



Populus

M4 Smart motorway roadworks May 2019 – quantitative research (wave 1)

Understanding road user awareness and knowledge

transportfocus 

 highways
england

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SECTION 1

Background, approach and who we spoke to

Detailed methodology



Face-to-Face

MSA	Shifts	Road users interviewed
Membury EB	2	36
Membury WB	4	83
Heston EB	2	27
Heston WB	2	22
Chieveley	5	105
Cobham	5	103
Reading EB	3	54
Reading WB	2	32
Total	25	462



Online Survey

Sample Type	Road users interviewed
Driver: London/South East*	304
Driver: Elsewhere*	205
<i>Driver Total</i>	<i>509</i>
Fleet managers	205
Total	714

We report on a total base of drivers (**n=971**), and show fleet managers as a separate group due to their different profile

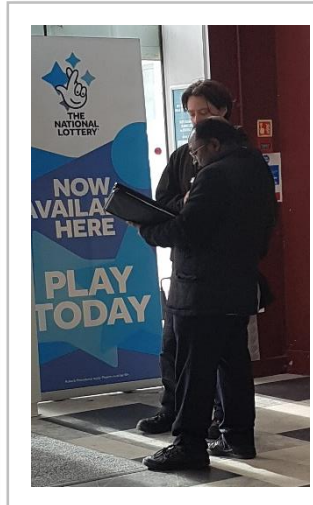
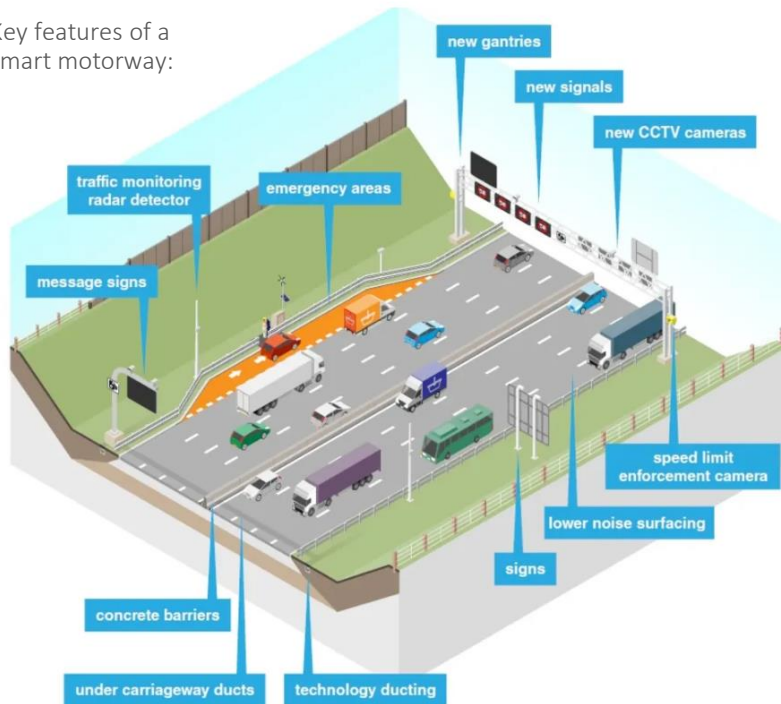
We have also applied a 50/50 weight to the Face-to-Face and Online (Driver) split to ensure both samples are equally represented in the total

- London/South East: Live in London or South East and used M4 between junctions 3 and 12 in last month
- Elsewhere: Live in Yorkshire & Humber, Midlands, Wales, South West or Eastern England and used M4 between junctions 3 and 12 in last three months

The M4 smart motorway upgrade

The M4 is the main strategic route between London, the West of England and South Wales

Key features of a smart motorway:



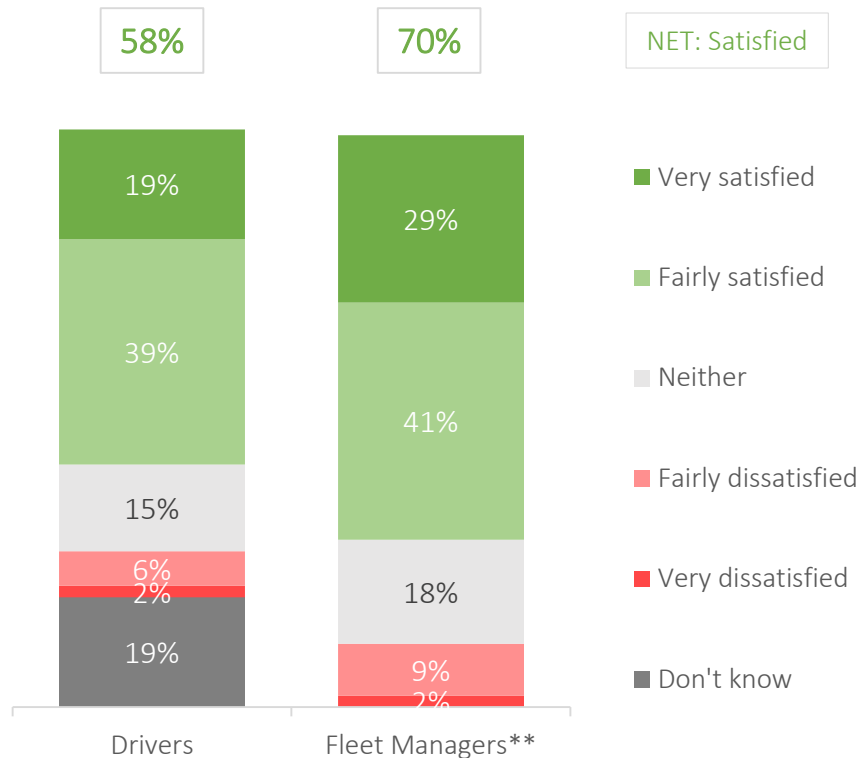
SECTION 2

Journey satisfaction

Journey satisfaction

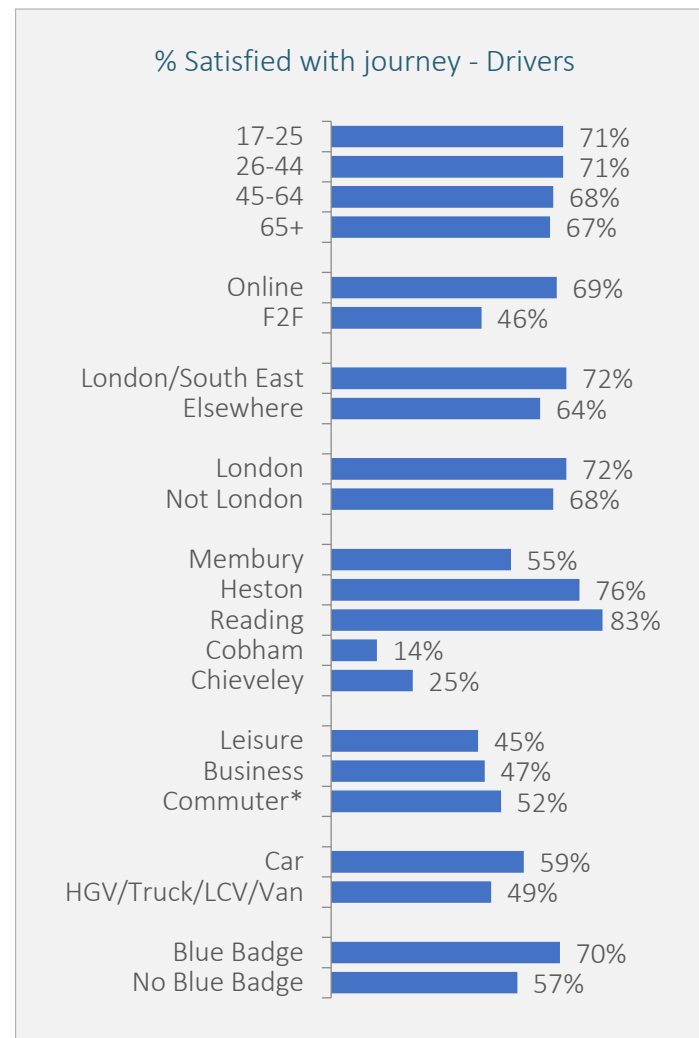
Over half were satisfied with their most recent journey; satisfaction is highest among those currently affected by the roadworks (London/South East and Reading) and Blue Badge holders. Perceived satisfaction among fleet managers is higher than claimed satisfaction among HGV drivers

Based on all road users



NET: Satisfied

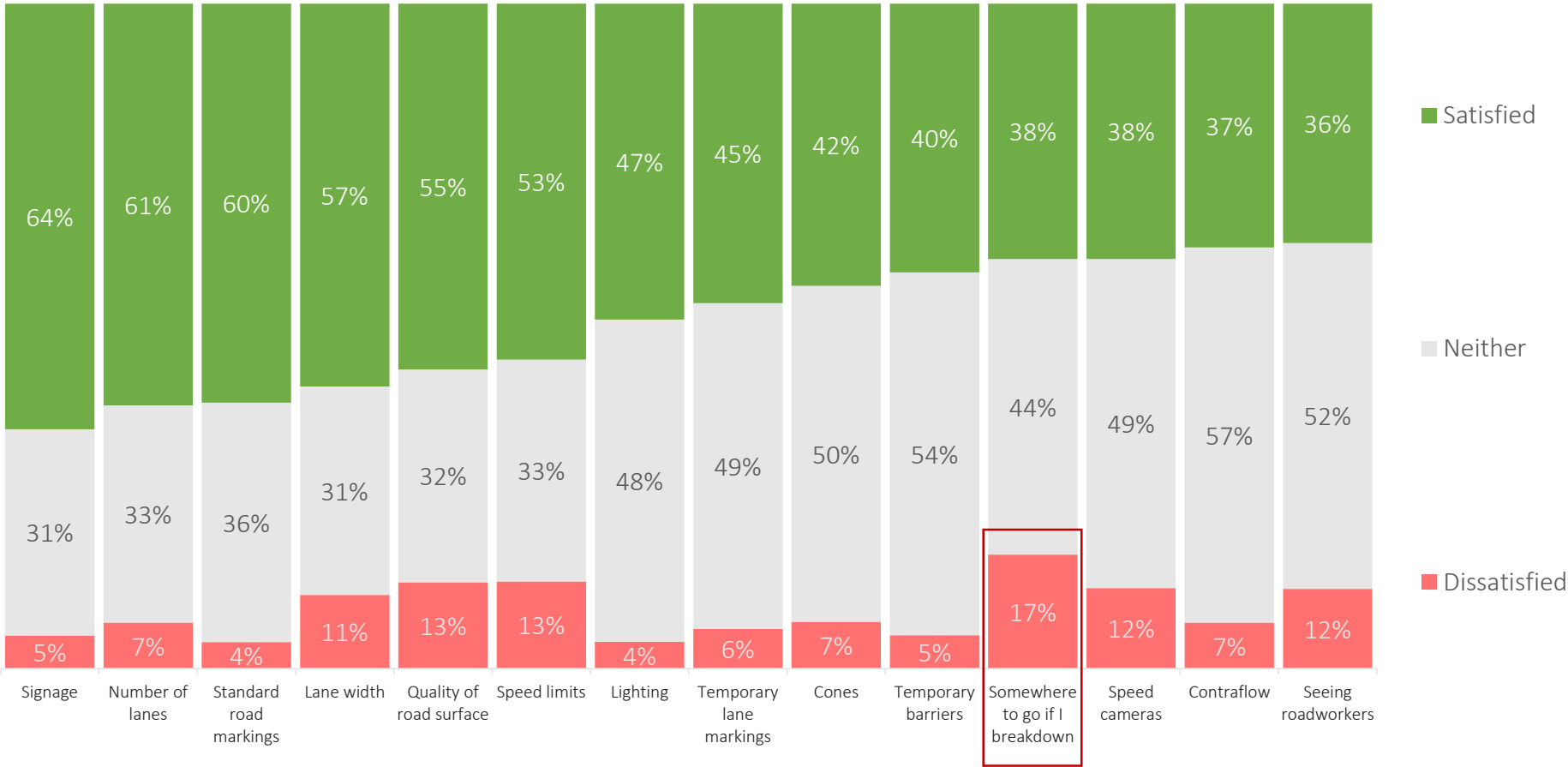
**Answering on behalf of their fleet drivers



Satisfaction with elements of the M4 [Drivers]

Most users are satisfied with the level of signage, number of lanes and standard road markings, however attention should be paid to areas for breakdown as this is an area of public concern, and are likely to be heightened by the upgrade

Based on all road users – Drivers



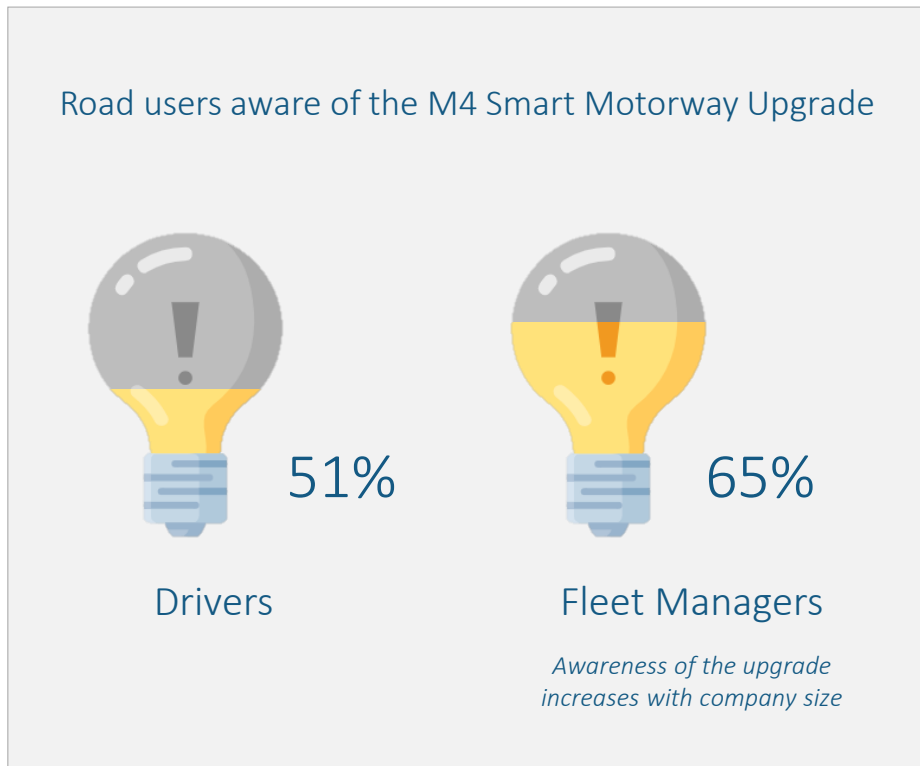
SECTION 3

Awareness and level of understanding

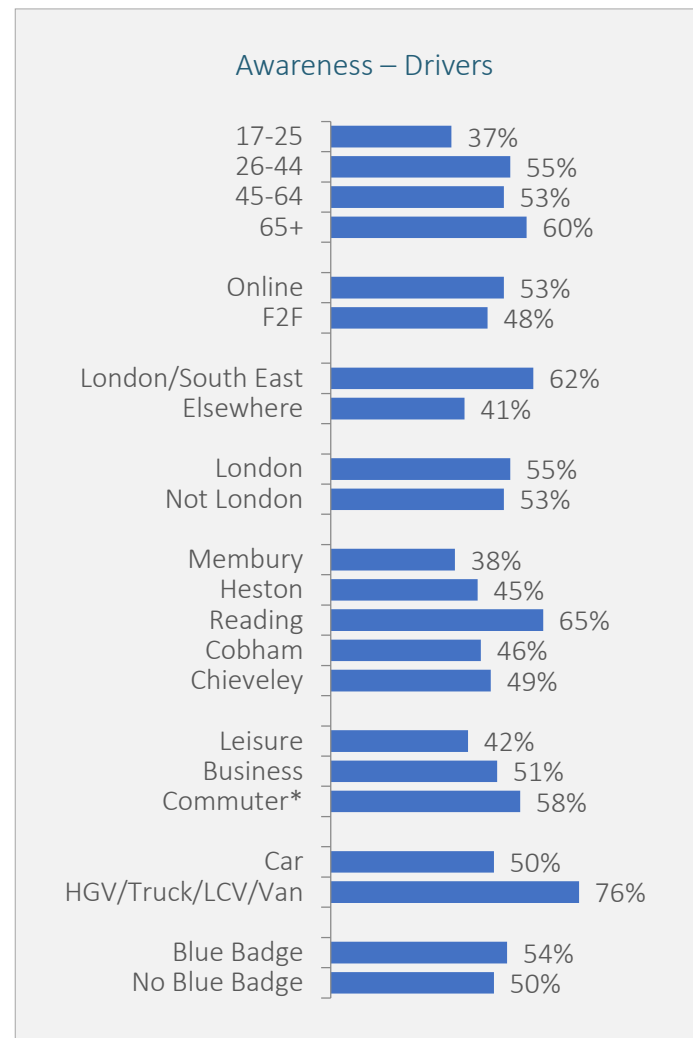
Awareness of M4 smart motorway upgrade and potential disruption

One in two are already aware of the upgrade. Awareness rises with age, and is highest among fleet managers, likely reflecting more touchpoints for this audience. Reading, where the works are currently underway, has higher levels of awareness

Based on all road users



*Those not aware of the works are more likely to be female, 17-25 and car drivers



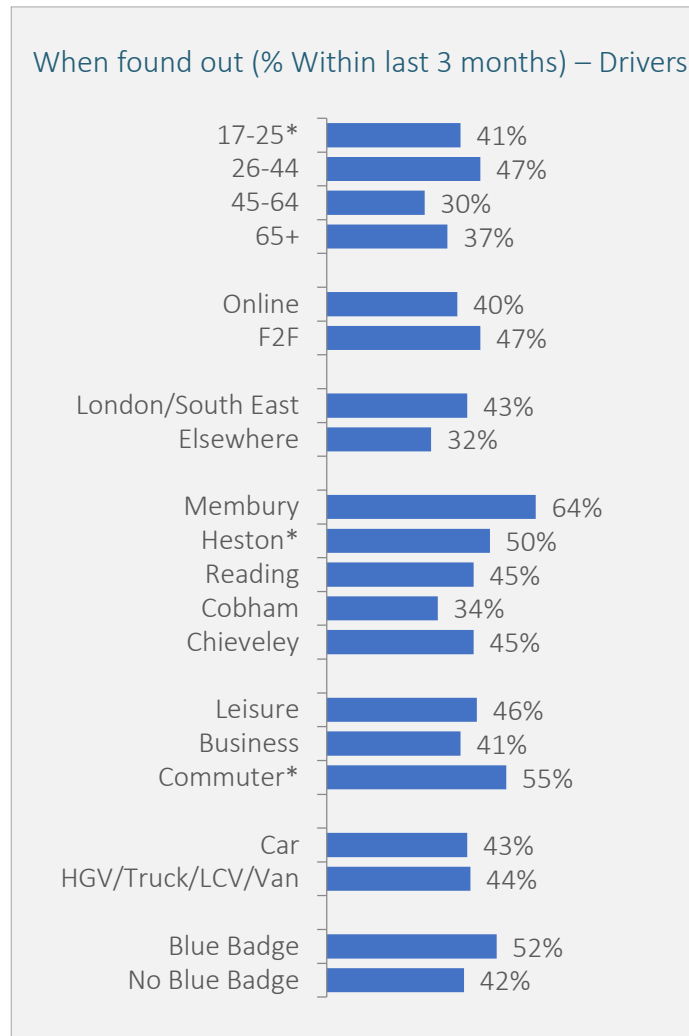
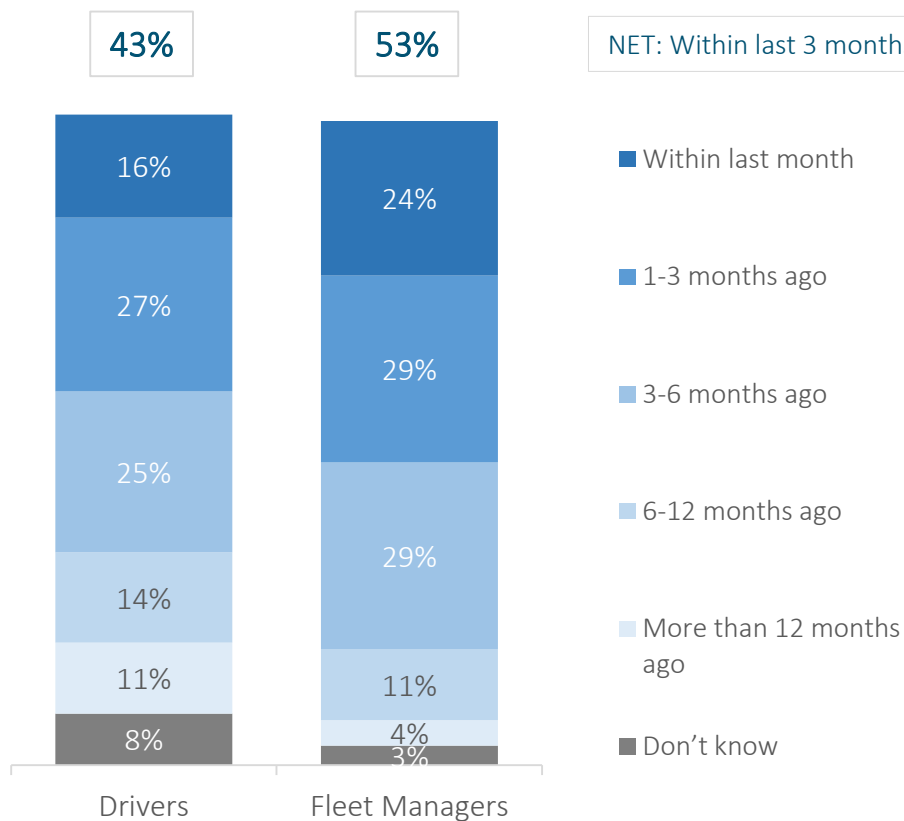
When found out about works

Four in ten drivers found out within the last three months, rising to over half of fleet managers

Based on all road users aware of upgrade



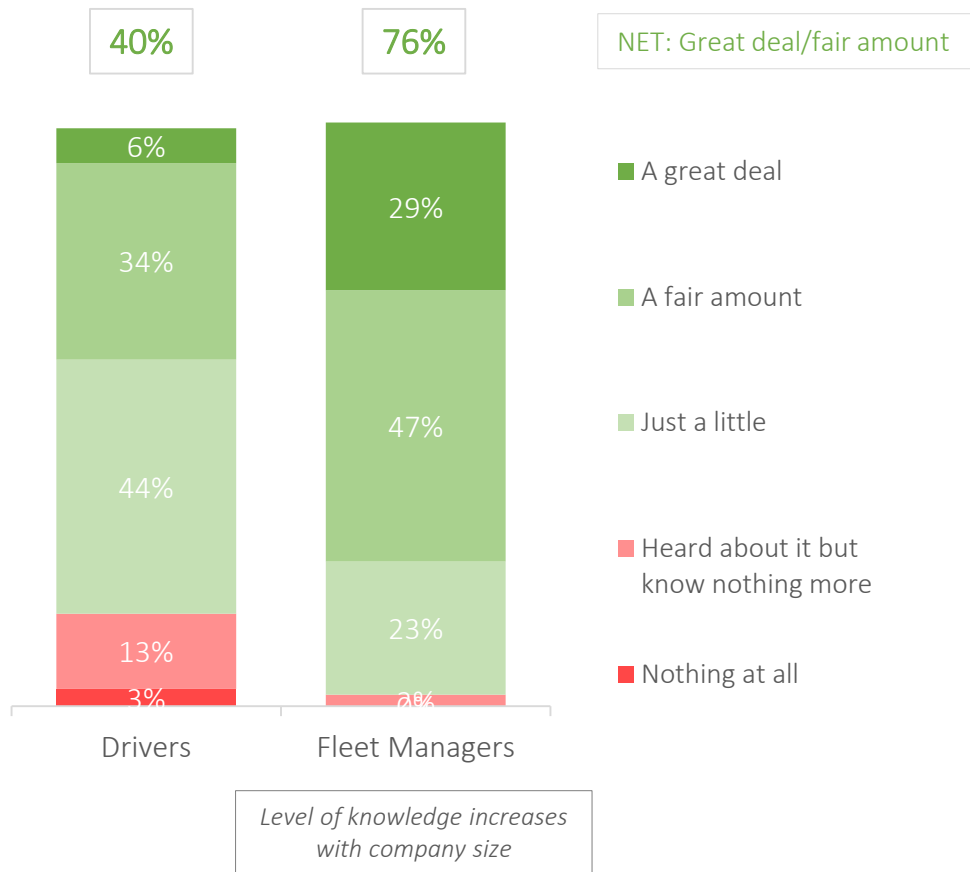
NET: Within last 3 months



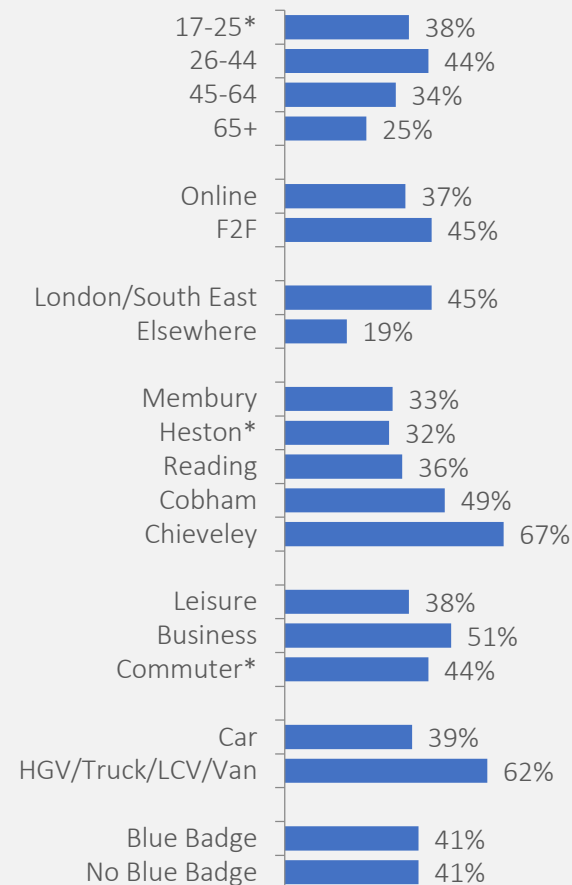
Level of knowledge about the upgrade

Two in five drivers claim to know a great deal or fair amount about the upgrade, rising to two in three HGV drivers and three quarters among fleet managers. Tailored comms should be strengthened moving forwards to ensure all road users are targeted efficiently with relevant information

Based on all road users aware of upgrade



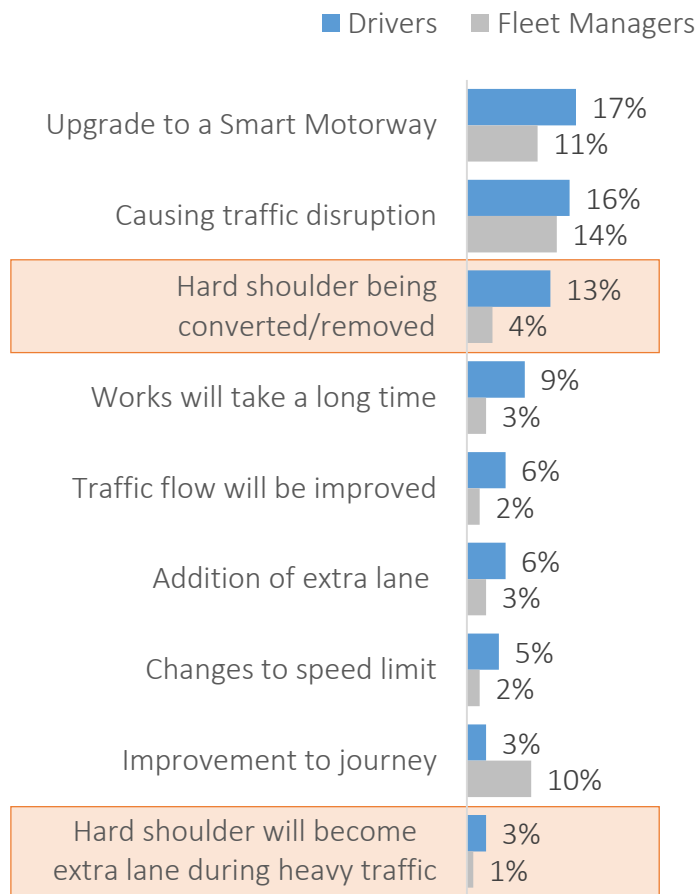
Knowledge (% great deal/fair amount) – Drivers



What road users know about the works so far [spontaneous – top mentions]

Specific knowledge focuses on the upgrade in general and the traffic disruption, length of time and removal of the hard shoulder. While minor, there is some confusion around the plans for the hard shoulder which should be clarified in future comms

Based on all road users aware of upgrade



“Hard shoulders converted into traffic lanes. Signs will direct traffic when they can use these lanes with the aim of reducing congestion. Variable speed limits will also apply”

Fleet Manager

“I know that the hard shoulder is being upgraded to a lane to be used at certain times of the day and that while the work is being carried out there is a 50mph speed restriction in place”

Driver

“That it was planned to improve future traffic flow. Disruptions to the motorway network and local road impact assessments”

Driver

“Extensive work in progress with a 50mph speed limit in force over most of the distance, and average speed monitoring cameras. Concrete central crash barriers are being constructed, gantries are being installed at intervals. The work will take around two years or more to complete”

Driver

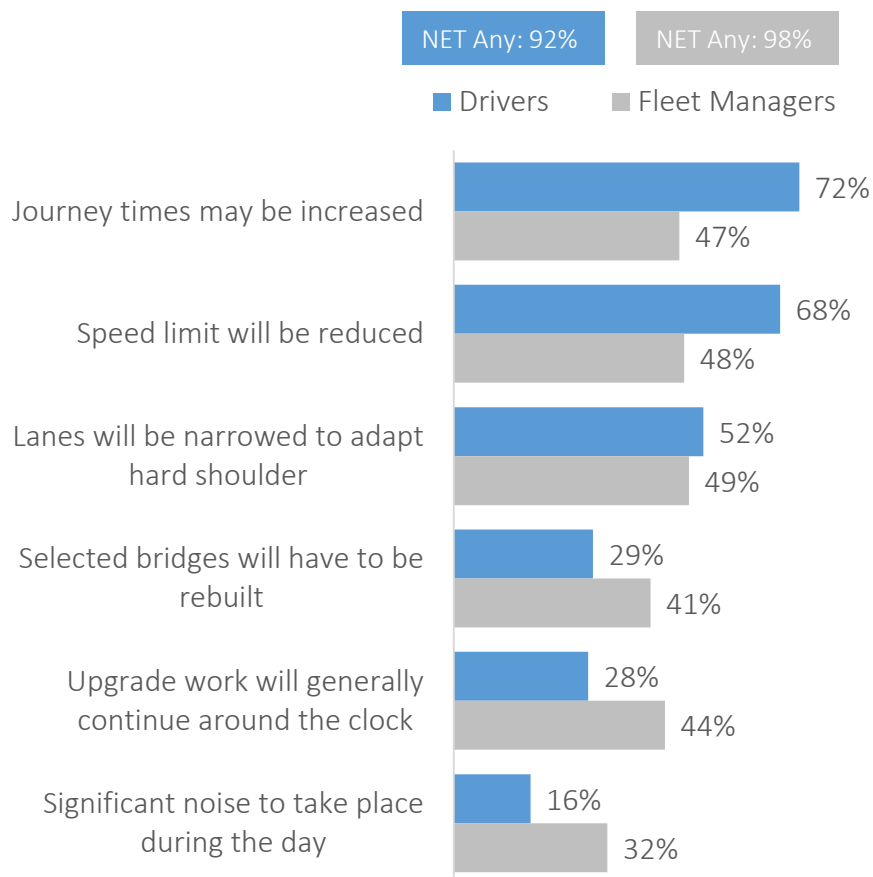
“Four lanes with the hard shoulder running in peak times, and intelligent speed system”

Fleet Manager

Understanding of implications of the works [prompted]

Fleet managers tend to have greater knowledge of the logistics of the works, whereas drivers are more focused on the impact on journey times and speed limits

Based on all road users aware of upgrade



“I know that there is a fair amount of disruption and that you **need to allow extra time for your journey, mainly due to the restricted speed limit**”

Driver

“The works will **affect my journey time** and I have to **plan ahead due to reduced speeds**”

Driver

“The work is taking place **mainly at night**”

Fleet Manager

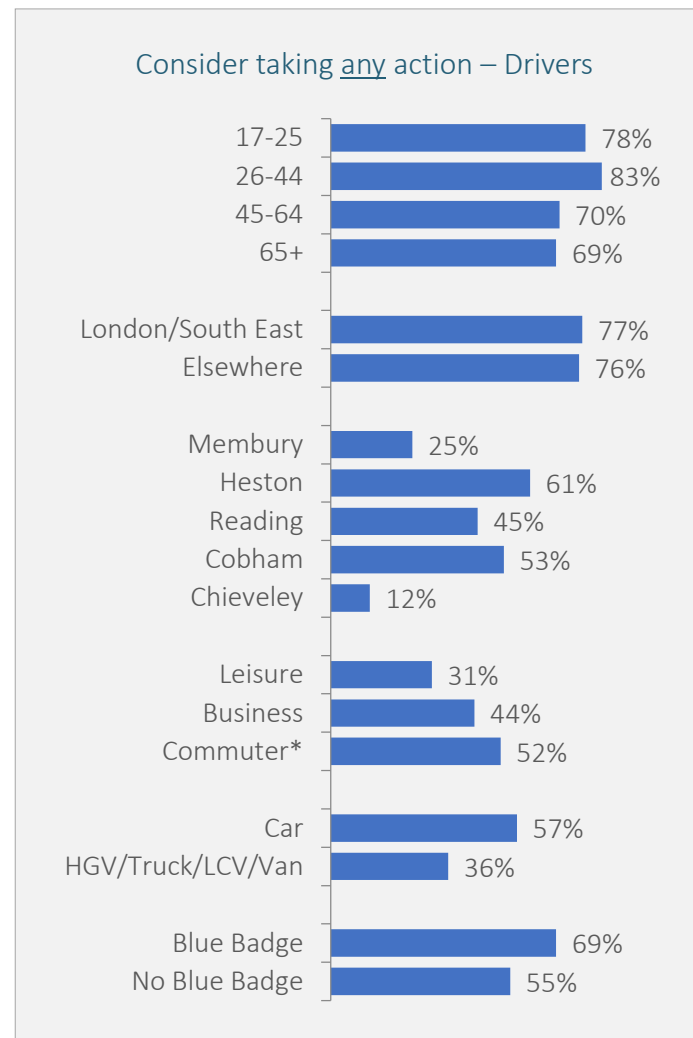
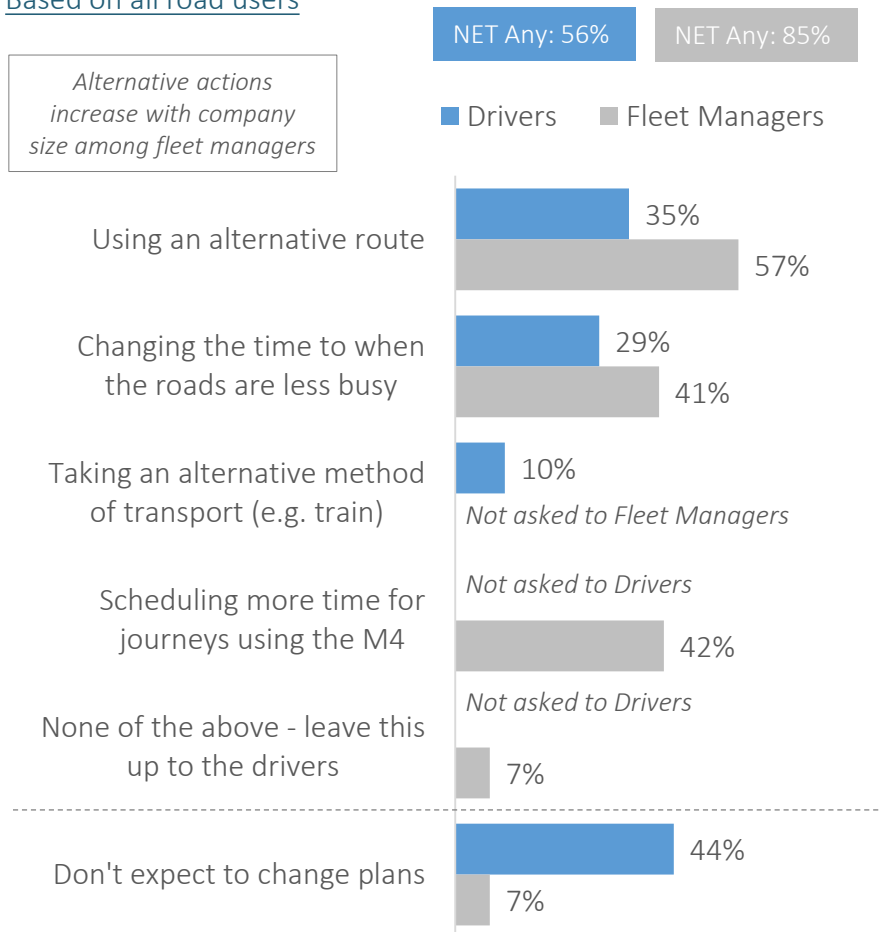
“**Bridges and exits will be modified** before the hard shoulder can be operated as an additional M4 lane”

Driver

Alternative actions considered during roadworks

One in two drivers claim they will consider doing something different during the roadworks, rising to almost nine in ten among fleet managers, who imagine the disruption will have a greater impact for their business. One in three drivers claim they will consider a different route away from the M4

Based on all road users



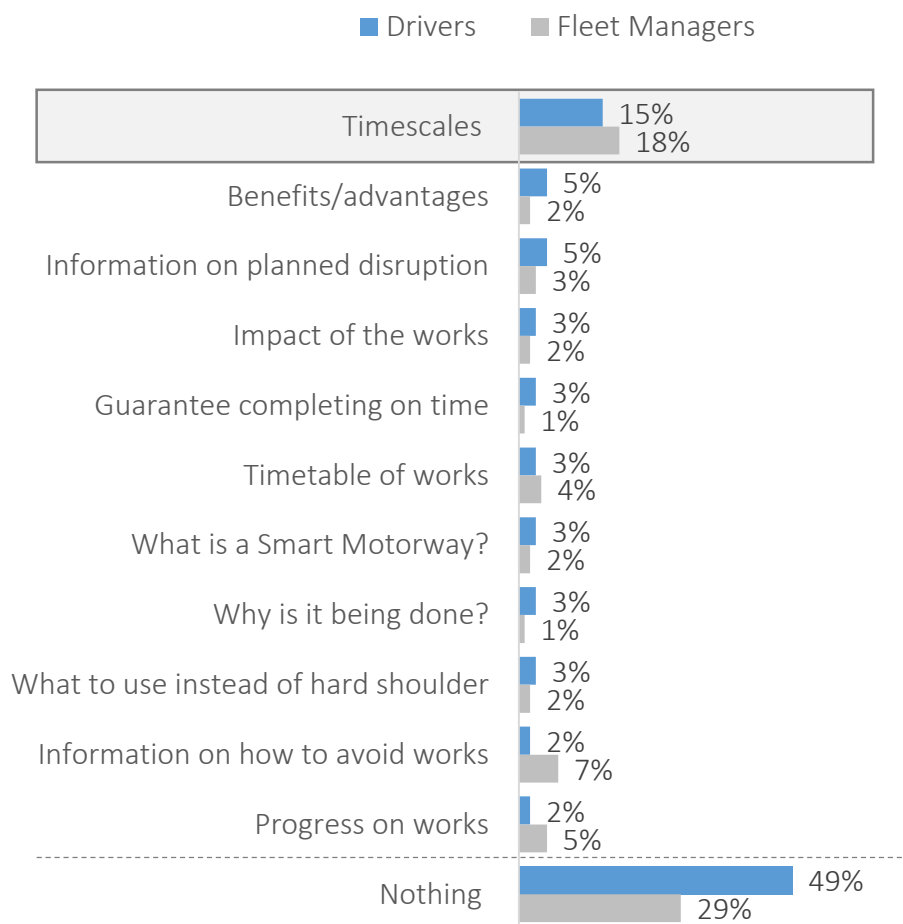
Q19. Which, if any, of the following actions might you consider taking during the roadworks? Base: Drivers (971) Fleet Managers (205)
 17-25 (59) 26-44 (213) 45-64 (159) 65+ (78) Online (509) F2F (462) London/South East (304) Elsewhere (205) Membury (119) Heston (49) Reading (86) Cobham (103) Chieveley (105) Leisure (295) Business (104) Commuter (31) Car (866) HGV/Truck/LCV/Van (63) Blue Badge (104) No Blue Badge (858)

*Low base size

What more would like to know about the works

Generally there is low engagement with the upgrade; future comms should elaborate on timescales of the works as this is the dominant information need for both groups. Fleet managers would like more information on alternative routes to avoid the works to aid journey planning

Based on all road users aware of upgrade



“When are the various sections having the most work done?

What's the benefit in terms of journey times and congestion?

Will it just encourage more traffic and so end up with same congestion in a few years (like the M25)?

Driver

“Frequency of use and times would be helpful before going on to the M4. Signage above the road needs to be clear and turned off if not in use”

Driver

“When it’s finished, delay times, alternate routes to avoid delays”

Fleet Manager

“Will the works be completed on time, ahead of schedule or behind schedule?”

Driver

“What will the safety impact be - it may reduce traffic waiting times, but will it really be safe?”

Driver

“A risk analysis of what happens to vehicles that break down on a stretch of motorway with no hard shoulder”

Fleet Manager

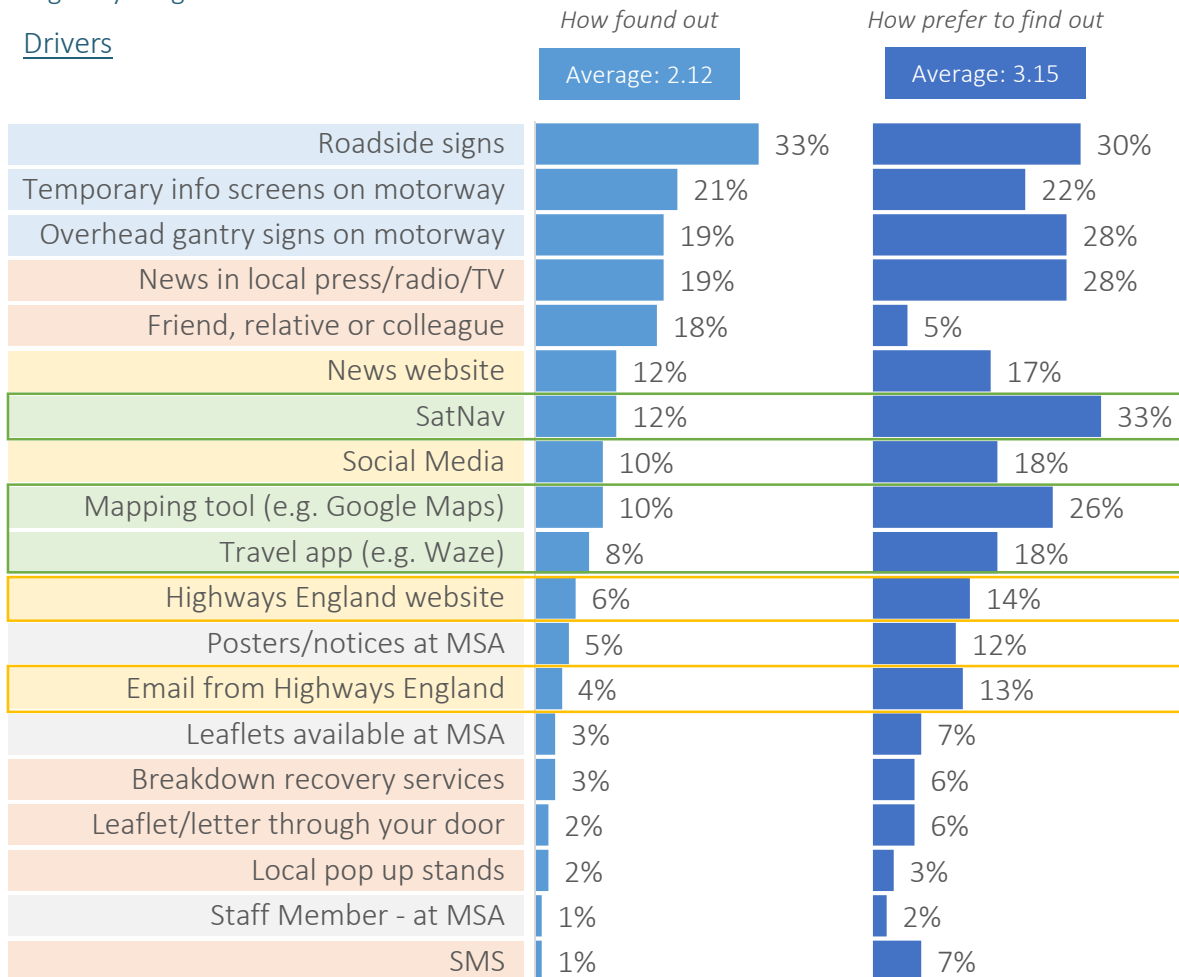
SECTION 4

Information channels

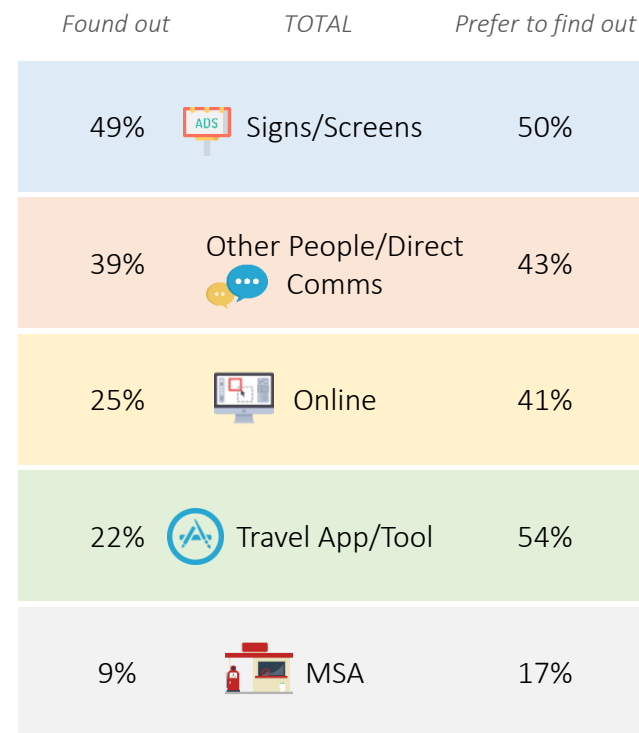
How found out/preferred way to find out about upgrade [Drivers]

Most drivers found out through signs/screens on the motorway, by and large the way in which most want to find out. However, road users are open to comms through multiple channels, and there is an opportunity to make messages more prominent through SatNav or Mapping Tools, as well as the Highways England website and direct emails

Drivers



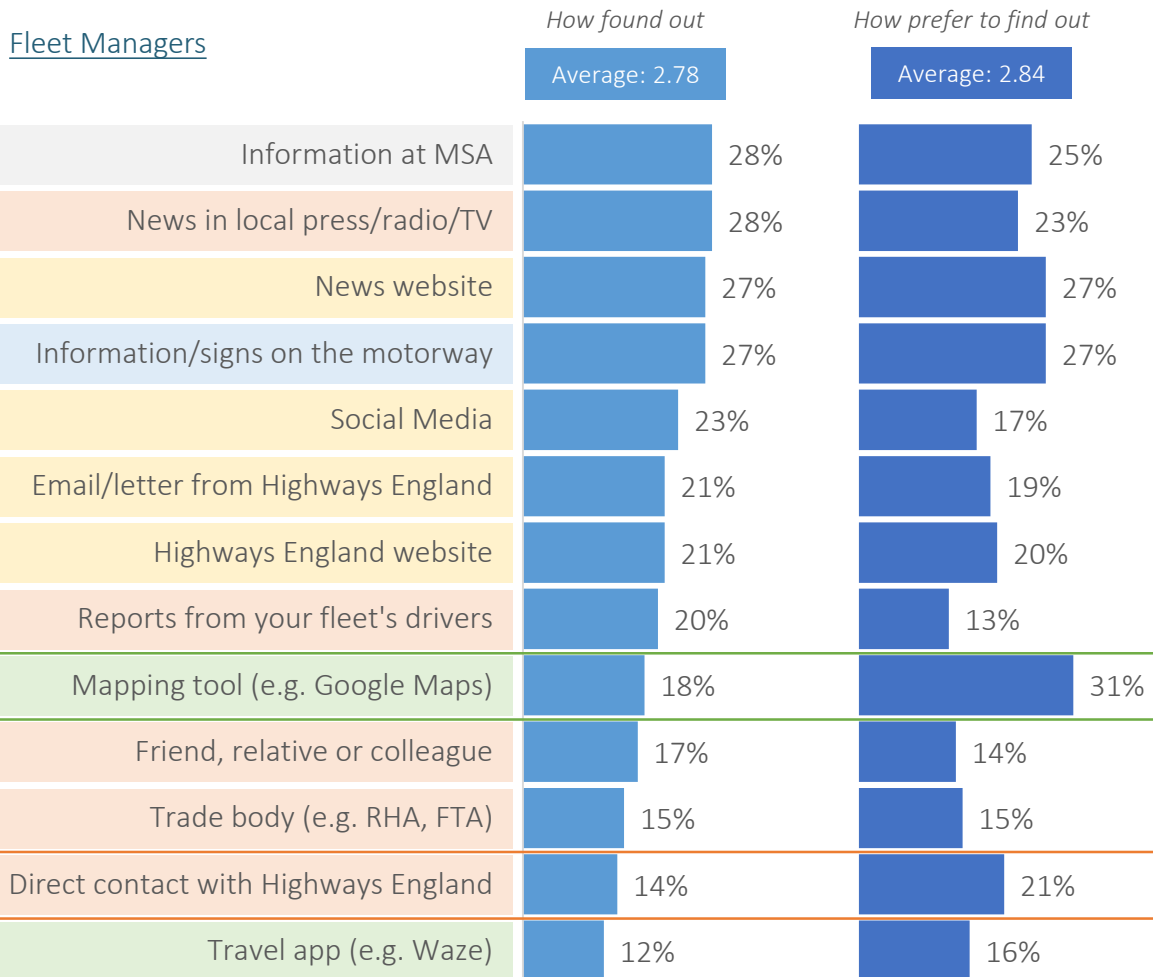
Please note, code frame not comparable with fleet manager survey



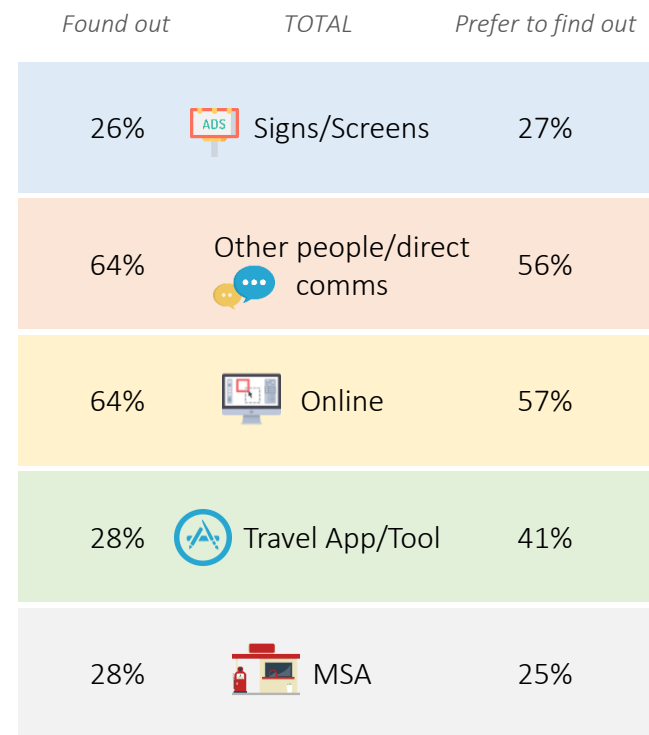
Multi Code question so code frame does not sum to 100%

How found out/preferred way to find out about upgrade [Fleet Managers]

Information channels are mostly in line with how fleet managers would prefer to find out about the upgrade, however there is opportunity to increase awareness through Mapping Tools and direct communications from Highways England



Please note, code frame not exactly comparable with driver survey, but fleet managers are generally finding out in a greater variety of ways



Those in larger companies have found out in more ways on average

Multi Code question so code frame does not sum to 100%

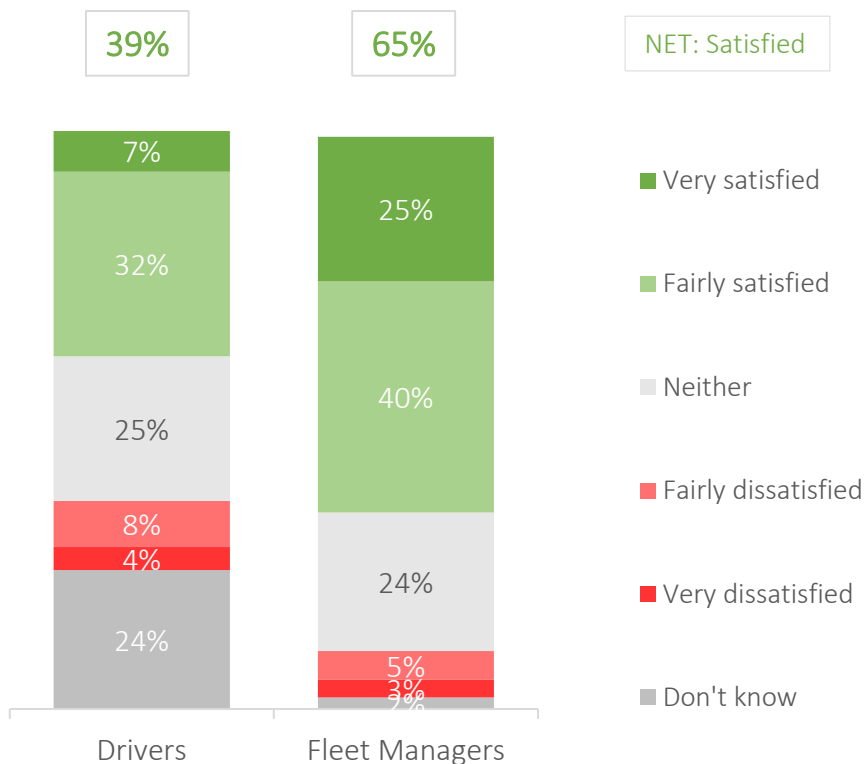
Satisfaction with information

Two in five drivers are satisfied with the information currently being provided on the upgrade. Satisfaction rises among fleet managers, while drivers tend to be the least satisfied - along with commuters and those in London/South East - suggesting personalised/targeted comms would be beneficial for these groups

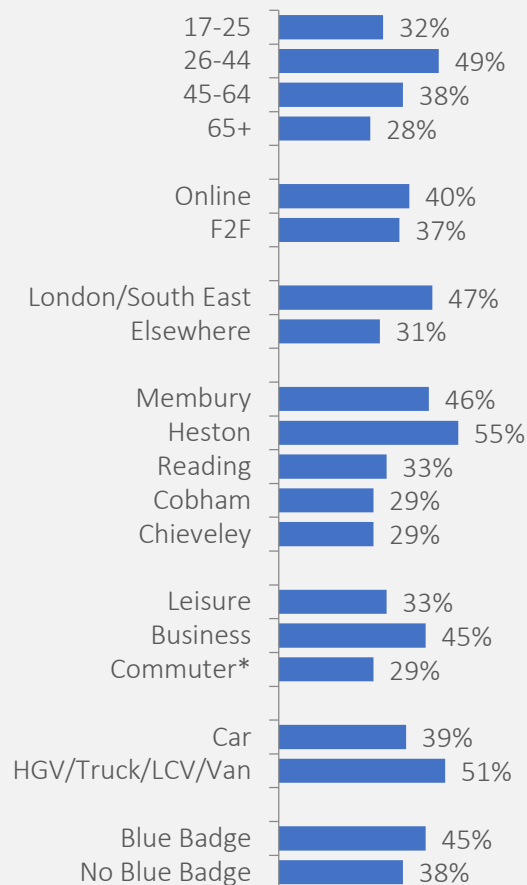
Based on all road users



NET: Satisfied



Satisfaction with information – Drivers



Satisfaction with information is lower outside of London/South East, reflecting lower levels of awareness among this audience

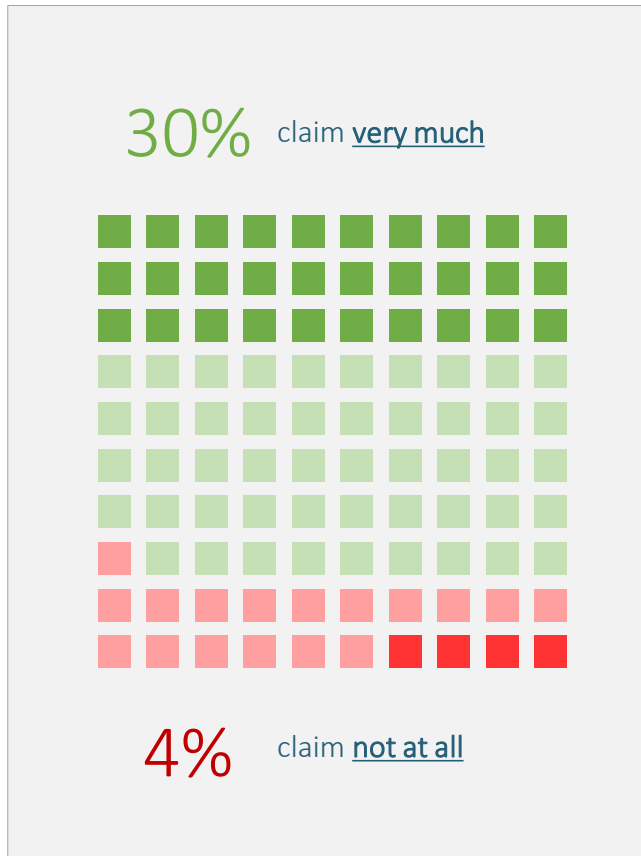
Q21. Overall how satisfied or dissatisfied are you with the information currently being provided about the M4 Smart Motorway Upgrade? Base: Drivers (971) Fleet Managers (205) 17-25 (59) 26-44 (213) 45-64 (159) 65+ (78) Online (509) F2F (462) London/South East (304) Elsewhere (205) Membury (119) Heston (49) Reading (86) Cobham (103) Chieveley (105) Leisure (295) Business (104) Commuter (31) Car (866) HGV/Truck/LCV/Van (63) Blue Badge (104) No Blue Badge (858)

*Low base size

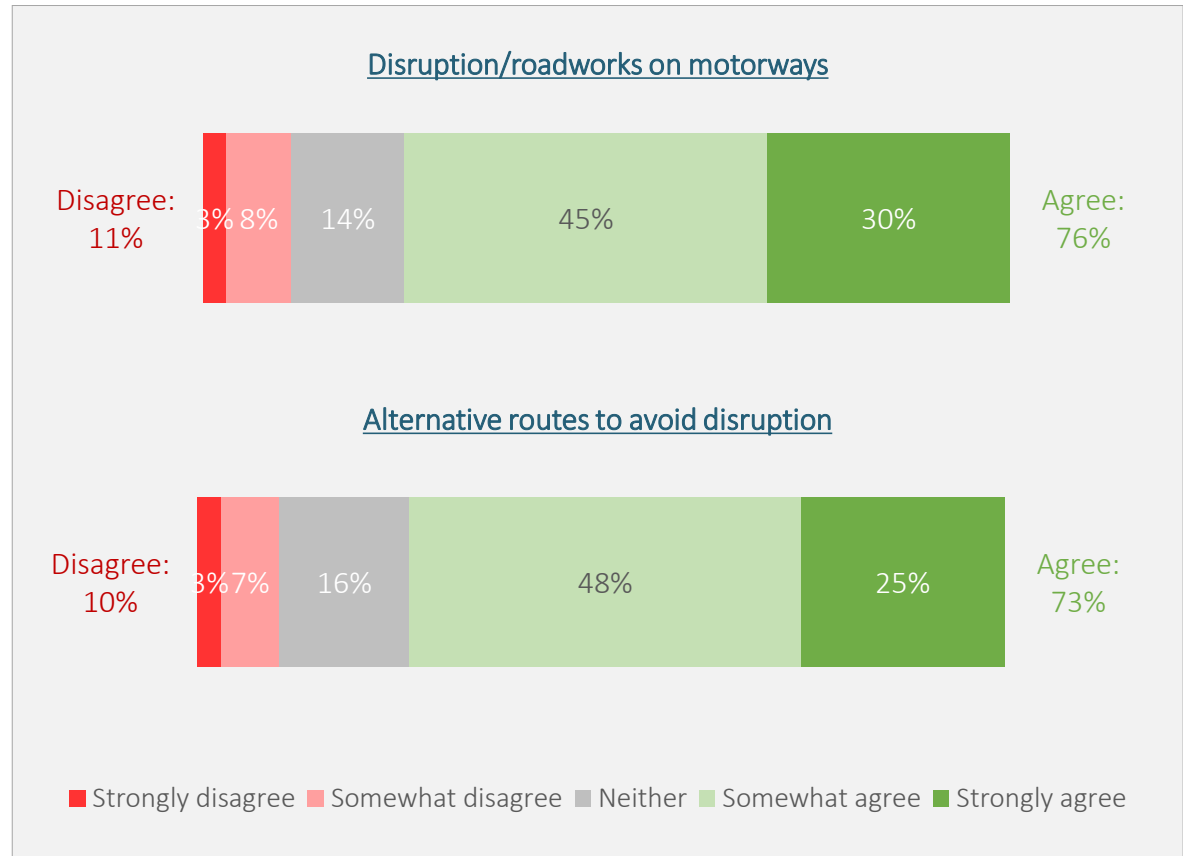
M4 currently meeting needs/satisfaction with information [Fleet Managers]

One in three fleet managers claim the M4 between junctions 3 and 12 meet their organisation's needs, with three in four agreeing that they are currently getting the required information on roadworks and alternative routes to avoid disruption

Do junctions 3-12 meet company's needs



Currently getting information needed for...



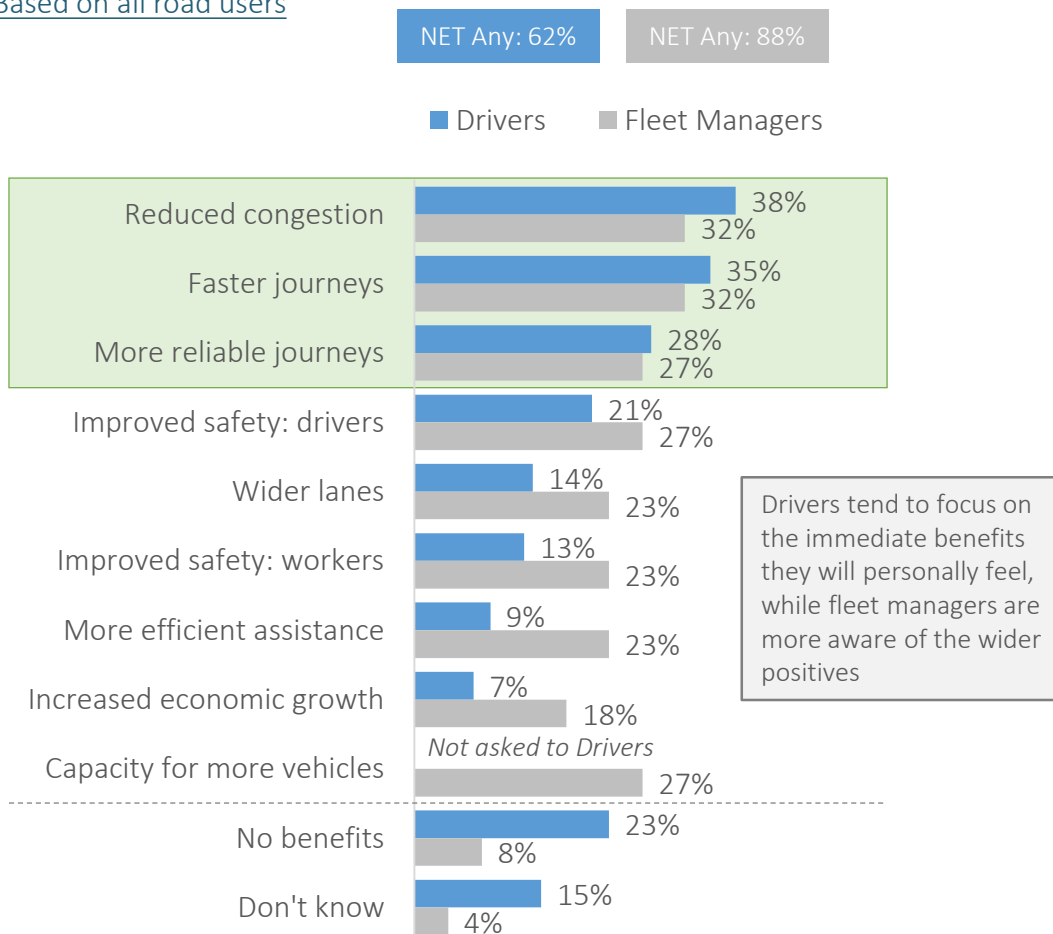
SECTION 6

Perceived benefits and overall level of support

Benefits of the upgrade

The benefits of the upgrade are being successfully communicated with almost two in three drivers claiming the work will benefit them personally. Fleet managers imagine a wider variety of improvements beyond congestion and reliability, such as more efficient assistance and improved safety of both drivers and workers

Based on all road users



“That the motorway is being upgraded to a smart motorway with **the aim of reducing congestion and improving journey times**”

Driver

“The motorway is being upgraded **to allow all lane running** and have a smart, variable speed limit to increase capacity and **improve traffic flow at peak times**”

Driver

“Highways England is **putting in various signs, road markings etc, to facilitate safe driving** on the M4 between Junctions 3 and 12 inclusive”

Fleet Manager

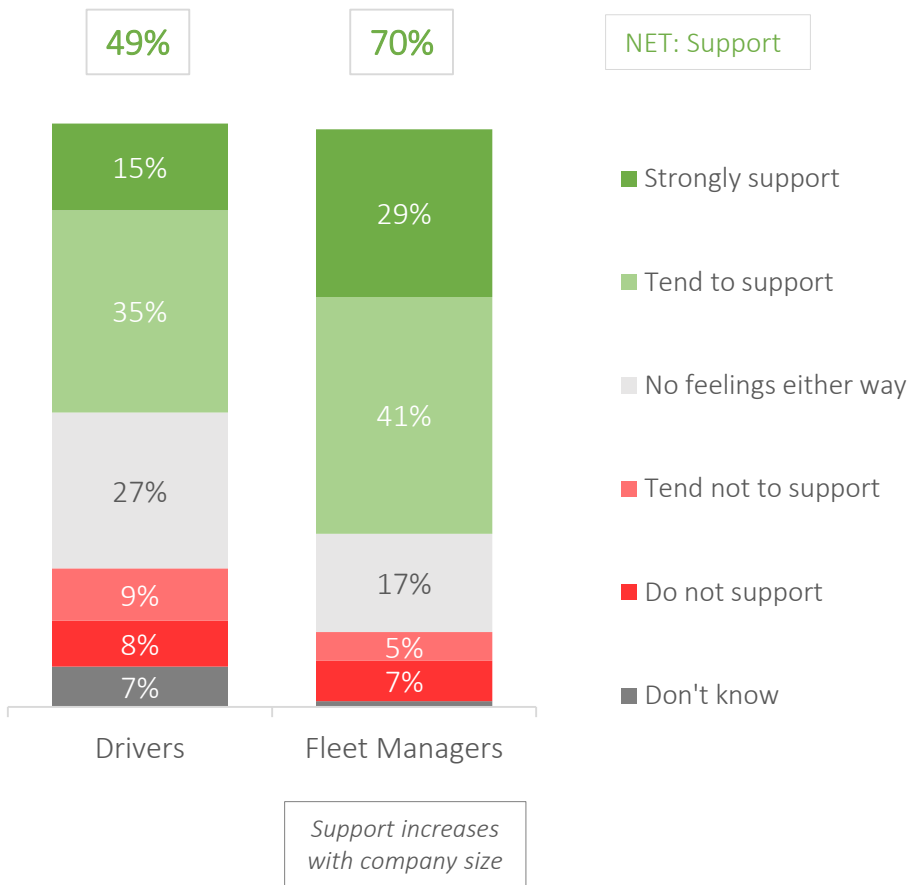
Support for the M4 Smart Motorway Upgrade

One in two support the M4 Smart Motorway Upgrade, with low levels of opposition. Support is highest among fleet managers, while drivers are more indifferent

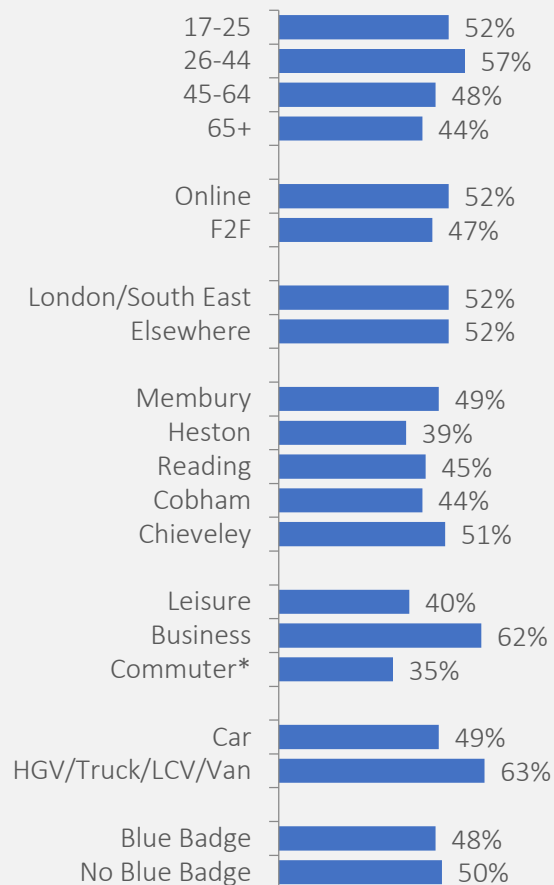
Based on all road users



NET: Support



Support for upgrade – Drivers



*Low base size

Why support the upgrade [Drivers]

51% support the works

Drivers' reasons for supporting the upgrade focus on reducing congestion and improvement of safety through reduced speeds

Reduced congestion

"The new roads will ease congestion and make the whole journey quicker and more comfortable for all drivers"

"We have smart motorways near us on the M62 and they have helped decrease motorway congestion"

"If it leads to less congestion and faster moving traffic as happened on the M1 upgrade then it is a good thing"

Adjustable speed limits enabling smoother traffic flow

"Smart motorways rely on electronic information to provide road and speed limit messages rather than humans looking at the reality on screens"

"If people follow the speed on the adjustable speed limits, the traffic should flow better"

"I find the regulated speeds on smart motorways make the traffic move more smoothly"

Improved safety

"Anything that reduces congestion, improves journey times and road safety is a good idea"

"Should improve safety and travel times"

"Any improvement involving easing traffic flow and safety is welcome"

"Anything which improves safety and reduces congestion, speeding up journey time can only be a good thing"

Why oppose the upgrade [Drivers]

17% oppose the works

Drivers are concerned that the upgrade will cause increased congestion, in both the short and long term; they are also worried that the loss of a hard shoulder could be dangerous, and about the disruption that the upgrade process could cause to their journeys

Worsening traffic

“My experience of smart motorways is that **they cause congestion even more than they reduce it**”

“Concerned it will just lead to **more traffic to fill the extra road**”

“It seems that, by the time the improvements are finished, **traffic levels just increase to fill the newly available road space and the traveller is back to square one**”

Danger of losing hard shoulder

“Have **serious misgivings regarding the loss of the hard shoulder** from the safety perspective of broken down road users and rescue personnel”

“**I don't think the hard shoulder should be used as a lane**, should only be for emergencies e.g. break downs and emergency services!”

“**Taking the hard shoulder away is dangerous** and causes more inconvenience with accidents and break downs”

“Because I am disabled and **if I broke down without reaching a designated lay by, I wouldn't be able to get out of my car safely**. It is also going to cost a ridiculous amount of money”

Disruption and lack of perceived benefits

“**Causing lots of disruption** without seeing or understanding immediate benefit”

“**I don't understand the benefits compared to the disruption** and the danger of removing the hard shoulder”

“**Years of disruption for questionable benefits** at enormous expense doesn't sit comfortably with me”

“The M3 underwent many years of upgrading work causing **considerable disruption with no tangible benefit** of it being a smart motorway, it's made no difference so far”

Why support the upgrade [Fleet Managers]

70% support the works

The reasons for fleet managers supporting the upgrade focus on traffic and journey time reduction, as well as improved safety

Less traffic

“To monitor traffic and **help ease congestion**”

“**Needed to control congestion** and at peak times”

“Smart motorways as a general rule, once they are up and running, are good. **Don't get as much congestion**”

“Life will be a lot easier, **less congestion and more streamlining of traffic**”

Improved safety

“Anything to reduce congestion and **improve safety is good**”

“Reduced speed and **improved safety**”

“It will promote economic growth and **improve safety**”

“For the **safety aspect**”

Reduced journey times

“**Improved journey times** and less congestion”

“To **reduce journey times** and congestion”

“It could **improve travel time**”

“It **improves travel times**”

Why oppose the upgrade [Fleet Managers]*

12% oppose the works

Hauliers who oppose the upgrade are concerned that there is little perceived benefit compared to the cost of the work, not being able to use the hard shoulder during times of crisis, and accessibility for emergency services

Little perceived benefit to justify disruption

“I'm not entirely sure that the upgrades are going to make a big enough difference to justify the disruption”

“It's going to take too long, causing disruption for years for very little benefit”

“Not worth all the problems it will create over the next few years”

Loss of hard shoulder and impact on safety

“I think it's dangerous when you have a broken down vehicle, you have nowhere to stand”

“Do not like the idea of taking away the hard shoulder, it can be a life saver”

“I think that the hard shoulders are necessary in case of breakdowns. I assume that testing has been done, but it seems very dangerous and a cheapskate way of trying to increase capacity”

Problems for emergency services

“It will create a new set of dangerous conditions and will lead to the obstruction of emergency vehicles”

“No hard shoulder for emergency services in an accident”

“Because smart motorways are dangerous for drivers and emergency vehicles”

During the qualitative stage, Fleet Managers/Drivers also mentioned concerns that they do not trust other drivers to use the smart motorway safely

SECTION 7

Summary of findings

Summary of findings [I]

Awareness

Summary: Communication of the M4 smart motorway upgrade has been successful, particularly among those likely to feel the impact more regularly (i.e. surrounding area and fleet managers), and where the works began (i.e. Reading)

Recommendation: Target those travelling from further away or for leisure purposes with more tailored comms with relevant information

Knowledge

Summary: Knowledge of the works could be strengthened, as could satisfaction with information currently available, especially among those from further afield

Recommendation: Consider publishing specifics about timescales as this is a key information need, be more explicit with plans for the hard shoulder to avoid confusion, and address safety concerns with emergency refuge areas

Understanding

Summary: Drivers currently focus on the more functional implications (e.g. journey time and speed limits), while fleet managers tend to be more aware of the wider impact (e.g. the work will continue around-the-clock)

Recommendation: Increase understanding of wider implications such as bridge closures and noise reduction measures, and focus on secondary benefits such as wider lanes and more efficient assistance

Information channels

Summary: Road users are open to lots of channels, and are currently finding out in the ways that they would like to

Recommendation: Make messaging more prominent through SatNav or Mapping Tools, as well as the Highways England website and direct email

Summary of findings [II]

Behaviour change

Summary: Half of drivers do not expect to change their plans during the roadworks

Recommendation: Consider a targeted campaign highlighting viable alternative routes, either online or on motorway signs, as this will help fleet managers in particular plan their journeys

Overall support

Summary: One in two support the upgrade, rising to seven in ten among fleet managers. Those who oppose do so primarily due to concerns that the hard shoulder will no longer be available for breakdowns or emergencies

Recommendation: Be as explicit as possible with information on emergency breakdown areas and the plans for the hard shoulder following successful completion of the upgrade

Blue Badge holders

Summary: Blue Badge holders are slightly more aware of the upgrade and are more satisfied with the available information than other road users, suggesting the current campaign is landing well with this audience

Recommendation: Consider making more of the added safety a Smart Motorway will bring, to ensure drivers with disabilities understand their more vulnerable needs are met