Department for Transport

GSR GOVERNMENT SOCIAL RESEARCH
Social Science in Government

Roads Reform
Social Research Programme

Summary of Main Findings

December 2014, DfT Social and Behavioural Research

Introduction to this document

This document is a **synthesis of key findings** from a large-scale qualitative and quantitative social research programme, commissioned by the Department for Transport to support policy development relating to the Strategic Road Network (SRN).

10 reports containing full findings from the research have been published alongside this synthesis report

The research programme aimed to understand:

- Awareness and understanding of the SRN
- How the SRN is used and by whom
- User expectations of and needs from the SRN
- Attitudes towards investment in the SRN
- Priorities for investment in the SRN
- Drivers of road user satisfaction
- Attitudes towards and needs during congestion
- Link between the SRN and economic growth
- Communication needs and preferences

Survey findings are referenced throughout this document

Qualitative research findings are denoted by the image above

The Roads Reform Social Research Programme: Eight studies undertaken over 18 months

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Mixed Methods

Qualitative Discussions

1) Perceptions and use of the SRN (June 2013)
2) Understanding road user satisfaction (Sept 2013)

Quantitative Surveys

- 4 x individual road users (Feb - April, June & Sept 2013; Sept 2014)
- 2 x commercial road users (June & Sept 2013)

Two Audiences

Individual road users

- Residents of England
- Travel by road as a driver / passenger when conducting personal business (e.g. leisure trips, commute, shopping)
- Users and non-users of the SRN

Commercial road users

- Representatives of organisations in England that travel by road for business
- Key financial decision-makers with some responsibility for travel decisions
- Drivers and non-drivers

Additional technical information is available in the Appendix to this document and in the published reports

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Placing the road user perspective at the heart of policy decision-making

Social research findings have been used to:

- Guide **important policy decisions** relating to roads reform
- Inform the **content of key publications**, including the Action for Roads Command Paper and the Roads Investment Strategy
- Shape the **strategic vision** for the SRN
- Develop appropriate **performance metrics** for the Company
- Help determine the **investment priorities** for Road Period 1
- Support the Department's Strategic Outline Business Case
- Provide **a solid evidence base** upon which to draw when designing future road user satisfaction research.

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HIGHWAYS AGENCY

Passengerfocus
putting passengers first

DfT has shared outputs from the research with the Highways Agency and Passenger Focus.

Findings informed subsequent discussions amongst the three organisations about how to ensure **road user needs and views play a central role in future decisions about the SRN**.

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Key findings

The road network plays a critical role in daily life

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Travel on all roads

	Individuals[1]	Commercial road users[2]
at least twice per week	90%	84%

Travel on SRN

	Individuals[1]	Commercial road users[2]
at least once per year	95%	86%
at least once per month	80%	77%
at least twice per week	47%	51%

64%

of individuals travelling on the SRN at least once a month agree it would be **difficult or impossible** to do their most usual journey in another way[3]

47%

of commercial road users think it is important to know about developments with the SRN when **planning for business**[4]

Source: [1] ONS Opinions and Lifestyle Survey Feb – April 2013 (Base: All 1856) MDN_Strat | [2] BDRC CATI Omnibus, 3rd – 13th June and 2nd – 12th September 2013. (Base: Road Users 638). Q8 and Q9
[3] TNS Omnibus 10-16 Sept 2014 (Base: 3448) Q8 | [4] BDRC CATI Omnibus, 3rd – 13th June 2013. (Base: Business road users 261) Q12.

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Road users focus on the journey, not the road

Road users think of their journey holistically and not in terms of the individual roads that constitute it

Strategic roads usually form one part of the journey. Experience of the SRN can influence perceptions of the entire journey and vice versa

Road users have difficulty identifying which ‘A’ roads are and aren’t part of the SRN

People do not have a good grasp of what the SRN is or when they are travelling on it

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Road users don't intuitively see the big picture

Roads are predominantly regarded in personal terms: role in my life / my business

Personal considerations outweigh national / economic concerns when evaluating the road network and considering how it can be improved

Economic and financial matters are largely considered in personal terms: impact on my finances / my business

'The economy' lacks personal salience for most

The concept of 'economic growth' is not well understood by either private or commercial road users

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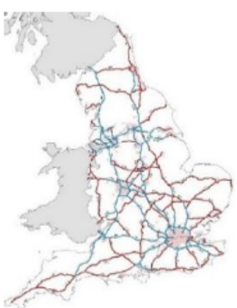
Once the concept of the SRN is understood, road users recognise its importance to the economy

93%

agree the SRN is important to England's economy[1]

3 in 5

think it is important to invest in the SRN for economic reasons[2]



The breadth of the SRN helps convey its importance to British businesses

(e.g. role in moving goods; connecting people and places)

Roads are perceived to **facilitate other key drivers of growth**

(e.g. by opening up access to jobs, facilitating goods movement, enhancing UK's appeal to investors/tourists)

Source: [1] TNS Omnibus 10-16 Sept 2014 (Base: 3448) Q5 | [2] BDRC CATI Omnibus, 3rd – 13th June 2013. (Base: Road users 315) Q13 / TNS face-to-face omnibus, 5th –11th June 2013. (Base: All Respondents 3,512) Q8.

Having well maintained and functioning strategic roads is considered paramount to road users

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Levels of SRN investment[1]

59% **more** investment in the SRN is needed

33% current levels are **sufficient**

Roads users expect investment in strategic roads to be prioritised over other roads due to their strategic importance, high speed and high traffic volumes

Consequently, strategic roads are generally thought to be in good condition when compared to other roads

Top 3 reasons for investment in SRN[1]

1. To improve safety standards
2. To support economic growth
3. To make sure the network can cope with increased demand due to population growth

Road users desire improvements to the way the SRN and roads in general are planned and managed, particularly with regard to the efficiency and co-ordination of road works

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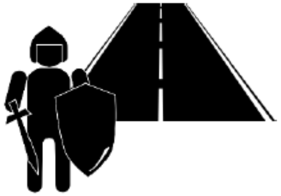
Minimising the impact and inconvenience of disruption, including congestion, is desirable

Everyday congestion is **expected and accepted:** it's part of the British driving experience

Severe and unpredictable congestion (e.g. bad weather, accidents) is rarely encountered

Road users plan their journeys defensively



They have developed coping mechanisms to minimise the impact of congestion and other disruption (e.g. build in buffer time, avoid known hotpots)

For business users, the cost of congestion is four-fold:

Productivity: delays on the road increase travel time or 'dead time'

Efficiency: stop-start driving is less fuel efficient and more costly

Opportunity: delays can result in late or missed appointments

Customers: late delivery of goods or services threatens relationships

When planning road works and dealing with disruption road users want the road operator to:

Set realistic expectations: inform about what to expect, timescales, alternative routes

Manage expectations: provide progress updates, allow users to re-set expectations

Meet expectations: deliver on promises; highlight the benefits resulting from the work and associated disruption → increase trust

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Road users evaluate their overall journey, not the attributes of the roads they use

Roads need to be good enough to:

Get road users from A to B as efficiently as possible

Allow road users to feel in control of their journey

Ensure journey experience matches journey expectations

A direct route, with free-flowing traffic and minimal obstacles (e.g. junctions, bottlenecks)

Complete the journey in the time allocated

Have a stress-free, safe and easy experience

Consistency of service across the entire journey is critical to a delivering a positive experience

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Road user satisfaction involves **meeting** and **managing** road users' **expectations**

Expectations are subjective and based on:

Prior knowledge and **experience** of road travel / using the specific route

Preconceived expectations of the overall journey

Personal characteristics (e.g. confidence on the road, route familiarity)

Expectations are met → Road user feels **in control** → Satisfied

(The converse is also true)

Being 'in control' is a neutral state. Only sensitive when control is threatened or lost

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Road users seek to retain control of the driving experience and journey outcomes

Driving Experience

Absence of threat or danger

Absence of stress and frustration

Absence of mental effort

I am in control of how I travel

I feel safe, at ease and comfortable

Journey Outcomes

Journey time is as expected (predictable & reliable)

I arrive within the time I allocate for the journey

Journey costs are minimised

Direct and indirect costs do not exceed what I have allowed for

 

Of primary importance to individuals and commercial road users who travel by road as part of their role

Critically important to commercial road users; key evaluation criteria used by employees responsible for decisions about company vehicle use / travel in their organisation

Relative importance varies between individual and commercial road users and by trip purpose

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A range of impacts determine the driving experience and journey outcomes

Visibility
I can see where I am going / have good spatial awareness

Decision-making
I can make the few decisions I need to quickly and easily

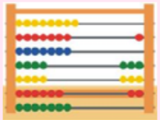
Personal space
I don't feel hemmed in and can manoeuvre the road freely

Driving Experience

Absence of threat or danger

Absence of stress and frustration

Absence of mental effort



Hard costs
(e.g. fuel costs, vehicle wear and tear)

Time lost / wasted

Missed opportunities
(e.g. appointments, relationships)

Physical and emotional toll on the driver

Journey Outcomes

Journey time is as expected
(predictable & reliable)

Journey costs are minimised

A negative occurrence is more keenly felt than a positive experience

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Five types of mediating factors can facilitate or undermine delivery of expectations

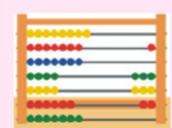
Road structure	Ancillary features	Upkeep	Unexpected disruption	Other road users
• Capacity • Junctions • 'Safe spaces'	• Lighting • Signage • Road markings	• Surface quality • Ancillary features in good order	• Road works • Incidents • Weather	• Driver behaviour • Vehicle type

Visibility

Decision-making

Personal space

Driving Experience



Hard costs

Time lost / wasted

Missed opportunities

Physical and emotional toll

Journey Outcomes

Structural factors have the greatest influence on the success of the journey / satisfaction

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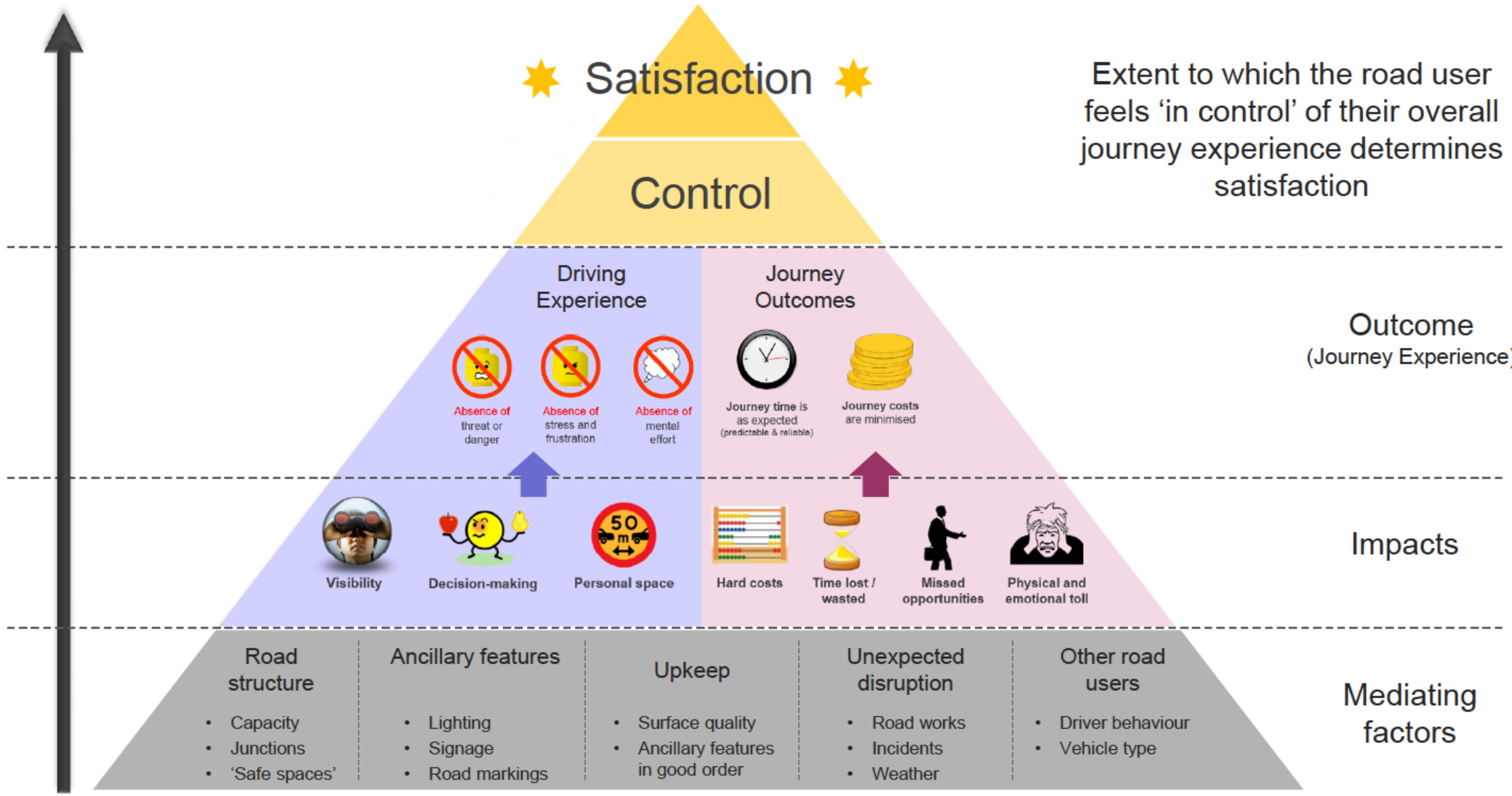
Satisfaction is driven by experience which is underpinned by road / Network performance



Road users evaluate the extent to which the overall journey occurred as expected

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Appendix: Technical Details

Full details of questionnaires, samples and methodologies used are available in the technical reports produced for each study

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TNS-BMRB Qualitative studies

Two waves of qualitative discussions

1. Perceptions and use of the SRN
   - 20th May – 14th June 2013
   - 14 x 2 hour discussion groups in seven locations across England with individual road users
   - 32 x 1 hour face to face interviews in 10 locations across England with commercial road users

2. Understanding user satisfaction
   - 30th October – 5th December 2013
   - 14 x 2 hour discussion groups with individual road users
   - 8 x 1 hour face to face interviews with commercial road users (new respondents)
   - 15 x 45 minute interviews with commercial road users (reconvened from wave 1)

Samples drawn from the Highways Agency's 7 regions

Full details of the samples and methodologies used in each study are available in the main reports

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ONS Opinions and Lifestyle Survey

The Department for Transport (DfT) commissioned the Official for National Statistics (ONS) to conduct research about users of the English Strategic Road Network (SRN) by placing questions on its monthly Opinions and Lifestyle omnibus survey (OPN) as follows:

- Questions were asked on three consecutive waves of the OPN in February, March and April 2013. The results from these three surveys were combined.
- The OPN uses a two-stage random probability stratified sample. The sampling frame used is the Royal Mail Postcode Address File (PAF), which includes the address details for approximately 27 million private households receiving fewer than 50 items of post per day in the UK. The PAF is updated every three months.
- This PAF sampling frame is stratified by region, household car ownership, National Statistics Socio-economic Classification (NS-SEC) and the age of the household reference person.
- The primary sampling units (postcode sectors) are selected with a probability that is proportional to size on an annual basis, but the sample is designed so that the monthly sample of 67 sectors is nationally representative.
- Within each sector, 30 households are selected at random. The survey aims to achieve response rates of 60%.
- Over the three waves of the module (February, March and April 2013), 2,114 GB-resident individuals were surveyed, including 1,856 individuals residing in England.

BDRC Business Opinion Omnibus

DfT commissioned BDRC Continental to conduct two waves of research amongst commercial organisations in England via their monthly Business Opinion Omnibus survey, a telephone-based survey, structured as follows:

- Each month 500 interviews are undertaken with small, medium and large businesses across the UK, 450 of which are with SMEs (defined as those with up to 250 employees).
- Individual respondents are the main financial decision-maker within the business. In smaller businesses this is usually the owner, in larger ones the Financial Director or Controller.
- Each wave is conducted using fresh sample, which is structured by size, sector and region. The profile is maintained each wave, enabling reliable, month-on-month data comparisons.
- Data is weighted to be representative of all businesses in the UK with a turnover of £50,000+, based on the business population data from the Government's Department for Business, Innovation and Skills (BIS).
- DfT commissioned two waves of research with businesses based in England. 427 interviews were carried out in wave 1 which ran from 3rd to 13th June 2013; a further 422 interviews were carried out in wave two from 2nd to 12th September 2013.
- Although the Business Opinion Omnibus is designed to be representative, findings in this study are reported and should be treated as representative of the samples surveyed in June and September 2013 rather than of the business population in general.

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TNS Omnibus

DfT commissioned TNS UK to conduct three waves of research amongst individuals residing in England via their monthly Omnibus survey, a face-to-face household survey structured as follows:

- The TNS Omnibus runs twice a week with a sample of c.1,700 respondents. For the DfT studies, two consecutive tranches of fieldwork were combined to create one 'wave' of research with c.3,400 respondents.
- DfT commissioned three 'waves' of research: 1) June 2013 (3,512 respondents), 2) September 2013 (3,492 respondents) and 3) September 2014 (3,448 respondents).
- The TNS Omnibus is a quota-based survey that users random location sampling.
  - Census small area statistics and the Postcode Address File (PAF) are used to define sampling points – areas of similar population sizes formed by the combination of wards.
  - Interviewers' choice when selecting respondents is limited. Respondents in each assignment are drawn from a small set of homogenous streets. Addresses are issued to achieve an adult sample of between 13 and 18 interviews in provincial areas and 12 and 15 in London. Assignments are conducted over two days of fieldwork.
  - Quotas are set for characteristics known to have a bearing on individuals' likelihood of being at home and so available for interview. This minimizes any bias introduced as a result of interviewers focusing on groups that are more likely to be at home.
- Survey data was weighted to make it representative of the English adult population in terms of key demographic characteristics: gender, age group, working status, region of residence and social grade. However, findings in this study should be treated as indicative of national sentiment.