



# Logistics and Coach Survey: Strategic Roads

2022–23

# Foreword

**W**hen most of us think about users of England's motorways and major 'A' roads we tend to think about the driver behind the wheel. But businesses are also major users of the strategic road network (SRN), the roads managed by National Highways on behalf of the government. Not least, those businesses directly operating lorries and coaches on the SRN.

Whether it be transporting containers to and from our seaports or allowing shelves to be stocked in our supermarkets, the logistics sector is heavily reliant on National Highways' roads. As are coach companies, whether they are taking people to Wembley because of a rail strike or meeting growing demand for scheduled coach services.

So as well as our Strategic Roads User Survey (SRUS), which measures driver satisfaction

with journeys on the SRN, Transport Focus carries out this survey to understand the views of businesses, not their driving staff – who run lorries and coaches on National Highways' roads. The survey is referred to in the Government's Road Investment Strategy for 2020-25 and we look forward to it being confirmed as an official performance indicator from 1 April 2024.

The survey shows that in 2022/23 around half of lorry and coach businesses were satisfied that the SRN is meeting their business needs, unchanged on the previous year. These results suggest that National Highways need to re-energise its approach to meeting the needs of these key customers. In the year ahead we will be pressing them to do just that.

**Anthony Smith**  
Chief executive



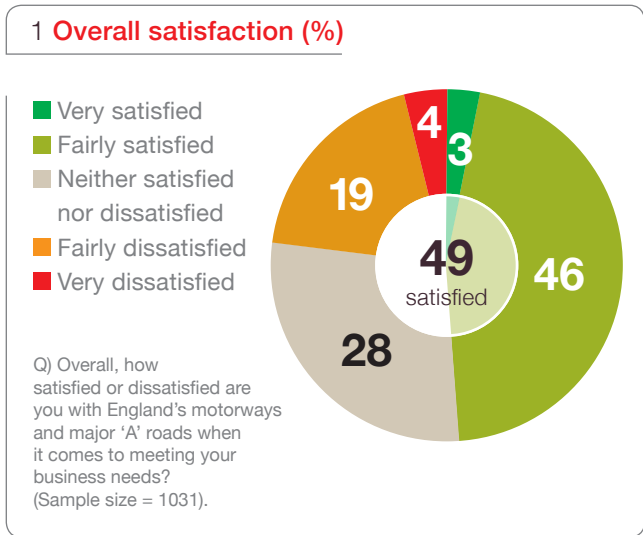
# Results

## Overall satisfaction

We asked logistics and coach businesses how satisfied or dissatisfied they are with England's motorways and major 'A' roads when it came to meeting their business needs. Just under half (49 per cent) were satisfied overall, while around one in four were dissatisfied overall (23 per cent).

Overall satisfaction for the freight sector was also 49 per cent. Among those using articulated lorries (made up of two separate sections – a driving cab and a trailer) satisfaction was 51 per cent. Among those using rigid lorries (those without a separate driving cab) satisfaction was 48 per cent. Overall 46 per cent of the coach sector were satisfied.

Over the three years of this survey during Road Period 2, overall satisfaction has declined from 55 per cent in 2020-21 to 46 per cent in 2021-22 and then since risen to 49 per cent in 2022-23.



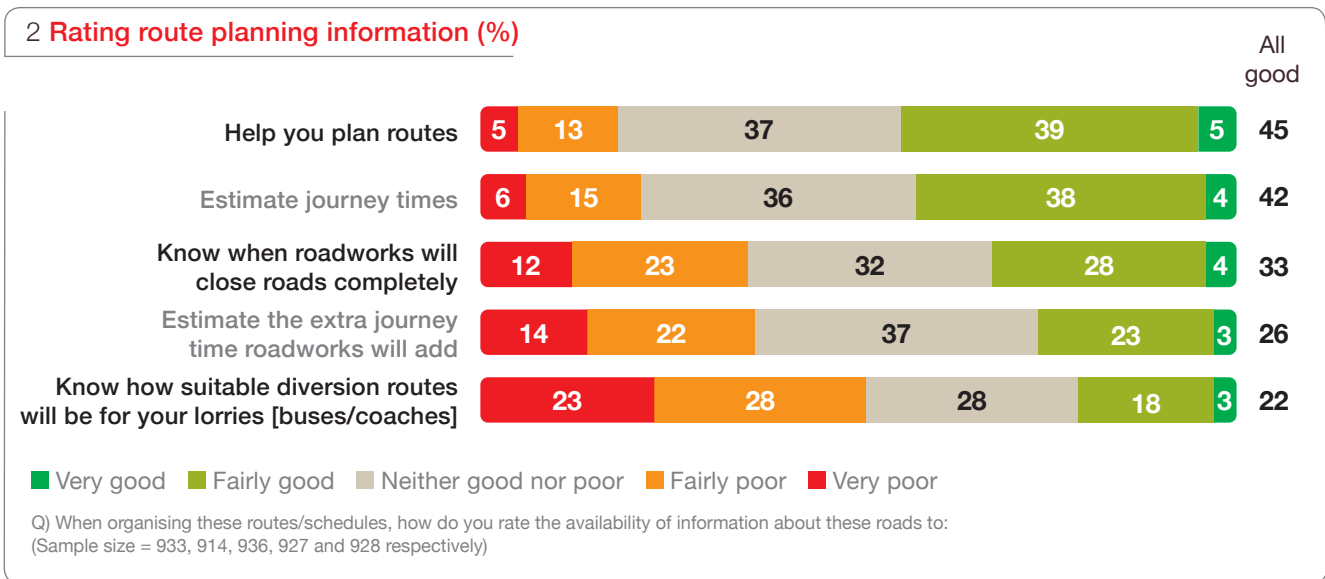
## Planning routes

In the survey the majority of vehicle managers (87 per cent) say they are involved in route planning.

Their highest good rating on any aspect of information available was 45 per cent. Only around a quarter say the information to estimate extra journey time due to roadworks and information about how suitable diversion routes are for their vehicles was good (26 and 22 per cent respectively).

*“Better real time traffic notifications. Route planner (including low bridge info) managed by National Highways and available to all.”*

Freight



Around three quarters of vehicle managers are involved in route planning on the day or within a few days of their vehicles' journeys. On around half of these journeys the arrival time window is 30 minutes or less and just over half say their vehicles' journeys on the strategic road network are for more than five hours.

Just under two thirds use internal planning systems as part of their methods to plan their routes (question only asked of freight managers).

*"Haulage companies needs should be taken more into account when deciding when is best to close major routes."*

Freight

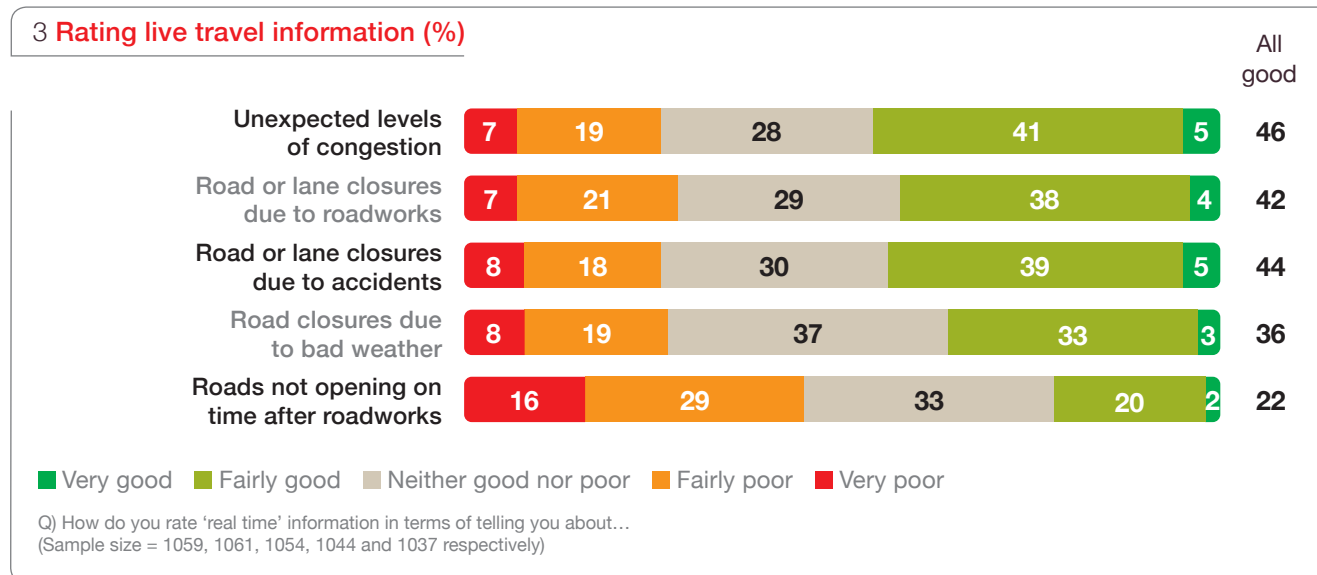
## On the day information

Most measures on the availability of live travel information were higher rated than those for advance planning information. Even so, less than half rated these measures as good. Information about overrunning roadworks is particularly low, with only 22 per cent rating it good.

*"Road closures due to roadworks. Need a reliable information source. Finding out on the night is unacceptable. Pre-planning is essential."*

Coach

### 3 Rating live travel information (%)



## Responding to incidents and accidents

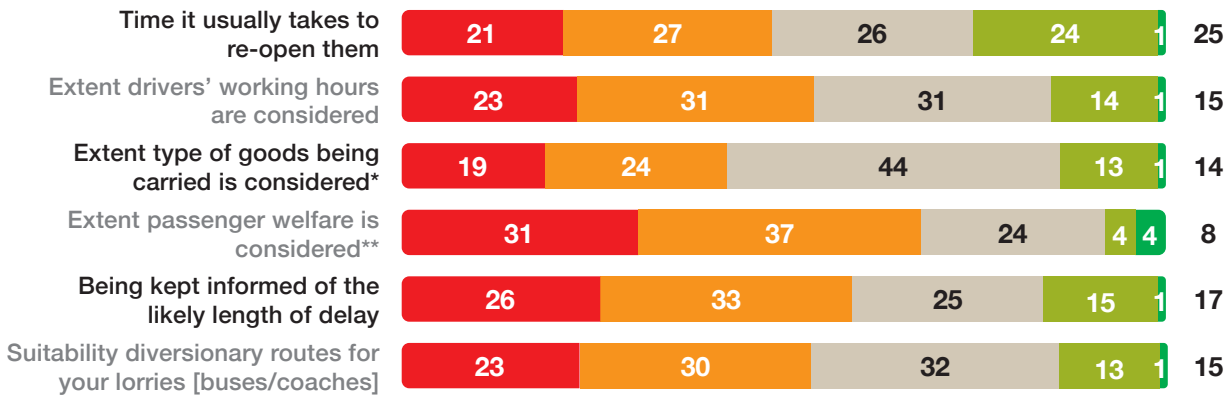
The ratings for responding to incidents and accidents are low on all aspects; the best rating being a quarter saying good. Notable, are the particularly low ratings for considering 'driver hours', 'goods carried', 'passenger welfare (coach firms)' and being kept informed of likely length of delays. Looking at comments by vehicle managers there is a consistent feeling that a disproportionate amount of time is taken to clear minor incidents.

*"Accidents dealt with quicker or like Germany, push them to one side, deal with it through the night."*

Freight

#### 4 Rating incident/accident handling (%)

All good



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... (Sample size = 1057, 1035, 899, 93, 1046, and 1035 respectively).  
\* asked of freight only; \*\* asked of coach only.

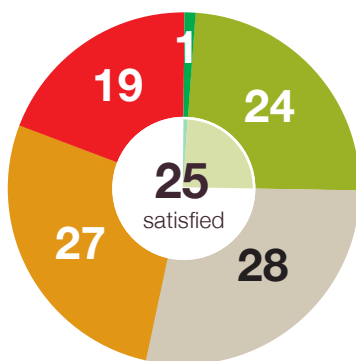
## Road surface

A quarter of vehicle managers rated 'road surfaces not impacting vehicles' as good, with just under a half rating this poor.

Around a third of freight managers rated road surfaces 'not damaging goods' as good and a quarter of coach managers rated surface quality as good for 'not impacting passenger comfort'.

#### 5a Road surface – wear and tear (%)

Very satisfied  
Fairly satisfied  
Neither satisfied nor dissatisfied  
Fairly dissatisfied  
Very dissatisfied



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? (Sample size= 1052).

*"Hole repairs are extremely poor. Fixing the large holes only and leaving the small ones next to it which means they will have to come back and shut the road again to fix them when they are larger. A total waste of money."*

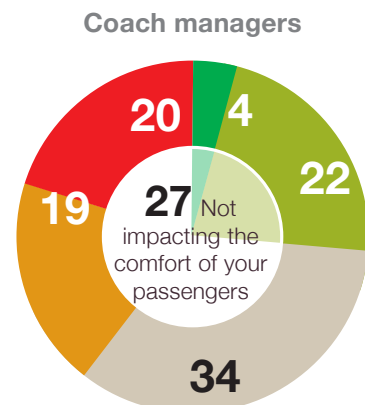
Freight

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

Very satisfied  
Fairly satisfied  
Neither satisfied nor dissatisfied  
Fairly dissatisfied  
Very dissatisfied



Q) How do you rate the surfaces of these roads in terms of: not damaging goods? (Sample size = 933).



Q) How do you rate the surfaces of these roads in terms of: not making passengers uncomfortable? (Sample size = 94).

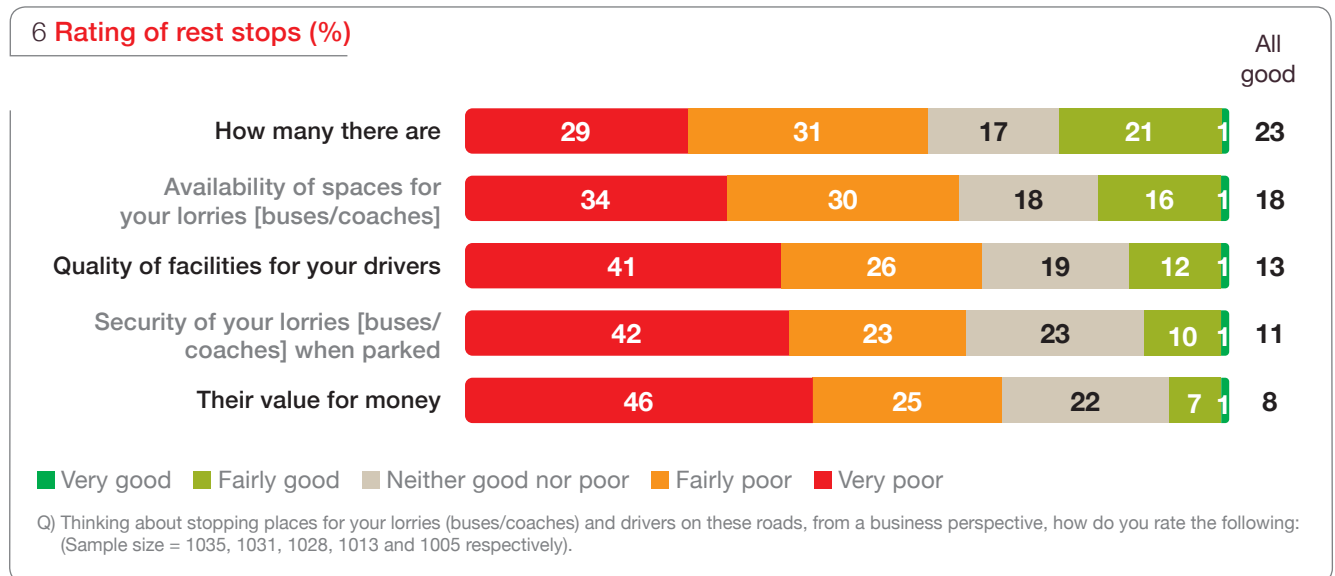
## Rest stops

Vehicle managers frequently mentioned rest stop facilities and vehicle security, especially where they have paid for vehicles to park. Vehicle security was rated good by 11 per cent and driver facilities good by 13 per cent. The highest rated measure was the number of rest stops, with just under a quarter (23 per cent) rating this good and lowest rated was value for money of rest stops with less than one in ten saying this was good (8 per cent).

*“Motorway services are very expensive. Drivers for trucks may spend 20 minutes getting from the vehicle to shops, toilets and back to vehicle in a 45 minute break. Poor showers. At night curtains on trucks always getting cut.”*

Freight

### 6 Rating of rest stops (%)



## View of how National Highways manages these roads

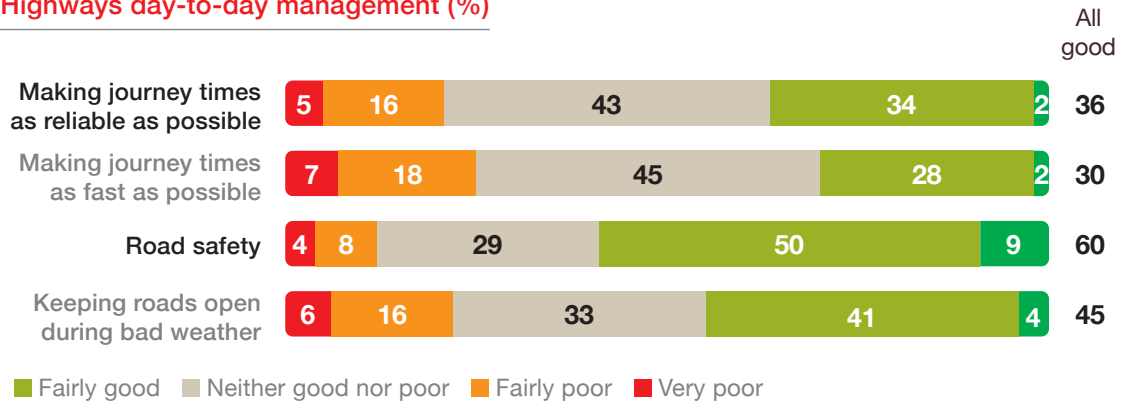
On the day-to-day management of National Highways' roads, safety scored highest with 60 per cent rating it good. On keeping roads open in bad weather, 45 per cent rated it good. Around a third of vehicle managers rated as good both the 'efforts being made to make journey times reliable (36 per cent) and 'journey times as fast as possible' (30 per cent).

*“Reduce the length of some of the roadworks particularly on major arterial routes and motorways for example, M1, M6. Motorway roadworks for twelve miles. Do the roadworks in smaller bites.”*

Freight



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

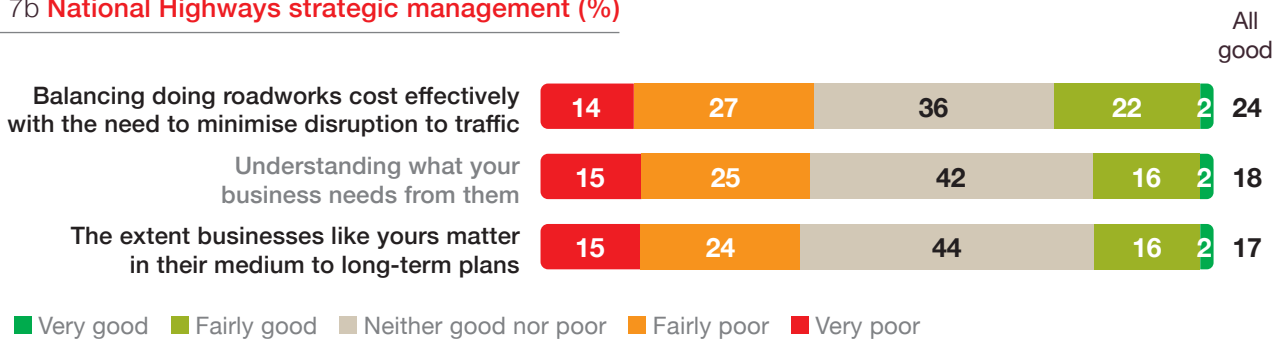


Q) From a business standpoint, how do you rate National Highways' management of these roads in terms of: (Sample size = 1030, 1026, 1032 and 1026).

However, looking at the more 'strategic' aspects of network management, ratings of 'good' are lower and 'poor' are higher. Less than one in five rated as good 'that their needs are understood' or that 'they matter much in the medium to long-term planning for these roads.

We asked freight and coach vehicle managers about their awareness of National Highways' role. Almost three in five said they had at least a fair understanding (56 per cent) and just over one third (37 per cent) said a basic understanding. Very few (seven per cent) said they knew little or nothing about National Highways' role.

### 7b National Highways strategic management (%)



Q) How do you rate National Highways in respect of: (Sample size = 1025, 1011, and 1000 respectively).

*"More co-ordinated approach to roadworks and road closures. More pressure on contractors to complete repairs and improvements on time. More overnight working. A better network of exclusive HGV parking areas."*

Freight

*"One national website with up-to-date information of all roadworks, disruptions etc so a driver or manager can plan a journey better."*

Freight

## What drives overall satisfaction

The extent to which each of these areas influences overall satisfaction is shown in the chart below. The top three areas are: how National Highways manages the network; followed by road surfaces and then route planning information.

Within National Highways' management of the network, the top two measures impacting satisfaction are journey speed and journey time reliability.

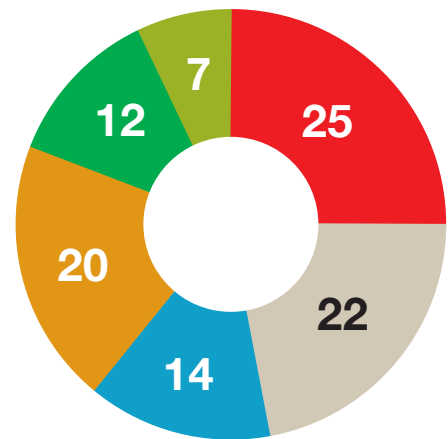
*“More secure parking and toilets available. Quite often there is nowhere for a driver to use a toilet (countries like Belgium and Germany have truck stop laybys every few kilometres and are better lit and have toilets.”*

Freight

*“That they are out of touch with the welfare of the professional road user.”*

Freight

### 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  $R^2 = 0.34$ .

## What needs to improve

We asked vehicle managers what they would like to see improved. The following were mentioned most frequently:

- The way roadworks are carried out. Comments covered four aspects:
  - Do small stretches more intensively, almost 24/7, and only when complete, move onto the next stretch. Vehicle managers' view is that stretches are longer than necessary and worked on without urgency.
  - Provide as much notice as possible. Vehicle managers feel they are told late, when they believe works must be planned some way in advance.
  - Make sure diversion routes are suitable for HGVs, with rest stops, low bridges and driving hours taken into account.
- Make all the information about planned roadworks available to vehicle managers and all in one place, including detail about diversion routes. And have a means for vehicle managers to discuss aspects of the works with National Highways.
- Clear incidents more quickly. There is a perception they are cleared more quickly elsewhere in Europe.
- Rest stops are frequently mentioned: there not being enough of them, particularly off the motorway network

*“Clearance of minor incidents seem to take too much time.”*

Freight



## 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 'what to improve' themes, but the following stood out:

- Be aware that a lot of freight traffic is overnight.
- The need simply to communicate better, more comprehensively and meet the particular information needs of the freight and coach sectors.
- Dislike of smart motorways. Even though lorries are the big vehicles on the road, freight firms often mention that they want hard shoulders reinstated.
- Demonstrate greater urgency about completing roadworks and clearing accidents. Though raised under 'what to improve', it was also raised here in a cultural context about National Highways and their contractors.
- Some thought the chief executive was doing an okay job 'under the circumstances', that the job was difficult because of the constraints needed to work in.
- Road surfaces are in poor condition and that matters for heavy goods vehicles. Goods that get damaged cost a lot and they feel this should not be a business expense they have to incur.

*"Complete roadworks faster. Why do we see lanes closed for weeks with no work being carried out such as the Ouse Bridge eastbound M62."*

Freight

*"Our drivers need to take breaks out on road and availability of stopping areas is poor. This means time is lost and stress is caused by the lack of laybys etc. which impacts their wellbeing. No wonder there's a driver shortage."*

Freight

## How we did it

Those responsible for operating vehicles over 3.5 tonnes ('vehicle managers') must be licensed by their 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 from all three survey waves during the 2022-23 year. The overall number of responses was 1091. Of this, 993 responses are from freight and 93 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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