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Road users' priorities for improvement  
freight and coach operators report  
Prepared for Transport Focus

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August 2021

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## Interviews were conducted with coach and freight operators to understand their priorities for the third Road Investment Strategy

- We are at the beginning of the **second Road Investment Strategy (RIS 2)** which runs from 2020 to 2025. This study looks to understand what road users would like to see prioritised in the **third strategy covering 2025 to 2030 (RIS 3)**.
- Illuminas has conducted qualitative research to explore what car drivers, motorcyclists, lorry drivers, pedestrians, equestrians and cyclists **value**, and how they would want to see those priorities measured.
- In addition, we have conducted ten interviews with **experts**: senior managers within coach and freight companies, and industry-wide bodies. These operators have provided a useful contrast with road users as a whole, offering an informed perspective on the Strategic Road Network.

# Who did we speak to?



## Freight operators

Organisations moving cargo and using the Strategic Road Network to do so. These organisations provided a view on what improvements commercial operators would like to see from Highways England.



## Coach operators

Organisations moving passengers on the Strategic Road Network, providing a valuable insight into how the network can best serve passengers.



## Trade associations

Organisations representing the interests of companies using the Strategic Road Network for the movement of goods or passengers.

**10** Interviews with senior managers within each organisation between March and April 2021



# Freight and coach operators largely agreed with the set of priorities outlined by drivers as a whole

For these organisations, their drivers face the same frustrations as non-professional drivers, but dialled up due to the sheer length of time spent on the network.

In addition, **delays have financial implications**: a delay on the network is a direct cost, raising the importance of improving the network to a much higher level. Potholes were an annoyance for our road users, but a significant threat to business users.

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

*For us, the road network is a place of work. From a health and safety point of view, the way the network operates has an impact on the wellbeing of every worker who uses it. People don't appreciate that lorry drivers who are there, day in, day out, are dealing with those frustrations, but for the entire working day.*

Industry Body

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

Industry Body



# Road surface quality is seen as something of a hygiene factor

While operators primarily critique the network from a strategic perspective, they do consider the overall quality of the roads. Road surface quality is usually **defined as 'the absence of potholes'** and is of particular importance for coach operators, who need to consider both the safety of their drivers and the comfort of their passengers.

In line with non-professional car drivers, they see potholes as an issue that **'ought to' have been resolved by this stage**. It is not their top concern since they hire professional drivers and can to some extent 'live with' lapses in road surface quality.

*Much of the money is earmarked for major products but there's a disproportionate amount for future developments and not enough for **routine maintenance**. Just drive on the M6 and you find **potholes**. Now potholes should never happen, just for safety reasons. If you hit something at 70 miles an hour in the dark, **even our vehicles are damaged**.*

**Coach Operator**

*We cope. It's not a bad road network, we're not terrified of **potholes or anything**. There are a few unlit sections of the motorway that we would rather see lit, and these are professional drivers, but long stretches of dark road are a **tiredness risk**.*

**Coach Operator**

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

**Coach Operator**

## Operators largely expect the demand for their services to remain fixed, if not increase

Unlike private road use, there was little indication that there will be (or could be) a modal shift away from road haulage. The trend of buying products online for home delivery is likely to continue or grow.

As a result, building capacity for passenger and cargo transport on the road network was seen as a key goal. In these operators' view, there is little choice but to ensure that lorries and coaches can operate reliably, but shifting private vehicle owners towards public transport seems feasible and desirable.

*There is going to be a continued need for transportation, and for freight transportation in particular – that is going to be powered by some means or another. Rail already has a reasonable market share, and it's not going to change, and **we're certainly not going to buy less.***

**Freight Operator**



# Organisations using the network take a broader view about priorities for improvement than individual drivers

## Freight and coach operators tend to consider the Strategic Road Network as a whole

By contrast, individual road users tended to focus on their individual stretch of motorway or 'A' road rather than the overall Strategic Road Network. These users do not see the network as 'actively managed' or as an interconnected whole.

## Freight and coach operators often feel overlooked in terms of the planning of the network

This includes a lack of bus priority lanes, particularly during COVID-19 where road space allocation was often focussed on pedestrians and cyclists. In addition, roadworks undertaken at night may serve car drivers' needs, but for freight operators, this is a significant cause of delay.

## Many challenge the idea that "commuter time" should be valued more highly than leisure, business or commercial drivers

Operators also point out that the public as a whole are a stakeholder in road haulage: people want parcels or goods delivered on time, and a delay to an HGV may 'ripple out' to affect many end customers.

*They are getting better in this respect; they used to only put maintenance embargoes on things like school holidays but now they include them for things like Black Friday and the run-up to Christmas. They are looking at the industry and thinking about it more. **But we want them to do more.***

**Freight Operator**

*We'll see things like, the M6 has been closed and ten trucks have been diverted. But what they fail to understand is that those ten trucks could contain 18,000 final deliveries. **So while they think they've inconvenienced one truck, they've impacted almost 20,000 deliveries.***

**Freight Operator**



# Freight and coach operators generally saw electric vehicles as inevitable, but lack a clear 'roadmap' they can plan around

- The sheer length of journeys that professional drivers undertake is a significant barrier to electrification. While private vehicle owners may be able to charge their vehicle at home, this will be unsuitable for fleet operators who take longer-distance journeys and at scale.
- At this stage, it may be too early to know exactly what kind of fuel, or combination of fuels, will be most appropriate for fleet operators to use. Operators expect Highways England to stay abreast of these developments and rapidly implement the infrastructure necessary.

*We'd like to see people being able to **lease trucks** so that you have the agility to change if you need to. When you buy a truck you then own it for ten, twelve or fourteen years.*

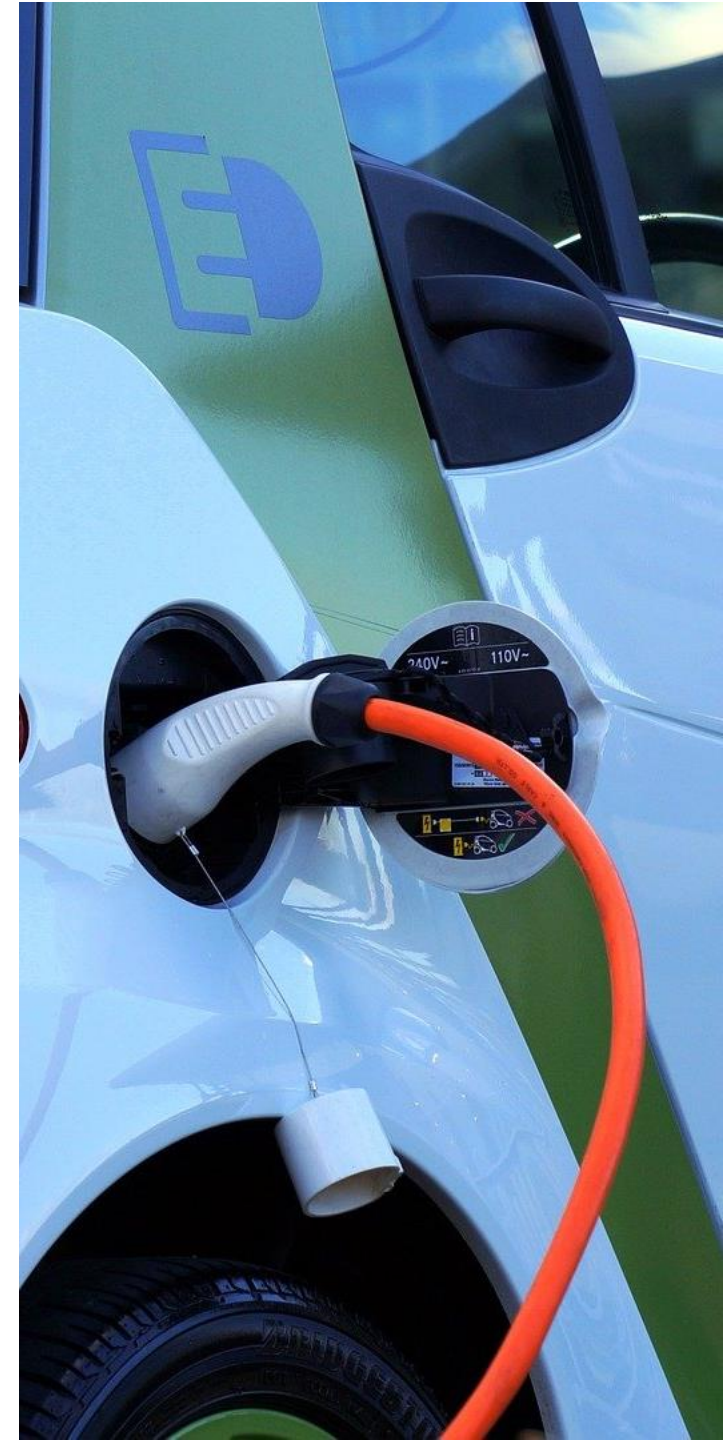
**Industry Body**

***Batteries won't get you long-distance travel,** or at least not for a while; so you may end up with a system where you have short-to-medium-distance journeys on battery and then long-distance journey by hydrogen. It can't just be a couple of stops on the motorway; it will have to be everywhere.*

**Coach Operator**

*There are companies with sustainability commitments but their drivers are going to need to be able to charge their electric vehicles somewhere other than at home, so charging infrastructure is huge for us. For HGVs we still don't know if battery is the way forward – is it hydrogen? Is it electric, or something else? **We have no clear direction.***

**Industry Body**





# Advance notice of significant delays – across the entire network – is essential

## As discussed, these organisations consider the Strategic Road Network in its entirety

Significant investment in time and resource is placed on the assumption that the network will be running smoothly at a given time and place; when updates about maintenance or disruption come late, this can have major knock-on effects for coach and haulage firms. Importantly, companies need to know what their alternatives are in the event of a road closure.

While individual coach passengers may be aware of disruption, they do not know what the impact of the disruption will be for their coach journey: they expect the operator to tell them, and the operator expects Highways England to assist them in finding out.

Given that companies operate at the national level, the regional divisions of Highways England can sometimes feel siloed and un-coordinated. Operators expect Highways England to provide a nation-wide perspective on disruption and maintenance.

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

Freight Operator

*The late planned maintenance is a killer: "Whoops, we're going to rip up the road and we didn't tell you." **Well, I've already sold the tickets.** I like to know that stuff is coming and adjust my timetables. Someone who arrives on time is satisfied, and at least if I know in advance then I can tell the passenger and they've bought the ticket in the knowledge of what's going on.*

Coach Operator

*The guys can be leaving at eight at night, the roadworks come on at ten at night and they don't know – we have designed our own software to help with that but even now, Highways England don't co-ordinate closures well enough. **They work in regions in Highways England, but they don't talk to each other.***

Freight Operator

# Modal shift is a major priority, and operators identified specific measures to achieve it

## Integration with rail and bus

- Freight and coach operators generally argued that the road network could do more to provide access to stations, given that the first or last mile of many journeys are often undertaken by private vehicle.
- These operators recognise that electric vehicles are not a solution to the problem of congestion. Journey delays are a significant business challenge for the industry, and ensuring that more people feel able to use public transport is vital.

## Park and Ride

- The potential usefulness of park and ride is poorly understood by drivers but objectively valuable, in these operators' view. This will need to be promoted to would-be passengers on the strength of journey time and cost. Direct incentives like cheaper parking for bus users would also be valued.

*There's a tendency to see car travel as the enemy, but there will always be situations where you need to travel by car, and we would like to see that accounted for in policy. **Car clubs and rental** can help with that, but also building people's confidence to get them on to public transport.*

Industry Body

*In transport modelling, every time you discourage someone out of their car and on to public transport, there is a loss to the Treasury. This tends to work in favour of curing bottlenecks – that's not to say that every investment in the roads is wrong, **but we need to level the playing field** between modes to make it more desirable to invest in public transport.*

Coach Operator

*A coach can take a mile of traffic off the road, half the carbon of a train and between an eighth and a quarter of the carbon of a car. It's not always recognised. We have to educate people.*

Coach Operator

# Operators want road infrastructure to be adapted appropriately for their vehicles to ensure a safe and reliable journey

## Reassurances around the safety of all-lane running would be valued

Coach and lorry operators alike fear that emergency refuge areas will not be large enough, or frequent enough, to accommodate them. For coach operators, the number of passengers on board is felt to exacerbate the consequences of something going wrong.

## Road features like low bridges can cause unpredictable diversions

Infrastructure that makes it impossible for freight vehicles to pass through can leave operators feeling as though their needs have been overlooked. Likewise, features to improve the overall quality-of-life for drivers are important: motorway services; overnight parking; hard shoulders and rest stops.

## The network is not yet felt to support platooning for freight vehicles

Platooning, or using telemetry and vehicle communication to allow groups of vehicles to accelerate, brake or cruise together, is recognised as having potential efficiency and safety benefits. However, the network is felt to have a great deal of legacy infrastructure to upgrade before such an innovation could be rolled out at scale.

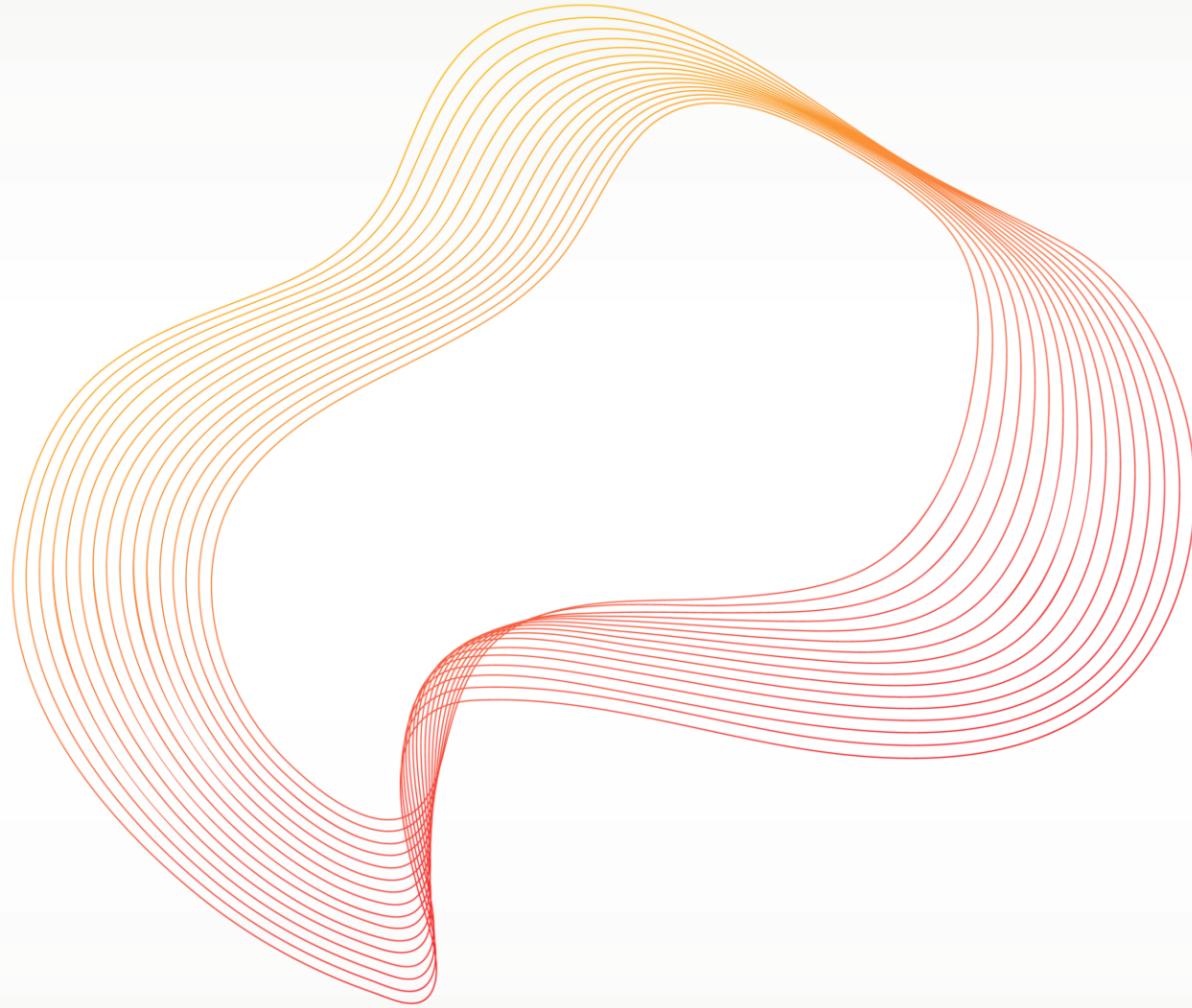
*The number of low bridges on the road network is something we'd like looked at. **The majority of our fleet is double-deck so we have instances where we have to take the long way around.** In an ideal world every single bridge would be high enough to take a double deck...*

**Freight Operator**

*The operation of smart motorways is a problem. The engineers look at it and think 'All you have to do is call up and they'll close the lane', but how long do you have to wait for that to happen?*

**Industry Body**





## Summary and conclusions

# The priorities of coach and freight operators on the Strategic Road Network were not dissimilar to road users as a whole

## **Operators were able to think in longer time frames**

Few, if any, had urgent or short-term priorities for the network. All the major areas for change were expected to take place over longer time-frames, but certainly during the third Road Investment Strategy period.

These freight and coach operators were able to think about the limitations of the Strategic Road Network. They were aware of legacy infrastructure and are, as a result, stoic about what can be changed and what may take longer.

## **Much like road users as a whole, their priorities centred on enhancing information about delays, and reducing the impact of delays**

Freight operators often argued that they suffer the impacts of delay to a greater extent than other road users. They operate across multiple regions in the road network, with multiple drivers on the road at any one time.

Delays have a direct impact on business costs, as well as the allocation of resources, and being made more aware of delays across the entire network, rather than individual Highways England regions, would be valuable.

## **Operators do expect the road network to support electrification for fleets as well as personal vehicle users**

Again, given the scale of their operations, as well as the long-distance journeys made, charging stations for electric vehicles will need to be abundant across the network to enable their uptake.

While operators may not know the overall 'direction of travel' for technological changes, they will expect the network to support them, with infrastructure 'dialled up' to reflect long distances travelled across the entire Strategic Road Network.



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