



Logistics and Coach Survey: Strategic Roads

2020-21

Foreword

The freight and coach sectors need England's network of strategic roads – that is, motorways and major 'A' roads – in order to operate successfully.

As the road user watchdog, Transport Focus surveys logistics and coach businesses to make sure that motorways and 'A' roads are delivering for them. The Department for Transport has specified that this survey is one of the measures used to assess how Highways England – which manages these roads on behalf of the Government – is doing.

The results for 2020-21 show that around

half of lorry and coach managers are satisfied, with around one in five dissatisfied. Also, that the freight and coach sectors feel that they don't matter much in Highways England's medium to long-term plans for these roads. Notably, satisfaction with rest stops and response to accidents are the lowest rated areas.

We will continue to encourage Highways England to engage further with these sectors as the country rebuilds after Covid-19.

Anthony Smith

Chief executive, Transport Focus



Results

Overall satisfaction

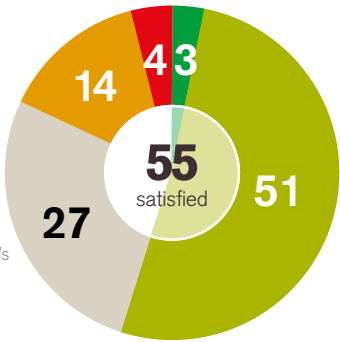
We asked ‘Overall, how satisfied or dissatisfied are you with England’s motorways and major ‘A’ roads when it comes to meeting your business needs?’. Just over half (55 per cent) were satisfied overall, while around one in five were dissatisfied (18 per cent).

Overall satisfaction for the freight sector was 55 per cent. Within freight, among those using articulated lorries (made up of two separate sections – a driving cab and a trailer) satisfaction was 52 per cent. Among those using rigid lorries (those without a separate driving cab) satisfaction was 59 per cent.

The satisfaction figure for the coach sector was 52 per cent.

1 Overall satisfaction (%)

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



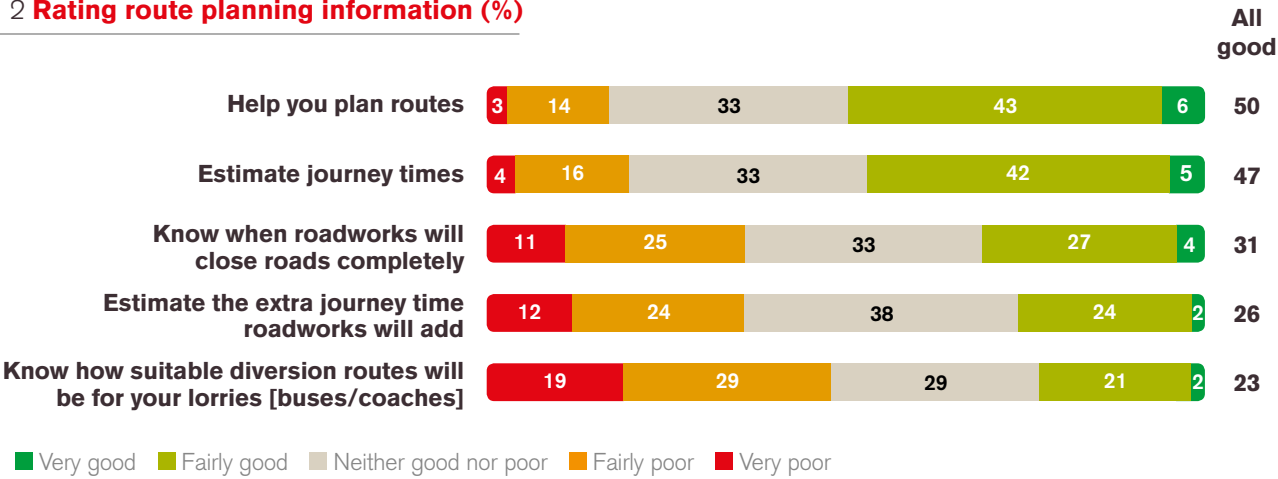
Q) Overall, how satisfied or dissatisfied are you with England’s motorways and major ‘A’ roads when it comes to meeting your business needs (n = 975)

Planning routes

Around four fifths of vehicle managers are involved in route planning. Their satisfaction ratings were no more than 50 per cent on any aspect of information available. Rated notably lower was information to estimate extra journey time due to roadworks (26 per cent) and information about how suitable diversion routes are for vehicles (23 per cent).

"One central (live map) showing roadwork road closures. Drivers can access on the day order to plan."

2 Rating route planning information (%)



Q) When organising these routes/schedules, how do you rate the availability of information about these roads to: (n = 785, 773, 789, 782 and 783 respectively)

"We need to be consulted - notification of works is not a consultation. Most routes carry significant numbers of schoolchildren who are time critical. We also have a statutory responsibility to run buses punctually. Stop the blame game with county council highways teams."

Of the vehicle managers involved in route planning, four in five do so on the day or within a few days of journeys. Half say their lorries are on the strategic road network for more than five hours on an average journey. Half say the window of arrival time is 30 minutes or less. Around two thirds use internal planning systems as part of their methods to plan their routes.

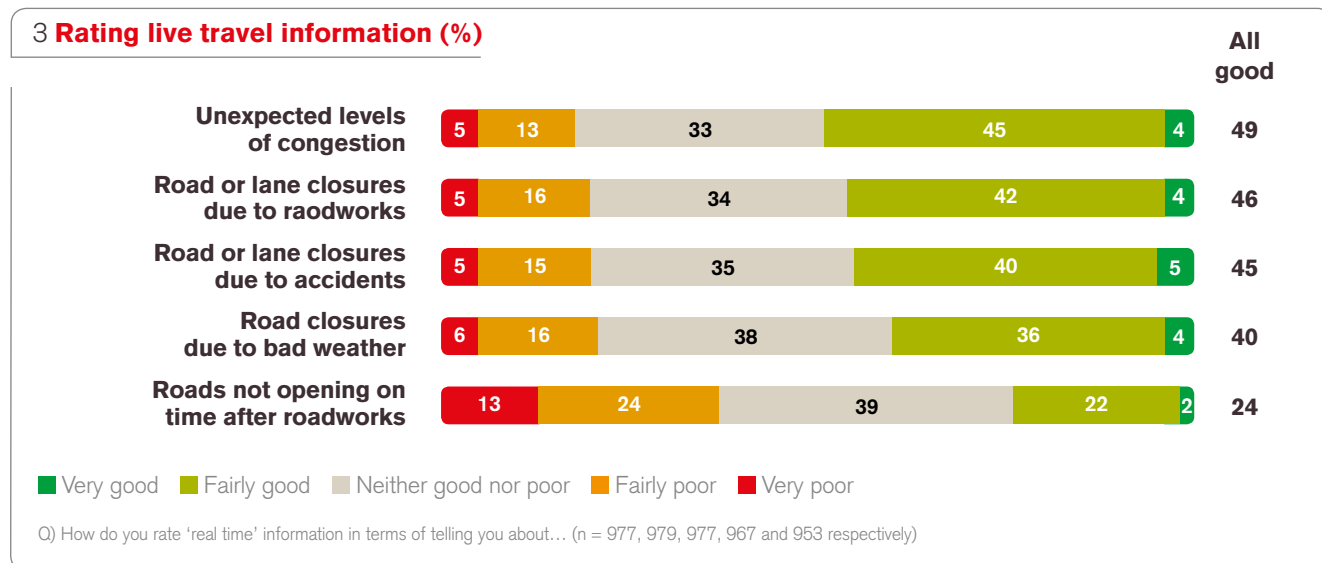
On the day information

Most measures on availability of live travel information were rated better than advance planning (but still below 50 per cent). However, the rating for information about overrunning roadworks is particularly low, with 24 per cent rating it good.

"More advance information on serious delays and better information on length of delays - particularly at point of entry to road section."

"Implement a warning / information service for businesses. Immediate and up to date incident alerts both minor and major. Vehicles can find out too late that they are heading for an incident and consequently getting stuck."

3 Rating live travel information (%)



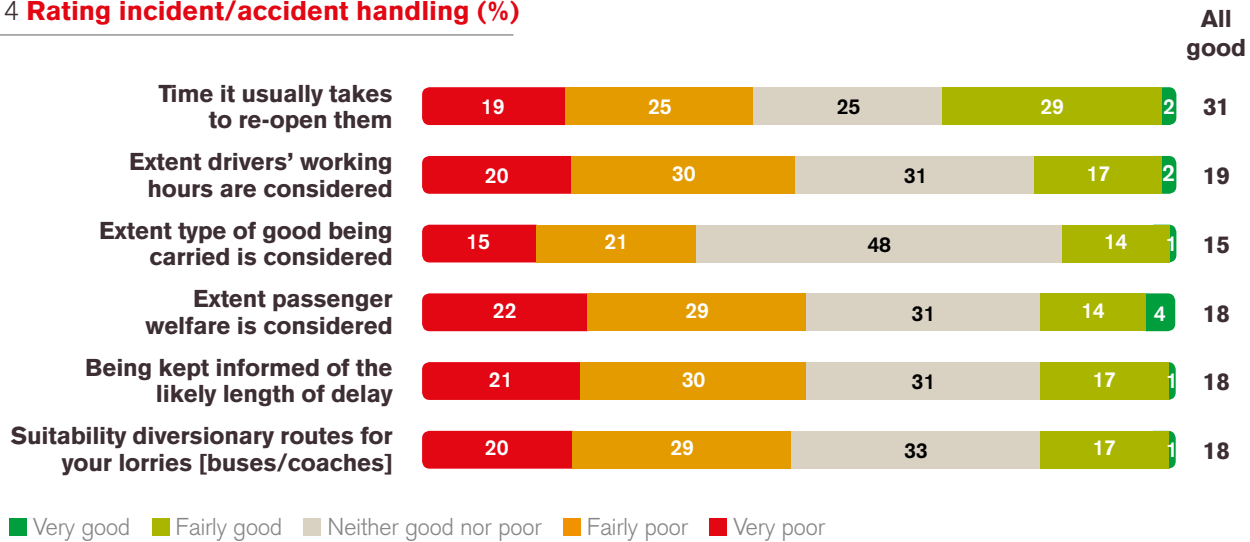
Responding to incidents and accidents

On responding to incidents and accidents, three in 10 rated the time to re-open roads as good. Most of the aspects in this group were rated as poor by around half of vehicle managers. Comments from vehicle managers express frustration that 'small' incidents seem to take a long time to clear. It is felt there is little consideration for drivers' working hours in these circumstances, or on the impact for coach passengers.

"In the event of an accident I would like to see roads re-opened faster. Only closed when absolutely necessary. One or more lanes should be kept open where possible instead of being over cautious and closing the road."

"Look at your website and how non-user friendly it is. We want real time information quickly for incidents and closures."

4 Rating incident/accident handling (%)



Q) How do you rate 'real time' information in terms of telling you about... (n = 976, 956, 775, 127, 973 and 965 respectively)

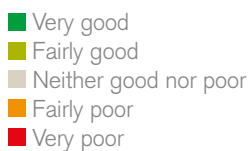
Road surface

A common complaint is the impact that road surfaces have on vehicles. This is evident in the results. Just over a quarter of respondents rated road surfaces as good and two fifths rated them poor. Almost a quarter of freight managers were concerned that surfaces are damaging goods, and just over a third of coach managers felt surface quality impacted passenger comfort.

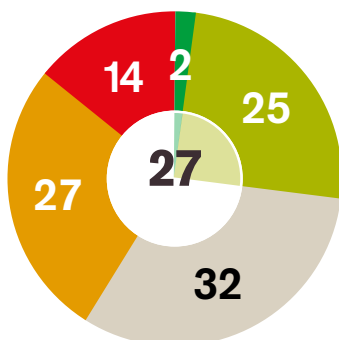
"Surface replaced more often, repair quality often poor."

"Better road repairs instead of just filling in with tarmac which comes straight out next time it rains."

5a Road surface - wear and tear (%)



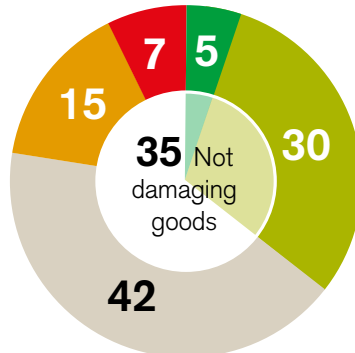
Q) How do you rate the surfaces of these roads in terms of: minimising wear and tear to your lorries [buses/coaches] or their tyres? (n = 983)



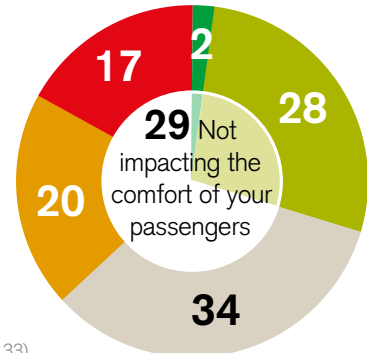
5b Road surface – impact on goods/passengers (%)

Very good
 Fairly good
 Neither good nor poor
 Fairly poor
 Very poor

Q) How do you rate the surfaces of these roads in terms of: not damaging goods? (n = 840)



Q) How do you rate the surfaces of these roads in terms of: not making passengers uncomfortable? (n = 133)



Rest stops

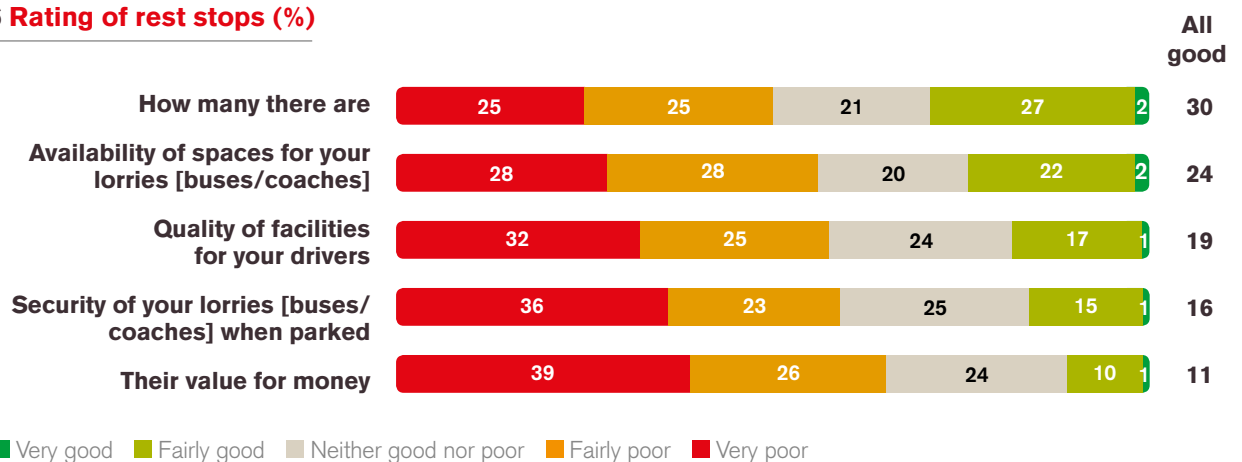
There were a considerable number of comments around the facilities for drivers to properly rest, especially as they have regulated driving hours. Vehicle security while parked up and the value for money of rest places were rated as poor by over half of all vehicle managers.

"Driver facilities are terrible. Showers and food availability is awful."

"The facilities for off road parking for HGVs are terrible. They are overpriced and not secure, of all the damage/theft we have to deal with most are in motorways services."



6 Rating of rest stops (%)



Q) Thinking about stopping places for your lorries [buses/coaches] and drivers on these roads, from a business perspective, how do you rate the following: (n = 964, 962, 954, 945 and 928 respectively)

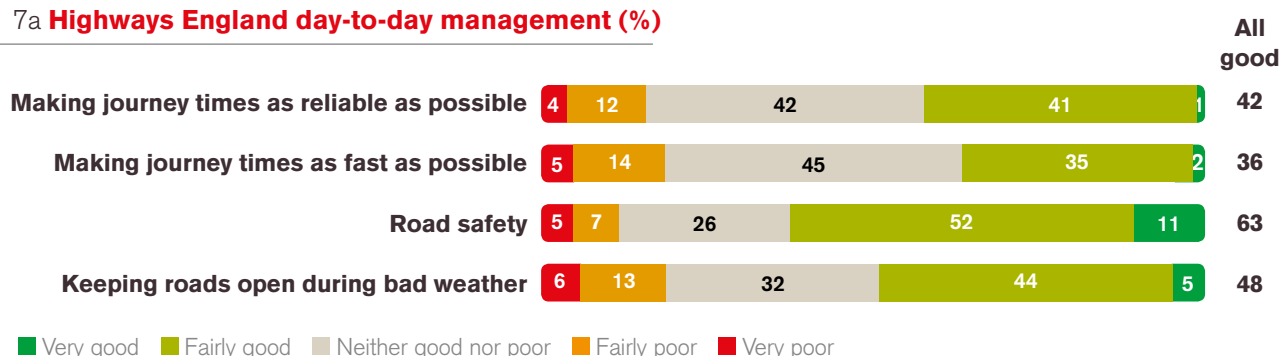
View of how Highways England manages these roads

On day-to-day management of Highways England's roads, safety scored highest, with 63 per cent rating it good. On keeping roads open in bad weather, almost half rated it good. Around two in five vehicle managers rated the efforts being made to make journey time as reliable and fast as possible as good.

"Management is the real problem. All these roads are full of potholes doing lots of damage to our vehicles and tyres. Road works go on for years, no one on site, it's just a joke, gets worse every year."

"Proper policing of the roads, watching traffic and doing something pro-active in regards to the appalling standards of driving shown on the roads."

7a Highways England day-to-day management (%)



Q) From a business standpoint, how do you rate Highways England's management of these roads in terms of: (n = 962, 962, 965 and 969)

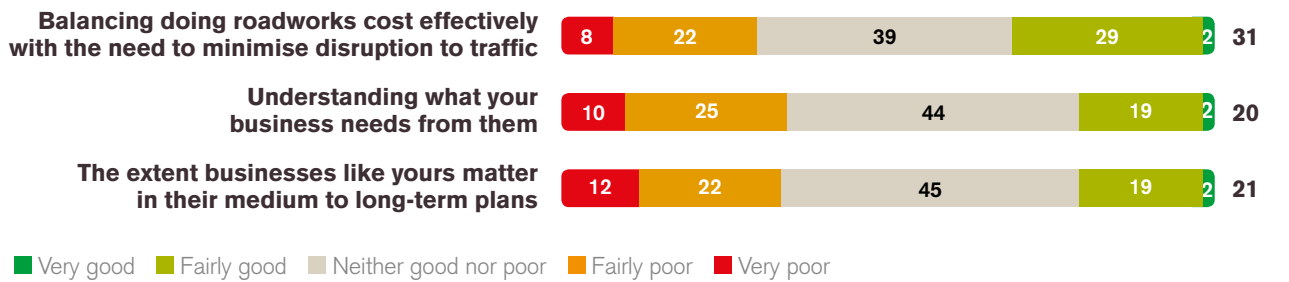
However, when looking at the more 'strategic' aspects of management, ratings of 'good' reduce and 'poor' increase. One in five freight and coach managers do not feel their needs are understood, nor that they matter much in the medium to long-term planning for these roads.

We also asked about freight and coach vehicle managers' awareness of Highways England's role. Half said they had a fair understanding or better (51 per cent) and around two fifths (43 per cent) said a basic understanding. Very few (seven per cent) said they knew little or nothing about Highways England's role.

"Once roadworks are started they should be worked on 24/7 until they are completed. Nothing worse than seeing large roadworks with little or no activity taking long sections out of service may be most cost effective for the civil engineers but causes much greater costs for the users."

"Greater appreciation, recognition and understanding of the needs of HGV operators and drivers."

7b Highways England strategic management (%)

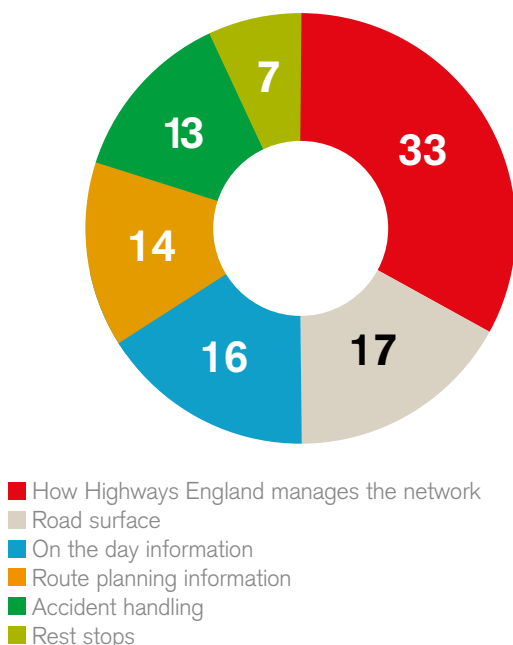


Q) How do you rate Highways England in respect of: (n = 942, 938, and 923 respectively)

What drives overall satisfaction

The extent to which each of these areas influences overall satisfaction is shown in the chart below. How Highways England manages the network has the largest influence, followed by road surfaces, and then on the day information. Within Highways England's management of the network, the top four measures impacting satisfaction are journey time reliability, journey speeds, balancing roadworks with keeping traffic moving, and understanding business needs.

8 What drives overall satisfaction (%)



Results are from a regression model assessing association between overall satisfaction and ratings for all attributes measured on a very good to very poor scale. A Shapley approach was chosen to best accommodate any collinearity between attributes. Model $R^2 = 0.38$.

What needs to improve

We asked vehicle managers what they would like to see improved. Many of their replies reflect the areas they rated poorly. The following points were mentioned most frequently by vehicle managers:

- They want roadworks to be split into consecutive, shorter stretches, worked on more intensively – avoiding long stretches coned off with seemingly limited activity. They want to know that the cost to business of extended journey times is considered when deciding how to do roadworks. They feel that roadworks are organised based on contractor convenience or lowest cost.
- They want minor incidents/accidents to be cleared up more quickly; they feel an over meticulous culture leads to roads/lanes being closed for longer than they believe is necessary.
- They want to be sure it isn't 'penny wise, pound foolish' when it comes to the standard of materials used for repairs; a number felt the same stretch of road needed to be re-done too soon after the first occasion.

"Why is the A3 'Hindhead Tunnel' closed so often for a road opened only 10 years ago?"

"Work to be completed in manageable phases, rather than digging up as much as possible to cause maximum disruption and traffic chaos initially and then only working on small sections at once without ever seeming to complete anything."

Messages to the Highways England chief executive

We asked respondents what one thing they would say to the Highways England chief executive if they were to meet. Many restated their 'what to improve' comments. Notably some other themes came through:

- road surfaces – with a 'fix potholes' message
- some acknowledged it is a tough job and thought on balance Highways England is doing well 'under the circumstances/financial constraints'
- many raised concerns about the safety of smart motorways, including lorry drivers encountering stopped vehicles before the red X has been turned on, the size of emergency refuge areas for their vehicles and the standard of other people's driving.

"When was the last time you spent a day in a truck on UK roads?" You can't appreciate what is needed if you haven't experienced it yourself."

"Smart motorways abolished! Drivers fear them and the possibility of stationary vehicles in them."

"That he has an impossible task and well done for what you do."

"Better road repairs instead of just filling in with tarmac which comes straight out next time it rains."

How we did it

Those responsible for operating vehicles over 3.5 tonnes ('vehicle managers') must be licensed by their Regional Traffic Commissioner, who makes a summary of this register publicly available. This is often referred to as the 'O' licence database. Transport Focus used this to select vehicle managers in proportion to the size of their fleet and invited them to complete a questionnaire.

During Road Period 2 (April 2020 to March 2025) we will carry out the survey three times each year, with fieldwork in May-June, October-November, and February-March. This first year of the survey is an exception, when it was carried out only in October-November 2020 and February-March 2021.

The results in this report are based on the October-November and February-March surveys which have overall response numbers of 1017. Of this, 878 responses are from freight and 179 are from coach vehicle managers. In each wave we write an initial invitation to complete the survey followed by two reminders. The questionnaire is provided in the first and final letters.

To take part in the survey, the majority of a vehicle manager's vehicles must use the strategic road network at least once a week. For the freight element of the survey, results are weighted to the goods laden mileage proportions

within the Department for Transport's Road Freight Survey (see table RFS0117 in that survey). In the overall results, freight constitutes 95 per cent of the total and coach five per cent – matching the estimated use of the strategic road network by these sectors.

Further details of the methodology are available from Transport Focus. References to coach operators includes bus operators where they run on England's strategic roads.



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Transport Focus is the operating
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