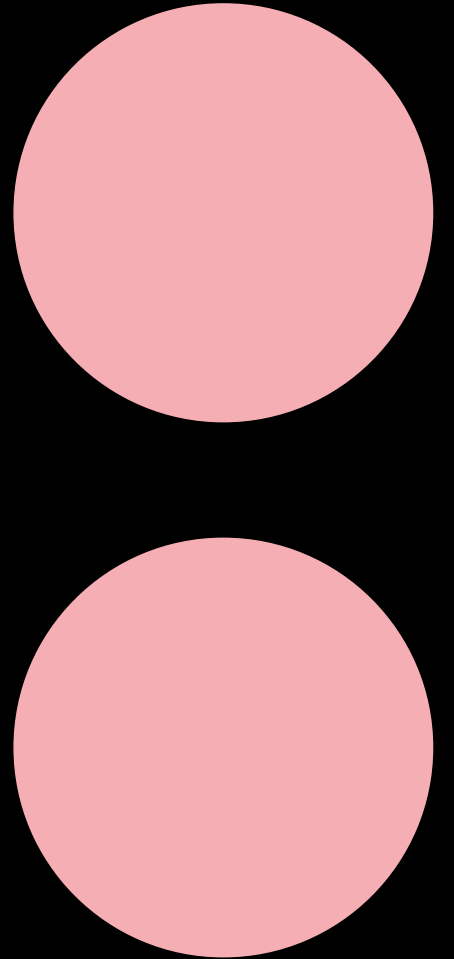

Transport Focus

Drivers' priorities for improvement
to England's motorways and major
'A' roads

August 2021



Background

Transport Focus wanted to update its knowledge of priorities for improvement among those using England's motorways and major 'A' roads, the Strategic Road Network (SRN) managed by Highways England on behalf of the Government. This was required so Transport Focus can represent the interests of road users in forthcoming discussions about development of the Government's third Road Investment Strategy (RIS3) covering 2025-30.

This quantitative phase of the research follows on from a qualitative phase.

Although not identical, the quantitative phase was similar in nature to priorities for improvement work conducted by Transport Focus in 2015. The 2021 research needed to take into account Covid-19 in its design and delivery. It was all conducted online and asked about typical journeys rather than necessarily the last journey.

Objectives

To understand the **priorities for improvement among users of the SRN**

To examine these findings by **looking at:**

Type of vehicle used (car, van, motorcycle, HGV etc)

Journey type (commuting/ business/ leisure use)

Journeys within each Highways England region.

To provide additional trade-off analysis on the **importance of maintaining the roads that currently exist vs significant new build projects.**

Additional to these core objectives the research also looked at:

Perceptions around electric vehicles

Attitudes towards road surfaces

Ways of reducing journey times

Use of the SRN by cyclists, pedestrians and equestrians

Main causes of stress on the SRN

Sources of funding for the SRN

Perceptions of Highways England

Methodology (i)

The survey was conducted online from the **10th – 26th March 2021**.

All respondents had driven/ ridden a motorised vehicle on the SRN in the past 12 months or did so prior to Covid-19 restrictions being introduced in March 2020.

Boosts were applied to the data to ensure the following targets were achieved:

Car/ van drivers	target = 4,650	achieved = 4,828
Motorcycle/ moped riders	target = 350	achieved = 407
HGV/ LGV drivers	target = 250	achieved = 249
Coach/ bus drivers	target = 100	achieved = 134
Plug in electric car/ van drivers	target = 100	achieved = 203*

Methodology (ii)

Anyone who said they ever drive a coach or 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 and 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 tend to be main drivers of other vehicles, as such, during the fieldwork period the approach to these users was changed such that all motorcyclists were asked about journeys on the SRN when riding these.

Where users drove multiple vehicles, they were allocated based on coach or bus first, HGV/ LGV second and motorbike third

Methodology (iii)

Due to Covid-19 restrictions impacting current behaviours, participants were asked to answer questions thinking about their 'typical' journey, either in the last 6 months or pre-March 2020. The definition of which they were asked about was derived from the current (and expected future) behaviours.

Participants who had used the SRN pre-March 2020, had not used in the last 6 months but expected to use in the future were all asked about their typical journey pre-March 2020.

Participants who had not used the SRN pre-March 2020 but had used in the last 6 months were all asked about their typical journeys in the past 6 months.

Participants who had used the SRN pre-March 2020 and in the last 6 months:

- were asked about their typical journey pre-March 2020 if they expected their future usage to be more like it was pre-March 2020
- were asked about their typical journey in the past 6 months if there was no change in their usage compared to pre-March 2020 or if they expected their future usage to be more like it had been over the past six months than it was pre-March 2020.

Weighting the survey data

Weighting was conducted only to car and van drivers' data.

This data was weighted to match SRN user profile data supplied by Transport Focus (the same as used in 2015) on age, gender and region, as follows:

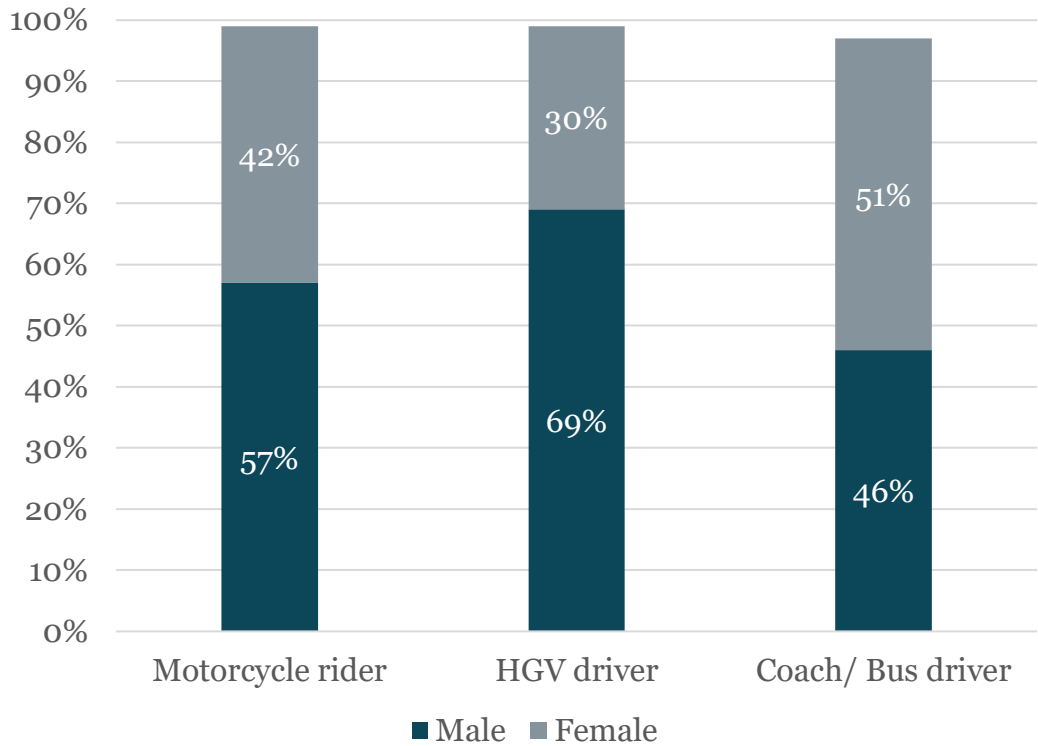
Age	%	Gender	%	Region	%
16-24	7%	Male	56%	North East & Yorkshire	14%
25-44	34%	Female	44%	North West	16%
45-64	36%			Midlands	20%
65+	24%			East	13%
				M25	7%
				South East	18%
				South West	12%

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

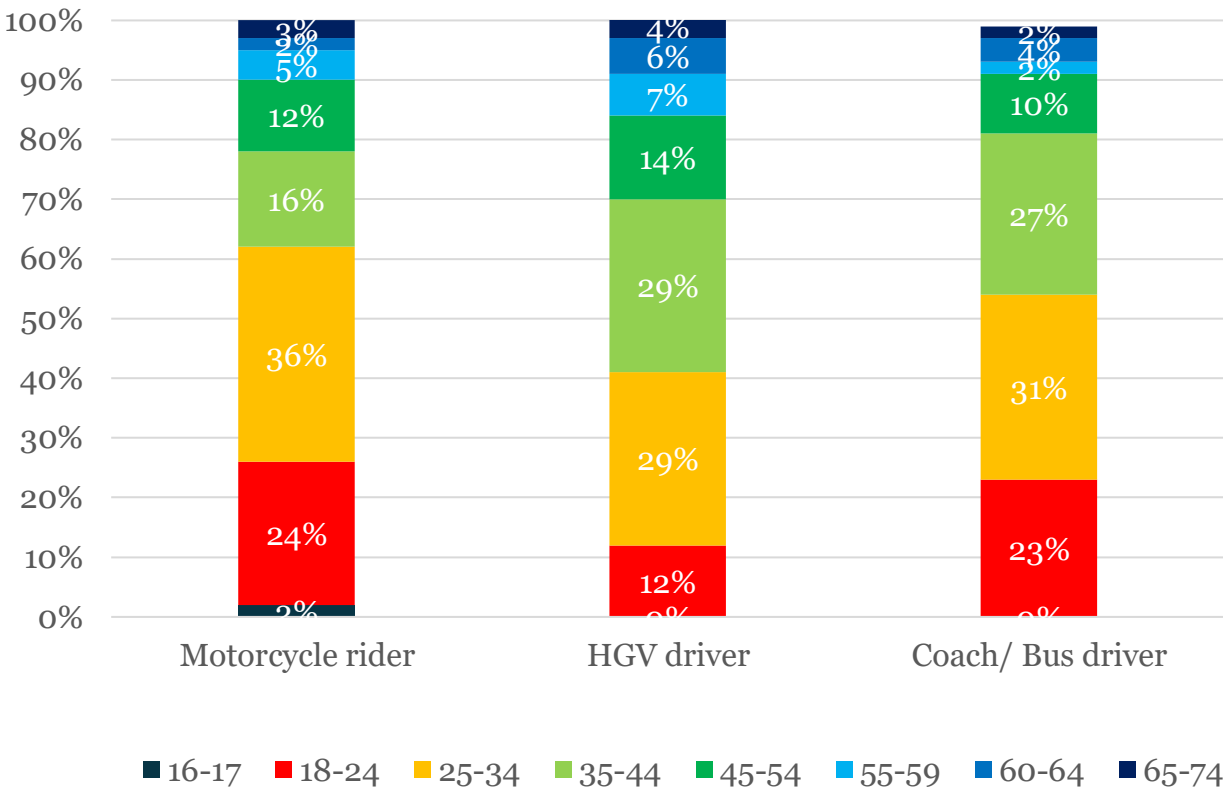
M25 usage within the data was higher than expected. For weighting and reporting purposes only those who said they only travelled on the M25 (or M25 spur roads) and not on other roads outside this were included in the M25 data. Those who drove in the East or South East **and** M25 were included in the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

A range of ages and genders were picked up across the other user types – this data was not weighted

Gender



Age



Typical journey length and journey purpose

Historically data for Transport Focus SRN studies has been based on the last journey made.

For this survey it was felt, given the abnormal travel patterns due to Covid-19 restrictions, that this was not possible and, therefore, data was based on a typical journey that included using the SRN. Using this method may have contributed to some differences in the data.

In particular, whilst previous studies have shown an almost even split of users making journeys of under 10 miles and those of more than 10 miles, this pattern was not seen in this year's study.

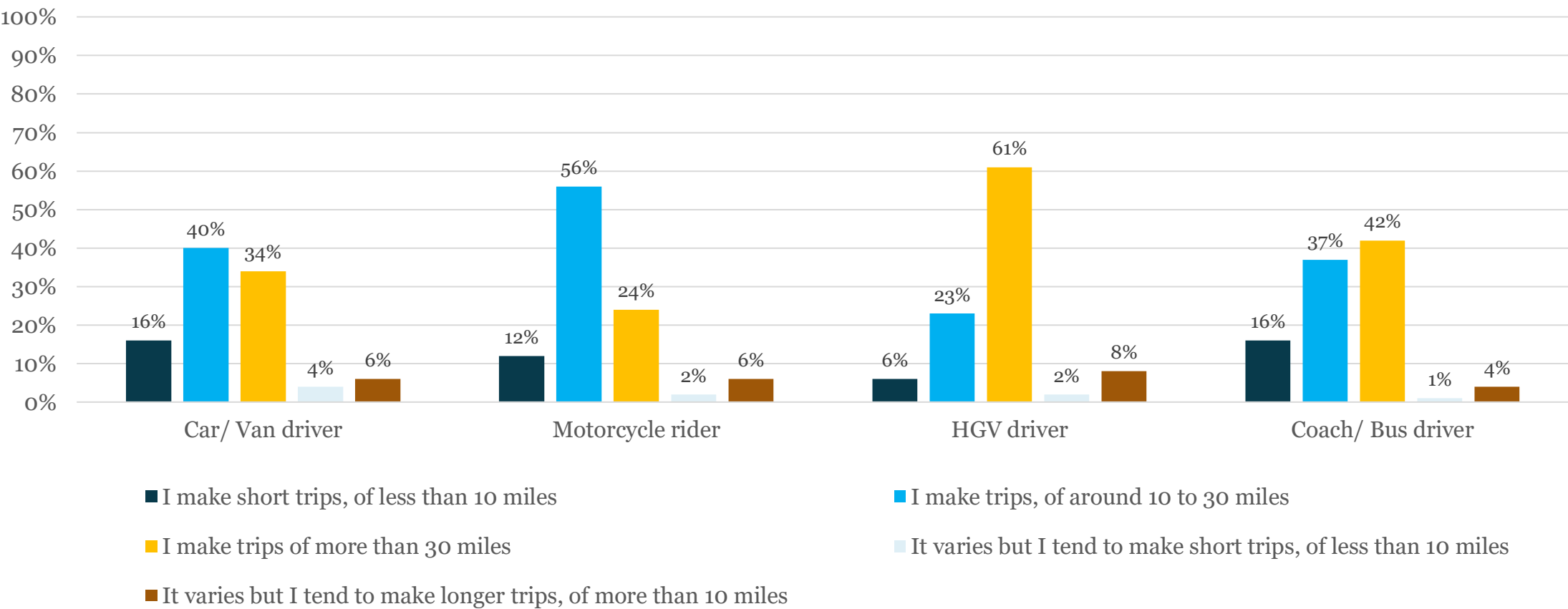
2021 data = under 10 miles: 20%; Over 10 miles 80% (of which 10-30 miles = 40%)

As such, data has been examined by 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.

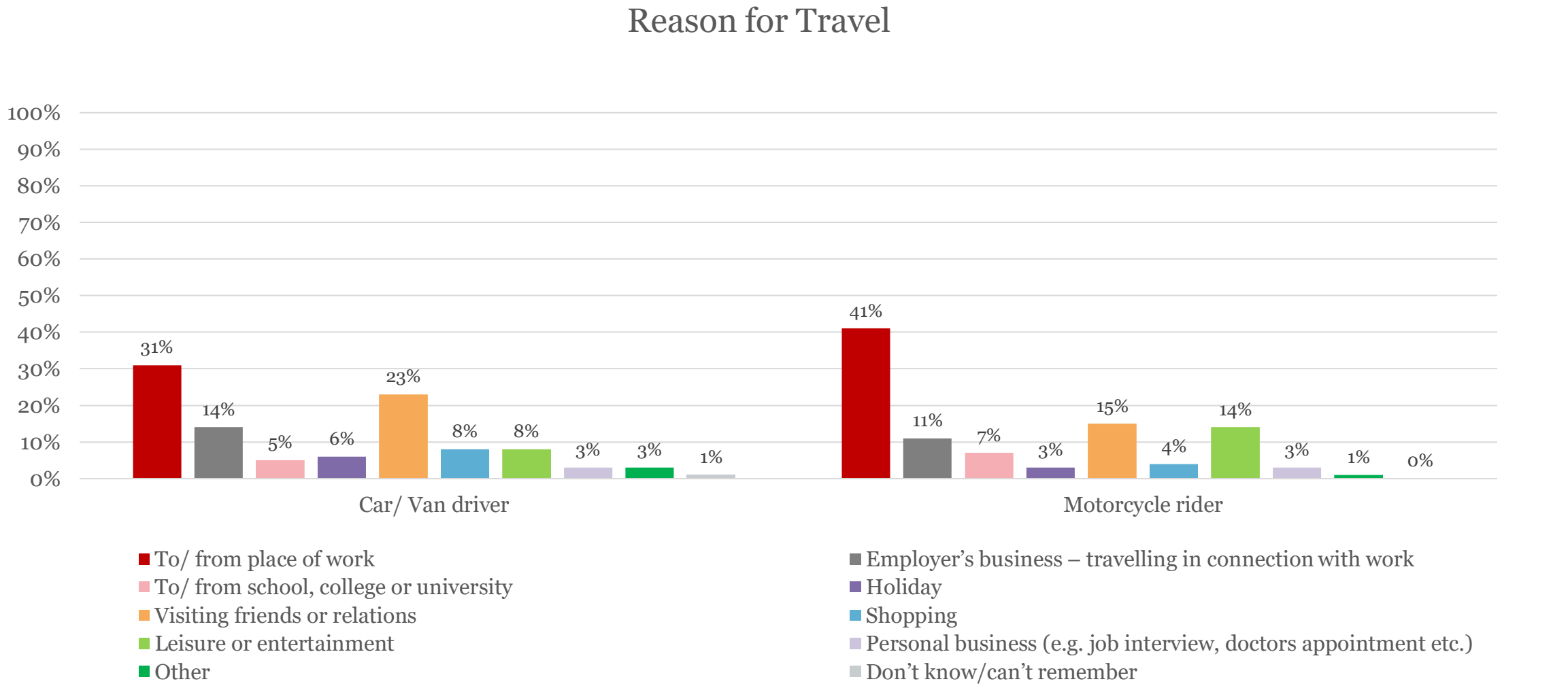
Initial data also demonstrated a difference in the commuter, business and leisure profiles compared to previous research. Given travel restrictions/guidance to minimise travel, except if you could not work from home, it is not surprising that commuting journeys were more prevalent than business or leisure journeys. Quotas on the data did increase the number of leisure users however, such that the final profile was closer to expected usage post-Covid than would otherwise have been the case.

Only 16% of car and van drivers said their typical journeys involved fewer than 10 miles on the SRN – there is likely to be an overestimation of length (although may also represent some change in travel patterns during lockdown/ restrictions or return trips)

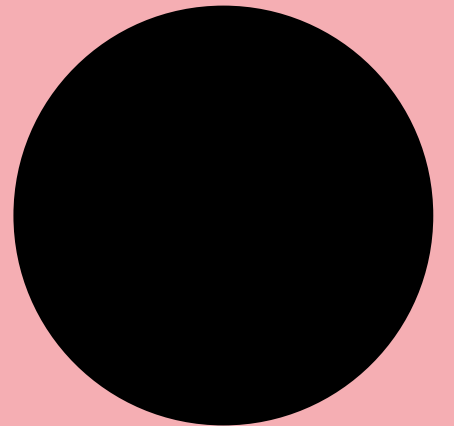
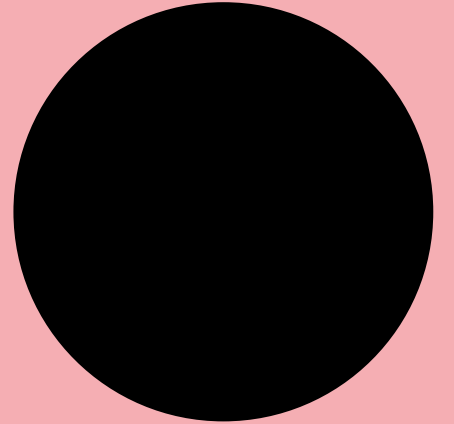
Typical length of journeys undertaken on the SRN



Overall, 36% of car and van drivers commuted to work/ college, 14% made journeys for work purposes and 48% made leisure journeys most often on the SRN



Summary of main findings



Summary – Priorities (i)

Overall, road surfaces are the main priority for improvement. This is demonstrated consistently across both the trade off prioritisation exercise and the spontaneous improvement requests.

Almost 1 in 5 car and van drivers rate the quality of road surfaces on the SRN as poor with potholes and cracks being the main concerns.

Safer design and upkeep of roads is the second highest priority for improvement among car and van drivers. Spontaneous comments suggest that Smart Motorways play some role in this (although it is worth highlighting that this has been a subject widely discussed in the media in recent months so may have been top of mind as a result).

The next most important elements to prioritise for improvement are better management of roadworks, better management of unplanned delays and information on unplanned delays.

The only change in the top 5 priorities for improvement compared to 2015 is for having better behaved drivers (which has fallen from third most important factor in 2015 to sixth in 2021).

Summary – Priorities (ii)

Priorities across other user types are all very similar.

Not surprisingly, being able to make journeys by electric vehicle and environmental issues are more important to plug in electric vehicle drivers.

Potentially reflecting their particular vulnerabilities, motorcycle riders are more likely than other users to prioritise focusing on getting better behaved drivers.

Commercial drivers want better delay handling and more information on planned delays.

Summary – Other factors

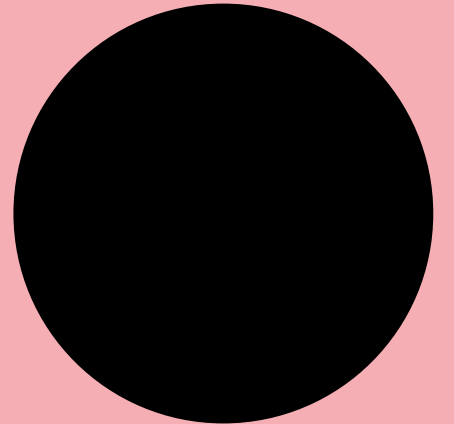
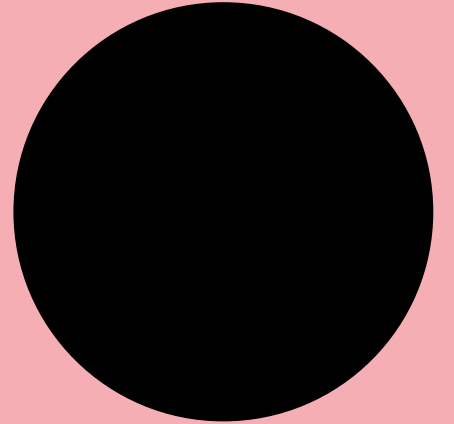
Maintaining the current roads is a greater priority across all user groups than investing in new roads or additional lanes etc.

Other drivers' behaviours tend to be the main cause of stress for drivers, followed by delays. Tailgating and changing lanes without indicating are the main causes of concern and could perhaps form part of information/ education campaigns.

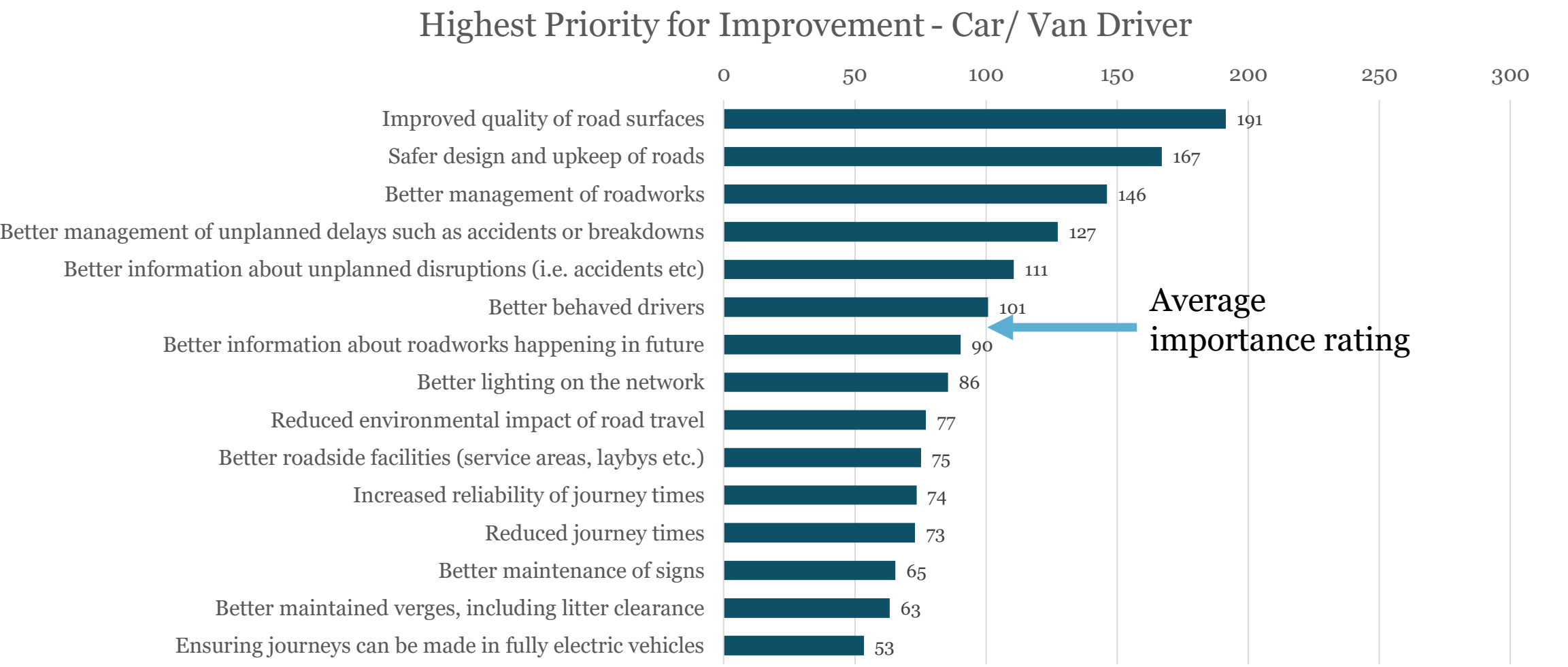
Whilst clearly there is some bias in respondents' preferred methods of road funding towards aspects least likely to impact them, tolls/ road charging schemes are seen as less fair overall than other ways of funding (coach and bus drivers are more likely to accept city centre road charging schemes – potentially reflecting their frustration with traffic levels in city centres on non-SRN roads).

Investment in longer lasting batteries and quicker charging technology are the aspects most likely to be seen as important investments into electric vehicles. However, it is interesting to note that, overall, those who currently have electric vehicles are less likely to request investment, which may suggest that perception is worse than the reality experienced by current users. For non-current electric car users measures to give priority to electric vehicle users would not be popular.

Main Findings – Car and Van Drivers



Overall, quality of road surfaces is the main improvement priority for car and van drivers, followed by safer design of roads and better management of roadworks



Overall priorities are very similar compared to the previous research conducted in 2015

Overall priorities for improvement compared to 2015 – Car/ Van Drivers

	2021	2015
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 (i.e. accidents etc)	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 etc.)	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

Increased importance:

Management of, but particularly information on unplanned disruption

Reducing environmental impact

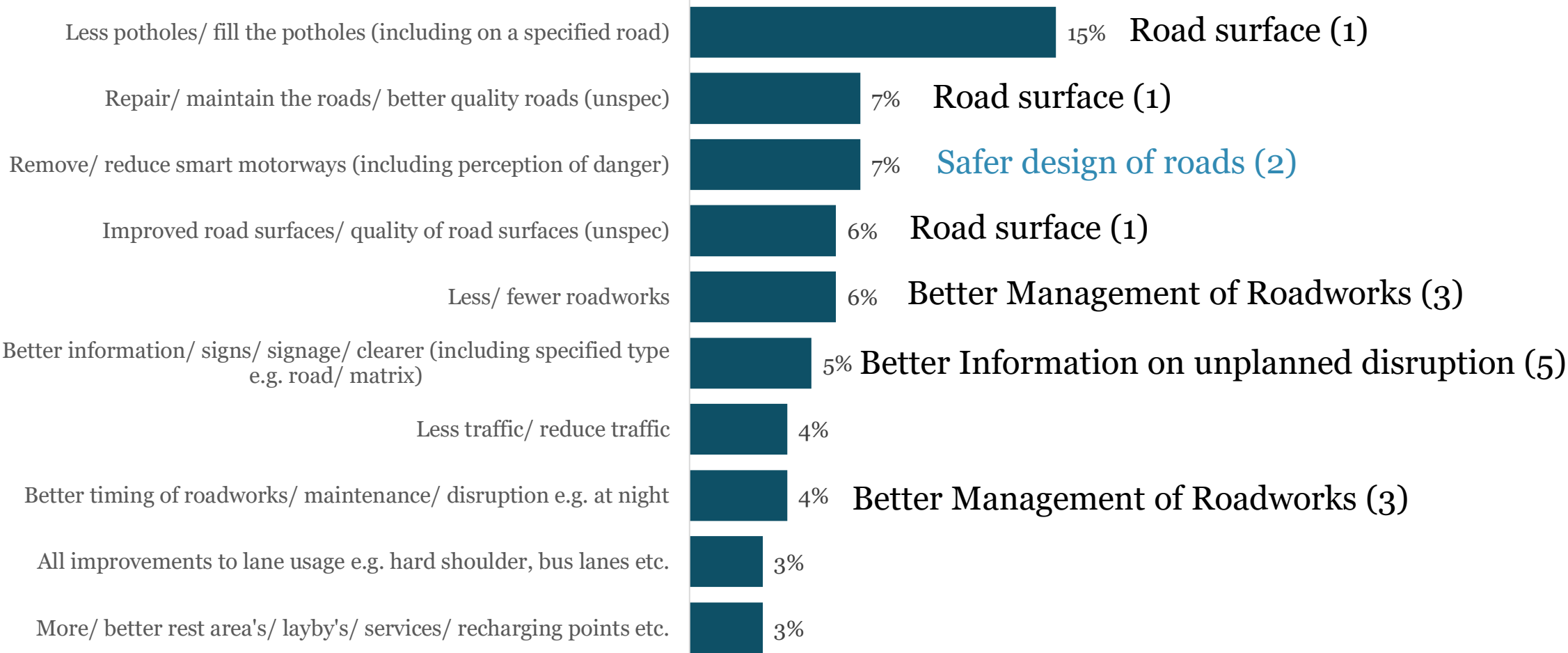
Reduced importance:

Having better behaved drivers

Reduce journey time and increasing the reliability of these times

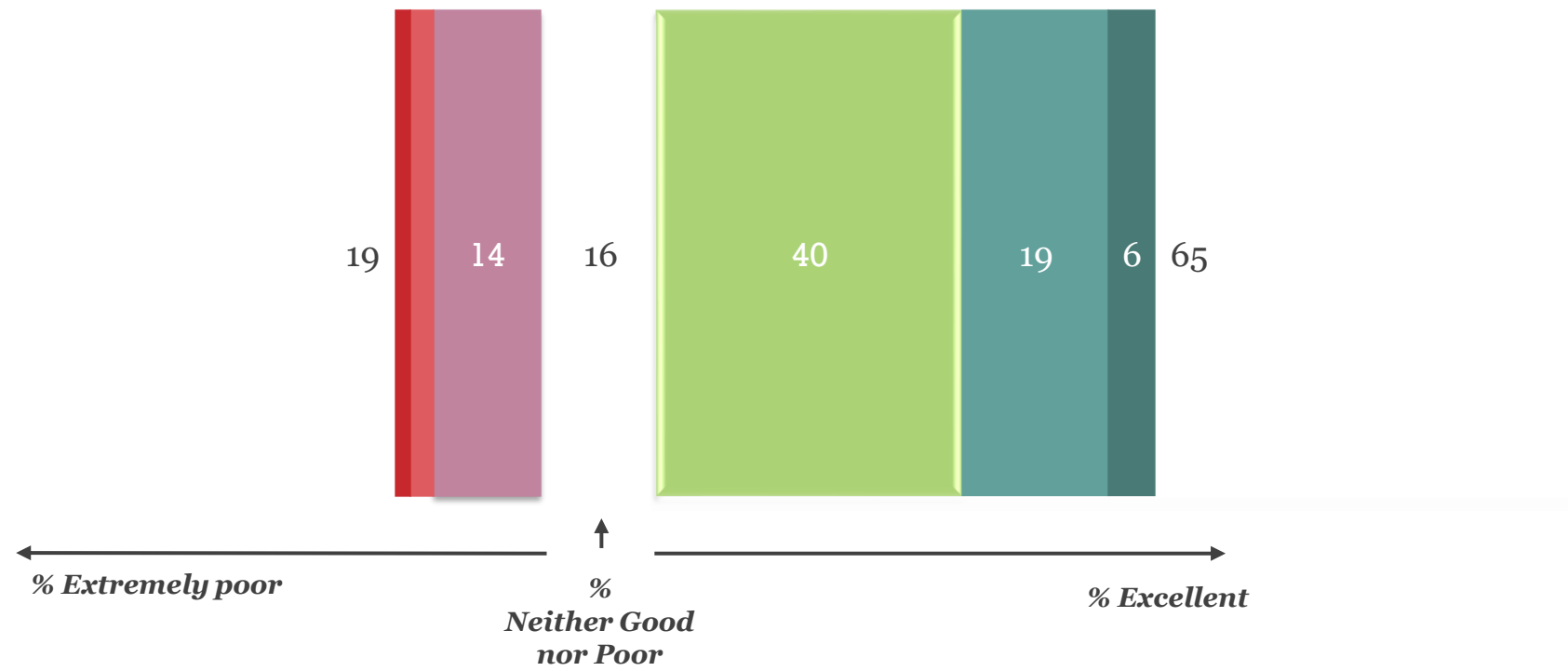
Improvements raised spontaneously tend to correlate to the top priorities for improvement with fewer potholes the most frequently mentioned specific improvement

Suggested Improvements to the SRN (Spontaneous mentions) – Car and Van drivers



Almost 1 in 5 car and van drivers rated the quality of road surfaces on the SRN as poor

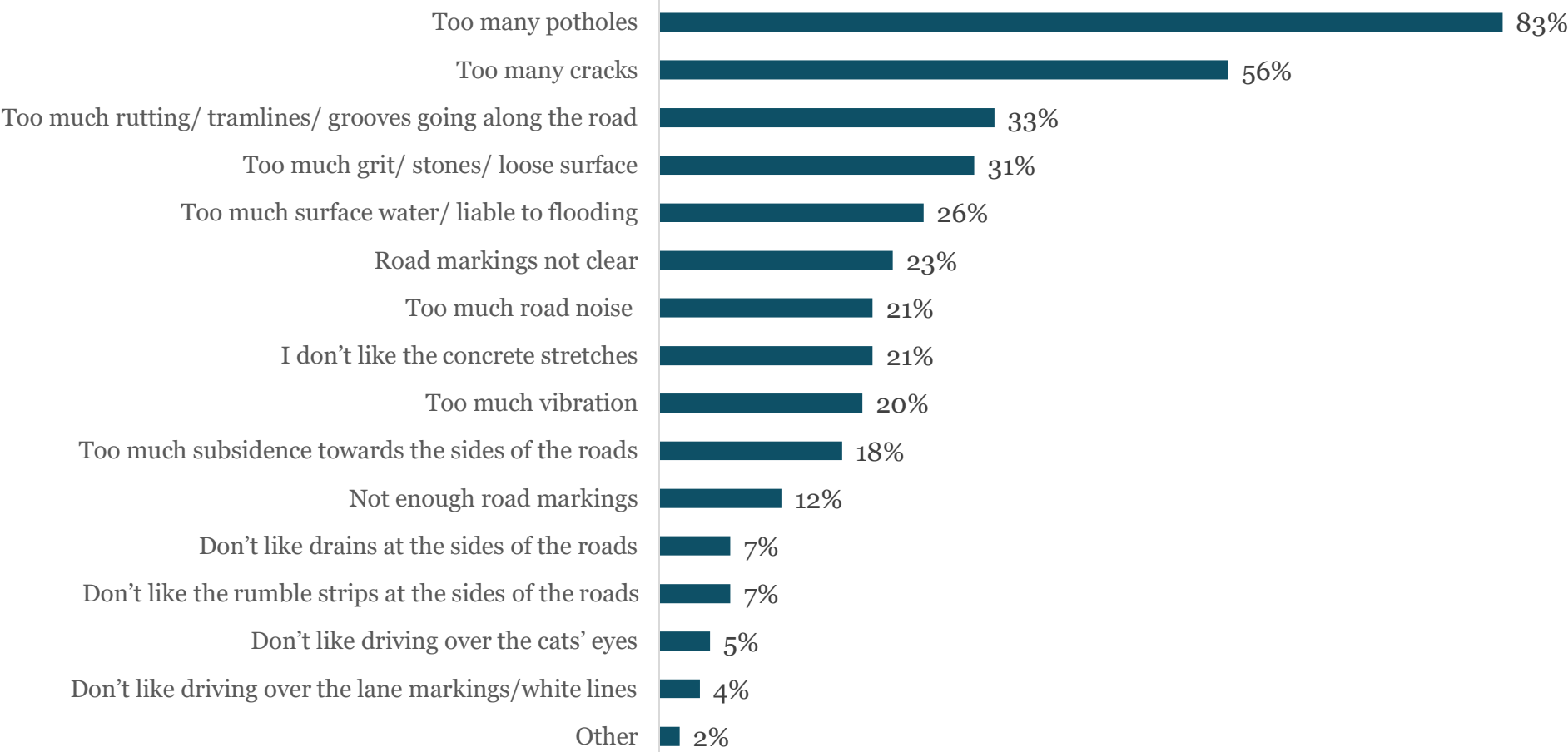
The quality of the road surface on England’s motorways and major ‘A’ roads – Car and Van Drivers



20 Q44. Overall how would you rate the quality of the road surface on England’s motorways and major ‘A’ roads
Base: Main Drivers: Car/Van (4818);

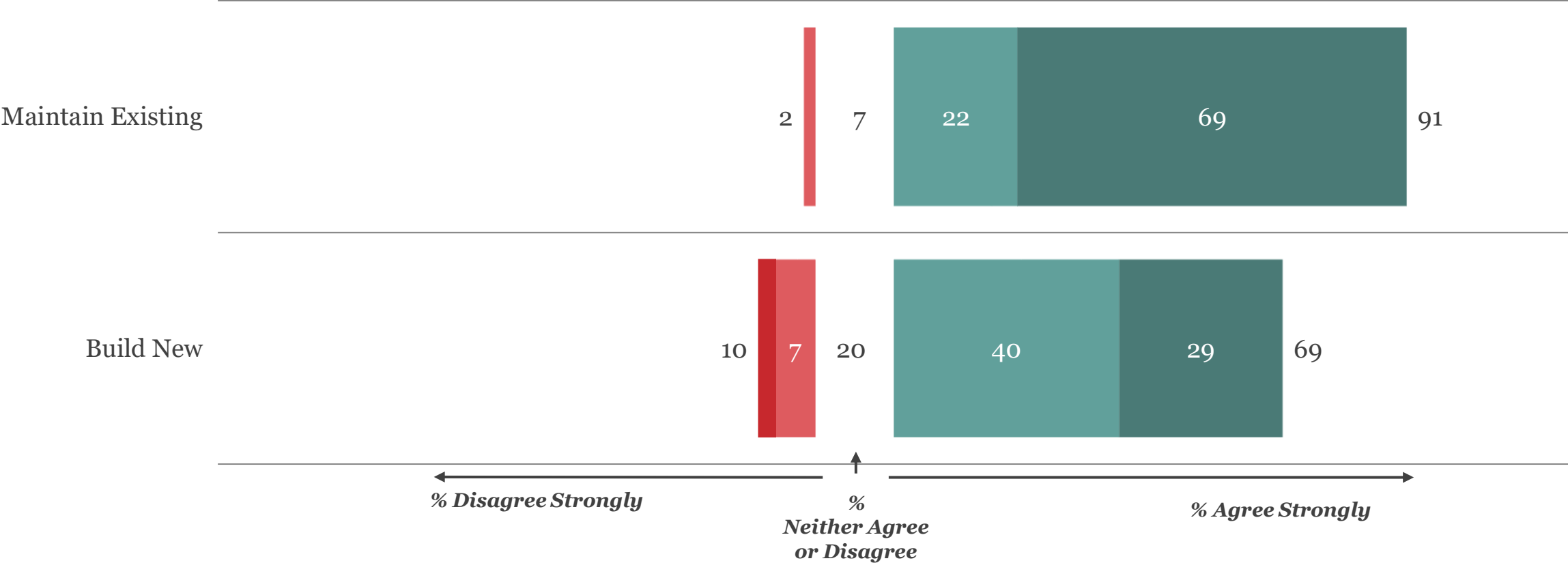
Too many potholes and cracks were the main reasons given by those rating the SRN road surfaces as poor

Reasons for poor quality of road surface on England’s motorways and major ‘A’ roads – Car and Van Drivers



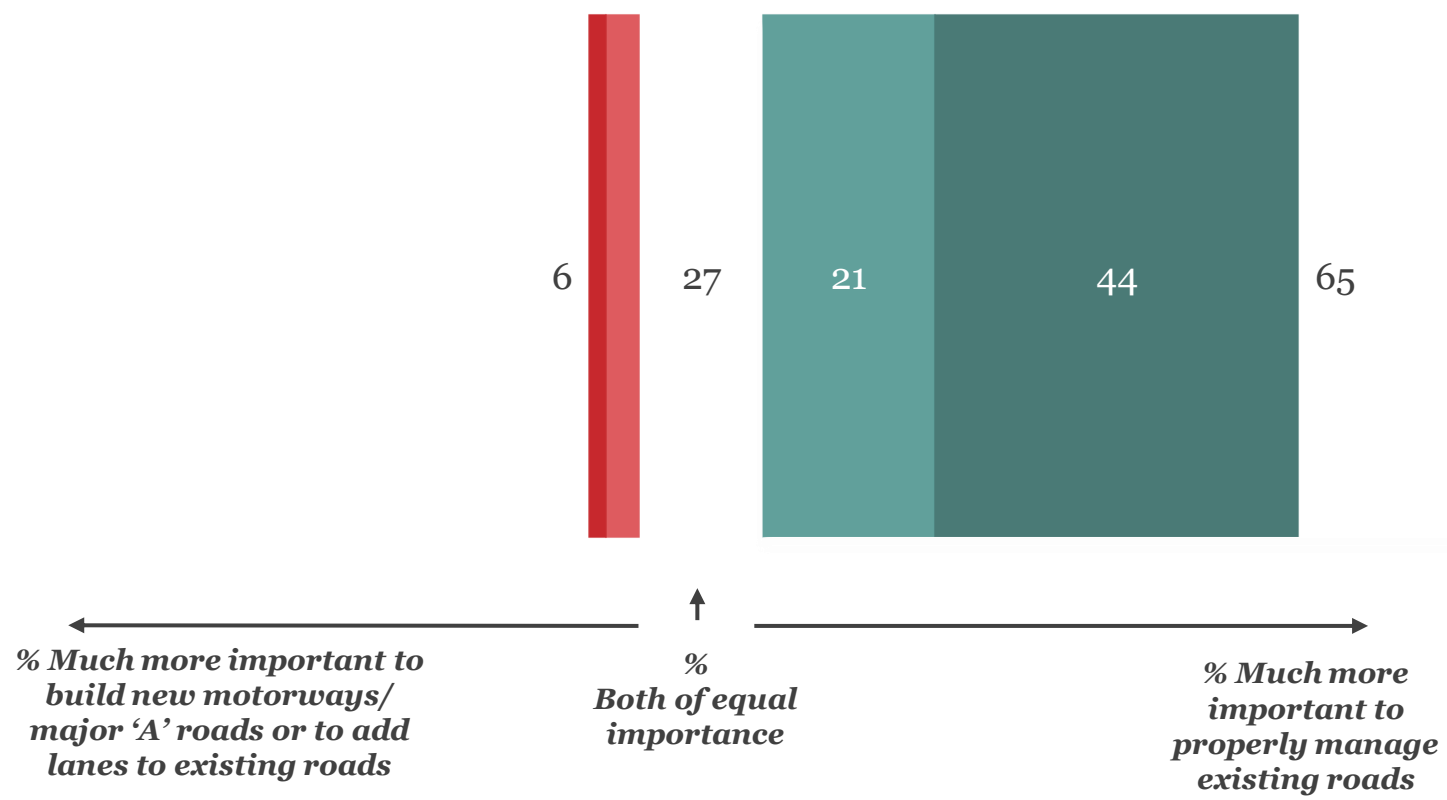
Whilst 69% agree strongly that it is very important to properly maintain existing SRN roads only 29% say the same for building new ones/ adding new lanes

Agreement with statements that it is very important to properly maintain the existing motorways and major 'A' roads and to build new motorways/ 'A' roads/ add new lanes to existing roads – Car and Van Drivers



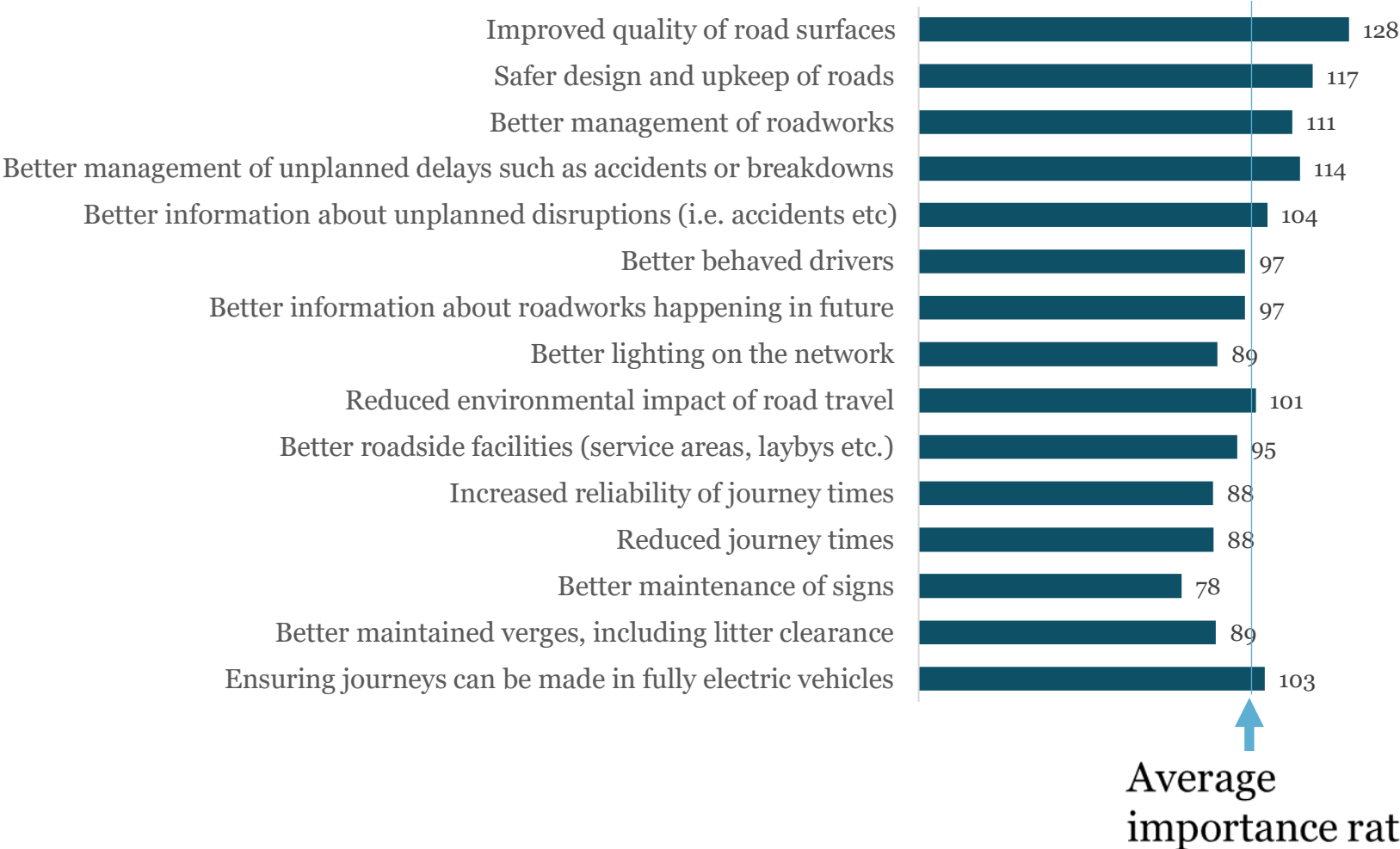
Almost two-thirds feel it is more important to maintain existing roads as opposed to building new ones

Importance of properly maintaining the existing motorways and major 'A' roads and of building new motorways and major 'A' roads / adding new lanes to the existing roads – Car and Van Drivers



Drivers of electric vehicles have above average priority for ensuring journeys in these types of cars and vans can be made and also for environmental factors

Highest priority for improvement – Plug in Electric Car/ Van Drivers

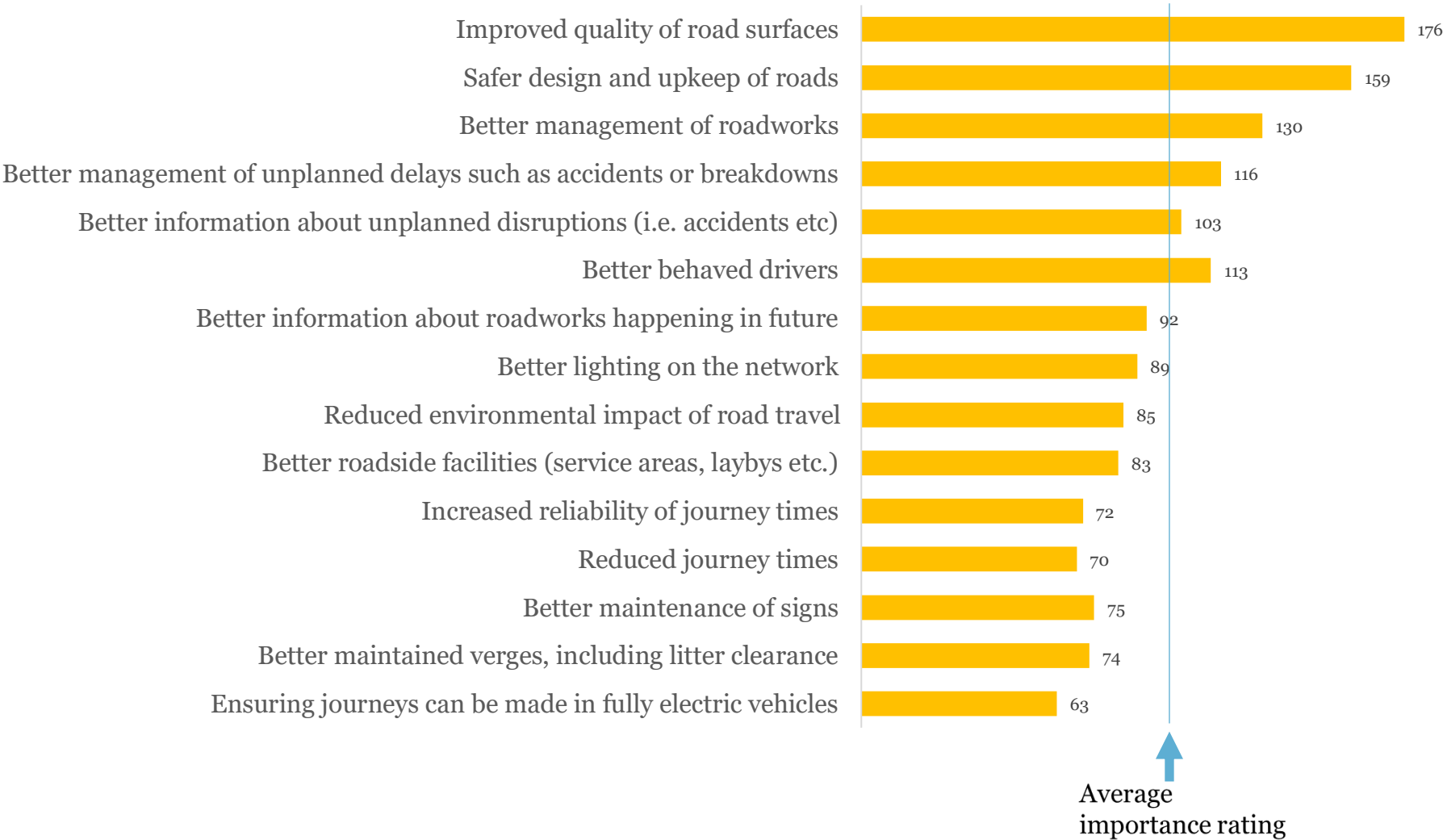


Ensuring journeys can be made in fully electric vehicles and environmental issues are more important to Plug in electric vehicle drivers.

Improvements to roadside facilities are also relatively more important.

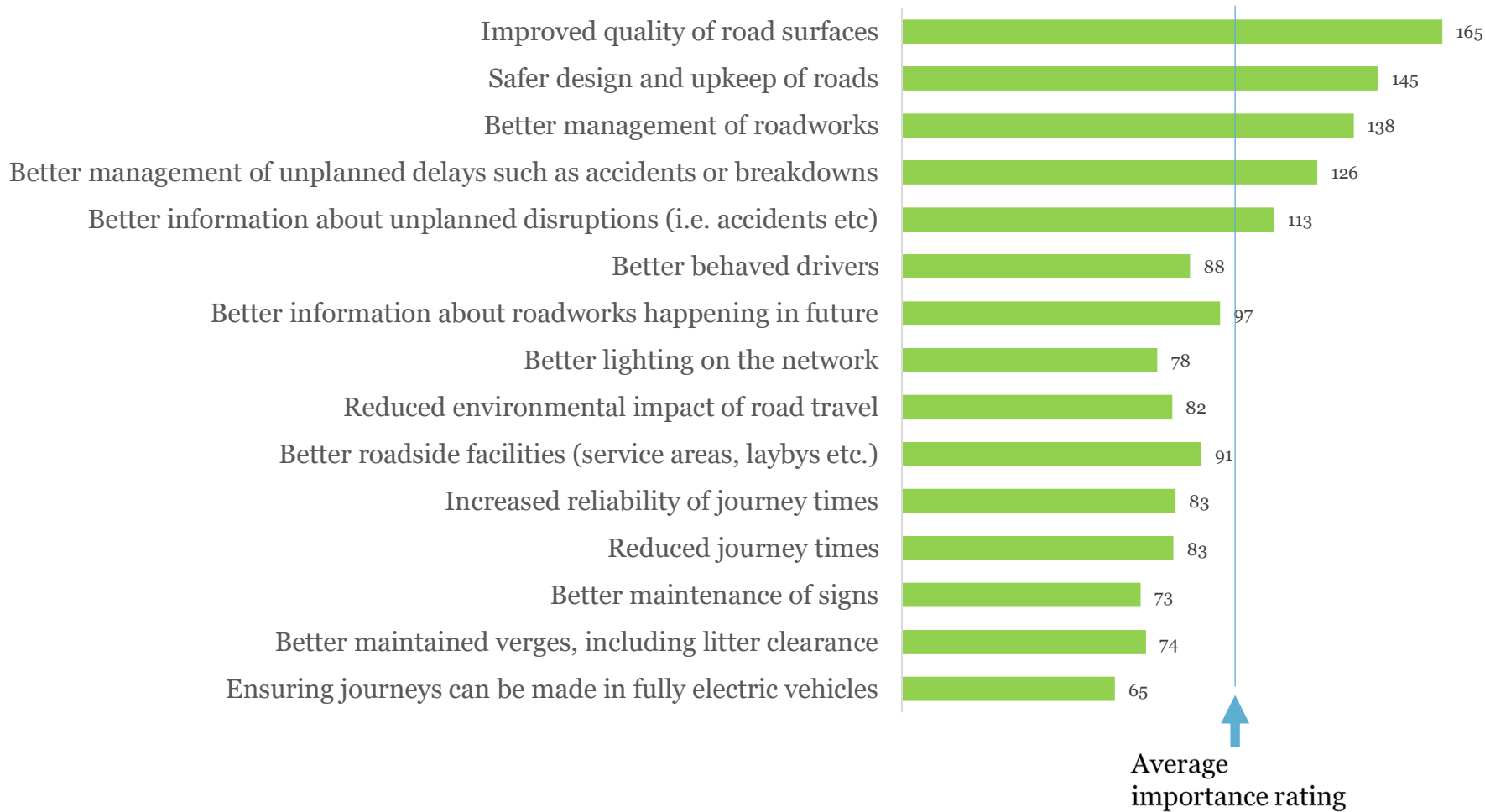
Better behaved drivers are seen as more of a priority for improvement by motorbike riders

Highest priority for improvement – Motorcycle Riders



Priorities for HGV/ LGV drivers tend to follow the general profile although information on upcoming roadworks and better roadside facilities move up the ranking list for these drivers (lighting is less important)

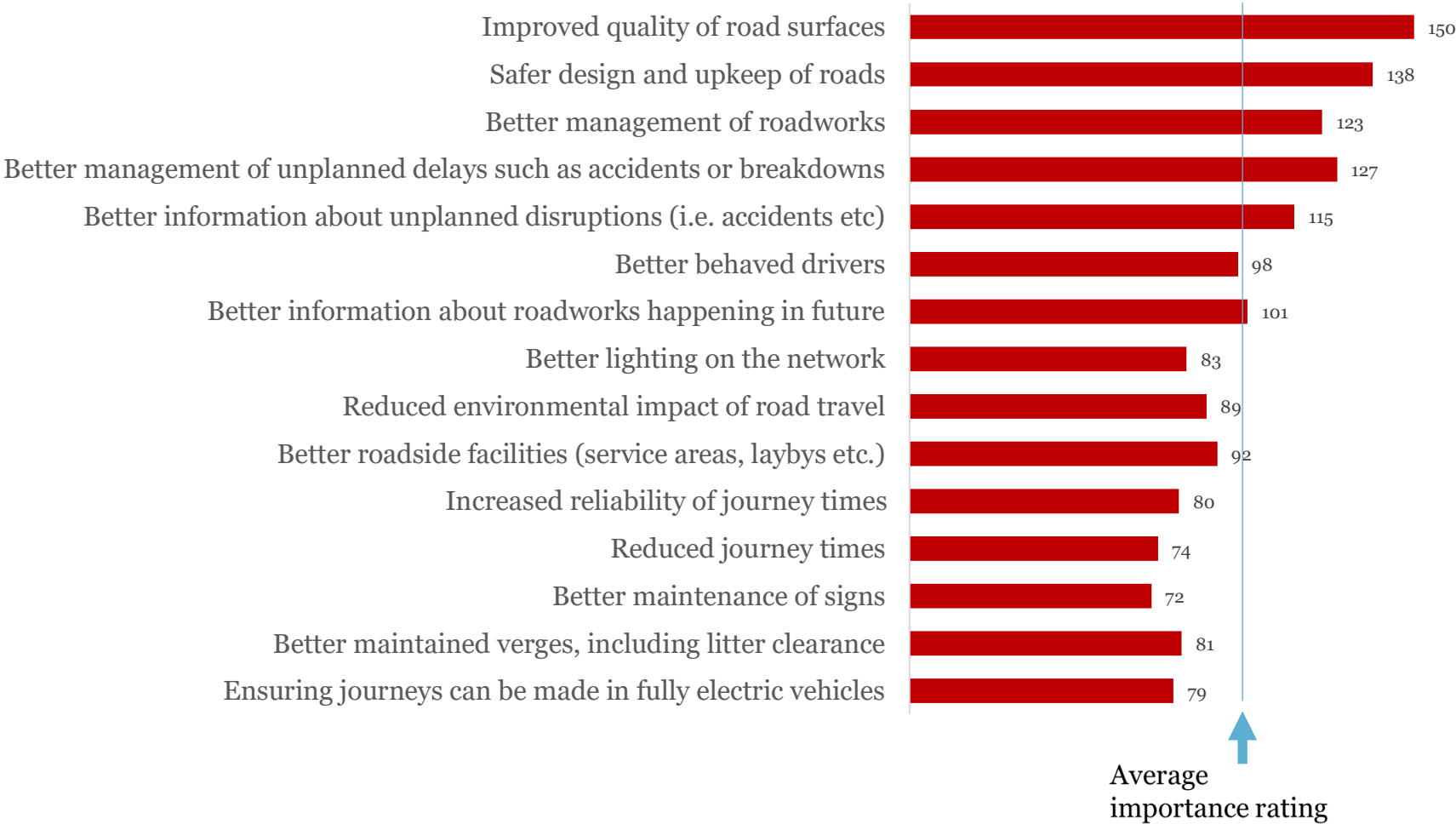
Highest priority for improvement – HGV/ LGV Drivers



26 Q27. 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: Main Driver: HGV (249);

The order of priorities for coach/ bus drivers is also very similar to that for other drivers – management of unplanned delays vs roadworks do swap places but remain in the top 4 most important factors

Highest priority for improvement – Coach/ Bus Drivers



Summary of differences in priorities for improvement by user group (i)

Overall priorities between different sub-groups of drivers are all very similar (full data has been provided in the Appendix to this document). Some observations are noted below (but please note these are minor differences with the broad hierarchy of importance the same for all groups).

Business users and commuters are slightly more time sensitive, with reducing journey times and increasing their reliability being slightly more important than environmental issues or better roadside facilities.

For leisure users the differential between the importance of the top 3 factors (road surfaces, safe design and management of roadworks) and the other factors is more acute.

There are no real differences by Highways England Region worth highlighting.

There are no changes in the profile of priorities for those with or without disabilities (although the relative difference in importance of the most important aspects when compared to the least important is more marked for non-disabled users).

Summary of differences in priorities for improvement by user group (ii)

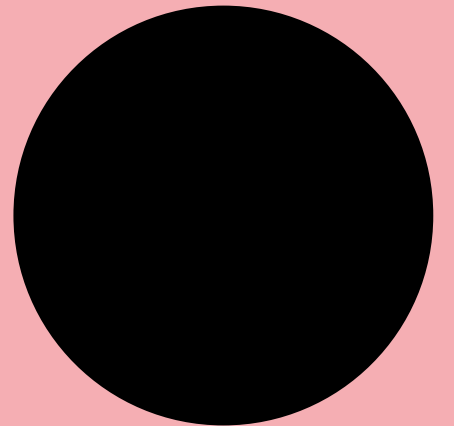
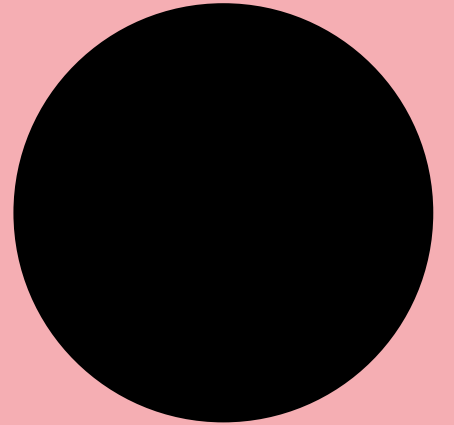
There are no real differences in priorities for improvement between men or women.

Older drivers tend to have a much stronger preference for the top 3 factors (road surfaces, safer design and management of roadworks) than for those at the bottom of their priority list e.g. environmental factors/ electric car usage.

Whilst the overall order of priorities is very similar, younger drivers have a much shallower hierarchy, with similar ratings for ensuring journeys can be made by electric vehicles, maintenance of verges and signs all rated very closely. However, the main distinguishing factor is that environmental issues are much more important to this group.

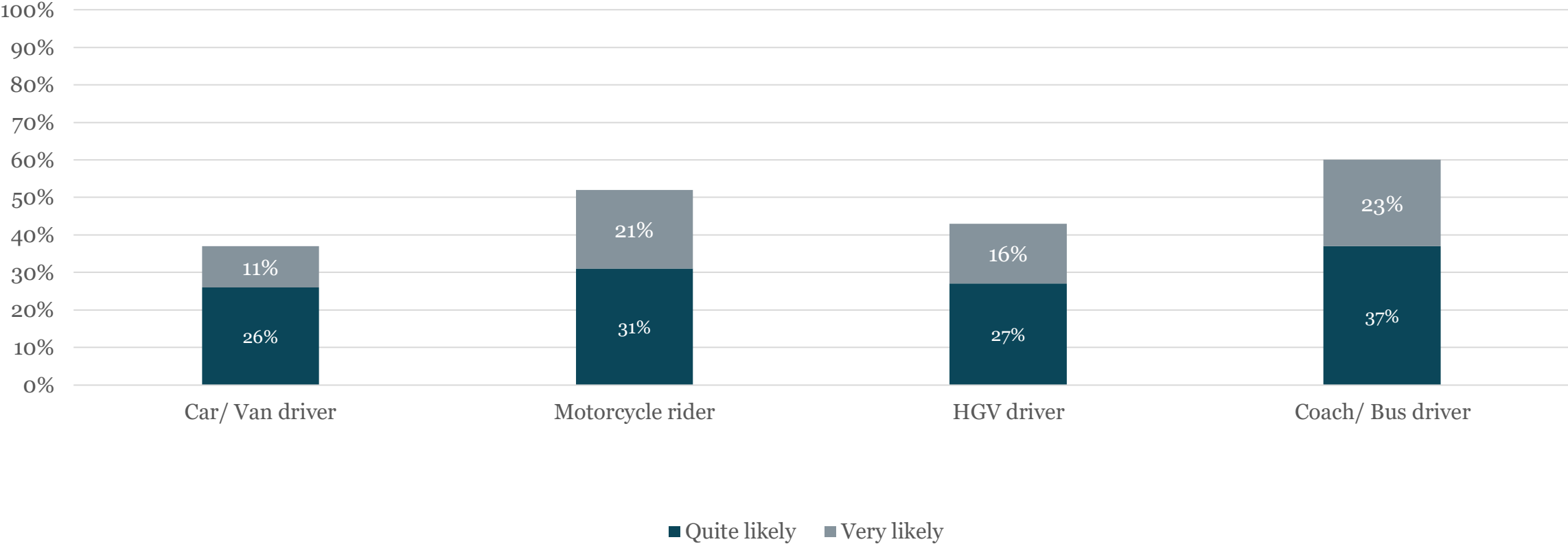
Those who tend to drive more miles in an average year tend to have a stronger preference for those factors that rate as most important compared with those that they find as less of a priority for improvement.

Electric Vehicle Perceptions



Just over a third of non-plug in electric car/ van drivers say they are likely to purchase a plug in full electric vehicle in the next few years. There is a higher likelihood to do this amongst motorcycle/ moped riders and coach/ bus drivers.

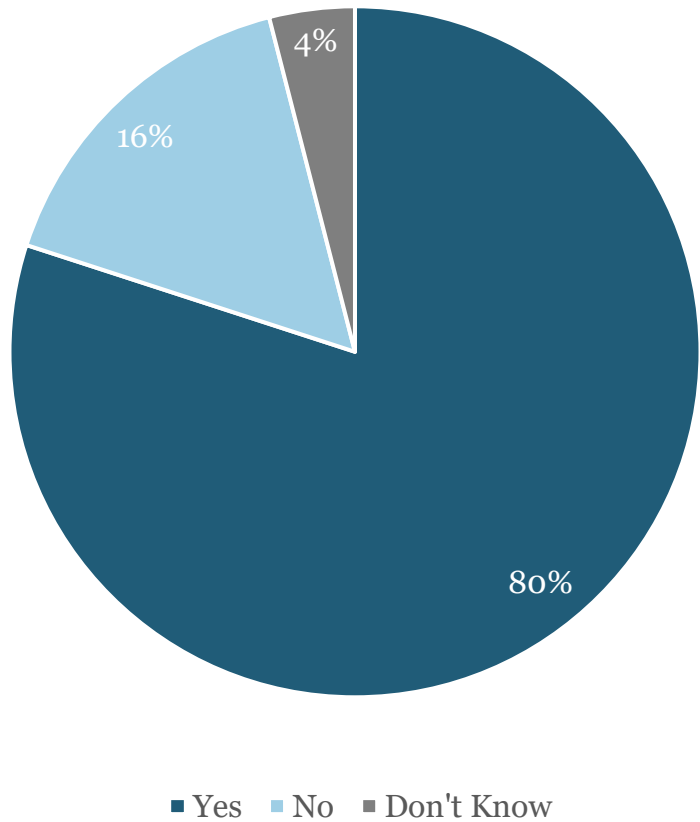
Likelihood to Purchase an Electric Vehicle



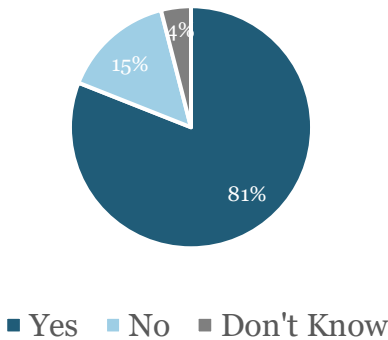
31 Q34. Overall how likely do you think it is that you will purchase a plug in full electric (eg not a Hybrid) vehicle in the next few years?
Base: Excludes current plug-in electric vehicle drivers: Main Drivers: Car/Van (4424); Motorcycle (350); HGV (199); Coach/ Bus (84)

4 in 5 respondents were aware that the law will prohibit the sale of new diesel, petrol and some hybrid cars and vans in the UK after 2030

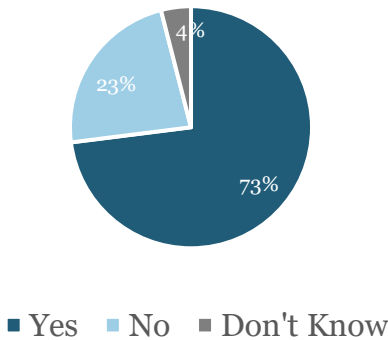
Aware of the 2030 Law Change – Overall



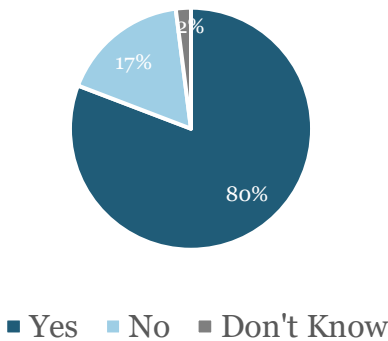
Car/Van Drivers



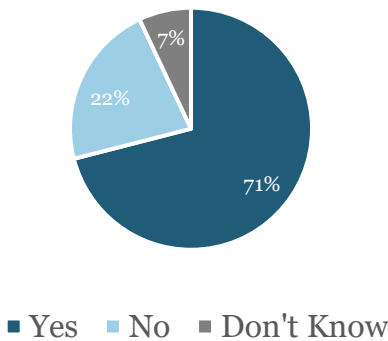
Motorcycle Riders



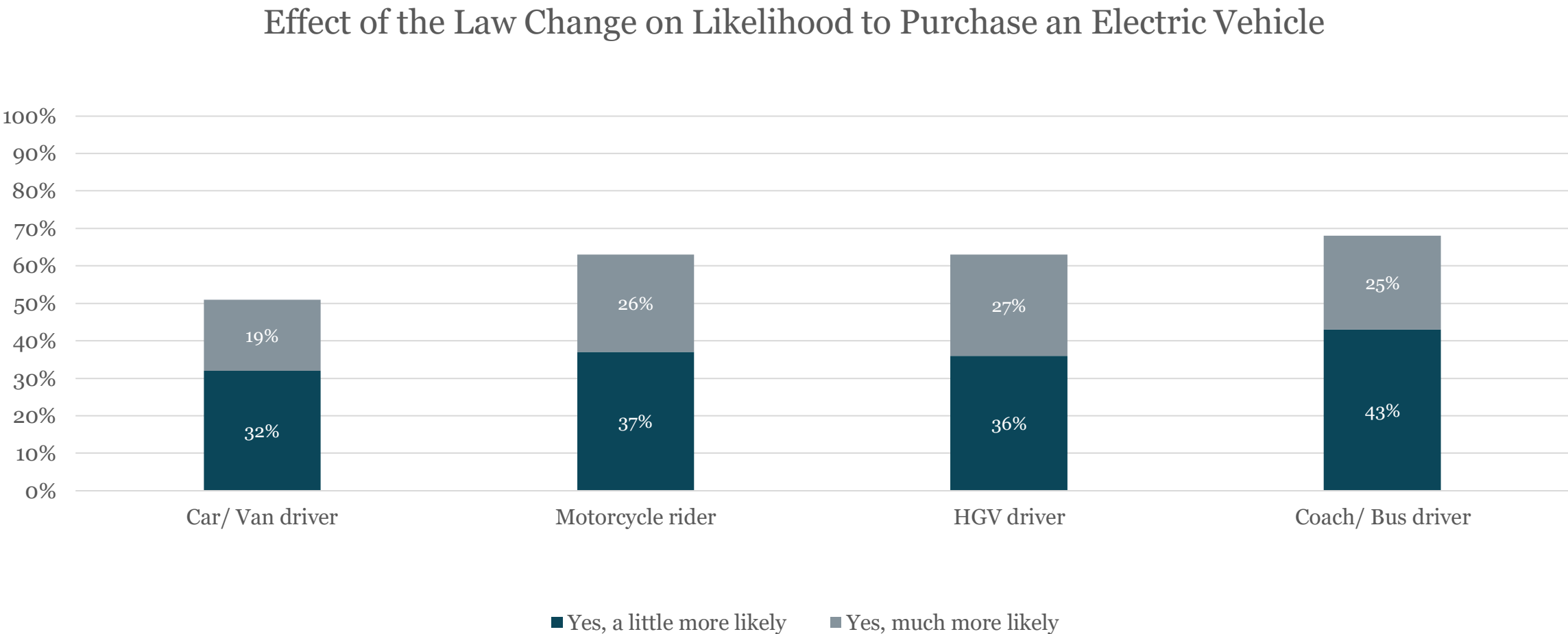
HGV Drivers



Bus/Coach Drivers



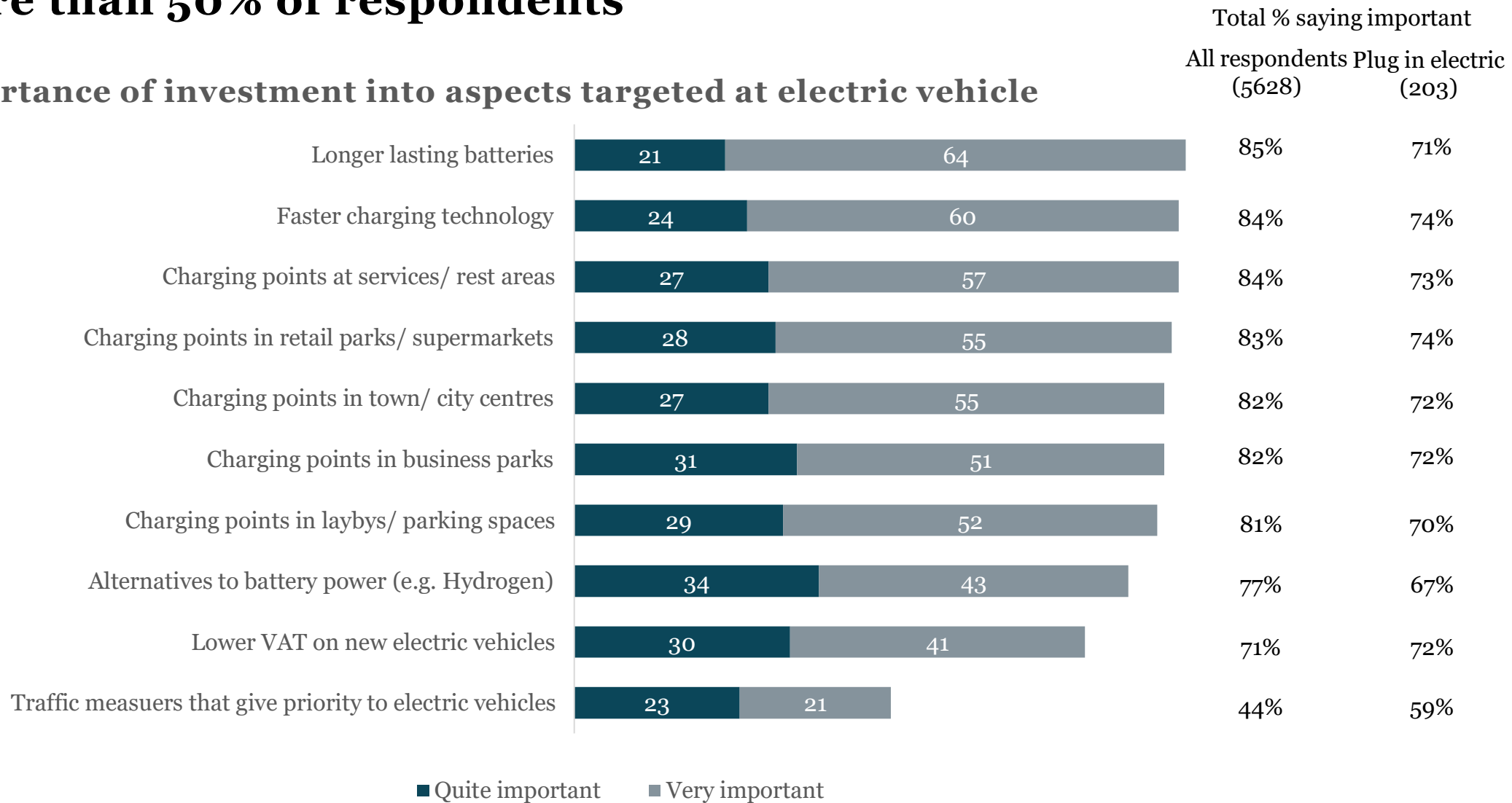
The law change that bans the sale of non-electric vehicles does increase the likelihood of purchasing electric vehicles in the next few years (1 in 5 car/ van drivers say they are much more likely to purchase a plug in electric vehicle as a result)



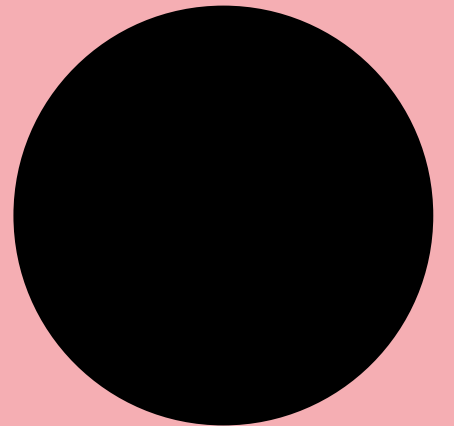
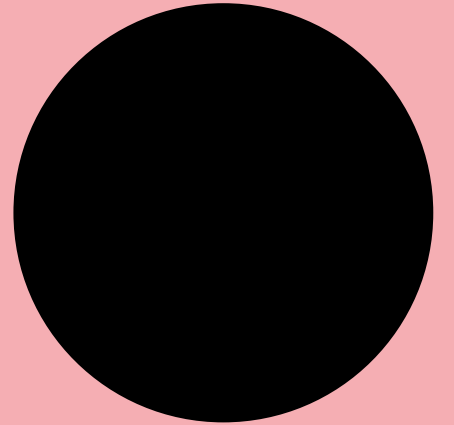
33 Q36. Does the phasing out of new diesel/ petrol/ hybrid cars and vans make you more likely to purchase a plug in electric vehicle in the next few years?
Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)

Overall a number of factors were seen as very important areas to invest in by more than 50% of respondents

Importance of investment into aspects targeted at electric vehicle

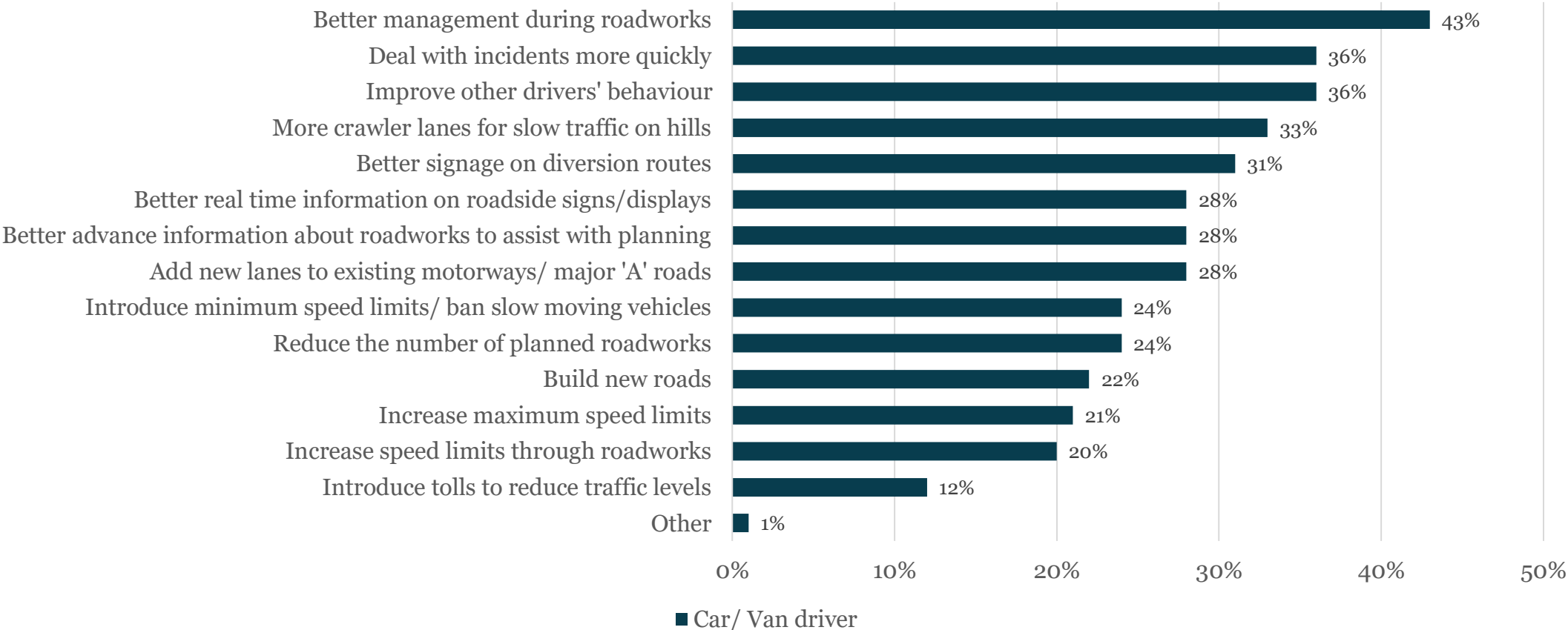


What can be done to reduce journey times



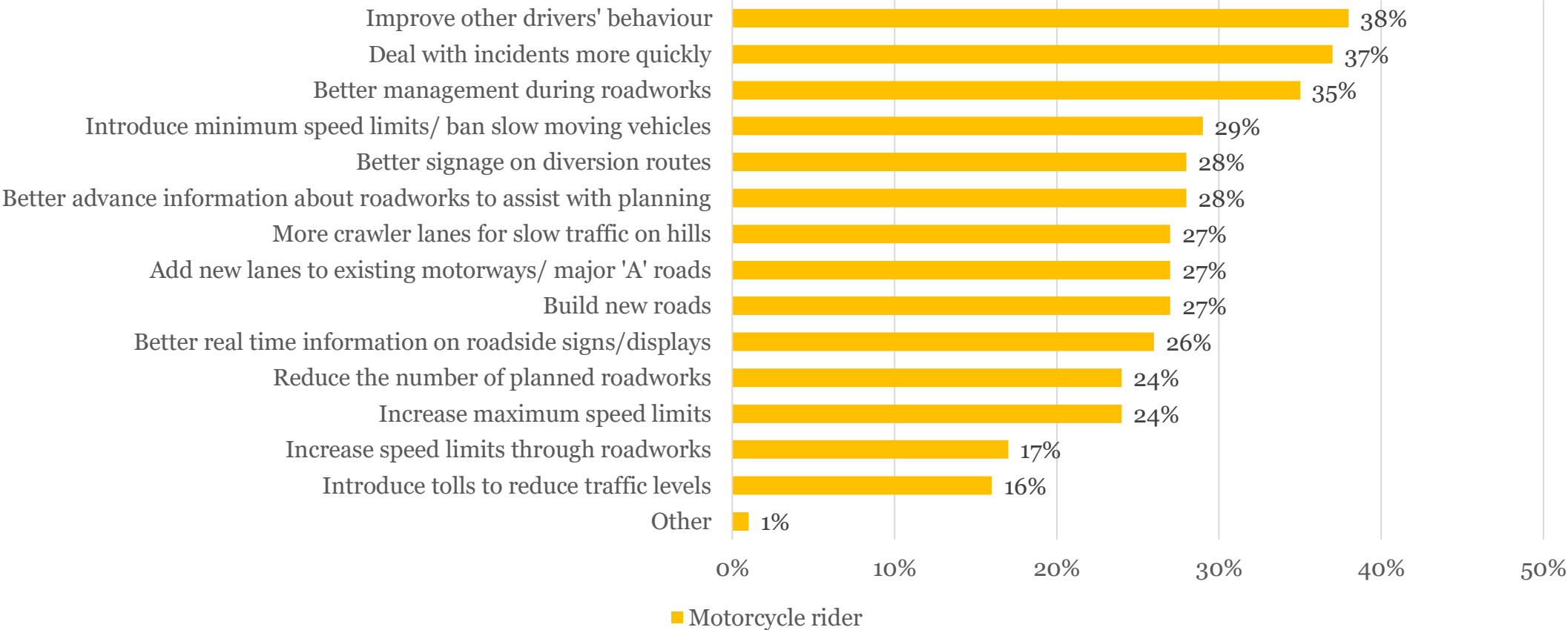
Car and van drivers believe better management of roadworks would be the most beneficial way of reducing journey times, followed by dealing with incidents more quickly and improving other drivers’ behaviour.

Highest Priority to reduce journey times – Car/Van Drivers



Whilst motorcyclists have the same top three priorities for improvement as car and van drivers, other drivers' behaviour is the most important factor for these users

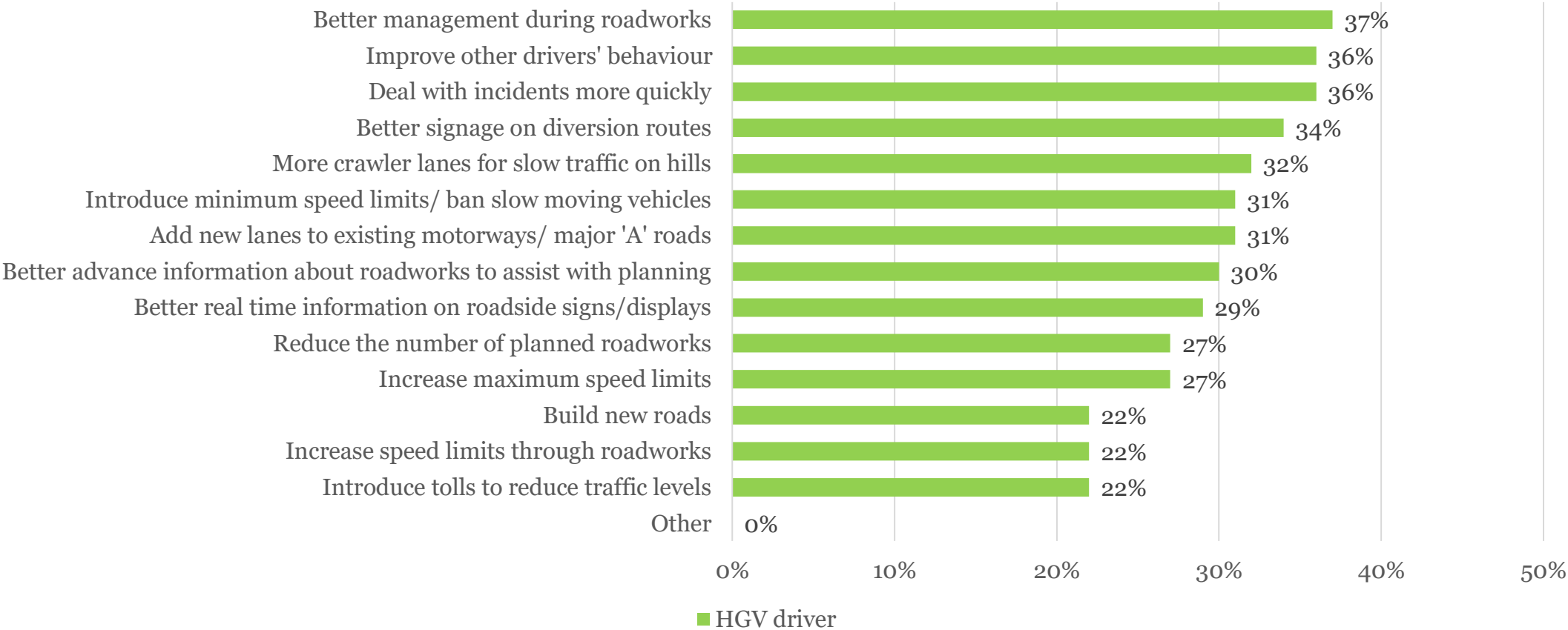
Highest Priority to reduce journey times – Motorcycle Riders



37 Q43. Below are a number of things people have said could be done to reduce journey times on England's motorways and major 'A' roads, can you please tell us which of these you think would be most beneficial to you in terms of reducing journey times?
Base: Main Drivers: Motorcycle (407)

Whilst the top 3 factors are the same for HGV/ LGV drivers as other SRN users there is less differential between these factors and the next most important improvements

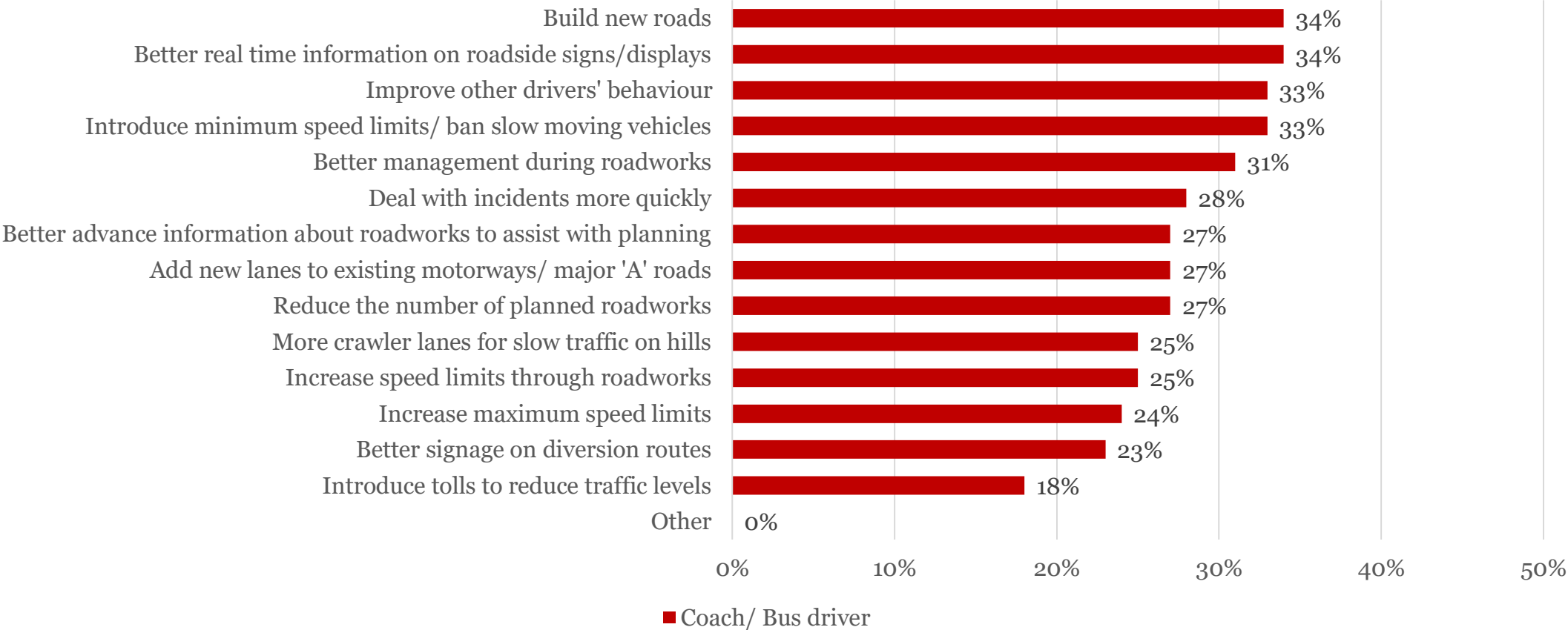
Highest Priority to reduce journey times – HGV Drivers



38 Q43. Below are a number of things people have said could be done to reduce journey times on England's motorways and major 'A' roads, can you please tell us which of these you think would be most beneficial to you in terms of reducing journey times?
Base: Main Drivers: HGV (249)

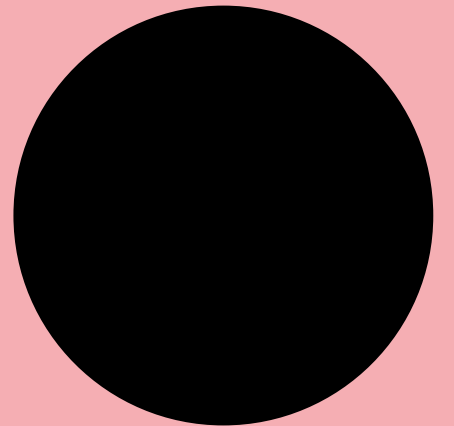
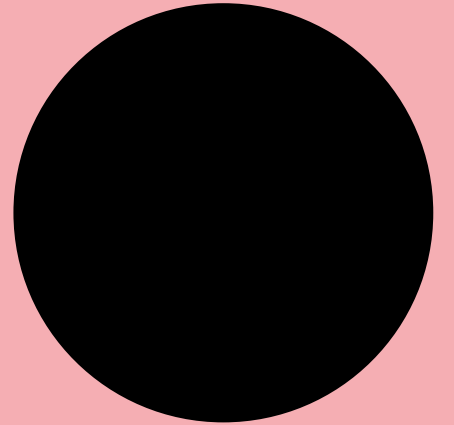
The top two priorities for coach and bus drivers differ from other users with building new roads and having better real time information coming out top for them

Highest Priority to reduce journey times – Bus/Coach Drivers



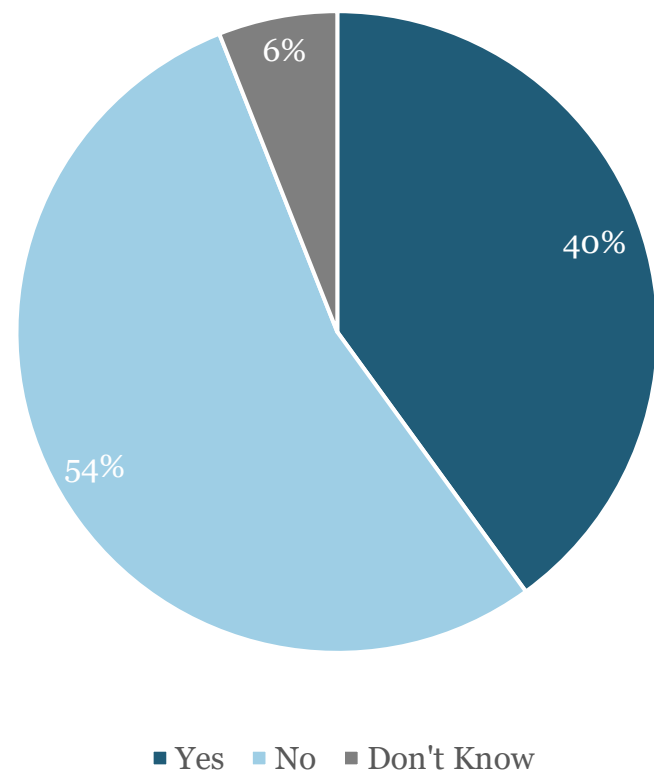
39 Q43. Below are a number of things people have said could be done to reduce journey times on England's motorways and major 'A' roads, can you please tell us which of these you think would be most beneficial to you in terms of reducing journey times?
Base: Main Drivers: Coach/ Bus (134)

Use of the SRN by cyclists, pedestrians and equestrians



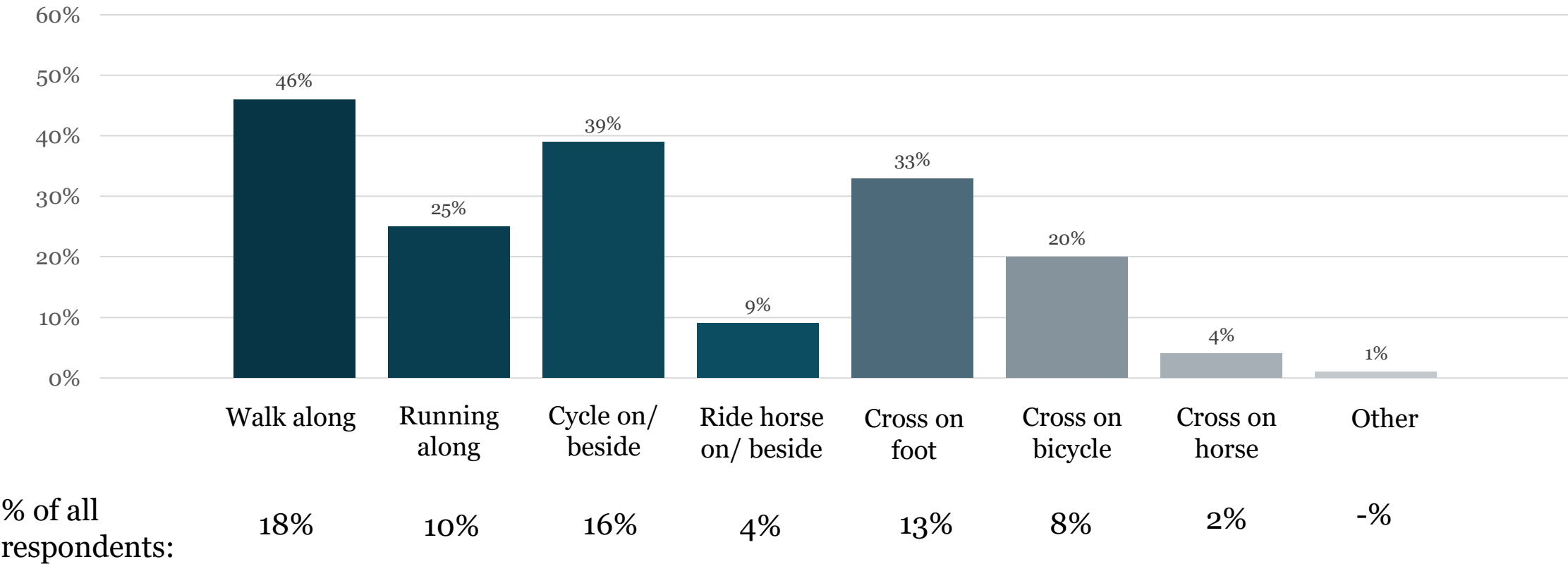
40% of respondents sometimes cross or use the SRN other than in/on a motor vehicle, e.g. on foot, bicycle, horse

% Crossing/ using the SRN other than in a Motor Vehicle – Overall



The main ways the SRN is used, other than in a motorised vehicle, is to walk along, cycle on or cross on foot

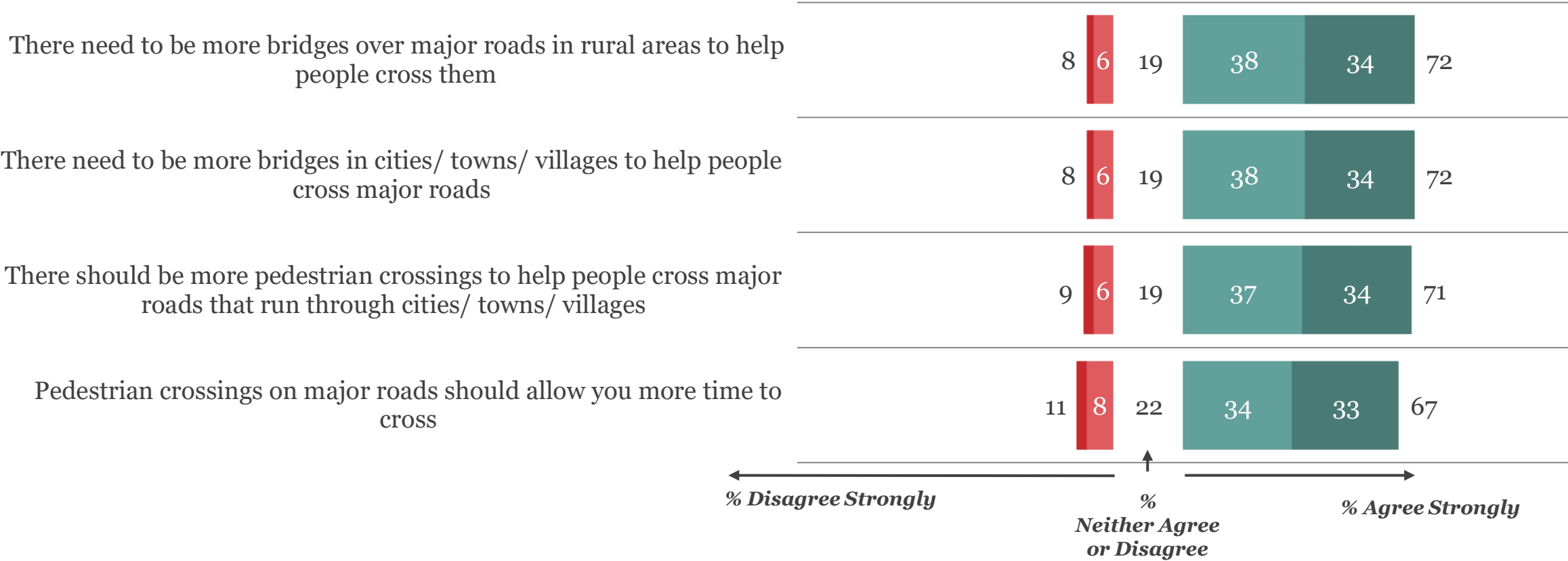
Other Uses of the SRN



42 Q31. How do you use these roads (for purposes other than driving on them?)
Base: All non-motorised users (2368);

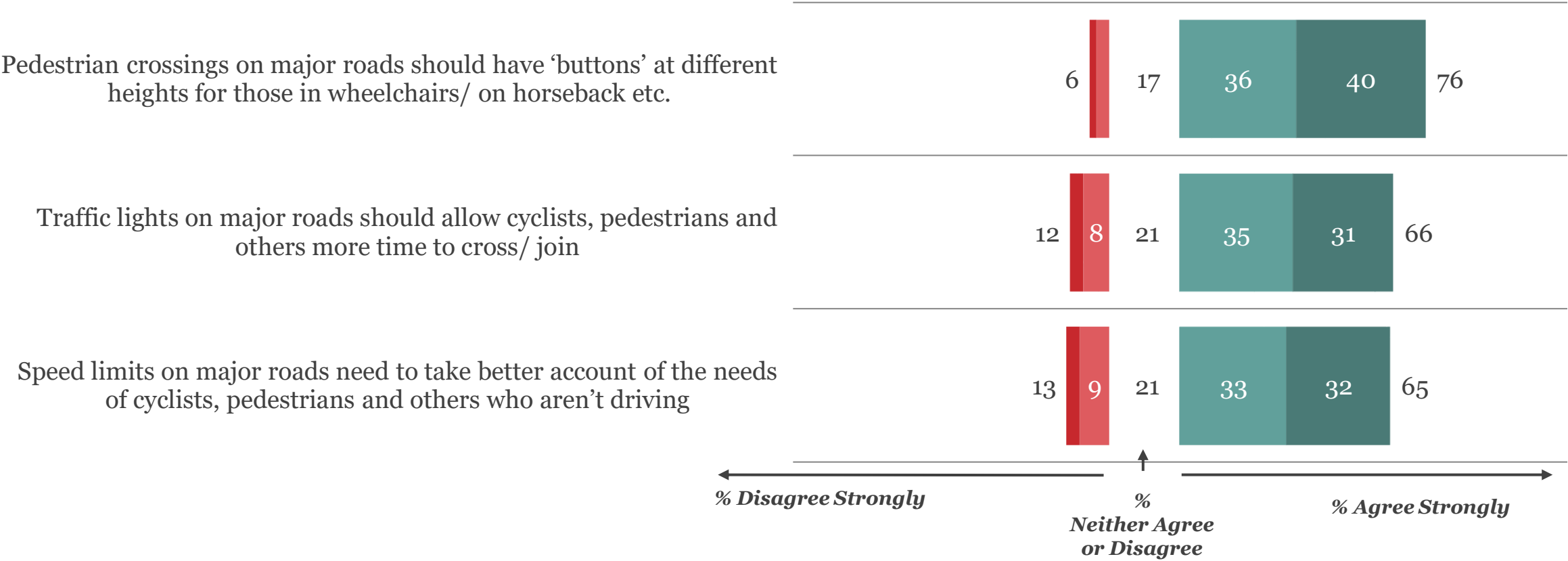
Overall there are very similar levels of agreement for having more bridges over and pedestrian crossings on the SRN. Two-thirds feel pedestrian crossings should give more time to cross

Agreement with Statements - Overall

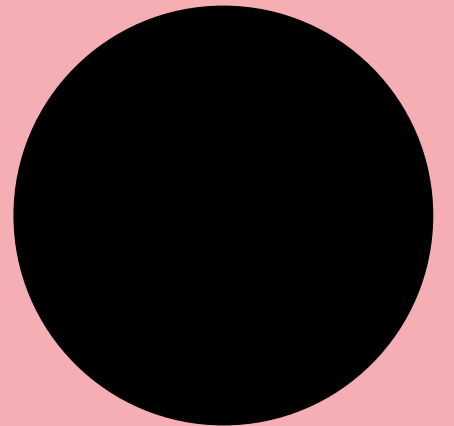
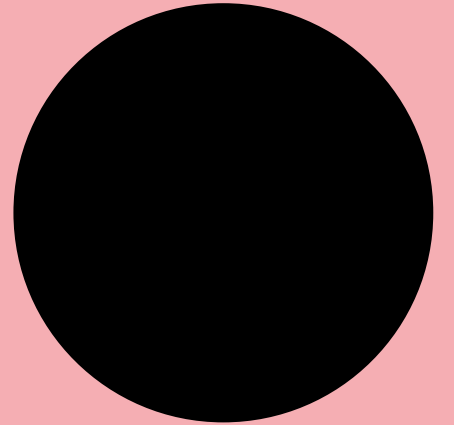


Agreement that pedestrian crossings should have buttons at different heights has the highest levels of agreement

Agreement with Statements - Overall

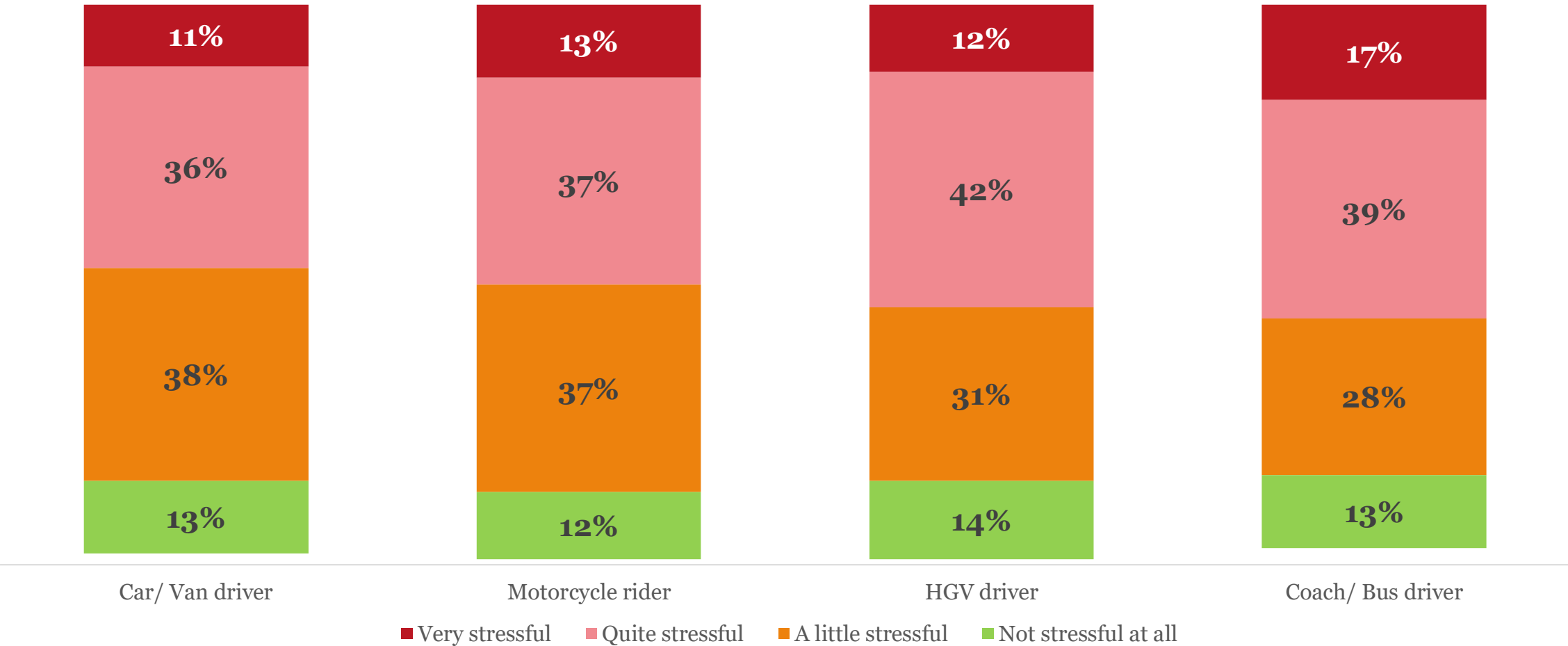


How stressful driving can be



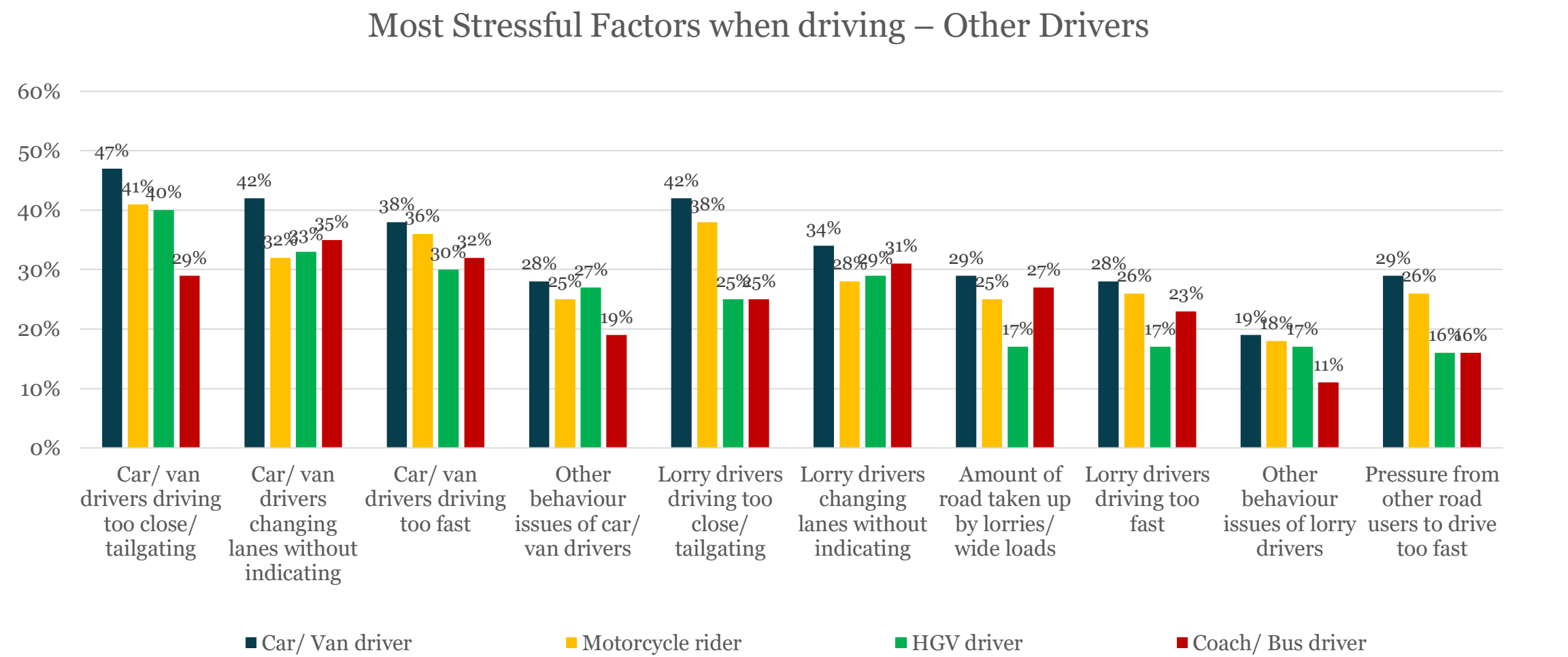
Overall 1 in 10 car and van drivers find it very stressful driving on the SRN (this rises to almost 1 in 5 coach and bus drivers)

Stressfulness of Driving on England’s Motorways & Major ‘A’ Roads



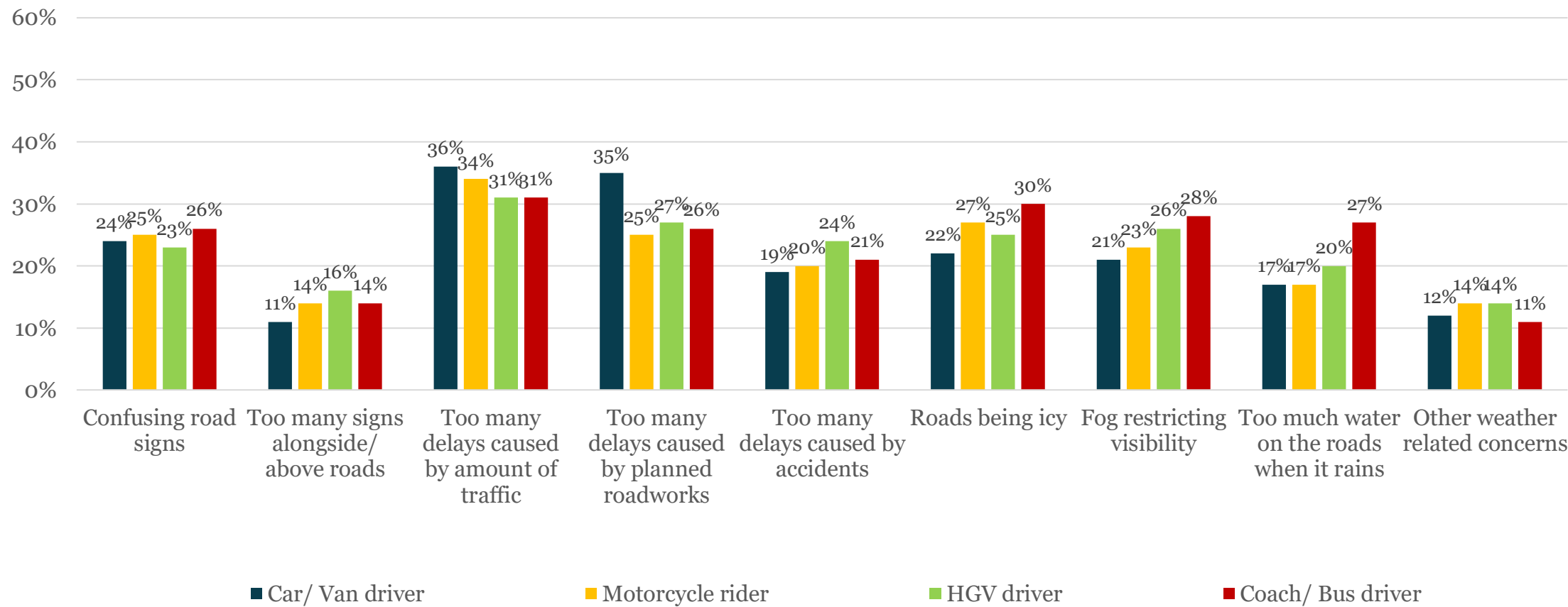
46 Q41. Overall how stressful do you think it is driving on England’s motorways and major ‘A’ roads?
Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)

Most stressful factors when driving on England’s motorways and major ‘A’ roads

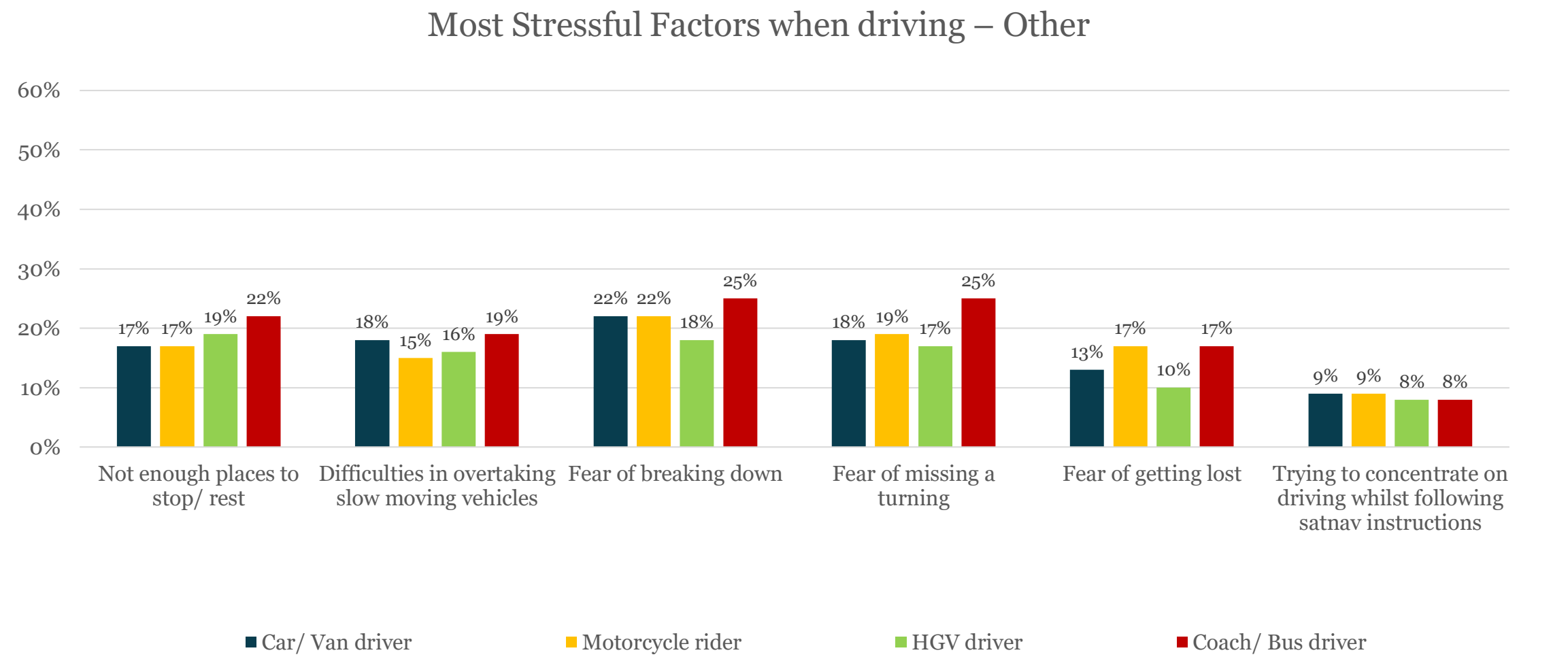


Most stressful factors when driving on England’s motorways and major ‘A’ roads (cont.)

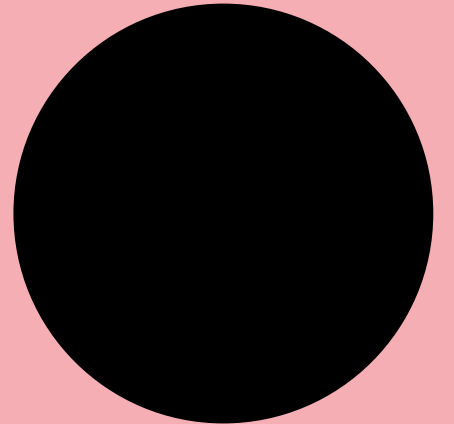
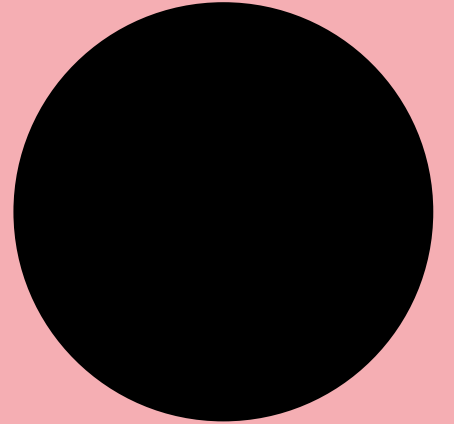
Most Stressful Factors when driving – Signs, Delays & Weather



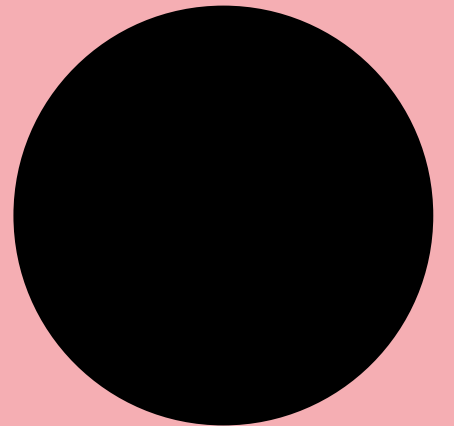
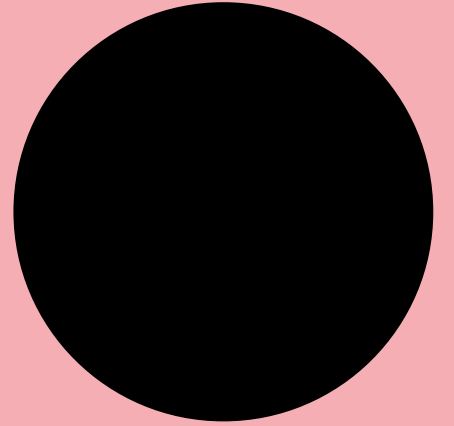
Most stressful factors when driving on England’s motorways and major ‘A’ roads (cont.)



Appendix

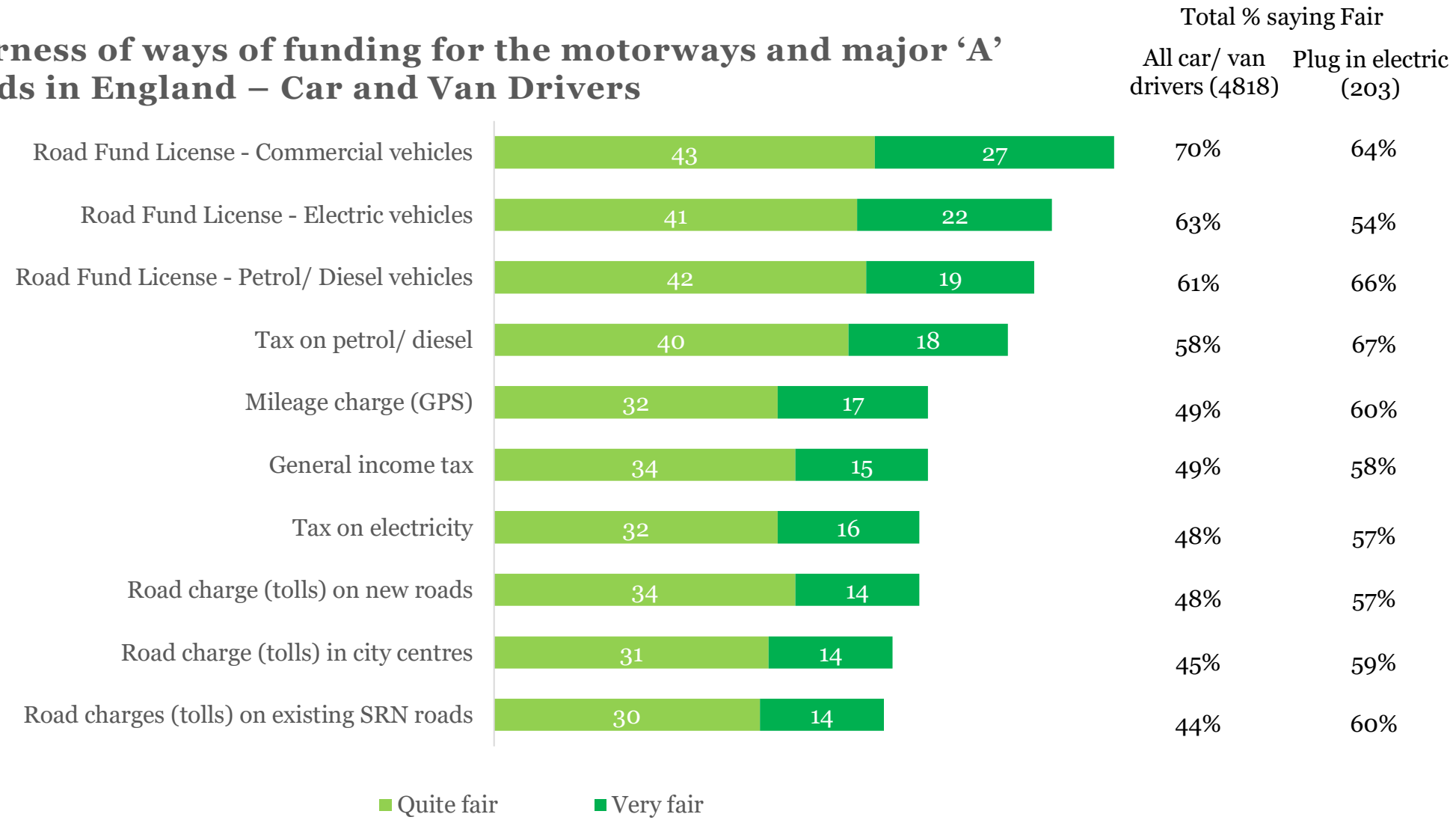


Funding the SRN



Road fund licenses are seen as the fairest way of funding the SRN (although the preference is for drivers of vehicles other than the ones they drive!) – Tolls tend to have least appeal for non-electric car/ van drivers

Fairness of ways of funding for the motorways and major ‘A’ roads in England – Car and Van Drivers



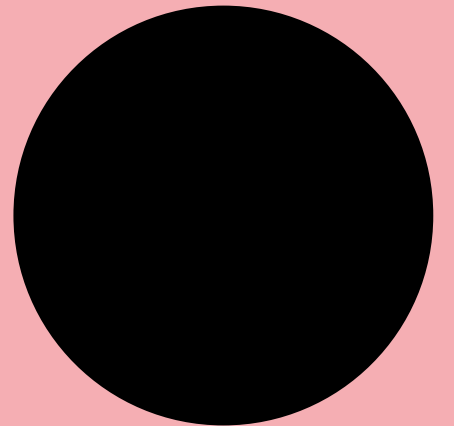
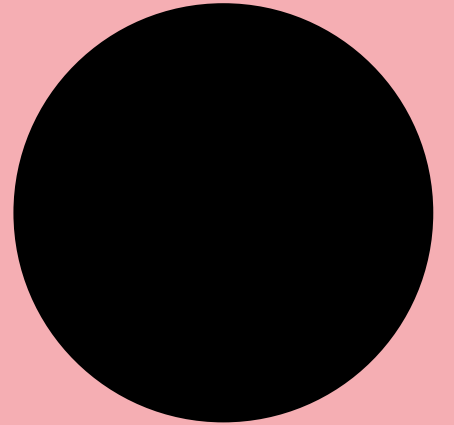
Fairness of funding for the motorways and major 'A' roads in England

In terms of the perceived fairness of various funding mechanics, there is little difference between different types of road users – this is perhaps not surprising given that many commercial drivers/ motorbike riders are also car owners/ drivers.

It is worth noting, however, that commercial drivers are less resistant overall to road charging/ tolls and overall mileage charges (could experience of this in other countries be impacting here?).

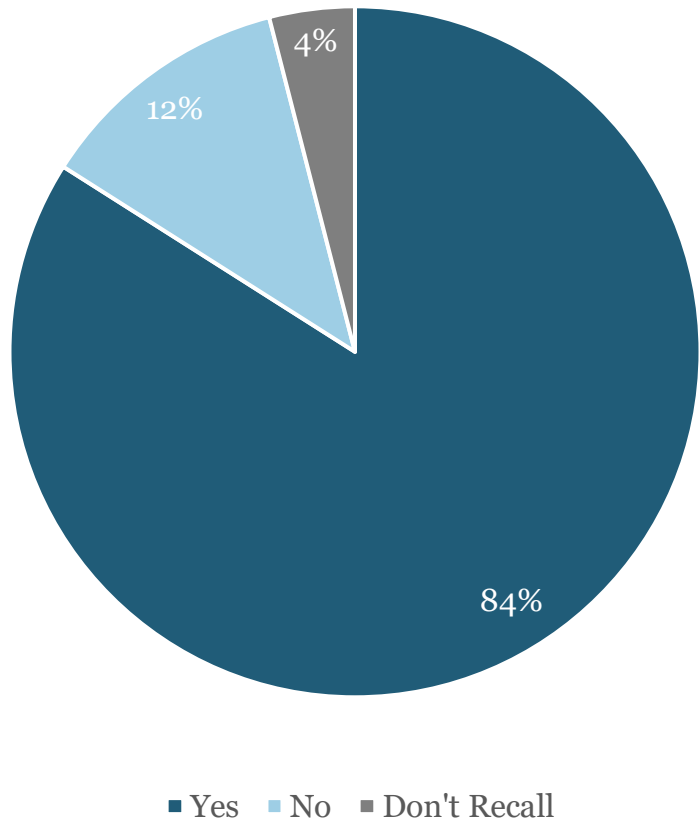
Potentially linked to reducing traffic on other routes they use, coach and bus drivers are more likely than other drivers to support city centre charging.

Perceptions of Highways England

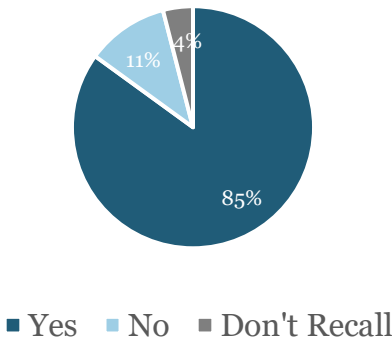


84% of respondents are aware of Highways England (motorcycle/ moped riders and coach/ bus drivers have slightly lower awareness levels)

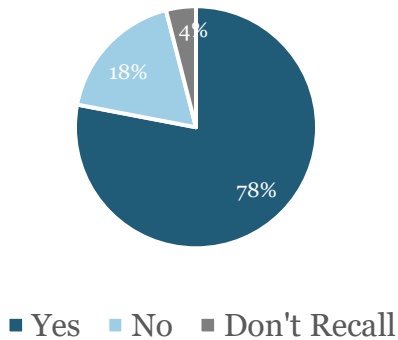
Aware of Highways England – Overall



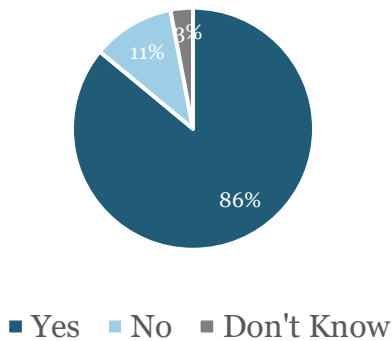
Car/Van Drivers



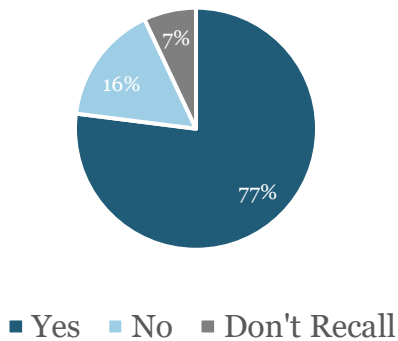
Motorcycle Riders



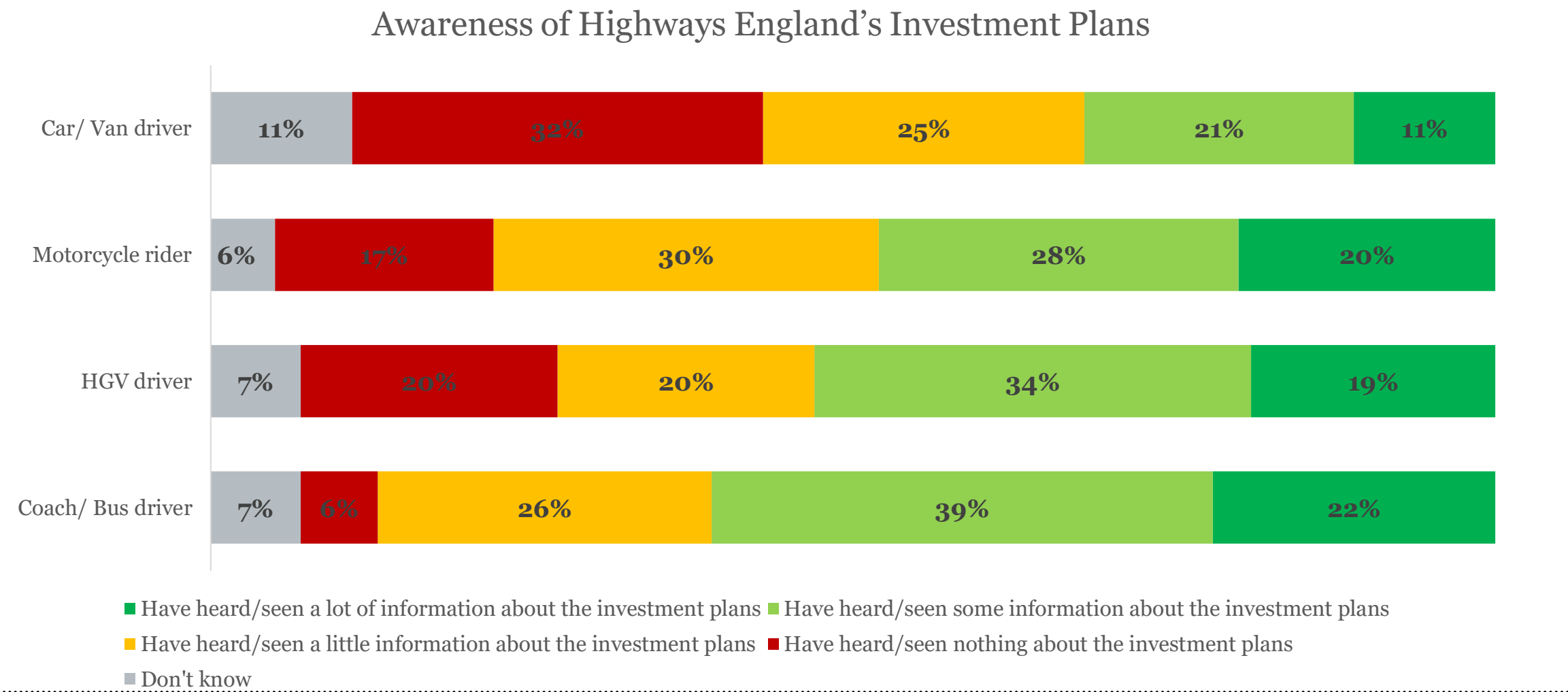
HGV Drivers



Bus/Coach Drivers

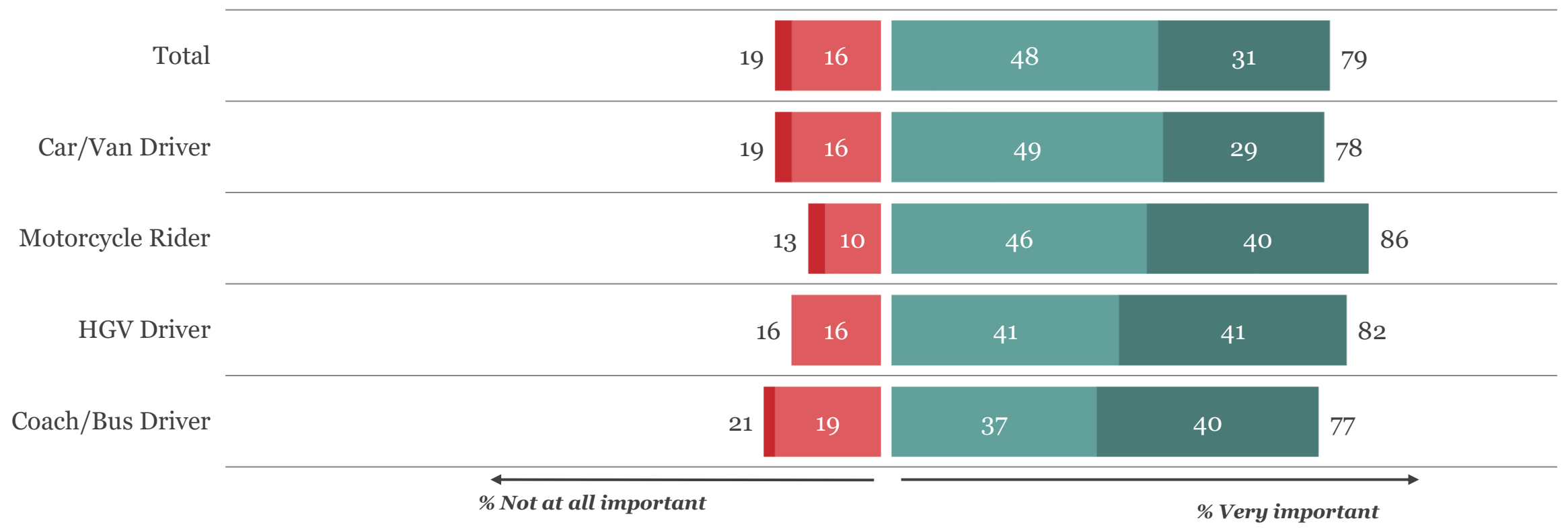


Whilst the majority of car/ van drivers who are aware of Highways England have heard/seen little or no information on their investment plans, HGV/ LGV and coach/ bus drivers are more likely to have heard/ seen slightly more



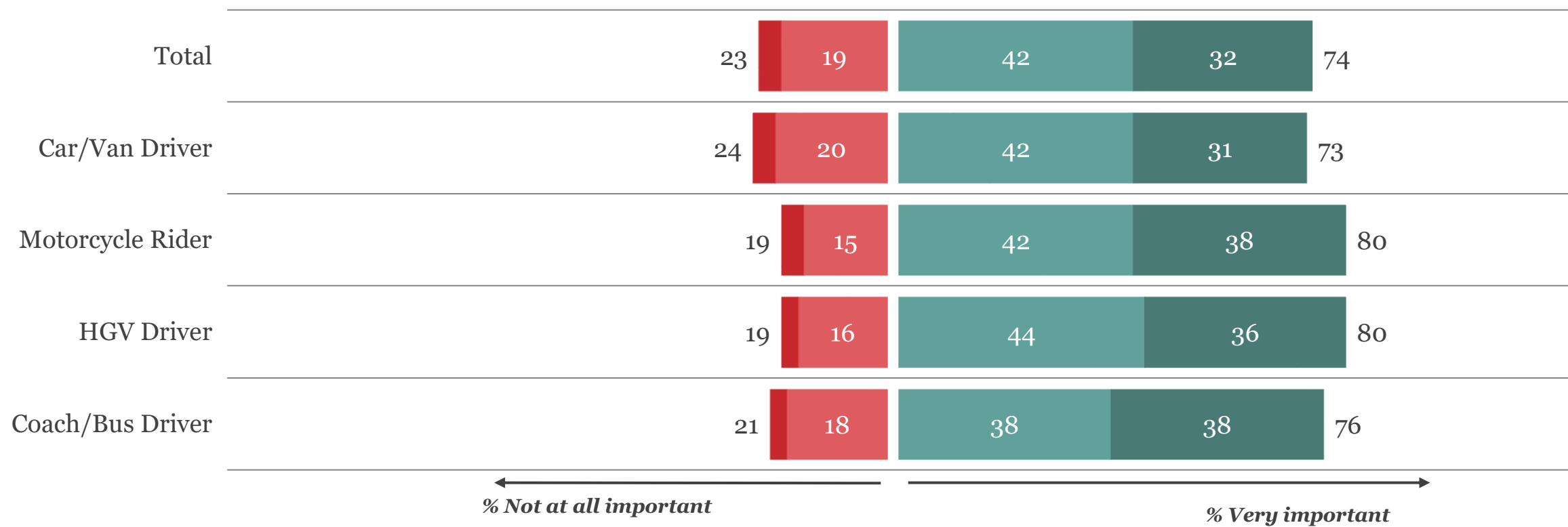
Motorcyclists are the group most likely to feel it is important to have greater awareness of Highways England’s responsibilities

Greater awareness of what Highways England is responsible for

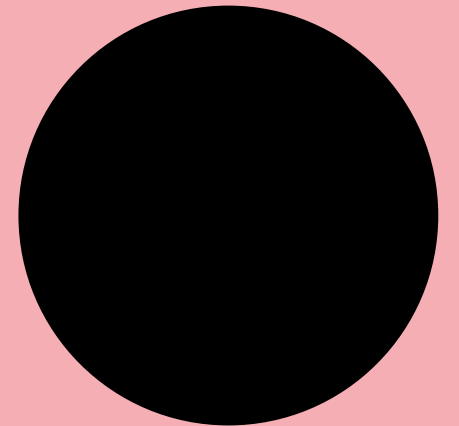
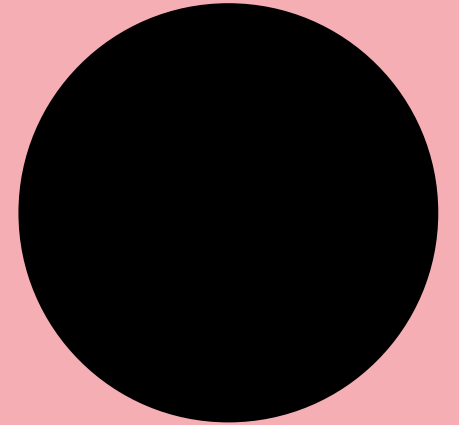


Three-quarters of all respondents feel it would be important to know how to contact Highways England, motorcyclists and HGV/ LGV drivers being most likely to say it is important

Knowing how to contact Highways England

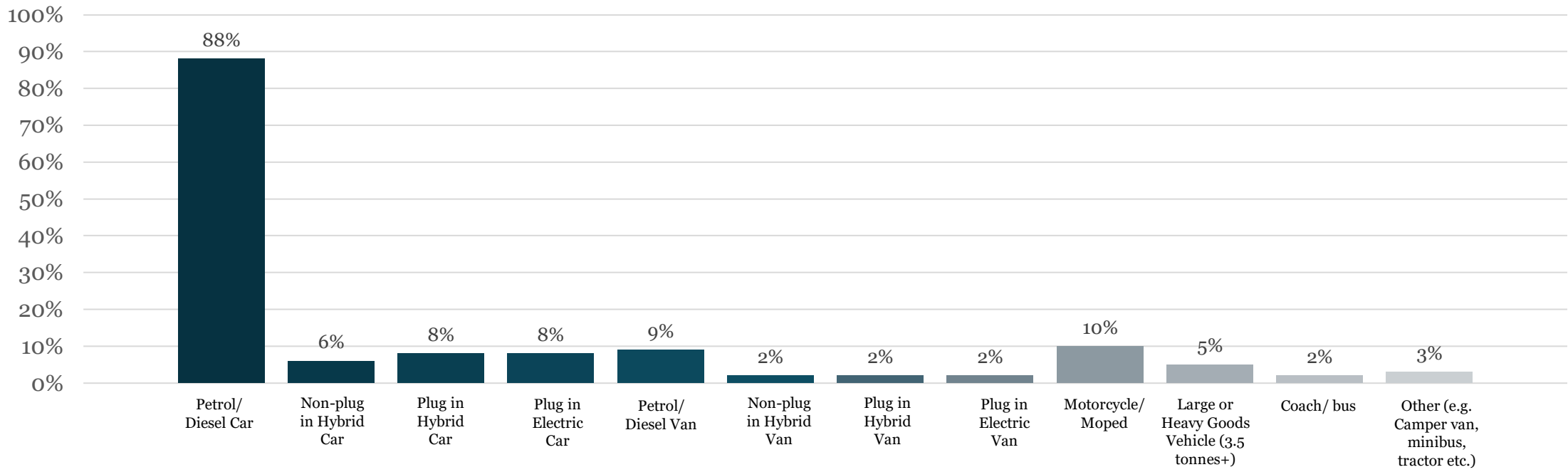


Other findings/ data



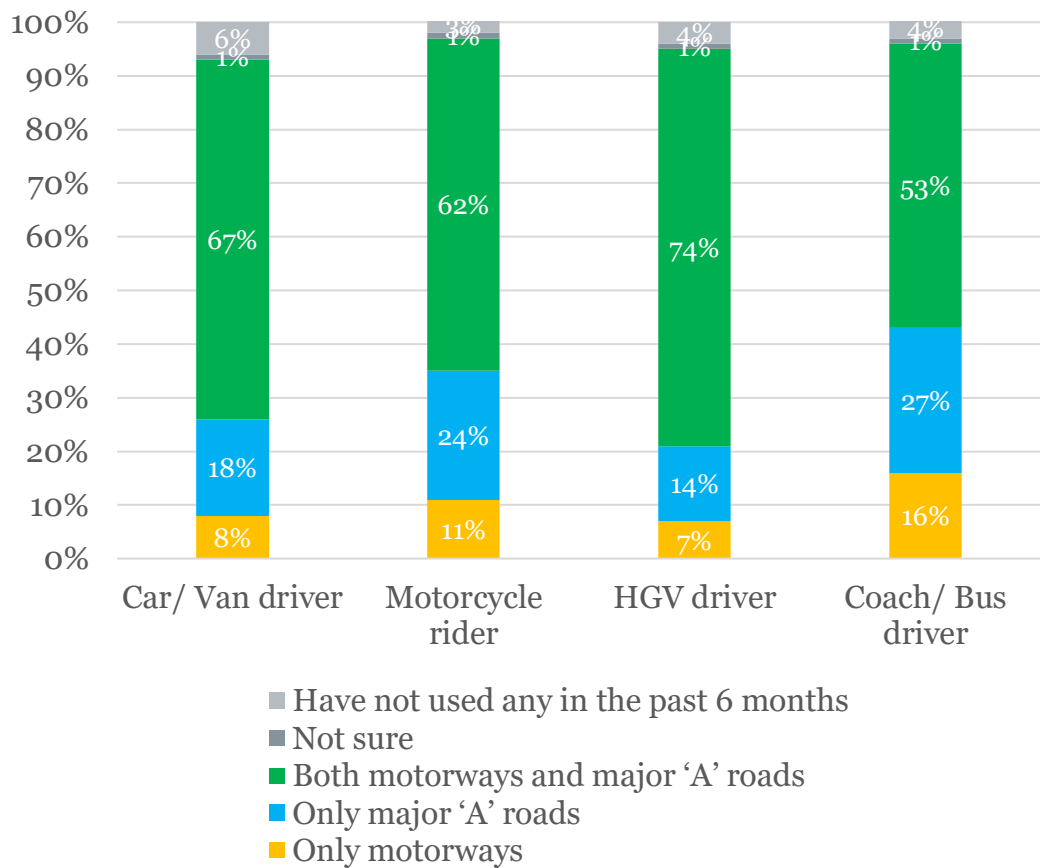
88% of respondents currently drive a petrol or diesel car

Type of Vehicles Driven

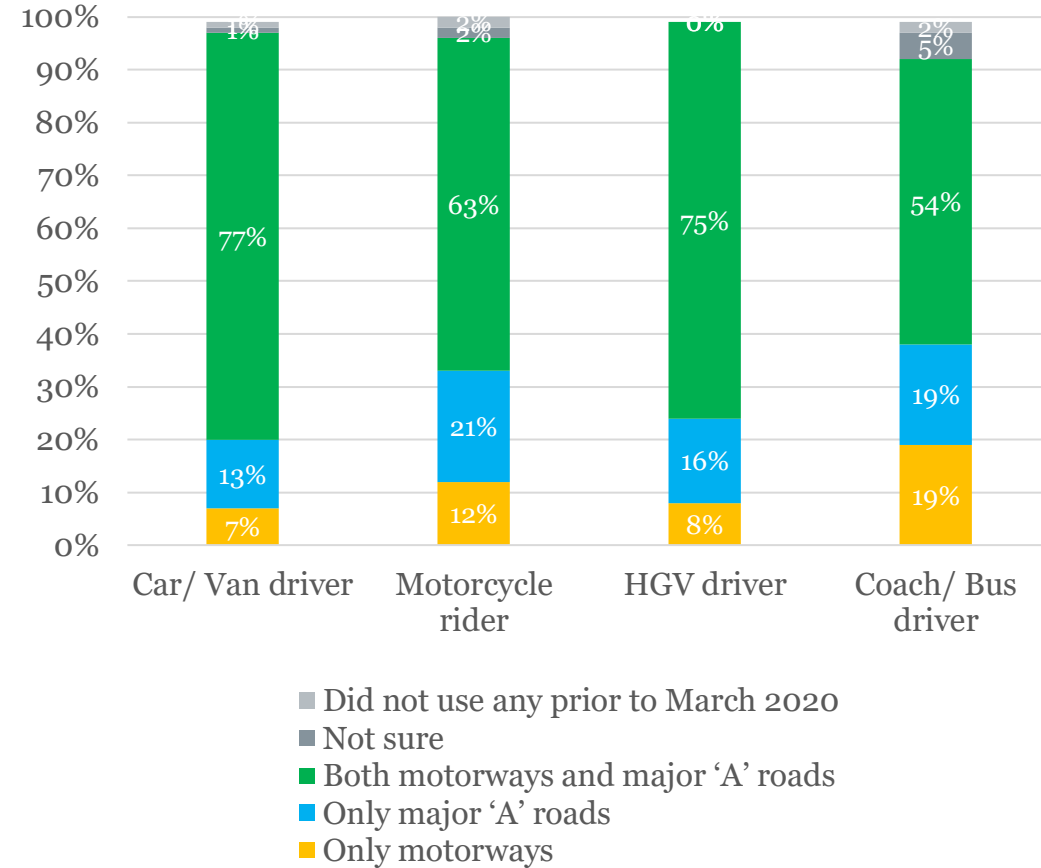


Motorcyclists and coach/ bus drivers are the most likely users to only use ‘A’ roads and not travel on motorways

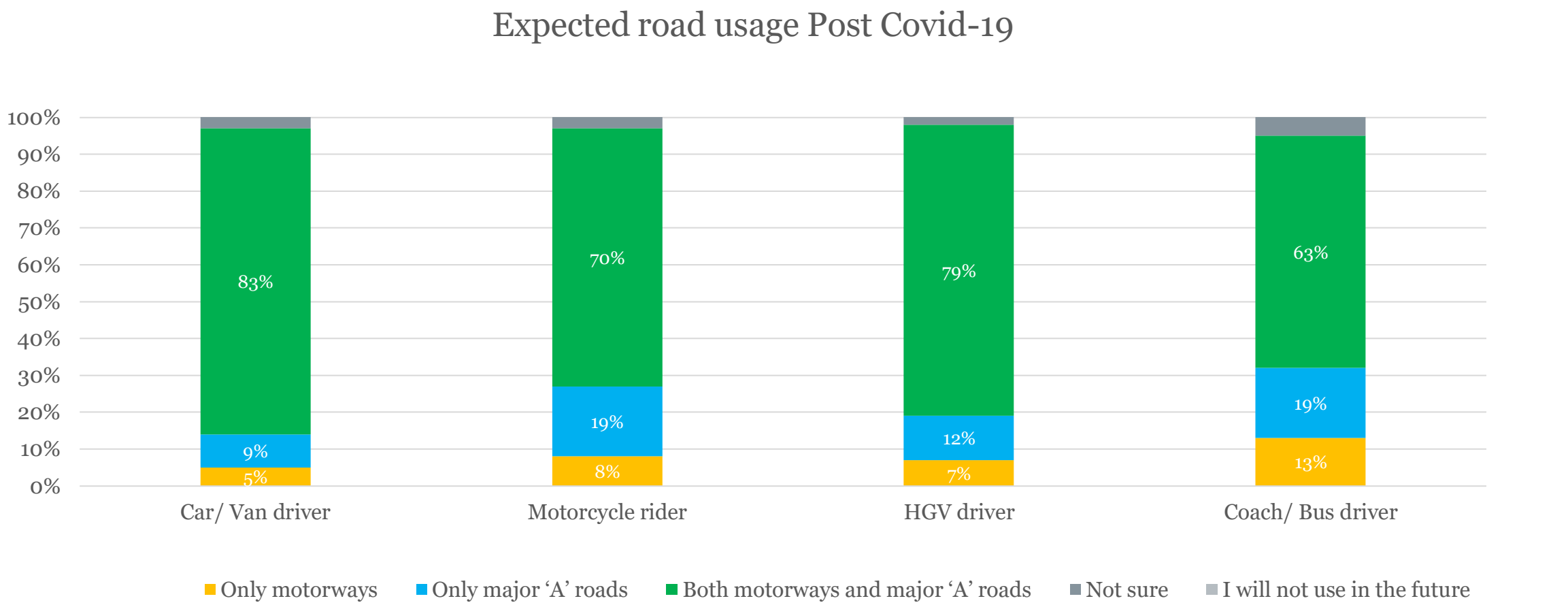
Roads used in the last six months



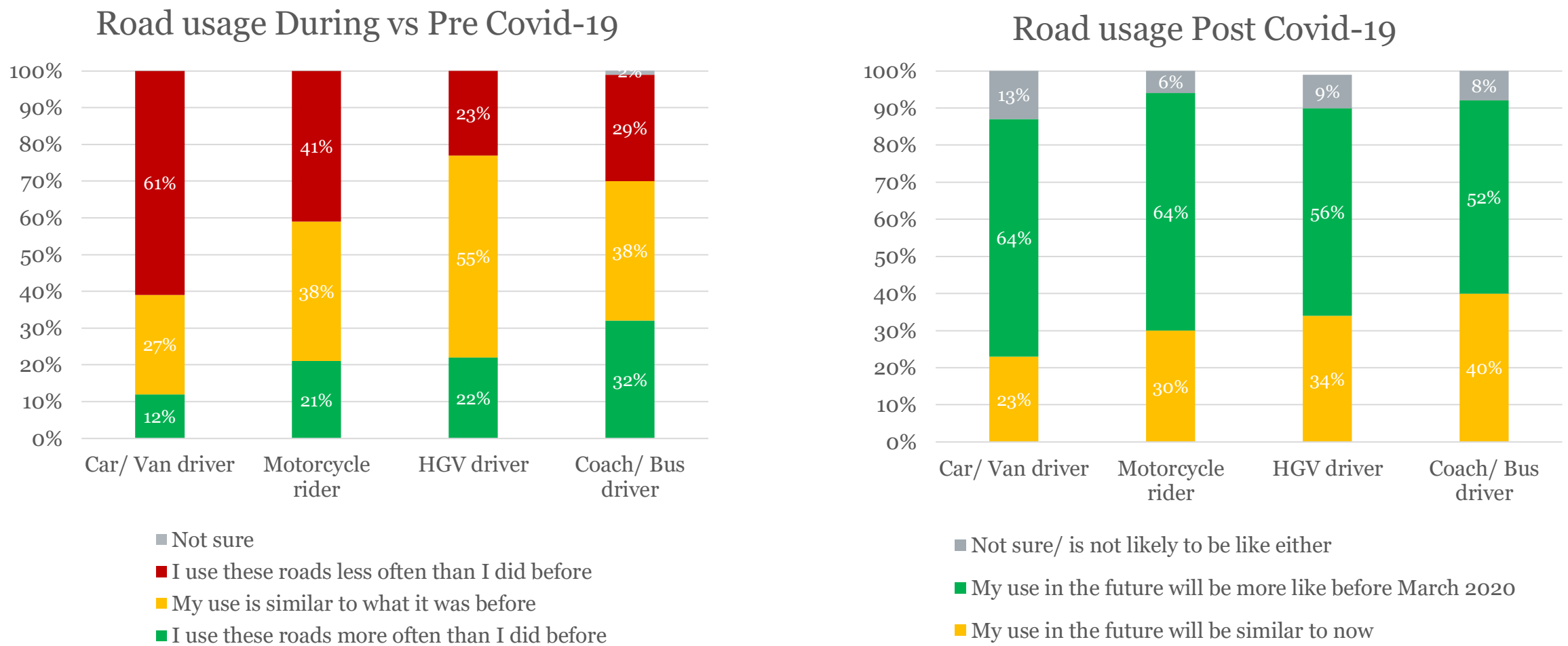
Roads used regularly Pre Covid-19



The vast majority of drivers expect to use both major ‘A’ roads and motorways after Covid-19 restrictions are lifted

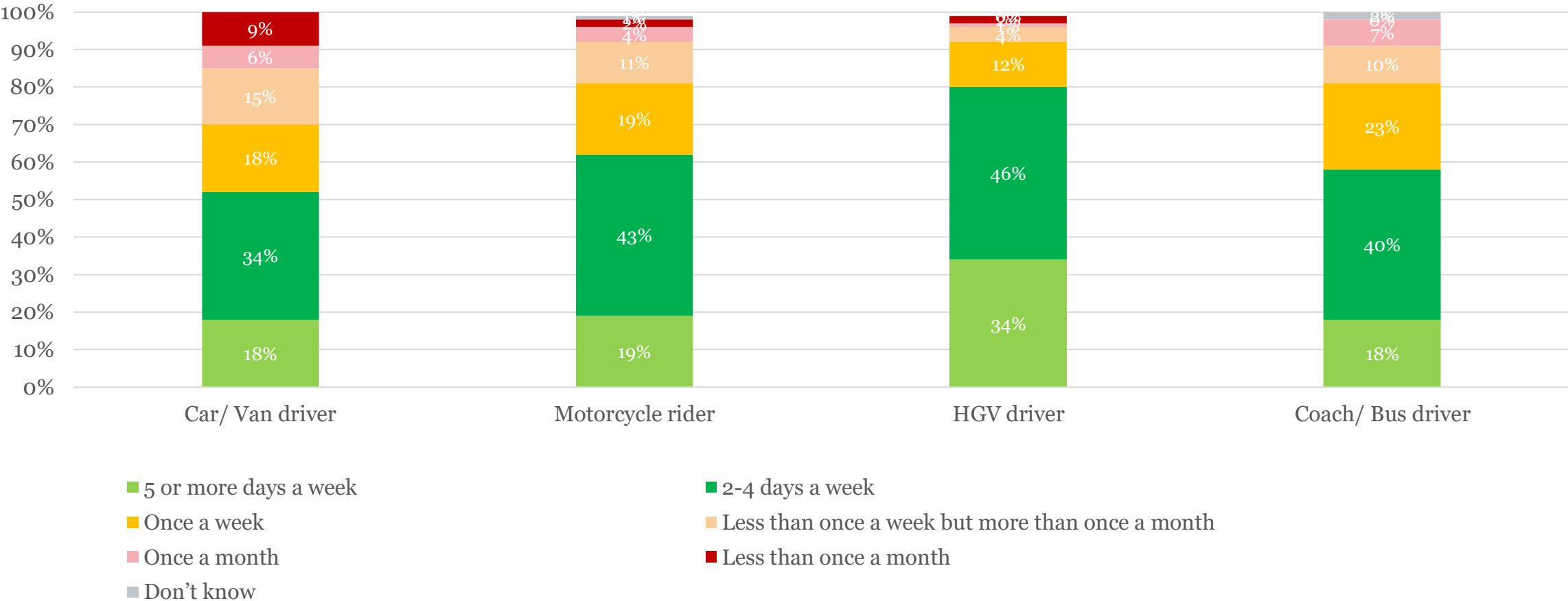


Whilst most car/ van drivers have used the SRN less than they did pre Covid-19 this is not true for all users (39% either using as they did before or more often). Almost two-thirds expect their future usage to be more like their pre-Covid usage than now



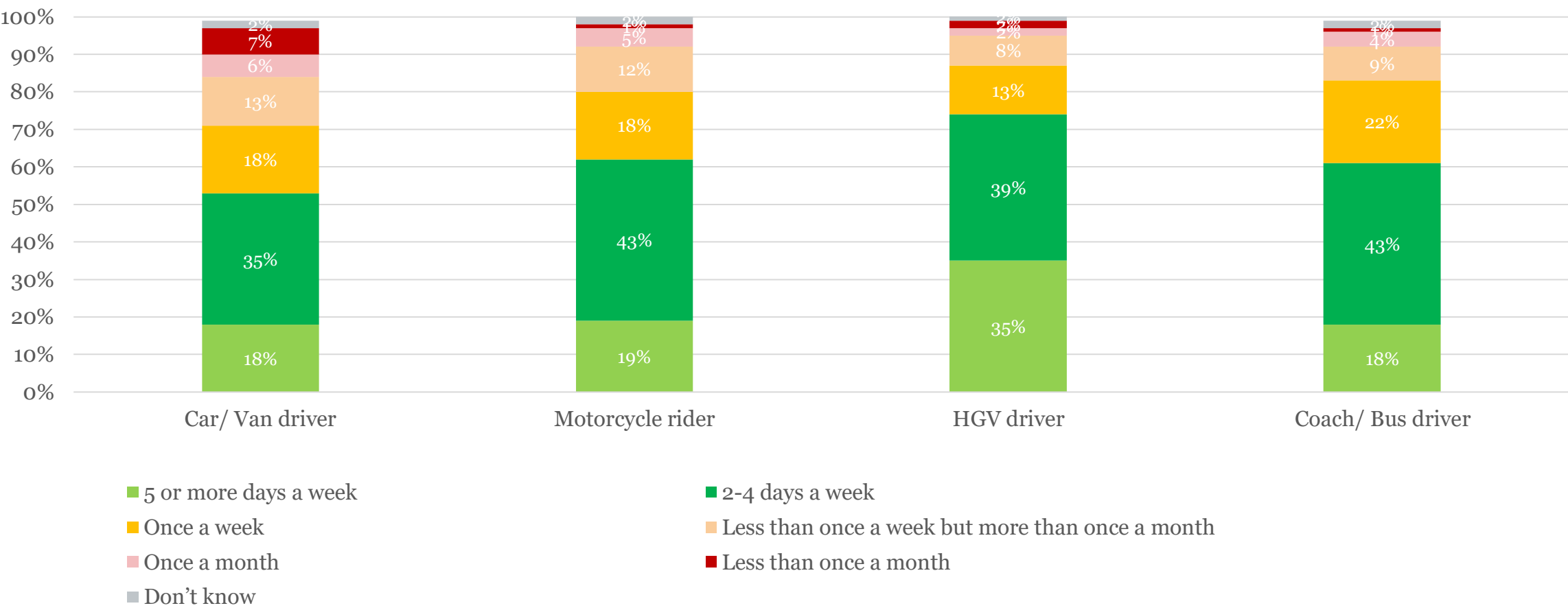
When respondents do use the SRN under ‘normal’ circumstances, the majority do tend to make at least two journeys a week (almost one in five using at least 5 times a week – rising to over a third of HGV/LGV drivers)

Frequency of Travel



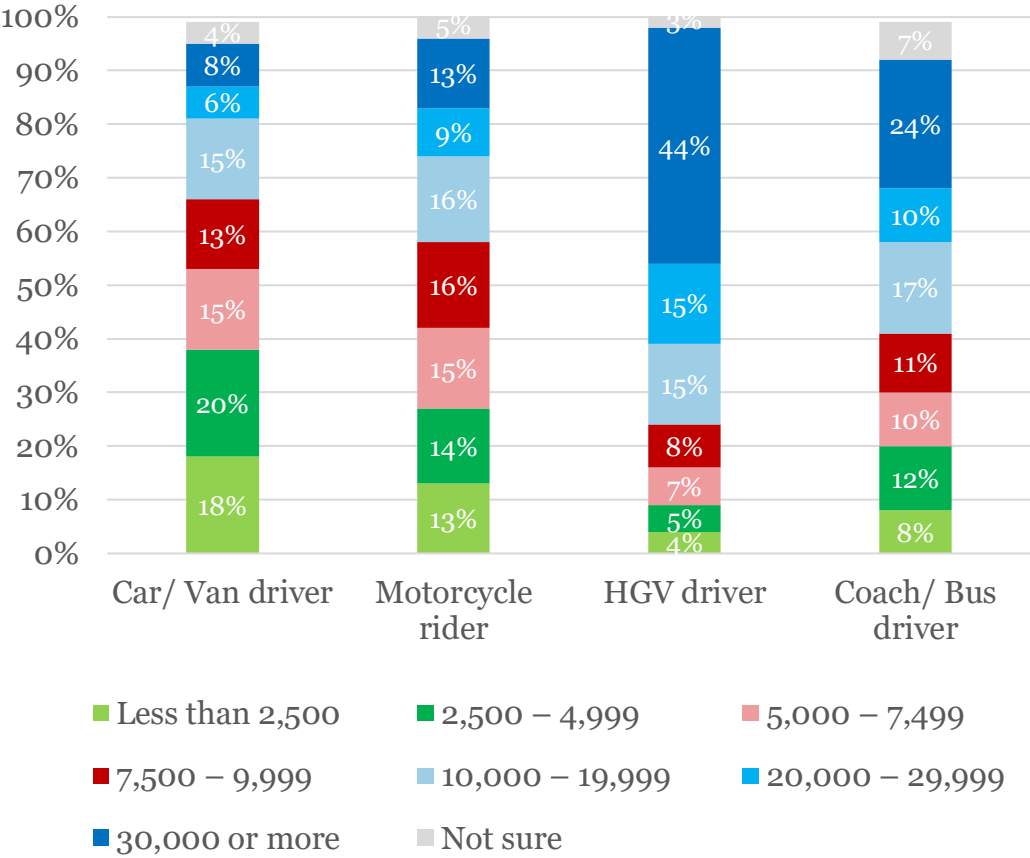
Expected frequency of travelling on the SRN post Covid-19 restrictions is very similar to the usage under normal circumstances

Expected Frequency of Travel

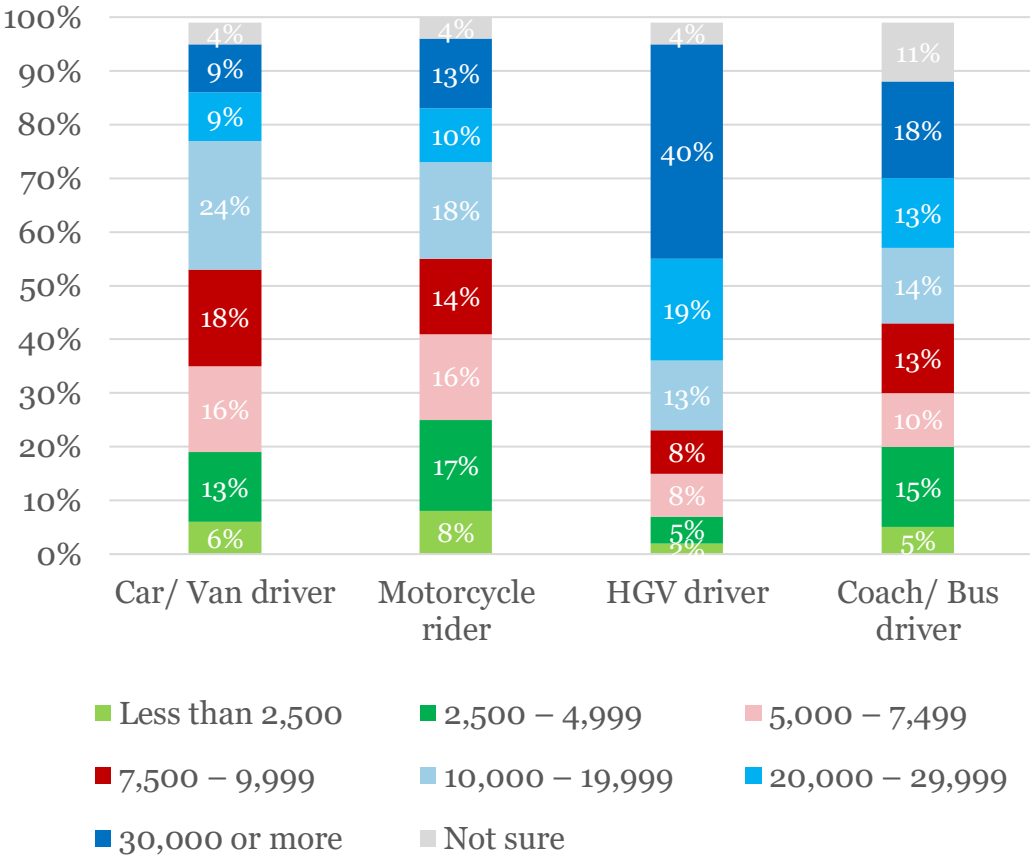


Estimates of annual mileage show the decrease in road usage over the past 12 months for all groups except HGV/LGV drivers

Mileage in the Last 12 Months

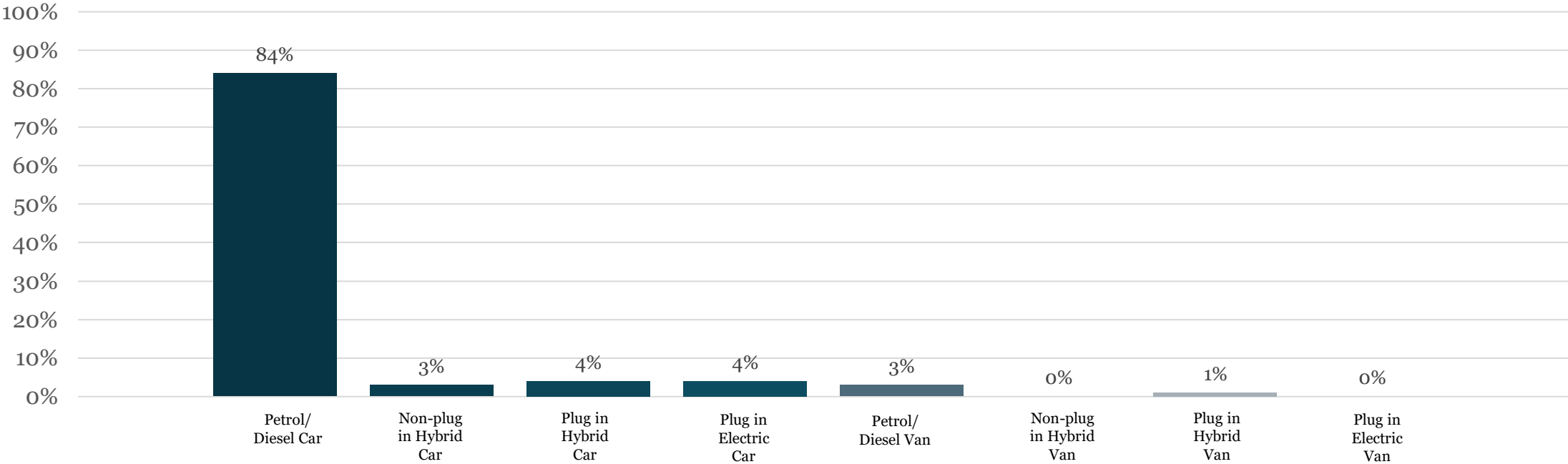


Mileage Pre Covid-19

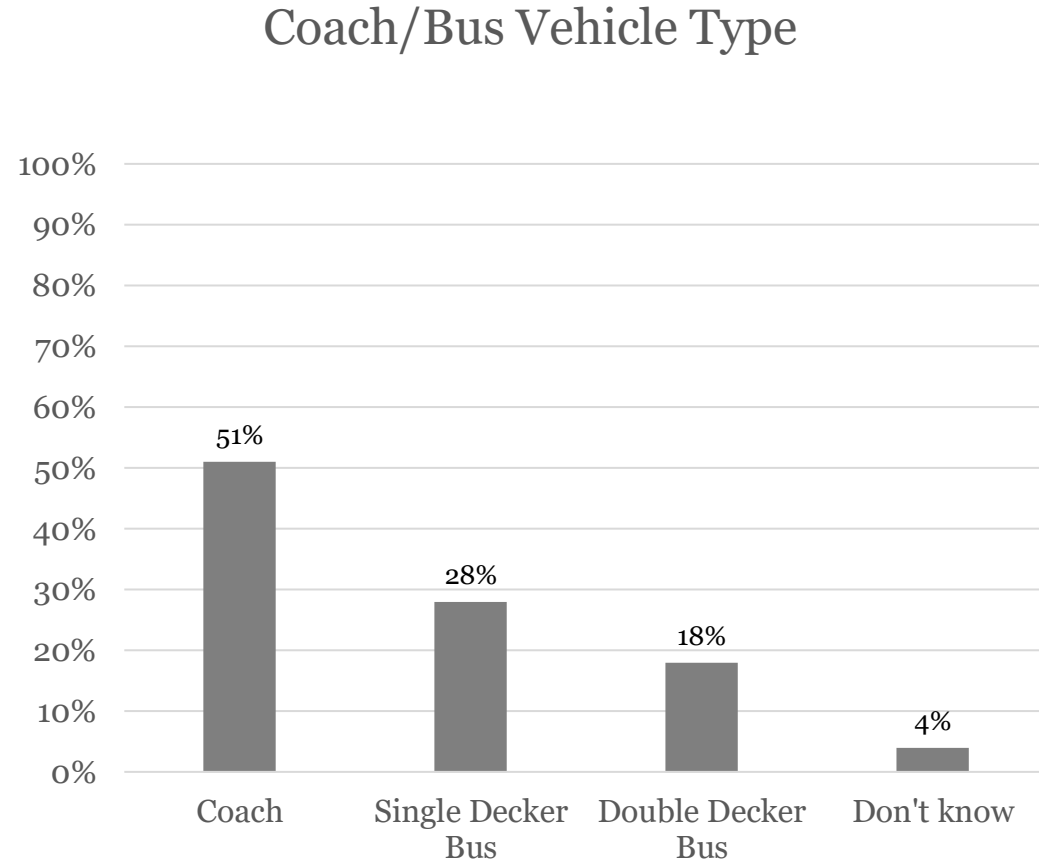
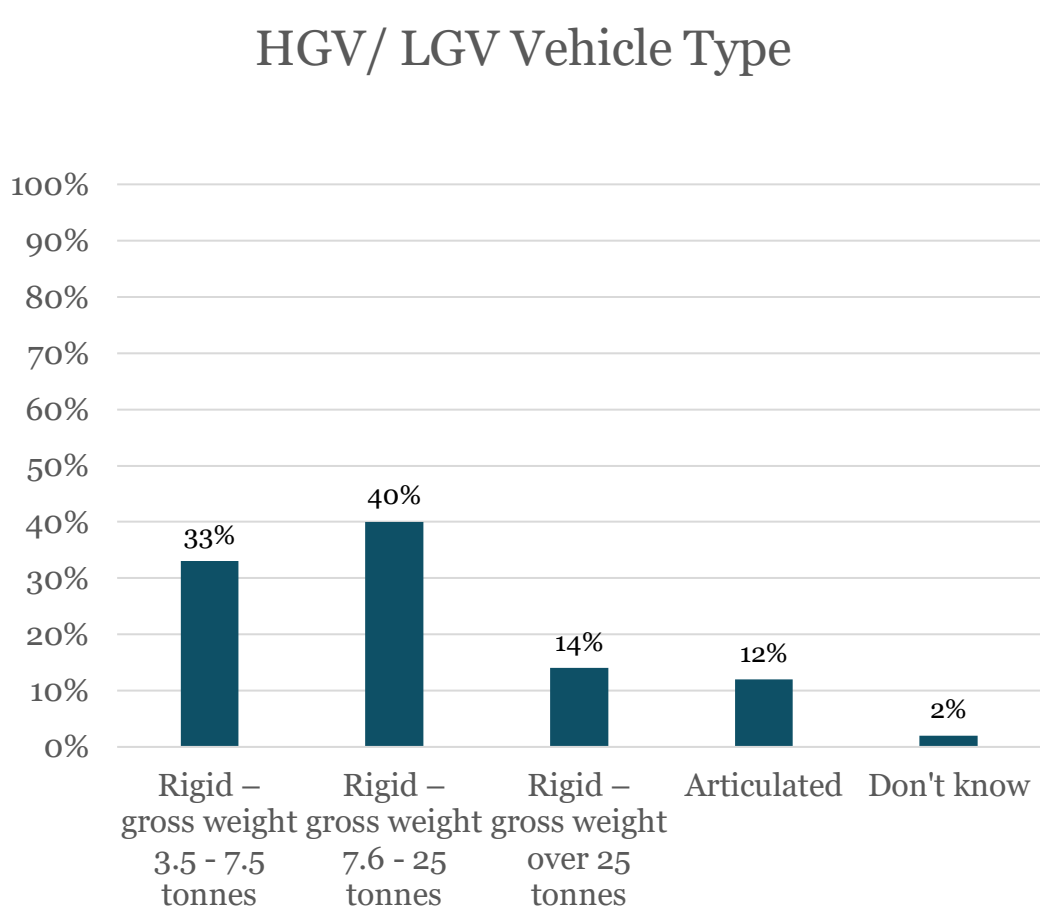


Type of car/ van used for a typical journey on the SRN

Type of Vehicles Expected to use

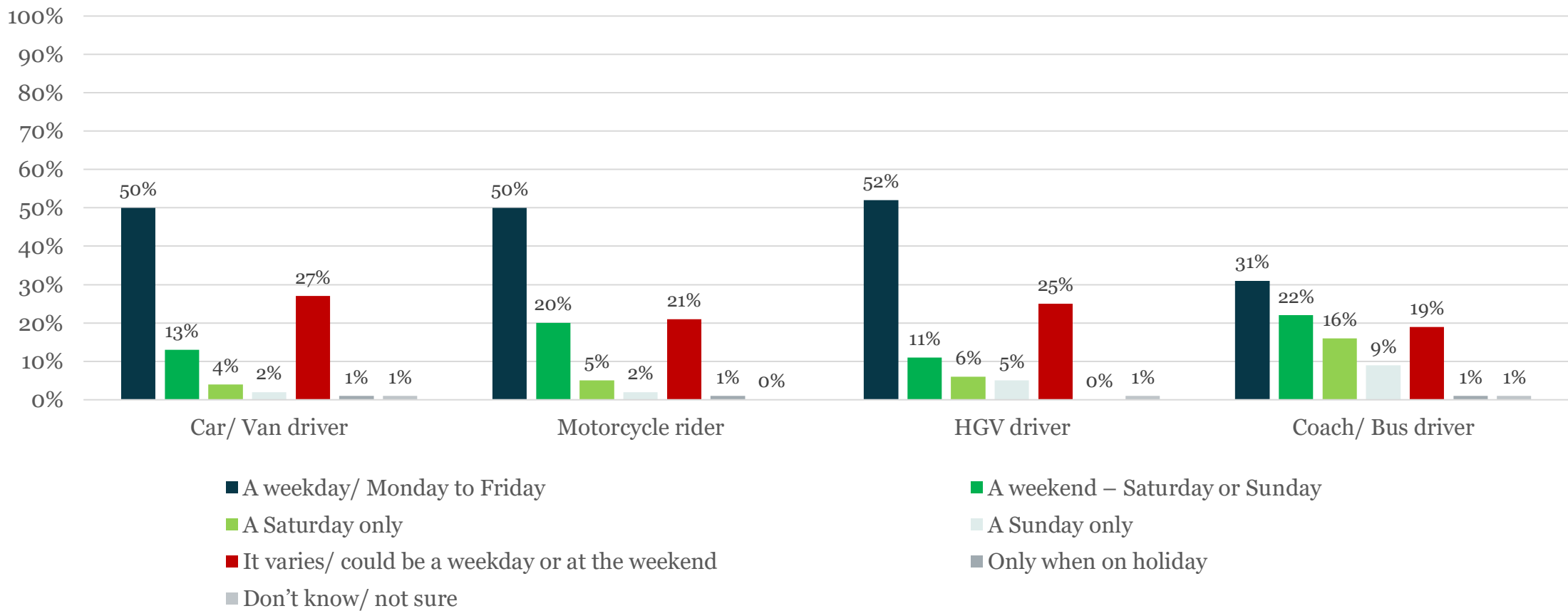


Only about a quarter of HGV/ LGV drivers drive vehicles over 25 tonnes or articulated lorries. 51% of our coach/ bus sample were coach drivers.

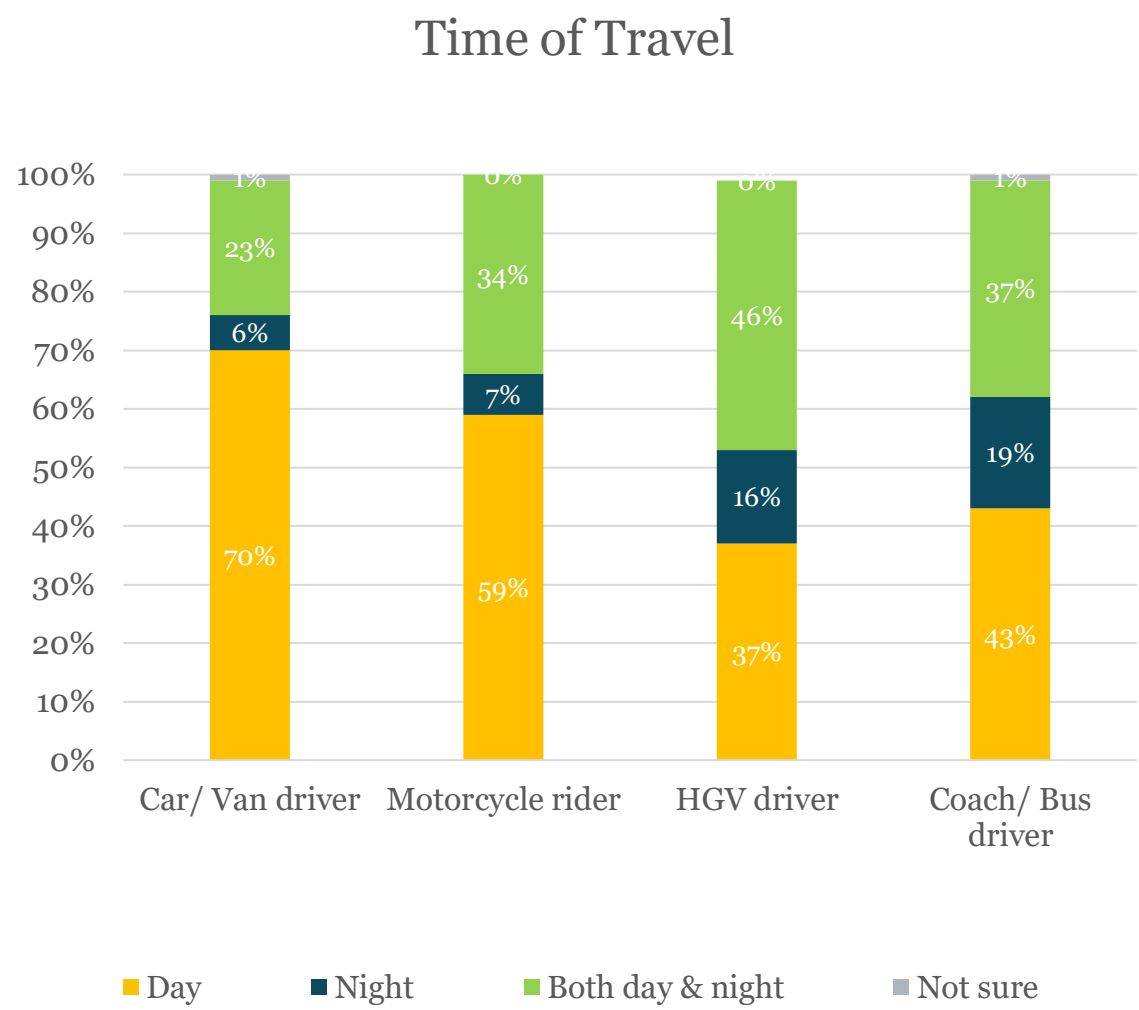


Usage of the SRN across most groups is either on a weekday or varied across days of the week except for coach/ bus drivers who are more likely to drive most at weekends (or specifically on Saturdays or Sundays)

Day of the Week for Typical Journey



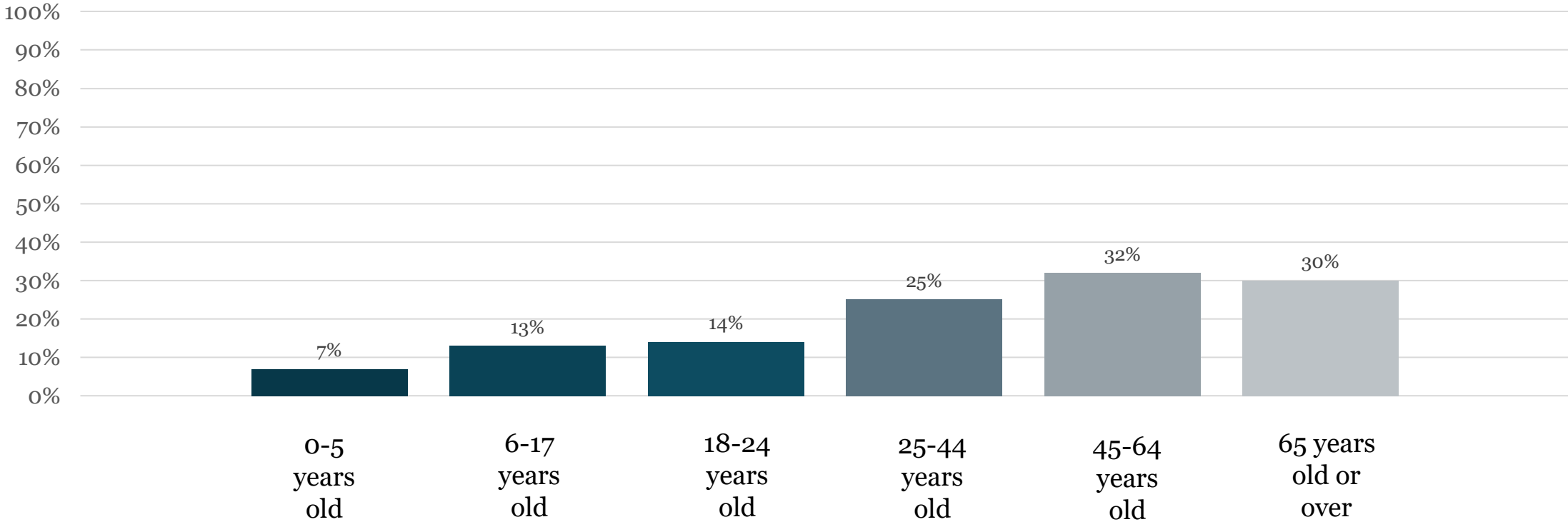
70% of car/ van drivers only use the SRN during daylight.



Most accompanied journeys are with other adults

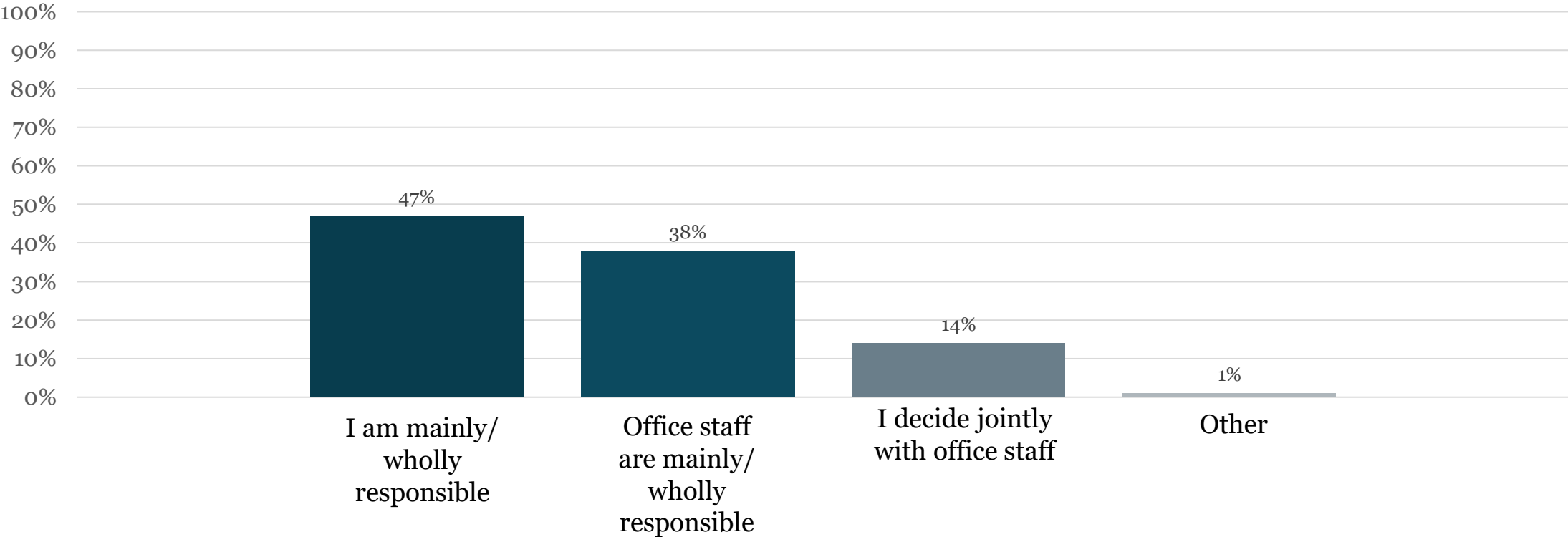
40% of car/ van drivers said they were usually accompanied by someone else when travelling on the SRN

Ages of those Travelled With

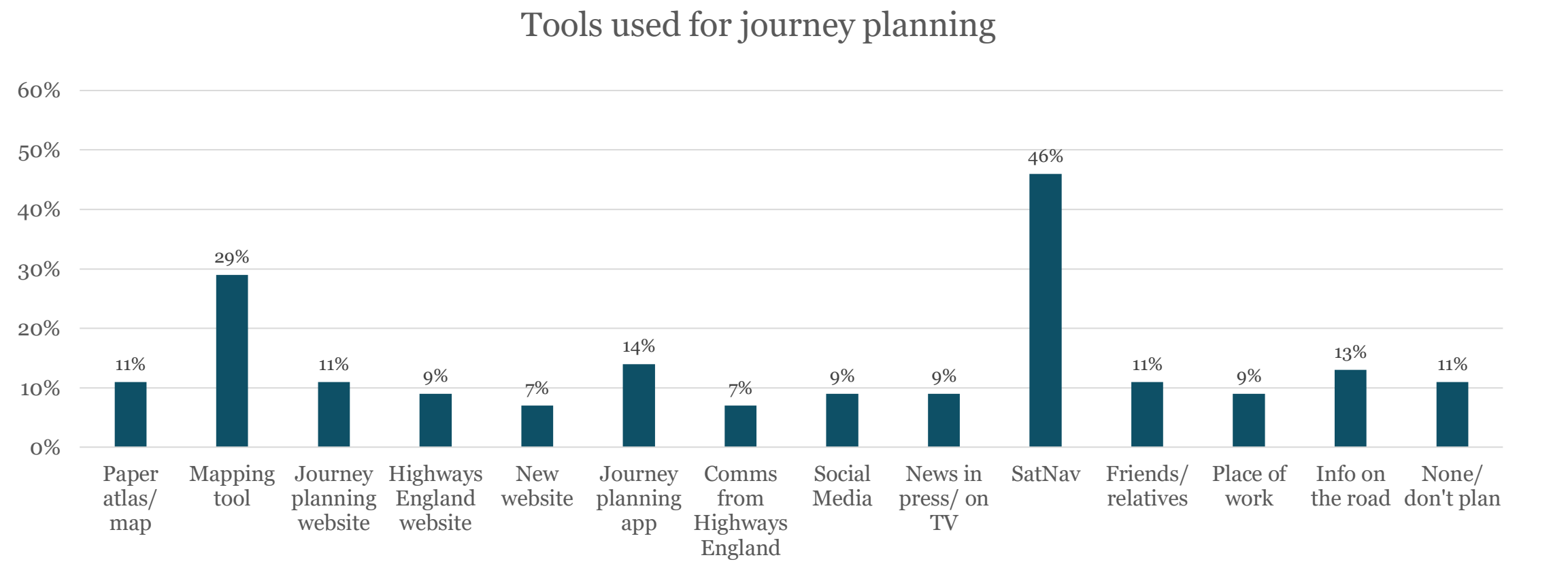


Most HGV/ LGV drivers are at least jointly responsible for planning their journeys (although over a third are reliant on other people)

Responsibility for Journey Planning

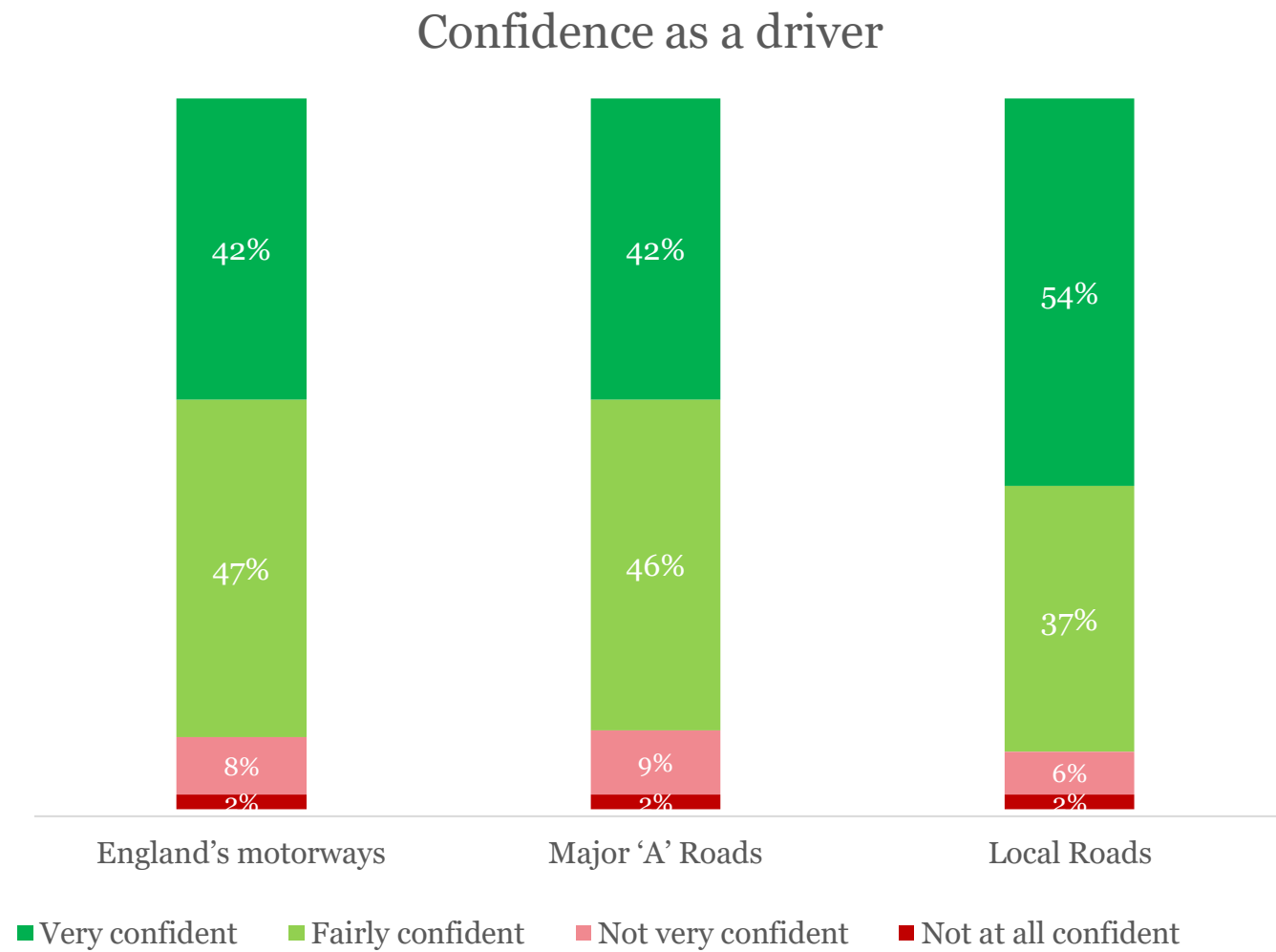


SatNav and online Mapping tools are the most frequently used tools for journey planning on the SRN

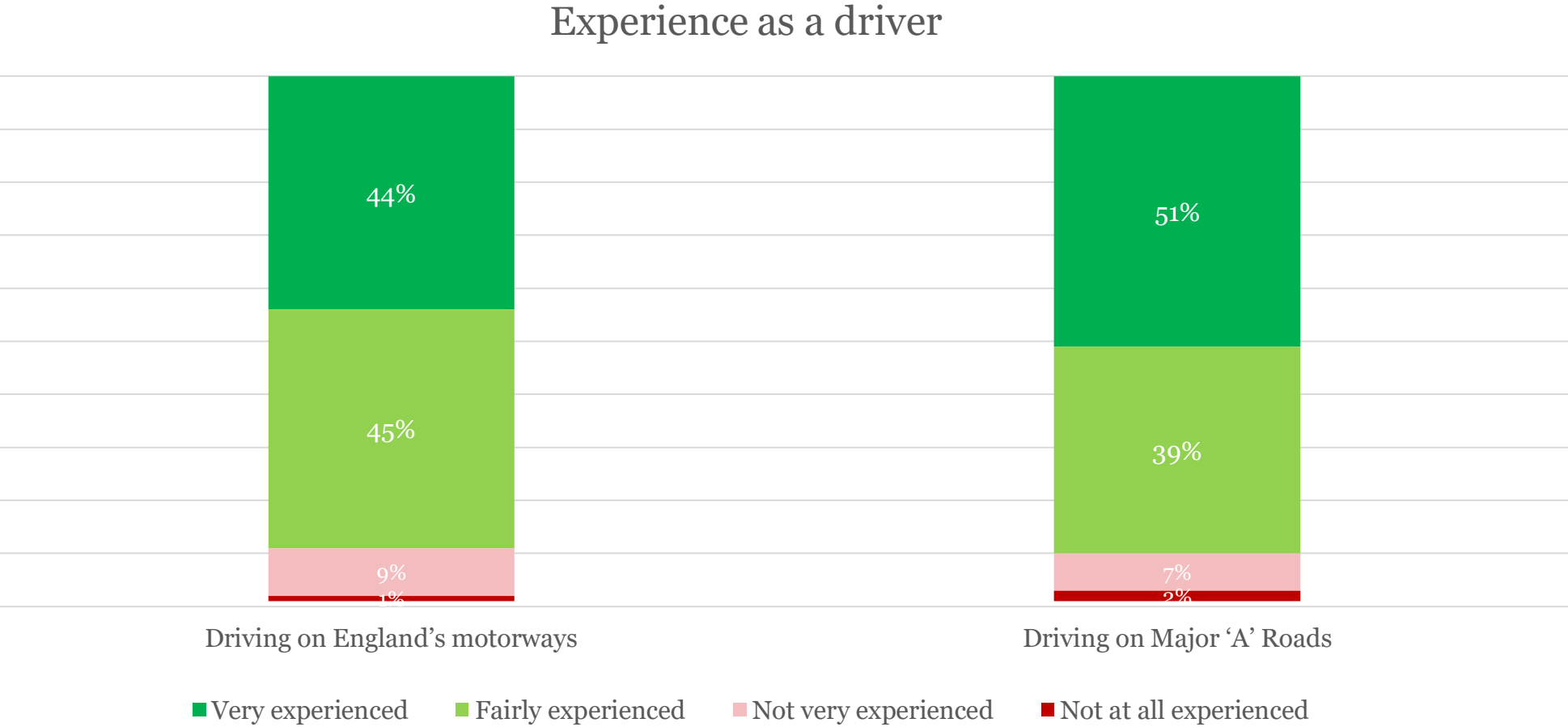


HGV/ LGV drivers are the group most likely to use the Highways England website (24%) whilst Coach/ Bus drivers use a greater variety of tools.

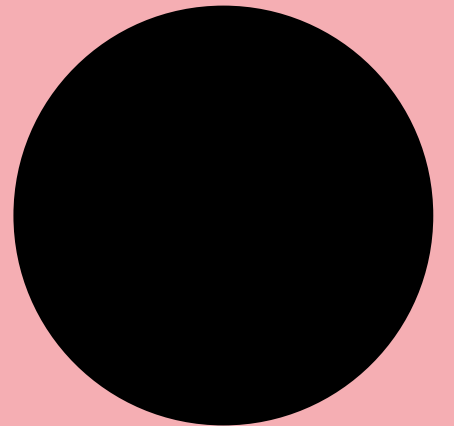
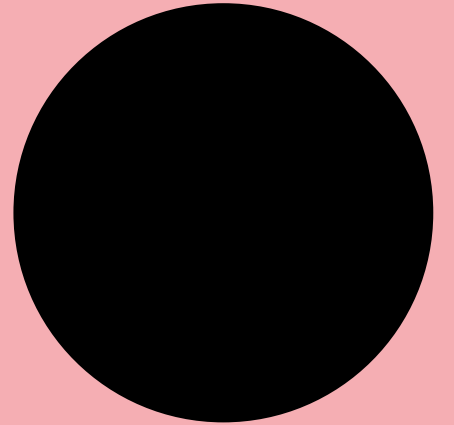
Whilst most drivers are at least fairly confident on all roads, they tend to be slightly more confident on local roads as opposed to the SRN



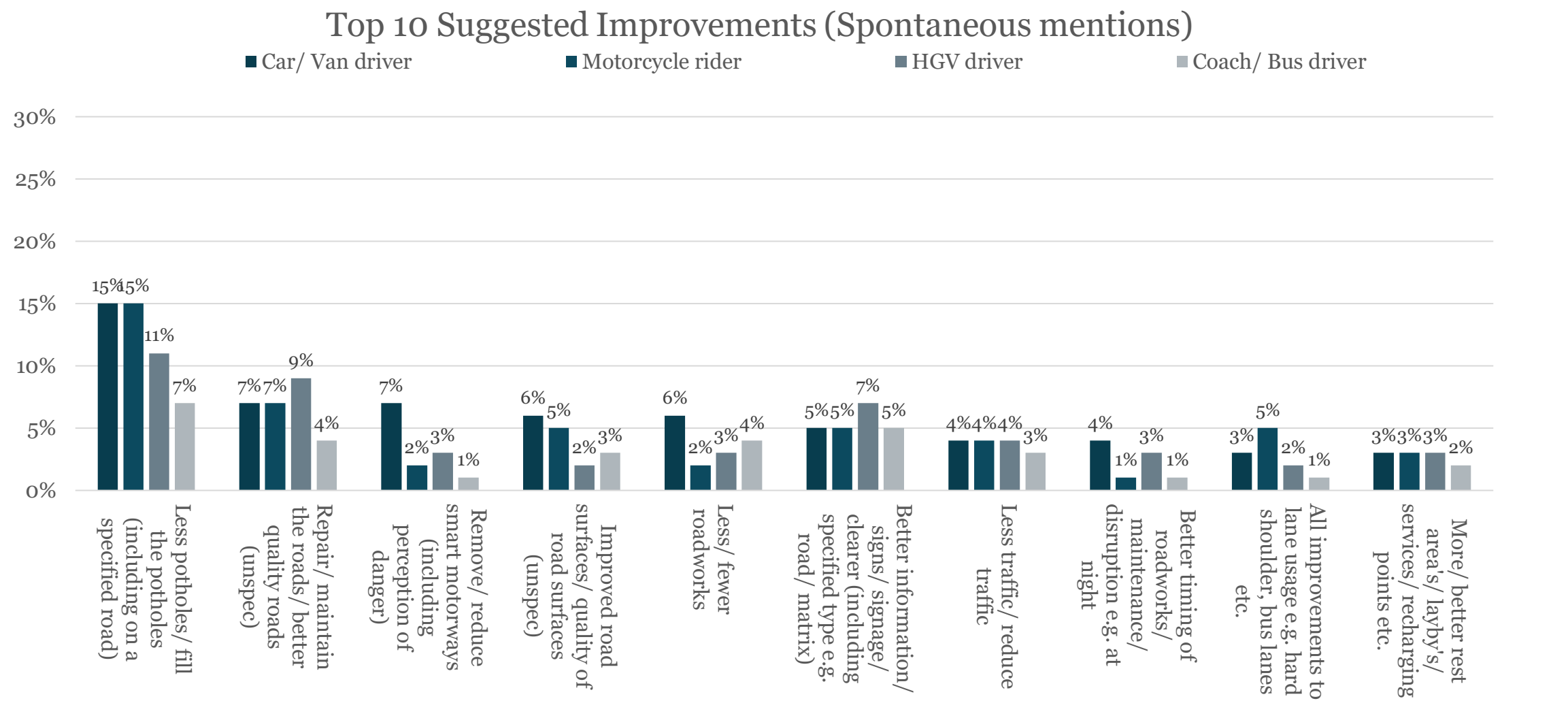
Drivers are more likely to say they are very experienced at driving on Major 'A' roads than on motorways



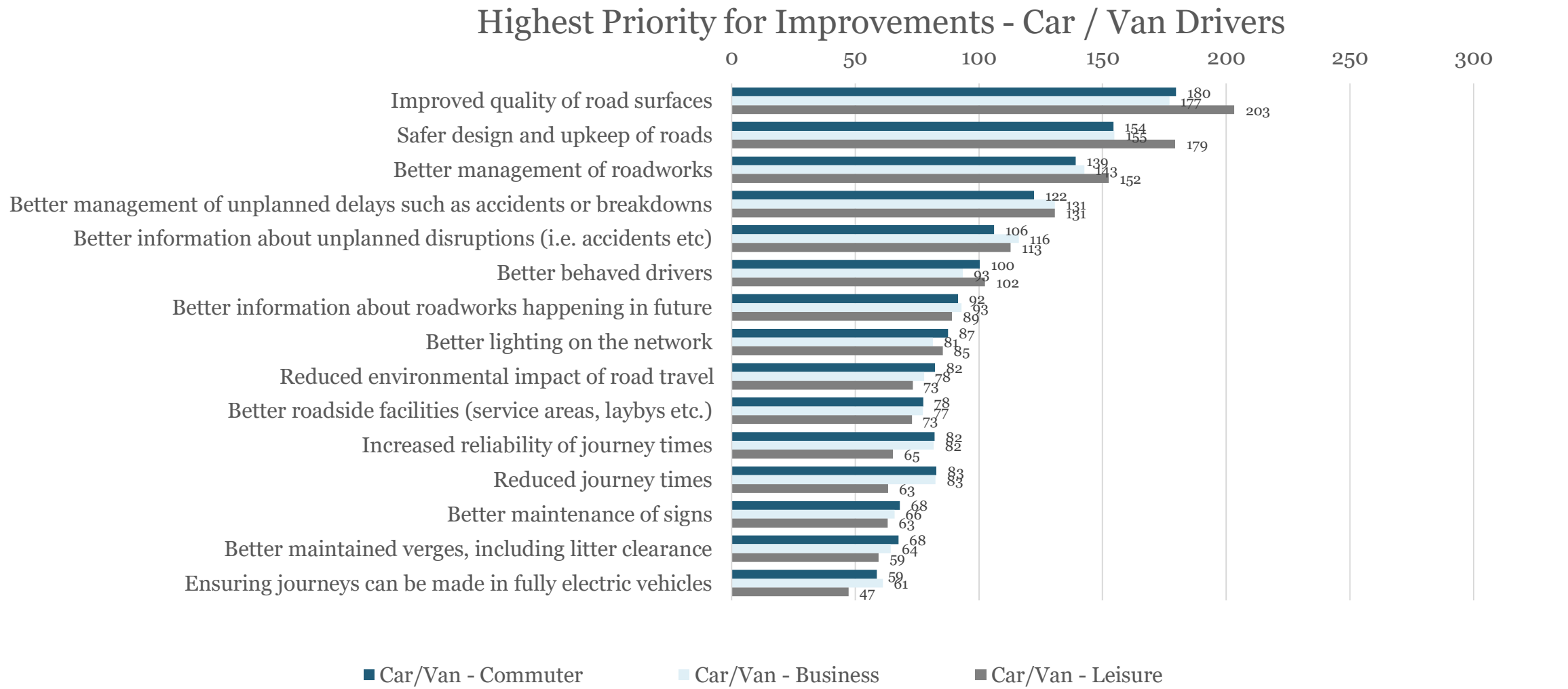
Detailed data splits



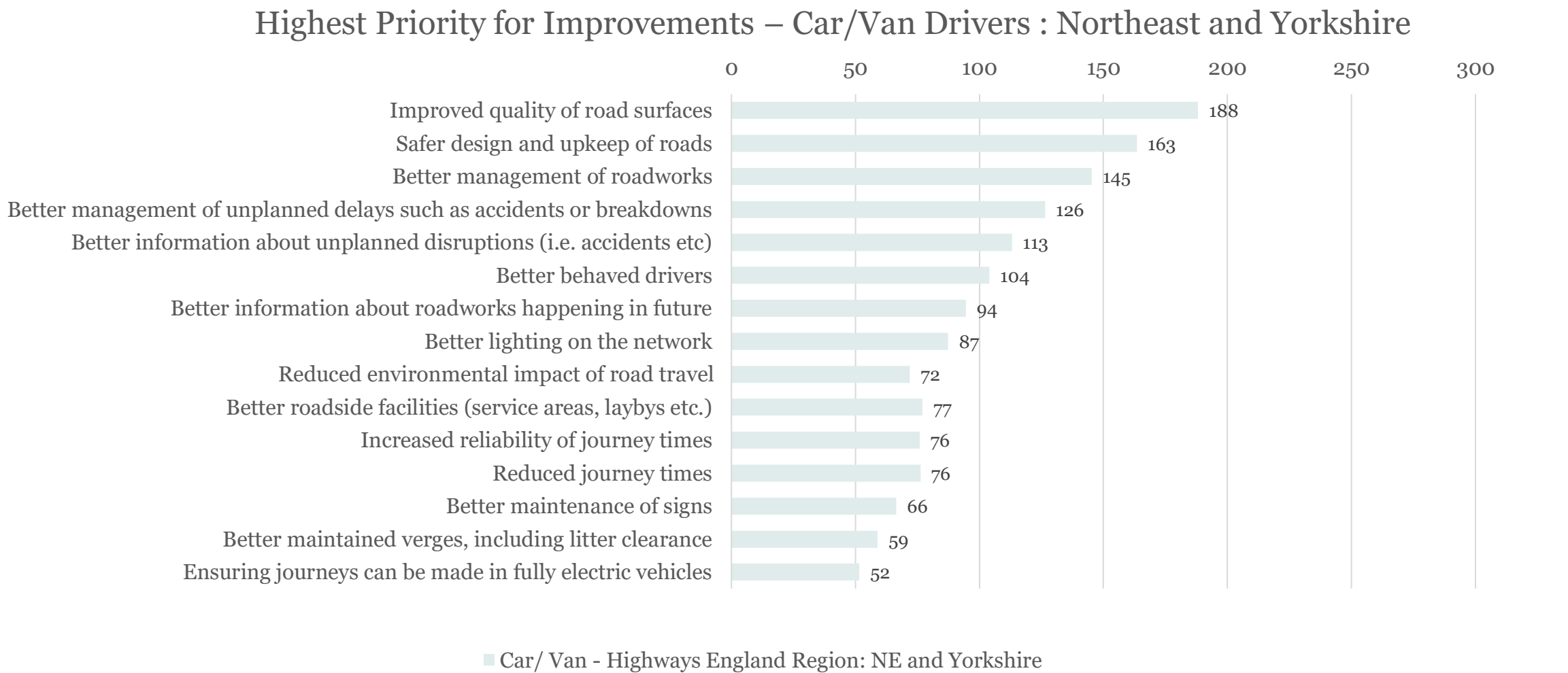
Reducing potholes was the most frequently mentioned improvement regardless of vehicle driven



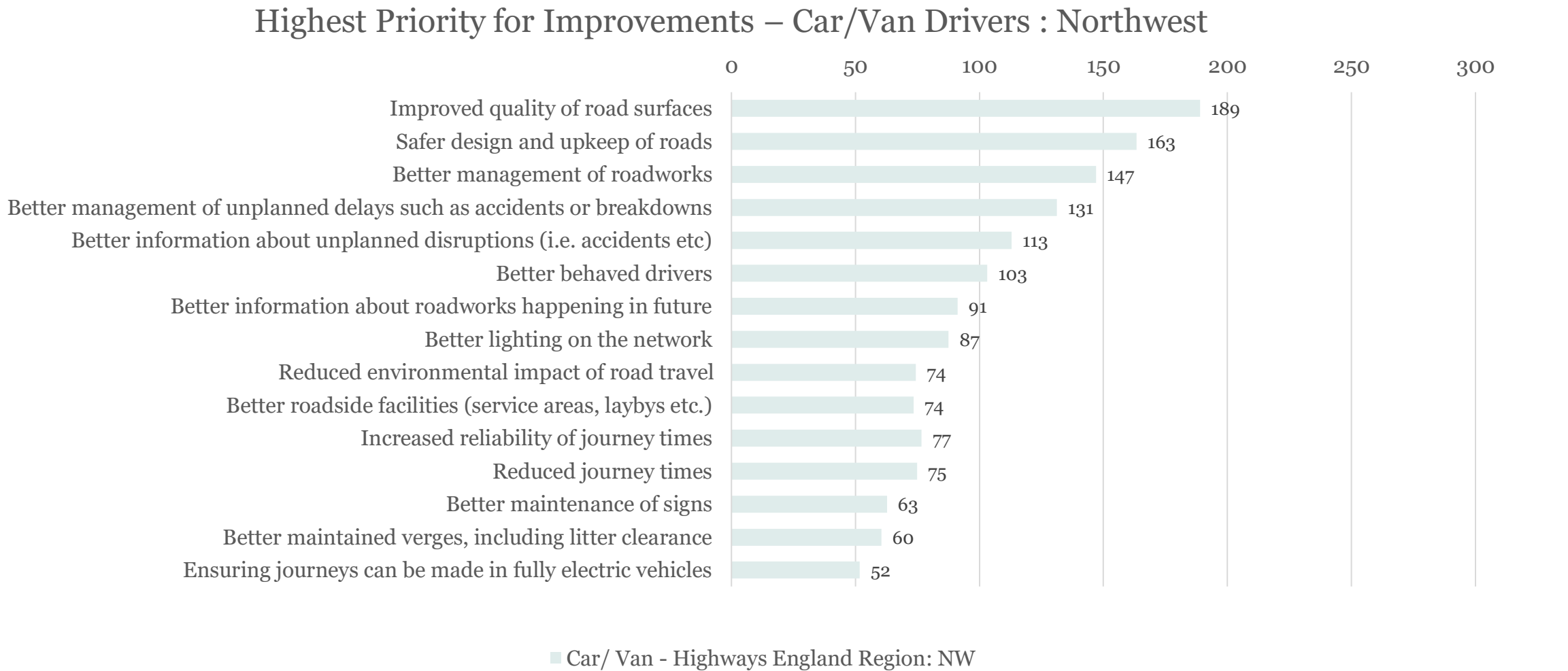
Those driving for leisure purposes are most likely to want better road surfaces and safer roads relative to other improvements



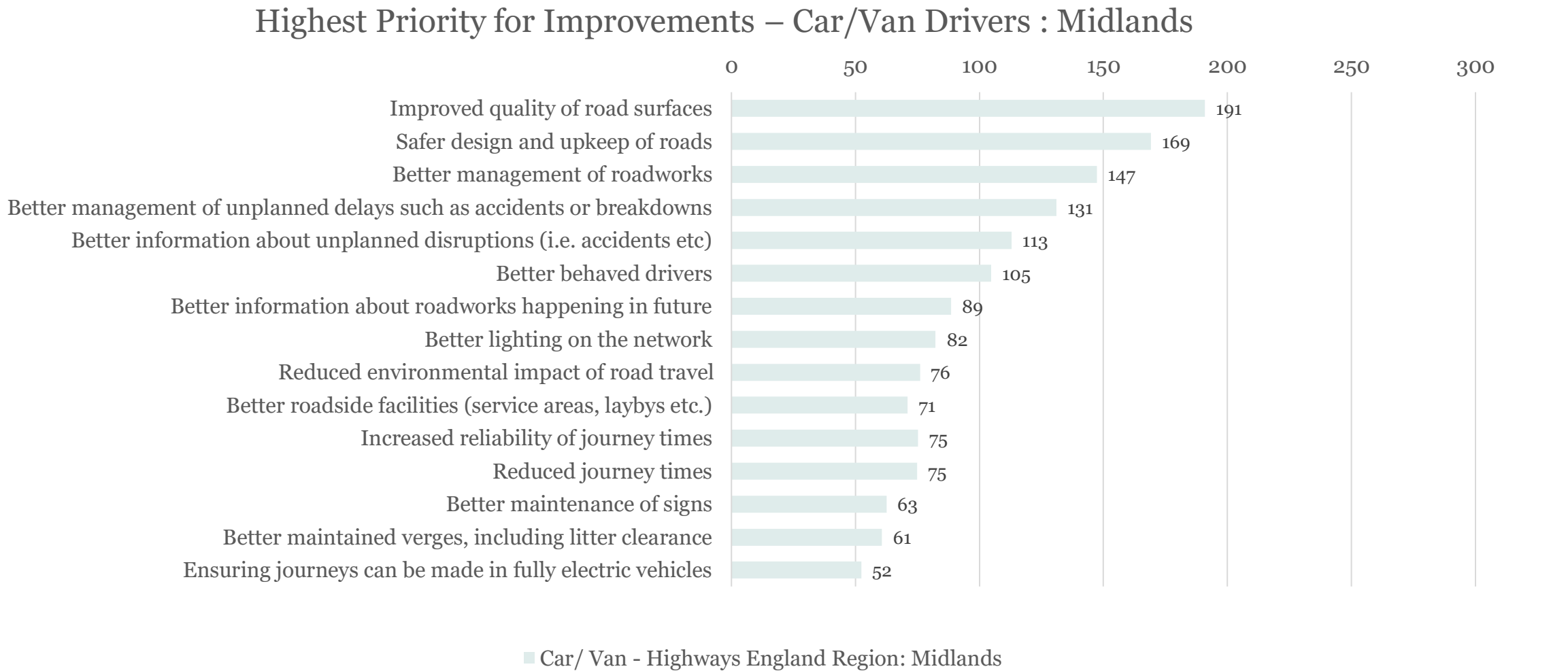
Overall priorities for improvement are very similar across all regions



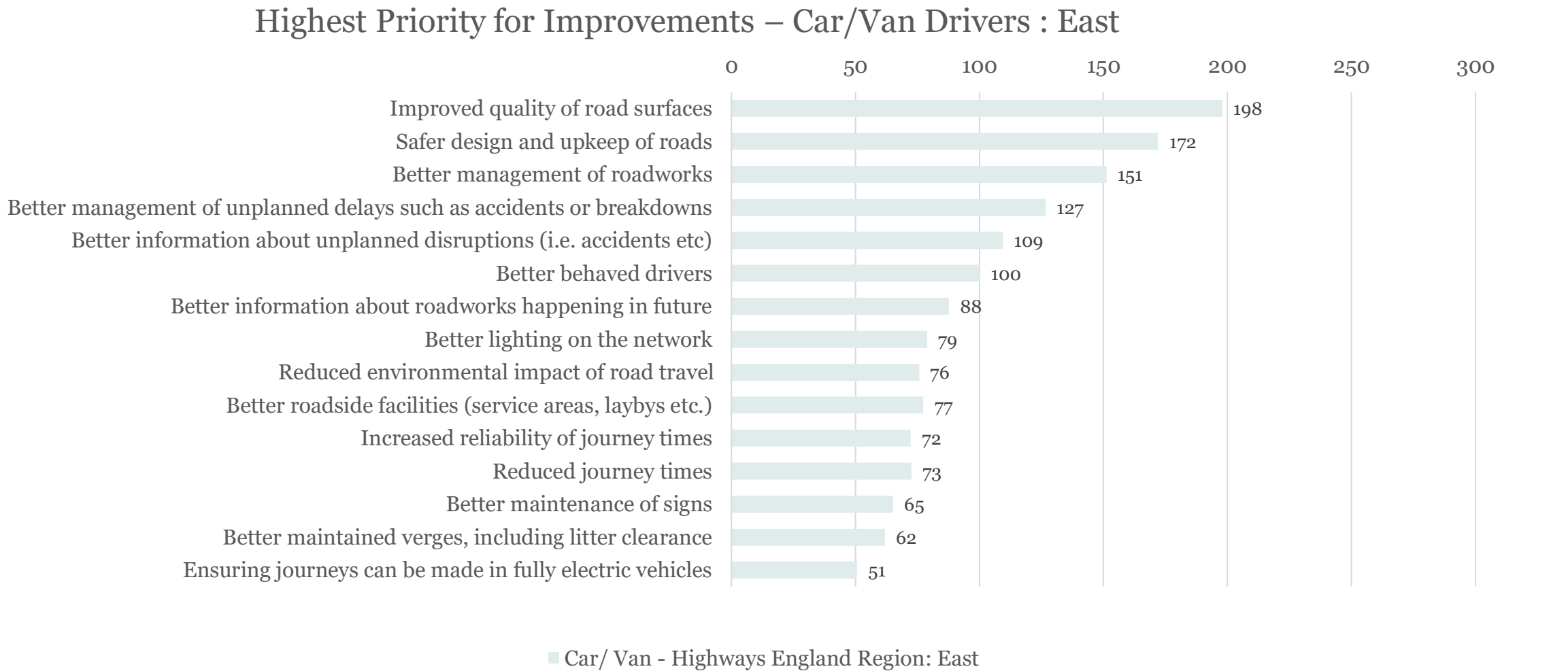
Overall priorities for improvement are very similar across all regions



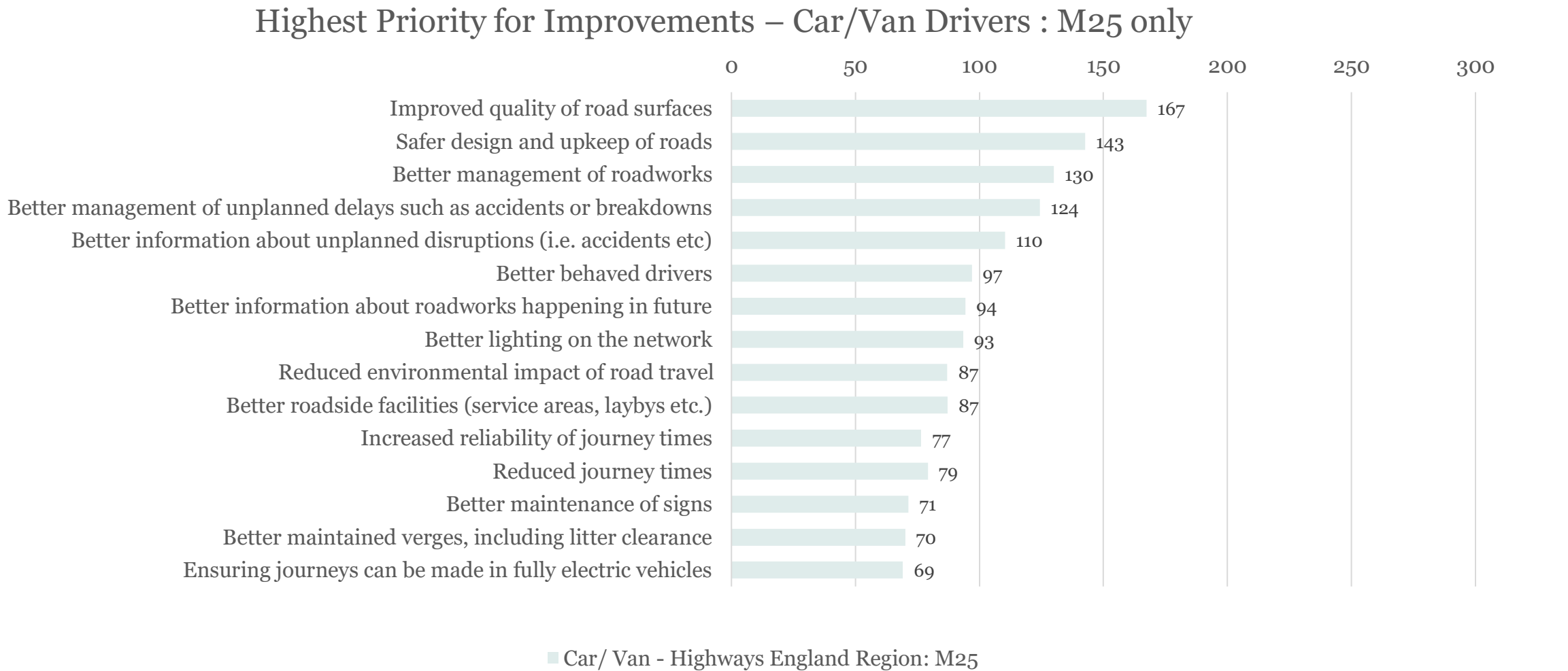
Overall priorities for improvement are very similar across all regions



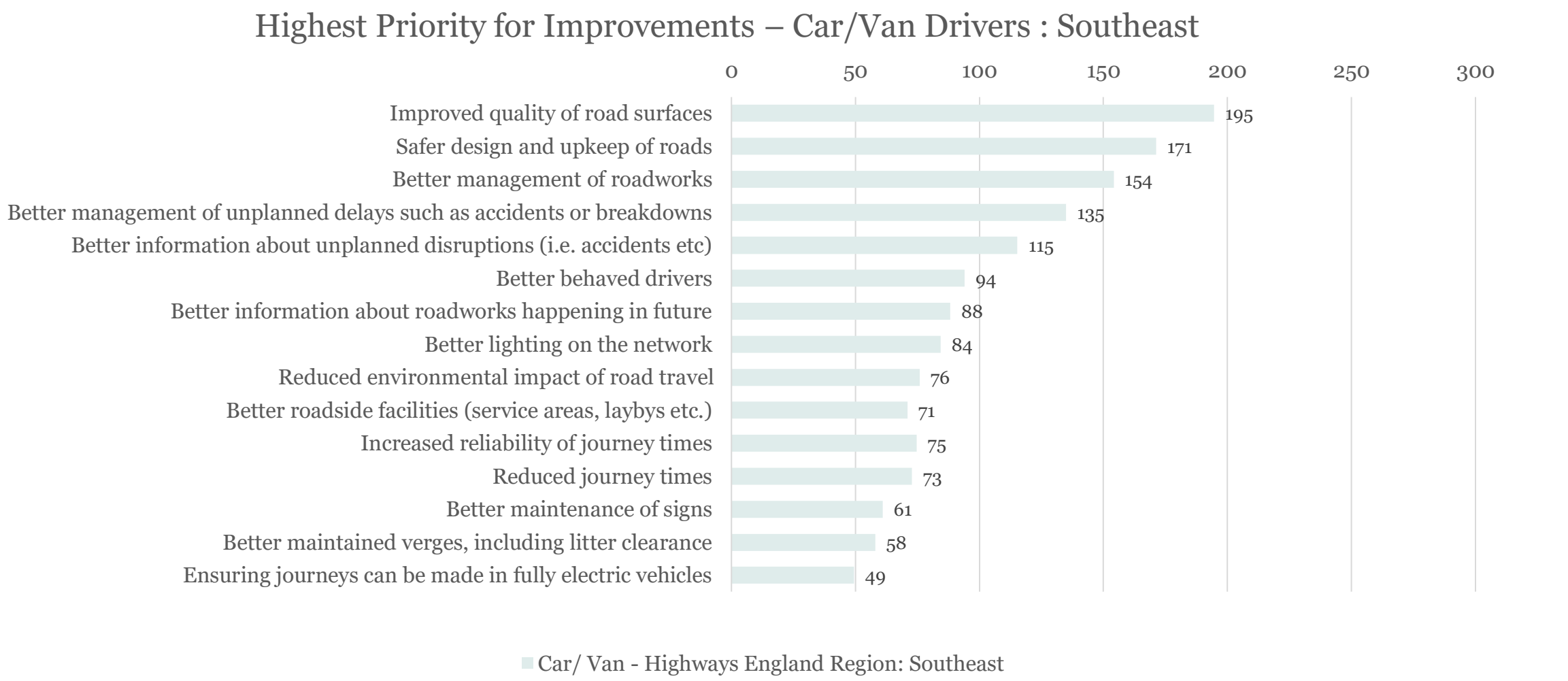
Overall priorities for improvement are very similar across all regions



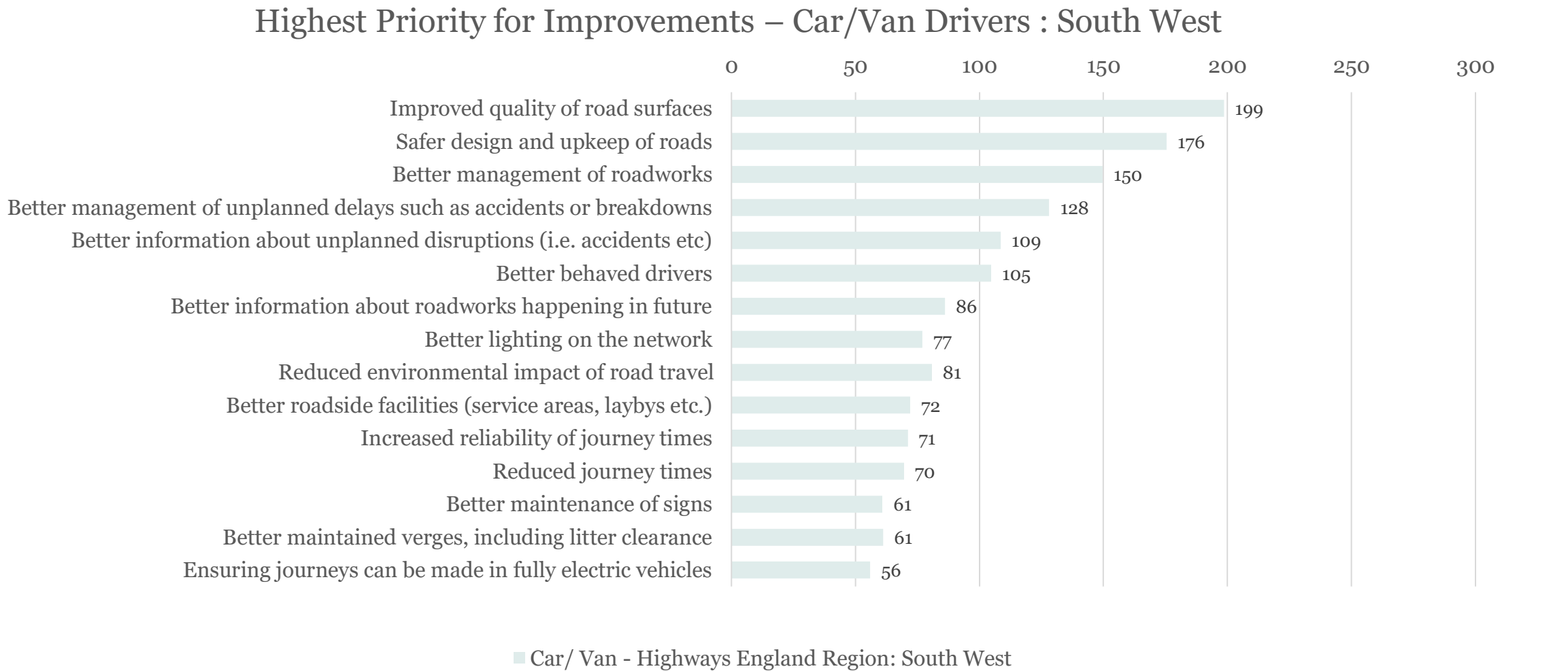
Overall priorities for improvement are very similar across all regions



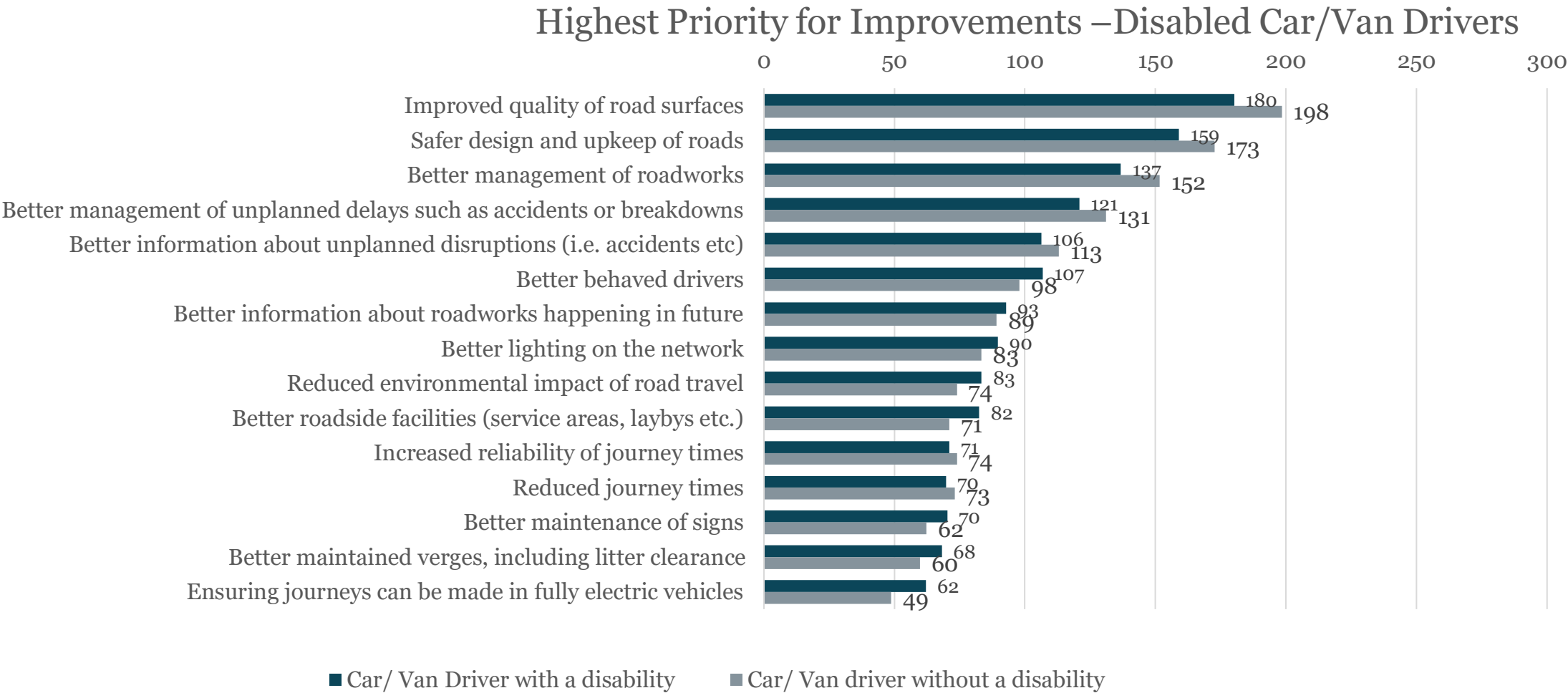
Overall priorities for improvement are very similar across all regions



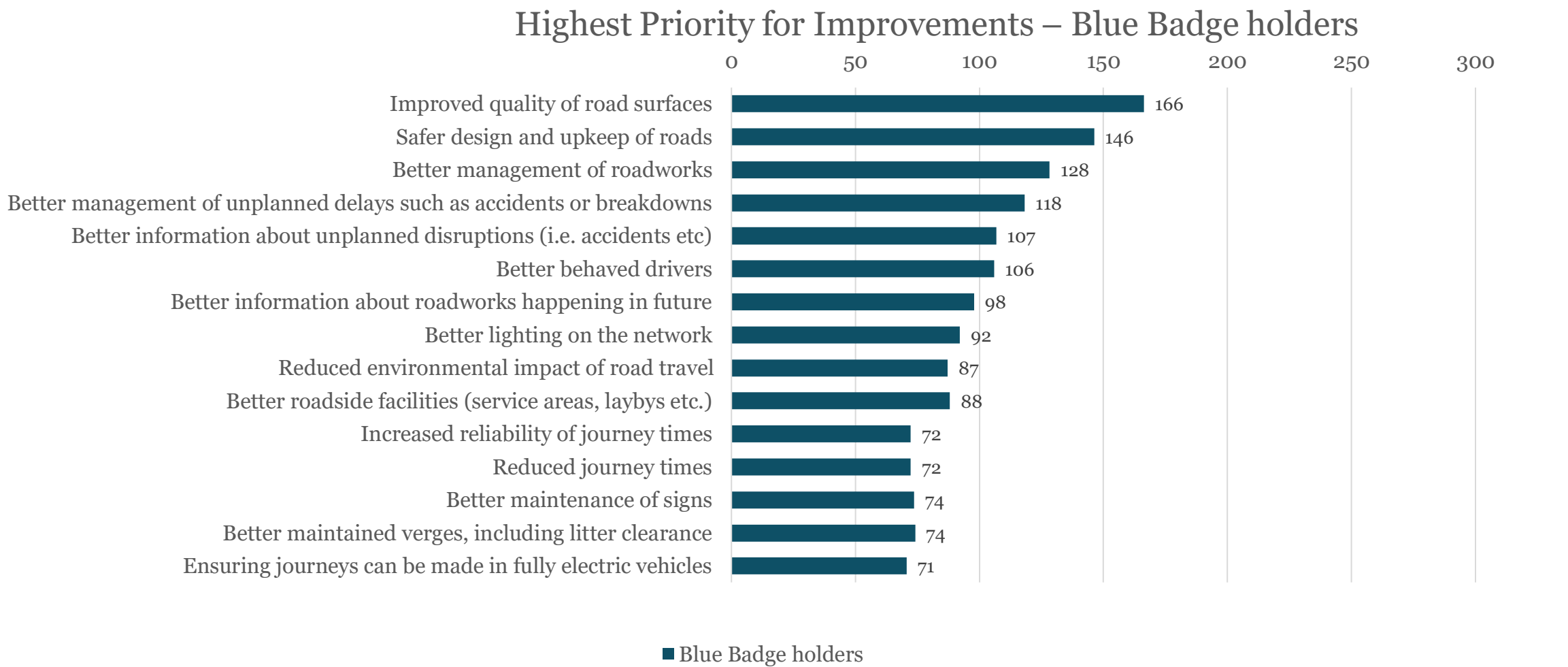
Overall priorities for improvement are very similar across all regions



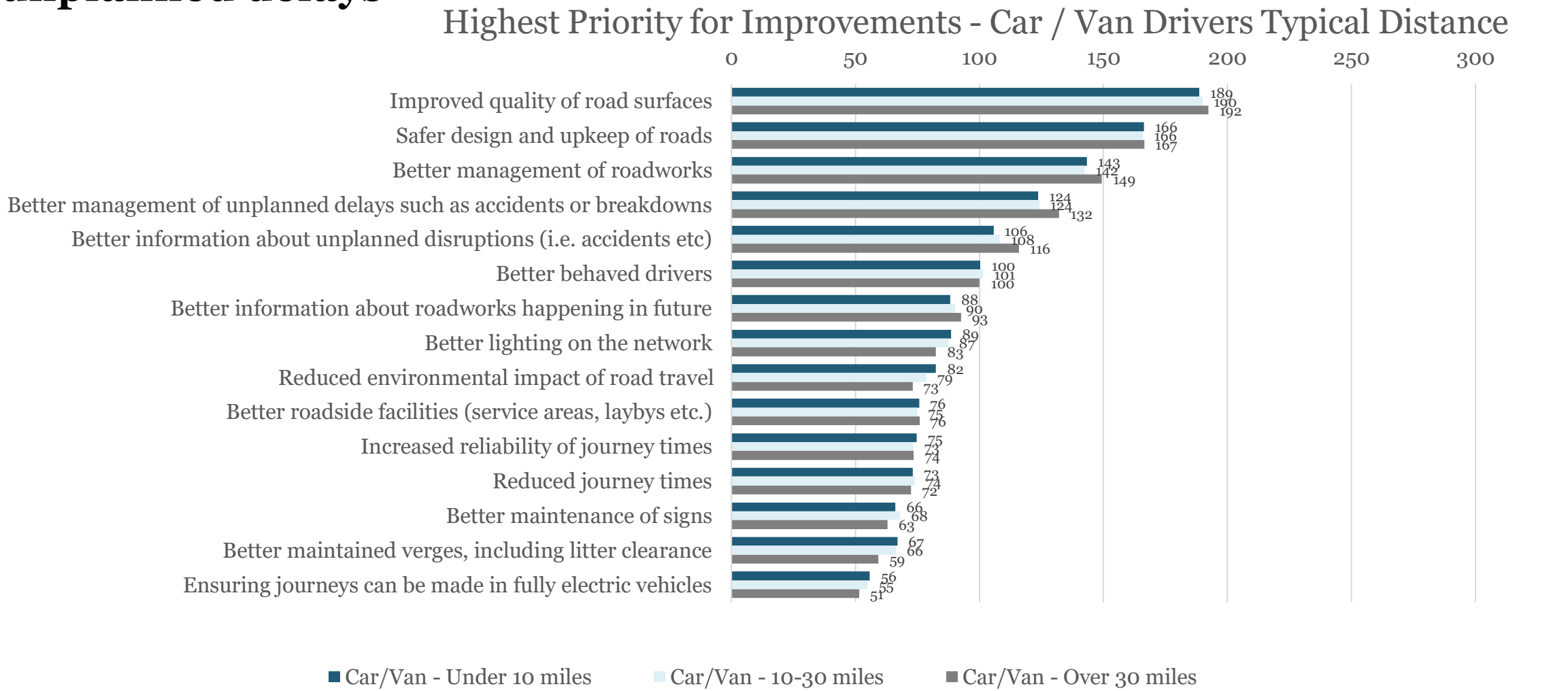
There is little difference in the priorities for improvement between those with or without a disability



Better roadside facilities are slightly more important to Blue Badge holders than users in general

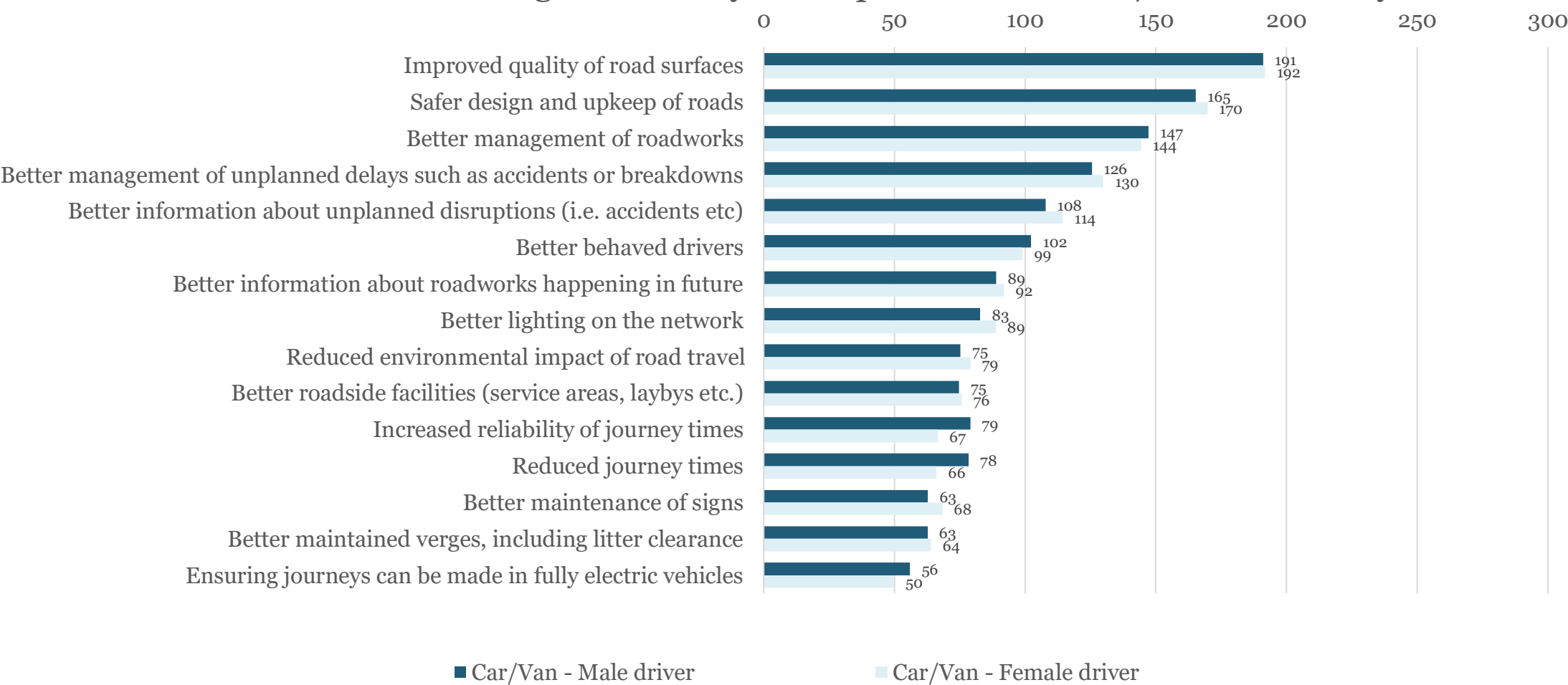


Those who tend to drive further on the SRN are more likely to prioritise improved management of roadworks and dealing with unplanned delays

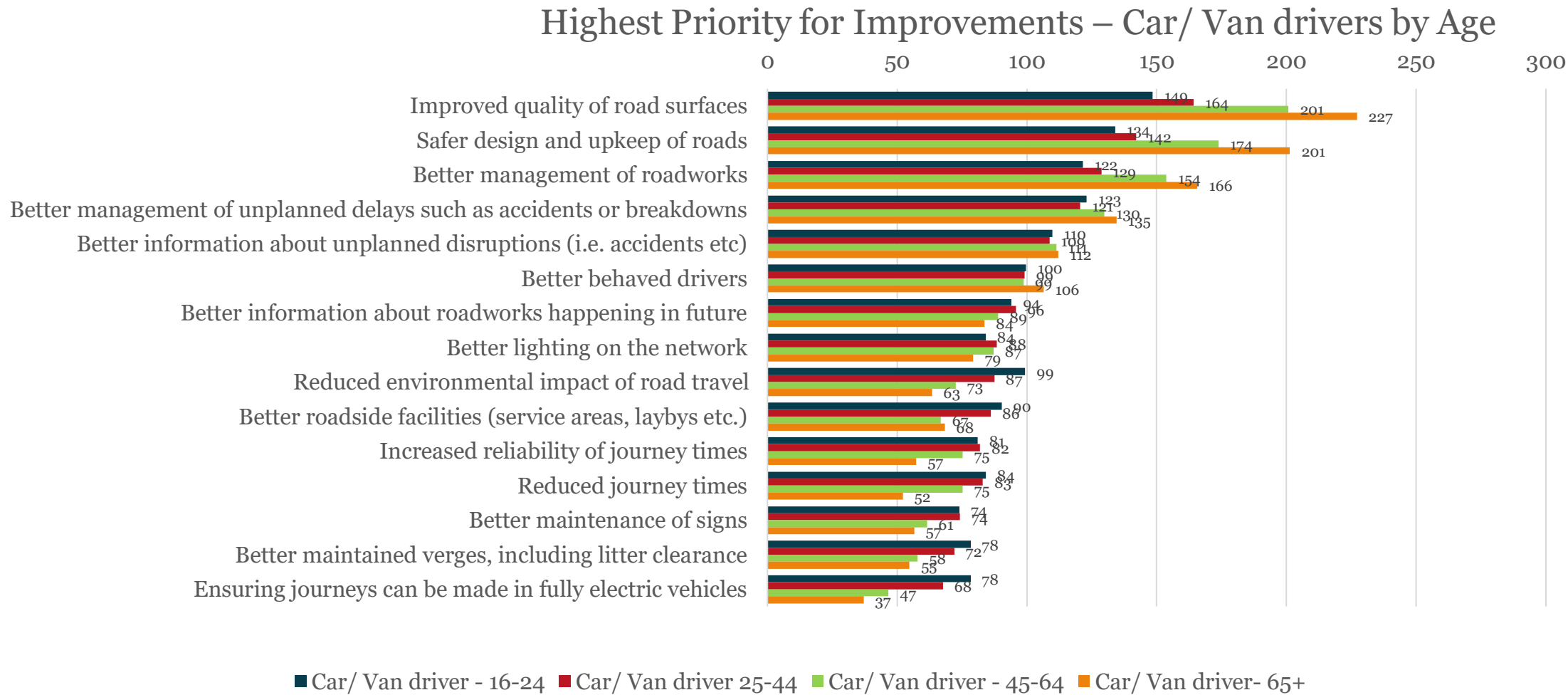


Men are more likely than women to prioritise the reliability of journey times and make these journeys quicker

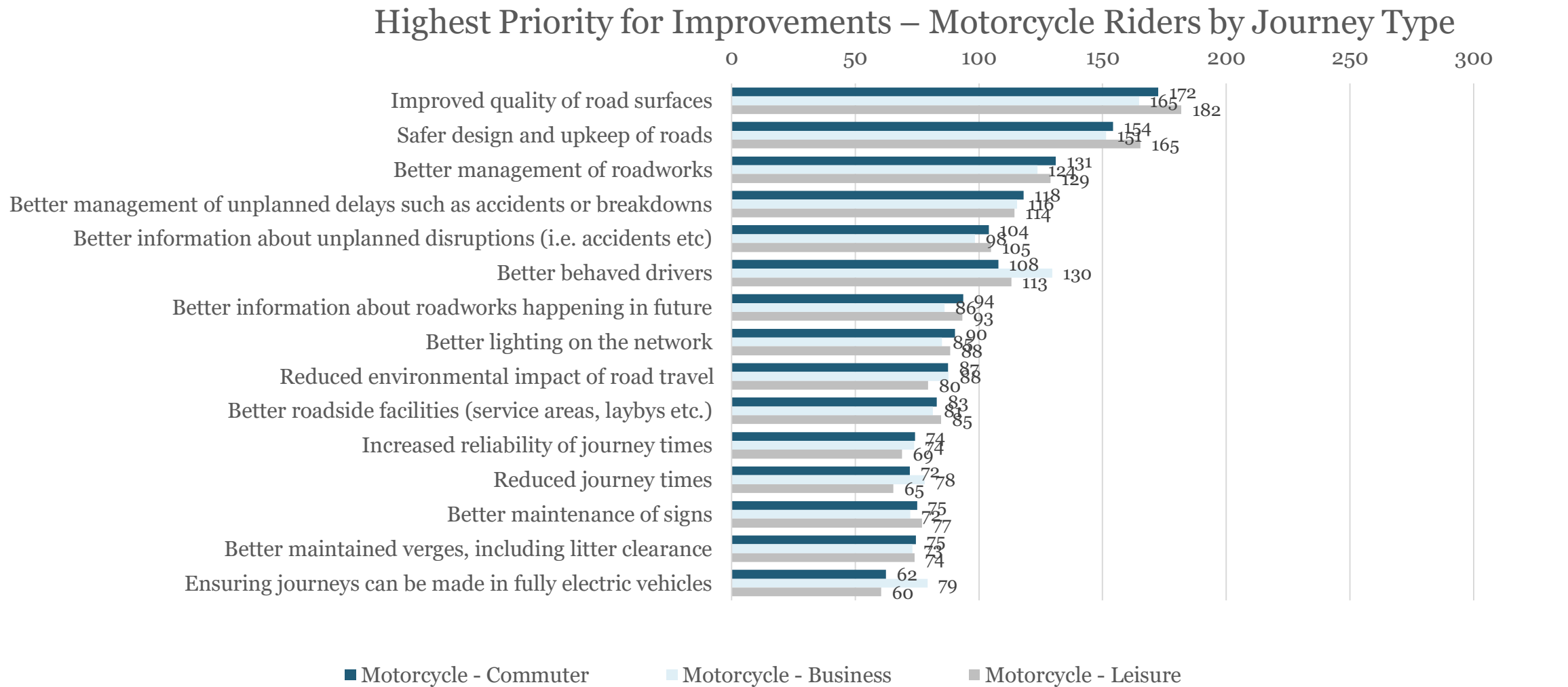
Highest Priority for Improvements - Car / Van Drivers by Gender



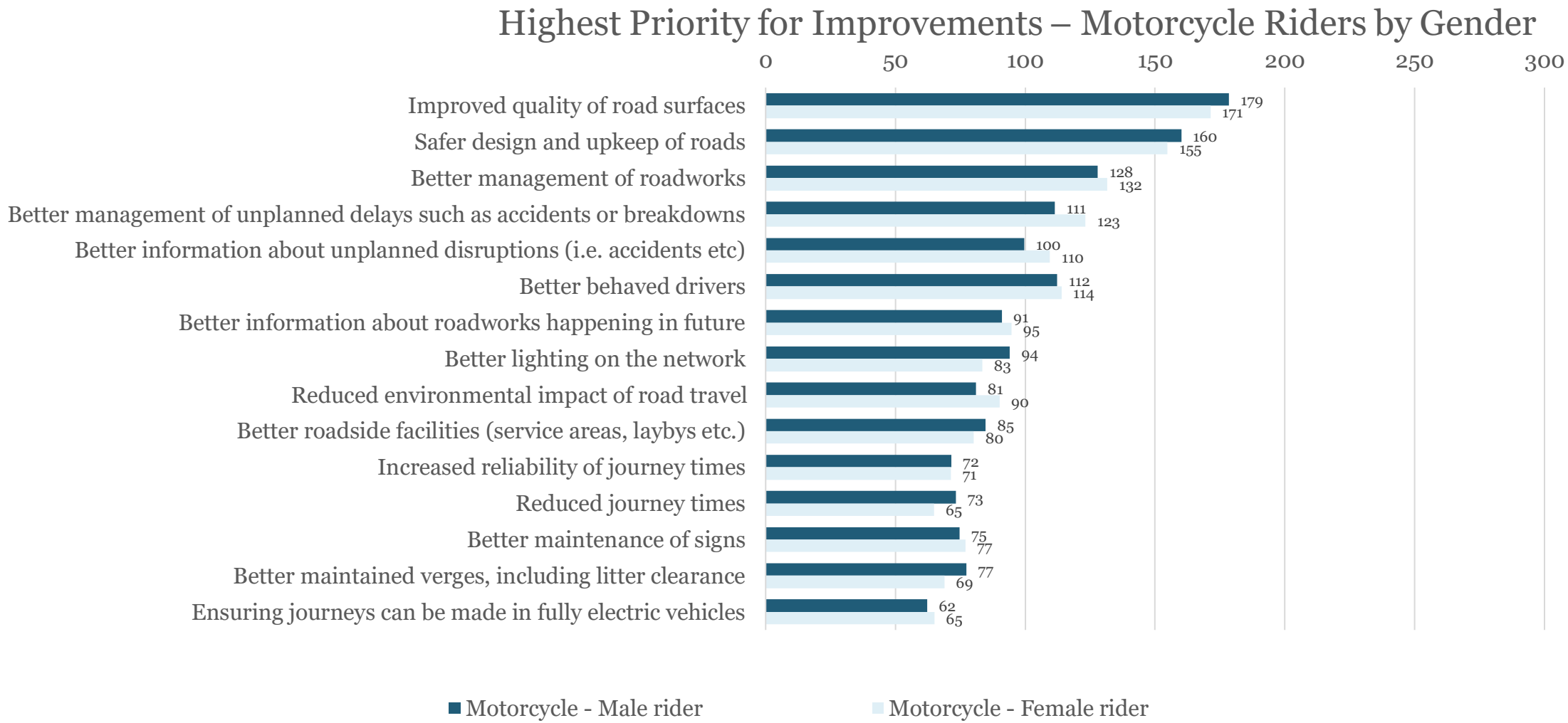
Older drivers are more likely to focus on the top 3 improvements whilst younger drivers have a more diverse range of priorities



Better behaved drivers is more important for motorcyclists who drive for business purposes



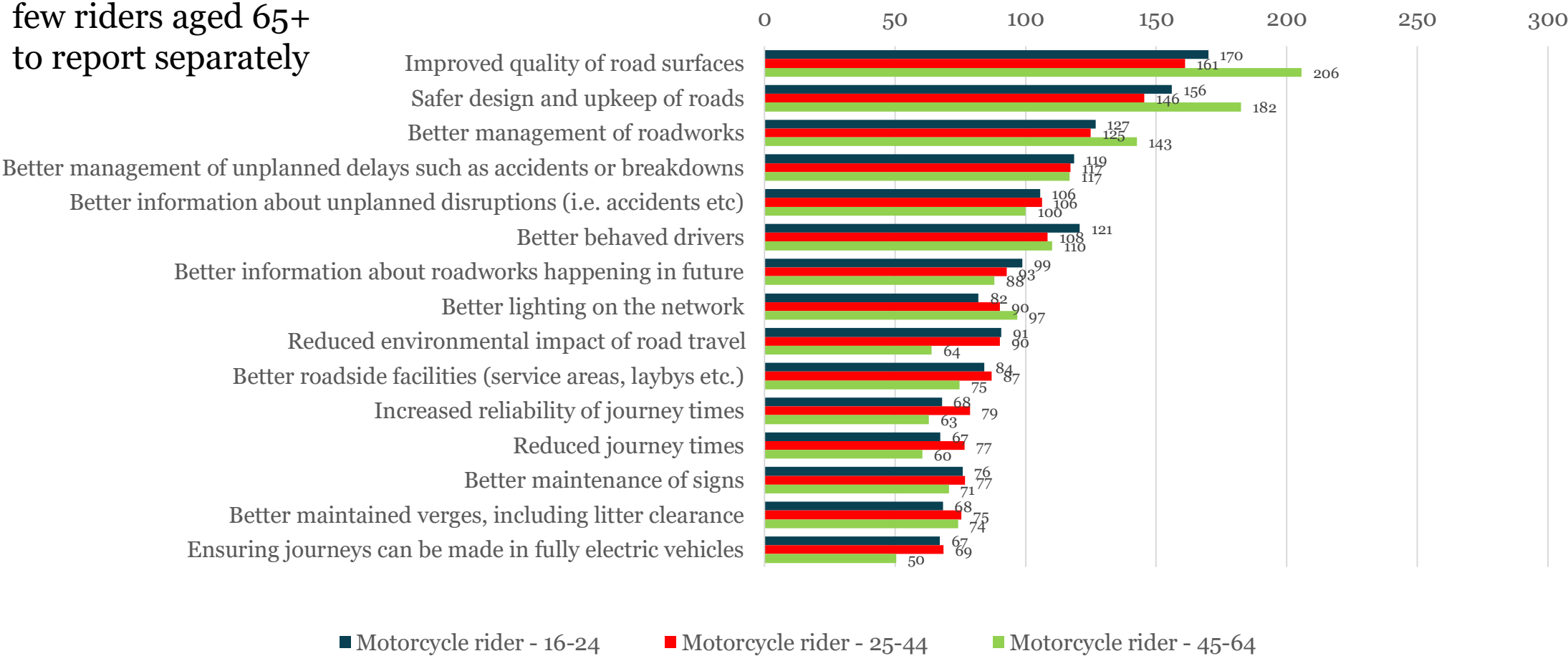
Female motorcyclists are more likely to prioritise dealing with unplanned delays than male ones



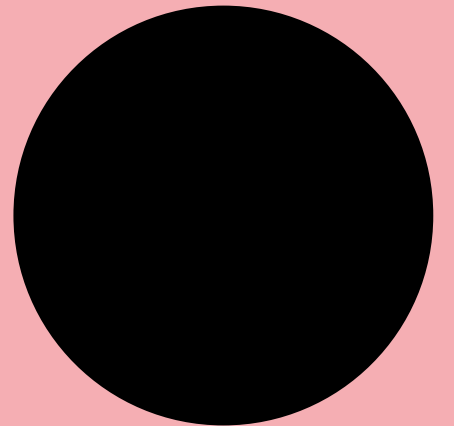
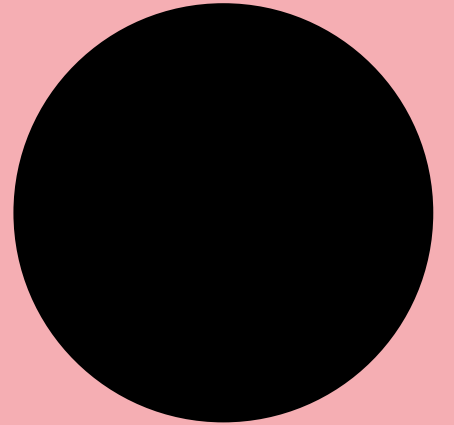
As seen with car drivers, older motorcyclists tend to focus on the top few improvements

N.B. there were too few riders aged 65+ to report separately

Highest Priority for Improvements – Motorcycle Riders by Age

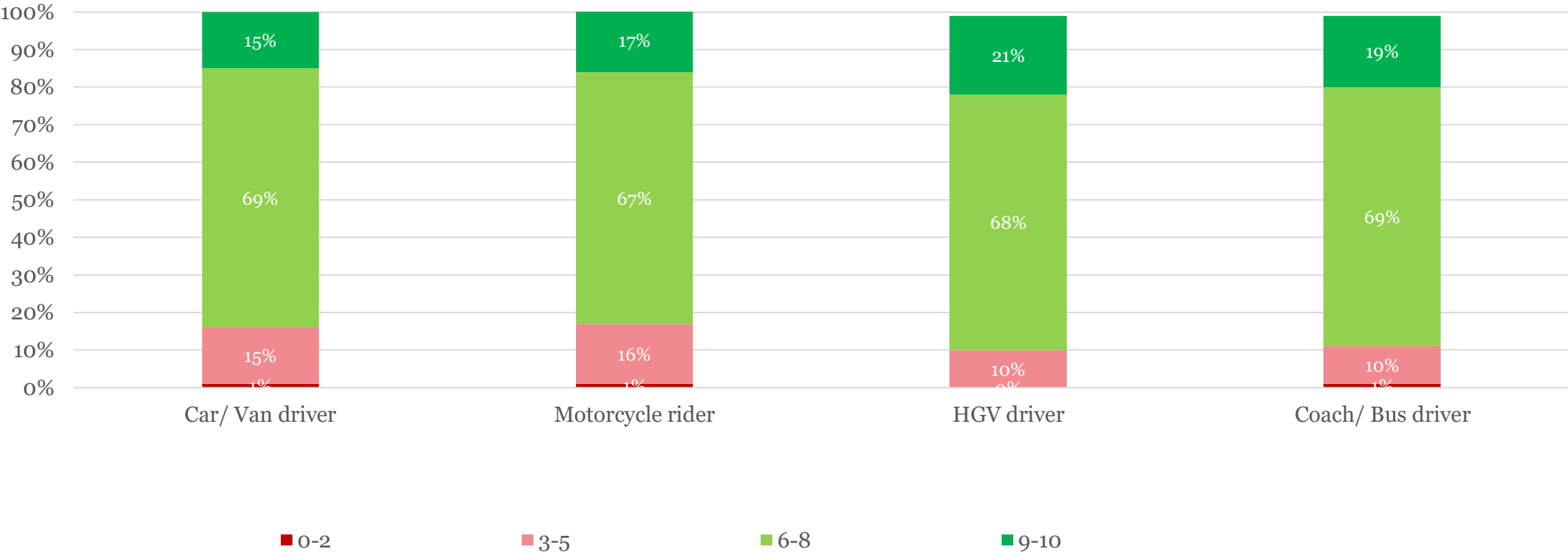


Roads & Motorway Perceptions



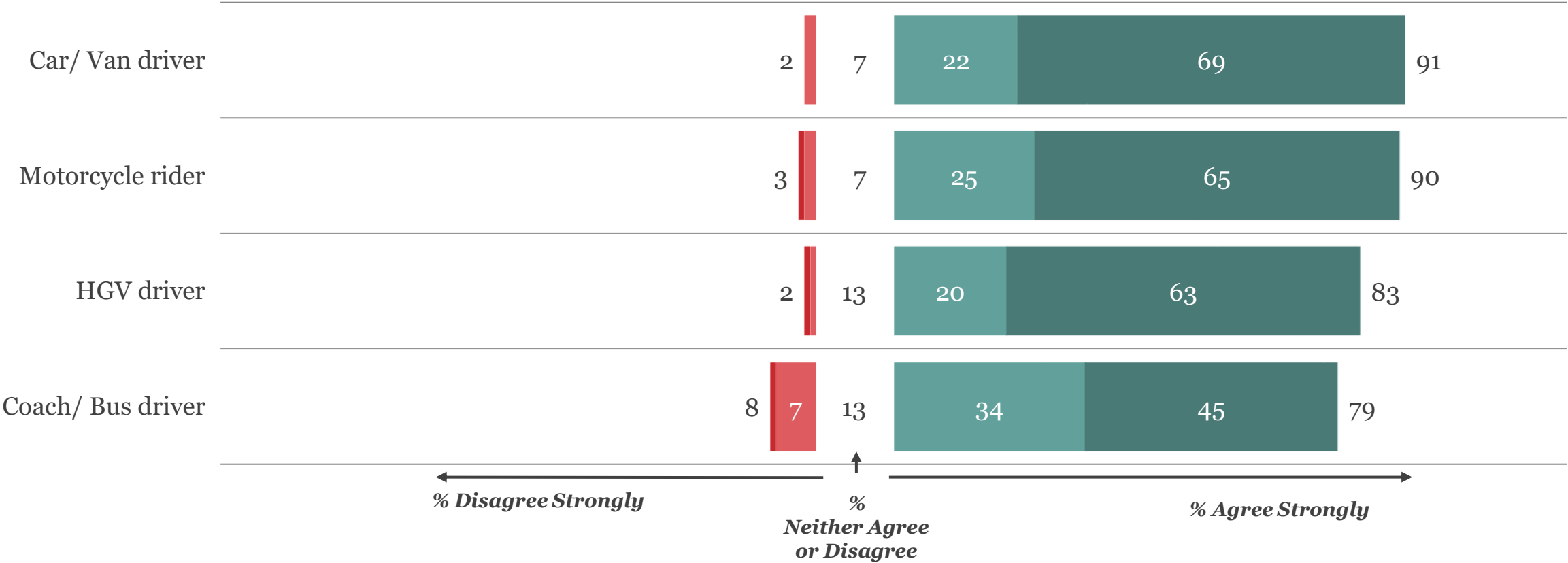
Around two-thirds of all road users rate their typical journey as 6-8 out of 10, very few rating it as 2 or lower

Ratings for Typical Journey on England's Roads/Motorways



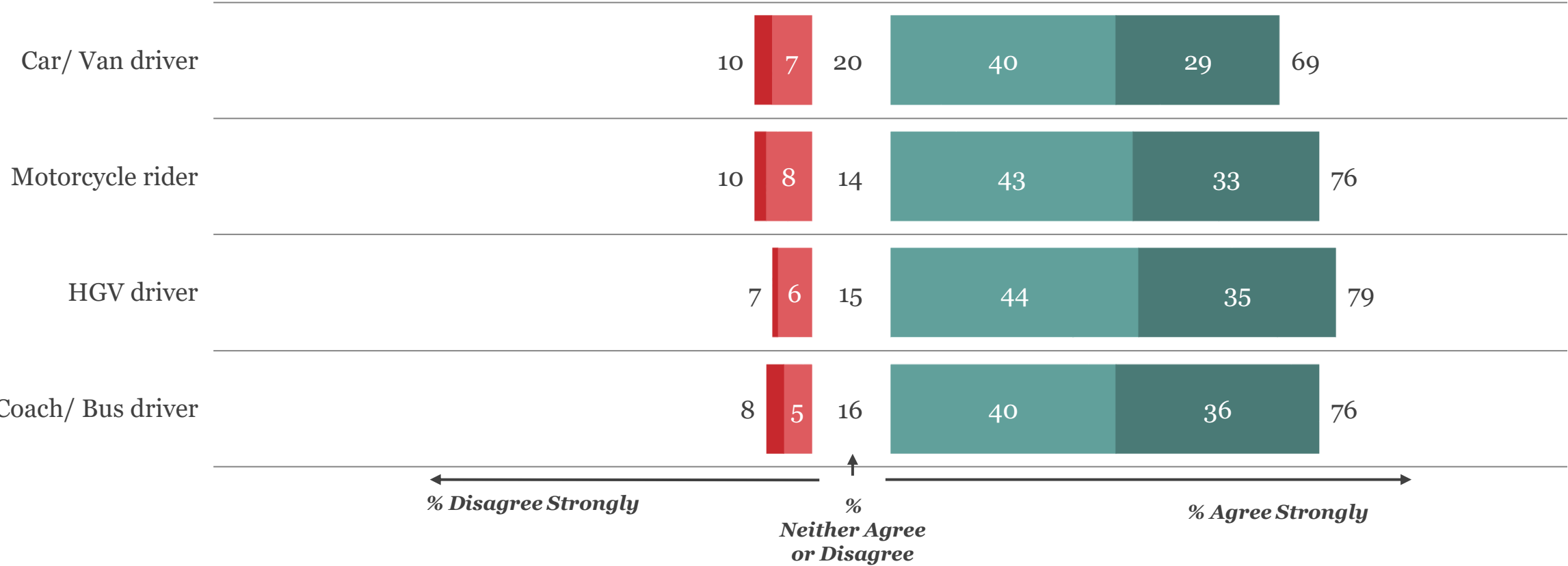
Coach/ bus drivers are less likely than others to ‘strongly agree’ that it is important to properly maintain existing motorways and major ‘A’ roads

It is very important to properly maintain the existing motorways and major ‘A’ roads



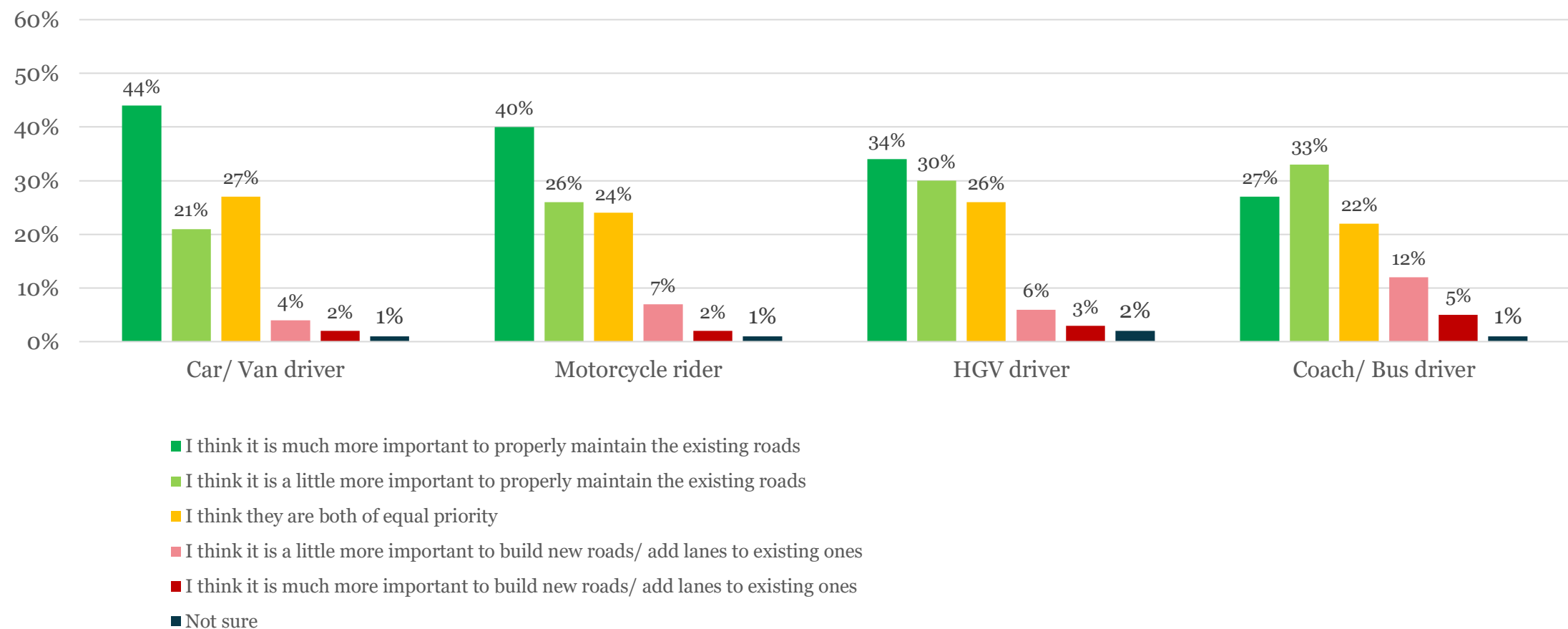
Car/ van drivers are the least likely users to agree that it is very important to build new roads/ add lanes to existing ones

It is very important to build new roads or to add extra lanes to existing roads



All users think it is more important to maintain existing roads than to build new ones/ add lanes to existing roads

Main Priority of the Road Network

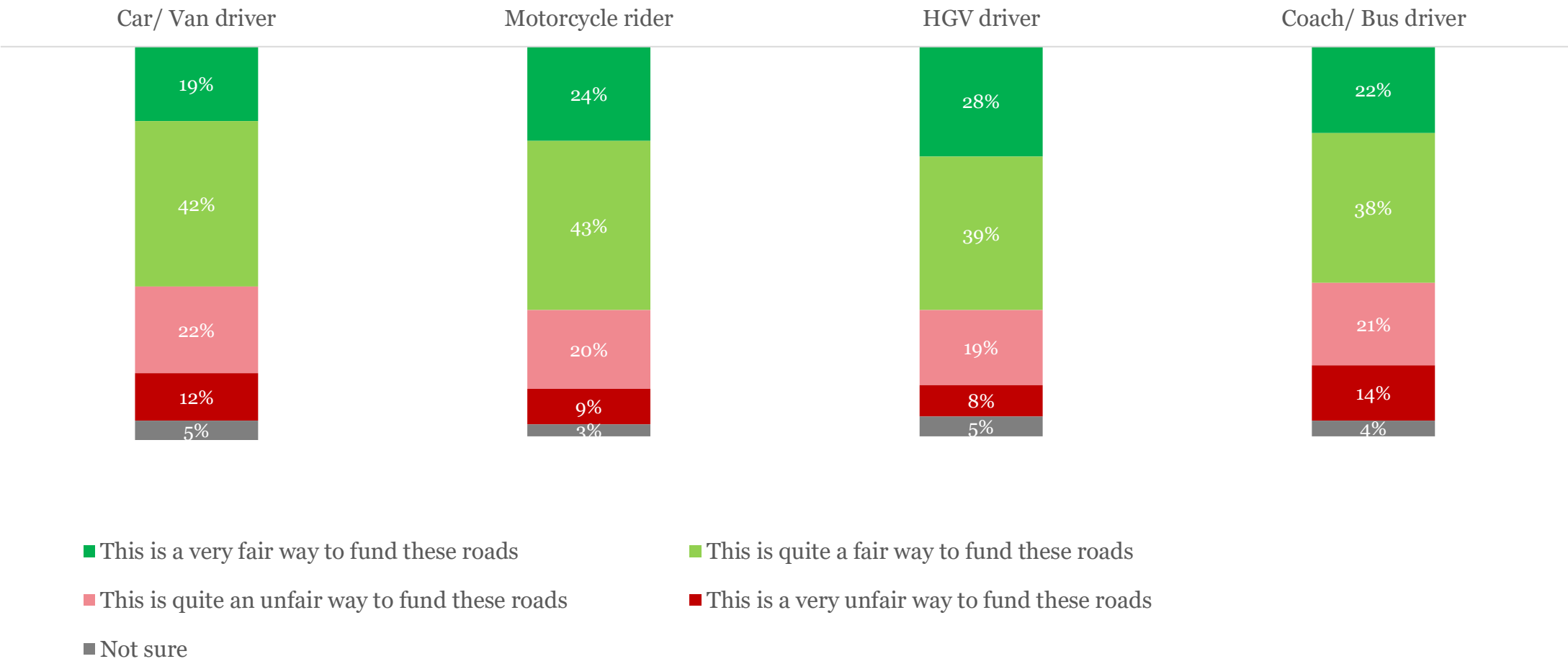


Q29 Still thinking about England’s motorways and major ‘A’ roads, overall do you think it is more important to properly maintain the existing motorways and major ‘A’ roads or to build new motorways/ major ‘A’ roads or to add new lanes to the existing roads

Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)

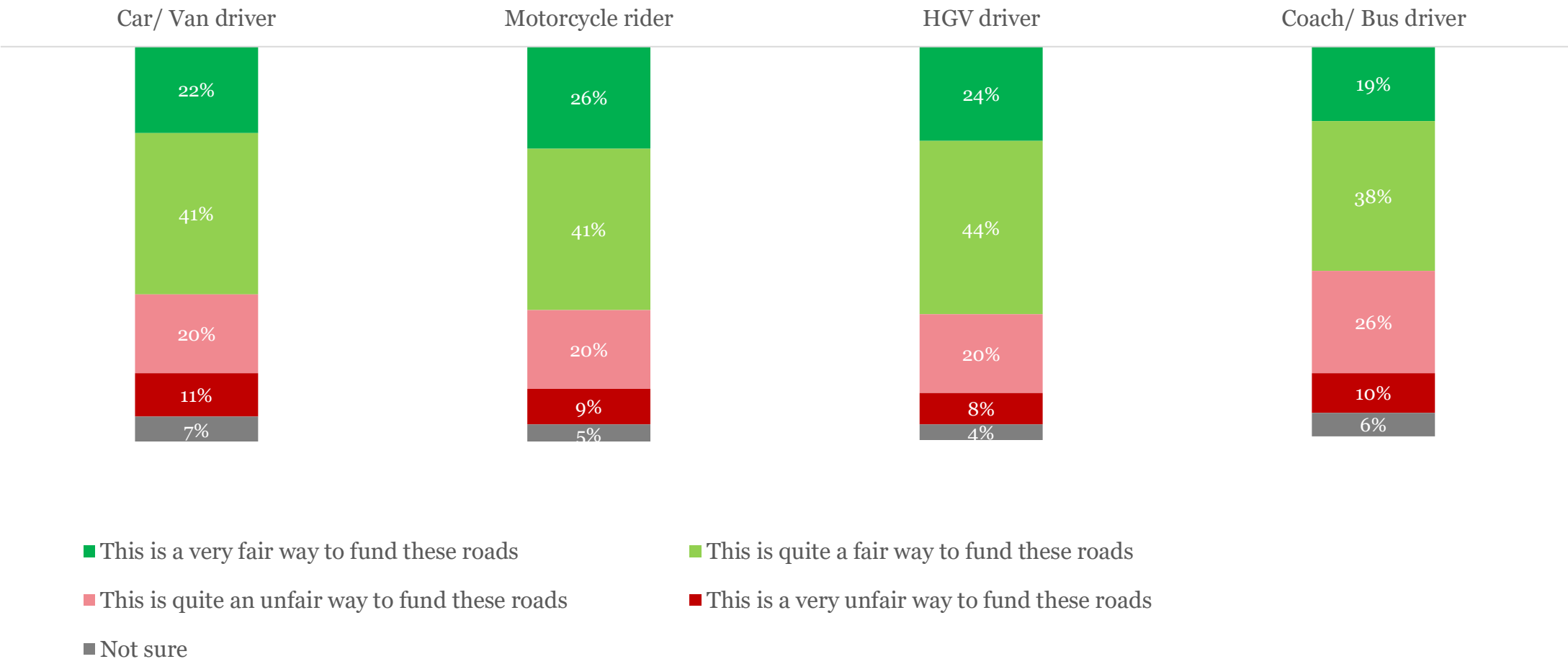
Whilst at slightly lower levels than most other users, 61% of car drivers feel a road fund licence on diesel/ petrol cars is a fair way to fund the SRN

Road Funding - Via car tax (road fund licences) for diesel/ petrol cars



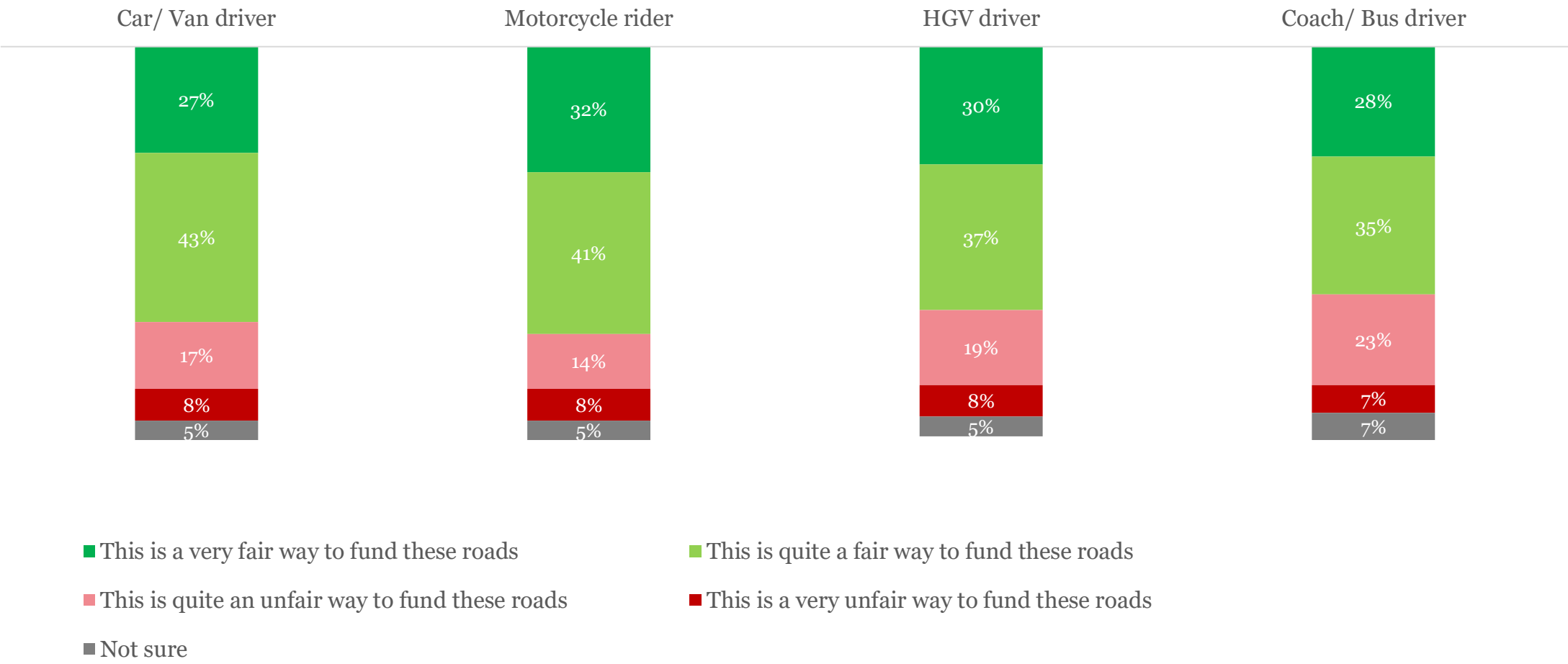
The majority of users feel using road fund licences for electric/ hybrid cars is a fair way to fund the SRN

Road Funding - Via car tax (road fund licences) for electric/ hybrid cars

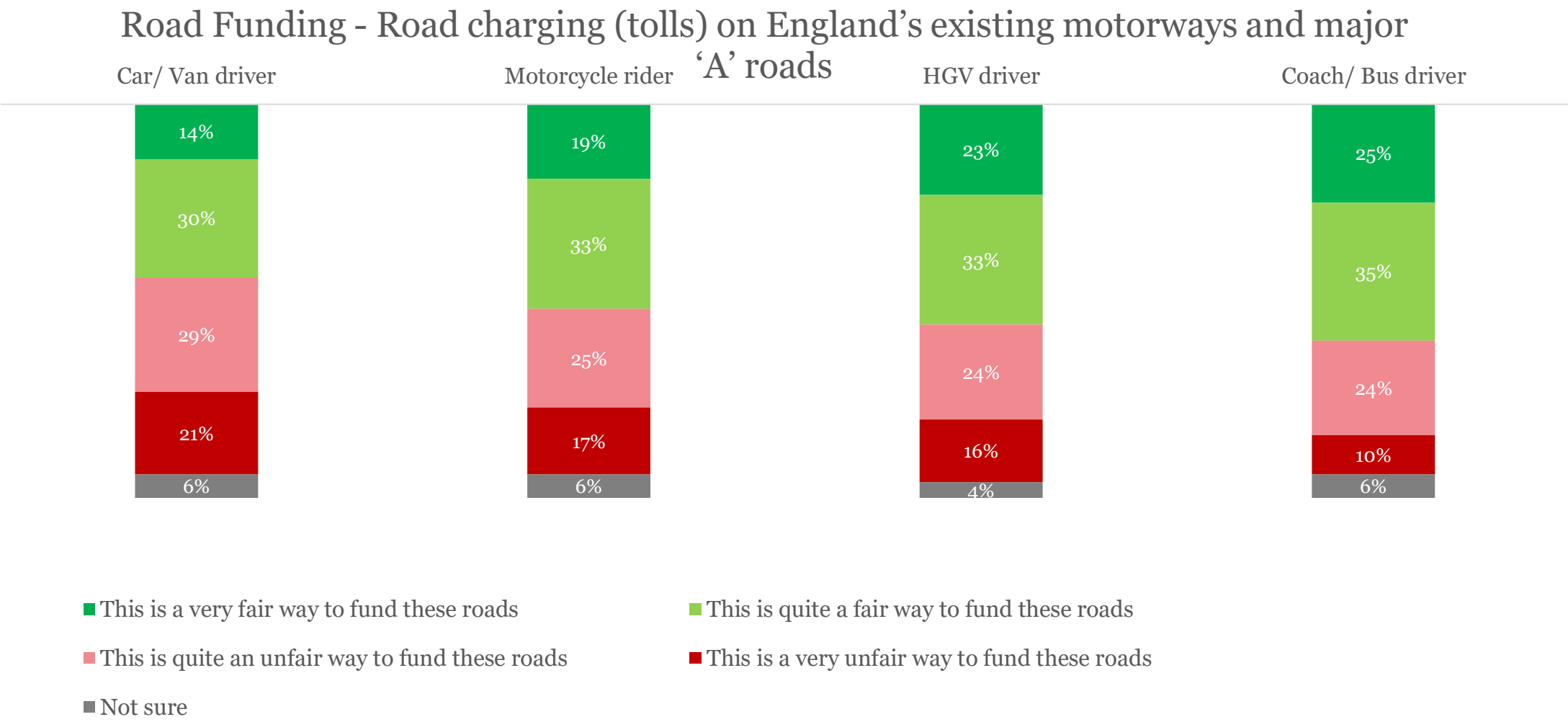


The majority of commercial vehicle drivers feel that using road fund licences for commercial vehicles is a fair way to fund the SRN

Road Funding - Via road tax (road fund licences) for commercial vehicles

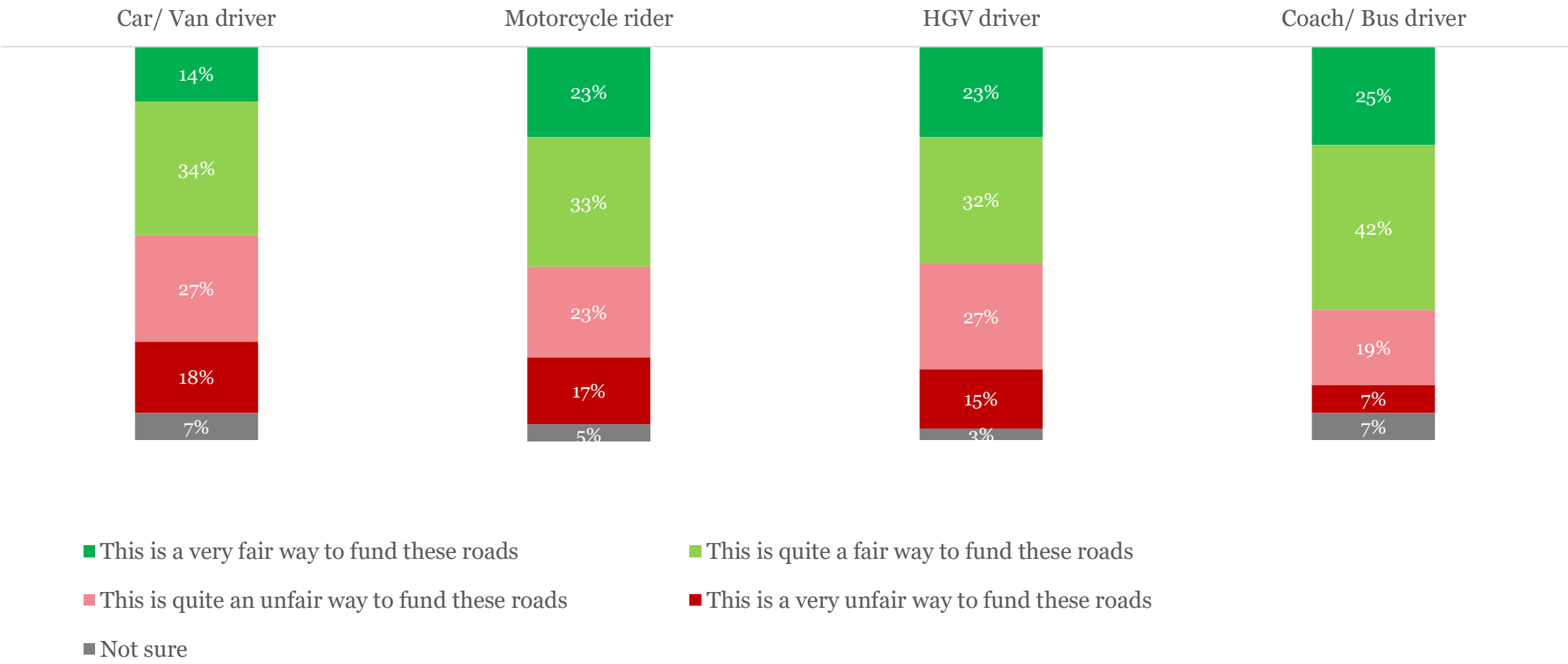


Road charging has least appeal amongst car/ van drivers



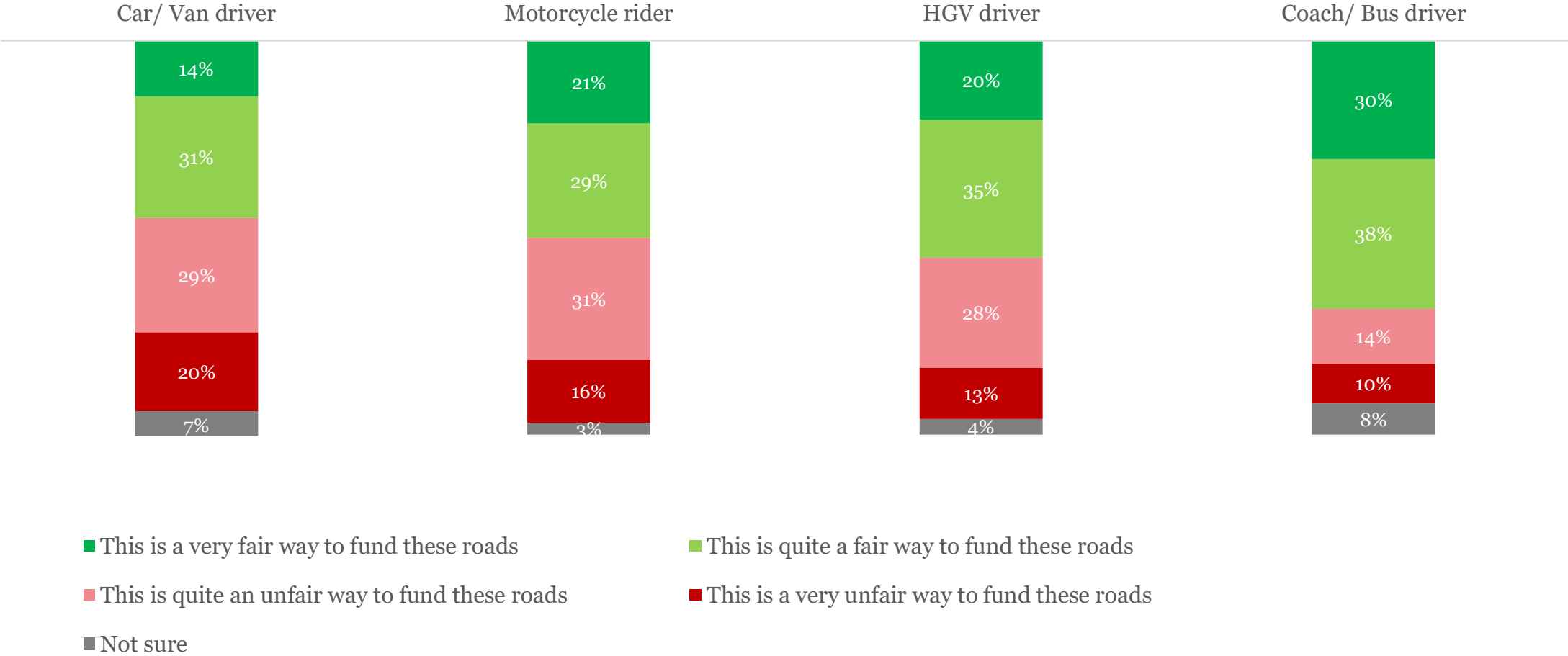
Road charging on new roads/ river crossings is seen as fairer than the implementation of general road charging schemes

Road Funding - Road charging (tolls) on any new roads and river crossings



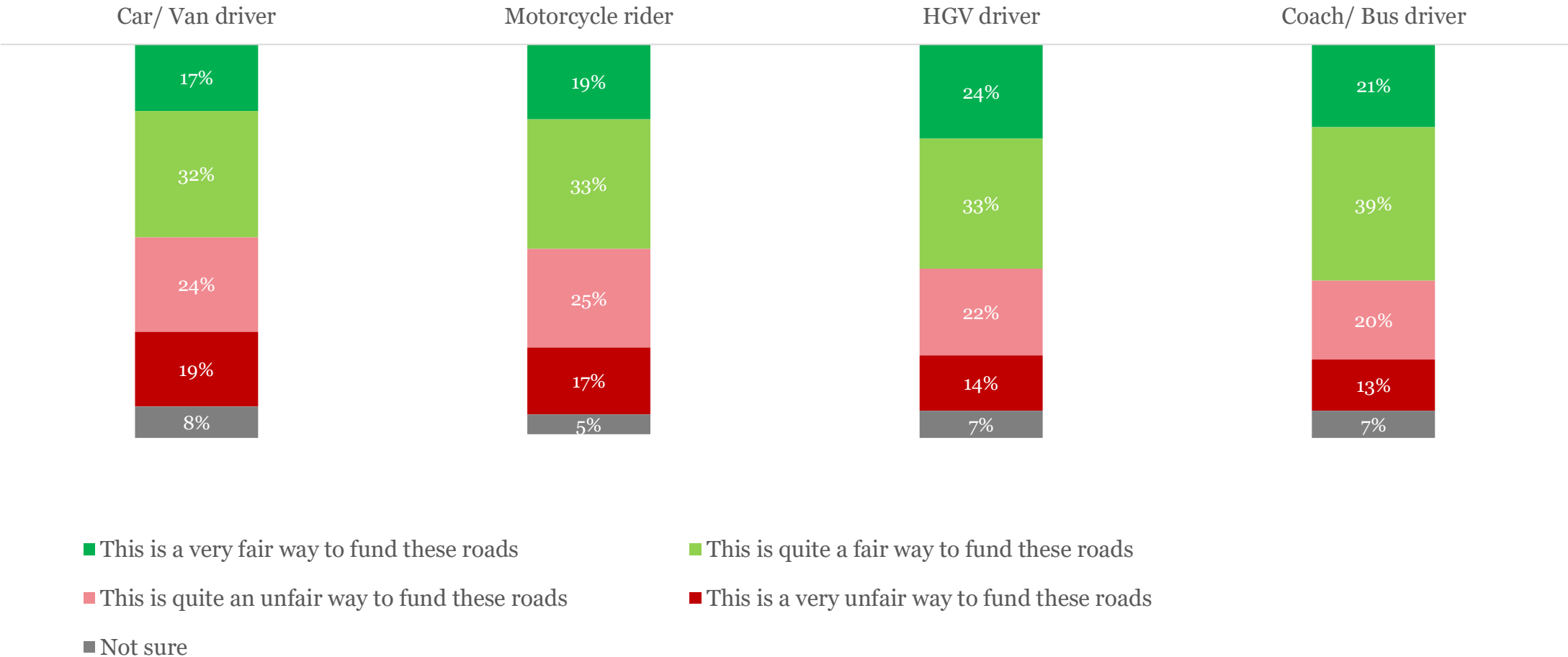
Almost half of car/ van drivers do not feel that city centre road charging would be a fair way to fund the SRN (highest appeal is amongst coach/ bus drivers)

Road Funding - Road charging (tolls) in city centres with this money diverted to England's motorways/ major 'A' roads



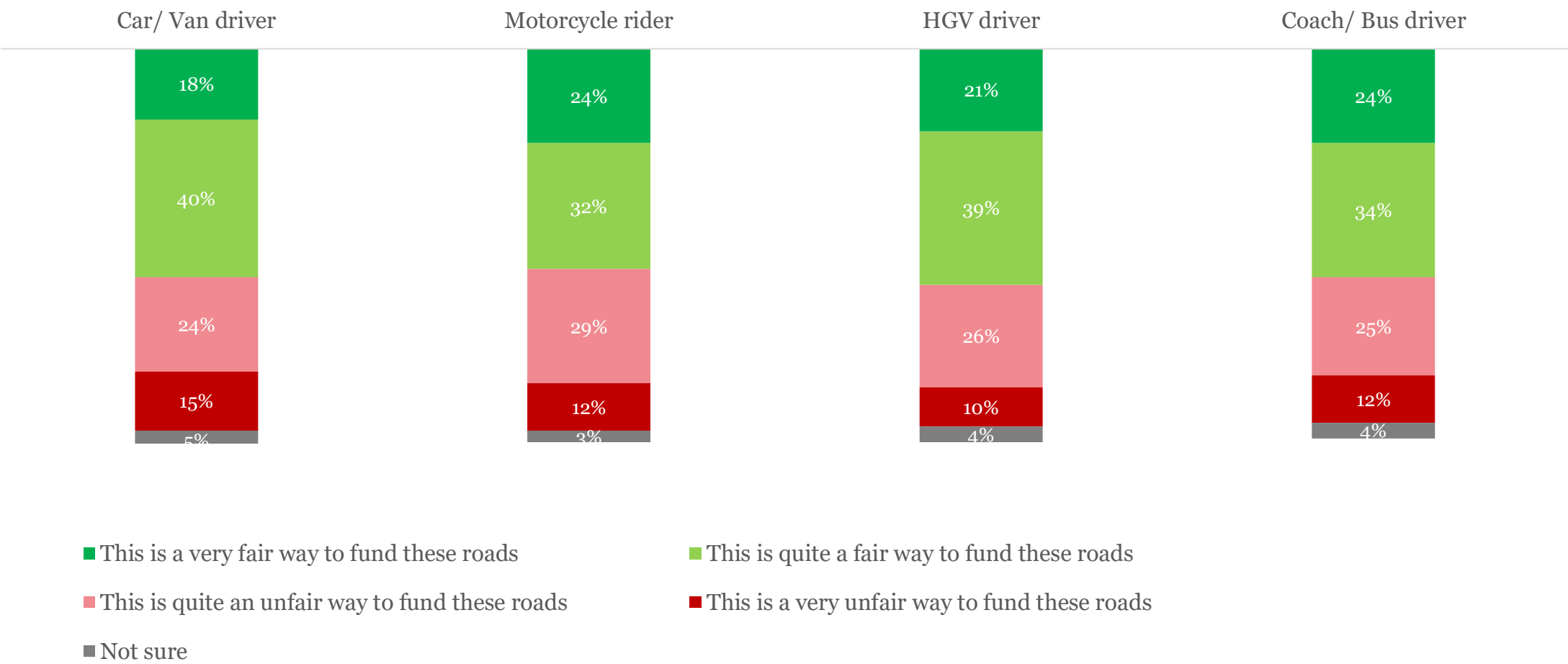
HGV and coach/ bus drivers are slightly more likely to say mileage charges are fair compared to car/ van drivers/ motorcyclists

Road Funding - A mileage charge for cars based on use, regardless of which roads are used (using GPS technology to record the distance travelled)



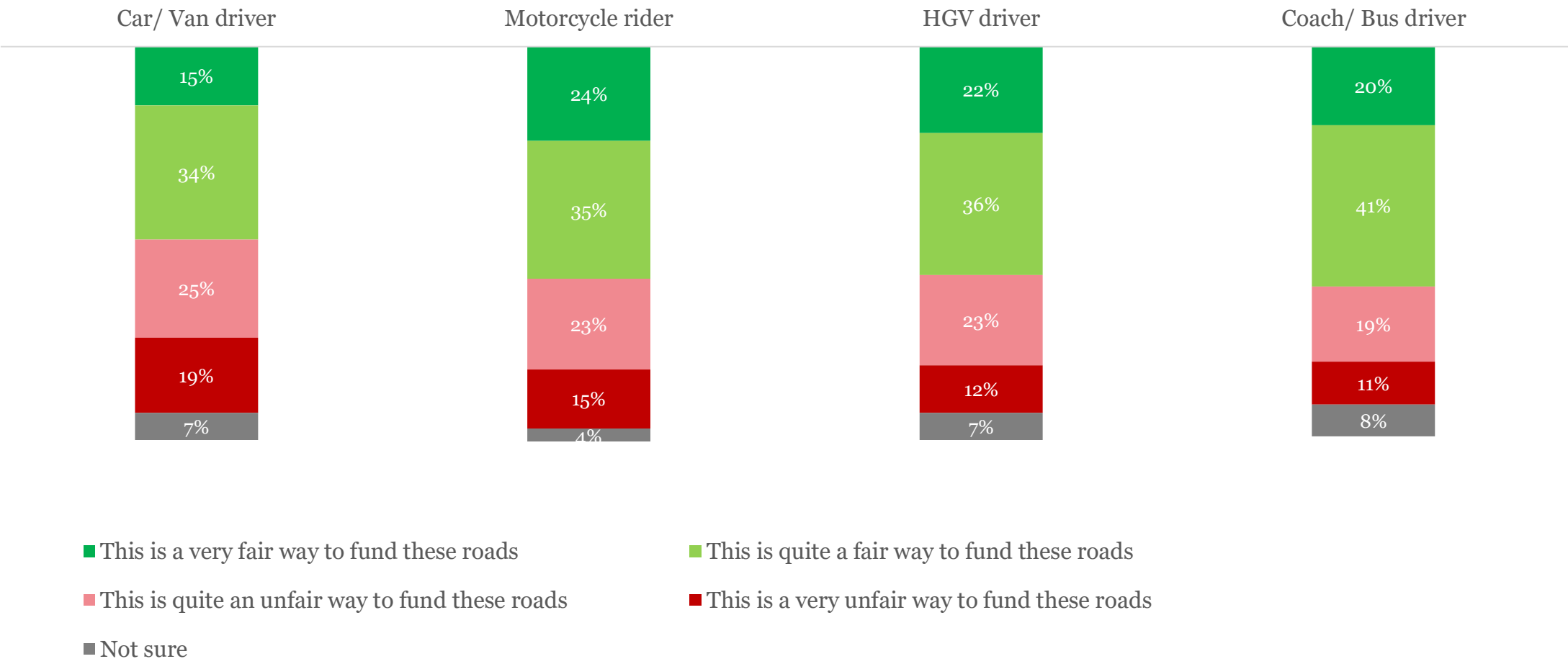
The majority of users feel taxes on petrol/ diesel are a fair way of funding the SRN

Road Funding - Via taxes on petrol/ diesel



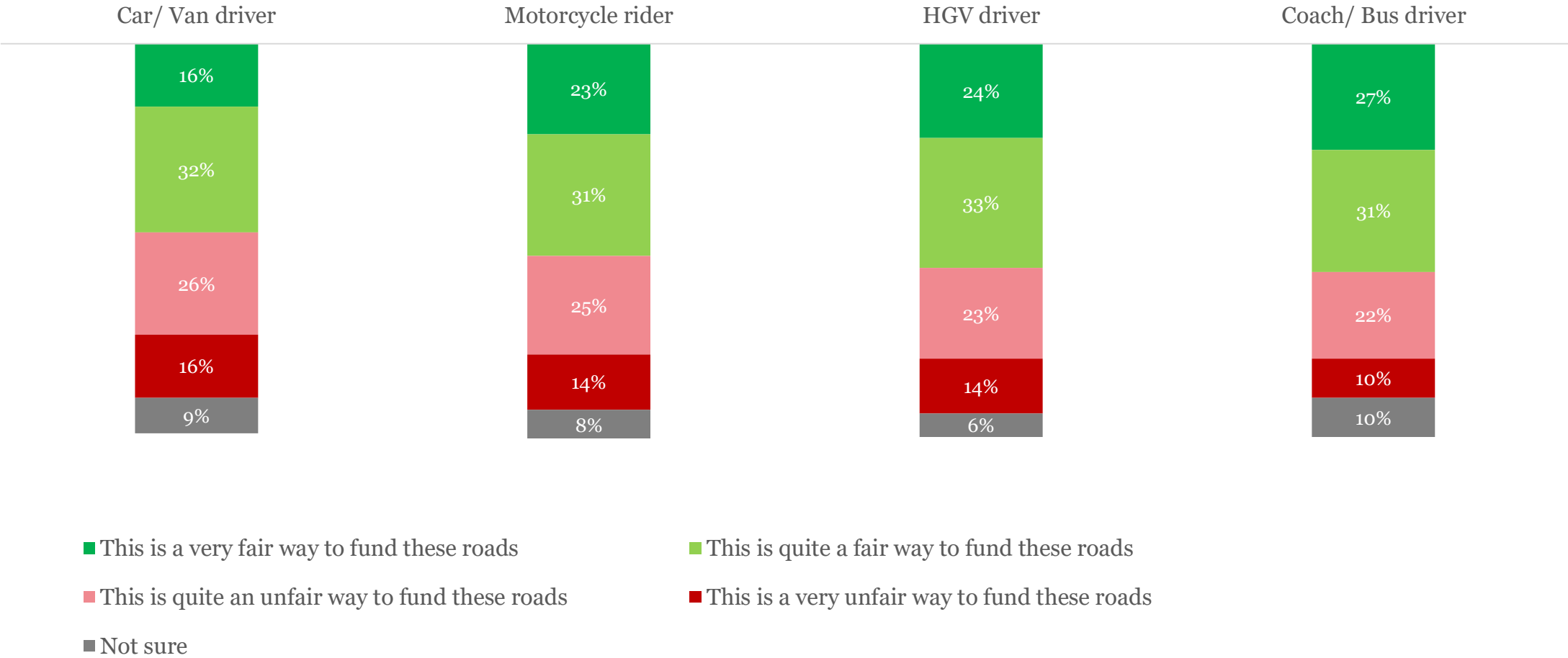
44% of car/ van drivers do not think income taxes are a fair way to fund the SRN

Road Funding - Via general income taxes



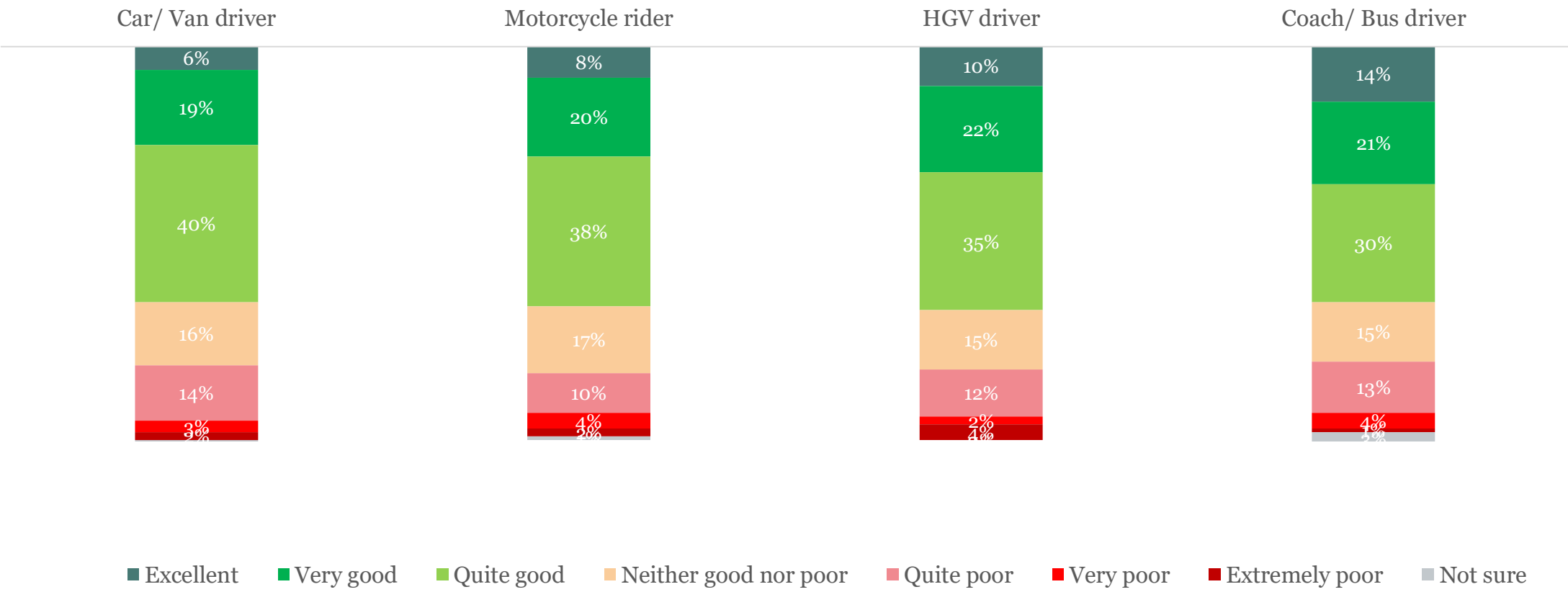
Car/ van drivers (which includes some drivers of electric vehicles) are less likely than other users to feel taxing electricity is a fair way to fund the SRN

Road Funding - Via tax on electricity use because of the growth in electric vehicles

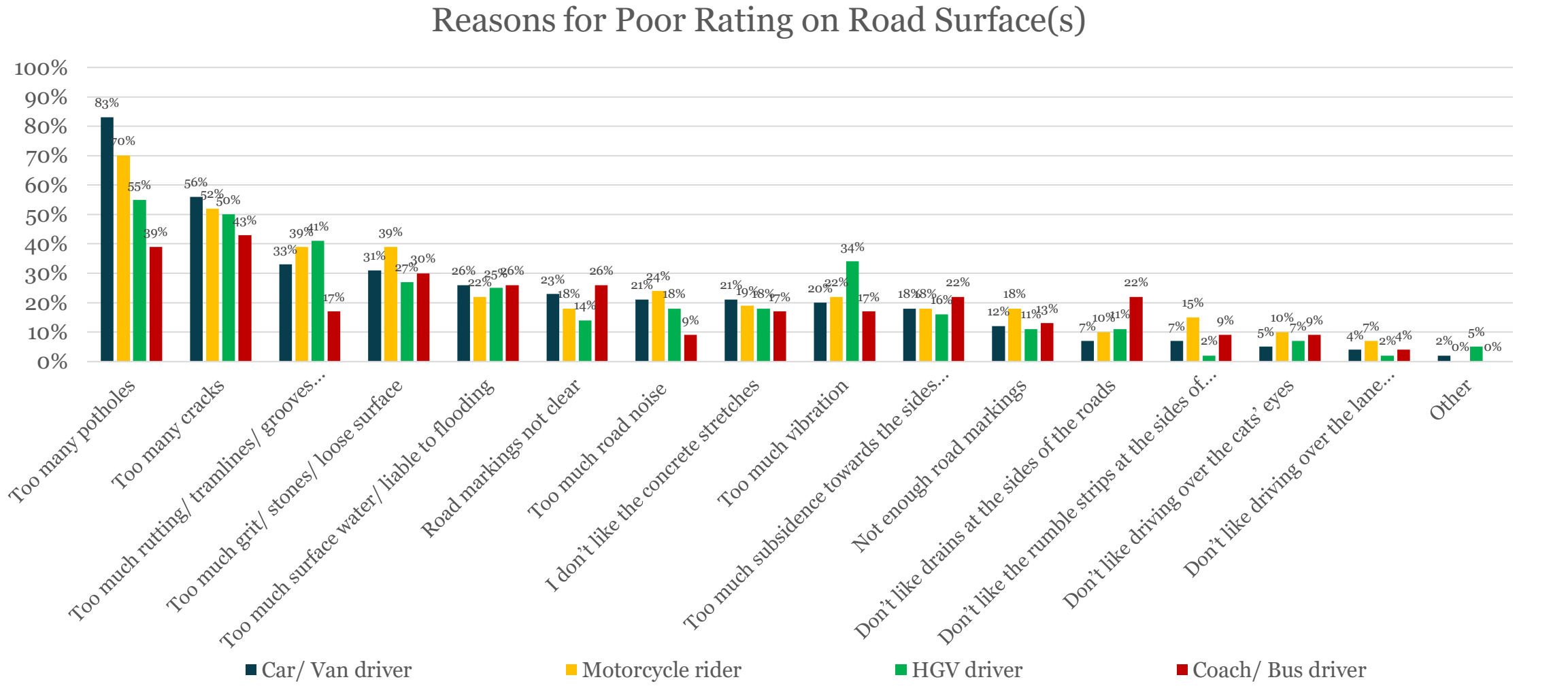


Coach/ bus drivers are more likely to rate the quality of road surfaces as excellent/ very good than car/ van drivers

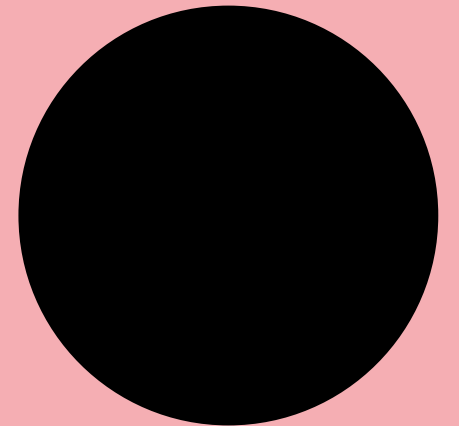
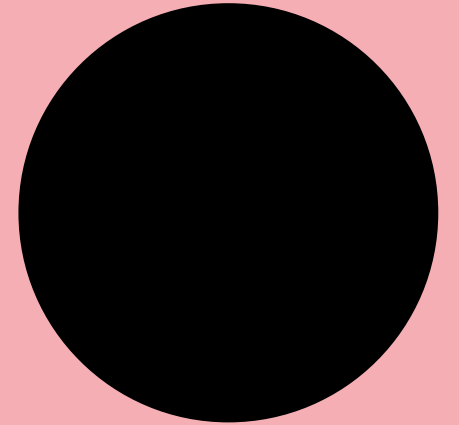
Quality of the Road Surface on England’s Motorways & A Roads



Motorcyclists are more concerned about grit/ stones/ loose surfaces than other users whilst HGV drivers are more likely to comment on too much vibration.

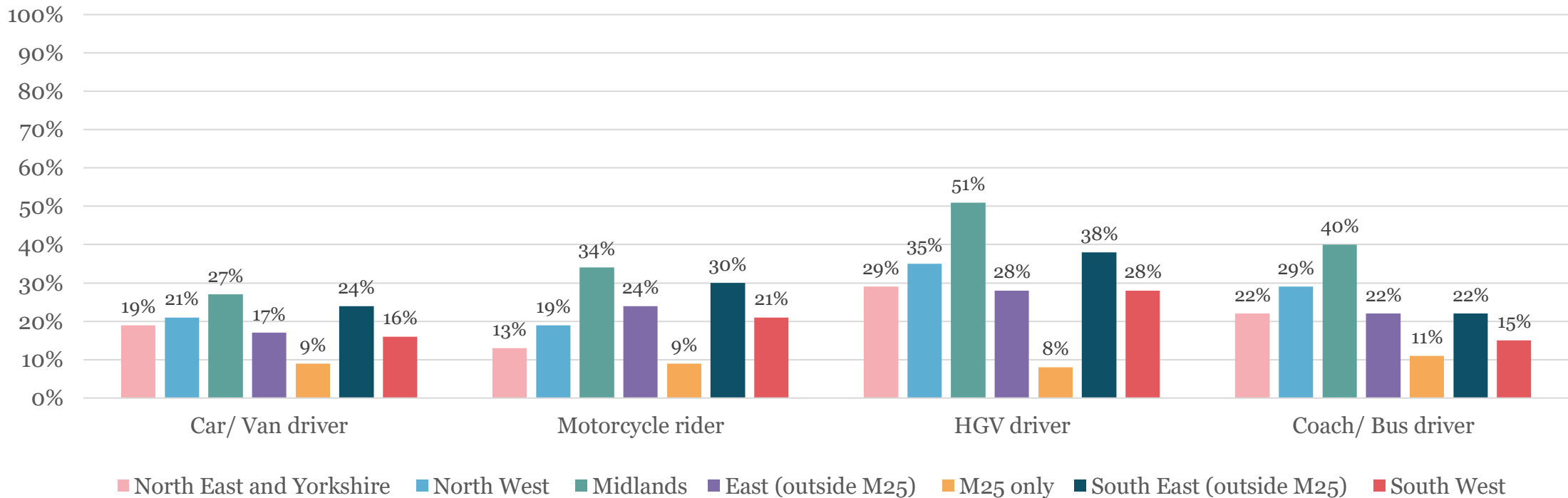


Respondent Classification



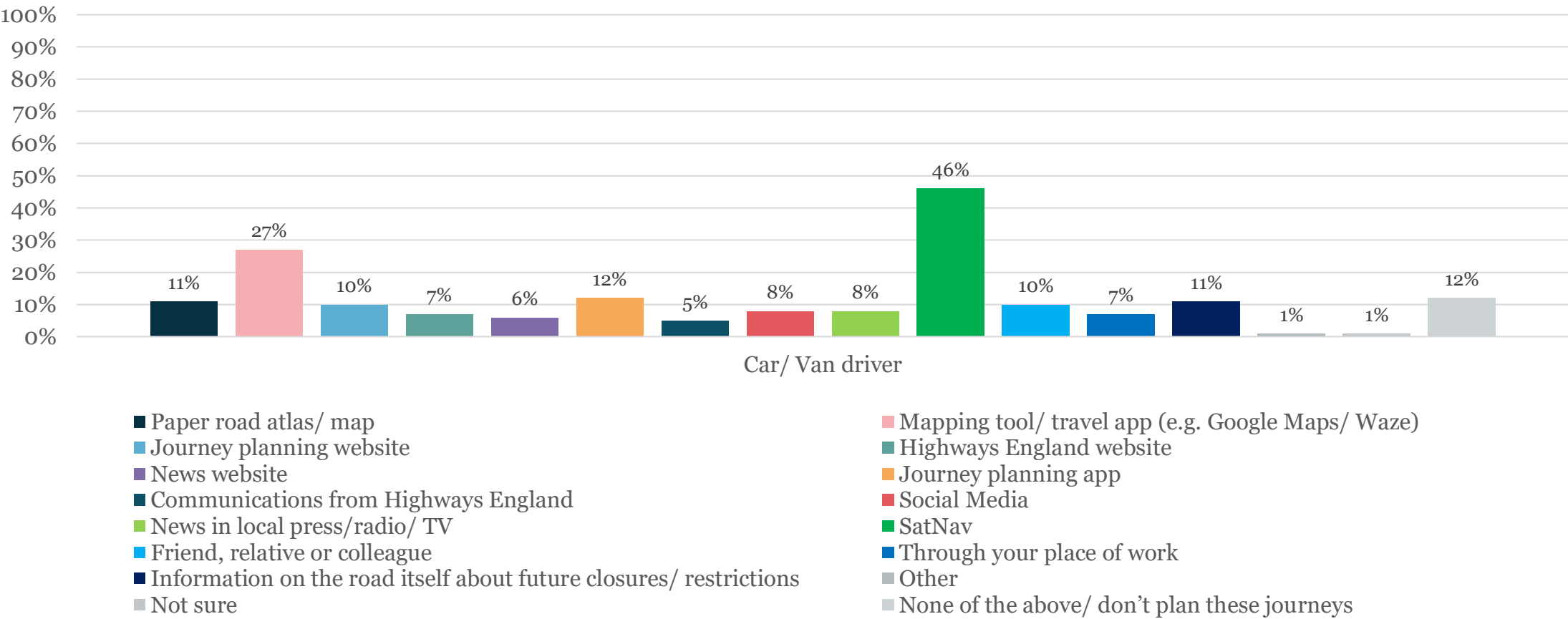
Just over half of HGV drivers say they make at least part of their typical SRN journeys in the Midlands.

Typical journeys undertaken



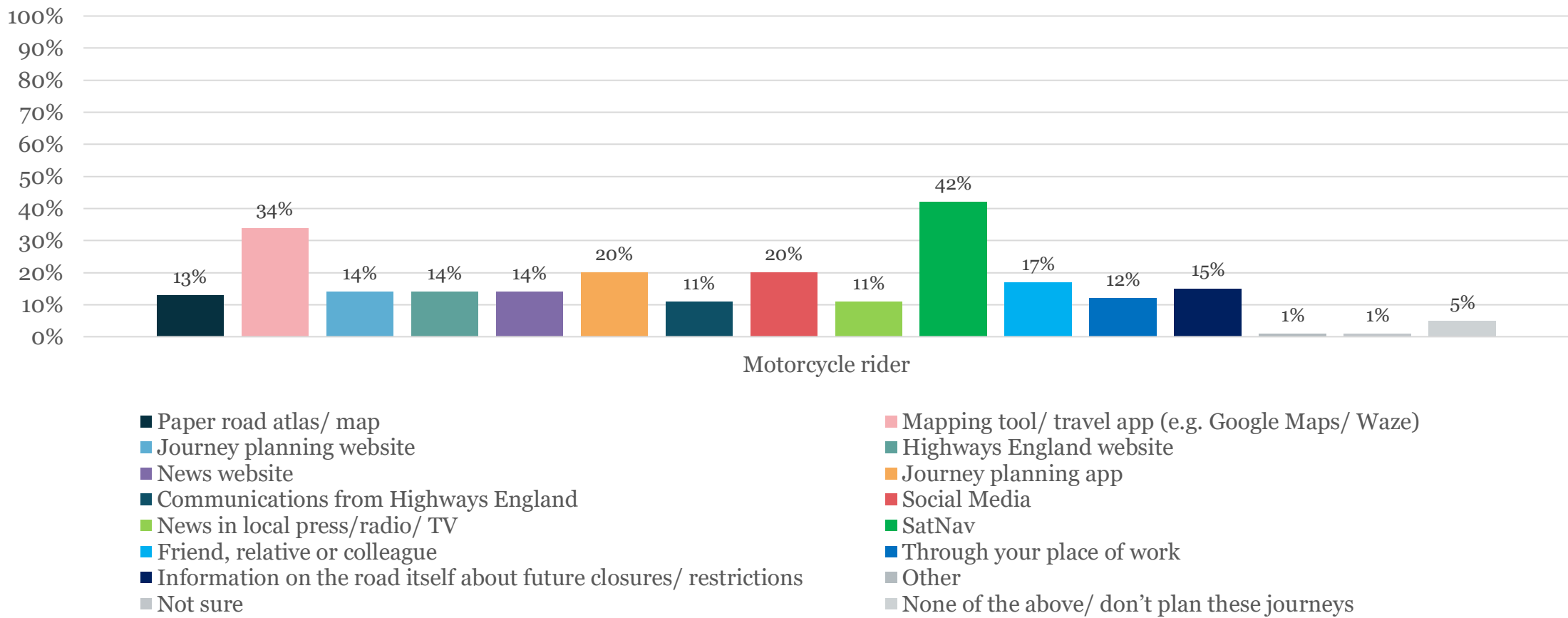
Almost half of all car/ van drivers use a SatNav to help plan their journeys, a quarter use online mapping tools/ apps.

Tools Used for Journey Planning – Car/ Van Drivers



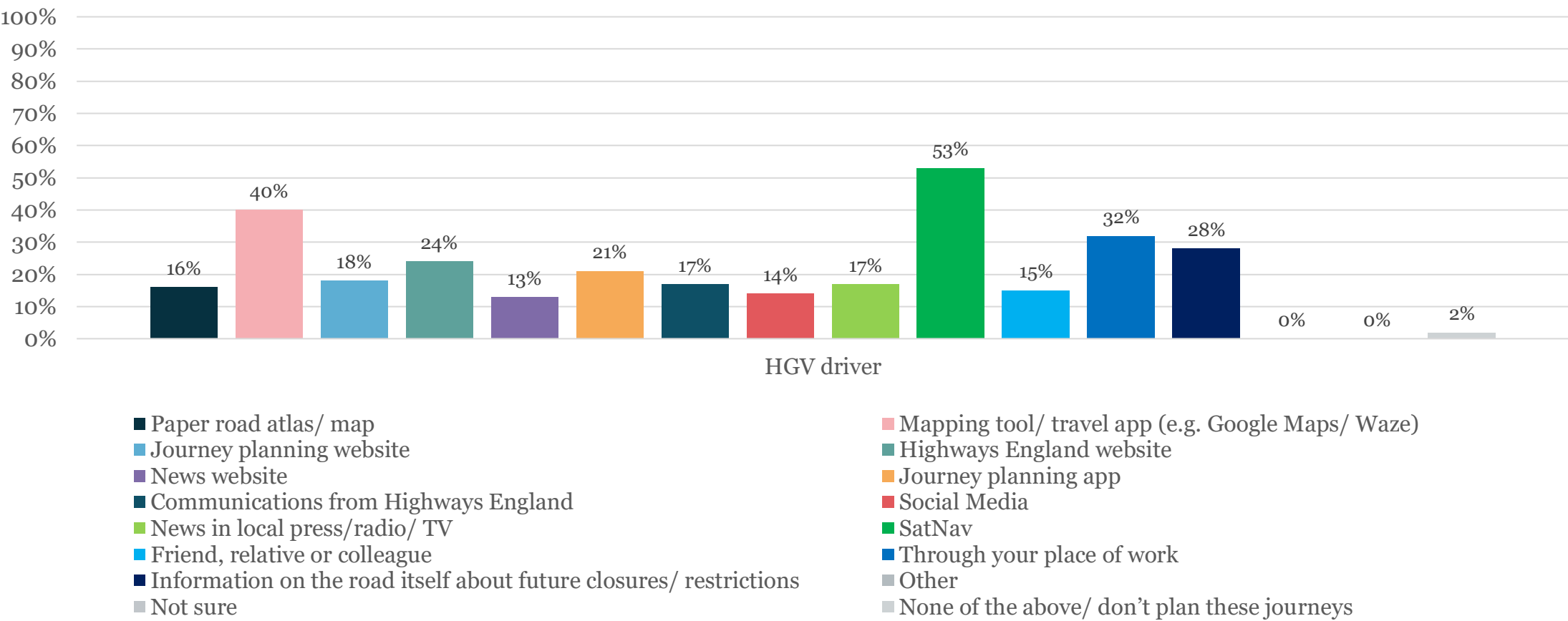
Whilst SatNavs are also widely used by motorcyclists, a third also use mapping tools/ travel apps.

Tools Used for Journey Planning – Motorcycle/ Moped Riders



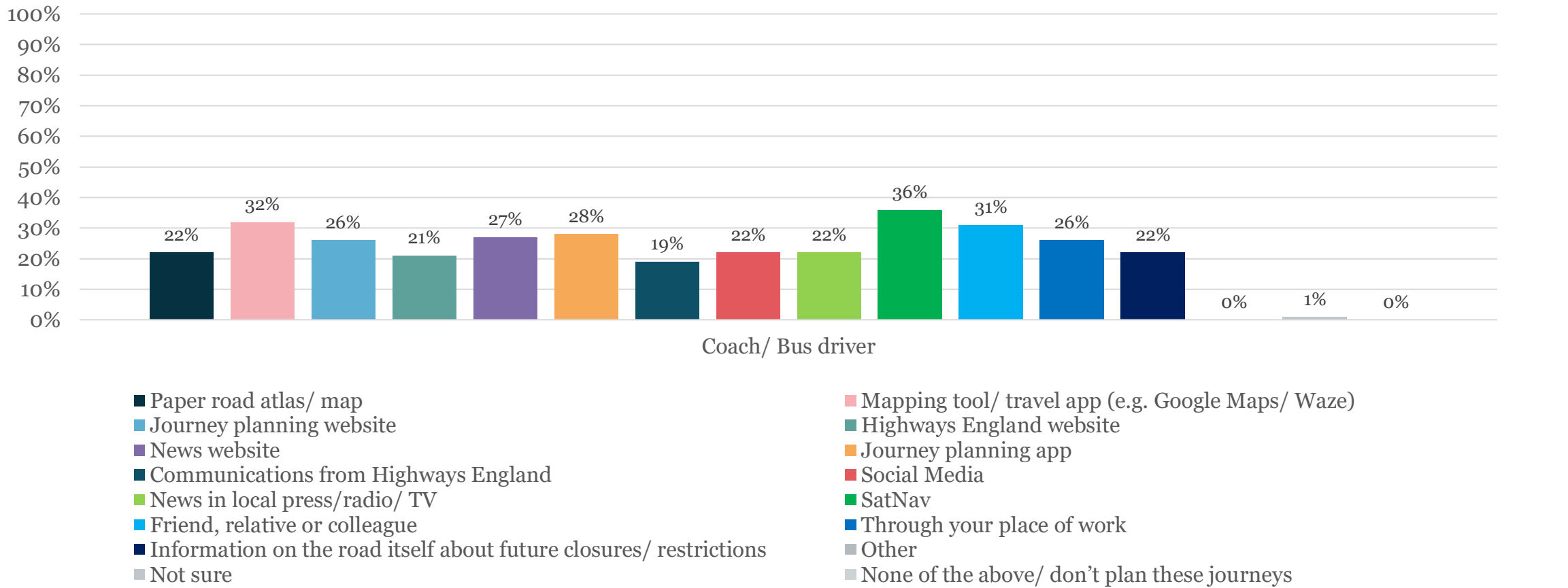
As seen with other users SatNavs and mapping tools/ apps are the most frequently used methods by HGV drivers. However, they also make use of work colleagues and information seen on the roads themselves.

Tools Used for Journey Planning – HGV/ LGV Drivers

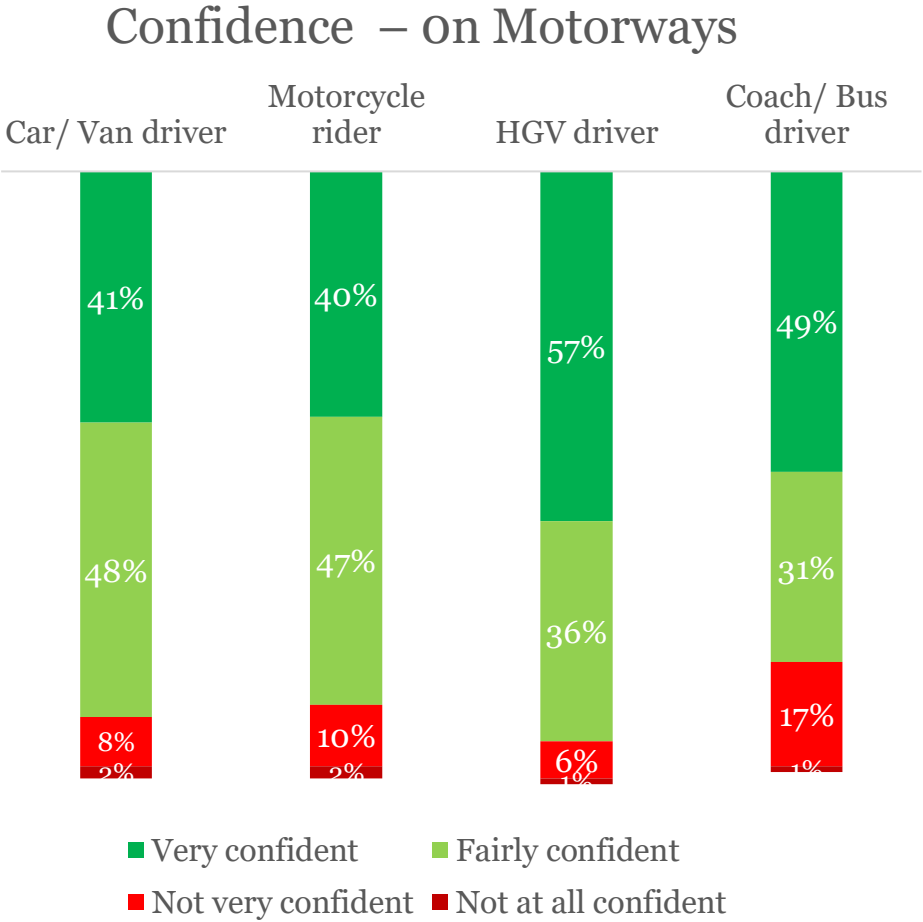


Coach/ bus drivers use a wide variety of sources of information

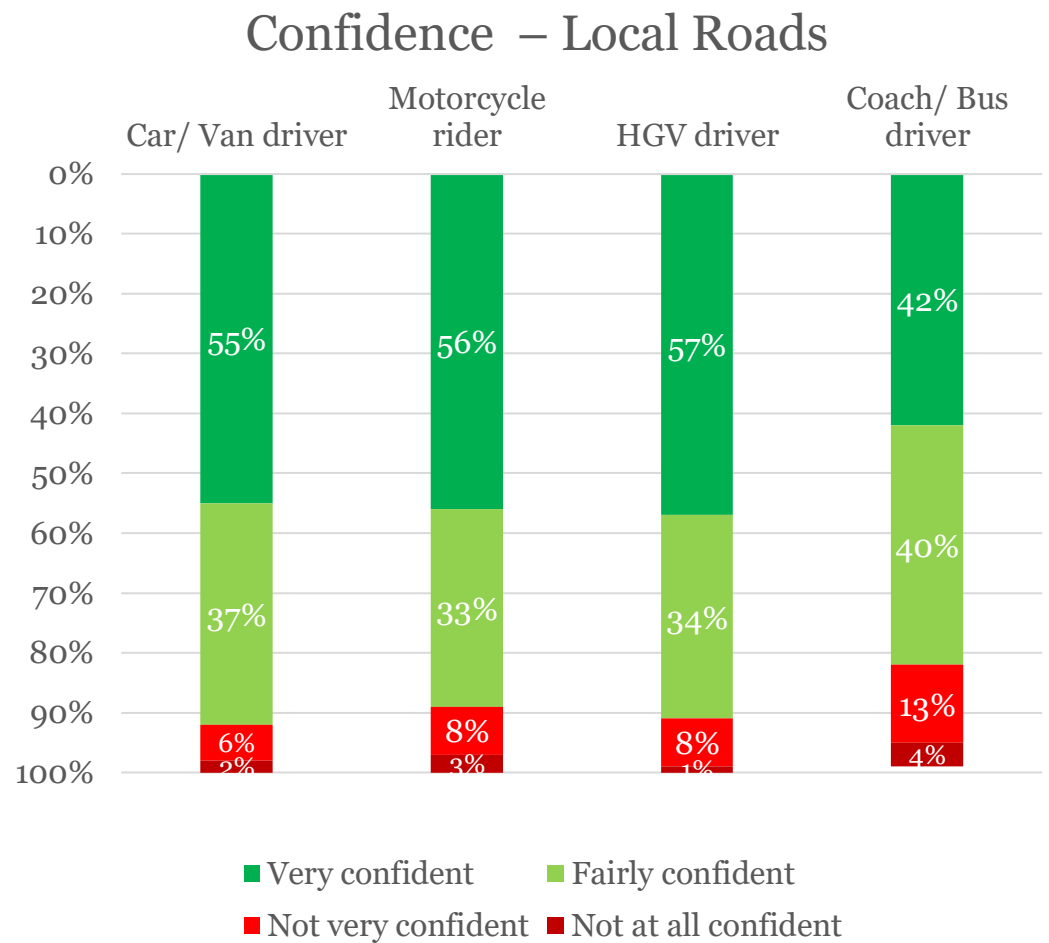
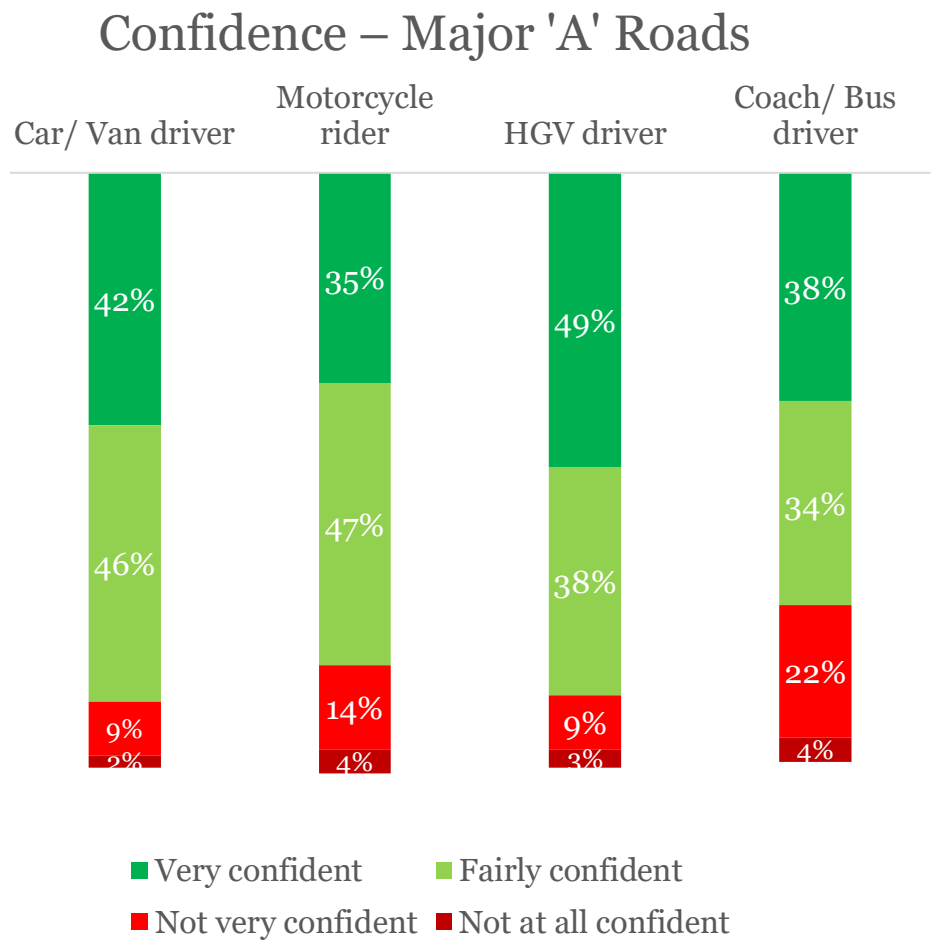
Tools Used for Journey Planning – Coach/ Bus Drivers



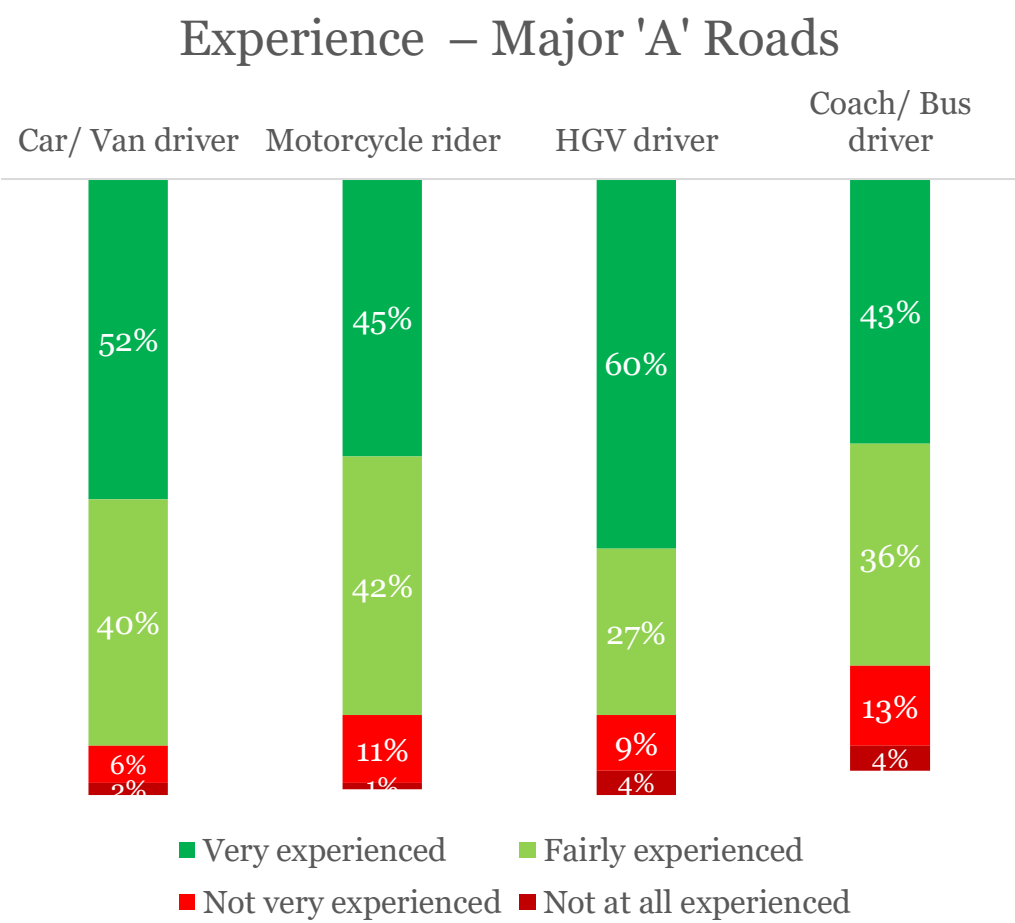
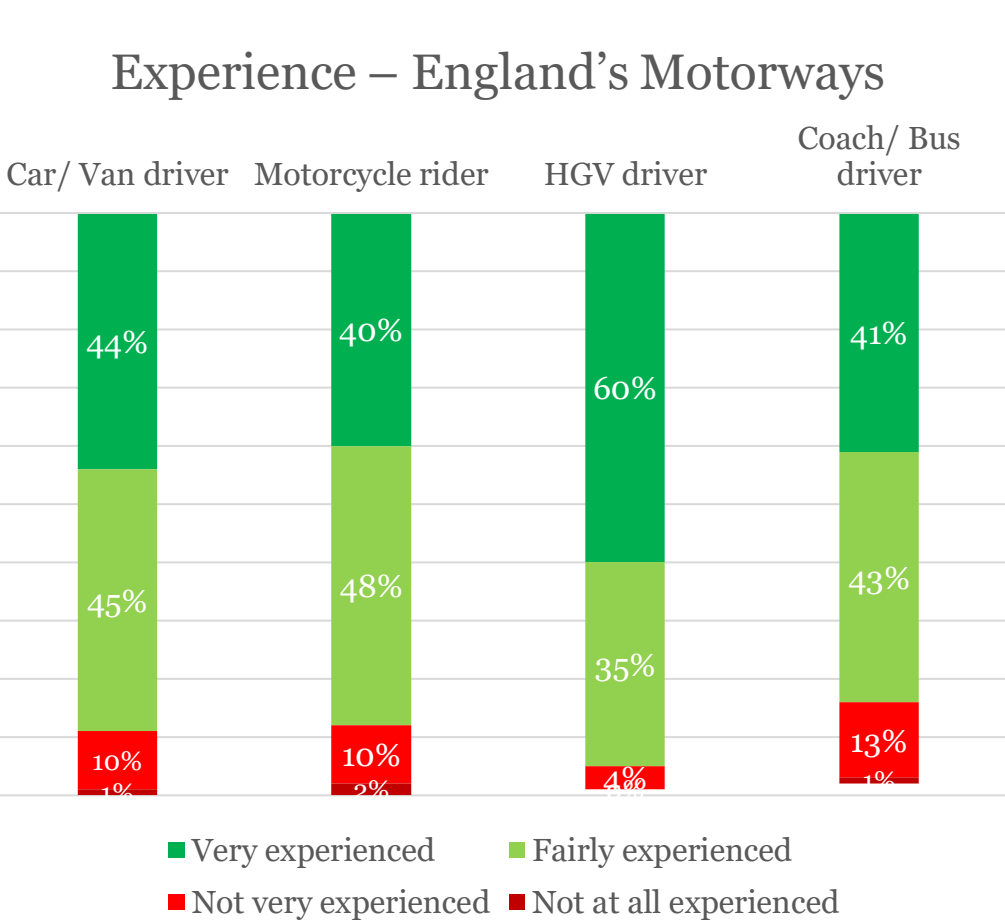
HGV drivers are the most confident users of Motorways



Whilst HGV drivers are also the most confident users of major 'A' roads, it is interesting to note that car/ van drivers and motorcyclists confidence rises to the same levels as HGV drivers on local roads.

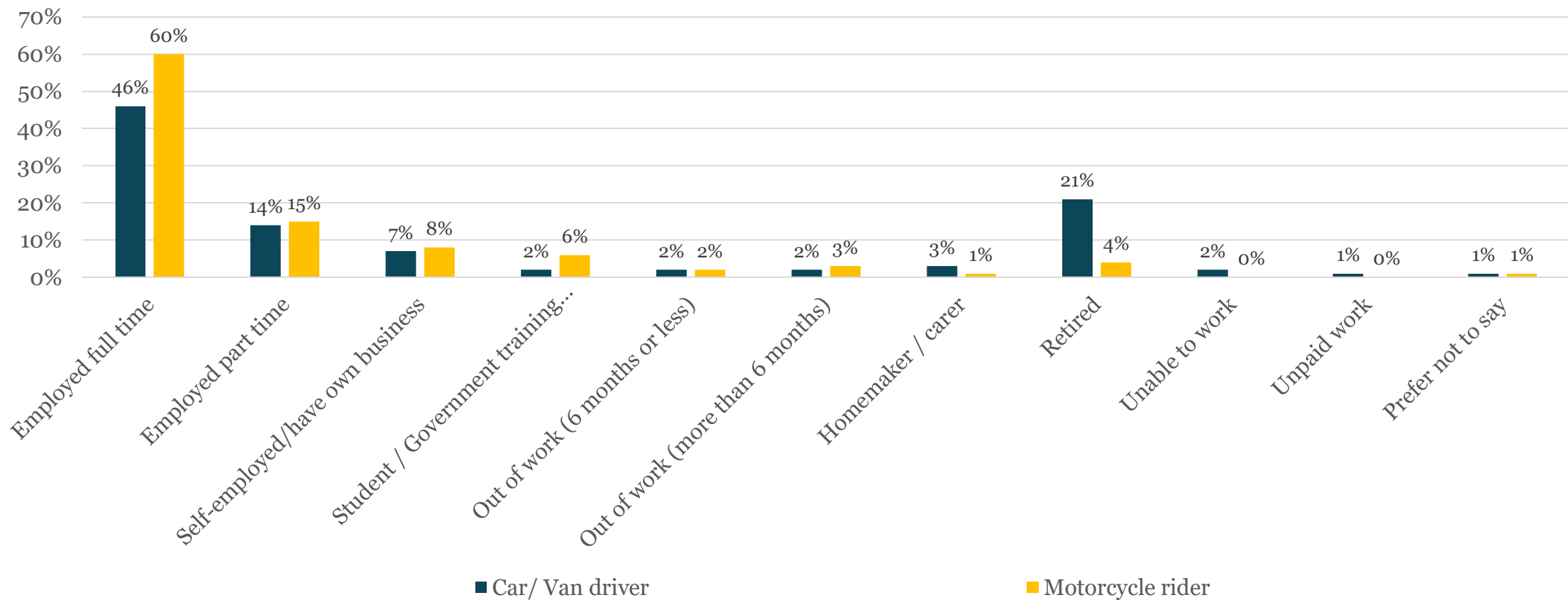


Whilst there remain some levels of inexperience across all groups, HGV drivers are the segment most likely to say they are very experienced users of Motorways and Major 'A' Roads



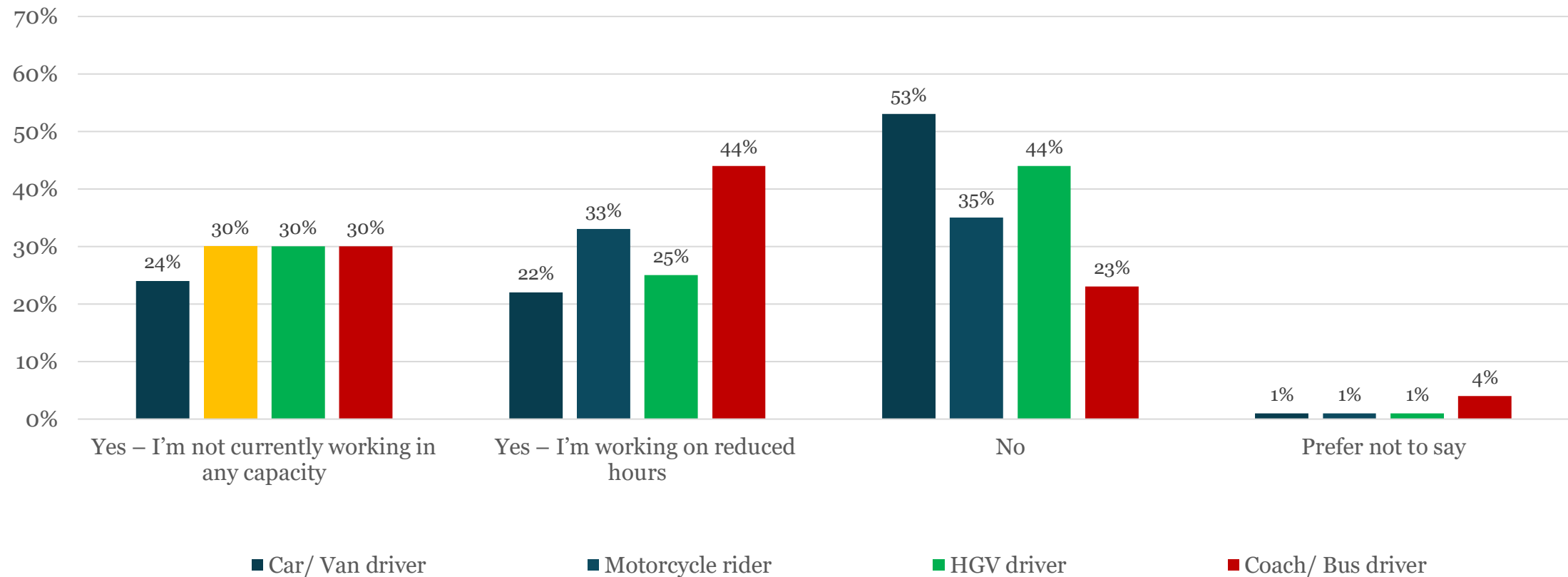
Motorcycle riders show high levels of full-time employment (this is largely accounted for by a much smaller proportion being retired compared with car/ van drivers)

Current Employment Status



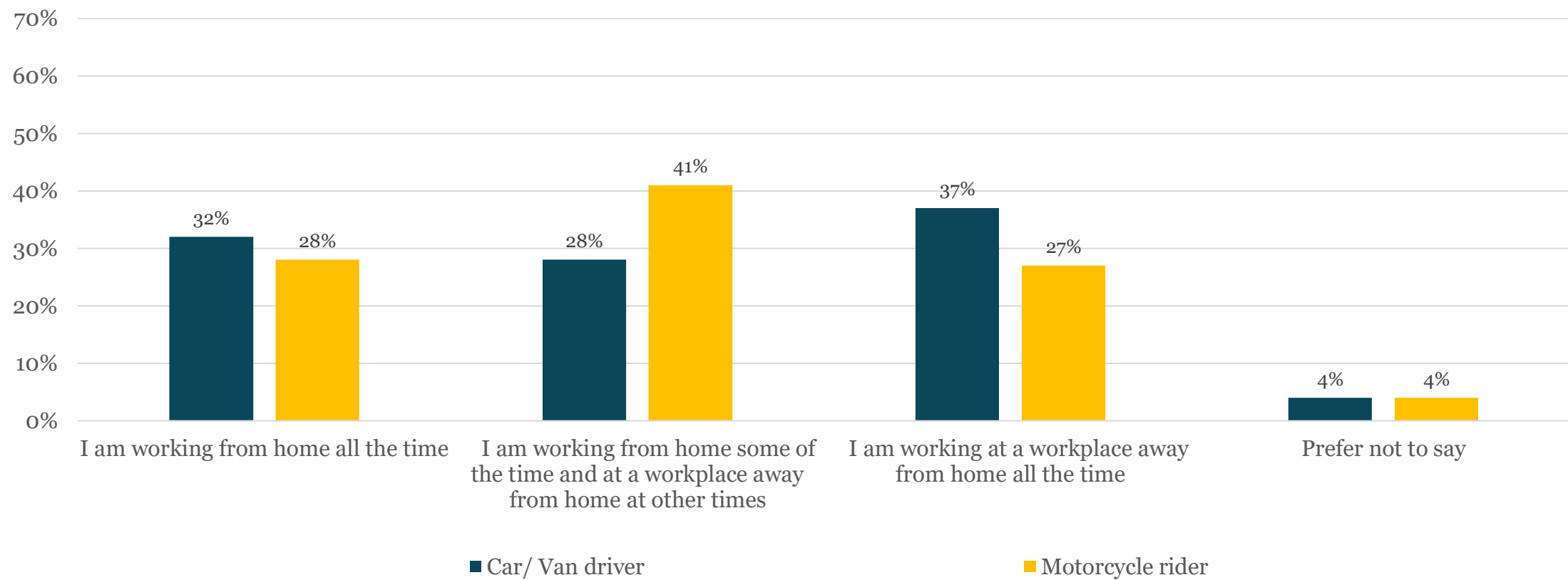
At the time of this research, three-quarters of coach/ bus drivers were either on furlough or working reduced hours

Currently Part of the Government Furlough/Job Retention Scheme



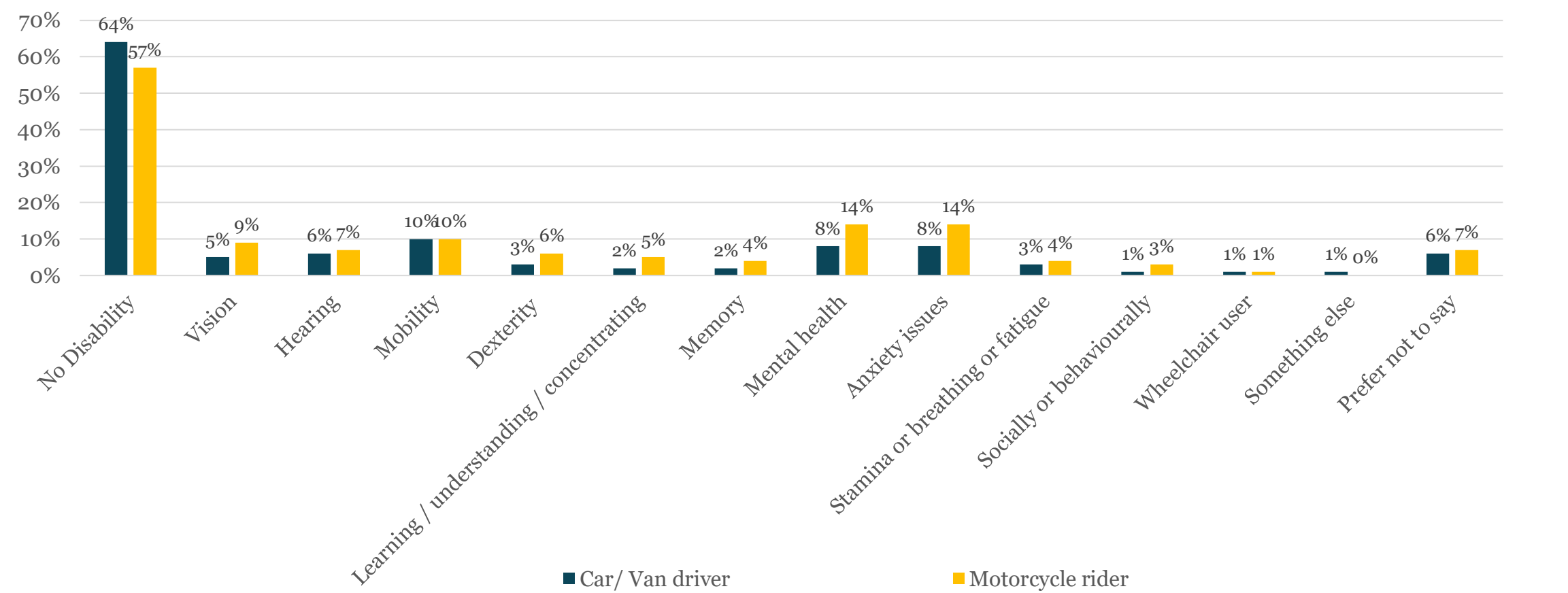
The majority of car/ van drivers and motorcyclists were working from home at least some of the time

Current Working Situation

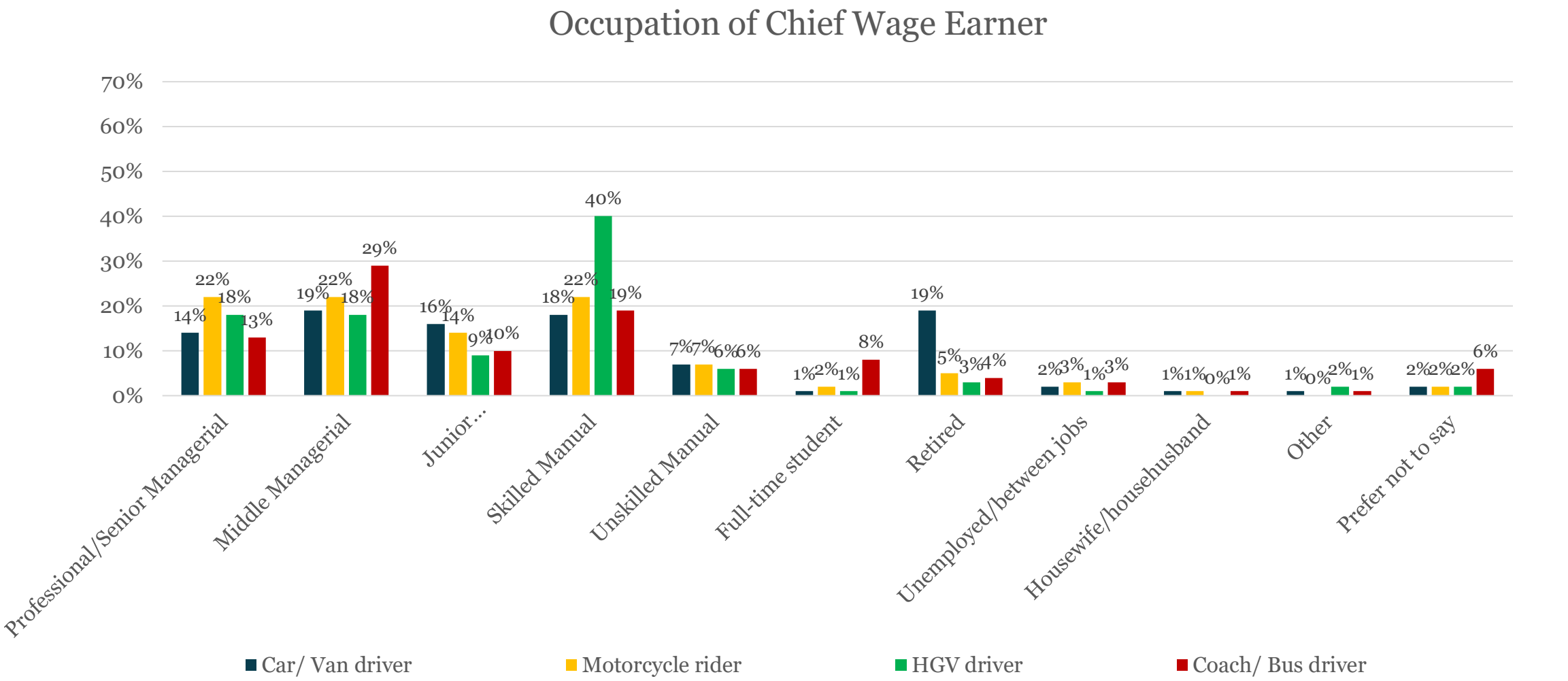


There are a range of disabilities amongst respondents, the number with mental health/ anxiety issues is particularly worth noting

Physical & Mental Impairments

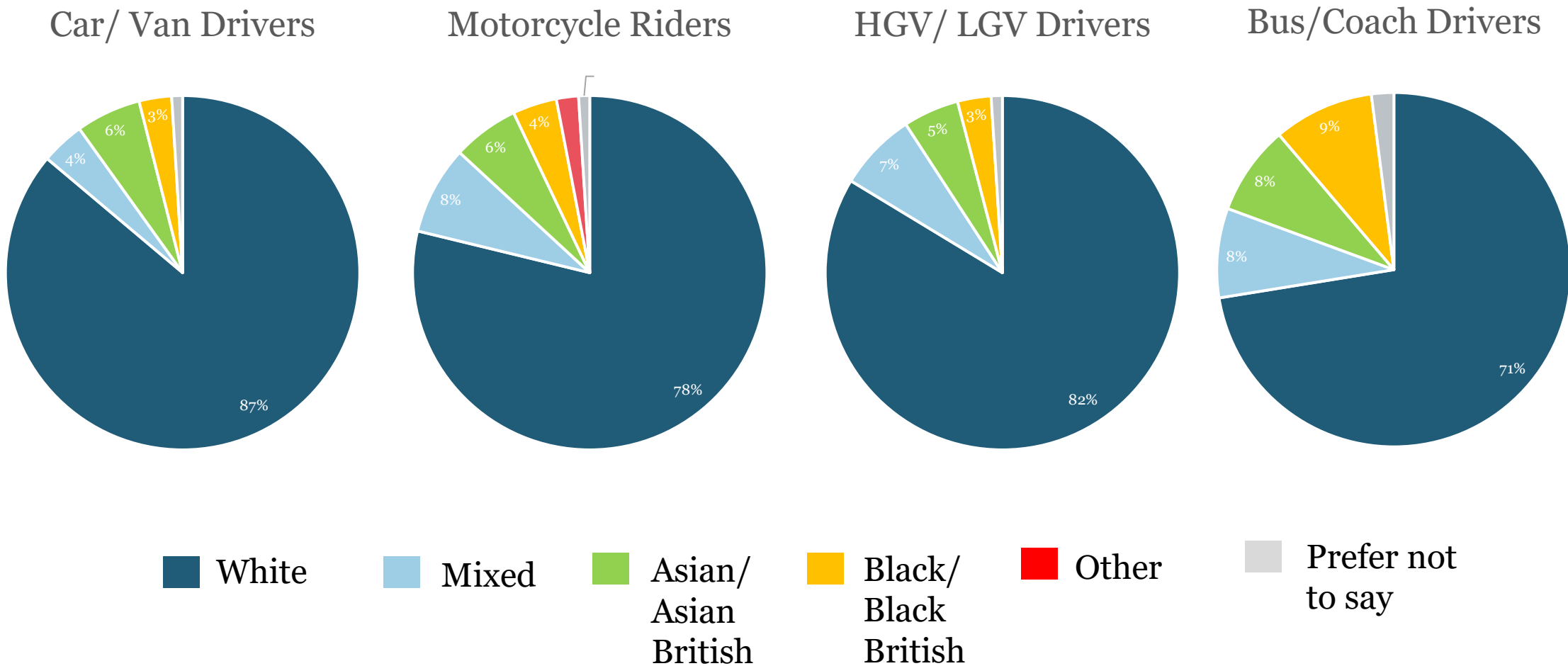


Occupation of chief wage earner

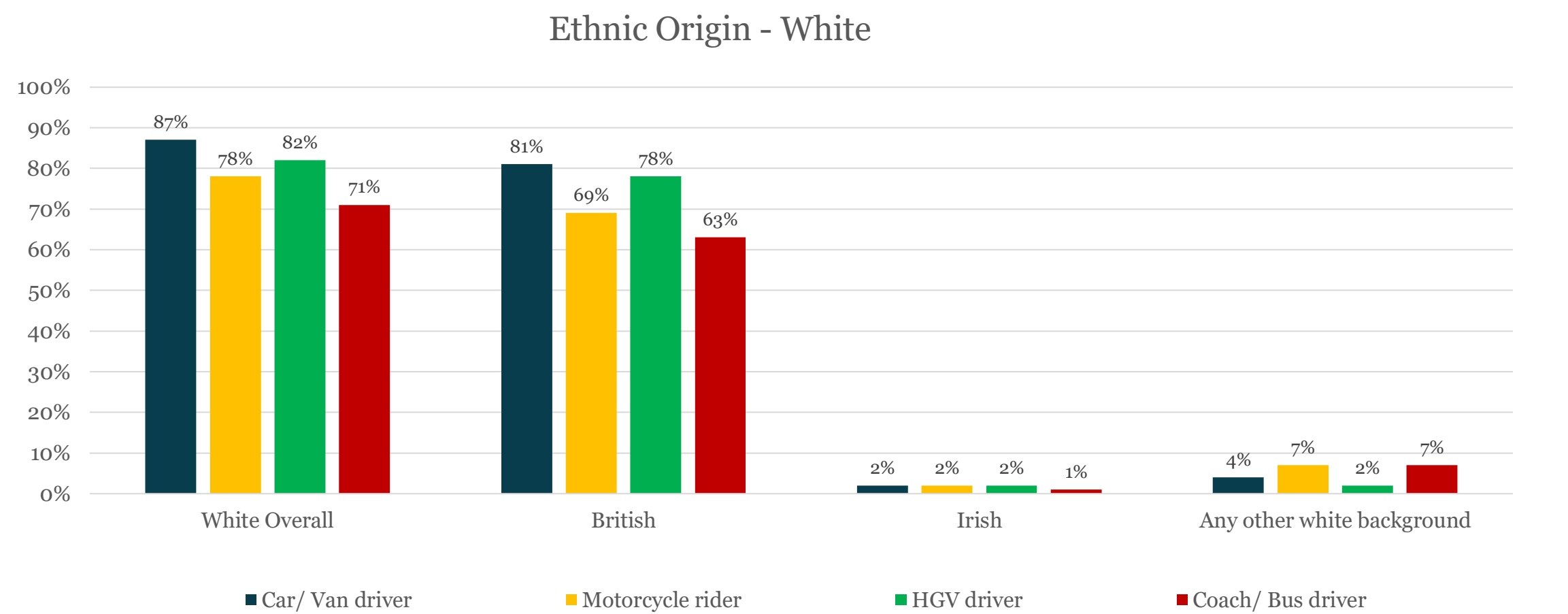


Coach/ bus drivers have a greater ethnic diversity within our sample than other SRN users

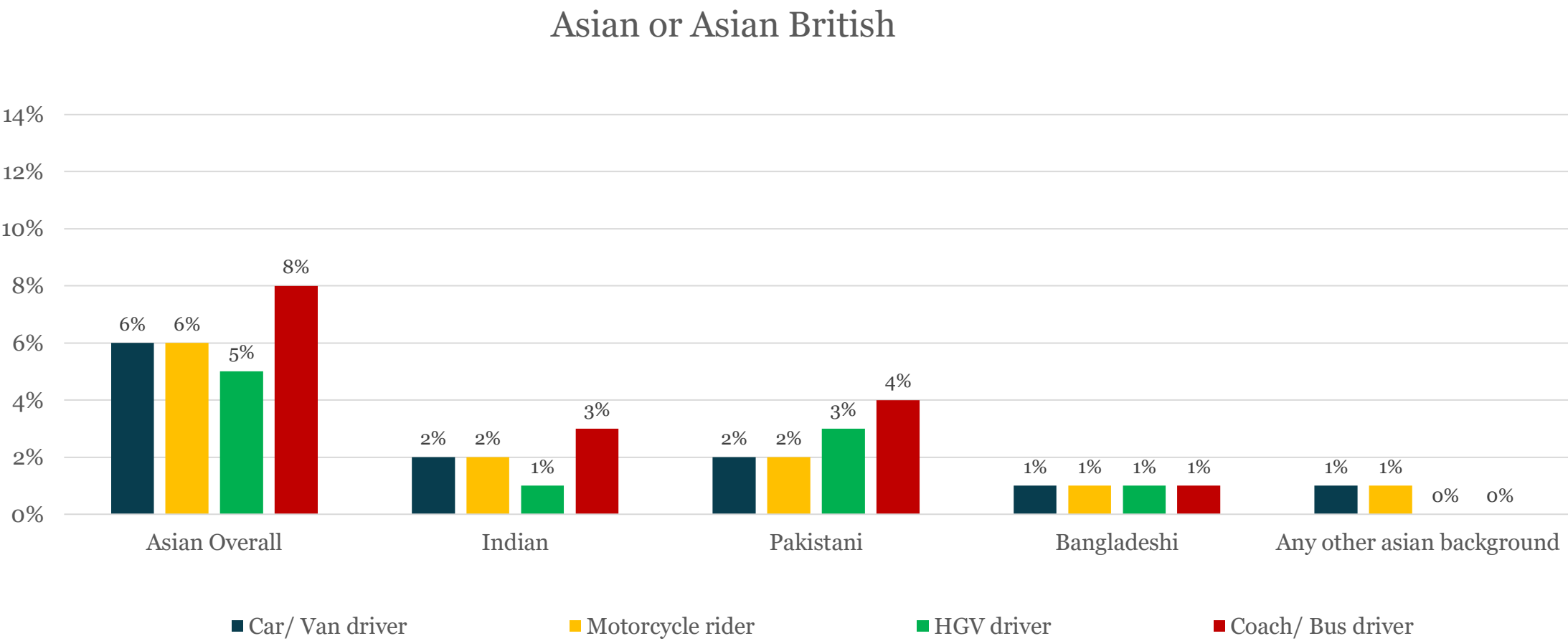
Ethnic Origin Summary



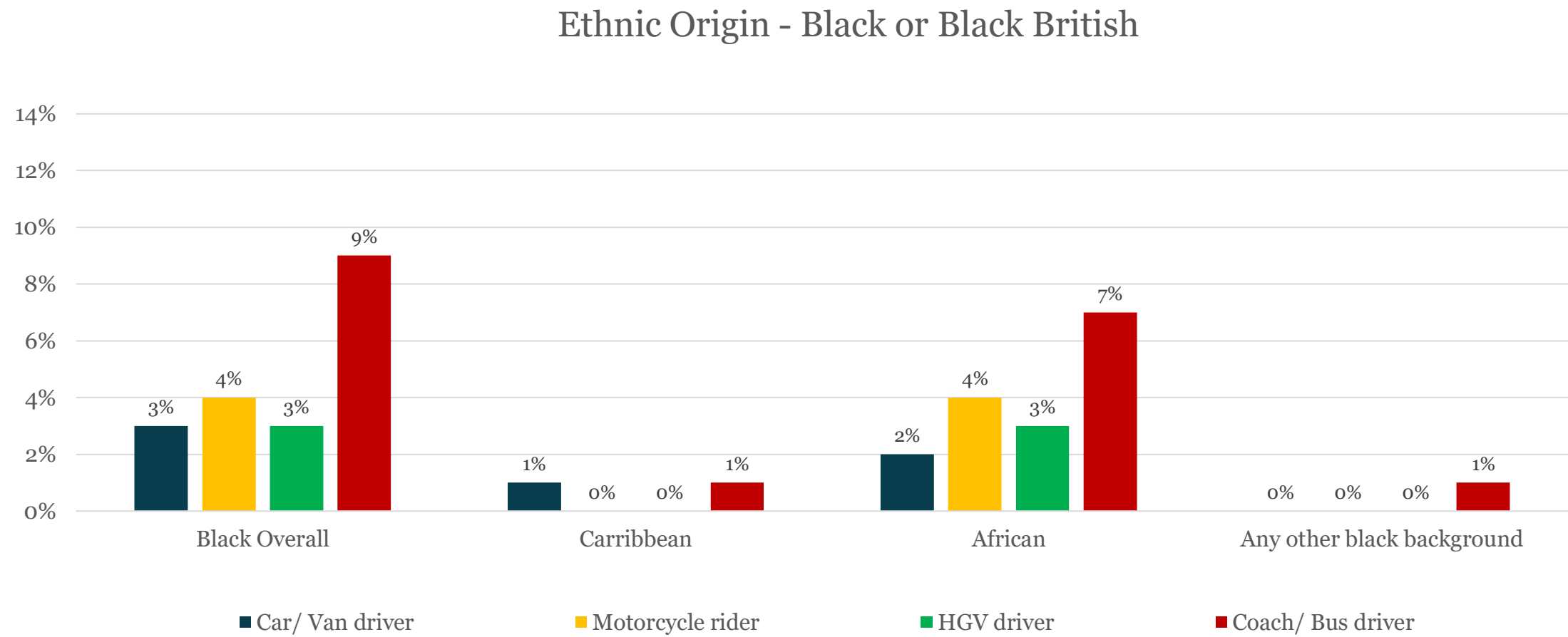
Ethnic origin



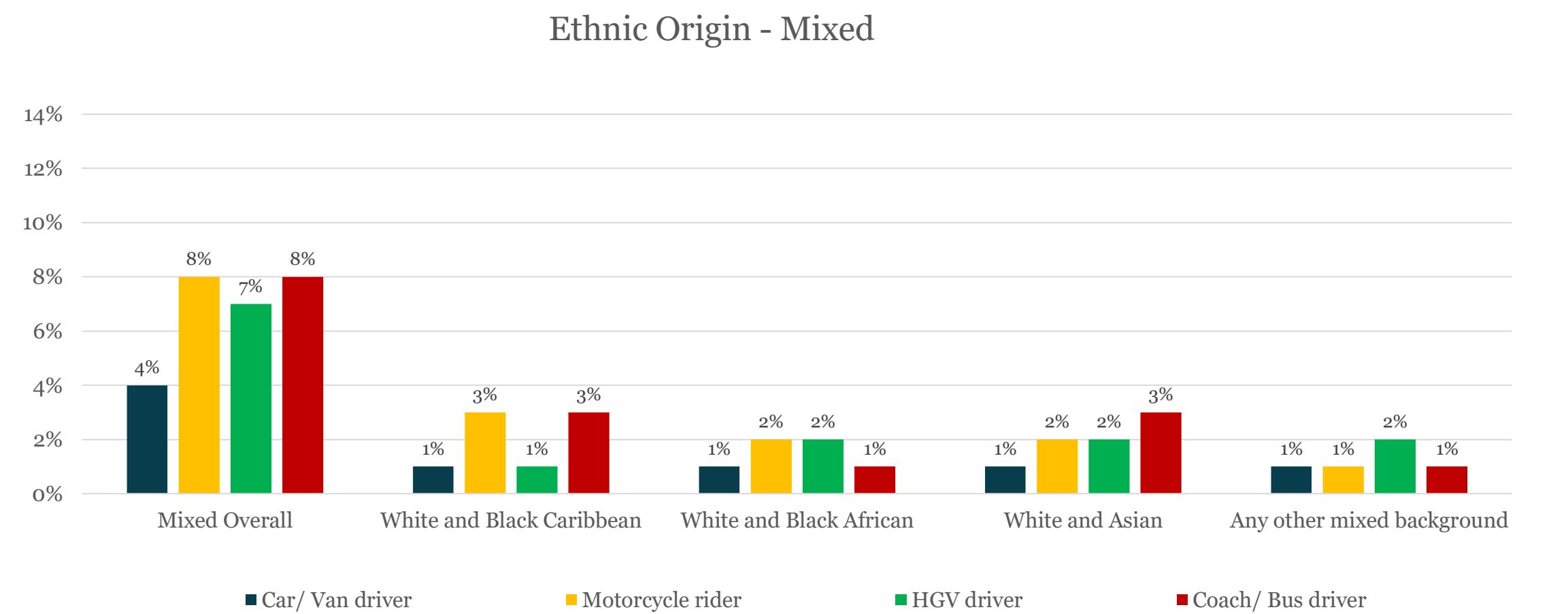
Ethnic origin (cont.)



Ethnic origin (cont.)



Ethnic origin (cont.)



Ethnic origin (cont.)

