



Logistics and Coach Survey 2025

Performance Indicator summary report

September 2025

Foreword

The logistics and coach sectors are vital pillars of the UK economy, enabling the movement of goods, services, and people nationwide. To operate effectively, these businesses need a reliable road network. That's why this work - understanding how well National Highways' roads meet the needs of logistics and coach managers - is so important.

The survey reveals consistently low approval of National Highways' roads among logistics and coach vehicle managers. Satisfaction peaked in 2020–21, as roads were quieter during COVID-19. Yet, over the subsequent period, satisfaction has declined, dropping from 44 per cent last year to just 36 per cent. The long-term downward trend is a significant concern.

This report highlights the improvements businesses want to see on England's

strategic road network. Journey speed and journey time reliability remain critical for these time-sensitive sectors. These are concerns shared by many road users. We don't underestimate the challenges for National Highways, but progress is not being felt.

The survey underscores the importance of clear and timely communication.

Businesses need to know whether diversion routes are suitable for their vehicles and whether roads will reopen in time for drivers to take their legally required breaks. Better engagement with logistics and coach businesses can help demonstrate National Highways understands how everyday road management impacts logistics and coach services —and help to inform future improvements.

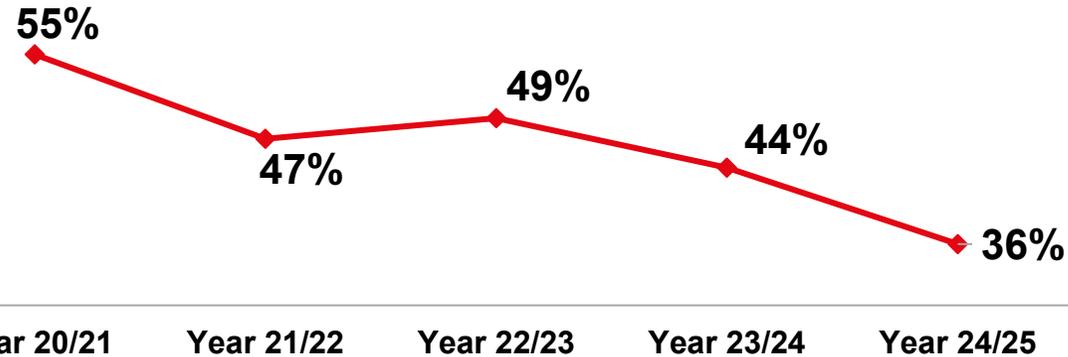
The Logistics and Coach survey is now a

formal Performance Indicator used to measure and report on National Highways' performance. It also forms a part of their Customer Service Plan for 2025-26 which outlines key priorities. As a result, National Highways has committed to delivering a programme of activities to improve customer satisfaction among logistics and coach vehicle managers.

Transport Focus is working with National Highways to shape this ongoing programme and agree priority areas for action. We're also collaborating with industry groups to develop case studies and share the everyday experiences of vehicle managers. We hope this work plays a part in delivering improvements for those who depend on England's motorways and major 'A' roads to operate effectively.

Louise Collins, Director

Performance Indicator: overall satisfaction



Over five years of the survey, **satisfaction** has largely **declined** from 55 per cent to 36 per cent.

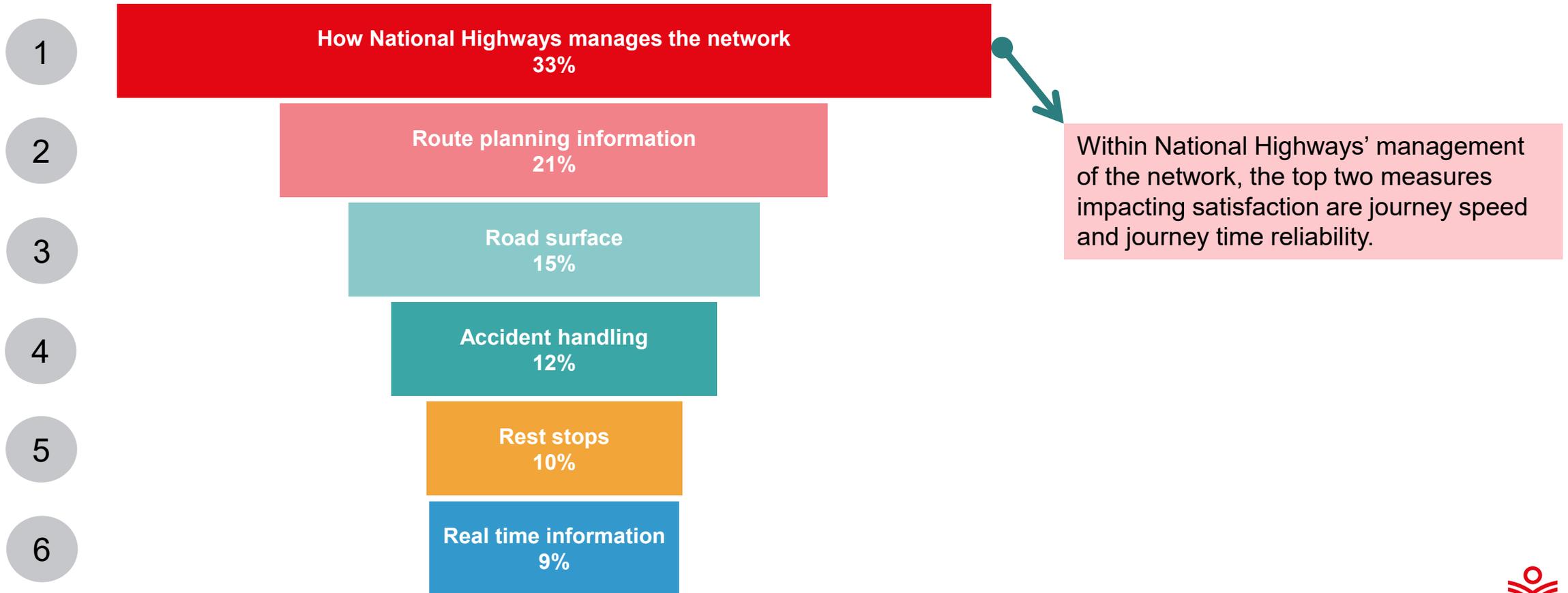
For **year 2024/2025**, when it came to meeting their business needs, we asked logistics and coach businesses how satisfied or dissatisfied they were with England's motorways and major 'A' roads. Below are the scores:



Overall satisfaction is % very/fairly satisfied. Dissatisfaction is % very/fairly dissatisfied. See detailed results in the Appendix. Base size: Year 20/21: 975; Year 21/22: 1318; Year 22/23: 1031; Year 23/24: 943; Year 24/25: 446. This year's results are based on survey waves 12 and 13 only. Wave 14 was excluded due to a sampling error that meant the data were non-comparable.

What key factors drive overall satisfaction?

Overall satisfaction with the strategic road network is the headline measure. A key driver analysis has been carried out to identify the elements that have had the greatest impact on the overall satisfaction rating. These are as follows:



Higher percentages indicate a greater contribution towards the overall satisfaction rating.

Base size: 446.

What do the results tell us?

Prior planning information

Help in planning routes was rated as 'good' by 39 per cent - the highest in this category. Ratings drop significantly for roadwork-related information, especially regarding diversion suitability (14 per cent rating it as 'good', 52 per cent 'poor').

Real-time information

This rated most positively for unexpected levels of congestion (40 per cent 'good') and accident and roadwork-related closures (38 per cent and 37 per cent respectively). Ratings were notably lower for weather-related closures (28 per cent) and post-roadwork reopening delays (21 per cent 'good', 43 per cent 'poor').

"Better communication and planning of roadworks and road closures."

Freight Manager

"Some sort of live notification system to ping businesses on major issues."

Freight Manager

What do the results tell us?

Better accident and incident handling

The time it usually takes to reopen roads was rated 'poor' by 48 per cent (vs 30 per cent 'good'). The suitability of diversionary routes, the consideration of driver hours and coach passenger welfare were all rated as 'poor' by over half of respondents.

Driver stopping places

The number of stopping places for drivers received the highest positive rating, though still only 19 per cent (vs 52 per cent 'poor'). For value for money, facility quality and vehicle security, nearly half of respondents rated these as 'very poor'.

Improved road surface quality

'Not damaging freight goods' was rated as 'poor' by 39 per cent of respondents. This increased to 49 per cent for 'not making coach passengers uncomfortable', and over half of respondents rated 'minimising wear and tear to vehicles or tyres' as 'poor'.

"Roads opening much more quickly after an incident. Clearer diversion signs [are needed]."

Coach Manager

"A huge increase in safe, cost-effective parking with full facilities for HGV drivers [is needed]."

Freight Manager

"Road surfaces need to level up to an acceptable level."

Freight Manager

What do the results tell us?

National Highways' day-to-day management of roads

Road safety received the highest satisfaction, with just over half rating it as 'good' and 15 per cent as 'poor'. Keeping roads open during bad weather was rated as 'good' by 43 per cent. Just under a third were satisfied with journey time reliability and speed, yet over a quarter rated these aspects as 'poor'.

National Highways' strategic management of roads

Balancing cost-effective roadworks whilst minimising traffic disruption was rated 'good' by 20 per cent (vs 44 per cent 'poor'). Nearly half selected 'neither good nor poor' when asked to rate National Highways in respect of 'understanding what your business needs from them' and 'the extent businesses like yours matter in their medium to long-term plans' (vs 43 per cent 'poor' in both instances).

"The duration a road is shut for due to an accident or incident is far too long when considering drivers...and passenger safety."

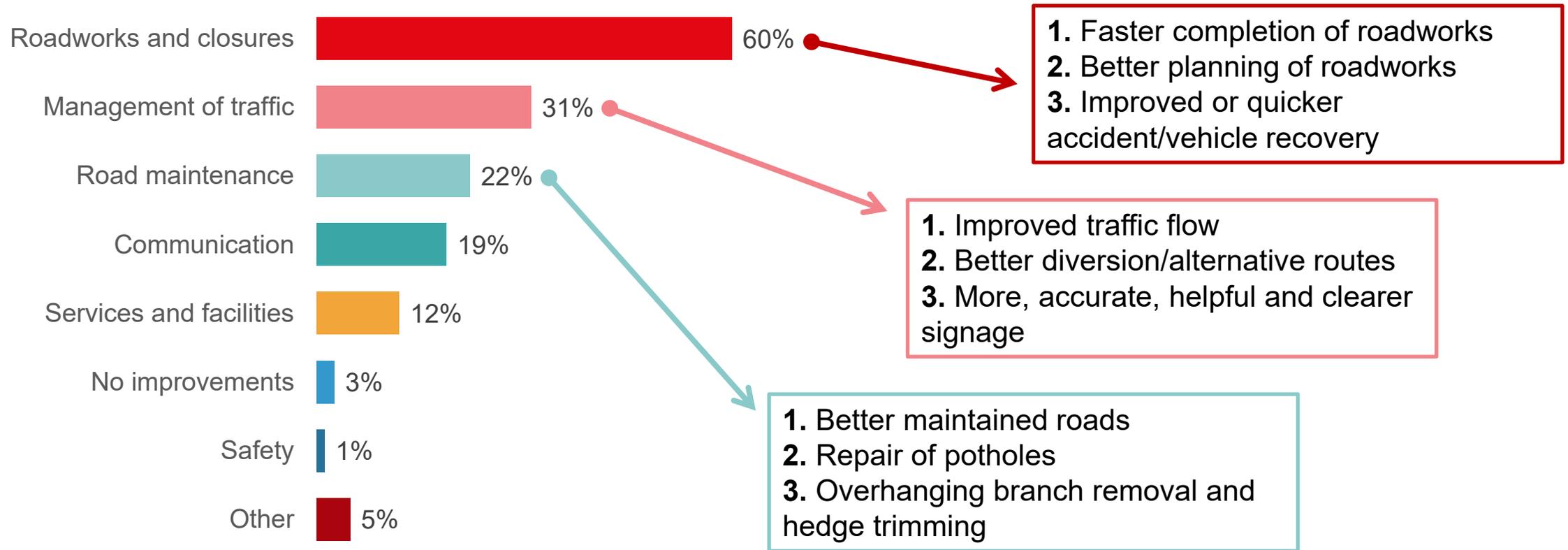
Coach Manager

"They [National Highways] need to improve on communication to companies about road closures and provide information in suitable HGV diversions."

Freight Manager

What improvements do vehicle managers need?

Vehicle managers were asked about improvements they would like to see implemented and the chart shows the main themes extracted from their comments:



Base size: 354 (people who commented).

Please note some comments contain multiple themes and the chart shows the percentage of people who mentioned something that fits into one of these themes.

National Highways - using the results to effect change

Logistics and coach businesses are vital users of England's motorways and major 'A' roads and key contributors to the government's core mission of maximising economic growth.

These results highlight that many vehicle managers are not satisfied with how well the Strategic Road Network meets their business needs. We're working closely with Transport Focus to develop priority areas of improvement, with our Customer Service Plan 2025-26 formalising our commitment to launch tangible initiatives aimed at boosting satisfaction among logistics and coach vehicle managers.

Key to this will be continuing to improve factors impacting all road users - such as road surface quality, incident handling, and information on diversions - alongside bespoke interventions to enhance regional and national engagement with both sectors.

During Road Investment Strategy 2, we've made substantial progress improving the accuracy and timeliness of planned overnight road closure information. We launched a dedicated road closure report page and daily email alert system, which provides timely notice to over 780 stakeholders who have signed up, with around 65% of those from the logistics and coach sector. Our road closure report page is currently the most popular page on our website, with over 218,000 views in August 2025 alone.

Since December 2023, jointly with industry, we've invested £26 million in improvements to lorry parking facilities through our Lorry Parking Facilities Improvement Fund. By March 2025, this investment delivered 323 additional parking spaces nationwide, directly responding to feedback about the need for safe, secure rest areas.

We've also established both the National Highways Freight Forum and Bus and Coach Forum, which brings together major operators and sector bodies, to understand issues and identify opportunities to improve satisfaction. These initiatives reflect our ongoing commitment to supporting the transport sector, ensuring professional drivers have access to facilities that make their journeys safer, more efficient, and more comfortable.

Freda Rashdi, Head of Customer Journeys

National Highways

How we did it

As part of our remit to transport users, Transport Focus wanted to gather the experience of those using National Highways' roads who manage vehicles over 3.5 tonnes.

The survey first began in April 2020 and has since been carried out three times a year with fieldwork from May to June, October to November and February to March (although the first year was an exception due to Covid).

In the sample, 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.

We selected these managers by using the Traffic Commissioner's 'O' licence database according to the proportion of the size of their fleet.

To be included, the majority of a vehicle manager's vehicles must use the National Highways' roads at least once a week. We invite them to complete a questionnaire by letter and then send two subsequent

reminders if necessary.

The results in this 2024-25 report are from two survey waves - 12 and 13.

Unfortunately, a sampling error in Wave 14 meant the incorrect people were mailed the questionnaire. Wave 14 is therefore not directly comparable with other waves and not included in this year's results.

Therefore, the overall number of responses was 470 with 416 from freight* and 54 from coach vehicle managers.

*The freight results are weighted to the goods laden mileage proportions within the Department for Transport's Road Freight Survey (see table RFS0117 in that survey).

Appendix: detailed results



Overall satisfaction

Overall satisfaction



Total: very/fairly satisfied

36%

Overall satisfaction - freight only



36%

Overall satisfaction - coach only *



42%*

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

Base size: Combined: 446; Freight: 396; Coach: 50. Includes Wave 12 and 13 only, Wave 14 excluded.

*caution – based on 50-99 responses.

Availability of advance planning information to...

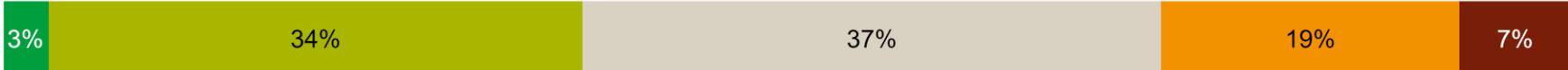
Help you plan routes



Total: very/fairly good

39%

Estimate journey times



37%

Know when roadworks will close roads completely



27%

Estimate extra journey time roadworks will add



20%

Know how suitable diversionary routes will be for vehicles



14%

Very good Fairly good Neither good nor poor Fairly poor Very poor

Base sizes: Help you plan routes: 383; Estimate journey times: 381; Know when roadworks will close roads completely: 383; Estimate extra journey time roadworks will add: 382; Know how suitable diversionary routes will be for vehicles: 377. Includes Wave 12 and 13 only, Wave 14 excluded.



Real-time information on...

Unexpected levels of congestion



Total: very/fairly good

40%

Road or lane closures due to roadworks



37%

Road or lane closures due to accidents



38%

Road closures due to bad weather



28%

Roads not opening on time after roadworks



21%

Very good Fairly good Neither good nor poor Fairly poor Very poor

Base sizes: Unexpected levels of congestion: 455; Road or lane closures due to roadworks: 459; Road or lane closures due to accidents: 457; Road closures due to bad weather: 450; Roads not opening on time after roadworks: 452. Includes Wave 12 and 13 only, Wave 14 excluded.

Accident and incident handling

Time it usually takes to re-open roads



Extent drivers' working hours are considered



Extent type of goods being carried is considered *(freight only)*



Extent passengers' welfare is considered *(coach only)*



Being kept informed of likely length of delay



Suitability of diversionary routes for vehicles



Total: very/fairly good

30%

13%

13%

12%*

13%

15%

Very good Fairly good Neither good nor poor Fairly poor Very poor

Base sizes: Time it usually takes to re-open roads: 454; Extent drivers' working hours are considered: 451; Extent type of goods being carried is considered: 371; Extent passengers' welfare is considered: 54; Being kept informed of likely length of delay: 455; Suitability of diversionary routes for vehicles: 451.

Includes Wave 12 and 13 only, Wave 14 excluded. *caution – based on 50-99 responses.

Stopping places

How many stopping places there are



Total: very/fairly good

19%

Availability of spaces for vehicles



13%

Quality of facilities for drivers



11%

Security of vehicles when parked



10%

Their value for money



8%

Very good Fairly good Neither good nor poor Fairly poor Very poor

Base sizes: How many stopping places there are: 453; Availability of spaces for vehicles: 452; Quality of facilities for drivers: 452; Security of vehicles when parked: 446; Their value for money: 443. Includes Wave 12 and 13 only, Wave 14 excluded.

Road surface

Minimising wear and tear to vehicles or tyres



Total: very/fairly good

16%

Not damaging goods *(freight only)*



23%

Not making passengers uncomfortable ^{*}*(coach only)*



17%^{*}

Fairly good Neither good nor poor Fairly poor Very poor

Base sizes: Minimising wear and tear to vehicles or tyres: 454; Not damaging goods: 396; Not making passengers uncomfortable: 52. Includes Wave 12 and 13 only, Wave 14 excluded.

*caution – based on 50-99 responses

National Highways' day-to-day management of roads

Making journey times as reliable as possible



Total: very/fairly good

31%

Making journey times as fast as possible



26%

Road safety



53%

Keeping roads open during bad weather



43%

Very good Fairly good Neither good nor poor Fairly poor Very poor

Base sizes: Making journey times as reliable as possible: 454; Making journey times as fast as possible: 451; Road safety: 457; Keeping roads open during bad weather: 451. Includes Wave 12 and 13 only, Wave 14 excluded.

National Highways' strategic management of roads

Balancing doing roadworks cost effectively with need to minimise disruption to traffic

Total: very/fairly good



20%

Understanding what your business needs from them



11%

Extent businesses like yours matter in their medium to long-term plans

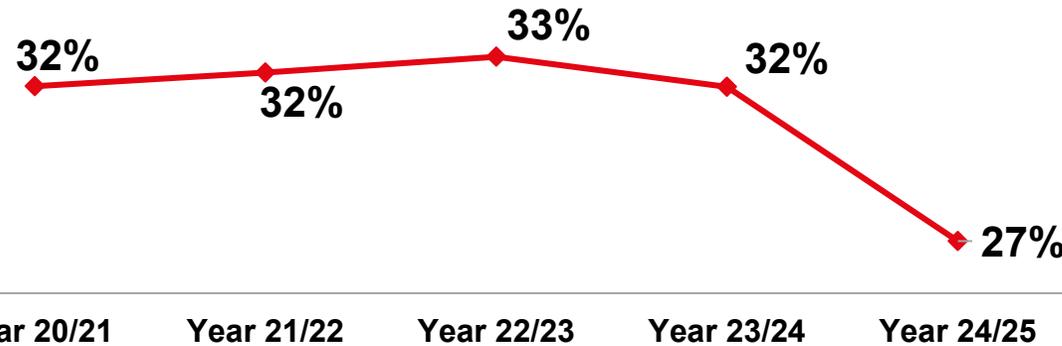


12%

Very good Fairly good Neither good nor poor Fairly poor Very poor

Headline scores: 5-year trends (very/fairly good)

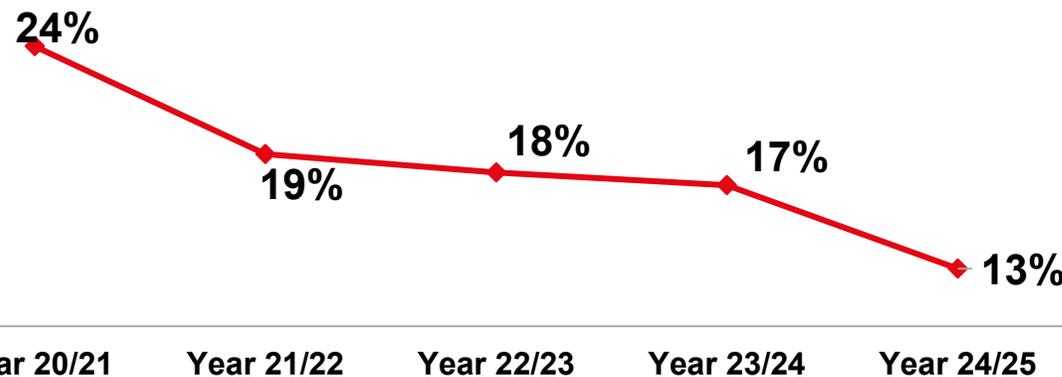
Advance planning: know when roadworks will close roads completely



Over the five-years of the survey, the **all good** score increased to 33 per cent in Year 22/23 before progressively coming back down and scoring 27 per cent in Year 24/25.



Stopping places: availability of spaces for vehicles



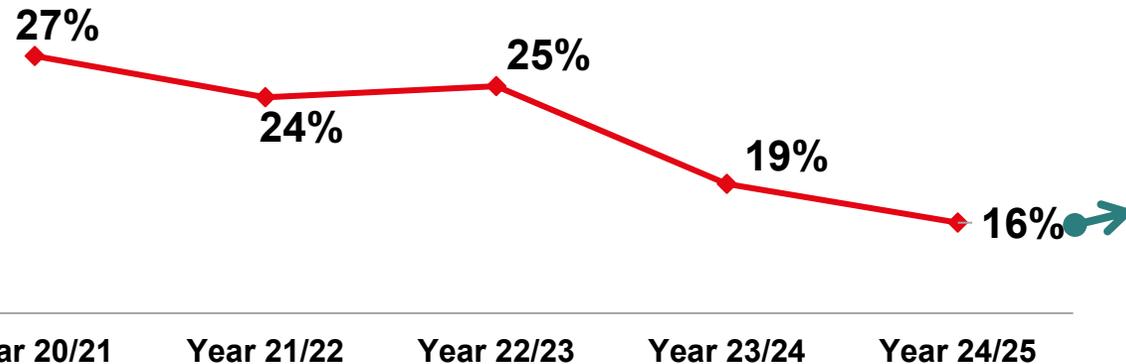
Over the five-years of the survey, there is a **downward trend** with **all good** scores from 24 per cent in Year 20/21 to the current score of 13 per cent.



Base - close roads: Year 20/21: 789. Year 21/22: 1130. Year 22/23: 936. Year 23/24: 842. Year 24/25: 383 (includes Wave 12 and 13 only, Wave 14 excluded). Base - spaces for vehicles: Year 20/21: 962. Year 21/22: 1313. Year 22/23: 1031. Year 23/24: 942. Year 24/25: 452 (includes Wave 12 and 13 only, Wave 14 excluded).

Headline scores: 5-year trends (very/fairly good)

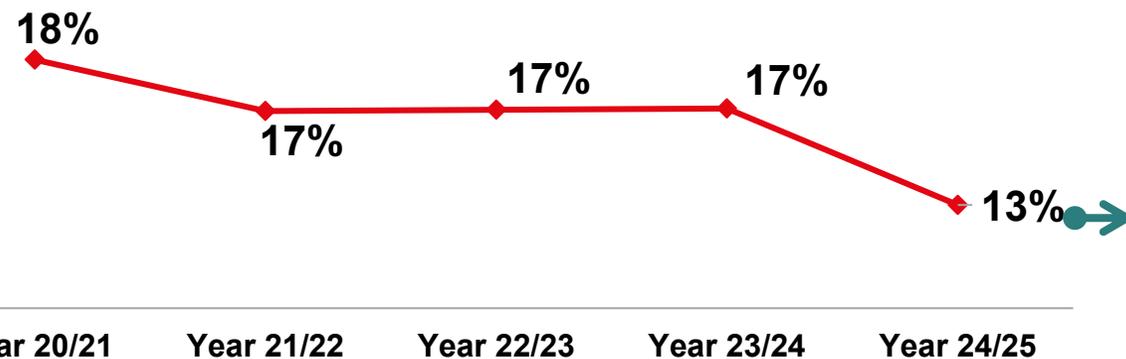
Road surface: minimising wear and tear to vehicles



Over the five-years of the survey, there is a **downward trend** with **all good** scores from 27 per cent in Year 20/21 to the current score of 16 per cent.



Accidents and incidents: being kept informed of likely length of delay



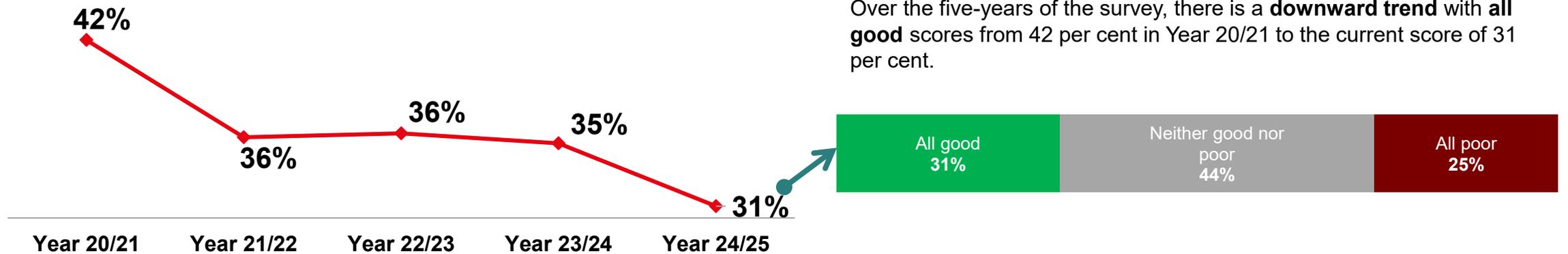
Over the five-years of the survey, there is a **downward trend** with **all good** scores from 18 per cent in Year 20/21 to the current score of 13 per cent.



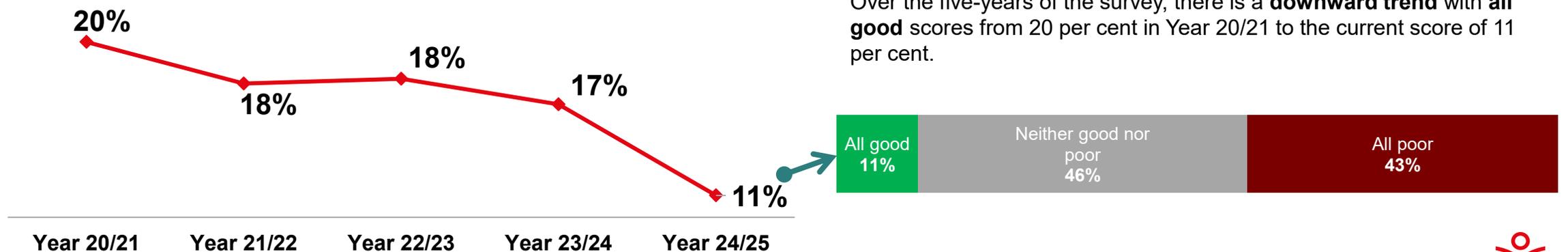
Base - wear and tear: Year 20/21: 983; Year 21/22: 1332; Year 22/23: 1052; Year 23/24: 953; Year 24/25: 454 (includes Wave 12 and 13 only, Wave 14 excluded). Base - length of delay: Year 20/21: 973; Year 21/22: 1325; Year 22/23: 1046; Year 23/24: 947; Year 24/25: 455 (includes Wave 12 and 13 only, Wave 14 excluded).

Headline scores: 5-year trends (very/fairly good)

National Highways: making journey times as reliable as possible



National Highways: understanding what your business needs from them



Base - journey times: Year 20/21: 962; Year 21/22: 1307; Year 22/23: 1030; Year 23/24: 950; Year 24/25: 454 (includes Wave 12 and 13 only, Wave 14 excluded). Base - business needs: Year 20/21: 938; Year 21/22: 1285; Year 22/23: 1011; Year 23/24: 928; Year 24/25: 447 (includes Wave 12 and 13 only, Wave 14 excluded).

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Transport Focus is the operating name of the
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