



Populus

M4 Smart Motorway Upgrade Project

March 2020 – Quantitative Stage (Wave 2)

Understanding road user awareness and knowledge

transport**focus** 

 **highways**
england

Contents

1. Background, approach and who we spoke to
2. M4 smart motorway upgrade and potential disruption
 - User satisfaction with journey
 - Awareness and level of understanding
 - Information channels
 - Perceived benefits and overall level of support
3. Key insights



This research was conducted by Populus Ltd, an independent market research agency

SECTION 1

Background, approach and who we spoke to

Detailed Methodology – Wave 2



Face-to-Face

MSA	Shifts	Road users interviewed
Chieveley	6	121
Cobham	6	109
Reading EB	3	50
Reading WB	3	55
Total	18	335

- Due to low footfall at Wave 1, MSA interviews did not take place at Heston this wave
- Membury (Welcome Break) chose not to participate this wave
- Wave 1 data has been re-calculated to reflect the new sample composition, excluding Heston (Moto) and Membury (Welcome Break)



Online Survey

Sample Type	Road users interviewed
Driver: London/South East*	393
Driver: Elsewhere*	352
<i>Driver Total</i>	<i>745</i>
Fleet Managers	201
Total	946

We report on a total base of drivers (**n=1080 (335 F2F + 745 online)**), and show fleet managers as a separate group due to their different profile. This wave, the main body of research was also supported by an **email invitation to subscribers of Highways England's M4 Smart Motorway Upgrade database** (65 completed), which is combined with the online panel sample (680), for total online driver sample of 745.

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

SECTION 2

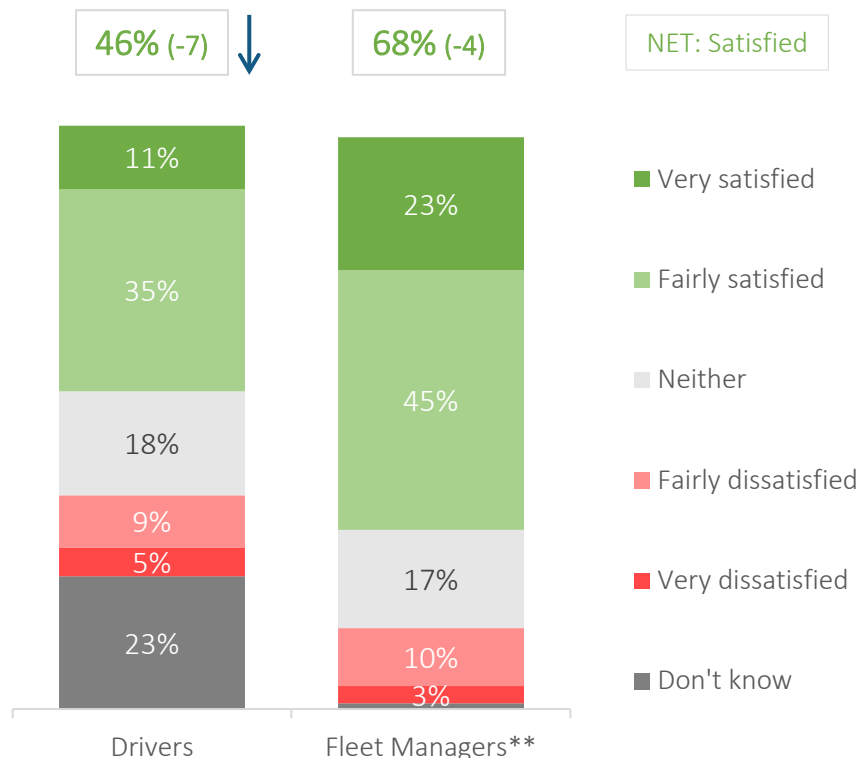
Journey satisfaction

Journey satisfaction

Satisfaction with their most recent journey has fallen significantly among drivers, in particular those most directly affected in the impacted area (e.g. Reading). Perceived satisfaction among fleet managers remains considerably higher than claimed satisfaction among HGV drivers

Based on all road users (Wave 2)

↕ Indicate significant difference to Wave 1 @ 95% confidence level

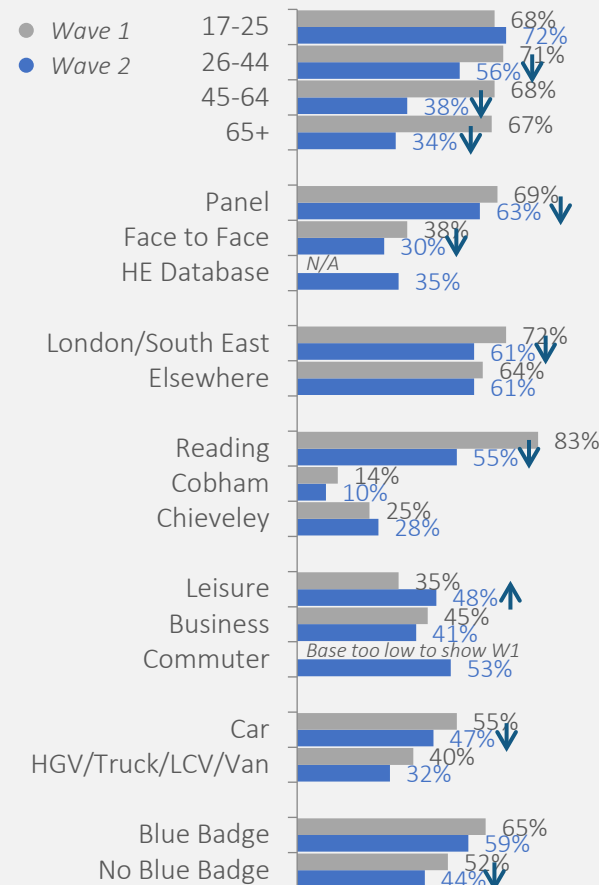


**Answering on behalf of their fleet drivers

Figures in brackets show change from Wave 1



% Satisfied with journey - Drivers



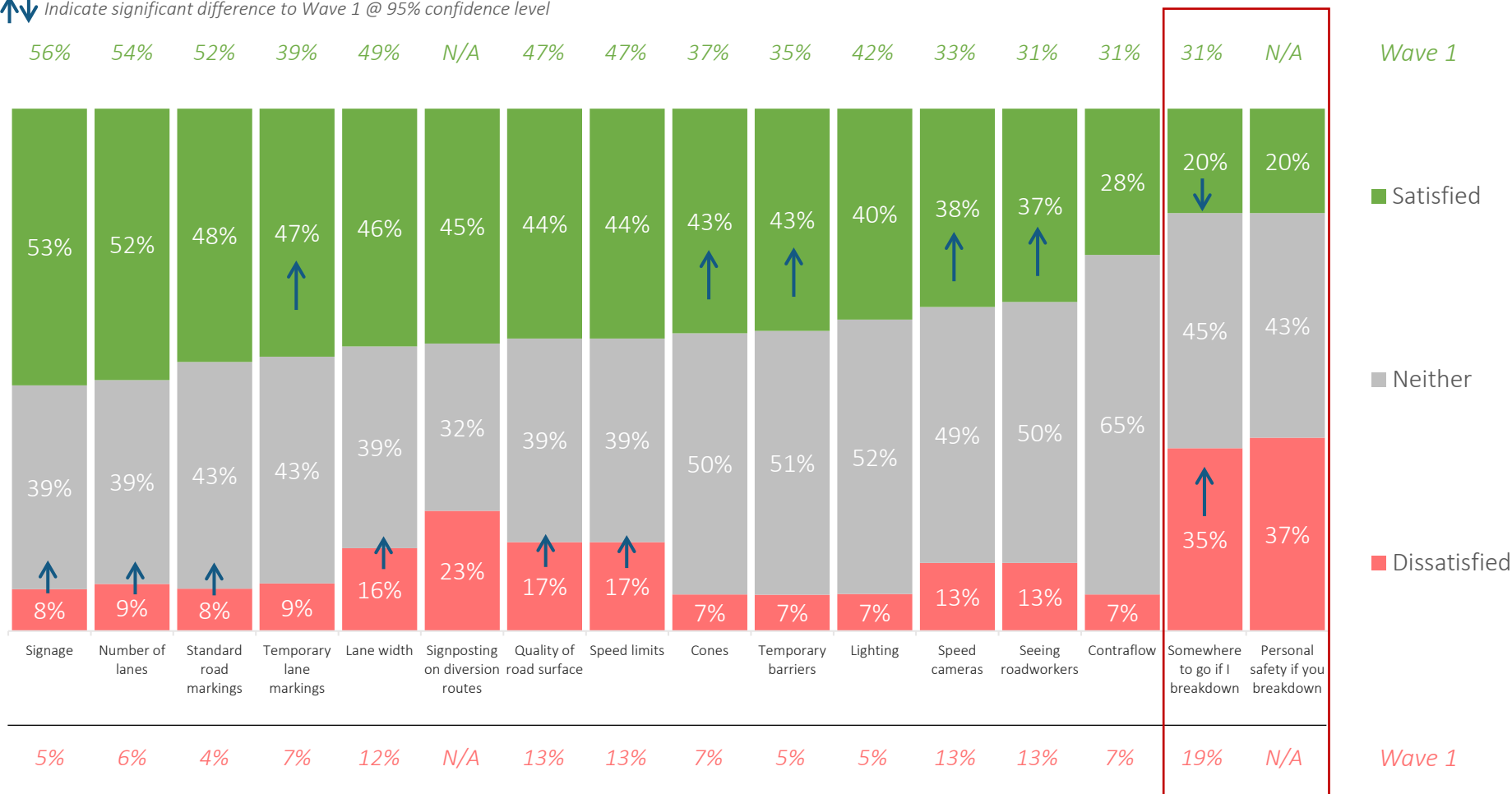
Q12. Overall, how satisfied or dissatisfied are you with your most recent experience travelling along the M4 between Junctions 3 and 12? Base: Wave 1/2, Drivers (803/1080) Fleet Managers (205/201) 17-25 (59/93) 26-44 (213/403) 45-64 (159/384) 65+ (78/200) Panel (509/680) Face to Face (294/335) HE Database (65) London/South East (304/393) Elsewhere (205/352) Reading (86/105) Cobham (103/109) Chieveley (105/121) Leisure (180/705) Business (73/168) Commuter (18/162) Car (716/973) HGV/Truck/LCV/Van (48/56) Blue Badge (86/116) No Blue Badge (710/950)

Satisfaction with elements of the M4 [Drivers]

Concern over where to go when broken down remains one of the biggest issues for drivers, with over a third now claiming to be dissatisfied with this feature of the M4

Based on all road users – Drivers (Wave 2)

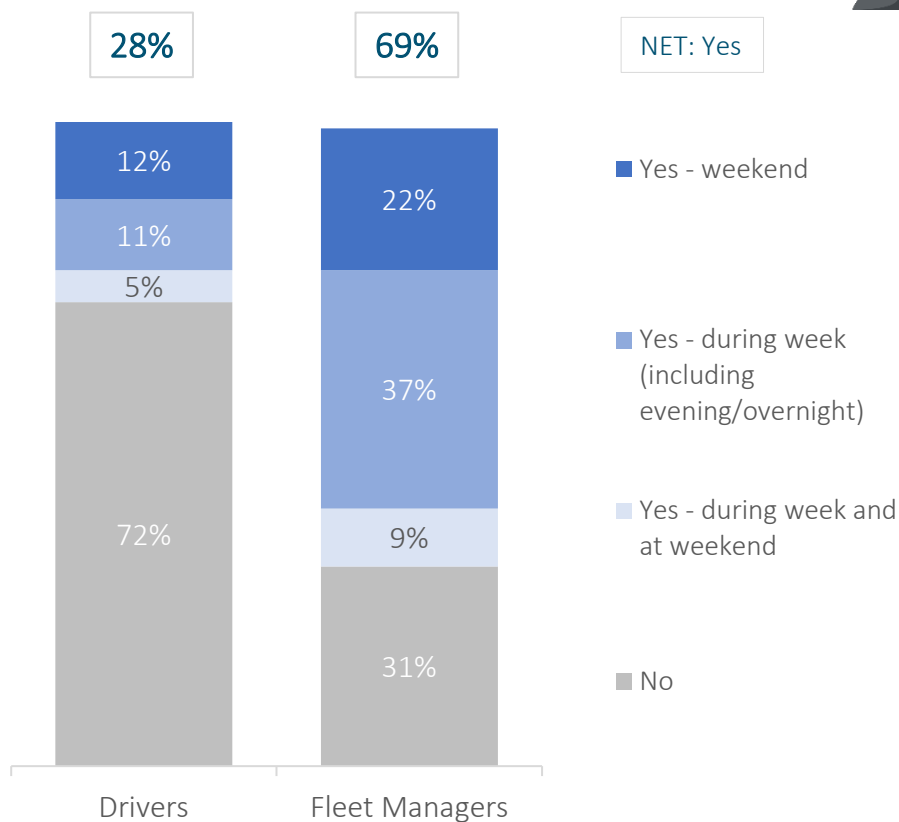
↕ Indicate significant difference to Wave 1 @ 95% confidence level



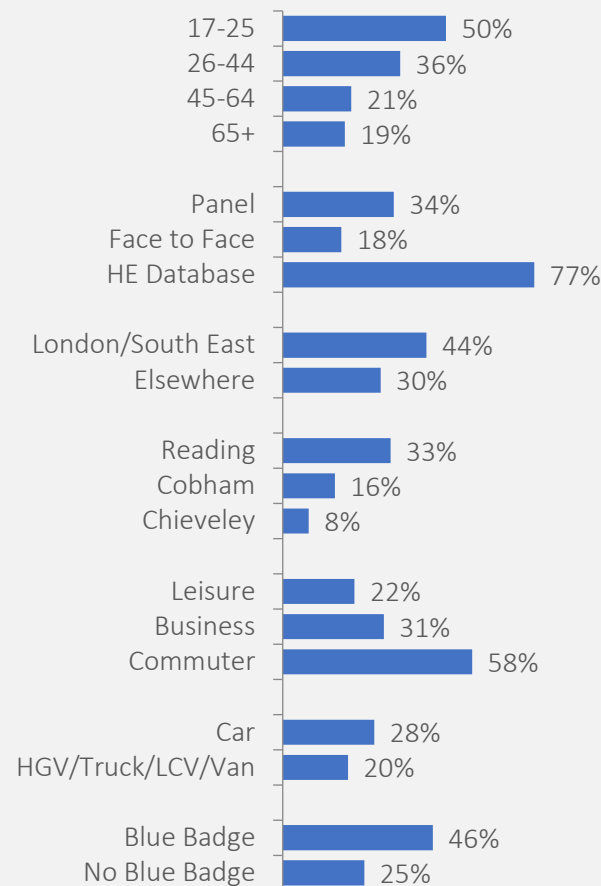
Experience of motorway closures and diversions

One in four drivers claim to have experienced a diversion so far, rising among those most likely to be in the affected area most often (London/SE and commuters). One in three fleet managers claim their fleet has experienced a diversion during the week

Based on all road users (Wave 2)



Experience diversion (% Yes) – Drivers



SECTION 3

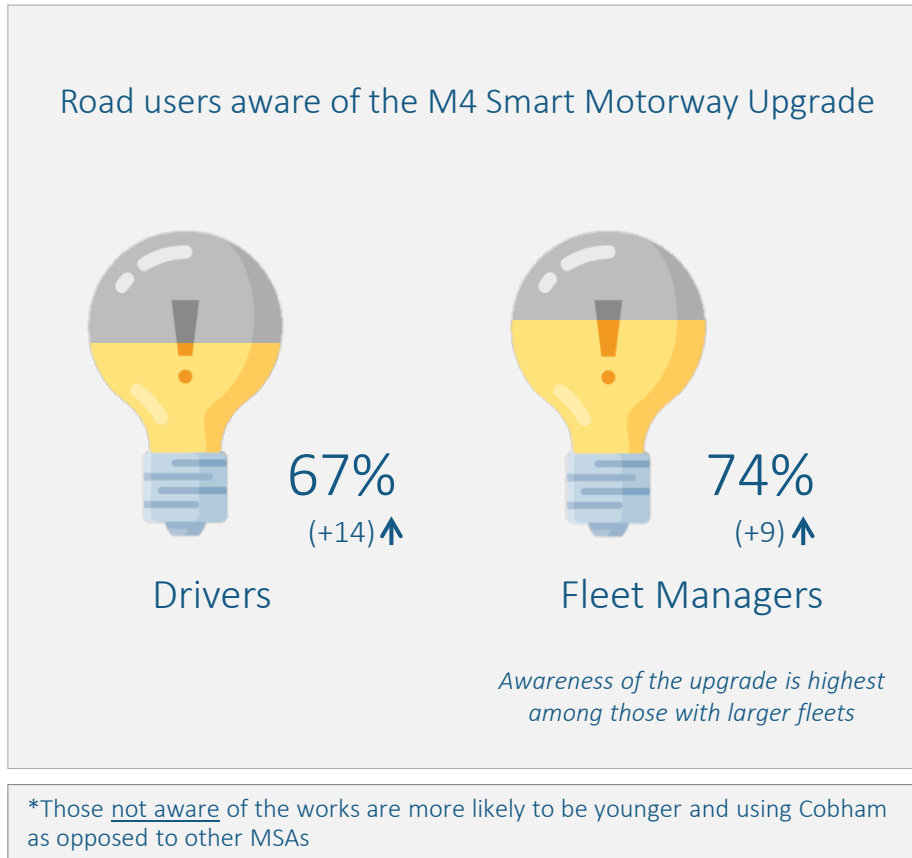
Awareness and level of understanding

Awareness of M4 smart motorway upgrade and potential disruption

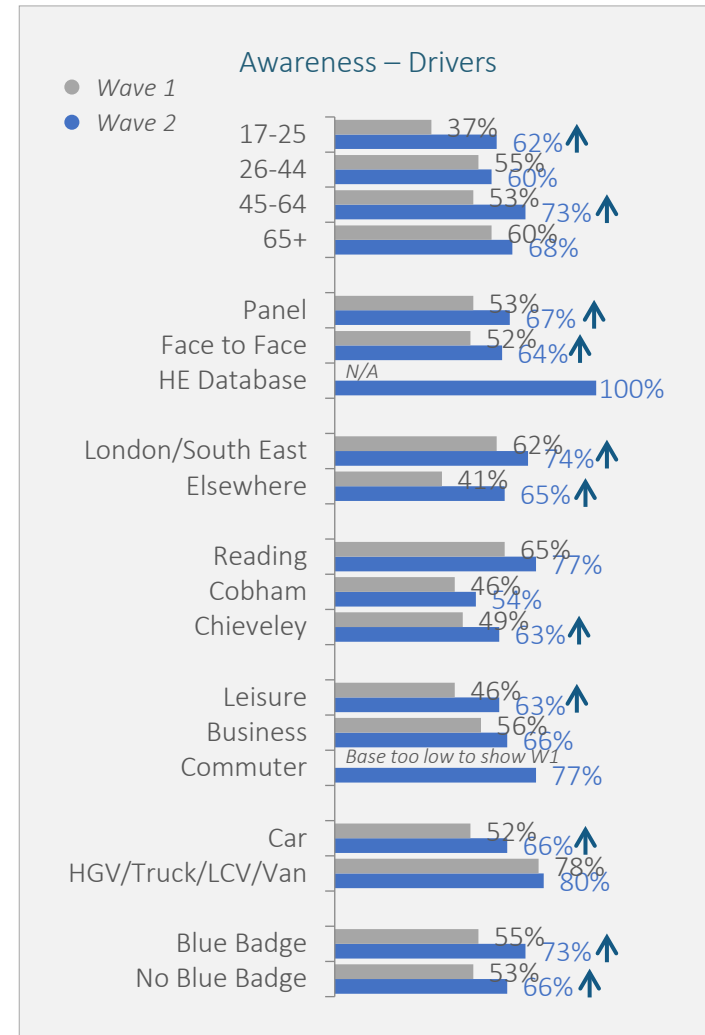
Awareness has risen significantly, especially among those travelling from further afield and younger drivers, suggesting comms are now reaching a wider audience. However, a third remain unaware

Based on all road users (Wave 2)

↕ Indicate significant difference to Wave 1 @ 95% confidence level



Figures in brackets show change from Wave 1

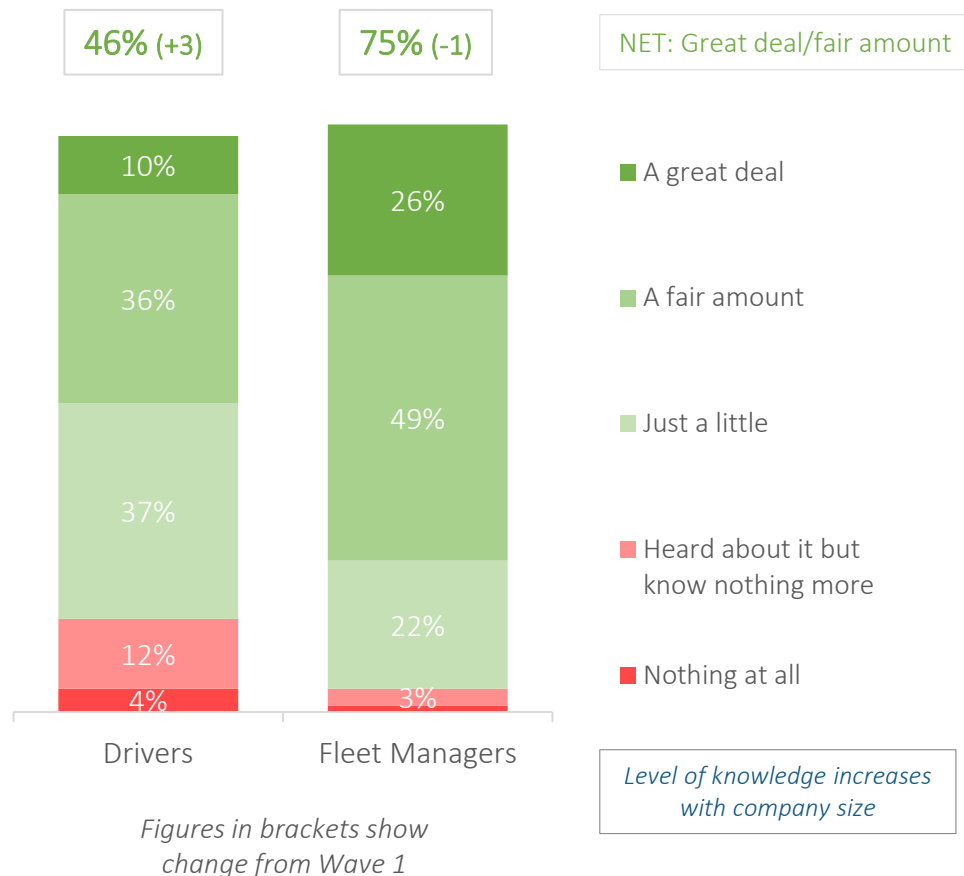


Level of knowledge about the upgrade

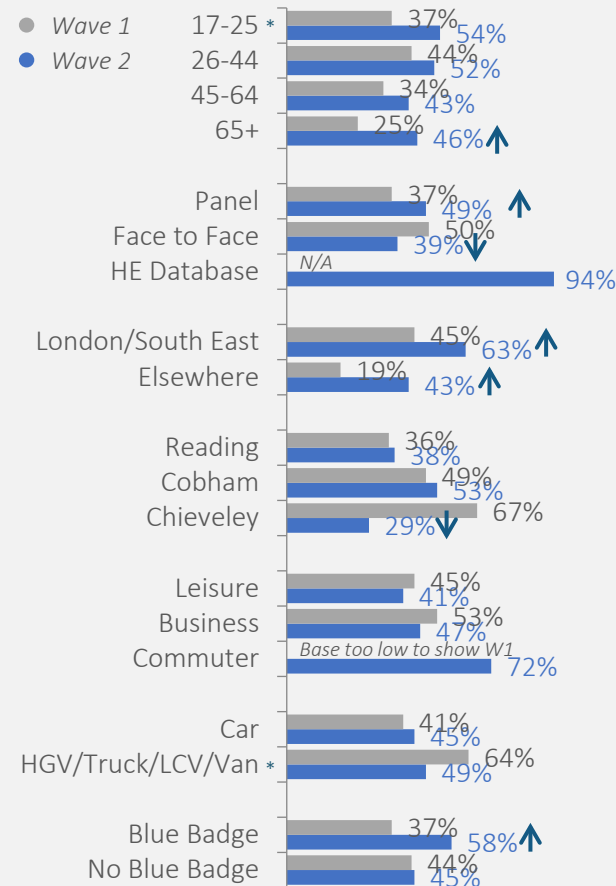
Fleet managers continue to be more knowledgeable about the works than drivers, though neither group has moved on this year. There is still room to strengthen how much people actually know about the works, potentially through the use of tailored comms at particular MSAs (e.g. Chieveley)

Based on all road users aware of upgrade (Wave 2)

↕ Indicate significant difference to Wave 1 @ 95% confidence level



Knowledge (% great deal/fair amount) – Drivers



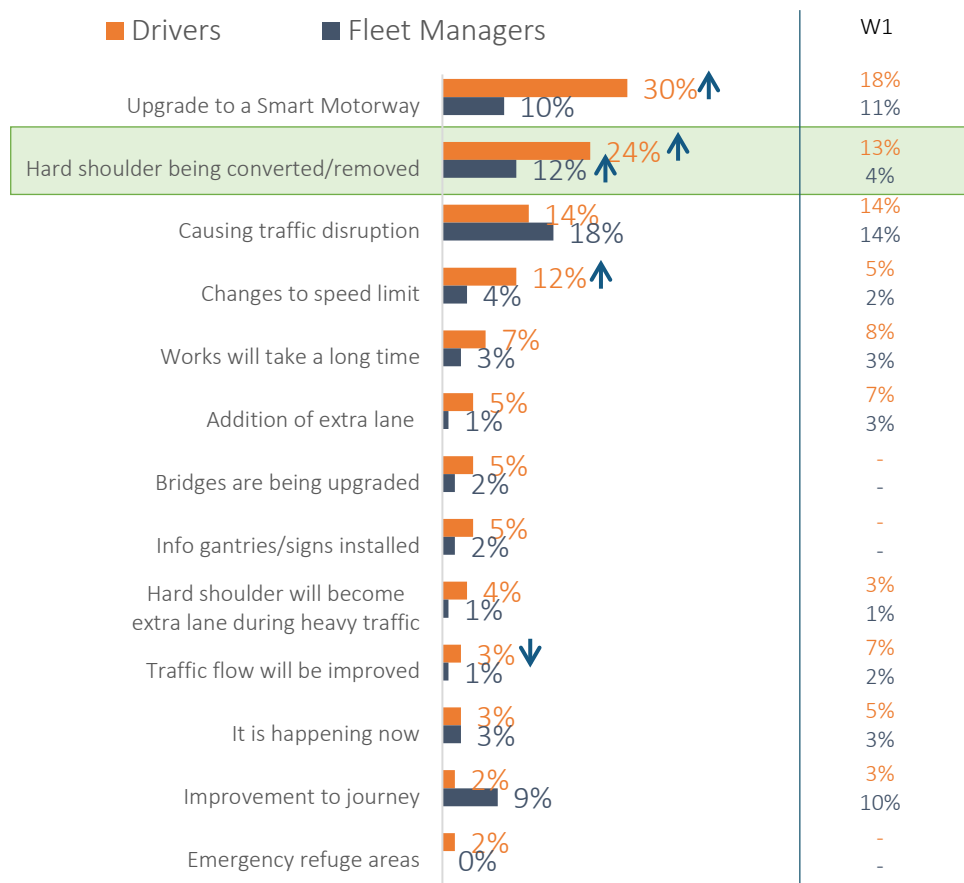
* Low base size

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

Removal/conversion of the hard shoulder has cut through more strongly this wave; though still minor, some still believe it will only be used during heavy traffic. Significantly more drivers are aware of the changes to speed limits this wave too

Based on all road users aware of upgrade (Wave 2)

↕ Indicate significant difference to Wave 1 @ 95% confidence level



“Project to convert to a smart motorway by **removing the hard shoulder and making it four lanes**. Seems to have been going on for a long time with 50 mph restrictions in place for long stretches of motorway”

Driver

“A smart motorway is a **section of motorway that uses active traffic management techniques to increase capacity** by use of variable speed limits and **hard shoulder running at busy times**”

Driver

“I believe this is the **longest section of smart motorway for road investment** in what will help **improve economic growth and employment at local and national level**, by tackling congestion and **improving journey times**”

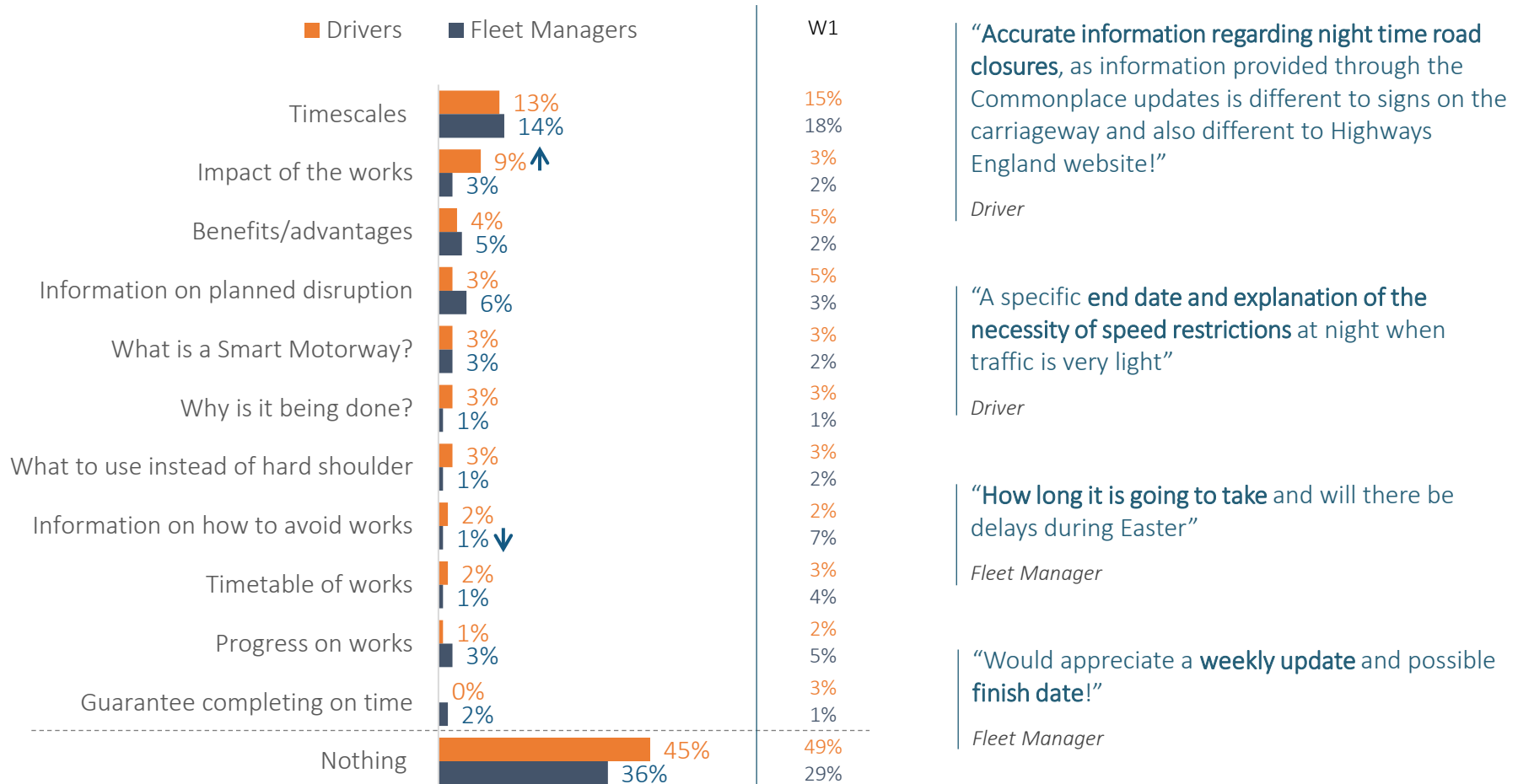
Fleet Manager

What more would like to know about the works [spontaneous – top mentions]

While still difficult to engage drivers on the topic, the key area of focus should remain timescales for the work. Some would also like to understand the impact they will feel during the upgrade

Based on all road users aware of upgrade (Wave 2)

↑↓ Indicate significant difference to Wave 1 @ 95% confidence level

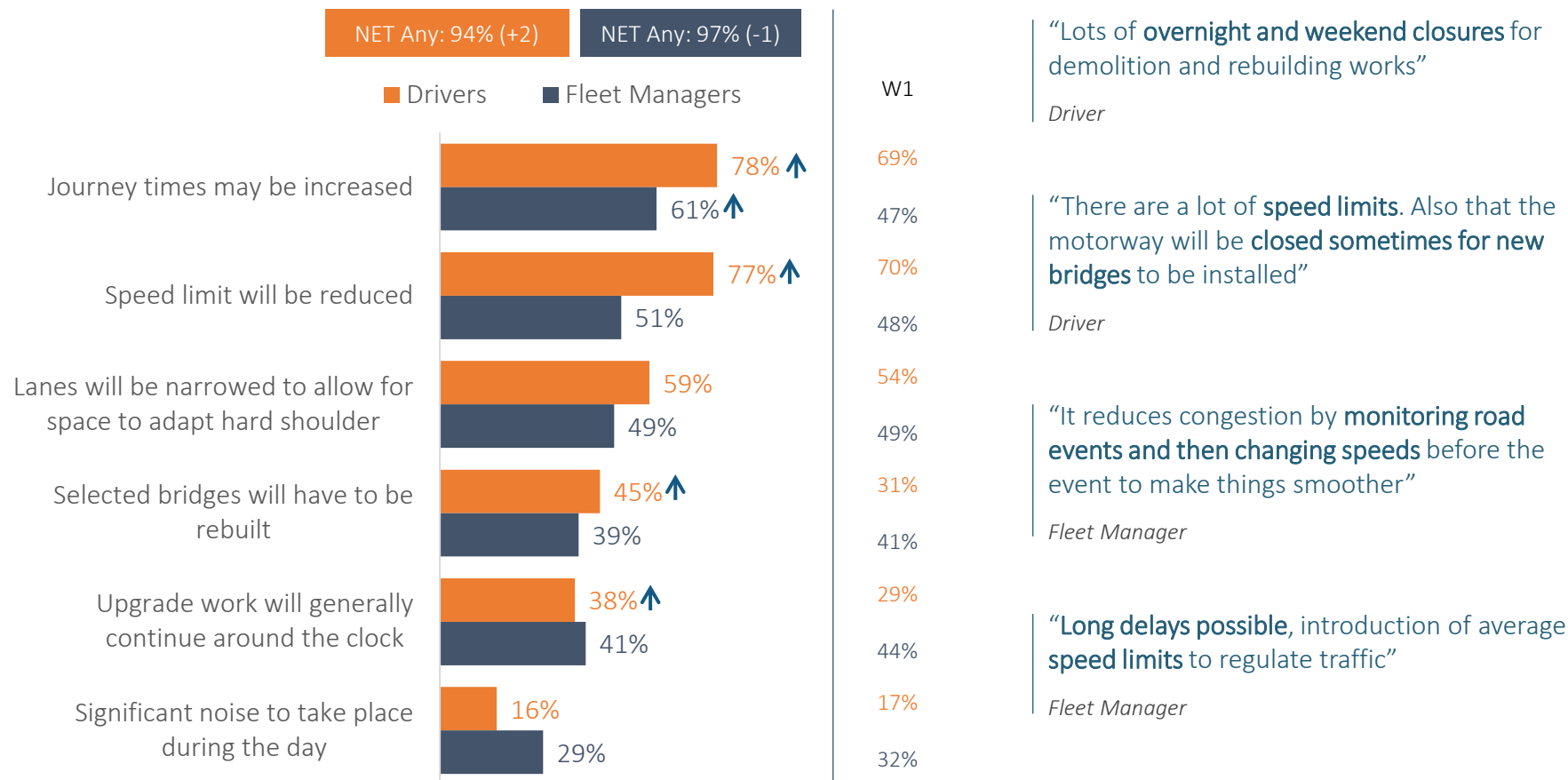


Understanding of implications of the works [prompted]

When prompted, drivers are generally knowledgeable of the impact of the works, particularly around the influence on their day-to-day journey times and speed limits. There is much less of a change this wave among fleet managers in general

Based on all road users aware of upgrade (Wave 2)

↕ Indicate significant difference to Wave 1 @ 95% confidence level

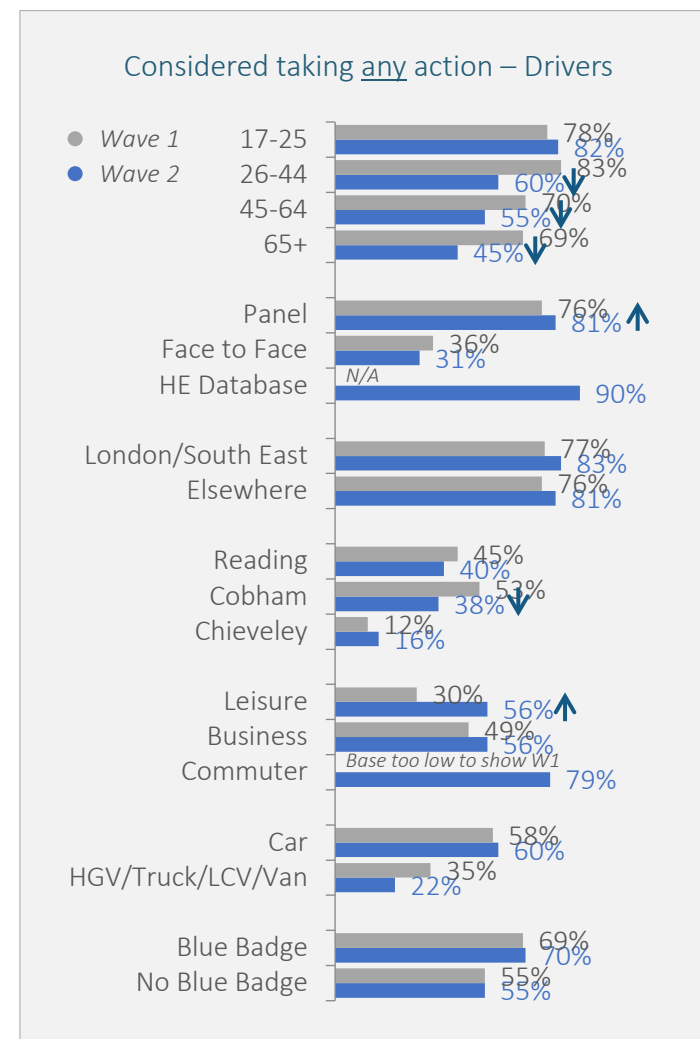
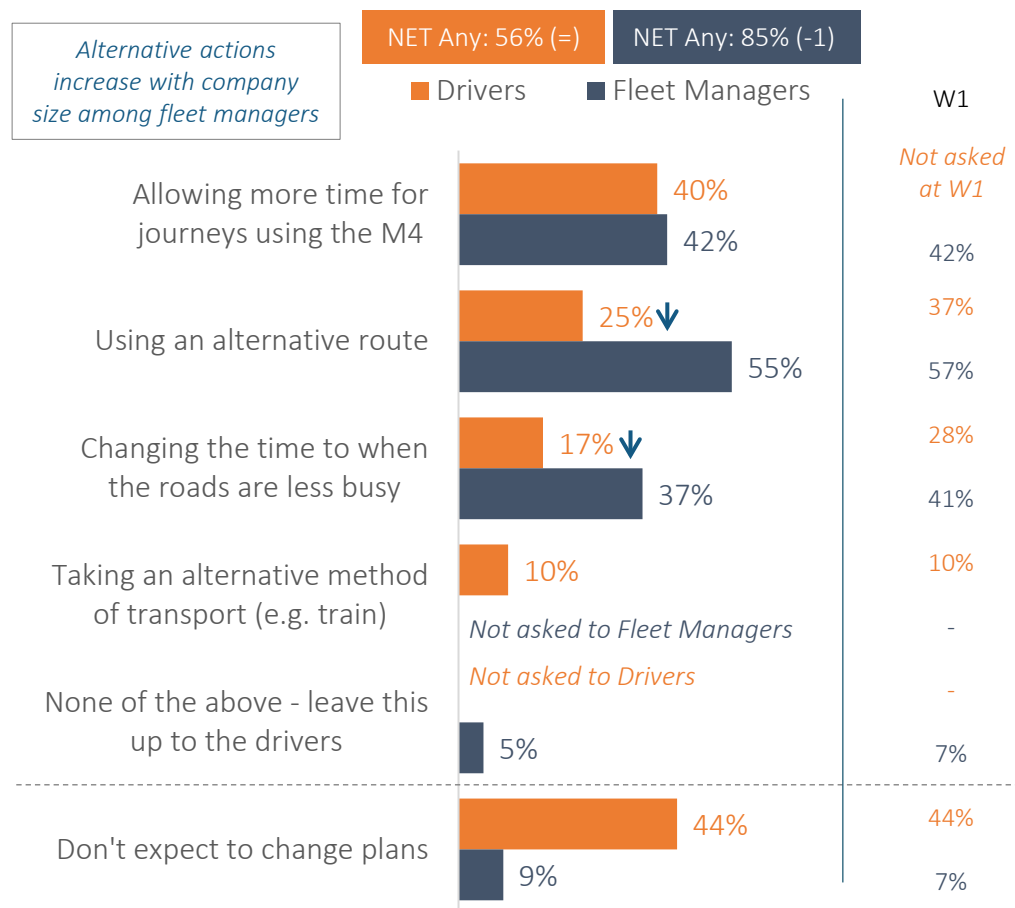


Alternative actions considered during roadworks

Fewer drivers have considered using an alternative route or changing their journey to quieter times this wave – generally people have accepted there will be disruption and put up with it, simply allowing more time for their journeys

Based on all road users (Wave 2)

↑↓ Indicate significant difference to Wave 1 @ 95% confidence level

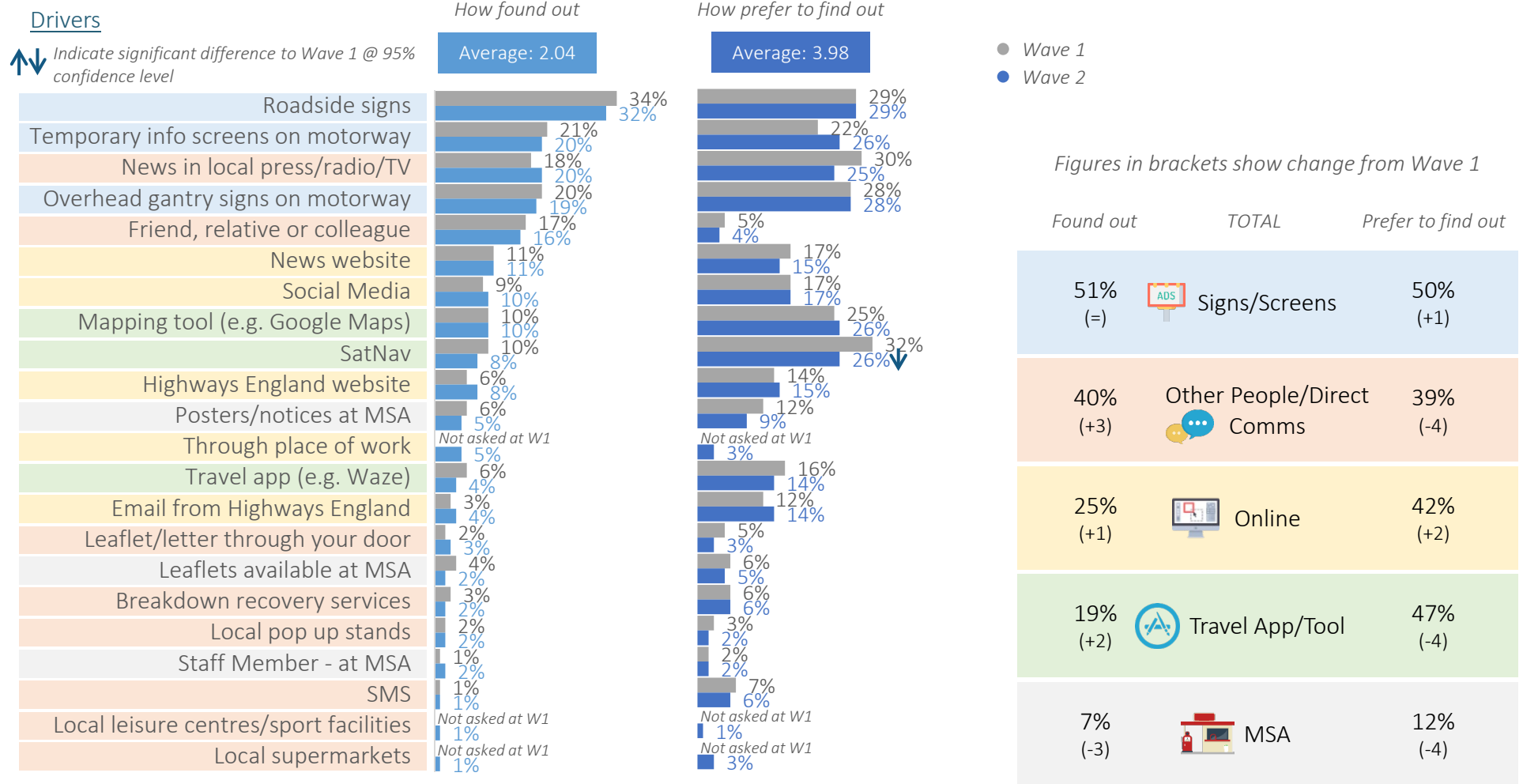


SECTION 4

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. Road users are still open to comms through SatNav or mapping tools which could be dialled up moving forwards



Please note, answers not comparable with fleet manager survey

Multi code question so answers do not sum to 100%

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

More fleet managers have found out about the upgrade through the Highways England website this wave, an increasingly popular channel. Local news outlets have fallen back, but remain a key desired channel

Fleet Managers (Wave 2)



Indicate significant difference to Wave 1 @ 95% confidence level

How found out

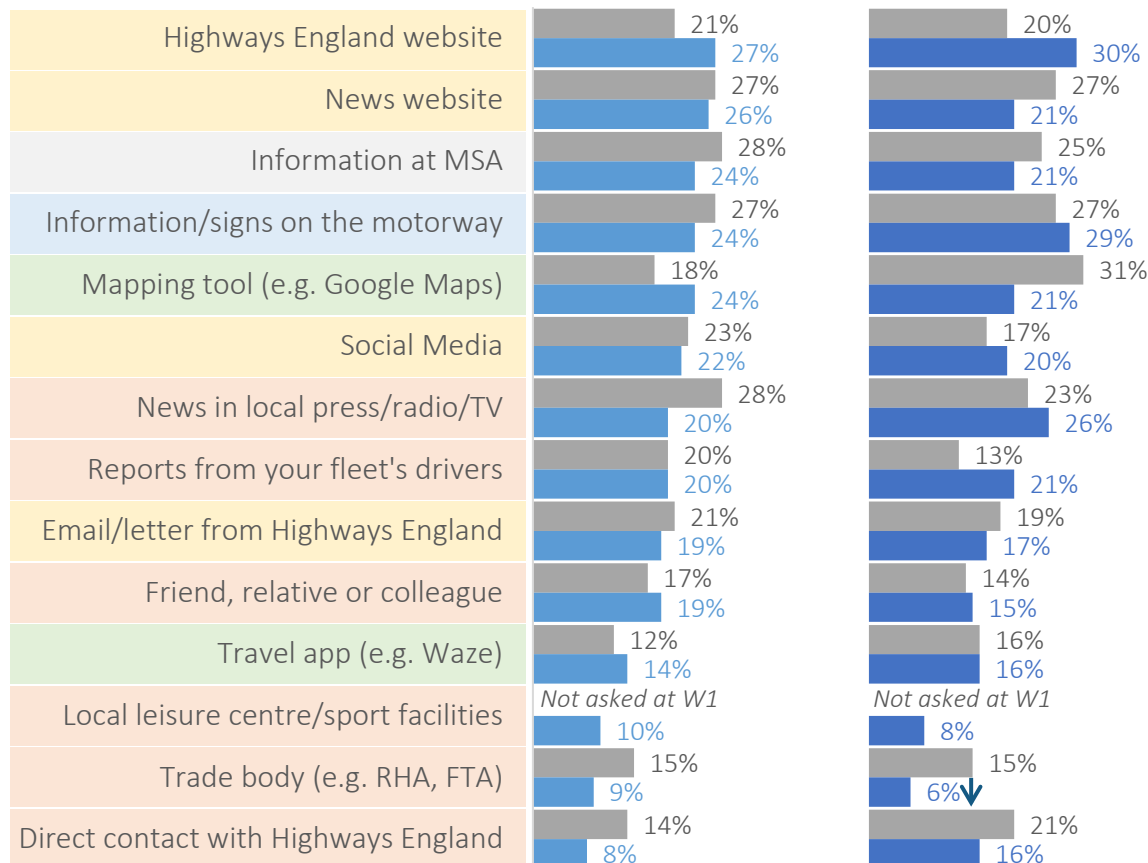
Average: 2.89

How prefer to find out

Average: 2.82

● Wave 1






● Wave 2



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

Figures in brackets show change from Wave 1

Found out TOTAL Prefer to find out

24% (-2)	 Signs/Screens	29% (+2)
56% (-8)	 Other people/direct comms	60% (+4)
59% (-5)	 Online	60% (+3)
32% (+4)	 Travel App/Tool	31% (-10)
24% (-4)	 MSA	21% (-4)

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

Multi code question so answers do not sum to 100%

Satisfaction with information

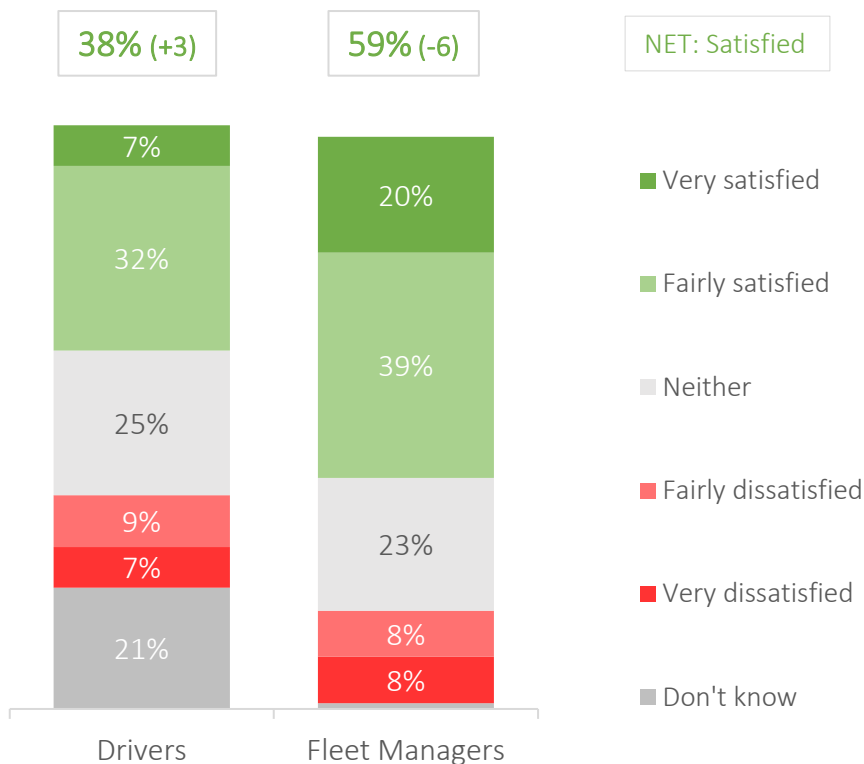
Younger drivers are most satisfied with the information available this wave, reflecting higher levels of awareness among this group. Satisfaction has also increased among those travelling for leisure purposes and those from further afield (e.g. outside London/South East)

Based on all road users (Wave 2)

↕ Indicate significant difference to Wave 1 @ 95% confidence level

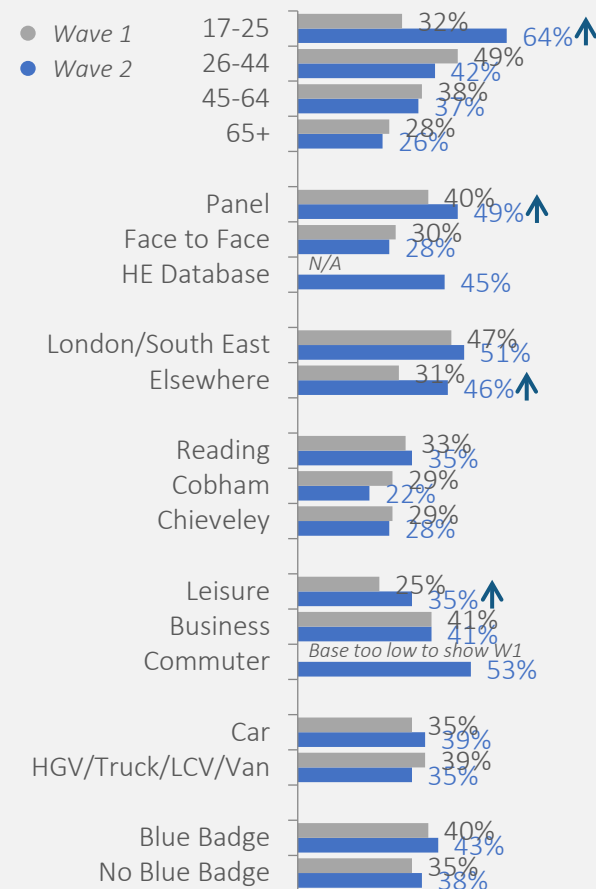


NET: Satisfied



Figures in brackets show change from Wave 1

Satisfaction with information – Drivers



Q21. Overall how satisfied or dissatisfied are you with the information currently being provided about the M4 Smart Motorway Upgrade? Base:

Wave 1/2, Drivers (803/1080) Fleet Managers (205/201) 17-25 (59/93) 26-44 (213/403) 45-64 (159/384) 65+ (78/200) Panel (509/680) Face to Face (294/335) HE Database (65) London/South East (304/393) Elsewhere (205/352) Reading (86/105) Cobham (103/109) Chieveley (105/121) Leisure (180/705) Business (73/168) Commuter (18/162) Car (716/973) HGV/Truck/LCV/Van (48/56) Blue Badge (86/116) No Blue Badge (710/950)

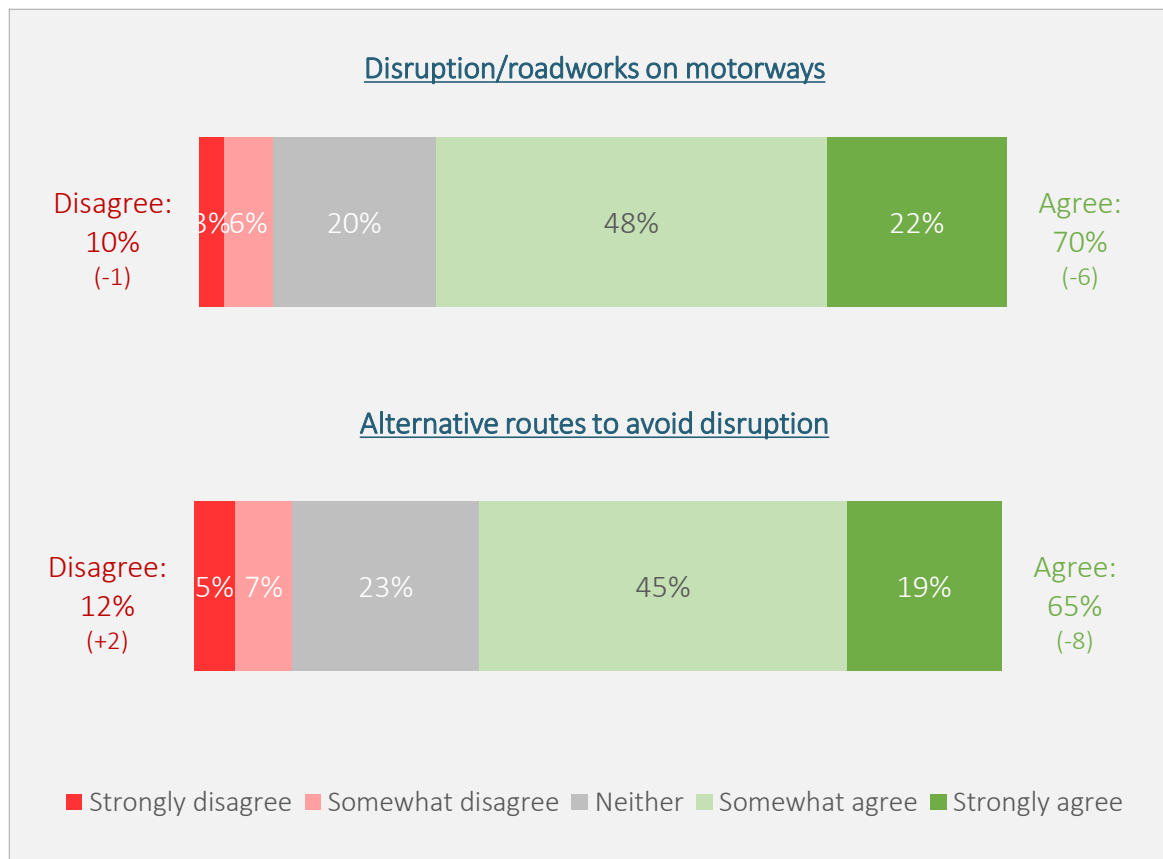
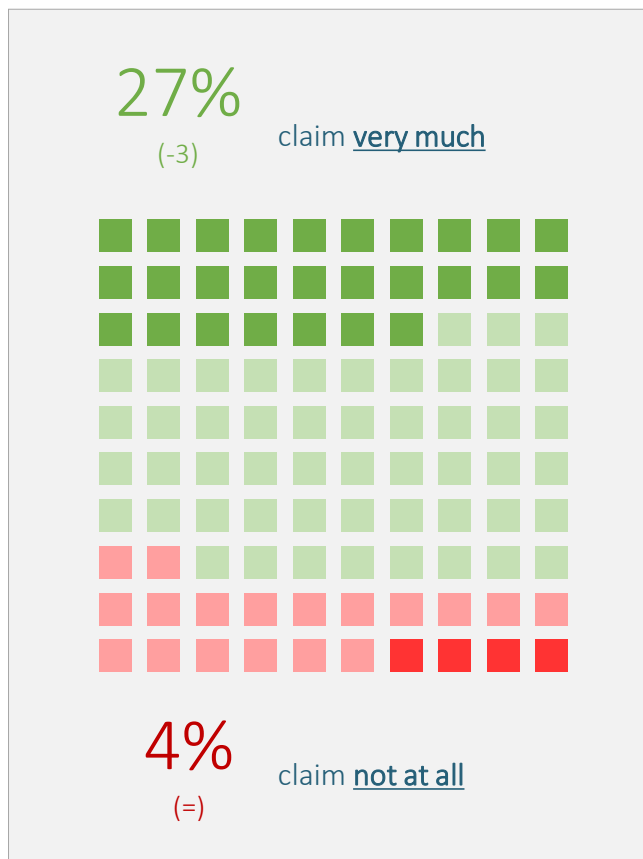
M4 currently meeting needs/satisfaction with information [Fleet Managers]

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

Generally fleet managers are a little less satisfied with the information on the M4 upgrade and motorways in general this wave

Do junctions 3-12 meet company's needs

Currently getting information needed for...



Figures in brackets show change from Wave 1

No significant differences to Wave 1 @ 95% confidence level

SECTION 6

Perceived benefits and overall level of support

Benefits of the upgrade

Understanding of the benefits of the upgrade has weakened this wave, with significantly more drivers and fleet managers claiming they will not experience any benefit

Based on all road users (Wave 2)

This supports findings from the qualitative phase that users are now more looking to be reassured over concerns they have and to receive justification of the risks of a Smart Motorway

↑↓ Indicate significant difference to Wave 1 @ 95% confidence level

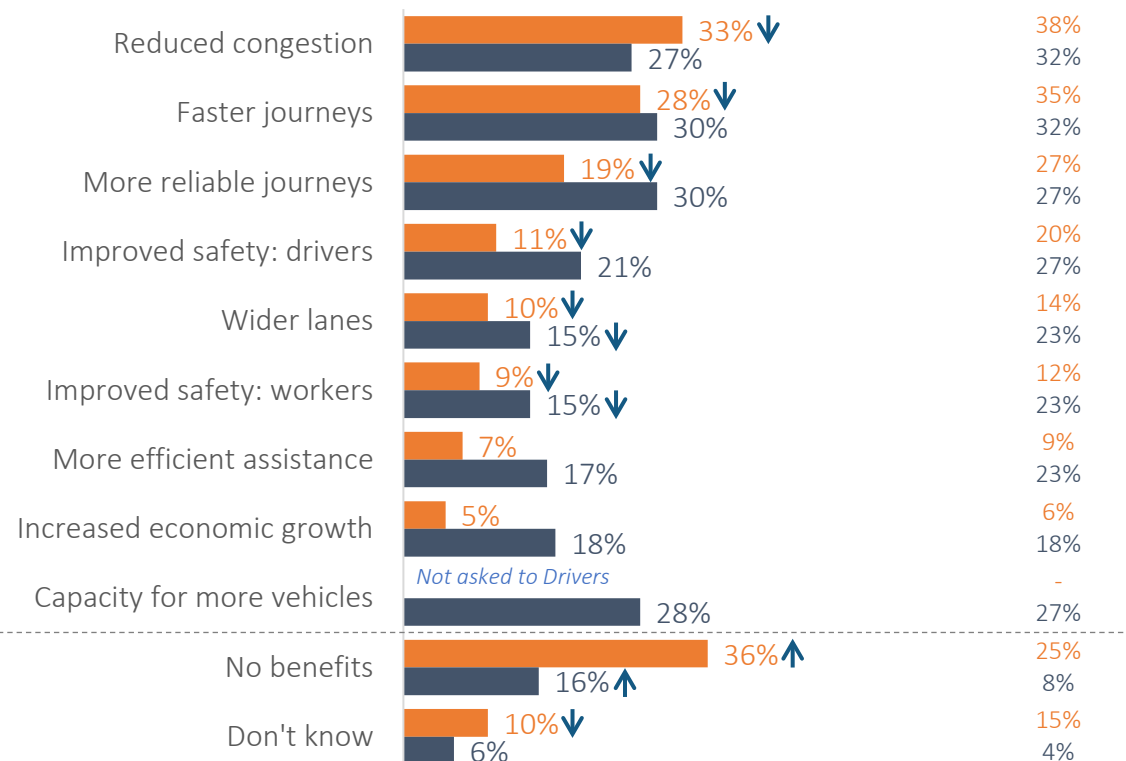
NET Any: 55% (-5)

NET Any: 78% (-10)

Drivers

Fleet Managers

W1



“Not sure that smart highways give that much benefit to be honest, I am particularly worried about there being no hard shoulder available if you have an emergency”

Driver

“At the times I commute along the M4 between J12 & J3 (6am & 2pm), I do not believe I will benefit from the upgrades and yet I have to suffer 3.5 years of disruption”

Driver

“Quicker and more reliable journeys”

Fleet Manager

“Smart motorways are much safer and allow continued traffic flow at a slower speed”

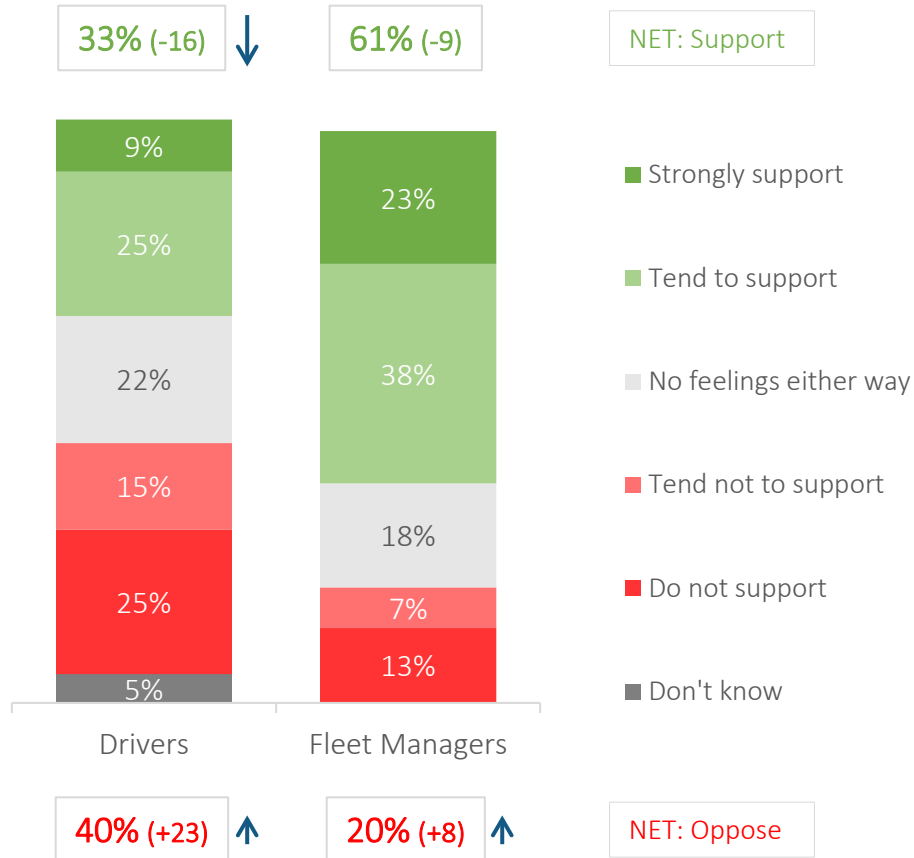
Fleet Manager

Support for the M4 Smart Motorway upgrade

Support of the M4 Smart Motorway Upgrade has fallen significantly among drivers, with opposition growing wave on wave

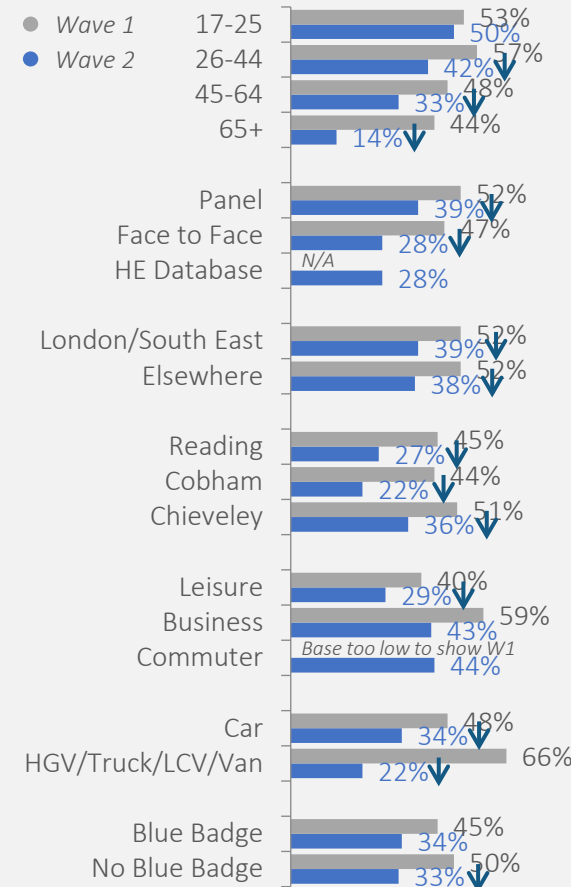
Based on all road users (Wave 2)

↑↓ Indicate significant difference to Wave 1 @ 95% confidence level



Figures in brackets show change from Wave 1

Support for upgrade – Drivers



Those most likely to oppose are older drivers, Face to Face responses and those travelling in HGVs

Opposition is stronger among HGV drivers than Fleet Managers, suggesting those experiencing the disruption more often are less satisfied with the situation

Why support the upgrade [Drivers]

33% support the works

Many drivers perceive the short term pain essential for the long term gain, and that the upgrade will benefit all users. Some also mention the environmental impacts this scheme will have

Short term pain for long term gain

"If all goes well, at the end of it, it should improve the quality of the road and safety of the bridges etc. It will however disrupt the journeys of people for a while causing lots of traffic"

"Because even though the works are quite disruptive, it will mean that journeys will flow better and with less hold ups. It's a very important motorway off the M25 to the west"

"I feel like although it may be frustrating to have delays at the moment, in the long run it will be worth it for the benefits it provides"

"It needs to be a pain in the short term for longer gain"

Upgrade helps everybody

"Increasing the capacity and reliability of this stretch of road will be of benefit to the individual and to businesses, and should help reduce emissions arising from hold ups and slow moving traffic"

"It will help everyone once finished to have a more reliable journey. Yes, it will cause disruption currently but once finished it will be much better"

"It's the most congested motorway in England, being a major route to London. I have friends in that area that say it is a nightmare getting to and from work, so this will hopefully help everybody to make their lives easier"

Environmental improvements

"Will cut down the traffic delays and provide for a smoother flow on the congested motorway, a move which is long overdue. It will also improve the quality of life for me as the noise reduction to adjacent/neighbouring properties is a great benefit"

"This will benefit all travellers, will increase safety on the roads and also environmentally there will be less strain"

"Although it is a bit of a pain at the moment, I do not have anything against efforts to ease congestion or increase road safety. Or to help the environment, which I understand smart motorways will do"

Why oppose the upgrade [Drivers]

40% oppose the works

Opposition is focussed on the dangers of losing the hard shoulder and concerns over the emergency refuge areas. Some also think the upgrade is not worth the investment, and should be spent in other areas, suggesting many are blind to the benefits because of perceived safety concerns

Danger of losing hard shoulder

"Already seeing what the smart motorways have done to M3 and M25 with so many more accidents as no hard shoulder to possibly be able to pull over to in an emergency, instead you have to sit in a live lane and hope no one hits you"

"Removing the hard shoulder is extremely dangerous given the speed at which traffic travels on a motorway. There have been deaths already and there will be more. The signage has been utterly confusing and you cannot get out of the car for fear of being hit by a passing car"

"When there is an accident there will be a four lane gridlock and it will take the emergency services longer to attend the site"

Concerns about refuge areas

"You cannot choose where your car will break down and if there is no refuge area right next to the car, you and other cars are in danger. Many electric cars cannot be pushed or towed if they break down and could therefore create a major danger if they are blocking a lane"

"Because they do not allow safe places for people who have broken down, you cannot pull over into the hard shoulder. More people drive in a dangerous manner these days"

"Think they are very dangerous if you break down. Although they do tend to, in my experience, help traffic move better, the refuge areas are too far apart making it a nightmare for anyone who happens to break down"

Opposition to smart investment

"I wholeheartedly believe the UK's Government should be investing in better public transport AND Park & Ride schemes (outside of the M25) to reduce road congestion and the associated pollution, not Smart Motorways"

"Due to a lack of investment in road management and road maintenance, the UK Government is trying to paper over the cracks of the inadequate infrastructure by creating these dangerous motorways"

"Media reports that near miss incidents are hugely more frequent on motorways without a hard shoulder. Investment in trains would be more beneficial than more car users or road fixes"

Why support the upgrade [Fleet Managers]

61% support the works

Fleet managers generally see any action as an essential improvement to the road network, and agree that initiatives focussing on easing congestion are a good thing

General improvement

“Any improvements to the motorway is a good thing, whether that’s better movement, better flow of traffic, less time wasted or better economic benefits for everyone”

“Anything that is being tried to make our business more efficient is a good thing”

“If it makes things easier and faster then it should go ahead”

“Smart Motorways are very innovative in the way that they reduce vehicle speed to flow more evenly in congestion, also enabling the hard shoulder to be opened as an additional lane, Smart Motorways are much safer and allow continued traffic flow at a slower speed”

Eases congestion

“It should reduce congestion in the long run”

“It eases congestion so is worth it in the long term”

“Improvements to journey times with less congestion and making the roads safer”

“There is no excuse for continuous standstill traffic”

Essential for the future

“It is essential we have an up to date road network”

“The UK road system in general has become run down over the past 30 years, and we are in a far lower standard of roads now. We have gone from first place to not even in the top 20 in Europe. Road maintenance is embarrassing, forever patching poor road surfaces rather than putting in a long term total resurfacing fix”

Why oppose the upgrade [Fleet Managers]

20% oppose the works*

Hauliers that oppose the upgrade do so mostly out of safety concerns, given the removal of the hard shoulder and perceived underperformance of the refuge bays

Danger of losing hard shoulder/upgrading to Smart Motorway

Opposition to smart investment

"Why can they not add lanes instead of losing the vital hard shoulder, it is a dangerous corner cut"

"Smart Motorways have been proven to be unsafe, so it is not worth the money and effort"

"We don't need more room for cars, we need better mass public transport"

"It is not safe to get rid of the hard shoulder, it will cause accidents and people will die"

"Smart Motorways are dangerous. How many more deaths do we need to have before the politicians get it?"

"Waste of time, money should be spent on public transport or more importantly cycling infrastructure"

"The hard shoulder is for break downs. The refuges will be too far apart and there is no guarantee that if you break down you will be able to get to a refuge. There will be more deaths because of this idea and there will be many more hold-ups. The overall journey time will, on average, take longer because of fatal accidents because of breakdowns in the "slow" lane"

"Smart Motorways are far more dangerous than normal roads"

"We need fewer cars on the roads and smart motorways aren't safe if you break down"

"Smart Motorways are a disaster that kill people. They do nothing to speed up traffic and they are already acknowledged as a huge mistake"

SECTION 7

Summary of Findings

Summary of findings

- Communications regarding the upgrade have been successful – awareness is significantly higher across nearly all road users, and levels of knowledge remain strong
- There is still relatively low engagement with the works, and spontaneously most simply recall that the upgrade is happening
- More users are aware of the hard shoulder conversion/removal this wave, though some still believe the hard shoulder will only be used in busy traffic
- A higher proportion of users expect extended journey times and speed limits now. More drivers reference ‘behind the scenes’ impacts (bridge demolition, round-the-clock work), suggesting specific comms are cutting through better
- Most have not considered changing their behaviour and are simply grinning and bearing the pain of disruption by allowing more time for their journeys
- A minority of drivers have taken a diverted route to avoid the roadworks – most are reasonably happy with signposting on diverted routes, though some are dissatisfied with this service
- Drivers are generally finding out in the ways they want (signs/screens, other people) but could benefit from mapping tool alerts for direct notifications. More fleet managers are finding out through HE’s website, which has become a much more important channel for them
- Support for the works has fallen this wave, with opposition rising. Opposition focusses on concerns about the hard shoulder and where to go if one breaks down, reflecting the wider public debate on Smart Motorway safety present at the time of fieldwork. Users are now transitioning into a ‘justify and reassure’ mindset