



Road users' priorities for improvement: heavy goods vehicle drivers

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Anthony Smith

Foreword

Transport Focus is the independent consumer watchdog representing the interests of those who use England's motorways and major 'A' roads (the Strategic Road Network or SRN), rail passengers throughout Great Britain, and bus, coach and tram users across England outside London. We work to make a difference for transport users.

We are guided by three principles. First, we represent the interests of consumers of transport services, irrespective of the mode they choose to use. Second, we are evidence-based; insight gathered from research informs our views and any improvements we advocate. Third, we aim to be useful to those who provide and fund services for those we represent.

Transport Focus began representing road users' interests on 30 March 2015 and at that time we published research which explored their needs and experiences when using the network.¹ This qualitative research was made up of discussion groups with a range of motorised and non-motorised users. The groups were used to examine perceptions of the SRN as well as focusing on the experience of using it. A core aspect of this research was to also explore attitudes towards specific elements of the network such as safety, journey planning, congestion and disruption. We found that road users will often focus on the negative experiences of one journey rather than typical journeys as a whole.

Highways England currently carries out the National Road User Satisfaction Survey (NRUSS). A key role for Transport Focus is to develop a new survey to measure satisfaction among users of the SRN. This will replace the NRUSS in due course. Development work is progressing well with pilot work taking



place in Spring 2016 and launch of the new survey expected in Autumn 2016.

Gauging satisfaction is important; however, Transport Focus recognises that it is important to also understand road users' priorities for improvement to the SRN. We have carried out similar studies among rail and bus passengers. We therefore built on our road user needs and experiences research to compile a list of 17 potential improvements and asked nearly 250 HGV drivers to think specifically about their last trip on the SRN. We used a trade-off methodology known as Maximum Difference Scaling ('MaxDiff') to produce

the rankings and index among those 17 potential improvements.

For all groups of road users, we took great care to ensure that those taking part in the research were answering in relation to the SRN, rather than a local road. Most SRN journeys are short: for HGV drivers, around half are 20 miles. We also looked at priorities among users of three different types of roads within the Highways England network: motorways, dual carriageway 'A' roads and single carriageway 'A' roads.

We published the priorities for improvement identified by car and van drivers and motorcycle riders separately². This report covers HGV drivers' views about what they would like to see improved on the SRN.

¹ <http://www.transportfocus.org.uk/research/publications/road-user-needs-and-experiences-full-report>

The aspect of the SRN that HGV drivers most wish to see improved is 'quality of road surfaces'. This is also the top priority for both car and van drivers, as well as for motorcyclists. For all groups of road users, concerns about road surfaces were not confined to potholes; drivers want surfaces that produce less noise, that are safe even in poor weather and surfaces that give a more comfortable ride.

The next priorities for improvement among HGV drivers are 'better management of unplanned delays such as accidents and breakdowns' (ranked second) and 'better management of roadworks' (ranked third). This differs from both car and van drivers and motorcyclists who ranked 'safer design and upkeep of roads' (ranked second for car and van drivers and third for motorcyclists) and 'better behaved drivers' (ranked third for car and van drivers and second for motorcyclists) within their top three priorities. The variation in results shows that the impact of delays, both planned and unplanned, is of even greater importance to HGV drivers, which makes sense given their purpose of journey (work schedules and fixed delivery slots) on the SRN. The focus for HGV drivers then shifts to factors which affect road safety with 'safer design and upkeep of roads' ranked fourth and 'better behaved drivers' ranked fifth.

As well as understanding which aspects of the SRN HGV drivers regard as a greater priority for improvement than others, the index score allows us to see how much more important, or less important, one factor is compared with an average priority for improvement of 100. This means from the index score we can see that not only is 'improved quality of road surfaces' the top priority for improvement to

the SRN, it is also over three times as important as the average priority for HGV drivers. This compares with 'improved quality of road surfaces' being almost five times as important as the average priority for car/van users and over six times as important for motorcyclists.

I hope this insight into what HGV drivers on the SRN most want to see improved will be helpful to Highways England, government and others in focusing investment and management attention. Visit our website www.transportfocus.org.uk to keep up to date with our plans. On there you can read about our progress in **Road User Voice**, our monthly e-newsletter. You can also sign up to receive it by email each month.



Anthony Smith
Chief Executive
Transport Focus

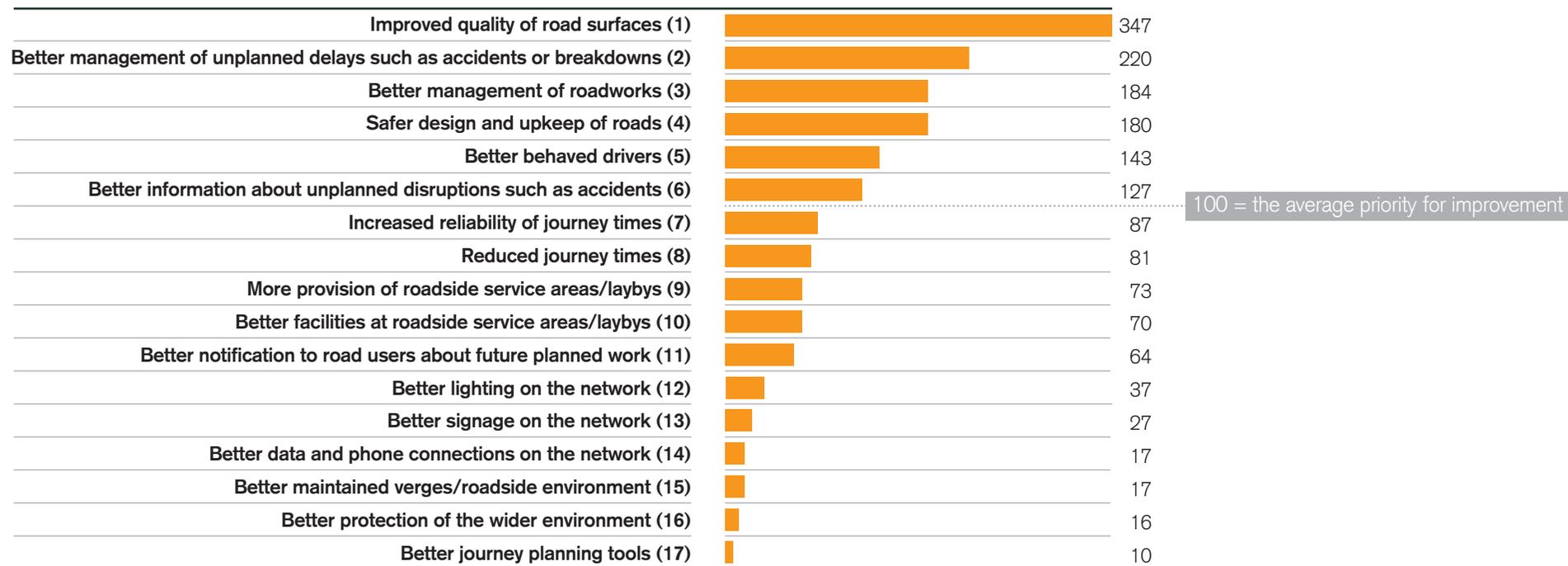
Technical note:

Due to rounding, figures may not always add up to 100 per cent.

² <http://www.transportfocus.org.uk/research/publications/road-users-priorities-for-improvement-car-and-van-drivers-and-motorcyclists>

Priorities for improvement to England's Strategic Road Network (SRN)

HGV drivers



The priorities are shown as an index averaged on 100. So, for example 150 = 50% more important than average, 300 = three times as important as average, 50 = half as important as average.

Base: All England HGV SRN users, 241

Top improvements for the Strategic Road Network

HGV DRIVERS Priority one

Improved quality of road surfaces

"Road repairs needed urgently."

Male, 60-64, East

"Just better road surfaces."

Female, 25-34, Midlands

"Invest more in improving road surfaces."

Male, 45-54, M25

"Better and more frequent road maintenance to minimise disruption caused by whole lengths of trunk roads subject to roadworks."

Male, 50-59, East

"Improve some slow lanes on motorways, some are grooved or sunken."

Male, 18-24, Midlands

HGV DRIVERS Priority two

Better management of unplanned delays

"Not overreacting when shutting down lanes or motorways."

Male, 25-34, North West

"Clear accident hotspots more quickly."

Male, 55-59, East

"Ensure that the information signs give accurate information, remember to turn them off when the incident is cleared and do not turn them on for no reason."

Male, 60-64, North East

"Stop closing lanes on motorways after incidents for silly reasons when it could all be cleared away quickly and reopened."

Male, 45-54, South West

HGV DRIVERS Priority three

Better management of roadworks

"Better planning of roadworks – keep traffic flowing and reduction of lane closures when no works are being done."

Male, 60-64, North West

"Don't carry out roadworks on all alternative routes at the same time."

Male, 45-54, Midlands

"Avoid starting roadworks until after peak rush hour traffic periods, especially on Thursday and Friday evenings."

Male, 60-64, Midlands

"Do more work during less busy times."

Male, 45-54, M25

HGV drivers' priorities for improvement to the SRN

by road type

	TOTAL HGV		Motorway		Single carriageway 'A' road		Dual carriageway 'A' road	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Improved quality of road surfaces	1	347	1	338	1	313	1	395
Better management of unplanned delays such as accidents or breakdowns	2	220	2	228	2	245	2	185
Better management of roadworks	3	184	3	220	4	184	4	146
Safer design and upkeep of roads	4	180	4	158	3	197	3	183
Better behaved drivers	5	143	6	129	5	168	5	130
Better information about unplanned disruptions such as accidents	6	127	5	134	6	132	6	116
Increased reliability of journey times	7	87	7	97	10	67	7	97
Reduced journey times	8	81	9	78	9	72	8	93
More provision of roadside service areas/laybys	9	73	10	51	8	82	9	84
Better facilities at roadside service areas/laybys	10	70	12	40	7	89	10	82
Better notification to road users about future planned work	11	64	8	82	11	47	11	65
Better lighting on the network	12	37	11	47	12	39	13	26
Better signage on the network	13	27	13	37	13	20	14	24
Better data and phone connections on the network	14	17	16	14	17	6	12	31
Better maintained verges/roadside environment	15	17	14	19	15	16	17	14
Better protection of the wider environment	16	16	15	17	14	17	16	14
Better journey planning tools	17	10	17	11	16	7	15	14

The top two priorities for HGV drivers are the same whether using motorways or 'A' roads. 'Improved quality of road surfaces' is ranked first and 'better management of unplanned delays such as accidents or breakdowns' is second. 'Better management of roadworks' is ranked as the third most important priority on the motorway, while for single carriageway and dual carriageway 'A' roads 'safer design and upkeep of roads' is third.

Base: All England HGV SRN users, 241

HGV drivers' priorities for improvement to the SRN by annual mileage

	TOTAL HGV		Annual mileage 50,000 miles and under		Annual mileage over 50,000	
	Rank	Index	Rank	Index	Rank	Index
Improved quality of road surfaces	1	347	1	350	1	345
Better management of unplanned delays such as accidents or breakdowns	2	220	2	204	2	235
Better management of roadworks	3	184	4	140	3	224
Safer design and upkeep of roads	4	180	3	195	4	166
Better behaved drivers	5	143	6	128	5	157
Better information about unplanned disruptions such as accidents	6	127	5	132	6	123
Increased reliability of journey times	7	87	7	94	7	80
Reduced journey times	8	81	9	85	8	77
More provision of roadside service areas/laybys	9	73	10	81	9	64
Better facilities at roadside service areas/laybys	10	70	8	89	11	53
Better notification to road users about future planned work	11	64	11	70	10	58
Better lighting on the network	12	37	12	48	12	27
Better signage on the network	13	27	13	30	13	24
Better data and phone connections on the network	14	17	16	14	14	19
Better maintained verges/roadside environment	15	17	14	15	15	18
Better protection of the wider environment	16	16	15	14	16	18
Better journey planning tools	17	10	17	9	17	12

Annual distance travelled does not have an impact on the position of the top two priorities. 'Improved quality of road surfaces' and 'better management of unplanned delays' are respectively ranked first and second by both those driving more than 50,000 miles annually, as well as those with lower annual mileage. Better management of roadworks is the third most important priority for improvement among those driving more than 50,000 miles, while safer design and upkeep of roads is the third most important priority among those driving less than 50,000 miles annually.

Base: All England HGV SRN users, 241

HGV drivers' priorities for improvement to the SRN

by vehicle type

	TOTAL HGV		Articulated		Rigid	
	Rank	Index	Rank	Index	Rank	Index
Improved quality of road surfaces	1	347	1	329	1	355
Better management of unplanned delays such as accidents or breakdowns	2	220	2	245	2	214
Better management of roadworks	3	184	7	119	3	201
Safer design and upkeep of roads	4	180	3	172	4	185
Better behaved drivers	5	143	5	138	5	133
Better information about unplanned disruptions such as accidents	6	127	4	141	6	123
Increased reliability of journey times	7	87	9	85	7	89
Reduced journey times	8	81	10	82	8	81
More provision of roadside service areas/laybys	9	73	6	127	10	62
Better facilities at roadside service areas/laybys	10	70	8	118	11	61
Better notification to road users about future planned work	11	64	11	46	9	62
Better lighting on the network	12	37	12	34	12	39
Better signage on the network	13	27	13	28	13	27
Better data and phone connections on the network	14	17	15	10	15	19
Better maintained verges/roadside environment	15	17	16	8	14	19
Better protection of the wider environment	16	16	17	7	16	19
Better journey planning tools	17	10	14	12	17	10

Articulated and rigid vehicle drivers both highlight 'improved quality of road surfaces' and 'better management of unplanned delays' as their top two priorities. Better management of roadworks is ranked third by drivers of rigid vehicles and seventh by drivers of articulated vehicles. Articulated vehicle drivers prioritise the safer design and upkeep of roads more and rank this third (ranked fourth by rigid vehicle drivers).

Base: All England HGV SRN users, 241

Overall top-of-mind improvements for HGV drivers

	HGV drivers	Less than 50,000 miles	Over 50,000 miles
Fewer roadworks	14%	14%	13%
Better road surfaces – fewer potholes – improved road quality	10%	10%	8%
More road capacity	5%	6%	1%
Reduced congestion – improved traffic flow	6%	8%	3%
More information	11%	7%	21%

Before road users answered questions on their priorities for improvement, we asked them how the experience of travelling on the SRN could be improved. This gave us their 'top-of-mind' responses. The top improvements highlighted by HGV drivers are fewer roadworks and better roads/road surfaces.

Q15 Overall, how do you think that the Highways Agency could improve the experience of travelling on the Strategic Road Network for you?

“There are a number of essential road and motorway upgrading of the A1 from dual to motorway... Doing them all at once doesn't help.”

Male, 55-59, North East

“Dual more of the single carriageways to lessen bottlenecks.”

Male, 35-44, East

“Fill in potholes and not do as many roadworks at the same time.”

Female, 25-34, South East

“Keep the information signs up to date and accurate.”

Male, 45-54, North West

Improvements to local roads for HGV drivers

	HGV drivers	Less than 50,000 miles	Over 50,000 miles
Better road surfaces – fewer potholes – improved road quality	50%	51%	50%
More information	7%	7%	7%
More road capacity	6%	8%	2%
Better road surfaces – fewer potholes – improved road quality	5%	7%	0%
Fewer roadworks	3%	3%	3%

After respondents had completed their focus on the SRN, they were asked to identify how local roads could be improved. Again, as was seen among car, van and motorcycle SRN users, the most common area for improvement on local roads identified by HGV drivers is 'better roads and road surfaces'.

Q17 Overall, how do you think that local roads (for example roads which are not part of the Strategic Road Network motorways and main 'A' roads) could be improved?

“Better road surfaces and more bypasses for busy towns.”

Male, 65-74, Midlands

“Resurface & maintain better, less (sic) speed bumps, as the potholes act as speed bumps.”

Male, 45-54, North West

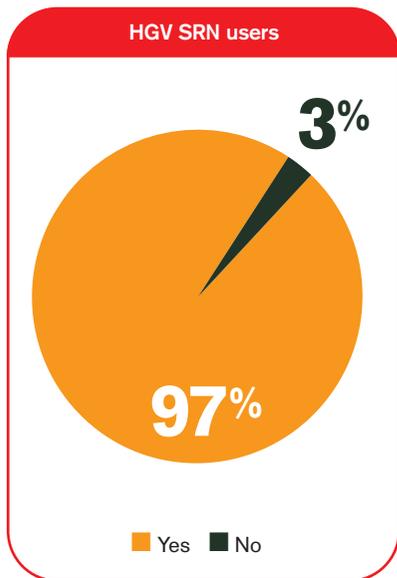
“Include signage about SRN delays/roadworks when approaching SRN junctions.”

Male, 55-59, Midlands

“Cutting back the hedgerows and keeping them maintained in a proper state.”

Male, 65-74, South West

Awareness of Highways Agency



At the time of the research, the launch of Highways England had just taken place and therefore respondents were asked about awareness of the Highways Agency. Awareness among HGV drivers is almost universal and higher than that for car/van drivers (92 per cent) and motorcycle (93 per cent) SRN users.

Q18 Had you heard of the Highways Agency before this survey?

Base: All England HGV SRN users, 241

Awareness of Highways Agency investment plans

	HGV drivers
Have heard/seen a lot of information about the investment plans	11%
Have heard/seen some information about the investment plans	21%
Have heard/seen a little information about the investment plans	25%
Have heard/seen nothing about the investment plans	43%
All heard/seen at least a little information	57%

Awareness of the Highways Agency's investment plans among HGV drivers is broadly aligned with other SRN users (54 per cent of car/van drivers and 63 per cent of motorcyclists have heard/seen at least a little information).

Q19 And what, if anything, do you know about Highways Agency's investment plans for the future?

Base: All England HGV SRN users aware of the Highways Agency, 232

Expectations of Highways England

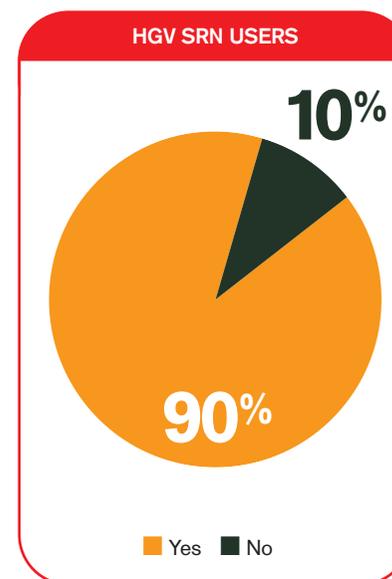
	HGV drivers Online
Very important	27%
Fairly important	47%
Not very important	22%
Not at all important	4%
All important	74%
All not important	26%

Like other SRN users, HGV drivers think it is important to know what Highways England is responsible for.

Q20a/14a How important is greater awareness of what Highways Agency is responsible for?

Base: All England HGV SRN users, 241

Awareness of smart motorways

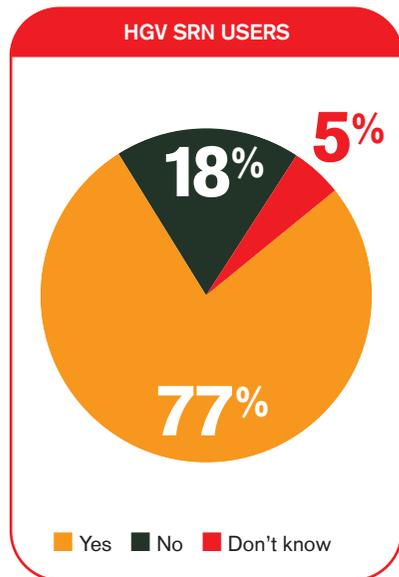


Compared with car and van drivers (68 per cent) and motorcyclists (19 per cent), HGV drivers have the highest levels of awareness of smart motorways (90 per cent).

Q21/15 Were you aware of smart motorways before taking part in this survey?

Base: All England HGV SRN users, 241

Smart motorway use

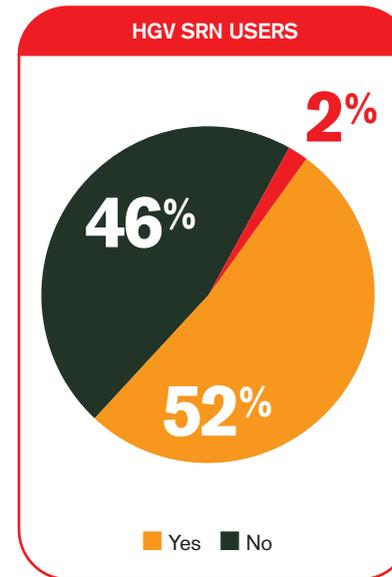


Smart motorway use is highest among HGV drivers (77 per cent). Among car and van drivers 49 per cent report using a smart motorway and among motorcyclists it is 66 per cent.

Q22 And have you ever used a smart motorway?

Base: All England HGV SRN users, 241

Smart motorway information



Despite the relatively high awareness of smart motorways, just under half of HGV drivers (46 per cent) believe there is too little information about smart motorways. This compares with 55 per cent of car and van drivers and 45 per cent of motorcyclists.

Q23 Do you think there is too much, too little or about the right amount of information about smart motorways?

Base: All England HGV SRN users, 241

User confidence

Confidence on motorways	HGV drivers
Very confident	82%
Fairly confident	17%
Not very confident	<1%
Not at all confident	0%
All confident	100%
All not confident	0%

Confidence on main 'A' roads	HGV drivers
Very confident	86%
Fairly confident	13%
Not very confident	<1%
Not at all confident	<1%
All confident	99%
All not confident	<1%

HGV drivers are confident driving on all three types of roads making up the SRN. This group is more likely to be very confident on motorways and 'A' roads compared with car and van drivers (56 per cent and 66 per cent respectively) and motorcyclists (66 per cent and 69 per cent respectively)

Q24a/b How confident are you as a driver on motorways/main 'A' roads?

Base: All England HGV SRN users, 241

User experience

Experience on motorways	HGV drivers
Very experienced	82%
Fairly experienced	17%
Not very experienced	1%
Not at all experienced	0%
All experienced	99%
All not experienced	1%

Experience on motorways	HGV drivers
Very experienced	87%
Fairly experienced	13%
Not very experienced	0%
Not at all experienced	0%
All experienced	100%
All not experienced	0%

Virtually all HGV drivers believe they are experienced driving on the SRN. Reflective of the fact that HGV drivers are doing so for a living, reported experience is much higher than it is for car and van drivers on motorways and 'A' roads (55 per cent and 69 per cent respectively) and for motorcyclists (65 per cent and 73 per cent).

Q25a/b And how experienced would you say you are at driving on motorways/main 'A' roads?

Appendix A Other information

Mileage	HGV drivers
Less than 2,500	13%
2,500 – 4,999	3%
5,000 – 7,499	5%
7,500 – 9,999	3%
10,000 – 19,999	22%
20,000 – 29,999	15%
30,000 – 49,999	12%
50,000 or more	26%
Don't know	1%

Q26/7 Approximately how many miles would you say you drove (on any roads) in the last 12 months?

Vehicle used on any road	HGV drivers
Bicycle	32%
Car	90%
Van	35%
Motorcycle	15%
Bus or coach	19%
Taxi	7%
Large or heavy goods vehicle	100%
Other	4%
More than one vehicle used	89%

Q28a/b Which of the following do you ride/drive on any roads?

Base: All England HGV SRN users, 241

Appendix B Methodology

HGV drivers

This research establishes the priorities for improvement among HGV drivers using a similar method to the car, van and motorcyclist survey. From March to May 2015 participants were asked about their most recent journey on the Strategic Road Network (SRN) within the last month and were asked to identify the journey using a map of the SRN. Those that had not travelled on the SRN in the last month were not included in the survey. 17 improvement areas were presented in randomised batches of four for the online participants and they were asked to identify their highest and lowest priorities. Participants were asked to think specifically about their most recent SRN journey when making their selection.

To determine the rankings we used a statistical approach called Maximum Difference Scaling or 'MaxDiff'. This asked

respondents to indicate their highest and lowest priority for improvement from lists of four statements. The results were combined and analysed to produce ranking and index values. MaxDiff was used to make it easier for respondents to compare possible improvements against each other.

In order to conduct the survey in a similar way to the car, van and motorcycle research, an online approach was used for HGV drivers. An email address sample of HGV drivers was purchased from a business database provider and the survey was promoted through trade organisations and relevant unions. There were 241 completed responses.

The data has been weighted to ensure that the results are representative of the HGV sector³ (see Appendix C for more information).

³ Data from the Department for Transport (DfT) and including the *Public Attitudes to Roads in England*, *ONS Opinions and Lifestyle Survey* and DfT in-vehicle GPS data were used to set weighting factors by journey purpose, age, trip length and region

Appendix C

Weighting procedure

We weighted the data by three factors to correct any skews in the sample caused by varying response rates between road users. The three weighting factors were:

Vehicle type

Data from the Department for Transport's February 2015 Road freight economic, environmental and safety statistics were used to weight respondents by rigid vehicle (71 per cent), and articulated vehicle (29 per cent).

Vehicle weight

The Department for Transport's February 2015 Road freight economic, environmental and safety statistics were also used to weight respondents by the vehicle size used on the Strategic Road Network (SRN) in the last month: 3.5-7.5 tonnes (11 per cent), 7.5 tonnes+ (82 per cent), and other (7 per cent)

Trip length

The DfT in-vehicle GPS data was used to weight SRN journey length: under 10 miles (40 per cent) and 10 miles and above (60 per cent).





Contact us

If you want to know more about the work we are doing on your behalf contact us:

Fleetbank House, 2-6 Salisbury Square, London EC4Y 8JX

t 0300 123 0860

w www.transportfocus.org.uk

e info@transportfocus.org.uk