



Logistics and Coach Survey: Strategic Roads

2021-22

Foreword

Businesses running lorries and coaches on England’s motorways and major ‘A’ roads are vital to our lives and the economy. Most of the things we buy will have been on a lorry on the strategic road network (SRN), even if they have also been on a ship or train. Coaches running on the SRN play a big part in the leisure industry whether for tour holidays, scheduled long-distance services or private hires. Think of the coaches that descend on football grounds on matchdays bringing players, coaching staff and spectators.

Transport Focus therefore carries out the Logistics and Coach Survey: Strategic Roads to measure how satisfied these businesses – as

distinct from their driving staff – are with National Highways’ roads and understand what they want to see improved. The survey is referred to in the Government’s Road Investment Strategy for 2020-25.

These results show that around half of those taking part in the 2021/22 survey were satisfied when it comes to the SRN meeting their business needs. In the year ahead Transport Focus will continue to work with National Highways to address the issues raised by these important customers.

Anthony Smith

Chief executive, Transport Focus



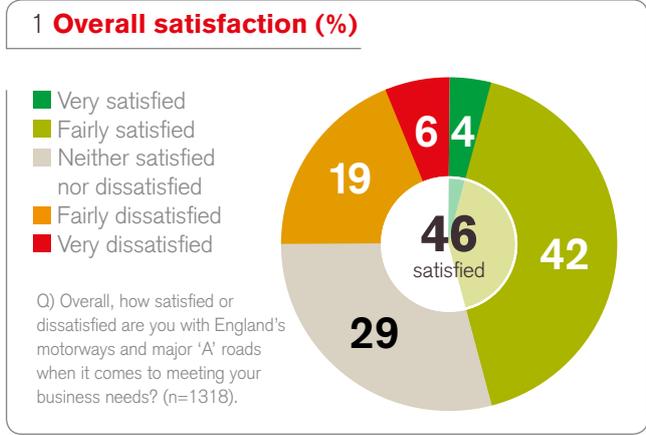
Results

Overall satisfaction

We asked 'Overall, how satisfied or dissatisfied are you with England's motorways and major 'A' roads when it comes to meeting your business needs?'. Just under half (46 per cent) were satisfied overall, while around one in four were dissatisfied (24 per cent).

Overall satisfaction for the freight sector was 46 per cent. Among those using articulated lorries (made up of two separate sections – a driving cab and a trailer) satisfaction was 47 per cent. Among those using rigid lorries (those without a separate driving cab) satisfaction was 45 per cent.

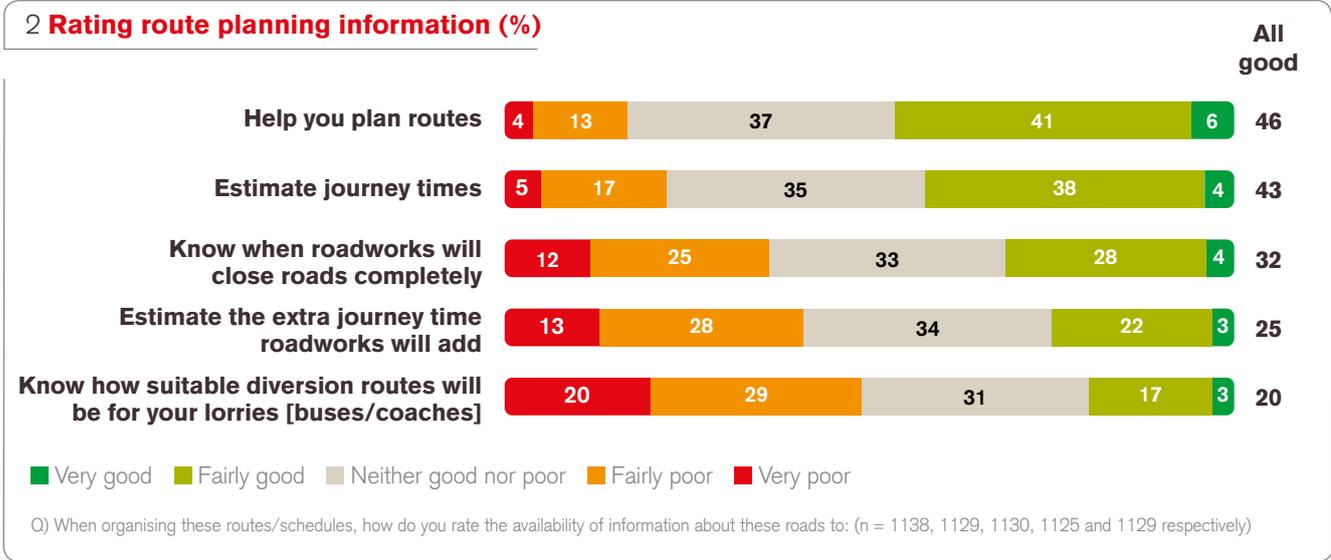
The satisfaction figure for the coach sector was 44 per cent.



Planning routes

Just over four fifths of vehicle managers (87 per cent) are involved in route planning. Their satisfaction ratings were no more than 50 per cent on any aspect of information available. Rated notably lower was information to estimate extra journey time due to roadworks (25 per cent) and information about how suitable diversion routes are for vehicles (20 per cent).

"Major roadworks completed in a quicker amount of time with maybe contractors getting incentives for completing early."
 Freight, rigid lorries over 7.5T



"Provide more detailed information about road closures and more accurate estimated times of re-opening."
 Freight, articulated lorries

Of the vehicle managers involved in route planning, close to four in five do so on the day or within a few days of journeys. Just over half say their lorries are on the strategic road network for more than five hours on an average journey. Half say the window for their arrival is 30 minutes or less. Around two thirds use internal planning systems as part of their methods to plan their routes (only asked of freight managers).

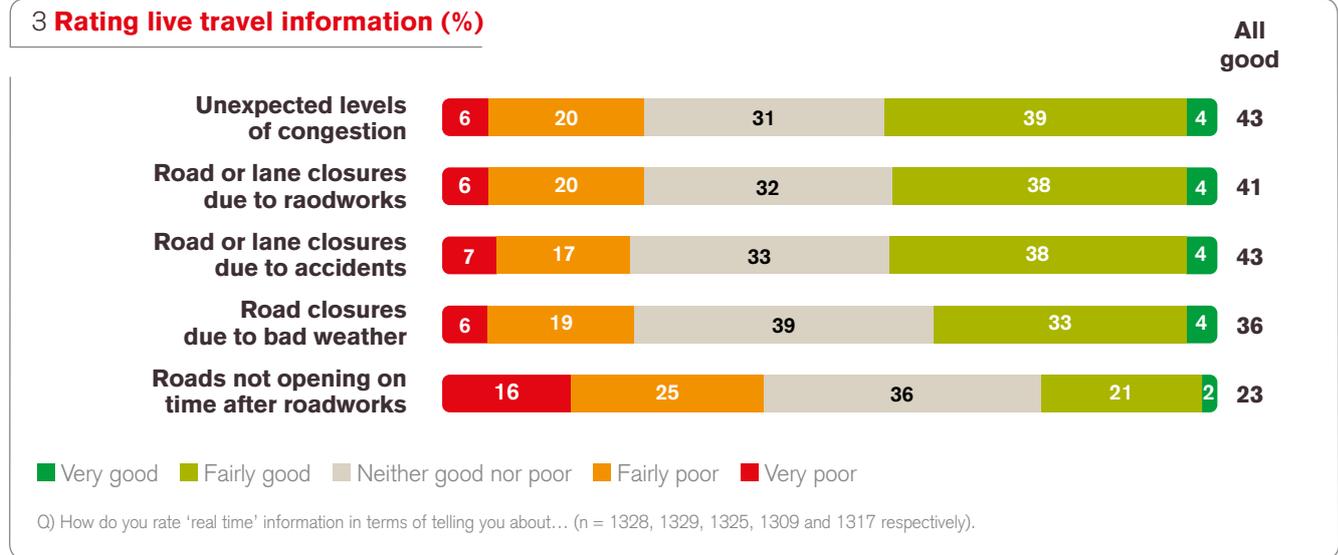
On the day information

Most measures on availability of live travel information were rated fractionally better than those for advance planning information, although still below 50 per cent. However, the rating for information about overrunning roadworks is particularly low, with 23 per cent rating it good.

"Accidents/incidents excluding those which involve fatalities to be cleared more quickly."

Freight, articulated lorries

3 Rating live travel information (%)



Responding to incidents and accidents

On responding to incidents and accidents, just over a quarter rated the time to re-open roads as good. The aspects under this heading were rated as poor by around half of vehicle managers. A theme from comments is the

view among vehicle managers that 'low level' incidents take a disproportionate amount of time to clear; that a more common sense approach should be taken.

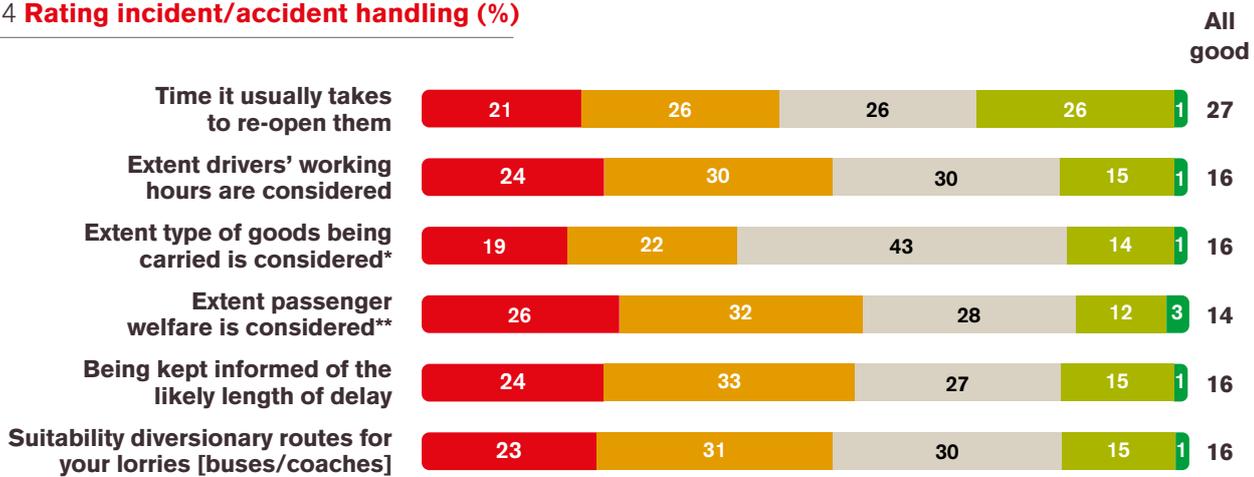
"The use of common sense when dealing with incidents and roadworks."

Freight, articulated lorries

"Accidents dealt with like Germany. Get the roads cleared as quickly as possible."

Freight, articulated lorries

4 Rating incident/accident handling (%)



Very good Fairly good Neither good nor poor Fairly poor Very poor

Q) How do you rate 'real time' information in terms of telling you about... (n = 1331, 1297, 1112, 152, 1325, and 1314 respectively).
* asked of freight only; ** asked of coach only.

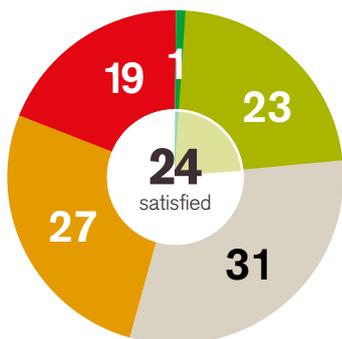
Road surface

The impact that road surfaces have on vehicles is frequently mentioned. Just under a quarter of respondents rated road surfaces as good but just over two fifths rated them poor. Around a quarter of freight managers were concerned that surfaces are damaging goods and a third of coach managers felt surface quality impacted passenger comfort.

5a Road surface - wear and tear (%)

Very good
Fairly good
Neither good nor poor
Fairly poor
Very poor

Q) How do you rate the surfaces of these roads in terms of: minimising wear and tear to your lorries (buses/coaches) or their tyres? (n = 1332).



"Proper road repairs carried out. Potholes repaired properly and not just quickly filled in."

Freight, rigid lorries over 25T

5b Road surface – impact on goods/passengers (%)

Very good
Fairly good
Neither good nor poor
Fairly poor
Very poor

Q) How do you rate the surfaces of these roads in terms of: not damaging goods? (n = 1158).



Coach managers



Q) How do you rate the surfaces of these roads in terms of: not making passengers uncomfortable? (n = 1153).

Rest stops

There were a considerable number of comments around the facilities for drivers to properly rest, especially as they have regulated driving hours. Vehicle security (while parked up) and the value for money of rest places were rated as poor by around two thirds of all vehicle managers.



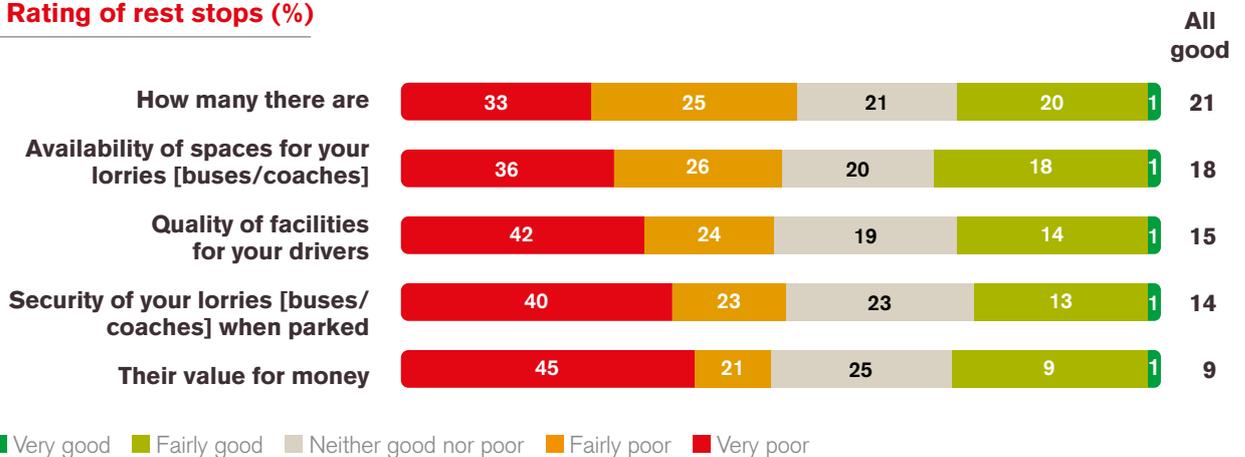
"Better facilities for drivers, especially in an attempt to encourage new people of both sexes into the industry. Become a driver. Sleep in a truck with no toilet or showers or hot food or healthy food even if you can get hot food."

Freight, articulated lorries

"More thought to drivers' hours, safe parking, loaded vehicles safety e.g. A34 towards Southampton is notorious for container break-ins. We get broken into every single time a driver runs out of hours. We end up parking up early to avoid using laybys when loaded."

Freight, articulated lorries

6 Rating of rest stops (%)



Q) Thinking about stopping places for your lorries (buses/coaches) and drivers on these roads, from a business perspective, how do you rate the following: (n = 1306, 1313, 1310, 1296 and 1276 respectively).

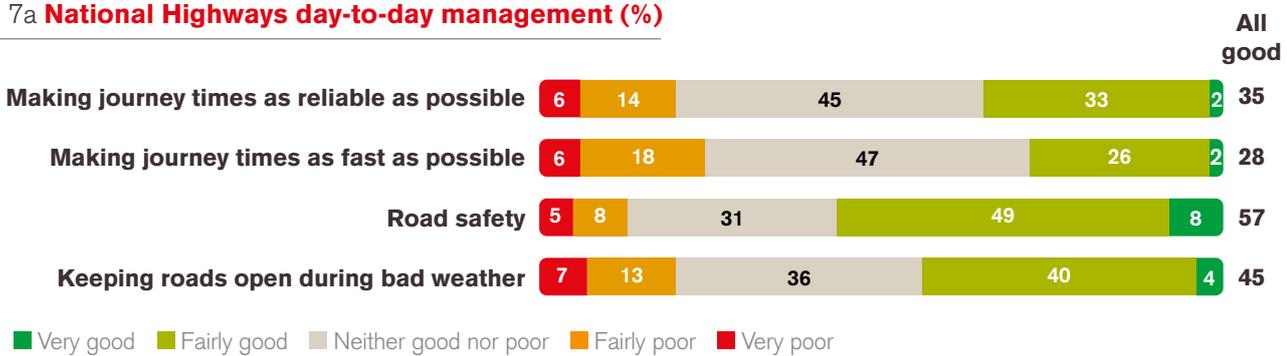
View of how National Highways manages these roads

On day-to-day management of National Highways' roads, safety scored highest, with 57 per cent rating it good. On keeping roads open in bad weather, almost half rated it good. Around three in ten vehicle managers rated the efforts being made to make journey times as reliable and fast as possible as good.

"To work 24/7 to reduce road closure time. Too many miles of lanes closed with no work going on. No consideration given to delays and inconvenience."

Coach, publicly scheduled services

7a National Highways day-to-day management (%)



Q) From a business standpoint, how do you rate National Highways' management of these roads in terms of: (n = 1307, 1308, 1308 and 1311).

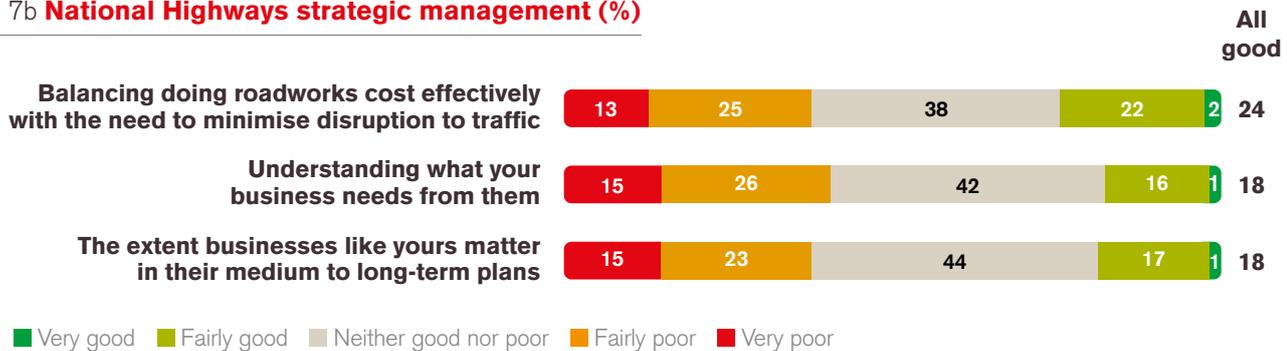
However, when looking at the more 'strategic' aspects of management, ratings of 'good' are lower and 'poor' are higher. Two in five freight and coach managers do not feel their needs are understood, nor that they matter much in the medium to long-term planning for these roads.

We also asked about freight and coach vehicle managers' awareness of National Highways' role. Almost three in five said they had a fair understanding or better (57 per cent) and around one third (35 per cent) said a basic understanding. Very few (eight per cent) said they knew little or nothing about National Highways' role.

"Shorter restricted sections of roadworks. Some can be up to ten miles long when a three mile section would be enough."

Freight, articulated lorries

7b National Highways strategic management (%)

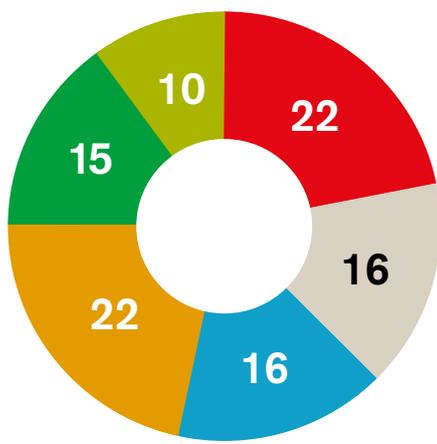


Q) How do you rate National Highways in respect of: (n = 1292, 1285, and 1271 respectively).

What drives overall satisfaction

The extent to which each of these areas influences overall satisfaction is shown in the chart below. How National Highways manages the network has the largest influence, followed by route planning information and on the day information. Within National Highways' management of the network, the top two measures impacting satisfaction are journey time reliability and journey speeds.

8 What drives overall satisfaction (%)



- How National Highways manages the network
- Road surface
- On the day information
- Route planning information
- Accident handling
- Rest stops

Results are from a regression model assessing association between overall satisfaction and ratings for all attributes measured on a very good to very poor scale. A Shapley approach was chosen to best accommodate any collinearity between attributes. Model $R^2 = 0.35$.

unexpected delays or diversions. Given that National Highways does produce a list of planned road closures specifically aimed at the freight industry, perhaps the challenge is raising awareness of that facility?

- Better roadside facilities where lorries can stop. This covers secure parking to minimise theft/vandalism but also facilities for drivers to take better quality breaks: toilets, showers, healthier food and places to have a good rest and relax (important for safe driving).

"Why does it take the UK so long to complete road upgrades. So many cones, machines etc. with no one working on them."

Freight, articulated lorries

"Recruit ex-transport managers, lorry drivers, recovery drivers into Highways England [now National Highways] and stop having contracts with civil engineering firms who delegate work to freshly qualified or placement students who do not have a clue about reality, instead of lecture room theory."

Freight, articulated lorries

What needs to improve

We asked vehicle managers what they would like to see improved. Many of their replies reflect the areas they rated poorly. The following points were mentioned most frequently:

- Long stretches of roadworks. Where possible roadworks should be delivered in shorter lengths and if that isn't possible businesses want a greater sense of pace to project delivery. There was a consistent message that progress seems 'pedestrian' and without consideration of the impact on journey times.
- Information about roadworks. A list of all planned road closures should be provided along with a live feed of their status. The latter related to businesses knowing if roads are not going to reopen on time so they can adapt routes rather than have drivers confronted with



Messages to the National Highways' chief executive

We asked respondents what one thing they would say to the National Highways' chief executive if they were to meet. Many restated their 'what to improve' comments but some other notable themes also came through:

- The SRN matters hugely to the functioning of freight and coach businesses and its performance has significant commercial consequences. Respondents want greater recognition of this in the way roadworks are planned, incidents cleared and in the general management of the network. They believe they have valuable advice to give if they were consulted more effectively.
- Respondents do not feel road maintenance is well planned/co-ordinated or efficiently delivered. They feel National Highways is just treading water when it comes to maintenance rather than getting properly on top of the condition of its roads.
- There remain concerns about the safety of smart motorways. Some businesses are against them full stop while others think they could work safely if implemented more effectively.

"Get rid of smart motorways, they are a death trap. Build roads better in the first place, to avoid costly, continuous repairs."

Freight, articulated lorries

"Engage with us, be willing to listen to feedback and act upon it."

Coach, publicly scheduled services

"Smart motorways have the potential to be great, but the implementation and execution of re-education for members of the general public is very poor."

Freight, rigid lorries over 3.5T to 7.5T

"Accident management needs drastically improving. Facilities for commercial drivers are limited, next to no security, expensive and in the main, rubbish."

Freight, articulated lorries

How we did it

Those responsible for operating vehicles over 3.5 tonnes ('vehicle managers') must be licensed by their Regional Traffic Commissioner, who makes a summary of this register publicly available. This is often referred to as the 'O' licence database. Transport Focus used this to select vehicle managers in proportion to the size of their fleet and invited them to complete a questionnaire.

During Road Period 2 (April 2020 to March 2025) we will carry out the survey three times each year, with fieldwork in May-June, October-November and February-March. The first year of the survey was an exception when it was carried out only in October-November 2020 and February-March 2021.

The results in this report are based on all three survey waves during the 2021-22 year. The overall number of responses was 1376. Of this 1216 responses are from freight and 160 are from coach vehicle managers. In each wave an invitation to complete the survey is issued followed by two reminders. The questionnaire is provided in the first and final letters.

To take part in the survey, the majority of a vehicle manager's vehicles must use the strategic road network at least once a week. For the freight element of the survey, results are weighted to the goods laden mileage proportions within the Department for Transport's Road Freight Survey (see table RFS0117 in that survey). In the overall results, freight constitutes 95 per cent of the total and coach five per cent – matching the estimated use of the strategic road network by these sectors.

Further details of the methodology are available from Transport Focus. References to coach operators includes bus operators where they run on England's strategic roads.

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Transport Focus is the operating
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