



Logistics and Coach Survey: Strategic Roads

Wave zero findings

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Introduction

- the freight and coach sectors are key customers of the Strategic Road Network (SRN); its performance is economically important
- the survey is listed as a performance indicator within the second Road Investment Strategy
- the Logistics and Coach Survey: Strategic Roads (LCSSR) focuses on how well the SRN delivers for these businesses; drivers' views are collected through Strategic Roads User Survey
- the inaugural LCSSR was conducted in early 2018; around 1000 responses
- the Confederation of Passenger Transport, Logistics UK (formerly Freight Transport Association), and Road Haulage Association involved in its development and encouraged their members to fill out the survey
- the methodology was refined in discussion with Department for Transport (DfT) and Highways England.

LCSSR methodology of spring 2020 (wave zero)

Much consideration on methodological refinements 'sampling and method document (version 20 January 2020)' outlined latest aspects of survey approach (save some marginal questionnaire revisions subsequently). Method outline:

1. Sampling proportional to number of vehicles managed. Main sample logistics. Smaller sample bus/coach.
2. Survey issued to responsible director/transport manager (RD/TM) as listed on the O Licence database (a census of all managers of vehicles over 3.5T).
3. Issued covering letter and paper questionnaire. Proposed to have initial mailing; a second mailing around two week later with a reminder; and a third mailing with another reminder with questionnaire. Survey period mid February to mid March 2020. RD/TMs were asked to send back even if they do not use SRN.

LCSSR methodology of spring 2020 (wave zero)

5. Logistics responses weighted to DfT RFS0117 in two tiers: tier 1 goods mileage by rigid/articulated; tier 2 criterion for rigid - vehicle weight groupings, and articulated – whether own/other firms' goods hauled.
6. The questionnaire was refined from 2018 version. Consulted DfT, Highways England and trade bodies. Threshold criterion for completion based on using SRN once a week (most in 2018 used at least once a week). Questionnaire was eight sides of A4 in length and contained a map of the SRN.
7. The trade bodies supported survey and sent a note to their members encouraging completion.
8. Last time 27 per cent response rate. Sampled on premise of similar response rates (although expected many bus/coach segment to be non-SRN using buses
9. Added a few questions the survey to understand more about the profile of those completing it.

Objectives of spring 2020 (wave zero) survey

- produce results in its own right as a survey
- final learnings before deployment during Road Period 2 (full operation to start surveying in October 2020).

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**Key outcomes regarding
survey participation**

Response rate percentage

Issued 3962 freight and 1246 bus/coach.

- Gross response numbers 529 freight, and 169 bus/coach. **A gross response rate of 13.3 per cent freight and 13.5 per cent bus/coach.**
- Empty returns and non-users numbered 115 freight and 57 bus/coach
- Net response 414 freight and 112 bus/coach and **net rate of 10.4 per cent and 9.0 per cent.**
- Covid-19 impact. Fieldwork was curtailed in mid-March and we achieved around half the expected number of returns as a result.

The achieved response rate nevertheless confirms that this audience is responsive to a postal approach.

Response by vehicle category (freight)

The proportion by category is shown in the table below, alongside the proportions of 'laden vehicle mileage' in DfT table RFS0117*.

Vehicle group	Response %	RFS0117 %
Rigid – gross weight over 3.5T to 7.5T	6%	12%
Rigid – gross weight over 7.5T to 25T	22%	16%
Rigid – gross weight over 25T	21%	15%
Articulated own goods	14%	15%
Articulated others goods	37%	42%

Sampling was proportional to the number of vehicles managed. According to DfT Table VEH 0524 around 70 per cent of 3.5T+ vehicles are rigid, but account for 43 per cent of laden mileage.

Response proportions are much closer to the laden mileage profile, so low weights were needed (the freight weighting efficiency is 91 per cent).

** Note that RFS0117 is laden mileage on all roads not just SRN mileage. This was the agreed industry data to weight to.*

Q3) Which one lorry type makes the majority of the trips using these roads? Q4) For the trips using these roads, do you mainly transport goods [on own account / for hire and reward]: n = 414.

Who responded in freight sector (part 1)

- 96 per cent used SRN every day

Frequency of SRN use	%
Every weekday	96
A few weekdays	3
Around once a week	1

- 69 per cent who completed were addressee, 28 per cent someone else; (three per cent did not want to say)
- 63 per cent said they belong to an organisation representing freight

- 76 per cent have typical journey durations over three hours (around seven in 10 of this group being over five hours).

Time on SRN typically	%
No typical length	14
Up to 1 hour	2
1 to 3 hours	8
3 to 5 hours	20
Over 5 hours	55

Q5) On average, how often do your lorries use these roads: n = 414. Q29) The person completing this questionnaire was ...[The person we sent it to/Someone else/Prefer not to say]: n = 410. Q31) Do you belong to any organisation which represents the freight sector: n = 414. Q6) How long, typically, would your lorries spend on these roads when they use them: n = 412.

Who responded in freight sector (part 2)

- 53 per cent have 30 mins arrival windows.

Arrival time flexibility	%
None	9
15 minutes	13
30 minutes	33
1 hour	26
2 hours	7
Less time critical than that	12

- Most used roads are the ones with highest vehicle kilometres: M1, M6 and M25.

- The proportion of lorries managed that use the SRN:

- Examining line by line data from the two questions (number of vehicles managed and number using SRN weekly).
- 80 per cent said all their vehicles use SRN. Of the remainder, half stated majority use SRN.

So, almost all of their fleets are using the SRN.

Q8) When your lorries use these roads, how much flexibility do they usually have on their arrival time: $n = 413$.

Q7) Which three of these roads do your lorries use most: $n = 414$.

Q27) How many lorries do you manage, and how many of them use England's motorways/major 'A' roads: $n = 414$.

Who responded in freight sector (part 3)

The job title was provided in 381 responses:

- those with transport manager in title is 149 (about two fifths)
- those with director in title is 122 (about a third)
- other prevalent titles are: fleet manager; logistics manager; operations manager; and compliance.

Overall, the right audience appears to have answered the survey. There are very few responses from administrative staff or office managers, or job titles away from vehicle/transport/ownership roles. We intend to keep this question to check over time that a consistent participating audience is maintained.

As regards the industry sector: there was a mix of answers. About a third used a general term such as haulage/transport/pallets.

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Results for the freight sector

Note: 'All satisfied' and 'All good' are the whole number rounded sums of their constituent values with decimal places. Constituent values are shown as rounded whole numbers. Sometimes it looks like there is a one point difference if summing rounded constituent values to its 'all satisfied' or 'all good' value (e.g. 40.49% + 2.38% round to 40% and 2%; the sum of 42.87 rounds to 43%)

Overall satisfaction - freight

Overall satisfaction for freight is 43 per cent.



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 = 407).

Overall satisfaction - freight

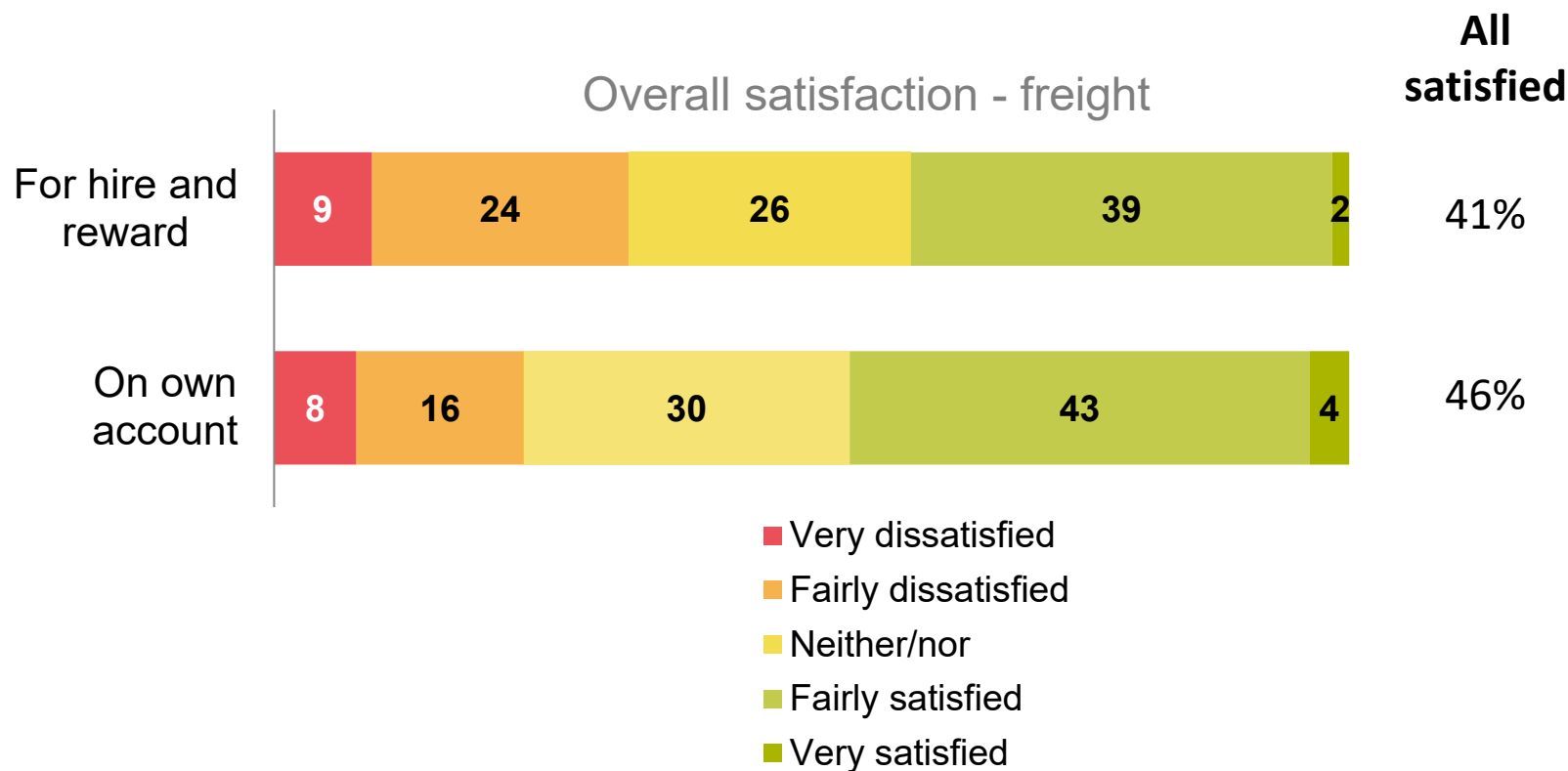
Articulated has lower satisfaction than rigids.



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 = 204 and 203 respectively.

Overall satisfaction - freight

Hire and reward lower than 'own account'.



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= 259 and 148 respectively.

How far ahead routes are schedule/planned – freight

Most schedules/routes planned on the day or a few days in advance.

Office staff involved in majority of route planning.

How ahead schedules organised	%
On the day	36
A few days before	47
A week to fortnight before	5
Around a month before	1
Around three months before	1
Longer ahead than that	1
It varies significantly	9

Who plans your routes	%
Mostly office staff	55
Drivers decide jointly with office staff	33
Drivers decide themselves	12

Q9) How far in advance are your lorries routes and schedules organised: n = 412.

Q11) Who plans your lorries routes: n = 413.

Roadworks notice – freight

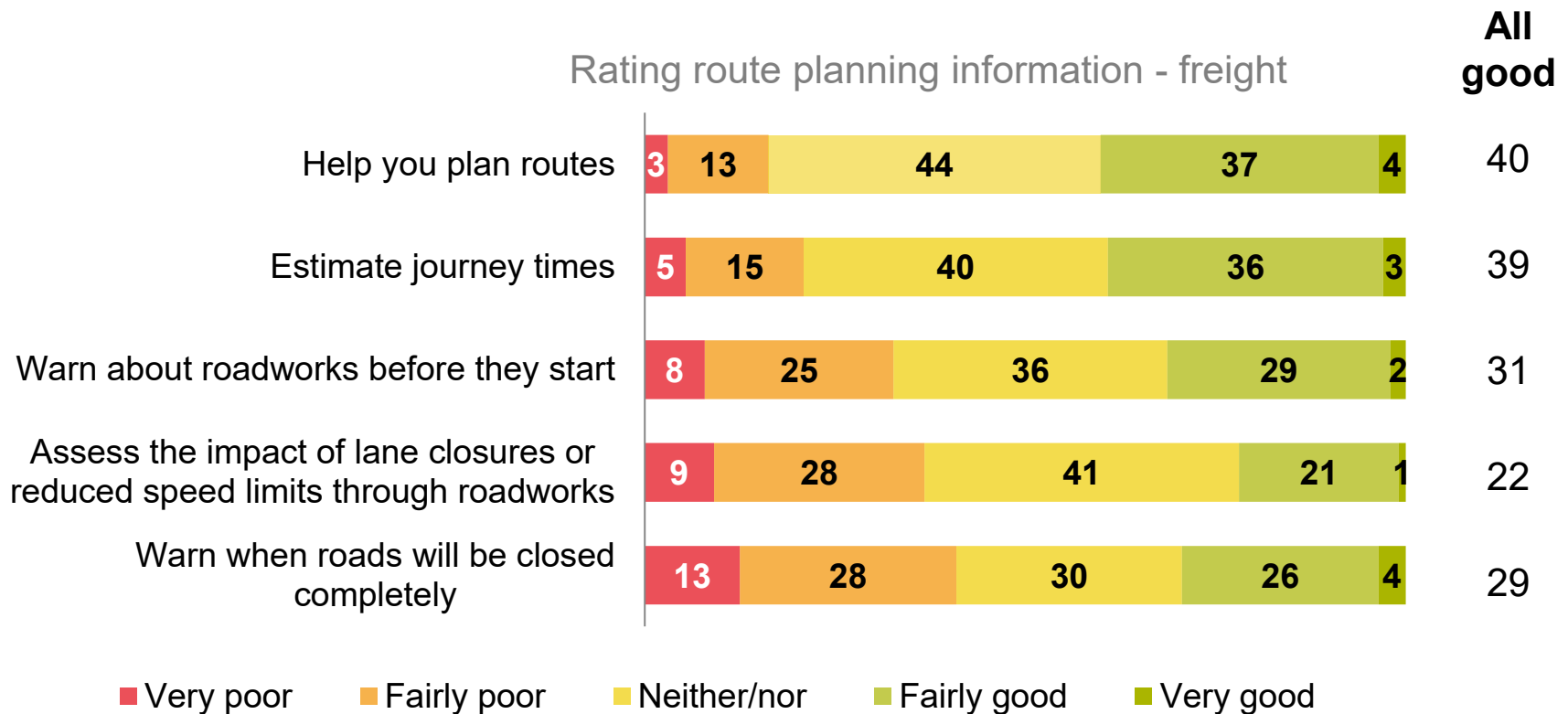
Most want to know about roadworks a few days to a week beforehand.

Roadworks minimum notice	%
At the beginning of the day	14
A few days before	48
A week to fortnight before	28
Around a month before	7
Around three months before	1
Not Important to know in advance	3

Q10) What is the minimum notice you need of where and when roadworks will take place on these roads: n = 413.

Route planning information – freight

Warning of lanes shut/low speeds rated lowest.



Q12) When organising these routes/schedules, how do you rate the availability of information about these roads to.....: n = 355; 353; 355; 351; and 354 respectively.

Main planning information source – freight

355 answers (unweighted). Many provided more than one answer – therefore difficult to provide percentages exactly. Key mentions:

Included Google – 60; Internal system 195; AA 29; Traffic/Highways England/Agency – 55.

Three quarters rated the overall accuracy of these systems as good.

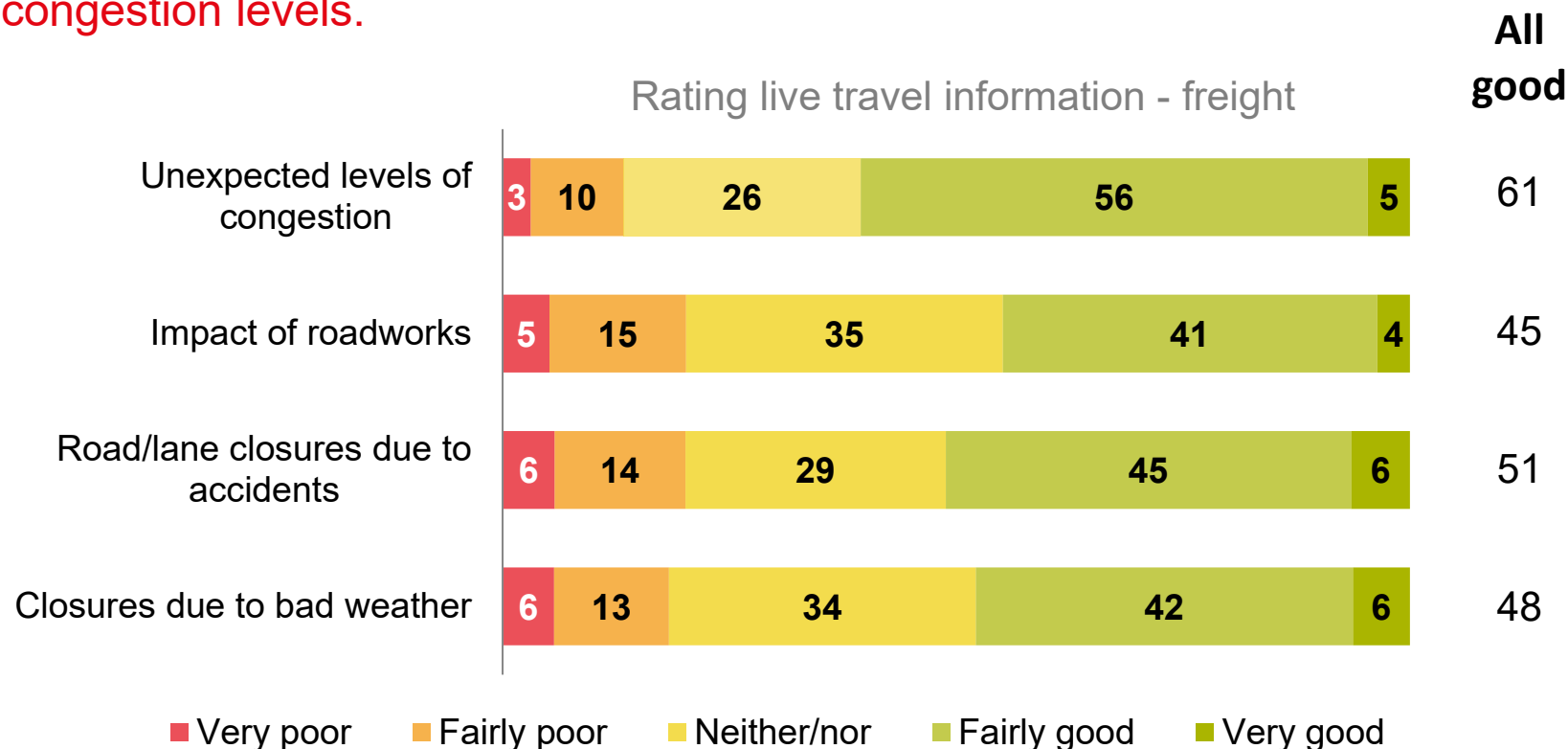
Accuracy of planning information	%
Very poor	1
Fairly poor	2
Neither good nor poor	22
Fairly good	61
Very good	15

Q13) Which information source do you use most when planning routes/schedules: n = 355.

Q14) And how do you rate the accuracy of information from this source: n = 355.

Live travel information - freight

Rated better than advance/planning information, especially congestion levels.



Q15) How do you rate 'live' network travel information in terms of telling you about
 n = 392; 392; 393; and 393 respectively.

Main live travel information source – freight

377 freight answers (unweighted). Many provided more than one answer – therefore difficult to decipher exactly. Key mentions:

Included Google – 71; Internal system 12; AA 54; Radio 59; Traffic/Highways England/Agency – 63. Internal systems not used as much.

Overall – 80 per cent rated accuracy of systems rated as good.

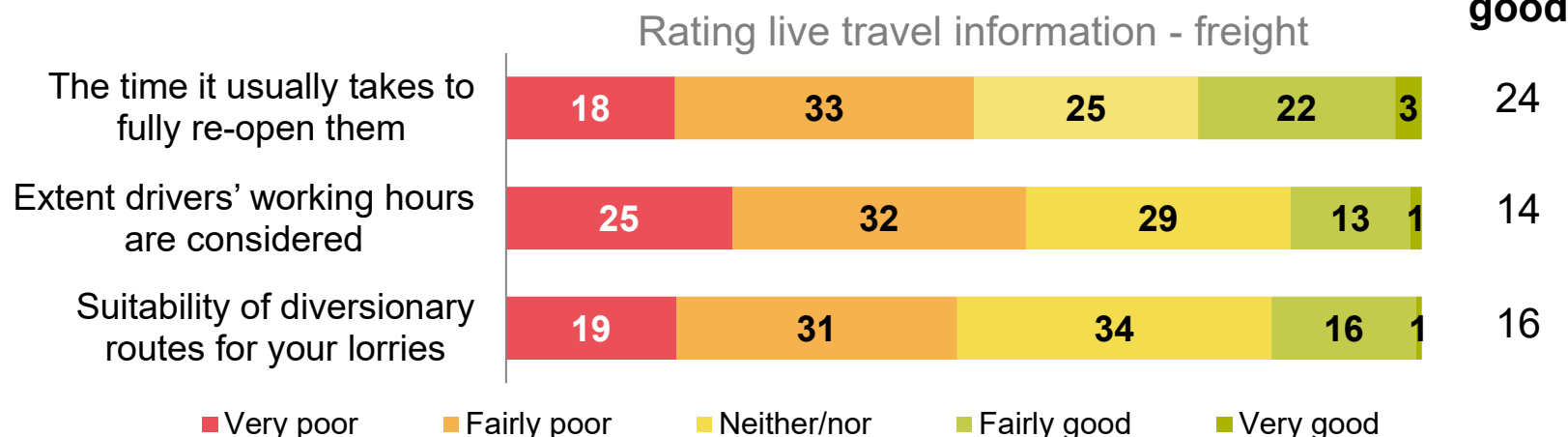
Accuracy of on the day information	%
Very poor	1
Fairly poor	1
Neither good nor poor	18
Fairly good	67
Very good	13

Q16) Which information source do you use most for “live” travel information about these roads: n = 377.

Q17) And how do you rate the accuracy of information from this source: n = 390.

Incident/accident handling – freight

Incident/accident handling - substantial level of poor rating.



Drivers have a substantial role on on-road diversions.

Who controls on road diversions	%
A mix according to circumstances	43
Driver(s)	44
Manager(s) in office	13
Routing software	1

Q19) From a business standpoint, how do you rate the handling of accidents and incidents on these roads in terms of....: n = 409; 396; and 400 respectively. Q18) Who controls your response to on-road diversions or disruptions: n = 413.

Rest stops – freight

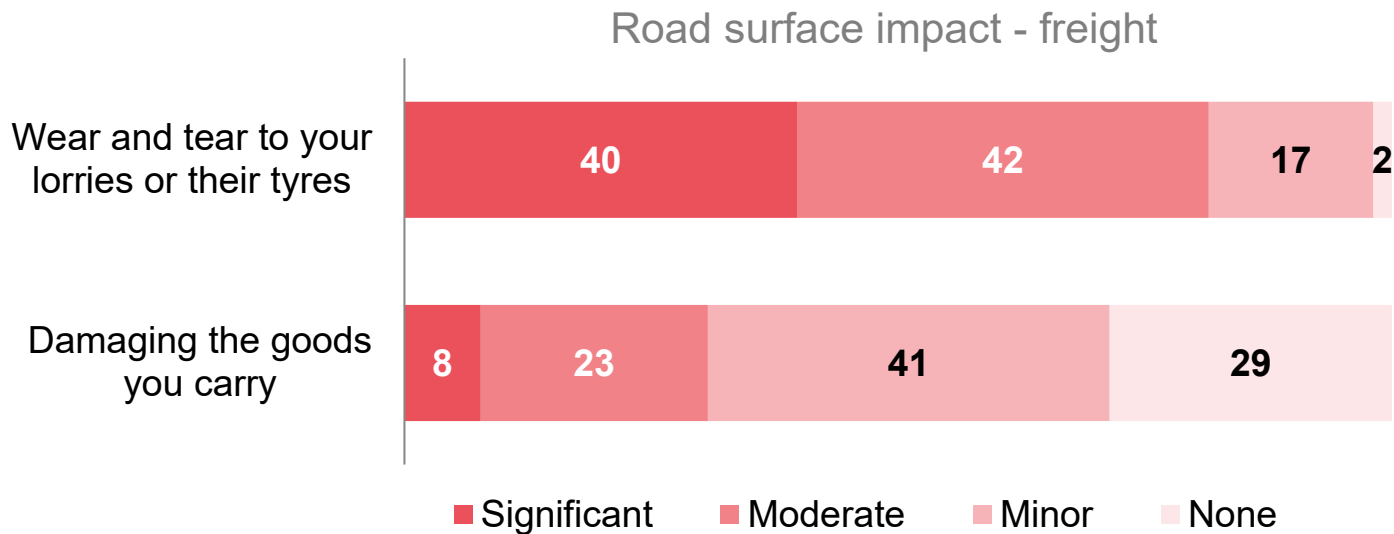
Rest stops rated poorly, notably on vehicle security and value for money



Q20) Thinking about stopping places on these roads for your lorries and drivers, from a business perspective, how do you rate the following: n = 400; 404; 404; 399; and 391 respectively.

Road surfaces – freight

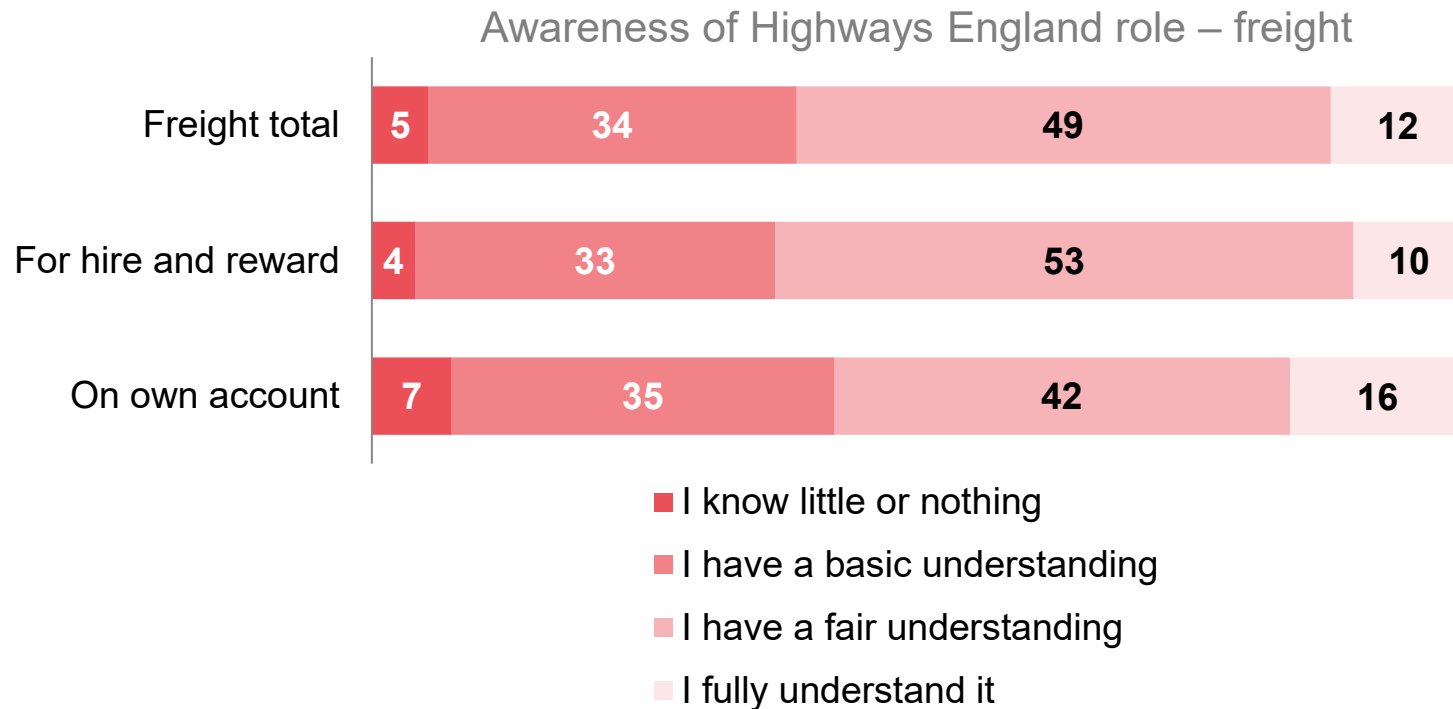
Road surfaces have a substantial impact on wear and tear on vehicles



Q21) To what extent, if any, does the condition of the surface on these roads impact your business in terms of: n = 405 and 410 respectively.

Awareness of Highways England's role - freight

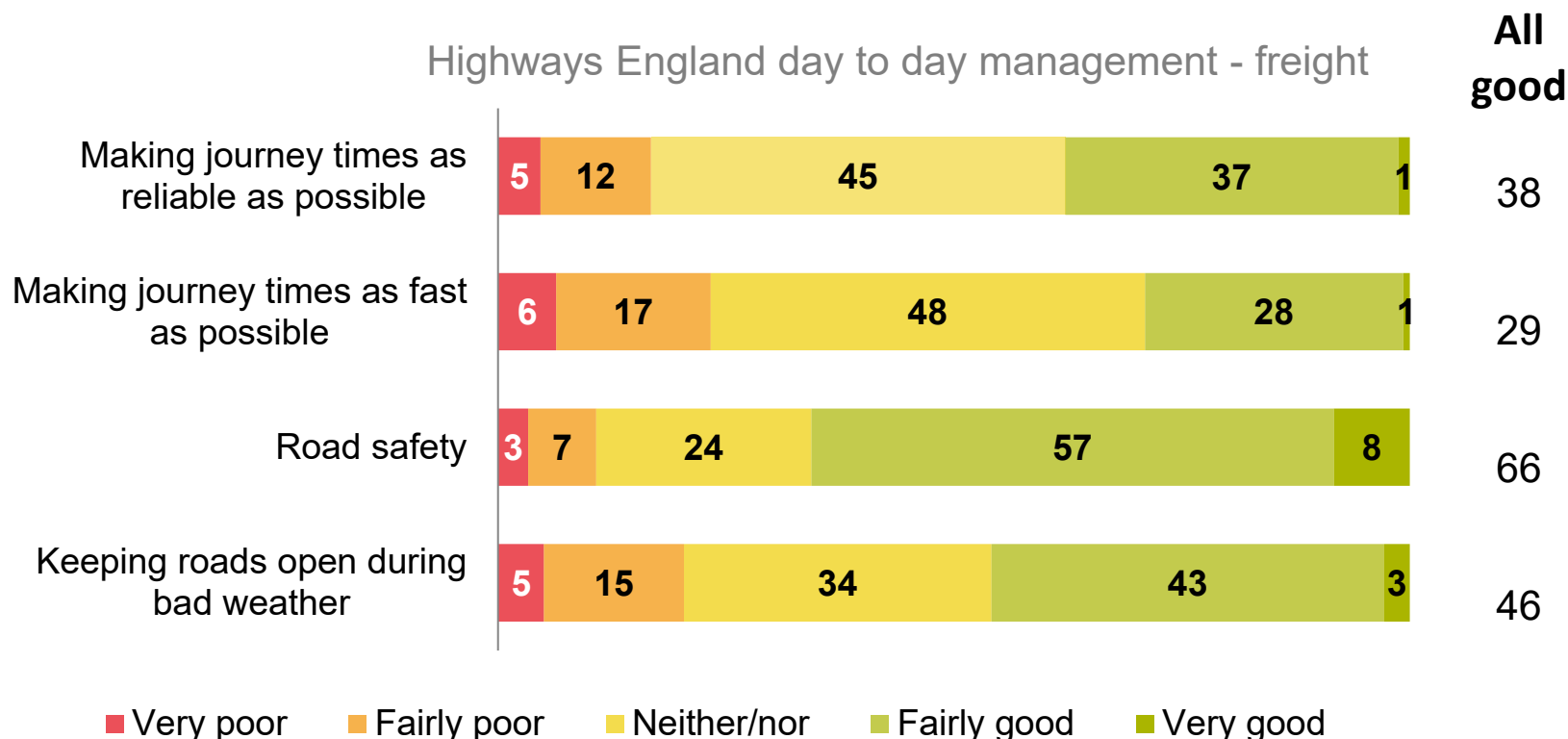
About two thirds have a fair or better understanding of Highways England's role.



Q22) How much do you feel you know about Highways England's role: n = 412; 263; and 149 respectively.

Highways England's day to day management – freight

Safety rated well, whilst journey times rated lowest.



Q23) From a business standpoint, how do you rate Highways England's management of these roads in terms of: n = 402; 403; 402 and 402 respectively.

Highways England strategic management – freight

Understanding their business needs and how much they feel they matter in Highways England's plans are rated lowest.



Q24) How do you rate Highways England in respect of...: n = 402; 406; 399 and 398 respectively.

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Bus/coach results

Note: 'All satisfied' and 'All good' are the whole number rounded sums of their constituent values with decimal places. Constituent values are shown as rounded whole numbers. Sometimes it looks like there is a one point difference if summing rounded constituent values to its 'all satisfied' or 'all good' value (e.g. 40.49% + 2.38% round to 40% and 2%; the sum of 42.87 rounds to 43%)

Who responded in bus/coach sector

Two thirds are private hire/tours

Type of service	%
Public scheduled services	17
Other scheduled services	13
Private hire/tours	64
Rail replacement services	6

Mid value is journeys up to three hours

Time on SRN typically	%
No typical length	22
Up to 1 hour	9
1 to 3 hours	23
3 to 5 hours	18
Over 5 hours	27

Around three quarters use SRN daily

Frequency of SRN use	%
Every weekday	77
A few weekdays	17
Around once a week	6

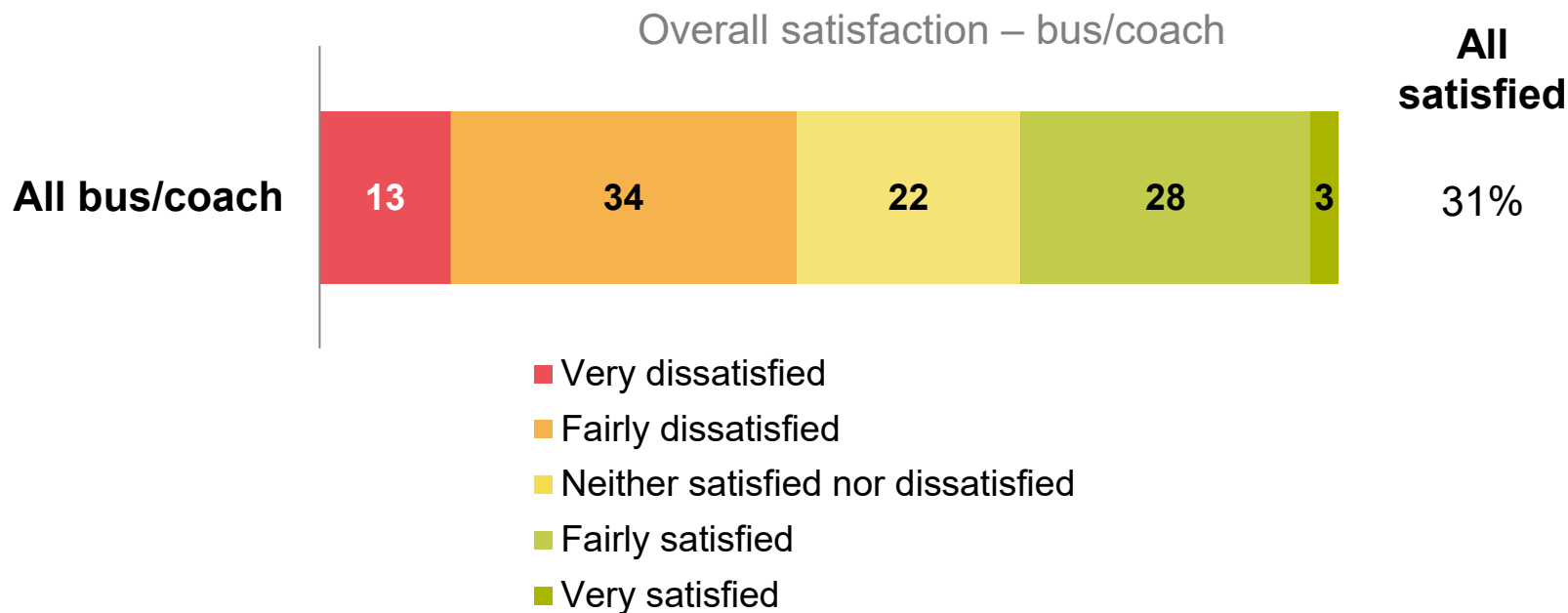
Vast majority have 30 mins or less arrival flexibility

Arrival time flexibility	%
None	27
15 minutes	38
30 minutes	25
1 hour	5
2 hours	0
Less time critical than that	5

Q4) For the trips using these roads, do you mainly provide services that are...: n = 112. Q6) How long, typically, would your buses/coaches spend on these roads when they use them: n = 111. Q5) On average, how often do your buses/coaches use these roads: n = 111. Q8) When your buses/coaches these roads, how much flexibility do they usually have on their arrival time: n = 107.

Overall satisfaction – bus/coach

Overall satisfaction for bus/coach is 31 per cent.



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 = 109.

How far ahead routes are schedule/planned – bus/coach

A month or more accounts for around a third of bus/coach schedules/routes with around a quarter saying it varies. Almost none plan on the day.

How ahead schedules organised	%
On the day	1
A few days before	24
A week to fortnight before	18
Around a month before	8
Around three months before	10
Longer ahead than that	13
It varies significantly	28

Who plans your routes	%
Mostly office staff	51
Drivers decide jointly with office staff	38
Drivers decide themselves	11

Q9) How far in advance are your buses/coaches' routes and schedules organised: n = 112.

Q11) Who plans your buses/coaches' routes: n = 112.

Roadworks notice – bus/coach

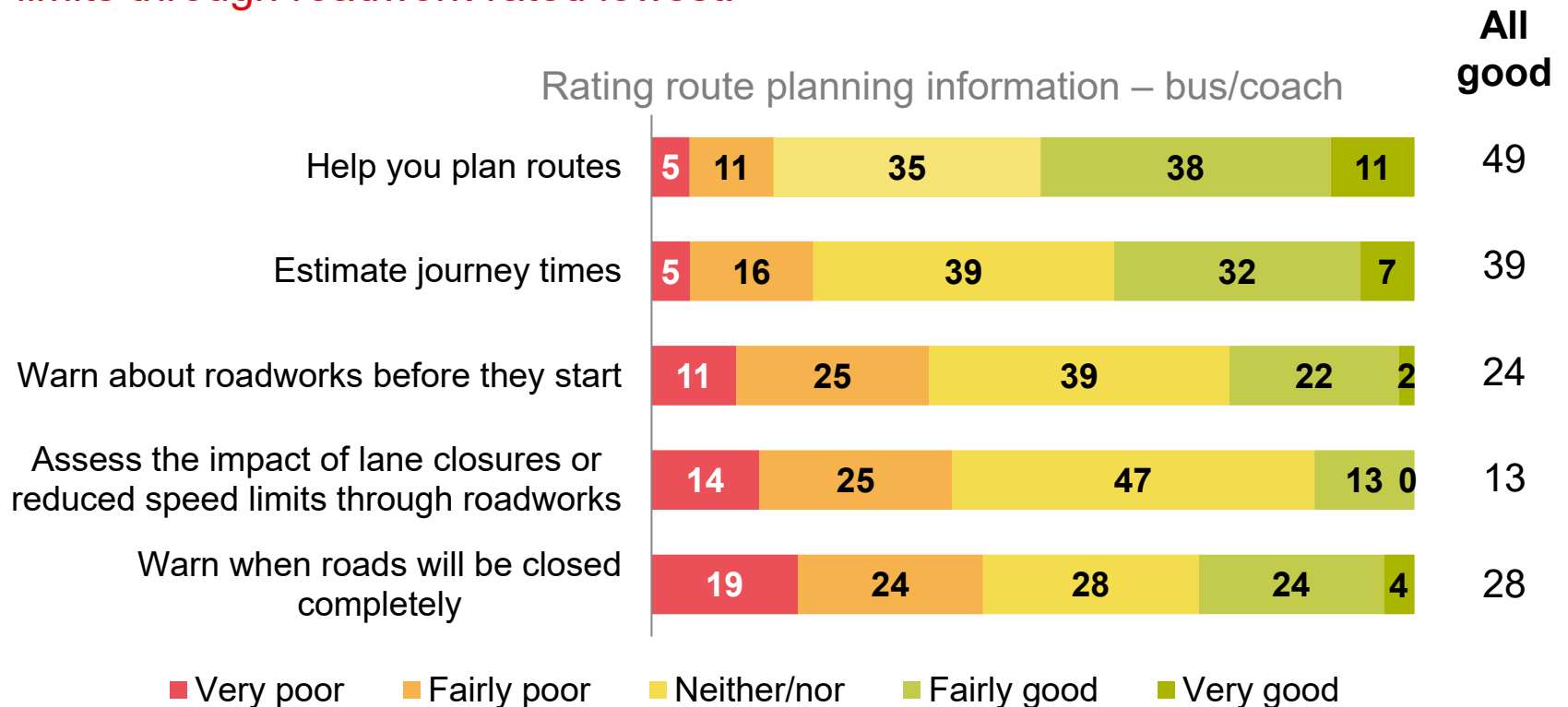
Most want to know about roadworks a few days to a week beforehand.

Roadworks minimum notice	%
At the beginning of the day	2
A few days before	32
A week to fortnight before	38
Around a month before	21
Around three months before	6
Not Important to know in advance	1

Q10) What is the minimum notice you need of where and when roadworks will take place on these roads: n = 112.

Route planning info – bus/coach

Information about assessing impact of lane closures and reduced speed limits through roadwork rated lowest.



Q12) When organising these routes/schedules, how do you rate the availability of information about these roads to.....: n = 100; 99; 99; 99 and 99 respectively.

Main planning information source – bus/coach

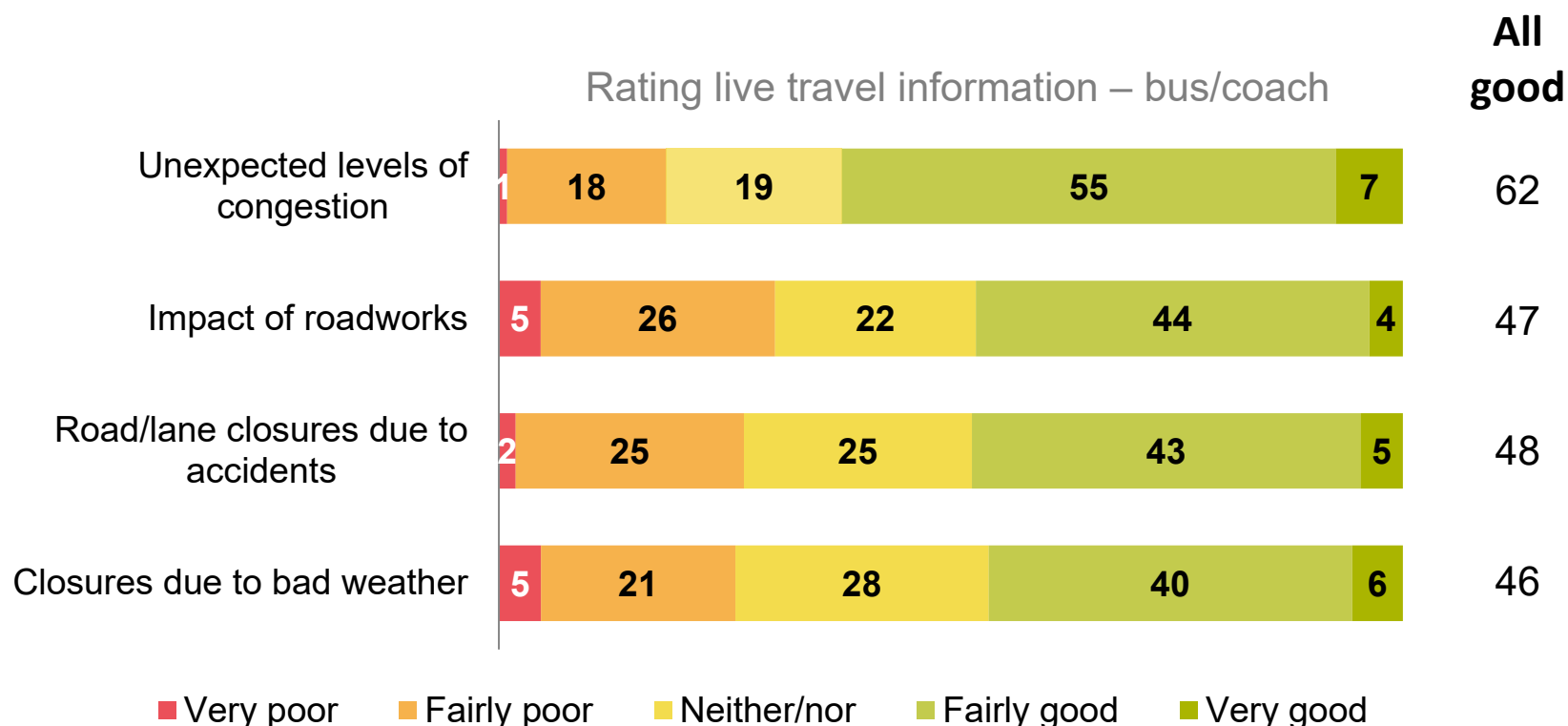
Just over four fifths felt their main planning information source accurate.

Accuracy of planning information	%
Very poor	1
Fairly poor	1
Neither good nor poor	14
Fairly good	67
Very good	16
Total good	84

Q14) And how do you rate the accuracy of information from this source: n = 97.

Live travel information bus/coach

Rated better than advance/planning information, especially congestion levels.



Q15) How do you rate 'live' network travel information in terms of telling you about....: n = 108; 107; 107 and 107 respectively.

Main live travel information source – bus/coach

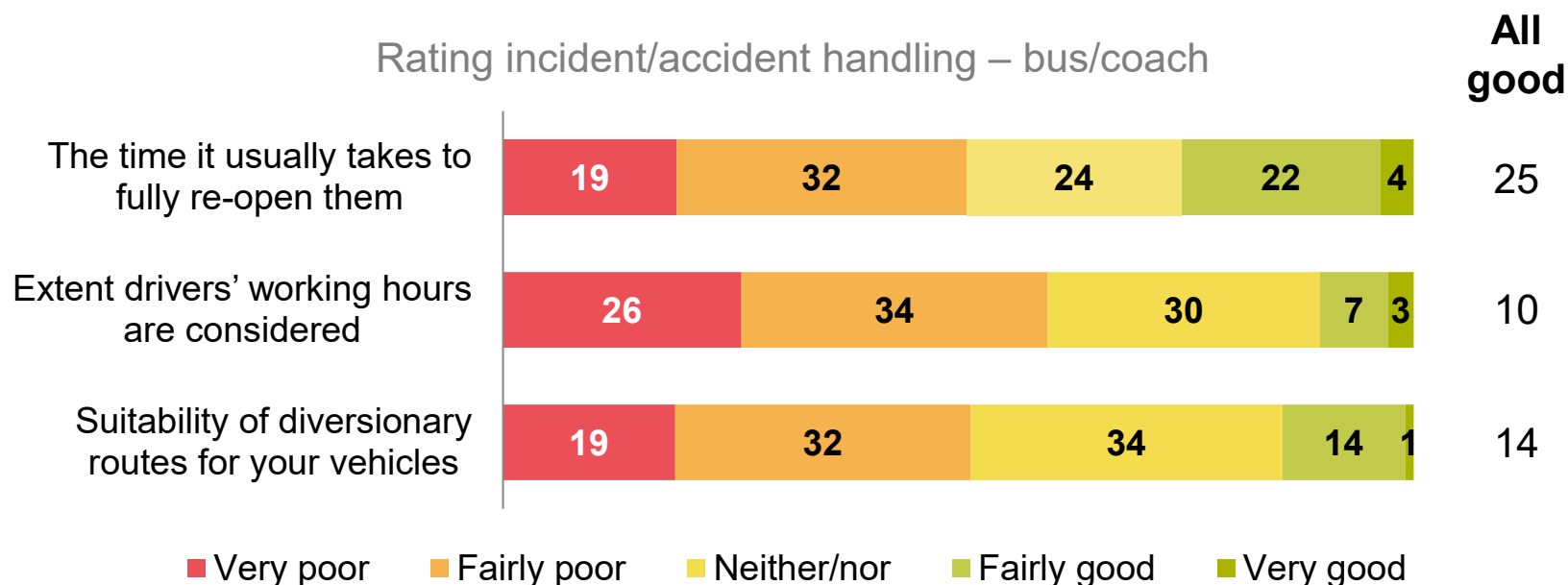
Fourth fifths felt their main on the day information source accurate.

Accuracy of on the day information	%
Very poor	1
Fairly poor	2
Neither good nor poor	14
Fairly good	75
Very good	8
Total good	83

Q17) And how do you rate the accuracy of information from this source: n = 107.

Incident/accident handling – bus/coach

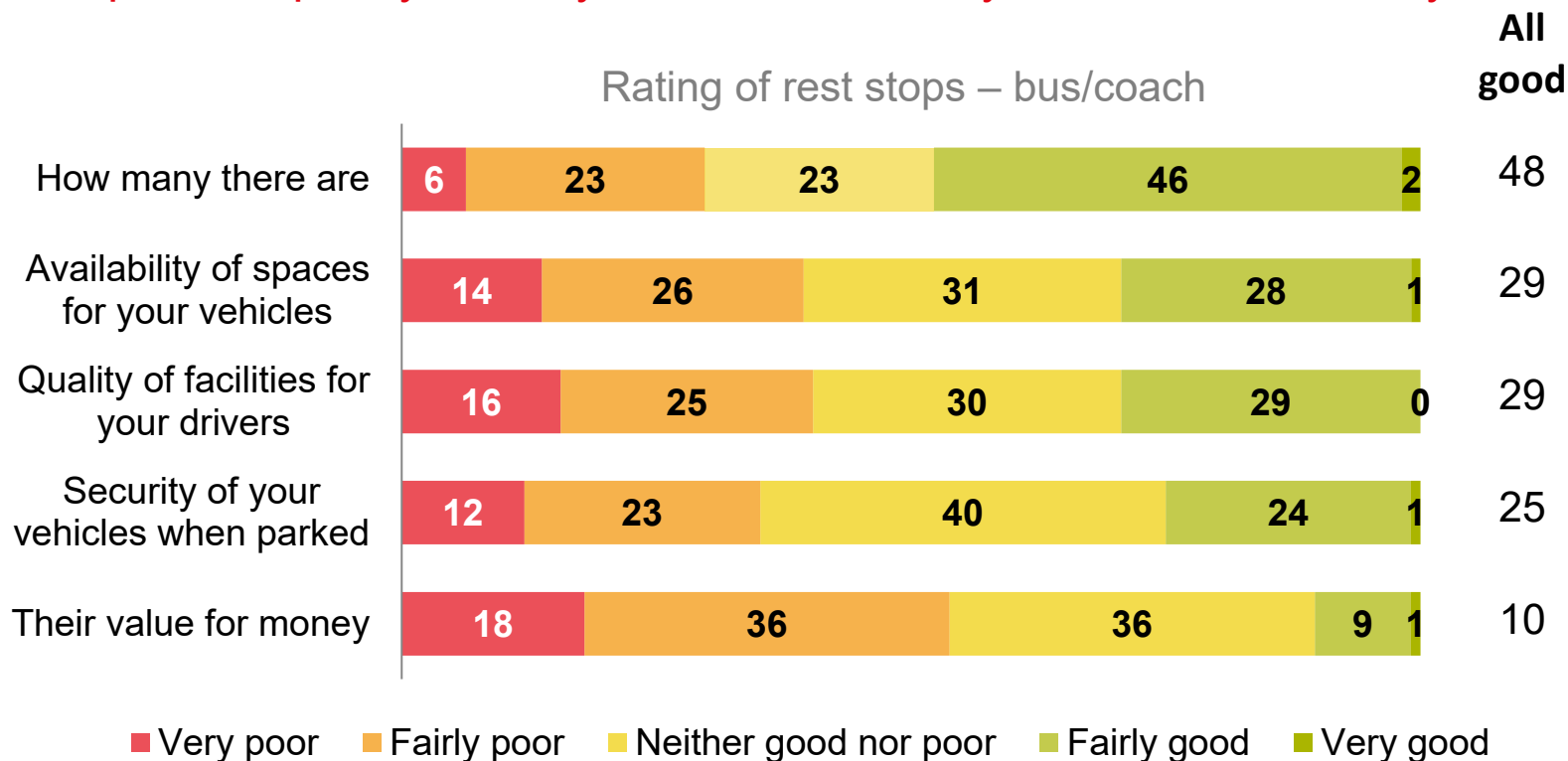
Significant level of poor rating.



Q19) From a business standpoint, how do you rate the handling of accidents and incidents on these roads in terms of....: n = 110; 107 and 111 respectively.

Rest stops – bus/coach

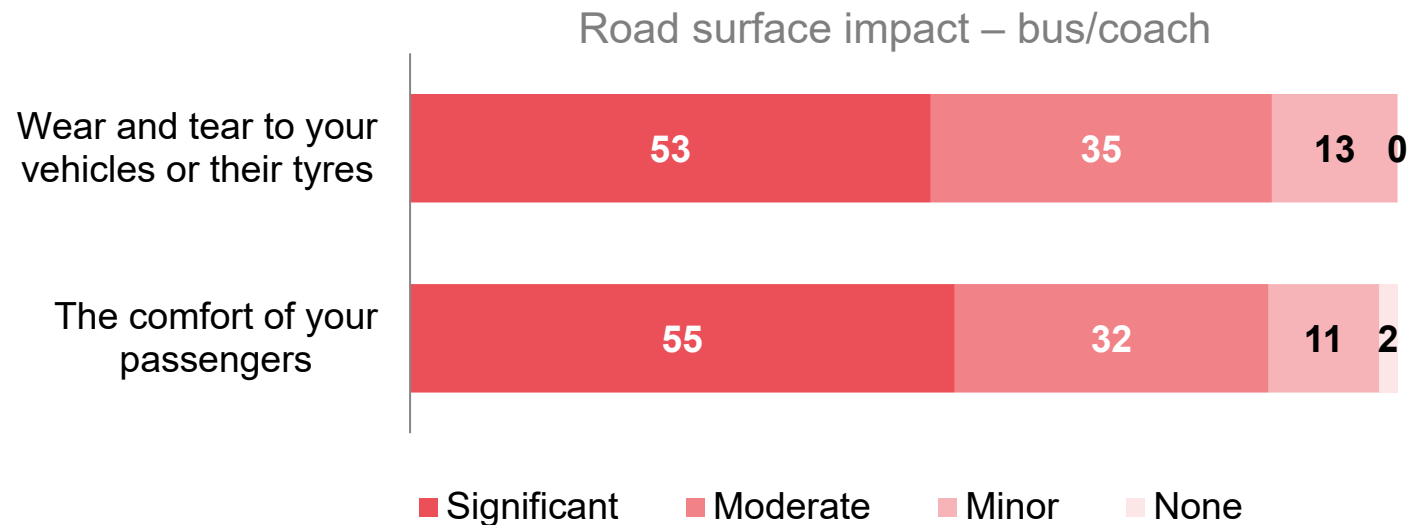
Rest stops rated poorly, notably on vehicle security and value for money.



Q20) Thinking about stopping places on these roads for your vehicles and drivers, from a business perspective, how do you rate the following: n= 111; 109; 109; 108 and 106 respectively.

Road surfaces – bus/coach

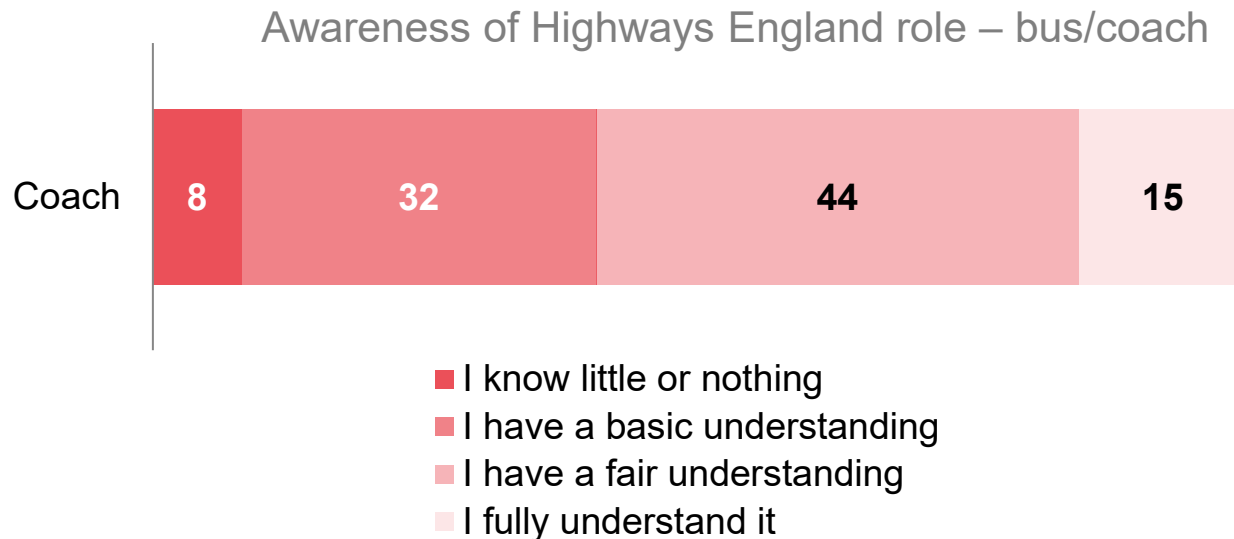
Road surfaces have a substantial impact on vehicle wear and tear and passenger comfort.



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.

Awareness of Highways England's role – bus/coach

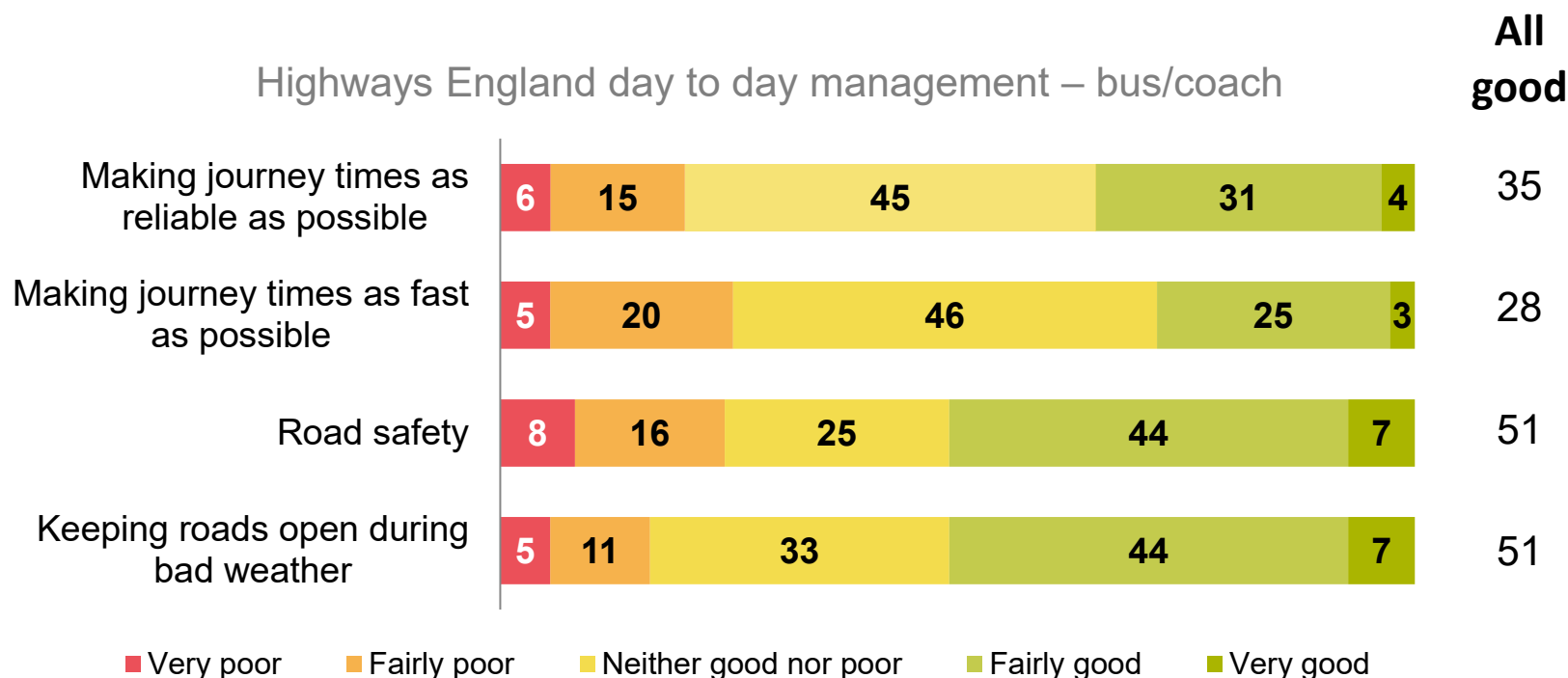
About three fifths have a fair or better understanding of Highways England's role.



Q22) How much do you feel you know about Highways England's role: n = 111.

Highways England's day to day management – bus/coach

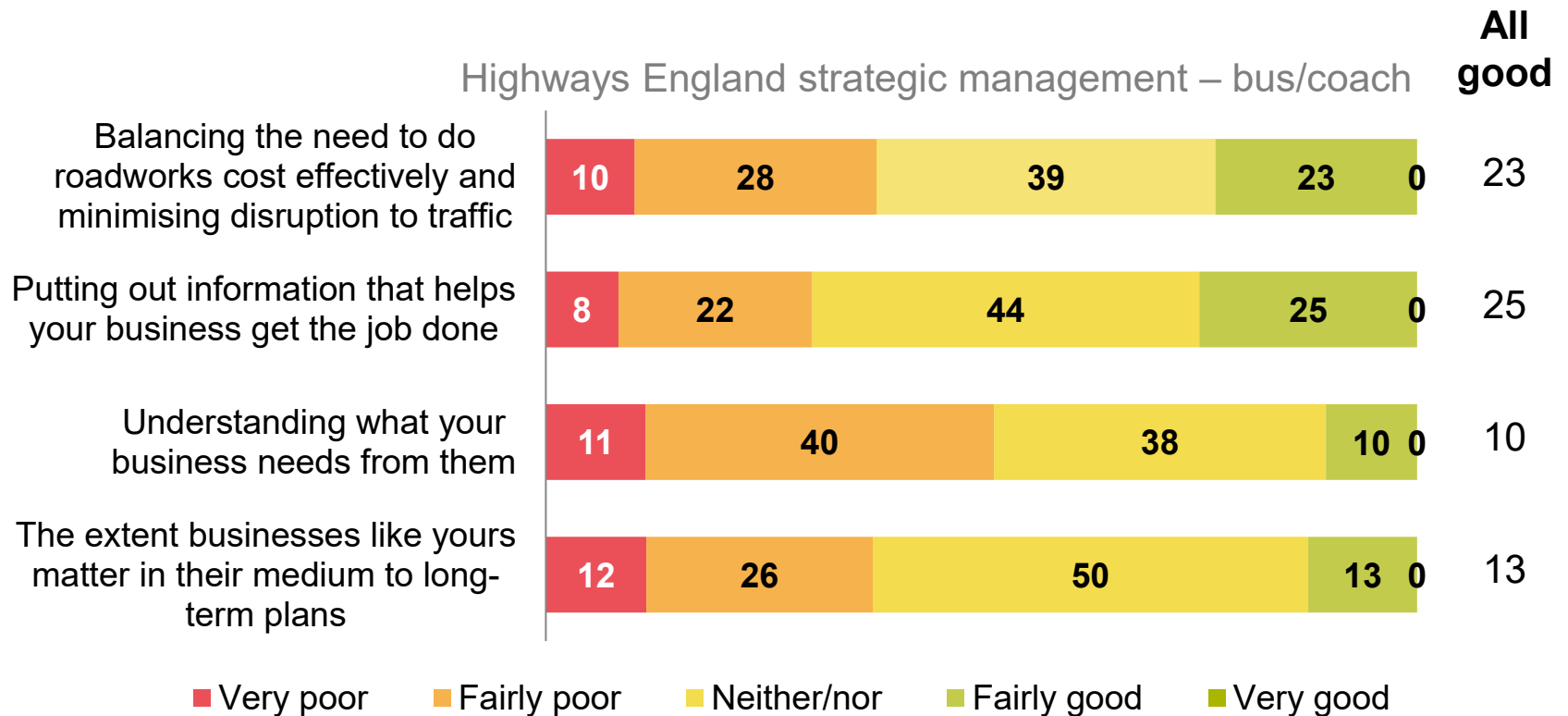
Safety and keeping roads open rated better, efforts to makes journeys as fast as possible lowest.



Q23) From a business standpoint, how do you rate Highways England's management of these roads in terms of....: n = 109; 110; 110 and 110 respectively.

Highways England strategic management – bus/coach

Understanding their business needs and how much they feel they matter in Highways England's plans are rated lowest.



Q24) How do you rate Highways England in respect of: (n circa 100).

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All survey results

Note: freight constitutes 95 per cent and bus/coach 5 per cent of all survey results

Note: 'All satisfied' and 'All good' are the whole number rounded sums of their constituent values with decimal places. Constituent values are shown as rounded whole numbers. Sometimes it looks like there is a one point difference if summing rounded constituent values to its 'all satisfied' or 'all good' value (e.g. 40.49% + 2.38% round to 40% and 2%; the sum of 42.87 rounds to 43%)

Who responded – all survey

Around three quarters use SRN daily

Frequency of SRN use	%
Every weekday	95
A few weekdays	4
Around once a week	1

Over half of journeys over 5 hours

Time on SRN typically	%
No typical length	14
Up to 1 hour	2
1 to 3 hours	9
3 to 5 hours	20
Over 5 hours	54

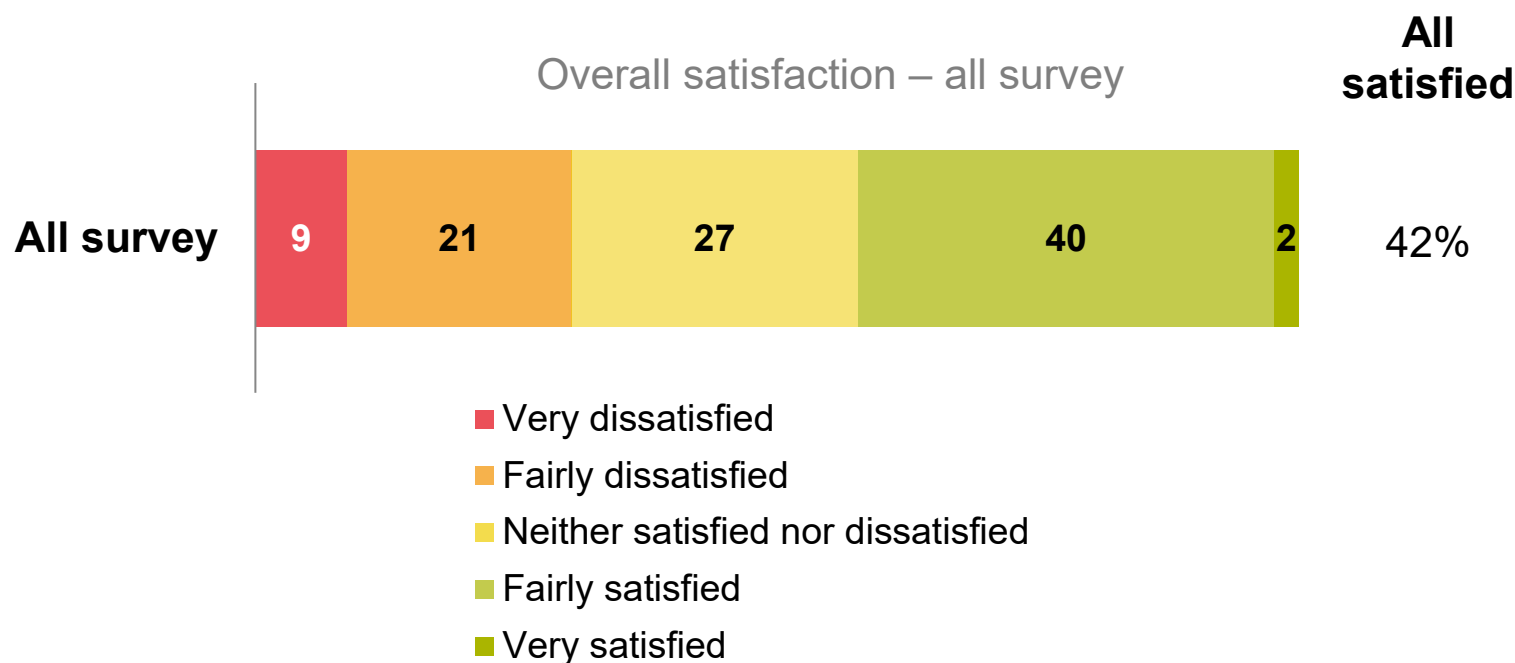
Nearly two thirds have arrival windows of thirty minutes or less

Arrival time flexibility	%
None	9
15 minutes	15
30 minutes	33
1 hour	25
2 hours	7
Less time critical than that	12

Q5) On average, how often do your lorries [bus/coaches] use these roads: n = 525. Q6) How long, typically, would your lorries [bus/coaches] spend on these roads when they use them: n = 523. Q8) When your lorries [bus/coaches] use these roads, how much flexibility do they usually have on their arrival time: n = 525.

Overall satisfaction – total survey

Overall satisfaction is 42 per cent. Three in 10 are 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.

How far ahead routes are schedule/planned – all survey

Most schedules/routes planned on the day or a few days in advance.

Office staff involved in majority of route planning.

How ahead schedules organised	%
On the day	34
A few days before	46
A week to fortnight before	5
Around a month before	1
Around three months before	1
Longer ahead than that	2
It varies significantly	10

Who plans your routes	%
Mostly office staff	55
Drivers decide jointly with office staff	34
Drivers decide themselves	12

Q9) How far in advance are your lorries [bus/coaches'] routes and schedules organised: n = 524.

Q11) Who plans your lorries [bus/coaches'] routes: n = 525.

Roadworks notice – all survey

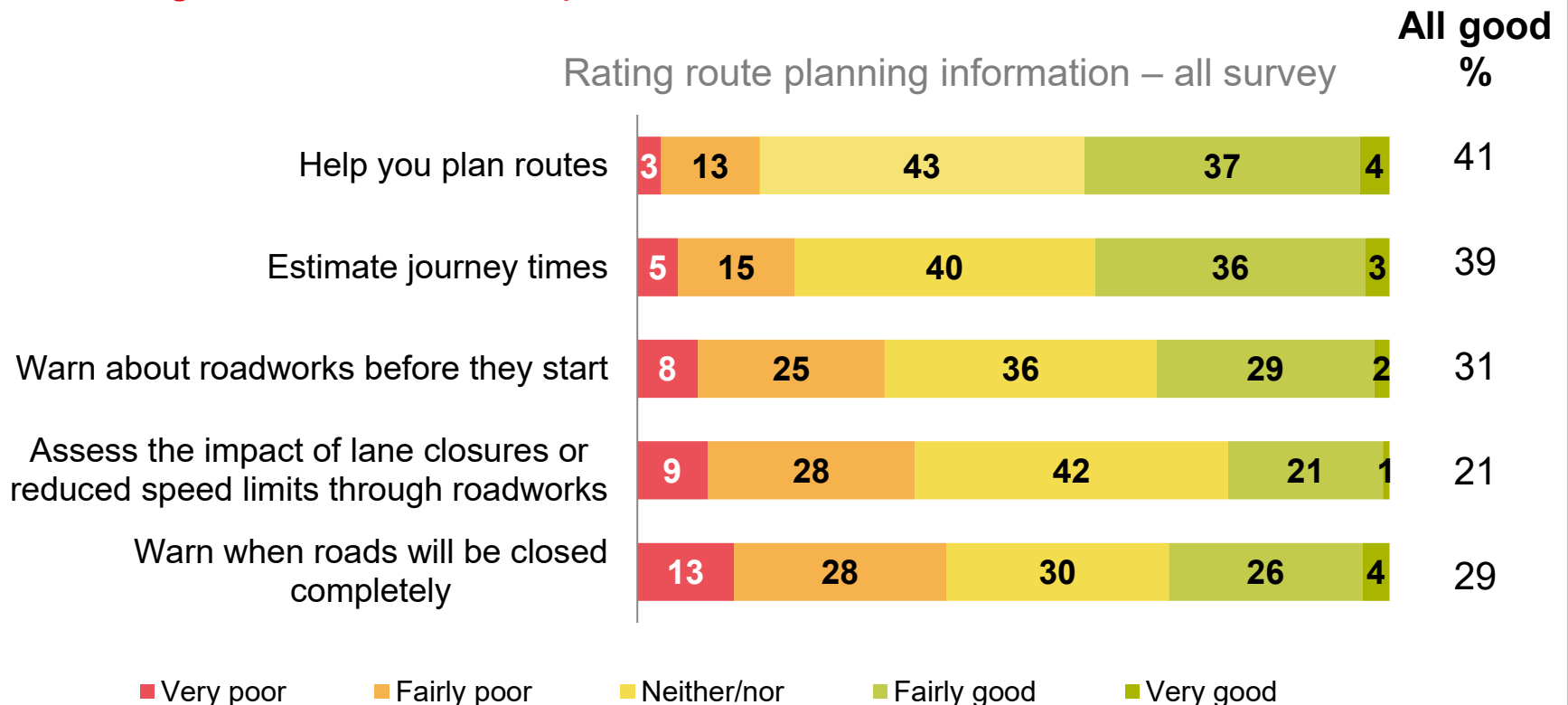
Most want to know about roadworks a few days to a week beforehand.

Roadworks minimum notice	%
At the beginning of the day	13
A few days before	48
A week to fortnight before	28
Around a month before	7
Around three months before	1
Not Important to know in advance	3

Q10) What is the minimum notice you need of where and when roadworks will take place on these roads: n = 525.

Route planning information – all survey

Warning of lanes shut/low speeds rated lowest.



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.

Main planning information source – all survey

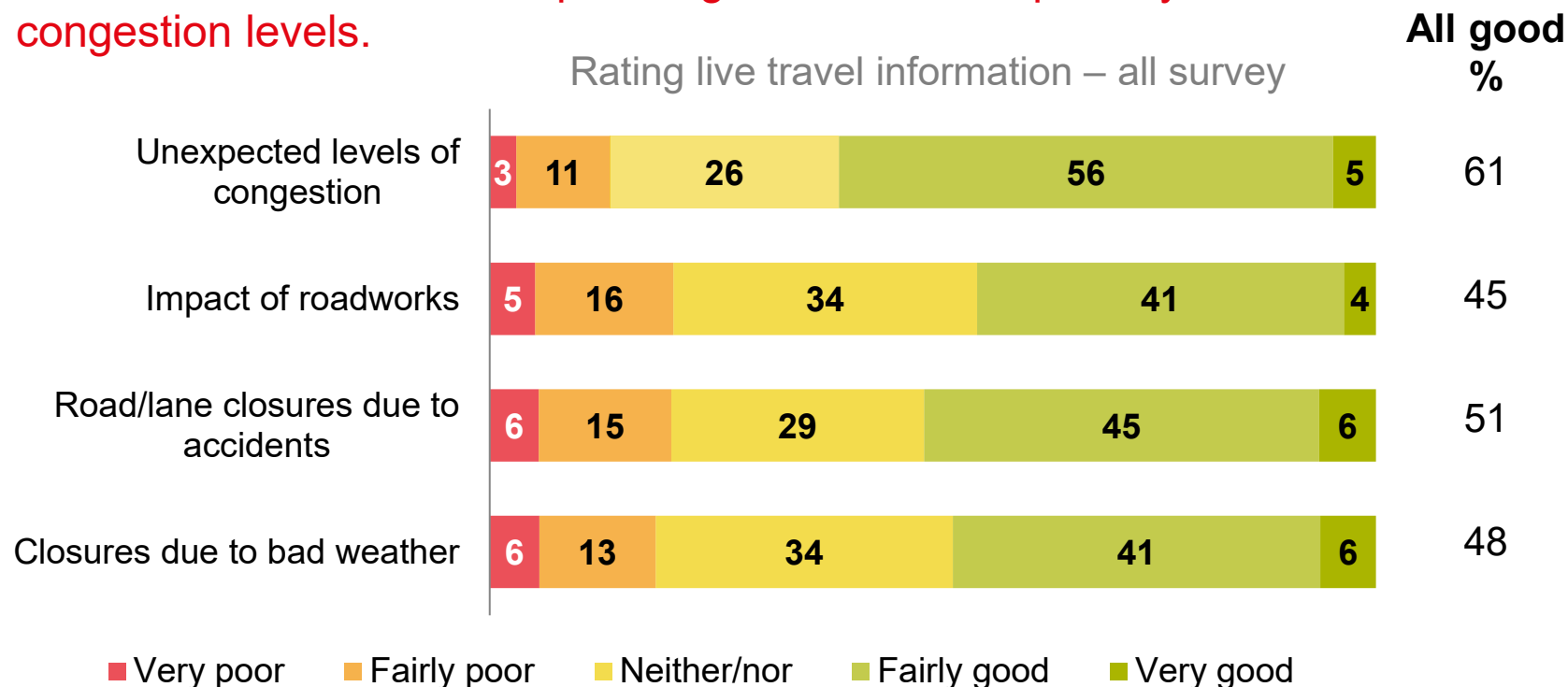
Just over three quarters felt their main planning information source accurate.

Accuracy of planning information	%
Very poor	1
Fairly poor	2
Neither good nor poor	22
Fairly good	62
Very good	15
Total good	76

Q14) And how do you rate the accuracy of information from this source: n = 452.

Live travel information – all survey

Rated better than advance/planning information, especially congestion levels.



Q15) How do you rate “live” network travel information in terms of telling you about....:
 n = 500; 500; 500; and 500 respectively.

Main live travel information source – all survey

Fourth fifths felt their main on the day information source accurate.

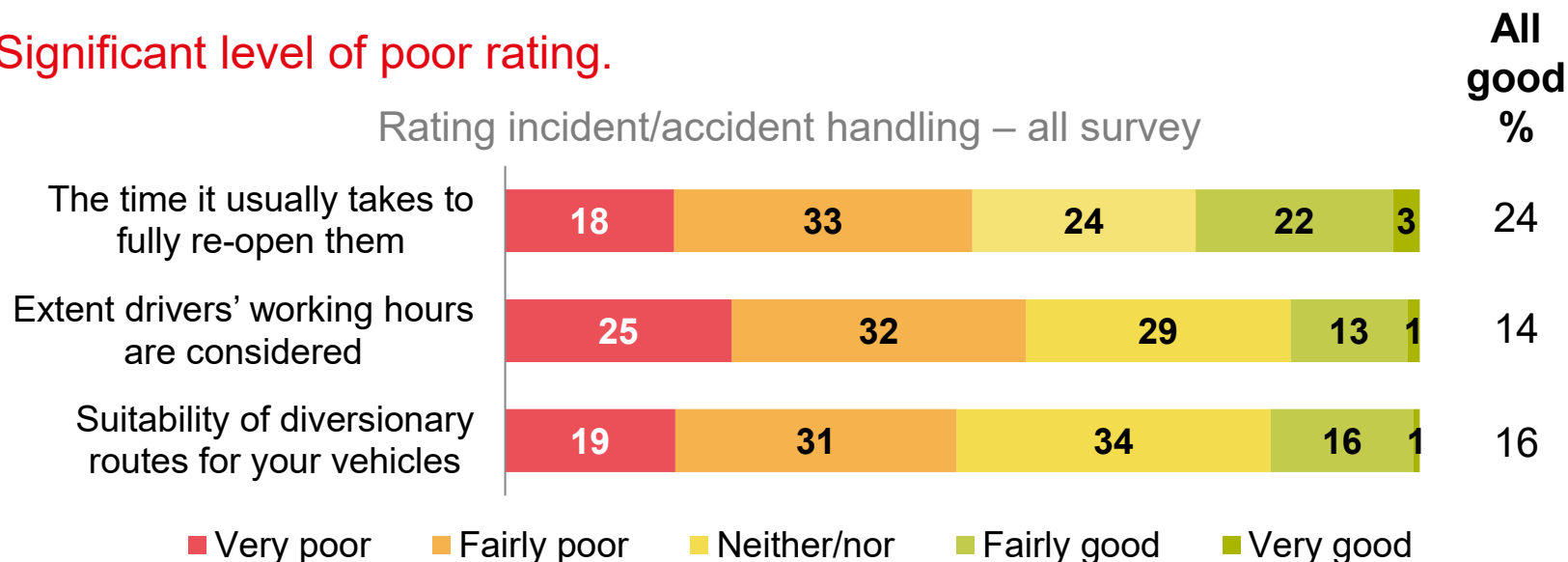
Accuracy of on the day information	%
Very poor	1
Fairly poor	2
Neither good nor poor	17
Fairly good	67
Very good	13
Total good	80

Q17) And how do you rate the accuracy of information from this source: n = 497.

Incident/accident handling – all survey

Significant level of poor rating.

Rating incident/accident handling – all survey



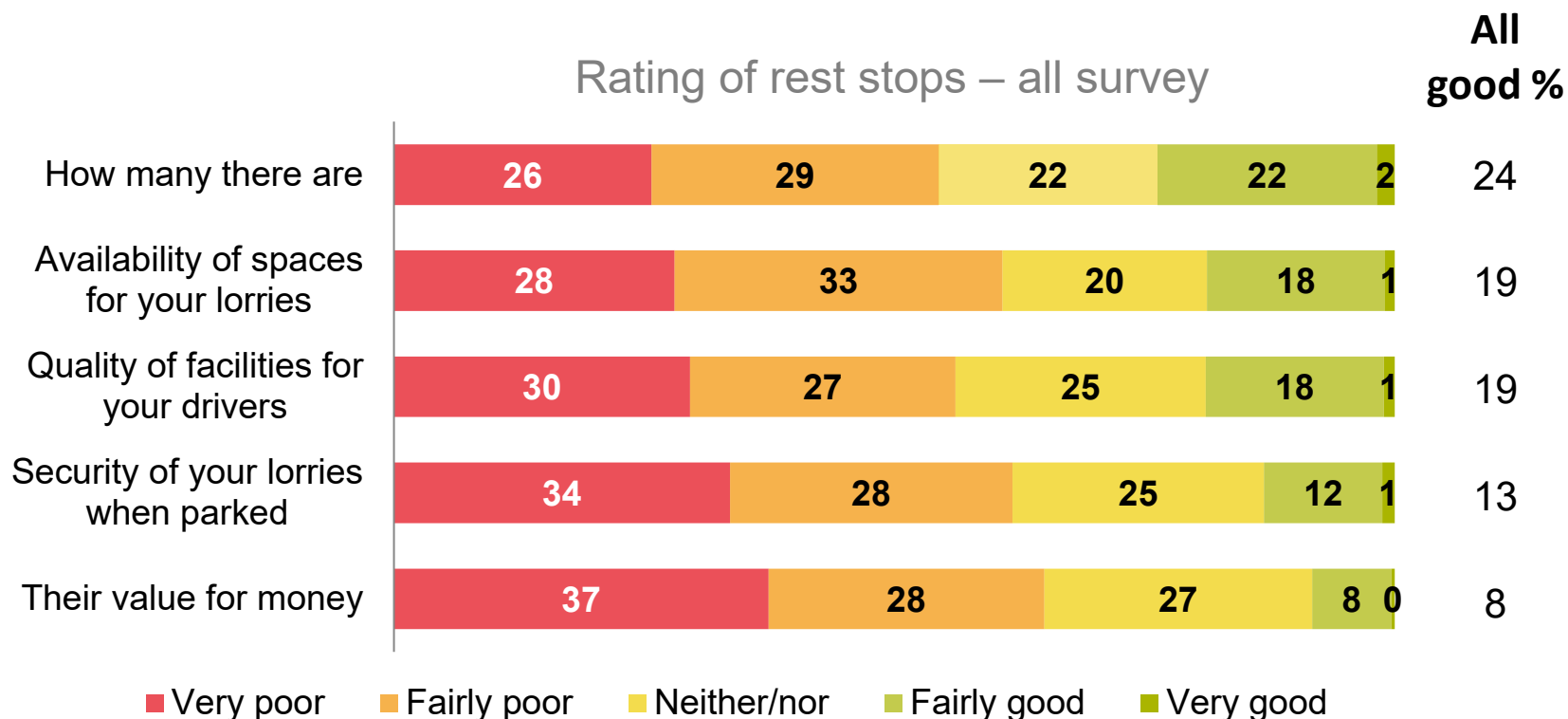
Drivers have a substantial role on on-road diversions.

Who controls on road diversions	%
A mix according to circumstances	43
Driver(s)	43
Manager(s) in office	13
Routing software	1

Q19) From a business standpoint, how do you rate the handling of accidents and incidents on these roads in terms of....: n = 519; 503; and 511 respectively. Q18) Who controls your response to on-road diversions or disruptions: n = 525.

Rest stops – all survey

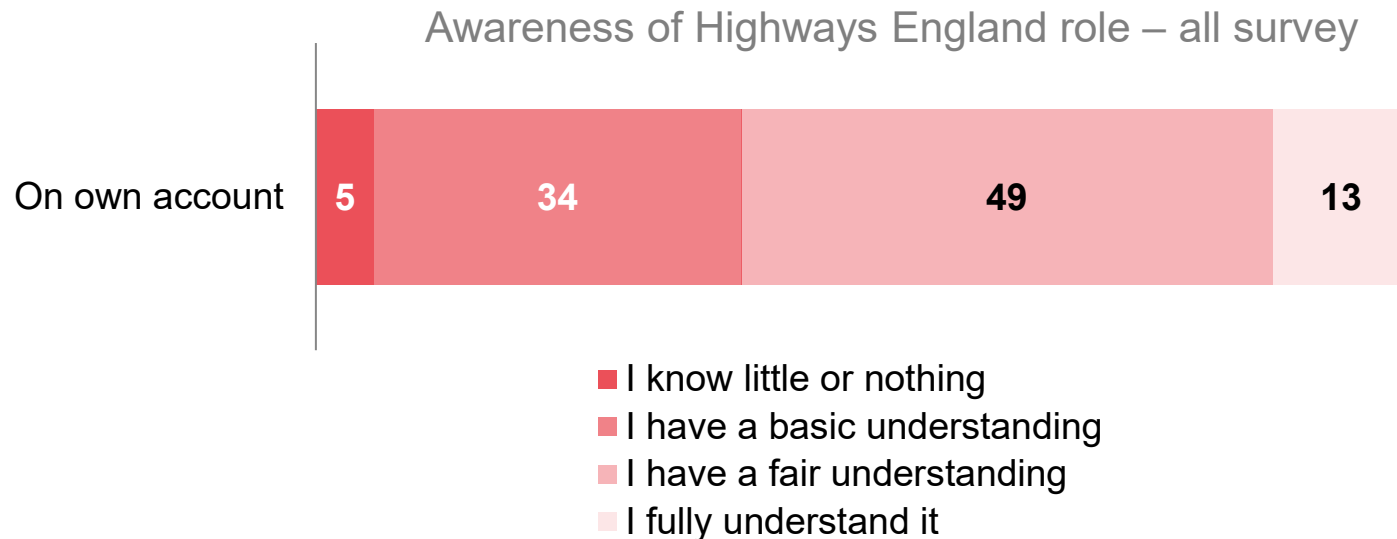
Rest stops rated poorly, notably on vehicle security and value for money.



Q20) Thinking about stopping places on these roads for your lorries [buses/coaches] and drivers, from a business perspective, how do you rate the following: n = 511; 513; 513; 507; and 497 respectively.

Awareness of Highways England's role – all survey

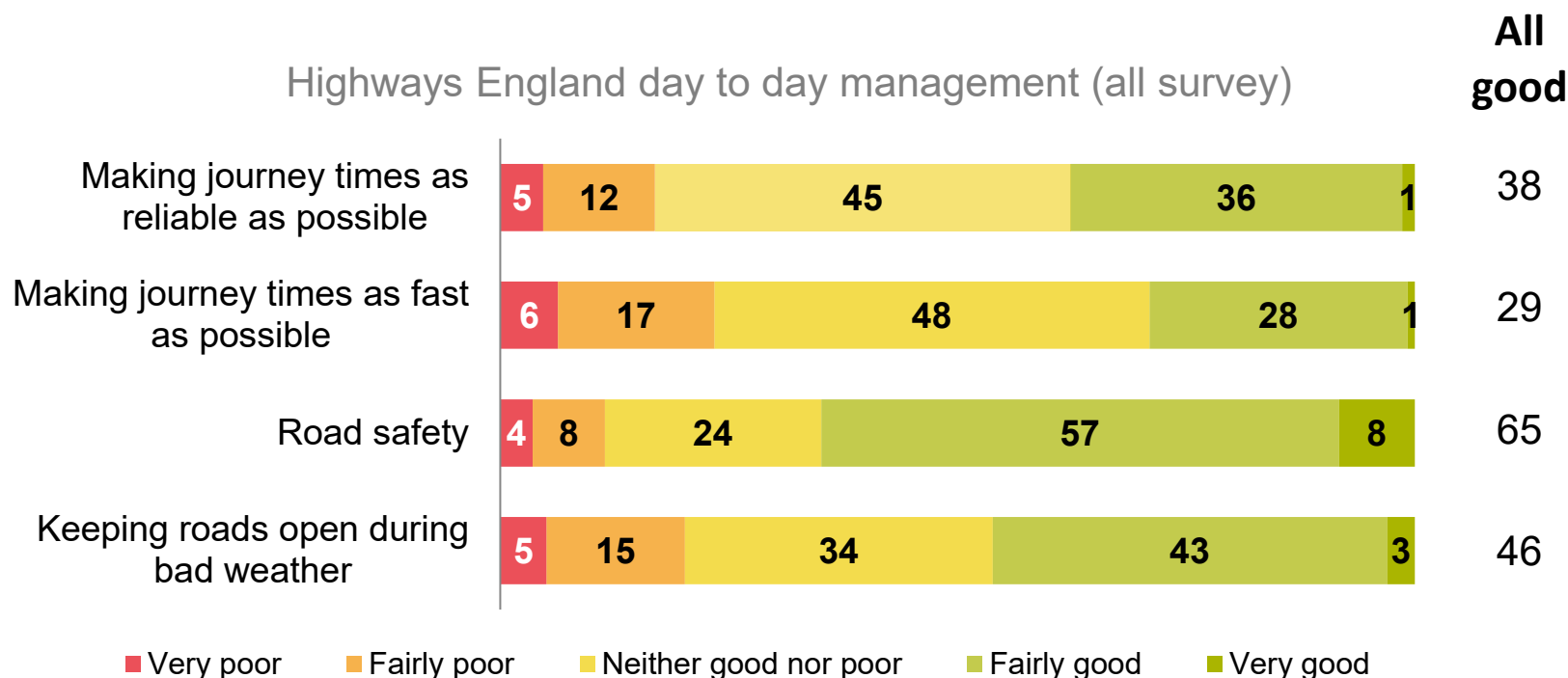
About two thirds have a fair or better understanding of Highways England's role.



Q22) How much do you feel you know about Highways England's role: n = 525.

Highways England's day to day management – all survey

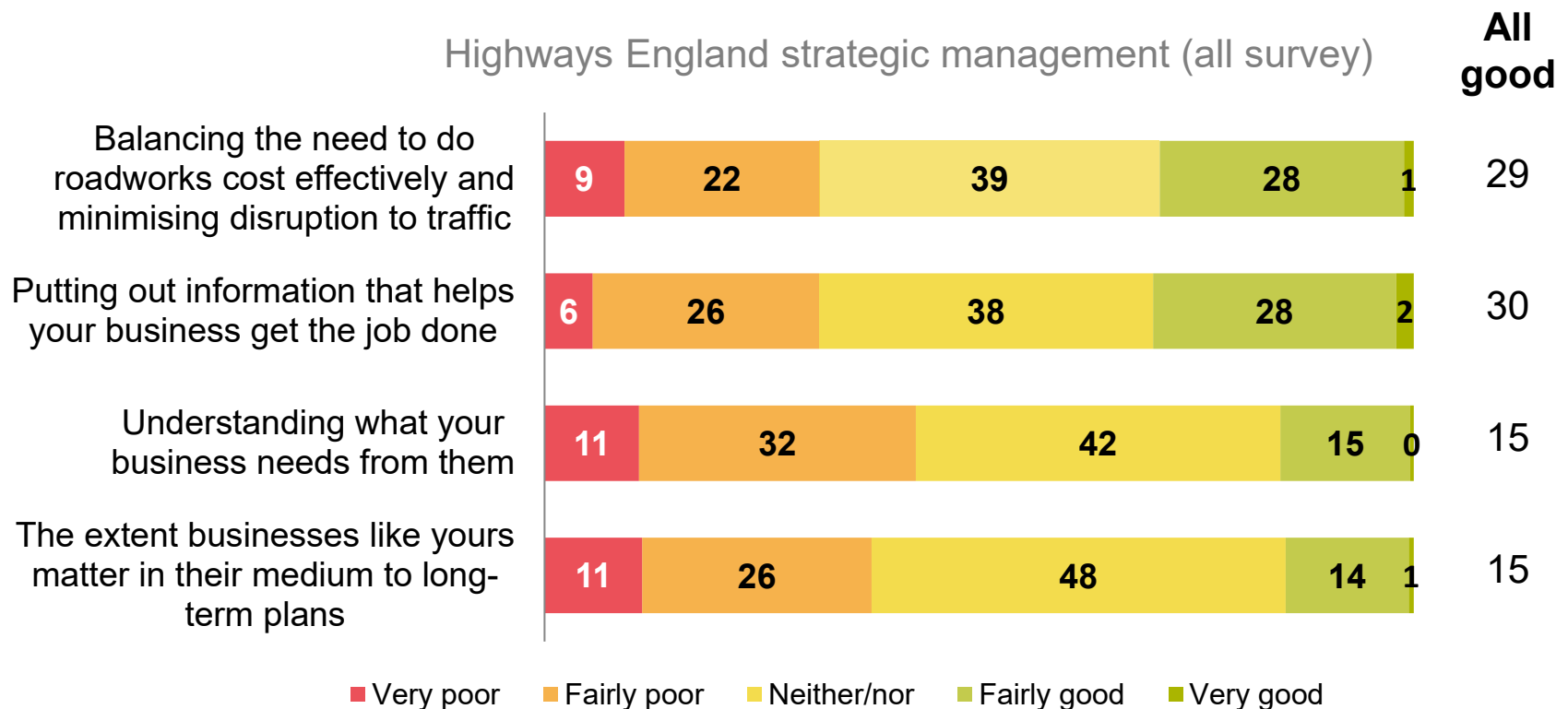
Safety and keeping roads open rated better, efforts to makes journeys as fast as possible lowest.



Q23) From a business standpoint, how do you rate Highways England's management of these roads in terms of..... n = 511; 513; 512 and 512 respectively.

Highways England strategic management – all survey

Understanding their business needs and how much they feel they matter in Highways England's plans are rated lowest.



Q24) How do you rate Highways England in respect of.....: n = 510; 514; 504 and 502 respectively.

Logistics and Coach Survey: Strategic Roads

Wave zero findings

Next steps

Conclusions and next steps

- Wave zero is further proof that the LCSSR is an effective survey and will produce the Performance Indicator required by the Road Investment Strategy.
- Transport Focus will:
 - a. Proceed with conducting wave one in October 2020, followed by wave two in February 2021. It will then be repeated in May, October and February of each subsequent year of Road Period 2.
 - b. Refine the questionnaire slightly in light of wave zero experience, consulting stakeholders before finalising.
 - c. Update the sampling methodology document and submit it formally for analytical assurance.
 - d. Publish headline findings from wave zero in summer 2020.