



Road to the future

What road users want from
Highways England's 2020-25 Route Strategies
Summary report
November 2016



Guy Dangerfield

Foreword

Transport Focus aims to be useful to the organisations that provide services for transport users. We think this is the most effective way to improve things for those whose interests we represent.

In 2015 we published *Road users' priorities for improvement*¹, which sets out how road users want to see England's motorways and major 'A' roads improved. Following on from that research, Highways England approached us for assistance in further developing its understanding of road users' expectations, with a view to providing detailed road user input to its Route Strategies² – with those for the period 2020-25 now under development.

Transport Focus is pleased to provide this objective evidence to inform the Route Strategies, and to ensure that road users themselves are at the heart of shaping the road network that is provided for them in future.

The work complements the National Road Users' Satisfaction Survey (NRUSS), which Transport Focus now manages while we develop a replacement. The NRUSS provides a measure of road user satisfaction and what contributes to it. While we ask about satisfaction in this new research, its main aim is to identify issues causing dissatisfaction and to pinpoint how specific improvements to the network might reduce dissatisfaction.

With this latest research we believe the devil is in the detail. The greatest value to Highways England will come from detailed scrutiny of users' journey records, junction by junction and mile by mile, to see that the issues raised are considered for inclusion in the individual Route Strategies. Nevertheless, in this report we highlight key findings of national

importance.

Tackling congestion and poor traffic flow come through as road users' top issues, whether the problem is caused by volume of traffic, roadworks or accidents. Many road users feel that additional capacity is the answer to addressing these issues and should be at the heart of planning road investment for 2020 and beyond.

In our work with rail, bus and tram users we see that the occasional bad experience often contributes to a less favourable overall perception of travel by that mode. Likewise, this research has shown that while an individual journey on the Highways England network may have been satisfactory, users have often experienced problems at other times over the past year. It is important to bear in mind how accumulated experiences build road users' overall opinions regarding road use.

We look forward to continuing our work with Highways England as it develops its Route Strategies and to ensuring that the user's perspective drives the company's thinking and the Government's future Road Investment Strategies.

Guy Dangerfield
Head of Transport User Strategy
Transport Focus

About Transport Focus

We are the independent watchdog representing the interests of passengers on trains across Britain, bus, coach and tram passengers in England (outside London), and users of England's motorways and major 'A' roads. We work closely with train, bus and tram operators, Highways England, government and local authorities – and, of course, with users themselves.

¹The research was published as two reports. Car and van drivers and motorcyclists were covered in:

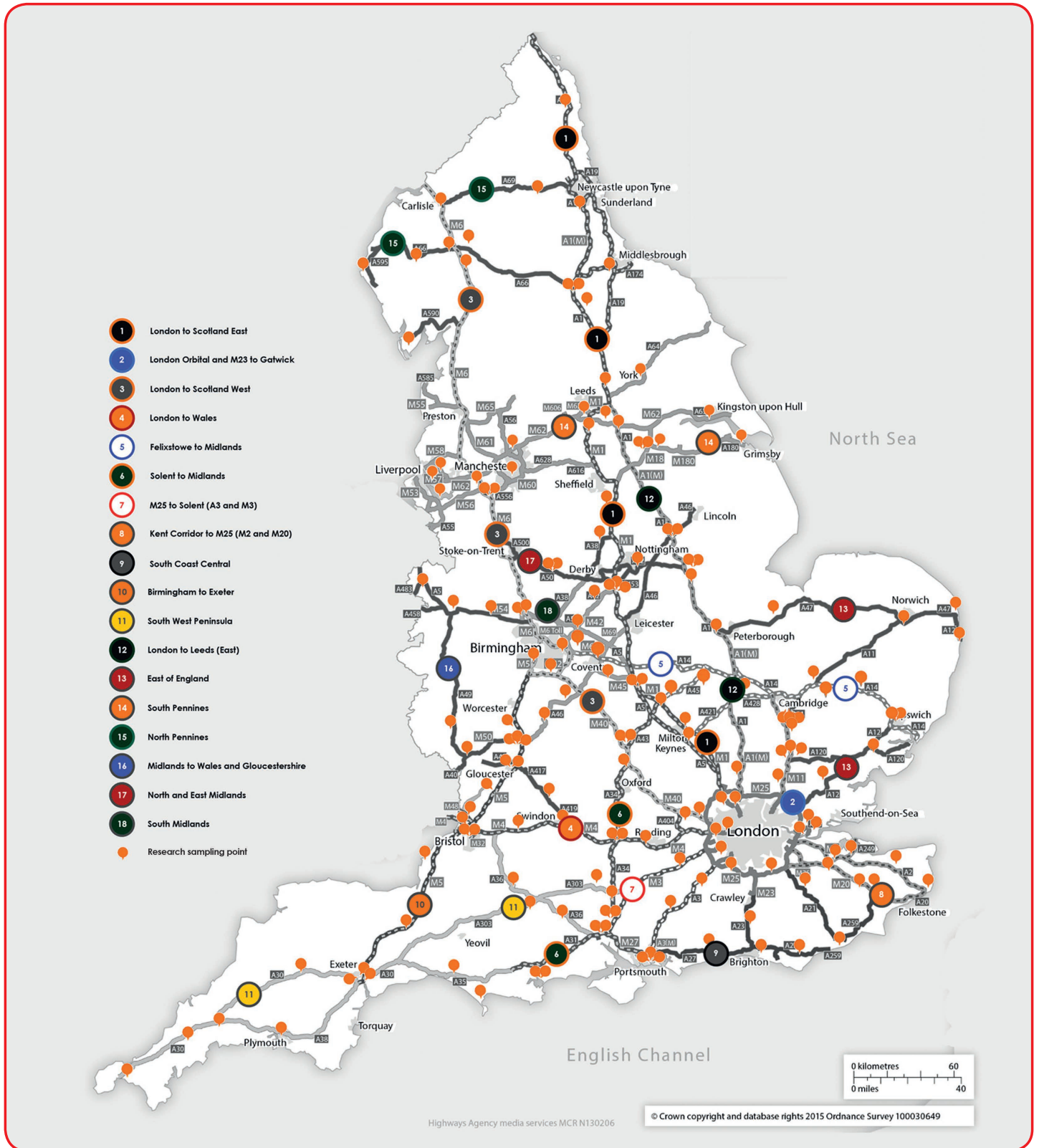
<http://www.transportfocus.org.uk/research-publications/publications/road-users-priorities-for-improvement-car-and-van-drivers-and-motorcyclists/>

and heavy goods vehicle drivers in: <http://www.transportfocus.org.uk/research-publications/publications/road-users-priorities-for-improvement-heavy-goods-vehicle-drivers/>

²Highways England's Route Strategies will set out the issues and opportunities, across the 18 'routes' Highways England breaks its network down into, to be addressed in the Government's Road Investment Strategy for 2020-2025 and successive periods

Map of routes

18 'routes' as categorised by Highways England, along with targeted research locations



Key findings

Satisfaction ratings

The 'in the moment' overall experience of the Highways England network is very positive.

Road users give a rating for their overall journey of 7.6 out of 10 when using a motorway and 7.8 when using a major 'A' road. Unsurprisingly, if users experience a delay to their journey they tend to give a lower rating.

Fleet managers, speaking about the needs of their business, give ratings of 6.5 and 6.3 for motorways and major 'A' roads respectively.

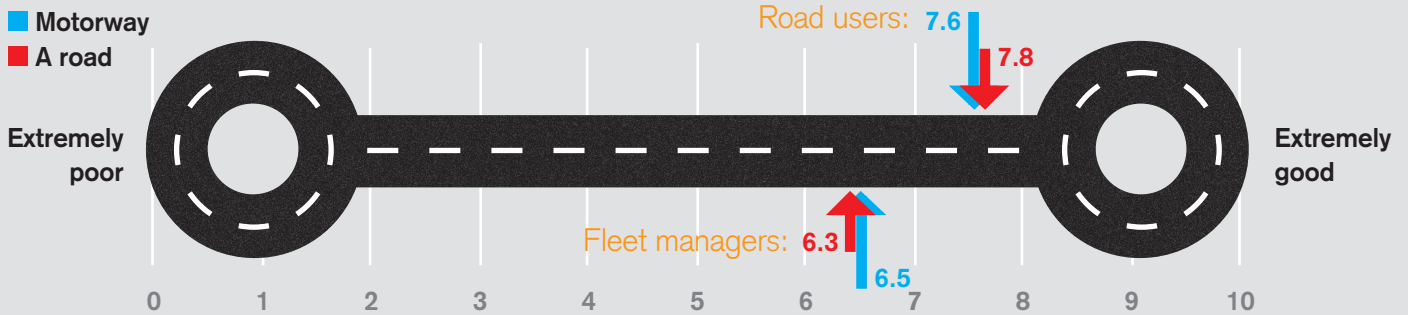
"Lovely motorway, always stress free."

South Midlands

"More like a dual carriageway instead of a motorway. Big HGVs disrupt the flow of traffic."

London to Scotland West

How would you rate your overall journey?



There is little variation between user types, although HGV drivers rate their journeys on major 'A' roads significantly lower than other users:

	Car/van	Motorcyclists	HGV	Coach
Motorways	7.6	7.7	7.5	7.7
'A' roads	7.8	7.7	7.4	7.9

"The potholes on the roads make bike riding dangerous."

Kent Corridor to M25

"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

Users travelling for business (which includes both HGV and car/van drivers) rate their journeys significantly lower than other users, irrespective of whether they were on a motorway or a major 'A' road:

	Leisure	Commuter	Business
Motorways	7.7	7.7	7.5
'A' roads	7.9	8.0	7.4

Reasons for satisfaction ratings

The overriding reason for giving a positive rating (eight, nine or 10) is good traffic flow and lack of congestion (mentioned by 80 per cent of drivers on motorways and 81 per cent on a major 'A' road).

The next highest mention is good quality roads (but this is mentioned by just four per cent on motorways and five per cent on 'A' roads). Turning to those giving a negative rating (zero to five), congestion and slow moving traffic drives dissatisfaction for a third of road users (37 per cent on motorways and 32 per cent on 'A' roads). This is closely followed by roadworks (31 per cent on motorways and 12 per cent on major 'A' roads). The roads being busy and encountering heavy traffic, is mentioned by about one in five (18 per cent on motorways, 19 per cent on 'A' roads). On 'A' roads this is followed by poor quality roads (mentioned by 16 per cent, but five per cent on motorways).

"I don't have a problem with this road, it's spacious and there are four lanes mainly."

London to Leeds (East)

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

South West Peninsula

"Road works, speed restrictions and long delays in the evenings."

London to Wales

"Lost 25 minutes in stop start traffic."

Solent to Midlands

Problems experienced

Nine in 10 journeys were perceived as problem-free on the day, although coach drivers and business users report a significantly higher incidence of problems.

One in 10 road users say they consciously pre-plan their journey to avoid roadworks or road closures (five per cent) and congestion or traffic black spots (four per cent). Less than one in 20 changed their route once on the Highways England network – three per cent to avoid roadworks or road closures and one per cent to avoid congestion or traffic black spots.

89%

...did not experience any problems on the day

11%

...experienced a problem on the day

Experienced a problem

Car/van

Motorcyclists

HGV

Coach

Leisure

Commuter

Business



10%



12%



12%



17%



10%



8%



13%

However, when asked about problems experienced on the route in the past year, four in 10 road users report having experienced a problem. Coach and HGV drivers report a significantly higher incidence.

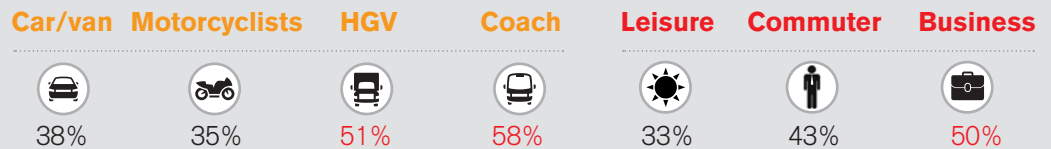
60%

...did not experience any problems in the past year

40%



...experienced a problem in the past year

Experienced a problem



Three quarters of fleet managers say that drivers consistently highlight problems on Highways England's roads to them. This is mostly on motorways, with the M25 mentioned by 45 per cent and the M6 by 35 per cent. Congestion and busy roads top the list of complaints to fleet managers:

Problems encountered by fleet drivers

	%	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	

"Because of the congestion especially on M25, M6 and M11."

"It's always congested. The M6 is the worst, heavy traffic and speed limits slowing down traffic."

London to Scotland West

Routes where users experienced problems

In our work across other transport modes, we have recognised the importance of collecting user feedback ‘in the moment’. Not only is the evidence fresh in users’ minds, it can be related to a specific journey and provide important context to the evidence. We have also demonstrated how, on rail for example, the vast majority of journeys are rated ‘satisfactory’ but overall perceptions of the rail network can be quite negative. Users are human, and they have an innate tendency to remember bad experiences and forget the good ones when everything went according to plan.

With this piece of research, we see that this holds good for roads as much as it does for public transport – the majority of road users’ journeys were problem-free, but when asked about their experiences over the past year four in ten users have experienced a problem. The table below lists the individual routes according to the number of drivers reporting problems on them in the past year. For each route, the table shows the problem(s) most frequently mentioned. The map at the beginning of this report shows the individual ‘routes’ Highways England breaks its network down into.

More than half the drivers we spoke to on the M25 to Solent (A3 and M3) route and London Orbital/M23 to Gatwick route had experienced a problem on that route in the past year. As with most routes, congestion and traffic queuing are the major issues.





At the other end of the scale, less than a fifth of drivers interviewed on the North Pennines route report experiencing a problem on that route in the past year. For them, roadworks were the biggest issue.

Key problems by route			
Route	% experiencing problems	Most mentioned problem	%
M25 to Solent (A3 and M3)	61	Congestion/queuing	61
London Orbital and M23 to Gatwick	58	Congestion/queuing	48
South Coast Central	50	Congestion/queuing	33
		Roads busy	31
Solent to Midlands	46	Congestion/queuing	49
East of England	44	Congestion/queuing	50
Birmingham to Exeter	43	Congestion/queuing	42
		Roadworks	36
South West Peninsula	41	Congestion/queuing	43
North and East Midlands	41	Congestion/queuing	65
London to Scotland East	40	Roadworks	56
South Pennines	40	Congestion/queuing	61
Kent Corridor to M25 (M2 and M20)	39	Congestion/queuing	42
London to Scotland West	37	Congestion/queuing	46
		Roadworks	46
Midlands to Wales and Gloucestershire	32	Congestion/queuing	31
		Roadworks	30
		Roads busy	30
Felixstowe to Midlands	30	Congestion/queuing	43
South Midlands	30	Congestion/queuing	52
London to Leeds (East)	28	Accidents/road closures	47
		Congestion/queuing	41
London to Wales	27	Congestion/queuing	60
North Pennines	17	Roadworks	55

Journey planning

Three quarters of drivers we spoke to say they are familiar with the journey they are making. One quarter report using digital navigation tools and just two per cent a paper map. Use of digital navigation rises to a third amongst HGV drivers.

Use of digital navigation

Car/van	Motorcyclists	HGV	Coach
			
26%	16%	32%	25%

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

London to Scotland West

"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

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

Solent to Midlands

Looking to the future

We asked road users to think about the longer term, so year 2020 and beyond, and to tell us what they think Highways England could do to improve the experience of travelling on the SRN.

A quarter mention improvements in road capacity and traffic flow; 18 per cent specifically mention building more/better motorways/underpasses and 'double deck' roads. Other suggestions (mentioned by five per cent or less) include fewer roadworks, finishing them quicker, repairing potholes, reducing traffic volumes and improving road surfaces.

Fleet managers are even more concerned about road capacity and traffic flow (mentioned by 38 per cent). 17 per cent mention widening roads/building more lanes and around one in 10 suggest improving the traffic flow, investing more to improve the roads and building more/better motorways/underpasses.

"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

Conclusions

Whether issues are attributed to the volume of traffic, roadworks or accidents, it is clear that road users regard a reduction in congestion and improvements in traffic flow on England's motorways and major 'A' roads as crucial improvements for the medium/longer term (that is, 2020 and beyond). Many conclude that road capacity needs to be expanded.

The M25 to Solent (A3 and M3) route and London Orbital/M23 to Gatwick route are highlighted as generating most problems. However we note that issues on the M3 are probably down to work currently going on to upgrade part of it to 'smart' motorway, with a view to improving traffic flow.

The research has shown that while the majority of individual journeys on the Highways England network are satisfactory, many users have experienced problems at other times over the past year. In our earlier work on road users' priorities for improvements we noted that both the quality of the road surface and other drivers' behaviour featured alongside capacity and traffic flow issues. We believe the reason road surface quality, in particular, does not feature as strongly in the current research is that it is seen by road users more as a maintenance problem they want addressed in the short term. When asked to focus on 2020 and beyond, road users think about the longer-term strategic challenge presented by increasing traffic volumes and the capacity issues arising from this.

"Improve the structure – more roads, more motorways, more bypasses, that sort of thing."

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

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

London to Leeds (East)

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

East of England

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

Felixstowe to Midlands

About this research

This research was commissioned by Transport Focus on behalf of Highways England to provide road user input to the detailed strategy for 2020-25 currently being developed for each of the 18 'routes' that Highways England breaks the Strategic Road Network into (see map on p3). The research was designed to provide detailed feedback on each route and to identify, so far as practical, specific junctions or stretches of road causing issues for road users. Highways England has received the detailed feedback from individual interviews enabling the company to consider, assess and use this information in developing each route strategy.

This report provides an overview of the findings at a national level and identifies those routes that are reported as being better or worse than the average. A full slide deck of the research agency's findings at the national level findings, including full details

of the sample and methodology, is available on the Transport Focus website at: www.transportfocus.org.uk/research-publications/publications/road-to-the-future/

The research was carried out by independent research agency Future Thinking (www.futurethinking.com) between 19 May and 3 July 2016. It comprised 4422 face-to-face interviews with road users and 250 telephone interviews with fleet managers in a cross section of businesses. The road user sample was made up of 3487 car/van drivers, 407 HGV drivers, 322 motorcyclists and 206 coach drivers; these were making 2457 leisure, 1367 business and 501 commuting journeys. Drivers were approached at a total of 137 locations across the network; the locations were a mix of service areas, retail parks and town centres on Highways England's roads. Location data was weighted on route traffic flow to provide an accurate national picture.





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Transport Focus is the operating name of the Passengers' Council.

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