



# Logistics and Coach Survey:

Strategic Roads

2023/24

# Foreword

**M**any of us are used to thinking of the journeys we make on motorways and major 'A' roads by car – to work, on holiday, for family visits. But key users of these roads are businesses moving goods around the country, whether that be materials to factories, supplies to our supermarket shelves, deliveries of finished product, or items that we are exporting. And yet, of those businesses moving goods by lorry, just 44 per cent are satisfied that the roads managed by National Highways are meeting their business needs. It is the same story with coach companies, and the number has been gradually falling.

44 per cent overall satisfaction is 25-40 percentage points below the satisfaction level we see in other areas of transport user experience (and 29 per cent overall dissatisfaction is much higher). Is 44 per cent good enough? It doesn't feel like it to us and that is why in the new Transport Focus business plan, we intend to work with National Highways and other stakeholders to help increase satisfaction among logistics and coach businesses, not least through an emphasis on treating them as valued customers.

Logistics and coach businesses rate rest stops on National Highways roads even lower, ranging from nine per cent for value for money to 23 per cent for how many stopping places there are. Those are the views of businesses, but what do drivers think? Transport Focus will shortly publish the results of its new Lorry Driver Facilities Survey, which measures the experience of lorry drivers when using truck stops and services on National Highways roads. Understanding both elements is crucial for stakeholders working together to drive the right improvements in this long-neglected area.

The Logistics and Coach Survey, referred to in the current Road Investment Strategy, is expected to become an official indicator of National Highways performance shortly. In preparation, National Highways has briefed us on its Customer Journey Mapping activity and we will look forward to further engagement leading to improvements for these key users of England's motorways and major 'A' roads.

**Guy Dangerfield**

Head of Strategy and Intelligence

# 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.

Less than half (44 per cent) were satisfied overall, while almost one in three were dissatisfied (29 per cent). Overall satisfaction for the freight sector was also 44 per cent. Among those using articulated lorries (made up of two separate sections – a driving

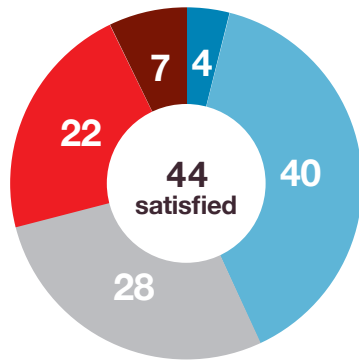
cab and a trailer) satisfaction was 41 per cent. Among those using rigid lorries (those without a separate driving cab) satisfaction was 46 per cent. The satisfaction figure for the coach sector was also 44 per cent.

Over the four years of this survey, overall satisfaction was 55 per cent in 2020-21, 46 per cent in 2021-22, 49 per cent in 2022-23, and 44 per cent 2023-24.

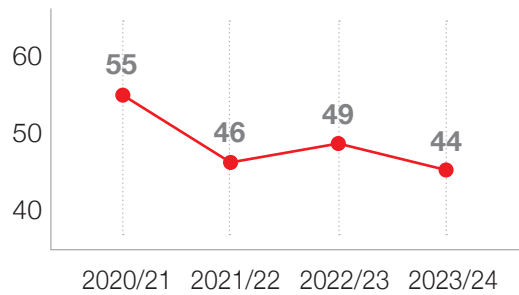
Overall satisfaction (%)

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

Sample size = 980



Overall satisfaction 2020 – 2024 (%)





## Planning routes

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

44 per cent of managers rated as ‘good’ the ability to plan routes – this was the highest rating in the route planning section. Only about a quarter of managers (25 and 23 per cent respectively) rated as good the ‘information to estimate extra journey time due to roadworks’ and ‘information about how suitable diversion routes are for their vehicles’.

*“Please just use common sense. Keep drivers fully informed with delay. Only use LED signage when absolutely necessary.”*

Freight manager

*“Roads to be well maintained and any restriction commercial traffic given priority.”*

Freight manager

*“Speed of work, not having 20+ miles of roadworks in one go with nobody working on them, remove signs stating “we’re only working Monday to Friday for our staffs fatigue” while causing thousands of hours delays for other people.”*

Freight manager

**Q** When organising these routes/schedules, how do you rate the availability of information about these roads to:

	Very poor	Fairly poor	Neither good nor poor	Fairly good	Very good	All good
Help you plan routes	4	15	37	39	5	44
Estimate journey times	5	18	34	38	4	42
Know when roadworks will close roads completely	13	28	27	28	4	32
Estimate the extra journey time roadworks will add	13	30	32	22	2	25
Know how suitable diversion routes will be for your lorries [buses/coaches]	22	29	27	22	1	23

Sample sizes = 840, 834, 842, 836, and 835 respectively

Just over three quarters of vehicle managers are involved in route planning on the day, or within a few days of their vehicles’ journeys. On half of these journeys the arrival time window is 30 minutes or less, and just over half say their vehicles’ journeys on National Highways roads are more than five hours.

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

*“When problems are reported on signs, please put names of place, a junction reference too, i.e. rather than delays J25-26, put J25 Brighouse -J26 Bradford. From M62.”*

Coach manager

## On the day information

Less than half of those surveyed rated as good availability of live travel information. Information about overrunning roadworks is rated particularly low, with 22 per cent saying it is good.

*“System put in place that Transport Manager and office staff can access, that gives information on future roadworks, and also up to date information on delays and accidents, with possible diversions.”*

Freight manager

Q How do you rate ‘real time’ information in terms of telling you about...	Very poor	Fairly poor	Neither good nor poor	Fairly good	Very good	All good
Unexpected levels of congestion	6	18	30	41	4	46
Road or lane closures due to roadworks	6	21	33	36	4	40
Road or lane closures due to accidents	6	18	33	38	5	43
Road closures due to bad weather	6	20	37	34	3	37
Roads not opening on time after roadworks	15	31	31	20	3	22

Samples sizes = 951, 950, 952, 938, and 937 respectively

## Responding to incidents and accidents

The ratings for responding to incidents and accidents are low on all aspects; the best rating being just over a quarter saying ‘good’. Notable are the particularly low ratings for considering ‘driver hours’, ‘goods carried’, ‘passenger welfare (coach firms)’, ‘being kept informed of the likely length of delay’ and ‘suitability of diversionary routes for your lorries’. In feedback we’ve received, there is often a feeling that it takes a disproportionate amount of time to clear minor incidents.

*“Accident investigation should be speeded up, far too long re-opening roads. In Europe the roads open within an hour. They take photos of the area and measurements are taken from them.”*

Freight manager

Q From a business standpoint, how do you rate handling of accidents and incidents on these roads in terms of:	Very poor	Fairly poor	Neither good nor poor	Fairly good	Very good	All good
Time it usually takes to re-open them	21	27	25	23	3	27
Extent drivers' working hours are considered	25	31	27	15	1	16
Extent type of goods being carried is considered*	19	24	43	13	2	14
Extent passenger welfare is considered**	35	21	35	8	1	9
Being kept informed of the likely length of delay	24	35	25	15	2	17
Suitability of diversionary routes for your lorries [buses/coaches]	25	32	28	15	1	16

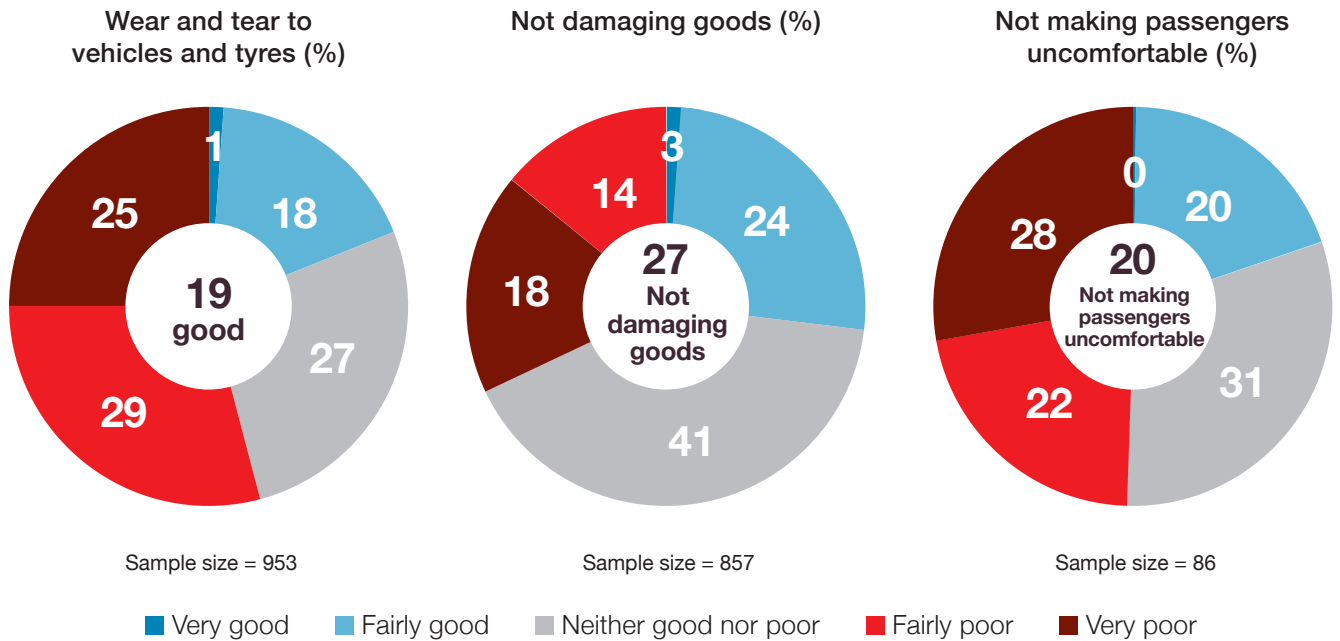
\* asked of freight managers only, \*\* asked of coach managers only.

Samples sizes = 950, 939, 815, 85, 947, and 951 respectively

## Road surface

When it comes to ‘road surfaces minimising wear and tear to vehicles or tyres, just under 20 per cent of managers rated surfaces as good, with just over a half rating them poor.

In terms of road surfaces ‘not damaging goods,’ around a quarter of freight managers rated them as good, with a fifth of coach managers rating surface quality as good for ‘not making passengers uncomfortable’.



## Rest stops

14 per cent of vehicle managers rated vehicle security as good, while driver facilities received a ‘good’ rating from 17 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 10 saying this was good (nine per cent).

*“Motorways and A roads are on the whole well maintained, but safe, secure and affordable parking for HGVs is wholly inadequate, as are the facilities for drivers.”*

Freight manager

Q Thinking about stopping places on the roads for your lorries [buses/coaches] and drivers from a business perspective, how do you rate the following:

	Very poor	Fairly poor	Neither good nor poor	Fairly good	Very good	All good
How many there are	32	27	18	21	2	23
Availability of spaces for your lorries [buses/coaches]	35	30	18	16	2	17
Quality of facilities for your drivers	40	26	16	16	1	17
Security of your lorries [buses/coaches] when parked	42	23	20	13	1	14
Their value for money	45	24	22	8	1	9

Sample sizes = 938, 942, 935, 927, and 907 respectively

## View of how National Highways manages these roads

On day-to-day management of National Highways' roads, safety scored highest, with 60 per cent rating it good. 44 per cent rated keeping roads open in bad weather good. Around a third of vehicle managers rated as good both the 'efforts being made to make journey times reliable (35 per cent) and 'journey times as fast as possible' (30 per cent).

*“National Highways to engage with bus operators through CPT and actually do something to make things change.”*

Coach manager

Q From a business standpoint, how do you rate National Highways' management of these roads in terms of:

	Very poor	Fairly poor	Neither good nor poor	Fairly good	Very good	All good
Making journey times as reliable as possible	6	16	43	33	2	35
Making journey times as fast as possible	7	19	43	28	2	30
Road safety	5	7	28	51	9	60
Keeping roads open in bad weather	8	13	35	39	5	44

Sample sizes = 950, 950, 954 and 950 respectively

Looking at the more 'strategic' aspects of network management, ratings of 'good' are lower and 'poor' are higher. When it comes to managers' needs being understood, or being considered in the 'medium to long-term planning for these roads,' less than one in five gave a good rating, with just over two in five rating it poor.

*“Freight traffic prioritised over private and leisure traffic like it is on the European continent and most other countries.”*

Freight manager

Q How do you rate National Highways in respect of:

	Very poor	Fairly poor	Neither good nor poor	Fairly good	Very good	All good
Balancing doing roadworks cost effectively with the need to minimise disruption to traffic	15	26	37	20	2	22
Understanding what your business needs from them	16	26	42	15	2	17
The extent businesses like yours matter in their medium to long-term plans	15	25	44	13	2	15

Sample sizes - 928, 928 and 911 respectively

We asked freight and coach vehicle managers about their awareness of National Highways' role. Just over three in five said they had at least a fair understanding (63 per cent) and just one third (33 per cent) said a basic understanding. Very few (four per cent) said they knew little or nothing about National Highways' role.

*“Roadworks take too long compared to our EU neighbours. Twenty months to improve a roundabout. Two years for ten miles of smart motorway. Like Germany we should be working 24/7 on roadworks, the cost to the economy would be reduced.”*

Freight manager

## What drives overall satisfaction

The extent to which the areas we asked about influences overall satisfaction is shown below.

The top three areas are: how National Highways manages the network, followed by route planning information, and then road surfaces.

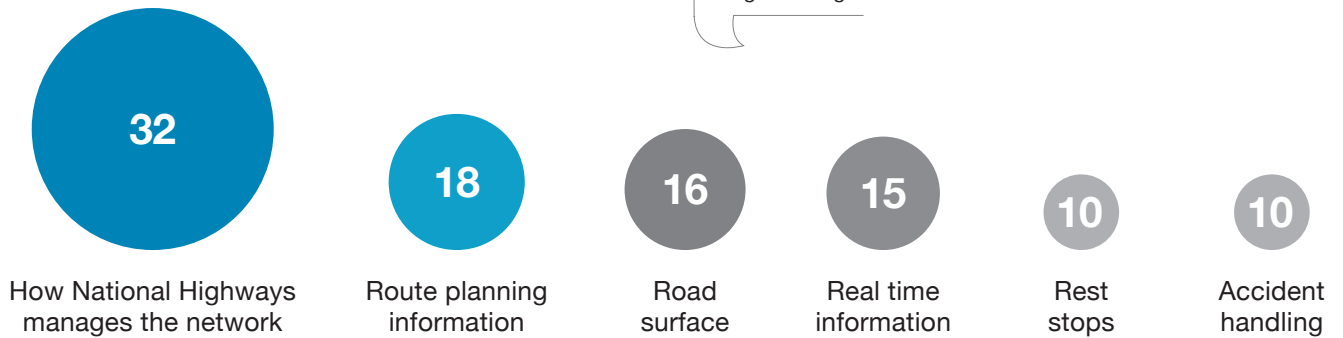
Within National Highways' management of the network, the top two measures impacting satisfaction are journey time reliability and journey speed.

*“Roadworks on one major route should not be happening all at once, for example M1-few junctions are closed causing disturbance and costly time for a long journey.”*

Coach manager

*“Barrier upgrades to be done in smaller sections.”*

Freight manager





## What needs to improve

We asked vehicle managers where they would like to see improvements. The following were frequently mentioned:

- The way roadworks are carried out. There were two main themes:
  - why is such a big area coned off, when only a little section is being worked on?

And:

- can National Highways work on multiple shorter stretches, rather than one big project?
- Clear minor incidents quicker. Managers feel it takes too long to deal with minor incidents, which are perceived to be cleared more quickly in mainland Europe.
- The availability of live information. Managers want more information on the live state of the network, as well as planned closures or restrictions due to roadworks.

*“One central online site for the provision of all relevant road information.”*

Freight manager

*“Improve all roadside facilities. Safe parking for LGVs only.”*

Freight manager

## Messages to 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 some other areas were mentioned:

- more security for lorries at rest stops
- take a more long-term assessment about quality and longevity of repairs
- think more carefully about suitability of diversion routes for freight and coaches, particularly low bridges and overhanging trees.

*“Knowledge of motorway closures. The time of opening. Diversions poor for HGV.”*

Freight manager

*“An easier warning system that can be accessed via the internet. National Highways website is not that informative.”*

Coach manager

## 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 to June, October to November and February to 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 2023-24 year. The overall number of responses was 980. Of this, 892 responses

are from freight and 88 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 National Highways 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 National Highways network by these sectors.

References to coach operators includes bus operators where they run on England's strategic roads.





## Contact Transport Focus

Any enquiries about this research should be addressed to:

Robert Pain

Insight and Evidence Manager

[robert.pain@transportfocus.org.uk](mailto:robert.pain@transportfocus.org.uk)

[www.transportfocus.org.uk](http://www.transportfocus.org.uk)

Transport Focus

7th Floor

Piccadilly Gate

Store Street

Manchester

M1 2WD

Transport Focus is the operating name of the Passengers' Council