

National Road Users' Satisfaction Survey 2015-2016



Executive summary

National Road Users' Satisfaction Survey

The National Road Users' Satisfaction Survey (NRUSS) provides information that enables Highways England to understand customer satisfaction of users of the Strategic Road Network (SRN).

- The overall Key Performance Indicator (KPI) which monitors customer satisfaction increased to **89.32** in the 2015-16 survey (**from 88.51 in 2014-15**); the first increase in the last five years.



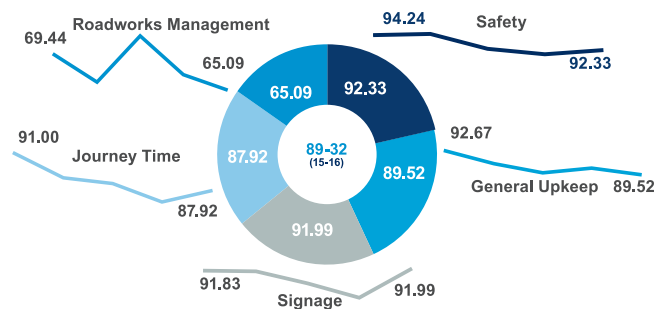
- The KPIs for both motorways and trunk roads have **increased** since the transition from the Highways Agency to Highways England in April 2015.
- KPIs in the M25 and South West regions are **higher** than at any time since 2011.
- The KPIs for roadworks management and general upkeep have decreased slightly, but have **increased** for:

- Long stretches of roadworks on motorways with **50mph** speed restrictions in place (e.g. to create smart motorways) cause **frustration** to drivers.

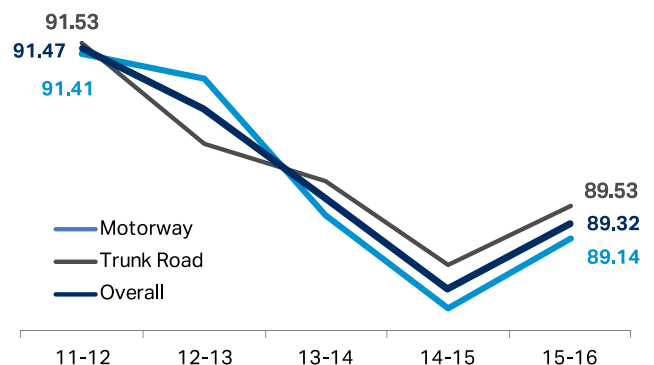
“Delays which have been going on for over a year with 50mph speed restriction slowing us down”

- Even though they may not perceive their journeys to be delayed, some customers can be dissatisfied with their journey time because they are unable to travel at their desired speed (i.e. 70mph).

“We wanted to go miles faster than 50mph”



5 year trends



Safety **+0.51**

Journey Time **+0.91**

Information Provision **+2.99**

- For **time critical** journeys, the average time allowed exceeds the average delay, ensuring most people still arrive on time, and satisfaction with journey time is **80% or above**.



National Road Users' Satisfaction Survey

The KPI has increased as a result of the following changes in the journey experience reported by customers since 2014-15:

- ✓ Fewer frustrated and stressed by delay
- ✓ Fewer experienced speed restrictions, but where encountered, they caused frustration
- ✓ Fewer nervous drivers and passengers
- ✓ Fewer felt annoyed, intimidated or unsafe because of the poor driving of others

Negative impacts on the KPI arose from:

- ✗ More people seeing litter on trunk roads
- ✗ Fewer seeing roadworks in progress when passing through roadworks
- ✗ Fewer seeing effective explanations of roadworks

Customer priorities for improvement...

- 1 **Maintain surfaces to a high standard (23%, increased from 14%)**
- 2 **Minimise time taken to undertake roadworks (15% from 12%)**
- 3 **Greater investment in SRN (11%, previously 7%)**

Example comments about the SRN in general include:

"The condition of the road is a priority to keep traffic flowing"

"They need to prioritise the roadworks, make information clear about what they are doing and not have miles of coned off roadworks with nothing going on"

"Safety on the road should always be the key priority"

Create positive impression of roadworks through informative signage showing progress to date, reasons for work and located in advance of the works

Lift 50mph speed restrictions when traffic volumes are low: help prevent delays and frustration they cause

Recommendations to positively influence KPI's

Reduce litter through identifying black spots, especially on the trunk roads

Improve customer confidence with greater police and traffic officer visibility

National Road Users' Satisfaction Survey

As part of the objective to seek and respond to feedback from customers, Highways England (formerly the Highways Agency to April 2015) commissions a number of surveys. This includes a Road Users' Satisfaction Survey to monitor awareness and satisfaction amongst network users.

The objectives of the National Road Users' Satisfaction Survey (NRUSS) are to:

- **Monitor** the Key Performance Indicator (KPI) based on the last journey made on the Strategic Road Network (SRN).
- **Understand** the causes of satisfaction and dissatisfaction with use of the SRN and Highways England services.

The current approach to measuring satisfaction was introduced in April 2011 following a research programme to identify the factors that were important to customers. This report contains an analysis of the 2,027 interviews conducted between April 2015 and the end of March 2016.

Notes:

The NRUSS sample of journeys may not be representative of all journeys made on the SRN in terms of frequency and distance. For example, 10% of trips are commuting trips, and 9% business trips. The profile of journeys is similar each year, to enable trends in performance to be monitored.

Comparisons are made, where appropriate, with data collected in the previous four years. Note that no weighting is applied to the data. A copy of the questionnaire is included in Appendix A, and other appendices provide additional breakdowns of the survey results for reference.

Where results are significantly different at the 95% confidence level (that is, the results are not just due to chance), these are highlighted in the report and in the appendices. Throughout this report, figures reported are for NRUSS 2015-16 unless otherwise stated.

The 2015-16 year is the final year in which the National Road User Satisfaction Survey was carried out by Highways England. From March 2016 the survey will be conducted by the road user watchdog Transport Focus. NRUSS will ultimately be replaced with a new Strategic Roads User Survey currently being developed by Transport Focus.

1.1

Methodology and sampling

The methodology for NRUSS is at least 2,000 household interviews administered using computer assisted personal interviewing (CAPI). Sample points based on output area are randomly selected from across England so that there are an equal number in each of Highways England's 7 regions (see Figure 1.1).

To be eligible to take part in the survey, respondents must be aged 17 or over and have used the SRN at some time in the 12 months preceding the interview.

Four respondents from within each sample point are selected to quota to ensure respondents are broadly representative of adults in England who use the SRN.

One sample point (4 people) will have:

2 males



2 females

minimum 3 drivers

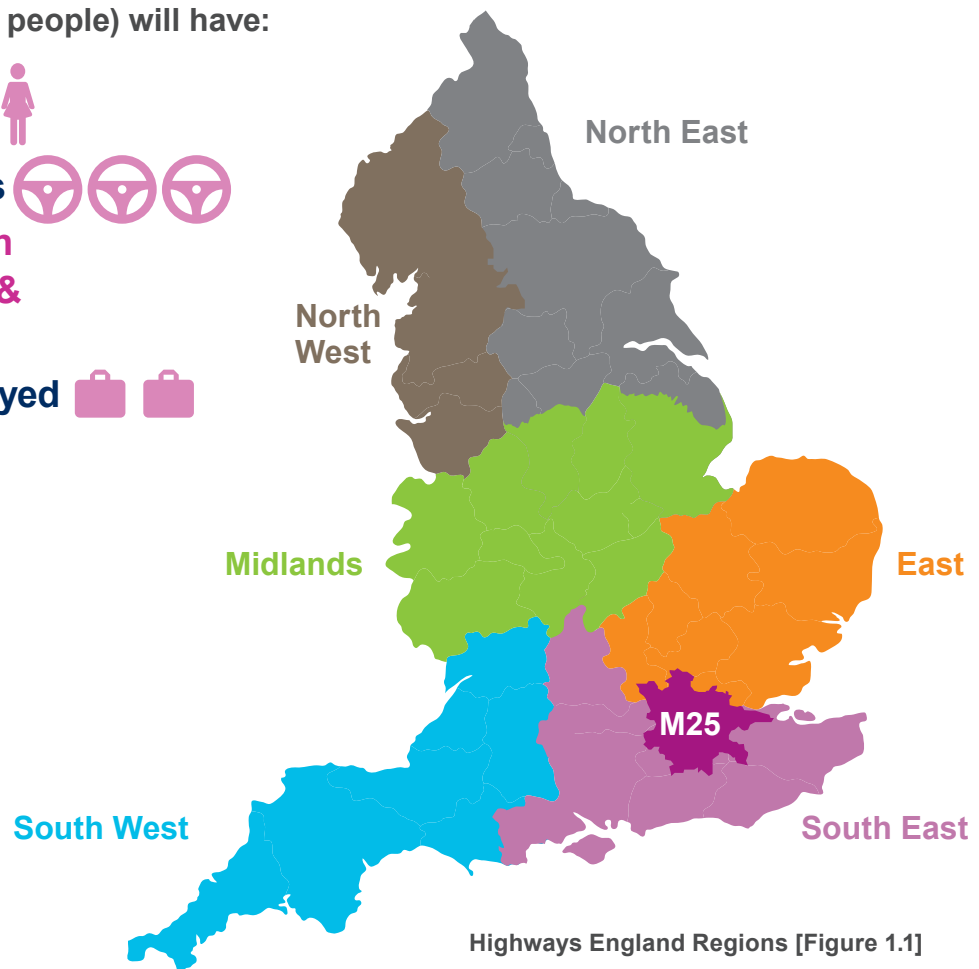


minimum 1 person

from 17-34, 35-64 &

65+ age groups

minimum 2 employed



1.2

Key performance indicator (KPI)

Tracking satisfaction with last journey

The KPI is calculated from satisfaction ratings for 5 key aspects of the most recent journey undertaken on the SRN by a sample of customers. The resultant figure represents satisfaction on a 0 to 100 scale¹. The direction (outward or return) of 'last journey' is selected randomly to ensure an even split.

¹ Appendix H provides detail on the calculation

1.3 Equality analysis

Impacts on customer groups

To enable Highways England to meet its general and specific equality duties (under Section 149 Equality Act 2010), 'equality analysis' has been conducted. For NRUSS, the user groups considered are age, race, gender and disability.

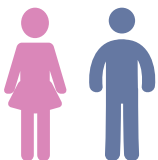
Analysis has shown that some variations exist in the travel characteristics of these groups, as follows:

65+

People aged 65+ travelled less frequently on the SRN than other age groups. Their usage of the network was predominantly for leisure rather than for work or business.

17-24

Higher proportions of those in the youngest age group travelled as car passengers than car drivers, and were least likely to have a driving licence (**14%** had neither a full nor provisional licence). This age group was the most likely to have access to new technology and use the internet for journey planning rather than paper maps.



In general, women travelled less frequently than men on the SRN and travelled fewer miles per year. When they did travel, they were significantly more likely to travel as a passenger in a car (**78%**) than men (**51%**).



Customers with a health issue affecting mobility were generally older and did not work. This resulted in less frequent use of the SRN, and fewer commuting and business journeys. They were less confident SRN users and more likely to feel unsafe from the perceived poor driving of others.

The characteristics of customers interviewed in 2015-16 were the same as those interviewed in previous years. Further details of the sample and travel characteristics can be found in the Equality Report. A breakdown of the results for the above user groups forms Appendix C of this report.

The analysis has shown that there are no equality issues arising from the NRUSS results.

Following this introduction, the drivers of customer satisfaction are explored in Section 2. In Sections 3 to 7, the components of the KPI and associated journey experiences are discussed. Section 8 provides other information collected in NRUSS relating to traffic officers, smart motorways and overall satisfaction with Highways England, together with customer feedback on the priorities for improvement.

Summary

 **89.32**

The KPI for 2015-16 of 89.32 represents a high level of satisfaction and has increased from 2014-15 (88.51) reversing a downward trend since 2011-12.

- Satisfaction has **increased** in most regions but continued to decline in the North East and East.
- There were **increases** in safety (+0.51), journey time (+0.91) and signage (+2.99), from 2014-15 but the KPI **declined** for:
 - Roadworks management (-1.86).
 - General upkeep (-0.86).

Both the motorways and trunk road KPIs increased, relative to 2014-15.

| KPI | 11-12 | 12-13 | 13-14 | 14-15 | 15-16 |
|----------------|--------------|--------------|--------------|--------------|--------------|
| Motorways | 91.41 | 91.10 | 89.43 | 88.27 | 89.14 |
| Trunk Roads | 91.55 | 90.31 | 89.87 | 88.81 | 89.53 |
| Overall | 91.47 | 90.73 | 89.63 | 88.51 | 89.32 |

- Short, incident free journeys score **highest**, achieving scores very close to the maximum of 100.
- **Delay** is the greatest cause of **dissatisfaction**, especially where it causes the customer to feel frustrated, annoyed or stressed.
- An encounter with roadworks where there is inadequate signage, no evidence of work in progress, speed restrictions and causes delay, impacts **negatively** on the KPI.

- Journeys made by nervous drivers and passengers result in a significantly **lower** KPI than for confident travellers, regardless of the journey features.
- The purpose of the journey itself also contributes to customer satisfaction; commuters are generally **less satisfied** than leisure travellers (but commuting journeys tend to be more affected by delay).

Motorways and trunk roads continue to be regarded more highly than local roads, although there is less of a gap in ratings between road types than in previous years.

| Road Ratings (1-10) | 11-12 | 12-13 | 13-14 | 14-15 | 15-16 |
|---------------------|-------|-------|-------|-------|-------|
| Local road | 7.12 | 7.14 | 6.78 | 6.72 | 7.18 |
| Trunk Road | 8.00 | 7.82 | 7.79 | 7.70 | 7.80 |
| Motorway | 8.13 | 7.98 | 7.89 | 7.85 | 7.73 |

2.1 Key performance indicators (KPIs) for last journey on SRN

Customers were asked to recall the most recent trip they had made using the SRN and provide details about the journey. This included the time, distance, purpose and user experiences on the journey, as well as aspects of journey planning and use of information.

The last journey is the basis of the KPI. Customers give satisfaction ratings on a 1 to 5 scale, where 1 is 'very satisfied' and 5 is 'very dissatisfied' for each of 5 journey aspects: safety², general upkeep, signage (information provision), journey time and roadworks management³.

For each aspect, the proportion of customers who are fairly or very satisfied represents the KPI for that aspect, for example, 88% of customers were satisfied with the journey time for their last journey on the SRN. Each of the 5 aspects contribute to the overall KPI, which takes account of both trunk roads and motorways where used.

Figure 2.1 shows the combined motorway and trunk road KPIs, and variation by year since 2011-12. The highest scoring factor in 2015-16 is safety (92.33), followed by signage (91.99), with roadworks management being the aspect with lowest satisfaction, at 65.09 (compared with 91.81, 89.00 and 66.95 in 2014-15).

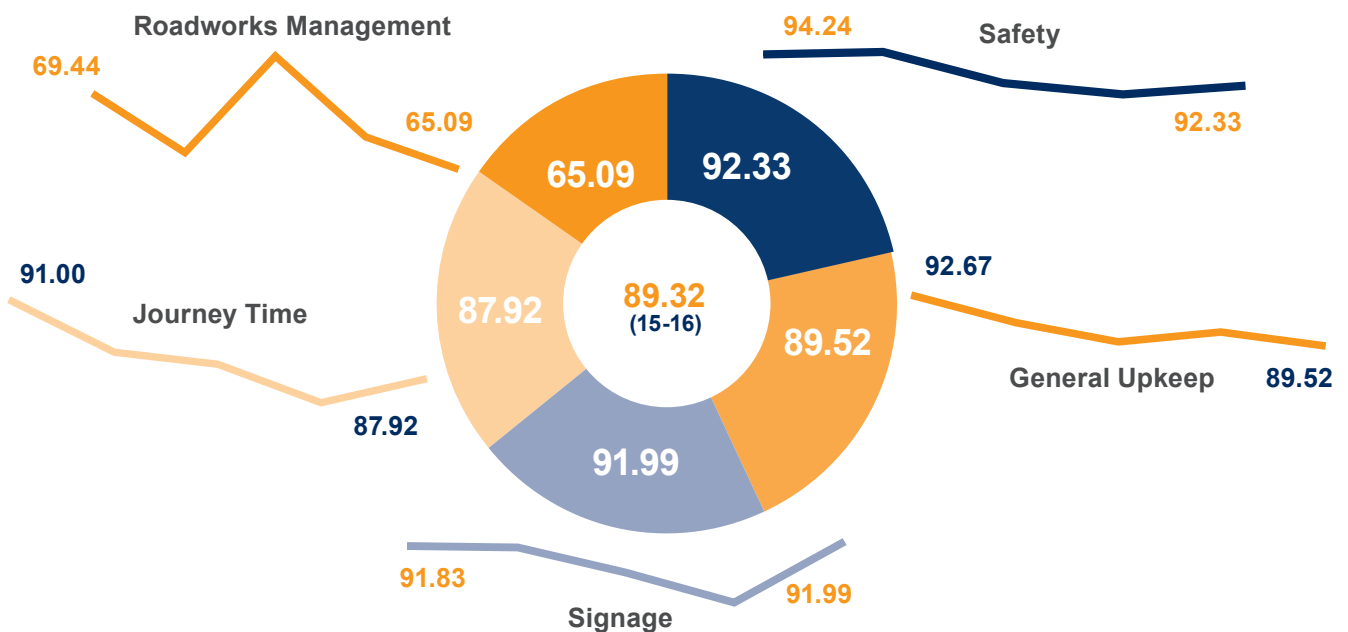
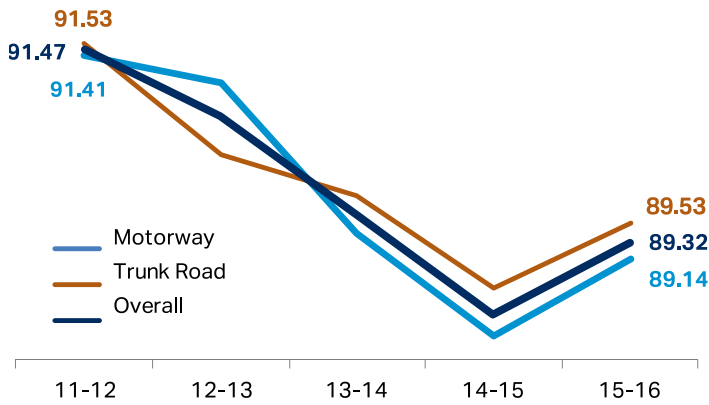


Figure 2.1 KPI by year (11-12 to 15-16)

² Instead of 'satisfaction', the scale for 'safety' records 1 for 'very safe' to 5 'very unsafe'

³ The score for roadworks management is only included for the 614 respondents who did encounter roadworks on their journey



The overall KPI has increased from 88.51 in 2014-15 to 89.32 in 2015-16. The component KPIs for motorways and trunk roads have also both increased, to 89.14 and 89.53 respectively.

Figure 2.2 KPI by year

For 2015-16, the KPI for all journeys was 89.32 (88.51 in 2014-15), which indicates a high level of satisfaction and the first increase in the last five years.

2.2 KPI trends

Over the last year, the KPI has increased in five of the seven Highways England regions, most notably in the South West region (from 89.41 to 91.10) as shown in Figure 2.3.

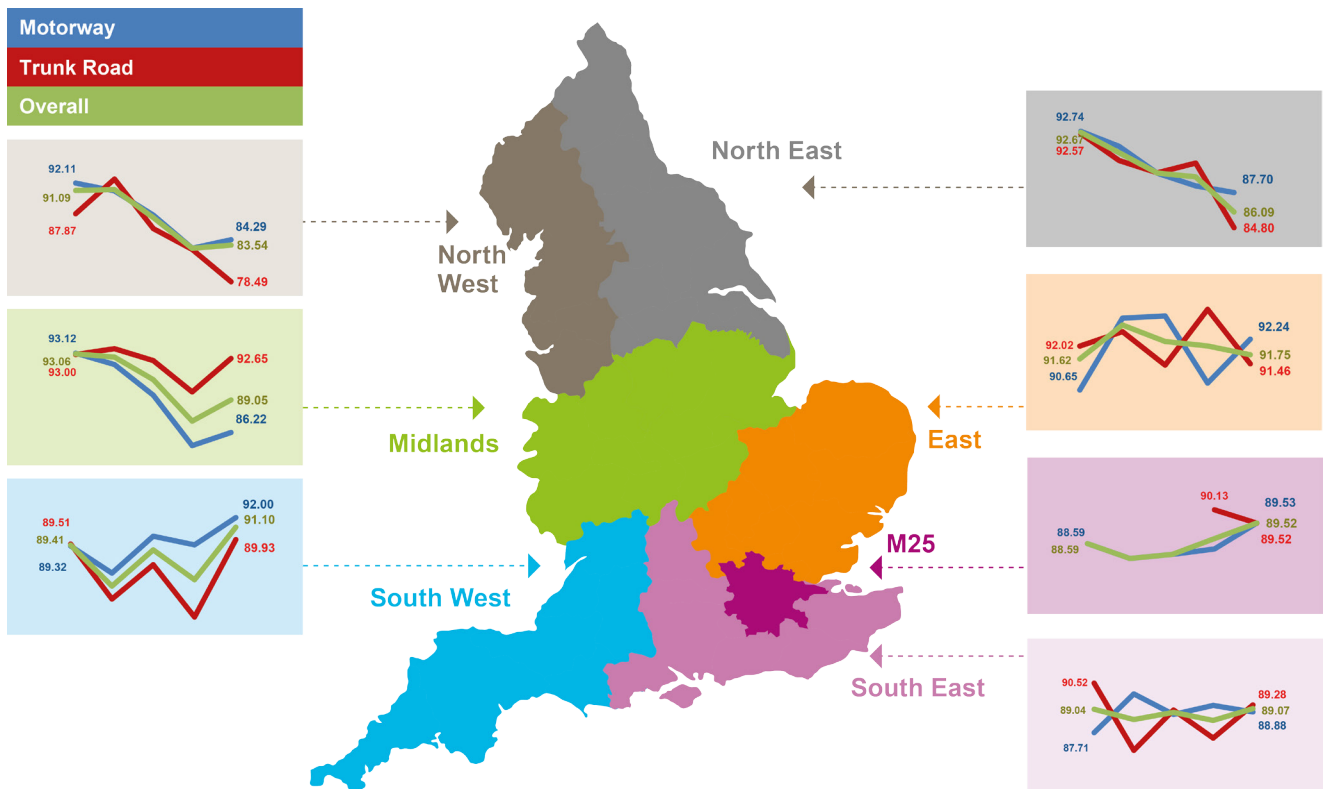
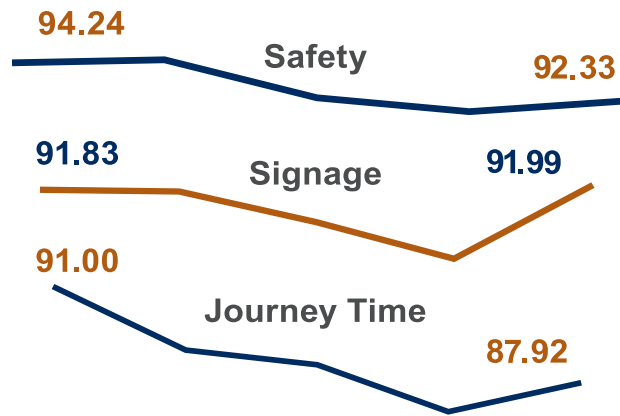


Figure 2.3 KPI by region of travel by year
Note: Prior to 2014-15 M25 region included M25 motorway only

Compared to 2014-15, the overall journey aspect KPIs have decreased slightly for roadworks management and general upkeep, but have increased for safety, journey time and information provision.



2.3 Last journey: perceptions of the SRN and local roads

To compare perceptions of the SRN and local roads, respondents were asked, on a scale of 1 to 10, how they would rate their most recent journey by road type (1 being extremely poor and 10 extremely good).

The average ratings given each year by customers are shown in **Figure 2.4**. While motorways and trunk roads compare favourably with local roads, the gap has narrowed slightly from 2014-15, with an increase of 0.46 for local roads (from a five year low of 6.72), and a decrease of 0.12 for motorways.

This increase has been observed across the sample, in each region and by all demographic groupings. For the first time, the trunk road rating exceeds that of motorways.

The motorway score has declined over the past five years in all regions. Following a long term downward trend, the trunk road score has increased in comparison with last year in all regions, except the North East and North West when both road types had been used on the last trip.

As in previous years, comments from respondents indicate that low scores for all road types were associated with:

- Traffic congestion
- Potholes
- Poor road surfaces
- Roadworks

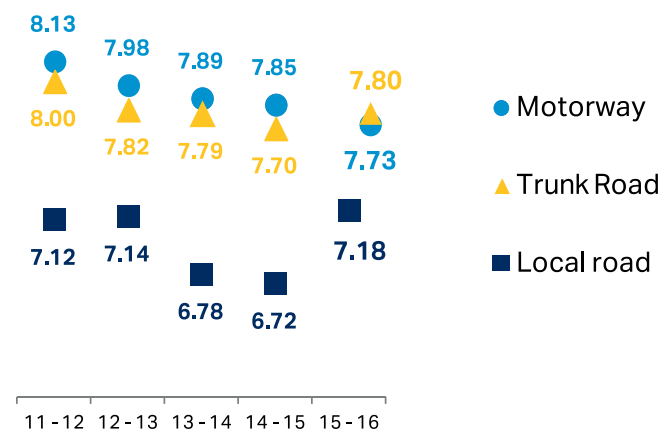


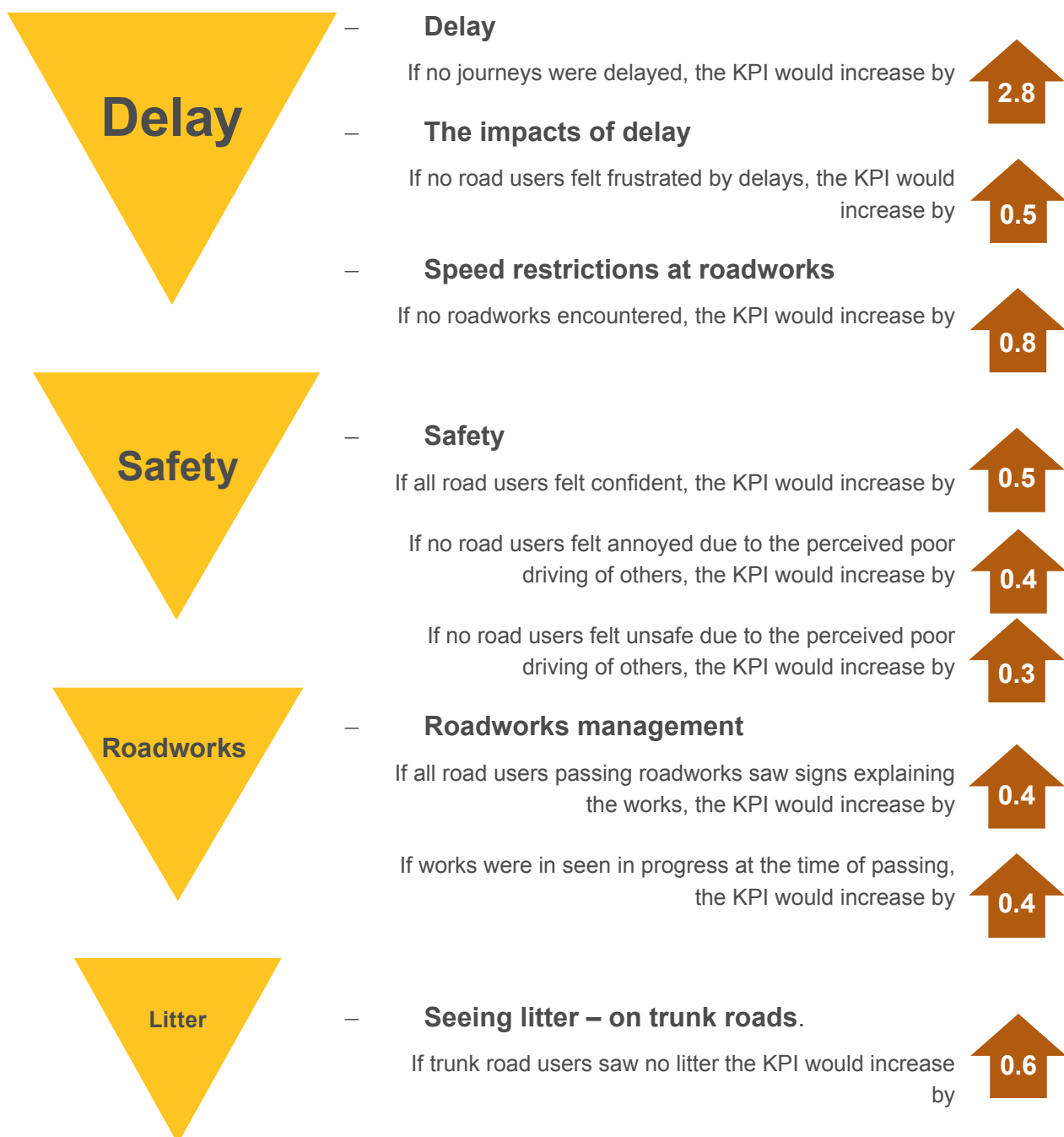
Figure 2.4 Rating of road type used on most recent journey (1-10 scale)

2.4 KPI forecasting customer satisfaction

Regression analysis⁴ has been conducted on the 2015-16 NRUSS data. This identifies the key drivers of satisfaction. The factors produced can be used to estimate the likely impact on the KPI arising from future changes in the reported journey experience.

For example, reduced proportions of journeys with delay will lead to an increase in the KPI, and more road users feeling unsafe will decrease the KPI.

The factors with the most significant positive influence on customer satisfaction are shown below, together with the potential change from the current KPI of 89.32.



⁴ For details, please see Appendix I

The KPI increased in 2015-16 due to there being fewer respondents who:

- were frustrated or stressed by delays
- saw speed restrictions in place at roadworks
- were not confident
- felt unsafe, intimidated or annoyed due to other people's driving

Conversely, slightly fewer saw works in progress at roadworks and a higher proportion saw litter on trunk roads in 2015-16 than the previous year.

While experiencing delay is one element, the effect of this delay (e.g. frustration or stress) is also important. Similarly, whilst some respondents may see examples of poor driving, this might not affect the KPI unless they felt annoyed, unsafe or intimidated by such behaviour.

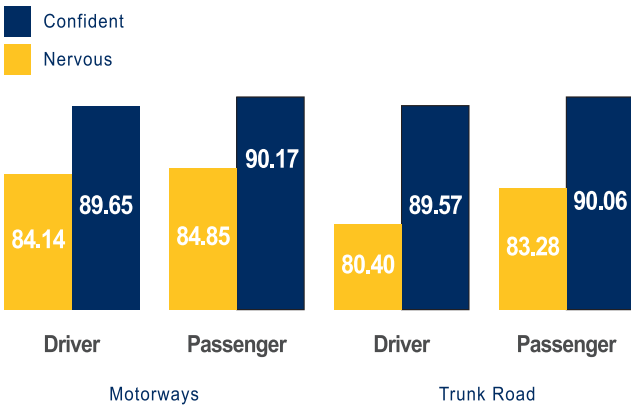


Figure 2.5 Performance measure for confident and nervous customers

Confidence as a road user is another important determinant; the KPI for nervous drivers and passengers is lower. For example, the KPI for confident passengers using trunk roads is **90.06** compared with just **83.28** for nervous passengers. However, it is only a minority of customers who describe themselves as very or fairly nervous. For example, **6%** said they were nervous driving on motorways compared to **90%** who were confident. Females, young drivers and customers with a mobility impairment are more likely to be nervous than others.

For a comparable journey in terms of delay, length and purpose, confident customers are more satisfied with the SRN than nervous customers.

Last journey: experiences and satisfaction with journey time

Summary

High proportions of customers were satisfied with journey time on their last journey; **86%** of motorway customers, and **90%** of trunk road customers were satisfied.

Satisfaction increased for trunk roads in 2015-16 for the first time in five years, while the motorways score continued to decline.

| KPI | 11-12 | 12-13 | 13-14 | 14-15 | 15-16 |
|----------------|--------------|--------------|--------------|--------------|--------------|
| Motorways | 90.59 | 88.06 | 87.53 | 86.06 | 85.99 |
| Trunk Roads | 91.39 | 90.03 | 89.59 | 88.14 | 90.00 |
| Overall | 91.00 | 88.98 | 88.51 | 87.00 | 87.92 |

Volume of traffic remains the primary cause of delay on the SRN; **17%** overall:

- **10%** where just trunk roads were used
- **18%** where just motorways were used
- **24%** where both roads were used

Fewer were delayed by **congestion** in 2015-2016 compared with 2014-15 (12%, 21% and 26%).

Delays due to **roadworks** affected **12%** of journeys on the SRN in 2015-2016:

- **5%** where just trunk roads were used
- **12%** where just motorways were used
- **21%** where both roads were used

While similar to 2014-15, these proportions have increased since 2011-12 (4%, 8% and 9%).

In spite of the delays encountered, satisfaction with journey time is high:

- **80%** for motorways for commuters and business travellers making time critical journeys

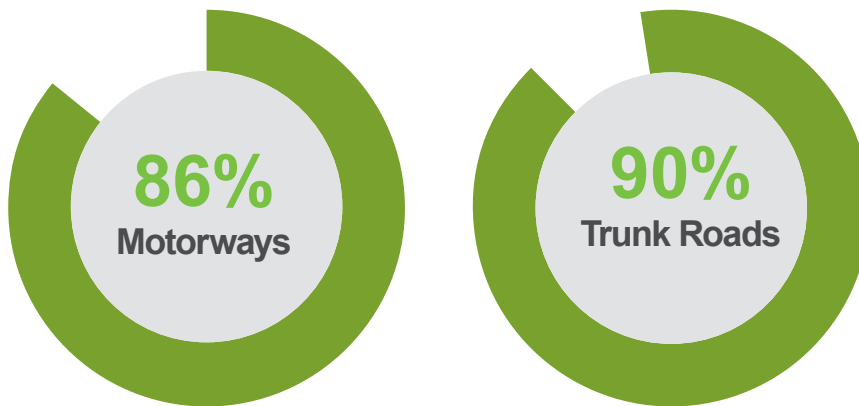
Compared with 2014-15, there are fewer in 2015-16 who:

- checked travel conditions in advance of making the journey, **10%**
- allowed extra time for the journey, **13%** (with an average 32 minutes extra time allowed compared to 39 in 2014-15)
- checked travel conditions during the journey, **33%**

The average amount of extra time allowed is exceeded by the average delay, except for time critical commuting, business and leisure trips.

3.1 Journey time KPI

High proportions of customers were satisfied with journey time; 86% for motorways and 90% for trunk roads.



The overall Journey Time KPI has increased from 2014-15 to **87.92**, but for journeys on motorways it decreased very slightly, continuing a downward trend from 2011-12.

The increase in the trunk road score has reversed the previous downward trend and is now the same as for 2012-13.

Changes in the journey characteristics between 2015-16 and 2014-15 include **fewer** respondents who:

- Had a time critical journey

37% **42%**

- Were delayed by volume of traffic on the SRN

17% **20%**

In 2015-16, a slightly higher proportion were delayed by bad weather than in 2014-15 (2% to 3%), but there were no differences for roadworks or accidents. Fewer had allowed extra time for delays (13% compared with 15% in 2014-15).

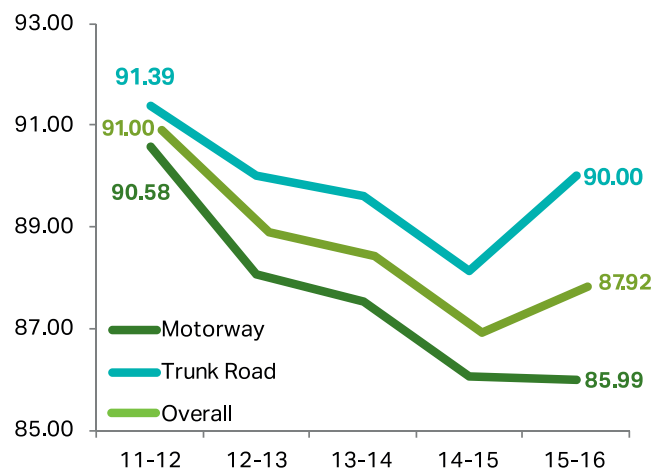


Figure 3.1 Journey time KPI by year

3.2 Journey time characteristics

Table 3.1 shows information on planning journeys, planning for delay, experiencing delay and satisfaction with journey time for 2015-16, by journey type, and by year.

This is for segments of journey types, based on purpose, direction (outward/return), and whether it was important to arrive at the destination at the time expected.

| Sample of journeys 2015-16 | | | | | | | | | | | | | |
|--|-----------------------------------|---------------------|--------------------|--------|-------------------------------|---------------------------------------|--------------|------------|---------|---------|---------|---------|------------|
| Trip Type | Important to arrive when expected | | | | | Not important to arrive when expected | | Time trend | | | | | |
| | Commute to work | OUTWARD | | RETURN | Returning home - all purposes | All purposes | All purposes | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | |
| | | Business Travellers | Leisure Travellers | | | | | | | | | | First time |
| Plan Journey | 2% | 75% | 28% | 55% | 5% | 21% | 17% | 16% | 15% | 16% | 18% | 20% | 21% |
| Check conditions before setting off | 6% | 24% | | 12% | | 10% | 8% | 6% | 6% | 7% | 8% | 12% | 10% |
| Check conditions during journey | 6% | 61% | 43% | 21% | 36% | 27% | 27% | 22% | 27% | 33% | 37% | 33% | |
| Allow extra time | 47% | 60% | 22% | 38% | 12% | 23% | 6% | 4% | 15% | 14% | 13% | 15% | 13% |
| Minutes extra allowed ¹ | 21 | 29 | 26 | 42 | 21 | 36 | 33 | 43 | 30 | 34 | 34 | 38 | 32 |
| Delayed on SRN | 36% | 36% | | 26% | | 33% | 21% | 25% | 21% | 25% | 28% | 30% | 28% |
| Average minutes delayed | 6 | 8 | | 6 | | 9 | 5 | 6 | 4 | 6 | 6 | 7 | 8 |
| Delay as proportion of journey time | 11% | 8% | | 6% | | 9% | 5% | 6% | 4% | 6% | 6% | 7% | 8% |
| Was alerted to delays | 26% | 29% | | 16% | | 23% | 10% | 14% | 10% | 12% | 17% | 20% | 18% |
| Minutes difference in time allowed and delayed | 4 | 4 | | 6 | | -1 | -3 | -4 | 0 | -1 | -1 | -1 | -4 |
| Annoyed ² by delay | 11% | 13% | | 8% | | 16% | 4% | 6% | 6% | 7% | 9% | 9% | 8% |
| Satisfied - with motorway journey time | 80% | 80% | | 89% | | 83% | 91% | 89% | 91% | 88% | 87% | 86% | 86% |
| Satisfied - with trunk road journey time | 86% | 89% | | 90% | | 87% | 92% | 89% | 91% | 90% | 89% | 88% | 90% |

Key

¹ - by those who allowed extra time

² - Annoyed/ stressed/ frustrated

Table 3.1

Time critical trips – Commuting

Extra time was allowed for almost half of time critical commuting trips, with 21 minutes being allowed on average. The average delay on commuting trips was 6 minutes, or **11%** of the average journey time. Commuters were alerted to delays for a quarter of trips, but **36%** actually experienced delay.

However, sufficient time had been allowed for, with 4 minutes more being allowed for than incurred.

Delay caused annoyance, stress or frustration on **11%** of commuting trips, (compared to **36%** being delayed), resulting in **80%** being satisfied with the journey time on motorways and **86%**

SATISFACTION

Motorways Trunk Roads



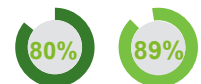
Time critical trips – Business

Time critical business trips included some made regularly, and some to new destinations.

Compared with the **21%** overall who planned journeys in advance, **75%** of those making a business trip to a new destination did so, and **28%** did so even for frequently made trips. Twice as many making business trips checked road conditions both before and during their journeys.

Extra time was allowed on **60%** of business trips to new destinations, and **22%** of trips to familiar locations, with around 26-29 minutes of extra time being allowed. The average delay on business trips was 8 minutes, or **8%** of the average journey time. Warnings of delay were observed on **29%** of business trips, and delays experienced in **36%**.

On average the time allowed exceeded the delay by 4 minutes; **13%** were annoyed by the delay, but **80%** and **89%** were satisfied with the journey time on motorways and trunk roads respectively.



Time critical trips – Leisure

Delay was experienced on **26%** of time critical leisure trips. Those making a trip for the first time had allowed an average of 42 extra minutes for the trip. The average buffer in time allowed and delay was 6 minutes.



Return home, 13% time critical, 35% not time critical

Thirteen percent of trips were time critical return trips; for the other return trips, arriving on time was not important. Where time critical, more return journeys were planned, and extra time allowed for than where the return journey time was not time critical.

More respondents making time critical return journeys experienced delay (**33%**), and were annoyed by this (16%). The time allowed was 1 minute less than the average delay; by 1 minute for time critical return journeys, and by 4 minutes for other journeys.

Where the arrival time was not considered critical, annoyance was relatively low and satisfaction was high.



Non time critical outward trips 25%

Twenty five percent of trips were non-time critical outward trips. Consequently, there was less planning and checking of conditions, although the average extra time allowed was 33 minutes, by the 6% who did allow extra time.



Five year trends

Over the last five years, there have been increasing trends in the proportions planning and checking travel conditions, but not in those allowing extra time.

Where extra time had been allowed, the amount has increased since 2011-12, in line with the proportions being delayed on the SRN.

The amount of delay relative to the overall journey time has increased each year, while the difference between the time allowed and delayed has decreased (although time critical journeys have adjusted to increased delay).

Figure 3.2 shows information on planning for delay, experiencing delay and satisfaction with journey time by year, and by the type of roads used on the journey. In 2015-16, **33%** used trunk roads only, **38%** used just motorways and **28%** used both, similar to previous years.

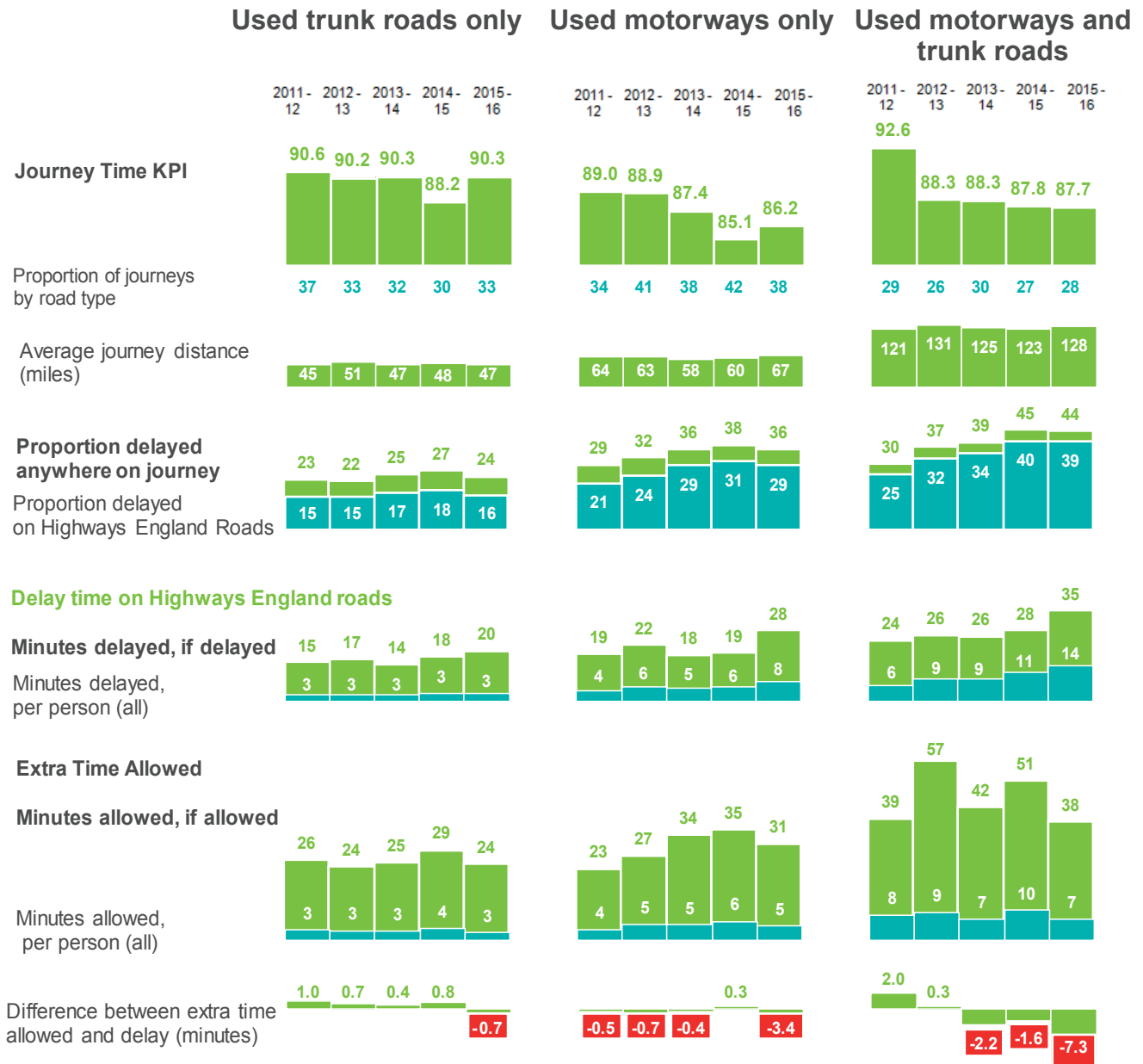


Figure 3.2 Journey planning and delay by roads used

NB The difference between extra time allowed and delay time (minutes) is based on the average for all respondents

As shown in Table 3.1, the average amount of extra time allowed is exceeded by the average delay, except for time critical commuting, business and leisure trips.

3.3 Causes of delay

Volume of traffic (congestion) remains the most commonly experienced cause of delay on both motorway and trunk road journeys, but has reduced for both road types since last year:

- 24% to 21% for all journeys involving motorways experienced congestion
- 22% to 20% for all journeys involving trunk roads

The proportion of delays caused by **roadworks** on motorways has increased to 18% from 16% in 2014-15 and from 10% in 2011-12.

On trunk roads the increase from 8% in 2011-12 peaked in 2014-15 at 15%, since declining to 14% in 2015-16.

Where delayed by roadworks, 67% were satisfied, compared with just 55% who were satisfied when delayed by congestion.

For journeys on trunk roads, 73% said they were satisfied with the journey time even where delayed by roadworks, and 70% said they were satisfied even though delayed by congestion.

The Midlands region was the worst for delays; **36%** of journeys using the roads in the region were delayed, while just **14%** of those in the East region were delayed.

3.4 Use of travel information

Customers were asked if they planned their routes and checked travel conditions before or during their journeys.

The proportions who planned their route in advance of travel has increased year on year, with 21% now planning in advance (20% in 2014-15 and 15% in 2011-12).

21% plan trip in advance

This is most likely to happen for first time trips to new destinations. For example, 83% of business trips and 56% of leisure trips to new destinations would be planned. The use of Sat-Nav systems for route planning has increased over time from 10% in 2011-12 to 14% in 2015-16.

Sat-Nav usage for route planning increased from

10% → 14%

Compared with 2014-15, for other aspects of planning there are proportionally fewer respondents in 2015-16 who:

- checked travel conditions in advance, 9%
- allowed extra time for the journey, 15%
- checked travel conditions during the journey, 33%

Although the use of mobile phones and mobile internet for checking travel conditions in advance of travelling had been increasing over time, it has since fallen to 20% in 2015-16. Using these sources for checking conditions whilst travelling, has also fallen to 8%.

Summary

Speed restrictions, and where no work is seen to be undertaken have a negative impact on satisfaction.

Of the 5 journey aspects rated, satisfaction with roadworks management is lowest. However, **65%** were satisfied where they had seen roadworks on motorways, and **66%** were satisfied with roadworks encountered on trunk roads.

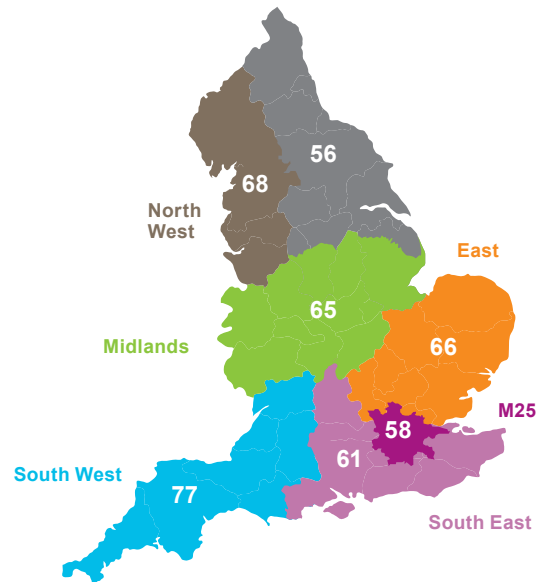
There has been no clear trend in satisfaction with roadworks management on either motorways or trunk roads over the last 5 years, but a decline since 2014-15.

| KPI | 11-12 | 12-13 | 13-14 | 14-15 | 15-16 |
|----------------|--------------|--------------|--------------|--------------|--------------|
| Motorways | 69.78 | 66.82 | 73.50 | 65.99 | 64.66 |
| Trunk Roads | 68.93 | 64.13 | 66.67 | 69.47 | 65.84 |
| Overall | 69.44 | 66.03 | 71.73 | 66.95 | 65.09 |

The South West region had the highest roadworks management KPI in 2015-16, showing a steady increase since 2011-12. By comparison, the South East experienced the biggest drop in satisfaction from **77.39** in 2014-15 to **60.55** in 2015-16.

Reasons for being satisfied with roadworks management on motorways included:

- no hold ups / smooth flowing traffic
- clear signs
- reasons for works provided
- advance notice of closures and works
- all lanes open
- feeling safe while travelling through roadworks
- an acceptance that the work needs to be done



Since 2014-15 there has been a decrease to **15%** in the proportion of customers seeing roadworks on motorways, with **8%** seeing them on trunk roads. Respondents are most likely to have found out about roadworks from travelling through them, with a decrease in the use of technology (internet) to inform of roadwork locations.

4.1 Seeing roadworks

There has been a slight decrease in the proportion of customers who passed roadworks on their last journey. In 2015-16, **34%** said they had encountered roadworks, a decrease from **36%** in 2014-15. This includes **9%** who saw them only on local roads, and **8%** on trunk roads.

Most customers found out about the roadworks seen from driving through them (**70%** on 2015-16, **62%** in 2014-15). Usage of the internet to find out about roadworks in advance has dropped from **14%** last year to **2%** in 2015-16. This may be due to the number of new schemes in place, or may be due to Highways England having removed their roadworks information from the internet.

Roadworks were most likely to be encountered on motorways (**15%**) although this has also decreased since 2014-15. Of people who saw roadworks, there has been a decrease in proportions reporting seeing closed lanes (**34%** down from **43%**), with declines also in those stating there were speed restrictions (**79%**) or narrowed lanes (**51%**).

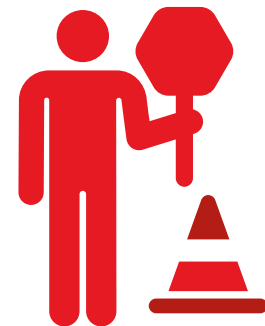
4.2 Satisfaction

Where roadworks were encountered on the SRN, satisfaction with the management of them on motorways has remained consistent since 2014-15 at **65%**.

For both motorways and trunk roads, there has been a decrease in the proportion who are very dissatisfied, as shown in Figure 4.1.

16% who passed roadworks on motorways were dissatisfied

10% who passed roadworks on trunk roads were dissatisfied



There was an increase in respondents stating that if there are speed restrictions then they expect work is being carried out (**75%**), a gradually increasing trend from **28%** in 2011-12. The proportion of respondents saying work was being carried out dropped to 38% from 44% in 2014-15.

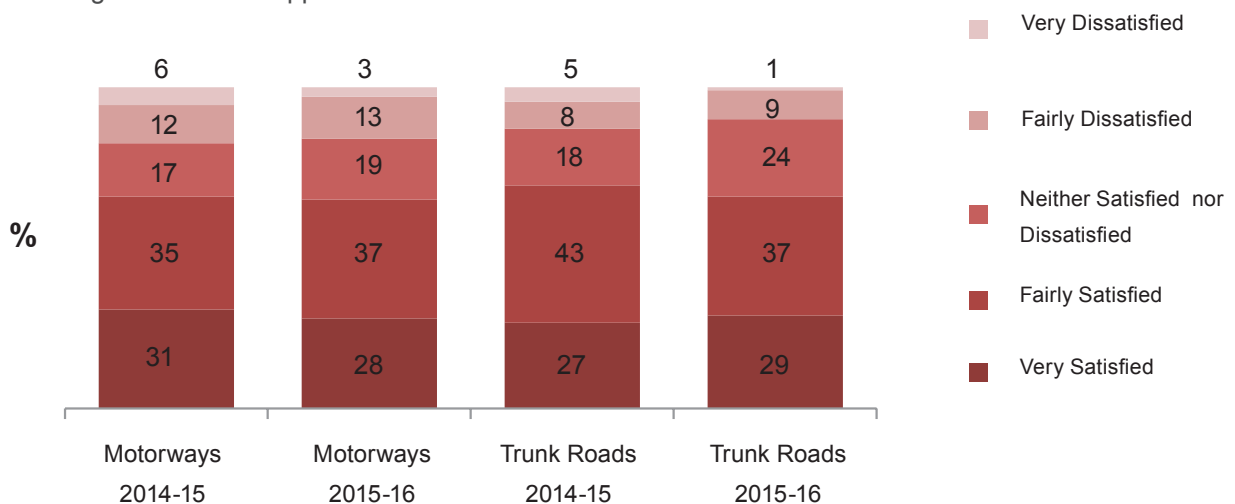


Figure 4.1 Satisfaction with roadworks management, 2014-15 and 2015-16

Dissatisfaction arose from:

- Seeing no work in progress
- Long stretches of roadworks with speed restrictions

However, there is an expectation that, to some degree, respondents will not see work being carried out **'because they never do'**.

Some feedback from customers who passed roadworks and the key issues affecting dissatisfaction include:

"You often see as long as 15 miles of roadworks with work only being done on a small section of it and a 50mph limit imposed which is frustrating"

"I saw nobody working for miles and miles of cones and speed restrictions"

"Stop coning off lengths of roadworks when no work is taking place"

"Doing them in shorter sections would be better so we don't have to go through 20 miles of roadworks"

"You often see large sections of coned off motorway and little or no work taking place which is why it seems to take ages to complete"

"I think there should have been people working at the roadworks"

Those respondents who stated they were 'neither satisfied nor dissatisfied' said this was because:

- the works hadn't affected them
- they hadn't been delayed by the roadworks
- work had been going on for so long they were used to them
- despite works being inconvenient, they were necessary

For those respondents who were satisfied with roadworks, a key reason for this was good signage.

"They have good signage which they have trialled like 'my dad works here'. Clear communication"

"Well signposted and plenty of information"

"They have a picture up saying my dad works here and it brings it home to you"

"We were given a lot of advance notice, the roadworks were quite swift and didn't really delay us"

"Friendly signs are excellent, I love them"

"A lot of apology signs explaining why they were doing the work"

Safety – feeling safe using the SRN

Summary

Over 90% of customers felt very safe or fairly safe on their last journey on the SRN.

The majority of respondents felt safe on their most recent journey on the network; **92%** on both motorways and trunk roads. The proportion of people feeling a bit or very unsafe on motorways has decreased slightly since last year.

| KPI | 11-12 | 12-13 | 13-14 | 14-15 | 15-16 |
|----------------|--------------|--------------|--------------|--------------|--------------|
| Motorways | 93.93 | 94.17 | 91.97 | 91.14 | 92.20 |
| Trunk Roads | 94.54 | 94.64 | 93.08 | 92.62 | 92.46 |
| Overall | 94.24 | 94.39 | 92.50 | 91.81 | 92.33 |

Reasons for feeling safe, which have remained consistent over the last 5 years, include:

“I trusted the driver I was with”

“The roads were good, weather reasonable and I have a well maintained car, plus I’m an advanced driver”

“I drive with due care and attention and don’t break speed limits”

“Good weather conditions, did not come across reckless drivers”

“I do the trip a lot and know what to expect”

“Roads were quiet, no roadworks”

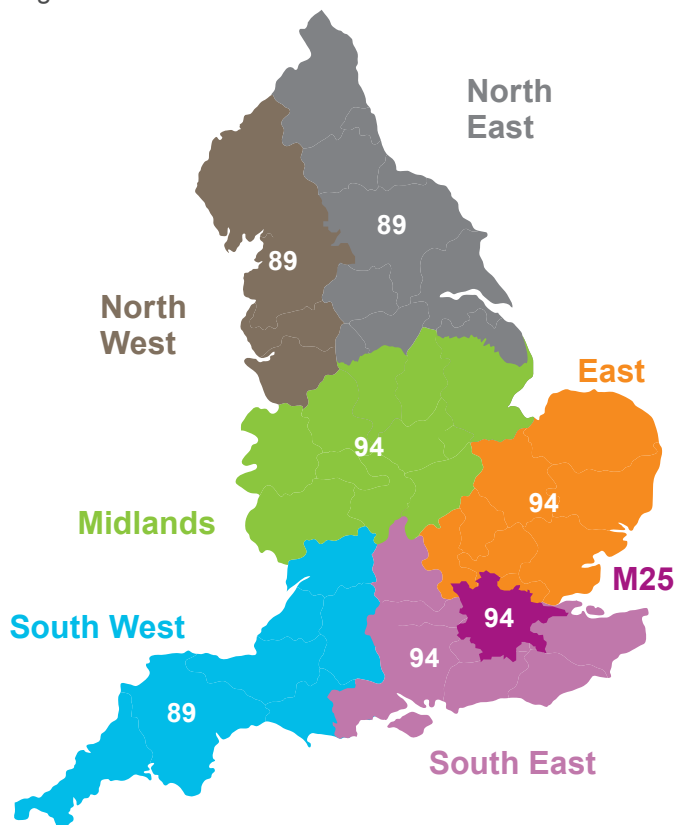
In the North East and North West, 89% felt safe on their journey. In all other regions the proportion was **94%**. There were no regional differences in the proportions of nervous customers.

Other people’s driving and **poor weather conditions** are the main causes of feeling unsafe, but other factors include being a **nervous traveller**, and aspects of the **road layout** and **infrastructure**.

There was no difference in how safe customers felt on either motorways or trunk roads. **Poor driving** was reported more **frequently on motorways than on trunk roads**.

Speeding was the most frequently mentioned type of **poor driving**, this does not make people feel especially unsafe. **Unpredictable behaviour** such as **sudden braking** and **undertaking** were most associated with customers feeling unsafe.

Women and those with **health issues** making it difficult to travel felt least safe when travelling, regardless of the road conditions.



Ninety two percent of respondents felt safe on their most recent journey on the network. The proportion of people feeling a bit or very unsafe has decreased on motorways since **2014-15 to 4%**, and remained consistent at **4%** on trunk roads.

Reasons given for feeling unsafe included:

- **the weather** “Spray and water on the motorway, also visibility was quite poor”
 - **poor driving by other customers** “Lots of drivers cutting across lanes, seemed very dangerous”
 - **features of particular roads, for example, poor lighting, no hard shoulder, confusing signs and poor road surface** “It needed to be better lit and the cat’s eyes weren’t well lit which didn’t help...bad road surface and potholes”
 - **the presence of HGVs** “The lanes are far too narrow, when you are alongside a HGV it is terrifying”
 - **volume of traffic** “I hate travelling so fast with all the traffic, there are too many cars all around”
 - **features of roadworks e.g. narrow lanes** “The roadworks section with the yellow studs means the lanes are narrow and other vehicles are travelling very close and with no barrier”
-

Some customers said they were nervous on the roads regardless of conditions, especially females and those with health issues.

5.2 Poor driving

Poor driving noticed more on motorways than trunk roads.

The proportion of customers who observed poor driving on the SRN decreased to **39%** in 2015-16 from **43%** the previous year (**45%** of those who used motorways and **39%** of those who used trunk roads).

A higher proportion of those who used motorways on the last journey experienced poor driving, **42%** compared with just **35%** who just used trunk roads. Less than half (**45%**) of respondents experienced poor driving where both road types were used.

The most frequently mentioned poor driving behaviour was speeding (**37%** of those who saw poor driving), followed by drivers cutting them up (**23%**) and tailgating (**19%**). There was a decrease in drivers seen using mobile phones from the previous year (**7%** down from **13%**).

While **17%** of customers were not bothered by the poor driving they had seen, **39%** felt angry or annoyed by it, and **22%** felt unsafe.

| Causes of anger and annoyance | | Causes of feeling unsafe | |
|-------------------------------|---|--------------------------|--|
| Lane hogging | 1 | Sudden braking | |
| Drivers using mobiles | 2 | Undertaking | |
| Sudden braking | 3 | Lane jumping | |

As many customers mentioned more than one type of poor driving, it is not possible to directly relate the impact to the type of driving, but, as shown in Figure 5.1, there are some relationships.

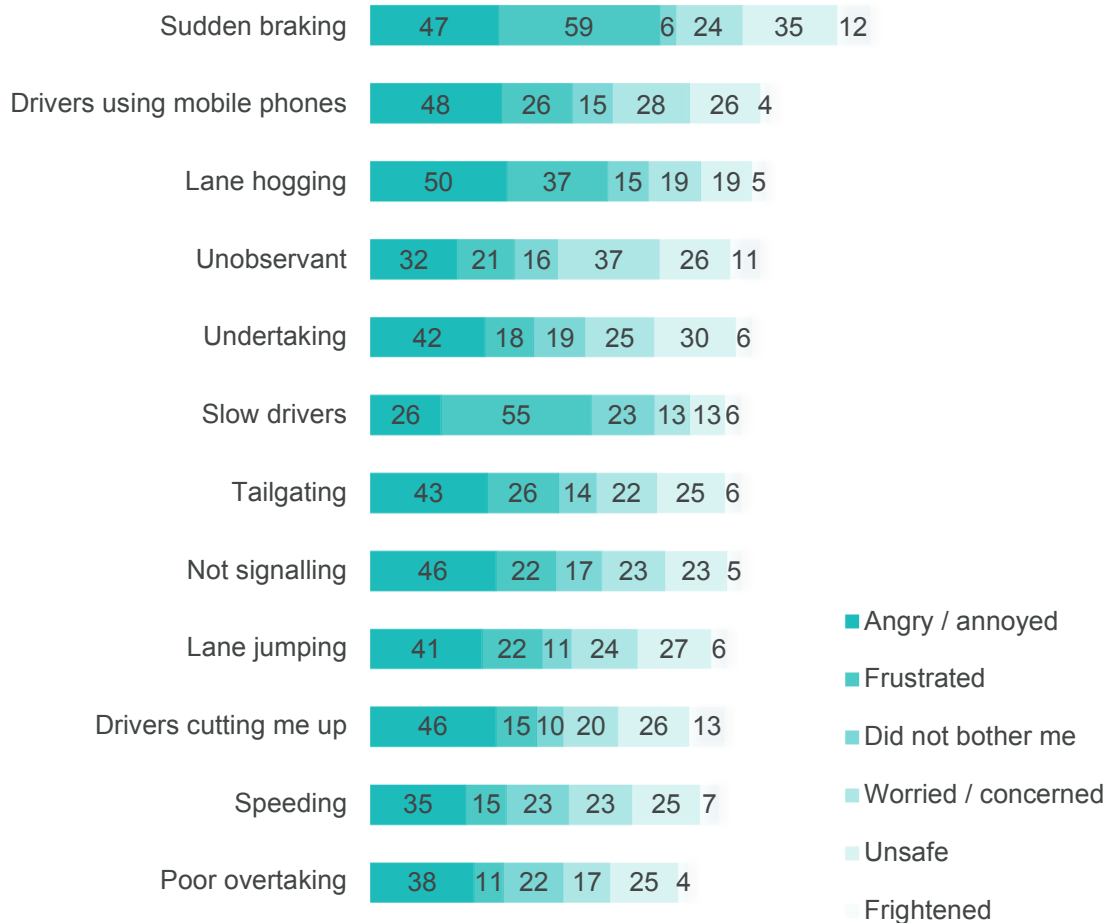


Figure 5.1 Types of poor driving observed on SRN and their impacts

The most prevalent type of poor driving, speeding, did not bother **23%** of those who saw it. It angered **35%**, and made **25%** feel unsafe.

Just **34%** who **exceeded 70mph** when driving (faster drivers) said they had seen **speeding**, compared with **39%** of those who drove at **70mph or below** (slower drivers).

Speeding caused a greater proportion of **slower drivers** to **feel worried (24%)** than **faster drivers (16%)**, as well as older drivers (**47%** compared to **24% aged 17-34**), and males (**44%** compared to **36% females**).

Regardless of seeing poor driving, the average safety KPI was **lower for females** and **those with health issues**.

Unpredictable behaviours such as sudden braking or undertaking had the greatest impact on feeling safe.

Behaviours such as speeding or slow driving caused fewer safety concerns.

High levels of satisfaction with upkeep, especially for motorways.

- Despite an overall decline over the last 5 years, satisfaction with upkeep and maintenance on motorways remained high, with 92% being satisfied in 2015-16. Satisfaction was also consistent for trunk road customers, at 87%.

| KPI | 11-12 | 12-13 | 13-14 | 14-15 | 15-16 |
|----------------|--------------|--------------|--------------|--------------|--------------|
| Motorways | 93.94 | 93.49 | 91.44 | 92.13 | 92.10 |
| Trunk Roads | 91.46 | 88.16 | 87.93 | 88.33 | 86.79 |
| Overall | 92.67 | 90.97 | 89.76 | 90.38 | 89.52 |

- Customers in the North West were most likely to be dissatisfied with upkeep (82.74) with those in the Midlands most satisfied (92.71).
- Principal causes of dissatisfaction were: **potholes, poor surfaces, and maintenance of verges and vegetation.**
- **Litter** was a key cause of dissatisfaction but more prominently among older user groups. Younger age groups were less likely to be angry/ annoyed as a result of seeing litter, stating they were not bothered by it.

6.1

Satisfaction with upkeep

Satisfaction maintained since last year.

High proportions were satisfied with upkeep; **92%** on motorways and **87%** on trunk roads, giving a KPI for upkeep of **89.52**, a slight decrease from **2014-15**.

The proportion dissatisfied with upkeep on both motorways and trunk roads has remained consistent in 2015-16 compared to last year.

Causes of dissatisfaction across all demographics included:

- potholes and uneven surfaces
- roadside environment, including verges and vegetation
- road layout, for example needing more lanes, confusion with road markings at junctions

6.2 Litter

Increase in trunk road customers seeing litter.

Whilst **15%** percent noticed litter on motorways, consistent with 2014-15, an increased number noticed litter on trunk roads (**20%**). **Seven percent** of customers could not remember whether or not they had seen litter on their last journey on the SRN.

When asked how they felt on seeing litter, 7% were not bothered, with over half (**57%**) angered or irritated, an increase from 2014-15.

Older respondents were significantly more likely to have noticed litter on trunk roads (**25%**), with those aged **17-24** significantly less likely to feel angry or annoyed (**24%**) from seeing litter, and significantly more likely not to be bothered (**38%**).



Figure 6.1 Reasons for Satisfaction with Upkeep

Excluding multi region trips, those travelling in the **M25** region were most likely to report seeing litter on trunk roads (**24%**), closely followed by the East region (**23%**). Similar proportions saw litter on the M25 and East region's motorways (**25% and 21% respectively**). Litter was seen less frequently during trips made on roads in the North East and North West.

Reasons for both satisfaction and dissatisfaction with upkeep showed no differences regardless of age, gender or region.

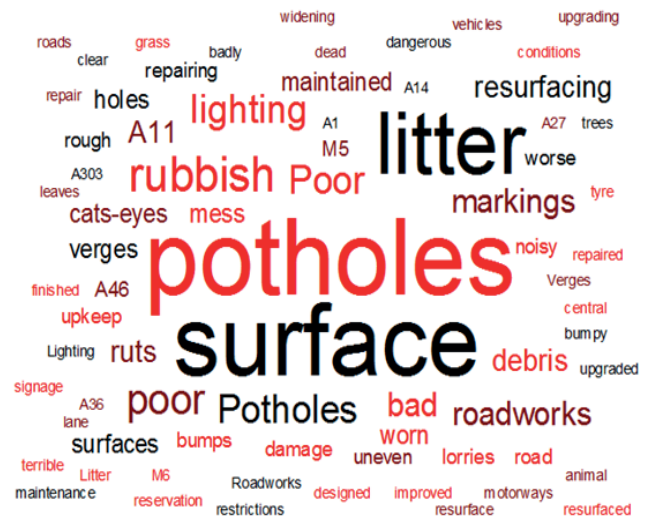


Figure 6.2 Reasons for Dissatisfaction with Upkeep

Summary

- Satisfaction with information provision increased in 2015-16, with **92%** of customers satisfied with the information on their last journey using the SRN.
- Causes of dissatisfaction included areas where signs were not clear because of insufficient maintenance, or because wording was perceived as ambiguous or confusing.
- There has been a decline in the proportion of customers changing their behaviour as a result of information on VMS. Customers liked to have VMS available, but where the messages bring unwelcome news, the effect on customer satisfaction is negative.

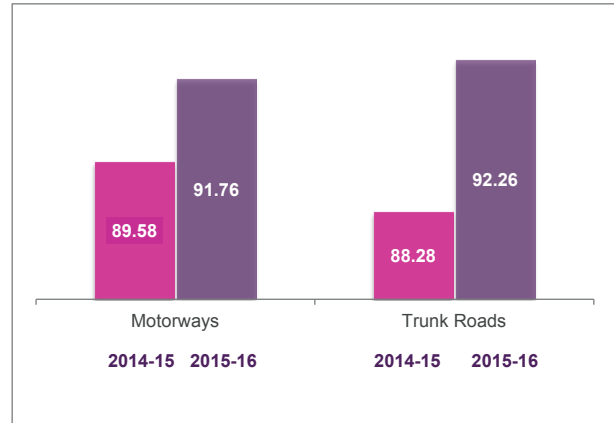


Figure 7.1 Signage KPI for Motorways and Trunk Roads

7.1

Satisfaction with signage (information provision)

Satisfaction remains high for SRN journeys.

Customers rated satisfaction with information provision on their most recent journey. For motorways, this included electronic VMS as well as static signs such as blue signs.

The Signage KPI increased in 2015-16 to **91.99**; for both motorways and trunk roads.

Comments from dissatisfied customers show the causes were varied, including:

- signs obscured by vegetation
- unable to see the sign because of their position at the side of the road
- generally dirty
- confusing and ambiguous
- difficult to see due to poor lighting

7.2

VMS

VMS tends to increase satisfaction unless message is about delay.

Seeing VMS significantly increased satisfaction; **71%** of motorway users were very satisfied with information provision where VMS were seen, compared with **61%** where no VMS were seen. Travel time VMS such as “6 minutes to next junction” and campaign type messages such as “Don’t drink and drive” have **little or no effect** on driving behaviour. This is to be expected as they provide information and don’t require immediate action.

Two thirds slowed down on seeing speed restrictions, as did three quarters of those who saw warnings for water on the road/ slippery roads, and half of those who saw warnings of slow vehicles or debris ahead.

Customers were satisfied with VMS where the messages were clear, easy to read and informative, but not all appreciated messages which gave warnings for parts of the network not relevant to their journey. Other reasons for dissatisfaction included messages that were out of date, inaccurate or did not include a reason for the delay.

Some comments made by dissatisfied respondents were specifically about VMS and the types of message displayed or lack of information.

- “It gave the **wrong information**, it gave wrong road numbers”
- “There were a couple of incidents we were supposed to slow down for but there were no incidents, the **signs were wrong**”
- “**Too many**, as you are approaching the roundabout they have put new signage up but they have left all the old signs”
- “The road sign for our exit off the M6 was a bit **unclear** and we missed our exit, it was a bit last minute”
- “Some are not high enough and cannot be seen due to being **obscured by bushes**”
- “**Should all be overhead** so that you are able to see them more easily”
- “Some are covered in branches and are **not clean**”
- “The matrix doesn’t tell you enough, they say slow queue when you’re sat in the queue, they need to tell you how long or something **more informative**”
- “It would have been good to have a sign telling us **why** we were so delayed”

Over half of customers, **59%**, felt VMS were helpful, similar to previous years. The most useful messages were warnings of accidents, queues and delays ahead.

As shown in Figure 7.2, despite a decline in the perceived accuracy of VMS in previous years, this has actually increased in 2015-16 to **73%**. In 2015-16, significantly more respondents felt VMS accuracy had remained consistent (**81%**).

Seven percent felt VMS should be used for purposes other than safety and traffic campaign messages, an increase since 2014-15. For example, suggestions for public awareness messages that could be displayed included upcoming local events, or lost children campaigns.

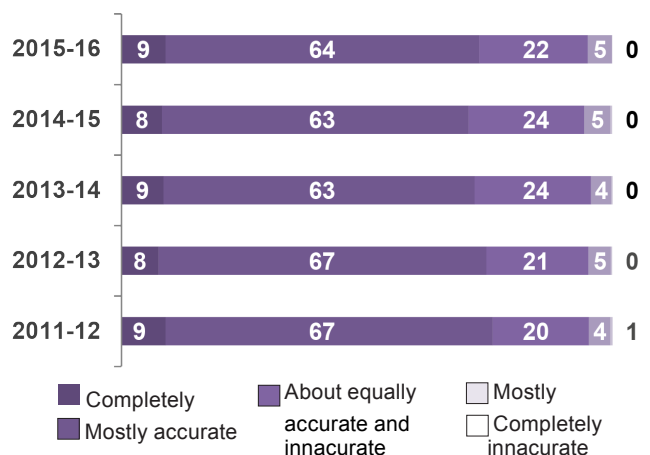


Figure 7.2 Perceptions of VMS accuracy by year

General perceptions of Highways England and its services

Overall satisfaction

While the KPI tracks satisfaction with a journey, NRUSS includes an additional satisfaction question tracking overall satisfaction with Highways England and its services.

In 2015-16, **85.4%** were satisfied, an increase from **82.4%** in 2014-15.

The proportion who were ‘very satisfied’ is lower at **27%** than any other time in the last five years.

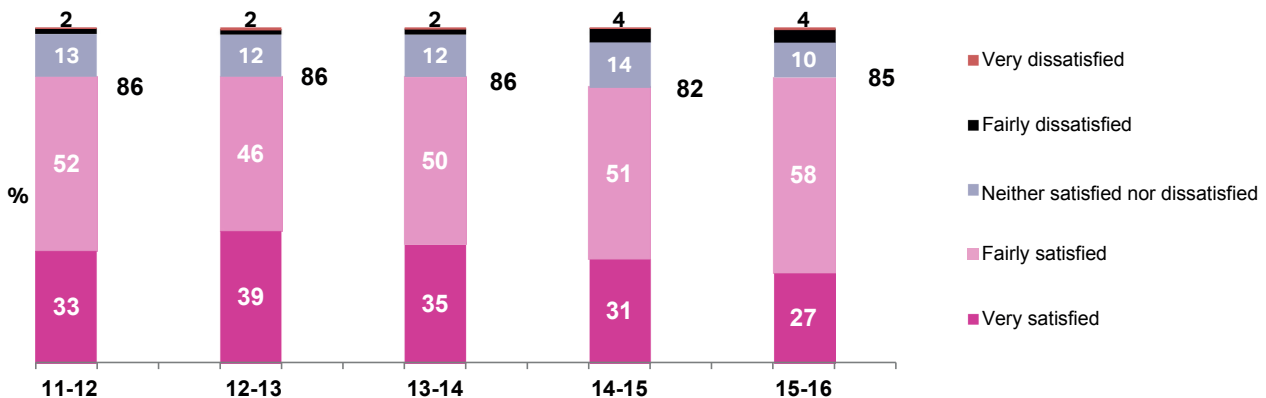


Figure 8.1 Satisfaction with Highways Agency (2011-2015), Highways England

Just six people were very dissatisfied in 2016, with the key theme for this being the pace of roadwork completion.

“Can they get on and do some work please”

“Finish some of the roadworks some have been ongoing for years i.e. M25 and Dartford Tunnel”

“Hurry up with the smart motorways”

“Reduce traffic jams. Roadworks to be completed”

“Must manage traffic flow better. Keep freight off the roads and on to trains”

“Speed limit is far too slow”

Fewer were satisfied in the North East and North West (**76%** and **77%**) while the Midlands and East residents gave the highest satisfaction ratings (**92%** and **91%**)

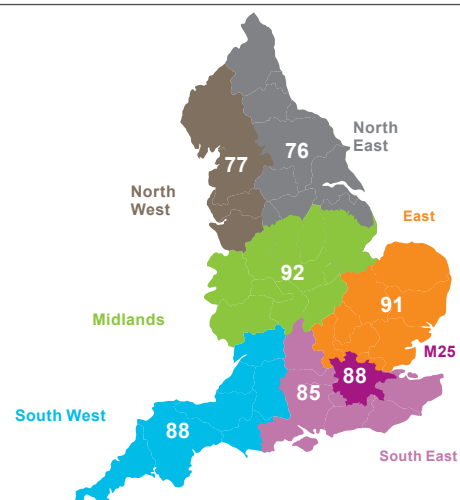


Figure 8.2 Overall satisfaction by region

2015-16 was the first year the SRN was managed by Highways England. For this transition year, respondents were asked about awareness of both the Highways Agency and Highways England. Awareness of the Agency fell to its lowest in five years, with **78%** being aware. Of those who were aware, just **7%** knew that the operating name was now Highways England.

Traffic officers

Awareness of traffic officers also decreased in 2015-16, to **65%**, and just **14%** said they had seen any traffic officers on the last journey, fewer than at any time over the last five years. In 2015-16, traffic officers were seen on just **4%** of journeys where only trunk roads were used.

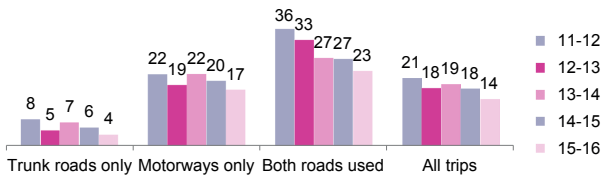


Figure 8.3 Proportions of journeys where traffic officers seen

However **90%** said they were important, more than in any previous year.

Priorities for improvement

- Key priority for improvement in 2015-16 was road maintenance, increased from:

14% → 23%

- Roadworks, investment and road building were also frequently mentioned.

Example comments about the SRN in general include:

“The condition of the road is a priority to keep traffic flowing”

“They need to prioritise the roadworks, make information clear about what they are doing and not have miles of coned off roadworks with nothing going on”

“Safety on the road should always be the key priority”

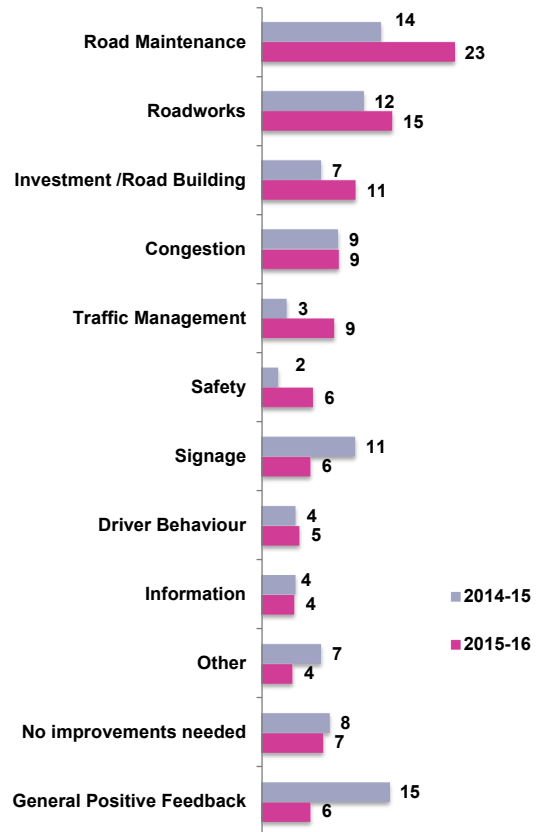


Figure 8.4 How could Highways England improve?

Frequently mentioned roads included the M3, in particular the smart motorway upgrade, and the A14.

“The M3 is very slow at the moment with what’s going on with the upgrade to a smart motorway”

“Look to repair potholes on the A14 and the general condition of the road surface”

“Sort out the A14, there’s always accidents on this road”

The proportion of customers who mentioned traffic management has tripled since 2014-15, reflecting increasing need to manage the volume of traffic on the SRN.

Smart motorways

Awareness of the use of the hard shoulder as an extra lane increased from **39%** in **2014-15** to **50%** in **2015-16**. Awareness of this smart motorway measure was highest in the **Midlands** and **M25** regions, where such measures have been in place for some time.

Awareness of all smart motorway measures has increased since last year, with **92%** now saying they are aware of at least one measure.

However, perceptions of the positive impacts of smart motorways have declined slightly from 2014-15. Fewer said that journeys would be safer, traffic

flow would be improved and delays would reduce. There was no change in the proportion who thought journeys would be less safe.

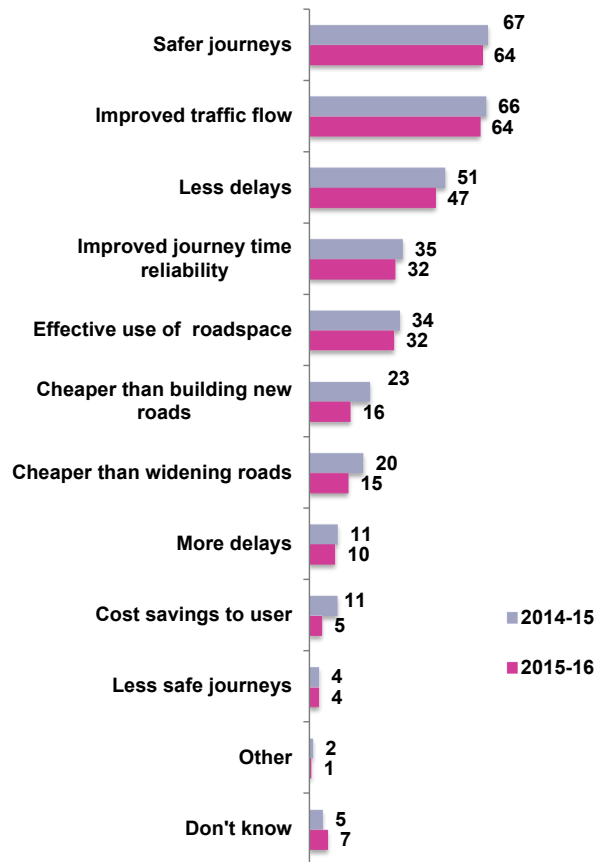


Figure 8.5 Impacts of smart motorways

Recommendations

Highways England has a target for the KPI for 2016-17 to exceed 90.00. This requires an increase of less than 1 point, from the 2015-16 score of 89.32. While there has been an increase in the KPI from 2014-15, satisfaction with the motorway journey time component has continued to fall. Both the North East and North West trunk roads KPIs fell, with the upkeep KPI reducing most. In the South East, the roadworks management KPI fell for both motorways and trunk roads.

Based on the findings from NRUSS 2015-16, the factors that would positively influence the KPI are:

- **Reducing delays** and their negative impacts; for example, lifting 50mph speed restrictions through roadworks when traffic volumes are low would remove some of the frustration this causes.
- **Helping customers feel more confident:** for example, greater visibility of the police or traffic officers to deter poor driving.
- **Creating a more positive impression of roadworks:** through measures to indicate progress being made, for example through signage (“In the last month/week we have replaced X gantries ...”), or ensuring that works are completed as quickly as possible.
- **Ensuring signage is informative:** personable and positioned well in advance, informing SRN users of the reasons for the work.
- **Reducing litter:** this was highlighted as a significant cause of dissatisfaction on trunk roads. Black-spots could be identified through patrols (by extending the traffic officer service over more of the trunk road network).

VMS or radio adverts have been used recently to inform drivers about Red X and how to use smart motorways. These channels could also be applied to promote campaign messages to:

- **Reduce littering,** focused on areas where the problem is perceived to be the greatest (M25 and East regions).
- **Reduce unsafe driving behaviours,** e.g. undertaking, leaving safe distances between vehicles in front and avoidance of sudden braking.

Radio is a frequently used source of information for road users. As well as radio stations relaying information about disruption on their traffic bulletins, there may be scope to utilise these for wider information about roadworks:

- **Reasons for the works** (and the long term benefits that will be realised, and when).
- **Reasons for closed lanes and speed restrictions** (including identification of where within a scheme works ARE taking place, which could reassure those who may not see it in person).

The use of radio as a means of communication may not reach all road users, but can complement the use of static

or mobile signs. There is a risk that some customers can be confused by an over-abundance of signs (which could also impact on confidence, and feelings of safety).

In designing solutions that could increase customer satisfaction, there is also a need to avoid factors that could negatively influence the KPI. For example this includes:

- **Ensuring safety is not compromised**, e.g. if speed limits are raised in roadworks with speed restrictions.
- **Minimising delays**, e.g. there should be no reduction in capacity (with risks to increasing delays) from activities such as litter collection, maintenance of signage.

The lowest performing KPI component is roadworks, typically scoring around 65 on the 1-100 scale. This is lower than the other measures which score around 90. However, as only around a third of NRUSS respondents encountered roadworks in the last journey, the score for roadworks contributes less than a fifth to the overall KPI for satisfaction. So while measures to improve the experience of roadworks will increase customer satisfaction, the effect on the KPI may take time to emerge.

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