

Strategic Roads User Survey

2023/24 annual report





Foreword

Transport Focus' new business plan sets out our commitments to transport users. The first is to improve transport in ways that matter most to users. For users of National Highways' Strategic Road Network (SRN) this means improving satisfaction, as measured by our Strategic Roads User Survey (SRUS).

This is a key piece of insight as the independent voice of Britain's transport users and offers feedback from a representative sample of more than 9000 road users each year on their most recent journey on England's motorways and major 'A' roads.

The results from the survey are key as they are used by the Office of Rail and Road (ORR) as part of its formal assessment of National Highways' performance. More importantly, the insight is used to improve the customer experience for all road users, as the regional case studies in this report show.

The overall picture in this report is challenging. Overall, 71 per cent of road users were satisfied with their journey, this is a decrease from 73 per cent for 2022 – 2023.

Road user satisfaction with journey time has shown a decline at 68 per cent, compared with 71 per cent last year. The ORR reports¹ that average delay on the SRN in the same period was 10.6 seconds per vehicle per mile compared with 9.5 seconds in 2022-23. This



increase in average delay equates to an extra minute's driving on a 60-mile trip. Increasing traffic levels are part of the reason. In 2023 the SRN carried 95.8 billion vehicle miles of traffic. This was an increase of 2.3 per cent compared to 2022, though still 1 per cent lower than before the pandemic².

A further challenge is the ongoing programme of additional roadworks to add more than 150 emergency refuge areas to address user concerns about safer places to stop on smart motorways. All these factors make it more important to identify other ways to improve journey times and to better communicate how long journeys will take.

¹ <https://www.orr.gov.uk/annual-assessment-national-highways-performance-2023-2024>

² <https://www.gov.uk/government/statistics/road-traffic-estimates-in-great-britain-2023/road-traffic-estimates-in-great-britain-2023-traffic-on-englands-road-networks>

Satisfaction with road surface quality has also declined to 68 per cent compared with 73 per cent last year. In the same period ORR reports that National Highways met its in-year target of 96.2 per cent of road surface being in good condition. It is clear that users feel improvement is still required. This comes at a time when there's a debate about where scarce public resources should be spent, including in relation to roads. Our research shows users support prioritising getting the basics right and properly maintaining National Highways' existing roads over building new ones³. We intend to help National Highways to implement the most customer focussed ways to do this.

As part of our renewed focus on improving satisfaction we are putting fresh emphasis on the performance of the individual National Highways regions, and this year's league table on page 22 shows



³ <https://www.transportfocus.org.uk/publication/road-users-priorities-for-improvement/>

where satisfaction is getting better or worse.

The South West region continues to have the highest level of overall satisfaction at 76 per cent, while the M25 region is lowest at 68 per cent. The North West has shown marked improvement, moving from joint bottom last year to second. We understand that no region is the same and each part of the network comes with different challenges, but we want to spotlight improvement and encourage sharing of best practice which could drive up satisfaction elsewhere.

We are determined to have more impact for users, so we are starting to work more closely with National Highways. We will be focussing our efforts on journey time and road surface quality – which our insight has consistently shown are key priorities for users. We are pleased that National Highways has responded positively to our challenge to work together more effectively.

Though it will take time for future changes to policies and practices to flow through to improved journeys and increased satisfaction, we're optimistic and excited about what can be achieved. Meanwhile the SRUS will continue to ask road users about their journeys – their verdict is the ultimate test of the success of this work.

Louise Collins

Director

Key findings

The Strategic Roads User Survey (SRUS) measures the consumer experience of driving on England's motorways and major 'A' roads, the strategic road network managed by National Highways on behalf of the government.

Summary of findings for April 2023 to March 2024

- Overall, 71 per cent of road users were satisfied with their last motorway or major 'A' road journey, a drop from last year's 73 per cent.
- Road user satisfaction with journey time at 68 per cent has also shown a decline compared with last year's 71 per cent.
- Satisfaction with road surface quality - another key user priority - has also declined at 68 per cent compared with 73 per cent last year.
- Management of roadworks continues to be one of the weaker performing areas with 49 per cent of those passing through roadworks on their journey satisfied with their management, similar to last year.



There is some variation between National Highways regions

- The South West region has maintained its position as the best performing region with overall satisfaction at 76 per cent. Other regions score between 68 and 73 per cent for overall satisfaction, with the M25 region scoring lowest at 68 per cent.
- The North West has improved its position in the rankings from joint bottom last year to second this year, along with an improved position in the rankings for a number of other metrics.
- The North West is the only region to show an increase in satisfaction with journey time compared to last year and, while satisfaction with the road surface has declined, the decrease is smaller than most other regions. These factors might explain why the North West is the only region to show an increase in overall satisfaction since last year and therefore a rise in the rankings.

“Good availability of EV charging at service stations and good food options. Good road surface from what I can remember. A bit frustrating that I had to use the M4 bridge, but that was due to high winds closing the M48.”

M4, very satisfied

Results for individual roads

- The A19 achieves the highest level of overall satisfaction with 85 per cent, followed by the M40 – the highest rated motorway - at 79 per cent, and the M4 at 78 per cent satisfied*.
- The A19 and M40 also top the table for satisfaction with journey time with 82 per cent and 76 per cent respectively.
- The A19 also tops the table for road surface with 89 per cent satisfied. Last year’s best performing road for surface quality, the M4, comes in second at 79 per cent.
- The A12 has the lowest level of overall satisfaction at 55 per cent, even lower than last year’s figure of 61 per cent. It is rated poorly on journey time and road markings at 56 per cent and 64 per cent respectively. But the stark issue about the A12 is the road surface, scoring just 34 per cent. This continues to be the worst performing road for road surface by a long way (the next lowest is the A47 with 52 per cent) and scores even lower than last year’s rating of 44 per cent.
- Drivers travelling on the A3 encountered higher than average levels of congestion (19 per cent versus 10 per cent for all roads) and recorded low satisfaction with journey time (59 per cent versus 68 per cent for all roads), likely due to the ongoing roadworks at the Wisley Interchange. This in turn affected its

* Among those with 100 survey responses or more. The A303 was the top performing road last year, but had fewer than 100 survey responses in 2023/24 so does not feature in the ranking of individual roads this year.

overall satisfaction rating (64 per cent versus 73 per cent last year) and caused it to drop down the rankings.

- Of the motorways, the M42 has the lowest level of road user satisfaction at 56 per cent, which is down from 68 per cent last year. Satisfaction with journey time on the M42 has declined at 53 per cent versus 66 per cent last year. Drivers experienced much heavier traffic with an average of 37 per cent reporting heavy/congested traffic on this route versus 25 per cent for all roads. 50 per cent of drivers passed through roadworks on this motorway versus 27 per cent for all roads.
- The M6, which was the poorest performing motorway last year, has improved its satisfaction rating - 71 per cent versus 66 per cent last year - and is now mid-table in the rankings. While M6 journeys encountered considerably more roadworks than average with 41 per cent of drivers passing through roadworks versus 27 per cent for all roads, the proportion has reduced from 48 per cent last year. Satisfaction with journey time is now similar to the average for all roads at 66 per cent versus 68 per cent for all roads.

Smart motorways

- Drivers were less satisfied when their journey included travelling on smart motorways – typically among the busiest and most congested parts of the road network – in comparison to journeys that did not include a smart section. These results - smart 68 per

cent; no smart 75 per cent - were similar to last year.









- Among those smart motorway journeys, those with 'all-lane running' scored higher at 69 per cent than 'dynamic hard shoulder' scoring 62 per cent, and 'controlled' sections at 66 per cent
- Journeys involving a smart motorway section continue to be rated lower for feeling safe (smart 77 per cent; not smart 82 per cent), although there remains little difference between the three types of smart motorway in terms of feeling safe.

Case study

South West

The South West region scored above the national average on all aspects of the journey but satisfaction with journey time had declined over the last year. The South West has been prompted by this downward trend to sharpen its focus on contributory factors. The regional network has long stretches of road through rural areas with few adequate alternatives available if there is disruption, so working to reduce the time it takes to clear incidents is key to reducing delays to users. Extra actions taken to benefit users include making sure Traffic Officer and recovery service resources are in the best locations and improving the management of HGV breakdowns.

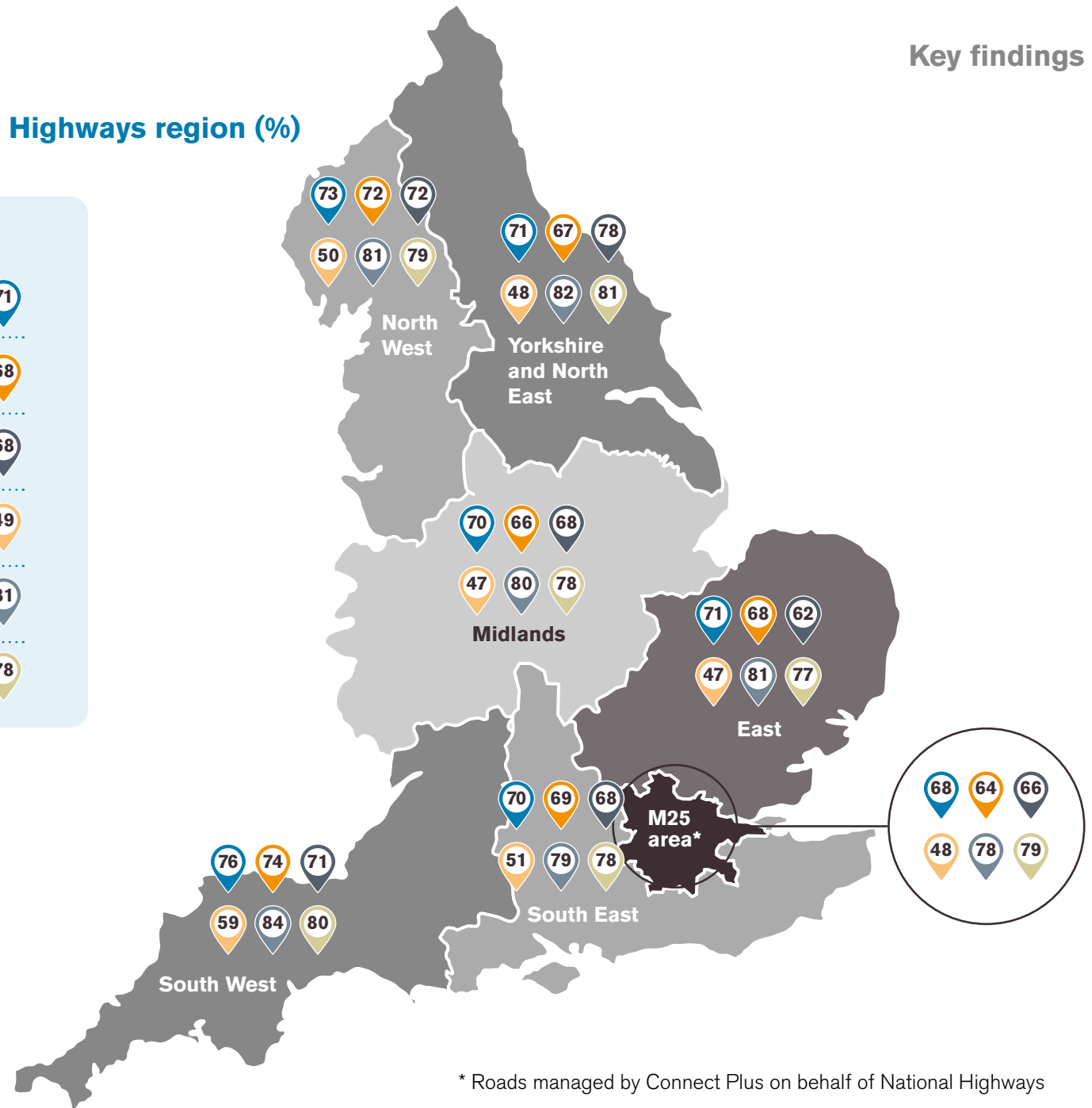
Satisfaction with journeys on England's motorways and major 'A' roads (%)

| | 2023/24 | 2022/23 |
|--|-----------|-----------|
|  Overall satisfaction | 71 | 73 |
|  Journey time | 68 | 71 |
|  Roadworks management | 49 | 48 |
|  Road surface | 68 | 73 |
|  Feeling safe | 81 | 82 |
|  Information: Permanent signs | 79 | 80 |
|  Information: Electronic signs | 70 | 70 |
|  Road markings | 78 | 80 |

Journey satisfaction by National Highways region (%)











England (%)












| | | |
|---|----------------------|----|
|  | Overall satisfaction | 71 |
|  | Journey time | 68 |
|  | Road surface | 68 |
|  | Roadworks management | 49 |
|  | Feeling safe | 81 |
|  | Road markings | 78 |











* Roads managed by Connect Plus on behalf of National Highways

Overall satisfaction in more detail (%)

| | | |
|---|---|-----------|
|  | Overall satisfaction | 71 |
|  | Motorway users | 72 |
|  | Major 'A' road users | 70 |
|  | Motorway journey - included a 'smart' section | 68 |
|  | All-lane running | 69 |
|  | Dynamic hard shoulder | 62 |
|  | Controlled | 66 |
|  | Motorway journey - no 'smart' section | 75 |
|  | Male | 70 |
|  | Female | 74 |

| | | |
|---|---------------------------------------|-----------|
|  | Age 17 - 34 | 70 |
|  | Age 35 - 59 | 70 |
|  | Age 60+ | 72 |
|  | Disabled people | 72 |
|  | Non-disabled people | 72 |
|  | Prefer not to say | 58 |
|  | Passed through roadworks | 57 |
|  | Did not pass through roadworks | 78 |
|  | Commuter | 66 |
|  | Any work reason | 64 |
|  | Leisure | 73 |

Overall satisfaction in more detail continued (%)

| | | |
|---|------------------------------|----|
|  | Car | 72 |
|  | Vans | 64 |
|  | LGV/HGV (3.5 tonnes or more) | 59 |
|  | Battery electric cars | 75 |
| <hr/> | | |
|  | Weekday AM peak | 70 |
|  | Weekday PM peak | 66 |
|  | Weekday off-peak | 71 |
|  | Weekend/bank holiday | 75 |

“Going through the Dartford tunnel is always a nightmare and always a traffic jam in normal hours of travelling.”

A282, fairly dissatisfied





**What influences
road user
satisfaction?**

What influences road user satisfaction?

Analysis of SRUS data shows the following aspects of the journey to have the greatest influence on road users' overall satisfaction with their journey. In order, they are:



1. Satisfaction with journey time



2. Journey time compared to expectation



3. Whether there were delays caused by things other than roadworks



4. Level of traffic



5. Road markings



6. How safe it felt on the road



7. Road surface

Satisfaction with journey time is the aspect that has by far the greatest impact on overall satisfaction. Satisfaction with journey time, road markings, feeling safe and road surface all correlate positively with overall satisfaction. Those satisfied with these journey aspects are more likely to be satisfied overall. Other journey aspects correlate negatively, so those experiencing a longer journey time than expected, experiencing delays other than roadworks, and experiencing higher levels of traffic are less likely to be satisfied overall.

The results of the analysis are consistent with previous years, with the exception of satisfaction with road markings which has moved up into fifth place, with how safe users felt on the road in sixth place. Satisfaction with the road surface remains an important factor, in seventh place.

"Variable speed limits do not always reflect the traffic conditions. Directed to reduce speed for no apparent reason."

M42, fairly satisfied

"Clear road, decent surface, good markings."

A19, very satisfied

"Poor road quality and maintenance."

A12, neither satisfied nor dissatisfied

What influences road user satisfaction?

These influences can be seen clearly in the overall satisfaction scores. For example:

- Among those satisfied with journey time, 91 per cent were satisfied overall. When dissatisfied with journey time, just 17 per cent were satisfied overall.
- When the journey took less time than expected, 92 per cent were satisfied overall, compared with 36 per cent among those whose journey took longer than expected.
- Among those who experienced light traffic, 89 per cent were satisfied overall, whereas only 28 per cent of those experiencing congestion were satisfied overall.
- 79 per cent of those satisfied with road markings were satisfied overall, whereas among those dissatisfied with road markings just 30 per cent were satisfied.
- 78 per cent of those who felt safe while travelling were satisfied overall, whereas just 30 per cent of those who did not feel safe were satisfied.
- 82 per cent of those satisfied with the road surface were satisfied overall, compared with 41 per cent of those dissatisfied with the road surface.

Among those drivers who passed through roadworks during their journey, satisfaction with the management of those roadworks is also a key influence on overall satisfaction.

- Among those satisfied with management of roadworks, 79 per cent were satisfied overall, compared with just 23 per cent of those dissatisfied with management of roadworks.

Influences on satisfaction are broadly consistent across regions.

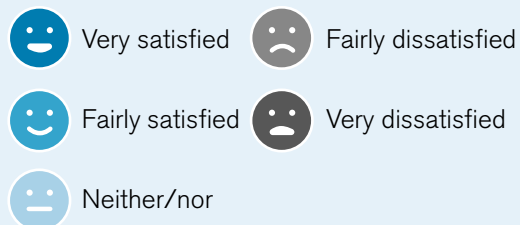


What influences road user satisfaction?

Trends

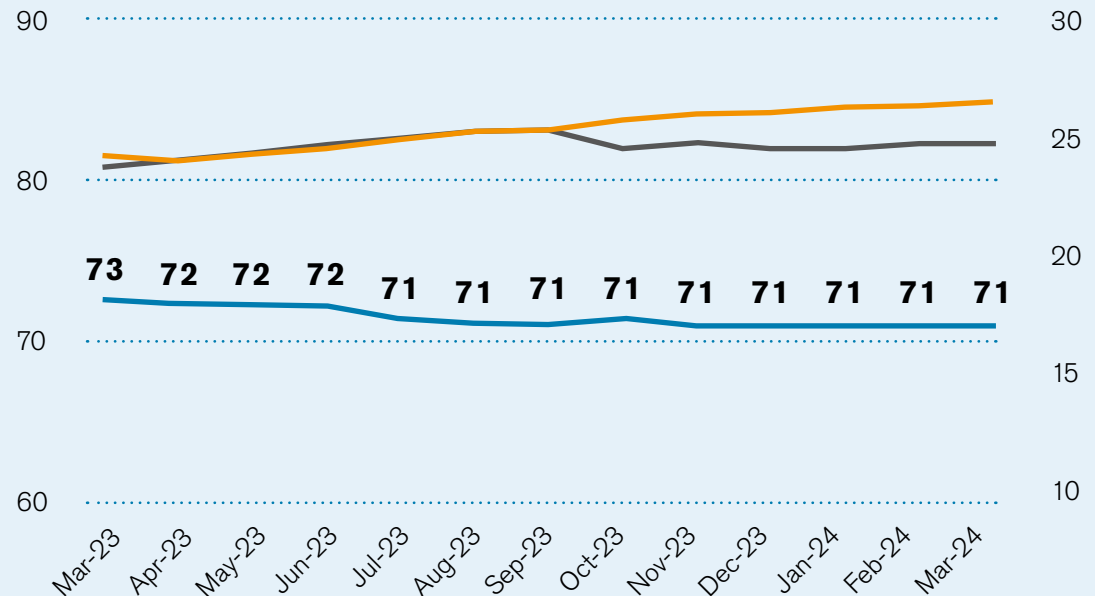
Overall satisfaction has decreased since last year (looking at rolling annual average trend data) but has stabilised at 71 per cent for the last nine months, despite an increase in road users reporting passing through roadworks. Satisfaction with most key areas has remained consistent over time, but there are clear downward trends for journey time and road surface.

Overall satisfaction (%)



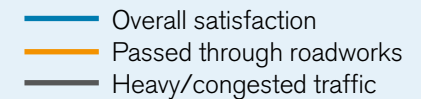
Base: 9118 all SRN users surveyed, April 2023 – March 2024

Overall satisfaction (%)



Rolling last 12 months vs. perceived level of traffic and roadworks

Base: 9089 (average per 12 month period) all SRN users surveyed, April 2022 – March 2024



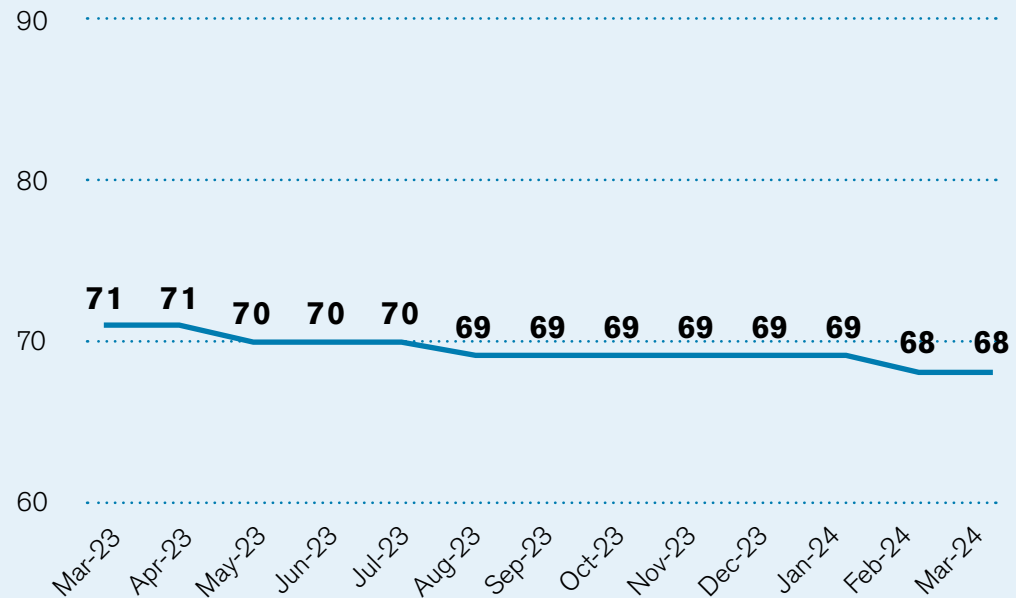
What influences road user satisfaction?

Satisfaction with journey time

Satisfaction with journey time has dropped. Given the importance of journey time to overall satisfaction, this similar pattern is unsurprising.



Satisfaction with journey time (%)



Rolling last 12 months

Base: 9096 (average per 12 month period) all SRN users surveyed, April 2022 - March 2024

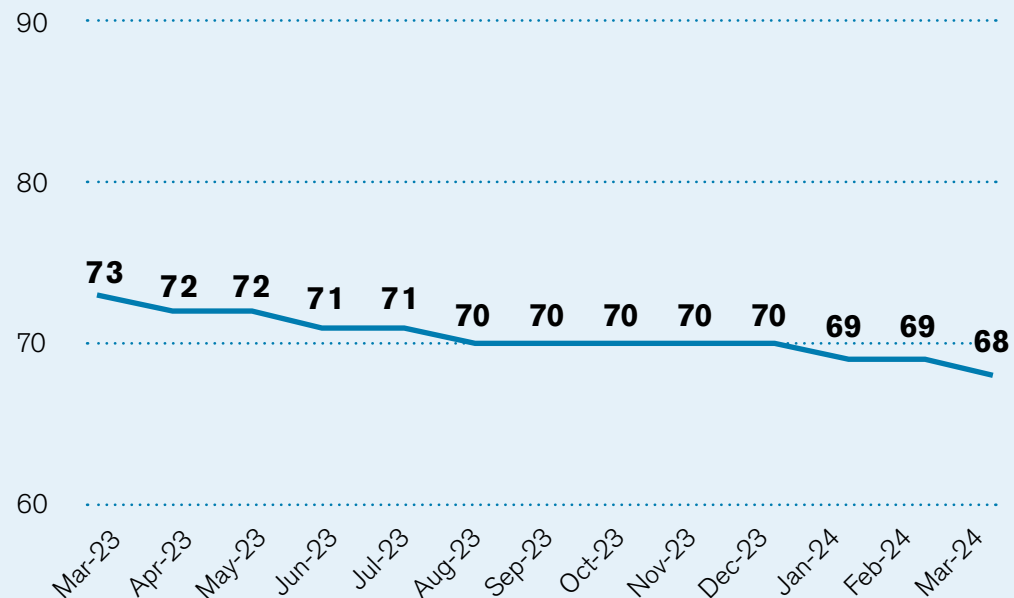
What influences road user satisfaction?

Satisfaction with road surface

Satisfaction with road surface has shown a more marked decline, with the latest 12-month period showing just 68 per cent satisfaction. This ties in with regular mentions of potholes (and poor road surface more generally) by respondents when asked why they rated their level of overall satisfaction as they did.



Satisfaction with road surface (%)



Rolling last 12 months

Base: 9004 (average per 12 month period) all SRN users surveyed, April 2022 - March 2024

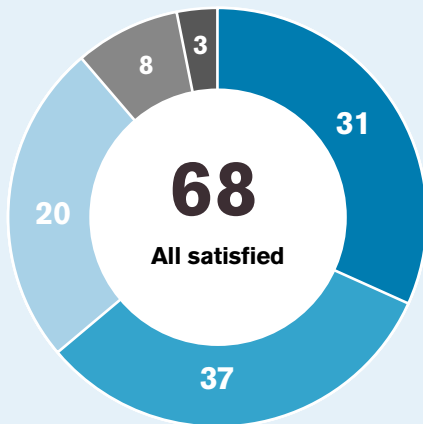


Key areas of focus

Journey time

Road user satisfaction with 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 (%)



- Very satisfied
- Fairly satisfied
- Neither/nor
- Fairly dissatisfied
- Very dissatisfied

Base: 9131 all SRN users surveyed, April 2023 – March 2024

21%

A fifth of journeys are reported to take longer than expected

Base: 8549 all SRN users surveyed, April 2023 – March 2024

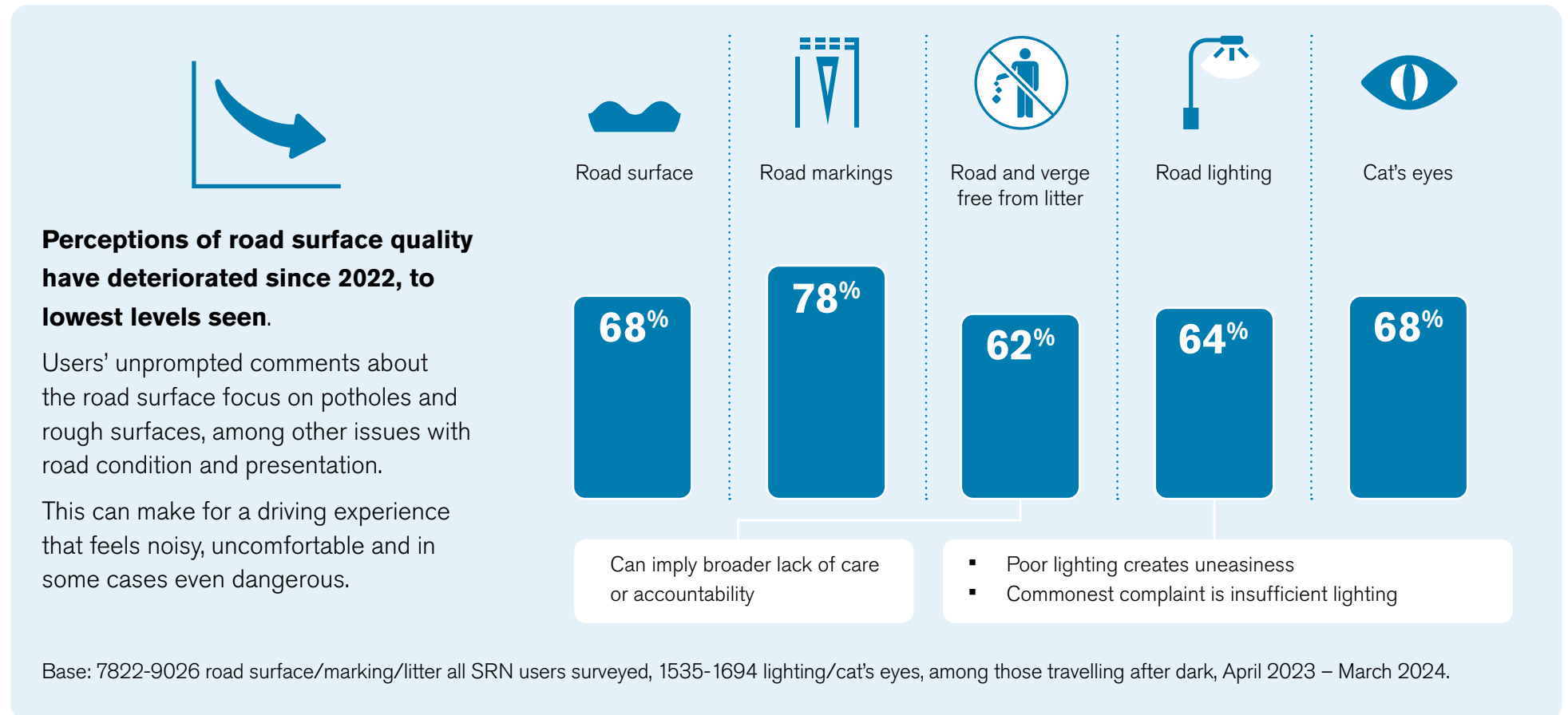
Key factors influencing journey times

| | Journeys reported as affected | Satisfied with management | |
|--------------------------|-------------------------------|---------------------------|---|
| Heavy congestion/traffic | 25% | Not applicable | |
| Road works | 27% | 49% | <ul style="list-style-type: none"> ▪ Adds reported 12 mins to journeys on average |
| Other delays | 17% | 27% | <ul style="list-style-type: none"> ▪ Adds reported 18 mins to journeys on average ▪ Less frequent than roadworks but more dissatisfaction when unplanned delays are encountered |

Base: 9049 all SRN users surveyed, 2304 all affected by roadworks, 1354 all affected by other delays - April 2023 – March 2024

Road condition rating

Poor road surface and presentation (lighting, litter, markings) can cause both discomfort and perceived risk. Road surface is the most important issue, as users' top priority for improvement, but neither lighting nor litter are rated well.



League tables

As seen in the map on page 9, there is some variability in satisfaction scores between the regions. However, the South West is the best performing region for many of the key metrics and the M25 region either low or bottom in the rankings. The North West has improved its ranking for overall satisfaction and a number of other measures.

For overall satisfaction, the South West takes top spot (76 per cent), although it has seen a significant decrease in satisfaction since last year. The M25 region is at the bottom (68 per cent). A similar picture for South West and M25 is seen for satisfaction with journey time, the key influence on overall satisfaction.

“Clear road, not too busy, speed controls and advice good.”

M4, very satisfied

“Very long queue to get from the M25 onto the A3, took 45 minutes.”

M25, very dissatisfied

“Had to stop to recharge car a little and limited charging facilities at service stations.”

M40, fairly satisfied







Case study

North West

A ‘deep dive’ into SRUS data for National Highways North West region helped it to better understand what makes people driving in its region satisfied or dissatisfied. It also helped understand the full impact of frequent major roadworks on busy sections of the North West’s network. The North West Customer Working Group and the regional management team used the insight to increase the focus on effective management of roadworks in its regional customer plan.



National Highways regions - ranking and satisfaction

| Overall rank | Region |  Overall satisfaction |  Journey time |  Road surface |  Roadworks management |  Feeling safe |  Road markings |
|--------------|--------------------------|--|---|--|--|--|---|
| 1 | South West | 1 76% ↓ | 1 74% ↓ | 3 71% ↓ | 1 59% | 1 84% | 2 80% |
| 2 | North West | 2 73% | 2 72% | 2 72% | 3 50% | 3= 81% | 3= 79% |
| 3 | Yorkshire and North East | 3= 71% | 5 67% | 1 78% | 4= 48% | 2 82% | 1 81% |
| 4 | East | 3= 71% | 4 68% | 7 62% ↓ | 6= 47% | 3= 81% ↓ | 7 77% |
| 5 | Midlands | 5= 70% | 6 66% ↓ | 4= 68% ↓ | 6= 47% | 5 80% | 5= 78% |
| 6 | South East | 5= 70% | 3 69% | 4= 68% ↓ | 2 51% | 6 79% | 5 78% |
| 7 | M25 | 7 68% | 7 64% | 6 66% ↓ | 4= 48% | 7 78% | 3= 79% |
| | All regions | 71% ↓ | 68% ↓ | 68% ↓ | 49% | 81% | 78% ↓ |

↓ Denotes a significant decrease in score (at a 95 per cent confidence level) versus 2022 - 2023.

Yorkshire and North East tops the table for satisfaction with road surface (78 per cent), one of only two regions not showing a significant decrease since last year, the other being North West, in second place (72 per cent). The East is the worst performing region by some distance (62 per cent), driven by the very poorly performing A12 (34 per cent).

The South West tops the rankings for satisfaction with management of roadworks (59 per cent), scoring much higher than the rest of the regions.

Case study

Yorkshire and North East

The regional team acted on the SRUS insight showing that satisfaction is higher if people are aware of roadworks before they begin their journey. For roadworks that will disrupt road users, such as the A66 Long Newton scheme, they have since provided road users with earlier warning of the upcoming works with signs, press releases and letter drops, so they can make informed decisions and plan ahead.

“Traffic was not heavy, few lorries, other drivers were sensibly driving.”

M5, fairly satisfied

“The current roadworks slow down the travelling time. But this is expected as roadworks are necessary.”

A12, fairly satisfied






“Potholes in all lanes, debris on the roads, overhead matrix giving delayed or out of date restrictions.”

M60, fairly dissatisfied








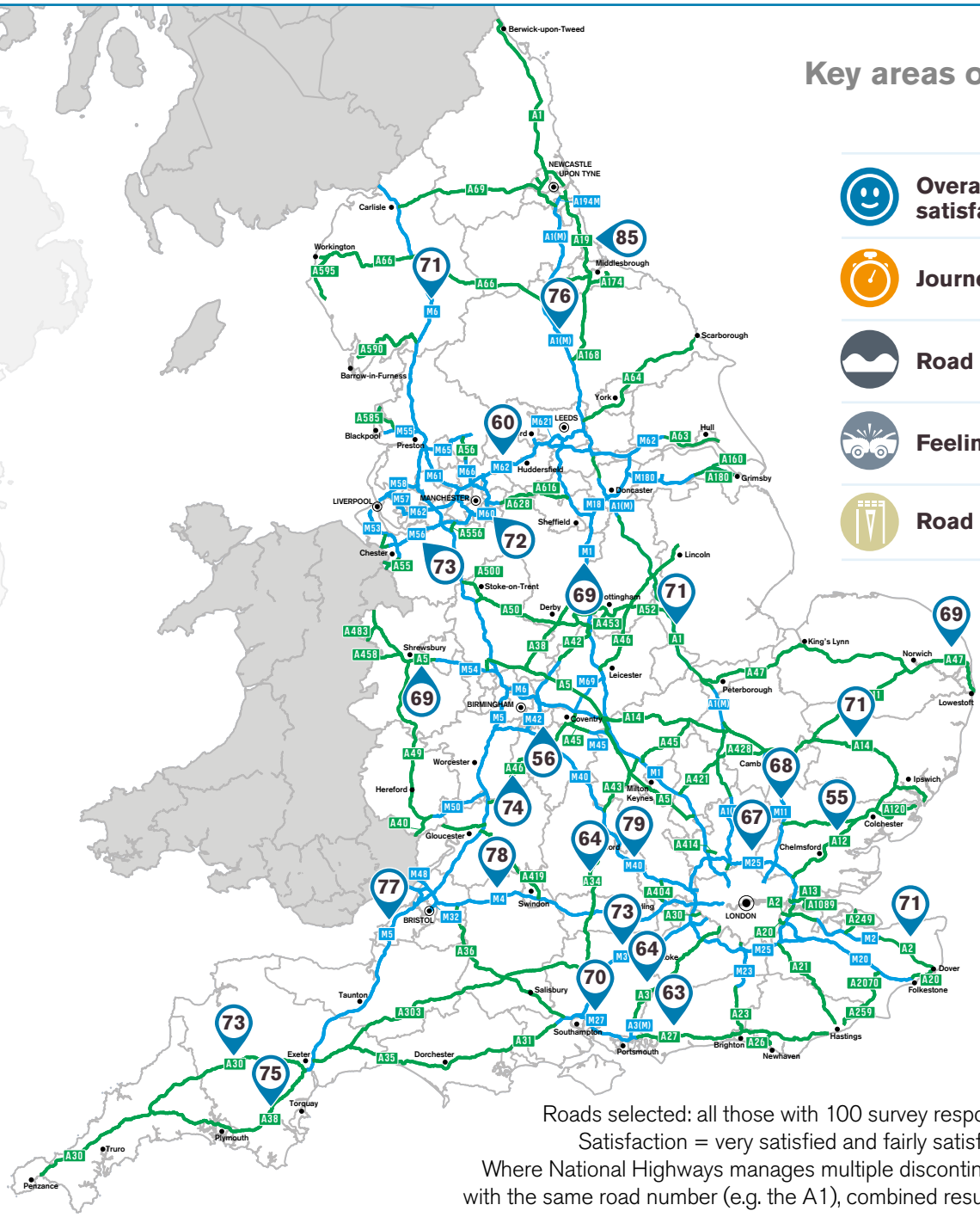
Strategic Roads User Survey 2023/24

– results for selected roads

| Overall rank | |  |  |  |  |  |
|--------------|-------|---|---|---|---|---|
| | | % | % | % | % | % |
| 1 | A19 | 85 | 82 | 89 | 87 | 86 |
| 2 | M40 | 79 | 76 | 74 | 84 | 87 |
| 3 | M4 | 78 | 72 | 79 | 84 | 84 |
| 4 | M5 | 77 | 75 | 73 | 86 | 83 |
| 5 | A1(M) | 76 | 73 | 75 | 86 | 83 |
| 6 | A38 | 75 | 69 | 68 | 78 | 79 |
| 7 | A46 | 74 | 72 | 65 | 86 | 79 |
| 8 | M56 | 73 | 73 | 69 | 85 | 80 |
| 9 | A30 | 73 | 73 | 68 | 84 | 76 |
| 10 | M3 | 73 | 73 | 76 | 78 | 81 |
| 11 | M60 | 72 | 69 | 79 | 80 | 85 |
| 12 | M6 | 71 | 66 | 68 | 75 | 77 |
| 13 | A1 | 71 | 65 | 71 | 82 | 78 |
| 14 | A2 | 71 | 72 | 66 | 86 | 86 |
| 15 | A14 | 71 | 66 | 60 | 81 | 76 |
| 16 | M27 | 70 | 70 | 61 | 72 | 73 |
| 17 | M1 | 69 | 63 | 71 | 76 | 82 |
| 18 | A47 | 69 | 65 | 52 | 76 | 66 |
| 19 | A5 | 69 | 63 | 67 | 85 | 77 |
| 20 | M11 | 68 | 70 | 58 | 79 | 71 |
| 21 | M25 | 67 | 61 | 64 | 74 | 79 |
| 22 | A34 | 64 | 69 | 68 | 78 | 77 |
| 23 | A3 | 64 | 59 | 67 | 84 | 75 |
| 24 | A27 | 63 | 64 | 58 | 79 | 75 |
| 25 | M62 | 60 | 61 | 71 | 78 | 78 |
| 26 | M42 | 56 | 53 | 70 | 75 | 71 |
| 27 | A12 | 55 | 56 | 34 | 79 | 64 |

Key areas of focus

-  Overall satisfaction
-  Journey time
-  Road surface
-  Feeling safe
-  Road markings



Roads selected: all those with 100 survey responses or more.
 Satisfaction = very satisfied and fairly satisfied combined.
 Where National Highways manages multiple discontinuous sections with the same road number (e.g. the A1), combined results are shown.



More information, including drivers' comments, can be viewed in the Transport Focus data hub – new data is added each month.

About the survey

- This report contains data from 1 April 2023 to 31 March 2024 and is based on 9166 interviews with road users.
- SRUS uses a 'push to web' method where households within a representative sample of the driving population in England are sent a letter inviting them to complete the survey, which they then do online.
- The survey asks about various aspects of journey experience.
- An interactive map is integrated into the questionnaire and 'understands' which part of a journey is on the Strategic Road Network.
- Results are weighted to ensure they are representative of vehicle mileage across the Strategic Road Network.
- Due to a change of research method in April 2021, results up to March 2020 are not directly comparable with those from April 2021.
- The factors influencing satisfaction are determined using a Gamma coefficient technique, a nonparametric bivariate test that quantifies the strength of relationship between the results for each individual SRUS question and overall satisfaction.
- Since April 2021 the delivery of the survey has been supported by the research agency BMG Research.
- Satisfaction = very satisfied and fairly satisfied combined.

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Transport Focus is the operating name of the Passengers' Council

Transport Focus

The voice of Britain's transport users

We listen to the public and find out their experience of using, or trying to use, Britain's railways and England's buses, coaches, trams and motorways and major 'A' roads.

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