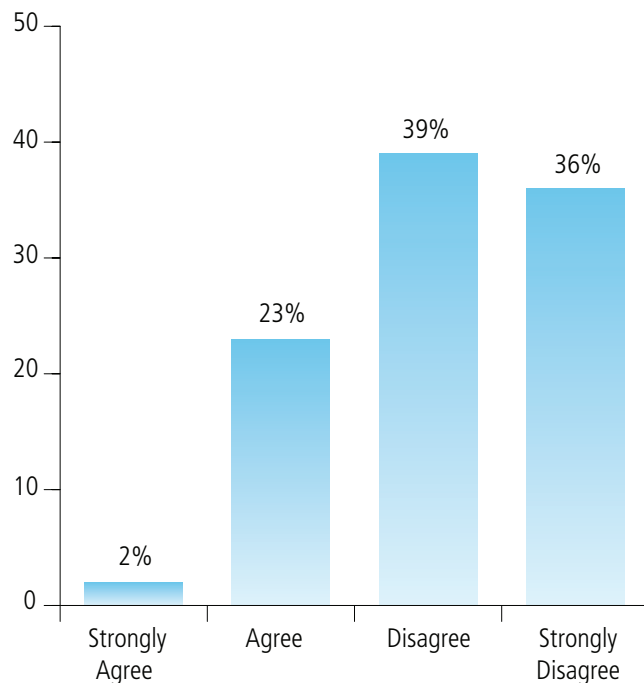
Fig. 16 Were there enough Rest Areas along my route?



Drivers were asked several questions regarding the number and locations of existing public Rest Areas, and potential sites for new facilities.

Drivers were asked whether there were enough Rest Areas on the route taken on their most recent trip. The responses suggest that drivers want more public Rest Areas throughout the province, as most (82%) of those who responded disagreed or strongly disagreed with the statement "there were enough Rest Areas along my route."

Fig. 17 Rest Areas were located in suitable locations.



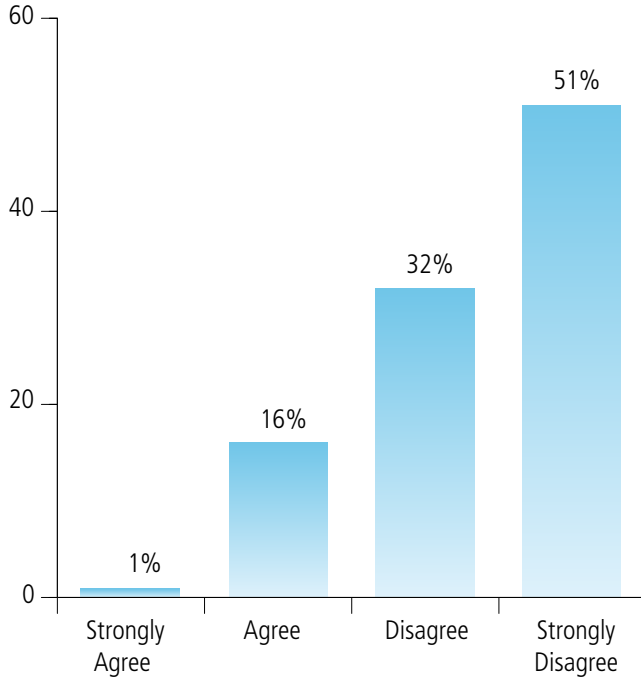
The survey results show that 75% of respondents feel the existing public rest areas could be in better locations. Responses varied little between individual highways

7 REST AREA AMENITIES

7.1 Current Rest Area Amenities

Drivers were questioned regarding their satisfaction with the level of amenities provided at public Rest Areas (parking, washrooms, picnic areas, etc.). Eighty three percent (83%) of respondents disagreed or disagreed strongly with the statement, "I am happy with amenities provided in Rest Areas."

Fig. 18 Happy with the amenities provided in Rest Areas.



7.2 Rest Area Improvements

A large majority of drivers (79%) indicated that there are locations where they would like to see public Rest Area improvements. Responses varied little between individual highways.

In addition to highway Rest Areas, respondents also suggested that improvements be made at:

- Brake checks,
- Chain up areas,
- Commercial scales.

Fig. 19 Rest Area improvements required.

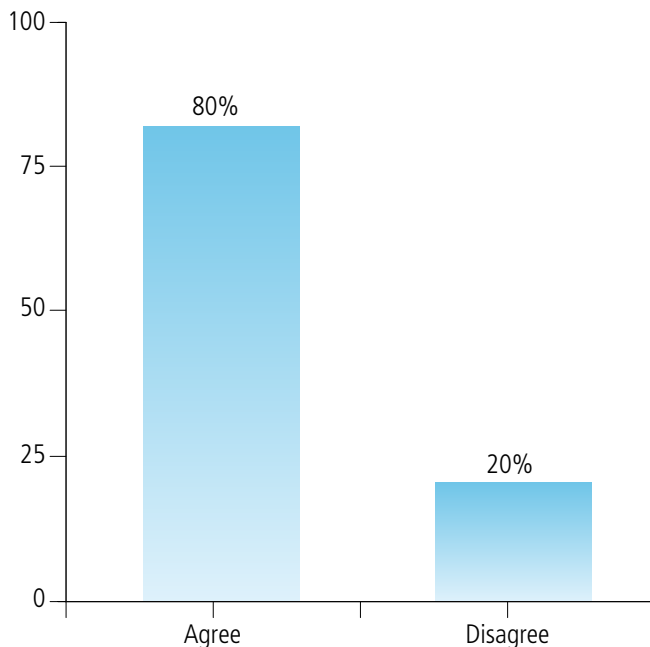
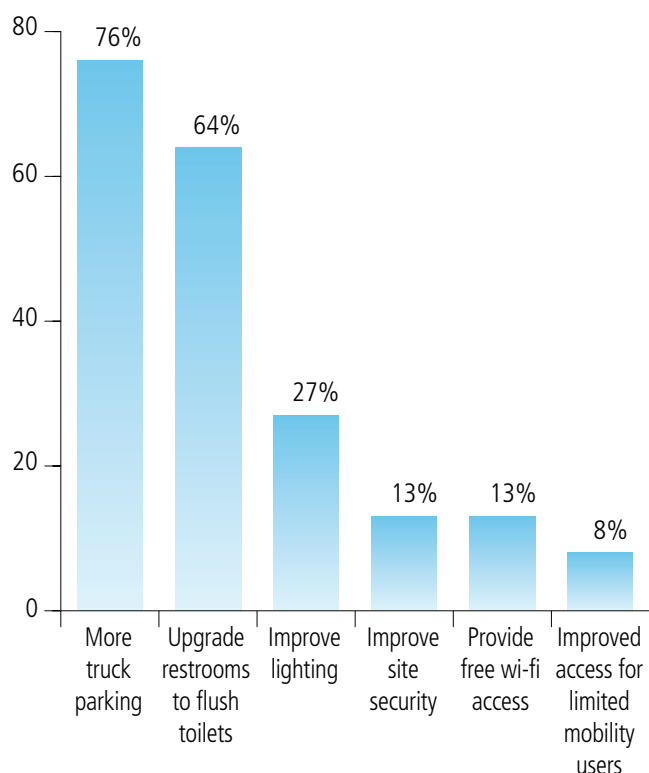


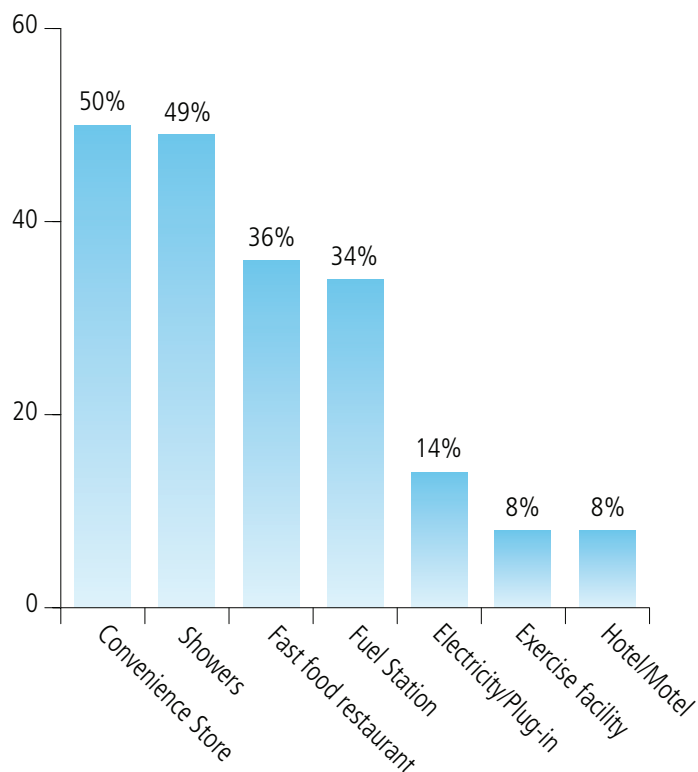
Fig. 20 Improvements to existing Rest Areas drivers would like to see.



7.3 Improvements to Existing Services

Drivers were asked to rank the improvements they would like to see at existing Rest Areas. The figure below shows the percentage of respondents who ranked each of the suggested improvements either first or second. The most popular suggestions were more truck parking and upgrading restrooms to flush toilets, followed by improved lighting.

Fig. 21 Paid Services Drivers would like to see at Rest Areas



7.4 Paid Services at Rest Areas

90% of respondents indicated they would support additional paid services, such as a fast food restaurant, convenience store, and fuel station, being available at some Rest Areas, in addition to existing free services (parking, restrooms, and picnic spaces). This positive response supports the conclusion that drivers would be generally supportive of additional paid services.

Drivers were asked to rank the types of services they would like to see offered at Rest Areas. Based on the services which respondents identified as their first or second choice, the most popular services would be a convenience store and showers, followed by a fast food restaurant and fuel station.

8 OPEN-ENDED RESPONSES

The survey included a number of open-ended questions which allowed respondents to type in extended answers which provided unique feedback.

8.1 Examples of Good Rest Areas

Drivers were asked to identify examples of good Rest Areas and 417 responded. Public Rest Areas cited as good examples include Bradner (Highway 1), Britton Creek (Highway 5), Terry Fox (Highway 16) and Zopkios (Highway 5).

In addition, many cited American highway Rest Areas as good examples (examples include Interstate 90 and Interstate 5).

8.2 Attributes of a Good Rest Area

The following site specific attributes emerged from the open-ended questions. Recurring themes among respondents' answers included:

Location:

- Preferably at the top of a hill
- A short distance from the highway
- Good sound-proofing such as thick vegetation between the highway and Rest Area

Access:

- Easy access when exiting the highway, preferably slightly uphill
- Easy access when entering the highway, preferably slightly downhill
- Good sightlines when exiting/entering the highway

Washroom:

- Clean washrooms
- Flush toilets
- Heated washrooms
- Running water



Lighting and Security:

- If drivers have chains on then they prefer to take them off in a well lit Rest Area
- Lighting to aid in inspecting the truck for safety issues, and to increase site safety

Parking:

- Ample parking area
- Plowed and sanded in the winter
- Separation and parking enforcement for recreational vehicles
- 4+ hour parking in a quiet corner

Size:

- Parking spaces for up to 40 to 50 trucks but no less than 10 truck parking spaces

Other Features:

- Cellular service
- Wi-fi
- Garbage removal
- Pet run area

8.3 Locations for Rest Area Improvements in B.C.

Survey respondents' views on locations for new highway Rest Areas were mixed. Respondents suggested optimal spacing of Rest Areas 50 km, 80 km, 100 km, 150 km and 300 km intervals. Other drivers suggested that spacing of Rest Areas based on 2-hour driving time intervals is appropriate. No clear pattern emerged with regards to where in the Province new or upgraded Rest Areas are needed.

A number of survey respondents specifically mentioned that commercial trucks sometimes have no place to stop because rest areas are full of recreational vehicles.





8.4 Final Comments

Two-hundred and seventy-four individuals responded to the last survey question. This question was the only survey question that was open to any respondent regardless of whether they were a commercial truck driver or not.

The vast majority of responses in this section reiterated topics discussed earlier in the report. This included clean washrooms, security, lighting, parking, location, and availability of flush toilets. Still, from the remaining comments, three noteworthy themes emerged:

Rest area signage:

- Placed well ahead of the Rest Area
- Distance to the next Rest Area shown
- Indicate if the site can accommodate trucks
- Display the name of the Rest Area

Urban centers:

- Rest Areas/truck parking are needed near urban centers

Winter service levels:

- Seasonal sites should not be those that can accommodate trucks
- Ensure washrooms are not blocked by snowbanks
- Buildings should be heated
- Toilet seats not made of metal
- Sites placed ahead of road sections that are often closed due to adverse weather

APPENDICES

SURVEY: REST AREA TRUCK SURVEY

Rest Area Survey – Commercial Truck Drivers

The British Columbia Ministry of Transportation and Infrastructure is seeking feedback from truck drivers regarding Rest Areas along the provincial highway network. This feedback is being undertaken as part of the Ministry's 10-year transportation plan titled 'B.C. on the Move'. This survey will take about 12 minutes to complete. Your participation is entirely voluntary. Your responses will be strictly confidential, and results from this research will only be reported as part of the total. Thank you for choosing to participate.

1. Are you a commercial truck driver?

- ☐ Yes
- ☐ No

DEMOGRAPHICS

2. What type of commercial driver are you?

- ☐ Long-haul (sleep away from home for work)
- ☐ Short-haul (sleep at home)
- ☐ Local delivery
- ☐ Other _____

3. Which of the following drive categories best describes you?

- ☐ Company driver
- ☐ Owner-operator/independent

4. How long have you been a commercial driver?

- ☐ Less than one year
- ☐ One to five years
- ☐ Six to ten years
- ☐ Over ten years

5. Does your cab have a sleeper berth?

- ☐ Yes
- ☐ No

6. What is your sex?

- ☐ Male
- ☐ Female

7. What is your age?

- ☐ 24 or younger
- ☐ 25 to 39
- ☐ 40 to 54
- ☐ 55 or older

SURVEY: REST AREA TRUCK SURVEY

YOUR LAST TRIP IN BRITISH COLUMBIA

8. What was the city of origin of your last trip in British Columbia?

9. What was the destination city of your last trip in British Columbia?

10. Please identify the main B.C. highway(s) that you used on your last trip (Select all that apply)?

- ☐ Highway 1
- ☐ Highway 3
- ☐ Highway 5
- ☐ Highway 16
- ☐ Highway 19
- ☐ Highway 95
- ☐ Highway 97
- ☐ Other _____

11. During your last trip in British Columbia, did you stop anywhere other than your origin or destination?

- ☐ Yes
- ☐ No

12. Is deciding where you will stop on your last trip in British Columbia, did you have:

- ☐ Complete freedom
- ☐ Some freedom (must choose from a company approved list)
- ☐ Little freedom (company chooses most stops)
- ☐ Other _____

13. If you slept overnight on your last trip in British Columbia, when did you make the decision? (Select all that apply)

- ☐ As I was driving
- ☐ Before I started driving
- ☐ I didn't stop to sleep away from home
- ☐ Other _____

14. During your last trip, what was the geographic location of your first stop?

15. During your last trip, what type of facility did you use on your first stop?

- ☐ Brake Check Pull-Out / Chain-Up Pull-Out / Weigh Scales
- ☐ Commercial truck stop
- ☐ Highway Rest Area
- ☐ Other _____

SURVEY: REST AREA TRUCK SURVEY

16. What was the primary purpose of your first stop? (select all that apply)

- ☐ Bad weather
- ☐ Brake check Pull-Out / Chain-Up Pull-Out / Weigh Scales
- ☐ Cargo securement check
- ☐ Food
- ☐ Fuel
- ☐ Restroom
- ☐ Sleep overnight
- ☐ To take minimum required off-duty time (out of hours of service)
- ☐ Other _____

17. How much time did you spend at this first stop?

- ☐ less than 1 hour
- ☐ 1 to 4 hours
- ☐ 4 to 8 hours
- ☐ 8 hours or more

18. During your last trip in British Columbia did you make a second stop between your origin and destination?

- ☐ Yes
- ☐ No

19. What was the geographic location of your second stop?

20. During your last trip, what type of facility did you use on your second stop? (select all that apply)

- ☐ Brake Check Pull-Out / Chain-Up Pull-Out / Weigh Scales
- ☐ Commercial truck stop
- ☐ Highway Rest Area
- ☐ Other _____

21. What was the primary purpose of your second stop?

- ☐ Bad weather
- ☐ Brake check Pull-Out / Chain-UP Pull-Out / Weigh Scales
- ☐ Cargo securement check
- ☐ Food
- ☐ Fuel
- ☐ Restroom
- ☐ Sleep overnight
- ☐ To take minimum required off-duty time (out of hours of service)
- ☐ Other _____

SURVEY: REST AREA TRUCK SURVEY

22. How much time did you spend at this second stop?

- ☐ less than 1 hour
- ☐ 1 to 4 hours
- ☐ 4 to 8 hours
- ☐ 8 hours or more

REST AREAS

23. Considering your last trip in British Columbia, to what extent do you agree or disagree with the following statements about Rest Areas?

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
There are enough Rest Areas along my route	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rest Areas were located in suitable locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

24. Please rank the importance of the following potential improvements to Rest Areas in British Columbia. Number one (1) being the most important and six (6) being the least important. (Click and drag to sort)?

- ☐ Create more truck parking
- ☐ Improve access for those with limited mobility
- ☐ Improve lighting
- ☐ Improve truck parking layout
- ☐ Provide free Wi-Fi access
- ☐ Upgrade restrooms to flush toilets

25. Is there a location where you would like to see Rest Area improvements?

- ☐ Yes
- ☐ No

26. Is there a location where you think a new Rest Area is needed?

- ☐ Yes
- ☐ No

SURVEY: REST AREA TRUCK SURVEY

27. Provide an example of a good Rest Area. What makes it good?

28. Would you support additional paid services, such as fast food restaurant, convenience store, and fuel station being available at some Rest Areas, in addition to free parking, restrooms and picnic spaces?

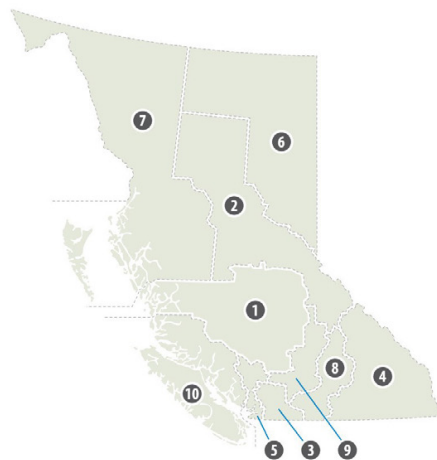
- ☐ Yes
☐ No

29. Please rank in importance the paid services that you would like to have available at Rest Areas. Number one (1) being the most important and seven (7) being the least important (Click and drag to sort)

- ☐ Convenience Store/Groceries
☐ Showers
☐ Fast food restaurant
☐ Fuel Station
☐ Electrification/Plug in
☐ Exercise facility
☐ Hotel/motel

30. Indicate the region(s) of the province where you would like to see paid services offered at Rest Areas. (Select all that apply).

- ☐ Central Interior (Cariboo)
☐ Central North
☐ Fraser Valley
☐ Kootenays
☐ Lower Mainland
☐ Northeast
☐ Okanagan
☐ Thompson Nicola
☐ Vancouver Island – South Coast



1. Central Interior (Cariboo)
2. Central North
3. Fraser Valley
4. Kootenays
5. Lower Mainland
6. Northeast
7. Northwest
8. Okanagan
9. Thompson Nicola
10. Vancouver Island – South Coast

31. Is there anything else you want to share in regards to Rest Areas in British Columbia?

- ☐ Yes
☐ No