



# Logistics and Coach Manager Survey:

England's strategic roads  
November 2018



# Foreword

The freight logistics and coach industries are key users of the motorways and major 'A' roads managed by Highways England. Transport Focus represents the interests of all users of these roads, including businesses moving goods and people along them.

**T**his new survey measures satisfaction among managers working for freight, logistics and coach companies about motorways and major 'A' roads managed by Highways England and the service provided to them. We are pleased to have had assistance in developing this survey from the Confederation of Passenger Transport, the Freight Transport Association and the Road Haulage Association along with their efforts to encourage members to participate if asked.

Our key findings are:

- half of managers taking part are satisfied with Highways England's roads in relation to their business
- businesses don't feel their needs are considered sufficiently by Highways England, especially in relation to how roadworks are carried out
- managers think poor road surfaces are costing them money
- businesses believe the need to adhere to regulations that govern drivers' hours and the time-critical nature of their operations is not sufficiently front of mind for Highways England when incidents disrupt traffic
- businesses want more parking spaces and better vehicle security at roadside services, and for them to offer better value for money
- managers want to know about roadworks sooner, especially where roads will be closed entirely.

Transport Focus will use these findings to press for greater focus on the needs of these important users of Highways England's roads. We are currently considering how frequently to repeat this survey, which we hope will become one of the 'reported metrics' used to monitor Highways England's performance from 2020 to 2025.

We reiterate our previous call for Highways England to consider whether a small cross-directorate business unit focused solely on meeting the needs of these important industries would be beneficial. It would have parallels with Network Rail's 'freight and national passenger operators' function which is led by its own director.

**Anthony Smith**  
Chief Executive

# Introduction

All operators of vehicles over 3.5 tonnes are licensed by the Driver and Vehicle Standards Agency, with information about them held in a publicly-available database – popularly called the ‘O’ licence database. Transport Focus drew its sample of businesses from that list to make sure

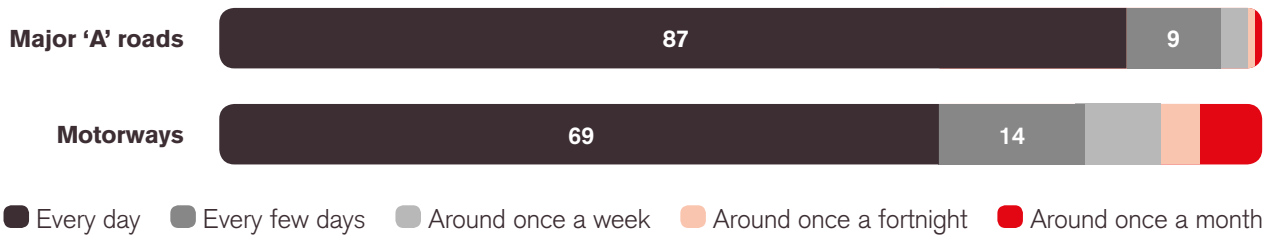
this survey captured views from operators with a small and large numbers of vehicles. 1000 managers in the logistics and coach industries responded to the survey, which asked about aspects of motorways and major ‘A’ roads in England as they relate to running their business.

# Results

We found that a vast majority of businesses which responded use the Highways England network at least once every few days, with major ‘A’ roads used a little

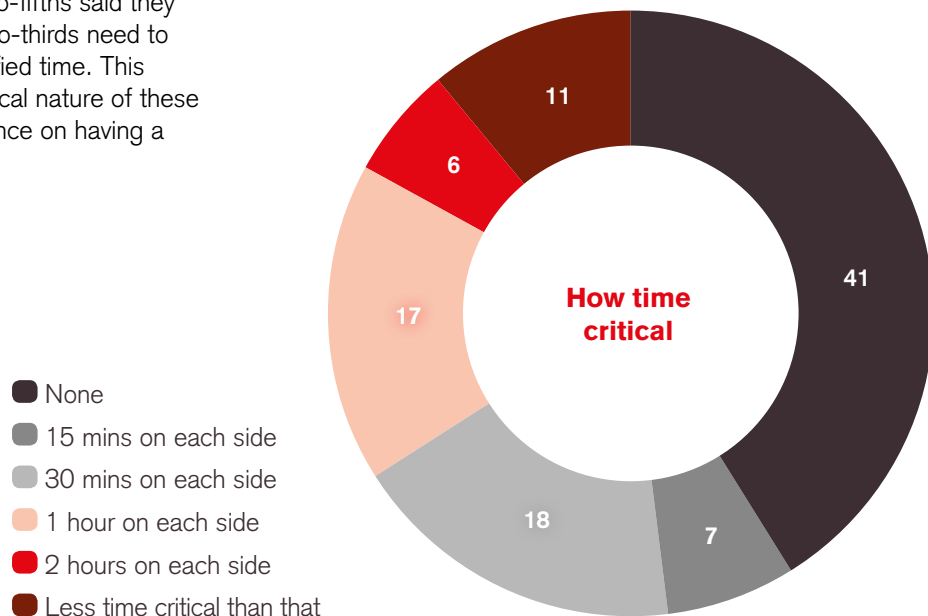
more frequently than motorways. The frequency of usage underlines how central these roads are to the routine operations of these companies.

## 1 Motorway and major ‘A’ road use



We asked how much leeway, in terms of time, these organisations have when delivering goods or adhering to coach schedules. Two-fifths said they have no contingency time and two-thirds need to arrive within an hour of the specified time. This questions highlights the time-critical nature of these two industries and their dependence on having a reliable road network.

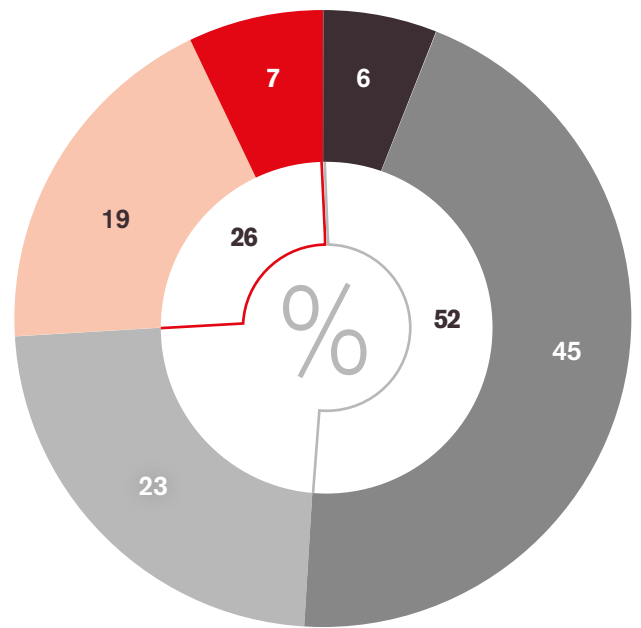
## 1 Leeway on arrival times



## Overall satisfaction

We asked the question "Thinking overall about the motorways and major 'A' roads of England, how satisfied or dissatisfied are you with the way they meet your needs as a business?". Our results show that half (52 per cent) of the businesses who participated in this survey are satisfied overall with the Highway's England motorway and 'A' road network, but that just over one quarter (26 per cent) are dissatisfied. Six per cent said they were very satisfied, and seven per cent were very dissatisfied.

### 2 Overall satisfaction



- Very satisfied
- Fairly satisfied
- Neither / nor
- Fairly dissatisfied
- Very dissatisfied

## Information used to plan routes

Among the businesses taking part in the survey, lorry and coach drivers confirmed they have a significant role in choosing their route, with route planning mostly taking place a few days in advance.

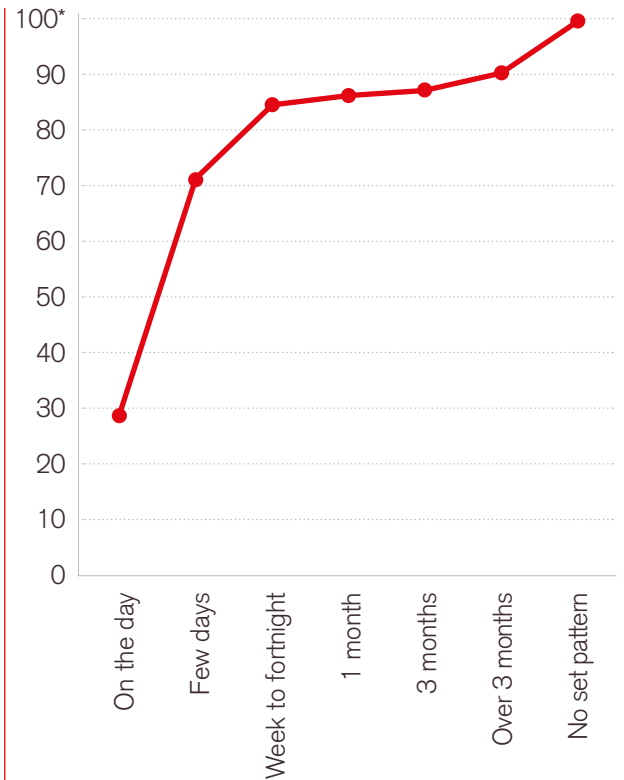
### 4 How much drivers' routes are specified



- Precisely follow route given
- Should follow route, but can deviate in exceptional circumstances
- Route given as a guidance only
- Route is totally up to drivers

We asked about the availability of information to help plan routes. The proportion of negative responses was equal to or exceeded that for positive responses when it came to being warned when roads would be closed completely; being given advance notice about roadworks; and the impact of lane closures or reduced speed limits.

### 5 How far in advance they plan drivers' routes



\*Cumulative per cent

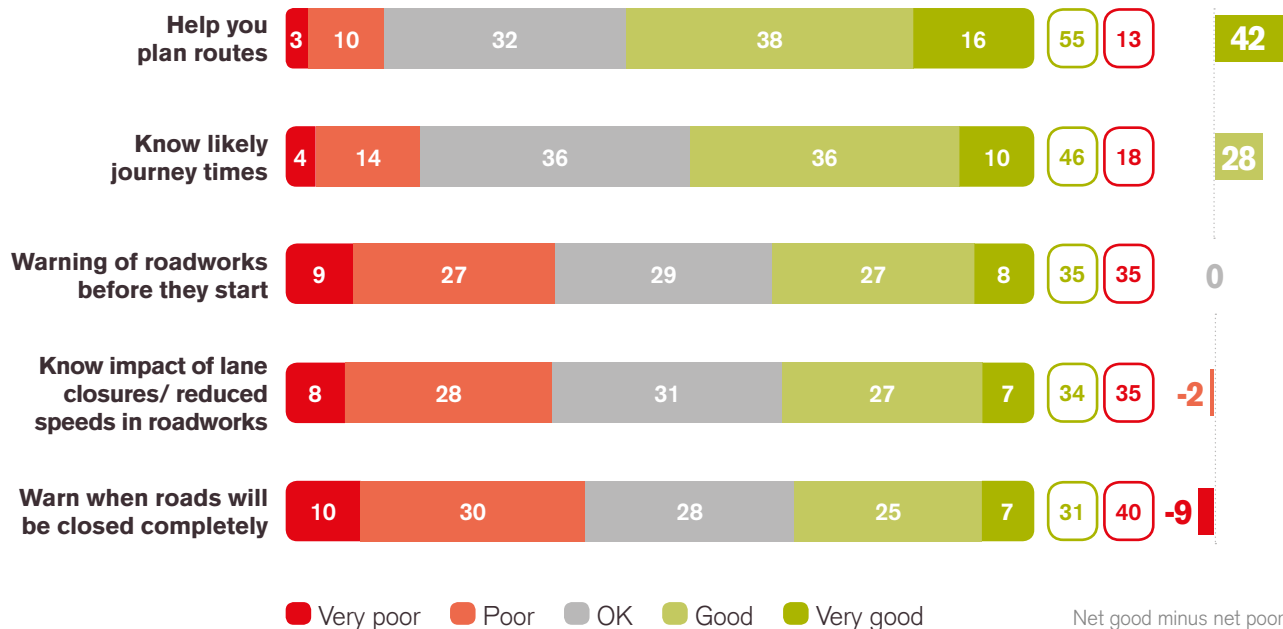


"They should let us know in advance about roadworks. They just start working and we find out when the driver gets there."

"Engagement with road transport operators in good time for roadworks."

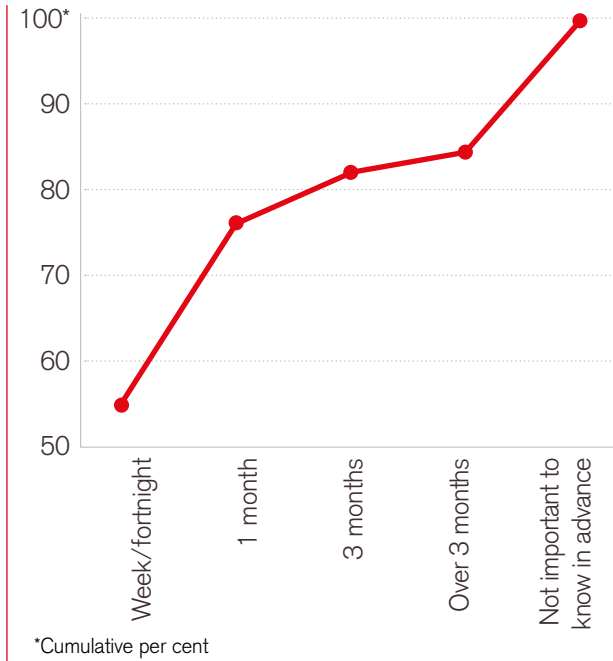


## 6 Rating of availability of information



We asked how far in advance managers want to find out when roadworks will take place. A month's notice would satisfy around three-quarters, while a week's notice would meet the needs of half those surveyed.

**7 How far in advance planning information was wanted by managers**



"Give us information plenty of time before what happens on the roads."

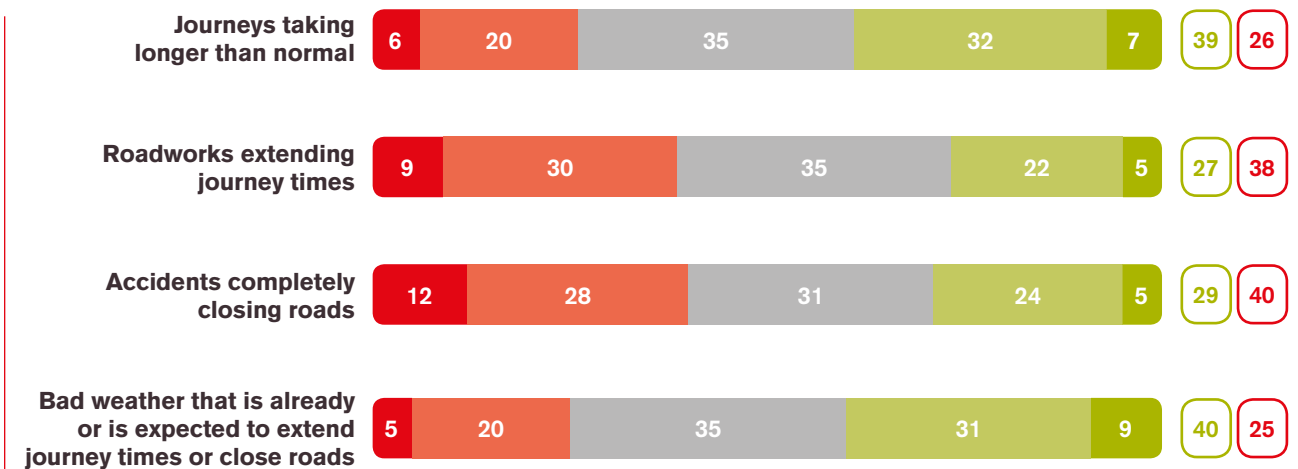
"Some kind of system that was a warning just for HGV's about accident would be great and they could alter their route rather than adding to the congestion."

**Information on the day**

The quality of information about roadworks which extend journey times, and information when accidents completely close roads, had more negative responses than positive

ones. Information about journeys taking longer than normal and about bad weather affecting journey times was judged 'poor' by one in four businesses.

**8 Rating of information on the day**



Bad weather ... is rated worse by Standard compared to Restricted (net +10% rather than +24%)

Very poor Poor OK Good Very good

Net good = very good + good  
Net poor = very poor + poor

## Electronic road signs

We asked "how would you rate the electronic roadside signs on motorways and major 'A' roads for enabling your drivers to make 'in the moment' decisions."

Of those businesses who participated in the survey, half were satisfied and less than a fifth were dissatisfied.

### 9 Ratings of electronic road signs



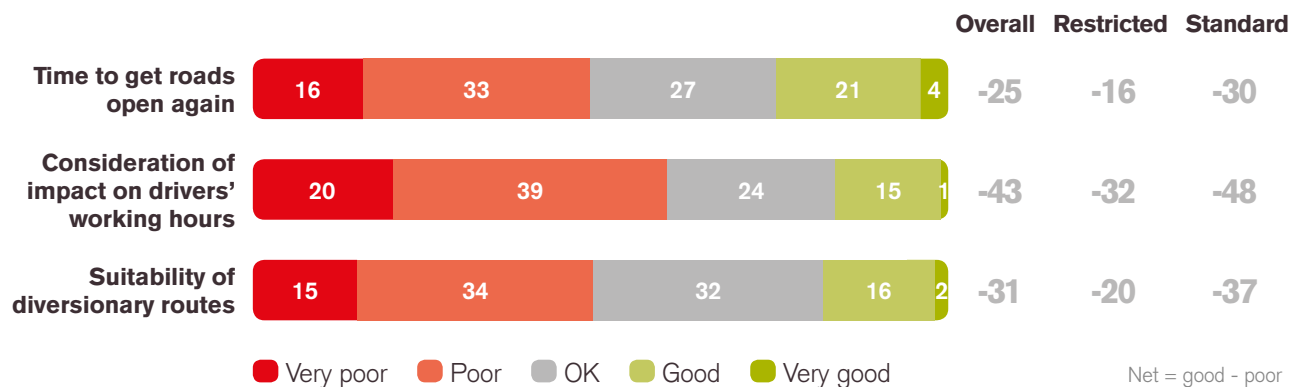
"Just changing the electronic road signs quicker. Keeping them updated."

## Accident/incident management

Many managers were negative about this aspect of Highways England's roads. Consideration of the impact on drivers' working hours rated most poorly, with time taken to get roads open and the suitability

of diversions faring only a little better. These ratings chime with managers' views about information on the day (which might have helped them avoid the badly affected stretches of road).

### 10 Ratings of accident/incident management



"When there has been an accident it takes too long to remove it. We are losing many man hours."

"If there is an accident, being able to get around it a bit quicker. We have had to turn drivers round on a few occasions."

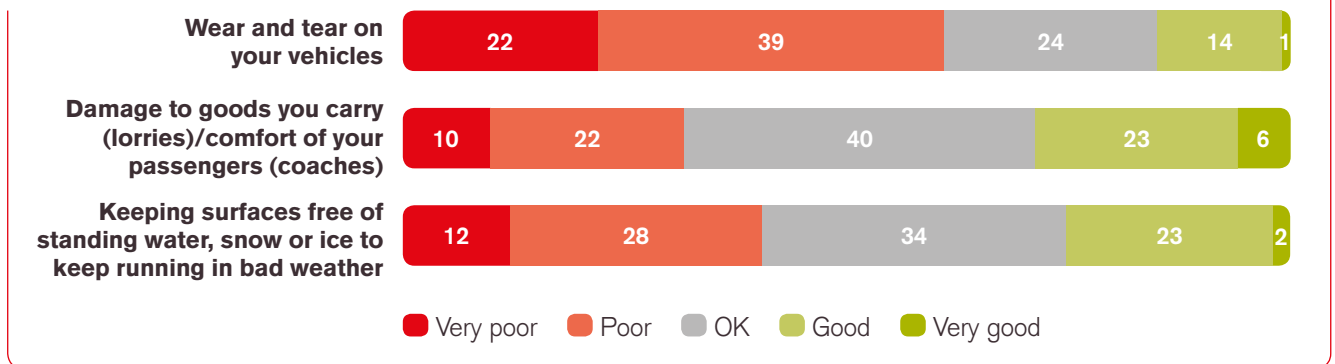


## Road surfaces

When we asked about aspects of road surface quality, negative views from these businesses outweighed positive ones. There was a strong view that poor surface quality costs them money. This principally

related to wear and tear on vehicles and tyres, with only 15 per cent saying surface quality was good compared with 61 per cent saying it was poor in this respect.

### 11 Rating of road surface quality



"Pot holes are terrible, and each tyre costs a hundred quid and when they truck come back in they have tears and rips. It is costing us a lot of money."

"Better surfaces, when they get repaired it's not deep enough. Due to bad weather and traffic the repairs get pulled up too easily."

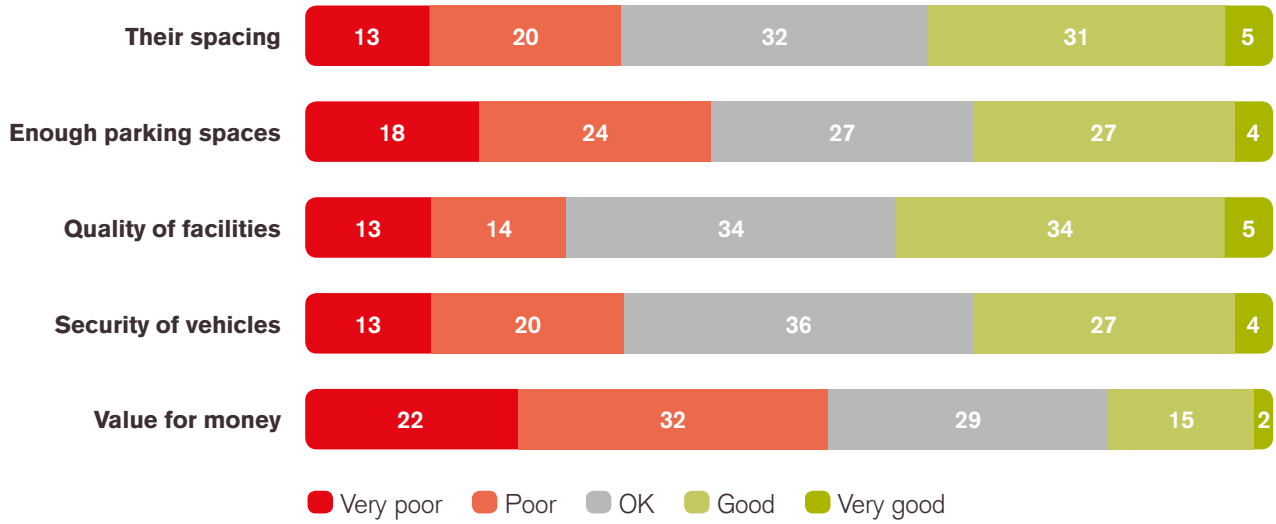


## Roadside services

It is clear from the survey results that managers in the logistics and coach industries feel that service areas do not serve their needs or businesses well. Value for money scored

poorly, as did the provision of sufficient parking spaces and adequate security for vehicles whilst they are parked. These findings accord with other Transport Focus research.

### 12 Rating of road surface quality



"Better parking for lorries, when I started driving 43 years ago we had a lot of truck stops which have all but disappeared."

"Much better parking facilities (showers and toilets). More parking areas for driver breaks, safe areas not laybys with mud covered in potholes."



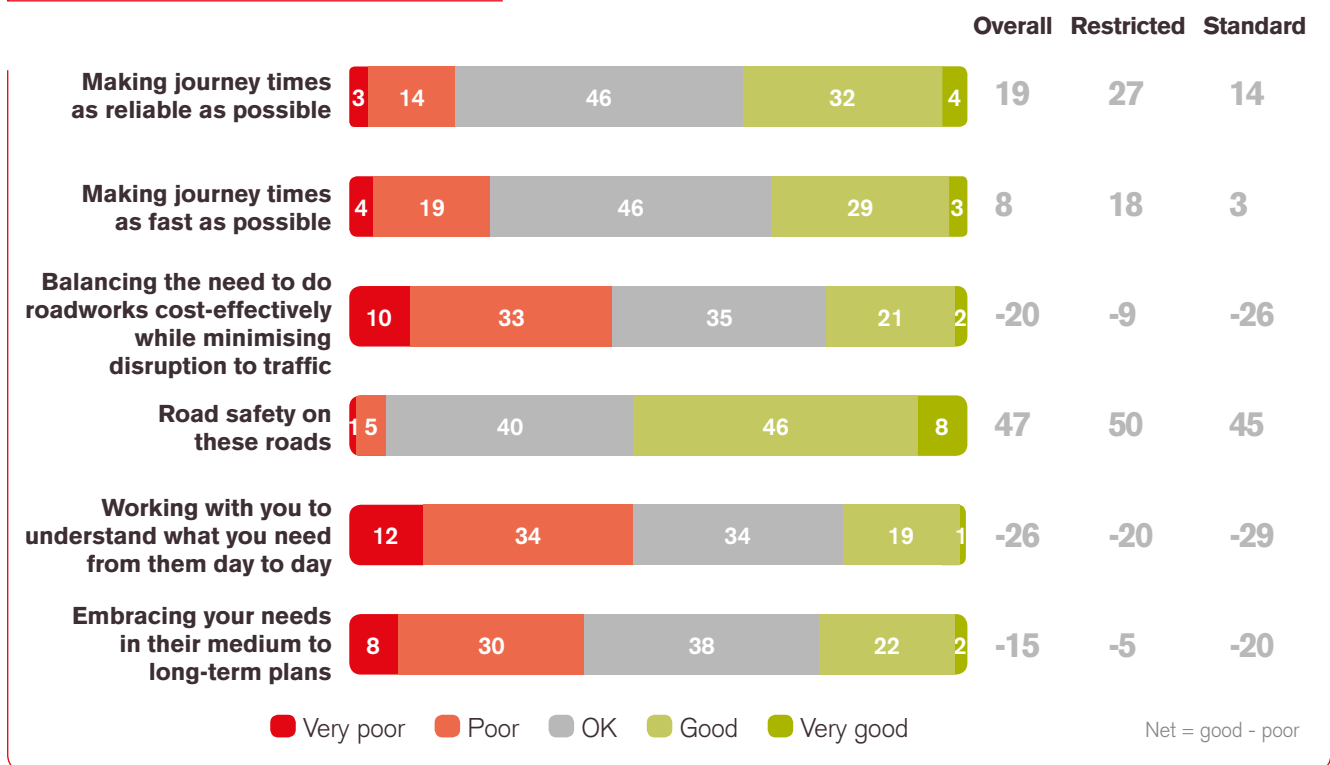
## How logistics and coach managers view Highways England

Less than one in ten (9 per cent) of managers surveyed said they had a full understanding of Highways England's role. Just under half felt they had a reasonable understanding. A quarter (26 per cent) said they understood the company's role only 'a bit', and more than one fifth (21 per cent) 'very little or not at all'.

As might be predicted from this level of understanding, negative views outweighed positive ones

when it came to questions about how far Highways England recognises and embraces their needs as businesses. This negativity was most marked with reference to the issues of 'balancing the need to do roadworks cost-effectively while minimising disruption to traffic'; 'working with you to understand what you need from them day to day'; and 'embracing your needs in their medium to long-term plans'.

### 13 Rating of Highways England for ...



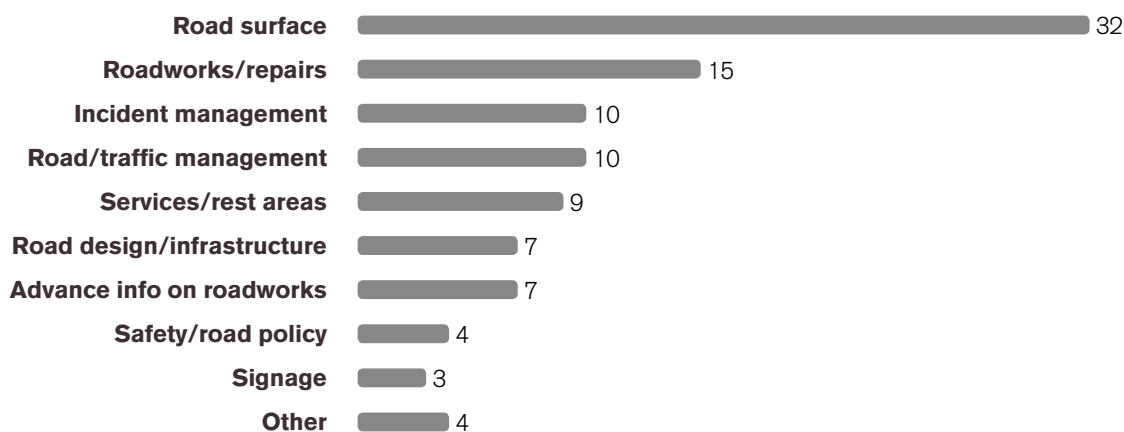
"Less road closures. Speak to Highways England and they cannot tell you if a road is going to be closed, they say call back at 8pm or after. They will not give you a diversion route."

"Better timed roadworks. There should be more communication between us and Highways England."

## What do logistics and coach managers want to see improved?

The greatest number of comments were around improving road surfaces, followed by improving roadwork and the management of incidents.

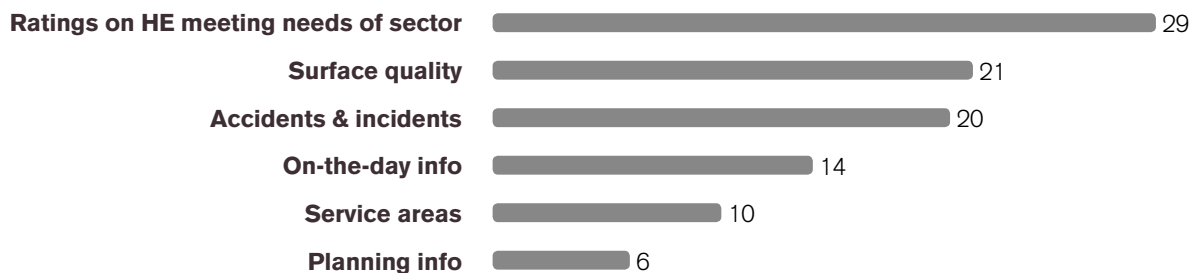
### 14 Areas for improvement (%)



This was backed up by statistical analysis of what drives overall satisfaction. Road surfaces featured again strongly, as well as accident and incident handling,

alongside the analysis showing the importance attached to how much Highways England embraces their needs as businesses.

### 15 What drives satisfaction (%)



"More meetings with hauliers in relation to things that impact operators. They would have to be in regional areas to do that, but signs are not always enough."

"The trouble is every road is different, but the overriding issue would be the pot holes are over time they cause damage and 'knacker' the vehicle up."

## Contact Transport Focus

Any enquiries about this report should be addressed to:

Murray Leader

Senior Insight Advisor

[Murray.Leader@transportfocus.org.uk](mailto:Murray.Leader@transportfocus.org.uk)

Transport Focus

Fleetbank House

2-6 Salisbury Square

London

EC4Y 8JX

[www.transportfocus.org.uk](http://www.transportfocus.org.uk)

Transport Focus is the operating name of the Passengers' Council

**Transport Focus is the independent consumer organisation representing the interests of:**

- rail passengers in Great Britain
- all users of England's motorways and major 'A' roads (the Strategic Road Network)
- bus, coach and tram users across England outside London.

**We work to make a difference for all transport users**