



# Road users' priorities for improvement

England's motorways and major 'A' roads

August 2021



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# Foreword



**U**nderstanding what transport users want improved is a key part of what Transport Focus does. In this report we set out road users' priorities for improvement when it comes to England's motorways and major 'A' roads. These roads make up the Strategic Road Network (SRN), managed by National Highways (the new name for Highways England) on behalf of the Government.

Our purpose in carrying out this research is to help the Government put road users' interests at the heart of its thinking as work starts to develop the third Road Investment Strategy (RIS). That strategy will set out what the Government requires National Highways to deliver between 2025 and 2030. This includes building new roads, maintaining the current ones and operating its network.

There are clear messages from road users. The majority want the focus to be on keeping National Highways' existing roads in good order before building new ones. Their top priority for improvement to the SRN is road surface quality, as we have found in previous research, followed by the safer design and upkeep of roads. They also want to see better management of roadworks, better management of unplanned delays such as accidents or breakdowns, and better information about unplanned disruptions.

I hope that this insight will be helpful to the Government, National Highways and the Office of Rail and Road as they each contribute to the development of the third RIS.

**Anthony Smith**

Chief Executive, Transport Focus

# Introduction

The core objective of this research was to understand the priorities for improvement to England's motorways and major 'A' roads, among those that use them. This is whether they are in a motor vehicle or otherwise. These roads make up the Strategic Road Network, managed by National Highways on behalf of the Government. As part of that work, we sought to establish the importance road users attach to maintaining the roads that currently exist compared to building new ones.

In addition, the research asked road users about:

- sustainability and electric vehicles
- road surface quality
- National Highways' current plans and targets
- ways to reduce journey times
- why driving on National Highways' roads can be stressful
- paying for the roads
- knowledge of National Highways.

We carried out the research in three stages:

- qualitative research among drivers and other road users
- qualitative interviews with experts from freight and coach operators and trade organisations
- quantitative research among drivers.

More detail about the methodology used can be found on page 26. This report takes its findings from all three stages. Fuller information is available in the three accompanying research agency reports, available on the Transport Focus website.



# Priorities for improvement to National Highways' roads – drivers and motorcyclists

Drivers' top priority for improvement to England's motorways and major 'A' roads in the 2025-30 Road Investment Strategy (RIS) is the quality of the road surfaces. This is the same as when we asked in 2015<sup>1</sup>.

Drivers were asked to select their priorities from a list of presented options and we also asked them to describe the desired improvements in their own words.

Safer design and upkeep of roads is the second highest priority for improvement among car and van drivers. Spontaneous comments made by drivers suggested that smart motorways played some role in this (it is worth noting that the subject had been discussed in the media immediately preceding the research, so it may have been more top of mind as a result).

The next most important priorities for improvement among car and van drivers are better management of roadworks, better management of unplanned delays and better information on unplanned delays.

There are only a couple of changes in the top five priorities for improvement compared to those from the 2015 survey. Having better behaved drivers has fallen from the third most important factor in 2015 to sixth in 2021. Better information on unplanned delays had been eighth in 2015 and is now fifth.

## Overall priorities for improvement to England's motorways and major 'A' roads – car/van drivers

|   | 2021 ranking | 2015 ranking |
|---|--------------|--------------|
| Improved quality of road surfaces                                     | 1            | 1            |
| Safer design and upkeep of roads                                      | 2            | 2            |
| Better management of roadworks  | 3            | 4            |
| Better management of unplanned delays such as accidents or breakdowns | 4            | 5            |
| Better information about unplanned disruptions (such as accidents)    | 5            | 8            |
| Better behaved drivers  | 6            | 3            |
| Better information about roadworks happening in future                | 7            | 10           |
| Better lighting on the network  | 8            | 9            |
| Reduced environmental impact of road travel                           | 9            | 12           |
| Better roadside facilities (service areas, laybys)                    | 10           | 15/16        |
| Increased reliability of journey times                                | 11           | 7            |
| Reduced journey times   | 12           | 6            |
| Better maintenance of signs   | 13           | 11           |
| Better maintained verges, including litter clearance                  | 14           | 13           |
| Ensuring journeys can be made in fully electric vehicles              | 15           | n/a          |
| Better data and phone connections                                     | n/a          | 14           |
| Better journey planning tools   | n/a          | 17           |

n/a = not asked in this survey

<sup>1</sup> Road users' priorities for improvement: car and van drivers and motorcyclists: <https://www.transportfocus.org.uk/publication/road-users-priorities-for-improvement-car-and-van-drivers-and-motorcyclists/>

While priorities for improvement among motorcyclists, HGV/LGV drivers, coach/bus drivers and drivers of electric cars/vans are all very similar to those for car and van drivers, they differ in the following key ways:

- Reflecting their own requirements and likely attitudes, drivers of plug-in electric cars/vans place greater importance than others on being able to make journeys by electric vehicle and on environmental issues.
- Motorcycle riders are more likely than others to prioritise having better behaved drivers.
- Commercial vehicle drivers place greater relative importance than others on better delay handling and more information on planned delays. This was emphasised in the expert interviews with freight and coach operators, for whom delays have financial implications. For them, advance notice of significant delays – across the entire network – is essential.

While the priorities for improvement among coach and freight operators were not dissimilar to road users as a

whole, they tend to think in terms of a longer timeframe and on a more strategic basis, considering the National Highways network as a whole. Few, if any, had urgent or short-term priorities. All the major areas for change were expected to take place over a longer period, but certainly during the period covered by RIS3.

The freight and coach operators we spoke to talked about the limitations of England's motorways and major 'A' roads. But they were aware that the current infrastructure presents a challenge and are, as a result, stoic about how much can be changed quickly.

*"Resurface roads to make it a pleasant journey rather than rattling through the uneven surfaces and pot holes."*

Car driver

### Overall priorities for improvement by different driver types – showing index scores

(100 = average level of priority for improvement)

|   | Car/<br>van | Electric<br>car/van* | Moped/<br>motorcycle | HGV/<br>LGV | Coach/<br>bus |
|---|-------------|----------------------|----------------------|-------------|---------------|
| Improved quality of road surfaces                                     | 191         | 128                  | 176                  | 165         | 150           |
| Safer design and upkeep of roads                                      | 167         | 117                  | 159                  | 145         | 138           |
| Better management of roadworks  | 146         | 111                  | 130                  | 138         | 123           |
| Better management of unplanned delays such as accidents or breakdowns | 127         | 114                  | 116                  | 126         | 127           |
| Better information about unplanned disruptions (such as accidents)    | 111         | 104                  | 103                  | 113         | 115           |
| Better behaved drivers  | 101         | 97                   | 113                  | 88          | 98            |
| Better information about roadworks happening in future                | 90          | 97                   | 92                   | 97          | 101           |
| Better lighting on the network  | 86          | 89                   | 89                   | 78          | 83            |
| Reduced environmental impact of road travel                           | 77          | 101                  | 85                   | 82          | 89            |
| Better roadside facilities (service areas, laybys)                    | 75          | 95                   | 83                   | 91          | 92            |
| Increased reliability of journey times                                | 74          | 88                   | 72                   | 83          | 80            |
| Reduced journey times   | 73          | 88                   | 70                   | 83          | 74            |
| Better maintenance of signs   | 65          | 78                   | 75                   | 73          | 72            |
| Better maintained verges, including litter clearance                  | 63          | 89                   | 74                   | 74          | 81            |
| Ensuring journeys can be made in fully electric vehicles              | 53          | 103                  | 63                   | 65          | 79            |
| <b>Base size</b>  | <b>4818</b> | <b>203</b>           | <b>407</b>           | <b>249</b>  | <b>134</b>    |

\*also included within overall car/van drivers.

The priorities for improvement among disabled car and van drivers are very similar to those of non-disabled car and van drivers (and therefore similar to those mentioned above for car and van drivers as a whole). However, disabled drivers place slightly less emphasis on the top five priorities and more on the following:

- better behaved drivers
- better roadside facilities
- ensuring more journeys can be made in fully electric vehicles (although this was still their lowest priority).

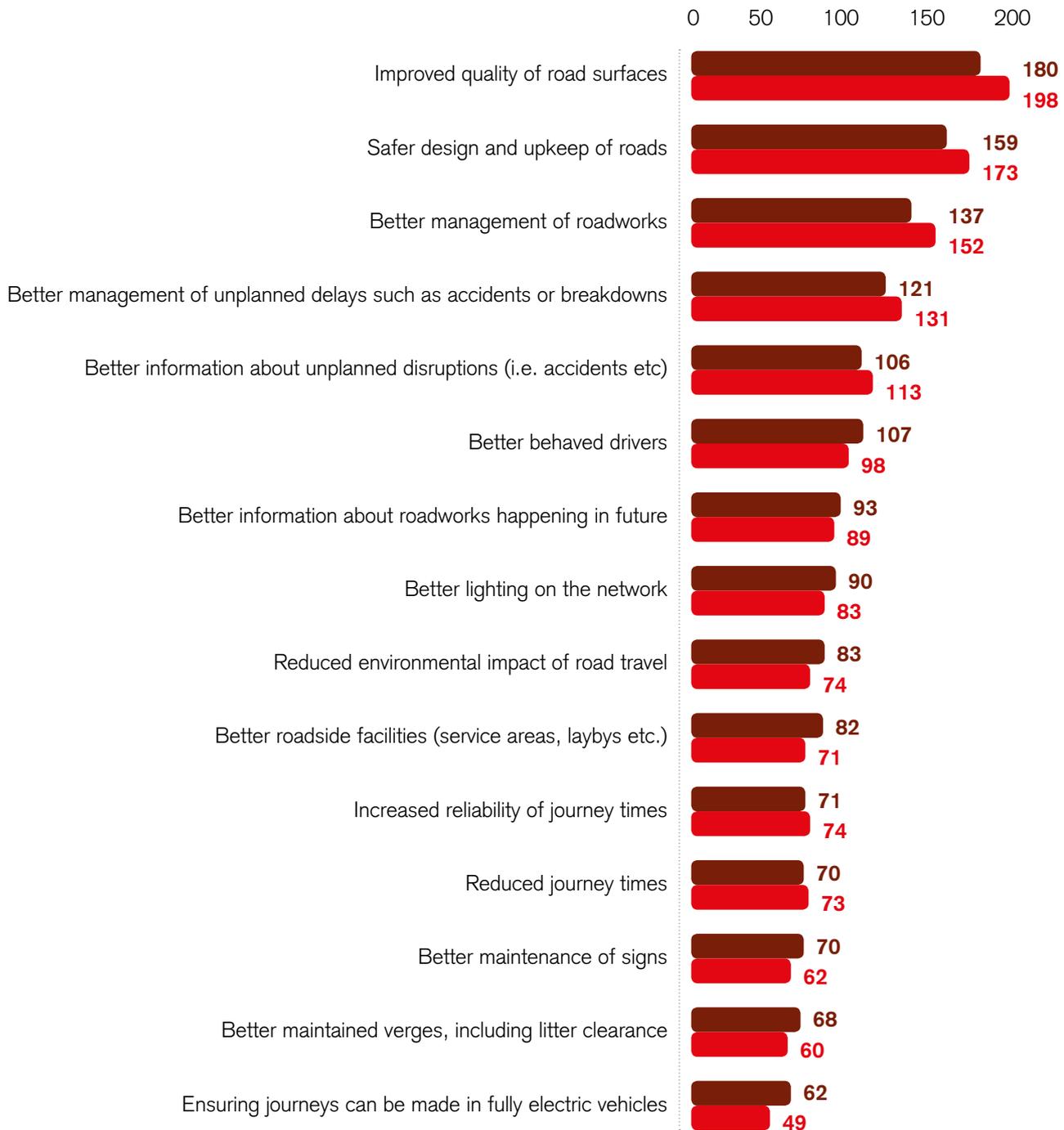


**Overall priorities for improvement for car and van drivers by National Highways regions travelled in or through on typical journey – showing index scores (100 = average level of priority for improvement)**

|   | North east & Yorkshire | North west  | Midlands    | East       | M25 only*  | South east  | South west |
|---|------------------------|-------------|-------------|------------|------------|-------------|------------|
| Improved quality of road surfaces                                     | 188                    | 189         | 191         | 198        | 167        | 195         | 199        |
| Safer design and upkeep of roads                                      | 163                    | 163         | 169         | 172        | 143        | 171         | 176        |
| Better management of roadworks  | 145                    | 147         | 147         | 151        | 130        | 154         | 150        |
| Better management of unplanned delays such as accidents or breakdowns | 126                    | 131         | 131         | 127        | 124        | 135         | 128        |
| Better information about unplanned disruptions (such as accidents)    | 113                    | 113         | 113         | 109        | 110        | 115         | 109        |
| Better behaved drivers  | 104                    | 103         | 105         | 100        | 97         | 94          | 105        |
| Better information about roadworks happening in future                | 94                     | 91          | 89          | 88         | 94         | 88          | 86         |
| Better lighting on the network  | 87                     | 87          | 82          | 79         | 93         | 84          | 77         |
| Reduced environmental impact of road travel                           | 72                     | 74          | 76          | 76         | 87         | 76          | 81         |
| Better roadside facilities (service areas, laybys)                    | 77                     | 74          | 71          | 77         | 87         | 71          | 72         |
| Increased reliability of journey times                                | 76                     | 77          | 75          | 72         | 77         | 75          | 71         |
| Reduced journey times   | 76                     | 75          | 75          | 73         | 79         | 73          | 70         |
| Better maintenance of signs   | 66                     | 63          | 63          | 65         | 71         | 61          | 61         |
| Better maintained verges, including litter clearance                  | 59                     | 60          | 61          | 62         | 70         | 58          | 61         |
| Ensuring journeys can be made in fully electric vehicles              | 52                     | 52          | 52          | 51         | 69         | 49          | 56         |
| <b>Base size</b>  | <b>789</b>             | <b>1040</b> | <b>1472</b> | <b>724</b> | <b>358</b> | <b>1191</b> | <b>854</b> |

\*travelling on the M25 (and on spur roads within it) only. Those who travelled in the east or south east and M25 were included in the east and south east results.

**Overall priorities for improvement - comparison between disabled and non-disabled car/van drivers  
– showing index scores (100 = average level of priority for improvement)**



■ Car/van driver with a disability  
■ Car/van driver without a disability

Q. Over the next few screens, you will be shown lists of possible improvements to England's motorways and major 'A' roads. We would like you to think about which elements you feel would be your highest priority to improve in the future.  
Base: Car/van drivers with a disability (1519) Car/van drivers without a disability (2996)

We asked car and van drivers to say, in their own words, how National Highways could improve their experience travelling its roads. Where possible, we have linked these themes with issues tested in the priorities exercise, with the number in brackets indicating ranking in the latter.

**Suggested improvements to National Highways' roads (spontaneous mentions) – car/van drivers**

|  |   |
|--|---|
| Less potholes/fill the potholes (including on a specified road)                      |  <b>15%</b> Road surface (1)                              |
| Repair/maintain the roads/better quality roads (unspec)                              |  <b>7%</b> Road surface (1)                               |
| Remove/reduce smart motorways (including perception of danger)                       |  <b>7%</b> Safer design of roads (2)                      |
| Improved road surfaces/quality of road surfaces (unspec)                             |  <b>6%</b> Road surface (1)                               |
| Less/fewer roadworks   |  <b>6%</b> Better management of roadworks (3)             |
| Better information/signs/signage/clearer (including specified type e.g. road/matrix) |  <b>5%</b> Better information on unplanned disruption (5) |
| Less traffic/reduce traffic  |  <b>4%</b>  |
| Better timing of roadworks/maintenance/disruption e.g. at night                      |  <b>4%</b> Better management of roadworks (3)           |
| All improvements to lane usage e.g. hard shoulder, bus lanes etc.                    |  <b>3%</b>  |
| More/better rest areas/laybys/services/recharging points etc.                        |  <b>3%</b>  |

Q. Overall, how do you think that Highways England could improve the experience of travelling on England's motorways and major 'A' roads for you?  
Base: Car/van (4818)



## Maintaining the existing versus adding new capacity

Drivers overwhelmingly agreed (91 per cent of car/van drivers) with the statement 'it is very important to properly maintain the existing motorways and major 'A' roads', including seven out of ten (69 per cent) who agreed strongly. On whether 'it is very important to build new motorways/'A' roads/add new lanes to existing roads' their agreement was lower (69 per cent) and far fewer agreed strongly (29 per cent). This difference was reflected when drivers were asked which of the two was more important. Almost two thirds (65 per cent) of car/van drivers placed more importance on the maintenance of existing roads than building new roads or adding lanes to existing ones.

Road users can feel exasperated by what feels like 'endless' building and rebuilding of major roads. A common refrain among drivers in the qualitative research was that those responsible for the road network should maintain what is already in place, rather than feeding the cycle of 'catching up with' increasing road demand. In the longer term they recognised the need for fewer vehicles on the

road particularly regarding the Government's environmental objectives. Many road users wanted to see improved execution of road maintenance and renewal - whether through more technologically-advanced materials or better planning. The hope is that newly-maintained or renewed roads should not need more roadworks for a long time.

There were a few differences for drivers of other vehicle types. Motorcyclists, commercial vehicle drivers and coach/bus drivers were all more likely than car and van drivers to agree that it is important to add new roads/new lanes (each around three-quarters agreeing). Indeed, commercial vehicle drivers and coach/bus drivers were almost equally likely to agree with both statements - maintaining existing roads and building new ones. However, when asked to choose between the two, drivers of all types of vehicle placed more importance on maintenance than building new roads/new lanes, although the extent of this was less for HGV/LGV drivers and those driving coaches and buses.

## Priorities for improvement to National Highways' roads – cyclists, pedestrians and equestrians

Two out of five drivers said that they crossed or used the National Highways network other than in a motor vehicle, with the main ways of doing so being to walk along/beside, cycle on/beside, or to cross it on foot.

Cyclists, pedestrians and equestrians are often drivers as well but there is little evidence that they have greater concern for pedestrians and cyclists as a result. In the focus groups, all agreed that those not using motorised vehicles are treated as 'second class' users with measures designed to help them sometimes described as 'tokenistic'. The speed of road traffic is often their biggest concern, exacerbated in an urban environment where interaction between those who are and those who are not using motorised vehicles can be more common and more challenging.

*"The main thing that stands out for me is that pedestrians are not by any means prioritised on these roads. That that's not the main purpose for them. We're secondary, if that."*

Pedestrian

Both pedestrians and cyclists tend to feel that lighting is inadequate for their needs, and they also complain about dirt and litter impacting on them. Cyclists recognise their vulnerability to poor behaviour of drivers but they are also critical of road design and of potholes as a particular safety hazard for them. Equestrians would prefer to keep clear of major roads altogether but, where they have to cross a road, say they'd prefer a bridge (with high sides). Safety is a major worry with a concern that the proximity of vehicles and noise from traffic may 'spook' their horse.

*"When I've had to cross over a bridge over the 'A' road and there's traffic underneath you, and big HGV lorries trying to overtake you as well, that's not a nice experience, at all."*

Equestrian

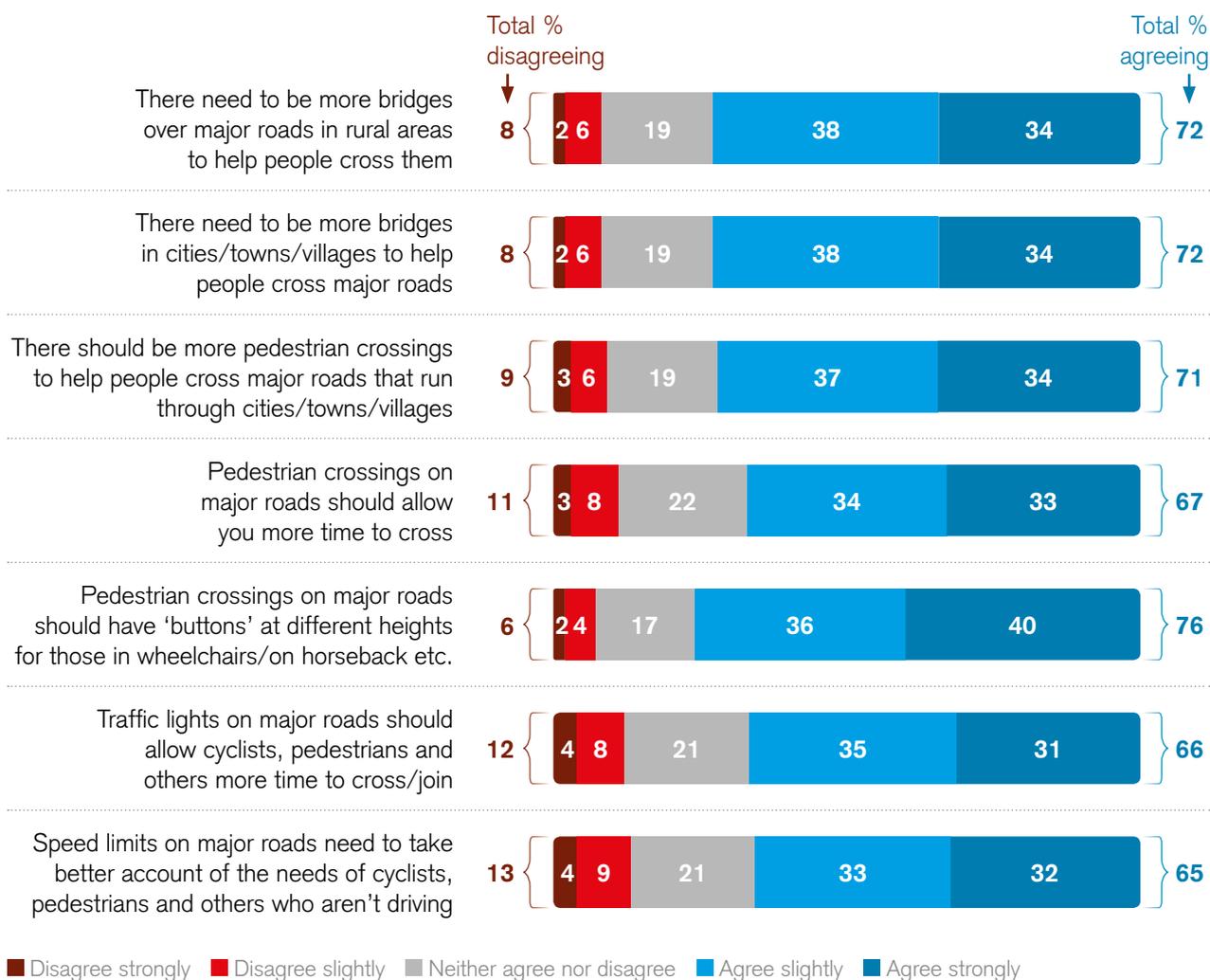


In the quantitative survey, people were asked whether they agreed or disagreed with a series of statements about crossing the network when not in a motor vehicle. The one statement to receive the highest level of support (76 per cent agreed) was having 'buttons' at different heights on pedestrian crossings for those using wheelchairs or on horseback. Most other options received only slightly lower levels of support. The lowest support was for the statements that would potentially increase journey time for motorised traffic. This included traffic lights to allow people to cross (66 per cent), pedestrian crossings allowing more time for people to cross (67 per cent) and speed limits taking better account of the needs of those who aren't driving (65 per cent).

*"A' roads are off limits for cyclists -, not legally, but wherever humanly possible I'd avoid them if I could. Single carriageway between two major towns and you don't want to be on that, on a bike."*

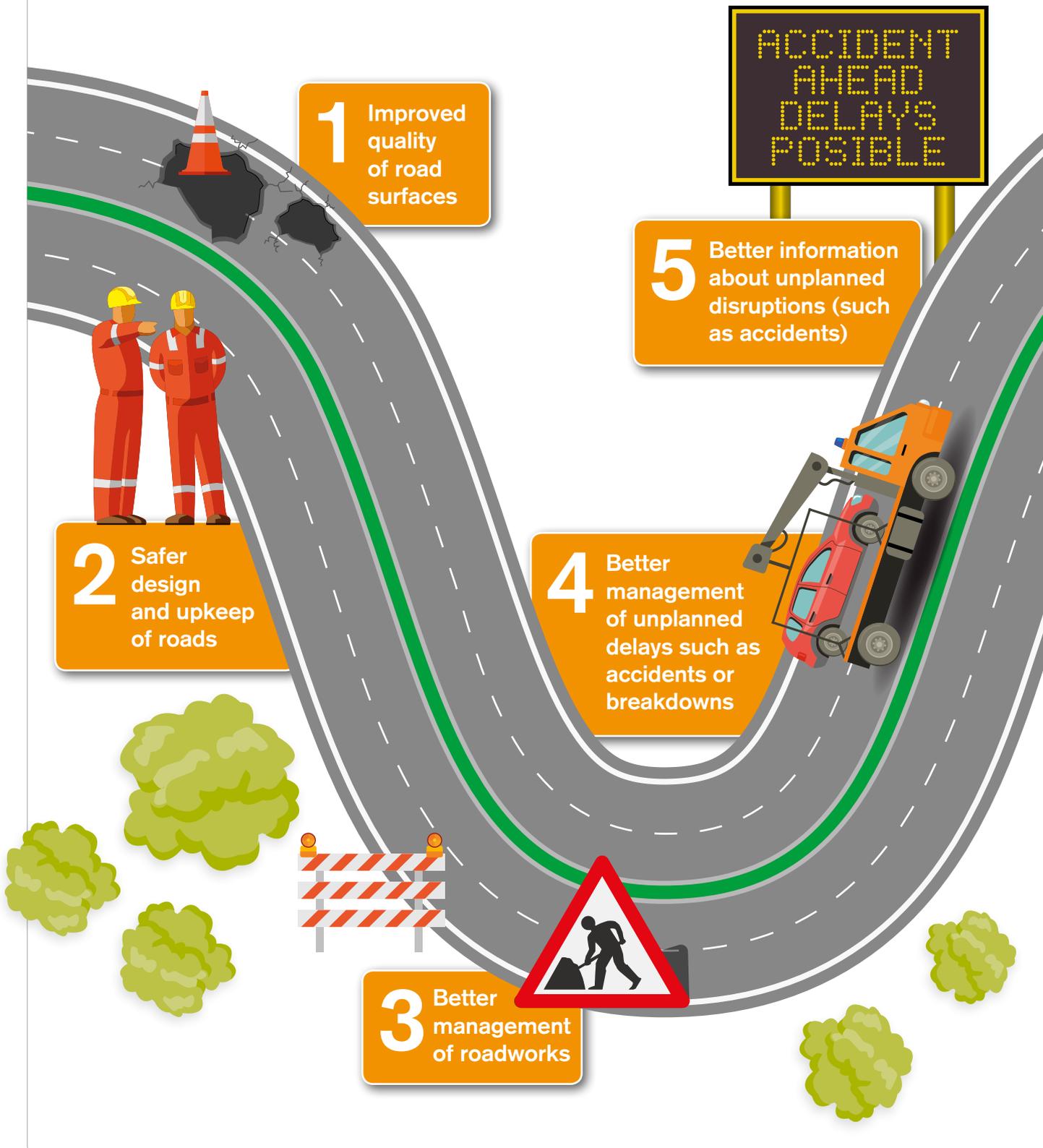
Cyclist

### Attitudes to ways of making National Highways' roads easier and safer for cyclists, pedestrians and equestrians



Q. Below are number of statements people have made relating to England's motorways and major 'A' roads, can you please tell us how much you agree or disagree with each of these statements?  
Base: All respondents (5628)

# Road users' priorities for improvement



**6** Better behaved drivers



**ADVANCE WARNING**

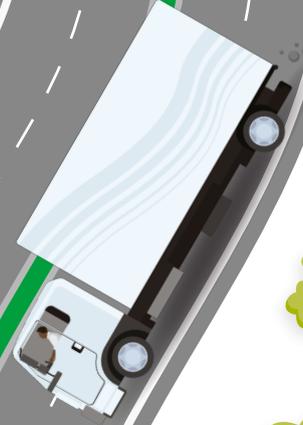
ROAD CLOSURE ON  
12/12/2021 - 16/01/2022

**7** Better information about roadworks happening in future

**8** Better lighting on the network



**9** Reduced environmental impact of road travel



**10** Better roadside facilities (service areas, laybys)



## Views about sustainability and electric vehicles

While sustainability was not top of mind for drivers in the focus groups, they acknowledge – sometimes reluctantly – that road use is environmentally harmful. Many feel they have little choice but to drive and suggest that improvement in public transport is the way to have fewer cars on the road. While road users concede that electric vehicles have a role to play in meeting environmental targets, they point out that they do not reduce congestion.

In the main survey, just over a third (37 per cent) of those car and van drivers who didn't currently drive a fully-electric vehicle said that they are likely to purchase one in the next few years. For motorcyclists (52 per cent) and coach and bus drivers (60 per cent) – probably in relation to their use of a car – the likelihood of doing so was higher.

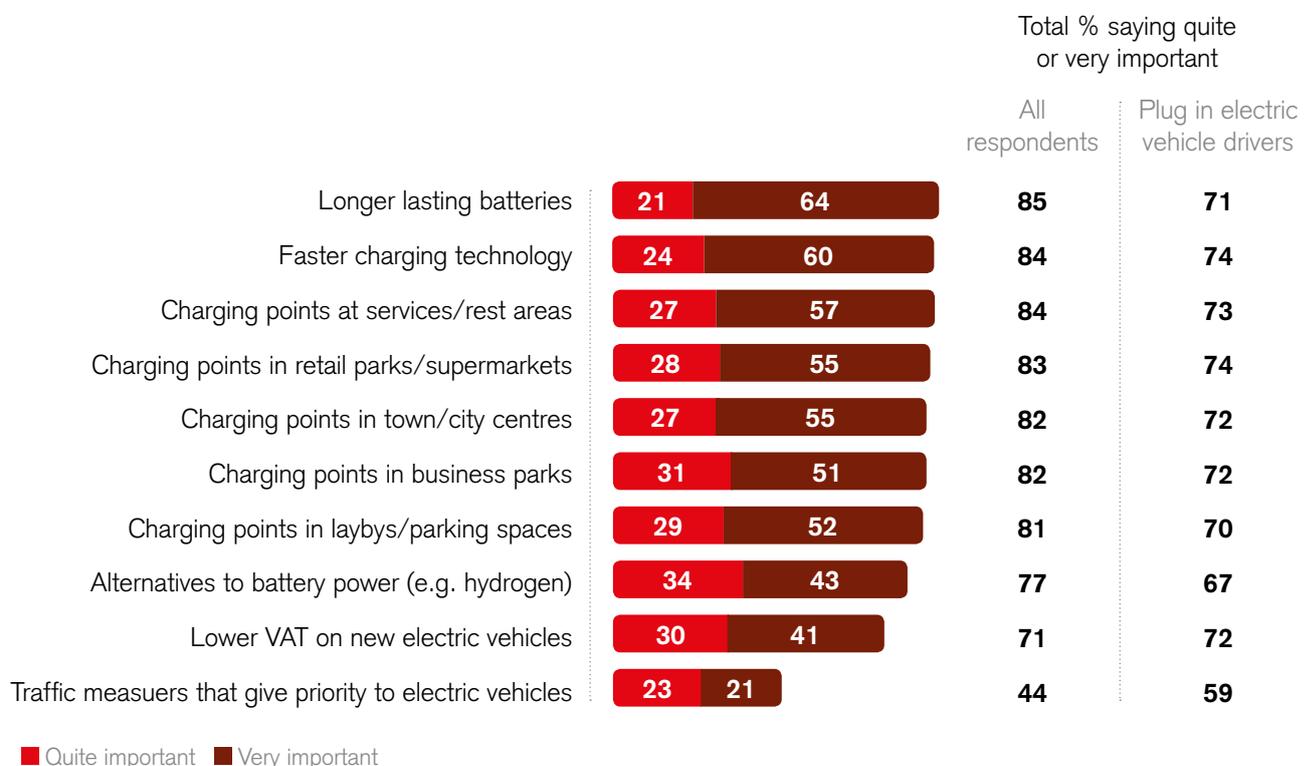
Four out of five car and van drivers (81 per cent) were aware that the law will prohibit the sale of new diesel, petrol and some hybrid cars and vans in the UK after

2030. The level of awareness was similar for lorry drivers (80 per cent) but a little lower for motorcyclists (73 per cent) and coach and bus drivers (71 per cent).

The ending of sales of such vehicles appears to be having an impact upon drivers' intentions, as half of car and van drivers (51 per cent) said that this made them more likely to purchase an electric vehicle. This increase was slightly higher among the drivers of other vehicle types and the highest figure was for coach and bus drivers (68 per cent, more likely).

Investment in longer-lasting batteries and quicker charging technology are the aspects seen as the most important of those presented. However, it is interesting to note that, generally, those who currently have electric vehicles feel less strongly that investment in these areas is important. Current petrol and diesel car users would not welcome measures to give priority on the roads to electric vehicle users.

### Importance of investment into aspects targeted at electric vehicles



Q. Given the phasing out of new petrol/diesel/hybrid cars and vans, how important do you think it is that there is investment in the following areas over the next five years?

Base: All respondents (5628); plug in electric vehicle drivers (203)

The qualitative research revealed that drivers assume financial support will be necessary to persuade people to switch to electric vehicles. At the same time there is concern that electric vehicles cannot continue to be exempt from road tax and fuel duty. In short, road users recognise that there needs to be some means by which electric vehicle owners pay for their road use. Opinions were divided over whether this should be a mileage charge, an 'electricity tax' similar to fuel duty, or a vehicle ownership tax.

The concept of a mileage charge prompted some to express concern about data privacy and increased surveillance by the state resulting from remote monitoring

through technology.

The research with freight and coach operators revealed that they expect the road network to support electrification for fleets as well as personal vehicle users. Given the scale of their operations, charging stations for electric vehicles will need to be abundant across the network to enable their uptake.

While operators may not know the overall direction of travel for technological change within their sectors (for example, electric versus hydrogen), they expect the network to support them with infrastructure reflecting the long distances they travel across the whole National Highways network.

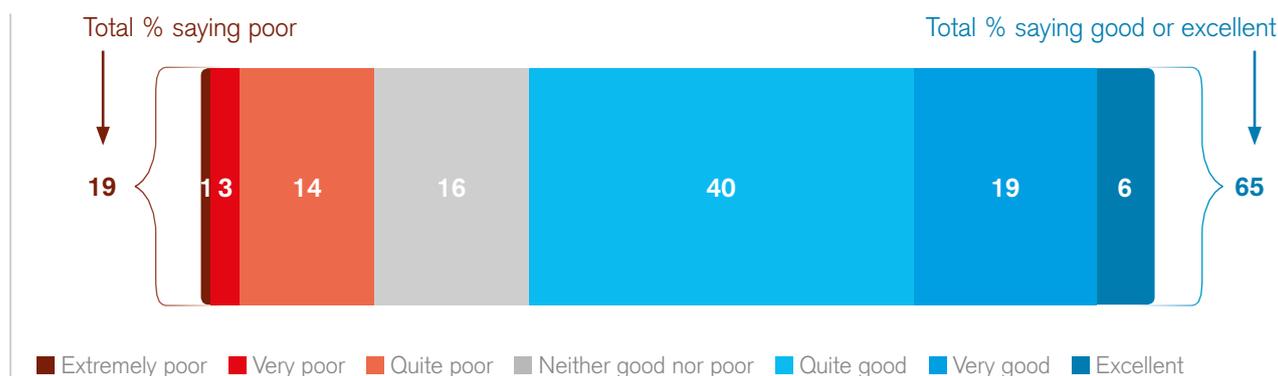
## Detailed views about road surface quality

Almost one in five car and van drivers rated the quality of road surfaces on England's motorways and major 'A' roads as poor, with potholes and cracks being the main concerns. We know from earlier Transport Focus research<sup>1</sup> that road users want a surface without dips, bumps, potholes, undulations or deep ruts – in other words continuously smooth. They also want clearer white lines and cat's eyes (which users regard as part of the surface and not something separate).

*"All they seem to do is patch it, say if there's a pothole or a winter frost. Patch it up, and three weeks later it needs doing again."*

Midlands, frequent business driver

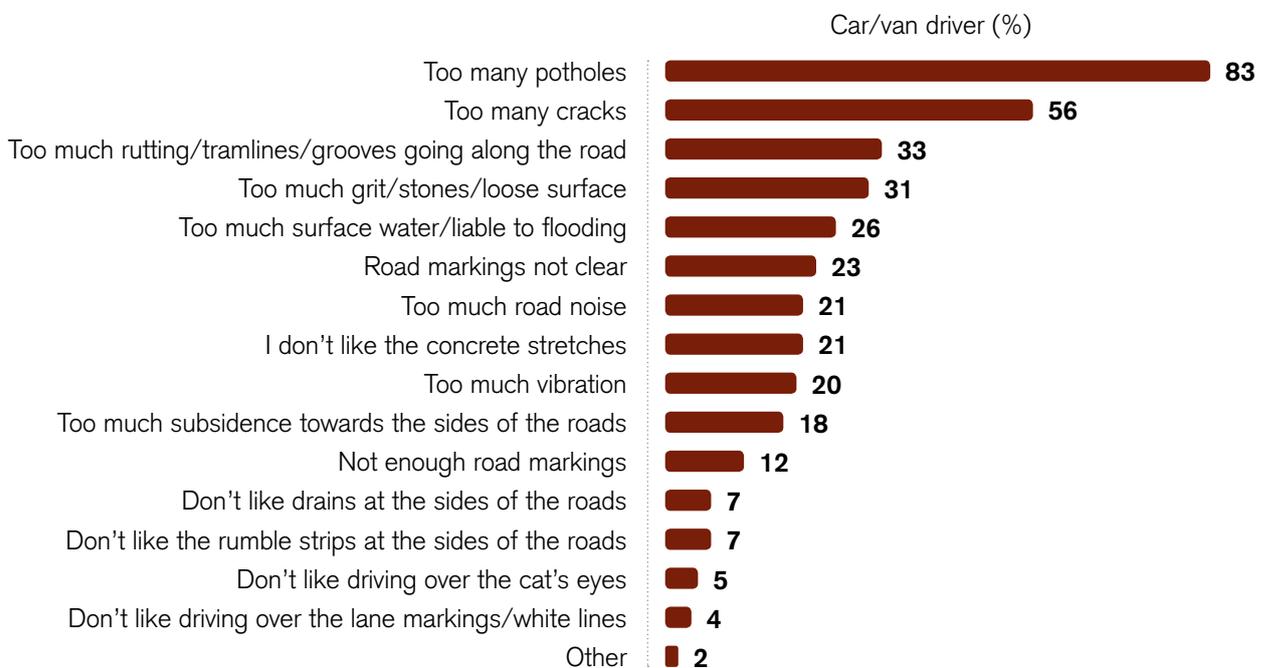
### Rating given for the quality of the road surface on England's motorways and major 'A' roads – car/van drivers



Q. Overall how would you rate the quality of the road surface on England's motorways and major 'A' roads  
Base: Car/van (4818)

<sup>1</sup> Road surface quality: what road users want from Highways England - Transport Focus <https://www.transportfocus.org.uk/publication/road-surface-quality-road-users-want-highways-england/>

**Reasons given for poor quality rating of road surface on England's motorways and major 'A' roads – car/van drivers**



Q. Why do you say the quality of road surface on England's motorways and major 'A' roads is poor?  
Base: Those rating as poor: Car/van (886)

Drivers of electric cars and vans were less critical of road surface quality, with around one in ten (11 per cent) rating it as poor (compared to 19 per cent of all car/van drivers).

For the freight and coach operators we spoke to in the expert interviews, potholes were seen as a significant problem. For them, road surface quality is usually defined as the absence of potholes and is of particular importance

for coach operators, who need to consider both the safety of their drivers and the comfort of their passengers. In line with car drivers, they see potholes as an issue that ought to have been resolved by now. It is not their top priority, since they hire professional drivers and can to some extent 'live with' lapses in road surface quality, but they do still want it addressed.

*"It's a problem for the passenger as well. If the road is shaky you don't think of the coach as somewhere you can relax or get down to some work."*

Coach operator

*"The motorways are not as well-maintained as they used to be. It may just be that they're getting older. Four or five years ago no one would mention carriageway conditions but in the last year or so it's beginning to come up."*

Industry body

# Views about National Highways' current plans and targets

The focus groups revealed that, when shown the extent of National Highways' expenditure under the second Road Investment Strategy (2020-25), people struggle with the large numbers involved but are broadly happy with the proportion of money allocated to different areas, other than those who want more to go on maintenance than enhancements.

When shown the extent of National Highways' plans and goals for 2020-25, there was a sense that they lack ambition (with some targets being simply to maintain performance at existing levels) and that the plans for 2025-2030 should make more substantive leaps forward. 'Average delay per mile to be no worse' was felt to be standing still rather than making progress, whereas '£2.23bn in efficiencies' was seen as positive – and achievable. '50 per cent reduction in people killed or injured' was seen as laudable by road users and progress since 2015 suggests to them that it should be achievable. However there was also a view that vehicle design has a role to play and so this is not something National Highways can completely control. Similarly, it was felt that the environmental goals were generally for the Government to implement rather than National Highways alone.

Freight and coach operators often feel overlooked in terms of the planning of the network. Roadworks undertaken at night may serve car drivers' needs but for freight operators this is a significant cause of delay.



National Highways

Operators point out that the general public is a stakeholder in road haulage in that people want parcels and goods delivered on time and a delay to an HGV can 'ripple out' to affect many end-customers.

## Views about reducing journey times

Car and van drivers believe better management of roadworks would be the most beneficial way of reducing journey times for them (43 per cent). This is followed by dealing with incidents more quickly and improving other drivers' behaviour (both 36 per cent). The remaining two of the top five mentions were crawler lanes for slow traffic on hills (33 per cent) and better signage on diversion routes (31 per cent).

While motorcyclists have the same top three for reducing journey times, improving other drivers' behaviour is the most important factor out of the three for them.

Commercial vehicle drivers also had the same top three. However, the differential between these and other factors was less pronounced as they tended to identify a wider range of possible solutions.

The top two factors for coach and bus drivers differ from those of others with building new roads and having better real time information (both 34 per cent) coming out top.



### Factors for reducing journey times by different driver types

|  | Car/<br>van | Moped/<br>motorcycle | HGV/<br>LGV | Coach/<br>bus |
|--|-------------|----------------------|-------------|---------------|
| Better management during roadworks                                 | 43%         | 35%                  | 37%         | 31%           |
| Deal with incidents more quickly                                   | 36%         | 37%                  | 36%         | 28%           |
| Improve other drivers' behaviour                                   | 36%         | 38%                  | 36%         | 33%           |
| More crawler lanes for slow traffic on hills                       | 33%         | 27%                  | 32%         | 25%           |
| Better signage on diversion routes                                 | 31%         | 28%                  | 34%         | 23%           |
| Better real time information on roadside signs/displays            | 28%         | 26%                  | 29%         | 34%           |
| Better advance information about roadworks to assist with planning | 28%         | 28%                  | 30%         | 27%           |
| Add new lanes to existing motorways/major 'A' roads                | 28%         | 27%                  | 31%         | 27%           |
| Introduce minimum speed limits/ban slow moving vehicles            | 24%         | 29%                  | 31%         | 33%           |
| Reduce the number of planned roadworks                             | 24%         | 24%                  | 27%         | 27%           |
| Build new roads  | 22%         | 27%                  | 22%         | 34%           |
| Increase maximum speed limits                                      | 21%         | 24%                  | 27%         | 24%           |
| Increase speed limits through roadworks                            | 20%         | 17%                  | 22%         | 25%           |
| Introduce tolls to reduce traffic levels                           | 12%         | 16%                  | 22%         | 18%           |
| Other  | 1%          | 1%                   | 0%          | 0%            |
| <b>Base size</b>   | <b>4818</b> | <b>407</b>           | <b>249</b>  | <b>134</b>    |

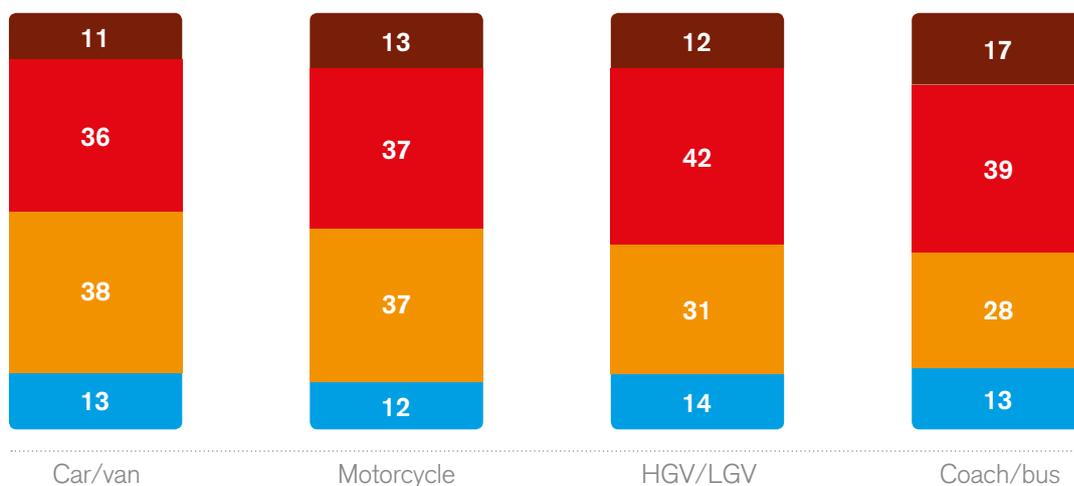
# Why driving on National Highways' roads can be stressful

Around half of drivers find it very or quite stressful driving on England's motorways and major 'A' roads. Stress levels are highest for coach or bus drivers (56 per cent very or quite stressful) and lowest for car and van drivers (47 per cent).

The behaviours of other drivers (such as tailgating, not indicating when changing lanes and driving too fast) tend to be the main causes of stress, followed by delays (related to the volume of traffic and planned roadworks). While the quantitative data tends to show that lorry drivers' behaviour is seen as better than car drivers', in the focus groups we heard various comments about the sheer size of lorries making it uncomfortable to drive alongside them. Poor weather conditions and fears of missing a turning were greater sources of stress for coach and bus drivers than for other road users.



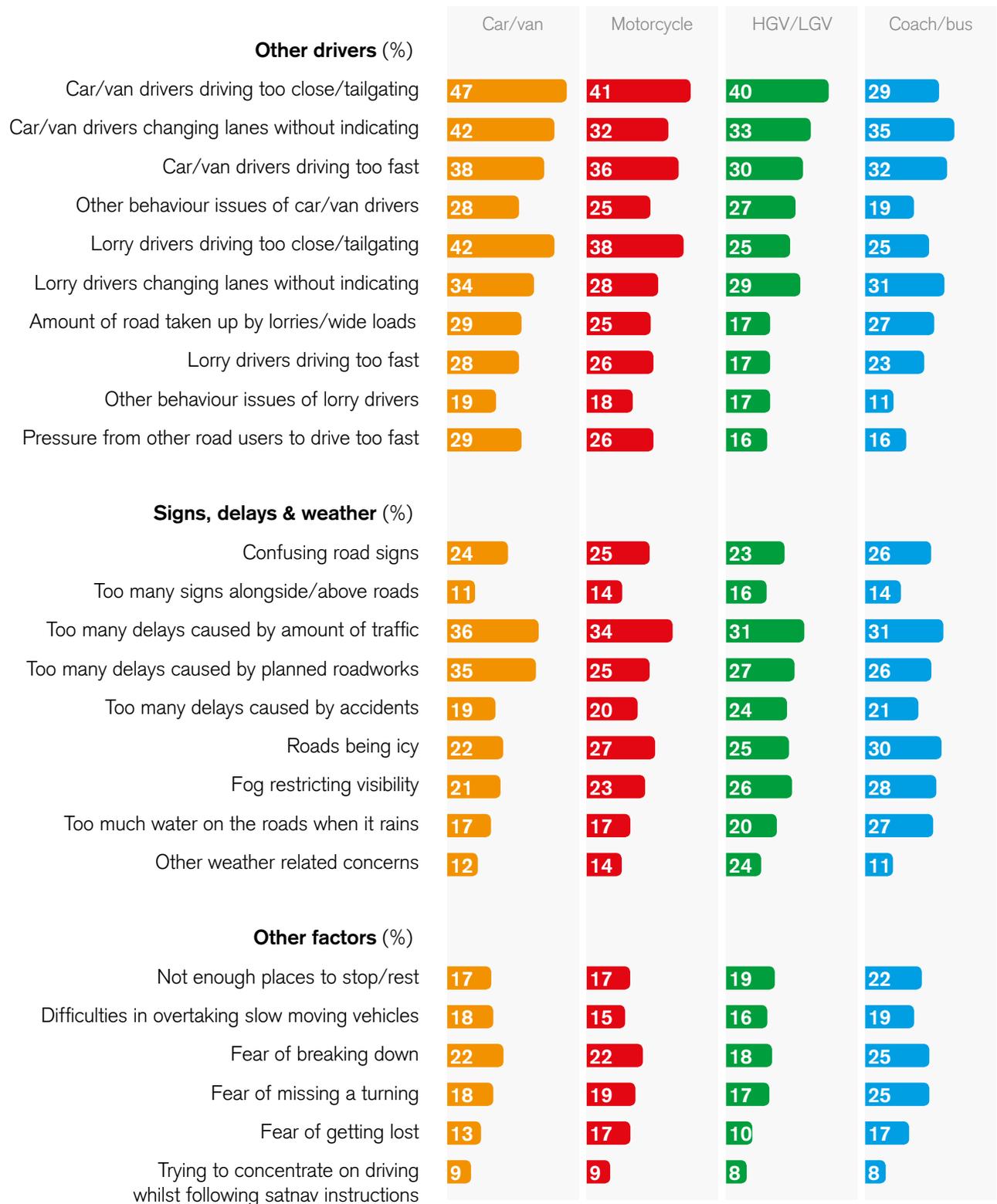
## Stressfulness of driving on England's motorways and major 'A' roads



Very stressful Quite stressful A little stressful Not stressful at all

Q. Overall how stressful do you think it is driving on England's motorways and major 'A' roads?  
Base: Car/van (4818); Motorcycle (407); HGV/LGV (249); Coach/bus (134)

**Most stressful factors when driving on England's motorways and major 'A' roads**



Q. What do you find most stressful about driving on England's motorways and major 'A' roads?  
 Base: Those that find driving stressful: Car/van (4158); Motorcycle (353); HGV (212); Coach/bus (113)

# Paying for the roads

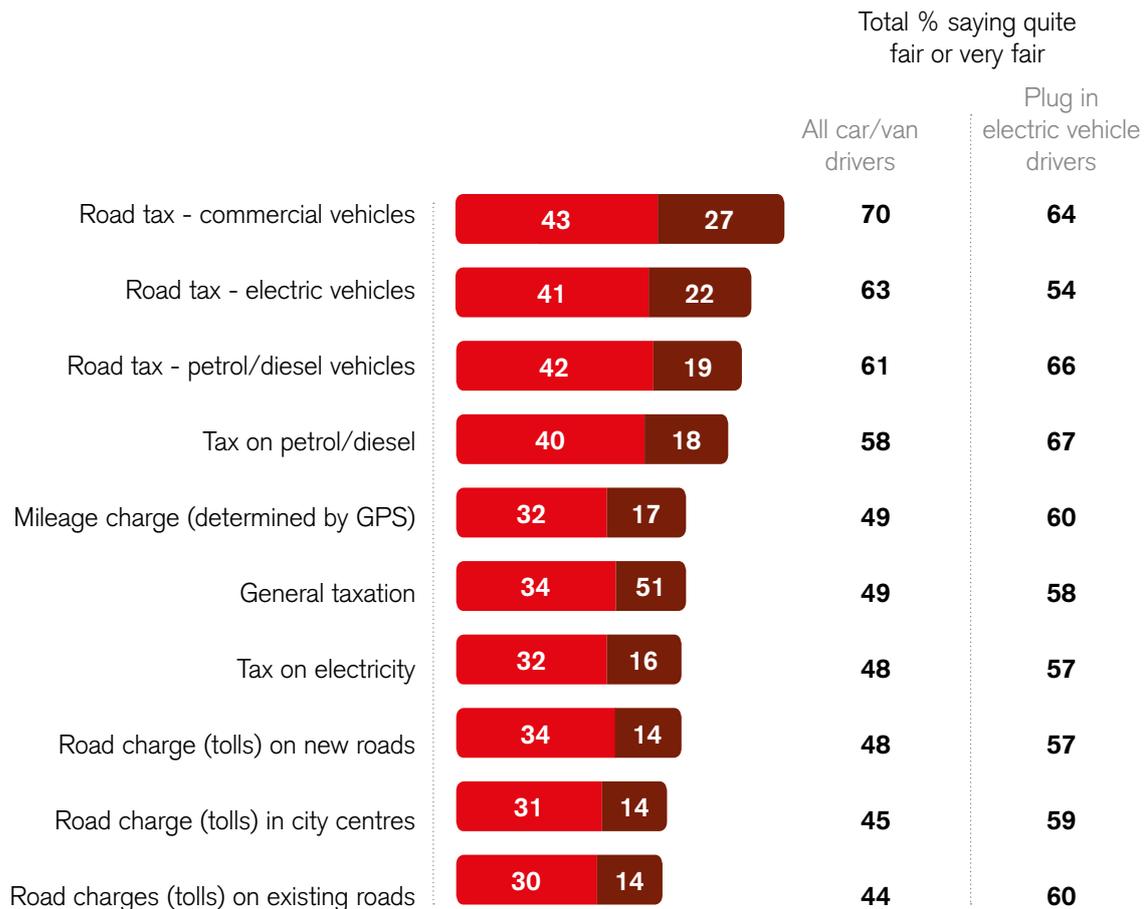
Road tax (Vehicle Excise Duty) is seen as the fairest way of paying for National Highways' network by car and van drivers. Tolls tend to be seen as the least fair (although this is less the case for those driving electric vehicles).

In terms of the perceived fairness of various funding mechanics, there is little difference between different types of road users – perhaps because many commercial drivers/motorcycle riders are also car owners/drivers. However, there is some bias in drivers' preferred methods of paying for roads towards aspects least likely to affect

them or that could lead to improvements that would benefit them. The differences worth noting are:

- lorry drivers are less resistant overall to road charging/tolls/mileage charges (they may not have to pay them personally, and perhaps also reflecting familiarity with them when driving in other countries, or seeing them as ways to reduce traffic levels)
- coach and bus drivers are more likely than other drivers to feel that city centre charging would be fair (perhaps seeing this as a way to reduce traffic levels for journeys they make into city centres).

## Fairness of ways of providing funding for the motorways and major 'A' roads in England – car/van drivers



■ Quite fair  
■ Very fair

Q. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if you think this would be a fair or unfair way of funding the roads?

Base: Car/van (4818); Plug in electric vehicle (203)

The qualitative research revealed most drivers assume that road tax and fuel duty go to fund the network and there is a fairly widespread assumption that motoring fines also contribute. While nobody likes paying any of these, the general view is that it is a fair and equitable means of paying to maintain the network. However, drivers do not know what proportion of the costs of maintaining the network are met by these taxes, nor whether the funding is ring-fenced for roads or goes into general taxation.

"Yeah, I mean not everyone uses the roads... As a car user, I should pay towards the upkeep of the roads, whereas someone who doesn't drive, shouldn't. It's expensive but fair."

Pedestrian



## Knowledge of the then Highways England

The qualitative research had suggested that road users generally have scant knowledge of how the road network is managed, nor of Highways England (as it was then known) as an organisation or its responsibilities. Most understand that local roads are looked after by councils and that central government runs the motorways. However, few understand where Highways England fits in and may

well have seen the name only on roadworks signs or patrol vehicles. As Highways England's remit and activities were explained and their views sought, it was evident that the depth of users' knowledge is shallow.

There is a widespread belief that Highways England enforces traffic law on motorways and this in turn leads to a role in managing driver behaviour. There is also an

assumption that Highways England must monitor the network, but little idea about the form this takes other than a vague awareness of traffic control centres that monitor the CCTV cameras.

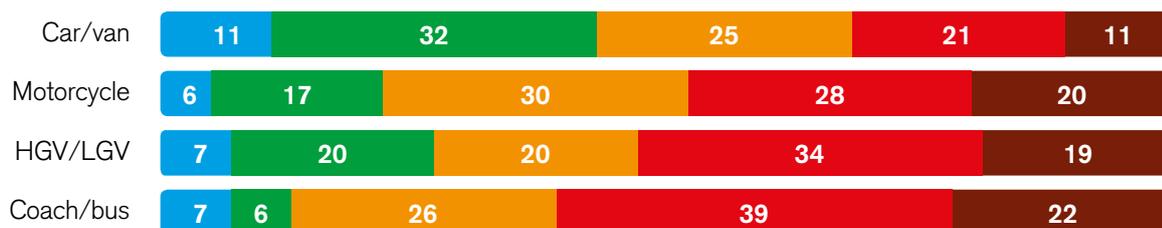
Much like private vehicle users, freight and coach operators want more of a sense of overarching control over the network from Highways England. A more visible and proactive demonstration that someone is 'in charge' and able to co-ordinate maintenance across regional subdivisions would be reassuring and it is felt it would help ultimately improve journey times.

However, the quantitative survey presented a somewhat different picture, potentially because road users had expressed their views on the whole range of Highways England's activities and felt they had more of an understanding after this. Awareness of Highways England in the quantitative survey was relatively high among car and

van drivers, with 85 per cent saying that they had heard of the organisation prior to completing the survey. The picture was similar for lorry drivers (86 per cent aware). However, levels of awareness among motorcyclists and coach and bus drivers were a little lower (at 78 per cent and 77 per cent respectively).

Those who had heard of Highways England were asked what they knew about the organisation's investment plans. Just over half of car and van drivers (57 per cent) said that they had heard or seen information about Highways England's investment plans, although for many this was only a little information. For lorry drivers and coach and bus drivers the results were more positive. The majority (63 per cent and 87 per cent respectively) had heard or seen information about the investment plans and over half had heard or seen either some or a lot of information (53 per cent and 61 per cent respectively).

### Awareness of Highways England's investment plans



■ Heard/seen a lot of information about the investment plans ■ Heard/seen some information about the investment plans  
 ■ Heard/seen a little information about the investment plans ■ Heard/seen nothing about the investment plans ■ Don't know

Q. And what, if anything, do you know about Highways England's investment plans for the future?  
 Base: Those aware of Highways England: Car/van (4000); Motorcycle (317); HGV/LGV (214); Coach/bus (103)

*"Let's say we're doing a journey from Carlisle to Birmingham, that's one journey, but it passes through three different Highways England regions, and they have absolutely no obligation to make anyone in the other regions aware that work is happening. It turns a four hour journey into a six hour journey."*

Freight operator

Most drivers (79 per cent) felt that it was important to have greater awareness of Highways England's responsibilities. Motorcyclists were the most likely to feel this way (86 per cent). Around three quarters of drivers (74 per cent) felt that it was important to know how to contact Highways England. Motorcyclists and lorry drivers (both 80 per cent) were the most likely to feel this way.

## How we carried out the research

### Qualitative research among drivers and other road users

The qualitative research was conducted by Illuminas in November/December 2020 and used to inform the design of the quantitative research that followed. A total of 14 focus groups were conducted online with a mix of frequent and infrequent car, van and motorcycle users driving for leisure or for business and covering the seven (counting the M25 separately) National Highways regions. Additional focus groups were conducted with lorry drivers, cyclists, pedestrians (one group focussing on urban and the other on rural use) and equestrians. A further 10 depth interviews were undertaken with drivers with disabilities.

### Qualitative expert interviews

Illuminas also completed 10 depth interviews with senior managers working for freight and coach operators or trade bodies representing these sectors. These interviews were conducted in March/April 2021.

### Quantitative research among drivers

The quantitative survey was conducted by Savanta, using its online panel, from 10 – 26 March 2021.

They interviewed a total of 5628 drivers all of whom had driven/ridden a motorised vehicle on the Strategic Road Network (SRN) in the preceding six months or had done so prior to Covid-19 restrictions being put in place in March 2020.

Sample boosts were applied during recruitment to ensure the following targets were achieved:

|                                       |               |                        |
|---------------------------------------|---------------|------------------------|
| • Car or van drivers                  | target = 4650 | achieved = <b>4818</b> |
| • Motorcycle or moped riders          | target = 350  | achieved = <b>407</b>  |
| • HGV or LGV drivers                  | target = 250  | achieved = <b>249</b>  |
| • Coach or bus drivers                | target = 100  | achieved = <b>134</b>  |
| • Plug in electric car or van drivers | target = 100  | achieved = <b>203*</b> |

\*electric car/van drivers are included as a subset of the 4818 car/van drivers.

Anyone who said they ever drive a coach/bus on the SRN was asked about journeys made when driving these.

Anyone who said they ever drive an HGV/LGV was asked about journeys made when driving these.

Car/van drivers (including electric vehicle drivers) were defined based on driving these vehicles for their typical journeys on the SRN.

Initial data showed that motorcyclists tended to be taking part in the survey as drivers of other vehicles they use. Therefore, the approach to this group was changed during the fieldwork period so that all motorcyclists were asked about journeys on the SRN when riding their motorbikes rather than when driving other vehicles.

Where respondents drove multiple vehicles, they were allocated based on the priority order of coach/bus first, HGV/LGV second and motorbike third.

The data for car and van drivers was weighted to match the SRN user profile in the Office for National Statistics Opinions and Lifestyle Survey 2013 (as was the case in our 2015 research) as this remains the most recent publicly-available source of information. The region weighting was based on region of residence, while the survey respondent region was based upon the regions in which drivers had driven on the SRN.

The weighting targets are shown below:

| Age   | %   | Gender | %   | Region                 | %   |
|-------|-----|--------|-----|------------------------|-----|
| 16-24 | 7%  | Male   | 56% | North East & Yorkshire | 14% |
| 25-44 | 34% | Female | 44% | North West             | 16% |
| 45-64 | 36% |        |     | Midlands               | 20% |
| 65+   | 24% |        |     | East                   | 13% |
|       |     |        |     | M25                    | 7%  |
|       |     |        |     | South East             | 18% |
|       |     |        |     | South West             | 12% |

As users could drive through multiple regions the data was weighted based on total number of journeys made.

M25 usage within the data was higher than expected. For weighting and reporting purposes only those who said they travelled only on the M25 (or M25 spur roads) and not on other roads outside it were included in the M25 data. Those who drove in the east or south east and M25 were included in the east and south east data.

The potential impact of Covid-19 on travel patterns at the time of the research meant it was possible that drivers were either not currently using the SRN, or else were using it for different journey types than before the pandemic. Therefore, the approach differed a little from that used in the 2015 survey. In the 2015 survey, participants had been asked to think about their most recent journey, whereas for the latest survey, participants were asked to think about a 'typical' journey. How the timeframe for this typical journey was defined depended upon past, current and anticipated future use of the SRN, as follows:

| Used SRN pre-March 2020 | Used SRN in past 6 months | Expected future use of SRN                    | Reference point for typical journey                   |
|-------------------------|---------------------------|---|---|
| Yes                     | No                        | More like pre-March 2020                      | Think about a typical journey <b>pre-March 2020</b>   |
| Yes                     | Yes                       | More like pre-March 2020                      | Think about a typical journey <b>pre-March 2020</b>   |
| Yes                     | Yes                       | No change in usage or more like past 6 months | Think about a typical journey in <b>past 6 months</b> |
| No                      | Yes                       | More like past 6 months                       | Think about a typical journey in <b>past 6 months</b> |

While previous studies have shown an almost even split of drivers making journeys of under 10 miles and those of more than 10 miles, a different profile was seen in the latest study:

- under 10 miles = 20 per cent
- over 10 miles = 80 per cent
- of which 10-30 miles = 40 per cent.

As such, the results of this survey have been analysed in terms of those making journeys up to 10 miles, those making journeys of 10-30 miles and those making journeys of more than 30 miles on the SRN.

Initial results also demonstrated a difference in the commuter, business and leisure profiles compared to previous research. Given the 'stay at home' advice that was in place at the time of the research (and in the months preceding it), it is not surprising that commuting journeys were more prevalent than business or leisure journeys. However, quotas placed upon the recruitment increased the number of leisure users which meant the final profile was closer to expected usage post-Covid than would otherwise have been the case.

## Contact Transport Focus

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