

# RIS2 ROUTE STRATEGIES

SRN User Research



## CONTENTS

- Background and objectives
- Key findings
- SRN performance – Motorways
- SRN performance – A roads
- Using motorways
- Journey planning
- Looking to the future

images subject to copyright and supplied by thinkstock



# Background and objectives

# Background and objectives

As part of the **Road Investment Strategy for post 2020 (RIS2) development**, Highways England is working together with Transport Focus to better understand **experiences** and **key challenges** faced by **Strategic Road Network users**

The overarching objective is to **develop an understanding of road users' problems when using SRN routes and identify further detail around areas for improvement**. The research findings will feed into the strategy development for post 2020

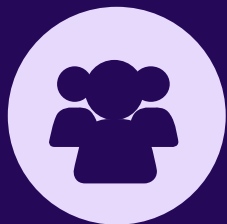
- Provide a comprehensive understanding of the challenges that road users face when using the SRN focusing on areas highlighted as priorities for improvement
- Explore user perceptions on how the problems they face when using the SRN can be addressed
- Explore road users expectations for the future, including how they see the evolution of the user experience post 2020

# Method

A programme of research with SRN users and fleet managers

## SRN Drivers

Face to face  
Survey:



Fieldwork  
dates:



Car/van



HGV



Motorcyclists



Coach

**4,422**

interviews with drivers  
across 18 routes

19 May – 3 July 2016

## Managers

Telephone  
Survey:



Fieldwork  
dates:



**250**

interviews with fleet  
managers from a cross  
section of industries

Manager sample obtained  
from the Experian database

2 June – 28 June 2016

# Key

Symbol

Denotes

## Technical note:

- Data are weighted on route traffic flow
- All bases shown in report are based on unweighted figures



Motorways



Major A roads



Local roads



Statistical difference between sub sample










Significantly higher than the group(s) with the red arrow





















Significantly lower than the group(s) with the green arrow

# Driver Sample breakdown

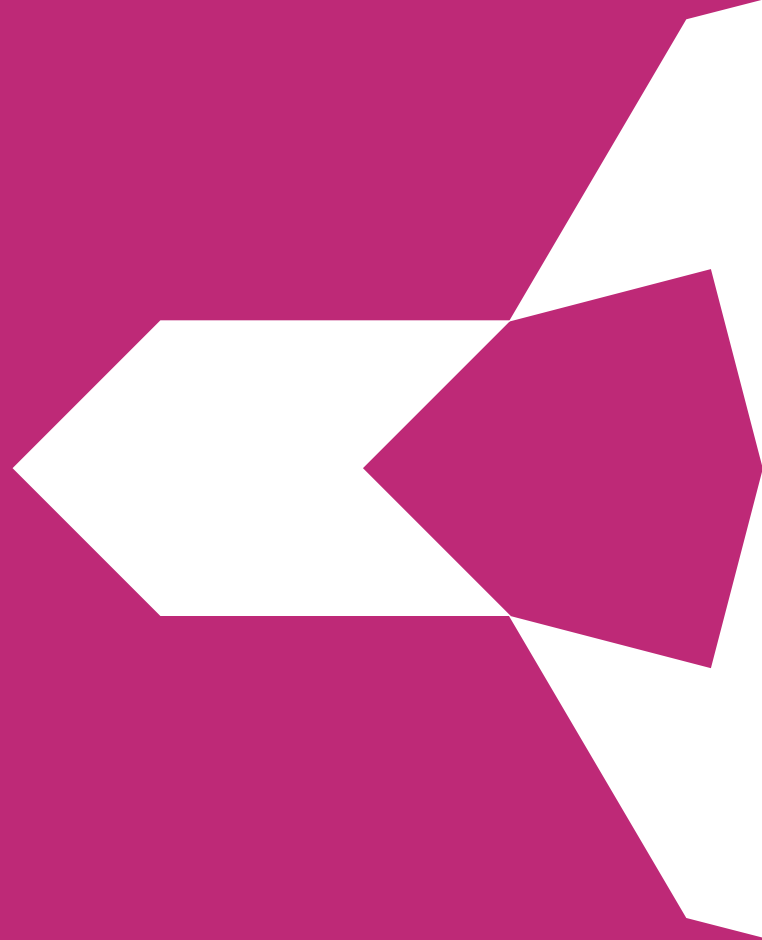
	Completed interviews (unweighted)	%	Completed interviews (weighted)	%
	3,487	79%	3,411	77%
	322	7%	303	7%
	407	9%	453	10%
	206	5%	255	6%
Commuting 	501	11%	537	12%
Business 	1,367	31%	1,496	34%
Leisure 	2,457	56%	2,315	52%



**250 fleet managers from a mix of industries, size and regions**

ROUTE	Completed interviews (unweighted)	Completed interviews %	Completed interviews (weighted)	Completed interviews %
 London to Scotland East	310	7%	592	13%
 London Orbital and M23 to Gatwick	191	4%	459	10%
 London to Scotland West	293	7%	592	13%
 London to Wales	208	5%	208	5%
 Felixstowe to Midlands	306	7%	203	5%
 Solent to Midlands	238	5%	168	4%
 M25 to Solent	174	4%	150	3%
 Kent Corridor to M25	192	4%	150	3%
 South Coast Central	152	3%	97	2%
 Birmingham to Exeter	262	6%	216	5%
 South West Peninsula	327	7%	194	4%
 London to Leeds (East)	288	7%	230	5%
 East of England	274	6%	172	4%
 South Pennines	353	8%	579	13%
 North Pennines	204	5%	57	1%
 Midlands to Wales and Gloucestershire	235	5%	93	2%
 North and East Midlands	144	3%	133	3%
 South Midlands	271	6%	128	3%

Key findings





# Key findings

Overall the Strategic Road Network performs well – drivers report a good journey experience on the day  
Perceived SRN performance scores are moderate among business fleet managers

The most salient reason for satisfaction is good traffic flow/lack of congestion

- Poor traffic flow and congestion are the biggest drivers of dissatisfaction

Few drivers experience problems in the moment

- However, there is a cumulative effect, with significantly more drivers encountering a problem on the SRN in the last year (than in the moment)
- Congestion is the single biggest problem experienced by drivers

Businesses highlight some concerns; with busy roads and congestion, seen as the biggest challenges when their fleets are on the SRN

M25 to Solent and London Orbital/M23 to Gatwick have the highest incidence of problems

Increasing road flow/capacity is mentioned by drivers and businesses as an improvement for the future



SRN performance – Motorways



# Overall in the moment motorway journey experience is very positive

There are few differences in experience by user type

● Mean score

How would you rate your overall journey?



Car/van

● 7.6



Motorcyclists

● 7.7



HGV

● 7.5



Coach

● 7.7



Leisure

● 7.7 ↑



Commuter

● 7.7



Business

● 7.5 ↓

Q9. On a scale of 0 to 10, where 0 is an extremely poor journey and 10 is an extremely good journey, how would you rate your overall journey on the Motorway? Base: All using motorways (2,129)

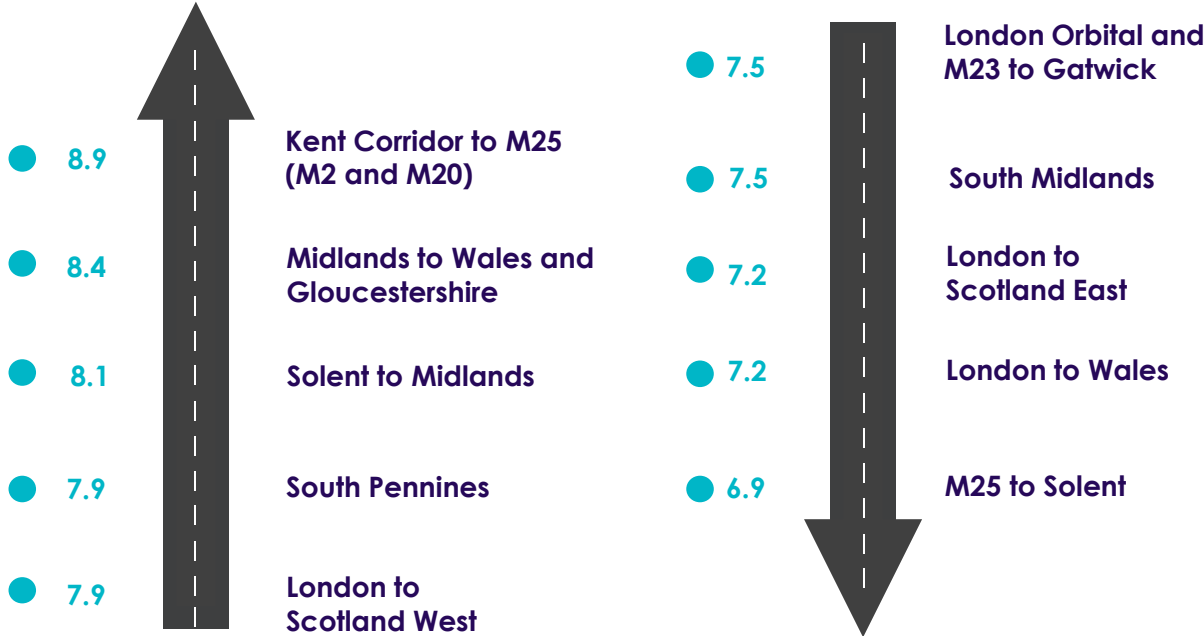


# However, there are some routes that are rated more positively than others

● Mean score

Highest rated

Lowest rated



Previous use of the Route colours perceptions

Frequent users = 7.4 ↓

Infrequent users = 7.7 ↑

Q9. On a scale of 0 to 10, where 0 is an extremely poor journey and 10 is an extremely good journey, how would you rate your overall journey on the Motorway? Base: All using motorways (2,129)

# Good traffic flow has the biggest impact on satisfaction



Other factors such as good quality roads do not have as big an impact on in the moment journey satisfaction

80%

Traffic flowing/lack of congestion

This said, we know that **\*improved quality of road surfaces** is the highest priority for improvement for SRN users

4%

Good quality roads

3%

Preferred/scenic route

3%

Slight delay/not too many hold-ups

\* Source: Road users' priorities for improvement

Q10. Why do you rate your journey today as a ...? Base: All SRN users giving a rating of 8, 9 or 10 (1,331)

# Some comments from those who had a positive experience



SRN users generally accept that there may be minor hold ups on the network. These minor occurrences do not typically seem to have an impact on journey experience

“ Not too much traffic and no roadworks on that bit of M1  
-----  
**London Orbital/M23 to Gatwick** ”

“ Traffic flowing well not too busy  
-----  
**London to Scotland East** ”

“ Lovely motorway, always stress free  
-----  
**South Midlands** ”

“ Slightly heavy traffic but it was rush hour  
-----  
**London Orbital and M23 to Gatwick** ”

“ No major holdups or problems  
-----  
**London to Scotland West** ”

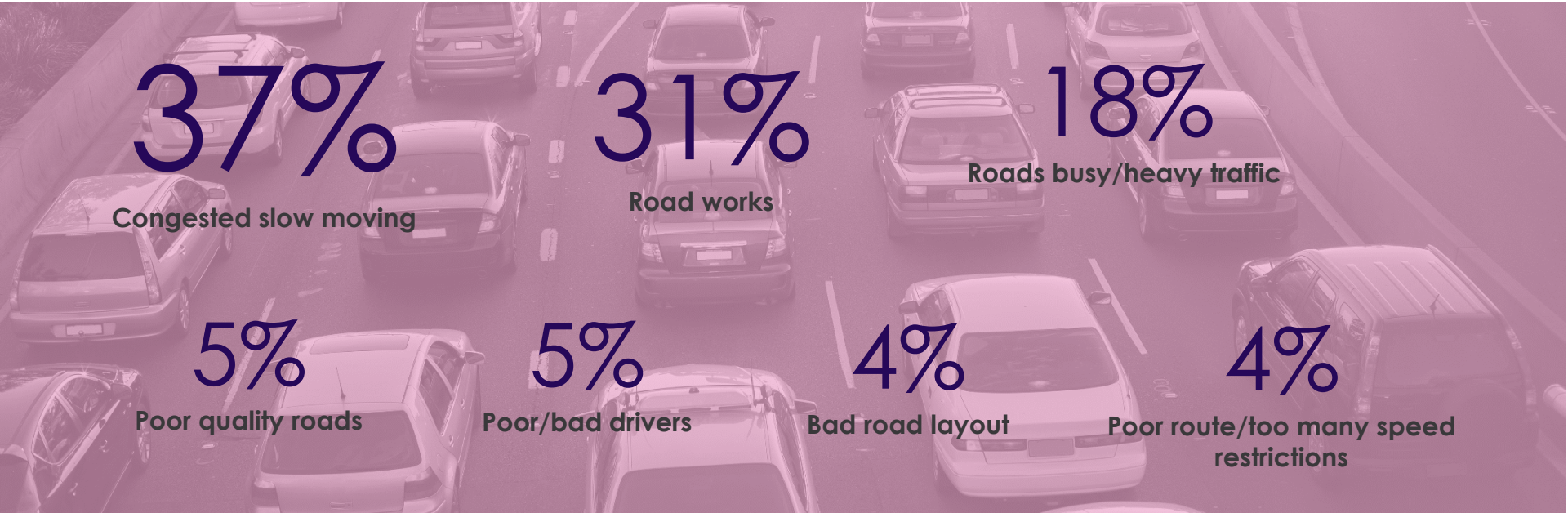
“ I don't have a problem with this road its spacious and there are four lanes mainly  
-----  
**London to Leeds (East)** ”

“ Good weather, no accidents on roads  
-----  
**London to Scotland West** ”

“ The roads I travelled on today were fine obviously there was the traffic which I understand  
-----  
**London to Leeds (East)** ”

Q10. Why do you rate your journey today as a ...? Base: All SRN users giving a rating of 8, 9 or 10 (1,331)

# Drivers experiencing hold ups to their journey are more likely to give lower ratings



Q10. Why do you rate your journey today as a ...? Base: All SRN users giving a rating of 0,1,2,3,4,5 (317)



# Some comments from those who had a negative experience

“ More like a dual carriageway instead of a motorway. Big HGVs disrupt the flow of traffic  
— — — — —  
London to Scotland West ”

“ It's flooded and people are driving like nutters  
— — — — —  
South Pennines ”

“ Lots of congestion and roadworks  
— — — — —  
London to Scotland East ”

“ Too much traffic because of the road works  
— — — — —  
South Midlands ”

“ Road works, speed restrictions and long delays in the evenings  
— — — — —  
London to Wales ”

“ It's always congested. The M6 is the worst, heavy traffic and speed limits slowing down traffic  
— — — — —  
London to Scotland West ”

“ The potholes on the roads make bike riding dangerous  
— — — — —  
Kent Corridor to M25 ”

“ Roadworks have been going on for too long, over two years, both ways, fed up with it. They are making it into smart motorways which will not make a difference  
— — — — —  
M25 to Solent ”

Q10. Why do you rate your journey today as a ...? Base: All SRN users giving a rating of 0,1,2,3,4,5 (317)



# Fleet managers are largely neutral in their opinion of motorways

Poor perceptions are largely linked to roadworks and congestion

● Mean score

How would you rate motorways overall?



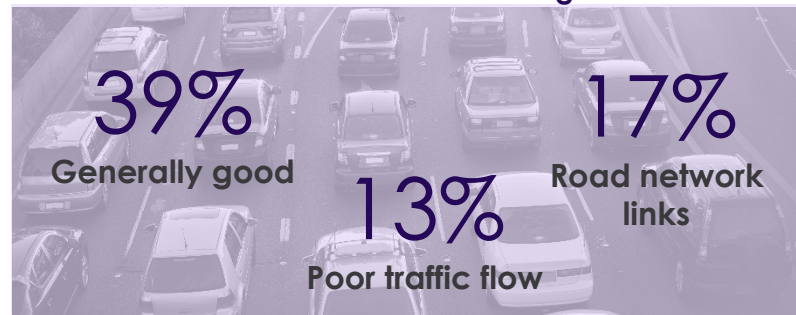
0 - Extremely poor

10 - Extremely good

Rationale for 0 – 5 rating



Rationale for 8 – 10 rating



Q4. Thinking about the needs of your business, overall on a scale of 0 to 10, where 0 is extremely poor and 10 is extremely good, how would you rate the MOTORWAYS in England? Base: All fleet managers (250)

Q5. Why do you rate MOTORWAYS as a? Base: All fleet managers giving a rating of 0,1,2,3,4,5 (60); All giving a rating of 8, 9 or 10 (46)

# Some comments from fleet managers



Business  
perspective

## Rationale for 0 – 5 rating

“  
The infrastructure in terms of connectivity is good, the condition of the roads is poor currently and the volume of traffic on the roads is poor as there is too much of it  
”

“  
Because they're clogged up a lot of the time, especially around Birmingham and Gloucester  
”

“  
Because of the congestion, especially, on M25, M6, M11  
”

“  
Capacity issues. It takes far too long to deal with accidents because there are too many people on the road.  
”

## Rationale for 8-10 rating

“  
Apart from traffic, motorways are good  
”

“  
Generally speaking its the quickest way of travelling, providing no accidents  
”

“  
The motorway is OK but very congested. Some road surfaces leave much to be desired and need attention  
”

“  
They are usually fairly good but you do still get holds ups every now and then  
”

Q5. Why do you rate MOTORWAYS as a? Base: All fleet managers giving a rating of 0,1,2,3,4,5 (60); or 8, 9 or 10 (46)



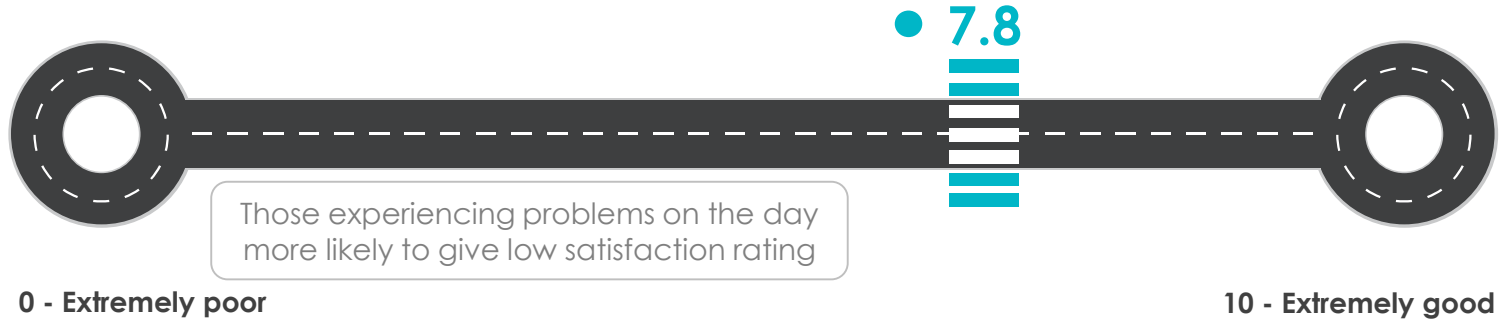
SRN performance – A roads

# Overall in the moment journey experience on A roads is also very positive

Again car/van drivers report a better journey experience than HGV drivers

● Mean score

How would you rate your overall journey?



Q11. On a scale of 0 to 10, where 0 is an extremely poor journey and 10 is an extremely good journey, how would you rate your overall journey on Major A roads? Base: All using SRN users using A roads (2,660)

# Some routes still perform better than others for journey experience



● Mean score

Highest rated

Lowest rated

● 9.2

North Pennines

● 7.6

South West Peninsula

● 8.7

M25 to Solent

● 7.4

London to Leeds (East)

● 8.4

London to Scotland East

● 7.1

South Pennines

● 8.1

North and East Midlands

● 7.0

East of England

● 8.0

South Midlands

Experience of problems has impact on overall experience:

Problems on route = 6.6 ↓

No problems on route = 7.9 ↑

While M25 Solent A roads are rated highly, motorways on the route receive the lowest rating

Q11. How would you rate your overall journey on the road? (A Roads) Base: All SRN users using A roads (2,660)

# Traffic flow remains the most influential factor in journey satisfaction



Other issues have a much smaller impact on overall in the moment journey experience

81%

Traffic flowing/lack of congestion

5%

Good quality roads

3%

Average/slight delays

3%

Good/preferred route/scenic

Q12. Why do you rate your journey today as a ...? Base: All SRN users giving a rating of 8, 9 or 10 (1,726)

# Some comments from those who had a positive experience

A

Some SRN users' comments demonstrate that there would be a difference between satisfaction in the moment and over time

*Good journey, traffic fairly light*

**Kent Corridor to M25 (M2 and M20)**

*Good road in the day time but after 5pm congestion is ridiculous*

**South Midlands**

*A very good road as it's fast and mostly a dual carriageway*

**South West Peninsula**

*It's the best road I've been on so far – no pot holes and it's flowing freely*

**London to Leeds (East)**

*A few road works but traffic flowed smoothly*

**South West Peninsula**

*The traffic is flowing. There's no road works, no accidents*

**Solent to Midlands**

*Easy, clear route. Very little traffic. The services need a 24-hour sign*

**East of England**

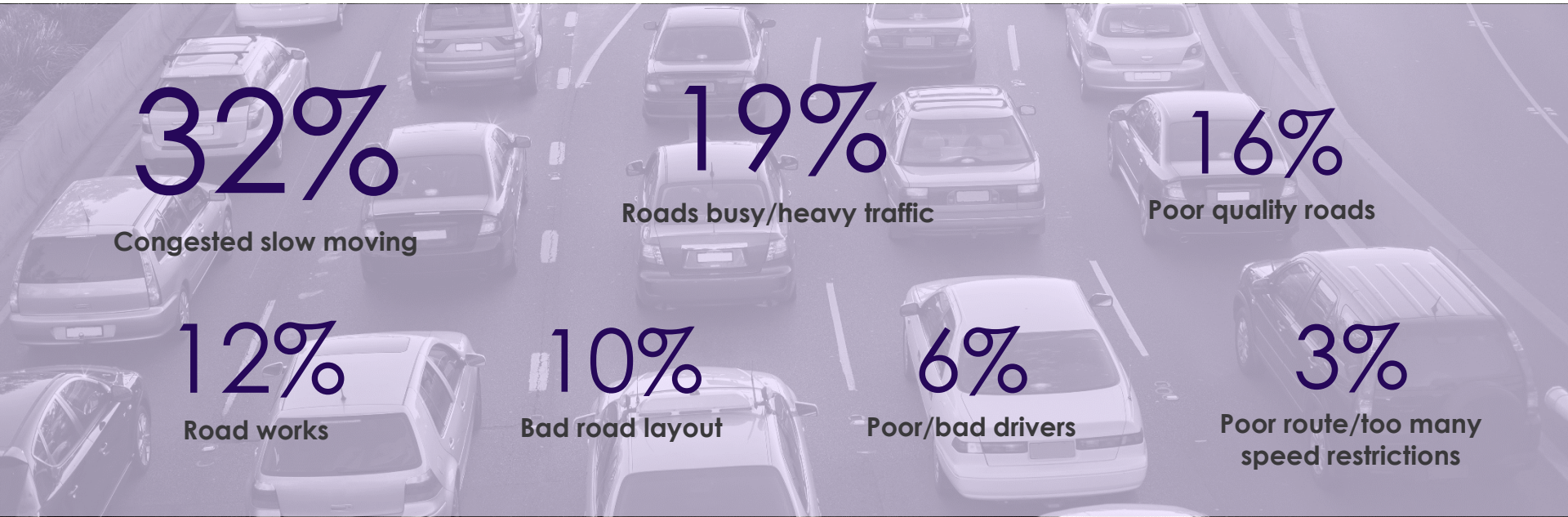
*Didn't come across any traffic or traffic lights*

**South West Peninsula**

Q12. Why do you rate your journey today as a ...? Base: All SRN users giving a rating of 8, 9 or 10 (1,726)

# As seen with motorways, congestion is also the main cause of dissatisfaction on A roads

Road works are however less of an issue on A roads; however road quality is more of a problem



Q12. Why do you rate your journey today as a ...? Base: All SRN users giving a rating of 0,1,2,3,4,5 (333)



# Some comments from those who had a negative experience

“ It's always too busy and it's only 2 lanes  
— — — — —  
**South Pennines** ”

“ The junction is rubbish –  
you have to go over 4 lanes to get out  
— — — — —  
**South Midlands** ”

“ Lost 25 minutes in stop start traffic  
— — — — —  
**Solent to Midlands** ”

“ A lot of traffic and a big traffic jam  
— — — — —  
**South Pennines** ”

“ Congestion. The traffic is at a crawl driving northbound towards  
Guildford on A3. Congestion usually starts just before Milford junction  
and adds at least 30 minutes to my journey to work every weekday  
— — — — —  
**M25 to Solent** ”

“ Too many roadworks going on at once and  
speed restrictions when there is no one working  
— — — — —  
**London to Scotland East** ”

“ The traffic is really bad – that's why I use a bike  
— — — — —  
**East of England** ”

“ Road surface needs repairing and road  
needs to be wider  
— — — — —  
**East of England** ”

Q12. Why do you rate your journey today as a ...? Base: All SRN users giving a rating of 0,1,2,3,4,5 (333)

# Fleet managers' overall perceptions of A roads are closely aligned to views on motorways

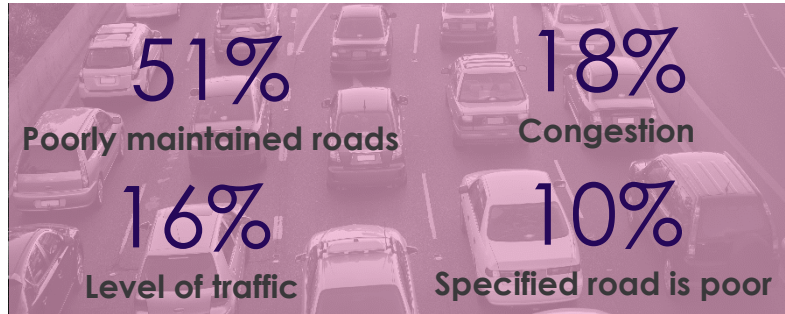
Poor maintenance stands out as being a particular problem on A roads

● Mean score

How would you rate A roads overall?



Rationale for 0 – 5 rating



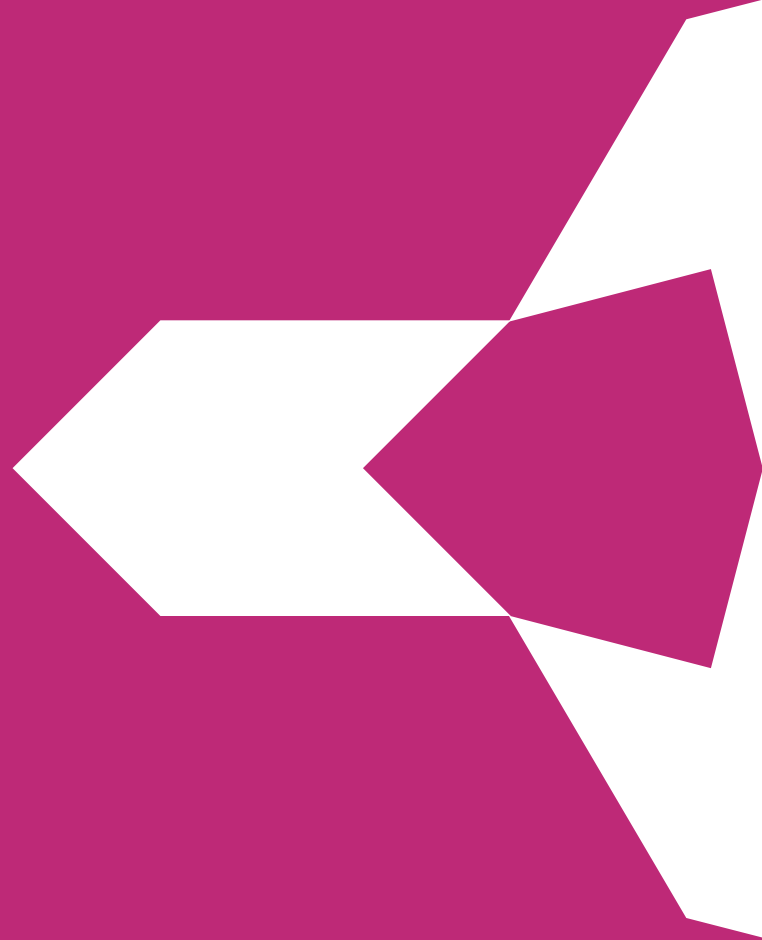
Rationale for 8,9,10 rating



Q6. Thinking about the needs of your business, overall on a scale of 0 to 10, where 0 is extremely poor and 10 is extremely good, how would you rate the TRUNK ROADS in England? Base: All fleet managers (250)

Q7. Why do you rate TRUNK ROADS as α? Base: All fleet managers giving a rating of 0,1,2,3,4,5 (61); or 8, 9,10 (66)

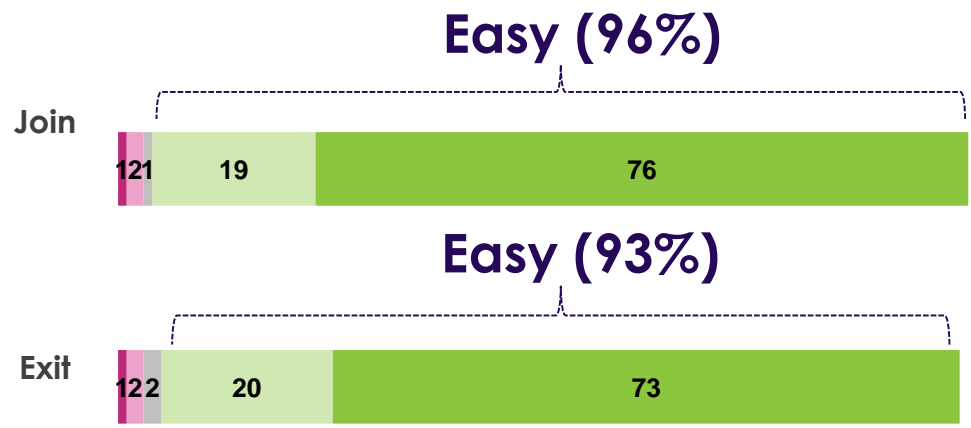
Using motorways





# SRN users find it is easy to join and exit the network

Very difficult   Fairly difficult   Neither   Fairly easy   Very easy



	Joining		Exiting	
	Easy	Difficult	Easy	Difficult
	95% ↓	3%	92% ↓	2%
	96%	3%	97% ↑	1%
	97%	2%	97% ↑	1%
	97% ↑	2%	94%	3%

Q13a. And how easy or difficult would you say it was to join any Motorways or Major A roads on your journey today? Base: All SRN users (4,422)  
Q13b. And how easy or difficult was it to exit Motorways or Major A roads on your journey today? Base: All SRN users (4,422)





# The roads identified as the most problematic to join are also ranked low on overall journey experience

Volume of traffic and congestion cause the greatest difficulties when joining the SRN

	% Difficulty joining	Route impacted
<b>M25</b>	12%	London Orbital and M23 to Gatwick
<b>M4</b>	11%	London Orbital and M23 to Gatwick
<b>M1</b>	5%	London to Scotland East
<b>A13</b>	5%	London Orbital and M23 to Gatwick
<b>A66</b>	4%	London to Scotland East



**41%**

Roads busy/high volume of traffic



**22%**

Congested/traffic queuing



**11%**

Delays caused by accidents/roads closed



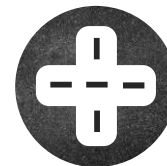
**11%**

Poor drivers (disregard, not allowing traffic to filter)



**5%**

Inaccurate signage



**9%**

Traffic merging at junction



**7%**

Poor road layout

Q14a. Which Motorway/A Road was difficult to join? Base: All SRN users saying it was neither easy or difficult or it was difficult to join the SRN (169)

Q14c. Why was it difficult to join? Base: All SRN users saying it was neither easy or difficult or it was difficult to join the SRN (169)





# The London Orbital/M23 to Gatwick route stands out as the most problematic for SRN users when exiting

While busy roads cause difficulty for SRN users exiting the network, unlike for joining, fewer people highlight this as an issue

	% Difficulty exiting	Route impacted
<b>M25</b>	17%	London Orbital and M23 to Gatwick
<b>A1(M)</b>	8%	London to Scotland East
<b>M40</b>	7%	London to Scotland West
<b>M5</b>	5%	Birmingham to Exeter
<b>M6</b>	5%	London to Scotland West
<b>M1</b>	4%	London to Scotland East



**27%**

Roads busy/high volume of traffic



**26%**

Congested/traffic queuing



**14%**

Poor road layout



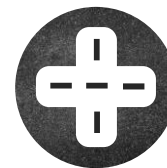
**10%**

Delays caused by accidents/roads closed



**10%**

Inaccurate signage



**10%**

Traffic merging at junction



**2%**

Poor drivers (disregard, not allowing traffic to filter)

Q14d. Which Motorway/A Road was difficult to exit? Base: All SRN users saying it was neither easy or difficult or it was difficult to join the SRN (144)

Q14f. Why was it difficult to exit? Base: All SRN users saying it was neither easy or difficult or it was difficult to join the SRN (144)



# Nine in ten journeys were perceived as problem free on the day

89%

11%

Did not experience any problems   Experienced a problem

Motorway users who plan their journey are more likely to report problems than those who are more familiar with the route (9% vs. 7%)

Motorway users on longer journeys (10 miles +) are more likely to have experienced problems

Experienced a problem



Car/van

10% ↓



Motorcyclists

12%



HGV

12%



Coach

17% ↑

Experienced a problem



Leisure

10% ↓



Commuter

8% ↓



Business

13% ↑

Q15a. And have you experienced any other problems on the roads you used today? Base: All SRN users (4,422)

# Routes connected to London have the highest proportion of reported problems



Medium exposure		Low exposure	
Experienced problems %	Route impacted	Experienced problems %	Route impacted
14%	Birmingham to Exeter	4%	Felixstowe to Midlands
11%	London to Scotland East	4%	Solent to Midlands
11%	London to Scotland West	3%	South Midlands
11%	M25 to Solent	2%	Kent Corridor to M25 (M2 and M20)
11%	South Pennines	2%	London to Leeds (East)
9%	London Orbital and M23 to Gatwick	1%	Midlands to Wales and Gloucestershire
8%	London to Wales		

Q15a. And have you experienced any other problems on the roads you used today? Base: All SRN users 4,422



# South Coast Central stands out as the most problematic route for A roads

## High exposure

Experienced problems %	Route impacted
28%	South Coast Central

## Medium exposure

Experienced problems %	Route impacted
11%	South West Peninsula
9%	Solent to Midlands
8%	North and East Midlands
7%	Felixstowe to Midlands
6%	London to Leeds (East)
6%	East of England

## Low exposure

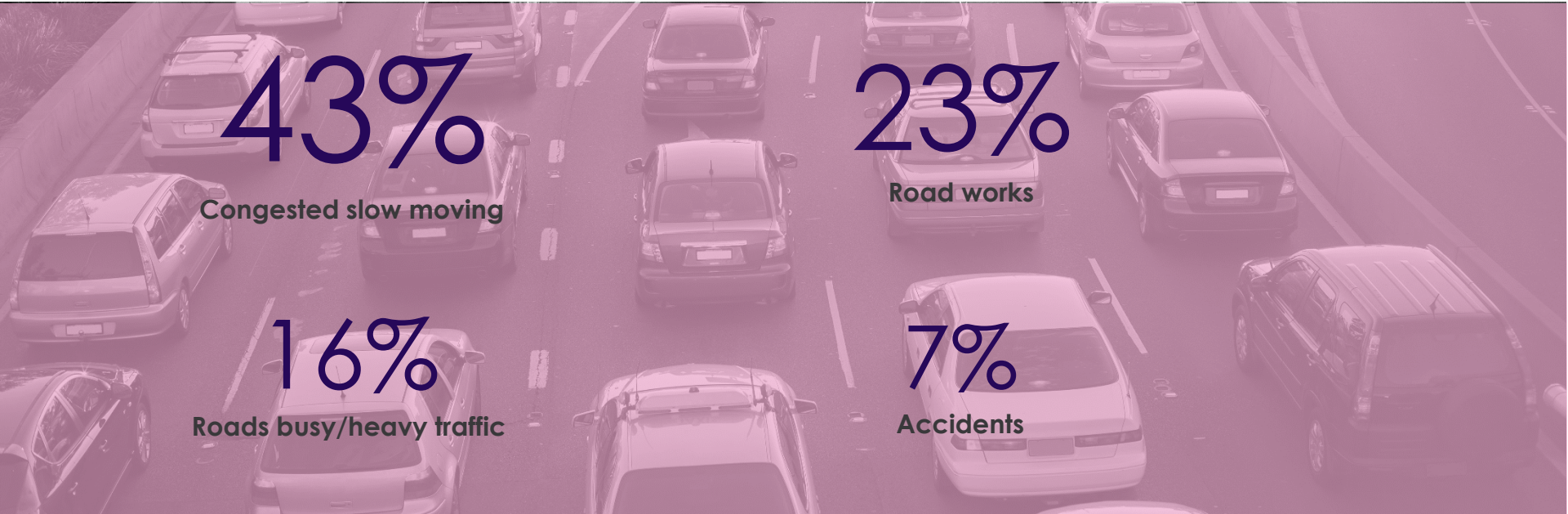
Experienced problems %	Route impacted
5%	Midlands to Wales and Gloucestershire
5%	South Midlands
2%	London to Scotland East
2%	Kent Corridor to M25 (M2 and M20)
2%	North Pennines

## No exposure

Experienced problems %	Route impacted
1%	London Orbital and M23 to Gatwick
1%	M25 to Solent
1%	South Pennines
0%	London to Wales

Q15a. And have you experienced any other problems on the roads you used today? Base: All SRN users 4,422

# Congestion is the biggest problem SRN users experienced on the day



Q15b. Problems experienced on the roads you used today - All SRN users experiencing problems on the day (441)

# However, over the course of a year, more SRN users experience problems

60%

Did not experience any problems

40%

Experienced a problem

Generally, SRN users who have experienced problems in the last year are significantly more likely to give a lower rating for their on the day experience of motorways and A roads

Experienced a problem



(Car/van)

38% ↓



(Motorcyclists)

35% ↓



(HGV)

51% ↑



(Coach)

58% ↑

Experienced a problem



(Leisure)

33% ↓



(Commuter)

43% ↓







(Business)

50% ↑

Q16a. And have you previously experienced problems on this route in the last year? Base: All SRN users who did not experience any problems on the day (3,981)

# Two of the three routes with the highest proportion of in the moment problems have also been the most problematic over the course of the year

Very high  
exposure to  
problems





Experienced problems %	Route impacted (Base shown in brackets)	 Congested/ traffic queuing	 Roadworks	 Delays caused by accidents/roads closed	 Roads busy/high volume of traffic
61%	M25 to Solent (153)	61%	25%	24%	17%
58%	London Orbital and M23 to Gatwick (173)	48%	19%	31%	34%
50%	South Coast Central (109)	33%	19%	13%	31%

Q16a. And have you previously experienced problems on this route in the last year? Base: All SRN users who did not experience any problems on the day (3,981)

Q16b. What problems did you experience? All SRN users who experienced problems in the last year (1,517)

# The North and East Midlands and South Pennines routes have a high level of congestion

High exposure to problems





Experienced problems %	Route impacted (Base shown in brackets)	 Congested/ traffic queuing	 Roadworks	 Delays caused by accidents/roads closed	 Roads busy/high volume of traffic
46%	Solent to Midlands (95)	49%	26%	20%	27%
44%	East of England (114)	50%	20%	32%	12%
43%	Birmingham to Exeter (97)	42%	36%	28%	22%
41%	South West Peninsula (121)	43%	27%	21%	19%
41%	North and East Midlands (54)	65%	9%	31%	22%
40%	London to Scotland East (108)	39%	56%	14%	16%
40%	South Pennines (123)	61%	38%	20%	13%
39%	Kent Corridor to M25 (M2 and M20) (73)	42%	11%	25%	21%

Q16a. And have you previously experienced problems on this route in the last year? Base: All who did not experience any problems on the day (3,981)

Q16b. What problems did you experience? All SRN users who experienced problems in the last year (1,517)

# Less problematic routes have varied levels of specific issues

Medium exposure to problems

Experienced problems %	Route impacted (Base shown in brackets)	 Congested/ traffic queuing	 Roadworks	 Delays caused by accidents/roads closed	 Roads busy/high volume of traffic
37%	London to Scotland West (96)	46%	46%	26%	16%
32%	Midlands to Wales and Gloucestershire (71)	31%	30%	6%	30%
30%	Felixstowe to Midlands (82)	43%	27%	13%	23%
30%	South Midlands (75)	52%	21%	8%	20%
28%	London to Leeds (East) (75)	41%	17%	47%	20%
27%	London to Wales (52)	60%	25%	19%	19%
17%	North Pennines (33)	18%	55%	24%	9%

Q16a. And have you previously experienced problems on this route in the last year? Base: All who did not experience any problems on the day (3,981)

Q16b. What problems did you experience? All SRN users who experienced problems in the last year (1,517)

# Most of the challenges reported to businesses are linked to drivers' ability to use the SRN with few hold-ups



Business perspective

Impact of problems and challenges

0 – No impact at all



10 – Very high impact

## Local roads

● Mean score



	Motorways	Trunk roads	Local roads
Roads busy	26%	26%	21%
Congestion/slow moving	17%	16%	13%
Delays	15%	10%	8%
Road works	13%	10%	6%
Other road users/lack of respect/poor driving	13%	11%	5%
Journey times	12%	6%	3%
Accidents	11%	6%	2%
Poor quality roads	1%	10%	22%

Q8a/b/c. What would you say are the biggest challenges for your drivers when driving on Motorways/Trunk roads/Local roads? All fleet managers (250)  
 Q9. Using a scale ranging from 0 to 10, where 0 is no impact at all and 10 is very high impact. To what extent would you say your business is impacted by the challenges and problems your fleet drivers experience on the Strategic Road Network? All fleet managers (250)



# Problems reported to fleet managers are largely on Motorways

The M25 particularly stands out as a problem for businesses

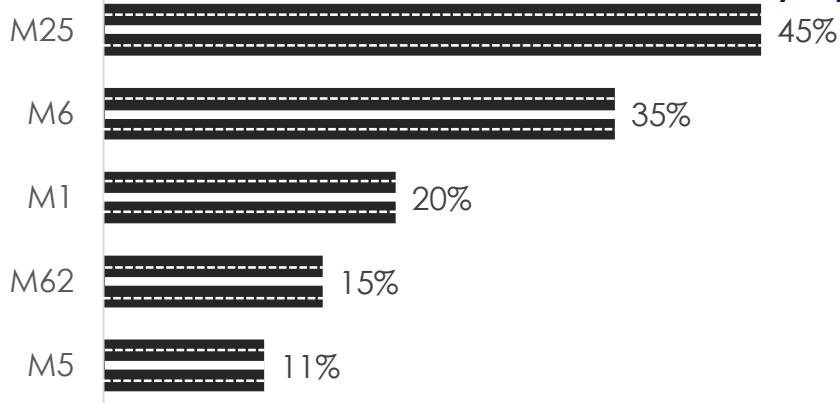
# 74%

52% of businesses who operate from only one region highlight the M25 as problematic

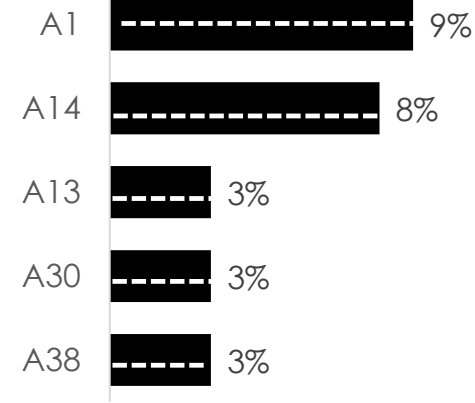


## Motorways

Highlight SRN problems consistently reported by drivers



## A-Roads











Q10. Are there any particular Motorways or Trunk roads that are consistently highlighted as problematic by drivers? Base: All fleet managers (250)  
Q11a. Which ones? Base: All fleet managers identifying problematic motorways or A roads (185)



# Most problems mentioned have an impact on the ability for drivers to get through the SRN efficiently



Business perspective

Problems encountered	%	Road
 Congestion	49%	M1 M25 M5 M6 M62
 Road busy	46%	M1 M25 M5 M6 M62
 Roadworks	37%	M1 M25 M5 M6 M62
 Accidents/time it takes to deal with accidents	16%	M6 M25
 Delays/speed restrictions	16%	M1 M25 M5 M62
 Poor road layout	10%	
 Traffic merging	7%	
 Poor quality roads	3%	

Q11b. What are the problems they complain about? Base: All fleet managers identifying problematic motorways or A roads (183)

# Some problems mentioned by businesses...



Business  
perspective

M1

"**Roadworks** and **congestion** leading to longer journey times."

"**Congestion** and **slow moving traffic** and incidents. Which I know is not anybody's fault but it happens."

M5

"**Road works** taking forever which mean drivers reducing speed, leading to **accidents** which cause **traffic** and **delays**."

"The amount of **traffic** and obviously **road works**."

M6

"**Volume of traffic** on a Friday afternoon, we struggle to get up to Birmingham from Manchester as the traffic is solid."

"Accidents causing **congestion**."

M25

"Usually feels like a car park due to **slow movement**. Other problems of flooding and **road works** too."

"**Volume of traffic** and the way it comes to a stand still for the slightest incident or **road works**. There's literally just nowhere for trucks to park."

M62

"Around junction 27 there are **crashes** on a daily basis."

"It's just sheer **volume of traffic** at peak times."

Q11b. What are the problems they complain about? Base: All fleet managers identifying problematic motorways or A roads (183)

# Greater capacity is the single biggest improvement to alleviate problems faced by fleet operators



Business  
perspective

32%

Wider roads/motorway lanes

8%

Get roadworks finished quicker

8%

Build more roads/bypasses

8%

Improve flow

7%

Invest more

7%

Roadworks done at a more convenient time

7%

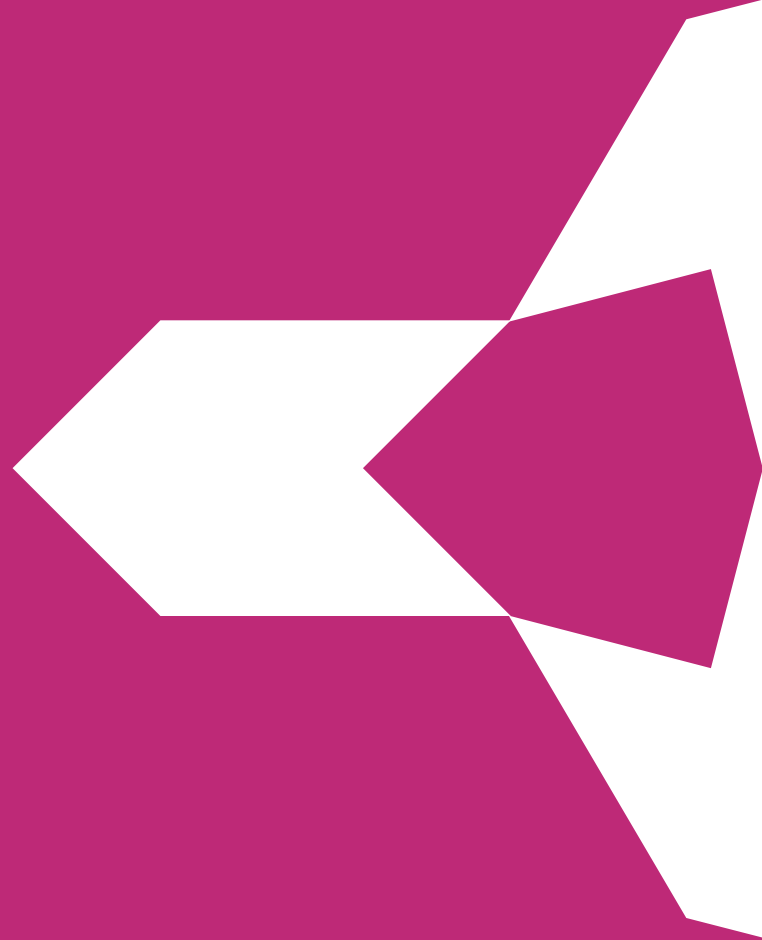
Too many vehicles

5%

Restrictions for lorries/special lanes/certain times

Q11c. And what do you think should be done about them? Base: All fleet managers identifying problematic motorways or A roads (183)

Journey planning



# Most drivers are familiar with their route before setting off

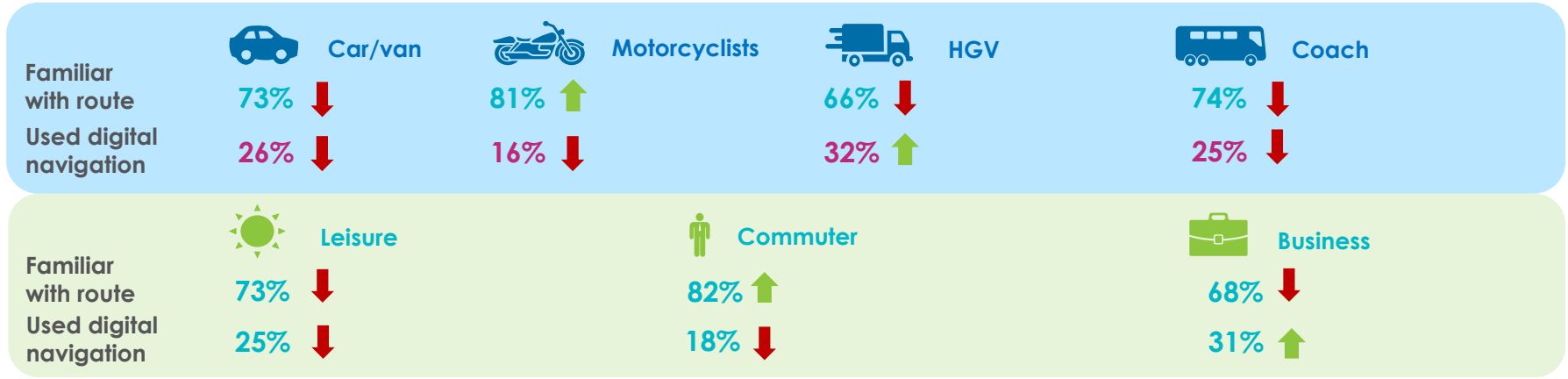
However, use of digital navigational tools is notable, particularly so among HGVs and business travellers

	Route finding
Driver/passenger familiar with route	73%
Planned journey using digital navigation (smartphone, Satnav, Internet)	26%
Paper based map/atlas	2%

Use of navigational tools by those likely to be familiar with the route may also include obtaining in the moment traffic information

Use of digital navigation is highest:

- on motorway journeys
- for infrequent route users
- for those who planned to avoid route due to roadworks/ congestion



Q5a. How did you plan your journey today? Base: All SRN users (4,422)

# Few plan a route change

It is very rare that drivers will reroute once they set out

Pre journey planning

# 9%

**SRN users consciously avoided roadworks/congestion or other issues**

Reasons for avoidance:



5%

Roadworks/closures/  
diversions



4%

Congested/  
Black spots familiar with

**Routes with users pre-planning to avoid issues:**

- London Orbital/M23 to Gatwick
- London to Wales
- Solent to Midlands
- South Coast Central

'In' journey planning

# 4%

**SRN users changed their route**

Reasons for route change:



3%

Roadworks/closures/  
diversions



1%

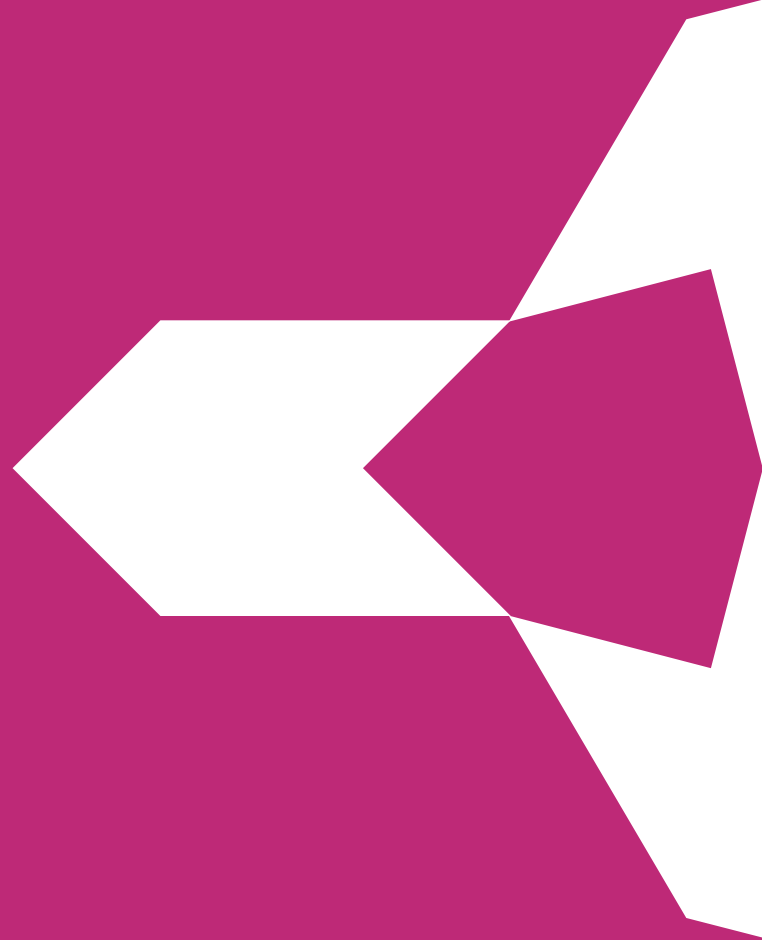
Congested/  
Black spots familiar with

London Orbital/M23 to Gatwick most likely to reroute

Q5b. In planning your journey today did you consciously plan to avoid any of the following? Base: All SRN Users (4,422)

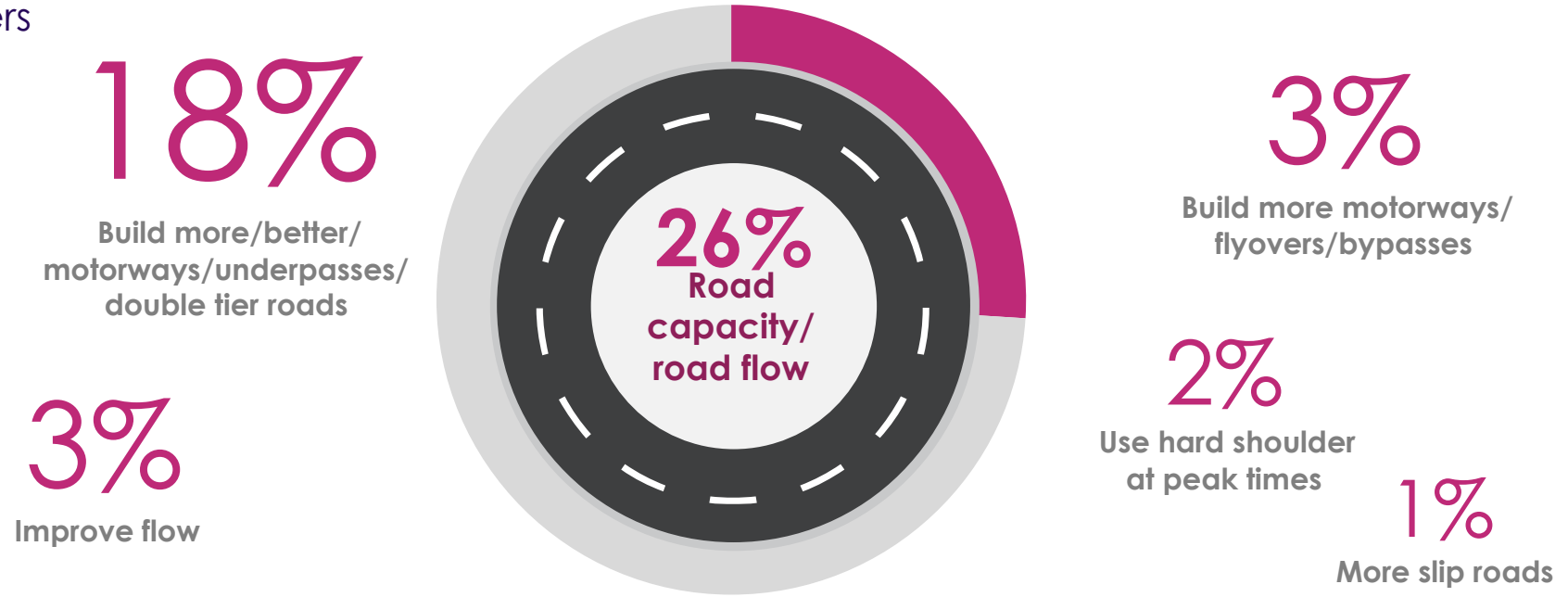
Q5c. Have you changed your route on the Motorways and A roads you have used at all since setting out today? Base: All SRN Users (4,422)

Looking to the future



# Long term suggestions to improve the SRN are varied

However, the increase of road capacity or road flow is the most salient improvement for drivers



Q17. Thinking about the longer term, so year 2020 and beyond, what do you think Highways England could do to improve the experience of travelling on the Strategic Road Network for you and your passengers in the future? All SRN users (4,422)



# Comments on increasing capacity

Future improvements  
NET: Road capacity/  
road flow

*Have four lanes on every motorway. Two for lorries and coaches and two for cars*

**South Midlands**

*It needs to be three lanes because the volume of traffic. Road works need to be timed according to lower levels of traffic*

**London to Leeds (East)**

*All of the roads need making bigger - much bigger. We need big roads like the States have. We have the room - build up rather than out*

**East of England**

*Wider roads because there is so much traffic*

**London to Scotland West**

*Make roads three lanes, and where there's two lanes ban HGVs in the outside lane like they do in Germany*

**London to Leeds (East)**

*Better, bigger, safer roads in a nutshell. What more could I say - it is what it is*

**Felixstowe to Midlands**

*Less congestion and better traffic management when there is an accident*

**Kent Corridor to M25**

*Bigger, bigger, bigger roads is all I have to say and I'm sure most drivers would agree with me*

**East of England**

Q17. Thinking about the longer term, so year 2020 and beyond, what do you think Highways England could do to improve the experience of travelling on the Strategic Road Network for you and your passengers in the future? Base: All SRN users (4,422)

# Long term suggestions to improve the SRN - other mentions

Future improvements  
Other suggestions

Only mentions of 3% or more shown

5%

Fewer roadworks

5%

Too many vehicles

5%

Repair potholes

5%

Finish roadworks quicker

4%

Improve road surfaces

3%

Increase speed limit

3%

Restrictions for lorries/special lanes/certain times

3%

More up-to-date/accurate information

3%

Motorway education for drivers

3%

Greater enforcement of speed cameras

Q17. Thinking about the longer term, so year 2020 and beyond, what do you think Highways England could do to improve the experience of travelling on the Strategic Road Network for you and your passengers in the future? All (4,422)

# Other suggestions for improvements

*More dual carriageways, more fines for bad driving, quality of roads and quicker roadworks*

**London to Scotland West**

*Higher speed limit on motorways and not 50 miles per hour for roadworks when there is nothing happening*

**North Pennines**

*Improve the implementation of roadworks. For example, work 24 hours not just eight hours a day. Fill in potholes, better road signs and markings*

**South Coast Central**

*Roadworks in shorter lengths and finished quicker*

**London to Scotland East**

*Invest in more roads, lorries to travel at night and remove traffic lights. No lorries travelling at weekends*

**Solent to Midlands**

*More smart motorways to control traffic flow*

**South Pennines**

*Need more lanes on M25 but would probably still not be enough for volume of traffic*

**London to Scotland West**

*See lots of cones and no one working there. The cones should be put out when work starts*

**North and East Midlands**

Q17. Thinking about the longer term, so year 2020 and beyond, what do you think Highways England could do to improve the experience of travelling on the Strategic Road Network for you and your passengers in the future? Base: All SRN users (4,422)

# Businesses believe strongly that capacity should be increased

Future improvements  
NET: Road capacity/  
road flow



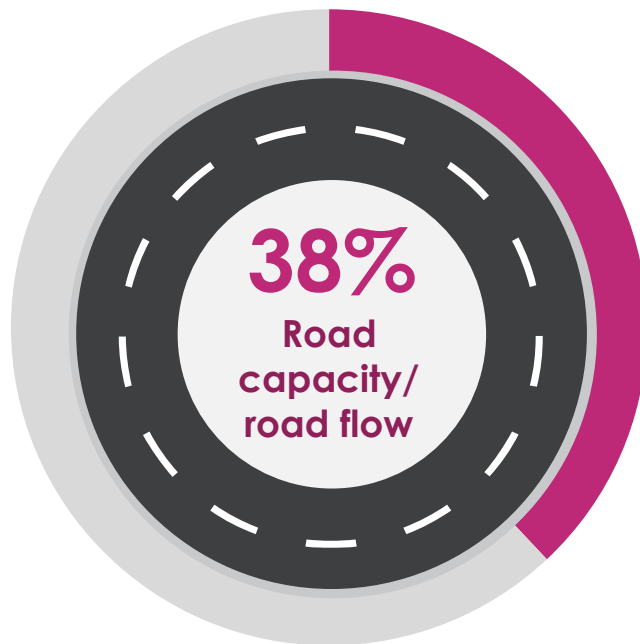
Business  
perspective

17%

Widen roads/motorway  
lanes

9%

Invest more/improve  
roads



38%  
Road  
capacity/  
road flow

10%

Improve flow

9%

Build more/better/  
motorways/underpasses/  
double tier roads

Q15. Thinking about the longer term, so year 2020 and beyond, what do you think Highways England could do to improve the experience of travelling on the Strategic Road Network for your organisation's fleet in the future? All fleet managers giving an opinion (229)

# There is acknowledgement that other interventions may be necessary to alleviate pressures on the network

Future improvements  
Other suggestions



Business  
perspective

Only mentions of 3% or more shown

7%

Too many vehicles

6%

Restrictions for lorries/special  
lanes/certain times

5%

Improve road quality

4%

Encourage public  
transport use

4%

Less roadworks

3%

Better control  
of speed

3%

Better quality  
maintenance

3%

Timely roadworks

3%

More up-to-date/accurate  
information

Q15. Thinking about the longer term, so year 2020 and beyond, what do you think Highways England could do to improve the experience of travelling on the Strategic Road Network for your organisation's fleet in the future? All fleet managers giving an opinion (229)

# Suggestions for improvements

Future improvements  
suggestions



Business  
perspective

“ We need further long term investment in the road network. Needs to be the idea of moving freight on to rail ”

“ Try to ease congestion as everything we do is time-restricted ”

“ The number of lanes needs to increase in line with the increase in population and vehicles on the road ”

“ More capacity in certain areas, particularly some of the pinch points like around Birmingham or Cambridge as that is another pinch point for us ”

“ We are trying to move our fleet to electric cars over the coming years and they need to have fast charging points available. From my own experience the gaps between some service stations may be greater than the range of an electric car before it goes flat ”

“ Improve the structure - more roads, more motorways, more bypasses, that sort of thing ”

“ Better information, maybe some sort of free alert system, so we could see ”

Q15. Thinking about the longer term, so year 2020 and beyond, what do you think Highways England could do to improve the experience of travelling on the Strategic Road Network for your organisation's fleet in the future? All fleet managers giving an opinion (229)

# SRN future focus – Future Thinking's perspective

There is a consistent view on what the drivers of satisfaction are, solutions for alleviating problems and future improvements

## Increasing traffic flow

- Lower congestion
- Increased capacity on SRN

### Potential to also explore greater migration to other modes

*"We should look to remove more heavy fleet and put it on to rail. In Switzerland and Italy it's phenomenal how much is on the rail."* Fleet manager

## Improve A roads

A roads cited as being of a poor quality and poorly maintained

Opportunity to improve and migrate more drivers onto these roads in order to:

- alleviate some of the pressures on Motorways

## Dealing with accidents

Work with emergency services to clear accidents quicker and maintain traffic flow

## Roadworks

More efficient management of roadworks

- Deal with works quickly
- Clearer communication with SRN users of:
  - The work being undertaken
  - Work patterns

Beware of reputational damage associated with delays. This can extend to:

- The affected routes
- Highways England and associated stakeholders

## Focus on hot spots

M25 to Solent  
London Orbital/M23 to Gatwick

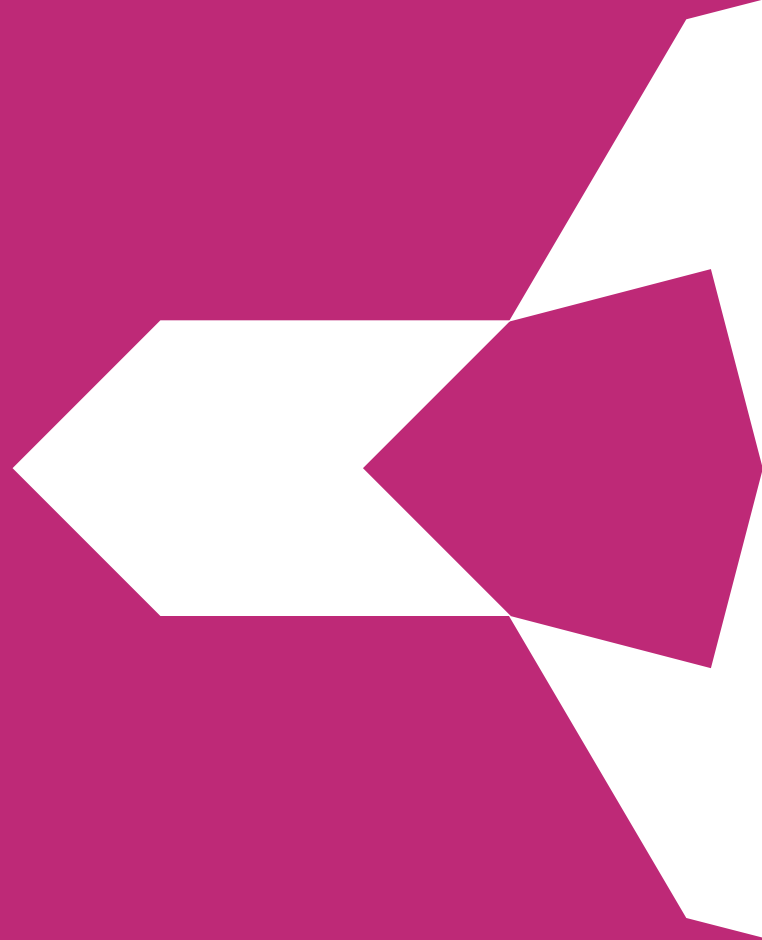
## HE awareness

We know from the Road users' priorities survey that was conducted before Highways Agency (HA) rebranded to Highways England (HE) that:

- Knowledge of HA investment plans was low
- SRN users wished to know what HA was responsible for

Although much has changed within Highways England, there may be some learning opportunities. Greater communication with SRN users is important so that they are aware of the important work HE are doing

Next steps





# Deliverables to follow...

Sampling points/and map

Raw data file

Data tables

Technical report

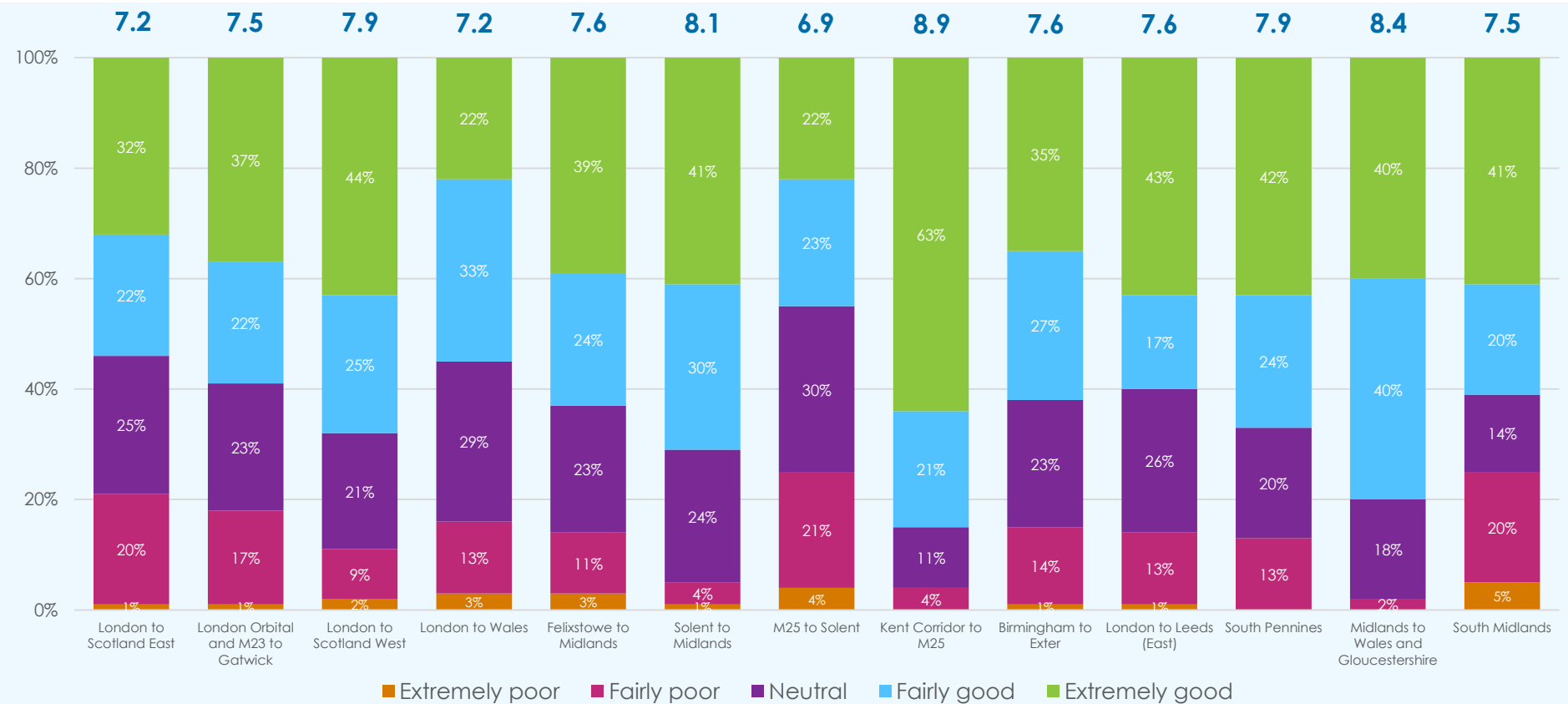
Example of detailed route information - Q14

Route	Which Motorway was difficult to join?	Where did you join	Why was it difficult
London to Scotland East	A52	Bottesford	volume speed of traffic is dangerous
London to Scotland East	131	Climun access road	too dangerous at Kirby Thore



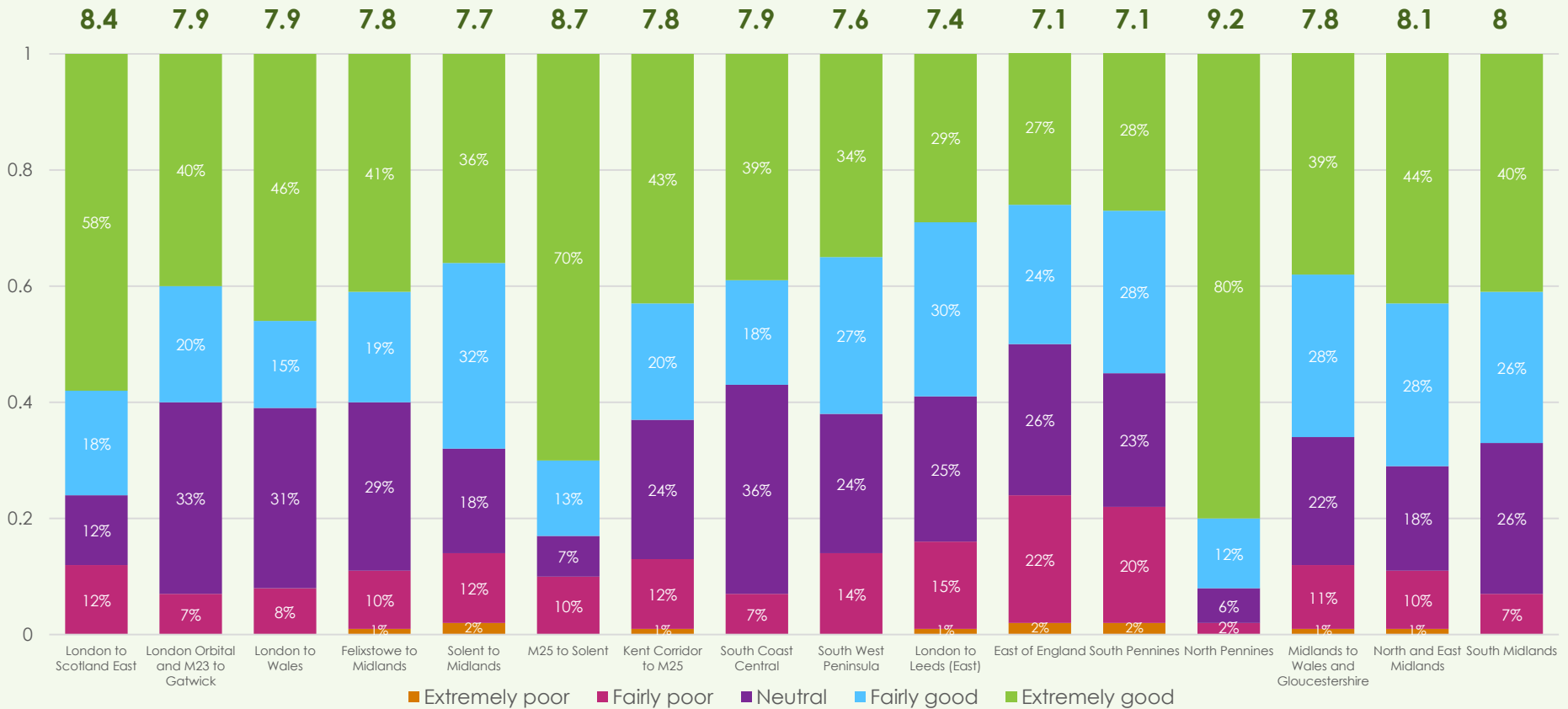
# Appendices

# Journey Experience: Motorways



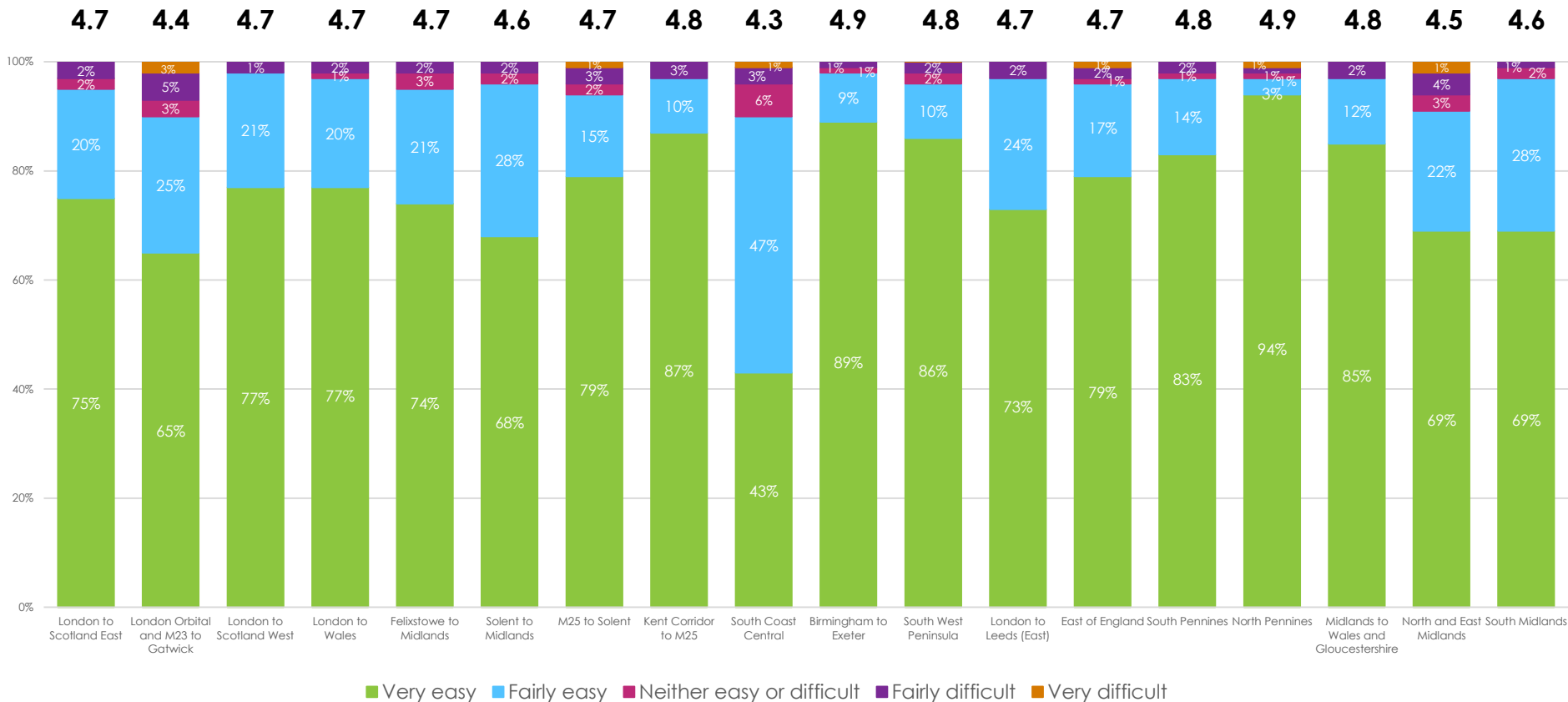
Q9. On a scale of 0 to 10, where 0 is an extremely poor journey and 10 is an extremely good journey, how would you rate your overall journey on the Motorway. Base: All SRN users (4,422)

# Journey Experience: A Roads



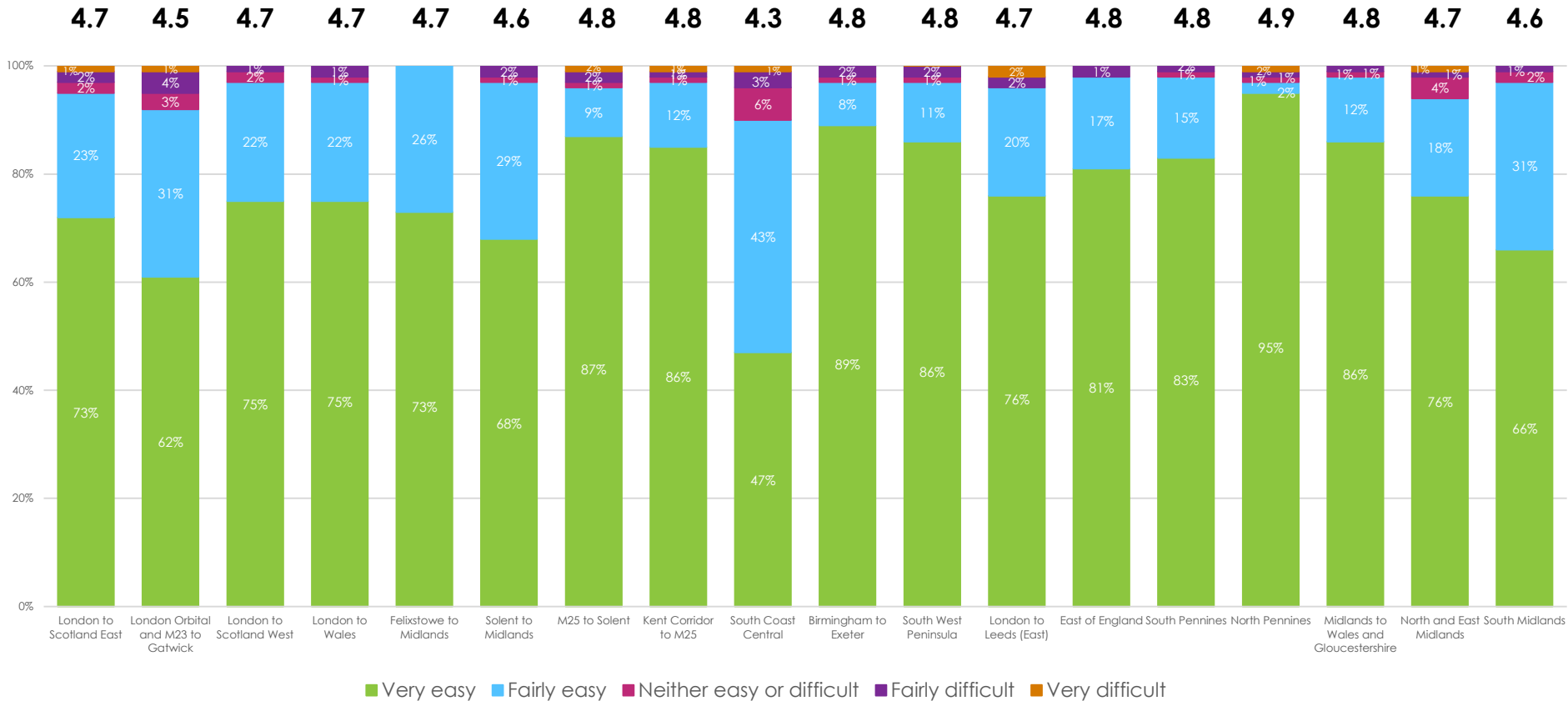
Q11. How would you rate your overall journey on the road? (A Roads) Base: All SRN users (4,422)

# Joining roads



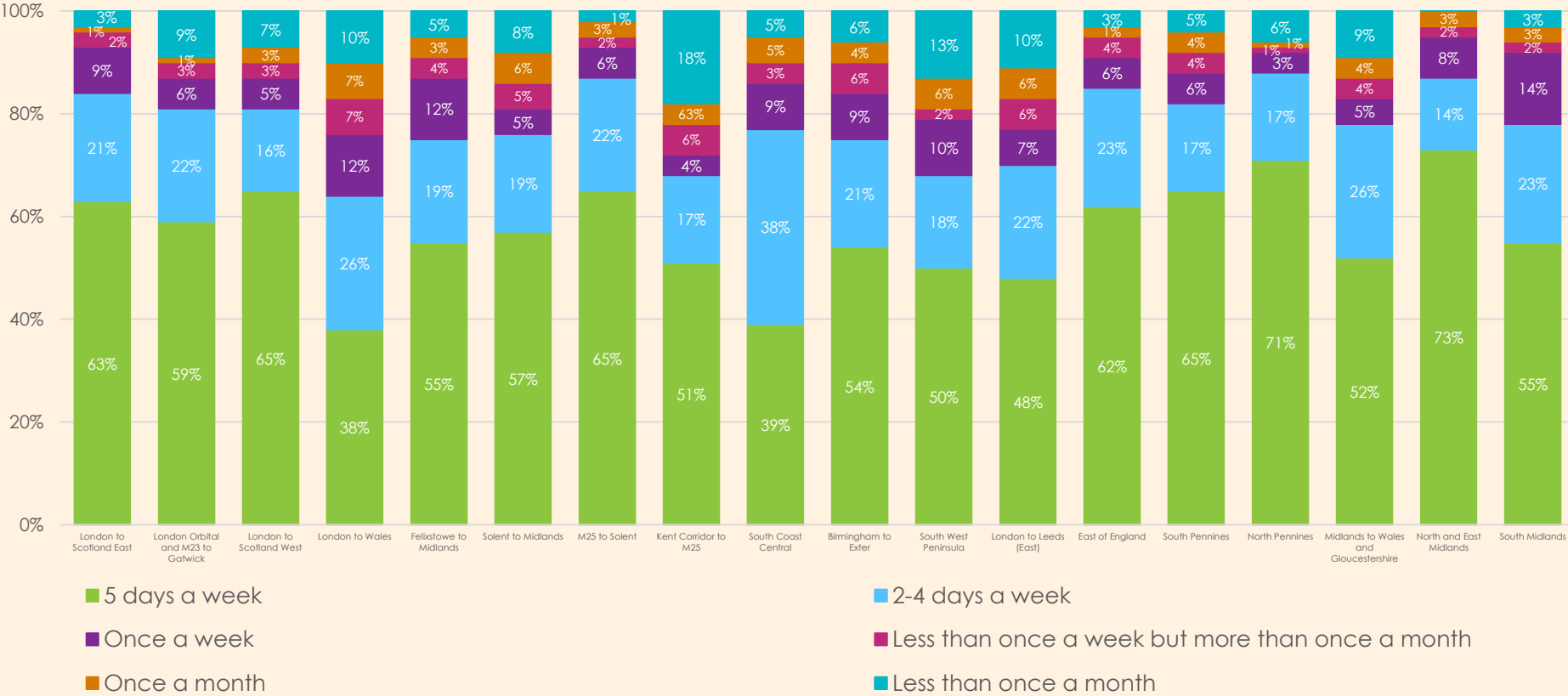
Q13a. And how easy or difficult would you say it was to join any Motorways or Major A roads on your journey today? Base: All excluding those not applicable (4,347)

# Exiting roads



Q13b. And how easy or difficult was it to exit Motorways or Major A roads on your journey today? Base: All excluding those not applicable (4,224)

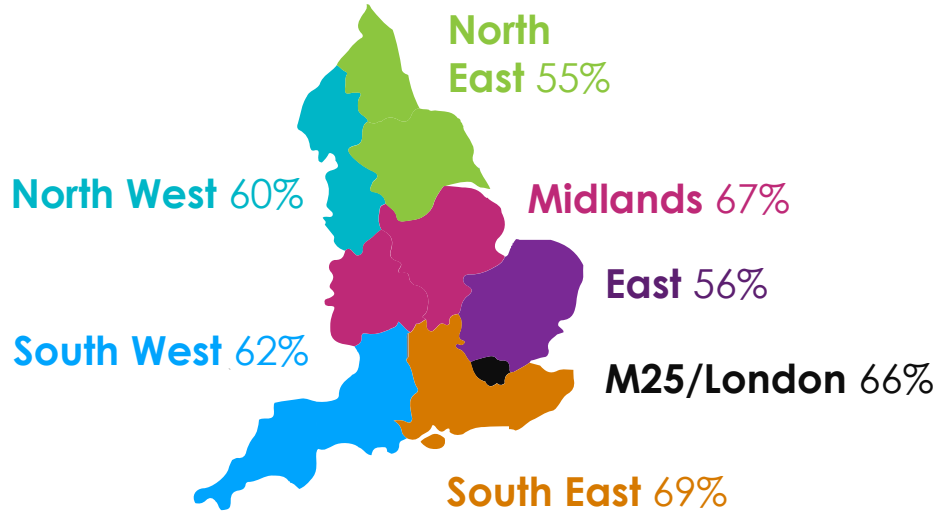
# Frequency on the SRN



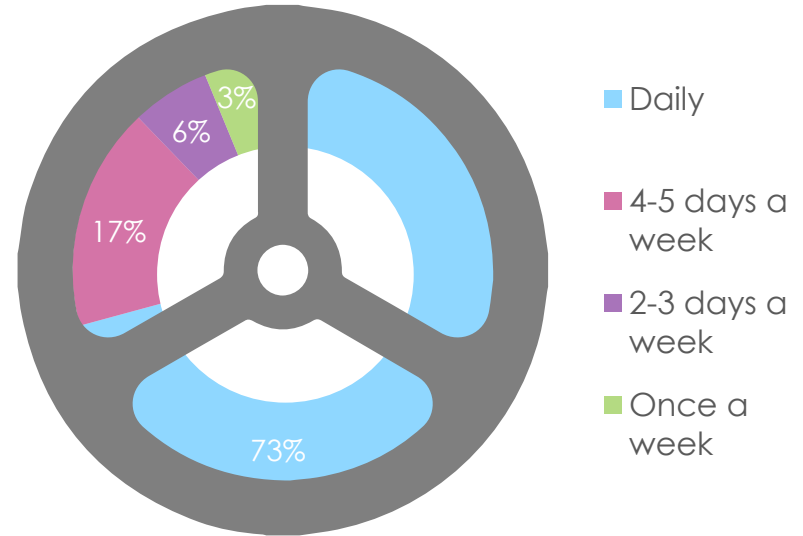
Q18. On average, how frequently do you tend to drive on the Strategic Road Network (i.e. the motorways and A-roads shown here) as a driver? All SRN users (4, 422)

# Businesses tend to operate across several regions

## Areas covered by businesses



## Using SRN



Q2. How regularly does your business use the motorways and main A-Roads in England that make up the Strategic Road Network, for movement of freight/products/people?  
Base: All fleet managers (250)

Q3. Which of the following areas of England does your business cover by road? Base: All fleet managers (250)



