# **Transport Focus**

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







## 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
Ways of reducing journey times
Main causes of stress on the SRN

Attitudes towards road surfaces

Use of the SRN by cyclists, pedestrians and equestrians

Sources of funding for the SRN

**Perceptions of Highways England** 

# Methodology (i)

The survey was conducted online from the  $10^{th} - 26^{th}$  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 = <b>4</b> , <b>828</b>
Motorcycle/ moped riders	target = 350	achieved = <b>40</b> 7
HGV/ LGV drivers	target = 250	achieved = <b>249</b>
Coach/ bus drivers	target = 100	achieved = <b>134</b>
Plug in electric car/ van drivers	target = 100	achieved = <b>203</b> *

# 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







8 Q50. How would you describe yourself? Q51. Which of these age bands do you fall into? Base: Main drivers: Car/ Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)

# 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



- I make short trips, of less than 10 miles
- I make trips of more than 30 miles

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■ I make trips, of around 10 to 30 miles

It varies but I tend to make short trips, of less than 10 miles

It varies but I tend to make longer trips, of more than 10 miles

Q13. Thinking about your typical journey on England's motorways and major 'A' roads, which of these statements best describes the length of journey on these specific roads? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)

# 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

Reason for Travel



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# **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 particularly 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





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: Car (4818)

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

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

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

#### 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



Q26. Overall, how do you think that Highways England could improve the experience of travelling on England's motorways and major 'A' roads for you? Base: Main Driver: Car/Van (4818);

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# 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



Q45. Why do you say the quality of road surface on England's motorways and major 'A' roads is poor? Base: Those rating as poor: Main Drivers: Car/Van (886)

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# 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



Q28. Below are a couple of statements relating to England's motorways and major 'A' roads. Can you please tell us how much you agree or disagree with each of

22 these

Base: Main Drivers: Car/Van (4818);

# 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



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

23 build new motorways/ major 'A' roads or to add new lanes to the existing roads Base: Main Drivers: Car/Van (4818);

# 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





importance rating

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.

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: Plug in Electric Car/ Van (203)



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

#### **Highest priority for improvement – Motorcycle Riders**



importance rating

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: Motorcycle (407)



### **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**



importance rating

82

165

145

138

126

113

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. 26 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** 

150

127



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. 27 Base: Main Driver: Coach/Bus (134)



### 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**

30 Classification: Private



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



■ Quite likely ■ Very likely

<sup>31</sup> 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



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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)

Effect of the Law Change on Likelihood to Purchase an Electric Vehicle



■ Yes, a little more likely ■ Yes, much more likely

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

All respondents Plug in electric (5628) (203)



■ Quite important ■ Very

t Very important

Q37. Given the phasing out of new petrol/diesel/hybrid cars and vans, how important do you think it is that there is investment in the following areas over the

34 next five years?

Base: All respondents (5628);

# 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



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

36 these you think would be most beneficial to you in terms of reducing journey times? Base: Main Drivers: Car/Van (4818)
### 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



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

37 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



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

38 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



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

39 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

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

### 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



Q32. Below are number of statements people have made relating to England's motorways and major 'A' roads, can you please tell us how much you agree or

43 disagree with each of these statements? Base: All respondents (5628)

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

Agreement with Statements - Overall



Q32. Below are number of statements people have made relating to England's motorways and major 'A' roads, can you please tell us how much you agree or

44 disagree with each of these statements? Base: All respondents (5628)



### How stressful driving can be





45 Classification: Private

# 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)





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 – Other Drivers



Q42. What do you find most stressful about driving on England's motorways and major 'A' roads? Base: Those that find driving stressful: Main Drivers: Car/Van (4158); Motorcycle (353); HGV (212); Coach/ Bus (113)

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# 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.)

#### Most Stressful Factors when driving – Other



Q42. What do you find most stressful about driving on England's motorways and major 'A' roads? Base: Those that find driving Stressful: Main Drivers: Car/Van (4158); Motorcycle (353); HGV (212); Coach/Bus (113)

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### Appendix





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50 Classification: Private

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### **Funding the SRN**



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#### 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



All car/ van Plug in electric

(203)

drivers (4818)

Quite fair

Very fair

Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if 52 you think this would be a fair or unfair way of funding the roads? Base: Main Drivers: Car/Van (4818)

## 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**







54 Classification: Private

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



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

Awareness of Highways England's Investment Plans



■ Don't know

Q39. And what, if anything, do you know about Highways England's investment plans for the future? Base: Those aware of Highways England: Main Drivers: Car/Van (4000); Motorcycle (317); HGV (214); Coach/Bus (103)

# 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



<sup>58</sup> Q40. As a user of England's motorways and major 'A' roads, please indicate how important each of the following factors is to you? Base: All Respondents (5628); Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)

### **Other findings/ data**

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### 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



- Have not used any in the past 6 months
- Not sure
- Both motorways and major 'A' roads
- Only major 'A' roads
- Only motorways

Roads used regularly Pre Covid-19



- Did not use any prior to March 2020
- Not sure
- Both motorways and major 'A' roads
- Only major 'A' roads
- Only motorways

Q2. Which of these types of roads on this map have you used in the past 6 months? Q3. Which of these types of roads on this map did you use regularly prior to Covid-19

61 restrictions coming in in March 2020?

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

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

Expected road usage Post Covid-19



62 Q4. And once Covid-19 restrictions are lifted, which of these types of roads on this map do you think you will use in the future? BASE: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)

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



#### Road usage During vs Pre Covid-19

#### Not sure

■ I use these roads less often than I did before

- My use is similar to what it was before
- I use these roads more often than I did before

Q9. Thinking about your use of the roads on this map over the last six months, which of the statements below best describes your use in this period compared to your use prior to March 2020 Q10. Thinking about after Covid-19 restrictions are lifted, would you expect to be using the roads on this map as often as you did prior to March 2020 or as you

63 have been over the past 6 months? Base: Q9 Those using in the past 6 months Car/Van (4558); Motorcycle (396); HGV (240); Coach/Bus (129) Q10 Those with a different usage to pre-Covid Car/Van (3538); Motorcycle (256); HGV (116); Coach/Bus (85)



#### Road usage Post Covid-19

■ Not sure/ is not likely to be like either

• My use in the future will be more like before March 2020

• My use in the future will be similar to 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

Once a week

Once a month

Don't know

Less than once a week but more than once a month

Less than once a month

Q11. Thinking about your use prior to March 2020 how frequently did you tend to drive on / Thinking about your use over the past six months how frequently do you

64 tend to drive on any of the motorways and major 'A' roads listed previously? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)

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

Expected Frequency of Travel



Q14. Thinking about your typical journey, how often would you expect to do this after Covid-19 restrictions have ended? 65

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

# 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

100% 8% 90% 13% 80% 24% 44% 70% 10% 60% 13% 50% 16% 15% 40% 11% 30% 20% 20% 8% 14% 12% 10% 5% 0% Car/Van driver Motorcycle HGV driver Coach/Bus rider driver Less than 2,500 2,500 - 4,9995,000 - 7,499 7,500 - 9,999 ■ 10,000 − 19,999 20,000 - 29,999 **30,000** or more Not sure

Mileage Pre Covid-19



Savanta:

Q48. Can you estimate how much your annual mileage, on all roads, has been over the past 12 months? Q49. And what would you estimate your annual mileage, on all roads, to

66 have been in the 12 months prior to March 2020 (pre-Covid)?

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

### 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.

HGV/ LGV Vehicle Type

Coach/Bus Vehicle Type





Q16. Which of the following most accurately describes the vehicle you would be likely to use on your typical journey on England's motorways or major 'A' roads? Q17.
Which of the following most accurately describes the vehicle you would be most likely to use on your typical journey on England's motorways or major 'A' roads? Base: Q16 - Main Driver: HGV (249); Q17 – Main Driver – Coach/ Bus (134)

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)





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

Time of Travel



### 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



Q22. In which age groups would the other person/ people travelling with you be? day of the week would you be most likely to make this typical journey? Base: Main Drivers who travel with others: Car/ Van (1863)

71

# 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

#### Tools used for journey planning



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.

Q24. Which, if any, of the following would you use to plan your typical journey on England's motorways and major 'A' roads in advance? Base: All respondents (5628)

#### Savanta:

## 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



Confidence as a driver



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



#### Experience as a driver

### **Detailed data splits**





.....



.....

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



Q26. Overall, how do you think that Highways England could improve the experience of travelling on England's motorways and major 'A' roads for you? Base: Main Driver: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)

#### Savanta:

77

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



Car/Van - Commuter

Car/Van - Business

Car/Van - Leisure

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: Commuter (1899); Business (660); Leisure (2128)





Car/ Van - Highways England Region: NE and Yorkshire

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

79 elements you feel would be your highest priority to improve in the future.

Base: Those travelling in the Northeast/Yorkshire region (789)





Car/ Van - Highways England Region: NW

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

80 elements you feel would be your highest priority to improve in the future.

Base: Those travelling in the Northwest region (1040)





Car/ Van - Highways England Region: Midlands

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

81 elements you feel would be your highest priority to improve in the future. Base: Those travelling in the Midlands region (1472)





Car/ Van - Highways England Region: East

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

82 elements you feel would be your highest priority to improve in the future. Base: Those travelling in the East (724)





Car/ Van - Highways England Region: M25

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

83 elements you feel would be your highest priority to improve in the future.

Base: Those travelling in the M25 region only (358)





Car/ Van - Highways England Region: Southeast

Savanta:

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

84 elements you feel would be your highest priority to improve in the future.

Base: Those travelling in the Southeast region (1191)





Car/Van - Highways England Region: South West

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

85 elements you feel would be your highest priority to improve in the future.

Base: Those travelling in the South West region (854)

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





Car/ Van Driver with a disability

■ Car/ Van driver without a disability

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

86 elements you feel would be your highest priority to improve in the future.

Base: Main Driver: Car/Van drivers with a disability (1519) Car/Van drivers without a disability (2996)

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



■ Blue Badge holders

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

87 elements you feel would be your highest priority to improve in the future. Base: Main Driver: Blue Badge holders and car/ van driver (547)

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

Highest Priority for Improvements - Car / Van Drivers Typical Distance



■ Car/Van - Under 10 miles ■ Car/Van - 10-30 miles ■ Car/Van - Over 30 miles

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

88 elements you feel would be your highest priority to improve in the future. Base: Under 10 miles (984); 10-30 miles (1971); Over 30 miles (1598)

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





Car/Van - Male driver

Car/Van - Female driver

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

89 elements you feel would be your highest priority to improve in the future. Base: Male Car/ Van drivers (2294); Female Car/ Van drivers (2505)

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



Car/ Van driver - 16-24 Car/ Van driver 25-44 Car/ Van driver - 45-64 Car/ Van driver - 65+

Savanta:

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

90~ elements you feel would be your highest priority to improve in the future.

Base: Car/ Van drivers: 16-24 (489); 25-44 (1806); 45-64 (1809); 65+ (708)

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



■ Motorcycle - Commuter

Motorcycle - Business

Motorcycle - Leisure

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

91 elements you feel would be your highest priority to improve in the future. Base: Motorcycle riders: Commuter (196); Business (45); Leisure (160)



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



■ Motorcycle - Male rider

Motorcycle - Female rider

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

92 elements you feel would be your highest priority to improve in the future.

Base: Male Motorcycle riders (231); Female Motorcycle riders (171)

### 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



■ Motorcycle rider - 16-24 Motorcycle rider - 25-44 Motorcycle rider - 45-64

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. 93

Base: Motorcycle riders: 16-24 (105); 25-44 (210); 45-64 (79); 65+ not included due to low base size

Ensuring journeys can be made in fully electric vehicles

### **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



Q25. On a scale of 0 to 10, where 0 is an extremely poor journey and 10 is an excellent journey, overall how would you rate your typical journey on England's

95 motorways and major 'A' roads? Base: Main Driver: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134) Savanta:

## 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



Q28. Below are a couple of statements relating to England's motorways and major 'A' roads. Can you please tell us how much you agree or disagree with each of

96 these

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

Savanta:

### 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



Savanta:

Q28. Below are a couple of statements relating to England's motorways and major 'A' roads. Can you please tell us how much you agree or disagree with each of

97 these

### 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

- I think it is much more important to properly maintain the existing roads
- I think it is a little more important to properly maintain the existing roads
- I think they are both of equal priority
- I think it is a little more important to build new roads/ add lanes to existing ones
- I think it is much more important to build new roads/ add lanes to existing ones
- Not sure

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

98 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

This is a very fair way to fund these roads

This is quite an unfair way to fund these roads

#### ■ Not sure

- This is quite a fair way to fund these roads
- This is a very unfair way to fund these roads

Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if 99 you think this would be a fair or unfair way of funding the roads? Savanta:

### 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

This is a very fair way to fund these roads

This is quite an unfair way to fund these roads

#### ■ Not sure

- This is quite a fair way to fund these roads
- This is a very unfair way to fund these roads

Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if Savanta:

## 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

This is a very fair way to fund these roads

This is quite an unfair way to fund these roads

#### ■ Not sure

- This is quite a fair way to fund these roads
- This is a very unfair way to fund these roads

Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if 101 you think this would be a fair or unfair way of funding the roads? Savanta:

### Road charging has least appeal amongst car/ van drivers



- This is a very fair way to fund these roads
- This is quite an unfair way to fund these roads

#### ■ Not sure

- This is quite a fair way to fund these roads
- This is a very unfair way to fund these roads
- Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if 302 you think this would be a fair or unfair way of funding the roads? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)

## 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

This is a very fair way to fund these roads

This is quite an unfair way to fund these roads

#### ■ Not sure

- This is quite a fair way to fund these roads
- This is a very unfair way to fund these roads

Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if you think this would be a fair or unfair way of funding the roads? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)

# 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



This is a very fair way to fund these roads

This is quite a fair way to fund these roads

■ This is a very unfair way to fund these roads

This is quite an unfair way to fund these roads

#### r may to rana choco ro

#### ■ Not sure

Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if 104 you think this would be a fair or unfair way of funding the roads? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)

## 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)



This is guite a fair way to fund these roads

This is a very unfair way to fund these roads

Savanta:

- This is a very fair way to fund these roads
- This is quite an unfair way to fund these roads
- Not sure

Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if 105 you think this would be a fair or unfair way of funding the roads?

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



#### Road Funding - Via taxes on petrol/ diesel

This is a very fair way to fund these roads

This is quite an unfair way to fund these roads

#### ■ Not sure

- This is quite a fair way to fund these roads
- This is a very unfair way to fund these roads

Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if you think this would be a fair or unfair way of funding the roads? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)

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



#### Road Funding - Via general income taxes

- This is a very fair way to fund these roads
- This is quite an unfair way to fund these roads

#### ■ Not sure

- This is quite a fair way to fund these roads
- This is a very unfair way to fund these roads
- Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if you think this would be a fair or unfair way of funding the roads? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)

#### 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

- This is a very fair way to fund these roads
- This is quite an unfair way to fund these roads

#### ■ Not sure

- This is quite a fair way to fund these roads
- This is a very unfair way to fund these roads
- Q33. Below are a number of ways people have mentioned for providing funding for the motorways and major 'A' roads in England. For each one of these could you please tell us if 308 you think this would be a fair or unfair way of funding the roads? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)
## 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

109 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); Motorcycle (407); HGV (249); Coach/ Bus (134)

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

Reasons for Poor Rating on Road Surface(s)





## **Respondent Classification**



111 Classification: Private



## 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



- Friend, relative or colleague
- Information on the road itself about future closures/ restrictions ■ Not sure
- Other
- None of the above/ don't plan these journeys

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

Tools Used for Journey Planning – Motorcycle/ Moped Riders



114

# 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



- Friend, relative or colleague
- Information on the road itself about future closures/ restrictions
  Not sure
- Through your place of work
- Other
- None of the above/ don't plan these journeys

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

Tools Used for Journey Planning – Coach/ Bus Drivers



- Journey planning website
- News website
- Communications from Highways England
- News in local press/radio/ TV
- Friend, relative or colleague
- Information on the road itself about future closures/ restrictions
  Not sure

- Highways England website
- Journey planning app
- Social Media
- SatNav
- Through your place of work
- Other
- None of the above/ don't plan these journeys

## HGV drivers are the most confident users of Motorways



#### Confidence – on Motorways

<sup>117</sup> Q46. How confident are you as a driver on...? Base: All Respondents (5628); Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)



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.



### Confidence – Major 'A' Roads



### Confidence – Local Roads

118 Q46. How confident are you as a driver on...? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)

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





 $27^{9}$ 

9%

Experience – Major 'A' Roads

Very experiencedFairly experiencedNot very experiencedNot at all experienced

11%

6%

#### Savanta:

13%

## 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



<sup>123</sup> Q55. Do you have any of these long-term physical or mental impairments which limit your daily activities or the work that you can do? Base: Main Drivers: Car/Van (4818); Motorcycle (407);

## **Occupation of chief wage earner**

### Occupation of Chief Wage Earner



Q57. Which of the following best describes the occupation of the Chief Wage earner in your household? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/ Bus (134)

124

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

**Ethnic Origin Summary** 



<sup>125</sup>Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)

## **Ethnic origin**

.....

### Ethnic Origin - White



126 Q58. How would you describe your ethnic background? Base: Main Drivers: Car/Van (4818); Motorcycle (407); HGV (249); Coach/Bus (134)

### Asian or Asian British



### Ethnic Origin - Black or Black British



Ethnic Origin - Mixed



Ethnic Origin - Others



