



Strategic Roads User Survey

Headline findings: August 2022 – July 2023

December 2023

Introduction



Strategic Roads User Survey

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.

Through the Strategic Roads User Survey (SRUS), Transport Focus gathers journey experience feedback from a representative sample of SRN users.

SRUS is also used by the Office of Rail and Road to monitor National Highways' performance.



Results in this report cover 12 months:
August 2022 – July 2023



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.



9,091 responses received in total over this period
c. 1,500 on average per region

Headlines: August 2022 – July 2023

71% of Strategic Road Network journeys are satisfactory



Overall satisfaction is lower on average through Q1 and Q2 2023 (71%), than 2022 as a whole (74%)

Rating of journey factors also down vs 2022, especially journey times and road surfaces



Key factors for satisfaction are that journeys are free-flowing, and unhindered by congestion, roadworks and other delays



Congestion in particular drives dissatisfaction, along with roadworks presence and perceived poor management of roadworks, poor road condition and presentation (lighting, litter, marking), and other issues

While less common than roadworks, unplanned delays are more impactful and felt to be less well managed



Poor road condition and presentation can cause both discomfort and perceived risk

Road surfaces are the salient issue, but lighting and litter also in need of attention



Smart motorway journeys often less positive than others

Perceived as less safe, and slow in practice (though roadworks management and road condition on smart motorways is rated in line with average)



The issues and priorities are similar across the Network

Though there are some further regional nuances

And a wide variety of experience on individual roads

Differences by region



Roadworks a particularly strong dissatisfaction factor

Felt to be **excessive** in scope, duration and impact, especially but not limited to the M1

Major A roads in East Anglia (Area 6) driving overall drop in satisfaction, especially around:

- Road presentation
- Information provision
- Congestion: impactful when it occurs with less capacity and ability to manage and mitigate it



Lower journey satisfaction than other regions

Congestion the major factor, reportedly affecting a third of journeys

Roadworks: a poorer experience overall on roads managed by **Connect Plus**

Other key issues:

- Road markings, permanent signs and experience of junctions on major A roads
- Temporary speed restrictions on motorways



Reportedly **high levels of disruption on motorways in the West Midlands**

Temporary (and variable) speed limits particularly begrudged here, and, along with other smart measures are perceived to cause and/or exacerbate the impact of disruption

Road surface quality, litter and overall presentation of roads rated poorly, especially on key West Midlands motorways, and some East Midlands major A roads



Below average in 2022, but **bucking recent national trend, with improved satisfaction in 2023** linked to perceived reduction in roadworks and congestion

Nevertheless:

- **Congestion still perceived high in Cheshire and Merseyside**
- **Roadworks in Lancashire and Cumbria**

Lighting and cats eyes rated poorly, exacerbating roadworks experience



Trends in road users' satisfaction in the South East are similar to patterns at national level (with less regional variation from the national picture than other regions)

Broadly, **roads in Kent, Sussex, Surrey are performing less well** than in Oxfordshire, Berkshire, Hampshire, especially in terms of

- Information provision around roadworks
- Road surfaces, lighting, cats eyes



Outperforming other regions (though following national trend for lower satisfaction in the last year)

Key issues affecting motorists in the South West:

- **Congestion in Somerset, Dorset, Devon**
- **Roadworks in Devon & Cornwall**
- Managing the challenge of **narrow lanes and single carriageway roads and slower vehicles**

Poor lighting in places



Roadworks felt to be frequent, and a particularly strong dissatisfaction factor

Especially in the **North East, and on the A1**

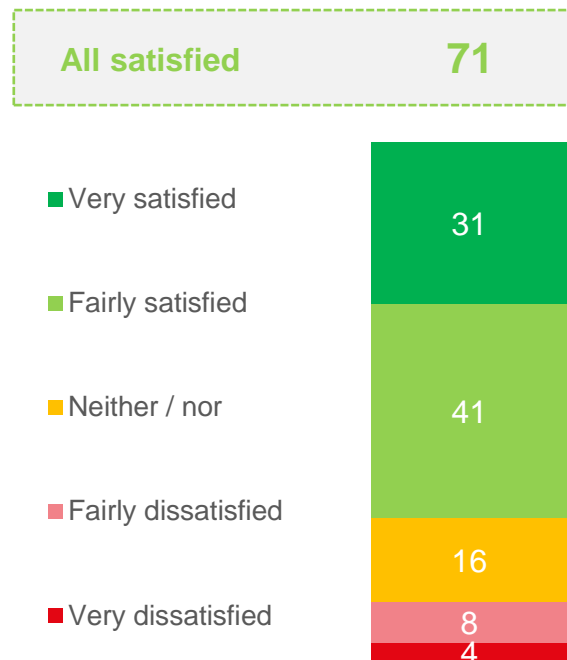
Particular frustration with ongoing nature of works, and resulting (variable) speed restrictions

Congestion also an issue for motorists using **major A roads**

Road condition rated better than elsewhere, but perceptions have deteriorated, as nationally

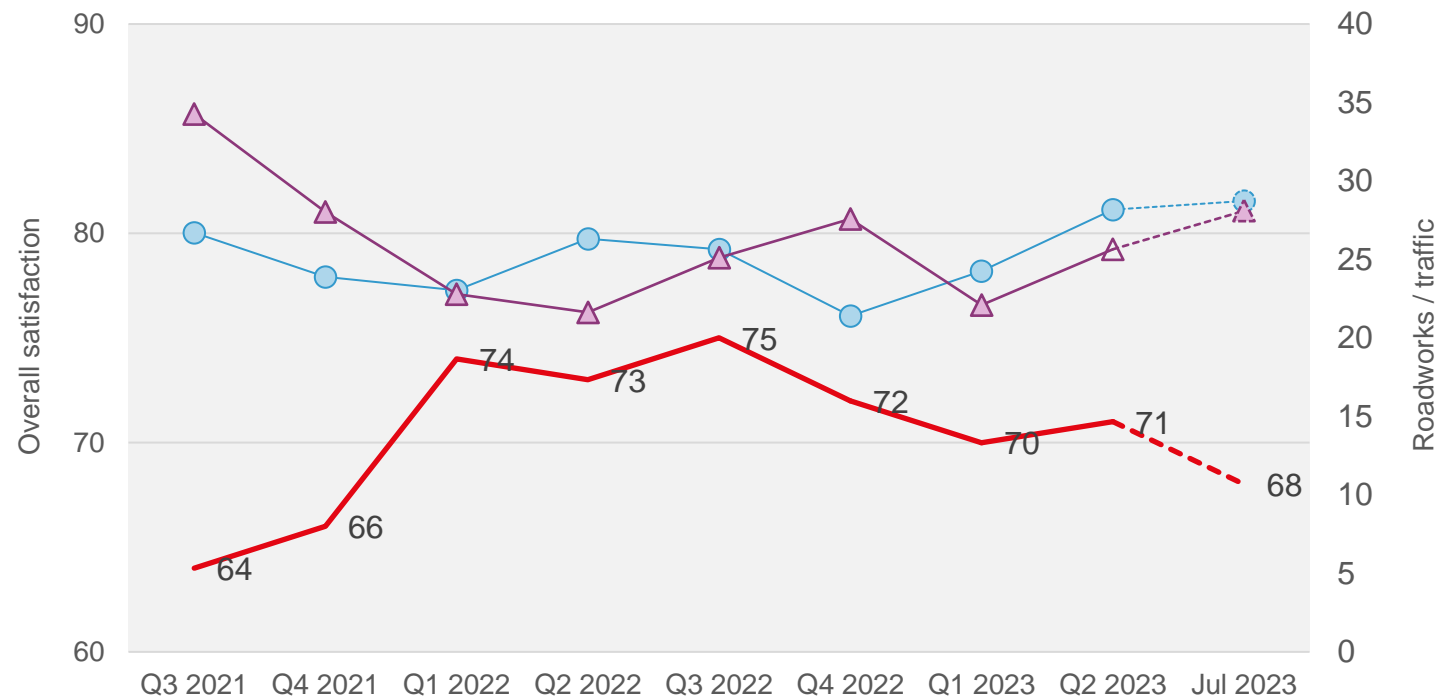
Almost three quarters of SRN journeys are satisfactory; the average through 2023 so far is lower than that for 2022 as a whole

Overall satisfaction
Aug '22 – Jul '23, all regions



Base: all SRN users surveyed, Aug '22 – Jul '23
All regions (9,055)

Overall satisfaction vs. perceived roadworks and level of traffic, over last two years
% very/fairly, quarterly, all regions

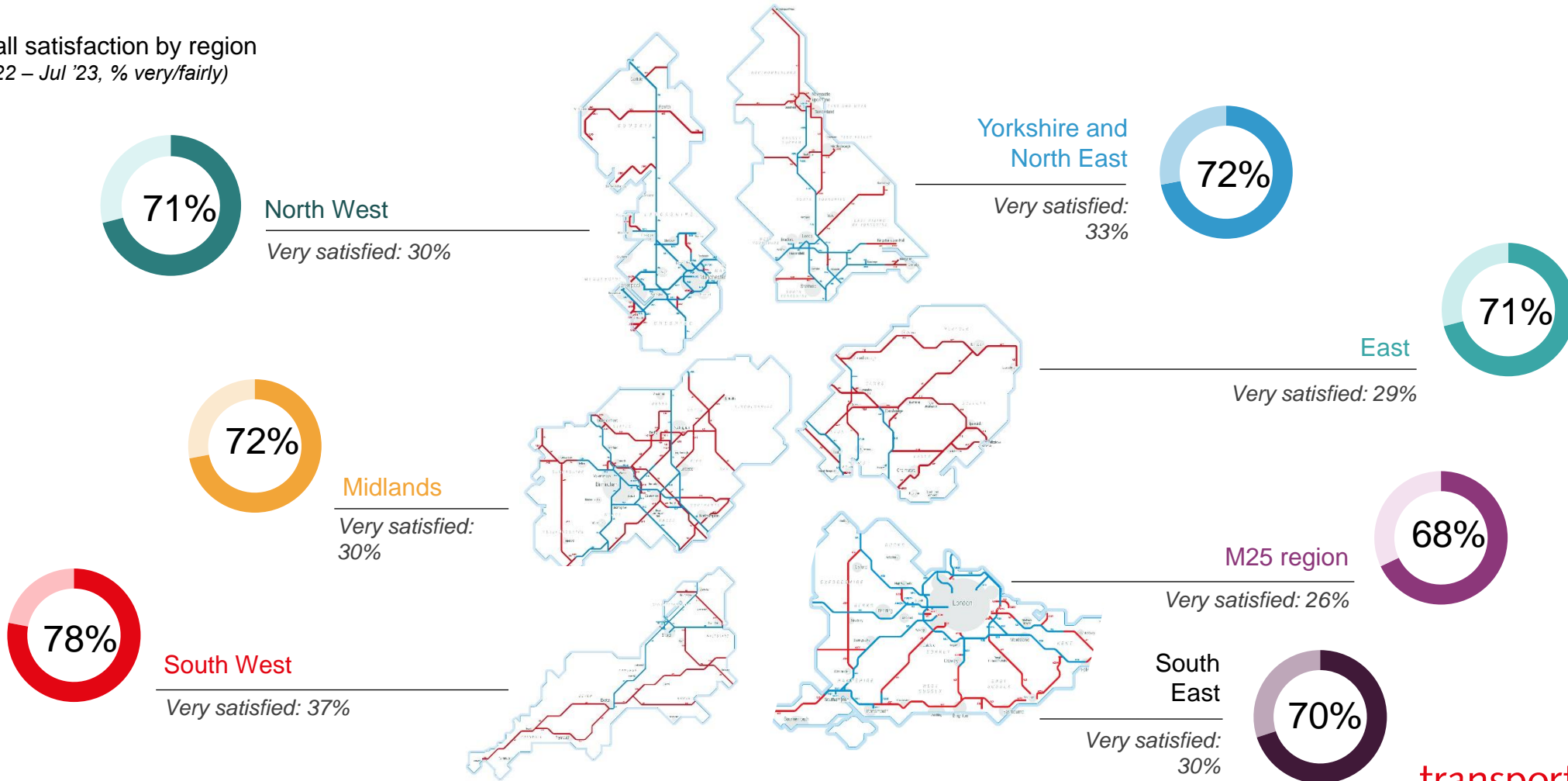


— Overall satisfaction
● Passed through roadworks
▲ Heavy / congested traffic

Base: all SRN users surveyed, Jul '21 – Jul '23
All regions: (average 1928 per quarter; 779 in Jul '23)

Most regions performing similarly across this period as a whole, South West leads and M25 region is lowest

Overall satisfaction by region
(Aug '22 – Jul '23, % very/fairly)



Base: all SRN users surveyed, Aug '22 – Jul '23 (9,055)
South West (1,033), Yorkshire and NE (1,442), Midlands (1,985), North West (1,382), East (1,299), South East (1,712), M25 region (1,355)

There is very wide variety in overall journey satisfaction, for different roads

Overall satisfaction | Aug '22 – Jul '23, % very/fairly



Best rated

M23 85

M18 84

A19 81

M40 80

Typical features:

- ✓ Straightforward, efficient, safe journeys with free-flowing traffic
- ✓ Usually aided by light traffic and relative absence of roadworks
- ✓ Some road users acknowledge and appreciate recent improvement works
- ✓ Not without some down-sides, for example:
 - Negative perceptions of smart motorways generally, sometimes influencing experience even where it is otherwise largely positive
 - Congestion hot spots
 - Presence of litter



Poorest rated

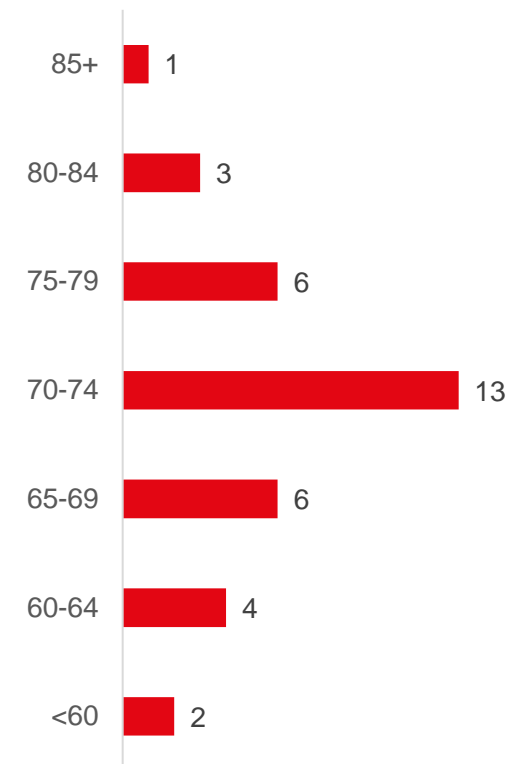
A12 57

M42 56

Typical features:

- × Particularly high perceived congestion/roadworks, compromising journey times
- × Road condition often perceived as poor
- × Smart motorway features often perceived to be exacerbating or creating problems and risks to safety, rather than alleviating them

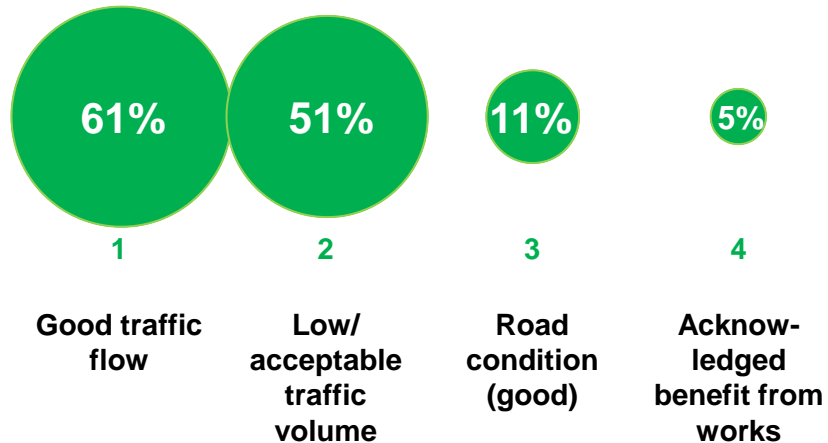
Overall satisfaction: ratings distribution
Aug '22 – Jul '23
Number of roads within each rating band



Base: all SRN users surveyed, Aug '22 – Jul '23, where sample size is at least 75

Free-flowing journeys and light traffic drive satisfaction, and the absence of disruptions, makes for fully satisfactory rather than simply 'ok' journeys

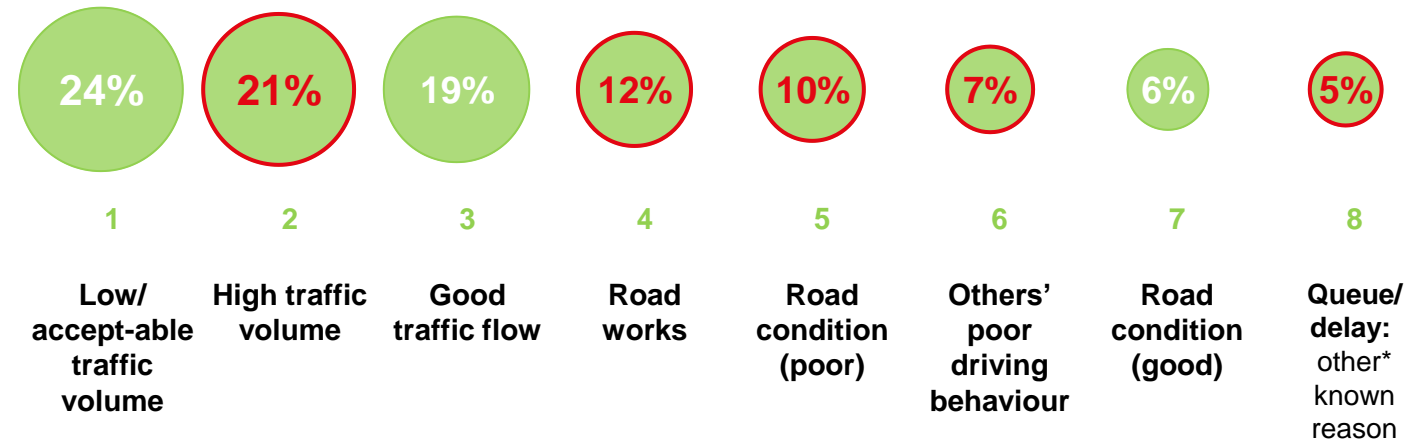
Very satisfied: top reasons
% mentioning topic



Plus:

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

Fairly satisfied: top reasons
% mentioning topic



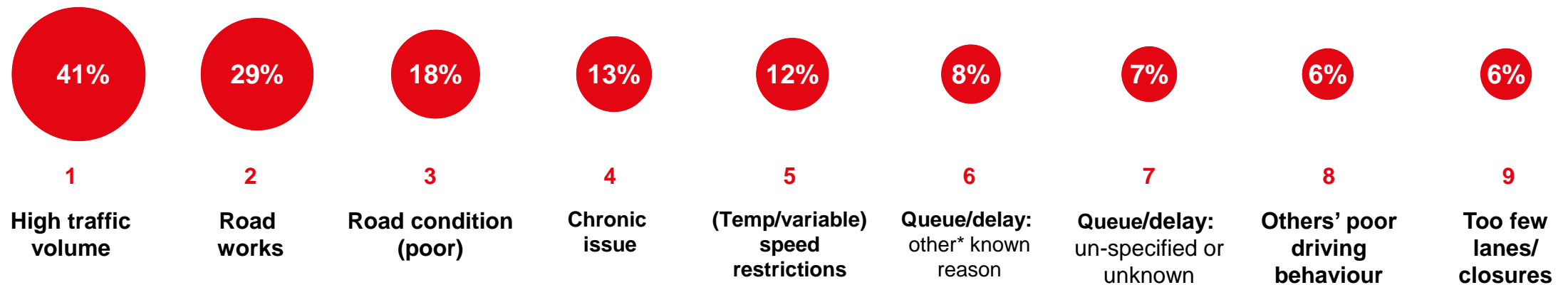
Plus a **range of other factors relating to poor management and features** of roads

Those who are “fairly satisfied” with SRN journeys often still experience some issues. So while 71% of users are satisfied overall, could National Highways aim to increase the proportion who are very satisfied (currently around a third)?

Perception of heavy traffic, followed by roadworks, are the most common reasons for dissatisfaction, along with poor road upkeep, variable speed restrictions – and many are frustrated with ongoing nature of these issues

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) % mentioning topic



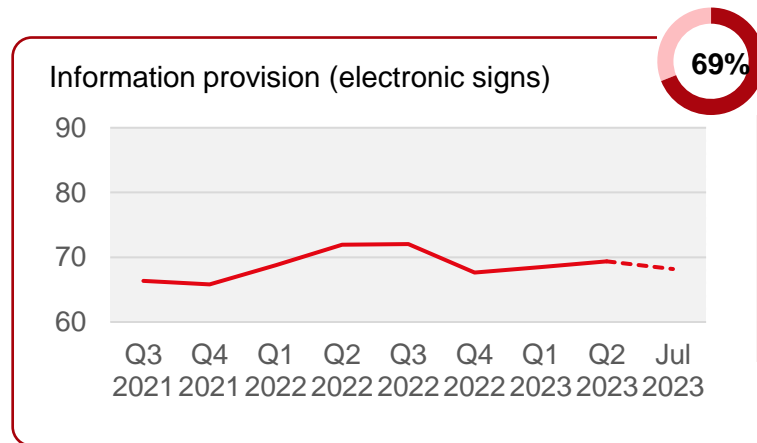
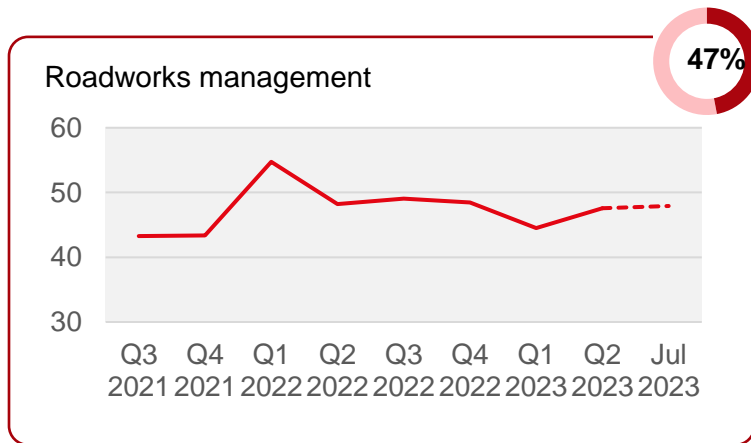
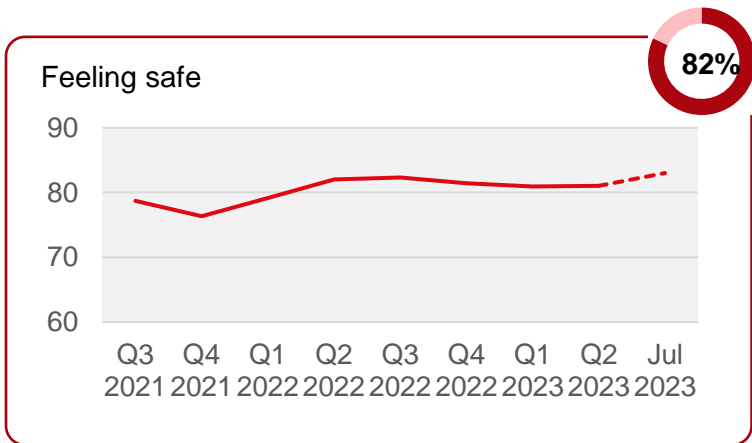
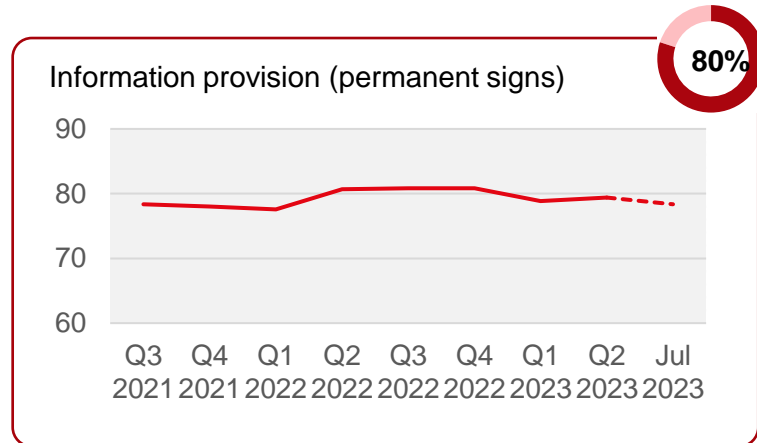
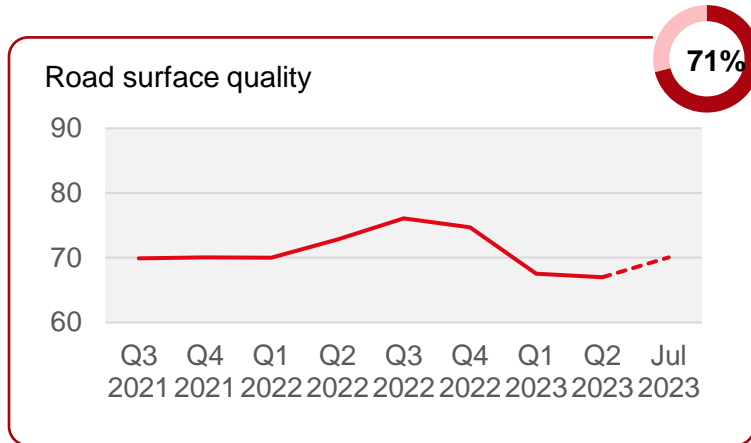
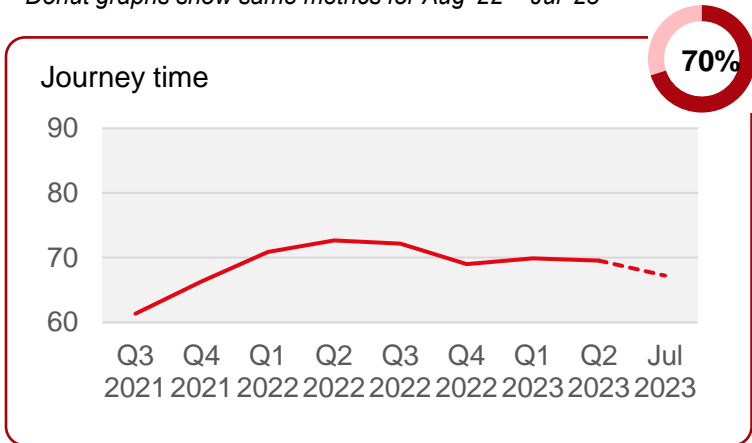
Plus other concerns and frustrations including safety, poor, absent or misleading signage, concerns around changing lanes, merging or joining/leaving roads, and comments relating to dislike of smart motorways

Base: random sample of those giving a rationale for overall satisfaction rating Aug 22-Jul 23 – dissatisfied, all regions (303)

* 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

2022's highs, dropping a little in late 2022 and 2023, are reflected across all key measures, most notably for satisfaction with **journey times** and **road surfaces**

Key metrics over last two years (% very/fairly, quarterly)
 Donut graphs show same metrics for Aug '22 – Jul '23

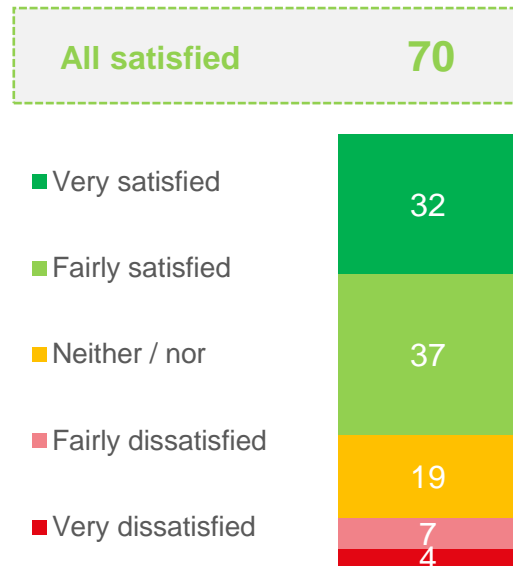


— All regions

Base: all SRN users surveyed, Jul '21 – Jul '23 (average 448-1,926 per quarter; 209-782 in Jul '23)

Journey time is influenced by **congestion, roadworks and other delays**; their **handling is rated poorly**, and while less frequent, **unplanned delays in particular spoil journeys**

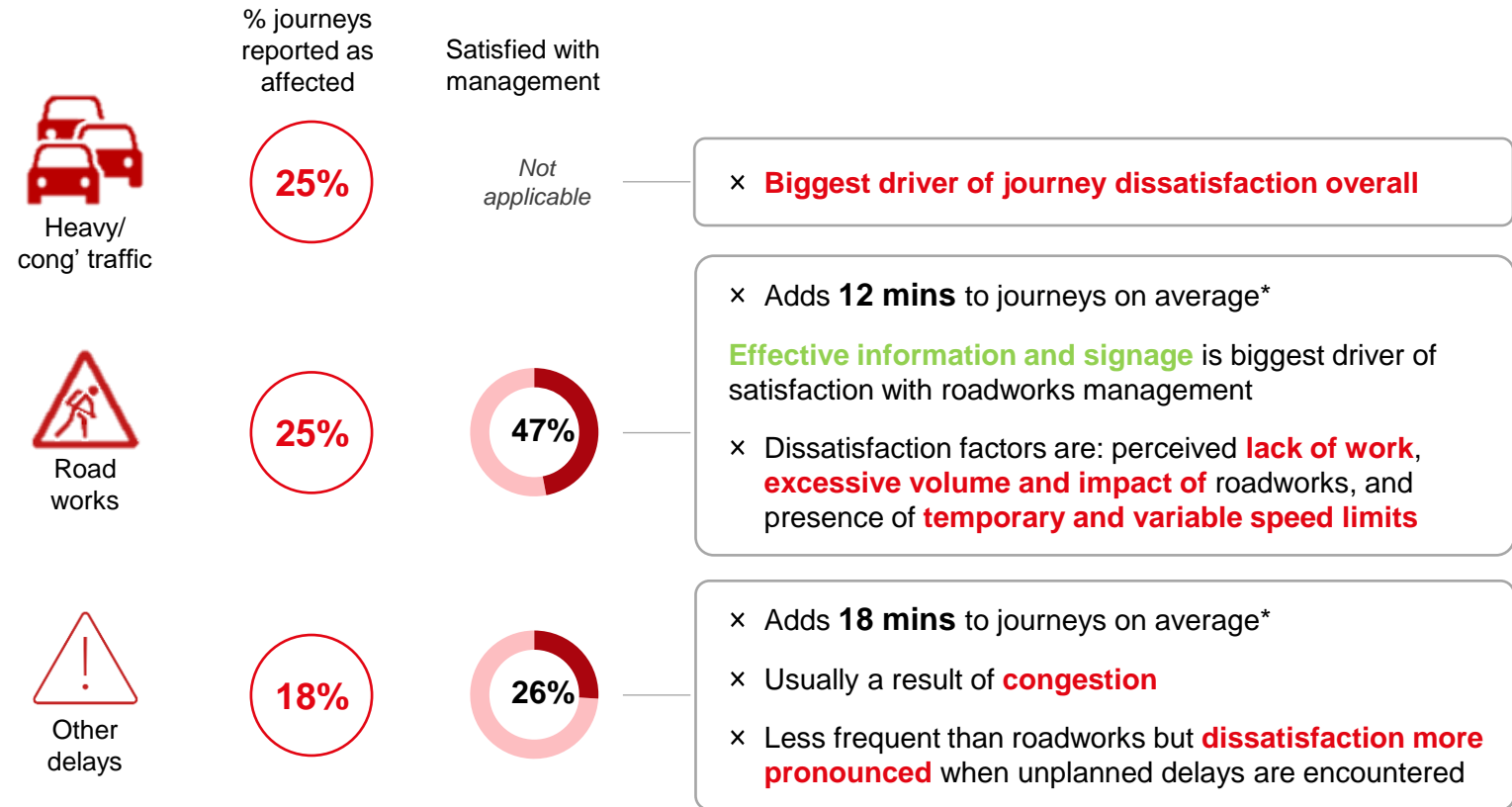
Journey time satisfaction
Aug '22 – Jul '23, all regions



20%

A fifth of journeys are reported to take longer than expected


Key journey disruption factors influencing journey times



Base: all SRN users surveyed, Aug '22 – Jul '23
All regions (9,056 / 8,530)

*Mean score calculated from reported additional time reported by those affected
Base: all SRN users surveyed, Aug '22 – Jul '23, all regions (9,091)
All affected by roadworks (1,985), all affected by other delays (1,416)

Poor road condition and presentation can cause both discomfort and perceived risk; **road surfaces the salient issue**, but **neither are lighting nor litter rated well**


 Road condition/presentation is the **4th biggest factor** for dissatisfaction

Motorists' unprompted comments focus on **potholes** and **rough surfaces**, among other issues with road condition and presentation

This can make for **noisy, uncomfortable, dangerous driving**

The inside ...is very uneven and small potholes are appearing. So most people ...seem to not use the lane

Potholes in road, having to swerve to miss them

 Perceptions of road surface quality have deteriorated since 2022, to lowest levels in the last two years

Rating of road condition (% very/fairly satisfied, all regions)



Road surface

71



Road markings

79



Road and verge free from litter

63



Road lighting

66



Cats' eyes

70



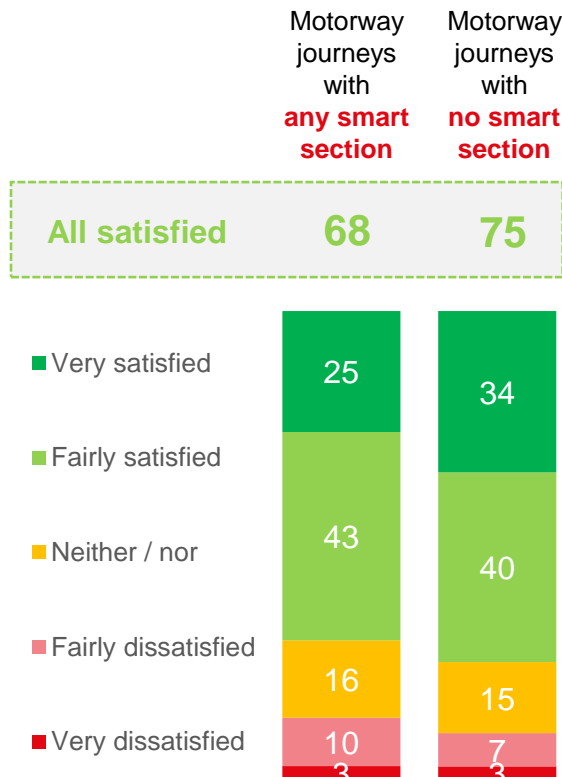
- × Vehicle debris (like tyres), consumer waste (for example, food packaging) and roadworks left-overs all contribute to perceptions of litter
- × Most drivers calling out debris in their own-words feedback were fairly rather than very satisfied or dissatisfied with their journey overall. **It's not a deal breaker, but it's unsightly and:**
- × Can **imply broader lack of care** or accountability
- × Some fear or see **tangible effect for example. accidents**

- × At the very least, poor lighting creates **uneasiness**
- × Commonest complaint is **insufficient lighting**, but motorists' comments also highlight that:
- × Poor lighting has particular **impact in roadworks** (including being too bright), or **poor weather**
- × Lighting often felt to be important – and noticed as poor – when combined with other poor maintenance, for example, **exacerbating poor signage or road marking**

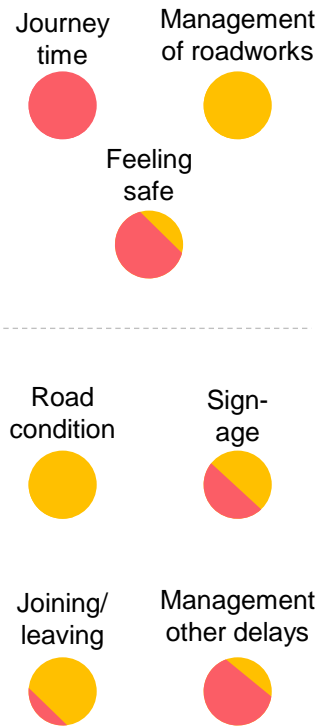
Base: Road surface / marking / litter, Aug '22 – Jul '23, all regions (7,694-8,967)
Lighting / cats eyes, among those travelling after dark, Aug '22 – Jul '23, all regions (1,542-1,699)

Smart motorway journeys often less positive, **perceived as less safe** and **slow in practice** (though roadworks management and road condition rated in line with average)

Overall journey satisfaction
Aug '22 – Jul '23, all regions



Other key metrics: smart vs non-smart comparison
Aug '22 – Jul '23, all regions



Comparatively poorer journey times on smart motorways is driven by a **perception of heavy traffic**, typically commented on more often for these roads than others.



Although smart measures are often introduced to mitigate pre-existing congestion problems, **temporary speeds are a common cause for complaint in their own right**, and many perceive that they exacerbate the problem, feeling that they **change too often**, are **not removed quickly enough**, are **incorrect or confusing**, or appear to **be in place for no reason** and are slowing traffic unnecessarily.

These views are linked to smart motorways' perceived poorer delays management.

...It was impossible to reach 10mph in this traffic so 50mph signage was misleading and, possibly, dangerous. Also [the] many modern signs ... never clearly described the issue in any way

The speed limits are always reduced when there is no issue..., if there had been an incident then they hadn't removed the speed quick enough.



Poorer safety perceptions for smart motorways are often driven by having no hard shoulder, but heavy traffic and the effect of temporary speed limits on some drivers' behaviour are also concerns.

...it is now incredibly dangerous ...due to ...no hard shoulder. ...we are expected to plan our breakdowns to happen only where there is a refuge area!

We no longer use lengths of smart motorway as ...we consider them to be potentially life threatening, so always have to move to other categories of road

The variable speed limits changed ... seemingly every mile - which I feel adds to the danger as vehicles frequently brake suddenly

Contact

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Transport Focus is the operating name of the
Passengers' Council