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Report





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Introduction

1 Introduction

1.1 Background

Expressways are an upgrade for Highways England's busiest A roads, designed to be as well-designed as motorways and providing a higher quality journey and experience than the existing All Purpose Trunk Roads (APTR) they will replace. Expressways are set out in the Department for Transport's Road Investment Strategy (2015-2020) and Highways England's Strategic Business Plan (2015-2020) and Delivery Plan (2015-2020), and mark 'the biggest change to [Highways England's] network since the introduction of motorways'. By 2040, Highways England wants to have transformed the most important A roads on the Strategic Road Network into Expressways.

Driven by the RIS objective to achieve a motorway standard of performance, many of the key principles of the Expressways concept have been settled upon already. With enhanced design, safety and technology features, Expressways are designed to make the customer experience as positive and safe as possible, offering the same standard of journey to customers as motorways at the national speed limit (70mph). Expressways will use technology to manage traffic and provide better information to drivers, with all junctions designed to be motorway-style grade-separated, to allow easier entry and exit from the Expressway. They will include safety features such as emergency refuge areas (ERAs) to protect customers using the Strategic Road Network (SRN), where there is currently no hard shoulder.

As one of its flagship developments, Highways England is keen to ensure that the concept is well understood and well received by the millions of customers who will use the roads once they are built. With Highways England's commitment to customer satisfaction as one of its three imperatives, and with the ongoing challenge of meeting its target of 90% overall satisfaction from the National Road Users Satisfaction Survey (NRUSS), Ipsos MORI was commissioned to undertake a programme of research designed to ensure that customers' views are placed firmly at the heart of the new road concept.

There are other reasons that this research is so timely. Separate research conducted by Ipsos MORI suggests that customers have relatively low awareness of Smart Motorways – close to half (47%) of SRN users surveyed in August 2016 said they had never heard of the term Smart Motorways. While these figures increased when participants were probed on awareness of the technology deployed on Smart Motorways, namely temporary variable speed limits and all-lane running (both 73%), nonetheless this has clear implications for road safety and driver behaviour. Indeed, research conducted by Ipsos MORI for Highways England's Customer Panel found that Panellists are less confident driving on Smart Motorways than they are on normal motorways or other types of A road which form the Strategic Road Network.

As a new road concept, it is vital that research is undertaken with members of the public to test the concept and to help anticipate questions or issues they might have, and to know how this differs between groups of SRN user.

1.2 Objectives

Highways England set out some key objectives to meet as part of this programme of research. Firstly, Highways England wanted to ensure that it captured views of a wide range of users and stakeholders about the Expressway concept. As well as gauging public perceptions on a large-scale, representative way, it was particularly important to understand views of more frequent road users such as HGV drivers, and stakeholders such as representatives from relevant membership organisations.

Secondly, Highways England identified a number of issues and concepts to explore and test as part of the programme:

- Gauging customer views of existing road types, and reasons they have for using (or not using) motorways, dual carriageway or single carriageway A roads
- Understanding which road features customers most value in terms of safety, comfort, driver behaviour, reliability and a range of other factors
- Testing the different features and characteristics of Expressways to see how the concept will be understood and received by customers once rolled out, and how they would prioritise these features personally
- Understanding how the concept will land with members of the public - do they see an Expressway as a separate 'category' of road, and what does this mean for their expectations about how to drive on one?
- Helping Highways England to understand preferences for communicating the new concept, and anticipating potential issues or concerns people might have

1.3 Methodology

This report has been prepared following a varied programme of qualitative and quantitative research. This incorporated:

- Three focus groups in Bath, Nottingham and Warrington
- An online quantitative survey with 2,005 adults aged 18+ representative of the UK population. Non-SRN users did not take part in the survey
- Four face-to-face depth interviews with HGV drivers and four interviews with a range of stakeholders (contacts provided by Highways England)

A full summary of the methodology for this study is included at the end of the report.

Summary of key findings/ recommendations

2 Summary

This section summarises the key insights which have emerged from the research.

Road users and stakeholders are generally favourable towards the Expressways

Two-thirds (66%) stated they were supportive, mainly because they could see how they would improve traffic flow and reduce journey time. This is important because 'traffic levels and congestion' was the single biggest area of dissatisfaction with the current road network, with around half (49%) of users unhappy with the level.

Both users and other stakeholders are keen to understand more about the new network, specifically whether there will be new or upgraded roads, where these will be located and what the 'rules of the road' will be.

Expressways are expected to be safer for non-motorised users, whilst also improving journey reliability

Two-thirds (64%) of SRN users believe that Expressways will be safer for cyclists and pedestrians by providing alternative provision. Three in five (60%) also think that journey reliability will be improved.

Importantly, around half (51%) of users believe Expressways will help to promote the economic growth of towns situated away from the network, although it should be recognised that a sizeable minority (42%) are not in agreement that this benefit will be realised. The qualitative findings indicate the uncertainty as to the location of the new/upgraded roads, and therefore respondents found it difficult to visualise them and have an opinion on their benefit to local towns and villages.

Clear consensus that Expressways name is important to differentiate them from A-roads and motorways

Around two-thirds (65%) felt that the new Expressways network should be called 'Expressways' to differentiate them from other types of road.

There was less of a consensus, however, as to whether the roads were more like motorways (34% felt they were) or A-roads (31% felt they were). Opinion tends to be driven by what features users associate with A-roads and motorways. For example, two lane carriageways meant the public liken Expressways to A-roads, whereas technological features, such as electronic signs and CCTV are more associated with experience of driving on motorways.

There is a clear hierarchy when it comes to prioritising Expressway features

When it comes to the key features of Expressways there is a clear prioritisation hierarchy:

1. **Flow** – features which are integral to making the concept work, such as excluding slow moving vehicles, pedestrians and cyclists, dual carriageway throughout and prohibiting right turns across the carriageway, are the priority for road users;
2. **Safety** – users understand the importance of safety and features which contributed to it, such as exclusion of non-road users, warning signs, emergency refuge areas and concrete barriers were considered a high priority;

3. **Technology** – understanding and appreciation of the role of technology in SRN management was mixed, and awareness of its role is by no means universal. Those with experience of smart motorways tended to understand the importance of technology in aiding flow and safety;
4. **Design** – softer, design factors, such as gateways, road service areas and aesthetics were considered less of a priority.

Contradictory evidence as to whether Expressways should have their own branding which distinguishes them from A-road and motorways

Results of the quantitative survey show that Expressways needs some sort of differentiation to existing roads, but ultimately are not seen as something new. A third of users (31%) think the roads are more like A-roads (but should be called Expressways to differentiate them), whilst a similar proportion (34%) think they are more like motorways (but should be called Expressways to differentiate them).

The quantitative survey also shows that over two-thirds (69%) agreed that Expressways should have their own colour signs, which reflects the view that a new designation of road (called Expressways) should be created.

However, insights from the focus groups suggest that Expressways only require differentiation if they are going to be 'something new' (i.e. have new 'rules' which fundamentally differentiate them from motorways or A-roads). The quantitative survey shows that only one in ten (9%) see them as 'something different altogether'. There is therefore no clear consensus as to whether they are 'something new', are going to have 'new rules', and therefore require new signage which distinguishes them accordingly.

Environmental aesthetics of Expressways are not as important as guaranteeing flow...users tend to see pollution as the most pressing environmental issue (if at all)

Generally, road users do not pay attention to the aesthetic design of a road when travelling on it, and an environmentally friendly design was lower down the list of priority features for the majority. In general, users see this feature as a 'nice to have', whilst pollution and improving air quality was more understood by the public and considered more of an acute issue when it came to environmental considerations.

Categorisation

Segmentation of roads users according to view on Expressways

3 Categorisation

3.1 Relevance of a segmentation

A statistical segmentation was carried out. Respondents were grouped together based on which features of Expressways (Q10) they found most important in the quantitative survey. As a result, five homogenous segments of SRN users were grouped together because they shared attitudes in prioritising certain Expressway features.

3.2 Categorisation of SRN users

The table below summarises the five segments and the key demographic profiles of each. Each segment then has their own 'pen portrait', which summarises the attitudes of a SRN user within that segment. The table also presents the differences in the quantitative data which has informed the pen portrait summaries.

Table 7.1 – Segmentation of SRN users as to their priorities for Expressways

Segment	Key demographics	Pen Portrait	Differences in data
Get Me There	<ul style="list-style-type: none"> Significantly more likely to be over the age of 45 More likely to be male More likely to be retired More likely to be middle class (ABC1 social grades) 	As a regular user of the SRN (at least once a week), my number one priority is to get to my destination as quickly as possible. I would describe myself as very confident when driving on motorways and therefore dislike anything which gets in my way, such as slow moving vehicles which pull out slowly from a side road, particularly cyclists and pedestrians, who I think should therefore be excluded from using Expressways – it will be safer for them as well! I have heard of Expressways and think they are a great idea, mainly because I think they will help ease congestion, improve the traffic flow and therefore reduce my journey time – much like motorways do. I'm not that bothered about new road signs though, I know how to drive on a fast motorway anyway!	<ul style="list-style-type: none"> Two-thirds (64%) describe themselves as 'very confident' when driving on a motorway, whilst 69% say they are 'very confident' driving on A roads Over half (56%) are dissatisfied with current levels of traffic congestion Half (49%) have heard of the term Expressway 61% think that Expressway is a suitable term for this type of road Three-quarters (74%) are favourable towards the concept 70% believe Expressways will improve the reliability of journeys I make using this type of road Over seven in ten (72%) believe Expressways will be safer for cyclists and pedestrians by using alternative provisions (e.g. bridges or underpasses) 38% think they are motorways but should be called Expressways to differentiate them

			<ul style="list-style-type: none"> • A third (32%) do not think it's important that Expressways should have their own signs
No Strong Views	<ul style="list-style-type: none"> • More likely to be aged 35-44 	I wouldn't use the SRN if I didn't have to, but sadly I have to get to work, so it's just a necessity for me really. To be honest, I'm not really confident when driving on motorways, so probably wouldn't if I didn't have to. I'm not really bothered about Expressways – what features they have, what you call them – I'm not even sure they're needed are they? They're no different than what we've got. Tell me a bit more about them and I might be persuaded one way or another! To me, they're not different to other roads are they?	<ul style="list-style-type: none"> • One in five (19%) have not driven on the SRN • 43% travel as part of their daily commute • One in five (20%) not confident when driving on motorways • One in three (32%) are ambivalent towards calling them 'Expressways', whilst the same proportion are neither supportive nor against them • A quarter (23%) think these roads are fundamentally just like existing A roads and should not be called anything different
Tell Me More	<ul style="list-style-type: none"> • More likely to be aged 65 and over • More likely to be retired 	I like these new roads that have all the techy stuff – the overhead speed signs which change depending on traffic congestion and CCTV which means incidents get clear quicker. I therefore like the Expressways concepts because of this – anything which helps traffic flow smoother right?	<ul style="list-style-type: none"> • Over half (54%) are dissatisfied with the condition of the roads • Three-quarters (74%) are favourable towards Expressways
Keep Me Safe	<ul style="list-style-type: none"> • More likely to be young drivers, aged 18-24 • More likely to be female 	Overall, I'm fairly satisfied with the quality, traffic levels and congestion on the roads. I also think on the whole that they are safe to drive on. I haven't heard the term Expressway before but from what I've heard I'm broadly favourable towards them. They sound safe to drive on, like motorways really – nice, long junctions, signs which give plenty of warning of junctions and safe stopping areas if I do get into trouble.	<ul style="list-style-type: none"> • Three in ten (30%) are satisfied with traffic levels and congestion • Three in five (59%) are satisfied with safety on the roads • Two-thirds (66%) are satisfied as to the provision of information during journeys • Nearly a third (31%) satisfied with the level of traffic pollution on the roads • Nearly half (47%) are satisfied with the quality of the road side environment/aesthetics • Over three in five (62%) have not heard of the term Expressway • Nearly three-quarters (72%) are favourable towards Expressways
Keep It Green	<ul style="list-style-type: none"> • More likely to be aged 35-44 	The level of traffic on the roads today is intolerable, there is far too much pollution. The roads look too much like a concrete jungle – I like to see a bit of	<ul style="list-style-type: none"> • Nearly half (49%) are dissatisfied as to the levels of traffic pollution

	<ul style="list-style-type: none"> • More likely to be a full-time student 	<p>greenery when I'm driving. I'm not sure about these Expressways, they are just like motorways anyway so why call them anything different? Could the money not be better spent on improving other forms of transport, such as new cycle paths? We need to get cars off the road, not encourage them on. They also won't help to reduce pollution. I'm really worried that it will lead to a loss of countryside/green space as well – who can guarantee that it won't?</p>	<ul style="list-style-type: none"> • A quarter (24%) are dissatisfied with the roadside environment • One in five (19%) disagree that the term Expressway is a suitable term for this new type of A road • 12% are unfavourable towards the concept, whilst 35% of this segment gave an unfavourable reason as to why they weren't sure about them • 5% think money is better spent on other things, whilst the same proportion (5%) don't think it will reduce air pollution. Another 4% think it will lead to a loss of countryside/green space • 14% think the roads are fundamentally like motorways and should not be called anything else
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3.3 Differences in attitudes between segments

Throughout the report, any significant differences in responses between segments will be identified, along with any interesting differences between other sub-groups of SRN users.

Context

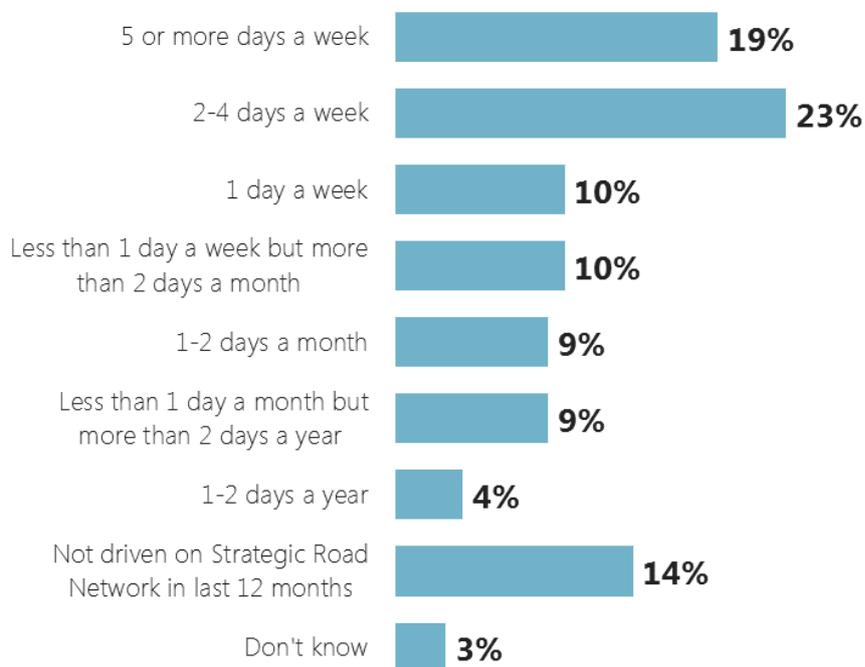
Current attitudes towards driving, and perceptions of existing roads

4 Context

4.1 Current use of strategic road network

Over half (52%) of the Strategic Road Network (SRN) users surveyed say they have driven on the SRN at least once a week in the last 12 months, indicating a regular usage of the SRN by at least half of all its users. Seven in ten (70%) say they have driven on the SRN at least once a month whilst over eight in ten (83%) say at least once a year. Although the majority say they have driven on the SRN at least once a year, one in seven (14%) say they have not driven on the network at all in the last twelve months.

S4. How frequently, if at all, have you personally driven on the Strategic Road Network in England in the past 12 months?



Base: All adults aged 18+ (2,005)

Source: Ipsos MORI

16-071741-01 HE Expressways Charts V1 Draft 1 INTERNAL USE ONLY

Looking towards the demographic profile of SRN users, the youngest (18-24) users are significantly less likely to say they have driven on the SRN at least once a week (46% v 52% overall) whilst those who are 35-44 are significantly more likely (57%). Those in the North West and West Midlands are significantly more likely to say they have driven on the SRN at least once a week (60% and 58% respectively v 52% overall), whereas those in Greater London are significantly less likely (37%). Drivers in these regions are also more likely to use the network for 5 days a week or more.

The importance of the SRN to the economy is again illustrated by the fact that those in work are significantly more likely to travel on the SRN regularly, with almost three in five stating they have driven on the SRN at least once a week in the last 12 months (58% v 52% overall). Those not in work are significantly less likely (35%). Looking towards social grade, those in higher grades (ABC1) are significantly more likely to have driven on the SRN at least once a month (73% v 70% overall).

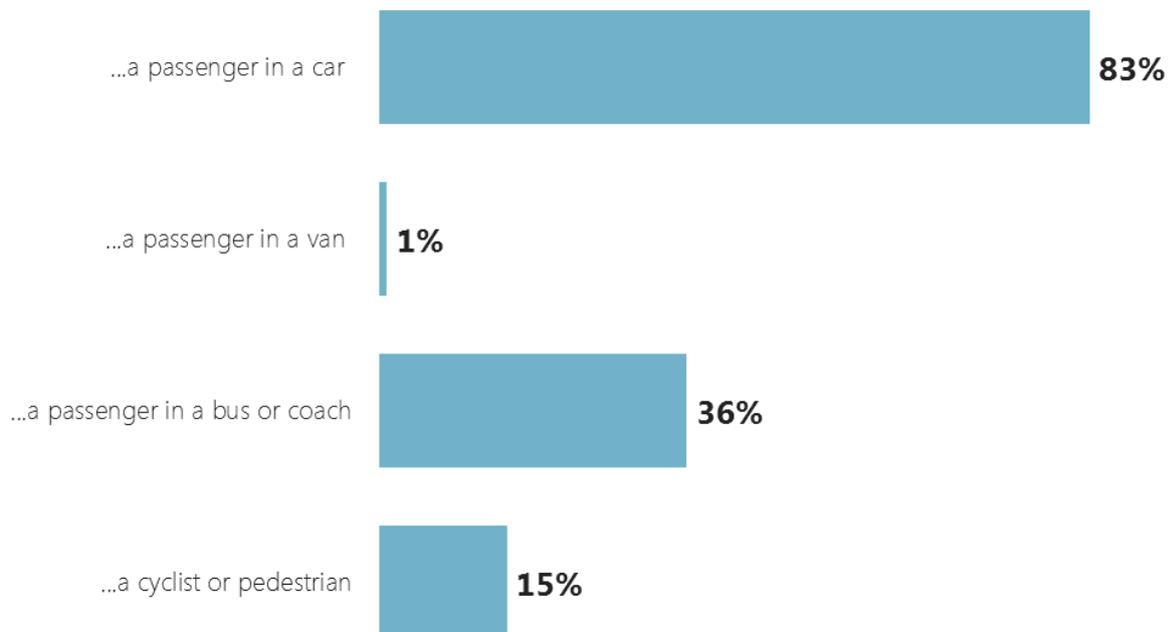
Those in lower grades (C2DE) appear to have travelled less frequently in the last 12 months, being significantly less likely to have travelled at least once a year on the SRN (79% v 83% overall).

When looking towards segments, the **Get Me Theres** indicate a more regular usage of the SRN, and are significantly more likely to say they have driven on the SRN at least once a week in the last 12 months (59% v 52% overall). It is the **No Strong Views** who are significantly more likely to say they have not driven on the SRN in the last 12 months (20% v 14% overall). The **Keep It Greens** are the group that are least likely to travel 5 days or more a week, with one in ten stating this (12% v 19% overall).

Of those who have not driven on the SRN in the last 12 months, over eight in ten say they have travelled on the SRN in the last 12 months as a passenger in a car (83%), over a third have travelled as a passenger in a bus or coach (36%), around one in seven (15%) say they have travelled as a cyclist or pedestrian and 1% say they have travelled as a passenger in a van.

Figure 4.1:

S5. Have you travelled on the Strategic Road Network in the last 12 months as...?



Base: All who have not driven on the SRN (342)

Source: Ipsos MORI

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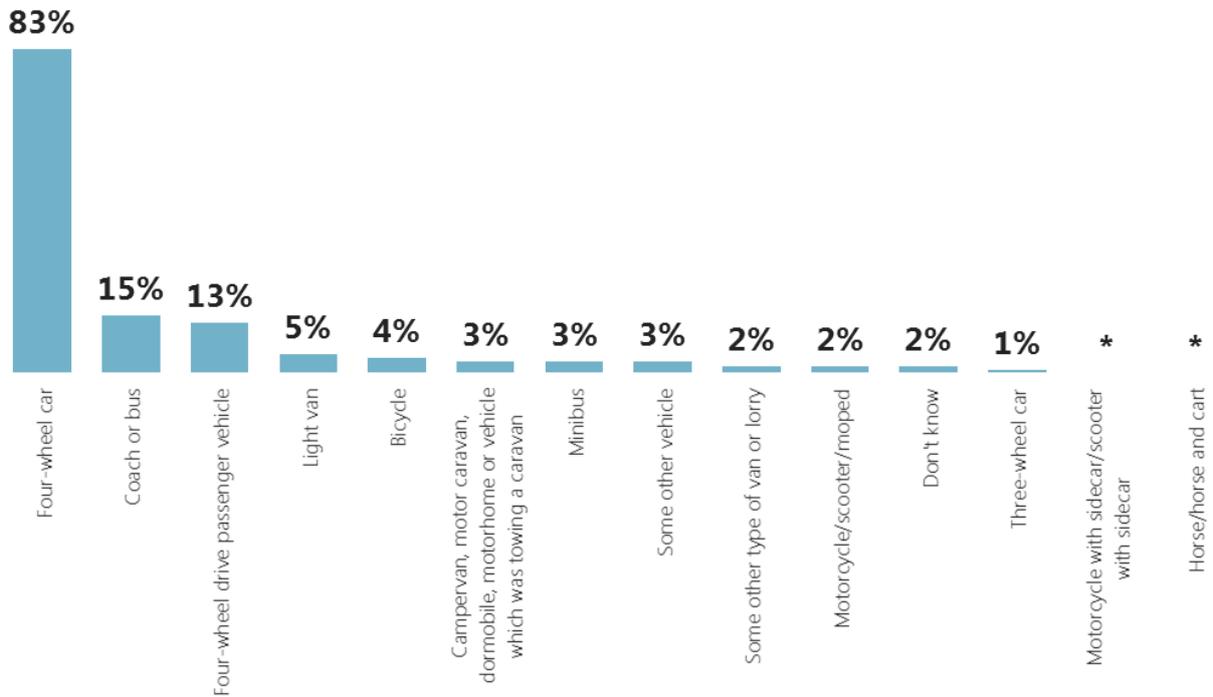
Younger respondents (aged 18-24) who have not driven on the SRN are significantly more likely to say they have travelled as a passenger in a car in the last 12 months, with over nine in ten citing this method (93% v 83% overall), whilst those in the 35-54 age group are more likely to say they have travelled on the SRN as a cyclist or pedestrian in the last 12 months (23%). In addition to this, it is male respondents who are significantly more likely to travel as a cyclist or pedestrian on the SRN compared to female respondents (20% v 12%). Regionally, those in Greater London are significantly less likely to

travel as a passenger in a car on the SRN (71% v 83% overall), perhaps reflecting the increased availability of public transport options in London compared to other areas of the country.

The British public also remain attached to their cars. When asked which type of vehicle(s) drivers and passengers have used on the SRN in the past 12 months, the majority of users cite the four-wheel car as the method of transport they have used the most (83%), followed by coach or bus (15%), and four-wheel drive passenger vehicles (e.g. Land Rover, Jeep or similar) (13%).

Figure 4.2:

Q1. Which type of vehicle or vehicles have you driven or been a passenger in on the Strategic Road Network during the past 12 months?



Base: All drivers and passengers on SRN (2,005)

Source: Ipsos MORI

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SRN users aged 25-34 are significantly more likely to say they have driven or been a passenger in a four-wheel car in the past 12 months (86% v 83% overall), whilst those in younger life stages (18-24) are significantly more likely to state they have travelled in either a four-wheel drive vehicle (18% v 13% overall) or minibus (6% v 3% overall). Those in education are more likely to travel on public transport, with one quarter citing coach or bus as a vehicle they have used on the SRN in the past 12 months (24% v 15% overall).

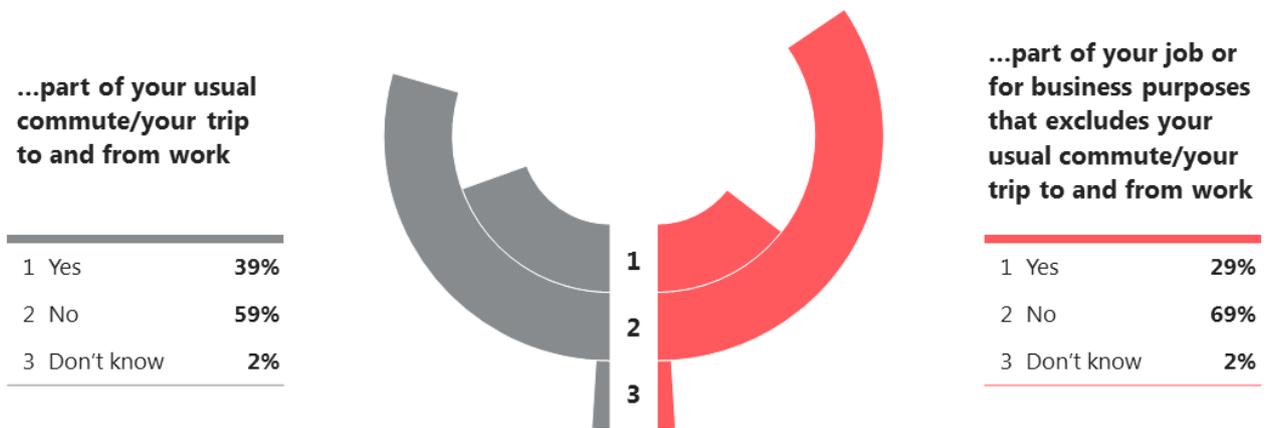
When looking towards segments, the **Get Me Theres** are significantly more likely than all other groups to say they have driven or been a passenger in a four-wheel car on the SRN in the last 12 months (92% v 83% overall), whereas the **No Strong Views** are significantly less likely (72%). The **Keep It Greens** as well as the **No Strong Views** are the groups who are significantly more likely to take a coach or bus (both 20% v 15% overall).

4.2 Purpose of current journeys

Users of the SRN (drivers and passengers) were asked if they have ever travelled on the SRN as either part of their usual commute/trip to work or part of their job or for business purposes (excluding commuting). Whilst a large number of SRN users state they use it for commuting or business purposes, the majority do not use the SRN for these reasons – almost two in five (39%) say they use it as part of their usual commute, whilst three in five (59%) say they do not. Just under one third say they use the SRN as part of their job (excluding commuting) (29%), whilst seven in ten (69%) do not.

Figure 4.3:

Q2. Do you ever travel on the Strategic Road Network as...?



Base: All drivers and passengers on SRN (2,005)

Source: Ipsos MORI

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Predictably, it is those who travel almost daily (5 or more days a week) on the SRN who are more likely to say they travel on the SRN for commuting purposes (82% v 39% overall) whilst non-drivers are significantly less likely (18%). A similar story can be seen for those travelling for business purposes with almost half of those travelling 5 or more days a week stating they use the SRN for business purposes (47% v 29% overall) and just one in ten (10%) of non-drivers mentioning the same.

Looking at the demographic profile, those who are aged 18-44 are significantly more likely to use the SRN as part of their commute to work (47% v 39% overall) whilst those who are 55-75 are significantly less likely (28% v 39% overall). Some similarities can be found for those who travel as part of their job/business purposes, with those aged 35-44 being significantly more likely to state they use the SRN for this purpose (34% v 29% overall) and again, those aged 55-75 significantly less likely (24%). Looking at the results by region, those who live in Greater London are significantly more likely

to say they do not use the SRN as part of their commute compared to the overall (67% v 59%). However, it is interesting to note that this is not the case with regard to using the SRN for job/business purposes, as those in Greater London are in line with the overall figure (both 29%). Those who are working are significantly more likely to travel on the SRN for both commuting and business purposes than those who are not working (50% v 11% commuting and 39% v 6% business purposes). A similar story can be found when looking towards social grade with those in higher social grades (ABC1) being significantly more likely to travel on the SRN for commuting and business purposes than those in lower social grades (C2DE) (40% v 36% commuting and 32% v 25% business purpose).

When looking towards segments, the **Keep It Greens** are significantly more likely than all other groups to say they do not travel on the SRN as part of their usual commute to work (66% v 59% overall).

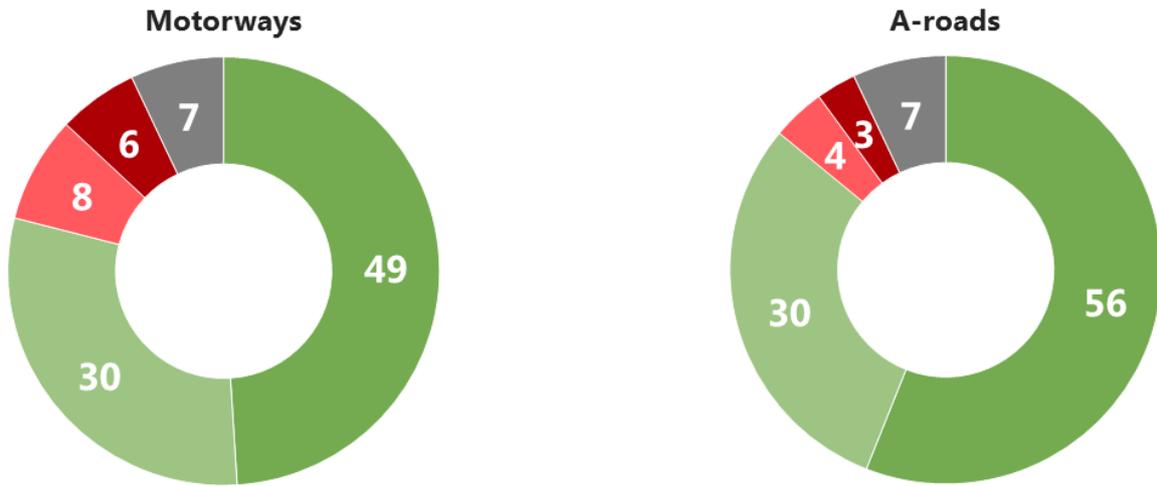
4.3 Confidence in using motorways / A roads

Users of the SRN were asked to gauge their confidence when driving on different types of roads, more specifically motorways and A roads. Confidence would appear to be strong with SRN users on the different types of roads, with 80% of SRN users stating they are confident when driving on motorways (49% stating they are very confident and 30% fairly confident). Just over one in ten (13%) state they are not confident driving on motorways, with just 8% saying they are not very confident and 6% not confident at all. A similar story can be found for A roads with almost nine in ten (86%) stating they are confident. Breaking this down further almost three in five (56%) feel very confident driving on A roads and one third feel fairly confident (30%). Less than one in ten do not feel confident driving on A roads (7%).

Figure 4.4:

Q3. And to what extent are you personally confident or not when driving on each of the following types of road in England?

■ % Very confident ■ % Fairly confident ■ % Not very confident ■ % Not at all confident ■ % Don't know



Base: All drivers and passengers on SRN (2,005)

Source: Ipsos MORI

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Regularity would appear to have a positive effect on confidence levels – those who drive on the SRN 5 days or more a week would appear to feel more confident driving on both motorways and A roads with three quarters stating they feel very confident driving on these roads (72% v 49% overall motorways, and 78% v 56% overall A roads). The opposite can be found for non-drivers (including passengers) with one in five not feeling confident at all on motorways (20% v 6% overall) and over one in ten on A roads (13% v 3% overall).

Male SRN users are significantly more likely to state that they are confident driving on both motorways and A roads (88% v 80% and 90% v 86% respectively) than overall. When looking towards age it is the younger SRN users who are significantly more likely to say they are *not* confident driving on either motorways or A roads (22% v 13% overall and 10% v 7% overall respectively). In contrast those aged 35-75 are significantly more likely to say they are confident driving on motorways and A roads (83% v 80% overall and 89% v 86% overall respectively).

4.4 Satisfaction with different aspects of A roads

Looking more closely at the different aspects of A roads in particular, SRN users were asked how satisfied or dissatisfied they were with each aspect.

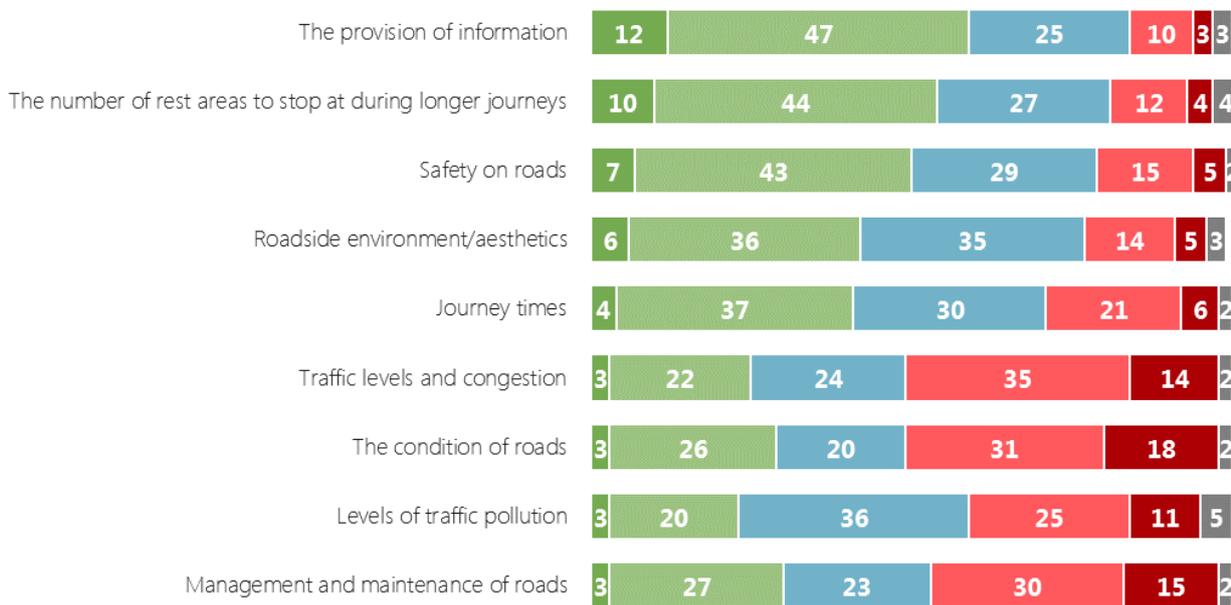
When looking at the top mentioned aspects, satisfaction is highest amongst SRN users with the provision of information (59%), followed by the number of rest areas to stop at during longer journeys (54%), and safety on roads (49%).

Conversely, SRN users are most dissatisfied with traffic levels and congestion (49%), the condition of roads (49%), and management and maintenance of roads (45%). It is important to note that the majority of SRN users did not have a strong opinion when answering this question with most users stating they are fairly satisfied/dissatisfied or neither/nor satisfied or dissatisfied.

Figure 4.5:

Q4. Thinking about A-roads in England, how satisfied or dissatisfied are you with each of the following...?

■ % Very satisfied ■ % Fairly satisfied ■ % Neither/nor ■ % Fairly dissatisfied ■ % Very dissatisfied ■ % Don't know



Base: All adults aged 18+ (2,005)

Source: Ipsos MORI

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Looking towards region, those in the North East are the most positive about A roads – SRN users in this region are significantly more likely than the overall to be satisfied with the majority of A road aspects, including: the provisions of information (70% v 59% overall), journey times (57% v 41% overall), condition of roads (39% v 29% overall), management and maintenance of roads (39% v 30% overall), traffic levels and congestion (36% v 24% overall), and traffic pollution (33% v 23% overall).

Looking at the aspects of A road SRN users, they are most critical of the condition and maintenance of roads and it is seen to be a more prevalent problem in the North West and the Midlands. Those in the North West, West Midlands, and East Midlands are significantly more likely to say they are dissatisfied with the condition of roads (56%, 56%, and 58% respectively v 49% overall). Additionally, those in the North West and West Midlands are significantly more likely to say they are dissatisfied with the management and maintenance of roads (both 52% respectively v 45% overall). However, as aforementioned, the differences may be explained by these regions having the most regular drivers.

The **Keep Me Safes** are the most positive group with regard to current A road aspects, being significantly more likely to say they are satisfied with almost all aspects, with the exception of management and maintenance of roads, as well as the number of rest areas to stop at during longer journeys. **Get Me Theres** are the most critical of groups, being significantly more likely to state they are dissatisfied with traffic levels and congestion (56% v 49% overall), the condition of roads (56% v 49% overall), and the management and maintenance of roads (52% v 45% overall).

4.5 Qualitative findings

SRN users' attitudes towards aspects of roads were further explored in focus groups undertaken in Warrington, Bath and Nottingham. Participants were asked to share their experiences on different types of roads (A roads, single and dual carriageway, and motorways), as well as detailing aspects of the roads that they liked/disliked, with a specific aim to determine what drives their opinion currently and how this forms their views when looking further towards Expressways.

Pedestrians, cyclists, and large vehicles

A number of focus group participants' comments revolved around other users of the road, as well as the provisions available to them. Participants conveyed that road users such as cyclists and larger vehicles (e.g. tractors) limited other users (mainly those that travel in cars) with their presence and/or speed. Provisions such as cycle lanes would appear to irritate some car drivers, as they limit space available on the road, whilst some participants were of the view that roads should require the alternative provisions from a safety perspective.

"One thing that really annoys me is the cycle lane, it's so small that there is no point having it, the roads are already too narrow."

Focus group participant

"The problem with tractors is there's a big field just there, why don't they go in that?"

Focus group participant

"You've got to have things for pedestrians, the roads are not just for people in cars, the people need to have access to the roads whether it's crossing it or riding a bike, and it needs to be safe for you as well"

Focus group participant

Entering and exiting the roads

Some focus group participants expressed concern over entering and exiting roads, particularly slip roads joining onto dual carriageways and A roads. Whilst confidence would appear to play a factor into some participants' experiences, some cited the length of road available as a problem with current slip roads. Opinions expressed in the groups also suggested that the awareness of other drivers on the road would appear to be a problem when entering and exiting the roads - other drivers on the road would appear to not act appropriately to allow other drivers to join the road.

“Perhaps having the slip road on for a little bit longer to give people more time to be aware that there’s a car there.”

Focus group participant

“...they [slip roads] can be bad too, horrendous, a short space to get on at junctions.”

Focus group participant

“If you’re coming on and you’re indicating to move, they don’t sort of try and move out of your way, they either speed up or they slow down just to make it awkward for you to get on”

Focus group participant

Signage

Signs on A roads and motorways generated mixed opinions amongst focus group participants. Some participants expressed favourability towards electronic signage in particular, mentioning the information provided can be useful and allow for users to plan ahead in their journeys. Other participants had opposing views mentioning electronic signage can be unreliable at times and provide ‘out of date’ information, i.e. lane closure once obstruction has been cleared. Other opinions of signage included difficulties with visibility, with some participants stating that (non-electronic) signs are not visible at night, as well as non-compliance with instructions displayed on signs potentially due to road users not trusting the information.

“If you’re in traffic it’s nice to get alerts of further delays ahead”

Focus group participant

“I don’t think they’re [the signs] too bad in the day time but at night they’re not well lit so I need to put my main beam on to see the signs”

Focus group participant

“...some people are ignoring [the information on signs] it because they go through assume it will be fine...because sometimes it is fine”

Focus group participant

Motorways

Focus group participants provided a variety of opinions on motorways including their expectations, importance, and classification in the network.

Participants drew attention to other driver behaviour on motorways as a substantial problem with regards to safety, citing that other drivers do not take into consideration others on the road, as well as selfish driving patterns and aggressive driving.

“Anybody who wants to get where they’re going will take the easiest way possible, so some people don’t show consideration for other people on that road; they just want to get there”

Focus group participant

“You always get someone coming from behind speeding”

Focus group participant

Motorways were largely regarded as the ‘premium’ road amongst focus group participants due to their features, safety, and coverage across England. ‘Smart Motorways’ in particular were favoured by participants due to their provisions which allow for less delays and better traffic flow, as well as the information provided by way of overhead gantries which proved useful to participants allowing them to reroute journeys as well as being ‘in the know’ in relation to delays and traffic.

“...smart motorways are very good; the traffic flows better, because there’s a stretch of road on the M62 and there’s been roadworks for about six months now and it’s 50mph and there’s no queues”

Focus group participant

“...they are good; they should have more because makes you more aware about what is there”

Focus group participant

In addition to focus group participants viewing Motorways as the ‘premium’ network in England, comparisons were also made by participants to similar roads in other countries in Europe, with British Motorways perceived as the superior network in certain aspects, such as safety and reliability.

“In defence of Britain, our motorways are much better than foreign motorways, I’ve lived in Germany and it’s better even than Autobahns... When the weather is bad it’s safer in England than Germany because of water and speed; it’s because of the granular surface in England”

Focus group participant

A roads

Whilst focus group participants primarily viewed motorways as the ‘premium’ network, merits and grievances were found with A roads.

When looking specifically toward single carriageway A roads, the lighting and visibility points discussed earlier would appear to be an issue amongst focus group participants. Participants cited that they felt less confident driving on some single carriageway A roads in the evenings especially those away from urban areas. Additionally, some participants felt that speed limits should also play a part at different times of the day as the higher limit would encourage motorists to drive faster despite limited visibility at night.

Some consensus was reached amongst participants regarding the cleanliness of A roads, more so in rural areas where visibility of signage is affected by foliage.

"[In reply to "Are you confident driving on single carriageway A roads"] At night time, not very. I think they're not very well lit... I prefer the motorway because there's more cars so more lights"

Focus group participant

"I don't think they're too bad in the day time but at night they're not well lit so I need to put my main beam on to see the signs."

Focus group participant

"[When driving on] Country lanes, the signs are full of moss so you can't see them. The ones near trees, they need maintenance and cleaning."

Focus group participant

Some focus group participants were of the view that reliability is greater on A roads compared to motorways in terms of accessibility. Participants felt that improvements were mainly made on motorways and busier roads which results in quieter/smaller A roads being left as they are – this was regarded as positive to those that lived in the area as it minimised disruption.

"[Speaking of A roads] There's not that many changes... the junctions that seem to change a lot and roundabouts they might get taken out. But the A roads get left how they are... that's good for the people..."

Focus group participant

"Small A roads go direct from place to place...if you're a local you can go straight through"

Focus group participant

Whilst reliability was viewed positively amongst participants, congestion still remained an issue to some, more specifically with larger vehicles as well as non-motorists that use the roads such as cyclists. Participants felt that with smaller and more rural A roads, traffic can form easily when larger vehicles join the road as well as cyclists as the limited space confines overtaking.

"Slow motorists and milk floats slow everything down"

Focus group participant

"If it's designed for 50mph and you can't get past a cyclist, then it defeats the purpose"

Focus group participant

Concept

Previous knowledge of Expressways, and general views of the concept

5 Concept

5.1 Unprompted awareness

Before introducing the concept of Expressways, SRN users were asked if they had heard of the term 'Expressway' before the time of them completing the survey. Whilst almost three in five (56%) said they had not heard of the term, over two in five stated they had (44%).

Figure 5.1:

Q5. Before today, had you heard of the term 'Expressway'?



Base: All adults aged 18+ (2,005)

Source: Ipsos MORI

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As expected, those who use the SRN more regularly are significantly more likely to have heard of the Expressways term before. Those who regularly drive on the SRN at least once a week are significantly more likely to say they have heard of the term (50%) whilst those who do not drive on the SRN are significantly less likely (33% v 44% overall). In addition, those who use the SRN for commuting (48%) and business purposes (53%), as well as those who are confident on motorways (47%) and A roads (46%), are all significantly more likely to have heard of the Expressways term before.

Demographically, men are significantly more likely than women to say they have heard of Expressways (49% v 38%). SRN users aged 55-75 are more likely to have heard of the term compared to all other ages (53% v 44% overall) and those who are retired are also significantly more likely to say they have heard of the term (56% v 44% overall). However, those in education are significantly more likely to state the opposite (72% v 56% overall). Regionally, those in the North West and

“To me it means something that is quicker, simpler and easier, essentially a shortcut”

18-24 Female survey respondent

“Faster more direct route that allows you to reduce journey time and reduces carbon emission and congestion levels”

55-75 Female survey respondent

“A route designed to allow the movement of bulk traffic through an area without interruption. The aim to bypass or avoid bottle necks and to channel traffic away from surrounding minor roads”

35-54 Male survey respondent

There also appears to be a view amongst some SRN users that the Expressways concept draws similarities to certain American roads, such as ‘freeways’. The similarities would appear to stem from the Expressway features of minimal stopping along the route (no traffic lights) and, again, the speed that users will be able to travel at using the Expressway.

“It is like a freeway in the US, so a motorway that has no stops at traffic lights or roundabouts / intersections but free passage for as long as a vehicle is on it”

35-54 Female survey respondent

“Like a motorway, but American or from another country”

18-24 Male survey respondent

“Fast road. Like a dual carriage way, you get a lot of them in USA”

18-24 Male survey respondent

Another theme amongst a large number of SRN users’ opinions of Expressways revolved around whether the road being described would be a toll road. It would appear that SRN users are of the view that whilst an Expressway would seem to be a quicker route, it would require a fee to use.

“Toll road, you pay to go on a road that is likely to be less congested...”

35-54 Female survey respondent

“A main road which you pay a toll in order to drive on”

35-54 Male survey respondent

“Designated driving route usually with a toll”

25-34 Female survey respondent

“Same as a toll road. I think you have to pay to use it”

55-75 Female survey respondent

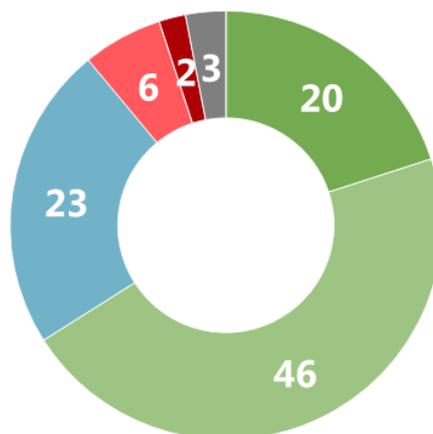
5.3 Favourability towards concept

Once the concept was introduced to SRN users, they were asked to rate their favourability towards Expressways. Two thirds of SRN users (67%) expressed favourability towards Expressways whilst less than one in ten (8%) stated they were not favourable. It is important to note that one quarter (23%) of SRN users have no opinion either way, which suggests that with the information provided, it is still difficult for some SRN users to feel favourable or unfavourable of the concept at this stage.

Figure 5.3:

Q8. Knowing what you now know about the concept, to what extent are you favourable or unfavourable towards Expressways?

- % Very favourable
- % Fairly favourable
- % Neither/nor
- % Fairly unfavourable
- % Very unfavourable
- % Don't know



Base: All drivers and passengers on SRN (2,005)

Source: Ipsos MORI

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Regularity of driving on the SRN would appear to correlate with favourability of the Expressways concept, with those who use the roads 5 days or more a week being significantly more likely to be very favourable (29% v 20% overall). Similarly, those who use the SRN for commuting (23%) and business purposes (24%) are also significantly more likely to be very favourable of the concept. Non-drivers were significantly more likely to not provide an opinion either way or at all with almost three in ten being neither favourable nor unfavourable of the concept (28% v 23% overall) and almost one in ten saying they don't know (8% v 3% overall). Those feeling confident on both motorways and A roads were also significantly more likely to be very favourable of the concept (23% motorways and 22% A roads v 20% overall) whilst those not confident on both types of roads were significantly less likely to feel the same way (11% motorways and 8% A roads).

Demographically, male SRN users are significantly more likely to state they are favourable of the Expressways concept than female SRN users (70% v 64%). Older SRN users (65-75) are significantly more positive of Expressways with a third

stating they are very favourable (32% v 20% overall) – in contrast to this those aged 55–64 are significantly more likely to be unfavourable (11% v 8% overall). The Expressways concept would appear to appeal more to retired SRN users with over one quarter stating they were very favourable of the concept (26% v 20% overall) whereas those not in work were more likely to provide an opinion either way (31% v 23% overall). Regionally, favourability is more prominent in the North West with one quarter of SRN users in the area stating they are very favourable of Expressways, significantly higher than the overall (25% v 20% overall). Those in the North West were also significantly more likely to be dissatisfied with the management and maintenance of roads, so in their view anything which might improve this is worth supporting. Those in the South West are significantly more likely to not have an opinion either way (29% v 23% overall).

The Expressways concept is positively regarded amongst most segments with the **Get Me Theres**, **Tell Me Mores**, and **Keep Me Safes** all significantly more likely to be favourable (74%, 74%, and 72% respectively v 67% overall). The **No Strong Views** and **Keep It Greens** were less likely to be of the same view (54% and 60% respectively).

Top of mind insights from focus groups and stakeholder interviews

Evidence from the focus groups was more nuanced. Whilst on the whole participants supported a concept which appealed to their apparent priorities when driving (i.e. relieving congestion, excluding slow moving vehicles/obstructions), there was a lack of understanding in some groups as to the Expressways concept. Naturally, participants wanted to know where this type of concept would be implemented, and given the roll out of it is at a fairly early stage, details of exact projects could not be confirmed.

“I was wondering how feasible it is. I mean, it’s a great idea but will it work?”

Male participant, Nottingham

“I can’t see how the new Expressway relates to all the other road networks – it’s still fundamentally going to deal with the same daily problems

Participant, Bath

Groups therefore tended to pose more detailed questions and were keen to know more detail about the proposed scheme. Some groups identified the time it would take to roll out the concept (2040 in the video), which made them believe that it was aspirational and they would not enjoy the benefit:

“It’ll be great in 2040 after 20 years of road works!!”

Participant, Bath

Similar to the response from focus group participants, stakeholders also expressed an interest in finding out more information of exactly what Expressways entail as none could speak about the concept with a high level of detail.

All stakeholders spoken to felt that they had some understanding of what Expressways entailed with regards to its features (emergency refuge areas, speed limits, traffic flow management etc.) but none of the stakeholders felt they had a robust understanding when looking towards the design as well as the definition of the road. As such, one of the key messages conveyed by stakeholders was a need for more information in order to adapt and update their internet materials so that members are ready and up to date with the rules of the new type of road.

“We want to share information with Highways England on the best way to drive these roads, what to look out for and we would have to update our training material to incorporate expressways.”

iAM RoadSmart

However, there is no doubt that introducing the Expressways concept ‘whetted the appetite’ of SRN users.

“The idea’s wonderful...the concept is wonderful”

Male participant, Nottingham

“The benefits to people’s lives should outweigh the costs and disruption”

Male respondent, Warrington

“If it gets the traffic flowing, definitely”

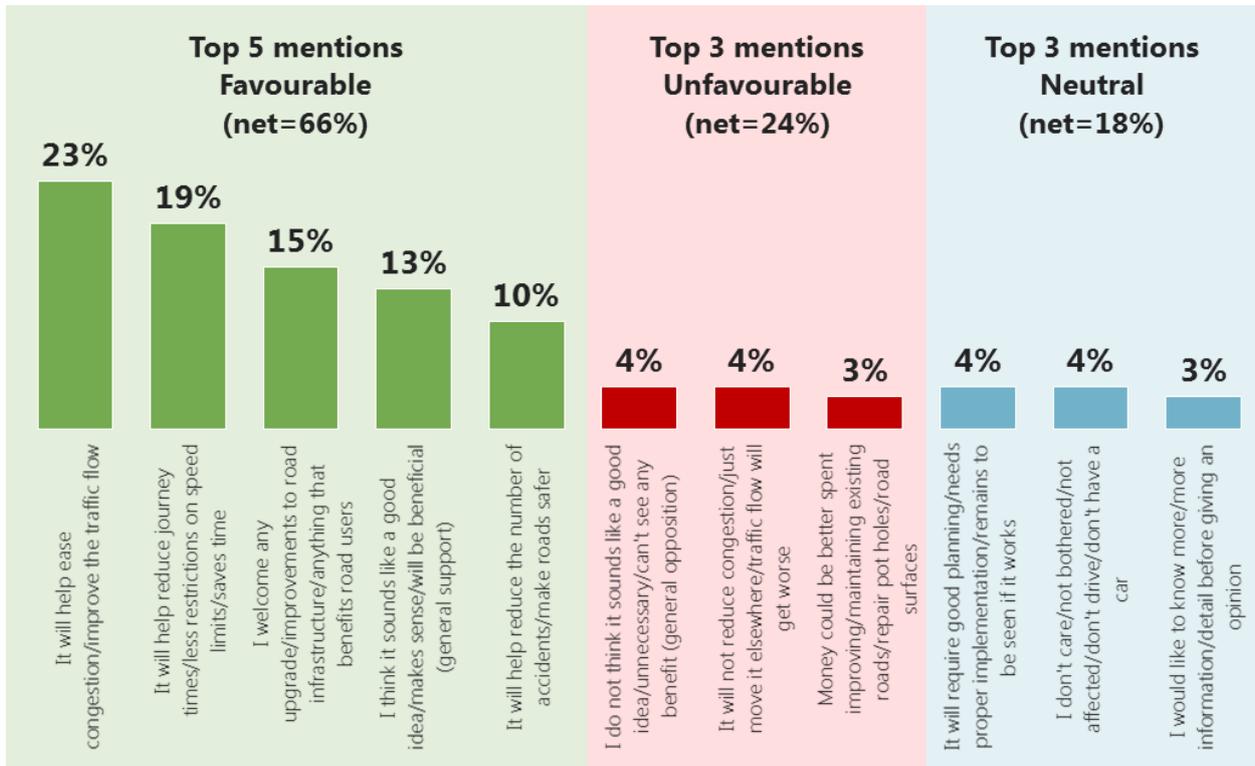
Female respondent, Warrington

5.4 Reasons why favourable / unfavourable

Those who had an opinion towards the Expressway concept were asked to elaborate on the reasoning for their opinion. The majority of those who have an opinion of Expressways conveyed favourable comments about the concept with the most prevalent favourable opinions focussed on improvements to their overall journey. Unfavourable comments concentrated on the concept being bad overall and using money elsewhere, whilst those who provided neutral comments appear to be less engaged with the concept or need more information.

Figure 5.4:

Q9. Why do you say that?



Base: All who have an opinion towards Expressways (1,953)

Source: Ipsos MORI

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Those travelling frequently (5 days or more a week) on the SRN were particularly positive about the possibility for a reduction in journey times with almost one quarter (23% v 19% overall) mentioning this; those who travelled not as regularly but still frequently on the SRN (at least once a week) were significantly more likely to mention easing congestion and improvement with traffic flow (25% v 23% overall).

Those in aged 55-75 were likewise significantly more likely to be positive of Expressways with regards to ease in congestion/improvement to traffic flow (26%), reduction in journey times (22%), and improvements to the road structure (18%). Younger SRN users (18-24) were significantly more likely to mention ease of use in their responses with 13% mentioning this (compared to 8% overall). Those in the North West and West and West Midlands were particularly optimistic with easing congestion and improving traffic flow with three in ten citing this in their response (28% North West and 31% West Midlands) whilst those in the South East were significantly more likely to say that the Expressways concept is a bad idea (7% v 4% overall). Those in the North East were significantly more likely to mention convenience and efficiency in their response (14% v 8% overall).

Somewhat expectedly the **Get Me Theres** were significantly more likely to mention reduction in journey times in their response with one quarter citing this (35% v 19% overall). The **Keep It Greens** are the group who were significantly more likely to provide an unfavourable response (25% v 24%), being more likely to mention getting cars off the road/money being better spent on public transport (5% v 1% overall), no reduction in pollution (5% v 1% overall), loss of green space (4% v 1% overall) as well as no benefit to pedestrians and cyclists (3% v 1% overall). The **No Strong Views** were

significantly more likely to be neutral (25% v 18% overall), in particular being significantly more likely to mention more information being needed (6% v 3% overall).

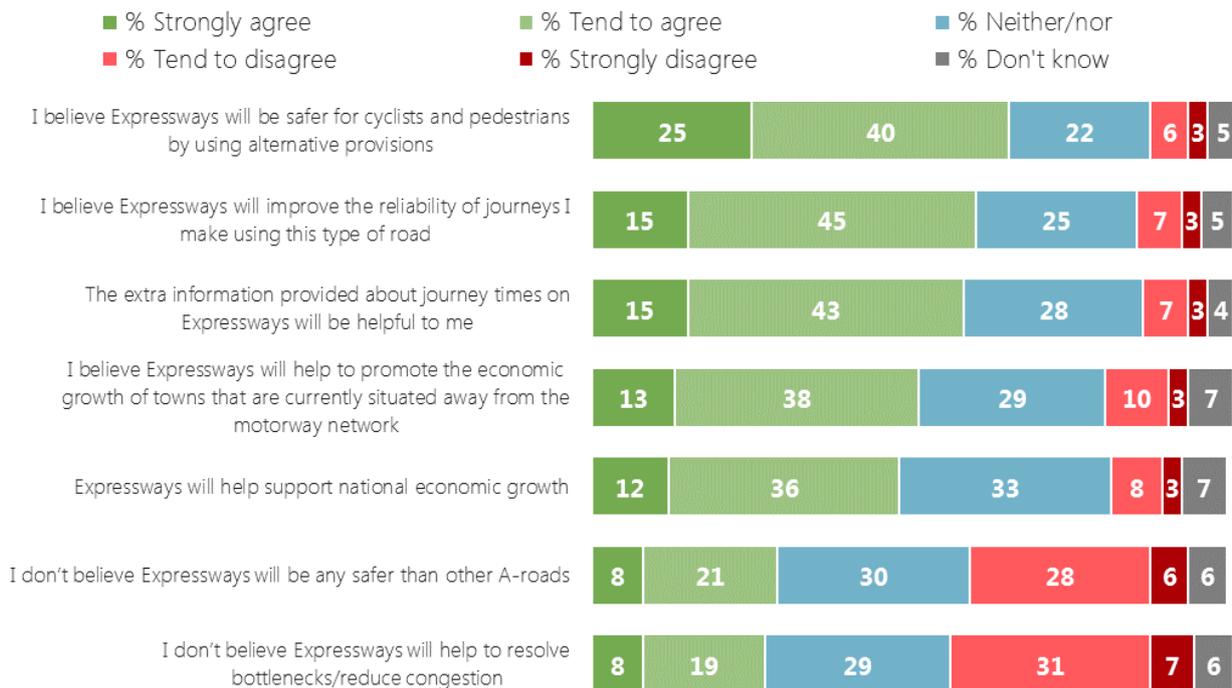
5.5 Wider attitudes towards Expressways

SRN users were presented with a list of statements about Expressways and asked to what extent they agree or disagree with each statement. Two thirds (64%) of SRN users believed that Expressways will be safer for cyclists and pedestrians whilst three in five (60%) agreed that Expressways will improve reliability of journeys when using the road.

A similar amount (58%) of SRN users agreed that the extra information provided will be helpful to them whilst just over half (51%) believed that Expressways will help promote the economic growth of towns away from the Motorway network. Agreement was slightly less when looking at economic growth on a national level (49%). Three in ten (29%) agreed that Expressways will not be any safer than other A roads. However over one third (35%) disagreed with this statement. Similarly, just over one quarter (27%) agreed that Expressways will not help resolve bottlenecks/reduce congestion however almost two in five disagreed with this statement (38%).

Figure 5.5:

Q11. To what extent do you agree or disagree with the following statements about Expressways?



Base: All adults aged 18+ (2,005)

Source: Ipsos MORI

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Regular drivers on the SRN would appear to be the most positive across the board – those who have travelled on the SRN at least once a week in the last 12 months are significantly more likely to agree (disagree at negative statements) with all

statements. Conversely, non-drivers appear to be less inclined to provide an opinion at all, significantly more likely to state they don't know to all statements.

Looking towards regions, those in the North West would appear to be more favourable about the Expressways concept with regard to journey reliability as well as promoting economic growth, being significantly more likely to strongly agree with these statements (20% v 15% overall and 17% v 13% overall respectively).

Looking towards segments, the **Get Me Theres** would appear to have the most optimism about Expressways, significantly more likely to agree to them improving journey reliability and being safer for cyclists and pedestrians by use of alternative provisions, additionally, the **Get Me Theres** are significantly more likely to disagree that Expressways will not be any safer than existing A roads and Expressways will not help reduce congestion.

Characteristics

Attitudes towards different features of Expressways

6 Characteristics

6.1 Purpose of a MaxDiff module

Respondents to the quantitative survey were presented with a MaxDiff exercise in relation to the 16 features of Expressways. This exercise presented a series of four features and asked respondents to rate their most and least preferred. In total 12 screens were presented with four features in each.

The results provide an indication as to the relative importance of key Expressway features.

6.2 Results of MaxDiff module

The table below shows the ranking of each Expressway feature. Each feature has subsequently been categorised for analysis purposes in order to better understand what are the underlying priorities for SRN users when it comes to designing the new road.

Table 6.1 - Results of MaxDiff

Category				Feature	Average Utility
Flow	Safety	Design	Tech		
				Exclusion of slow moving vehicles (e.g. tractors), pedestrians and cyclists, who will be provided with alternatives such as pedestrian/cycle routes, bridges or underpasses	9.88
				Dual carriageway road throughout, with two or three lanes in each direction	9.31
				No right turns which force a driver to cross the opposite carriageway (exits will always be via a junction on the left hand side)	8.94
				Signs which give users sufficient warning of upcoming junctions and which include clear destination and route information	8.59
				Emergency refuge areas, which are lay-bys located next to the carriageway at regular intervals for vehicles to stop in an emergency	7.58
				Concrete barrier in the central reservation, which prevents vehicles from crossing over to the opposite carriageway	7.43
				Electronic signs, which display information about hazards, accidents, slowing traffic, or other useful messages	7.38
				Motorway-style junctions to make joining and leaving the road easier	7.05
				Technology to automatically detect when traffic begins to become congested and sets a variable speed limit on electronic signs to control flow	6.88

				No direct access on to the expressway from houses or fields (access will always be via a junction where the road merges in from the left hand side)	6.18
				Cameras (CCTV) to detect and help clear incidents more quickly	5.44
				An environmentally friendly design that is sensitive to the surrounding landscape of the route (e.g. air quality, wildlife, noise)	4.91
				The availability of road service areas to allow drivers to take a break	3.88
				Motorway-style numbered junctions and driver location signs	3.02
				The presence of Traffic Officers	1.94
				Signs to say that you have joined or left an expressway	1.59

The essentials

The top three features selected as being the most important for an Expressway, are all features which will deliver the improved **flow of traffic** for SRN users. The exclusion of slow moving vehicles/pedestrians remove obstacles which many SRN users find slow them down, whilst the continuity of a dual carriageway throughout means that factors which can break up a journey, such as roundabouts and traffic lights, no longer do so. SRN users also think that preventing vehicles and other road users from crossing the carriageway is vital.

Participants in some of the focus groups also tended to prioritise flow as integral to successful delivery of the Expressways concept.

“For them to work, these have to be top. You need local access to go surely, so alternative local provision for non-motor uses is important.”

Female, Nottingham

Whilst guaranteeing flow was deemed important, so was safety, and some of these features were also recognised due to the importance placed on **safety**. Participants recognised the safety issue for non-motorised users, and therefore understood the importance of excluding them from the roads (although it should be pointed out that participants did not always necessarily consider the need for alternative provision for them to facilitate access across or underneath the new Expressway).

“You literally couldn’t have a road like this without separate provision (i.e. for pedestrians and cyclists)”

Male, Bath

“You can’t put something in place like that and not think of the effect it’s going to have on everybody, and not just drivers” Female, Warrington

Safety is also considered integral to any new road development and SRN users understand that roads need to be safe, and features involving safety are important.

“If you’ve got a little old lady who want to get to the other side, that’s not fair, they should have a crossing” Male, Warrington

However, some focus group participants did not always appreciate how some features contributed to driver safety and it should not be assumed that SRN users understand the importance of certain safety features.

“[On concrete barriers] I see it as a good thing to stop you getting into that lane, it’s also a bit intimidating but that comes down to the height of it” Female, Warrington

“Stopping (on the hard shoulder/strip) is as scary as hell” Female, Nottingham

Contribution of technology

SRN users do not always understand the importance of road technology in contributing towards maintaining the flow of traffic and also the pivotal role it plays in keeping the road safe. Participants in the focus groups referenced smart motorways when discussing the technological features of Expressways, but awareness tended to be those who had driven on a smart motorway. Certainly, users associate technology with motorways, and this drives some people to think Expressways are more like motorways.

***“There seems to be more assistance on there [motorways], more presence on there, you’ve got your CCTV on there and you’ve got your traffic detection”
Female, Warrington***

One group suggested that CCTV negated the need for traffic officers, and therefore did not make the connection that CCTV is integral to clearing carriageways of incidents which then enables traffic to begin flowing freely again. This also goes for the traffic detection system as well.

***“Traffic officers are not important because if there was more CCTV you don’t need them”
Male, Warrington***

***“The traffic detection and surveillance is going to be important because despite what they might think these roads will soon fill up”
Male, Nottingham***

The 'nice to haves'

Other design features were deemed to not be of a high priority by SRN users compared to flow, technological and safety features. Whilst the presence of off road rest areas was welcomed by those with families, the most common view was that journeys on Expressways would not be sufficiently lengthy to warrant the need to stop. Participants in the focus group described how they tend to prepare for motorway journeys – they pack up the car, perhaps a picnic as well – and therefore service station sojourns are integral to any lengthy motorway journey. Most did not expect their journeys to be long and therefore could not comprehend the need for such rest areas.

“How often do you have them on motorway? I mean the road isn't going to be long enough”

Participant, Warrington

However, some felt the absence of such facilities would be a safety issue.

“I think this comes down to comfort, but then when you've got children in the car and they want to go to the toilet it comes down to safety”

Female, Warrington

In terms of signage (branding and motorway style junctions) views were a bit more mixed.

“A lot of people use satnav nowadays don't they, so a lot of people won't even pay attention to that”

Female, Warrington

Whilst some felt signage and branding were critical to know what type of road you are driving on.

“You know straight away you're on a motorway because the signs are blue”

Female, Nottingham

6.3 Environment

SRN users were asked what they understood by the term 'Environment' in relation to the construction of new roads. In summary, the aesthetics of any new road was not seen as a priority over other flow, safety and technological features. On the whole participants tended to refer to pollution caused by traffic congestion, and also about protecting wildlife from any new construction, without referencing the importance of an aesthetically pleasing road.

Figure 6.1 shows the words used most often by users of the SRN when asked about the environment.

"[I hope] that it will try to not disturb the natural environment, such as wildlife and vegetation during and after the construction of the road."

25-34 Female survey respondent

"Not destroying scenic land or disturbing wildlife or social domestic dwellings unnecessarily"

25-34 Male survey respondent

"I'm concerned about it destroying green areas and disturbing wild life. Also, pollution from traffic"

55-74 Female survey respondent

The issue of environmental aesthetics was tested during the focus groups. In short, environmental considerations were well down the priority list, and the majority of participants would prefer optimisation of driving times than investment into environmental features.

When asked to think about the environmental challenges facing the SRN, most participants referenced pollution, noise and air quality. These were seen as the key environmental issues which should be a priority over aesthetic design:

"If cars don't produce emissions in 40 years, people will care more about how it (the SRN) looks"

Female, Bath

"It's not important WHAT you see...it's noise reduction and sound"

Female, Nottingham

"From a driver's point of view it doesn't matter...and shouldn't be on that list (i.e. to rank)"

Male, Bath

Participants were able to appreciate the financial pressures within the public sector and understood that there are other priorities when it comes to delivering infrastructure. However, travelling from A to B in the fastest time possible remains the priority for most, although some participants did agree that they would rather travel on an attractive route than not if given the choice:

"I probably won't alter my driving, but I think it would be nice and if I had two choices I think I'd go for the one with the nicer view"

Male, Warrington

Communication

How Expressways should be presented to SRN users

7 Communication

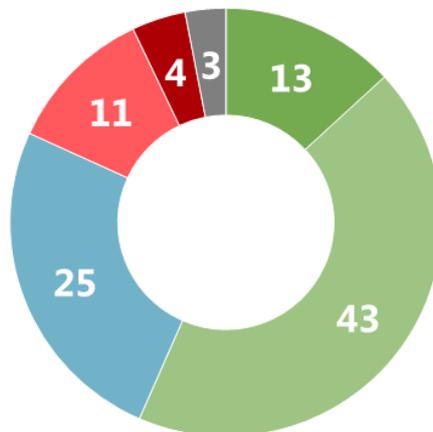
7.1 Suitability of name

After being introduced to the concept and discussing the different characteristics, SRN users were asked if the term 'Expressway' is a suitable name for the new type of A road. Over half (56%) of SRN users were in agreement that 'Expressway' was a suitable term, however, it is important to note that the majority of agreement was 'tend to agree' (43%) rather than strongly agree (13%). One quarter of SRN users were not able to provide an opinion either way (25%) whilst around one in seven were in disagreement (15%).

Figure 7.1:

Q7. Thinking about the description you have just read, to what extent do you agree or disagree that 'Expressway' is a suitable term for this new type of A-road?

- % Strongly agree
- % Tend to agree
- % Neither/nor
- % Tend to disagree
- % Strongly disagree
- % Don't know



Base: All drivers and passengers on SRN (2,005)

Source: Ipsos MORI

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Those who had driven more frequently on the SRN in the past 12 months (5 days a week or more) are significantly more likely to be positive of the term with one in five (20% v 13% overall) stating they strongly agree it is a suitable term. In addition to this, those who used the SRN for commuting (18%) and for businesses purposes (16%) are also significantly more likely to strongly agree. Non-drivers are less inclined than all other groups to provide an opinion either way (30% v 25% overall).

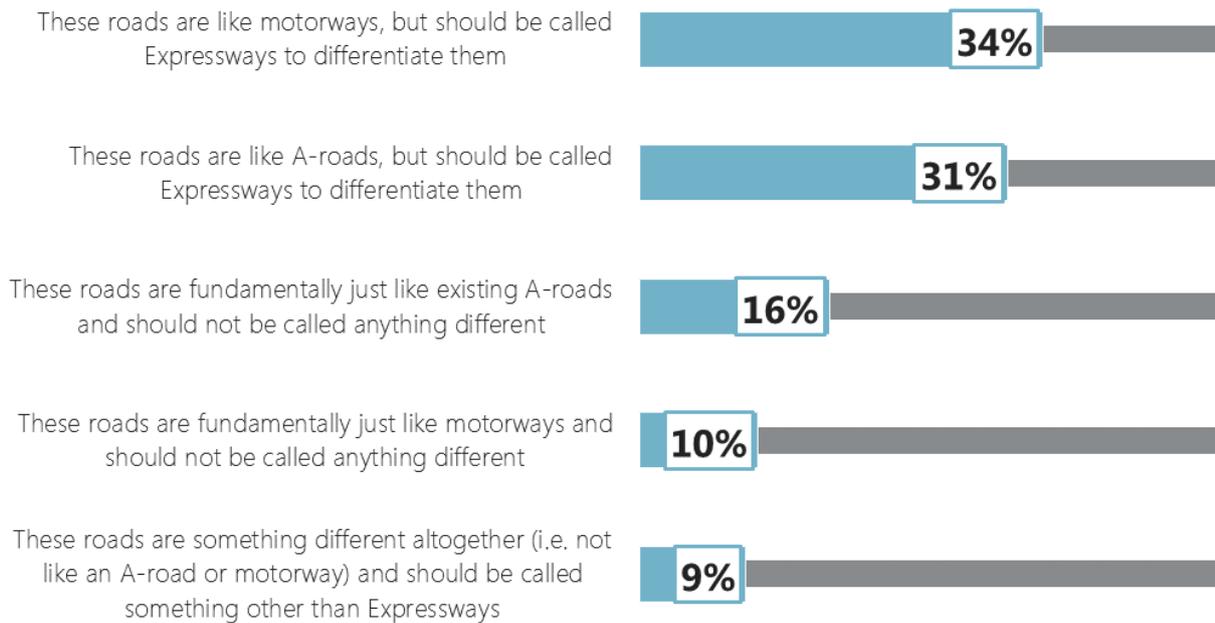
The **Keep It Greens** were the most critical of the ‘Expressway’ term with one in five disagreeing with the name suitability (19% v 15% overall). The **No Strong Views** were the least inclined of all segments to provide an opinion either way with one third stating this (32% v 25% overall).

7.2 Road categorisation

SRN users were asked to categorise the new type of road. Over one third (34%) of SRN users felt that the road was closer to a motorway, however it should have the Expressways name to differentiate it. Slightly fewer were of the same opinion but aligned the road closer to A roads (31%). Under one in five (16%) felt that the roads are essentially A roads and should not be called anything different, whilst one in ten (10%) felt the same but aligned the roads closer to motorways. Under one in ten (9%) felt the roads were something different altogether and should have another name than Expressways.

Figure 7.2:

Q12. Which of the following statements best describes your opinion towards the type of road which you have just read about?



Base: All adults aged 18+ (2,005)

Source: Ipsos MORI

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Frequent drivers on the SRN (5 days or more a week) were significantly more likely to align the roads to A roads but call them Expressways (36% v 31% overall) whilst non-drivers were significantly more likely to view the road differently and should have a different name entirely (13% v 9% overall). Those who used the SRN for commuting were significantly more likely to compare the roads to motorways but name them Expressways (36% v 34% overall). However, those who used the SRN for business purposes did not share the same view and were significantly less likely to name them Expressways. (30%).

Opinions remain fairly consistent across demographics with minimal significant differences. Those aged 55-64 are significantly more likely to say that the roads are something entirely different (12% v 9% overall) whilst those aged 35-54 were more inclined to say the road was closer to an A road and should not be called anything different (19% v 16% overall).

The **No Strong Views** were significantly more likely to align the roads closer to A roads and not need a new name to differentiate (23% v 16% overall) whilst the **Keep It Greens** were significantly more likely to say the roads were closer to motorways but should not have a new name (14% v 10% overall).

Whilst there is no conclusive view from the quantitative survey about whether Expressways are more like A roads or motorways, there were certain features which led people to align them more to motorways than A roads, specifically the technology features.

“No (it should not be called a motorway-style Expressway) because you’d be downgrading a motorway”

Participant, Nottingham

“Don’t call it a motorway because people would think it has three or four lanes”

Male, Warrington

“Expressways cries out for its own identity...the colour tells you what road it is without reading it”

Participant, Warrington

“I think it would be seen as a different kind of road, especially if it’s new and people would be talking about it, I think it would be thought of differently”

Female, Bath

There was a view that the rules of the road would help guide whether it was more like an A road or more like a motorway.

“Until you know precisely what the rules would be...if they fit with the current rules for something else call it that, but if they don’t then you’d have to have a third category”

Male, Nottingham

“I’d like to see what it looked like to be honest (in real life). If it’s linking one motorway to another then stick with the same brand, it’s basically a motorway”

Male, Bath

Motorways are held in high regard by some members of the public – they are seen as the most advanced roads in the country. Therefore, referring to ‘motorway style Expressways’ diluted this status.

“No, it shouldn’t (be called motorway-style Expressways) because you’re downgrading motorways and that’s something different”

Male, Nottingham

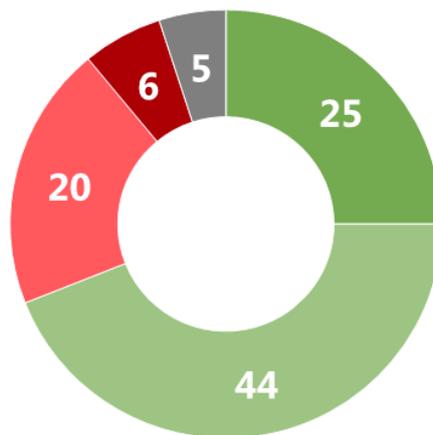
7.3 Importance of different coloured road signs

SRN users were asked how important they believe it is for Expressways to have their own colour sign in order to distinguish them from the current blue used for motorways and green for A roads. Seven in ten (69%) believe that it is important for the signs to have their own colour whilst one quarter (25%) did not feel it was important.

Figure 7.3:

Q13. How important, if it all, do you think it is for the type of road which you have just read about to have their own colour of signs in order to distinguish them from motorways (blue) and A Roads (green)?

■ % Very important ■ % Fairly important ■ % Not very important ■ % Not at all important ■ % Don't know



Base: All drivers and passengers on SRN (2,005)

Source: Ipsos MORI

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Views remained fairly consistent looking at those with different driving patterns with minimal significant differences. Non-drivers were significantly more likely to have no opinion at all on new coloured signs for Expressways, with over one in ten saying they don’t know (11% v 5% overall). Those who use the SRN for commuting were significantly more likely to say that different colour signs are very important (28% v 25% overall) whilst those who use the SRN for business purposes are significantly more likely to say not at all important (8% v 6% overall).

Female SRN users were significantly more likely to place importance on the colour of signs with almost three in ten (29% v 25% overall) saying this was very important. Male SRN users on the other hand were of the opposite opinion, with one in ten (9% v 6% overall) stating different coloured signs were not at all important. Those in the West Midlands were

significantly more likely to place a greater degree of importance on Expressways having different coloured signs, with one third (33% v 25% overall) saying this is very important.

The **Get Me Theres** were less likely to place importance on distinguishable signs with one in ten (9% v 4% overall) saying this was not at all important. In contrast, the **Tell Me Mores** were positive of the idea of using different colours with three quarters (75% v 69% overall) saying this was important.

In the focus groups, opinion was split as to whether new road signs/road colour designation is necessary. Opinion was grounded in whether the 'rules of the road' are going to change.

"If you're changing all the A roads you can change the A road rules, but if you're not changing all the A roads and they've got new rules then change the colour of the signs"

Female, Nottingham

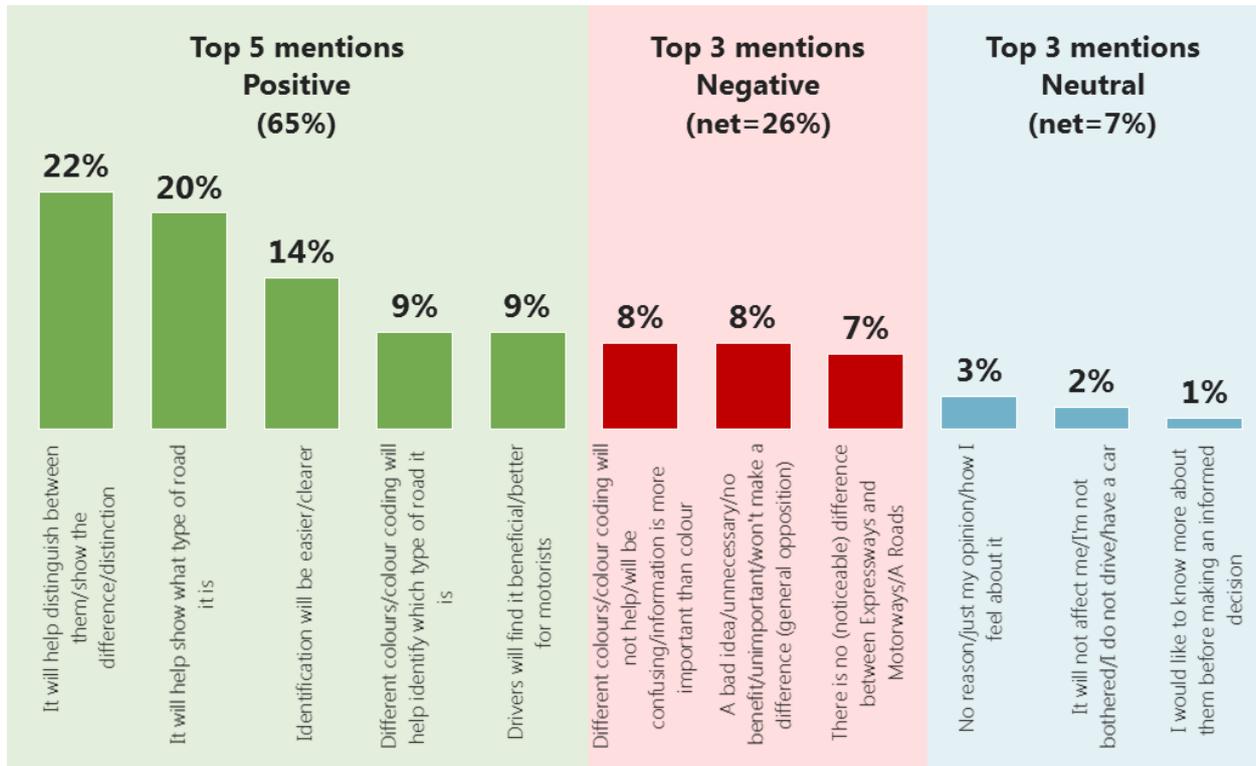
"If someone was to say to me 'to get to this place you need to get onto the Expressway', you'd need to be able to recognise what the Expressway was, rather than saying 'actually that's an A road, what is it?' You therefore need a different colour"

Female, Warrington

Those who had an opinion of the different coloured signs were asked to elaborate on their answer. The majority of those who had an opinion towards Expressway signs were positive in their response with comments revolving around helping to show the signs are different (22%), helping to show the type of road (20%), colour coding helping identifiability (9%), and being beneficial to motorists (9%). One quarter responded negatively to the question including comments concerning different colours causing confusion (8%), generally not making any difference (8%), and no noticeable difference between the roads (7%). Under one in ten (7%) provided a neutral response including no reason at all being given (3%), it will not affect me (2%), and wanting more information (1%).

Figure 7.4:

Q14. Why do you say that?



Base: All who have an opinion towards Expressways signs (1,815)

Source: Ipsos MORI

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Intriguingly it is non-drivers who were significantly more likely to mention the identification will be easier in their response (20% v 14% overall). Those who felt confident on both motorways and A roads were significantly more likely to include in their response that the different coloured signs will help show what type of road it is (21% motorways and A roads v 20% overall).

Female respondents were significantly more likely than male respondents to mention the different coloured signs would help distinguish between them in their response (25% Female v 19% Male) whereas Male respondents were significantly more likely than Female respondents to be negative, mentioning different colours will not help/be confusing (10% Male v 7% Female). Those in East of England and the South East were critical in their comments, significantly more likely to say there is no noticeable difference between the roads (11% East of England and 10% South East v 7% overall).

The **No Strong Views** were significantly more likely to be neutral in their response (13% v 7% overall) but were significantly more likely to not provide a reason for their neutrality (7% v 3% overall). The **Get Me Theres** were significantly more likely to have negative comments in their response (31% v 26% overall), also significantly more likely to say that the different colour signs will not help/be more confusing (12% v 8% overall).

Technical report

8 Technical report

8.1 Structure of qual events

The qualitative aspect of the project took the form of three focus group events, each held in a different location in England between the 7th and 16th March 2017. The locations chosen for these events were Warrington, Nottingham and Bath. These locations were carefully selected based on the criteria below:

- They are locations that represent views from SRN users in the north, south and midlands.
- They are major urban areas that are connected primarily by the SRN.
- Whilst they are heavily populated areas, they are situated on the periphery of major cities, so participants were more likely to use the SRN than exclusively public transport.
- They were areas that were not in close proximity to roads already known as 'Expressways', to avoid confusion.

The focus groups were three hour sessions, with 20 members of the public recruited to take part in each location. Participants were recruited based on specific quotas, including age, gender, ethnicity and social grade. In addition, there were some more context-specific quotas such as those who drive, other road users, and those with various degrees of confidence driving on the SRN. These quotas are detailed in the table below.

Quotas set	Number of participants required
Males & females	50/50 split
Age	A mix of all age groups 18+
Car drivers	A minimum of 10
Other road users (non-car drivers)	A mix of different road users, excluding HGV/LGV drivers
Driving confidence	A mix of those who are confident and not so confident.
Ethnicity: BME	A minimum of two
Social grade	A broad mix of social grades

8.2 The structure of the quantitative survey

The quantitative survey took the form of a 10-15-minute online questionnaire. The respondents eligible to take part were adults aged 18+ who are on the Ipsos MORI online panel, a platform which allows members to have their say on a variety of topics. The fieldwork dates for which the survey was available were between the 14th and 25th April, with 2,005 completed interviews achieved.

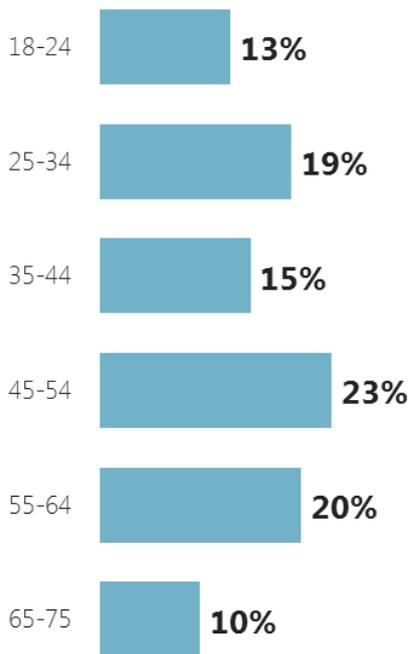
8.3 Demographics of the quantitative survey

Quotas were set by age, gender, region, working status and social grade to ensure results were representative of the population in England. The representativeness of the final data meant that no weighting was required.

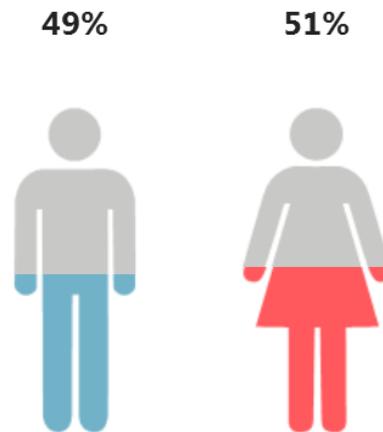
The table below outlines the profile of the final data:

Figure 8.1: Age and gender

S1. Age



S2. Gender



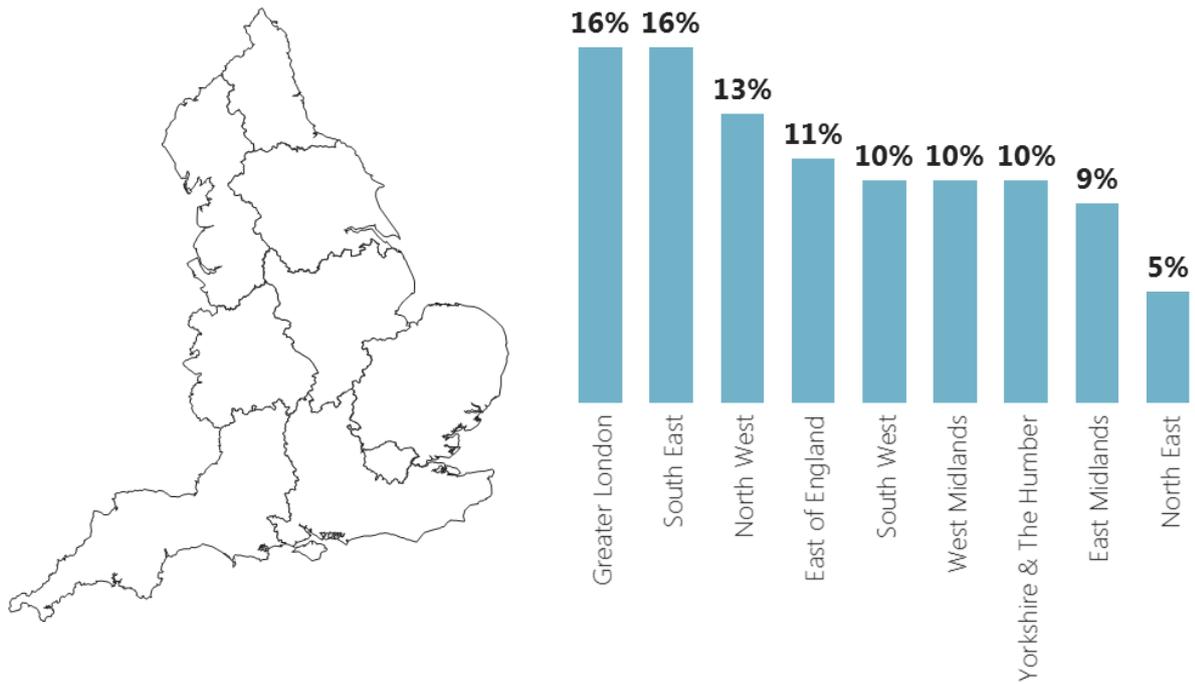
Base: All adults aged 18+ (2,005)

Source: Ipsos MORI

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Figure 8.2: Region

S3. Region



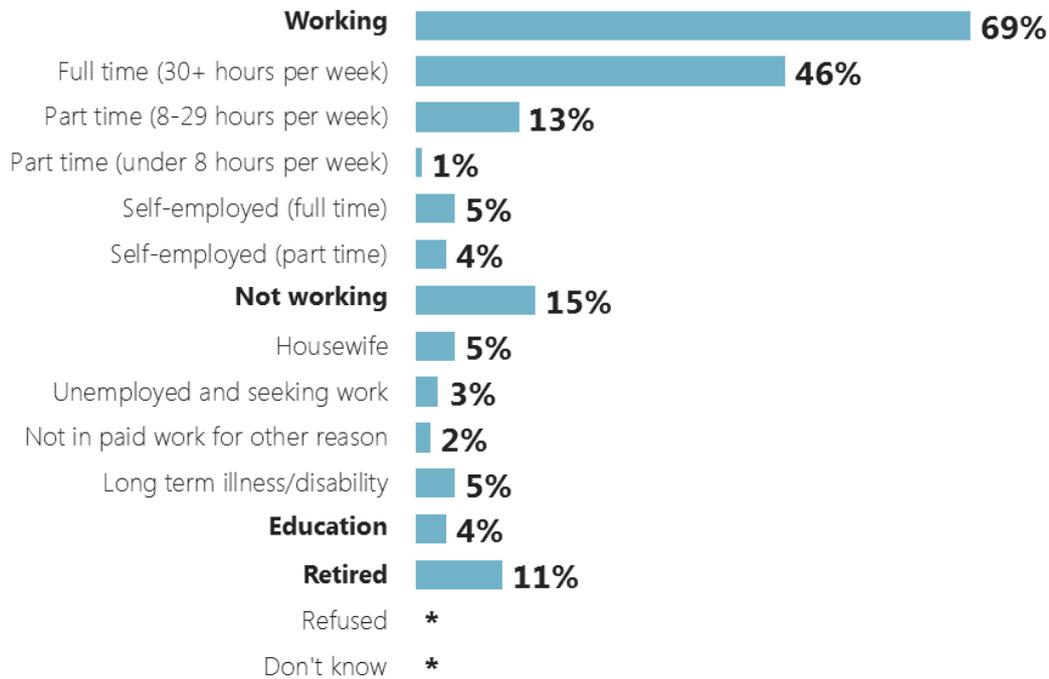
Base: All adults aged 18+ (2,005)

Source: Ipsos MORI

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Figure 8.3: Working status

D1. Working status



Base: All adults aged 18+ (2,005)

Source: Ipsos MORI

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8.4 MaxDiff methodology

Maximum Difference scaling, also known as Max Diff, is a widely-used approach in the analysis of choice data. For Highways England, Max Diff was employed to understand the most relevant features of Expressways for the general population.

Max Diff requires people to discriminate between the most and the least important features of a particular feature. Best/worst scales produce a ranking that is not affected by the lack of discrimination usually determined by multiple points scales (i.e. respondents only choosing the middle code). On the other hand, culture may also be a source of bias, in fact respondents use scales differently, such as mainly choosing the top or the bottom of the scale. For these reasons best/worst scaling delivers a stronger discrimination among items and clearer insights.

Through maximum likelihood estimation, Max Diff generates raw utilities, that are rescaled for easiness of interpretation. These scores are transformed so that they sum to 100, in this way a score of 4 can be interpreted as twice preferred as a score of 2. Maximum likelihood estimation is a statistical method that permits estimation of the value of a specific parameter by maximizing the probability of obtaining the observed data. In this example, maximum likelihood estimates the utilities associated to each feature by calculating the highest probability that a respondent will choose an item as “the most important”.

Utilities can be defined as a measure of relative desirability or worth associated to each feature for every respondent in the sample. The higher the utility, the more likely the item is to be chosen as most important (and not chosen as least important). The utilities are then averaged over the whole sample and ranked from the largest to the smallest. The average utility ranking represents the relative importance of each feature compared to the others.

Appendices

9 Appendices

9.1 Quantitative questionnaire

INTRODUCTION

This survey has been commissioned by Highways England, the government-owned company responsible for managing the Strategic Road Network (SRN) in England. The SRN is made up of motorways and trunk roads, which are the most significant A-roads (single or dual carriageways).

The survey will take no longer than 10-15 minutes to complete.

All of the information collected will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual in the results.

INTRODUCTION/SCREENER QUESTIONS

ASK ALL

SA

S1. What was your age at your last birthday? Please select one answer only.

1. 18-24
2. 25-34
3. 35-54
4. 55-75
5. Prefer not to say – [THANK AND CLOSE](#)

ASK ALL

SA

S2. How would you describe yourself? Please select one answer only.

1. Male
2. Female
3. Other
4. Prefer not to say

ASK ALL

O/E

S3. What is your postcode? Please write in.

[[OPEN ENDED TEXTBOX](#)]

1. Prefer not to say – [THANK AND CLOSE](#)

1. North East
2. North West
3. Yorkshire and The Humber
4. West Midlands
5. East Midlands
6. East of England
7. South West
8. South East
9. Greater London

UNDERSTANDING SRN BEHAVIOUR

ASK ALL

SA

S4. How frequently, if at all, have you personally driven on the Strategic Road Network in England in the past 12 months? Please select one answer only.

(Click [here](#) to see a map of roads, which form the Strategic Road Network).

1. 5 or more days a week
2. 2-4 days a week
3. 1 day a week
4. Less than 1 day a week but more than 2 days a month
5. 1-2 days a month
6. Less than 1 day a month but more than 2 days a year
7. 1-2 days a year
8. Not driven on Strategic Road Network in last 12 months
9. Don't know

ASK IF NOT DRIVEN ON THE SRN OR DON'T KNOW CODE 8-9 AT S4
MA

S5. Have you travelled on the Strategic Road Network in the last 12 months as...? Please select all the answers that apply.

1. a passenger in a car
2. a passenger in a van
3. a passenger in a bus or coach
4. a cyclist or pedestrian
5. None of the above [SINGLE CODE] – THANK AND CLOSE
6. Don't know [SINGLE CODE] – THANK AND CLOSE

ASK ALL DRIVERS AND PASSENGERS ON SRN (S4 CODES 1-7 OR S5 CODES 1-4)
MA

Q1. Which type of vehicle or vehicles have you driven or been a passenger in on the Strategic Road Network during the past 12 months? Please select all the answers that apply.

1. Four-wheel car (includes Multi-Purpose Vehicles and people carriers)
2. Four-wheel drive passenger vehicle (e.g. Land rover, Jeep or similar)
3. Three-wheel car
4. Campervan, motor caravan, dormobile, motorhome or vehicle which was towing a caravan
5. Minibus
6. Light van (no side windows behind driver, includes pick-ups and car based vans)
7. Some other type of van or lorry (includes heavy goods vehicle)
8. Coach or bus
9. Motorcycle with sidecar/scooter with sidecar
10. Motorcycle/scooter/ moped
11. Bicycle
12. Horse/horse and cart
13. Some other vehicle (Please specify)
14. Don't know [SINGLE CODE]

ASK ALL

SA PER ROW

Q2. Do you ever travel on the Strategic Road Network as...

Please select one answer per row.

DOWN SIDE OF GRID

1. **part of your usual commute/your trip to and from work?**
2. **part of your job or for business purposes that excludes your usual commute/ your trip to and from work?**

ACROSS TOP OF GRID

1. Yes
2. No
3. Don't know

SA PER ROW

Q3. And to what extent are you personally confident or not when driving on each of the following types of road in England? Please select one answer per statement.

REVERSE SCALE (CODES 1-4) FOR HALF SAMPLE. RANDOMISE ORDER OF STATEMENTS.

DOWN SIDE OF GRID

- a) **Motorways**
- b) **A-roads**

ACROSS TOP OF GRID

1. Very confident
2. Fairly confident
3. Not very confident
4. Not at all confident
5. Don't know

SA PER ROW

Q4. Thinking about A-roads in England, how satisfied or dissatisfied are you with each of the following... Please select one answer per statement.

REVERSE SCALE (CODES 1-5) FOR HALF SAMPLE. RANDOMISE ORDER OF STATEMENTS.

DOWN SIDE OF GRID

- a) **Traffic levels and congestion**
- b) **Safety on roads**
- c) **The condition of roads**
- d) **The provision of information (e.g. on signs) during journeys**
- e) **Levels of traffic pollution**
- f) **Management and maintenance of roads**
- g) **Roadside environment/aesthetics**
- h) **The number of rest areas to stop at during longer journeys**
- i) **Journey times**

ACROSS TOP OF GRID

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know

ASK ALL

SA

Q5. Before today, had you heard of the term 'Expressway'? Please select one answer only.

1. Yes
2. No

ASK ALL WHO SAY YES AT Q5 (CODE 1)

Q6. What do you understand by the term 'Expressway'?

Please write in

[OPEN ENDED TEXTBOX]

EXPRESSWAYS

NEW SCREEN

Highways England is planning to upgrade A-roads on the Strategic Road Network. It is likely to involve the upgrading of existing single and dual carriageways with additional design, safety and technology features (although in some instances it may be a new road). They will be well-designed and offer the same standard of journey to road users as motorways at the national speed limit (70mph). The new roads will use technology (like electronic signs) to manage traffic and provide better information to drivers. All junctions will be of a motorway-style (i.e. with a slip-road) to allow easier entry and exit from the new road. Non-motorised users (such as cyclists) will not have access to these roads, but alternative provisions will be provided.

We'd now like to ask some questions about these upgrades to A-roads.

ASK ALL

SA

Q7. Thinking about the description you have just read, to what extent do you agree or disagree that 'Expressway' is a suitable term for this new type of A-road? Please select one answer only.

REVERSE SCALE (CODES 1-5) FOR HALF SAMPLE.

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know

NEW SCREEN

As explained earlier, an Expressway will be an A-road which is well designed and offers the same standard of journey to customers as motorways, but which differs from standard A-roads in a number of other ways.

ASK ALL

SA

Q8. Knowing what you now know about the concept, to what extent are you favourable or unfavourable towards Expressways? Please select one answer only.

REVERSE SCALE (CODES 1-5) FOR HALF SAMPLE.

1. Very favourable
2. Fairly favourable
3. Neither favourable nor unfavourable
4. Fairly unfavourable
5. Very unfavourable
6. Don't know

ASK ALL EXCEPT THOSE WHO ANSWER DK AT Q8 (CODE 6)

Q9. Why do you say that? Please write in

[OPEN ENDED TEXTBOX]

MAX DIFF MODULE

ASK ALL

Q10. Which of these features of an Expressway is MOST essential and which is LEAST essential for you when driving on this new type of road?

1. Dual carriageway road throughout, with two or three lanes in each direction
2. Emergency refuge areas, which are lay-bys located next to the carriageway at regular intervals for vehicles to stop in an emergency
3. Signs to say that you have joined or left an expressway
4. Cameras (CCTV) to detect and help clear incidents more quickly
5. Motorway-style junctions to make joining and leaving the road easier
6. No right turns which force a driver to cross the opposite carriageway (exits will always be via a junction on the left hand side)
7. No direct access on to the expressway from houses or fields (access will always be via a junction where the road merges in from the left hand side)
8. An environmentally friendly design that is sensitive to the surrounding landscape of the route (e.g. air quality, wildlife, noise)
9. Exclusion of slow moving vehicles (e.g. tractors), pedestrians and cyclists, who will be provided with alternatives such as pedestrian/cycle routes, bridges or underpasses
10. The availability of road service areas to allow drivers to take a break
11. Signs which give users sufficient warning of upcoming junctions and which include clear destination and route information
12. Motorway-style numbered junctions and driver location signs
13. Electronic signs, which display information about hazards, accidents, slowing traffic, or other useful messages
14. Technology to automatically detect when traffic begins to become congested and sets a variable speed limit on electronic signs to control flow
15. The presence of Traffic Officers
16. Concrete barrier in the central reservation, which prevents vehicles from crossing over to the opposite carriageway

EXPRESSWAYS CONTINUED

ASK ALL
SA PER ROW

Q11. To what extent do you agree or disagree with the following statements about Expressways? Please select one answer per row

REVERSE SCALE FOR HALF SAMPLE. RANDOMISE LIST OF STATEMENTS.

DOWN SIDE OF GRID

1. I believe Expressways will improve the reliability of journeys I make using this type of road
2. I don't believe Expressways will be any safer than other A-roads
3. The extra information provided about journey times on Expressways will be helpful to me
4. I don't believe Expressways will help to resolve bottlenecks/reduce congestion
5. I believe Expressways will help to promote the economic growth of towns that are currently situated away from the motorway network
6. Expressways will help support national economic growth
7. I believe Expressways will be safer for cyclists and pedestrians by using alternative provisions (e.g. bridges or underpasses)

ACROSS TOP OF GRID

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know

ASK ALL
SA

Q12. Which of the following statements best describes your opinion towards the type of road which you have just read about? Please select one answer only.

1. These roads are like A-roads, but should be called Expressways to differentiate them
2. These roads are like motorways, but should be called Expressways to differentiate them
3. These roads are fundamentally just like existing A roads and should not be called anything different
4. These roads are fundamentally just like motorways and should not be called anything different
5. These roads are something different altogether (i.e. not like an A road or motorway) and should be called something other than Expressways

ASK ALL
SA

Q13. How important, if it all, do you think it is for the type of road which you have just read about to have their own colour of signs in order to distinguish them from motorways (blue) and A-roads (green)? Please select one answer only.

1. Very important
2. Fairly important
3. Not very important
4. Not at all important
5. Don't know

ASK ALL WITH AN OPINION CODES 1-4 AT Q12

Q14. Why do you say that? Please write in

[OPEN ENDED TEXTBOX]

ASK ALL

Q15. What do you understand by the term 'environment' when thinking about the construction of new roads? Please write in

[OPEN ENDED TEXTBOX]

DEMOGRAPHICS

ASK ALL

SA

D1. Which of these applies to you? Please select one answer only.

1. Have paid job - Full time (30+ hours per week)
2. Have paid job - Part time (8-29 hours per week)
3. Have paid job - Part time (Under 8 hours per week)
4. Not working - Housewife
5. Self-employed (full time)
6. Self-employed (part time)
7. Full time student
8. Unemployed and seeking work
9. Retired
10. Not in paid work for other reason
11. Not in paid work because of long term illness or disability
12. Refused
13. Don't know

D2. Social grade [FROM PANEL]

THANK AND CLOSE

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