



Illuminas
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Road users' priorities for improvement

Prepared for Transport Focus

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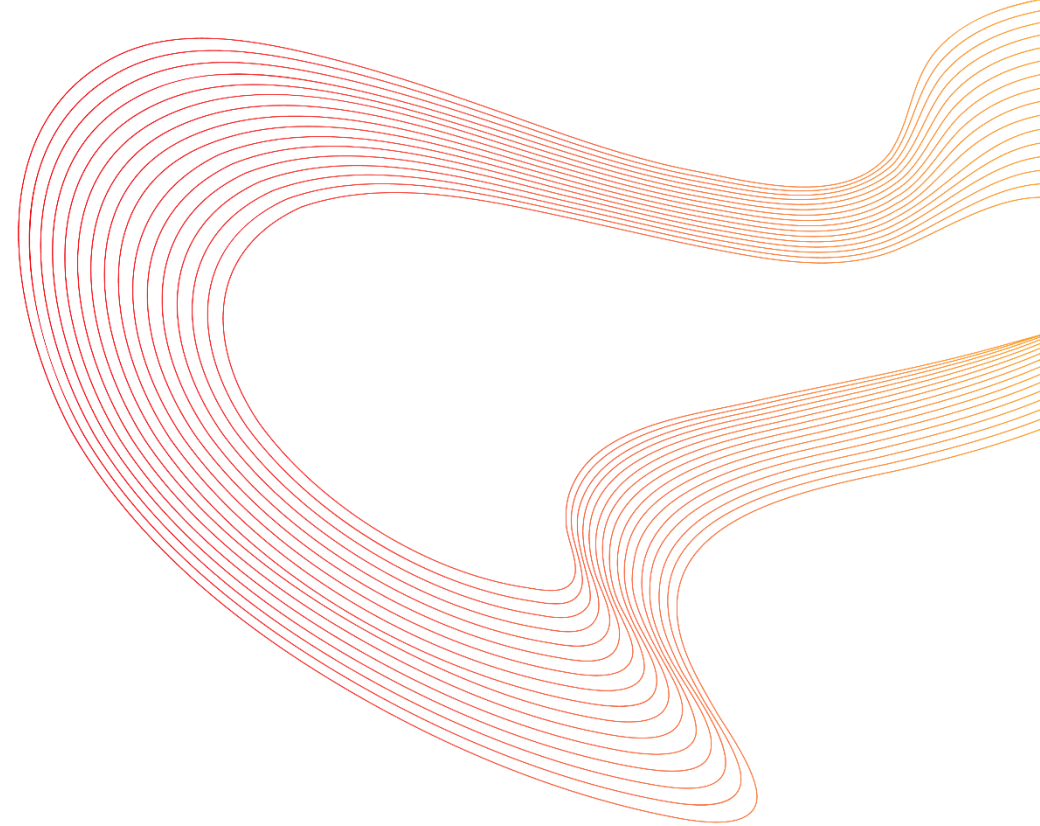
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Background and research objectives

Transport Focus is looking to understand road user needs from the third Road Investment Strategy (RIS 3)

- We are at the beginning of the **second Road Investment Strategy (RIS 2)** which runs from 2020 to 2025. This study looks to understand what road users would like to see prioritised in the **third strategy covering 2025 to 2030 (RIS 3)**.
- Ultimately, to help inform the development of RIS3 Transport Focus intends to carry out a large-scale survey to **quantify** road users' priorities for improvement.
- This qualitative research, therefore, is intended to explore what road users value, and how they would want to see those priorities measured. **What does success look like, in their view?**



The research objectives can be divided into three broad themes



Diagnostic Objectives

- Are the priorities identified in previous quantitative research sufficiently comprehensive, valid and relevant? Is anything missing? Is anything redundant?
- What new priorities have emerged as a result of recent health, economic and social trends (including COVID-19) if any?
- By what parameters do road users feel these concepts ought to be measured?



Clarification Objectives

- How do road users respond to competing priorities, and allocating budget between maintenance and renewal of existing roads, or upgrading them and building new ones?



Deliberative Objectives

- What do road users know about how the road network is funded, and the various alternative forms that may be introduced?
- What impact has COVID-19 had on road use? Will those switching from public transport to cars switch back? If so, when?
- Have questions around sustainability filtered into road users' minds and what is the potential, or desired, impact on driver behaviour?

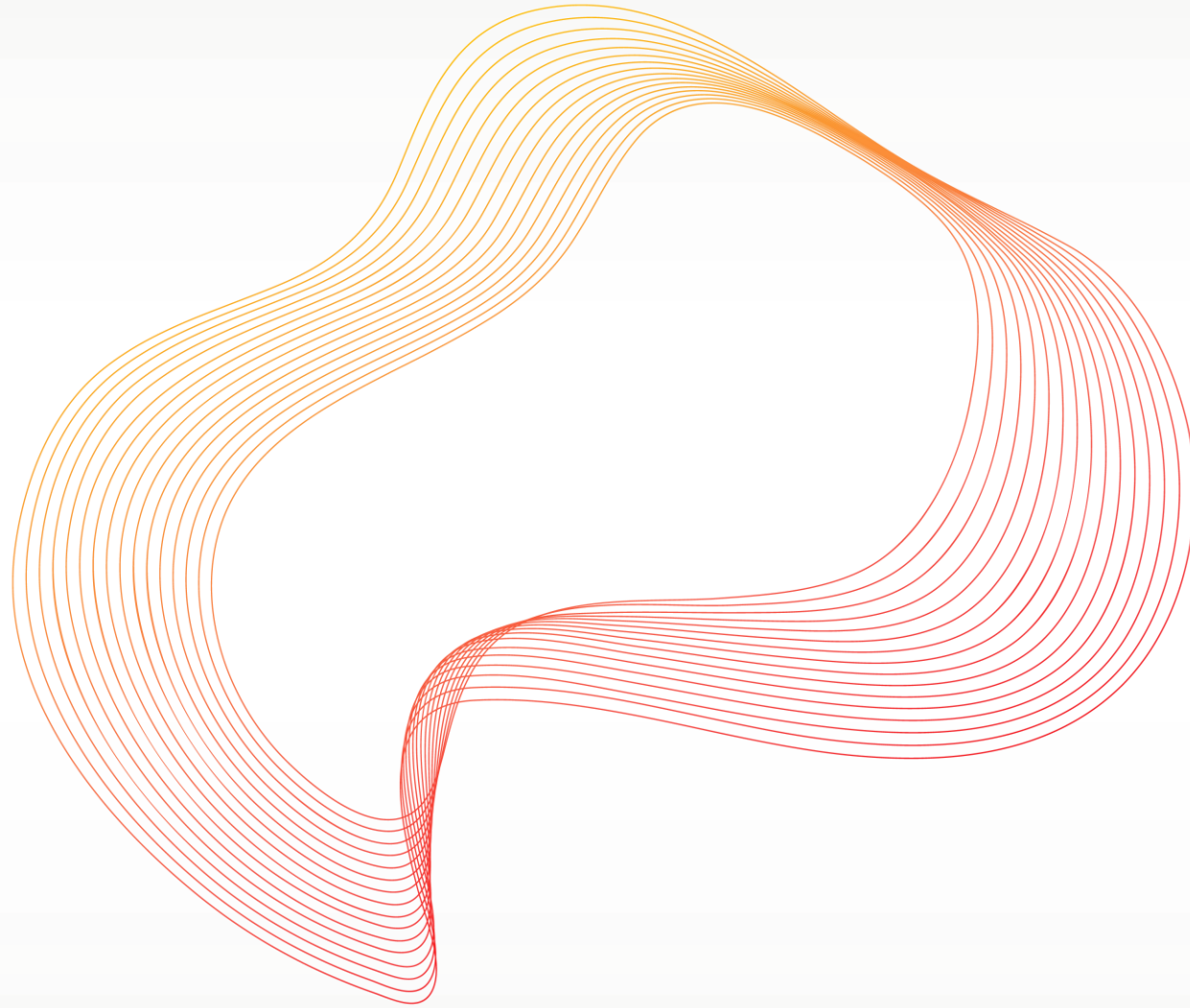
Illuminas conducted 19 focus groups with SRN users, including cyclists, pedestrians and equestrians

Region	Journey Purpose	Journey Frequency
South West	Leisure	Infrequent
	Business	Frequent
North West	Leisure	Frequent
	Business	Infrequent
Yorkshire and North East	Leisure	Infrequent
	Business	Frequent
East	Leisure	Infrequent
	Business	Frequent
M25 Area	Leisure	Frequent
	Business	Infrequent
South East	Leisure	Frequent
	Business	Infrequent
Midlands	Leisure	Infrequent
	Business	Frequent
Additional group with lorry drivers across all regions	Additional focus groups with pedestrians, equestrians, lorry drivers and cyclists to be drawn from across the SRUS regions.	
Urban Pedestrians		
Rural Pedestrians		
Equestrians		
Cyclists		

Additional fieldwork:




10 Depth interviews with road users with disabilities

8 Expert interviews with fleet operators and industry leaders (to be completed)



Key themes

Key themes from the research:

	Low salience: The road network tends to be experienced rather than evaluated critically. Respondents were not accustomed to ‘critiquing’ the network and for many, particularly less frequent users, the issue of how the road network is managed is far from top-of-mind.
	General satisfaction: Most users are satisfied with their journeys, most of the time. There are underlying frustrations but many have become accustomed to the prospect of delay, and leave a ‘buffer’ to account for traffic congestion.
	Local affinity: Respondents primarily evaluate the network based on their own experiences of the road. While there is sympathy for vulnerable road users, those living near the motorway, or those in remote regions, most would rather see benefits for <i>their</i> journeys rather than benefits for the network as a whole.
	Limited understanding: Awareness of how the road network is funded and managed is low. While the road network is indeed understood as a ‘network’ of sorts, there is very thin understanding of who manages it, and this can leave many to assume that interventions like roadworks happen almost at random, without a plan and without transparency.
	Highways England’s role: Many respondents want to see more information about what Highways England does, not just around the day to day issues of roadworks or congestion, but also in terms of broader strategy. Road users – and particularly cyclists, pedestrians and equestrians – feel somewhat ‘voiceless’ and a lack of understanding about who is in charge is felt to exacerbate this.
	Demand on the network: Many point to COVID-19 as a likely trigger for increased demand on the road network as people move away from public transport. It leads some to reflect that they would rather see demand reduced, than have a cycle of increased demand, increased supply (and the roadworks to deliver it), leading to increased demand.
	Change is inevitable: Awareness of the government’s sustainability agenda, the rise of electric vehicles, and changes in information technology was high. Everyone knows that ‘things will be different’ in 2030 and they expect the road network to account for this, even if they do not feel able to predict the full implications of those changes.



Experiences of the road network

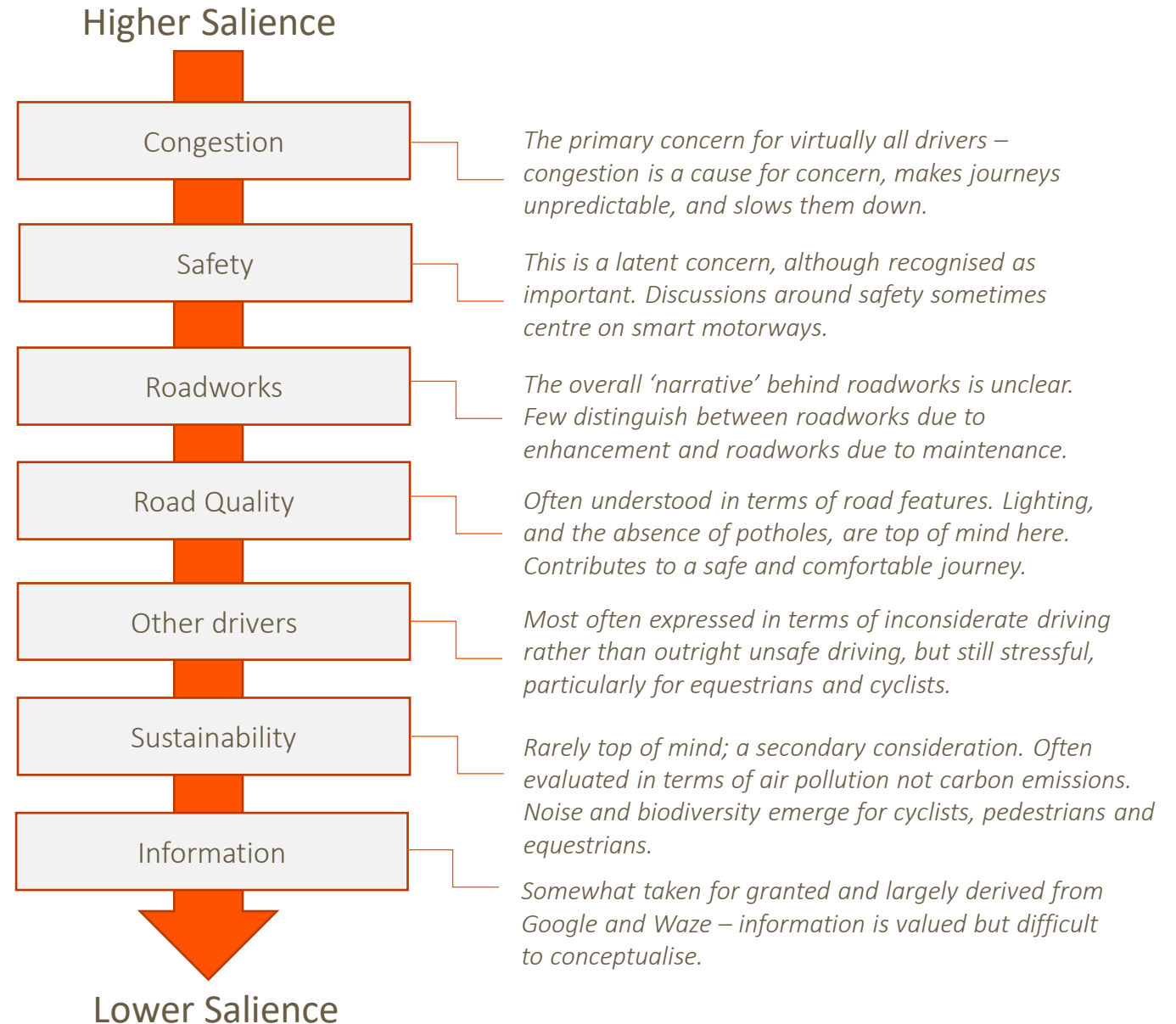
What is top-of-mind for road users?

We recruited people who drive on motorways and major 'A' roads in England. By definition, none of our respondents are outright avoiding the road network.

Road users' evaluation of the SRN is in relation to their day-to-day use of it; they rarely cast their mind forward to make an overall evaluation of the 'success' of the network.

On a journey-by-journey basis, road users simply want to get to their destination on time and with a minimum of stress.

It is important to note that salience is not the same as importance. Very few (when prompted) would put addressing congestion before addressing safety, but when driving on the motorway day-to-day, this is the broad hierarchy of salience and relevance.



Journey time and the overall smoothness of the journey are top-of-mind for many

Successful journeys are heavily dependent on congestion and roadworks

While a minority of respondents are frustrated by lower speed limits than they want, most understand journey time in the context of 'smoothness'. They do not evaluate their journey based on whether they are able to go fast, but whether they are being made to slow down.

Many road users would sacrifice some journey speed in the name of a more predictable experience – particularly if this is on the basis that such an approach would help with safety and the management of traffic. **Going slowly is less stressful than being at an absolute and unpredictable standstill.**

Road journeys on the SRN are experienced, rather than consciously evaluated

When shown the SRUS questionnaire, respondents were surprised. Few had previously thought about the fact that these factors could be measured and controlled.

'Congested' is probably the main word I'd use. It is bumper to bumper most times because I'm travelling at peak times, even during COVID. They're just back to what they were before the first lockdown now.

M25 Area, Business, Infrequent

And equally, I don't see how it can be managed. People are opting to use their car over public transport now and there isn't an easy remedy for it.

M25 Area, Business, Infrequent

While safety is seen as important, on reflection, most drivers feel safe on the motorway

- While the most spontaneous frustrations with the network lie with congestion, when prompted, **safety is seen as very important in the operation of major roads.**
- Few drivers we spoke to **feel unsafe** on the road network. Respondents were recruited based on their usage of the SRN – all have opted into using the network and would be unlikely continue to do so if they felt actively unsafe.
- That said, safety is an **underlying anxiety**. News reports and ‘horror stories’ in the media can bring this anxiety to the forefront.
- Many respondents had at least second-hand experience of a **major accident** and the underlying assumption is that even small lapses in driver behaviour can lead to a collision.
- Some feel that some smart motorway features (e.g. the lack of a hard shoulder) make their journeys less safe. For others, however, the smooth running of these roads is an important benefit that helps drivers feel comfortable.

You could be the safest driver in the world but what about everyone else on the road? There's only a certain amount that's in your control.

South East, Leisure, Frequent

Now that they've brought in Smart Motorways...I think they're dangerous. Some people are doing 70 and some people are doing 40 and you don't know what to do.

Midlands, Business, Frequent

Roadworks often feel unjustified, and are a source of confusion and frustration

There is no sense of an overall 'narrative' behind roadworks being conducted

- To most road users, roadworks emerge somewhat **out of the blue**. The rationale behind why they are being undertaken, and the benefits road users might expect to see, are unknown.
- As a result, few, if any, distinguish between roadworks that are being undertaken to deliver an enhancement versus to maintain the existing road. In the moment, it simply presents as **'digging up the road again.'**

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

For many, the frequency of roadworks can make the network feel out-of-date

- Road users argue that a modern and well-designed network shouldn't need to be maintained as frequently as it appears to be. Congestion due to maintenance feels like something of a legacy issue, something that surely **ought to have been improved upon by now**.

There will have to be more maintenance of the roads. There hasn't seen serious traffic for nine months now because of COVID so they need to check to make sure everything is fine and dandy.

South East, Frequent, Business

Road users do not distinguish between local council roadworks and Highways England roadworks

- In evaluating their satisfaction with road maintenance, many draw upon their (negative) experiences of local and more residential roads being maintained.
- There is scant awareness of when roadworks are due to happen, what **impact** they will have, and what mitigation the driver can take. Congestion due to maintenance is almost always an unpleasant surprise.

When they do roadworks it all seems to come at once, rather than scattered. I get that it might be convenient for them, but even if you leave 15 minutes early you could be half an hour late.

Vulnerable driver

Out of all possible road features, lighting emerged spontaneously as a major factor in a comfortable SRN journey

The fieldwork took place between November and December 2020

As a result, it is likely that many road users' journeys were made in the dark, potentially giving lighting a greater sense of importance than it would at other times of the year.

However, across all locations, and particularly for vulnerable users, a well-lit road network was seen as vital. Lighting can add to drivers' sense of safety; it also contributes to a sense of wellbeing and confidence while driving.

Consistent lighting also feels like something that a modern road network 'ought' to have

While lighting was not felt to contribute positively or negatively to the overall outcome of a journey, it was a top-of-mind frustration for some. It feels inherently 'wrong' that sections of the road network that they travel on are poorly lit.

Even if they do not feel unsafe explicitly, there is an underlying concern that a less well-lit section of the road network could be more accident-prone. Having only 'cats eyes' did not feel sufficient.

You're much more nervous without lighting aren't you? And it might mean you won't drive the way you should, if you're a bit panicky. But you're just thinking 'what do I do?' I worry that I might be a problem for other people.

**Midlands, Frequent,
Business**

Actually when I've gone on the motorways the lighting is terrible at night and I think that can cause accidents... I think a little tweak there could make a big difference.

**Yorkshire and North East,
Frequent, Business**

Other drivers' behaviour can be a stressful, particularly for cyclists, pedestrians, equestrians and disabled road users

Road users argue that no matter how well-designed the system is, it is impossible to control for irresponsible or outright unsafe behaviour.

This usually manifests as...



Speeding



Middle lane hogging



Lane switching

For cyclists, pedestrians and equestrians, the main concern is about an overall lack of consideration that leaves them feeling invisible.

This often includes...



Aggressive behaviour



Sounding the horn



Tailgating

For all users the category of traffic also matters. Many report lorries being particularly stressful to drive alongside.

Questions on sustainability reveal the importance of public transport to road users

Sustainability is rarely top-of-mind for road users

- Drivers (sometimes reluctantly) accept that road use is environmentally harmful but struggle to establish what they or those in charge might be able to do about it.
- A common refrain among these respondents was that they are not driving by choice. They have evaluated their options and see it as their only viable option for the journeys concerned.
- Air pollution was cited as the most important environmental consequence of road use, with little reference to carbon emissions. Noise pollution was a close second – there is real empathy with those who live close to the network and many imagine that the noise level would be unpleasant.
- Biodiversity did not emerge as a major concern. The volume of green space around the road network is not immediately obvious, though some reflect that they enjoy the countryside views on their journeys.

I think there is a role for nudging people away from cars with pricing but only when they have a genuine alternative option.

South West, Leisure, Infrequent

Road users would rather see public transport being improved than electric vehicles

- This is, in part, a product of misconception. Road users often assume that electric vehicles will be unaffordable well into the future.
- But they also understand that electric vehicles do not solve congestion. Many argue that they would rather see would-be drivers diverted to bus and train than see vehicle numbers continue to rise.
- There are high expectations here. Even when informed of Highways England and its remit, many expect them to actively promote and co-ordinate with public transport bodies to ensure greater modal diversity. Few know what this might look like in practice, however.

If we do need to rely on public transport more, then it needs to be massively improved. Shift workers - I finish at three in the morning, it's snowing – I just want to go home and I don't want to wait for a train. It's going to be delayed. Or it could be full.

South East, Leisure, Frequent

While seldom thought of spontaneously, information on and about the road network emerged as a key priority

- There is some concern about ‘information overload’ on the road network. In the context of having to contend with other drivers, ensuring that they turn off at the correct junction, and other more ‘in-the-moment’ concerns, processing information (including signage) while driving can sometimes contribute to stress.
- But road signage, in and of itself, is generally thought to be helpful and appropriate.
- Dynamic signage on smart motorways’ overhead gantries was well-liked. This information was generally seen as succinct, relevant and well-presented.
- Digital, on-demand or advance information, such as apps like Waze, are increasingly popular. Drivers are looking for proactive information that is tailored to their journey. Respondents are **platform-neutral**. They do not necessarily mind how this information comes to them, whether via Google Maps, Waze etc. but they do value the underlying data coming from a reliable source, such as Highways England.
- Recent developments in information technology have given drivers a sense that they have more control over the planning and execution of their journeys and expectations have heightened.

I think that’s a really good idea that – just having more instant access to what’s happening on the network, just to make you safe.

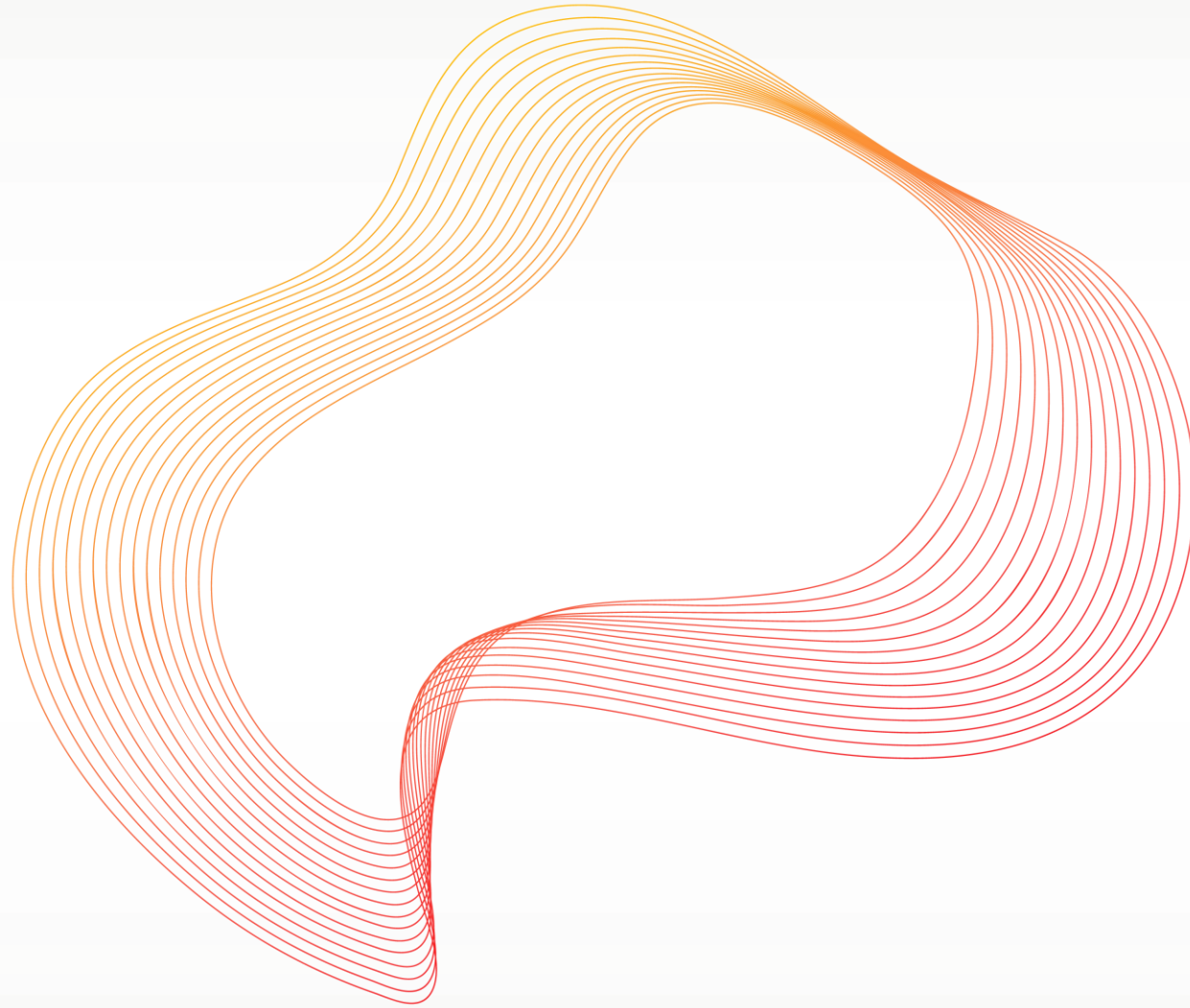
**Yorkshire and North East,
Business, Frequent**

I’ve noticed, when I’m driving on ‘A’ roads in particular I don’t get updates for roadworks. It’s really annoying. It’s guesswork, a lot of the time on the roads.

Vulnerable driver

Maybe it’s because I travel at weekends and I can pick and choose when I go, but I feel safe and it’s better now than it used to be. You get more notification of roadworks, the variable speed limits are reasonably effective in controlling flow. Before, you’d just turn up and see what happens.

**South West, Leisure,
Infrequent**



Cyclists, pedestrians,
equestrians and
disabled road users

Cyclists, pedestrians and equestrians have a fundamentally different perspective to drivers



Safety and the overall environment of the road network take on much more importance

In this context, safety is often seen as a function of speed limits and driver behaviour. It can lead many to argue for lower speed limits in areas of the network where cyclists, pedestrians and equestrians can be found.

Road surface quality is naturally less of an issue (cyclists aside), but the overall 'environment' is seen as crucial. Lighting makes cyclists, pedestrians and equestrians feel safe, and complaints about litter and dirt along the network were common.

Again, cyclists, pedestrians and equestrians do not distinguish between local councils and Highways England – it is someone's responsibility to make the network clean and pleasant to use, but they do not know whose.



Cyclists, pedestrian and equestrians are often drivers as well – and this has a particular bearing on questions of funding

As a result, questions of funding often lead cyclists, pedestrians and equestrians to think about their position as drivers, rather than as cyclists, pedestrians or equestrians. They are sympathetic with the idea of road tax being used to fund the roads since they see their impact on the network as cyclists, pedestrians and equestrians (from a pollution or 'wear-and-tear' standpoint) as essentially nil.



Many feel that the roads are designed for drivers and that everyone else is a 'second class' user

Cyclists in particular point to a sense of tokenistic behaviour from those in charge. They argue that a cycle lane may be implemented, for instance, but it will be short and insufficient.

When shown the amount going to designated funds, this can also feel insufficient. They read the £528m as 'their pot' of funding and do not always recognise that other sources of funding could be to their benefit as well.

It's not a pleasant experience at all. Nobody wants to go on a nice little jolly hack on an 'A' road.

Equestrian

Roads seem to be constantly under repair, and no better for it, and in the winter the quality of the roads becomes much worse for cyclists.

Cyclist

Pedestrians argued that they were 'second class' users of the road

Many of those using footpaths along the SRN argued that they felt unsafe

Similarly, many using footpaths on the SRN *live near the road network as well*. As a result noise pollution is one of the most apparent and high-salience issues they encounter. There is also some latent concern around air pollution.

Rural pedestrians often pointed out that lighting was insufficient for their needs

The connection between lighting and safety is far stronger among pedestrians than among motorised users. For cyclists, pedestrians and equestrians, a lack of lighting can also pose safety concerns around crime and anti-social behaviour.

Urban users can feel un-represented and un-cared for

Urban pedestrians were surprised to be asked about their feelings towards the road network. While everyone knew that there were things they would change, few knew that they were 'changeable.' Even more than rural pedestrians, these users feel like something of an afterthought.

The overall 'environment' of the road network was a vital priority

Litter, mess, crime, lighting all have significant importance here – indeed, lighting is felt to have an impact on crime.

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

Pollution, and especially if you're walking with children there's no gating so if - God forbid - there's an accident then you don't have a chance. There's nothing stopping the car coming onto where you and your children could be walking.

Pedestrian

At night a lot of people I know are wary about going through the tunnels and they brave the traffic instead.

Pedestrian



Equestrians would often prefer not to be near 'A' roads altogether

Their expectations for major 'A' roads are limited, but centre on predictability, comfort and safety

They simply want to pass through with as little delay or fuss as possible. Among those who ride a horse on paths near the 'A' road, this is usually on the way to somewhere else.

Comfort, as much as safety, is key here. Horses can spook easily and driver behaviours like tailgating, lane switching or over-use of the horn can lead to erratic behaviour. While some horses may be accustomed to the SRN, some are not, and a spooked horse makes for a potentially unsafe rider.

Small quality-of-life improvements to the network emerged as significant priorities:

- Additional bridges over busy stretches of the SRN for pedestrian, cyclist and equestrian use
- Pedestrian crossing buttons at rider height
- Higher railings on bridges in case of a bad fall
- Speed limit reductions near equestrian areas of the network

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

The bridges haven't got high sides, so if your horse spooks you could go over the side of the bridge. You don't feel safe.

Equestrian

Horse crossings would be great, horse lanes would be amazing... But fundamentally I don't know how you go about changing other drivers' attitudes, sadly.

Equestrian



Cyclists are highly aware of their vulnerability as road users

Safety is a crucial priority for cyclists

This emerges as a function of other road users' behaviour, but also of **road design**. Cyclists point to examples of being pushed into narrow spaces, junctions that are difficult to navigate, or areas that are poorly lit.

Likewise, **potholes** were seen as a safety issue, not a comfort issue: they can cause damage to both the bike and the rider.

Much like pedestrians and equestrians, cyclists feel as though they are an afterthought for those in charge.

However, cyclists do recognise that there have been improvements in both driver behaviour and road design. They still feel that more can be done, and much like equestrians, they argue that they need to be segregated from motorised traffic as far as possible.

'A' roads are off limits for cyclists – I mean, 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

No dedicated cycle path or way that you can see. Especially in Suffolk, it's not the best road quality; potholes don't combine well with bikes.

Cyclist



Disabled road users often highlight feeling overwhelmed on the road network

While many prioritise a 'comfortable' and 'smooth' journey, this takes on particular importance and manifests differently for disabled users.

Several drivers with health conditions need to be able to stop mid-journey:

- Those with **diabetes** may need to stop to take insulin.
- Those with **gastrointestinal diseases** may need to stop to use the facilities.
- Those with **mental health problems** are more likely to feel overwhelmed and being able to stop mid-journey is a valuable lifeline.

This construct of a 'comfortable' road journey therefore comprises many factors:

- **Driver behaviour:** Aggressive or inconsiderate driving is stressful and can exacerbate many health conditions
- **Frequency and quality of motorway service stations:** Being able to stop and 'regroup' is essential.

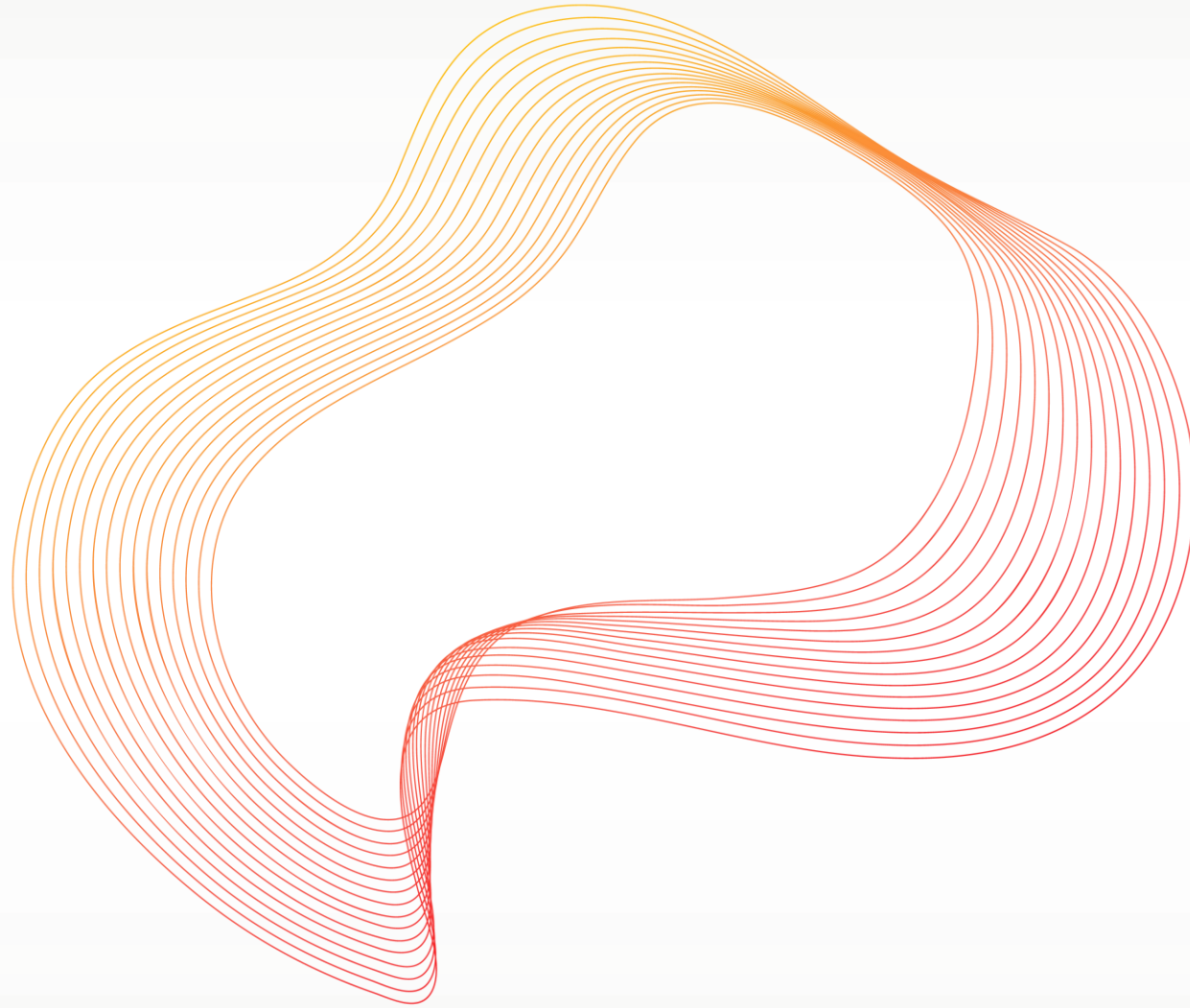
I suffer with anxiety and depression and when the roads get busy I do get panicky. Especially when it's dark and when it's rainy – it can be busy and there's not really good lighting where I drive.

Vulnerable driver

I have diabetes and I have to plan my journeys. I like to know when I can get back and I don't like taking insulin in the car – and I wouldn't feel safe on the motorway if I needed insulin.

Vulnerable driver





Lorry drivers' perspective

Lorry drivers' priorities are not markedly different to other SRN users, but there is a different emphasis

As with other drivers, congestion, roadworks (and therefore delay) are key priorities for lorry drivers

Reflecting this, they are more likely than other drivers to prioritise increasing capacity on the roads

- That said, lorry drivers are often fairly sanguine about the SRN
 - A certain amount of disruption is expected and accepted as 'part of the job.'
 - As experienced drivers, they have developed various mitigating strategies e.g. adapting routes, avoiding certain times of the day.
 - The SRN is seen as being almost always the best alternative; non-SRN roads present more problems in terms of potential delay and unpredictability.
- Perhaps unsurprisingly, lorry drivers are less concerned than others about how the roads are (or might in the future) be paid for
 - This is largely seen as 'someone else's' problem as regards goods vehicles (although as private drivers, their views chime with other users).
- Similarly, sustainability issues (while recognised as important in principle) are seen as outwith the individual driver's responsibility
 - As with other SRN users, lorry drivers anticipate the increasing use of electric vehicles.
 - But they also argue that road freight is a vital national service and that there are only limited opportunities for modal shifts.





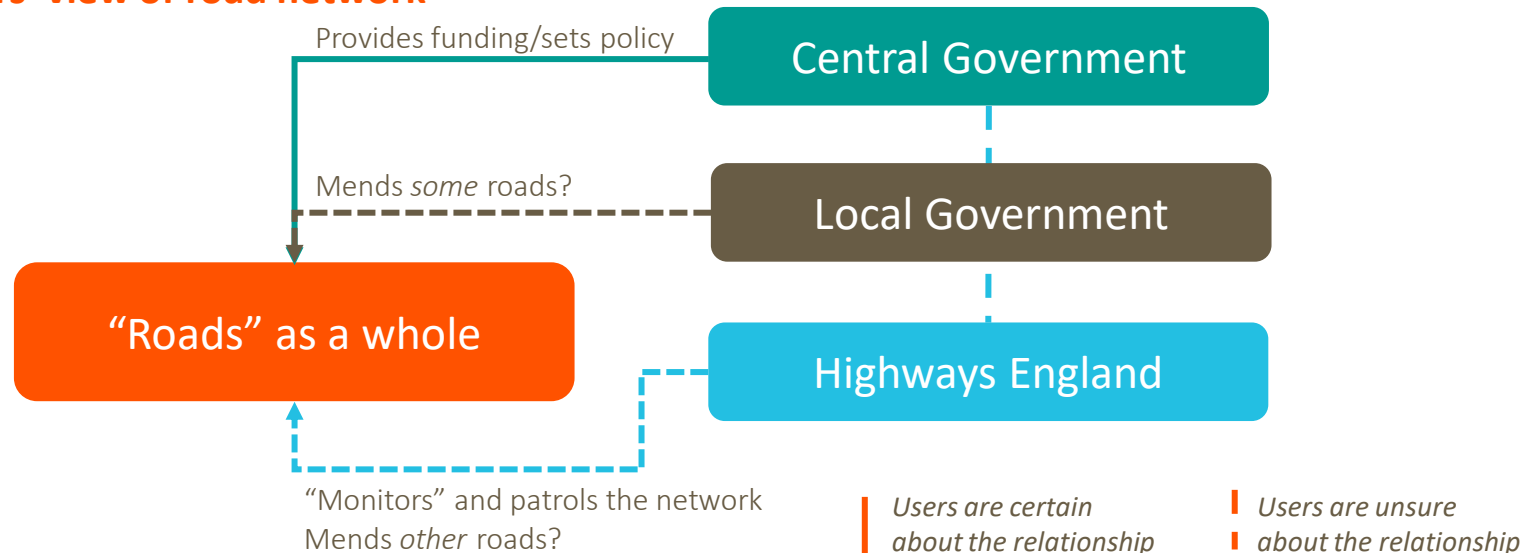
Users' understanding
of how the network is
managed

Users' understanding of how the road network operates is vague and patchy

Road users are often unclear about how motorways and major 'A' roads are managed as compared to local roads

- It is generally understood that local roads are looked after by Local Authorities and that Central government has a role in managing the major roads, but few have any precise understanding of how the network is run.
- This exacerbates the overall lack of clarity around how roadworks come about, and the rationale for them happening in the first place.
- There is a widespread (if inaccurate) assumption that Highways England has responsibility for enforcing a wide range of laws on the network.
- Where driver behaviour (and, for pedestrians, antisocial behaviour on pathways) is concerned, road users expect Highways England to tackle this, either through liaison with the police or by direct enforcement.
- Users also understand that Highways England monitors the network, but again, it is unclear what form this takes in their view. This monitoring is not read as 'management' of the roads in a concrete sense.
- Highways England is not understood to have a more strategic role – road users are not sure who sets policy and the overall 'plan' for the road network.

Users' view of road network



No, I don't know at all. I'm going to assume... Well, no I'm not even going to assume. I don't know.

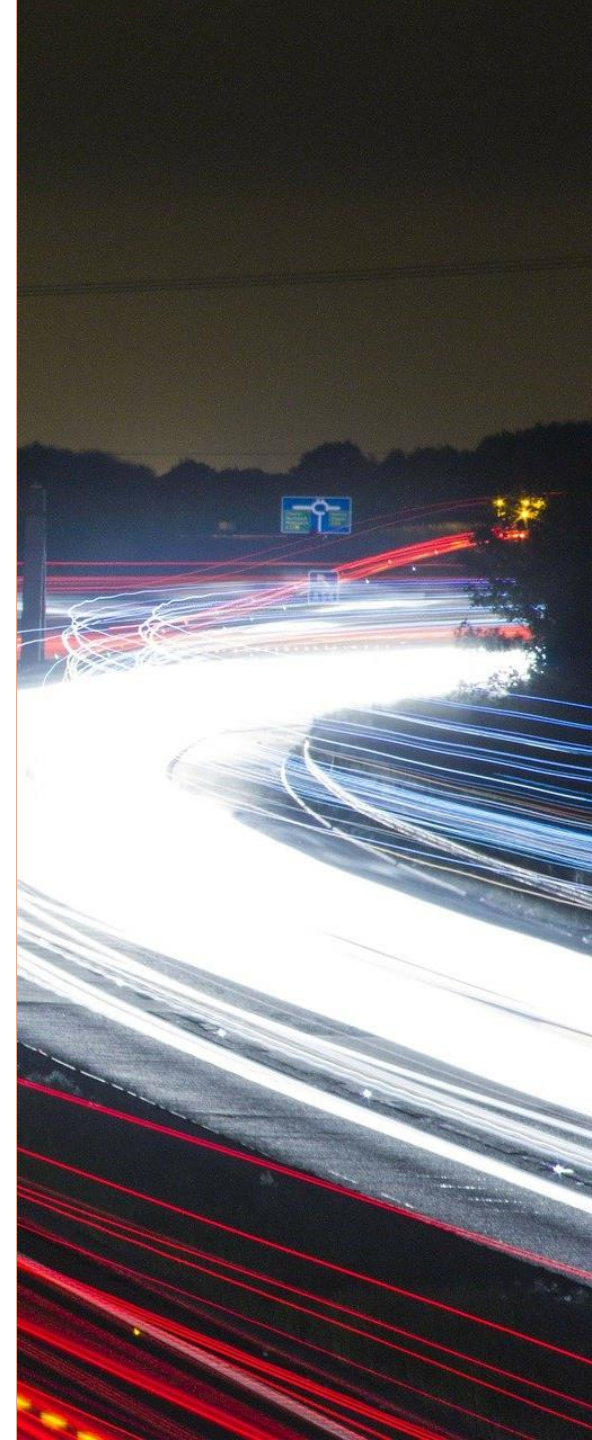
Vulnerable driver

Most drivers' experience of the road network is narrow and local

- Most road users drive at pre-set times of day and usually on just one stretch of the road network. Being asked to comment on the overall 'system' of the strategic road network is therefore something of a challenge.
 - Even those driving more extensively on the SRN do so without much active consideration.
- Drivers recognise that the major roads are a network *per se*, interconnected and differentiated from local roads, but do not recognise any overarching sense of control or planning.
- As a result they struggle to understand how change can be effected on the SRN and what, therefore, they are 'allowed' to prioritise.
- A handful of respondents assume that individual stretches of the SRN are managed by **local councils**, suggesting that they see the management of the network as piecemeal, rather than unified.

The thing with the road network is that it's so huge – and if it's not your patch, you don't know. It doesn't help me to know that they're helping things in Northampton or Liverpool. If it's not your road, you're not going to see it or even know about it.

Urban Pedestrian



When shown a list of potential priorities for improvement, road users generally feel the major issues were covered

- On seeing a full list of potential priorities, road users were often surprised to see that there were so many aspects of the network that **could be priorities for improvement**.
 - It had not occurred to many that improving data and phone connections on the network, for instance, was ‘controllable’ but on reflection, this is seen as an important part of navigating during the journey.
 - Similarly, some question the extent to which ‘driver behaviour’ can be managed.
- Road users would, by and large, **not add anything to this list**. That said, some feel that the focus is too much on inputs with less about the user experience e.g. ‘making my journey less stressful’ (although on reflection, this is usually seen as a function or outcome of the existing priorities).
- But while the list appears comprehensive in terms of day-to-day priorities, a few respondents **note the absence of higher order objectives**, such as reducing environmental impacts.

Improved quality of road surfaces	Better signage on the network
Safer design and upkeep of roads	Better protection of the wider environment
Better behaved drivers	Better maintained verges / roadside environment
Better management of roadworks	Better data and phone connections on the network
Better management of unplanned delays	Better facilities at roadside service areas / laybys
Reduced journey times	More provision of roadside journey services / laybys
Increased reliability / consistency of journey times	Better journey planning tools
Better information about unplanned delays	
Better lighting on the network	
Better notification about future planned works	

The funding of the roads appears to users just as unclear as its management

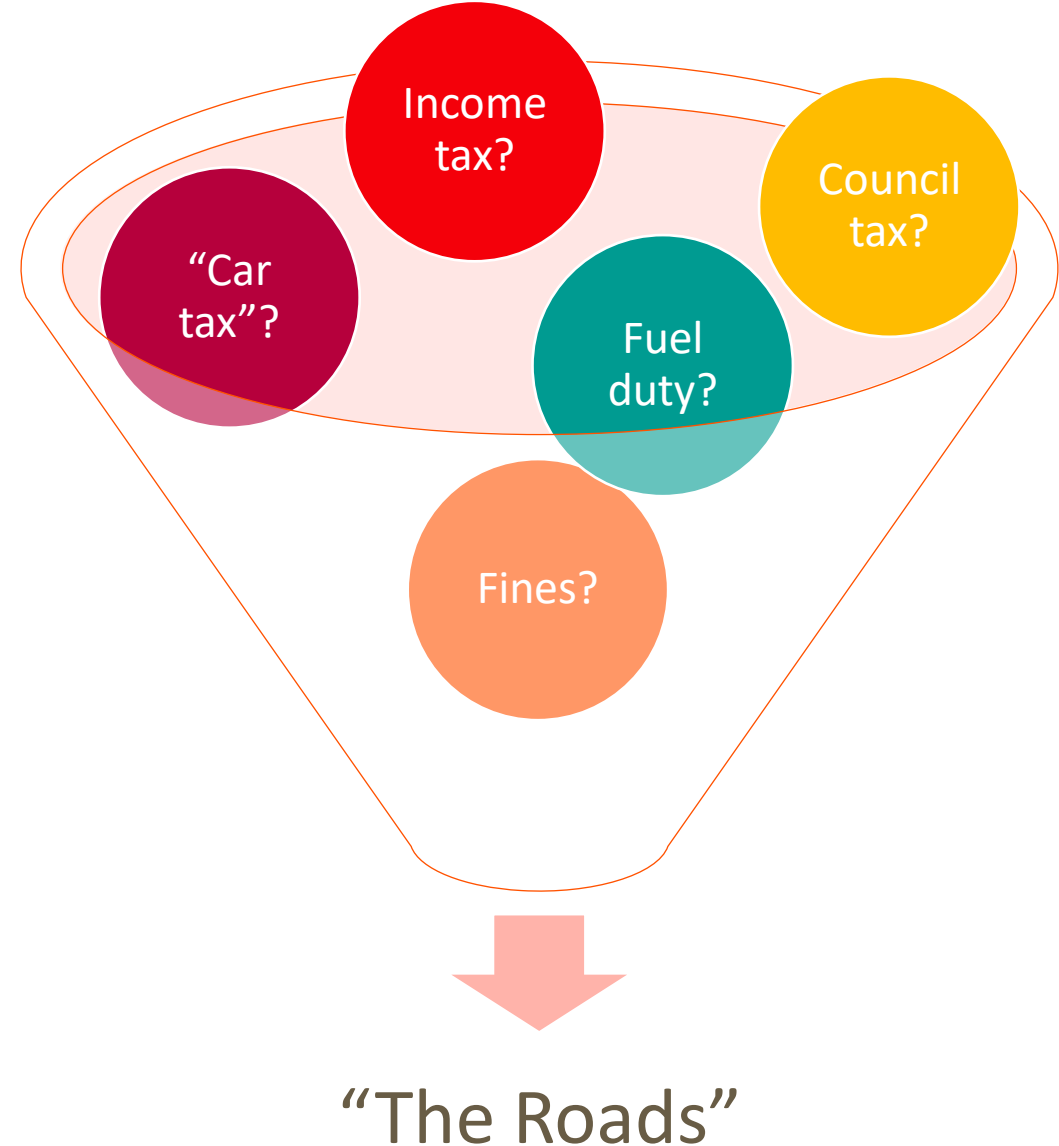
Notwithstanding the confusion around how the road network is funded, **there is no strong sense that the system is unfair or particularly onerous**. It is not the main cost of vehicle ownership in these respondents' minds.

However, the confusion is significant:

- Is the funding ringfenced?
- Do freight companies pay extra?
- Does general taxation contribute to upkeep or specific projects?
- What sources of funding pay the greatest proportion into the network?

Well there's your car tax, isn't there? That must be part of it. And then the councils – I think they must pay for some of it. Are speeding fines part of it?

South East, Leisure, Frequent



Most users assume that 'road tax' contributes to the SRN

This strikes virtually all respondents as a fair and reasonable approach.

- The guiding principle for evaluating road network funding is 'Is it fair?' Road users want to see road users charged in proportion to their usage of, and the benefits they derive from, the SRN.
- In this way, Vehicle Excise Duty can strike some infrequent road users as unfair. They use their vehicle on a contingency basis and do not see why they should pay into the network on equal terms with more frequent users, even if they are spending less on fuel.
- However, most recognise that they have some influence over how much road tax they pay – opting for a more fuel-efficient vehicle feels reasonable and achievable.
- Virtually none suggested that cyclists, pedestrians and equestrians should have to 'pay into' the network. They argue that having to use paths or byways astride the SRN is far from ideal, and there was no suggestion that cyclists, pedestrians or equestrians should 'pay for the privilege' of using them.
- Fuel duty strikes respondents as reasonable. Nobody likes paying it but it emerges as a fair 'pay as you go' approach where the more you use the more you pay. However, those who feel they have no choice but use their car or have to drive further to get to other places because of where they live can feel penalised.

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.

Urban Pedestrian

More fundamentally, road users do not get the sense of there being a dedicated 'pot' of money for the SRN as a whole. The perceived lack of a system can undermine what road users see as 'achievable' for the future.

The current system of funding the road network is mostly considered fair

Road users were shown the explanation of how the road network is currently funded, to help contextualise their perspectives and ensure that they were deliberating on their priorities with the fullest knowledge possible.

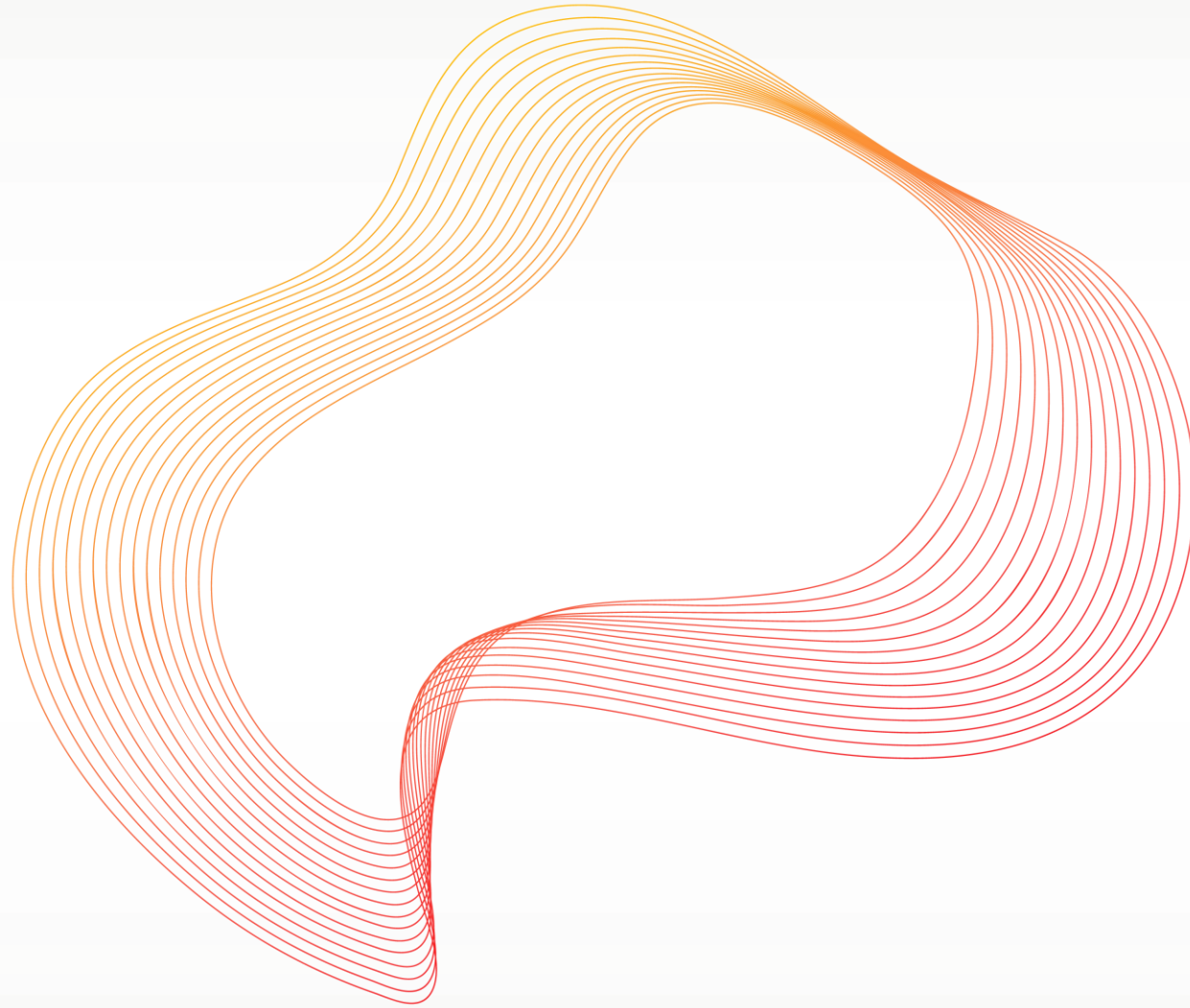
Road users are highly supportive of the concept of 'ringfencing' funds that are derived from road users for the upkeep of the road network. Some, however, are surprised to see that fines and other more ad hoc sources of income are not included in the breakdown of how the road network is funded.

I feel like it's fair. The road users have an impact on the environment and I get that because we're focussing on roadworks, global warming and stuff like that, that they have to sort of rectify it, to make sure they're not having an impact. Cut down a tree and plant three more, kind of thing.

Vulnerable driver

The motorways and major 'A' roads in England are paid for by central government using the money from car tax (vehicle excise duty) that is paid in England.

Other roads are paid for by local councils – usually a County Council, or 'unitary authority' or a London Borough – using Council Tax, car parking revenue etc., but also with funding from central government for larger improvement projects.



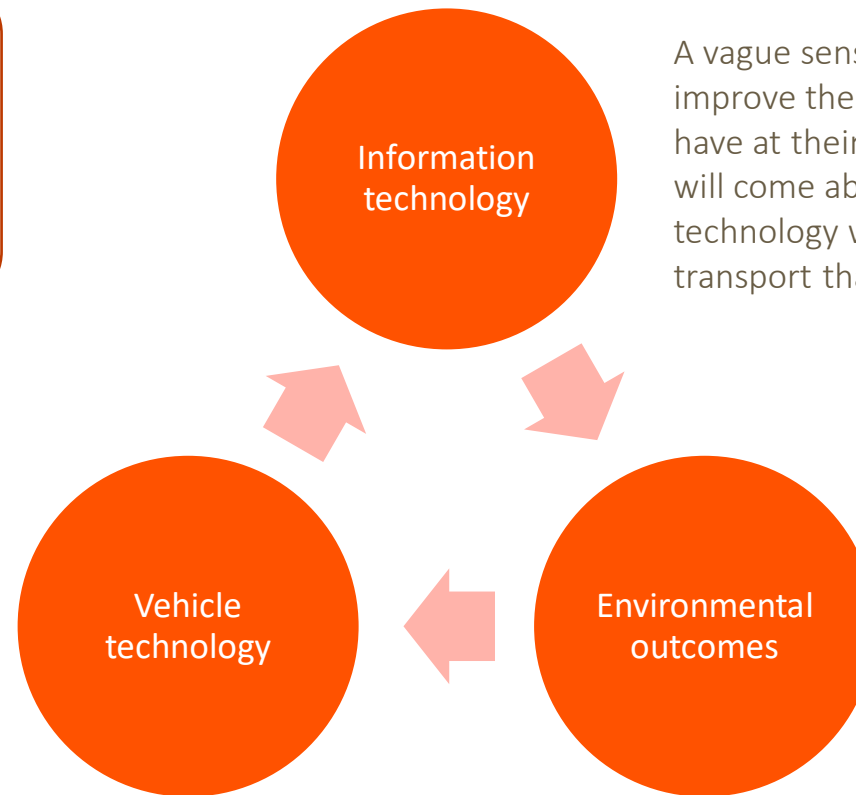
The future of how the
road network is
managed

When discussed in detail, respondents land on three key themes about what the road network will need to account for in the future

But it's got to be safety as well, and electric vehicles... We're all being encouraged to do it but if it can only go 200, 250 miles, how is that going to get me where I need to be down in Cornwall?

South West, Leisure, Infrequent

A strong assumption that vehicle technology will improve over time and likely become more environmentally friendly. It is not felt that this will significantly impact the core problem of congestion, and significant concerns persist around the price of such features.



A vague sense that technology will inevitably improve the quality of information road users have at their disposal. Users are unsure how this will come about, but there is a fear that this technology will be applied more to public transport than their own vehicles.

Strong recognition of the overall social imperative to reduce carbon emissions to tackle climate change. This is almost always understood to be best solved through modal shifts towards public transport.

Awareness of electric vehicles, and their implications for the road network, was high

Road users understand that things will need to change with the proliferation of electric vehicles. Both in terms of infrastructure requirements and how the road network is funded, road users want to see the network 'prepared' for the change.

They also understand that road tax is based on the amount of fuel consumed by the user's vehicle. Again, our respondents were largely in favour of the status quo whereby road users fund the network. This leads them to consider a few different possibilities for how the SRN could be funded in the future:

Tax by mileage?

An 'electricity tax'?

Vehicle ownership tax?

Road users value the current concept of drivers 'paying for their impact' on the network. Many point out that electricity is not carbon neutral to produce, and electric vehicles will still wear out the road surface. They envisage a solution where **funds are drawn from electricity consumption** rather than engine capacity. Though again, few can predict who will actually 'own' the charging stations and who would derive the income.

The expectation is simply that the rollout of electric vehicles will not make their journeys worse, even if it's unclear what changes this would require. Respondents do expect vehicle charging points to be frequent along the SRN, however.



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Road users expect the SRN to be more technologically advanced by 2030

Users do not necessarily mind how this is achieved

Virtually all our respondents were well-accustomed to the use of technology while they drive – use of Waze and Google Maps was common, and they are not looking for a substitute in terms of how the data is delivered to them. (Although they do value the underlying data coming from a reliable source, such as Highways England).

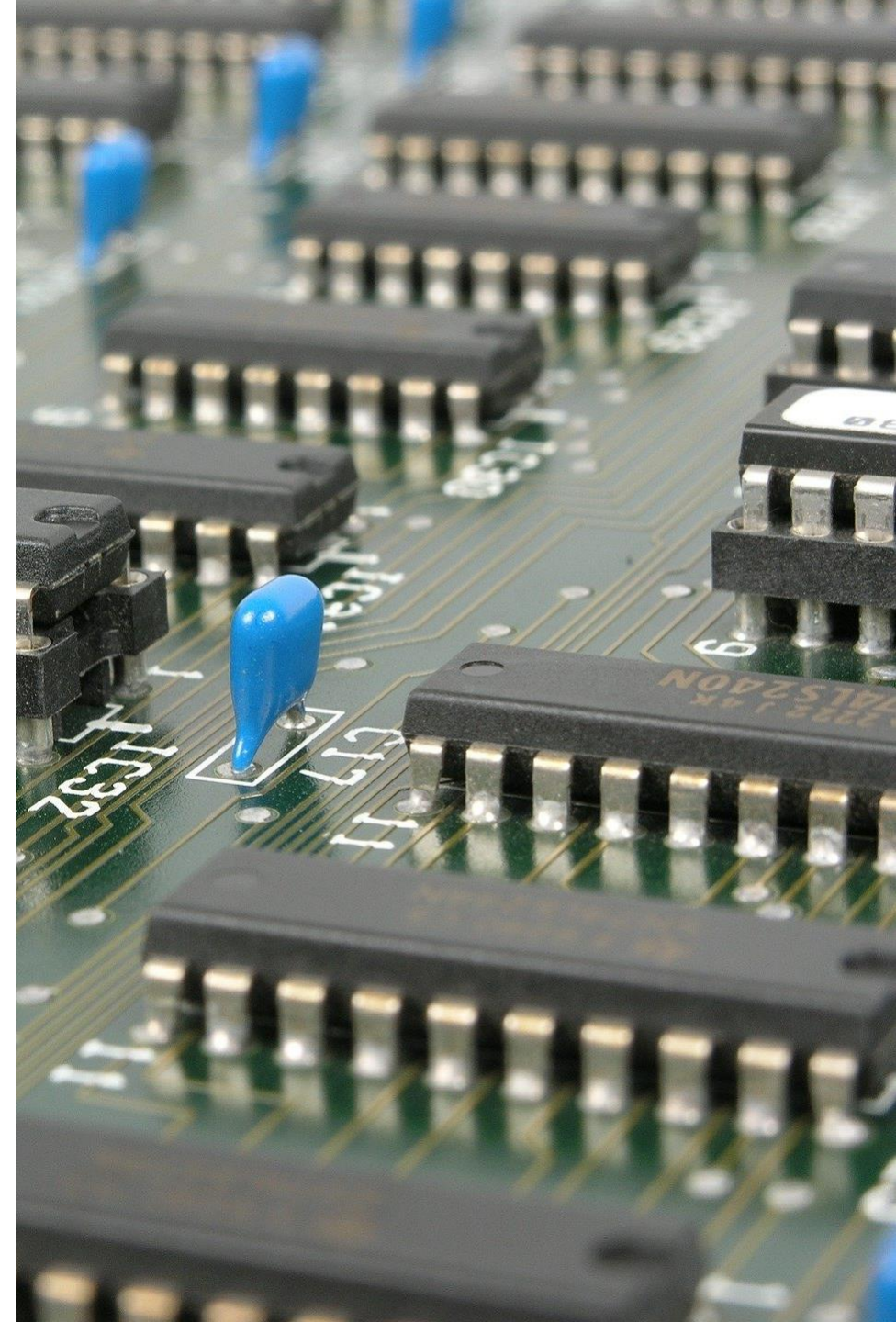
It should be noted that at this stage of the discussion, Highways England was still relatively unknown to these respondents. The idea of Highways England providing a way for drivers to plan their journeys was not appealing *per se*.

- *At worst, the unfamiliarity of Highways England can lead some to highlight concerns around privacy. Misconceptions around Highways England's role prompt fears around 'surveillance' of drivers in a punitive sense.*
- *That said, the principle of using increased connectivity and data sharing to improve journey planning and the journey experience is broadly supported.*

The concept of more data-driven management of the road network generates mixed reactions

Again, the concept is hampered by trust. Confidence in the ability of those in charge to plan and execute road maintenance or other interventions effectively is low.

Pre-emptive detection of necessary interventions does not necessarily promise that those interventions will be executed properly, in their view. Indeed, some wonder why Highways England *doesn't already* have the data needed to minimise disruption.



Creating greater integration with public transport hubs was seen as a major goal for the road network for the future

Respondents are reasonable here – modal choice (and a road network that accommodates it) is seen as a public policy issue as much as a ‘Highways England’ issue

- Respondents accept intellectually that there needs to be a modal shift but the sticking point is around perceived or real lack of **feasible and affordable alternatives**.
- The underlying concern is that there is **simply too much traffic on the roads**.
- Users expect the decline in rail and bus use due to COVID to persist long past the pandemic and fear a **‘vicious cycle’** of demand, and roadworks to meet that demand, continuing indefinitely.
 - **Encouraging more people to use public transport feels like the only feasible way to break this cycle.** Road users do, to some extent, hope that Highways England will co-ordinate with transport providers across all other modes to ensure that transport users have genuine choice and modal diversity.
 - To some extent, road users hope that the network will be more focussed on those who have no choice but to use the SRN – there is a widespread assumption that the network cannot and should not be prioritised towards those who ‘opt in’ to drive.

Most respondents saw themselves as unable to use public transport. There is perhaps some expectation that ‘someone else’ will make a modal change, rather than the individual.

I wish they were like in France or Germany – more space, but not more traffic. Even if we had more lanes on the M25, say, it would just be another lane to have a jam on. In Europe it’s just more open.

South East, Leisure, Frequent

Well if they keep upgrading the roads then they’ll have to close them off, so how is that going to be managed and how will it affect people?

Lorry Drivers Group

Road users do not object to the current funding model but recognise that different patterns of road use may necessitate change

Alternative funding models are polarizing, with significant pros and cons

	For	Against	
Toll roads	Valuable if a superior option than a 'free' alternative road	Unfair when it's the only available option.	<i>If it were a toll road I'd avoid that road, and that would just cause problems for some other road. You don't want the general traffic to be avoiding them.</i> South West, Leisure, Infrequent
Congestion charges	Reasonable when genuine modal choice exists beyond roads.	Unfair if there is no alternative but the road network.	<i>I've got family that live in London and it does reduce congestion. It's charging those that need to do it, so it could be unfair, but it makes people think of alternatives.</i> Yorkshire and North East, Business, Frequent
Vehicle ownership tax	Familiar and fair, a case of 'paying for what you use' of the network.	Unreasonable if the tax is regressive or flat.	<i>But I work at Heathrow and it's a long drive – does that mean I'd be penalised for just going to work?</i> South East, Leisure, Infrequent
Road charging	A "pay per use" model where the more you use the more you pay, likely to be well-enabled by new tech	Potential fears around surveillance from technology used to enable this. Possibly punitive for those who 'have' to use the roads more than others	<i>It would be an infringement on people's privacy, the children I work with, let alone my own.</i> Vulnerable driver



Road users' expectations for the future

Over the course of the research, respondents' level of knowledge grew and their perspectives became more informed

Lower Knowledge

Pre-task: Individual Needs

At this stage, the emphasis was on individual priorities – an opportunity to let out frustrations with their experiences on the roads rather than the overall structure or management of the road network.

The roadworks were fine...I didn't waste as much time as I thought I would.

Pre-task exercise

Focus groups: Collective Needs

In a group setting, respondents reflected on other people's needs, including cyclists, pedestrians and equestrians, those on low incomes or with difficult, non-discretionary journeys. At this stage, the stressfulness of road travel emerged, as did the need for a smooth and comfortable journey.

The network needs to be made safer for children and the elderly – anyone vulnerable. It needs to be made safer for everybody to use.

Urban Pedestrian

Higher Knowledge

Deliberation: Transparency

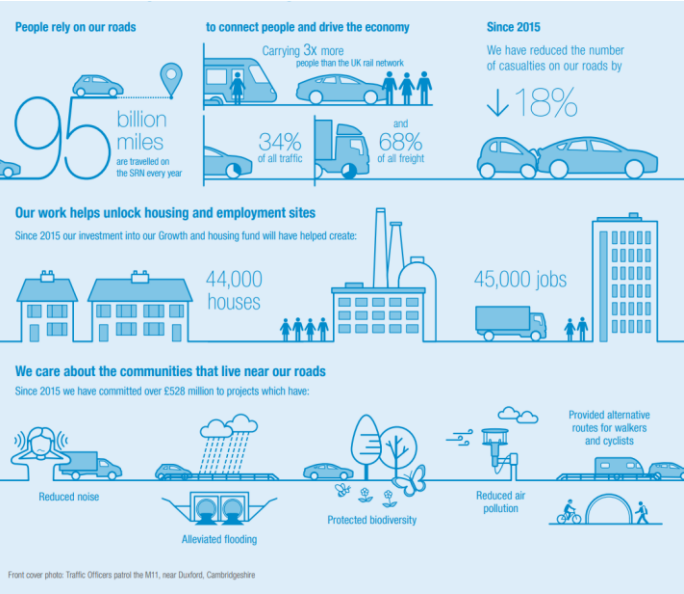
On being told about the range of activities Highways England undertakes, and seeing the apparent ambiguity behind some of the RIS2 priorities, many argue that they need to hear more from Highways England about what they are doing and why.

If Highways England had a list of projects or whenever you pay your car tax it says 'Oh thank you, we're doing this and that to improve your journeys...' – I don't know how you'd find out about all of this.

South East, Leisure, Frequent

What did we show road users?

A 'potted summary' of what Highways England does, the extent of its activity and the variety of its impact on the road network. This provided valuable context and informed road users of the scale of what they are deliberating on.



A summary of how the second Road Period budget is being allocated to understand, in broad terms, whether the budget matches road user priorities in the present.



A summary of RIS2. What do respondents feel is missing from the strategy and what lessons could Highways England learn for RIS3?



Road users are often surprised at the scale and scope of Highways England's activities

Few had considered the impact of Highways England's activities on housing, jobs and local communities

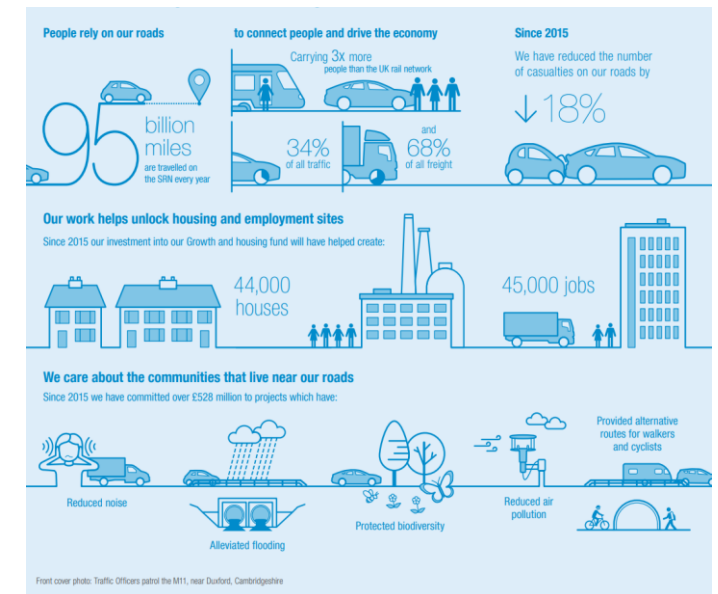
Cyclists, pedestrians and equestrians were pleased to see that Highways England is working to mitigate the level of noise on the network, although pedestrians in particular were sceptical about the provision of alternative routes. It's not enough that the routes exist, in their view – they have to be safe, well-lit and ideally well-clear of the SRN altogether.

The 18% decrease in casualties since 2015 statistic was something of a revelation

Road users had previously assumed that safety was uncontrollable and effectively a matter of driver compliance and luck. The effect of seeing that there has been a decrease revealed that, in essence, road users can 'ask for' more ambitious priorities than they had previously assumed.

This stage of the discussion revealed that Highways England could do more to reveal its importance and role to road users. Only when made properly aware of the organisation's impact and ability to effect change do fully informed perspectives on priorities for improvement emerge.

Some road users say it explicitly: Highways England needs to prioritise being more transparent and open about what they do and why.



Many road users feel that maintenance should be prioritised over enhancement

Road users can feel exasperated at what feels like 'endless' building and re-building of the motorway

- A common refrain among these respondents was that the road network should maintain what it already has, rather than feeding the cycle of '**catching up with**' increasing road demand.
- The longer-term objective must be fewer vehicles on the road – anything else can feel regressive, particularly with regards to the **environmental outcomes** road users highlight.
- This stage of the discussion reveals that many road users want to see the **execution** of road maintenance and renewal improved. Whether this is through more technologically-advanced materials, or greater planning, the hope is that newly-maintained or renewed roads should not need revisiting for a long time.
- Transport users do want a more information-rich road network but struggle to imagine what a 'digital future' means in this context.
- Again, cyclists, pedestrians and equestrians can feel side-lined when shown the 3.4% figure for **Designated Funds**. They do not see their own priorities in the other funding streams and would welcome a more concerted focus on their needs.



Where the 2020-25 plan was felt to maintain existing progress, road users want to see the 2025-30 plan make concrete leaps forward

Some of the goals can appear to lack ambition. For instance, those limited to only the first year or two of Road Period 2 or which seek only to maintain an existing benchmark rather than exceed it.



“Average delay per mile to be no worse”

Road users expect incremental improvements plan-by-plan – the ambition for delays per mile to be ‘no worse’ feels like something of a compromise and stands against the key priority of road users for their journeys to be smooth and predictable.



“50% reduction in people killed or seriously injured”

Well liked, once respondents are aware that Highways England have already made significant progress in this area since 2015. It feels achievable, and safety is a major, if latent, priority. Some point out that this may be a function of car design rather than Highways England activity.



Environmental goals in general

Again, environmental outcomes feel beyond Highways England’s remit. This is a question of encouraging modal shift and electrification. Beyond readying the network’s infrastructure for an electric future and enabling access to public transport, expectations are low.



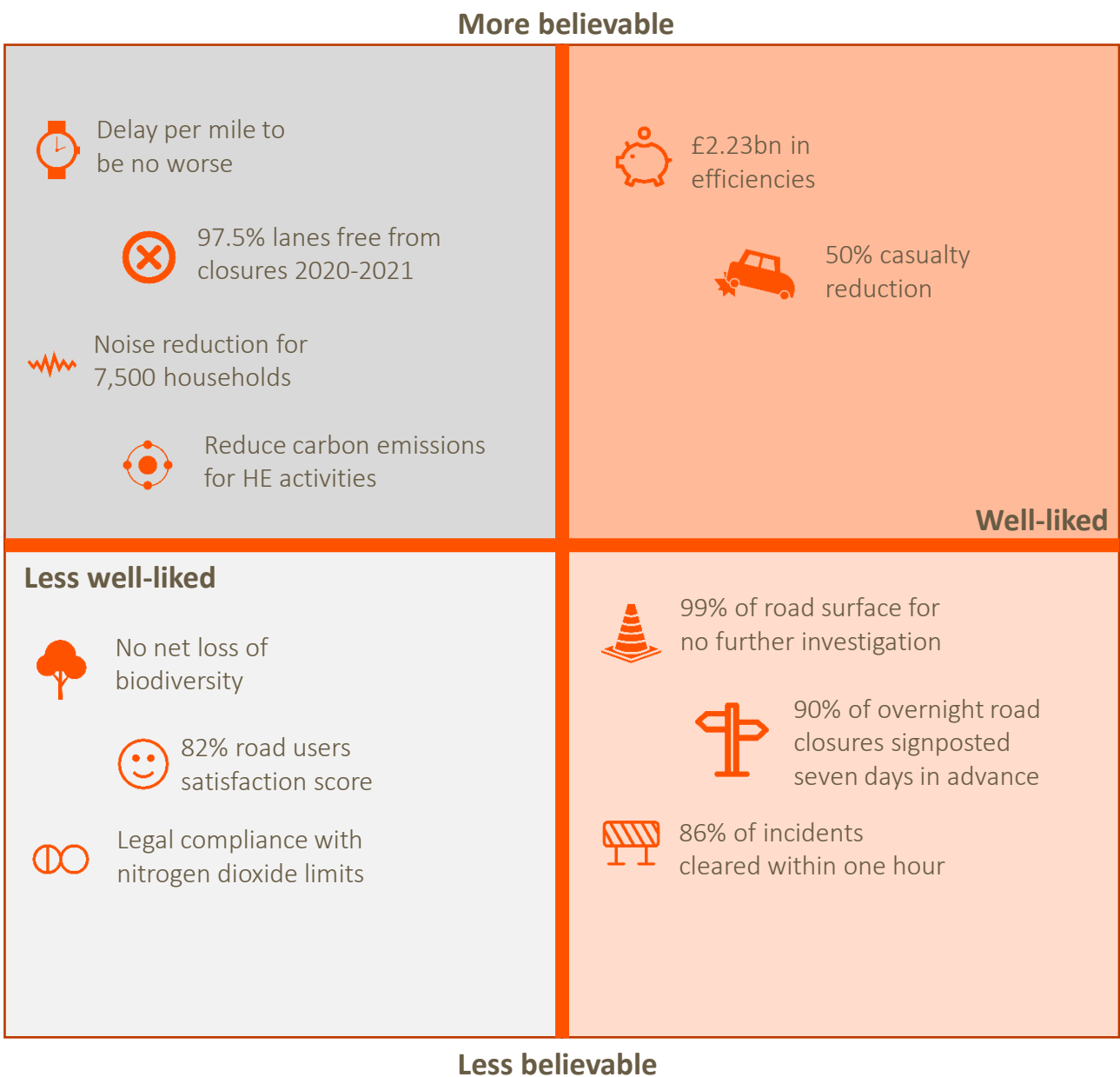
“£2.23bn in efficiencies”

Unambiguously positive, though road users want to know what happens to the money. Will it be reinvested into RIS3, or lead to a reduction in charges or taxes?

While many priorities were recognised as important, not all of them felt achievable

These priorities for RIS2 are usually read as *not ambitious enough*, rather than not worth pursuing. **RIS3 should heavily prioritise improvements on these metrics.**

Only when made properly aware of Highways England’s impact and ability to effect change do fully informed perspectives on priorities for improvement emerge



These priorities for RIS2 can largely be carried forward ‘as is’ into RIS3. **Highways England can continue their momentum in this area** and do not need to be altered heavily by 2030.

Road users want some reassurance that Highways England will be held to account for delivering against these priorities. To gain trust, Highways England needs to **demonstrate that they have met these priorities in RIS2** and either maintain or improve on these goals in RIS3.



Summary and conclusions

Road users' hopes for the next year centre on quality of life issues, rather than broader, strategic goals

- When asked, most simply want to see congestion eased and delays due to roadworks reduced.
 - **However, this needs to be understood in context.** Road users have a limited appreciation for how the road is funded or managed. Their goals are transactional and straightforward and usually ignore the broader issue of what *can* be affected by Highways England – most simply do not know.
 - **As a result, priorities are usually limited and localised.** They do not have priorities for the SRN as a whole so much as for their journey in particular.
- **Broadly, this research validates previous research conducted by Transport Focus.** In terms of what drivers experience day-to-day on the roads, questionnaires like the SRUS cover off the most salient issues that affect drivers in the here-and-now.
- **But, road users do understand that there are changes on the horizon,** in terms of environmental goals, changes in information technology and vehicle technology. Road users do expect Highways England to account for these trends, which they see as inevitable.

Next 12 months

- Solve the most **salient issues** facing my journey:
- Delays, roadworks, driver behaviour

Next ten years



RIS3 should balance the day-to-day priorities of road users with their longer-term hopes

- The high-salience issues of potholes, lighting and delays due to roadworks are unlikely to go away, and indeed, many road users recognise that COVID-19 could increase congestion and exacerbate these issues. The third road investment strategy is expected to account for this.
 - However, our respondents also expect a more strategic view. They may not be able to predict the impact of these changes to the transport system, but they expect Highways England to be ready. Enabling the SRN for electric vehicles in terms of infrastructure will be crucial. Likewise, many expect a reduction in demand for the road network, rather than just an increase in capacity.
- Ultimately, road users are waiting to be shown that someone is in charge. Road users can be told that roadworks, infrastructural projects and other interventions are non-random and that there is an underlying strategy. This can also help road users understand (and plan around) maintenance.
 - There is an opportunity here for Highways England to help road users understand the rationale behind the management of the roads. Many left our group sessions surprised at the breadth of Highways England activities and felt that they were hiding their light under a bushel.

Next 12
months

Next ten
years

- Solve the most important issues facing my journey:
- Safe, comfortable and reliable road use



Existing day-to-day journey priorities will continue to be valid, but newer issues will also need to be acknowledged

The SRUS successfully measures road users' priorities on a per-journey basis

- Seeing the SRUS questionnaire was a positive experience. Respondents were pleased to see that quality of information, impact of roadworks, congestion and journey time can be measured and, by implication, changed. The overall constructs were felt to be valid and reflective of what they saw as **important in terms of their day-to-day experience**.
- Beyond this, a number of **newer issues emerged as potential priorities**: support/ infrastructure **for electric vehicles**, 'digitising' the SRN (if this can be easily explained) and the SRN's contribution to sustainability were most significant. While it may be too early for some drivers to have a firm view on these topics, establishing a base line measure of their priority could be nonetheless valuable.

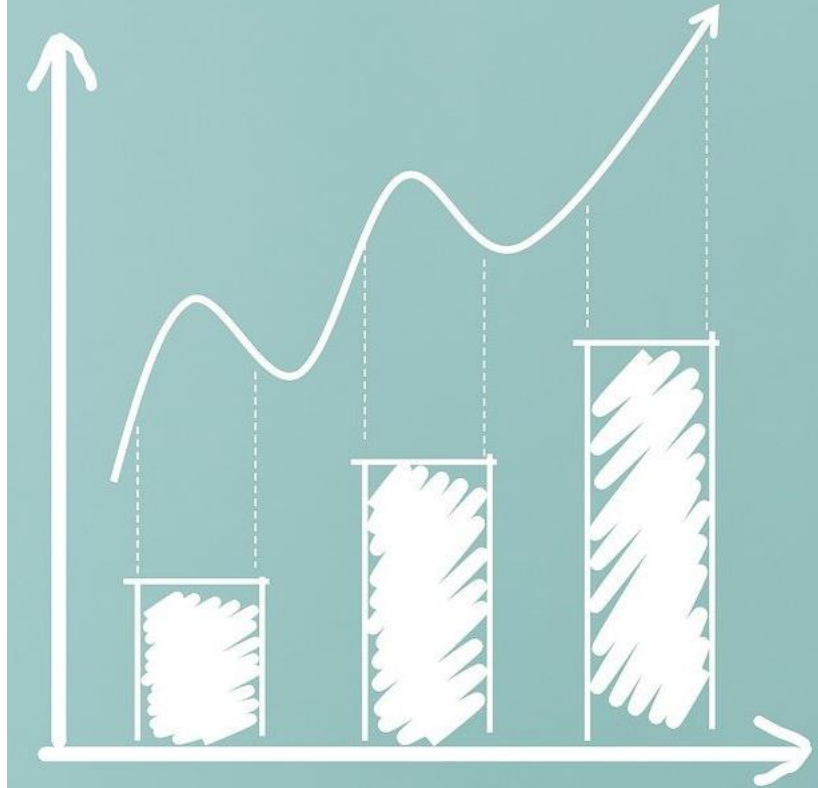
However, our road users also had priorities that emerged as their understanding of how the network is managed developed

- **More deliberative questioning** about what Highways England could improve upon would be valuable, particularly around the overall management of roadworks, transparency and the quality of information they receive.
- However, this might require **awareness-raising** around who Highways England are, and what they do before road users feel able to comment.

Road users recognised that some potential priorities, such encouraging modal shift as part of the sustainability agenda, operate at the wider societal/ public policy level

- These may be difficult to reduce to simple survey metrics. However, the utility of the road-specific elements of such policies e.g. improving/ providing more park & ride facilities could be established.

Given the complexity and inter-relatedness of many of these issues, some form of prioritisation or trade off technique is likely to be required





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Road users' priorities for improvement

Prepared for Transport Focus

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