



Strategic Roads User Survey

Findings for the South West: October 2021 – September 2022

Report published July 2023

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Introduction



Strategic Roads User Survey (SRUS)

Transport Focus represents the interests of users of England's motorways and major A-roads, known as the Strategic Road Network (SRN). These are the roads managed by National Highways on behalf of the Government.

To help inform this, the SRUS gathers feedback on the experience of journeys on the network among a representative sample of SRN users



Push-to-web approach

Invitation letters are posted to a representative sample of households in England

Instructions in the letter direct participants to an online survey, for which participants are incentivised



Participants answer about:

Their most recent journey on the SRN within the last four weeks at the time of completing the survey

One specific motorway or major A road within this journey (defined using an interactive map). This ensures feedback is received for all regions and across a full range of roads within them



Results in this report cover 12 months:

October 2021 – September 2022



7,342 responses received in total over this period

918 for roads in the South West

Key findings: SRN experience in the South West

80% The majority of South West SRN journeys are felt to be satisfactory overall

Well above the national average of 72%, and among which a relatively large proportion are “very” satisfied – a pattern also reflected across the majority of other key measures



Satisfactory journeys (as nationally) are when **traffic flows freely** without disruption



Nevertheless, when it does occur, congestion makes for overall dissatisfactory journeys – and hits hard on users in the South West

- Particular features of infrastructure (dominance of major A roads rather than motorways) and usage (seasonal “crunch” periods and prevalence of slower moving vehicles) can make congestion seem unavoidable and difficult to mitigate
- Awareness of disruption of any kind is heavily reliant on exposure during previous journeys – and slightly lower usage frequency than elsewhere may mean that some travellers here are less prepared



Lighting rated relatively poorly

A notable exception, given that almost all other aspects of road usage are rated more favourably here than elsewhere

Other trends, which are also common across the whole SRN network:



Safety perceptions high overall, but some feel less at ease: less familiar drivers, lighter commercial/goods drivers, motorcyclists



Poor driving perceived as common – and while drivers are accountable, the way roads are managed can be felt to provoke poor driving behaviour.



HGV drivers less satisfied overall, experiencing the same issues to a sharper degree

Issues for National Highways South West to consider

After analysis of quantitative and qualitative data in SRUS about journeys in the South West, it appears that National Highways should focus on the following as part of efforts to improve road user satisfaction:

✓ **Finding ways to minimise the impact of congestion**

- Better warnings about common congestion hot spots, especially for less frequent users who are more difficult to reach
- Related to the previous bullet, consider how information would help people avoid the busiest times of day/days of the year – especially in peak leisure seasons
- While the above are important across the region as a whole, the greatest need relates to the A303

✓ **Roadworks**

- Ensure roadworks cause the least disruption possible, for the shortest duration and affecting the shortest stretch of road possible
- Strive to reduce instances where SRN users encounter multiple sets of roadworks on the same journey
- Communication. It appears that more work is needed to inform road users in advance where roadworks will have significant impact, in particular when it comes to less frequent users and the best channels to reach them
- Communication. Explaining the benefits that will result and the rationale for temporary speed restrictions may alleviate some frustration

✓ **Lighting**

- Lighting where it is not currently provided
- Improved lighting where it is already provided

Some overall findings

“Key metrics”



80% of journeys in the South West are felt to be satisfactory, and are rated above the national average across all key measures

Key metrics
Oct 2021 – Sep 2022



Overall satisfaction

80%

Very satisfied 42%
Fairly satisfied 38%

Journey time

78%

Very satisfied 39%
Fairly satisfied 38%

Management of roadworks

55%

Very satisfied 26%
Fairly satisfied 29%

Feeling safe

85%

Very safe 35%
Fairly safe 50%

England-wide

72%

Very satisfied 34%
Fairly satisfied 38%

71%

Very satisfied 34%
Fairly satisfied 37%

49%

Very satisfied 16%
Fairly satisfied 33%

80%

Very safe 31%
Fairly safe 50%

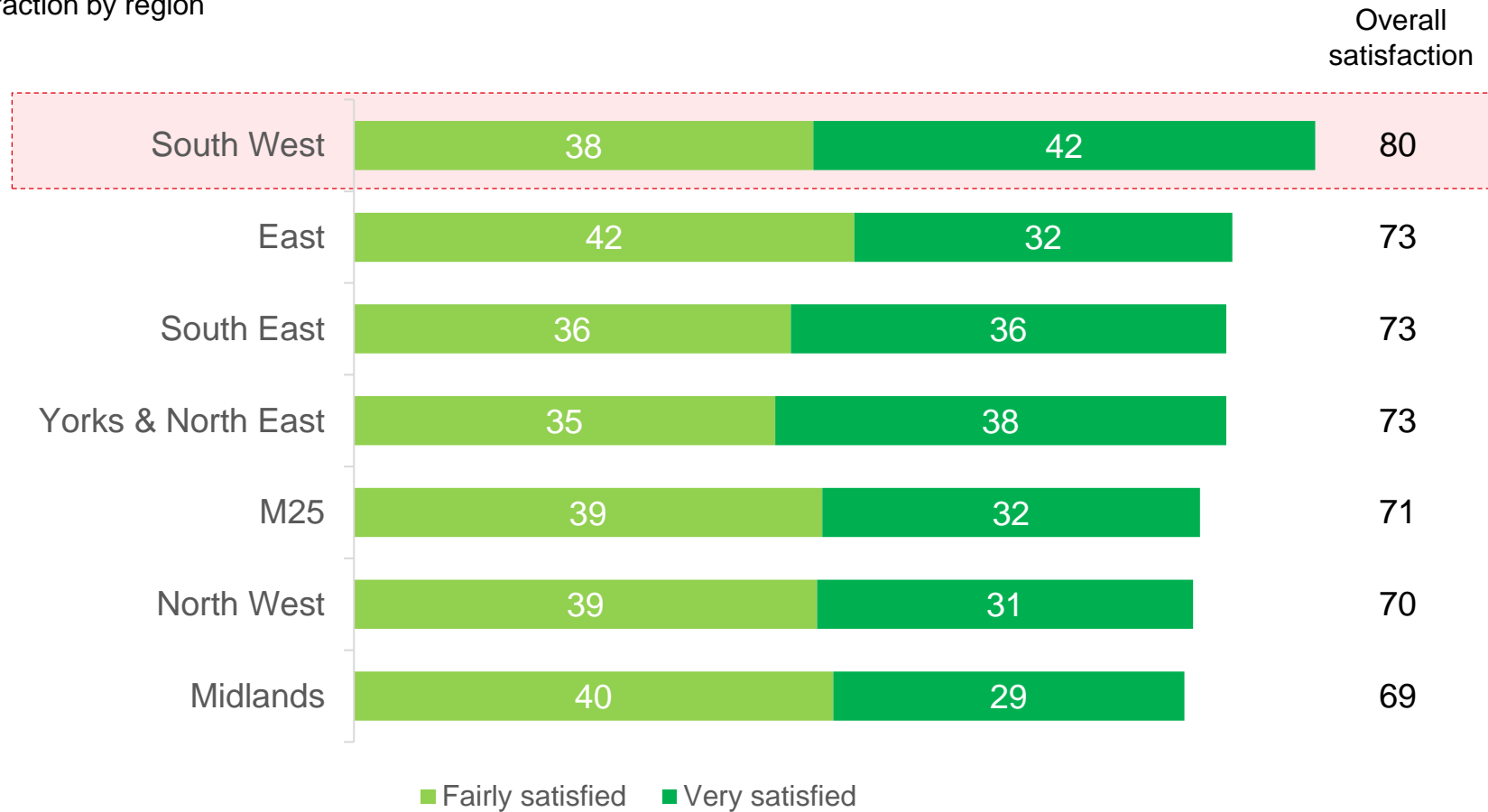
Base: all SRN users surveyed, Oct '21 – Sep '22

All: overall satisfaction (7,322), journey time (7,295), roadworks management (1,690), feeling safe (7,313)

South West: overall satisfaction (917), journey time (914), roadworks management (195), feeling safe (917)

South West SRN journeys in this period were rated satisfactory compared to other regions – notably, with two fifths of journeys felt to be very satisfactory

Overall satisfaction by region
(% very/fairly)



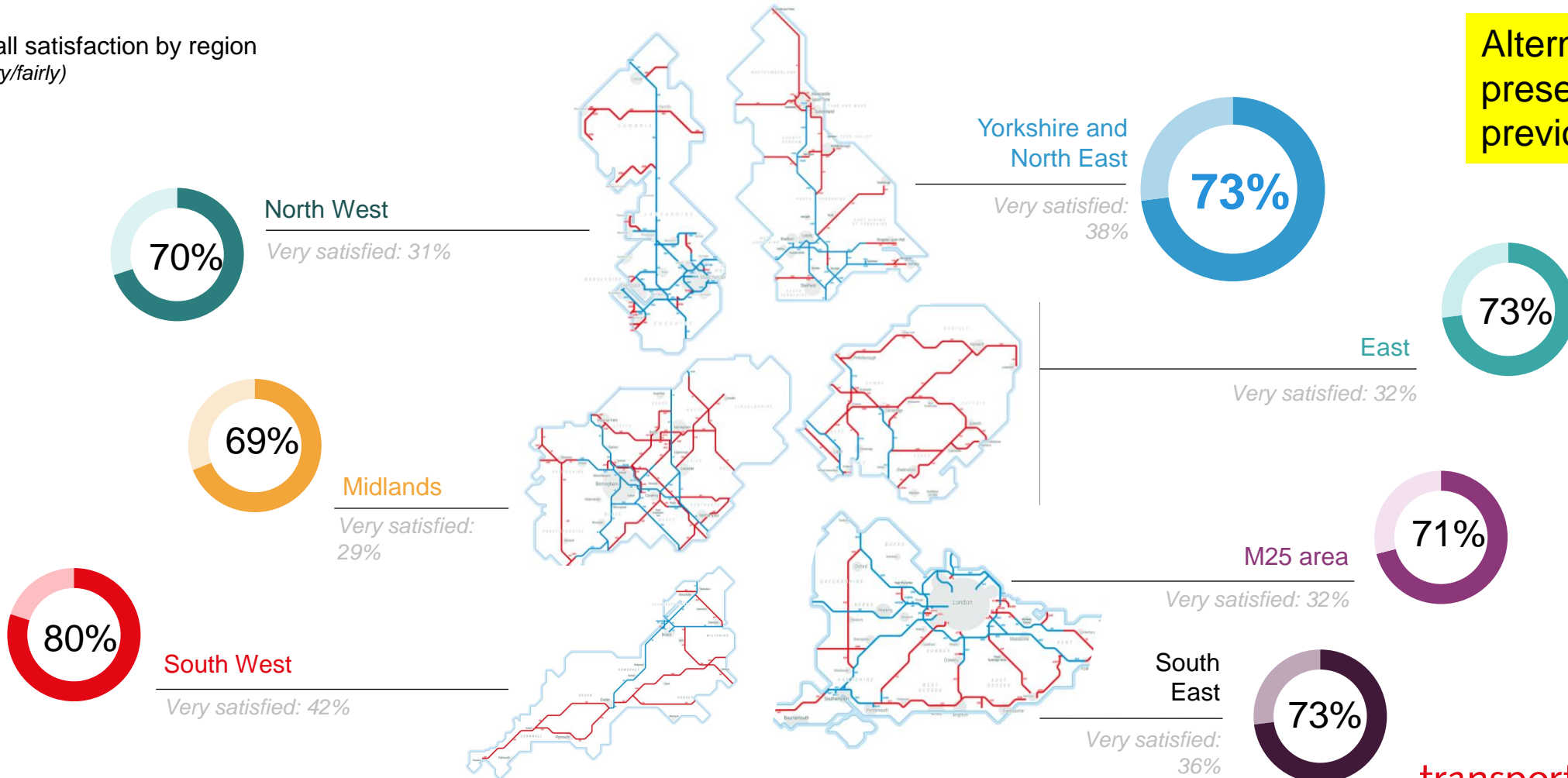
Base: all SRN users surveyed, Oct '21 – Sep '22 (7,322)

South West (917), East (1,047), South East (1,504), Yorkshire and NE: (1,014), M25 (1,057), North West (1,088), Midlands (1,641)

South West SRN journeys in this period were rated satisfactory compared to other regions – notably, with two fifths of journeys felt to be very satisfactory

Overall satisfaction by region
(% very/fairly)

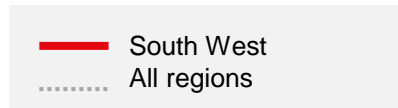
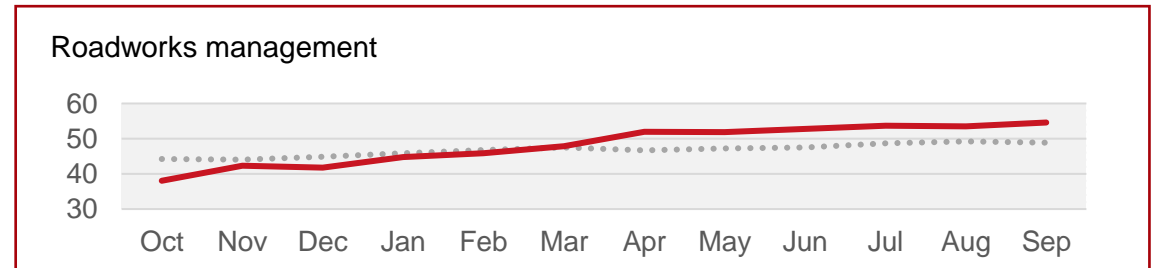
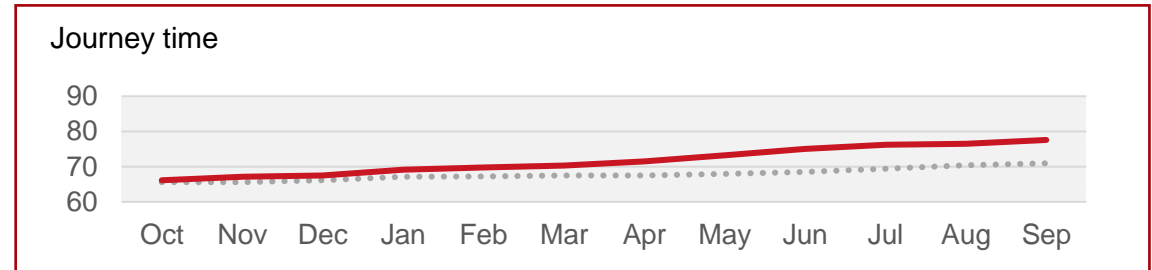
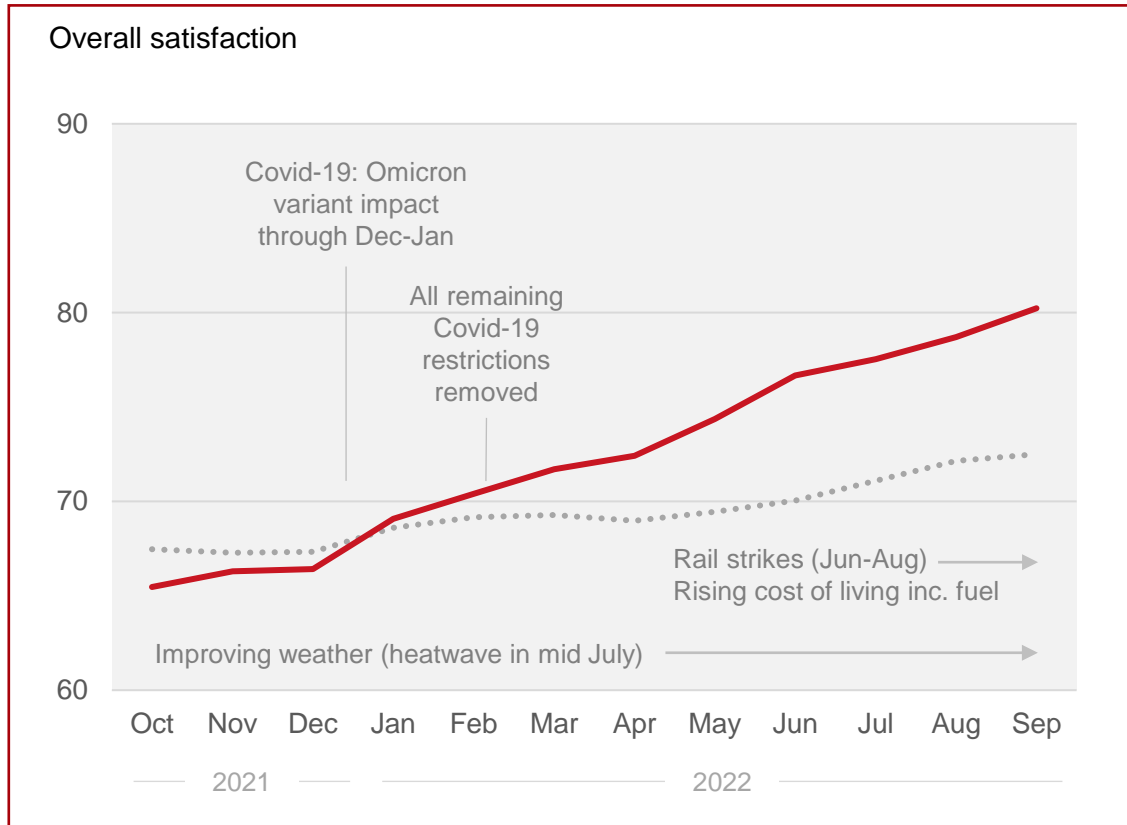
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Base: all SRN users surveyed, Oct '21 – Sep '22 (7,322)
South West (917), East (1,047), South East (1,504), Yorkshire and NE: (1,014), M25 (1,057), North West (1,088), Midlands (1,641)

A turbulent year for travel, but feedback indicates overall journey experience improved nationally on the SRN, seen most markedly in the South West

Key metrics over time (% very/fairly, rolling 12 monthly*)



Base: all SRN users surveyed, Oct '21 – Sep '22 (2,844-7,322)

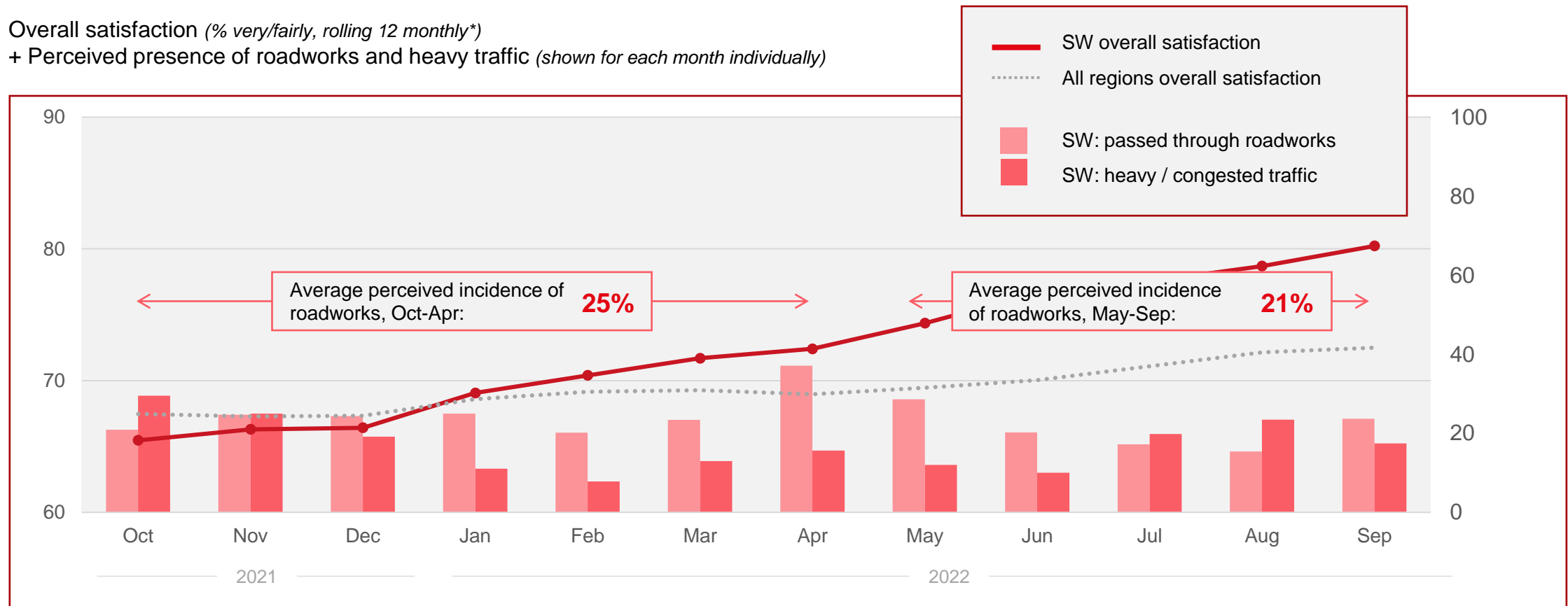
South West: (389-917)

*Until March 2022, data is YTD from April 2021 onwards, due to a methodology change in April 2021

Data is shown as fully 12 month rolling figures from March 2022.

Improvement in satisfaction in South West region likely linked to perceived reduction in congestion after late 2021, and reduction in roadworks from Spring 2022

Overall satisfaction (% very/fairly, rolling 12 monthly*)
 + Perceived presence of roadworks and heavy traffic (shown for each month individually)



Base for overall satisfaction (shown as rolling 12 monthly*): all SRN users surveyed, Oct '21 – Sep '22 (2,844-7,322); South West: (389-917)

Based for presence of roadworks and heavy/congested traffic (shown as discreet months): South West (50-105)

*Until March 2022, data is YTD from April 2021 onwards, due to a methodology change in April 2021. Data is shown as fully 12 month rolling figures from March 2022.



Understanding “overall satisfaction” in more detail

There are two main themes in the reasons users give for satisfactory journeys in the South West

Strategic road users in this region were asked **why** they were satisfied or dissatisfied with their journey, in their own words. We have quantified the key themes which arose, from a random sample of their responses.

Satisfaction: top 4 reasons
(very / fairly satisfied)
% mentioning topic



A minority also mention some other factors, including:

Journey was served well with service stations / stopping points

Good lighting / road marking

Good weather / visibility

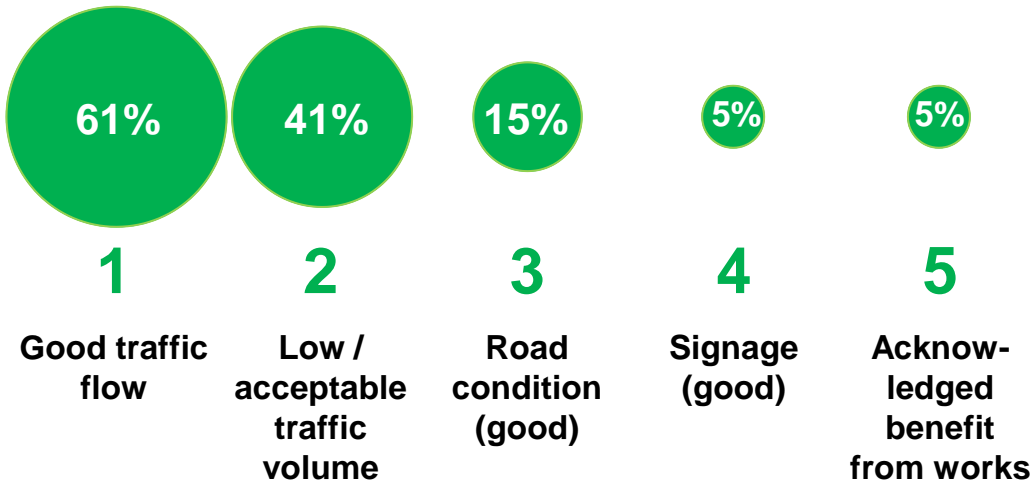
...and some also mention negative factors, which usually explain why they rated their journey as “fairly” rather than “very” satisfactory: see more on this on the next page.

Data shown here is for South West; patterns are very similar at national level

Base: sample of those giving a rationale for overall satisfaction rating Oct 21-Sep 22 – satisfied, South West (78), all regions (200)

Ultimately the absence of disruptions, i.e. where drivers can “keep going”, makes for **fully satisfactory** rather than simply “ok” journeys

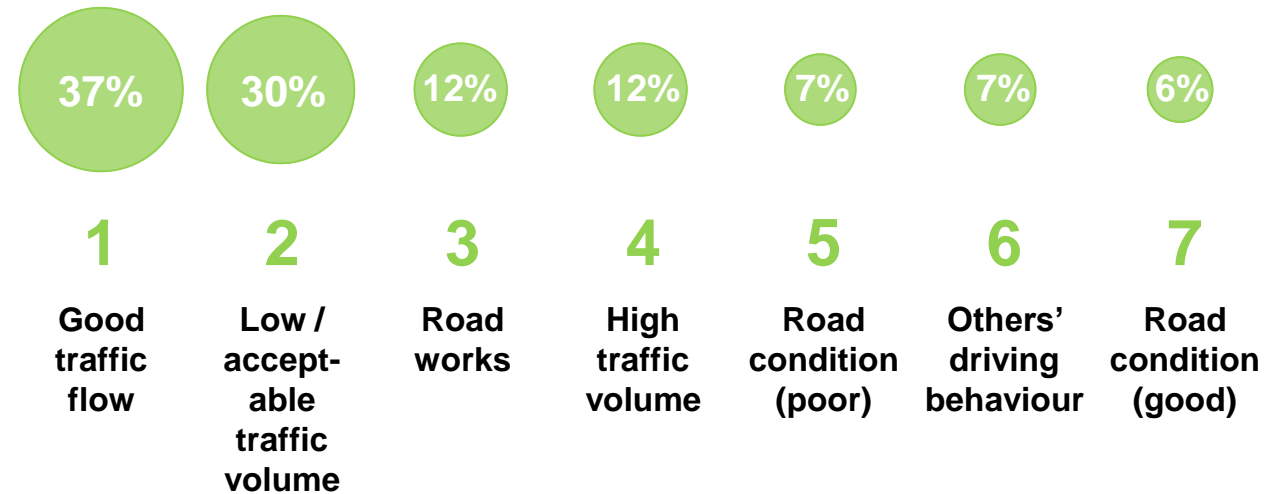
Very satisfied: top reasons
% mentioning topic



Plus:

- ✓ a **range of other factors relating to good management and features** of roads
- ✓ and a **near-total absence of issues** like roadworks, congestion, poor maintenance / markings / signage, etc.

Fairly satisfied: top reasons
% mentioning topic



Plus a **range of other factors relating to poor management and features** of roads

It's worth acknowledging that those who are “fairly satisfied” with SRN journeys often still experience some issues. The South West saw the highest proportions of “very” satisfied users; the aim should be to maintain and even increase this proportion.

Findings on this page are at national level

Absence of disruption and free-flowing traffic makes for genuinely good journeys: fairly satisfied users often feel some aspect of a journey could have been better – or they see a good journey as atypical

Very satisfied: Example comments (South West)

- “ Not much traffic considering it was Good Friday, no road works holding up traffic ”
- “ Traffic was moving well, making for a smooth journey with better than average fuel consumption ”
- “ No traffic when travelling at night ”
- “ The road was not too busy and well signposted ”
- “ No traffic hold ups, cars driving to speed limit ”
- “ No traffic jams and adequate services for toilets etc. ”
- “ It was free flowing and the road condition was good. So we had no concerns of pot holes etc. ”
- “ The road was clear and the journey was uneventful. ”
- “ The roadworks are now finished at junction 15, on m4, which has made traffic run smoothly ”

Fairly satisfied: Example comments (South West)

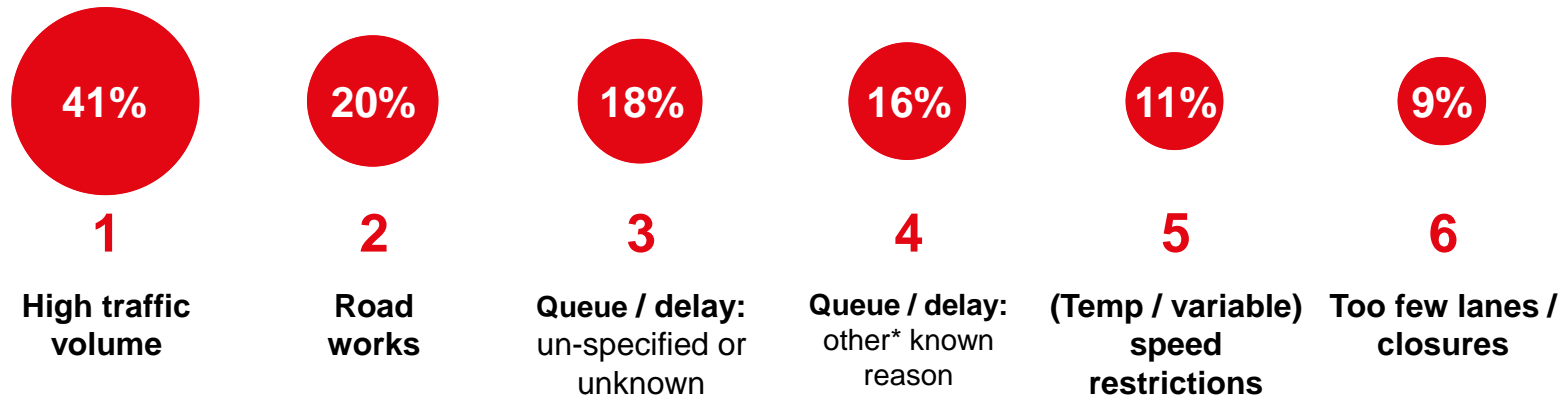
- “ Traffic was ok (not brilliant but I've used that road before and expected some traffic at that time, especially with train strikes going on that weekend) the road is easy to use, nice surroundings and smooth tarmac ”
- “ Pot holes on the A303 Ilminster bypass ”
- “ Reasonable visibility, traffic and road condition ”
- “ The road is dual carriageway but from the main turnoff onto Gloucester it is, for about a mile, single carriageway which causes huge tailbacks at all times of day. ”
- “ Fine except for a lorry driving very close behind ”
- “ No queues particularly at the Birdlip end which can be dreadful ”
- “ Got there on time but lucky I left time to make it on time ”
- “ The road was fairly full of cars, so the journey took longer than it normally does in winter. ”

Though infrequent compared to other regions, **congestion is the main reason for dissatisfaction in this region** when it does occur

Strategic road users were asked **why** they were satisfied or dissatisfied with their journey, in their own words. We have quantified the key themes which arose, from a random sample of their responses.

Dissatisfaction: top reasons

(very / fairly dissatisfied, South West) % mentioning topic



Dissatisfaction: other reasons

(very / fairly dissatisfied) % mentioning topic

Road condition (poor)	7%
Safety	7%
Chronic issue	7%
Poor / misleading signage / info	7%
Smart motorway-related	7%
Other	20%

Note that while roadworks are often among the most common causes of dissatisfaction, delays for other reasons can be more impactful when they happen. For journeys affected by roadworks, 21% are dissatisfactory, compared to 35% when affected by other types of delays, and 52% where traffic is congested for any reason.

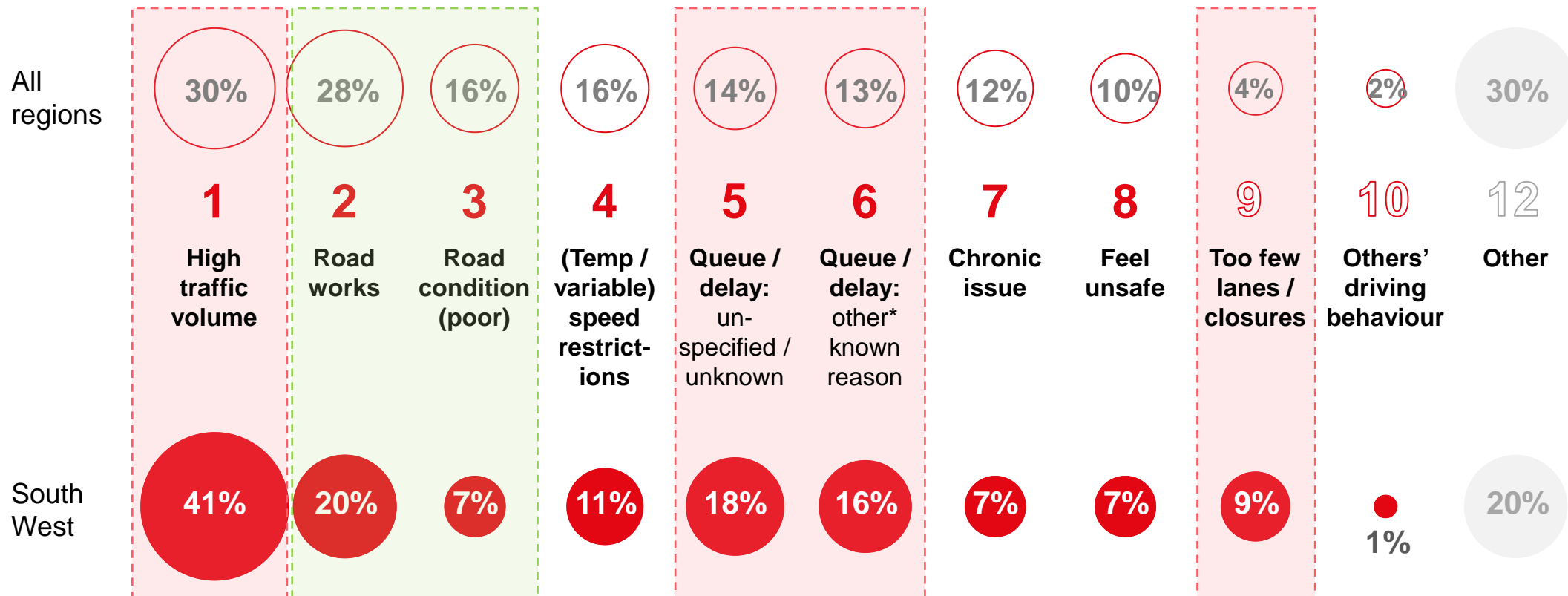
Together with qualitative feedback as here, this suggests that there may be some more tolerance for “deliberate” disruptions – about which drivers can be informed in advance – but congestion and delays, especially if unexpected or (perceived as) avoidable, are less acceptable. Information doesn’t solve, but can help to mitigate, these scenarios..

Base: sample of those giving a rationale for overall satisfaction rating Oct 21-Sep 22 – dissatisfied, South West (45), all regions (200)

* i.e. not (only) roadworks, speed restrictions / traffic volume; includes accidents, stranded vehicles, debris, and traffic management infrastructure like roundabouts, traffic lights, etc., for example

This – and resulting queues – is more often the cause of dissatisfaction in South West than elsewhere. Perception of too few lanes also contributes.

Dissatisfaction: top reasons – South West comparison to average
(very / fairly dissatisfied) % mentioning topic



Base: sample of those giving a rationale for overall satisfaction rating Oct 21-Sep 22 – dissatisfied
 All regions (200), South West (45)

 Less common in this region than average
 More common in this region than average

Reflecting all of this, while complaints are less common here than elsewhere, congestion dominates when drivers do have them, and can cause real frustration

Dissatisfied (very/fairly): Example comments (South West)

*“ Traffic jams almost all the way!
Stopped at service station, couldn't
cater for the amount of cars!! ”*

*“ Overpopulated, far too
much congestion ”*

“ Holiday traffic ”

*“ ...Bristol ring road is a disappointment!!! For us
people on the Mendips the road system is a total
disgrace, Bristol has the only ring road where you
have to go back towards town to get out!!! Or...
take a 44ton lorry through small villages! Any other
major city has good well planned ring roads that
are dual carriage way!!... ”*

*“ Roads were easy enough to
navigate and in seemingly good
condition. Just an extreme
amount of congestion ”*

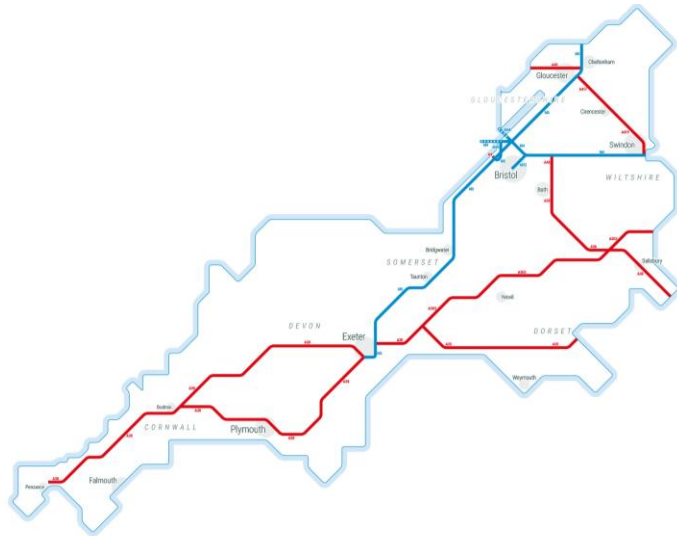
*“ Too many hold ups due
to large volume of traffic ”*

Further patterns for major A roads and motorways in the South West



As elsewhere, there is of course a range of experience within the region, with the M5 and A303 delivering two extremes

Overall satisfaction by road / road type within South West



South West

All roads **80%**

(All regions 72%)

Motorways **82%**

(All regions 72%)

Major A roads **78%**

(All regions 73%)

Overall satisfaction by road*

M5 81

A30 78

M4 74

A38 74

A303 69

*Results shown for individual roads where sample size is ≥ 75

All data at road level based on Apr '21 – Sep '22.

All Motorways: All regions (3,902), South West (387). All A Roads: All regions (3,420), South West (530)

Journeys on the A303 epitomise much of the experience – and many of the issues, where they exist – of the SRN in the South West

A303

Traffic volume variable but congestion hits hard when it happens – an issue which is felt to be chronic, and which is often caused by single-carriageway sections that are perceived as insufficient for level of usage

Key metrics

	Overall satisfaction	J'ny time	M'gmt of roadworks	Feeling safe
A303	69%	69%	Small sample size	79%
avg.	73%	71%		82%

Other aspects of experience*

Road condition	Signage	Joining/leaving	M'gmt delays
			Small sample size

Impactful journey features

	A303	avg.
Heavy / cong' traffic	26%	21%
Roadworks	17%	23%
Other delays	30%	15%

Drivers' free-text feedback highlights **difficulty caused by too few lanes in context of vehicle mix**

(Note: Stonehenge congestion is mentioned, but is not a dominant topic)

“A358 and A303 need major upgrade to dual carriageway”

“Very busy at Stonehenge, and all other parts from two lanes to one”

“I know the road very well. It's an annoying road with fairly regular changes of carriageway but I had plenty of time”

“Many large vehicles and tractors that could not be passed, particularly through Blackdown Hills and other single lane areas. As usual impossible to take a break in the lay-bys. Closed or full”

Other delays perceived to be caused by **congestion** and **slow vehicles**, and an especially high proportion of those affected say **they expect such delays**

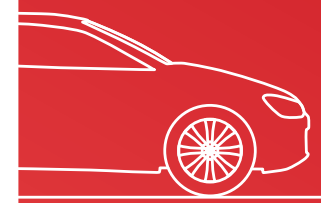
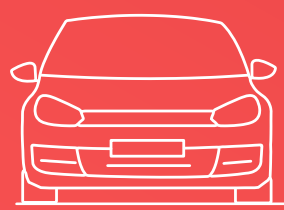
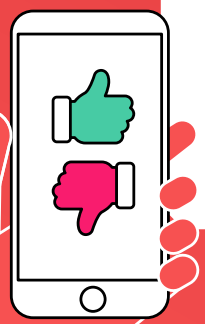
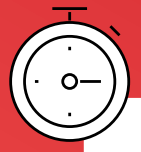
Frustration around capacity on A303 comes partly from the fact that it is structural with no easy resolution, but partly from usage context, with slightly higher emphasis on work / commute journeys than across the South West as a whole.

(And while it is rated well overall, **when M5 users are dissatisfied, their comments also focus mainly on congestion, often with reference to holiday periods.**)

Can more be done to -->

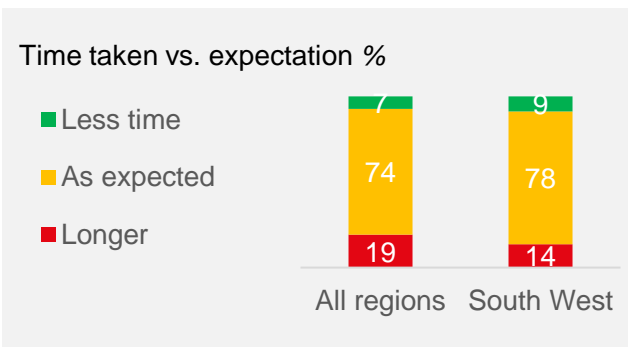
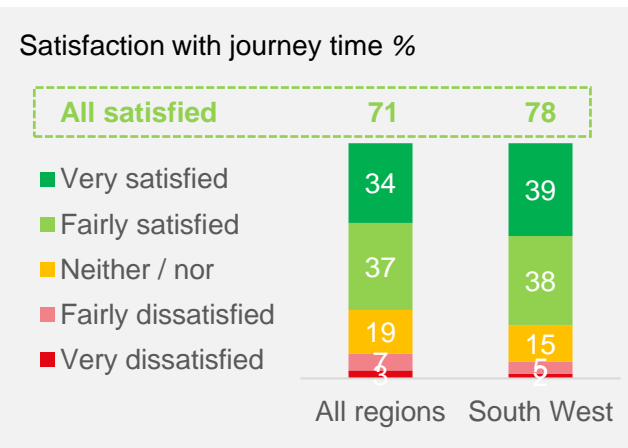
- Ease frustration among regular users, with salient communications about both shorter and longer term plans to address pressures on roads like these?
- Encourage a greater spread of travel times throughout the day, especially in peak leisure seasons?

More detail on:
Journey time



Users' experience of journey times on the SRN in South West

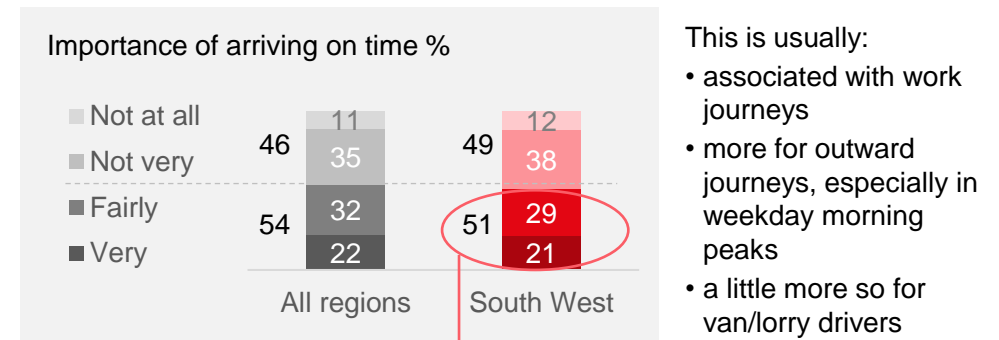
Journey times a little more satisfactory than the average, though with most journeys meeting expectations for time



Experience of journey times is similar on both motorways and major A roads here, and consistently above average

	Satisfied with journey time	Journey longer than expected
M M'ways		
All regions	71	20
SW	78	13
A Major A roads		
All regions	71	17
SW	77	14

Punctuality is overtly important in half of journeys



55% set off early (vs. 59% on average and lower than all other regions) ...allowing **24 mins contingency** (vs. 24 mins on average)

Setting off early is associated with same-day commuting journeys, especially in morning peaks. However, in other contexts, even where arrival time is important, people are no more likely to allow contingency (perhaps they are not able to, e.g. among delivery drivers?)

Many people set off earlier if they can, so **advance information on delays is vital**. Nevertheless, it cannot be assumed that they will or can do this, so **continued pressure is also needed to improve and protect journey times** where possible

Base: all SRN users surveyed, South West, Oct '21 – Sep '22 (918)

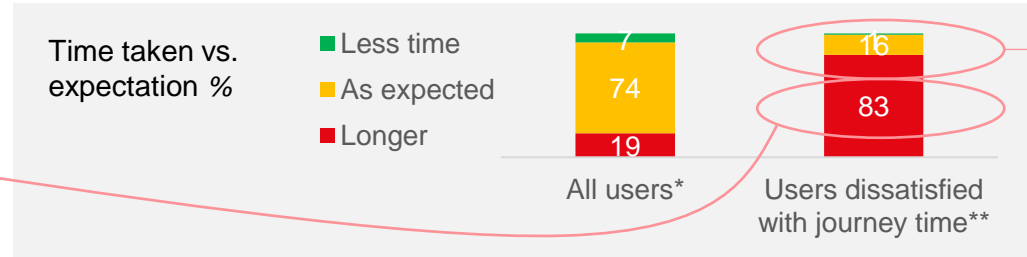
What causes dissatisfaction with journey time?

Findings on this page are at national level



Almost all dissatisfaction with journey times comes when the journey is longer than expected:

Similar pattern by region



...but there is also a substantial minority who **know their journey time will be poor, and this is indeed subsequently borne out**

When things don't go to plan

- Heavy traffic features in most journeys which are felt to take too long
- Roadworks also often contribute, but other types of disruption tolerated even less

Journeys with dissatisfactory duration**: % featuring...	(Benchmark: all journeys)
Roadworks	47 25
Other delays	59 17
Heavy / congested traffic	76 24

Base:
 *SRN users surveyed, all regions Oct '21-Sep '22 (6,849)
 **All dissatisfied with journey time (684)
 ***Delayed by xx mins due to roadworks / other (105-902)

When this means added time, there is **some tolerance for delays up to 15 mins for roadworks**, but **much less so for other types** of disruption



Longer term dissatisfactory road provision

Journeys that are expected to, and indeed do take longer than they should, are disproportionately prevalent....

- On major A roads
- In certain regions (especially SE and NW)
- Among frequent users, especially commuters or those travelling for other work reasons
- Weekday morning peaks
- OR after dark
- When weather is worse

And users' comments indicate that often (for c. 40% of journeys), they experience **ongoing issues that they perceive should or could be addressed**

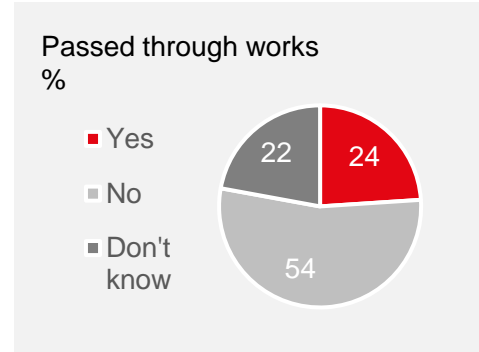
- “ Always surface water ...and always heavy traffic no matter what time of day [M6] ”
- “ Despite upgrades to the surface, [this road] is horrendous... It is so in need of being turned into a dual carriageway...and it is in constant need of repair due to the heavy traffic it takes [A120] ”
- “ Traffic volume...[it's] the only major road [here] ...so everyone uses [it] for every journey [A500] ”
- “ Stupid amounts of traffic lights that ...allow one car out of a pointless side road that barely anyone goes down [A47] ”

More detail on: **Experience of roadworks**



SRN users' experience of roadworks in the South West

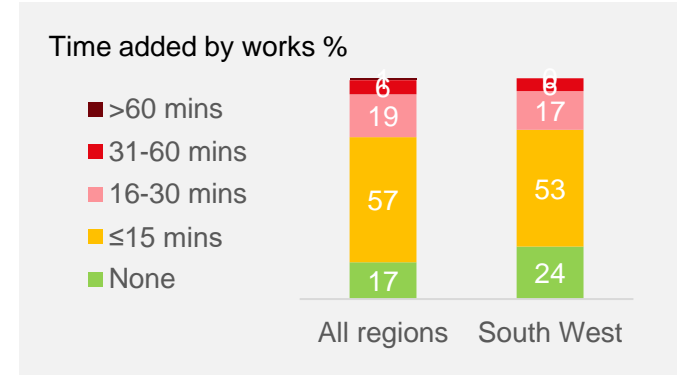
A quarter of journeys here passed through roadworks



Compares to all-regions average of 25% that passed through roadworks

As we saw, perceived incidence of roadworks also fell a little during the (busier) summer months of 2022.

Roadworks typically add a little less time to journeys than in other regions



And while only just over half are satisfied with roadworks management, South West outperforms all other regions



Compares to 49% on average.
Over a quarter are very satisfied here, vs. 16% avg.

Advance warning increases satisfaction with how roadworks are managed, and the earlier the better

(though satisfaction is low overall despite this)
This analysis is at all-region level due to smaller sample sizes

Satisfaction with roadworks management, among those who were....	Unaware	Aware after setting off (not before)	Aware before setting off
%	35	50	53

Inevitably it may be difficult to truly satisfy users in the context of a disrupted journey, but other factors in management of works can exacerbate this experience.

Comments from users who are dissatisfied with roadwork management highlight themes including:

- Perception of unreasonable impact:
 - Excessive number of encounters with works
 - Unnecessary length of road affected
 - Excessive duration
- Little evidence of work taking place in practice
- Unclear benefit (or explicit disagreement with purpose, especially relating to smart motorways)
- Speed restrictions, especially multiple variations and narrowed lanes
- Poor lighting or signage



Prior awareness of roadworks is relatively low in the South West, compensated for somewhat by signage and sat-navs en route

Only just over half of those affected were aware of roadworks ahead of the journey; previous exposure the main source of awareness



Awareness of works relies on previous exposure, but SW has among the lowest levels of previous exposure of all regions. Instead, radio makes small contribution overall but is very slightly more important here than elsewhere.

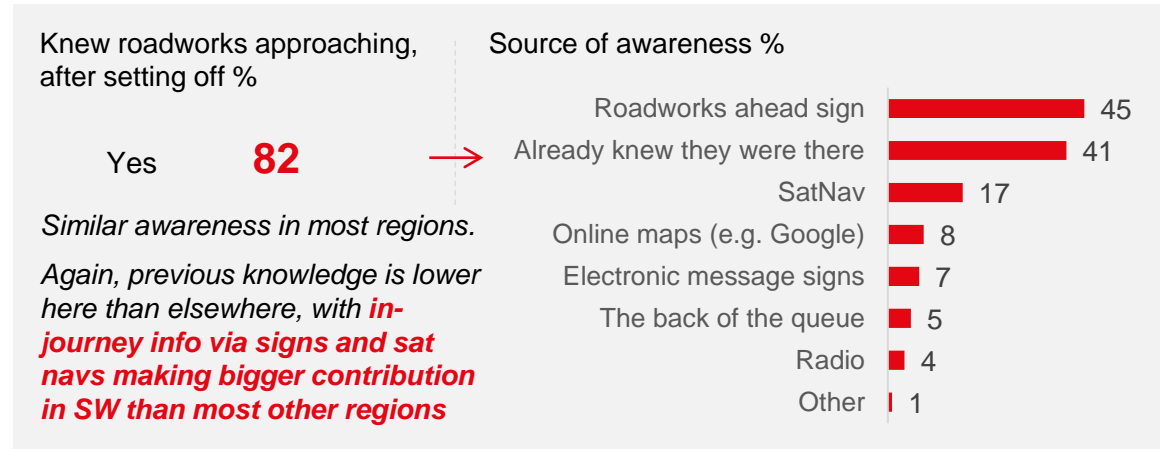
Reflecting this reliance on experience, advance knowledge of roadworks is associated with more frequent usage – especially commuters and professional drivers. **Those making less frequent journeys, typically for leisure (relatively more common here than elsewhere), are less informed.**

Likely linked to this, people are less informed when travelling off peak and at weekends, and in sunnier weather or, conversely, after dark.

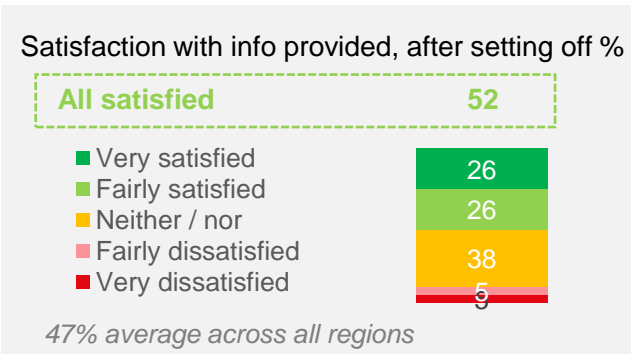
**Can more be done in periods of higher leisure travel, and with particular focus in this region, to target less-informed groups in advance?
Can more be done around road-side signage visibility, especially in the dark?**

Base: All affected by roadworks in the South West (197)

Most were aware they were approaching roadworks as they made the journey: own experience again important here, along with road signage




In this context, in-journey information is satisfactory to half of those who were aware of approaching works, slightly higher than all other regions



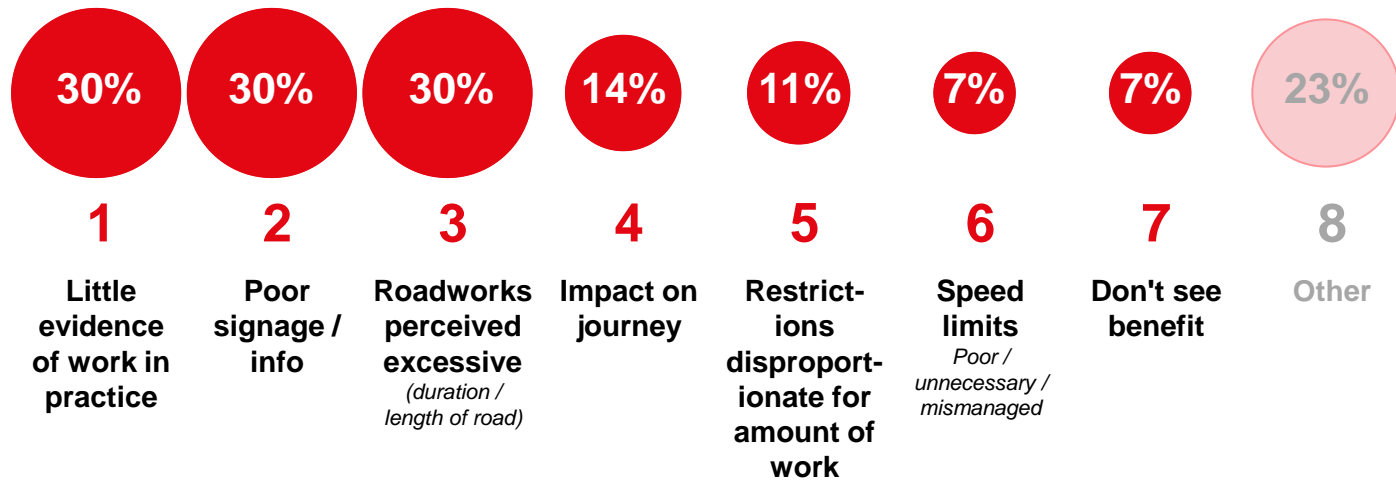
Information from any source aids satisfaction here. Unsurprisingly, dissatisfaction more likely when roadworks are only known about when already in a queue

Dissatisfaction with works management usually driven by apparent absence of actual work, signage issues, and a general perception of there being too much, for too long

Strategic road users were asked **why** they were satisfied or dissatisfied with roadworks management, in their own words. We have quantified the key themes which arose, from a random sample of their responses.

Findings on this page are at national level 

Dissatisfaction with roadworks management: top reasons
(very / fairly dissatisfied)
% mentioning topic



Similar pattern overall for motorways and major A roads, though with some minor differences.

- M** Dissatisfaction with management of motorway roadworks is a little more often based on:
- the **perception that the length of road affected is excessive**
 - and/or that **restrictions in place are unwarranted** for the perceived amount of work underway

(Likely linked to this), motorway users are also:

- less likely to see the benefit of works
- ...but to experience greater journey impact


- A** Dissatisfaction with works management on major A roads is a little more commonly linked to:
- **duration**
 - **lack of work taking place in practice**

(possibly linked to higher familiarity with major A roads among those using them, compared to motorways)

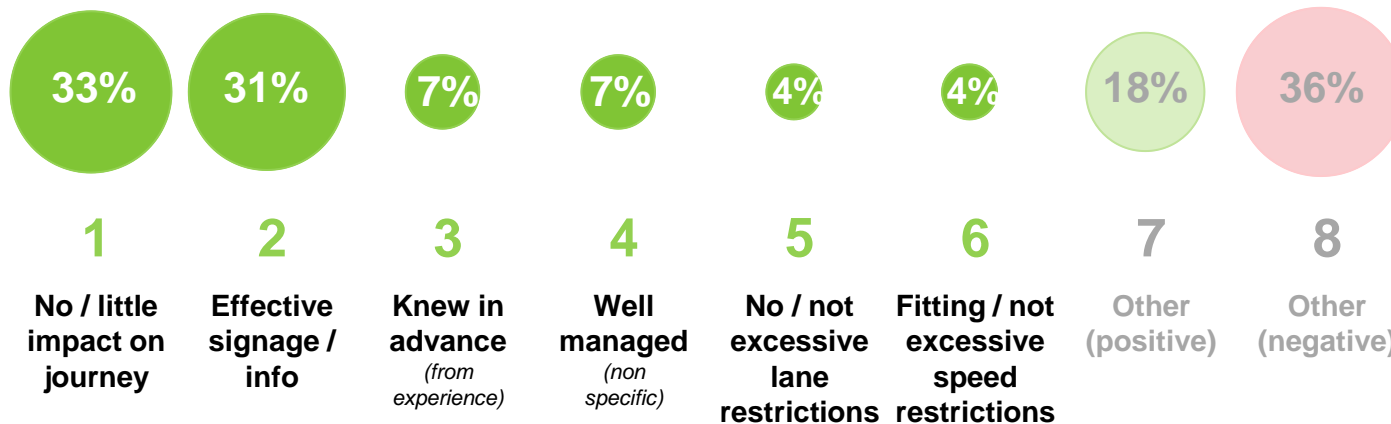
Analysis here is shown at all-regions level, and **qualitative feedback is similar in the South West.**

When SRN users are satisfied with roadworks management, it's typically due to little material impact, and/or that they feel informed

Strategic road users were asked **why** they were satisfied or dissatisfied with roadworks management, in their own words. We have quantified the key themes which arose, from a random sample of their responses.

Findings on this page are at national level 

Satisfaction with roadworks management : top reasons
(very / fairly satisfied)
% mentioning topic



(Those satisfied overall with roadworks management still have some negative comments)

Having little impact, and limited lane restrictions are more often mentioned for motorways

Information – especially signage – mentioned more often for major A roads

Similar pattern overall for the South West, though perceived impact tends to be lower again, and a higher proportion of affected SRN users here feel that works are at appropriate level, and not excessive

Base: sample of those giving a rationale for satisfaction with roadworks Oct 21-Sep 22
All (202), A roads (101), Motorways (101)

Free-text comments relating to roadworks span a range of issues

Findings on this page are at national level 

Perception of unreasonable impact

- “ Extreme number of roadworks / holdups meant I had to find a number of alternative routes. ”
- “ The amount and length of roadworks and variety of speed limits. ”
- “ There is too much road improvement work ...between very short distances ”
- “ Ringwood roundabout is a mess at the moment. Roadworks going on forever. ”
- “ Roadworks have been on this road for over a year and are still causing problems ”
- “ Constant road works ...There's been plenty of time to do these in the last 2 years when the motorway was quiet through covid ...but then when everything back to normal at... more road works ”
- “ There is a 40mph section that seems to have been extended by around 10 miles more than needed as it's for a very small piece of road improvement works in Colchester, but it starts near Chelmsford. ”
- “ That expensive roadworks near Sainsbury has been going on for years! It's really annoying. ”

Management measures

- “ Road works ...very badly lit ”
- “ Resurfacing roadworks ...with REALLY AWFUL diversions indicated ”
- “ ...miles of work has been completed but the reduction to only 2 lanes is still in place. The lane reduction needs removed for the first few miles as it's complete ”

Unclear / disputed benefit

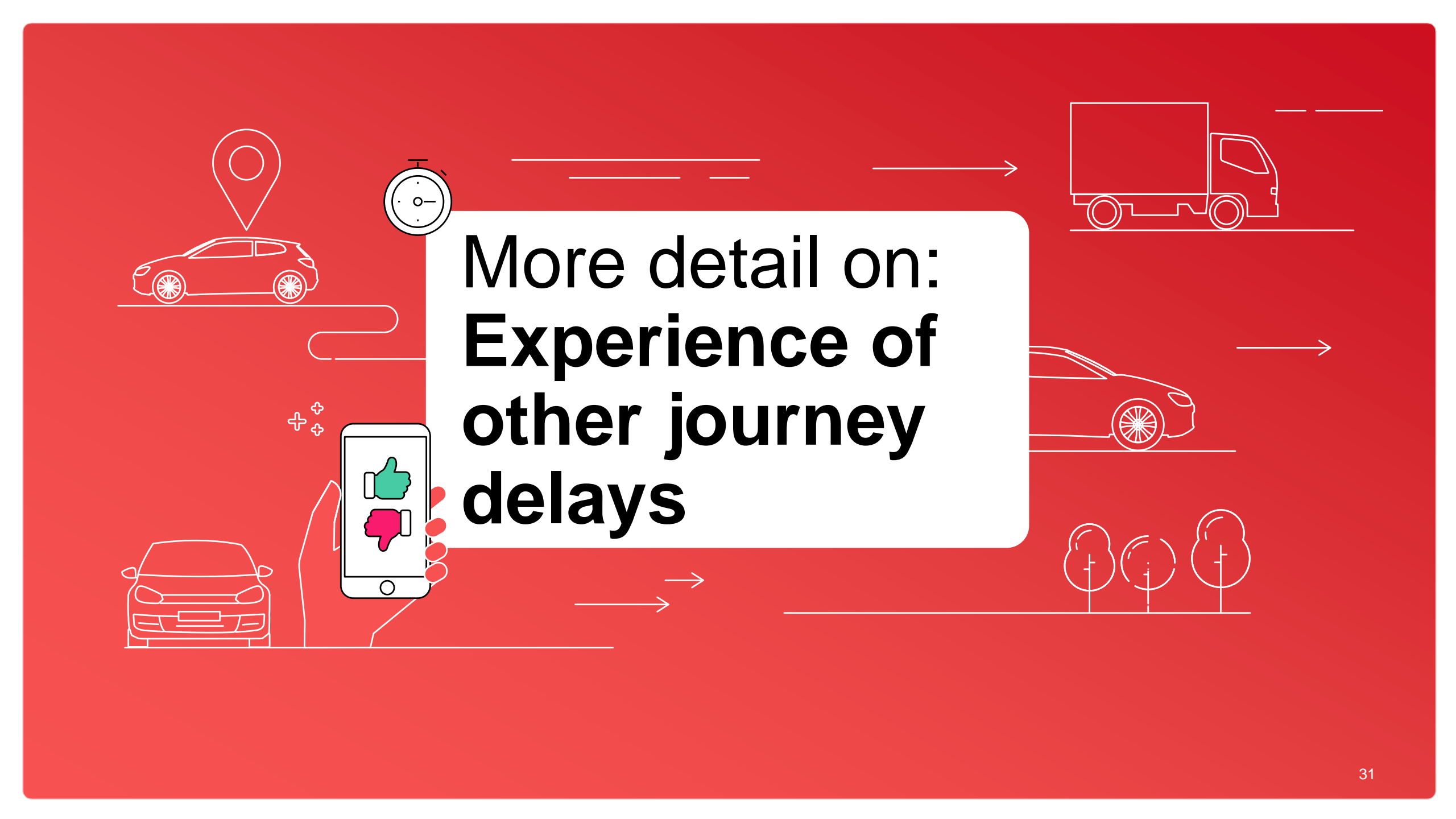
- “ Extensive roadworks and speed restrictions connected to creation of 'smart' motorway; a concept that is fundamentally flawed. ”
- “ Brexit-related roadworks, contraflows and speed restrictions still in place. ...a pain in the backside. One of the worst bits of motorway in the whole country. ”
- “ The "road improvements" they are implementing aren't even a token gesture in addressing the overall problem of the road being totally inadequate for the sheer volume of traffic that uses it. ”
- “ ...always some road closed, yet there are so many potholes on the very same fixed road after years of roadwork. ”

Little evidence of work in practice

- “ Too many road work obstructions with no work being carried out, i.e. traffic calming exercise. ”
- “ Traffic cones limiting lanes but no works apparently underway ”
- “ 40 MPH limit for a long stretch with no work being undertaken and no reason for the limit given ”
- “ Miles of lane closures but little work actually taking place ”

Keeping the impact of roadworks to a minimum is a real priority – with considerations for duration, length of road affected at any one time, and timing/placement of traffic management measures which are not perceived to be excessive

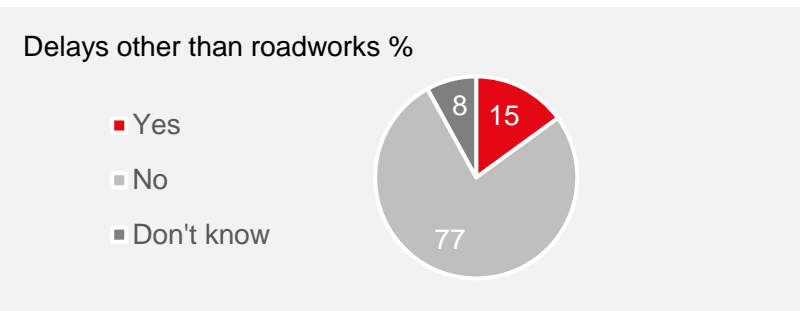
In addition to information to warn about the fact of works taking place, users may benefit from more – or more accessible – information about why works are taking place, along with the rationale for the measures used to manage traffic as they happen



More detail on:
Experience of other journey delays

Users' experience of other journey disruption in the South West

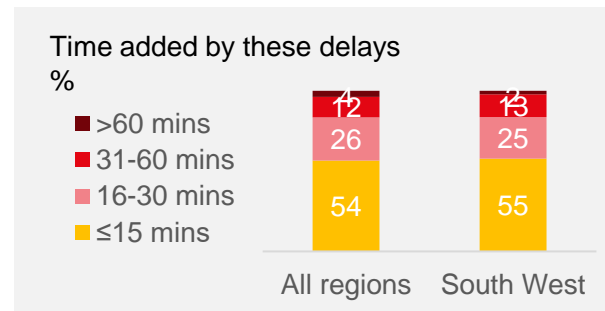
Relatively fewer journeys were delayed for other reasons



Among the regions with the lowest incidence of non-roadworks delays

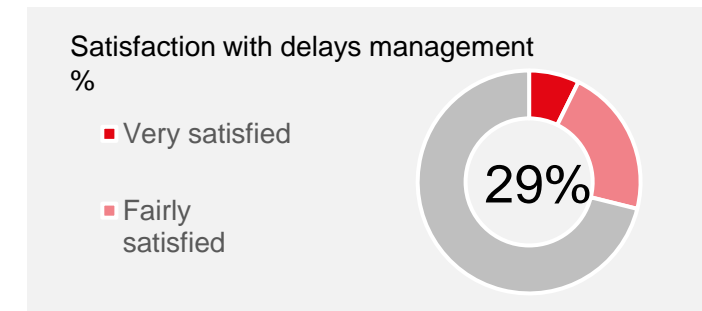
Similar pattern for motorways and major A roads at national level, and again in the South West

But these delays are typically longer than for roadworks



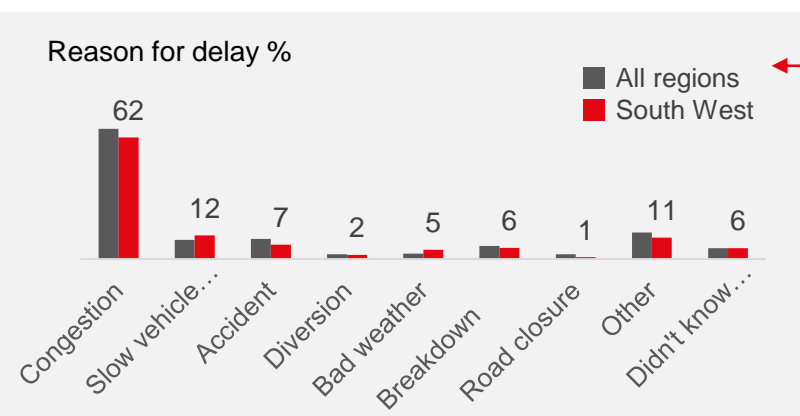
Delays on motorways typically a little longer than on major A roads.

...and only around a third of those affected are satisfied with their management



Slightly better experience of delay management here than elsewhere (with all-region average of 24%).

Nationally, delay handling is rated a little better on motorways than major A roads; in contrast, delays handled more consistently across both road types in the SW.



The reasons for delays follow a similar pattern to the all-region average

Motorways more likely to be congested, and major A roads more affected by slow vehicles.

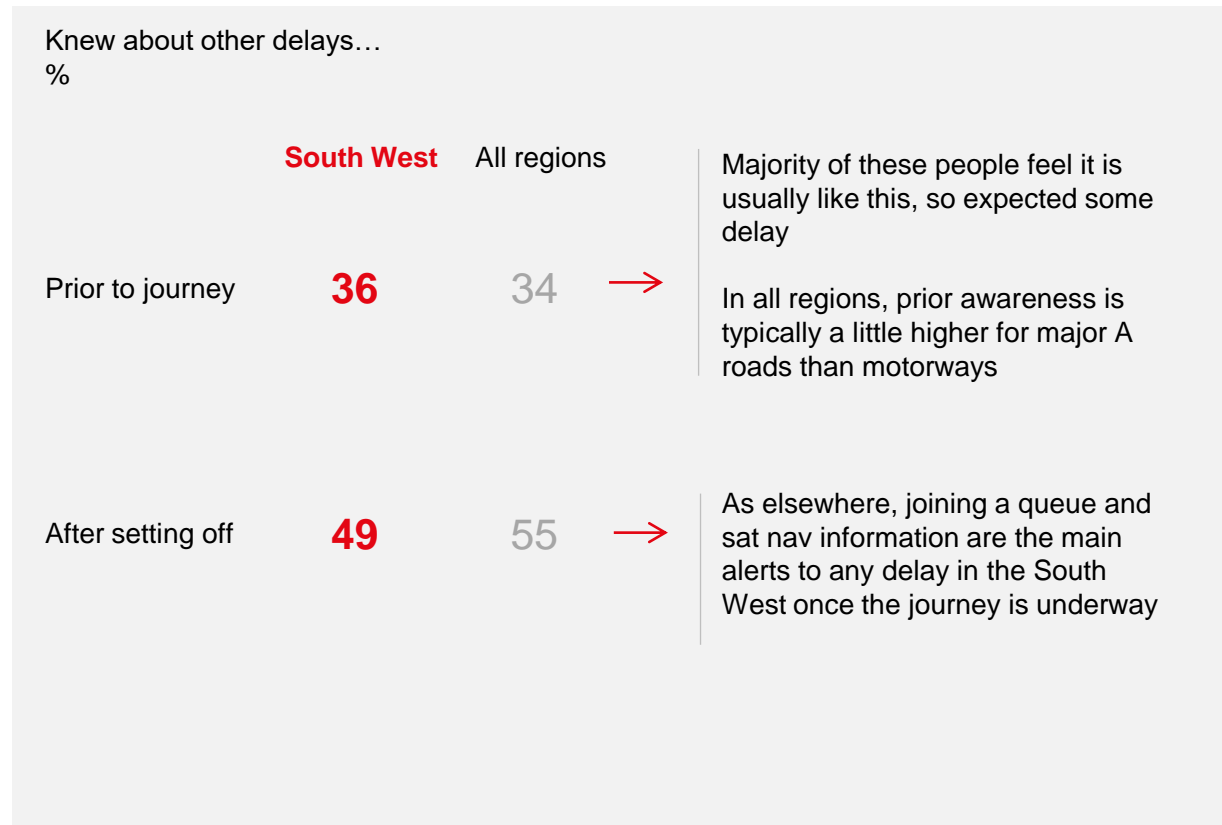
“ Despite setting out so early, which I do to avoid busy/heavier traffic, I was shocked to hit such a high & very slow volume of traffic on A30 that early in the morning! I'd say this constant stop starting added an extra hour or so to my journey. ”

“ There was an accident on the A303, closing it but not where we needed to drive. [But] the radio, the satnav and Google all told us that our part of the road was closed. ”

“ Traffic was at a standstill due to roads merging onto this road ”

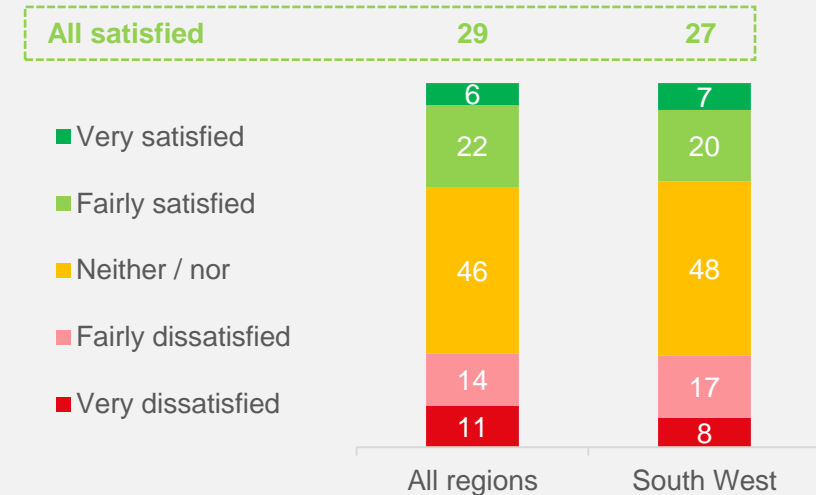
Finding out about other types of delay in the South West

Just over a third of those affected by non-roadwork delays were aware before making the journey, and just under half after setting off



...all leading to relatively low levels of satisfaction with delay-related information

Satisfaction with info about non-roadworks delays %



This pattern is similar across most regions.

Base: All affected by delays other than roadworks in the South West (143)



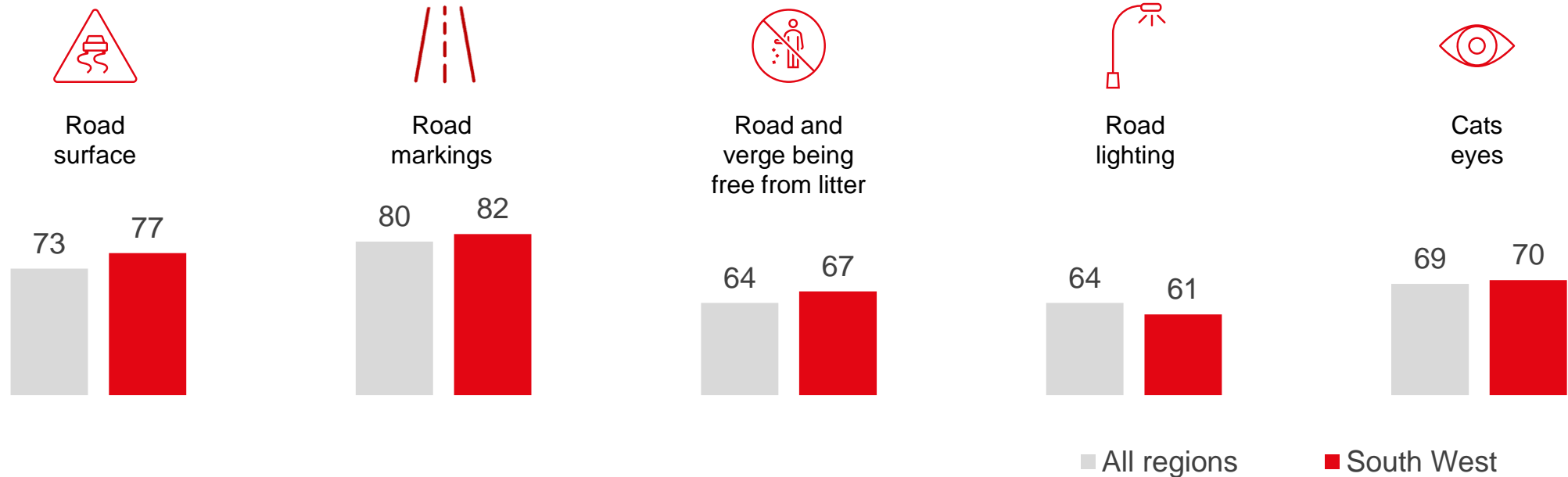
More detail on:

**Day to day
functioning of SRN**

Most are satisfied with road markings, but typically less so on other aspects of road condition. The South West is among the better performing regions on most of these points, but **litter and especially lighting are still quite poor**

Rating of road condition

% very / fairly satisfied, South West vs all-region average



Base: Road surface / marking / litter, all regions (6,212-7,234), South West (769-900)
Lighting / cats eyes, among those travelling after dark, all regions (1,058-1,158), South West (111-123)

What are the issues with lighting?

Findings on this page are at national level 

Recap: when we asked for comments in users' own words,

Lighting, cats eyes and road markings were mentioned as a reason for dissatisfactory journeys, by 2% of those who were dissatisfied overall:

Not one of the bigger issues, but important to some

At the very least, drivers often feel uneasy in these scenarios:

“ I don't like driving home when it is dark, but there were so many lorries on the road, which I had to pass and quite a few potholes, which I couldn't see or, tried to navigate ...The road was very dark and therefore difficult to manoeuvre. ”

Most common complaint is simply insufficient lighting

“ The [road] is not lit in this section which makes driving harder ”

“ ...the road... is VERY badly marked with the cats eyes and road markings being non-existent ... It is dangerous, especially in the dark or half light. ”

“ This road has enough traffic to warrant motorway standards. It is frankly dangerous as it has too many bends, poor junction layouts and no lighting. ”

“ Much of the initial journey from York was on unlit roads where it was difficult to travel at speed without high beams on, unfortunately this was not possible with oncoming traffic. Even without sufficient lighting there were sections of road with no cats' eyes (or they were[n't] very reflective). ”

But some other themes also arise in users' comments:

Poor lighting is **especially noticeable or impactful when affected by disruption like roadworks**

“ ...There was also roadworks which caused unexpected detours via some very dark single-track lanes. ”

“ Roadworks complicated the journey - watching out for road signs on a dark, wet night with slight traffic congestion ”

....or poor weather

“ Clear of traffic but low lighting so hard to see in the rain ”

“ No motorway lights in heavy rain makes it very dangerous to drive especially when there is traffic all the time ”

Lighting is often felt to be **important – and noticed as poor – when combined with other examples of poor maintenance**

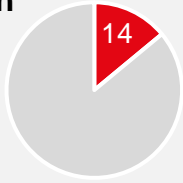
“ Poor lighting over grown road signs making it almost impossible to see directions ”

“ Poorly lit with unclear nearside verges ”

“ Long time spent driving on reduced carriageway in poor light with poor marking and uneven road surface ”

Little spontaneous comment on litter from users, but it can affect broader impressions of safety and maintenance

14% were dissatisfied with litter along the road and verge in this region



16% average across all regions



The majority of those commenting on litter / debris were **fairly** satisfied or dissatisfied with their journey overall – rather than having conviction either way

Comments from these people indicate key themes in what the presence of litter means to users →

Unightly, if not materially affecting journey time and therefore the overall journey

“ The road side edges are a bit of a mess now - sad as it is a relatively new road ”

“ ...Plus, the ugly sight of the horrendous littering on the A1, all the way!!! ”

“ No delays but huge litter on the slip roads. Please remove all the litter ”

Vegetation also contributes to untidy appearance

“ Weeds too high on the banks and barriers ”


Growing environmental consciousness may also heighten awareness and concern for impact of litter?

“ Litter everywhere especially plastics on the hard shoulder and central reservation ”

...although people do sometimes experience – or fear – more **tangible effect**

“ ...such a shame is the amount of rubbish on the sides of the roads ...[which] has got much worse. They used to pick up rubbish - what has happened? It is dangerous if it gets on the road and also it is a fire hazard. ”

“ The hard shoulder always has rubbish and debris which worries me if I need to pull over ”

Findings on this page are at national level unless stated 

Implication that roads are not maintained in other ways

“ The rubbish on the side of the road is disgusting. Admittedly people shouldn't drop litter but it appears that you do very little to maintain the road. It's embarrassing. ”

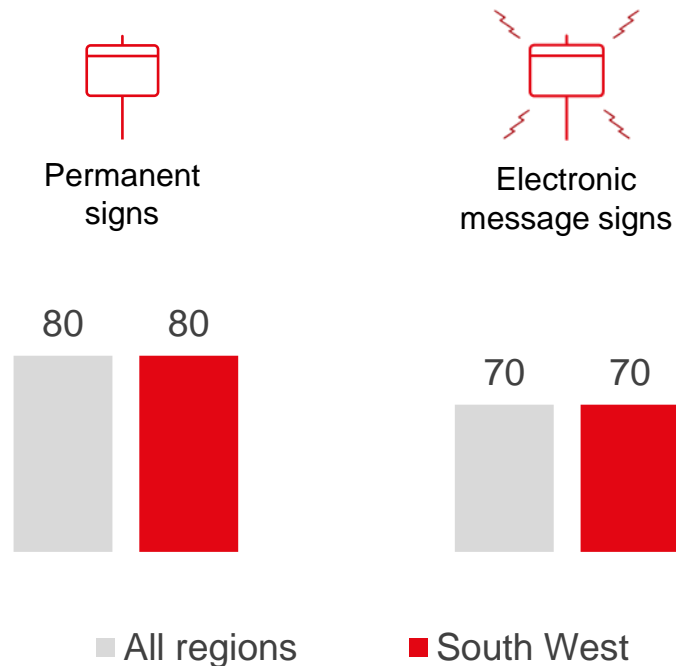
And possibly draws more attention to other evidence of poor maintenance?

“ Several badly repaired potholes and litter on the edges of the road. ”

The South West performs similarly to the national average for signage overall, though electronic signage is less prevalent than elsewhere

Rating of signage

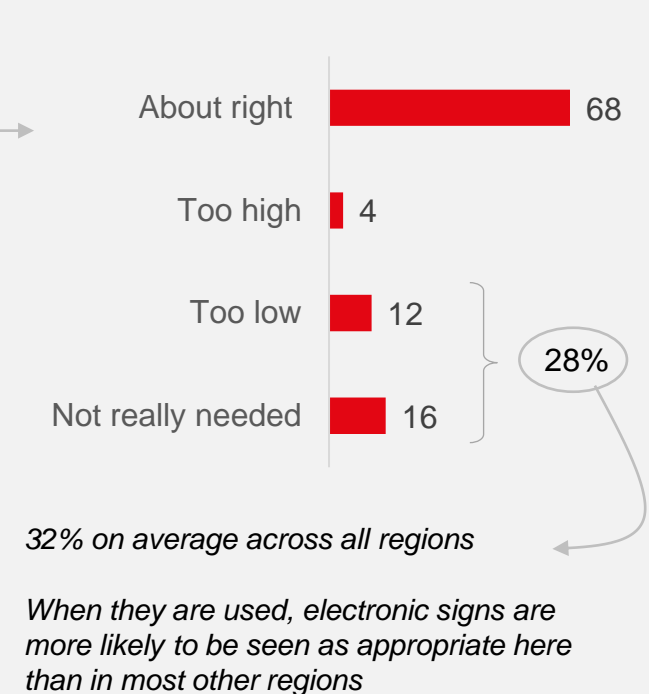
% very / fairly satisfied, South West vs all-region average



Saw electronic signs % South West



Appropriateness of electronic speed limits for conditions % South West

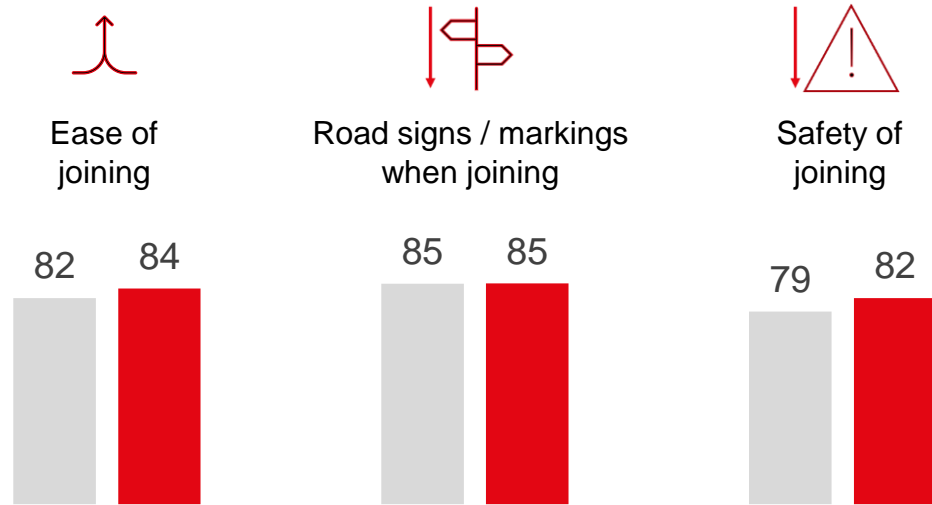


Base: Permanent signs (6,937), South West (877)
Electronic signs, among those having seen them, all regions (4,906), South West (547)

Most users satisfied with joining / leaving SRN; leaving a marginally smoother process. Little regional variation.

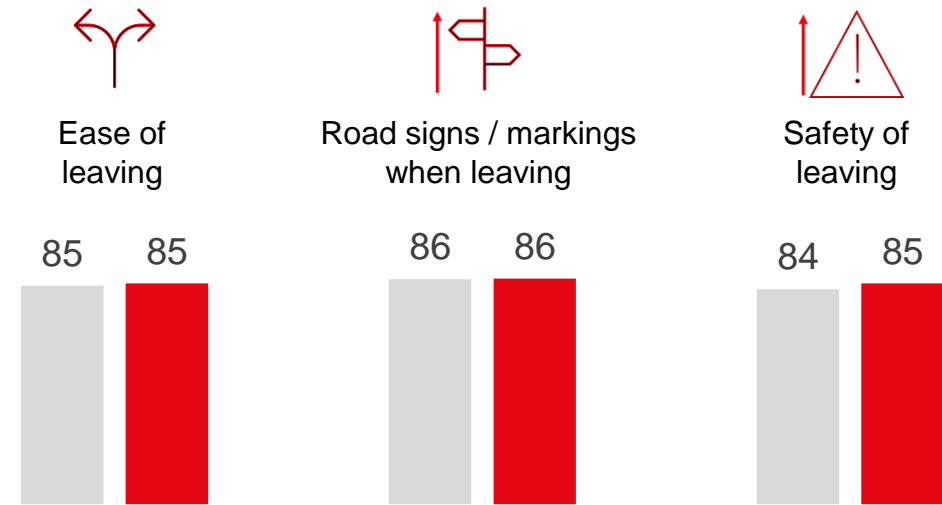
Rating of joining

% very / fairly satisfied, South West vs all-regions average



Rating of leaving

% very / fairly satisfied, South West vs all-regions average



■ All regions

■ South West

Base: all regions (7,182-7,264), South West (900-913)



Focus on other topics

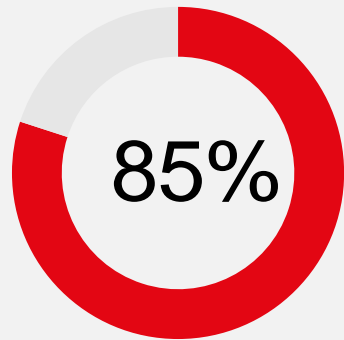
Using and sharing the road comfortably
Some smaller driver groups
SRN users and smart motorways

Learnings relevant to all regions

Safety perception and confidence high overall, but some groups feel less at ease: **nervous, infrequent drivers, smaller commercial/goods drivers, motorcyclists**

Most users felt safe on the roads

Felt safe when travelling
(very/fairly safe)



80% on average across all regions.

85% in the South West

Across all regions, we see lower feelings of safety for three key groups



Inevitably, feeling safe is linked to pre-existing confidence:

Nervous drivers

	Not confident on...
	A roads M'ways
Felt safe %	61 62

These less confident SRN users are more likely to be:

- Older (60+)
- Women – particularly for confidence on motorways
- Less frequent and lower mileage users of SRN

...But conditions and contexts for individual journeys can also make for safety concerns even among confident drivers and/or those who are familiar with SRN roads

Lighter commercial vehicles*

Confident: A roads	93	*Vans <3.5t
Confident: M'ways	93	L/HGVs ≤12t
Felt safe	76	

Key factors include:

- Heightened risk sensitivity via profession

“ This is a smart motorway...for my job in the fire service I have been called to serious accidents caused by smart motorways ”

- Conditions in specific vehicle context

“ ..very noisy, lots of mini potholes. Too aggressive for the van ” *“ ...nothing done to counteract the cross winds...no signage ”*

- ...and some temporary, unfamiliar users

“ Never driven on a motorway in a van ”

- This group also more likely to travel in weekday peaks; and LGVs more likely to travel in poor weather and after dark – all factors contributing to safety.

Motorcyclists

Confident: A roads	94
Confident: M'ways	84
Felt safe	62

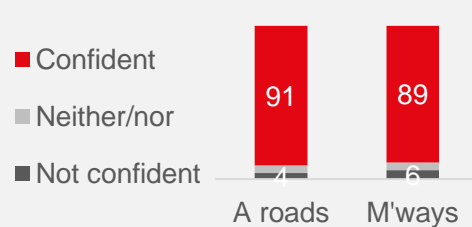
Key issues are:

- Other road users' behaviour, especially in giving enough space
- Road surfaces

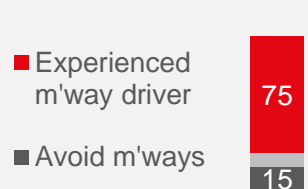
See more on motorcyclists' experiences later in this report.

Findings on this page are at national level unless stated

Confidence %



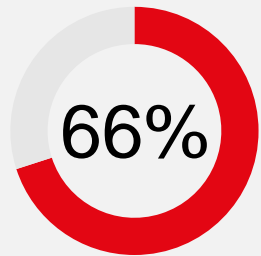
Motorway fluency %



Safety: All (7,313), Nervous on A roads (94), Nervous on m'ways (131), Light commercial (421), Motorcyclists (138). Confidence: All (5,375), Light commercial (421), Motorcyclists (88-90)

Poor driving is perceived as common, but while many are comfortable with speed (esp. on motorways), few see their own speeding as a risky behaviour

Experienced poor driving behaviour



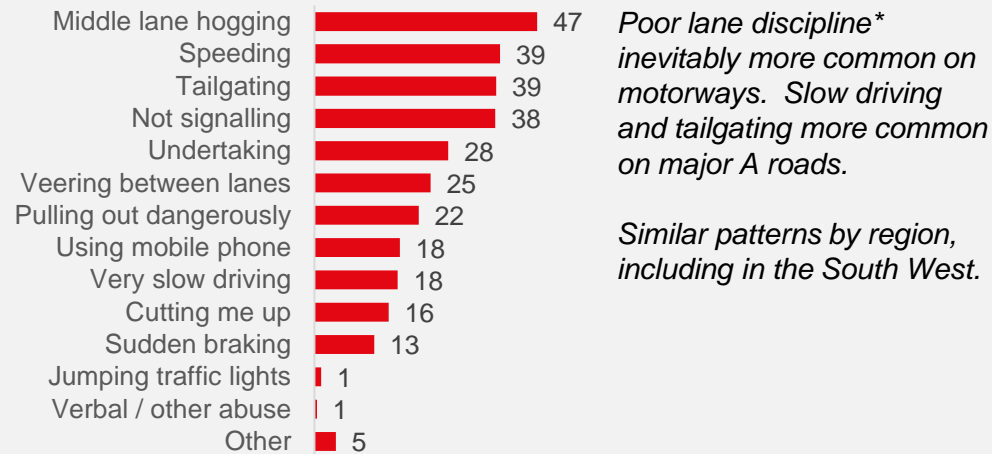
70% on average across all regions; **the South West is the lowest of all regions**

Poor driving by others is more common/noticeable on motorways, at 74%, vs. 63% on major A roads. This pattern is similar across regions with a few variations – with perceived poor driving on Midlands motorways and major A roads in the M25 area in particular

Attitudes to risk and speed %



Types of poor driving seen %



Poor lane discipline inevitably more common on motorways. Slow driving and tailgating more common on major A roads.*

Similar patterns by region, including in the South West.

Those willing to drive fast, exceed speed limits and take risks are more likely to be:

- Male
- Under 60
- More frequent drivers

...and are a little more likely to drive cars (rather than vans, lorries, buses), and newer, especially diesel vehicles.

These attitudes are also more common in the South East and M25 area.

Among those not prepared to take risks:

- 24% are still happy to speed on motorways (vs. 56% of those expressly prepared to take risks)
- 13% speed on major A roads (vs. 43% of acknowledged risk-takers)

Findings on this page are at national level unless stated



Although not in all cases, many attribute others' poor driving behaviour to features or management of the roads themselves

“ Experienced some bad driving, a few cars undertaking ”

“ It is always so busy. Congested. People drive too close to each other and there are road works so the lanes are smaller. ”

“ Very busy. This causes some idiotic driving by impatient drivers. This is not a safe road. ”

“ There were numerous drivers driving in lane 2 when lane 1 was free forcing everything out around them. Poor adherence to variable speed limits ”

“ Loads of people speeding, tailgating, brake checking, all in the fog, dangerous. ”

“ It's too busy, the roundabouts at A5 and Towcester are **confusing for many people and they cut you up because they are in the wrong lane**. There are too many roundabouts ”

“ Hate being tailgated at 50mph with the smart M27 motorway work. Hate how **drivers go manic when they get past 50mph restrictions. When the 'smart' M27 motorway opens I'll use the A27**. Having been shunted in Nov 21 during slow rush hour traffic **would hate to get shunted at speed with removal of hard shoulder**. ”


“ Road works and standard of driving tend to make journeys harder, vehicles under speed and lane hogging, **no one knows how to drive in roadworks** ”

“ The traffic was very slow due to congestion, **where the dual carriage ways came back to one lane, people used the fast lane to push into the queue of waiting traffic... So people drove down the middle section to try and stop this**, as they were just being pushed further back in the queue. ”

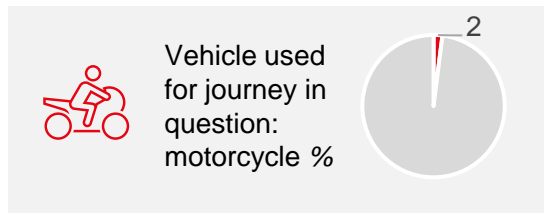
Findings on this page are at national level



The experience of motorcyclists on the SRN

Findings on this page are at national level 

Motorcyclists are a relatively small group within the survey

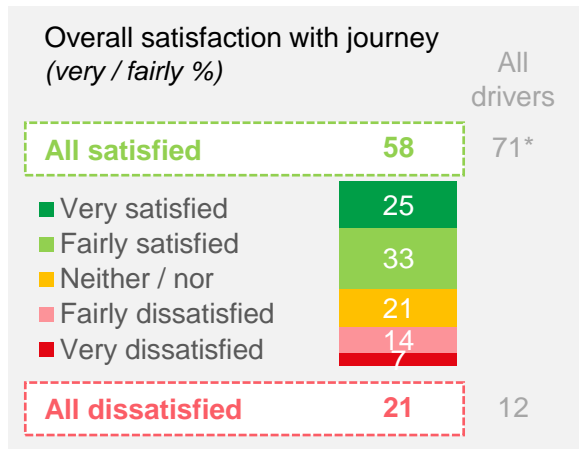


Confident on SRN, and attitude to speed may indicate particular expectation to travel swiftly

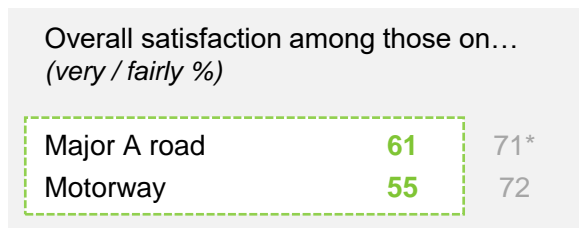
	Agree %	Disagree %
Confident: A roads	94	4
Confident: Motorways	84	10
Even slightly exceeding speed limit is less safe	51	34

...and experiencing similar levels of congestion and roadworks to others, but a little more affected by other delays

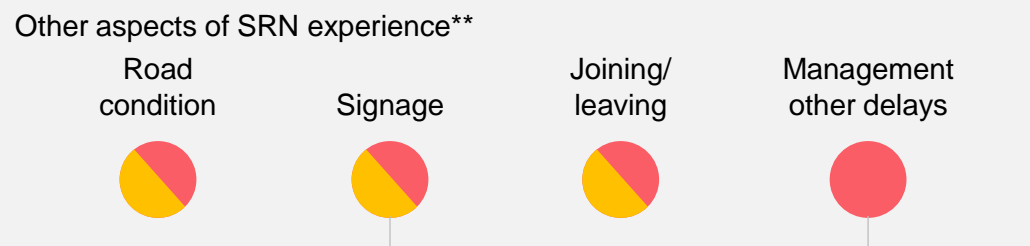
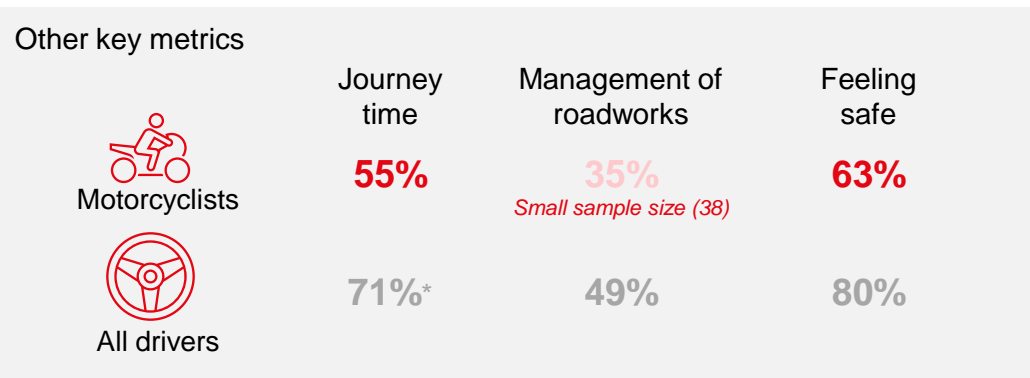
Notable for having some of the poorest SRN experiences



...and are a unique group in that their experience on major A roads is better than on motorways (reflecting their relatively lower confidence on motorways)



...which extends across most aspects of their journeys



Permanent signage is equally satisfactory for motorcyclists and all drivers, but **electronic signage is rated poorly**. Reflected in only two thirds of motorcyclists agreeing that overhead electronic signage is accurate, when asked about this directly

Lower advance awareness, and lower satisfaction with information given in advance or during journeys

Motorcyclists Apr '21 – Sep '22 (185), using m'ways (79), A roads (106). *Note: time period used on this page is 18 months to Sep '22, in order to increase sample sizes for motorcyclists.

"All drivers" results shown here use the same period, so are slightly different from annual figures given earlier in this report.

** "Traffic lights" used here indicate how motorcyclists rate the range of measures within each of these topics (e.g. "Road condition" covers surface, lighting, markings, cats eyes, litter), compared to ratings from all drivers. Sample sizes are typically smaller on some of these measures individually, so we are presenting an overview of experience (which also takes into account qualitative feedback via free-text comments in the survey, rather than fully quantified results.) See pg 52 for more detail.

Key reasons for motorcyclists' poorer overall experience: other drivers' presence and behaviour, and feeling a greater impact when things go wrong

Top reasons given for dissatisfaction:

Key themes in motorcyclists' free-text rationale for overall dissatisfaction

Volume of traffic

Poor road maintenance

Others' poor driving

Too few lanes

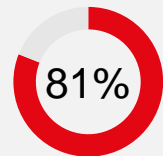
HGVs / slow vehicles blocking the way

Road condition/ maintenance and other road users have relatively higher importance here than for other groups

“ Road wasn't too busy, which from a safety point of view is important on a motorbike ”

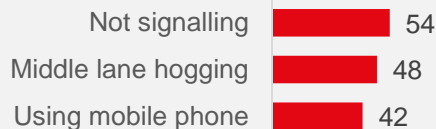
Virtually all journeys feature concern about other drivers

Experienced poor driving behaviour



Compared to 70% of all drivers

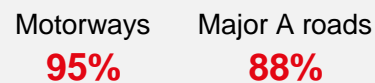
Types of poor driving seen: (top 3, %)



In particular, not signalling and using mobiles are bigger issues for motorcyclists vs. other drivers

...particularly on motorways

Other road users are my biggest worry on... (% agree)



This is often due to people being **inconsiderate**, but can be a **consequence of road management measures or conditions outside of individual drivers' control**

“ I feel other vehicles do not give proper space to a motorcycle ”

“ The amount of heavy, commercial vehicles, made me feel very wary of my vulnerability ”

The impact can feel greater when journeys do not run smoothly



When road surfaces are poor, it really matters

“ Slippery substance on roundabout resulting in me crashing and causing much damage to my new bike ”

“ There are a lot of uneven repairs causing ridges and pot holes ...a hazard to motorcycles ”



Management of delays (especially when non-roadworks related) is felt to be poorer by motorcyclists*:

- Less advance knowledge and fewer sources providing information (less access to radio/sat nav than others?)
- Dissatisfaction with any information received, including on electronic signs



And when movement is restricted by traffic controlling measures:

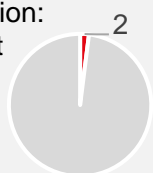
- Frustration felt by all drivers may be amplified in this group with its relatively higher expectation of speed and manoeuvrability
- ...and reduced agency can increase the sense of vulnerability

“ ...no correlation between the speed restriction and conditions at the time...It's even had me doing 40 mph on my scooter at 05:00 when the motorway has been clear and it feels really dangerous. To be stuck doing 40 mph, in the 3rd lane of a 4 lane motorway... at night and with HGV's behind, is really scary and quite often has forced me to leave the motorway. ”

The experience of HGV drivers on the SRN: overview

Another relatively small group within the survey

Vehicle used for journey in question: HGV/ LGV >3.5t %



Almost universally confident on SRN (96%)

Describe themselves as risk averse and unlikely to exceed speed limits.

More likely than other groups to be affected by congestion, roadworks and other delays (likely being unable to find suitable diversions as easily, or travel at another time), and for this to add more time.

These issues are reported more often on major A roads than motorways, among this group.

Only two thirds of journeys are felt to be satisfactory

Overall satisfaction with journey (very / fairly %)



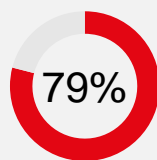
All drivers

71*

Similar on motorways and major A roads, though overall a little more positive about driving on motorways

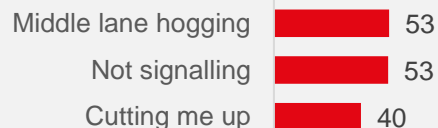
Most journeys feature poor driving by others

Experienced poor driving behaviour



Particularly felt by drivers of larger HGVs

Types of poor driving seen: (top 3, %)



In particular, not signalling and being cut up are bigger issues here vs. other drivers. Others' mobile phone use also often noted by HGV drivers

Satisfaction with journey time in particular is below average

Other key metrics



HGV / LGV



All drivers

Journey time

63%

71%*

Management of roadworks

42%

Small sample size (49)

49%

Feeling safe

81%

80%

Relatively low journey time satisfaction, in the context that arrival time is important in 3/4 these journeys (vs. 53% for all drivers), but that this group is no more likely (or able?) to set off early in mitigation.

Journey times rated notably poorer on major A roads

Key metrics typically lower for lighter (3.5-12t) lorry drivers than >12t HGV drivers – most notably on feeling safe

Other aspects of SRN experience*

Road condition



Signage



Joining/leaving



Management other delays



Higher advance awareness – due to previous experience – than other driver groups

HGV/LGV drivers Apr '21 – Sep '22 (158), using motorways (84), A roads (74). *Note: time period used on this page is 18 months to Sep '22, in order to increase sample sizes for HGV drivers.

"All drivers" results shown here use the same period, so are slightly different from annual figures given earlier in this report.

* "Traffic lights" used here indicate how HGV/LGV drivers rate the range of measures within each of these topics (e.g. "Road condition" covers surface, lighting, markings, cats eyes, litter), compared to ratings from all drivers. Sample sizes are typically smaller on some of these measures individually, so we are presenting an overview of experience (which also takes into account qualitative feedback via free-text comments in the survey, rather than fully quantified results.) See pg 52 for more detail.

Traffic volume, insufficient capacity, and difficulty sharing the road in this context, are common themes when HGV drivers feed back in their own words

Top reasons given for dissatisfaction:

Key themes in HGV drivers' free-text rationale for overall dissatisfaction

Volume of traffic

Too few lanes / closures, or narrow lanes

Roadworks

Others' poor driving

Road maintenance

Plus some specific issues such as lack of services or stopping places

And more than any other group, HGV drivers observe these issues to be ongoing

“ Traffic is very heavy for that stretch of single carriageway. ”

“ I try to hold lane one where possible to allow other road users to pass, however, there are parts of the [road] that are extremely poor surface quality with hundreds of potholes! This makes steering an HGV tricky! ”

“ Roadworks limiting to one lane for no obvious reason and very slow speed limits which change regularly again with no reason ”

“ ...dangerous as many road users do not know how to use [smart motorways] correctly...I find myself having to either undertake a vehicle in lane 1 which is going a lot slower or going over to lane 3 just to overtake 1 vehicle which is normally a car not driving to the road layout ”

“ Every Friday same story J10 to J8 crawling for no reason ”

“ Usual A14.... ”

Non-HGV drivers also observe some of the same issues from their different perspective

“ HGVs hitting their limiter trying overtake HGVs also hitting the limiter ”

“ A significant number of lorries were overtaking, despite there being clear “no overtaking” signs, which should have been adhered to in the time I was travelling. This led to tailbacks in the fast lane as the lorries take significant time to overtake. This added time to my journey. ”

“ A HGV did not move out of the inside lane to let me on the A34 so I had to slow down even though it could have moved into the outside lane. ”

“ Traffic heavy with HGVs only two-lane motorway and slow progress ”

“ For an A road there were an awful lot of lorries slowing everyone down on the single lanes. ”

“ Only 2 lane carriageway, should be at least 3 lanes, too many lorries. ”

“ Fairly satisfied, other than lorries driving too close to me. ”

Findings on this page are at national level





The experience of some other smaller SRN user groups



Drivers with a disability or long term health condition

A relatively small group:

- 68% affected in movement
- 28% have mental health / cognitive condition



More likely than others to...

- Make infrequent, shorter journeys
- Travel off-peak for non-work reasons
- Be retired, and female
- Be a little **less confident on m'ways**

SRN experience is broadly similar to other users – except perceived safety

Other key metrics	Overall satisfaction	Journey time	R'works mngmt	Feeling safe
Disabled	71%	70%	46%	76%
All drivers*	71%	71%	49%	80%

Poorer perception of safety likely linked to lower confidence. This group is also more sensitive to others' driving behaviour, which contrasts with their own risk-averseness.

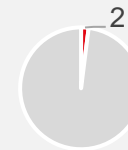
Note: this group is typically less forewarned of roadworks: likely due to lower frequency given their knowledge of works (like others) usually comes from previous journeys

Other aspects of SRN experience**			
Road condition	Signage	Joining/leaving	Management other delays



Electric car** drivers

Another small group overall



More likely than others to...

- Be of working age (and in work), and male
- Travel in weekday peaks, for commuting or business
- ...with **higher frequency and mileage** than others
- Be **confident**: more willing to drive fast, and typically experienced on motorways (though a minority avoid them, more than petrol or diesel drivers)

While most aspects of SRN experience are similar to other users, EV drivers rate information (both permanent and variable) poorly.

Other key metrics	Overall satisfaction	Journey time	R'works mngmt	Feeling safe
EV car drivers	73%	68%	<i>Sample size too small</i>	79%
All car drivers**	72%	70%	49%	81%

Feedback in other research suggests that the impact of when things go wrong is greater, given the potential need to recharge sooner than expected; this is likely influencing attitudes towards signage

Other aspects of SRN experience**			
Road condition	Signage	Joining/leaving	Management other delays
			<i>Sample size too small</i>

Drivers with disability (449); EV drivers (175). "Traffic lights" used here indicate how these groups rate the range of measures within each of these topics, vs. average. See pg 52 for more detail.

*Time period used on this page is 18 months to Sep '22, in order to increase sample sizes for these groups; "All drivers" results shown here use the same period, so are slightly different from annual figures given earlier in this report.

**Fuel type was only asked of car drivers. "All drivers" results here are relevant to all car drivers only for direct comparison with EV car drivers.



Users' experiences and opinions of the operation of smart motorways: a snapshot

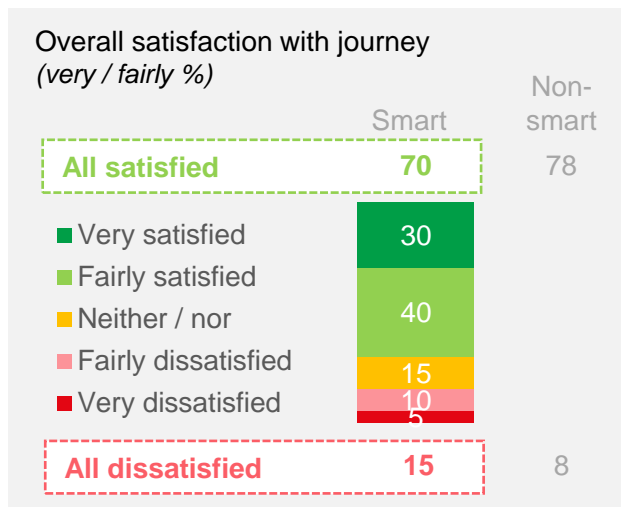
Many take the opportunity in this survey to express **disagreement with the concept, mainly around safety concerns from no hard shoulder**, as well as some frustration with variable speed limits

“ I have used the M42 for 40 years and since it has been a smart motorway it has been 4 lanes of stationary traffic during rush hour times. I no longer use the M42 during the rush hour because I cannot be certain that I will reach my destination on time. ”

“ I do not like smart motorways as they are a dangerous arrangement. Currently the M27 is being converted. Once completed I will avoid it. ”

“ ...the dangerous and stupid smart road which makes journeys take longer and is more dangerous ”

Satisfaction is lower overall among those using smart motorways



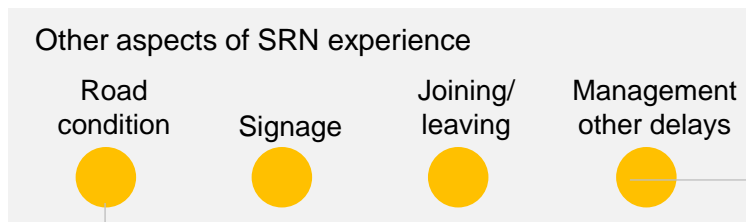
...especially for journey times and safety

Other key metrics	Journey time	R'works management	Feeling safe
Smart motorway	67%	48%	77%
Non-smart motorway	77%*	52%	85%

Journey times more likely to exceed expectations (27% vs 15% for non-smart motorways), be affected by heavy traffic / congestion (31% vs. 20%), roadworks (32% vs 23%) and other delays (23% vs 12%)

Others' poor driving – mainly lane discipline – also observed more often on smart motorways

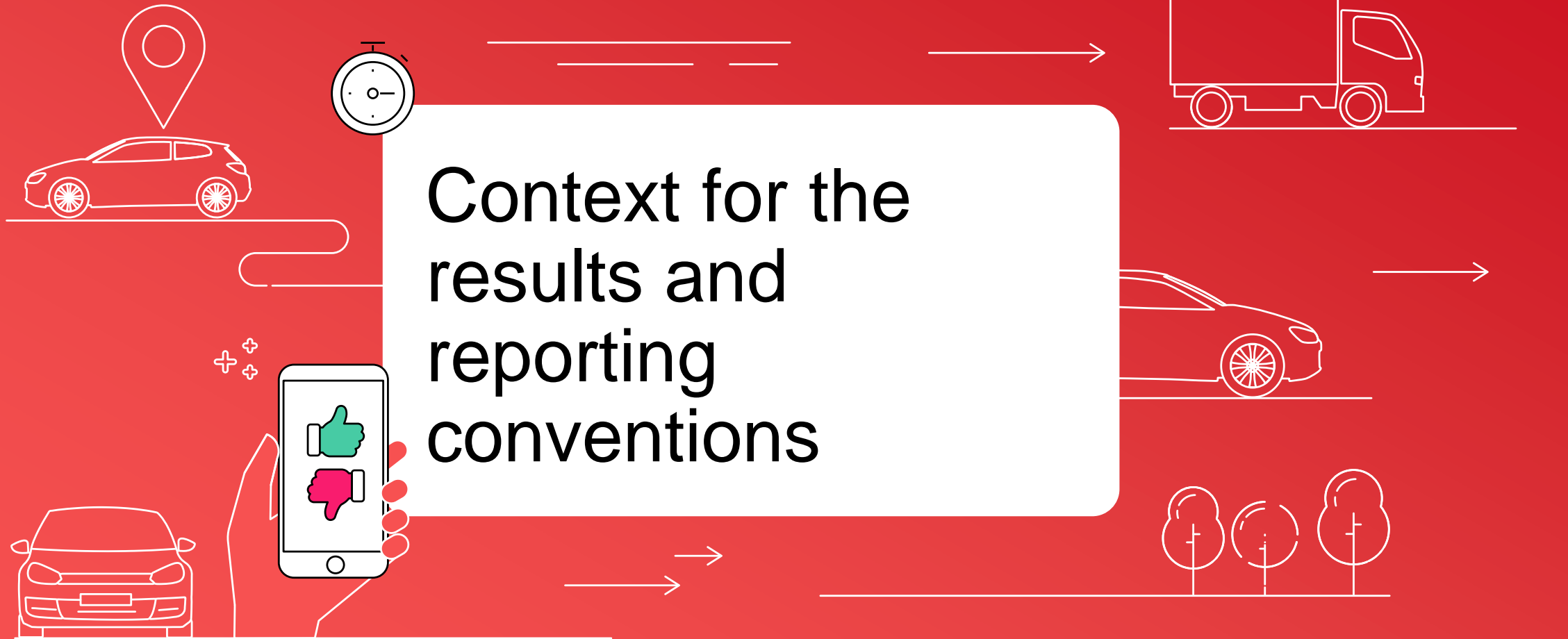
Despite some vocal complaints, in practice signage is rated similarly to other motorways



Lighting after dark rated better than other motorways, for these more recently upgraded roads

While relatively few drivers (on any road) rate delay management well, smart motorway users are less dissatisfied with information provision. They are typically a little better informed about delays, both in advance and during their journey, with online maps and electronic signage important in this.

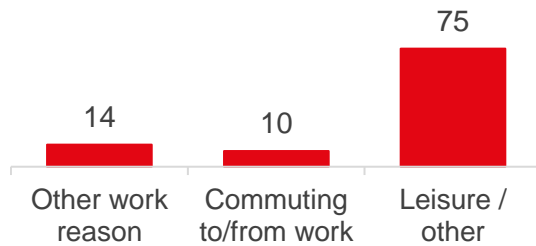
Context for the results and reporting conventions



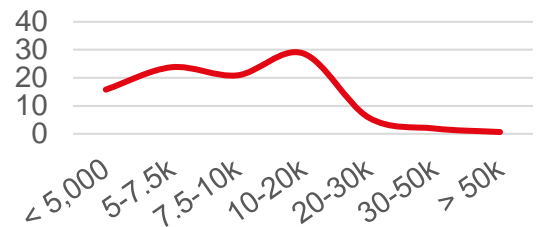
Users, and how they use the SRN in the South West

Driving context

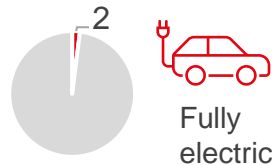
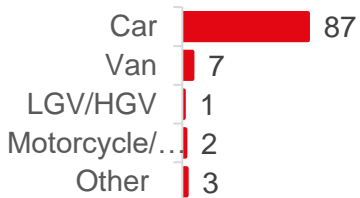
Journey purpose



Annual mileage (total)

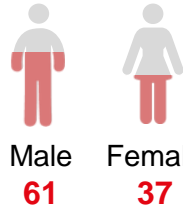


Vehicle type

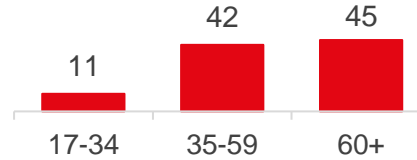


The traveller(s)

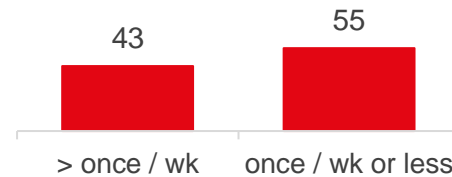
Gender



Age



Frequency on SRN



Any disability

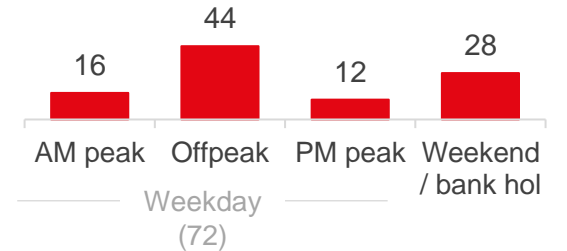


Travelling party



Environment

Journey time



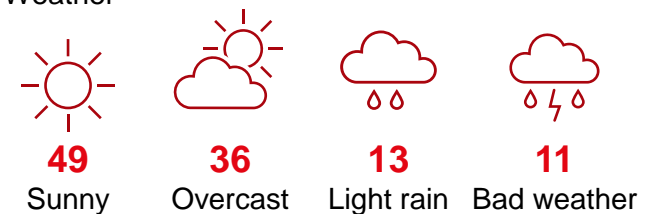
15% journeys took place (partly) after dark

15% journeys took place (partly) after dark

58% took place on major A roads

took place on major A roads
(among the regions with highest A road proportion)

Weather



Figures shown are for the South West; patterns are very similar at all-regions level with the exception of age, where the proportion of **older travellers** on the SRN here is marginally higher, **frequency** which is very slightly lower for travellers in the South West, and the proportion of **journeys made on major A roads** which is higher than average here.

Base: all SRN users surveyed, South West, Oct '21 – Sep '22 (918)

Some principles in the reporting



Time periods for reporting

Throughout this report, the majority of results show the feedback for journeys which took place between October 2021 to September 2022.

This time period differs in some isolated places, either where a question was not included on the survey for all of this time, or where a longer period has been included in order to increase the sample size for reporting. These instances are marked on the relevant pages.

National and regional-level data

Some pages in this report show data at national (England) level, summarising a particular topic where the findings are relevant to all regions.

Findings on this page are at national level



These pages are indicated with this symbol.

In other cases, results are at regional level.



Satisfaction and other ratings

Where figures are shown for “good”, “poor”, “satisfied” ratings, etc., this is the percentage of users who gave an opinion. I.e. this excludes people for whom it was not relevant at all, and those who answered “don’t know”.










“Traffic lights”

Some pages in this report use “traffic lights” to summarise how well or poorly journeys on the SRN are rated among a particular group of users, on a particular topic, compared to average.

In some cases this gives an overview of the topic from across several specific measures within a theme, together with qualitative feedback from users on the same themes, in response to open-ended questions. (e.g. “Road condition” covers surface, lighting, markings, cats eyes, litter).

Colours used in these traffic lights therefore take an overview perspective, and constitute a judgement as informed by the survey data. Colours used can be interpreted as follows:

-  Well above average across all relevant measures (and this finding may be supported by notable positive qualitative feedback)
-  Above average across most relevant measures (and may be supported by some positive qualitative feedback)
-  A little above average across some relevant measures (but not all)
-  Largely in line with average (this includes where sample sizes are too small to be confident that the result is genuinely different from average)
-  A little below average across some relevant measures (but not all)
-  Below average across most relevant measures (and may be supported by some negative qualitative feedback)
-  Well below average across all relevant measures (and may be supported by notable negative qualitative feedback)

Contact

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Passengers' Council