

Workstream 3: Customer satisfaction and learning from SRUS

Office of Rail and Road

31 March 2021



FINAL REPORT

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EXECUTIVE SUMMARY

For RP2, Highways England's customer satisfaction KPI is based on the new Strategic Road User Survey (SRUS) and its performance will be monitored by ORR. Despite the suspension of SRUS during the pandemic, there are two years of data up to the start of RP2 that form a substantial body of intelligence. ORR expects Highways England to build on work from RP1 and gradually develop clearer links between the actions it takes and the interests of road users, to monitor the impact of these actions on the KPI, and to ensure that best practice and lessons learnt are shared across its regions to continually improve performance.

To support the ORR's review of customer satisfaction and Highways England's learning from SRUS to date, we were set the following study questions.

How has Highways England developed its processes to analyse SRUS results, recognizing that SRUS is a new survey?

We find that Highways England has made reasonable early progress on developing its SRUS processes from those established during RP1 – i.e. the Company is where ORR might reasonably expect it to be given the current circumstances and the data available. It has developed a detailed understanding of the survey, both in terms of the key themes and drivers, and in the differences from NRUSS.

Undoubtedly Highways England has been hindered by the suspension of the survey and so ORR should continue to monitor how the Company is improving its use of SRUS to measure and demonstrate the effectiveness of the actions it takes to improve customer service on the network.

How is the SRUS embedded into Highways England's business processes?

Overall, we find that Highways England has made a good start at embedding SRUS into the business. It has taken on-board the key drivers analysis, translated these insights into useful tools such as the Roadworks Implementation Toolkit, and is encouraging the project teams which operate and work on the network to focus on improving customer service more generally for example through its monitoring of project teams (i.e. the Customer Assurance Framework). It is also developing its own internal capability (via the "Centre of Excellence" and regular regional customer experience "self-discovery" exercises).

Whilst SRUS is just one of a broad range of sources of customer insight that Highways England uses to develop its customer service strategy, it is also the Company's main KPI for customer satisfaction. The main concern identified in our review is that "line of sight" – i.e. a clear connection or golden thread – is sometimes lacking between SRUS, the key drivers analysis that Highways England has undertaken, and the individual actions that Highways England sets out in its annual Customer Service Plan. We acknowledge that Highways England has a plan to deliver improved customer service in the round, but ORR may wish to encourage Highways England to demonstrate clearer links between SRUS, the contents of the plan and KPI performance.

The Company understands that customer perceptions around journey times and roadworks, feelings of control over their journey, and provision of information ahead of the journey are key to overall satisfaction. And in these areas it is more obvious that Highways England has developed a customer service plan which includes a set of actions aimed at things it can do better and where it can show evidence to demonstrate the impact on SRUS performance.

But in other areas of the plan, it could not articulate how the link with SRUS had been identified and why, for example, supporting better integration with other transport modes is prioritised alongside improving the accuracy of roadworks information. It is positive that the Company responds to a range of customer insights, but it also needs to be able to balance these demands given that customer satisfaction activity must compete with other important priorities (e.g. safety, scheme delivery) for resources and management attention. It suggests to us that the Company has found it difficult to identify a targeted number of focus areas that it should prioritise its efforts on in year in order to deliver the greatest impact on SRUS (17 actions is a large number for one year), which is also perhaps reflected in the lack of clarity in some of the actions listed, both in terms of *what* Highways England will do and by *when*.

Where clarity is lacking, we recommend that ORR continues to monitor how Highways England established its priorities during the development of the customer service plan in relation to maximising its impact on SRUS, and establish tangible evidence of progress that has been achieved in year.

What are the key drivers of satisfaction as measured by SRUS, and how does this compare across Highways England and Transport Focus?

We find that views about the key drivers of SRUS satisfaction broadly align between Transport Focus and Highways England, although Highways England identifies a broader range of drivers, particularly in relation to journey times, and does not consider SRUS in isolation – i.e. it also uses other sources such as Highview to identify drivers of customer experience.

Transport Focus agrees that Highways England has delivered real progress on important drivers, for example on roadworks information, but sees less urgency on what it describes as “marginal gains”, for example on fixing signage. It feels there are realistic actions which would deliver tangible improvement to the user experience in the near term, even if they appear lower on the hierarchy of key drivers.

We recognise that the views raised by Transport Focus suggest a potential tension, between Highways England seeking out marginal gains and applying its resources to big ticket issues where more significant improvement is needed. On the one hand, the greatest impacts on SRUS may come from these big ticket issues. But if these are particularly difficult to address within the resources available, then Highways England might reasonably focus on making marginal improvements in other areas. Ultimately this is a balancing act which the Company must take a view on given its available resources, but we recommend that ORR continues to engage with both Transport Focus and Highways England, to ensure that the right balance is struck between less noticeable but gradually compounding marginal gains and the ‘big ticket’ items which often receive the most management attention.

Related to the above, ORR noted that although there was broad alignment between Highways England and Transport Focus on the key drivers of SRUS satisfaction, the analysis on which this view is based (Highways England’s structural equation modelling technique) might understate the importance of particular themes where user satisfaction is currently relatively high, but should not be “taken for granted”. For example, sub-themes such as *permanent signage*, *lighting* and *cats eyes* might have a low statistical relationship overall based on today’s SRN environment (which is relatively safe by international standards), but might have a more significant impact on overall satisfaction if the quality of permanent signage, lighting or cats eyes were to deteriorate, or users expectations of these features were to increase over time.

What other sources of insight does Highways England use, and how are they used to develop its customer service plans?

We find that Highways England makes use of a variety of sources of customer data to help improve its customer service performance and to embed customer insight into business decision-making more generally. In addition to SRUS, the main other sources of insight are:

- Highview – Highways England’s own customer experience tracking survey.
- Highways England’s Customer Panel – an online customer engagement platform.
- Bespoke consumer, social and behavioural research – commissioned on specific issues, and additional insight from research externally carried out by Transport Focus.
- High-volume customer channels – e.g. Highways England website, customer contact centre, Traffic England service and social media.
- Direct Engagement with customers and local communities.

Highways England told us that it synthesises a wide range of insights (from both internal and external sources) to identify its corporate customer service priorities and develop its customer service plan, which is regularly discussed in detail with Transport Focus.

It is clear that for many of the actions in its customer service plan Highways England has: listened to and developed an understanding of user needs and priorities, is taking action to reduce the impact that the Company's activities can have on customers, and has (or is in the process of developing) specific measures to measure success.

However, an area for improvement that we note above about the current customer service plan is that it is not clear to us (based on the evidence provided to this review) how Highways England has sought to prioritise or focus the actions such that the main weight of the plan is directed towards improving its main customer satisfaction KPI, or how it will measure the success of some individual actions in order to learn what works and what doesn't. Whilst we acknowledge that the plan aims to deliver improved customer service in the round (i.e. it is not just targeted on SRUS), in our opinion SRUS should still be the main focus as it drives the customer satisfaction KPI. But the links with SRUS are not always well articulated, and some of the actions are not specific, measurable or time-limited.

From Transport Focus' perspective, are the key customer service issues being adequately addressed by Highways England delivering the proposals in their customer service plan?

Transport Focus was overall positive in its view of the Company's customer service strategy, in that it believes there are areas of strength, but also areas for improvement. It considers that Highways England is demonstrating areas of clarity in addressing some of the key messages contained in SRUS, for example more accurate and timely roadworks information, where Highways England's willingness to improve has generated real progress.

But it also considers that this example of "buy in" could be extended by Highways England to deliver what it described as marginal gains in other areas. The broad areas where it would like to see further progress include:

- Building on the success of initiatives such as improving roadworks information, by using the opportunity for marginal gains in other areas that customers value or have expectations; and
- Driving the agenda for RIS3, because it believes Highways England has the best information about the network and should use that to shape the debate with DfT, particularly around the relative benefits of new large schemes versus investing in maintenance and renewal of the existing network.

In the absence of SRUS or with only partial data, what other data sources could be used and how would they be used?

It seems likely that there will be limited data on which Highways England's performance against the Road User Satisfaction KPI can be monitored for an extended period of time – certainly for the current reporting year (2020-21) and with implications for 2021-22. During this period, we suggest that it would be appropriate for ORR to consider placing weight on multiple sources of evidence, rather than relying on any one source.

Potential alternative sources that ORR might consider include:

- Highview.
- Highways England's other customer satisfaction-related performance metrics.
- Highways England's delivery of the customer service plan.
- Customer Audit Reports of roadwork schemes.

None of these alternative sources are perfect, but we recommend placing the most weight on Highview because it is the best available alternative quantitative indicator of customer satisfaction, consistent with the principle that performance metrics should measure *outcomes* where possible. There are some important differences between SRUS and Highview that drive different results. The difference between them appears to be relatively stable over time, and we estimate that the likely difference over the course of 2020 is between 2–3.5 percentage points. Given that the latest overall Highview experience score was 79.5% for December 2020, it would imply that SRUS would have tracked at between 81.5%–83% at that time, roughly in line with the Company's 2020-21 target of 82%. Ultimately ORR will need to consider further how to combine available sources of insight as part of its assessment.

We also suggest that ORR applies an adjustment for the recent increase in Highview satisfaction due to the "windfall" effect of less congested conditions during 2020. Estimating the size of such an adjustment is analytically

challenging, but we estimate that a downwards adjustment of around 0.5 percentage points to Highview (on a 12 month average basis) might be a proportionate and pragmatic solution based on data made available to us.

What are the potential effects of using an online survey rather than face-to-face on achieving the existing targets?

Much of the literature which compares online versus telephone and face-to-face survey methods are concerned with sample differences and how representative the sampling is of the target population. In general, online respondents are more likely to be younger, male, more educated and have higher incomes. But we understand that Transport Focus has found the opposite to be true during the early testing of the online SRUS survey method – i.e. that it was getting a higher response rate from an older population and was finding it more challenging to recruit responses from younger age groups. This is consistent with a general conclusion that methodological effects can vary by study, depending on the issue, sampling approach and question design. We are not aware of any studies which have specifically reviewed the evidence of the impact on customer satisfaction surveys such as the SRUS.

It is too early to quantify what the impact of the move online might be on SRUS, particularly since the long-term mix of online versus face-to-face interviews has yet to be established. The early ‘push to web’ pilot results show a significant reduction in overall satisfaction – largely due to an increase in ‘neither / nor’ responses rather than an increase in dissatisfaction. More significantly, at this early stage (given lockdowns) it seems that Transport Focus will be challenged to recruit a quantum of monthly responses that are comparable to the face to face method.¹

Transport Focus will need to ensure that the ‘push to web’ method can obtain a representative sample that is of sufficient size and is capable of being generalised to the SRN user population. In principle, the ‘push to web’ method should not impact overall satisfaction, but these early results might raise new questions around the survey design, e.g. is the neither/nor response option right for this format, or whether the overall satisfaction question can be improved so that it is more difficult for respondents to “sit on the fence”. It is not for ORR to advise Transport Focus on the survey method, but ORR will need to ensure that it understands the changes and how it affects the KPI going forward.

If Transport Focus is satisfied that the sample is robust, then these early findings might raise bigger questions about how users view the SRN. For example, further investigation may be required into the specific drivers of the change in the percentage of respondents ‘feeling safe’ (also reduced under the ‘push to web’ method). In our opinion, ORR should consider these issues further once there is at least six months of emerging data from the relaunched survey (where the response levels are closer to pre-Covid volumes), and potentially review the survey results in further detail after a full year of operation. In the meantime, ORR might continue to explore comparisons with Highview data, which seems more consistent with the ‘face to face’ SRUS results.

What are the options for setting the road user satisfaction targets post 2021-22?

Once restarted, SRUS will need to be re-baselined to reflect any significant impact on the scores resulting from the move online. Therefore, it is too early to set definitive SRUS targets for 2022-23 onwards, but ORR can now consider potential issues and approaches.

Any analysis of the potential trajectory for the SRUS satisfaction metric for 2022-23 and beyond must consider the post Covid-19 context and the potential impacts on survey scores, e.g. changes in traffic structure and flows, and the profile of investment that Highways England must deliver over the remaining years of RP2 – as any expected increase in roadworks will act as a headwind to Highways England’s ability to achieve year-on-year improvements.

Once SRUS has been re-baselined, ORR should consider the available evidence to advise DfT on an appropriately stretching but achievable set of targets for 2022-23 and beyond. This might include:

¹ Observation based on results reported in Transport Focus (24 February 2021) “SRUS – restart after Covid-19 suspension”. We understand that these are weighted data and that the ‘push-to-web’ method has a similar target volume as the ‘face-to-face’ method, so there may be scope to improve response rates and therefore the volume of monthly responses over time.

- comparative analysis between Highways England regions to identify potential for “catch-up”, incorporating some proportionate adjustments to ensure a better “like-with-like” comparison; and
- comparisons with longer-term customer satisfaction trends in other transport modes.

We recognise that comparisons between transport modes should be treated with caution because of the different characteristics of e.g. a timetabled rail service and the SRN. But more importantly, when considering options for the trajectory of the SRUS target for 2022-23 and beyond, we consider that it is reasonable to draw comparisons about *trends*, as opposed to absolute levels of satisfaction (noting that, in any case, the starting point for SRUS should be re-baselined post-Covid). On that basis, we observe that, across those modes where satisfaction improvements have been sustained, average annual improvements of around 0.5 percentage points per year are possible.

Summary of recommendations arising from our review

Ref	Issue	Recommendation
A1	SRUS processes	Once the survey has been relaunched, ORR should continue to monitor how Highways England is improving its use of SRUS to measure and demonstrate the effectiveness of the actions it takes to improve customer service on the network.
A2	Regional sharing of best practice	In the context of understanding regional differences in SRUS performance, ORR should follow up on this study to obtain more detailed examples to demonstrate how Highways England is disseminating customer satisfaction learning and best practice between its regions.
A3	Line of sight	ORR should satisfy itself that Highways England followed a clear and logical process to develop its Customer Service Plan, including that there are clear links back to SRUS, and should review how the Company has performed against those commitments.
A4	Finding the right balance	We recommend that ORR continues to engage with both Transport Focus and Highways England, to ensure that the right balance is struck between less noticeable but gradually compounding marginal gains and the ‘big ticket’ items which often receive the most management attention.
A5	Links between recurrent delay and SRUS	Given that ‘satisfaction with journey time’, ‘traffic level’ and ‘actual vs expected journey time’ are the most important drivers of overall satisfaction, ahead of RP3 ORR should satisfy itself that Highways England is exploring whether there are affordable options which help (at least at the margins) to reduce the impact of recurrent delay, which is by far the largest component of delay.
A6	Links between journey planning information and SRUS	Given that users have growing expectations of the quality of journey planning information, we recommend that ORR should engage with Transport Focus, Highways England and other relevant stakeholder groups to understand whether there is more that could be done to help road users plan their journeys in advance to avoid unnecessary delays and improve customer satisfaction.
A7	Driving the agenda for RIS3	Highways England has the best information about the network and should use that to shape the RIS agenda with DfT. Specifically, we recommend that Highways England should consider how best to use this information to drive a debate on the relative benefits of new large schemes versus investing in maintenance and renewal of the existing network.
B1	Online SRUS survey	ORR should keep abreast of any methodological developments to SRUS so that it has a good understanding of the potential impacts of any new changes when the survey restarts.
B2	Monitoring without SRUS	ORR should consider the alternative available sources further, but it will need to adopt a pragmatic approach. ORR might consider some combination of sources, but we recommend using Highview as the primary alternative source, consistent with the principle that performance metrics should measure outcomes where possible, and because it appears to be the best (however imperfect) available indicator for customer satisfaction.

Ref	Issue	Recommendation
B3	Highview	If ORR decides to base at least part of its assessment on Highview, then it should consider whether there would be value in any further, more detailed analysis of the differences between SRUS and Highview. For example, it may be worth exploring trends in the underlying sample (e.g. journey purpose; regional breakdown of responses) and identifying the scale of those differences with SRUS, which will allow ORR to present a caveated but pragmatic analysis of customer satisfaction in its annual assessment.
B4	Covid-19	As part of its assessment of performance, ORR should consider how it might adjust the evidence to account for the change in traffic flows as a result of Covid-19 lockdown measures, which are likely to have had a positive “windfall” impact on satisfaction scores during 2020.
B5	Re-baselining SRUS	Early push to web’ pilot results suggest that overall satisfaction will need to be adjusted for the change in survey method. But first Transport Focus needs to obtain a higher monthly response rate and ensure that the sample is representative of the general user population. ORR should review this issue further once there is at least six months of emerging data from the restarted SRUS survey at a response rate closer to pre-Covid levels.
B6	SRUS targets post 2021-22	Once SRUS has been re-baselined, ORR should consider the available evidence to advise DfT on an appropriately stretching but achievable set of national-level targets post 2021-22. This might include: <ul style="list-style-type: none"> • comparative analysis between Highways England regions to identify potential for “catch-up”, incorporating some proportionate adjustments to ensure a better “like-with-like” comparison, and • comparisons with longer-term customer satisfaction trends in other transport modes.

INTRODUCTION AND BACKGROUND

Performance measures for RP2

For Road Period 2 (RP2) Highways England has agreed specific performance metrics with DfT on which the outcome of “meeting the needs of all road users” will be measured, and which ORR will monitor:²

Key Performance Indicator	Road User Satisfaction	Achieve 82% overall SRUS satisfaction in 2020-21 and 2021-22, with year on year increases in following years.
Key Performance Indicator	Roadworks information	Achieve 90% accuracy of road closure information seven days in advance of works by 2024-25, with an increasing trajectory of improvement through RP2 from the level of performance achieved at the end of RP1.
Performance Indicator	Electronic signage	Timeliness of information provided to road users through electronic signage measured as the average time taken to set a signal.
Performance Indicator	Ride quality	Subset of the pavement condition metric which captures surface quality. Improved metric to be developed during years 1 and 2 of RP2, and be in place for year 3.
Performance Indicator	Diversion routes	Working with local highways authorities to review diversion routes for unplanned events.

The Performance Specification also contains several **commitments**, where Highways England has undertaken to:

- Review SRUS performance in year 2 of RP2 to determine the road user satisfaction targets for post 2021-22.
- Develop with Transport Focus during RP2 a measure of ride quality which reflects road users’ experience of the network.
- Investigate expanding the scope of the timeliness of electronic signage information PI to potentially include the time taken to adjust and clear signs.
- Work with Transport Focus to develop satisfaction surveys for cyclists and pedestrians, and separately for logistics and coach managers, that can be used as the basis of a performance indicator later in RP2.
- Investigate expanding the scope of the working with local highways authorities PI to include diversion routes linked to planned roadworks.

The Strategic Road Users Survey

The Strategic Road Users Survey (SRUS), administered by the independent watchdog Transport Focus, collects insights from c. 9,000 road users across England on their satisfaction with the roads managed by Highways England.³ The SRUS was formally launched in April 2018 as a successor to the National Road Users’ Satisfaction Survey (NRUSS); with the two surveys running concurrently until March 2020. The SRUS has an improved methodology and collects insights from four times more road users than the NRUSS, with the aim of providing Highways England and others with better insights to understand what drives road user satisfaction.⁴

Topics covered in the survey include: journey time; surface quality; roadworks management; feelings of safety; and overall satisfaction. The SRUS has been developed to provide the official measure of overall satisfaction for the strategic roads network for the period 2020-25 (the second Road Period, or “RP2”). Each month the SRUS gathers the views of c. 750 road users about the last SRN journey they made in the preceding 28 days. The format is a

² Department for Transport (March 2020) “Road Investment Strategy 2: 2020–2025” available [online](#)

³ Transport Focus’ data hub shows around 8,600 responses for the 12 months to March 2020

⁴ National Road Users’ Satisfaction Survey 2018-2019, available [online](#)

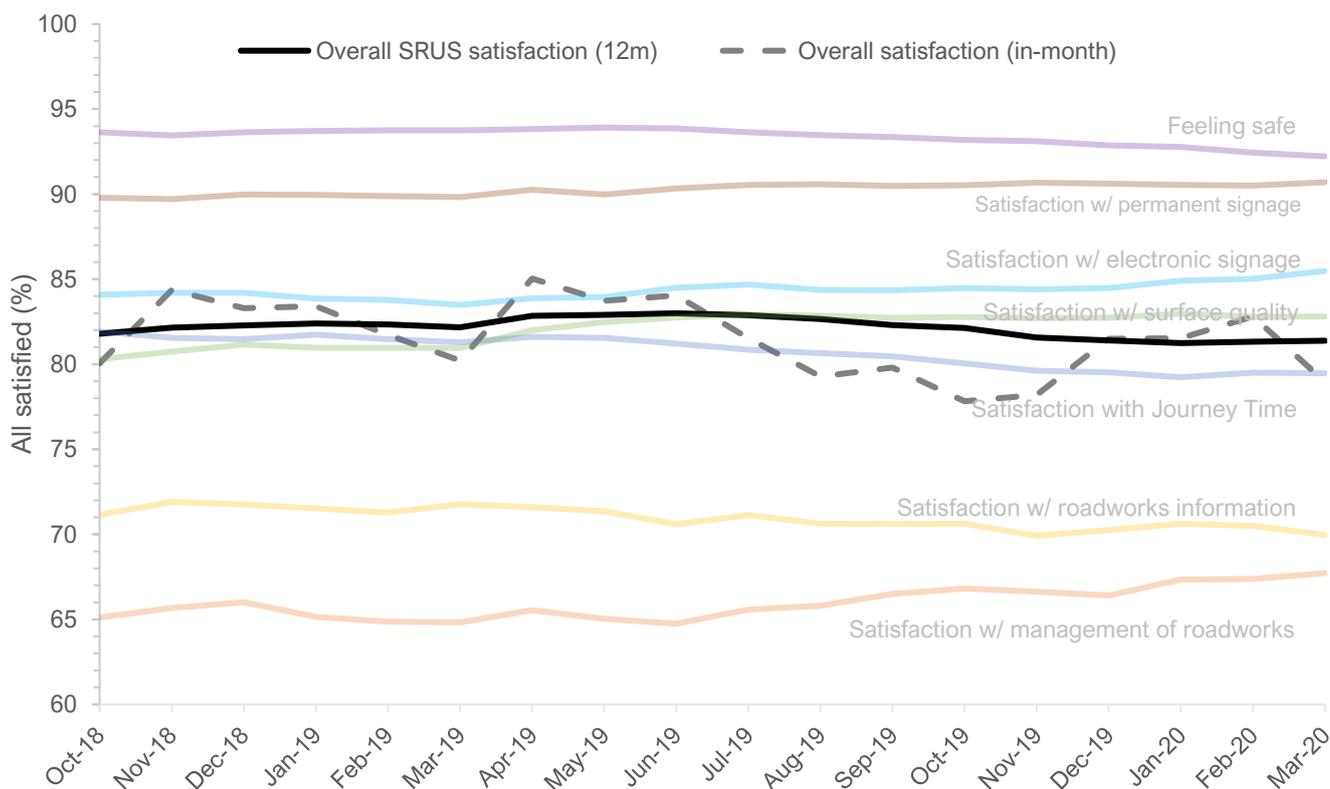
continuous survey with the results published every month. The SRUS has been designed to achieve at least 100 responses per annum for the 35 most heavily used roads in the SRN.⁵ The SRUS employs face-to-face interviews conducted at 800 locations, which are based on the following sampling method designed to align with the driving population across England:

- **Main Sample:** 7,000 responses using Lower-layer Super Output Areas.
- **Boost Sample:** 1,000 additional responses to ensure 11 more roads achieve 100 interviews per year.
- **Probabilistic Boost:** Increases the probability of asking about a medium or lower usage road for the instances when more than one SRN road is used to make a journey (which is 60% of the time). Increases the number of roads achieving the 100 interviews target.
- **HGV Boost:** Target of 1,000 more HGV respondents to allow robust separate analysis of this subgroup. Kantar undertakes these interviews as part of their face-to-face omnibus interviews, using the same survey questions and map as the SRUS.

The sampling method includes quotas attached at the sampling stage to ensure the aggregate of the gender, age, and work status proportions are representative of SRN users. Results are weighted to ensure appropriate representation of vehicle mileage across the strategic road network.⁶

A key aim of the SRUS is to provide a robust reportable metric of overall satisfaction to measure Highways England’s annual performance against a target for RP2. The latest overall satisfaction data showed that 81.4% of users were very or fairly satisfied with their last journey⁷ The overall satisfaction results are accurate to +/- 1.0% at a 95% confidence interval in any year, with year-on-year change accurate at 95% confidence down to +/- 1.3%.

Fig 1: Headline SRUS satisfaction trends (October 2018 to March 2020)



Source: Transport Focus data hub

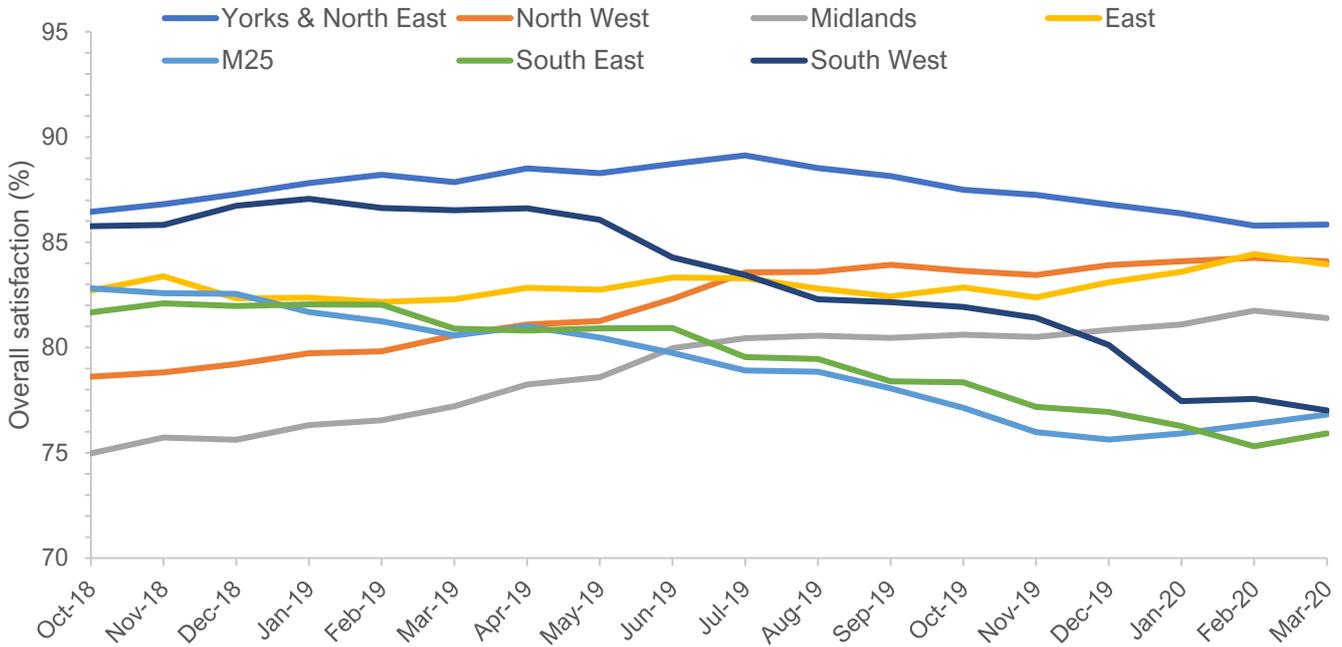
⁵ SRUS Analytical Assurance Report 5 November 2018

⁶ Strategic Roads User Survey 2018/19 Summary

⁷ 12 month rolling average to March 2020

Regional results (shown in Fig 2 below) are reliable to +/- 2.9% at a 95% confidence interval, with year-on-year changes detectable at 95% confidence down to +/- 4.0%.

Fig 2: Regional comparison of overall SRUS satisfaction trends (12m rolling average, October 2018 to March 2020)



Source: Transport Focus data hub

The SRUS improves upon the NRUSS by asking about specific SRN roads with more certainty about location and distance travelled due to the embedded map utilised in SRUS interviews. Other differences include: the overall satisfaction question is standalone in the SRUS, whereas the NRUSS used a composite of other questions; answers to the SRUS are capped at the last 28 days, whereas the NRUSS cap is twelve months; and the NRUSS was not weighted regionally to driving population or to SRN usage.

Scope of this review

The SRUS has been interrupted by the Covid-19 pandemic. Survey activity was curtailed in the months of February and March 2020, reducing the sample size of that period by around 500⁸ and has remained subsequently suspended on safety grounds. Due to the uncertain timeframe over which social distancing guidelines may stay in force, Transport Focus is moving SRUS online: members of the public will be contacted at random via post with an invitation to complete the same (or substantially similar) SRUS survey via a dedicated SRUS web page. At the time of writing this Final Report, we understand that the online survey will restart with survey invites issued from March 2021, subject to a final sense check of the Covid-19 situation at the time.

But, despite the suspension of SRUS during 2020, there are two years of data, collected in parallel to NRUSS, up to the start of RP2 that form a substantial body of intelligence. ORR expects Highways England to build on work from RP1 and gradually develop clearer links between the actions it takes and the interests of road users, to monitor the impact of these actions on key indicators (including SRUS satisfaction), and to ensure that best practice and lessons learnt are shared across its regions to drive up performance.

ORR recognises that progress may be hindered in the near term by COVID-19. But it will continue to monitor the delivery of Highways England’s customer service plans to ensure that the progress made in RP1 is built upon in RP2. Key questions were set to guide our review under the following three headings, shown in Table 1 below.

⁸ Strategic Roads User Survey 2019/20 Summary

Table 1: List of questions in the agreed study scope

How does Highways England use SRUS and other insights to develop and deliver its customer service strategy?

1. How has HE developed its processes to analyse SRUS results, recognizing that SRUS is a new survey?
2. How is the SRUS embedded into HE's business processes?
3. What are the key drivers of satisfaction as measured by SRUS, and how does this compare across Highways England and Transport Focus?
4. What other sources of insight does Highways England use, and how are they used to develop its customer service plans?
5. From Transport Focus' perspective, are the key customer service issues being adequately addressed by Highways England delivering the proposals in their customer service plan?

ORR monitoring of customer satisfaction in 20/21 and 21/22 without SRUS

6. In the absence of SRUS or with only partial data, what other data sources could be used and how would they be used?
7. What are the potential effects of using an online survey rather than face-to-face on achieving the existing targets?

Target setting for 22/23

8. What are the options for setting the road user satisfaction targets post 2021-22?

To answer these questions, we carried out several group and one-to-one interviews with Highways England staff and senior managers with responsibility for customer service. We also interviewed a senior representative from Transport Focus to gather its views on the questions listed above. We are grateful to all involved for their time and assistance.

Highways England also provided several documents to support our review and responded to some of our questions via email correspondence. Where this evidence has been used to support our findings, it is referenced in the footnotes.

The report is structured as follows:

- **Part A** considers the first five scope questions listed above and is directed towards answering the overarching question “how does Highways England use SRUS and other insights to develop and deliver its customer service strategy?”
- **Part B** considers scope questions 6, 7 and 8 as listed above, and is directed towards advising ORR on the options for monitoring road user satisfaction for the 2020-21 reporting year up to the end of RP2.
- We then set out a summary of the **main recommendations** made in the report.
- Finally, **Appendices A to C** contain useful background evidence which is referenced in the report.

Throughout the report, the phrases “road users” and “customers” are used interchangeably.

PART A: HIGHWAYS ENGLAND'S USE OF SRUS & OTHER INSIGHTS TO DEVELOP AND DELIVER ITS CUSTOMER SERVICE STRATEGY

In this Part we present the evidence provided by Highways England and our analysis in respect of the first group of scope questions set by ORR (see Table 1), which cover how Highways England uses the SRUS and other customer insights to develop and deliver its customer service strategy. It is structured as follows:

- Section A.1 considers the progress Highways England has made in developing its SRUS-related processes.
- Section A.2 considers how Highways England has embedded SRUS into the business.
- Section A.3 considers Highways England's understanding of the key SRUS drivers.
- Section A.4 considers what other sources of insight Highways England uses to develop its customer service strategy.

Lastly, we consider Transport Focus' views on whether the key customer satisfaction issues are being addressed by Highways England's customer service strategy, and we set out our conclusions and recommendations in relation to the issues raised in Part A.

A.1. HIGHWAYS ENGLAND'S SRUS PROCESSES

One of the key messages we received when we asked how Highways England had developed its processes to analyse SRUS results (i.e. building on those established to analyse NRUSS during RP1) was that it had not been actively thinking about developing already established processes further due to the suspension of the survey. The SRUS only became the basis for Highways England's performance metric for road user satisfaction at the start of RP2 – i.e. March 2020 – and there has been no new data since, although results are available from April 2018.

Highways England said that it was difficult to advance its processes whilst the survey is suspended, but continued to seek insights from other, existing sources of customer data (as discussed further in Section A.4). It also noted that in its view, whilst the SRUS is a fundamental improvement on NRUSS, the key themes were likely to remain consistent – i.e. unaffected both by the transition from NRUSS to SRUS, and by Covid-19. It continues to focus on the delivery of a set of planned actions set out in its annual Customer Service Plan, including actions to improve the provision of information to road users ahead of and during their journey, expanding the use of 60mph through roadworks where it is safe to do so, and improving Highways England's own customer insight capability.⁹

Highways England is seeking to grow organizational awareness of SRUS and engage various partners on its use, and the importance of customer experience more generally, in preparation for the new metric. For example, the Company has trained several analysts from the Chief Analyst Division in the SRUS methodology and data, and there is a designated 'SRUS expert'. Although this team has a wider remit, they form a 'central pool' of analytical resource capable of exploring and generating insight from SRUS data and report directly to the Customer Service Directors representing the SES, Major Projects and Operations directorates.

Highways England has also developed and facilitated wider training on the use of SRUS within the organisation more broadly. This included a session on using and analysing SRUS data, which was delivered with support from Transport Focus, as well as a further training for both national and regional analysts, which was designed and delivered by Highways England. Topics covered within the training included:

- An overview of the SRUS, including the survey design, how it is conducted, and the questionnaire.
- The differences between the SRUS and the NRUSS and why direct comparison is not appropriate.

⁹ Highways England (2020) "Connecting our customers: 2020-21" available [online](#)

- How to interpret SRUS results, including how to use confidence intervals, and the importance of a sufficient sample size.¹⁰

Additionally, Highways England has helped to improve the SRUS Data Hub – the online data explorer and visualization tool hosted by Transport Focus.¹¹ It conducted a survey of the business to understand who uses it, whether it meets their needs, and what could make it better. This resulted in suggestions to Transport Focus, and subsequent improvements, including the ability to visualise time trends within the Hub. An FAQ document is also under development to aid the use of the Data Hub by Highways England staff.

Highways England has also undertaken in-depth analysis of the key drivers of SRUS satisfaction to develop an understanding of the factors that affect performance and form a basis on which it can explore the levers that it has over satisfaction (see Section A.3 below for further description). This key driver analysis has been facilitated by establishing a Data Sharing Agreement to secure regular access to record-level data from Transport Focus.

Highways England additionally undertook a separate deep dive analysis on SRUS over the period 2018-2020, to develop a “baseline” understanding of key trends and to build familiarity with the data, in preparation for the KPI going live. The analysis looked at general trends in relation to overall satisfaction as well as more specific analysis on the effect of roadworks on overall satisfaction.¹² The Company’s analysis reinforces the view that journey time is the key driver of satisfaction. It also found a decline in A-road performance, whilst motorway performance remained constant. In relation to roadworks, overall satisfaction was affected by the perceived amount of time that roadworks add to a customer’s journey. Furthermore, it identified some evidence that smart motorway schemes were having a positive impact, as satisfaction increased on the M6 (relative to the M4), potentially indicating that the delivery of smart motorway benefits on the M6 had increased users’ acceptance of roadworks.¹³

Our observations and findings in relation to the Company’s SRUS processes

In the SRUS, Highways England now has a metric which it believes is more reflective of the company’s performance and more useful in terms of supporting analysis. It is keen to get SRUS back up and running again. Highways England has trained its staff to use SRUS, understands how SRUS differs from NRUSS, and has analysed the key drivers of satisfaction.

Highways England has a set of established processes to analyse the SRUS, much of which was initially developed for the NRUSS, and should be able to provide a timely view of performance once the survey is resumed. The Company’s ability to provide examples of insight or intelligence developed from SRUS or explain how such insight was used in support of business decision-making has so far been limited by the suspension of the survey.

There are, however, examples which demonstrate that Highways England has previously used NRUSS analysis in the way that we would expect it to use SRUS in due course. We have reviewed evidence stating that the North West Region used NRUSS to highlight how the M60/M62 smart motorway project impacted the region’s NRUSS score significantly during the latter stages of construction, which led to a decision to re-programme subsequent smart motorway schemes to limit the impact on users.¹⁴ The company also provided evidence to show how it had used Highview (its internal user experience survey) to explore satisfaction trends on the A30 during the summer of 2020, including a comparison of satisfaction over six stretches to identify local issues.¹⁵

Despite the SRUS suspension, there is good evidence to conclude that Highways England is continuing to improve its understanding of the differences between the two surveys as well as trends in the SRUS data and their significance. For example, Highways England has undertaken cross-region comparison of routes across a number

¹⁰ SRUS training presentation.pptx

¹¹ Transport Focus data hub, available [online](#)

¹² SRUS for board _ exec.pptx

¹³ SRUS for board _ exec.pptx

¹⁴ North West Region Customer Maturity Self Discovery 2019-2020.xlsx

¹⁵ Highview – A30 Extract – August to October – Final.pptx

of key questions (safety, surface, journey time, roadworks, signage, etc), which identified that for some routes, e.g. the A66, recent resurfacing works had supported an increase in the SRUS score the following year.

Overall, we find that Highways England has made reasonable early progress on developing its SRUS processes and a detailed understanding of the survey – i.e. the Company is where ORR might reasonably expect it to be given the current circumstances and the data available. Undoubtedly it has been hindered by the suspension of the survey and so ORR should continue to monitor how Highways England is improving its use of SRUS to measure and demonstrate the effectiveness of the actions it takes to improve customer service on the network.

A.2. EMBEDDING SRUS INTO THE BUSINESS

This section considers how Highways England has embedded SRUS, and customer service more generally, into its wider business processes and decision-making. The section is split into three sub-sections which explain how Highways England is:

- Embedding SRUS internally and developing an internal customer service culture.
- Embedding customer service in the supply chain.
- Reporting on, and monitoring, customer service performance.

A.2.1 Embedding SRUS internally

The most important aspect of embedding SRUS into the Company's culture and decision-making is its status as one of the Company's KPIs, ensuring that it gets regular Board-level attention. The SRUS Satisfaction KPI is also one of the composite KPIs which is used to calculate Performance Related Pay, along with the KPIs for '*More accurate and timely roadworks information*' and '*Incident clearance*'.¹⁶

Given that the Company's performance is assessed using SRUS, it is important that Highways England develops a strong understanding of the key drivers of performance and is able to formulate a plan with "clear line of sight" between the actions that it takes (to operate, maintain and improve the network) and its corporate targets. Highways England told us that it considers customer satisfaction to be well embedded within its Business Plan for RIS2. Additionally, the Company produces an annual customer service plan, which includes a long list of actions aimed at things it can do to enhance its service for customers, continually improve the basics that customers expect, and to deliver a range of key enabling activities to support future improvements¹⁷ – things which it says are collectively aimed at supporting or improving its performance on the SRUS KPI, but also delivering improved service in the round.

Excluding the "enabling activities", the customer service plan contains no fewer than 17 main actions that Highways England will deliver this year. Some of these actions are very clear and logical, e.g. the Company is improving the accuracy of information about road closures so that it is 40% accurate seven days in advance of the work. This will benefit all customers but is particularly valuable for freight and logistics firms who schedule travel in advance and require notice so that they can re-schedule to avoid the costs of unnecessary delays. It is clearly linked to journey time perception and reliability, concepts which Highways England has identified as key drivers of SRUS performance. And the Company has clear ways in which it can measure success – i.e. not only can it measure the accuracy of roadworks information, but it can also track the impact of this action on the satisfaction of professional drivers through SRUS and Highview.

Most (if not all) of the actions set out in the plan relate to issues which we recognise are important to road users in some way. But we raised the following observations in our review which may be worth further consideration by ORR in its future discussions with Highways England on customer service issues:

¹⁶ SRUS satisfaction accounts for a maximum PRP contribution of 10% (of total PRP) within a vesting range of 81.2% to 82.5%.

¹⁷ Highways England (2020) "Connecting our customers: 2020-21" available [online](#)

- 17 is a large number of actions and we expressed concern as to whether and how Highways England had determined that all of these actions were worthy of its focus in the next 12 months, given that customer service issues must compete with other important issues (e.g. safety, scheme delivery) for resources and management attention. Whilst we understand that Highways England has developed the plan with input from Transport Focus, and it has been subject to internal executive-level oversight, ORR may wish to monitor whether the Company is able to sustain substantial progress across all the actions in the plan.
- In some cases, the plan is less clear on the link between the action or commitment identified and SRUS.¹⁸ Given the amount of information provided in the public version of the plan, this observation might apply to roughly half of the actions. Of these, notable examples include:
 - **“Less litter by the roadside”**. The plan contains a set of actions to clean the top 25 litter hotspots at least twice a year, and to enhance the Company’s collaboration with local road authorities on litter clearance. Highways England clarified that the focus on these interventions is a response to customer complaints and is necessary to manage the reputational impacts. It is also a Performance Indicator under the environmental outcome area of the Performance Specification.
 - **“Better digital information”**. The plan contains a commitment to make information about the Company’s roads and services easier and safer, e.g. by helping emergency and responder services locate incidents more quickly by providing marker post information in a more useful format. It is unclear whether this action is prioritised in the plan because it represents “low hanging fruit” / “is the next logical thing to do”, or because it is expected to have a relatively strong impact on SRUS compared to other possible actions. Whilst this may have some impact on journey times, incidents are a relatively small contributor to overall delay on the SRN.
 - **Travel Demand Management trial**. The plan contains only a single action which relates to addressing recurrent delay¹⁹ which, being the largest component of total delay, is a surprise given the importance which is attached to delay in Highways England’s key drivers analysis. Outside of the scope of this review we are aware that Highways England is working on a “delay ambition plan” which remains a work in progress but may lead to additional actions in future.

In these cases, the link to the top drivers of SRUS is weaker although we tried to clarify this link with Highways England through our requests for further information. Highways England emphasised to us that the customer service plan aims to deliver improved customer service in the round (i.e. it is not solely a plan to deliver the KPI target) and the plan intentionally reflects the Company’s increased ambition and the broad range of insights that the Company responds to (e.g. customer complaints and direct engagement with stakeholder representatives).

- Related to these concerns, in some cases there is an apparent lack of specificity in terms of activities and deadlines, and a lack of clarity about how Highways England will “close the feedback loop” to determine what works and what does not. In response to this observation, the Company noted that such information would not be appropriate for an externally published document and is managed through its internal programme. We are not convinced that there is a strong case against transparency in this context, which might instead indicate that the Company does not yet know exactly what it should do to address customer satisfaction in the most efficient way.

To provide some examples to support this observation, we note that:

- **“Better integration with other transport modes and networks”**. The plan contains a commitment to *“work with our partners and stakeholders to improve how our roads connect with other transport modes ...”* and *“make improvements for walkers, cyclists and horse riders based*

¹⁸ Not everything important will be picked up in SRUS. For example, *“making it easier for our deaf and hard of hearing customers to get in touch with us”* is an important action for a group which may be hard to reach through the survey.

¹⁹ Travel demand management trial in the Yorkshire and North-East region to target areas of recurring congestion, with a view to rolling out further if successful.

on what they tell us they want to see”. But it is unclear what this means in practice and what deadlines Highways England has set itself.

- **“Better digital information”**. The plan contains a commitment to *“explore opportunities for sharing information with other providers who support our customers’ journeys. For example, sharing road closure information with satellite navigation providers ...”*. It is unclear whether Highways England has yet developed a more certain plan to deliver on this and what milestones / deadlines are attached to it.

We accept Highways England’s argument that the customer service plan aims to deliver improved service in the round but would expect the main weight of the plan to focus on improving SRUS scores, since this is the Company’s KPI for customer satisfaction. Whilst roughly half of the actions would appear to link back to SRUS in some way, others are a response to a different set of customer priorities and fall into a ‘grey area’ where Highways England possesses a wider range of insights to suggest that they are important to some stakeholders, but it is not clear how the Company has balanced or prioritised these areas over other measures targeted at generating SRUS improvements given the inevitable constraints of resource and management attention.

Overall, we consider that the customer service plan lacks “direct line of sight” between SRUS and the actions as set out in the plan. Given that SRUS is the Company’s customer service KPI, we consider that it is reasonable for ORR to ask Highways England how it put together its customer service plan and to explain how it sought to prioritise the actions in the plan to focus on delivering the highest SRUS gains (e.g. by using evidence which tries to estimate or quantify the potential impacts on SRUS to show that it is prioritising the actions which might be expected to have the greatest impact or, where this evidence does not yet exist, to explain how it will close the feedback loop to learn which actions have the most positive impact on customer outcomes).

The responses given by Highways England did not demonstrate the “line of sight” that ORR might reasonably expect the Company to provide, and as such we recommend that ORR uses its end of reporting year discussions with Highways England to:

- continue questioning the Company on the genesis of the actions in the action plan;
- understand how the Company prioritised the actions to maximise the potential impact on SRUS, acknowledging that this should be balanced with other customer priorities that the plan addresses, and
- ask what progress has been achieved against these actions over the past year.

A.2.2 Developing an internal customer service culture

Although the overarching question is about SRUS, we consider it important to recognise that Highways England is growing a corporate ownership and culture of customer service more generally across the business. For example:

- Each region uses an internal “self-discovery” exercise to measure Customer Experience Maturity across 20 different customer service-related criteria. Highways England has seen an upwards performance trajectory across the business and whilst there is no target for the business as a whole, it aims for continuous improvement. Every region has an improvement ‘pathway’ or trajectory with planned activities to help it achieve a higher score. Appendix B provides additional detail on the Customer Experience Maturity exercise, including an example from the North West region.
- Customer service teams are encouraging others to learn how to tackle satisfaction issues through a “Centre of Excellence” which coordinates sharing of best practice and expertise across the regions, identifies “regional exemplars” and encourages innovation where regions are already scoring highly. It has also established a national network of Customer Service Managers who discuss customer service performance on various measures each month. It explained that these conversations necessarily translate into the identification and sharing of best practice, and gave an example of a trial currently underway in the East region (where new roadside signs are being used to better inform customers about the diversion route

they are on) where best practice will be disseminated via Regional Engagement Leads to ensure that these working practices are adopted consistently across the business.²⁰

- It has developed, and recently revised and enhanced, a customer segmentation model, to build a broader and deeper understanding of its customers and how they differ in attitudes, behaviours and priorities. Amongst other uses, the revised segmentation model will help the Company to develop a deeper understanding around drivers of customer satisfaction and will help it to improve the targeting of information campaigns and customer-facing services.²¹

A.2.3 Embedding customer service in the supply chain

The supply chain is often at the interface between customers and the management and operation of the SRN. Highways England is particularly reliant on the contractors who design and deliver improvement schemes on their behalf, to design and deliver them in a way which minimises the impact on road users and local communities, and to ensure that, where required, roadworks are well managed.

To help its contractors plan their schemes in a way which is sympathetic to road users and local communities, and to spread best practice more generally, Highways England has developed a guidance document known as the “Roadworks Implementation Toolkit” using insights developed from its Customer Panel. The Toolkit outlines 20 customer-focused principles for roadworks schemes and provides advice on applying these principles to road schemes.²² We set out what these 20 customer principles are in Appendix A.

Each of the principles represents an action that the project team can take to improve the customer experience, or perception of, roadworks, and has been identified through Highways England’s customer research. The Roadworks Toolkit is a guidance document, but Highways England expects project teams to actively address its principles on all schemes or, where it cannot be applied, for the project team to explain its reasons for not doing so.²³ Where the principles are applied appropriately, Highways England’s research indicates that they should improve road user satisfaction as measured by SRUS.

²⁰ Email from Highways England to CEPA dated Wednesday 3 February 2020.

²¹ Revised segmentation – general slide deck.pptx

²² Highways England (November 2020) “Roadworks: A customer view – Implementation toolkit – Version 3.0”.

²³ It is part of the Project Control Framework (PCF) for Major Projects schemes that contractors must demonstrate how they have addressed the principles set out in the Roadworks Implementation Toolkit at each stage of the control process. For Operations schemes, the document states that “*consideration of these principles is required as part of the 3D (develop, design, deliver) process*”.

Box 1: Customer service within project teams – M1 Smart Motorway Scheme J13-16

Highways England is converting the existing section of the M1 from J13 at Milton Keynes South to J16 at the Upper Heyford Interchange into a smart motorway. The project involves converting the section into four lanes of traffic with no hard shoulder and installing 38 new (and two upgraded) emergency areas. The aim is to reduce congestion, improve travel times and reliability between Bedfordshire, Milton Keynes and Northamptonshire.

The scheme is being delivered on behalf of Highways England by a Costain–Galliford Try (“CGT”) joint venture. During the works planning (Nov 2017), Highways England required CGT to make a “deep dive” presentation, to demonstrate how their scheme design and management would meet the 20 customer principles for roadworks and the actions they would take to implement them. CGT gave the example of Principle 4 (“lane width”) in response to which they had planned sections of works with two lanes of unchanged width and a third narrower lane, as is preferred by road users. As part of the planning stage, CGT also had to identify and create a communications plan for the main employers and customers using the route.

The scheme trialled 60mph running through 60km of carriageway using three narrow lanes. During the trial period non-compliance with speed restrictions fell by 28% and the proportion of HGVs found close following reduced by 8%.²⁴

Throughout the duration of the construction works, CGT provides a weekly traffic management update which is distributed to key customers such as Royal Mail, Amazon and other large logistics firms. Road closures are notified to them in advance and sometimes CGT has been able to incorporate changes around key dates / diversion routes at the request of these customers.

CGT use monthly customer audits to identify issues and find improvements in response to feedback. For example, if there are issues with signage, they will review the feedback and agree actions with the traffic management team, including removing excess traffic management from the site if appropriate.

CGT is also responsible for building relationships with local stakeholders and representatives of communities affected by the scheme, identifying local issues and concerns, and is expected to take the lead in “owning” the solution. For example, it has responded to concerns around diversion routes through local villages, has implemented solutions where there were complaints about speeding vehicles using the diversion routes, and has flexed working hours to minimise noise disruption.

Highways England monitors CGT’s progress and implementation of commitments at regular project committee meetings, with performance reported on a monthly basis to Highways England senior management.

Source: Interview with Regional Lead Sponsor for the Smart Motorway Programme and Costain Community Relations Manager

The Toolkit contains successful case studies of the principles in action. One example is replicated in the box below.

Box 2: M1 Smart Motorway Scheme J23a–25

During construction on this scheme, the Major Projects customer services division trialled using portable variable message signs (pVMS) to display travel times, and other information, for diversion routes.

They tested messages giving distance and travel time to the end of diversion routes, and diversion-specific messages leading up to, and when, full closures were in place.

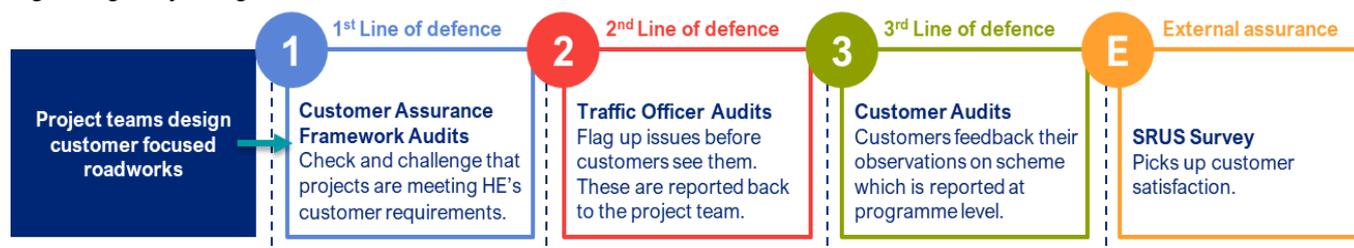
Highways England found that customer feedback on the messages was positive. The majority of road users felt they were well informed in advance of future closures with diversion routes, and while the diversion routes were in place. As a result, the travel time Major Projects instruction (MPI) has been updated to include this as requirement on all Major Projects schemes.



Although there is an absence of SRUS results for 2020, Highways England also provided evidence to explain how it has been trying to embed a customer service ethos into project teams and the management of roadworks more generally. Within Major Projects, the Company operates “three lines of defence” to ensure that customers are considered throughout scheme design and delivery (see Fig 3).

²⁴ Highways England (November 2020) “Roadworks – a customer view” Version 3.0 – Page 19

Fig 3: Highways England's 'Three Lines of Defence'



Source: Highways England

As a first line of defence, suppliers working on schemes managed by the Major Projects directorate are measured and scored against the Customer Assurance Framework (CAF). The CAF is a tool for governing customer satisfaction in the Project Control Framework (PCF) throughout a project's lifecycle. It contains a list of customer requirements (or "opportunities") that represent things that Highways England asks its suppliers to do on behalf of its customers. Suppliers are asked about their approach against the customer requirements in the CAF at the beginning or end of each PCF stage and a score is applied based on the standard they have described. Highways England then states that project CAF scores are then reported monthly at both project and programme committees.²⁵

The evidence we reviewed suggests that where a scheme demonstrates that their approach is either novel or best practice, Highways England captures this knowledge and shares it across programmes on a quarterly basis. Conversely, where a project falls short of the standards that Highways England expects, it will put in place an action plan to encourage the project team to reach the required standard, and the customer lead for that programme works with the scheme to meet the actions identified before the next CAF audit (usually in 6 months' time).

As a second line of defence, Highways England uses its Traffic Officer patrols to carry out regular checks of the scheme, identify issues which might negatively affect the customer experience, and report these back to the project team. And, as an independent third line of defence, the Company commissions Ipsos MORI to carry out "mystery shopper"-style customer audits (see Appendix C). As at the end of 2020, these customer roadworks audits had been paused but Highways England plans to resume auditing when it is safe to do so.

It is also worth noting that Highways England monitors the performance of suppliers against customer service metrics (such as CAF scores) and requirements in their contracts. For example:

- For suppliers delivering through the Regional Delivery Partnerships (the framework which Highways England has developed to procure the design and construction of schemes in the Regional Investment Programme) customer service is one of the measured aspects of 'performance' which can influence the future allocation of work between suppliers on the framework.
- For the regional Maintenance and Response contracts, performance is measured via metrics which include measures for both customer satisfaction and customer safety. Unacceptable quality management is addressed via the accrual of Quality Management Points. If the contractor persistently or materially fails to meet any of the performance requirements Highways England can terminate the contract.²⁶

Finally, as part of its approach to managing and developing its supply chain, Highways England is supporting its major suppliers and project teams to "self-assess" their own level of internal customer service maturity. This is not a static, one-off exercise: project teams are encouraged to continually update their assessment and plot a trajectory of improvement.

²⁵ Customer Assurance Framework – MP Final.docx

²⁶ Email from Highways England to CEPA dated Wednesday 3 February 2020

A.2.4 Performance reporting and monitoring

Routine reporting and clear accountability are also important factors in embedding a performance-focused culture. From the documentation provided by Highways England to support our review, we understand that at a regional level:

- Each region has a Customer Working Group (CWG) which owns a “regional customer plan” and is presented with regular updates on NRUSS / SRUS performance and occasional in-depth analysis, as well as recent performance on the roadworks accuracy KPI. The CWG is attended by regional project managers, the regional customer service manager, supply chain representatives, and the central Highways England customer service team.
- Regional NRUSS and SRUS performance is also presented to Highways England’s Regional Boards to inform discussion along with incident clearance performance. Representatives from Transport Focus have occasionally attended Regional Board meetings to provide specific insight and customer feedback.²⁷
- The North West Region reports that it is developing a regional customer metric pack which will collate key metrics along with other ‘customer metrics’ in a consistent way for all North West regional forums.²⁸

Highways England also told us that within the Major Projects directorate, each scheme has a customer programme lead who will monitor scheme performance against KPIs such as ‘Delay in works’, ‘Customer audits’ (see below) and CAF scores (see Section A.2.3 above). If customer satisfaction scores are identified as a concern, the programme lead would escalate the issue to the accountable (Major Projects) Customer Service Director who would establish an appropriate resolution and/or mitigating actions from the project. As noted above, projects that perform badly are subject to an improvement plan monitored by Highways England customer programme leads.

We understand that regional and programme-level performance is then collated centrally and reported to the overarching Executive Customer Service Group (ECSG) along with Highways England’s organisation-wide progress against the Customer Service Plan milestones. The ECSG meets monthly to provide leadership and advocacy for customer issues, is accountable for driving customer service improvement, and is chaired by the Chief Highways Engineer to ensure Board-level accountability. Amongst its other responsibilities, the ECSG monitors performance against the SRUS Satisfaction KPI, reviews how the data is gathered and recorded, commissions deep dive research, and explores “innovative solutions to deliver an improvement in customer focus both internally and externally and promote a culture that embraces customer service thinking”.²⁹ Minutes of the ECSG are reported to Highways England’s Executive Committee.

Extracts from recent performance reports provided to ECSG are shown in Box 3 below.

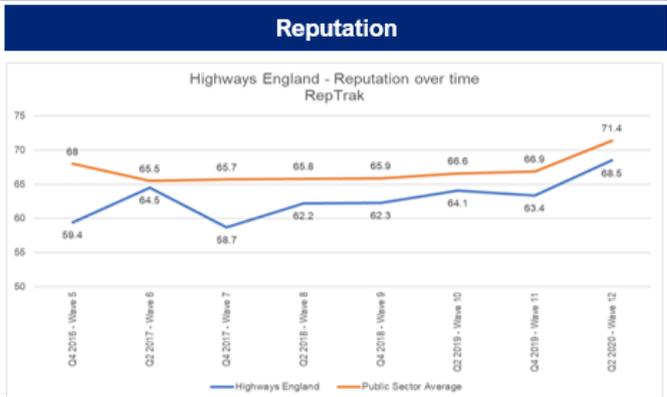
²⁷ North West Region Customer Maturity Self Discovery 2019-2020.xlsx

²⁸ North West Region Customer Maturity Self Discovery 2019-2020.xlsx

²⁹ Executive Customer Service Group ToR_v0.2.pdf

Box 3: Example performance report provided to the Executive Customer Service Group (ECSG)

KPI	Summary of target	Current position update	RAG status
Road user satisfaction	Target: Achieve an 82% user satisfaction score in 2020-21 and 2021-22 with year on year increases in following years. 2019-20: 81.2%	November: The data collection that feeds the SRUS is currently paused due to C-19 restrictions. Transport Focus have developed a push to web alternative, where they write to customers to request completion of an online survey. Initial development has been successful. Transport Focus started the pilot survey using this methodology this month, with first results back in December / January.	N/A



Reputation

- In Oct 2020 we have seen a drop in awareness for HE compared to Sept from 96% to 94%, however this is in line with earlier months. 17-34 year old customers have lower awareness than older customers.
- Since Nov 19 we have seen preference for standard motorways over smart motorways significantly increase from 31% to 46% in Oct:
 - Preference for standard motorways is mostly driven by 35-53 year old customers (40% in Oct 20) and 55+ year old customers (58% in Oct 20)
 - Preference for standard motorways is likely driven by more customers believing that standard motorways are more reliable (38%), offer a better driving experience (37%) and make them feel safer (46%).
- During winter, customers are most likely to mention vehicle rather than journey checks with checking tyres and pressure the most mentioned check.

Source: Highways England

Summary of our findings in relation to embedding SRUS

Overall, we find evidence to suggest that Highways England has made a good start at embedding SRUS into the business. It has taken on-board the key drivers analysis, translated these insights into useful tools such as the Roadworks Implementation Toolkit, and is encouraging the teams which operate and work on the network to care about customer service in general.

Our main concern is that “line of sight” – i.e. a clear connection or golden thread – between SRUS and the key drivers analysis that Highways England has done, to the individual actions that Highways England sets out in the Customer Service Plan, is sometimes lacking.

The Company understands that customer perceptions around journey times and roadworks, feelings of control over their journey, and provision of information ahead of the journey are key to overall satisfaction. And in these areas it is more obvious that Highways England has developed a customer service plan which includes a set of actions aimed at things it can do better and where it can show evidence to demonstrate the impact on SRUS performance.

But in other areas of the plan it could not articulate how the link with SRUS had been identified and why e.g. actions to support better integration with other transport modes are prioritised alongside improving the accuracy of roadworks information. It is positive that the Company responds to a range of customer insights, but it also needs to be able to balance these demands given that customer satisfaction activity must compete with other important priorities (e.g. safety, scheme delivery) for resources and management attention. It suggests to us that the Company has struggled to a targeted number of focus areas that it should prioritise its efforts on this year, which is also perhaps reflected in the lack of clarity in some of the actions listed, both in terms of *what* Highways England will do and by *when*.

Where clarity is lacking, we recommend that ORR continues to monitor how Highways England established its priorities during the development of the customer service plan in relation to SRUS, and establish what progress has been achieved against these actions over the past year.

A.3. UNDERSTANDING KEY DRIVERS OF SATISFACTION

This section looks at the work Highways England has done to understand the key drivers of overall satisfaction, as measured by SRUS, and how this aligns with the views of Transport Focus.

Both Highways England and Transport Focus have previously conducted key driver analysis to understand what has the largest effect on overall satisfaction. Transport Focus’ analysis, using NRUSS data, highlighted seven key priorities for road users, of which journey time (actual, reliable and predictable) was considered central. The other factors were: roadworks management; incident management; driving speed; signage and information; safety; and other drivers of behaviour.³⁰ During our engagement with Transport Focus, it told us that neither the transition from NRUSS to SRUS, nor the impact of Covid-19, had changed its view of the key priorities for road users since the 2017 report.

Highways England has undertaken more recent analysis using SRUS data. Using a method known as structural equation modelling to estimate the relationship between key journey “themes” or “factors” and overall satisfaction on 2019 SRUS data, Highways England found a particularly strong relationship between “journey times and traffic volumes” and overall satisfaction, and then ranked other themes according to the relative strength of their relationship. The findings from Highways England’s analysis are shown in Fig 4 below.³¹

Fig 4: Key drivers of SRUS satisfaction



Highways England subsequently repeated this exercise using 2019-20 SRUS data and the results were broadly consistent.

An important feature of Highways England’s analysis of key drivers is that it sought to gain a deeper understanding by examining which sub-questions from the survey affect the key drivers themselves, to understand how and where it should prioritise investment. It split survey questions up into key themes, and then measured both the direct and indirect effect of these questions on the key drivers and then how these key drivers affect satisfaction overall. For example, Highways England’s analysis shows that the ‘Journey Environment’ theme is influenced by satisfaction with journey time and the amount of traffic on the road.³²

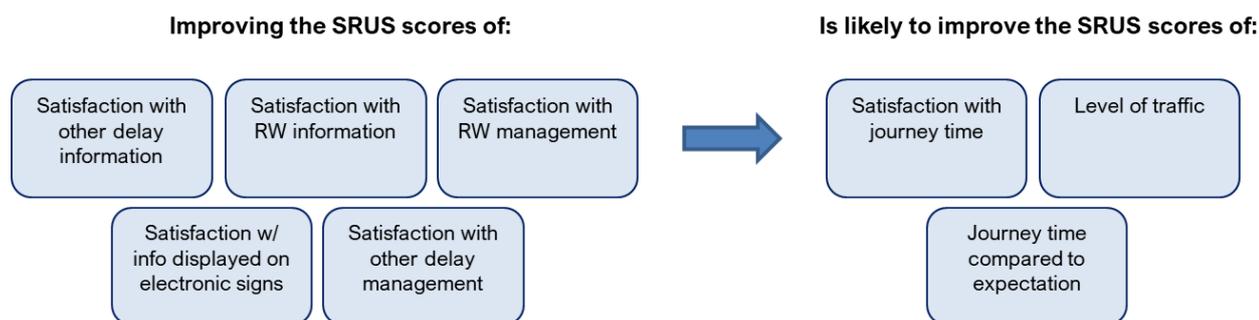
An illustration of Highways England’s understanding of the relationships between drivers which could have indirect effects on overall satisfaction is provided below.

³⁰ Transport Focus (March 2017) “Measuring performance of England’s strategic roads: what users want” available [online](#).

³¹ We have not reviewed this “structural equation” analysis because HE’s results seem intuitive and are similar to the results obtained from Transport Focus’ own analysis of the key drivers of satisfaction (using NRUSS).

³² KDA ECSG.pptx

Fig 5 Contributory relationships between key drivers of overall satisfaction



Source: Highways England analysis

To help illustrate where the greatest potential for improving overall satisfaction lies, Highways England categorised the survey themes on an ‘importance-performance matrix’, which plots the importance of each theme (or driver) according to the key drivers analysis against Highways England’s current performance on that question. The matrix places each theme into one of four boxes (‘tolerate’, ‘improve’, ‘maintain’, and ‘optimise’) and shows that ‘road quality’, ‘other drivers’ behaviour’, ‘delay’, ‘control’ and ‘journey stress’ are all variables with the greatest potential to improve.³³

Highways England has also used other data sources to develop insight into the main drivers of satisfaction. In 2019 and 2020 the Company used its Highview survey to undertake a key drivers analysis of “overall good journey experience”³⁴ and found ‘perceptions of control’ (i.e. feeling in control of journey time, feeling stressed and feeling safe) to be associated with a positive overall experience. It also told us that up until March 2020, the Company conducted regular (quarterly) “deep dive” reviews into one of the 5 components of overall NRUSS satisfaction that made up the headline KPI, to understand what was driving recent performance. This analysis is then used by the Executive Customer Service Group to review performance (as discussed in Section A.2 above).³⁵

Our observations and findings in relation to the key SRUS drivers

We find that views about the key drivers of SRUS satisfaction broadly align between Transport Focus and Highways England, although Highways England identifies a broader range of drivers, particularly in relation to journey times.

In relation to the hierarchy of SRUS drivers, ORR noted that although there was broad alignment between Highways England and Transport Focus on the key drivers of SRUS satisfaction, the analysis on which this view is based (Highways England’s structural equation modelling technique) might understate the importance of particular themes where user satisfaction is currently relatively high, but should not be “taken for granted”. For example, sub-themes such as *permanent signage*, *lighting* and *cats eyes* might have a low statistical relationship overall based on today’s SRN environment (which is relatively safe by international standards) but might have a more significant impact on overall satisfaction if the quality of permanent signage, lighting or cats eyes were to deteriorate, or users expectations of these features were to increase over time.

Transport Focus agrees that Highways England has shown real progress on important drivers, for example on roadworks information, but sees less urgency on more “marginal gains”, for example on fixing signage.³⁶ Transport Focus feels there are realistic actions which would deliver tangible improvement to the user experience in the near term, even if they appear lower on the hierarchy of key drivers.

We recognise that there is a potential tension here, between Highways England seeking out marginal gains and applying its resources and attention to ‘big ticket’ issues where more significant improvement is needed. Elsewhere

³³ KDA ECSG.pptx

³⁴ There may be conceptual differences between ‘customer satisfaction’ and ‘customer experience’, but they we do not consider them to be material in the practical context of this review.

³⁵ Executive Customer Service Group ToR_v0.2.pdf

³⁶ Although we note that Highways England is engaging with Transport Focus on its “Sort My Sign” campaign.

in this report we observe that Highways England has finite resources and management attention, like any organisation, and must focus its customer service activities accordingly. We do not find that the Company has neglected marginal gains at the expense of 'big ticket' items. Rather, the point we seek to make is that Highways England must strike a balance between the two depending, for example, on the effort required to make improvements in areas where satisfaction is weaker, compared to continually improving other areas where satisfaction is relatively high. As such, we recommend that ORR continues to engage with both Transport Focus and Highways England, to ensure that the right balance is struck between less noticeable but gradually compounding marginal gains and the 'big ticket' items which often receive the most management attention.

But overall we find that Highways England has a good understanding of the key drivers of SRUS performance based on its analysis of early SRUS data, which has been complemented with insights from other data sources. There appears to be good alignment between Highways England and Transport Focus, the main difference being that Highways England has a slightly more comprehensive set of factors that it considers important, particularly around user *perception* of journey times.

A.4. USE OF OTHER SOURCES OF INSIGHT IN DEVELOPING THE CUSTOMER SERVICE PLAN

This section considers what other sources of customer insight (apart from SRUS) Highways England uses and how they are used to develop the Company's customer service plans.

A.4.1 Sources of insight

In addition to SRUS, there are broadly five main categories (or 'sources') of information. They are:

- Highview – Highways England's own customer experience tracking survey.
- Highways England's Customer Panel – an online customer engagement platform.
- Bespoke consumer, social and behavioural research – commissioned on specific issues.
- High-volume customer channels – e.g. Highways England website, customer contact centre, Traffic England service and social media.
- Direct engagement with customers and local communities.

We describe each of these sources and how they are used in the following sub-sections.

Highview

Highview is Highways England's own online road user opinion tracking survey which it has run since December 2017. It is larger than SRUS (approx. 1,750 responses per month / 22,000 per year) but the sample is not structured to be as representative of the user population (e.g. each region has an equal sample quota)³⁷ though it is considered to be comparable over time. It asks a mixture of closed and open questions to gather road user responses on their most recent journey in the last month and their: feelings of safety; overall journey experience; views on aspects of the highway environment; delays; understanding of smart motorways; and roadworks experience (where relevant). Recent Highview results and trends are covered in Part B.

As Highview is a similar type of source to SRUS, it has been used in similar ways, such as the key drivers analysis which is described in Section A.3 above. But, as Highview is more flexible, Highways England told us that it is able to conduct deep dive analysis in a way that is not facilitated by SRUS. Specific questions can be added to the survey to explore customer knowledge or understanding of particular issues. For example, Highways England has recently added questions to understand user awareness (and perception) of recent winter driving and breakdown communications campaigns which the Company then uses to assess whether it has been successful in reaching

³⁷ Email from Highways England dated 2 February 2021

the intended audience. Highview will also occasionally include “intentions”-style questions on future plans, such as intentions for travel over Christmas, to help with the planning of future work and operating resources.

Customer Panel

The Customer Panel is an online platform of 2,000 road users recruited by Ipsos MORI. Highways England uses it in a variety of ways to conduct qualitative and quantitative research. It can be used:

- for quantitative surveys of a broadly reflective sample of users;
- to obtain structured qualitative views on key topics;
- for user forums and focus groups to support concept testing;
- for deeper one-to-one interviews; and
- for implicit reaction time surveys to test unconscious perceptions or associations.

The Panel also helps Highways England to engage with hard to reach groups, for example users with disabilities and users from demographic backgrounds that are underrepresented in traditional survey methods.

The main piece of evidence Highways England provided to demonstrate its use of the Customer Service Panel was the Roadworks Implementation Toolkit (described in Section A.2.3). Highways England told us that the Panel was used to explore and test user preferences regarding roadworks signage, which formed the basis of the 20 customer principles for roadworks. Insights came from a range of projects which used the Panel. For example, Highways England found that customers liked information in advance of their journey when possible, so that they could plan accordingly, and that they are more likely to adhere to a restriction when this is accompanied by an explanation or reason. These insights can be seen in Principles 9 and 10 of the roadworks toolkit (see Appendix A).

Another example of Highways England’s use of the Customer Service Panel is given in Box 4 below.

Box 4: Space Invaders campaign

Highways England used the Customer Service Panel to inform its ‘Space Invaders’ campaign, which aimed to reduce ‘close following’. Following the car in front too closely was identified as a key contributory factor in road traffic collisions on the SRN and was one of the ‘behaviours of other drivers’ that concerned users of the SRN the most.

Highways England identified the physical and emotional impacts on different driver segments of this behaviour e.g. some felt intimidated whilst others felt angry. It identified that following too closely was a prevalent issue across the customer segments, and it was also able to identify the main offending segments and whether this action was intentional or not.

Based on these insights Highways England developed campaign materials with their creative agency, which were tested with the Customer Panel to ensure messages were clear and engaging.



Bespoke consumer, social and behavioural research

Highways England will occasionally commission ad-hoc bespoke consumer, social and behavioural research into specific issues. For example, recent commissions have explored the impacts of COVID-19 on travel patterns and wider consumption behaviours (e.g. impact on shopping trips and shift to online), and explored potential implications for Highways England and the SRN (see Box 5 on the following page). Other projects have focused on driver perceptions of safety, attitudes towards compliance and enforcement, and research into a “people-focused” approach to future SRN scenarios.

Every Customer has an Opinion (ECHO)

Every Customer Has an Opinion (ECHO) is a real-time feedback tool that Highways England started using in 2019. ECHO helps Highways England to learn more about how customers feel after they use one of the “high-volume customer touchpoints” (e.g. Highways England’s website, calls to customer contact centres and contact via other

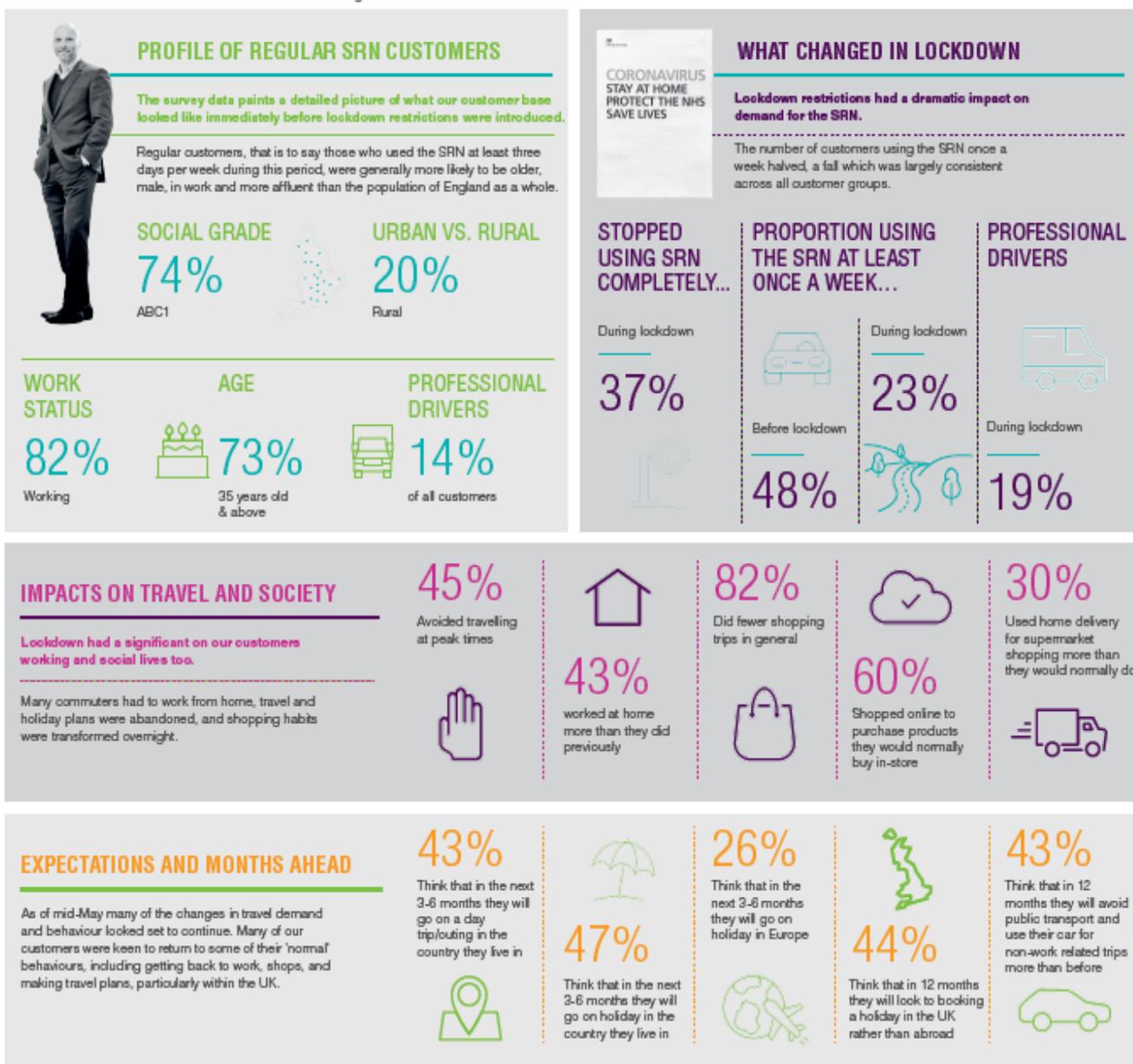
digital channels) or after they have received roadside assistance from traffic officers. It enables Highways England to gather post journey survey feedback, ask bespoke questions and to gather evidence to support specific service improvements. The tool uses multiple channels including sms messaging, mobile app, and the Company's website.

There are several examples of areas in which Highways England has used the ECHO tool and the actions they have taken as a result of the feedback. Customer views on the look, feel and content of its website informed various improvements such as the inclusion of defect reporting with 'Fix my Street' and operational improvements to the 'planned roadworks spreadsheet'. Highways England also used sms messages to ask customers about their experience of hard shoulder break downs attended by Traffic Officers / handled by a Regional Operations Centre. As a result of the feedback, Highways England told us that it now: proactively contacts customers who highlighted concerns in their feedback to prevent escalation to a complaint; have been able to decrease regional differences in performance; and are able to more promptly identify and respond to issues such as litter and road defects.

Box 5: Example of bespoke user research in to Covid-19 impacts on travel behaviour

HOW THE COVID19 LOCKDOWN IMPACTED ON OUR CUSTOMERS

We will see which behaviours have held and which have changed in the next Travel Tracker.



The first online survey comprised 4,059 UK adults aged 16-75 years old, with sampling structured to secure at least 2,000 completed surveys in England, 1,000 in Scotland, 650 in Wales and 200 in Northern Ireland, and data weighted to known population profiles within each nation. Fieldwork was undertaken between 15-22 May 2020 in England. Participants were sourced from the Ipsos Online Access Panel. This infographic includes data based on participants in England only, with responses based on all customers of motorways or major A roads before or during the 'lockdown' period between 1 January and 10 May 2020, unless otherwise stated. Where figures do not add up to 100%, this is the result of computer rounding or multiple response options.

Source: Ipsos MORI (2020) "Highways England Covid-19 Research Digest – 2nd Edition"

Direct Engagement

Highways England can also gather intelligence and develop insight by directly engaging with Transport Focus (as an independent representative of road users interests), major customers groups (e.g. transportation, logistics and freight companies) and local communities affected by major road schemes.

We heard several examples of this in practice. For example, as part of one of the M1 smart motorway schemes (see Box 1), the project team (led by Costain) were required to engage with key customers as well as local stakeholders and representatives of communities that were affected by the scheme. Key customers, such as Royal Mail, Amazon, and other large logistics firms, were provided with a weekly traffic management update and were notified of road closures in advance. This led to some changes to key dates and diversion routes at the customer's request. Relationships with local stakeholders and community representatives were developed which meant that issues and concerns could be identified and responded to, e.g. providing enforcement vehicles to monitor local community concerns about speeding vehicles along diversion routes.

A.4.2 Use of insight in the development of customer service plans

As noted above, Highways England publishes an annual Customer Service Plan which outlines its commitments to improving customer service.³⁸ When asked how the actions set out in the Customer Service Plan were identified, Highways England told us that insights from the various sources described above are utilised in a process led by the Customer Experience Division. Several other factors are considered, including KPI performance and the overarching corporate strategy. The approach is agreed at the Executive Customer Service Group (ECSG) and then development is led by the customer service teams, who liaise across the business and return the plans to the ECSG to review periodically. Highways England told us that Transport Focus is regularly engaged in detailed discussion during the process; that increasingly the Company is becoming more aligned with Transport Focus on key priorities; and that there is generally agreement on the “next thing to focus on”.

Highways England told us that the key areas of focus for the 2020-21 customer service plan were principally derived from the results of the key driver analysis (based on SRUS and Highview), i.e. improving journey times, the impact of roadworks on journey times, and information provision. We were also told that the plans were developed with an emphasis on consideration of a broad range of customers and with the aim of developing a customer focussed culture within Highways England.

As we have noted above, we find that there is a large and diverse range of actions set out in the plan (17 main actions and 5 ‘enabling activities’). Several of the actions have clear and logical links back to SRUS, and Highways England appears to have a plan for measuring success and learning what works and what does not. For example, the aim of reducing journey times and improving experiences by using 60mph speed limits can be traced back to the key drivers analysis and the Customer Panel, and the Company has developed a clear target of 75% across all major motorway projects by 2022.

For other actions, Highways England has provided us with an overarching explanation of the process it undertook to develop the customer service plan. The Company noted, for example, that the plan is an intentional response to a broad range of insights and not just SRUS. But it was unable to clearly articulate what insight originally led to the identification of that action, what activities Highways England plans to deliver that action, what its milestones or deadlines are for achieving that action and, in some cases, how it intends to “close the feedback loop” to determine which actions worked and which did not.

For example, although it is understandable that an action is included to deliver “smoother journeys on improved road surfaces”, we have not seen evidence which demonstrates how Highways England plans to use customer insight to decide which issues are most important to customers and how it should target maintenance work. Additionally, whilst we have been told in general terms that Highways England will use a number of measures to measure success, such as the impact on its KPIs and Performance Indicators, for some actions it is less clear whether Highways England has a detailed plan for learning what works well and what does not.

³⁸ Highways England (2020) “Connecting our customers: 2020-21” available [online](#).

Overall, we find that Highways England makes use of a variety of sources of customer data to help improve its customer service performance and to embed customer insight into business decision-making more generally. It is clear that for a number of actions in their customer service plans Highways England has: listened to and developed an understanding of user needs and priorities, are taking actions to reduce the impact that they have on customers, and has (or are in the process of developing) specific measures by which to measure success.

However, an area for improvement that we have noted above about the current customer service plan is that it is not completely clear to us how Highways England has sought to prioritise or focus the actions, or how it will measure the success of each individual action in order to learn what works and what doesn't. Some of the actions are (potentially deliberately) not specific, measurable or time-limited.

PART A: CONCLUSIONS AND RECOMMENDATIONS

During our review we interviewed a senior representative of Transport Focus, the independent watchdog for transport users, to understand from their perspective whether the key customer service issues are being adequately addressed by Highways England.

Transport Focus' perspective on the customer service strategy

Our discussion with Transport Focus covered several related topics, including the current status of the SRUS survey, its plans to restart SRUS using an online survey method, its views on Highways England's overall approach to improving the road user experience, and areas where Transport Focus felt that Highways England could improve going forward.

On the impact of the Covid-19 pandemic and the suspension of the SRUS at that time, Transport Focus' view was that the key drivers of customer satisfaction remained unchanged so Highways England's customer service plans should be largely unaffected. This view was also reflected in our discussion with Highways England's customer service directors, who confirmed that the organisation's customer service priorities remained the same, despite the wider disruption to working arrangements and SRN usage during 2020.

Transport Focus was overall positive in its view of the customer service strategy. However, it believes there are both areas of strength, and also areas for improvement. It considers that Highways England is demonstrating areas of clarity in addressing some of the key messages contained in SRUS, for example more accurate and timely roadworks information, where Highways England's willingness to improve has generated real progress. But it also considers that this example of "buy in" could be extended by Highways England to deliver what it described as marginal gains in other areas. The broad areas where it would like to see further progress include:

1. Building on the success of initiatives such as improving roadworks information, by using the opportunity for marginal gains in other areas that customers value / have expectations:

- Transport Focus believe there is scope to do more incrementally on issues like poor signage. On this issue, we note that Highways England is engaging with Transport Focus on its "Sort My Sign" campaign and is responding to several submitted reports as well as implementing its internal "Fix Now" initiative.³⁹
- On defects management, Transport Focus noted that there was a view that issues could be fixed and 50mph speed limits removed more promptly.
- It would like Highways England to get to a point where every region has a "Top 10" set of tangible investigations or actions based on customer feedback in the region, particularly on delay-related issues, where the action did not necessarily involve the need for large scheme solutions. Whilst we note that each region has a customer service improvement plan, we think Transport Focus is more concerned with initiatives to tackle recurrent delay "hotspots" and known issues, such as signage, surface defects, etc.

³⁹ Transport Focus (2020) "Sorting your signs: if it's not clear, it's not safe" available [online](#)

- Transport Focus' view is that there are realistic actions which have a tangible impact on customer experience in the near term, but it would like to see Highways England act on the Company's own good ideas that address customer needs and drive them through with more urgency.

2. Driving the agenda for RIS3:

- Transport Focus argued that Highways England has the best information about the network and should use that to shape the RIS agenda with DfT. In particular, it suggested that Highways England should use this information to drive a debate on the relative benefits of new large schemes versus investing in maintenance and renewal of the existing network.

Our conclusions and recommendations

As an organisation, we find that Highways England takes pride in customer service, which has been reflected in all our interviews with internal staff to date. This is particularly the case where the Company comes into direct or frequent contact with customers, e.g. major freight and logistics firms, representatives of local communities affected by roadworks and/or diversion routes, and road users who experience an incident or breakdown.

Although it is often the supply chain which is at the interface between customers and the network, the customer service culture appears to be driven and encouraged from within Highways England itself, in part because of the reputational impact that poor customer service might have. Whilst there is undoubtedly some external pressure from local community representatives, major road users and other interested stakeholders (including Transport Focus) on particular customer service issues, these relationships appear to work relatively well and contribute to Highways England's own standards.

The transition in KPI from NRUSS to SRUS has been interrupted, but Highways England has in place most of the evidence gathering and reporting processes that should provide a timely view of performance once surveying restarts. Whilst there may be an initial effort required to encourage interest in SRUS within the business and in the supply chain, Highways England has already done a lot of groundwork in terms of embedding customer service more generally into the business.

Highways England has developed a good understanding of the key drivers of SRUS performance based on analysis of early SRUS data. There appears to be good alignment between Highways England and Transport Focus on the key drivers. And we tend to agree with Transport Focus' view that the key messages are little changed between NRUSS and SRUS, so as it stands there are no expected changes in the key customer service themes that Highways England needs to address.

More broadly, Highways England makes use of a variety of sources of customer data to help improve its customer service performance but also to embed customer insight into business decision-making more generally. A good example of this is roadworks, where the Company has listened to and developed an understanding of user needs and priorities, is taking several actions to reduce the impact that they have on customers and to help them plan their journeys, and has (or is in the process of developing) specific measures by which to measure success (e.g. advanced accuracy of roadworks information; delay in roadworks).

If we have identified an area of potential improvement with regards to the current customer service plan, it would be that it lacks "direct line of sight" – i.e. it is not completely clear to us that the plan in the round has a strong link back to SRUS, or that Highways England has sought to prioritise or focus the actions included according to its customer satisfaction KPI. In some cases, it is unclear how the Company will measure the success of each individual action in order to learn what works and what does not. Although we recognise that the customer service plan is a high-level public-facing document, it is evident that some of the actions are not specific, measurable or time-limited. Despite our efforts to uncover more detail from the Company through our requests for further information, it was unable to provide the evidence that we sought.

Final Recommendations

Whilst Highways England is in a relatively good place overall with regards to SRUS and customer satisfaction, we have several recommendations which ORR should consider taking forward over the next 12 months:

- **SRUS processes.** Once the survey has been relaunched and is generating closer to 750 responses per month, ORR should continue to monitor how Highways England is improving its use of SRUS to measure and demonstrate the effectiveness of the actions it takes to improve customer service on the network.
- **Embedding SRUS through the sharing of best practice across the regions.** In the context of understanding regional differences in SRUS performance, ORR should follow up on this study to obtain more detailed examples to demonstrate how Highways England is disseminating customer satisfaction learning and best practice between its regions.
- **Line of sight.** ORR should satisfy itself that Highways England followed a clear and logical process to develop its Customer Service Plan, including that, in the round, there are clear links back to SRUS, and should review how the Company has performed against those commitments.
- **Finding the right balance.** We recommend that ORR continues to engage with both Transport Focus and Highways England, to ensure that the right balance is struck between less noticeable but gradually compounding marginal gains and the ‘big ticket’ items which often receive the most management attention.

Additionally, we make the following further recommendations which ORR should consider taking forward ahead of RIS3:

Monitoring the links between recurrent delay and SRUS

Highways England displays a clear ambition to reduce customer impacts of e.g. roadworks, where it is in more direct control. Whilst there is good evidence to show that delays caused by roadworks and incidents are a source of significant frustration for road users (and tend to increase as user perception of delay also increases), they make up a relatively small portion of delay overall (c11%).⁴⁰

Given that ‘satisfaction with journey time’, ‘traffic level’ and ‘actual vs expected journey time’ are the most important drivers of overall satisfaction, we recommend that ORR should satisfy itself that Highways England is exploring ahead of RIS3 whether there are affordable options which help (at least at the margins) to reduce the impact of recurrent delay, which is by far the largest component of delay.

The difficulty and potential cost of reducing recurrent delay should not be underestimated. Highways England already has a very significant RP1/RP2 investment programme to deliver. However, there may be some actions it can take which help at the margins to improve journey times and customers’ perceptions of journey times even during peak times. We understand that ORR’s recent deep dive into congestion and delay considered this issue in detail and recommended that Highways England should continue to develop its understanding of congestion and the effectiveness of its levers over delay, including the use of interventions such as Travel Demand Management.

Monitoring the links between provision of information and SRUS

The delivery of the RIS2 investment programme, alongside the continuing need for maintenance and renewals activity, also creates challenges and risks for Highways England in terms of managing the impact of road space planning and diversion routes on customer satisfaction. Highways England did well in terms of maintaining customer satisfaction scores through an increasing programme of work during RP1, but RIS2 is a significantly larger overall programme of work.

To address this risk, Highways England is working more closely with major transport customers and third parties to provide better information on closures and incidents both ahead of and in real time, but for non-professional road users the Traffic England service is not an intuitive or easily understood whole journey planner.⁴¹ We understand that Highways England’s current approach is to focus on making information available to others rather than developing its own journey planning tool, which is counter to the approach taken elsewhere e.g. the TfL Go or National Rail Enquiries apps. Given that users have growing expectations of the quality of journey planning information, we recommend that ORR should engage with Transport Focus, Highways England and other relevant

⁴⁰ Analysis presented in Highways England’s draft Strategic Business Plan

⁴¹ IBI Group (March 2019) “Highways England’s provision of information to road users” available [online](#)

stakeholder groups to understand whether there is more that could be done to help road users plan their journeys in advance to avoid unnecessary delays and improve customer satisfaction.

Although our recommendations are principally for ORR, we also make the following recommendation for Highways England to take forward:

Driving the agenda for RIS3. Highways England has the best information about the network and should use that to shape the RIS agenda with DfT. Specifically, we recommend that Highways England should consider how best to use this information to drive a debate on customer satisfaction and the relative benefits of new large schemes versus investing in maintenance and renewal of the existing network.

PART B: ORR MONITORING OF ROAD USER SATISFACTION

In Part B of this report we provide our analysis and recommendations in respect of the last three scope questions set by ORR, which cover the following issues in relation to ORR's ongoing monitoring of road user satisfaction:

- Section B.1 considers, in the absence of SRUS or with only partial data, what other data sources ORR could use and how would they be used to monitor satisfaction in 2020-21 and 2021-22.
- Section B.2 considers the potential impacts of using an online survey rather than a face-to-face method in the context of achieving the existing targets.
- Section B.3 considers the main factors relevant to setting the road user satisfaction targets post 2021-22.

Lastly, we summarise our recommendations in relation to the issues raised in Part B.

B.1. MONITORING ROAD USER SATISFACTION IN THE ABSENCE OF SRUS

SRUS has been suspended since March 2020 and early results from the online survey will emerge in the coming months.⁴² SRUS should return as a fully functioning performance metric at some point in the 2021-22 reporting year, but Transport Focus is still in the early stages of restarting it through the 'push to web' method and the exact timeframe for results will depend on the developing response rates and any improvements required to ensure that the sample structure is sufficiently robust to allow for publication. There were no concerns raised about these issues during our review, but it would seem appropriate for ORR to keep abreast of methodological developments so that it has a good understanding of the potential impacts of any new changes when the survey restarts.

Therefore, it seems likely that there will be limited data on which Highways England's performance against the Road User Satisfaction KPI can be monitored, for an extended period of time – certainly for the current reporting year (2020-21) and potentially with implications for 2021-22. To further complicate the issue, traffic volumes remain well below "normal" levels (a trend which may persist on-and-off into 2021-22) which is likely to have some positive impacts on the experience (i.e. satisfaction) of road users as they use the network. This creates an additional challenge for ORR as it assesses Highways England's actual road user satisfaction performance over the past year.

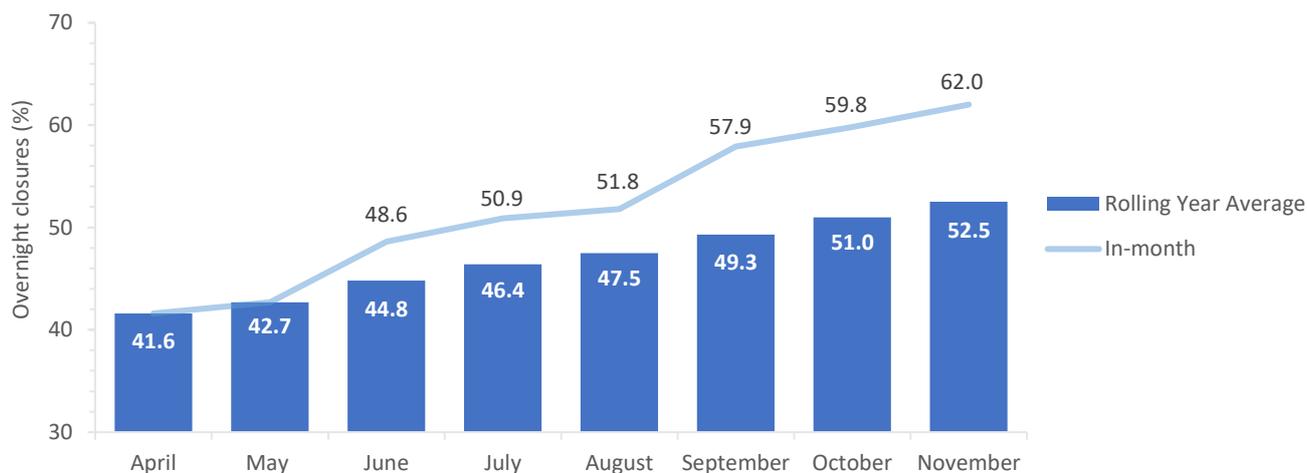
In the absence of SRUS, or with only partial data, we suggest that it would be appropriate for ORR to consider placing weight on multiple sources of evidence, rather than relying on any one source to assess Highways England's performance. Potential alternative sources that ORR might consider include:

- **Highview.** Although Highways England told us that the survey was not designed for use as a performance metric, it nonetheless provides useful data on experiences across a range of important themes that survive the transition between NRUSS and SRUS. The sample structure has features which seek to broadly reflect the SRN user base (e.g. there are quotas to ensure that business, commuter and leisure drivers are all represented), it allows for regional comparison, and the structure is consistent across waves meaning that it can be used for trend analysis. In the following sub-section, we explore how Highview has tracked SRUS in the past and whether ORR might consider developing some caveated analysis to suggest at least qualitatively how SRUS might have performed in 2020/21 had it not been suspended. Another benefit of Highview is that it might be possible to adjust the results for the impact of Covid-19, as discussed below.
- **Other "user satisfaction" performance metrics.** On a temporary basis, ORR could place greater weight on the other satisfaction-related measures, e.g. the roadworks accuracy KPI, on trends in the other PIs, and HE's delivery of the Performance Specification "commitments". But, whilst there are good reasons to believe that these related measures / activities might contribute positively to SRUS, they are not good proxies for road user satisfaction. Furthermore, there does not appear to be much reporting data available for ORR to use – Highways England's recent performance on these metrics is shown in Box 6 below.

⁴² Transport Focus told us that it would make emerging responses available to Highways England as a source of intelligence about customer experiences and potential analysis, but that it could not put a date on restarting publication of results.

Box 6: Highways England's performance against other KPIs and Pis

KPI 5.2: Percentage of overnight road closures that are correctly notified (Target 90% by 2025)



Timeliness of information provided to road users through electronic signage: Not reported.

Ride quality (subset of the pavement condition metric which captures surface quality): Not reported.

Working with local highways authorities to review diversion routes for unplanned events: Not reported, but Highways England told us that it was on track to review 20% of routes during the first year of RP2.

Source: CEPA analysis of Highways England's Performance Summary Report – November 2020

- Highways England's delivery of the customer service plan.** The Plan sets out actions which are intended to improve user satisfaction as measured by SRUS (and to deliver improved customer service in the round), although we have not seen any evidence which tries to estimate or quantify the potential impacts on SRUS.

By the end of the year Highways England expects to have delivered progress on several actions – including developing 30 new variable message sign (VMS) legends, and improving the overall percentage of its major motorway projects using 60mph speed limits.⁴³ As at November 2020, Highways England has 58% of major schemes on motorways operating at 60mph and the percentage of major schemes in development, proposing a highest speed limit of 60mph or above is at 66%, which is below its ambition of 75% by 2020.⁴⁴ We understand that it has made good progress on the accuracy of roadworks information, and on reviewing diversion routes, but the Company's progress against the other actions contained in the plan is less clear.

The drawback with this as a monitoring approach is that it assesses inputs rather than outcomes. ORR is not best placed to assess whether they were the right inputs, which is a decision for Highways England. If Highways England can demonstrate to ORR's satisfaction that by delivering on the customer service plan it should support improvements in road user satisfaction, then it would not be unreasonable for ORR to put some weight on its assessment of how much progress Highways England has made against the planned activities and milestones set out in the plan. But, as we have highlighted in Part A, the challenge for ORR is to satisfy itself that Highways England followed a clear and logical process to decide on the actions included in its Customer Service Plan and to assess how the Company performed against those commitments.

⁴³ ORR deep dive.pptx

⁴⁴ Highways England's Performance Summary Report – November 2020

- **Customer Audit Reports of roadwork schemes.** Highways England’s monthly customer audit reporting pack is by no means representative of the whole network, but provides some useful evidence on the management of roadworks and their recent impact on the customer experience.

Because most journeys do not encounter roadworks, and where users do encounter them they are only one aspect of the customer experience, it would only be appropriate for ORR to place a relatively low weight on this source of evidence. Overall, we do not consider this to be a strong option for monitoring customer satisfaction in the absence of SRUS. At best, it might help ORR identify improving trends or, conversely, emerging concerns about an important aspect of the service delivered by Highways England and where the quality of delivery is within its control. Nonetheless, ORR could use this evidence on an ongoing basis to challenge the Company on actions it is taking to improve its management of roadworks.

Although each of these options has advantages and drawbacks, some combination of Highview, the Company’s performance as measured by the other “meeting the needs of all users” KPIs and Performance Indicators, its progress against its Performance Specification commitments, and progress against the actions set out in the Customer Service Plan, would seem appropriate.

We recommend that ORR considers the available sources further but, at this stage, we would recommend placing the most weight on Highview (explored further below) – consistent with the principle that performance metrics should measure *outcomes* where possible. ORR will need to consider further how to combine this with the other sources considered as part of its assessment, as precise quantitative weightings are unlikely to be meaningful in this context.

Potential role for Highview in monitoring customer service performance

Because Highview, like SRUS, is a customer experience tracking survey, ORR wanted to understand whether and how it could fill the void left by SRUS in the near term. Like SRUS, the survey is a mixture of closed (i.e. multiple choice) and open (i.e. free text) responses, so it allows for quantitative measurement of the user experience alongside more qualitative analysis of the root cause of (dis)satisfaction. Like SRUS, Highview only asks for the opinions of users related to their most recent journey on the SRN in the last month and could (with appropriate caveats) be used for analysis at the level of an individual road.⁴⁵

Although they are conceptually similar, there are some important differences in the Highview survey questions and design which should be considered:

- High View question asks user about *overall journey* rather than satisfaction with a particular road (as in SRUS).⁴⁶
- Whilst the sample structure is designed to be balanced across age, gender, region and purpose of journey (i.e. there are respondent “quotas”), responses are not weighted by usage in the same way as SRUS.
- Although it will support trend analysis, Highways England told us that there is the possibility of methodological changes over time (i.e. it does not have the same “change control” processes as SRUS). An example of this is the quotas for journey purpose (20% of the sample each month were commuters and 20% driving for business) being turned off in April 2020, which may have an impact on the results.

As a result, Highways England highlighted to us (and to ORR) that Highview was never intended to be a substitute/proxy for, or comparable with, SRUS – although it did provide evidence to demonstrate that it had considered the possibility.⁴⁷

Having considered the issues independently, we agree that there are some important differences between SRUS and Highview that would make Highview less suitable as a performance metric compared to SRUS. But, contrary to

⁴⁵ Highview – A30 Extract – August to October – Final.pptx

⁴⁶ Board Session – Customer satisfaction KPI deep dive – Jan21.pptx

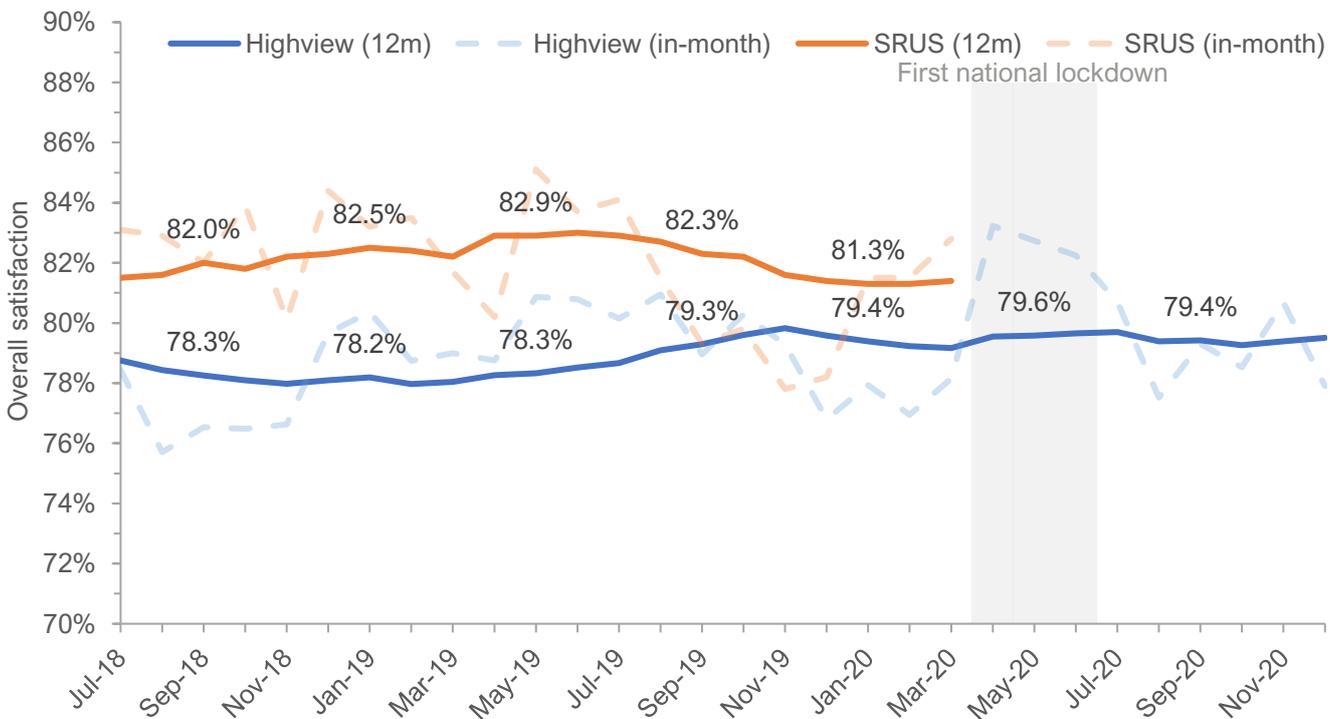
⁴⁷ Board Session – Customer satisfaction KPI deep dive – Jan21.pptx

Highways England, we consider that Highview could reasonably be used by ORR in the absence of SRUS as part of its assessment of the Company’s performance for 2020-21 and its early monitoring of trends in 2021-22. We reach this view because:

- There appears to be a relatively stable difference between the *overall satisfaction* score in SRUS and the *overall experience* score in Highview, that is unlikely to change significantly over the short term.
- They both ensure good coverage and representation of a range of user types and allow for comparisons to be made across regions.
- In the absence of SRUS, there is a need to be pragmatic about the other quantitative data options which are available.

The stability of the difference between SRUS and Highview is shown in Fig 6 below. Although the difference has narrowed over time, from around 4.5 percentage points in April 2019 to 2 percentage points in January 2020, this is not unexpected given methodological and design differences between the two surveys. Using the 12-month rolling overall experience score as the headline indicator, we estimate that the likely difference between Highview and SRUS over the course of 2020 is between 2.0–3.5 percentage points.

Fig 6: Comparison of overall satisfaction and overall experience scores from SRUS and Highview



Source: CEPA analysis of Highways England and Transport Focus data

If the arguments described above are accepted on the basis of developing a caveated illustration of current trends then, given that the latest overall Highview experience score was 79.5% for December 2020, it would imply that SRUS would have been tracking at between 81.5%–83% at that time, roughly in line with the Company’s 2020-21 target of 82%.

Before it decides what weight (if any) it gives to this evidence in its annual assessment of Highways England’s performance, we recommend that ORR considers whether there would be value in any further, more detailed analysis of the differences between SRUS and Highview. For example, it may be worth exploring trends in the underlying sample and identifying the scale of those differences with SRUS (e.g. comparing the relative shares of commuter / business / leisure journeys; and differences in response numbers across regions), which will allow ORR to present a caveated but pragmatic analysis of customer satisfaction in its annual assessment.

Box 7: Headline results from the Highview survey (October 2019 to October 2020)

Fig 7: How would you rate your overall experience travelling on Highways England roads?

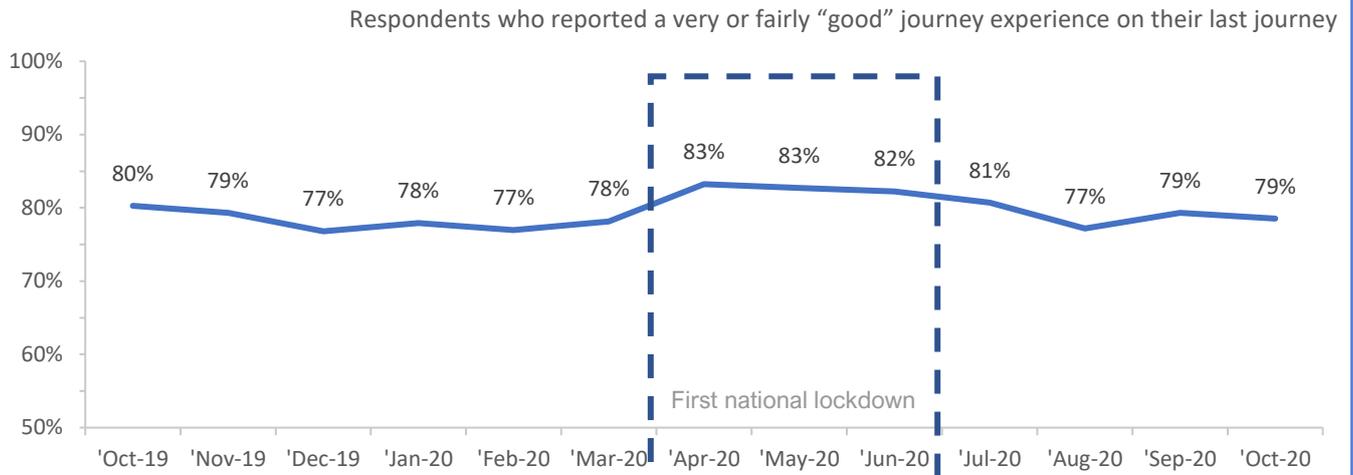


Fig 8: Overall, how safe did you feel during your journey?

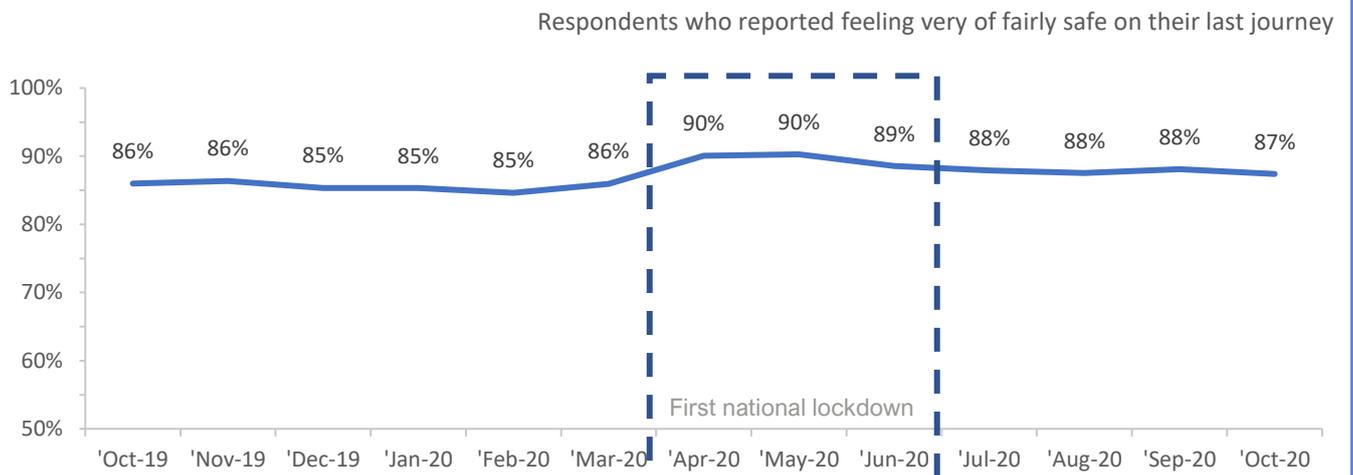
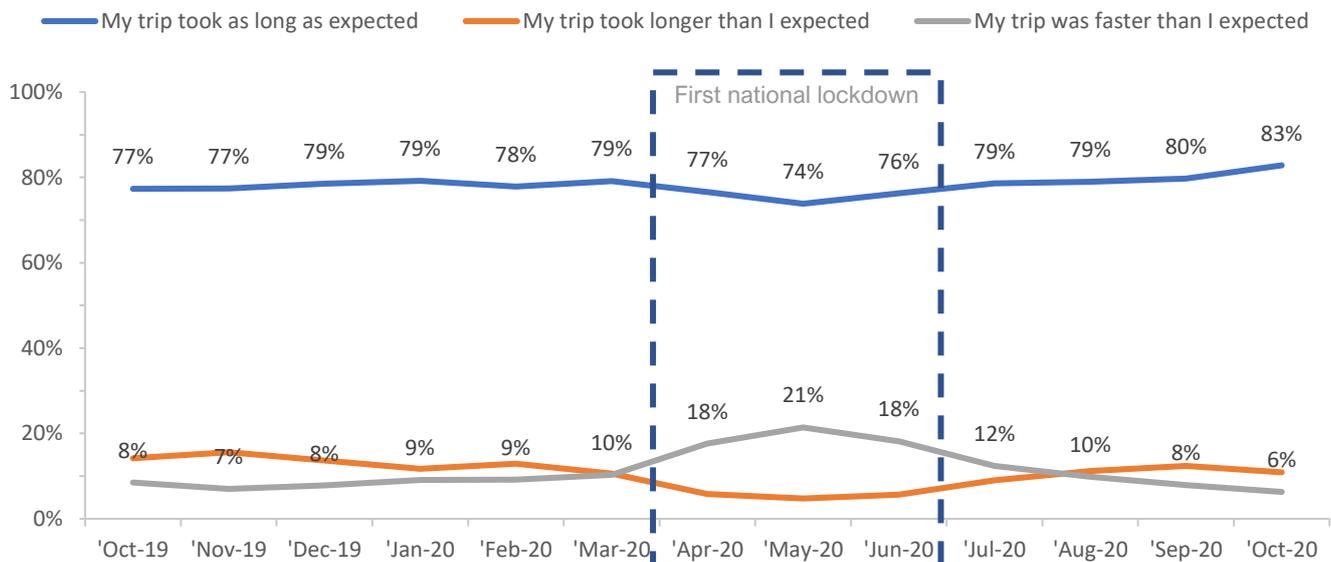


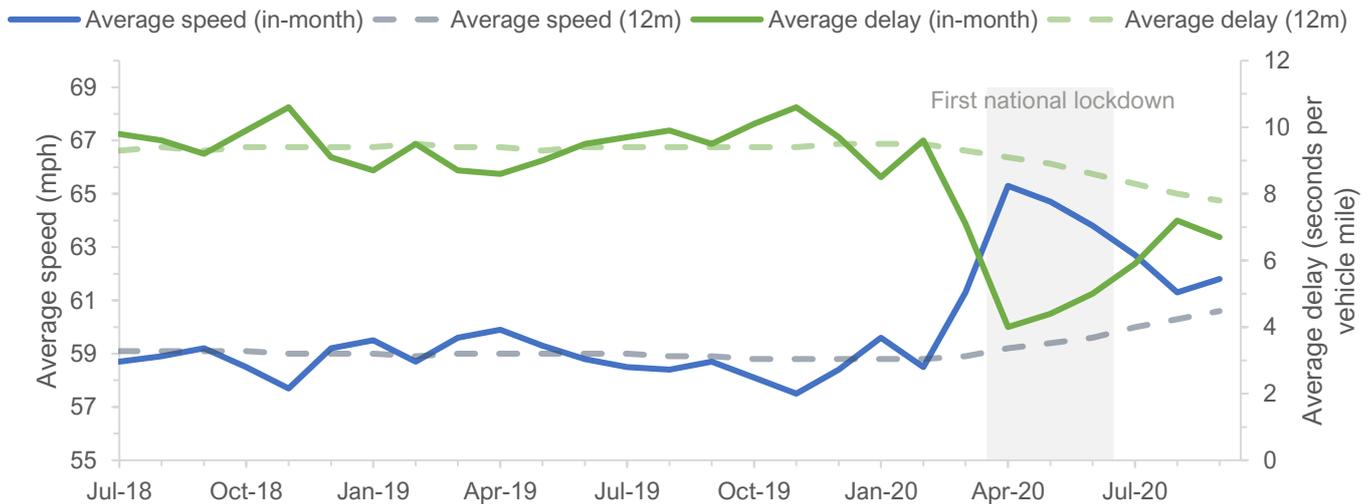
Fig 9: Which of the following best describes the time it took to make your last trip?



Source: Highways England's Highview survey

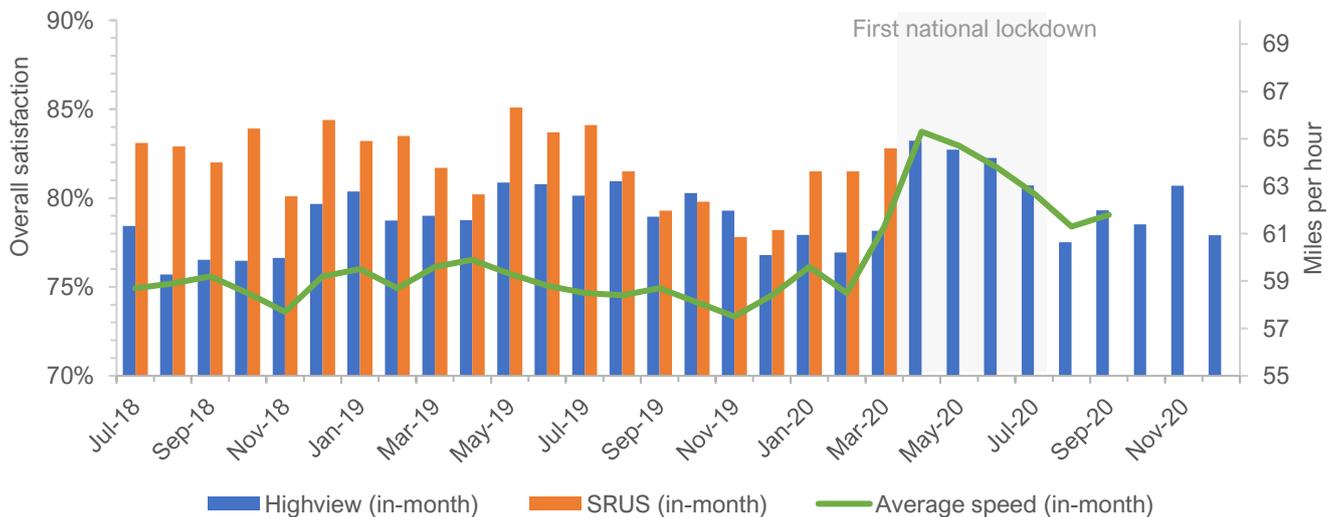
Additionally, as part of its assessment ORR should consider how it might factor in the change in traffic flows as a result of Covid-19 lockdown measures. Fig 10 shows that as restrictions were introduced, average speed and average delay recorded on the network improved. When lockdown restrictions were relaxed, those improvements in average speed and average delay were partly offset again. Evidence from the Highview survey suggests that the overall in-month experience score improved by around 4–5 percentage points as lockdown measures were introduced and average speeds improved, but that this effect declined as traffic volumes began to recover (see Fig 11).

Fig 10: Changes in average speed and average delay (July 2018 to September 2020)



Source: CEPA analysis of DfT data

Fig 11: Changes in average speed and overall in-month satisfaction scores (July 2018 to September 2020)



Source: CEPA analysis of Highways England, Transport Focus and DfT data

To test whether we could suggest a pragmatic adjustment for ORR to consider, we conducted some straightforward regression analysis to test for correlation between average speed (monthly) and overall Highview experience (monthly) over the period July 2018 to September 2020. Our tests found a relatively weak relationship, suggesting that over the data period average speed explained only a third of the variance in the monthly Highview satisfaction score. This is not unexpected. Although previous analysis of SRUS has shown that *satisfaction with journey times* and *traffic level* are key drivers of *overall satisfaction*, we note that:

- there are other factors that can influence satisfaction over the short term, particularly if, over time, user expectations adjust to an average journey time;
- there is sample-driven variation in monthly Highview scores; and
- there are several important differences between Highview and SRUS.

It is likely that some combination of these factors accounts for the weak correlation that we found between changes in average speed and changes in overall satisfaction. However, if we assume that average speeds on the SRN had continued at around 59mph (roughly as they were before Covid-19), our analysis suggests that an adjusted overall Highview satisfaction score for the year would be around 78.7%, or 0.7 percentage points lower than the 12-month rolling average reported in December 2020.

The challenges we encountered in our analysis does not mean that it would be inappropriate for ORR to apply some negative adjustment to Highview to account for the likely impact of lower than usual traffic levels. Rather, we recommend that it should be pragmatic about the robustness of any more detailed quantitative analysis that could be done to support such an adjustment. But a downwards adjustment of around 0.5 percentage points to Highview might be a proportionate and pragmatic solution.

B.2. IMPACT OF ONLINE SURVEY METHOD ON SRUS PERFORMANCE

This section considers the potential impacts of permanently moving the SRUS survey online, to initially replace but eventually to supplement the face-to-face method, in the context of Highways England’s existing targets – i.e. to achieve overall SRUS satisfaction of 82% in 2020-21 and 2021-22.⁴⁸

Much of the literature which compares online versus telephone and face-to-face survey methods are concerned with sample differences and how representative the sampling is of the target population. In general, online respondents are more likely to be younger, male, more educated and have higher incomes compared to the respondents to telephone and face-to-face methods.⁴⁹ If not designed correctly, this can introduce sample bias into the survey.

But we understand from discussions with ORR that Transport Focus has found the opposite to be true during the early testing of the online SRUS survey method – i.e. that it was getting a higher response rate from an older population and was finding it more challenging to recruit responses from younger age groups.⁵⁰ This shows that the differences between online and face-to-face survey methods on the sample can be difficult to predict in advance.

There are also some findings in the survey literature which indicate that the survey method can influence the responses given – particularly when the questions are trying to elicit information which might be considered sensitive or counter to social values/norms. For example, Gallup note that:

“Because of these [survey administration] differences, when respondents answer questions that an interviewer reads aloud to them, research has consistently shown that respondents tend to give more extreme, positive responses to attitudinal items and more socially desirable responses than when the same questions are administered to the same population via web or mail.”⁵¹

The general conclusion is that the methodological effects could vary by study, depending on the issue, sampling approach and question design. We are not aware of any studies which have reviewed the evidence of the impact on

⁴⁸ DfT (March 2020) “Road Investment Strategy 2: 2020-25” available [online](#)

⁴⁹ For example, see Duffy and Smith (2005) “Comparing data from online and face-to-face surveys” International Journal of Market Research; or Beck, Yan and Wang (2009) “A comparison of web-based and telephone surveys for assessing traffic safety concerns, beliefs and behaviours” journal of Safety Research.

⁵⁰ 20210224 SRUS restart pilots summary- CEPA.pdf

⁵¹ Gallup (April 2018) “Why phone and web survey results aren’t the same” available [online](#).

customer satisfaction surveys such as the SRUS, although Ofwat had to consider similar issues with regards to the design of the new Customer Measure of Experience (C-Mex) metric introduced at PR19 (see Box 8).

Box 8: Case study on Ofwat’s customer measure of experience (C-Mex)

As part of PR19 Ofwat introduced C-Mex which applies to the 17 largest water companies in England and Wales for the 2020-25 period. It is a financial and reputational incentive designed to provide residential customers with excellent levels of service. It replaces the service incentive mechanism (SIM) which had been in place since 2010. It is a survey-based mechanism, measuring direct customer feedback. Every year, Ofwat will publish an annual league table showing each company’s score, and each company can receive an outperformance payment or incur underperformance penalties based on its score relative to other companies.

Ofwat uses a mixed methodology approach – telephone interviews and online surveys, depending on the customer. During the C-Mex pilot, online survey response rates were low (3-4%) which meant that a large number of survey invitations had to be emailed out to achieve a robust number of responses, although the online survey is relatively low cost to administer. As such, each company’s score is made up of 150 telephone interviews and 50 online surveys (minimum 200 interviews) per quarter.

During the pilot study, Ofwat also found that the online surveys were less positive than the results from phone interviews. The rationale given was that online response rates were substantially lower than for telephone surveys. This can give rise to sampling bias since customers with strong negative feelings are more likely to respond than those who are ambivalent. It was suggested that the online survey may be less representative of the population than the telephone survey. Based on some comparative analysis between online and telephone results carried out by Ofwat and one of the water companies, Ofwat decided to apply an upward correction factor of 5% to the online results.⁵²

Source: CEPA analysis of Ofwat documents

The conclusions that we find in the literature are supported by the views of Transport Focus, which recognised that there was a general tendency for online surveys to elicit “more negative” views, but felt that it was too early to quantify what the impact of that might be on SRUS, particularly since the long-term mix of online versus face-to-face interviews has yet to be established. The early pilot results that we have seen suggest that there is potentially a significant (currently 10 percentage point) difference between the face-to-face and push to web results, driven mainly by an increase in ‘neither/nor’ responses rather than an increase in dissatisfaction. It should be noted that Transport Focus will continue to improve conversion from survey invites to questionnaires, and that this is important in developing an understanding of what a stable difference between the two methods might be.

Transport Focus also highlighted other factors which might influence SRUS scores, including changes in the SRN user population structure, traffic flows post-Covid 19, and other social factors. When we asked whether Transport Focus would consider it appropriate to adjust the SRUS score for any such “online effect” (to offset any impact that added to the challenge of meeting the existing SRUS targets), Transport Focus felt that a more pragmatic ‘baselining’ approach was needed once a larger and more statistically robust volume of SRUS responses are available for analysis.

We agree with this as an appropriate and pragmatic suggestion. Whilst there will almost certainly need to be changes to the quotas and weightings used in SRUS to ensure that the survey remains representative of the wider user population, concerns about the underlying sample might be overplayed if:

- Transport Focus can adjust quotas and improve response rates across demographic groups over time; and
- over the longer term, the SRN user profile remains relatively broad.

There is some early evidence from Highview to suggest that the SRN user population became younger and slightly more male on average during the first national lockdown⁵³, but this effect is likely to have been partly offset since as there is evidence that people of all age groups are travelling more than they were from April–June 2020. In the short term there are likely to be several Covid-19 related impacts on travel patterns (e.g. local and regional lockdowns; travel restrictions and roll-out of the vaccination programme starting with older and more vulnerable

⁵² Ofwat (March 2019) “PR19 Customer Measure of Experience: Policy decisions for the shadow year 2019-20” available [online](#).

⁵³ Ipsos MORI (2020) “Highways England Covid-19 Research Digest – 2nd Edition”

population groups) but over RP2 these impacts will gradually unwind. The long term impacts of home working, for example, are uncertain given that the ability to work from home differs by profession and is likely to vary by region. Given the continued increase in online shopping, one trend that is likely to become more permanent is a significant increase in commercial vehicle mileage as a proportion of total SRN mileage.⁵⁴

SRUS will need to be 're-baselined' as a result of changes both to the survey method (online) and permanent changes in SRN usage due to Covid-19, and this should inform discussions about Highways England's future SRUS targets. Any such adjustments should be evidence-based but ORR should be skeptical of the argument that re-baselining is only possible after 6-12 months. We recommend that it continues to monitor developments as early results come in, because these impacts are difficult to predict in advance. We suggest that ORR engages with both Highways England and DfT to access any further research they have commissioned into travel and usage of the SRN in 2020 and into 2021.

Once Transport Focus is confident that the survey is stable, and there are at least six consecutive months where the sample is closer to its pre-Covid size (~750 per month), ORR should restart monitoring via SRUS, potentially alongside a more detailed review of the evidence after a full year of operation. Based on the response rates to the early 'push to web' pilots this might take several months, and although we did not discuss this point with Transport Focus directly, it may be challenging (particularly given lockdown measures) to generate a monthly response volume that is close to 750 for the next year. We recommend that ORR works with Transport Focus to understand what a plausible monthly response rate might be over the next 12 months and consider how this might impact the reintroduction of SRUS as a performance metric.⁵⁵

In the medium term, it is important that the move online is an overall positive for measuring user satisfaction. Both Highways England and Transport Focus appeared relatively positive about the online methodology, but it can be challenging to generate response rates for online surveys that are as high as face-to-face methods.⁵⁶ It was also suggested that professional drivers might require an 'inducement' to complete the online survey. ORR might want to stay abreast of the development of the online methodology and consider the mix of online versus face-to-face surveys which make up the overall SRUS scores.

Additionally, it should be remembered that SRUS provides valuable information beyond its use as a performance metric. For example, the open "free text" responses are as useful in some ways as the closed responses, particularly to the Highways England staff closest to operating and managing the roads. We recommend that Highways England continues to work with Transport Focus to ensure these responses remain useful when they are completed online, without the help of an interviewer.

B.3. ROAD USER SATISFACTION TARGETS POST 2021-22

As the total number of SRUS data points grew and the stability of SRUS improved during 2018/19, it became apparent that 82% overall satisfaction represented a reasonable baseline for RP2. However, at the time the Performance Specification was agreed, there was a perceived trade-off between improving road user satisfaction on the one hand and the completion of RIS1 tail projects with the associated short-term disruption on the other. Therefore, agreement on satisfaction targets post 2021-22 was to be sought at a later date.⁵⁷

Future targets will be agreed between Highways England and DfT. ORR's role is to advise the Secretary of State on the Company's plans and the efficiency of any targets it proposes. So, building on the findings and

⁵⁴ Board Session – Customer satisfaction KPI deep dive – Jan21.pptx

⁵⁵ Observation based on results reported in Transport Focus (24 February 2021) "SRUS – restart after Covid-19 suspension". We understand that these are weighted data and that the 'push-to-web' method has a similar target volume as the 'face-to-face' method, so there may be scope to improve response rates and therefore the volume of monthly responses over time.

⁵⁶ The early pilot results that we have seen suggest a survey completion rate of around 3% which is relatively low (Ipsos MORI suggest a range of 15% - 20% can be achieved) – so there is clearly a challenge to improve this over the year ahead. See Ipsos MORI (2019) "Push to web best practice guide: research methods toolkit" available [online](#).

⁵⁷ The Performance Specification targets "year on year increases" post 2021-22 and proposes that "road user satisfaction targets for post 2021-22 are reviewed at the end of the second year of RP2".

recommendations made above, this section considers the potential options for setting the road user satisfaction targets post 2021-22, to inform ORR's thinking on this issue.

The first point to note, however, is that any analysis of the potential trajectory for the SRUS satisfaction measure post 2021-22 must consider the post Covid-19 context and the potential impacts on survey scores, for example (but not limited to):

- **Changes in the traffic structure** (or “journey purpose” and “time of travel”) relative to a pre-Covid baseline. Commuters and business users tend to be less satisfied than average users (76% and 77% versus 81%⁵⁸) largely due to the more congested conditions during peak hours. Professional drivers also report lower overall satisfaction (78% versus 82%).
- **Changes in traffic flows** compared to a (seasonally adjusted) pre-Covid baseline. Although flows have recovered substantially relative to the first national lockdown, and are well above usage levels for other public transport modes, changes in employment trends (e.g. home working) may have an impact on traffic flows on particular roads or regions, e.g. M25. For example, users who travel on the M25 in the weekday peaks (69%) are much less satisfied than the average weekday peak user across all motorways (77%).
- **Moving SRUS online.** Early pilot results suggest that there may be an increase in respondents answering ‘neither/nor’ rather than overall satisfied. ORR should consider the overall size of this effect once there is a sufficiently large number of responses and a stable response rate which in our opinion, at the pre-Covid rate of ~750 responses per month, might take up to six months or slightly longer.⁵⁹ This ‘baselining’ exercise will need to develop a pragmatic post-Covid starting point – i.e. it may not be possible to accurately disentangle the one-off impact of the push-to-web method versus other changes, such as those listed above, and/or other ‘mood of the nation’ factors.

Once a new baseline has been established there are typically two methods that ORR might consider to assess what challenging but achievable SRUS targets might look like: (i) comparative analysis between similar units (in this case, Highways England regions); and (ii) the scope for ongoing incremental improvements (sometimes referred to as “frontier shift” in other regulated infrastructure sectors). There is also a third component that ORR should consider, which is the profile of the investment programme – since the expected profile of roadworks activity will have an impact on customer satisfaction later in RP2.

The drawback with the first of these approaches is that comparative analysis between Highways England's regions is likely to be quite challenging and dependent on the availability of key variables to allow ORR to adjust between different regional characteristics. For example, Fig 2 (on page 11) shows that there are very significant differences between regional satisfaction scores: Yorkshire and the North East performs best (86%) whereas the South West, M25 (both 77%) and South East (76%) perform worst. Additionally, as ORR has noted, the transition from NRUSS (where overall satisfaction was a composite measure) to SRUS (single question) has affected the relative ranking of the regions: the North West consistently underperformed on NRUSS but ranks second highest overall on SRUS.⁶⁰

It was not within scope of this review to analyse and consider regional variations in satisfaction scores. But, noting that regional comparisons will be challenging, we recommend that ORR should continue to develop its regional benchmarking. Specifically, in any future analysis that ORR undertakes to inform its view of an appropriate set of targets for SRUS, we suggest that it considers what data might be available to support a set of straightforward adjustments to regional scores to allow for a better “like-for-like” comparison, and to identify where there may be scope for regions to “catch up”. Adjustments for the following variables might be considered appropriate:

- Differences in the **length (i.e. relative proportion) of A-roads and motorways in each region**, noting that the difference in overall satisfaction is marginal (83% vs 81% all satisfied April 2018 to March 2020).

⁵⁸ All values are overall SRUS satisfaction for the 12 months to March 2020.

⁵⁹ And may depend on the possibility of restarting face-to-face surveys, depending on public health restrictions.

⁶⁰ ORR (February 2021) “Benchmarking highways England: 2020 Progress Report” available [online](#)

- Differences in **traffic density**, which is highest in the South East and lowest in Yorkshire & North East. ORR shows that there is strong correlation with average delay, and therefore it is likely to be a key factor leading to variation in regional SRUS scores.⁶¹

Any such adjustments are likely to be imperfect and they should be considered alongside actual “on the ground” intelligence, such as the impact of roadworks or improvement schemes on the performance of particular roads or regions. But this relatively straightforward analysis may help ORR to identify areas of potential challenge and improvement for Highways England, such as:

- What drives the very significant differences in overall satisfaction between the South West (76% and declining as of March 2020) and Yorkshire & North East (86%). Both regions show similar average delay, although the South West has higher traffic density.
- To what extent is there scope for the Midlands (81%) to continue its recent improvements and catch up with the North West (84%) and Yorkshire & North East.

In addition to exploring regional variations and scope for “catch-up”, ORR should also explore a second approach, which is the potential for incremental, ongoing satisfaction improvements that are achievable over the longer term, by reference to improvements seen in other transport sectors.

Customer satisfaction is not routinely measured for the UK local road network, except for the Transport for London Road Network⁶² (TLRN), but is reported for a range of other public transport modes, including:

- Passenger rail operators – reported by Transport Focus.⁶³
- London bus operators.
- The Docklands Light Railway (DLR).⁶⁴

Each of these modes has its own satisfaction survey and, although we have not studied the detail of these surveys or any methodological changes over time, there are likely to be differences between them (and SRUS) which means any comparison of absolute satisfaction scores across modes should be treated with caution. Although the TLRN might be considered the obvious comparator, it should be noted that average speeds on the TLRN are much lower than the SRN due to the urban environment and more congested conditions.

Nonetheless, we observe that there are multiple operators across modes who routinely achieve overall satisfaction scores in the mid-80s. The DLR (88%), Tramlink (89%) and Dial-a-Ride (91%) have even higher annual targets.⁶⁵

⁶¹ ORR (February 2021) “Benchmarking highways England: 2020 Progress Report” available [online](#)

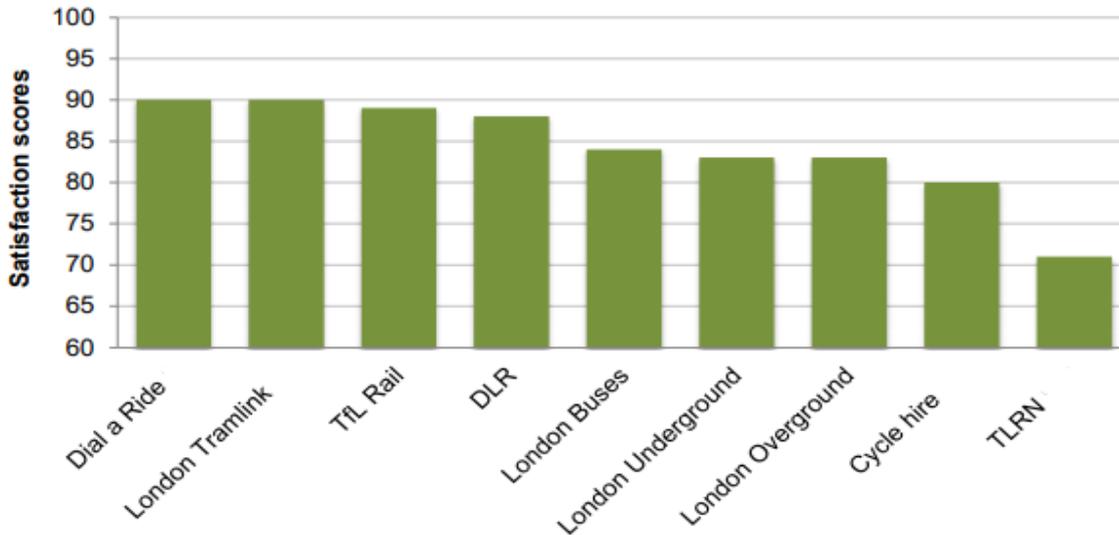
⁶² London TravelWatch (February 2020) “TfL 2019-20 Quarter 2 Performance Report” available [online](#)

⁶³ Transport Focus (July 2020) “National Rail Passenger Survey – Spring 2020” available [online](#)

⁶⁴ TfL (June 2019) “Customer service and operational performance report – Q4 2018-19” available [online](#)

⁶⁵ TfL (June 2019) “Customer service and operational performance report – Q4 2018-19” available [online](#)

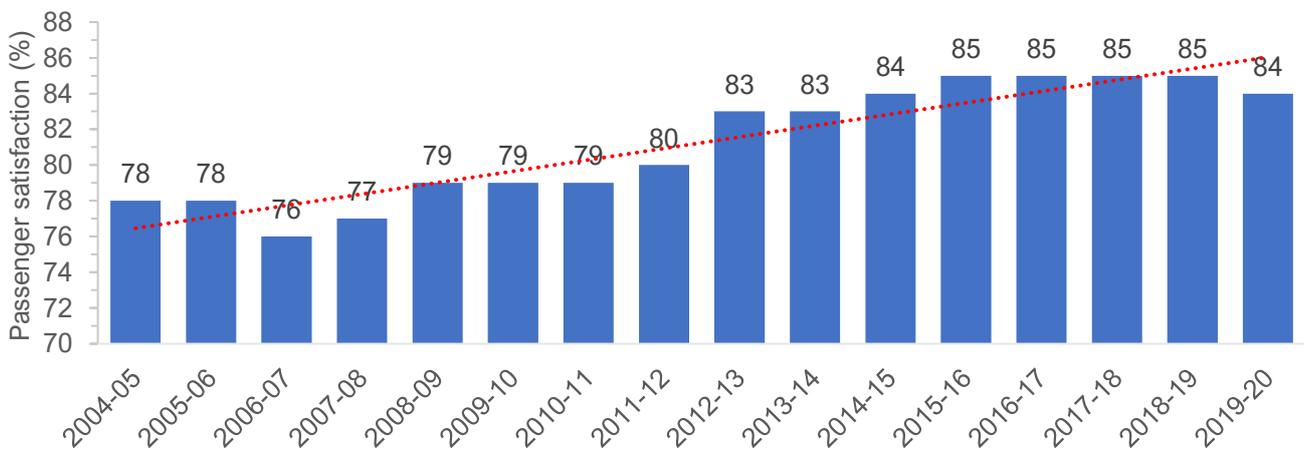
Fig 12: Overall customer satisfaction scores – comparison across London modes (Q2 2019-20)



Source: London TravelWatch

Overall satisfaction performance has improved across many of these modes over the last decade, as shown in Box 9 on the following page, and for London Underground in Fig 13 below. At the top end, TfL Rail has seen a rapid improvement in recent years: the latest data suggests satisfaction is 89%, up from 81% in 2017/18 Q4.⁶⁶ The main exception is the TLRN where satisfaction scores fell from around 76% in 2013-14 to 71% in 2018-19, a trend which is likely influenced by falling average speeds on the TLRN and increasing congestion in London.⁶⁷

Fig 13: Overall satisfaction with the London Underground (2004-05 to 2019-20)



Source: CEPA analysis of TfL data

We observe that, across those modes where satisfaction improvements have been sustained, **average annual improvements of around 0.5 percentage points per year are possible.**

⁶⁶ TfL (June 2019) “Customer service and operational performance report – Q4 2018-19” available [online](#)

⁶⁷ TfL (June 2019) “Customer service and operational performance report – Q4 2018-19” available [online](#)

Box 9: Customer satisfaction trends on London transport modes

Fig 14: Overall satisfaction with the Transport for London Road Network (2011-12 to 2018-19)



Fig 15: Overall satisfaction with London Buses (2011-12 to 2018-19)

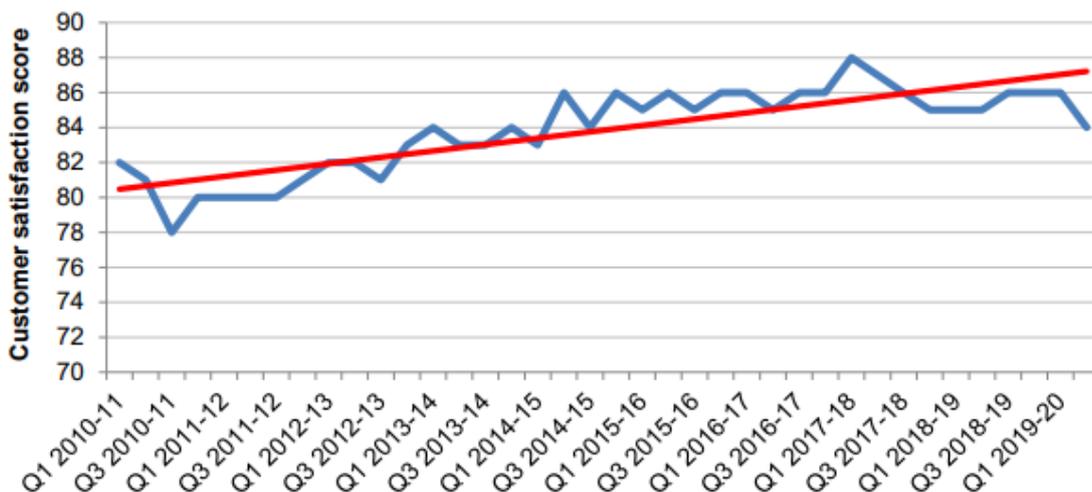
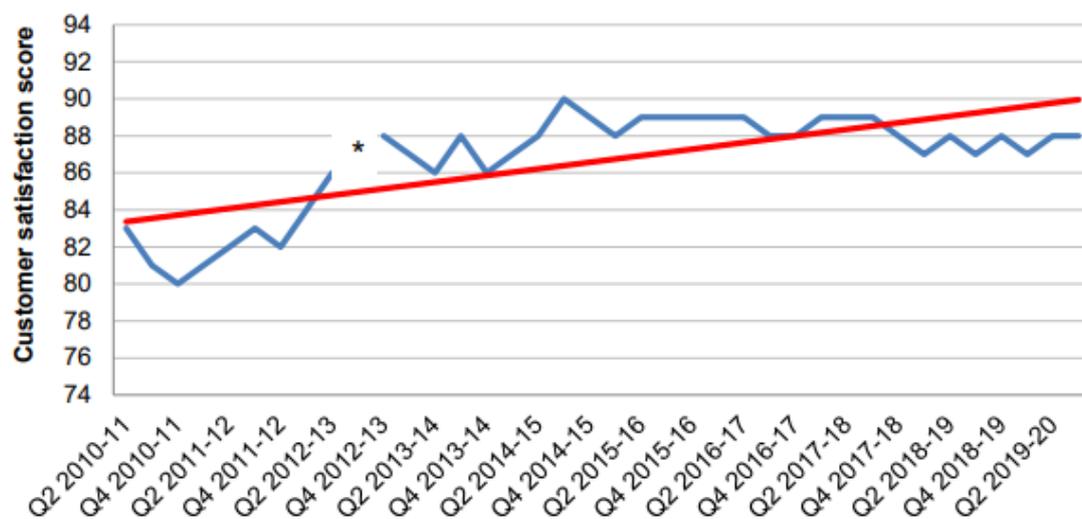


Fig 16: Overall satisfaction with the DLR (2011-12 to 2018-19)



Source: London TravelWatch

We recognise that comparisons between these modes and Highways England's network should be treated with caution because of the different characteristics of e.g. a timetabled rail service and the SRN. But, more importantly, when considering options for the trajectory of the SRUS target post 2021-22, we consider that it is reasonable to draw comparisons about *trends*, as opposed to absolute levels of satisfaction (noting that, in any case, the starting point for SRUS should be re-baselined post-Covid).

So, subject to the further consideration of the impacts of Covid-19 and the transition to an online survey method on overall satisfaction scores once there is a larger number of overall responses, it would not be unreasonable to 'back-calculate' an approximate push-to-web equivalent to 82% as a starting target, and to incorporate a gradually more stretching improvement in the target over time. The Company has achieved scores in the region of 83% (12 month average) in the past⁶⁸, and so it we consider that a suitably stretching target for the end of RP2 would be for the company to sustain scores in the region of 83–83.5% (pre adjustment for any push-to-web impact).

PART B: CONCLUSIONS AND RECOMMENDATIONS

- In the absence of SRUS, or with only partial data, for 2020-21 and 2021-22 it would be appropriate for ORR to consider placing weight on multiple sources of evidence, rather than relying on any one metric.
- ORR should consider the available sources further but will need to take a pragmatic approach.
- We would recommend placing the most weight on Highview, consistent with the principle that performance metrics should measure outcomes where possible, and because it appears to be the best (however imperfect) available indicator for customer satisfaction.
- Highview is tracking at 79.5% for the 12 months to December 2020. Given that there is likely to be a difference of between 2.0–3.5 percentage points between SRUS and Highview, this would imply that SRUS would be tracking at between 81.5%–83.0% or roughly in line with Highways England's SRUS target.
- However, we suggest that ORR considers making a downwards adjustment of around 0.5% to take into account the windfall impact of reduced traffic flows and higher average speeds due to Covid-19 lockdown measures.
- SRUS will need to be re-baselined, so it is too early to set definitive SRUS targets for 2022-23 onwards.
- Any analysis of the potential trajectory for the SRUS satisfaction measure post 2021-22 must consider the post Covid-19 context and the potential impacts on survey scores, e.g. changes in traffic structure and flows, and changes in the underlying SRUS sample and scores due to the online survey method.
- There are some findings in the survey literature which indicate that the survey method can influence the response – particularly when the questions are trying to elicit information which might be considered sensitive or counter to social values/norms – but the methodological effects vary by study, depending on the issue, sampling approach and question design.
- Early pilot results of the push to web method show a significant impact on overall satisfaction scores, mainly due to an increase in 'neither/nor' responses rather than dissatisfaction. But response rates were relatively low in those pilots and ORR should consider this issue further once there is at least six months of emerging data from the restarted SRUS survey.
- When comparing reported customer satisfaction trends across other modes of transport, we find that average annual improvements of around 0.5 percentage points per year are possible to sustain over the medium term.
- So an appropriately stretching but achievable set of targets (pre-adjustment for any push to web impact) post 2021-22 would be:
 - 2022-23: 82.5% (on a pre-Covid basis)
 - 2023-24: 83.0% (on a pre-Covid basis)
 - 2024-25: 83.5% (on a pre-Covid basis)

⁶⁸ Overall SRUS satisfaction in April 2019 (82.9%), May 2019 (82.9%), June 2019 (83.0%) and July 2019 (82.9%).

SUMMARY OF RECOMMENDATIONS

Ref	Issue	Recommendation
A1	SRUS processes	Once the survey has been relaunched, ORR should continue to monitor how Highways England is improving its use of SRUS to measure and demonstrate the effectiveness of the actions it takes to improve customer service on the network.
A2	Regional sharing of best practice	In the context of understanding regional differences in SRUS performance, ORR should follow up on this study to obtain more detailed examples to demonstrate how Highways England is disseminating customer satisfaction learning and best practice between its regions.
A3	Line of sight	ORR should satisfy itself that Highways England followed a clear and logical process to develop its Customer Service Plan, including that there are clear links back to SRUS, and should review how the Company has performed against those commitments.
A4	Finding the right balance	We recommend that ORR continues to engage with both Transport Focus and Highways England, to ensure that the right balance is struck between less noticeable but gradually compounding marginal gains and the 'big ticket' items which often receive the most management attention.
A5	Links between recurrent delay and SRUS	Given that 'satisfaction with journey time', 'traffic level' and 'actual vs expected journey time' are the most important drivers of overall satisfaction, ahead of RP3 ORR should satisfy itself that Highways England is exploring whether there are affordable options which help (at least at the margins) to reduce the impact of recurrent delay, which is by far the largest component of delay.
A6	Links between journey planning information and SRUS	Given that users have growing expectations of the quality of journey planning information, we recommend that ORR should engage with Transport Focus, Highways England, and other relevant stakeholder groups to understand whether there is more that could be done to help road users plan their journeys in advance to avoid unnecessary delays and improve customer satisfaction.
A7	Driving the agenda for RIS3	Highways England has the best information about the network and should use that to shape the RIS agenda with DfT. Specifically, we recommend that Highways England should consider how best to use this information to drive a debate on the relative benefits of new large schemes versus investing in maintenance and renewal of the existing network.
B1	Online SRUS survey	ORR should keep abreast of any methodological developments to SRUS so that it has a good understanding of the potential impacts of any new changes when the survey restarts.
B2	Monitoring without SRUS	ORR should consider the alternative available sources further, but it will need to adopt a pragmatic approach. ORR might consider some combination of sources, but we recommend using Highview as the primary alternative source, consistent with the principle that performance metrics should measure outcomes where possible, and because it appears to be the best (however imperfect) available indicator for customer satisfaction.
B3	Highview	If ORR decides to base at least part of its assessment on Highview, then it should consider whether there would be value in any further, more detailed analysis of the differences between SRUS and Highview. For example, it may be worth exploring trends in the underlying sample (e.g. journey purpose and regional breakdown of responses) and identifying the scale of those differences with SRUS, which will allow ORR to present a caveated but pragmatic analysis of customer satisfaction in its annual assessment.
B4	Covid-19	As part of its assessment of performance, ORR should consider how it might adjust the evidence to account for the change in traffic flows as a result of Covid-19 lockdown measures, which are likely to have had a positive "windfall" impact on satisfaction scores during 2020.

Ref	Issue	Recommendation
B5	Re-baselining SRUS	Early push to web' pilot results suggest that overall satisfaction will need to be adjusted for the change in survey method. But first Transport Focus needs to obtain a higher monthly response rate and ensure that the sample is representative of the general user population. ORR should review this issue further once there is at least six months of emerging data from the restarted SRUS survey.
B6	SRUS targets post 2021-22	<p>Once SRUS has been re-baselined, ORR should consider the available evidence to advise DfT on an appropriately stretching but achievable set of national-level targets post 2021-22. This might include:</p> <ul style="list-style-type: none"> • comparative analysis between Highways England regions to identify potential for “catch-up”, incorporating some proportionate adjustments to ensure a better “like-with-like” comparison, and • comparisons with longer-term customer satisfaction trends in other transport modes.

Appendix A CUSTOMER PRINCIPLES FOR ROADWORKS

This appendix provides the 20 customer principles for roadworks set out in the “Roadworks Implementation Toolkit” guidance document.

Table 2: The 20 customer principles for roadworks

No.	Roadworks Principle
Planning and designing traffic management	
1	Other roadworks and improvements Plan and integrate with other roadworks, infrastructure and maintenance projects so that the total impact on customers is understood and mitigated.
2	Speed of delivery Explore ways to reduce the time roadworks take without increasing disruption to customers.
3	Length of roadworks Seek shorter lengths of roadworks, staggering activity to minimise disruption to any one customer journey.
4	Lane width Widen non-standard or temporary ‘narrow’ lanes within roadworks where possible.
5	Speed limit Use appropriate, flexible speed limits and update these to reflect road conditions and the level or nature of road work activity. Consider higher limits for periods of lower traffic volumes, for example at night.
6	Line demarcation Make sure temporary lanes are clearly marked, especially at night or in bright sunlight.
7	Visibility of temporary barrier Use temporary barriers with good visibility, especially in roadworks with narrow lanes.
8	Night time visibility Improve night time visibility of lane markings and temporary barriers in roadworks.
Providing information	
9	Advance notice of works Give adequate notice of works so that our customers can plan accordingly.
10	Scheme information at the roadside Use signs to provide reasons and timescales for the work. Display scheme specific information along diversion routes.
11	Electronic signage Use electronic signs where possible. Electronic messages are perceived as more up to date than hard signs.
12	Travel time through roadworks Provide road users with an estimated time for travelling through the roadworks, using variable message or hard signs. Place travel time signs repeatedly along the roadworks and diversion routes. Positioning and repetition is important.
13	Visible progress Keep customers updated about overall progress of the roadworks. This should be done via signage in the works and through other media. Include key milestones and what has been completed. Focus on counting down to completion, not up.
Engaging and communicating with customers	
14	Local communications and outreach Keep residents and other communities engaged with the project through regular communications and outreach. Widen the catchment area, going beyond those immediately affected by the work. Reach out to

No. Roadworks Principle

communities living along diversion routes, at local commuter hubs and customers who use the route on long distance journeys.

15 Use multiple communication and engagement channels, regularly

Provide information frequently, using multiple communication and engagement methods 15 suitable to the demographic of identified customer groups.

16 Impactful messages

As well as communicating the facts (what is happening, the duration of works and the completion schedule) use messages which resonate positively with our customers. Tell people about how the project is meeting local priorities, delivering benefits and reducing disruption for road users and communities.

17 Explain no activity

Find ways to explain 'why' when no visible activity is taking place within roadworks. This 17 should help to reduce a key source of customer frustration.

18 Seek customer feedback on new traffic management

Organise an early customer drive-through of new traffic management to spot issues, areas for improvement, driver behaviours and any unintended consequences.

19 Understand customer experience

Engage regularly with customers of the scheme to get feedback on the impact of the works, including diversion routes. Use this feedback, alongside other sources of evidence and insight, to scope and evaluate changes which will help to improve customer experiences.

20 Complete the feedback loop

Communicate how customer input has influenced delivery and project management. 20 Highlight benefits to customers when these are realised.

Appendix B CUSTOMER MATURITY CRITERIA

This appendix provides the 20 questions asked in the Customer Maturity Self-Discovery Assessment (Table 3) and a case study describing the regional customer maturity self-assessment process, including the sharing of best practice and development of the regional service plan, for the North West region (Box 10).

Table 2: Customer Maturity Self-Discovery Assessment Criteria

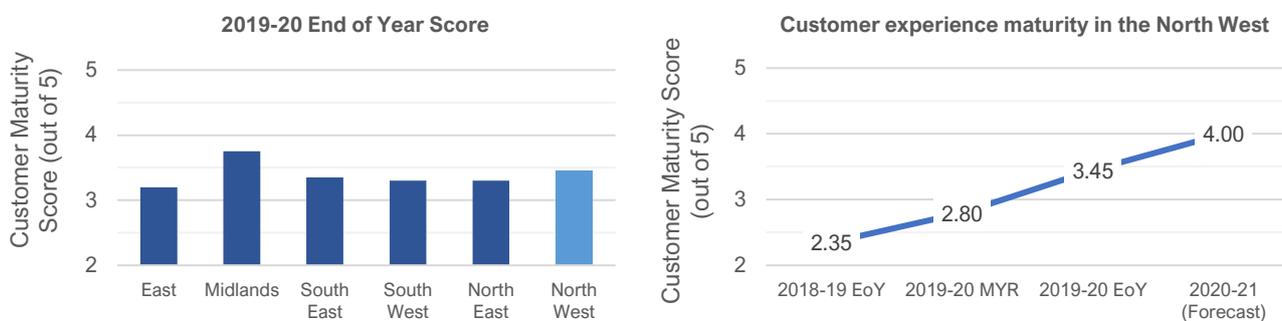
“We utilise social media to build relationships with our customers and communicate key messages”	“We pro-actively communicate to customers and keep them informed”	“Customer experience is an integral part of supplier evaluation criteria”	“We strive to improve the quality and timeliness of our customer correspondence”
“We use various forms of insight to drive improvement suggestions”	“We work closely with key stakeholders and know how we impact their customers”	“Customer commitments are completed and we update customers on progress”	“We have a range of customer service improvement initiatives and customer focussed projects”
“We put the customer at the heart of our decision making”	“We identify different customer groups and plan for their needs accordingly”	“We utilise customer insight to drive our action plans and this has shown tangible improvements”	“We look at ways of improving the customer journey through roadworks”
“We share best practice and lessons learned with colleagues from other regions”	“We have colleague feedback mechanism where we are listened to and our feedback is acted upon”	“We understand the level of customer service we provide and know where we need to improve”	“Everyone is clear on how their role contributes to delivering a great customer experience”
“We train our colleagues in how to deliver exceptional customer service”	“We measure and review the quality of our complaint handling”	“We use root cause analysis and trends to reduce future complaints and inform improvement plans”	“Complaints are responded to in a timely manner and we know how many complaints are unresolved”

Box 10: Example of the Customer Maturity Self Assessment by one of the Regions

All of the regions complete a customer maturity self-discovery assessment to rate their customer behaviours. They assess their behaviours across 20 criteria (or “statements”) representing good practice (see Table 3) on a scale of 1 (“we never do this”) to 5 (“we do this all the time”), with supporting evidence to justify the score given. A recent example response from the North West’s self assessment is provided below.

Statement	Score	Selected activities undertaken
We pro-actively communicate to customers and keep them informed	Most of the time (4)	<ul style="list-style-type: none"> • Operations schemes are RAG rated to determine customer impact and disruption and a communication plan is produced for all Amber and Red rated schemes. • A weekly roadworks bulletin highlighting is shared with stakeholders and the press. • Customers are communicated with on a ‘route based approach’. The M56 has a dedicated web page informing of works on this stretch. A similar approach is planned for the A590 route.

Once the answers have been centrally verified and moderated, regional performance is compared against other regions and over time. This can be seen in the charts below, showing that the North West had the second best score as at the end of 2019-2020 and has increased its score from 2.35 to 3.45 over the past two years. This increase in score reflects their average response across the criteria going from just above 2 (*‘hardly ever’* exhibit the behaviour), to between 3 (exhibit the behaviour *‘some of the time’*) and 4 (*‘most of the time’*).



Highways England identifies areas of best practice and shares it through the Centre of Excellence and by “buddying up” the best performing regions with other regions on particular issues. For example, the North West’s best practice included ‘using customer experience as an integral component of supplier evaluation and monitoring’ and ‘identifying different customer groups and planning for their needs’. Supporting evidence provided for the latter of these examples included trialling multilingual signs for HGV drivers and using text alerts instead of social media for an older demographic of users.

An action plan is then devised for each region to improve performance. For the North West this is targeted to improve their overall score from 3.5 to 4 by the end of this reporting year, and includes milestones and actions for nine different areas (e.g. correspondence, roadworks accuracy, etc). Milestones include improving performance against metrics, demonstrating good processes, or incorporating principles into working practice; actions are steps outlined to achieve these metrics, e.g. selecting key performance measures, setting a target, or beginning monitoring.

An example of a milestone for the North West is the adoption and reporting of the 20 principles across all their schemes. The actions to achieve this milestone are to agree a format and process for reporting the principles adoption and to complete and provide a standard report of adoption to the CWG.

Sources: 1. North West CWG Customer Service Plan – Actions and Milestones; 2. North West Region Customer Maturity RD Pack; and 3. North West Region Customer Maturity Self Discovery 2019-2020

Appendix C CUSTOMER ROADWORKS AUDITS

Highways England uses “roadworks audits” to understand and monitor the customer experience through roadworks schemes, and to identify where improvements are needed.

The audits are a mystery shopper –style exercise conducted by Ipsos MORI from the perspective of road users. Each auditor travels as a passenger through a sample of different roadworks schemes. Each scheme receives 10 audits per month including at least one recorded video journey. Auditors are asked to observe and score the scheme across a series of ‘Evidential’ (lane marking, surface smoothness, clear & unobstructed signage, provision of information to explain the works, visibility of active workforce, and electronic signage displaying distance and travel time through the works) and ‘Perception’-based questions (lighting, works management and appearance, length of works, overall impact) – there are 15 questions in total.⁶⁹

Some of the key results and messages from the September 2020 report included:

- **Delays on key schemes.** “September saw an increase in the proportion of auditors (1 in 5) saying the roadworks added a ‘significant’ delay to their journey [...] one possible explanation could be an increase in September road traffic, although this is difficult to evidence from the mystery shopper data.”
- **Delays and the need for appropriate signage.** “Where delays occur it is important that communication is strong, however [on the A27 East of Lewes] 8 of the 11 auditors reported that the signage was not appropriate and 9 of the 11 reported that the signs were obstructed.”

Amongst the Evidential-based results, signage appears as a clear theme:

- “The overall ‘appropriate signage’ score fell by 7 percentage points”.
- 83% of auditors said there were no signs explaining why the workforce was not visible, and 23% of auditors said there was no signage to explain the reason for the roadworks and timings;
- “Signs free from obstruction declined again in September, indicating that management of over hanging foliage has not been put in place across certain schemes.”

Figure 17: Individual scheme extract from Customer Audit Report – September 2020

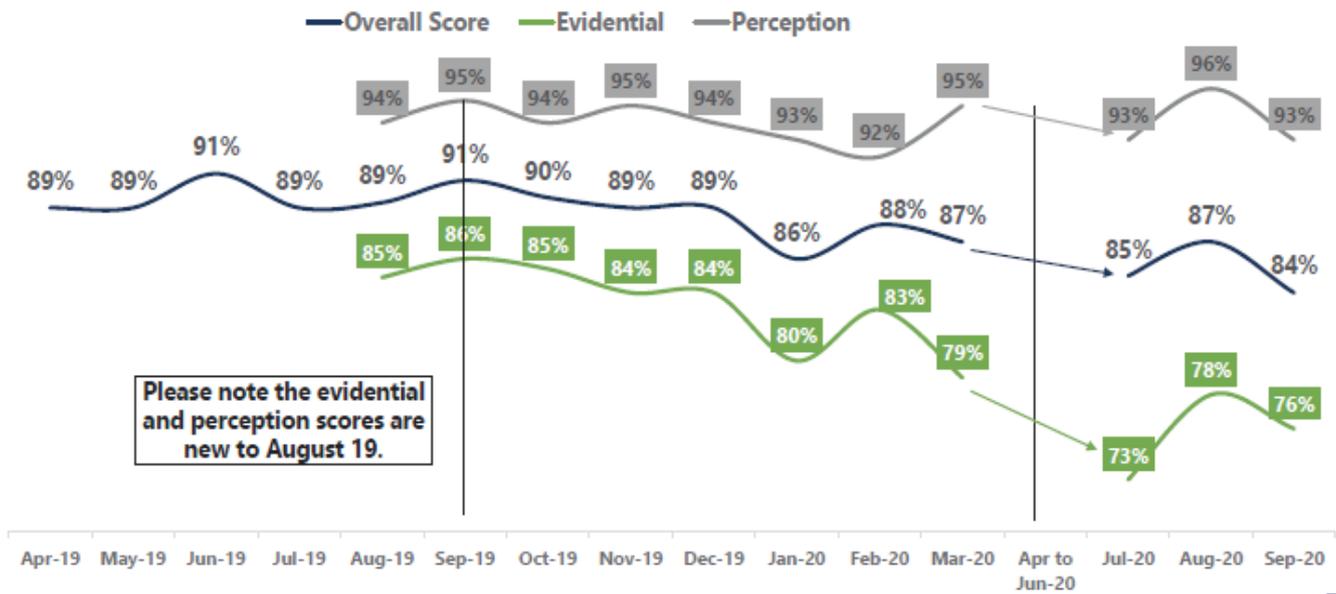


Source: Ipsos MORI (September 2020) Highways England Customer Audits Monthly Report

⁶⁹ Customer Audit Report September 2020.pdf

The 'perception' and 'evidential' scores are then combined to produce a score per scheme. The figures below are taken from the September 2020 Customer Audit Report, showing the overall score (month-on-month) and individual scheme scores. They show that the Perception-based scores have remained relatively stable over the last year, whilst there has been a slight deterioration in Evidential-based scores.

Figure 18: Overall headline Customer Audit scores – September 2020



Source: Ipsos MORI (September 2020) Highways England Customer Audits Monthly Report

Figure 19: Overall scheme Customer Audit scores – September 2020

Overall Scheme Scores – September			
Scheme	Overall Score %	Evidential Score %	Perception Score %
A19 Testos	96%	96%	96%
M1 J13 - 16	94%	91%	97%
M6 J13-15	88%	79%	99%
M4 J3-12	87%	90%	85%
A19 Norton – Wynyard	87%	79%	95%
M27 J4 - 11	86%	80%	91%
A1 Scotswood Brunton	86%	75%	100%
M6 J19	86%	78%	95%
A45/A6 Chowns Mill	86%	74%	99%
A2 Bean to Ebbsfleet	86%	75%	96%
M62 J10-12	78%	65%	93%
A27 East of Lewes	73%	64%	82%
M6 J10	69%	50%	93%

Source: Ipsos MORI (September 2020) Highways England Customer Audits Monthly Report