



Logistics and Coach Survey: Strategic Roads

September 2020

Foreword

England's motorways and major 'A' roads, the Strategic Road Network managed by Highways England on behalf of the government, play a pivotal role in moving goods and passengers around the country. Transport Focus's new Logistics and Coach Survey: Strategic Roads measures satisfaction among businesses who run lorries and coaches on these roads.

We published our first survey of these businesses in 2018. Since then we've been working with the Department for Transport, Highways England, Office of Rail and Road and trade bodies to develop the survey. This culminated in it being set out as a requirement – a Performance Indicator – in the government's

second Road Investment Strategy, covering 2020 to 2025.

This document sets out the findings from our pre-launch pilot, carried out in February and March 2020. It shows that at that time, prior to the Covid-19 national lockdown, around two in five businesses were satisfied overall. The new survey will be launched in October 2020 and repeated every four months thereafter.

We encourage Highways England to use these preliminary findings to plan how it will better meet the needs of these businesses during Road Period 2.

Anthony Smith

Chief executive, Transport Focus

How we did it

Individuals responsible for operating vehicles over 3.5 tonnes ('vehicle managers') must be licensed by the Driver and Vehicle Standards Agency, with their details shown on the publicly-available 'O' licence database. Transport Focus used this database to select vehicle managers and invited them to complete a questionnaire. The results in this summary document are based on responses from 414 logistics and 112 coach vehicle managers. This was around half the intended number because fieldwork was affected by Covid-19. Details of the methodology, including weighting regimes, are available from Transport Focus. References to coach operators includes bus companies where they run on England's strategic roads.



Results

Overall satisfaction

We asked the question ‘Overall, how satisfied or dissatisfied are you with England’s motorways and major ‘A’ roads when it comes to meeting your business needs?’ Just over two fifths (42 per cent) were satisfied overall with the Highway’s England motorway and major ‘A’ road network, while three in ten were dissatisfied.

Overall satisfaction for the freight sector was 43 per cent. Within freight, among those using articulated lorries (made up of two separate sections, a driving cab and a trailer) it was 39 per cent and among those using rigid lorries (those without a separate driving cab) 48 per cent.

The figure for the coach sector was 31 per cent.

Planning routes

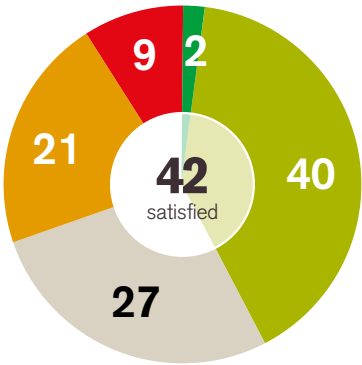
Around half the firms said they planned routes a few days before, with a third saying on the day. Around half said they used internal systems to plan routes. We asked about the availability of information to plan routes and found that all aspects were rated good by less than 50 per cent, with warning of lanes being shut being the lowest. Of the information that is available, 76 per cent of firms said it was accurate.

We asked how far in advance vehicle managers would like notice of roadworks. Around half said a few days and a further quarter said a week to a fortnight before.

1 Overall satisfaction (%)

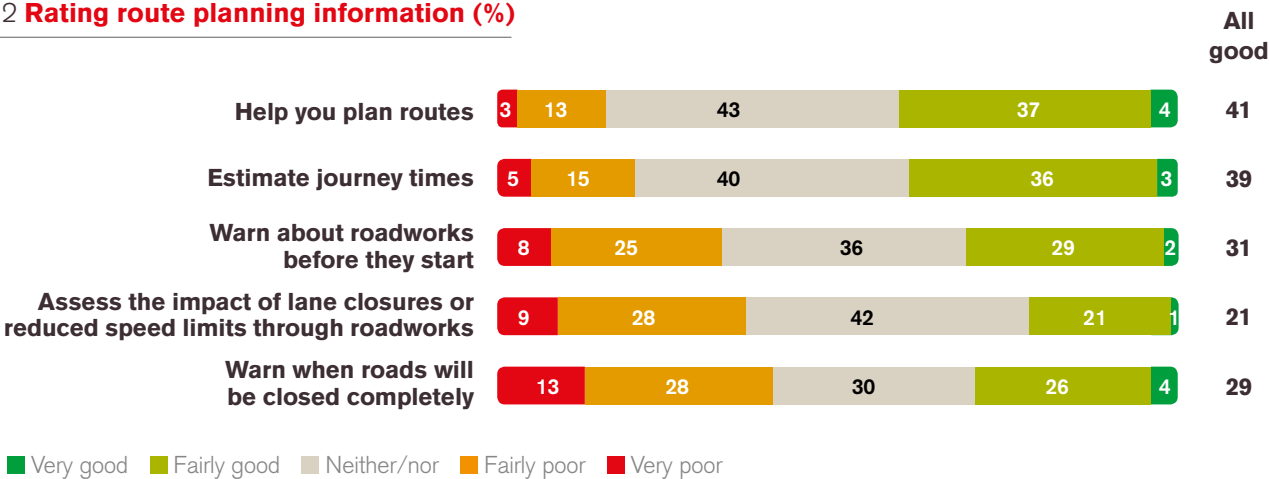
- Very satisfied
- Fairly satisfied
- Neither/nor
- Fairly dissatisfied
- Very dissatisfied

Q2) Overall, how satisfied or dissatisfied are you with England’s motorways and major ‘A’ roads when it comes to meeting your business needs (n = 516)



"Road closure circulated via email once a week. Reduce the length of some motorway roadworks."

2 Rating route planning information (%)



Q12) When organising these routes/schedules, how do you rate the availability of information about these roads to: (n = 455, 452, 454, 450 and 453 respectively)

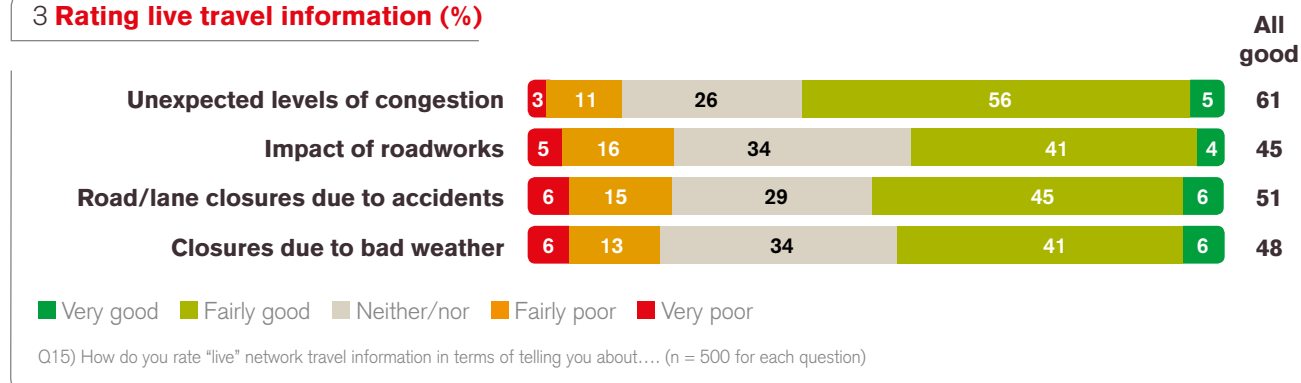
On the day information

The availability of live travel information was rated better, but two measures still scored below 50 per cent.

The rating of the accuracy of the information available was 80 per cent.

"Repair road surfaces quicker – two years to fill potholes is too long."

3 Rating live travel information (%)

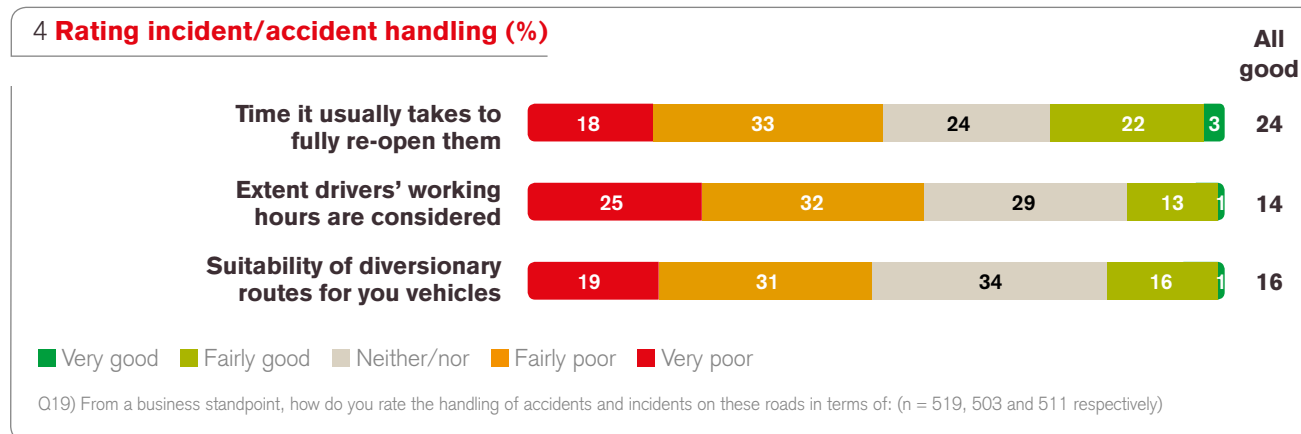


Responding to incidents and accidents

Few said very good in this area, with significant numbers saying poor. The extent to which driving hours are considered when handling incidents/accidents was rated least well.

"Stopping lanes being coned off when work in the highway is not active."

4 Rating incident/accident handling (%)



"Better communication to businesses and possible involving businesses and people who use the roads day in day out before making major decisions."

"I would like to see more communication between Highways England and local authorities. The aim of this would be to ensure that local roads that surrounding major roadworks are left clear for adequate diversion routes."

Road surface

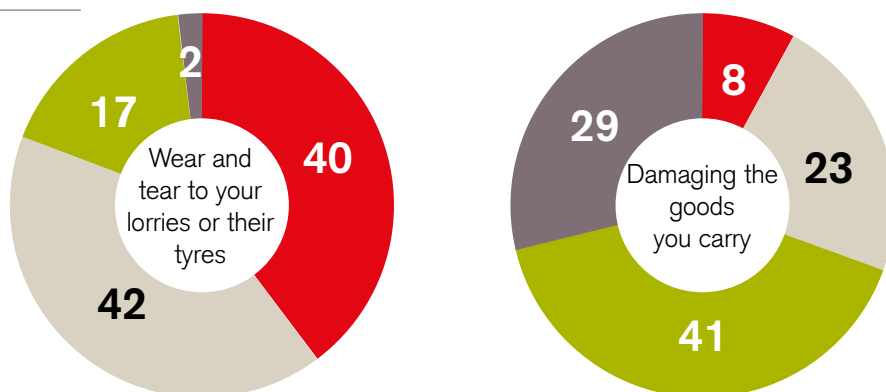
The freight sector felt that road surfaces cause appreciable wear and tear on their vehicles, but that there was minor or no impact to the goods being carried.

"Hard shoulders kept on all motorways and no 4 lane smart dangerous motorways."

5a Road surfaces – freight (%)

- Significant
- Moderate
- Minor
- None

Q21) To what extent, if any, does the condition of the surface on these roads impact your business in terms of: (n = 405 and 401 respectively)

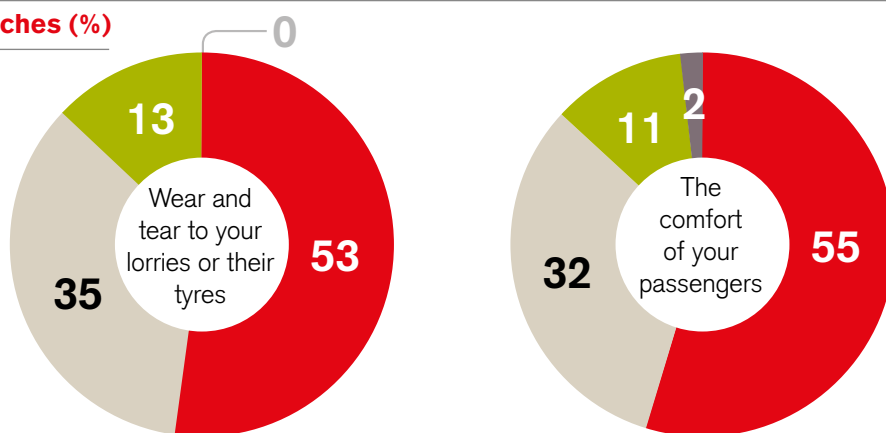


The coach sector also felt that road surfaces cause appreciable wear and tear on their vehicles, but that there was also an appreciable impact on passenger comfort.

5b Road surfaces – coaches (%)

- Significant
- Moderate
- Minor
- None

Q21) To what extent, if any, does the condition of the surface on these roads impact your business in terms of: (n = 110 and 107 respectively)



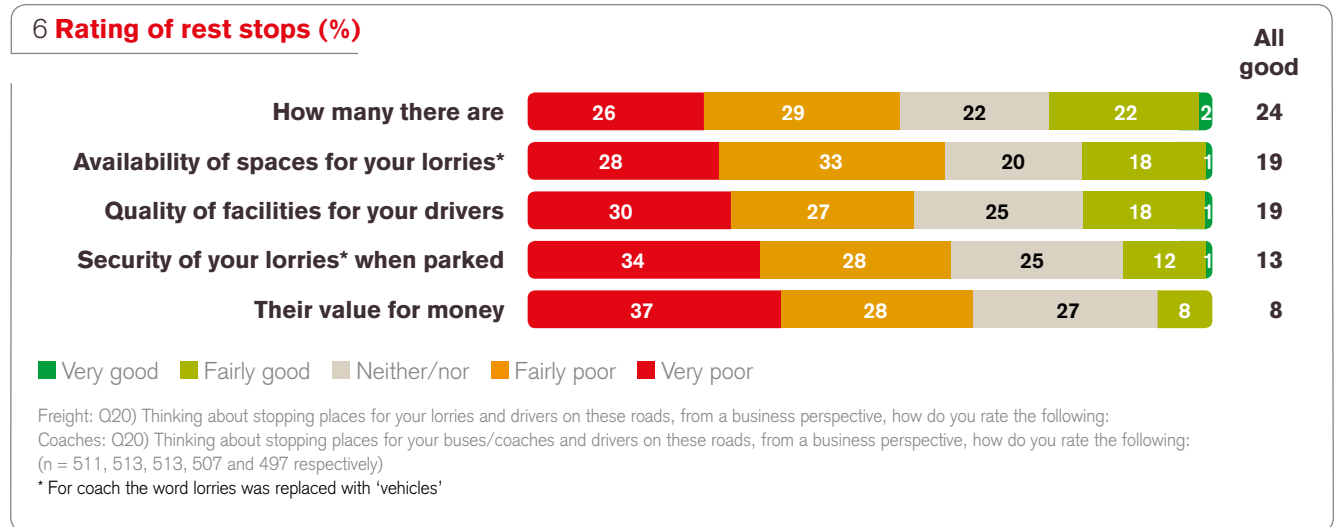
"Reopening of busy 'A' roads & motorways after a non-fatal accident (illegible) quicker, i.e. moving vehicles to the side of the road and opening lanes."

"Get a second option with designs intersections/junction. Some really poor design (A1/A428 Black cat roundabout)."

Rest stops

There is significant dissatisfaction with the quality of rest stops, in particular regarding their value for money.

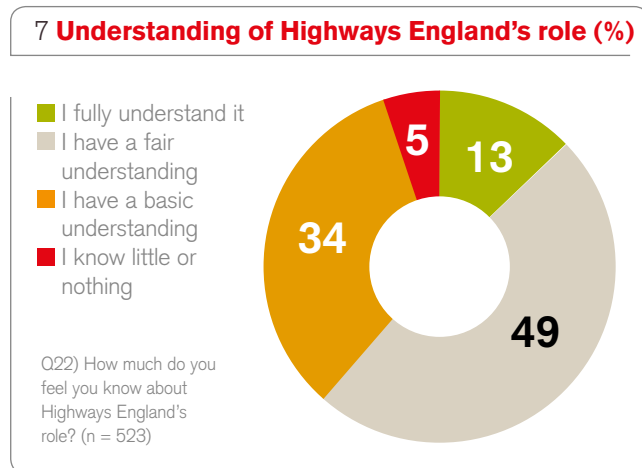
6 Rating of rest stops (%)



Awareness of Highways England's role

The vast majority of vehicle managers felt they had a fair or basic understanding of Highways England's role. Very few felt they had little or no understanding.

7 Understanding of Highways England's role (%)



"More urgency in reopening roads following traffic incidents. Seems to be excessive amounts of investigation before roads are reopened."

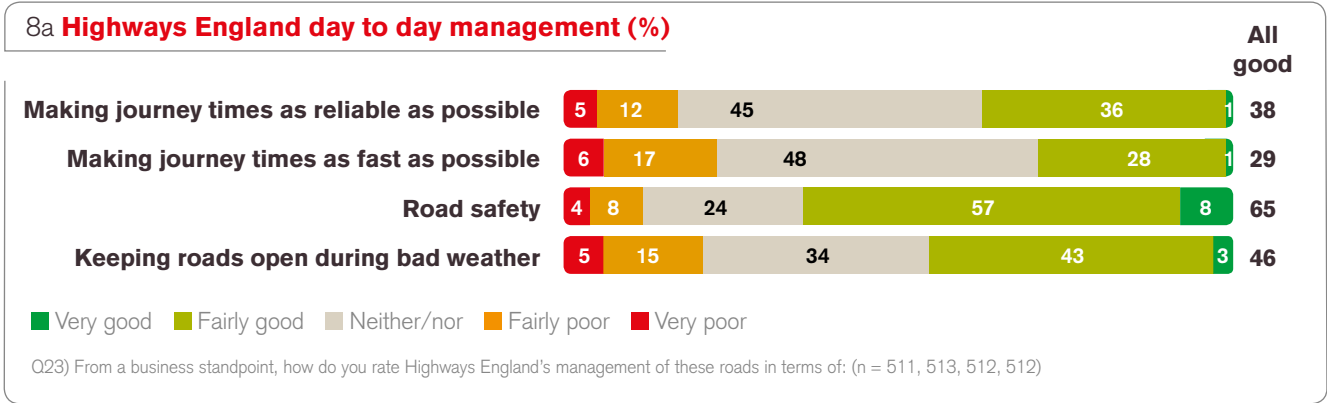
"We truck our goods over night when majority of the roadworks are put in place, which affects our tight delivery schedules - no thought for hauliers who move majority of goods through the night. Closures make no sense."



View on Highways England's performance

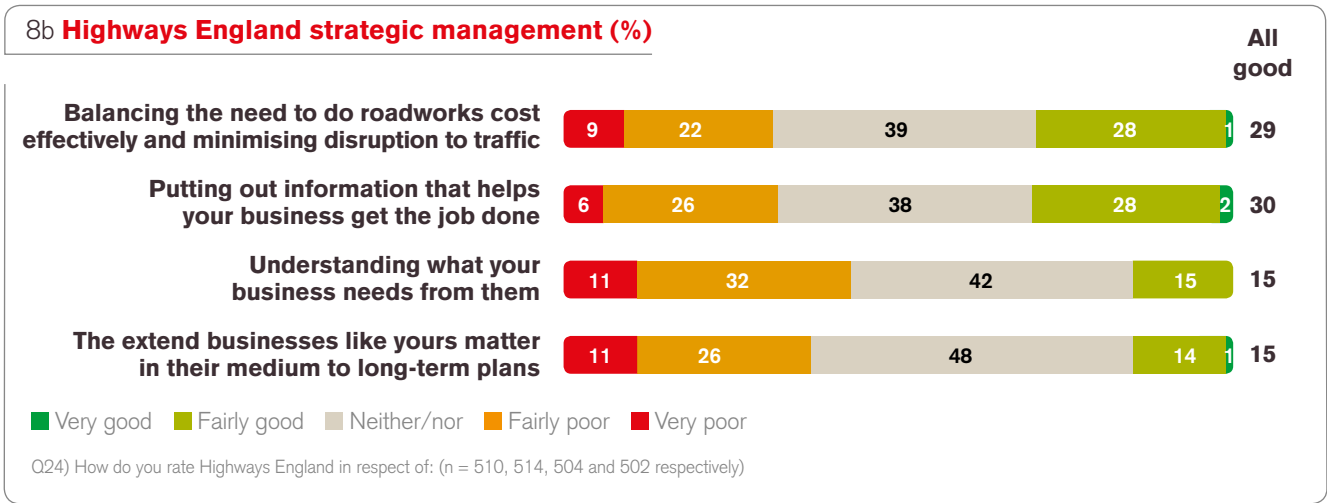
On day to day management of its roads, safety scored highest at 65 per cent good with few saying poor. On the other three categories there was a net positive rating (good

less poor). Keeping roads open in bad weather received the highest net positive rating, and making journey times as fast as possible the least.



In terms of strategic aspects, few vehicle managers said Highways England was very good with a significant proportion answering poor. In particular, 'understanding

what your business need from them' and 'the extent to which businesses like yours matter in their medium to long-term plans' scored poorly.



What needs to improve

We asked vehicle managers what they would like to see improved. One dominant theme emerged from analysing the comments: how roadworks are carried out. This encompassed both short-term and long-term works. Key messages with long-term works were to do shorter stretches more intensively and so finish more quickly, and dislike of long sections where few people appear to be working. With short-term roadworks the key messages were: carry them out when it is best for hauliers, do not close roads completely (requiring a diversion), get the work done when you said you would and coordinate with other

agencies to minimise the number of closures. Further points on short-term roadworks are on communicating effectively so businesses can plan around the problem and making sure diversion routes are suitable for lorries.

"We still see miles and miles of cones and no work being carried out for long periods of time."

9a Improvement area (%)



Q25) Again, sticking with meeting your business needs from these roads, what one thing would you like to see done differently? (n = 403)

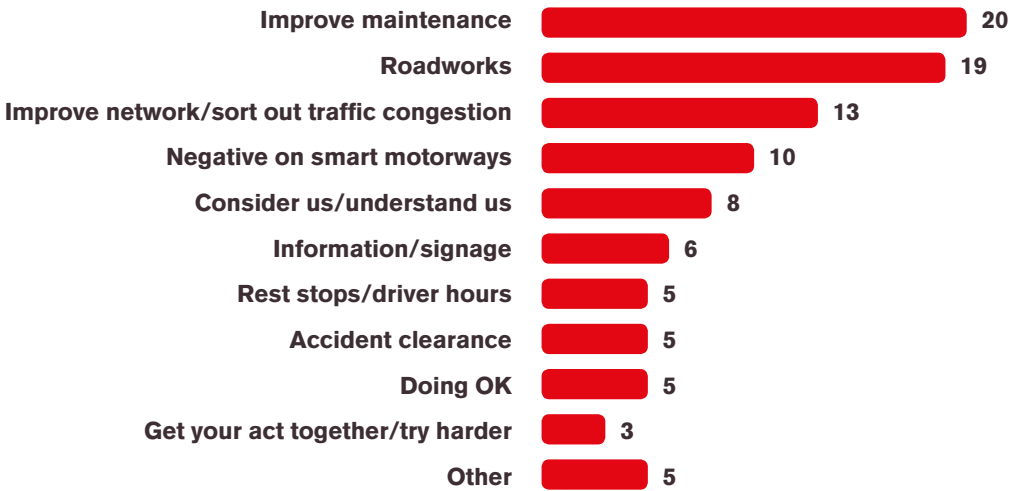


The other key mentions for improvement are speedier clearance of incidents/accidents, fill potholes/maintain them better and better information/signage. There was also a contingent who held negative views about smart motorways.

We also asked vehicle managers what they would discuss if they met the chief executive of Highways England. Although this elicited similar themes as the 'improvement question' there was greater focus on the design of the network and maintaining surfaces in good condition. The chart below shows this.

"Stop smart motorways, bring back the hard shoulder/refuge area. It's likely people are being involved in a terrible accident, I would like this change before more lives are lost."

9b **Topic would discuss with chief executive of Highways England (%)**



Q26) Finally, what would be the one thing about managing these roads you would want to say to the Chief Executive of Highways England if you met him? (n = 373)

Contact Transport Focus

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Transport Focus is the operating
name of the Passengers' Council