

# Logistics and Coach Manager Survey Results presentation for Transport Focus

Publish version – October 2018  
By BVA BDRC



1. Transport Focus represents users of the Strategic Road Network (SRN)
2. Transport Focus measures satisfaction amongst drivers and passengers.
3. Logistics and coach businesses move a nationally important level of freight and passengers over the SRN so a **key stakeholder of SRN performance**
4. The importance of knowing satisfaction among this audience was emphasised through a stakeholder consultation.
5. Transport Focus hopes this to be an annual tracker and BDRC appointed to run first wave of the survey

# Methodology overview

## Research set up stage

1. BDRC conducted qualitative research as a precursor for questionnaire design to:
  - understand the issues of most interest
  - the language which the sector uses
  - what they say influences satisfaction
2. Questionnaire used rated:
  - overall satisfaction
  - planning information,
  - managing incidents,
  - road surfaces,
  - Highways England network management
  - what they want to see improved



### Qualitative research – summary of findings

1. The SRN is of **huge strategic importance to the sectors**
2. **Ensuring the reliability and consistency of journey times** on the SRN. **Time** almost universally makes or breaks journeys in this sector.
3. High degree of resignation that delays and congestion will occur. This is the **main area of frustration**, business feel that not necessarily much can be done to improve the situation.
4. But do see room for improvement with other aspects, in particular the **provision of real time information** and the **management of the roads in the event of an accident**.
5. **Low awareness** of Highways England's responsibilities. **Few** businesses feel they have any kind of relationship with them.

**RATING CURRENT OPINION OF SRN, NOT MOST RECENT JOURNEY**

**QUESTIONS ASK ABOUT BUSINESS NOT DRIVER IMPACT**

## Sample design

1. Used 'O' Licence database – a complete register of all businesses who run vehicles over 3.5 tonnes
2. Sampling design developed jointly with Transport Focus. Segmented by licence type and fleet size (vehicles specified).

	Licence numbers	% of Licences	Sum Vehicles	% of vehicles	Blend of % licences/vehicles
Restricted	30,155	50	85,610	22	36
Standard	30,104	50	299,643	78	64
<b>Grand Total</b>	<b>60,259</b>	<b>100</b>	<b>385,253</b>	<b>100</b>	<b>100</b>

Restricted	Licence numbers	% of licences	Sum vehicles	% of vehicles	Blend of % licences/vehicles	Share of full sample
One	16,385	54	16,385	19	37	13
2 to 5	10,983	36	30,048	35	36	13
6 +	2,787	9	39,177	46	28	10
<b>Sub total</b>	<b>30,155</b>	<b>100</b>	<b>85,610</b>	<b>100</b>	<b>100</b>	<b>36</b>

Standard	Licence numbers	% of Licences	Sum Vehicles	% of vehicles	Blend of shares	Share of full sample
1 to 5	20,723	69	42,978	14	42	27
6 to 20	6,630	22	69,254	23	23	14
Over 20	2,751	9	187,411	63	36	23
<b>Sub total</b>	<b>30,104</b>	<b>100</b>	<b>299,643</b>	<b>100</b>	<b>100</b>	<b>64</b>
<b>Total</b>	<b>60,259</b>		<b>385,253</b>			

Used two approaches to discover best approach to reaching this audience: a) direct calling of these businesses and b) sending the same questions by post for self-completion.

- A. Collected 700 responses via telephone interviewing, the larger segment of response. Potential respondents were mostly cold called and requested to participate. We also trialled where sending a letter about the survey before phoning to see whether this would increase participation rate, but it stayed more or less the same. The person targeted for participation was the named 'O' licence database licensee (or one chosen at random if the firm had more than one).
- B. With the paper approach we sent three letters to a 1400 random subset of the sample from the 'O' licence database to the named licensee. The first mailing was a letter + questionnaire, the second a reminder letter but no questionnaire, the third a reminder letter + another questionnaire. Overall we had 380 returns (although by cut off point we have included 368 in the analysis) a response rate of **27%**.

Some small weights were applied by licence and fleet size categories to normalise the response profile to the sample profile

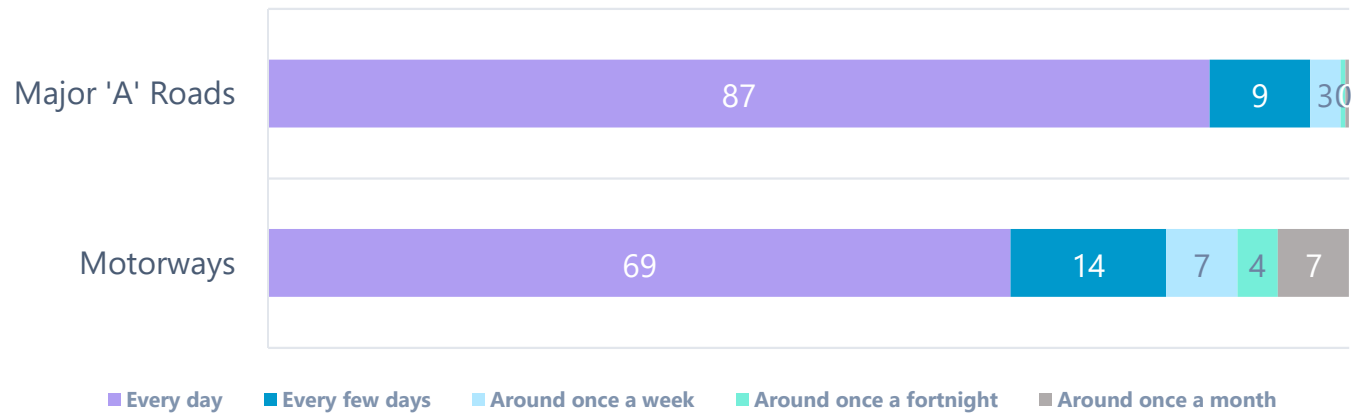
Trade bodies (CPT, FTA and RHA) informed their members of the survey and recommended completion.

# Profile of the logistics and coach sector responses



# Usage of SRN among respondents

- The vast majority are using SRN every few days
- Major 'A' road usage is a little more frequent than motorways

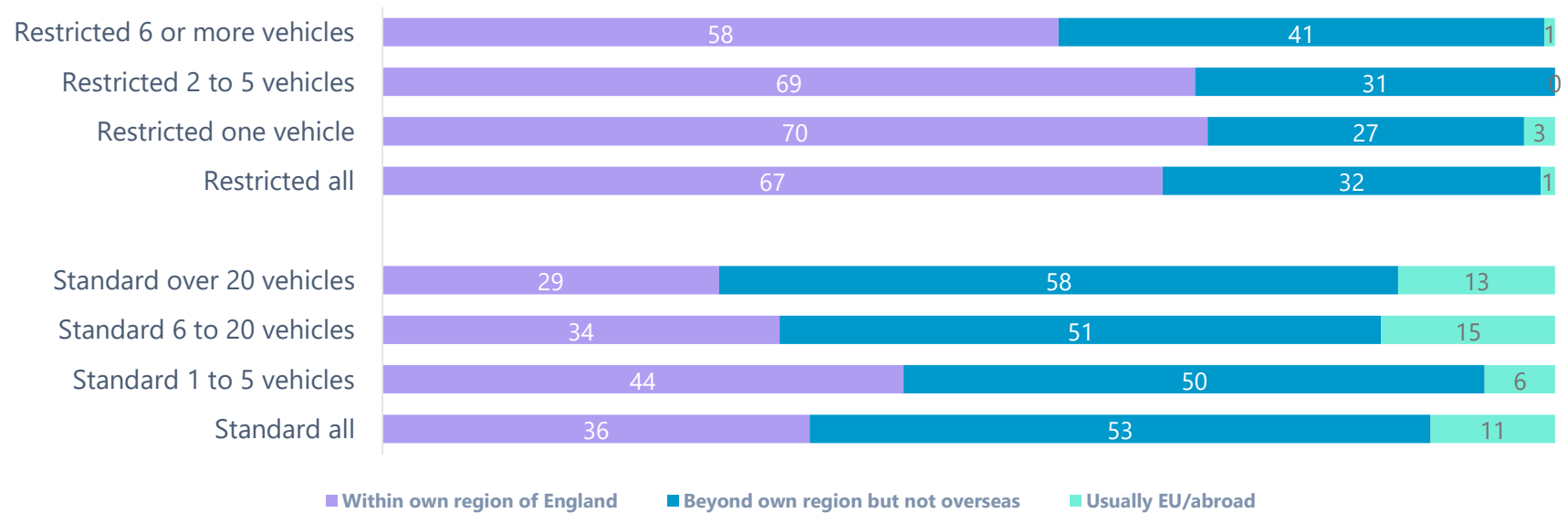


C2A and C2B. How often do your vehicles use....  
Base sizes: Motorways 1049; Major A Roads 1054



# Geographical extent of travel among respondents

- Restricted licences (carrying own goods) much more likely to travel in own region of England
- Standard licensees go over a much wider distance, and for larger firms some EU travel.

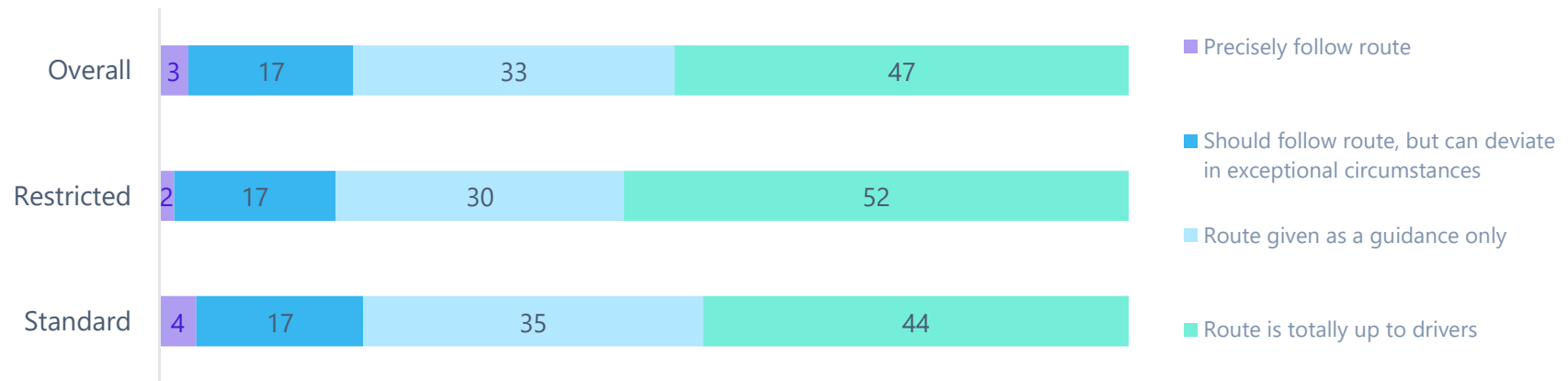


C2A and C2B. How often do your vehicles use...

Base sizes: Restricted (in order) 116, 132, 105, 353; Standard (in order) 295, 156, 256, 707

# Choosing the vehicles routes

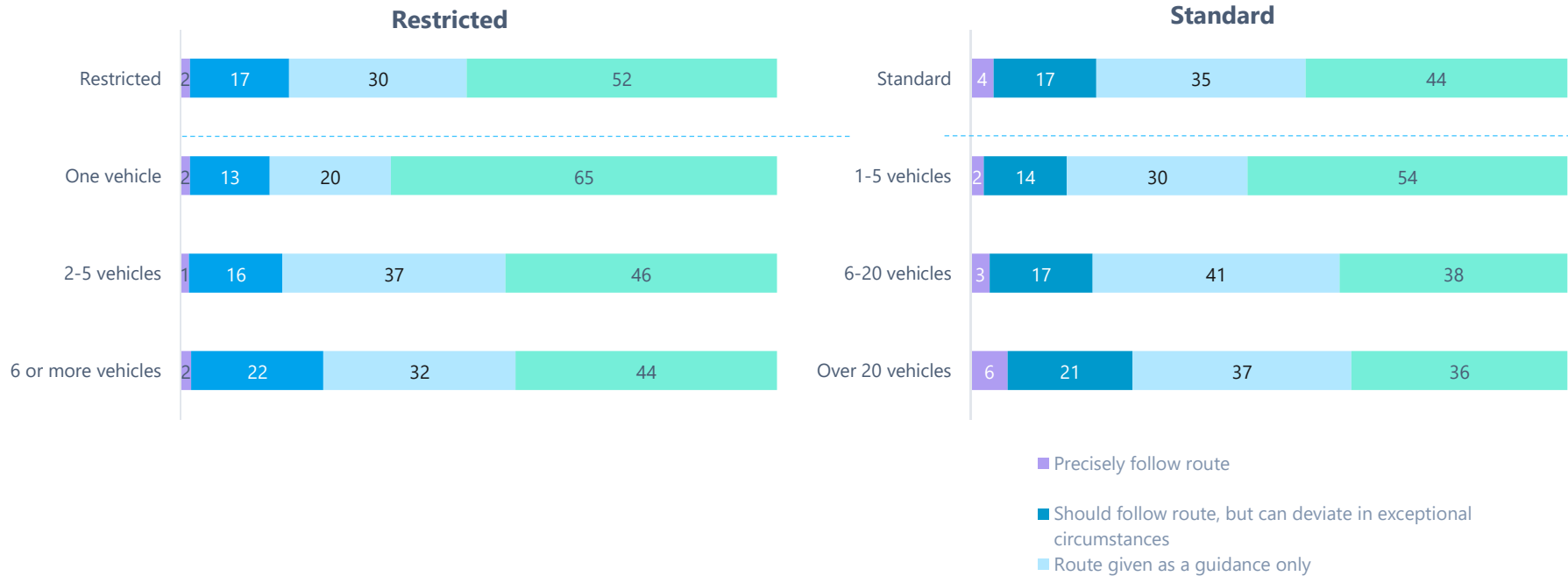
- Around half of sector allow drivers complete freedom to choose routes
- In about a fifth of case routes reasonably prescribed
- A little less up to drivers for Standard licence holders



Q5. How much input do your drivers have when planning their routes?  
 Base sizes: Overall 1,062; Standard 708; Restricted 354

# Routes to follow – by fleet size

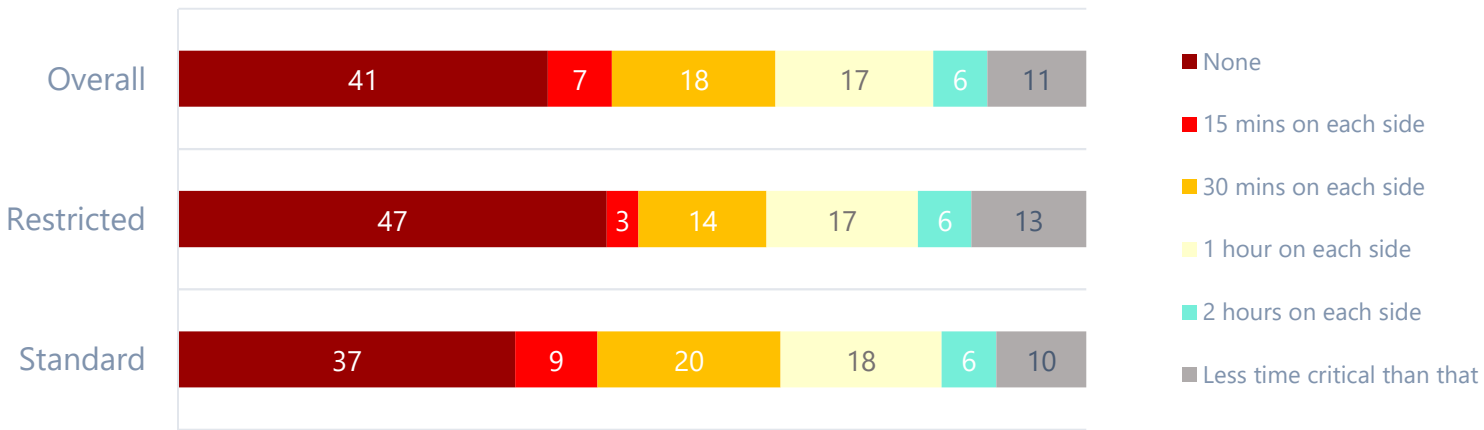
- Drivers of smaller fleets have significantly higher level of freedom to chose their routes



Q5. How much input do your drivers have when planning their routes?  
 Base, all answering: Restricted (in order) 354, 115, 132, 107; Standard (in order) 708, 293, 157, 258.

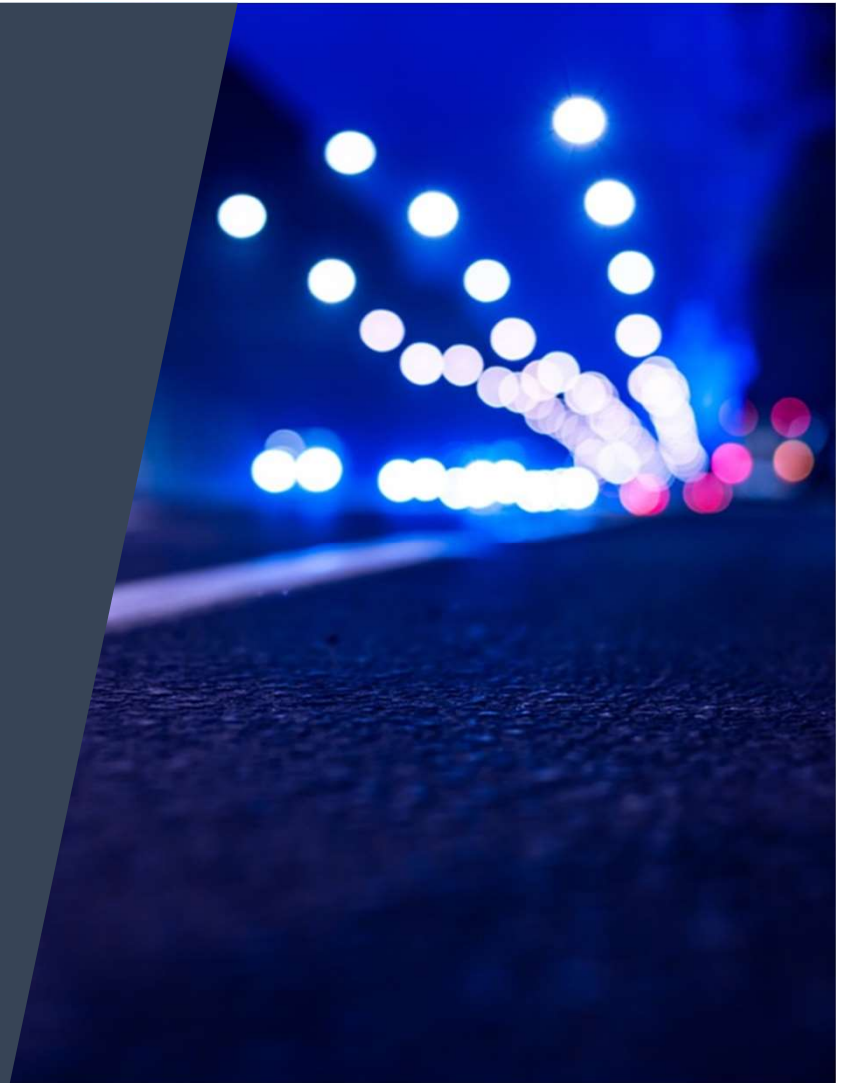
# Contingency times for deliveries or coach services

- Two-fifths of firms say they have no contingency time (higher among restricted licences)
- Two-thirds need to be within the hour
- Shows the time criticality of the sectors



Q16. What amount of contingency time are you allowed either side of when your deliveries/coach services are meant to arrive?  
 Base sizes: Overall 1054; Restricted 351; Standard 703

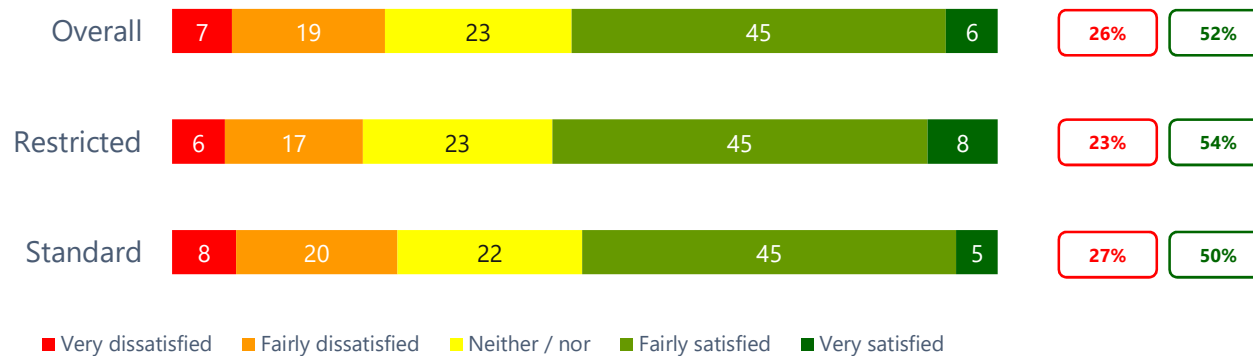
Overall satisfaction...



# Overall satisfaction

- Only half of SRN users are satisfied – few are very satisfied
- Around a quarter are dissatisfied
- No real difference by licence type

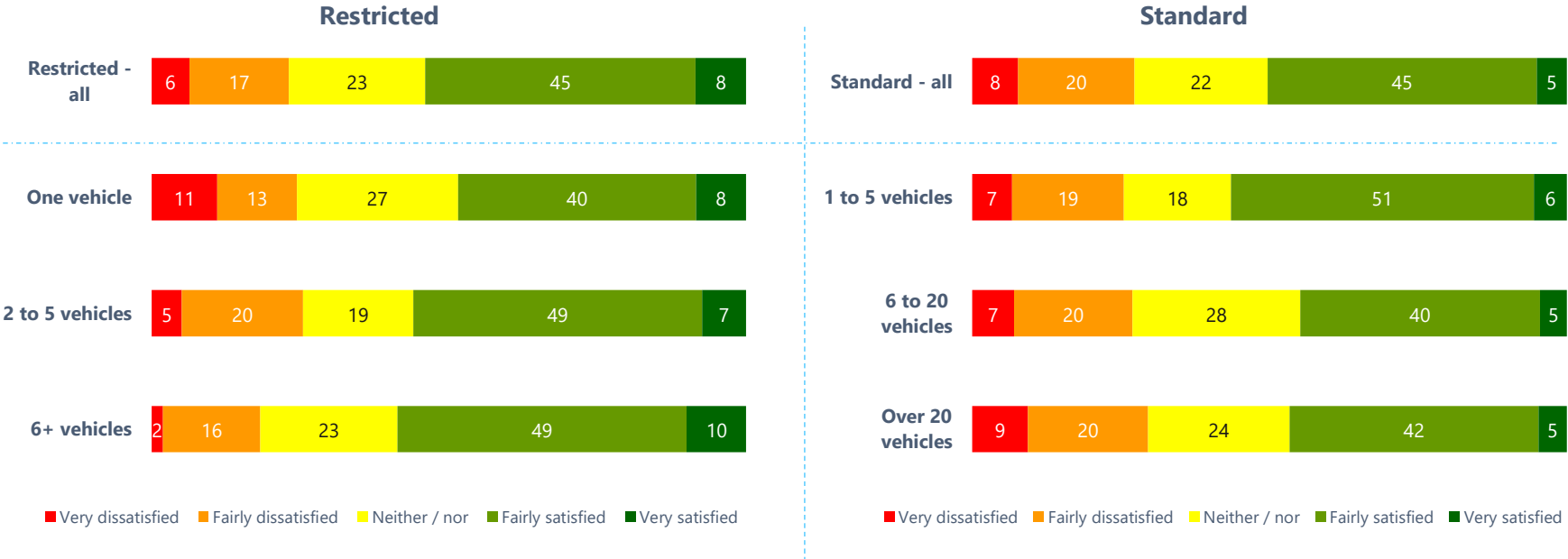
Rating current opinion of SRN, not most recent journey  
 Questions ask about business not driver impact



Q4. Thinking overall about the motorways and major 'A' roads of England, how satisfied or dissatisfied are you with the way they meet your needs as a business?  
 Base sizes: Overall 1060; Restricted 355; Standard 705

# Overall satisfaction

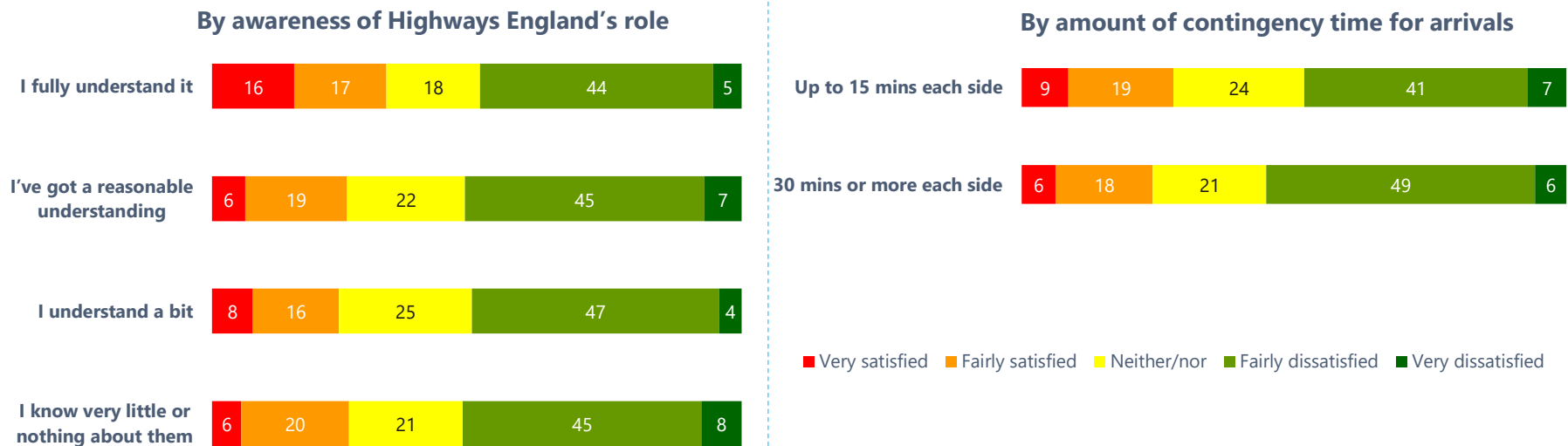
- Larger restricted fleets and smaller Standard fleets marginally more satisfied



Q4. Thinking overall about the motorways and major 'A' roads of England, how satisfied or dissatisfied are you with the way they meet your needs as a business?  
 Base sizes: Restricted (in order) 355, 116, 132, 107; Standard (in order) 705, 292, 156, 257.

# Overall satisfaction – by knowledge of Highways England role and contingency time

- Those who fully understand HE role have marginally more dissatisfaction
- Satisfaction a little higher for those with more contingency time

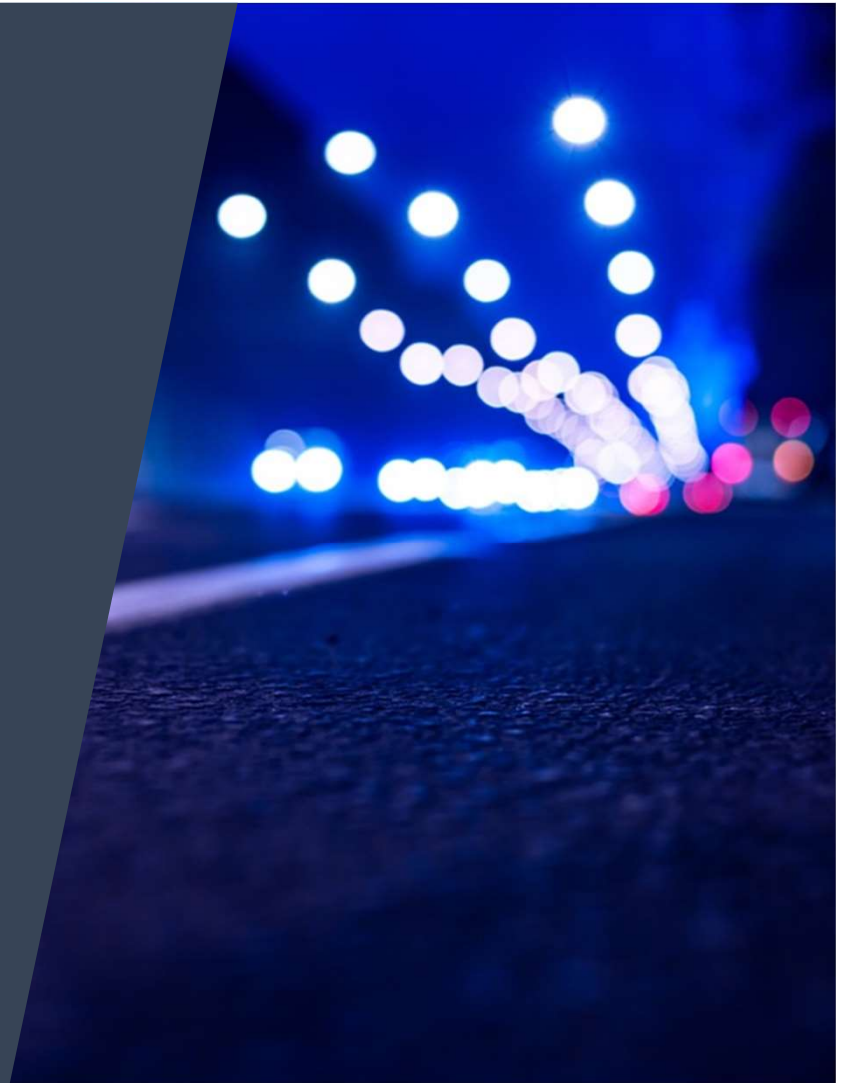


Q4. Thinking overall about the motorways and major 'A' roads of England, how satisfied or dissatisfied are you with the way they meet your needs as a business?

Bases size: Awareness (in order) 90, 473, 277, 216: Contingency (in order) 502, 547.

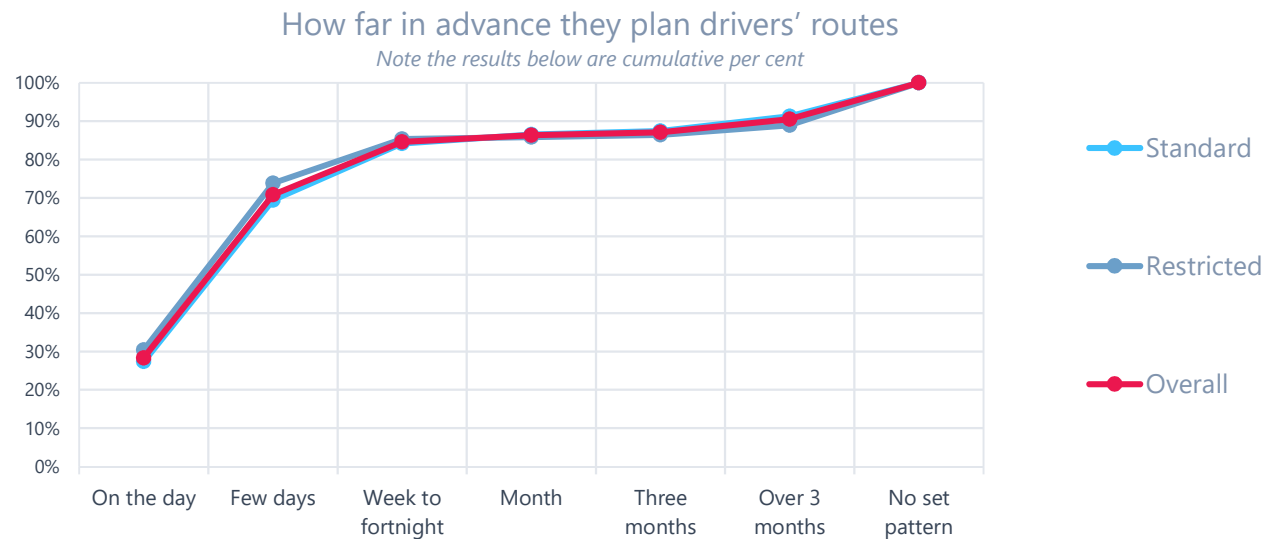


# Planning & Information



# Route planning by firms

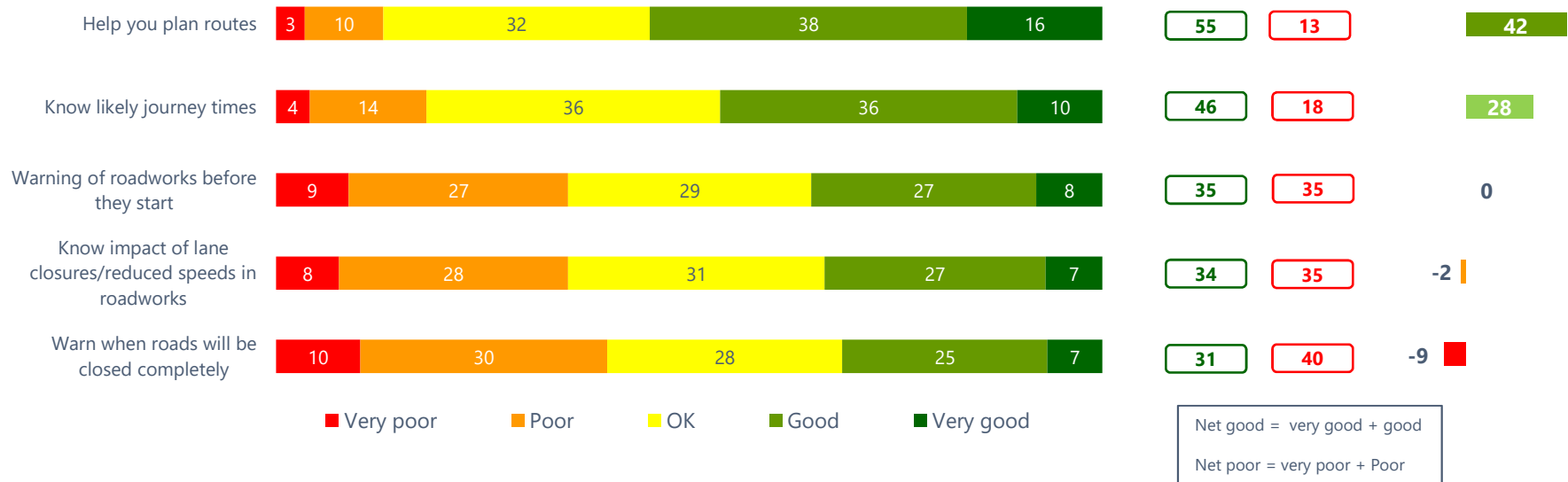
- Just over a quarter plan on the day
- Over 70% plan routes no earlier than a few days before



Q6. How far in advance do you usually organise your vehicles' routes, schedules and timings? (asked of all answering 1 to 3 at Q5)  
 Base sizes : Overall 567; Restricted 170; Standard 397.

# Rating planning information available

- Help planning routes and likely journey times rated better than other aspects
- The information that HE can particularly provide isn't net positively rated

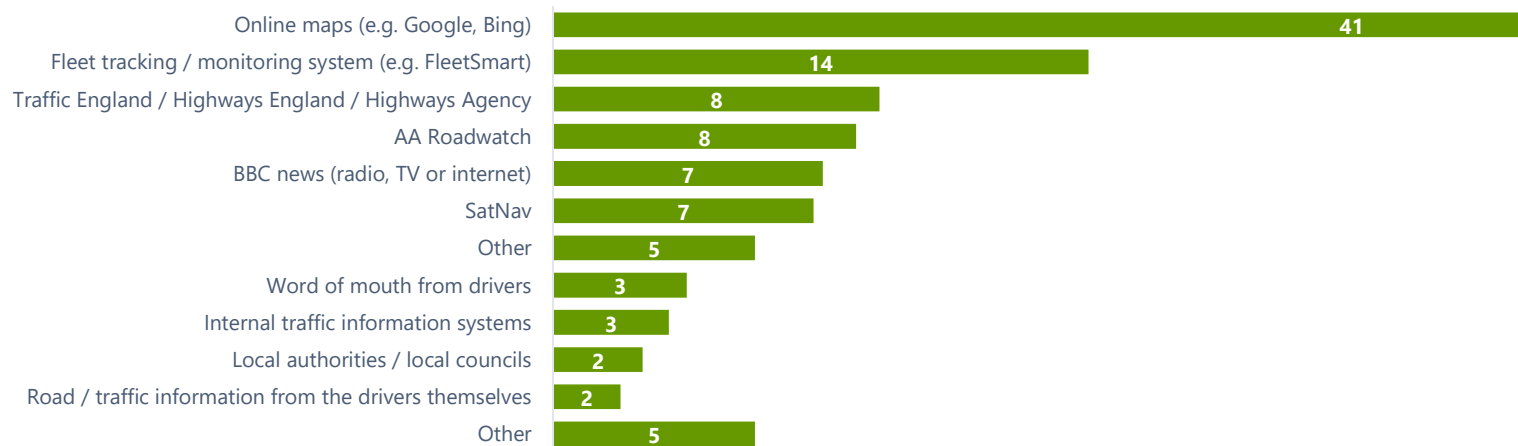


Q7. When organising routes, timings and schedules, how would you rate the availability of information to: (asked of all answering 1 to 3 at Q5)  
 Base sizes (in order): 548; 539; 548; 540; 554.

# Preferred source of information – advanced planning

- Online Maps are the biggest sources
- Fleet tracking second by a distance
- Highways England mentioned by a minority

Primary info source for advance planning

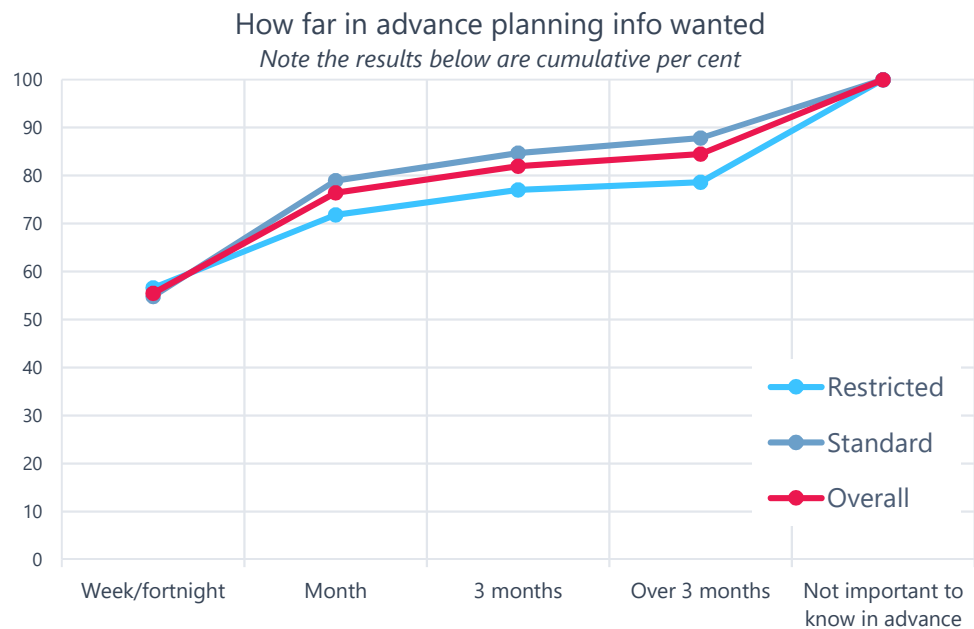


Q8. What is your most preferred source of information for planning routes, timings and schedules in advance? (asked of all answering 1 to 3 at Q5)

Base size: 342

# When advance info on roadworks wanted

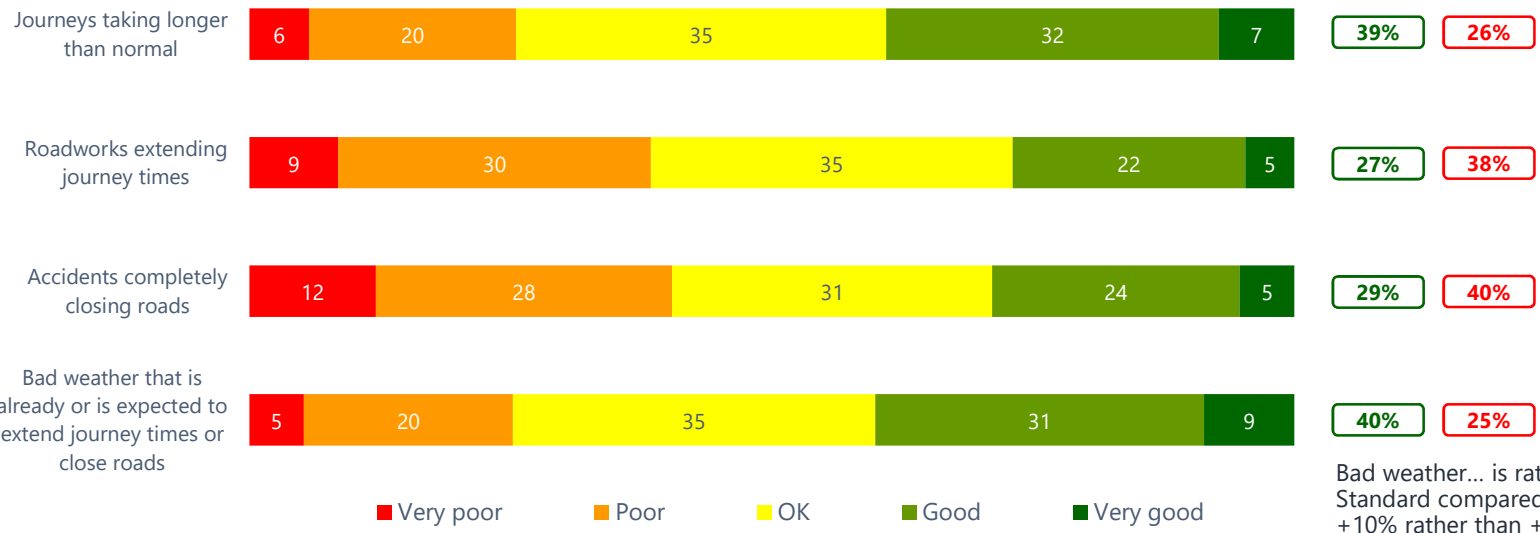
- Just over half said a week/fortnight in advance
- A further 15 to 20% said a month (accounting for most when excluding those who said “not important”)



Q11. How far in advance would it be best to get detailed information about where and when roadworks will take place?  
 Base sizes: Overall 1064; Standard 708; Restricted 356.

# Availability of information on the day

- Information on road based events felt less well communicated – net negative
- Even journeys taking longer and effects of bad weather still have a large proportion saying 'poor'



Bad weather... is rated worse by Standard compared to Restricted (net +10% rather than + 24%)

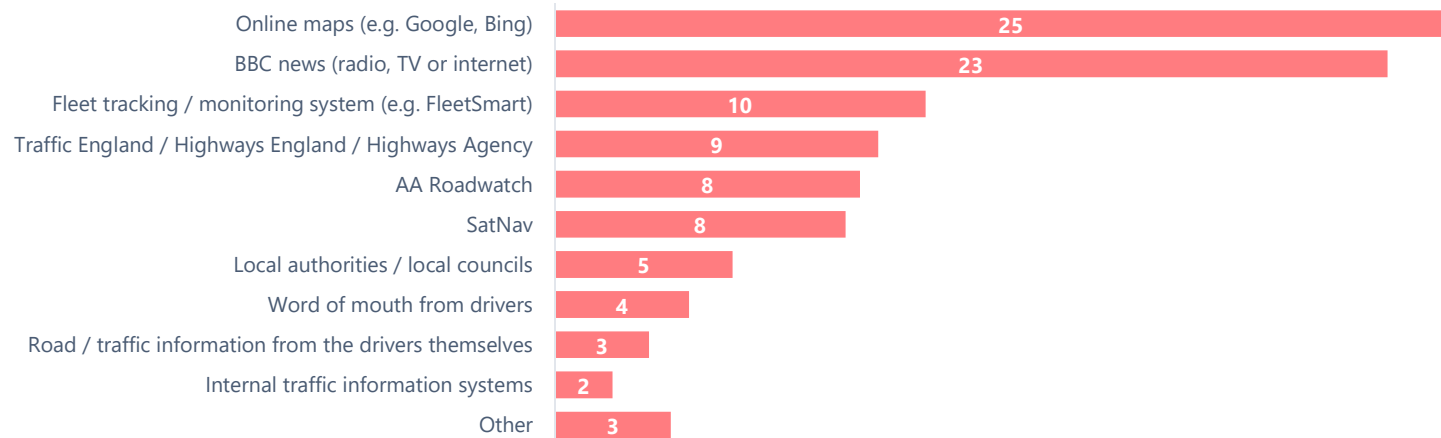
Q12. How would you rate the availability of information on the day about how traffic is flowing on these roads?  
 Base sizes (in order): 1032; 1031; 1019; 1024

Net: Good = very good + good  
 Net: Poor = very poor + poor

# Preferred source of information – on the day

- Online maps and BBC news the leading sources
- Fleet tracking, Traffic England, AA Roadwatch, and Satnav are the next group by volume

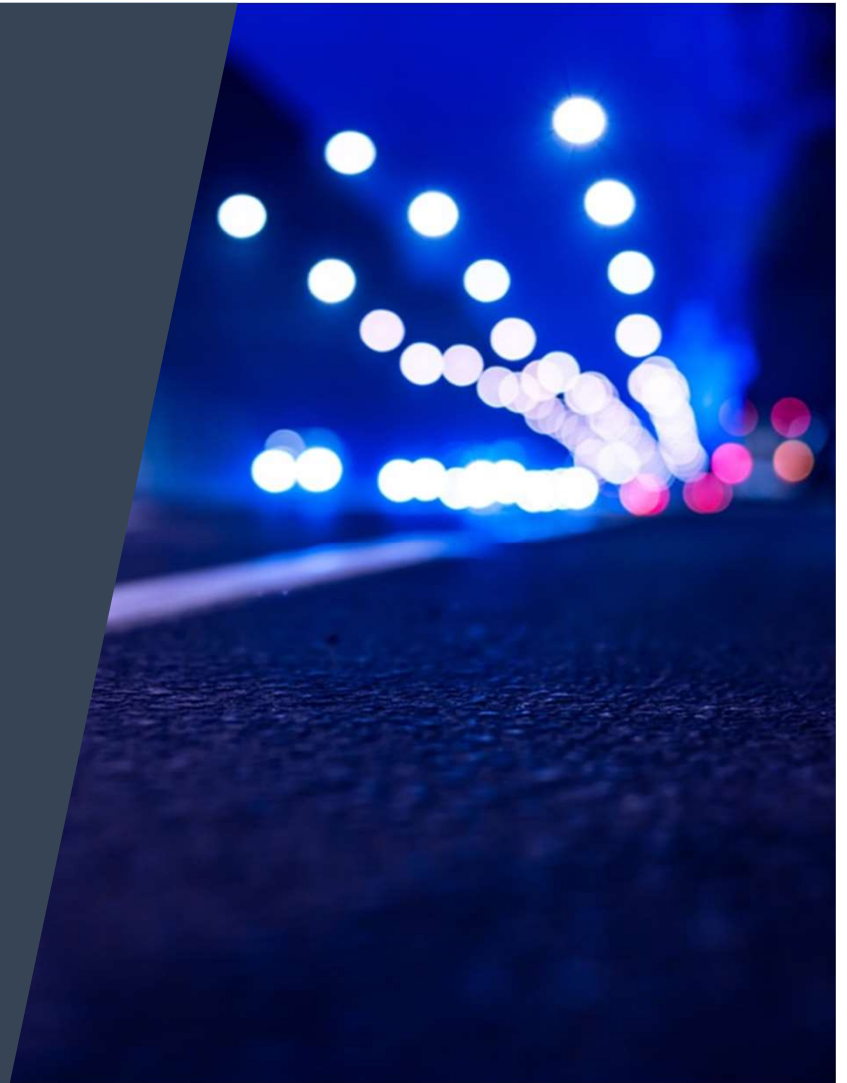
Primary source for 'on-the-day' information



Q13. What is your most preferred information source for how traffic is flowing on the day?

Base size: 995

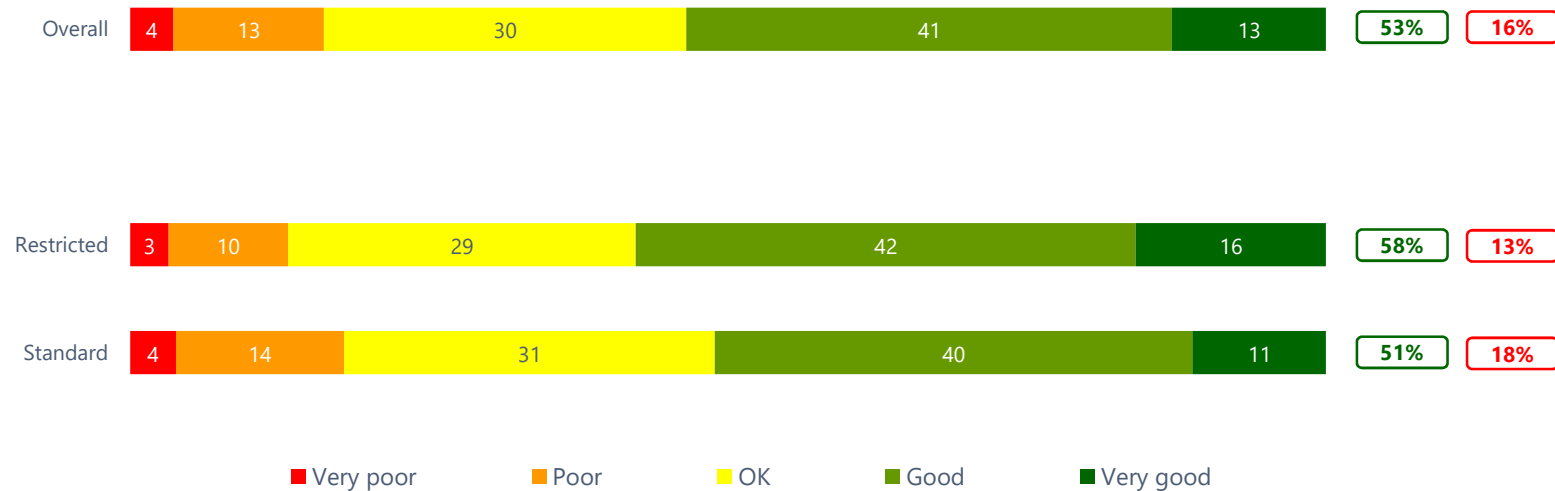
# Rating aspects of SRN





# Electronic roadside signs

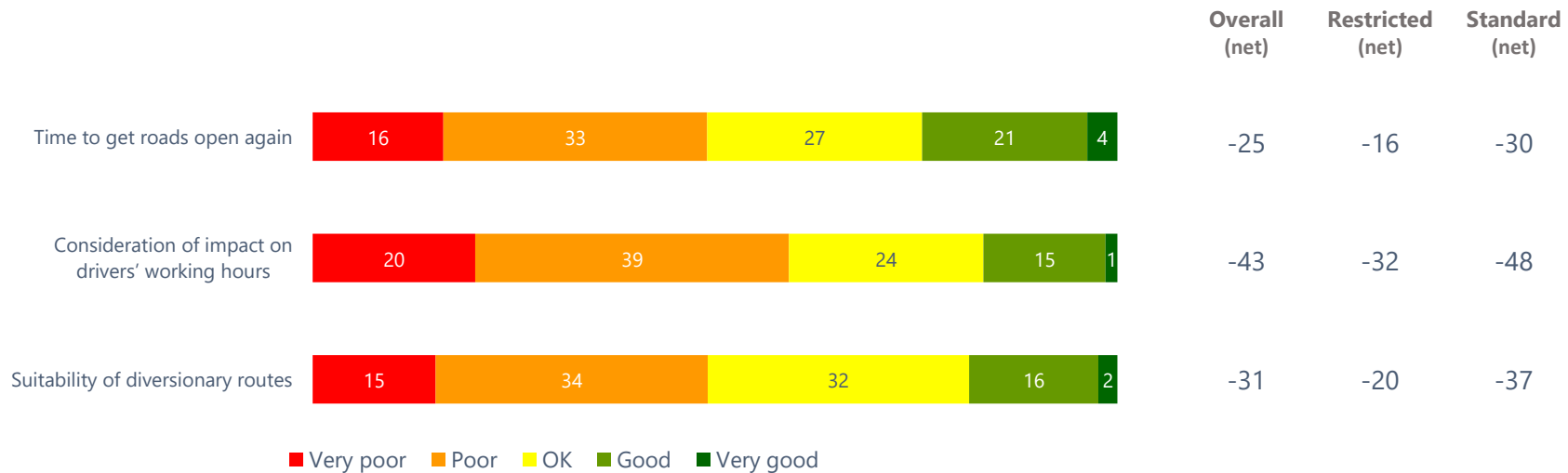
- Half rate them good for making in-the-moment decisions
- Although not a high result in itself, it is rated better than other SRN aspects



Q17.How would you rate the electronic roadside signs on motorways and major 'A' roads, to enable your drivers to make 'in the moment' decisions?  
Base sizes: Overall 1,061; Restricted 355; Standard 706.

# Accident/incident management

- Considering drivers' working hours rated the most poorly
- Time to get roads open and suitability of diversions not far behind
- These aspects are rated worse by standard licensees



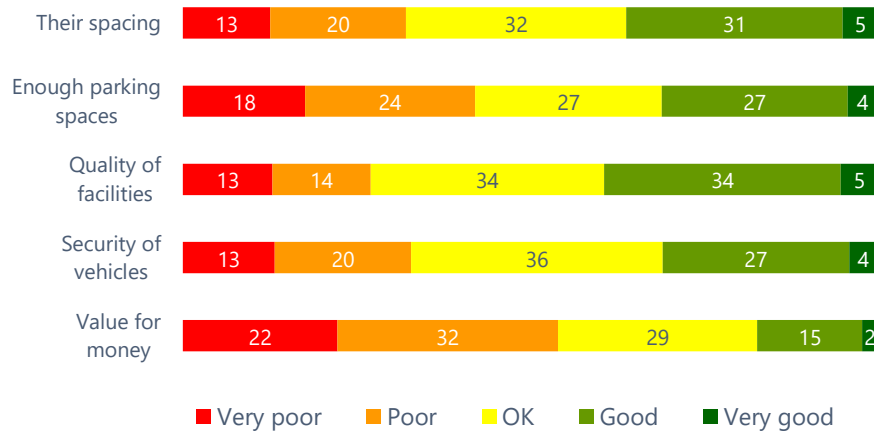
Net = good minus poor

Q18. How would you rate the following, in relation to accidents and incidents on motorways and major 'A' roads?  
 Base sizes (in order): 1043, 1010, 1046.

# Roadside service facilities

- VFM rated lowest, and enough spaces second lowest
- VFM is rated lower by Standard licensees, better by Restricted – but low VFM consistent

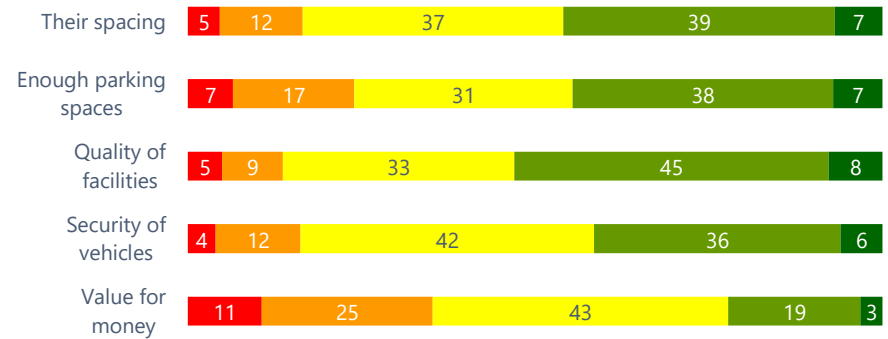
### Overall



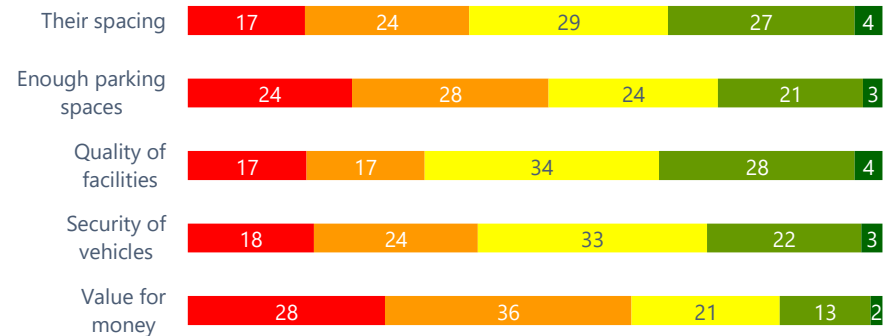
Q19. Thinking about roadside service facilities on these roads, please rate the following:

Base sizes (in order): Overall 1006; 1011; 990; 972; 990; Restricted 327; 331; 317; 314; 317; and Standard 679; 680; 673; 658; 673.

### Restricted

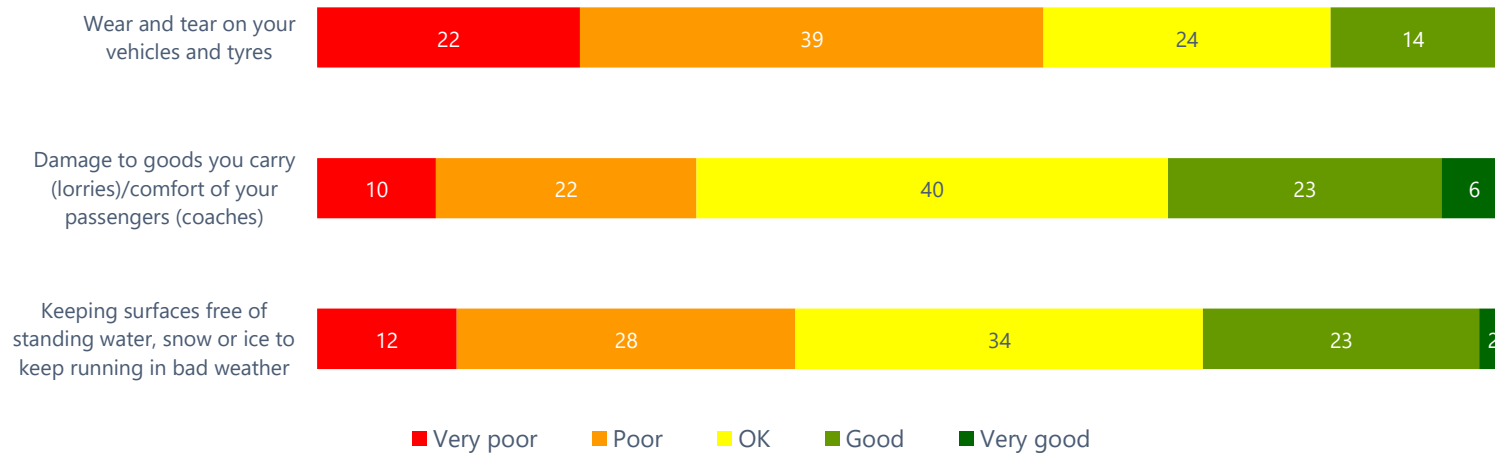


### Standard



# Road surface conditions

- Very poor rating for impact of surfaces on wear and tear
- Other two factors not rated well either



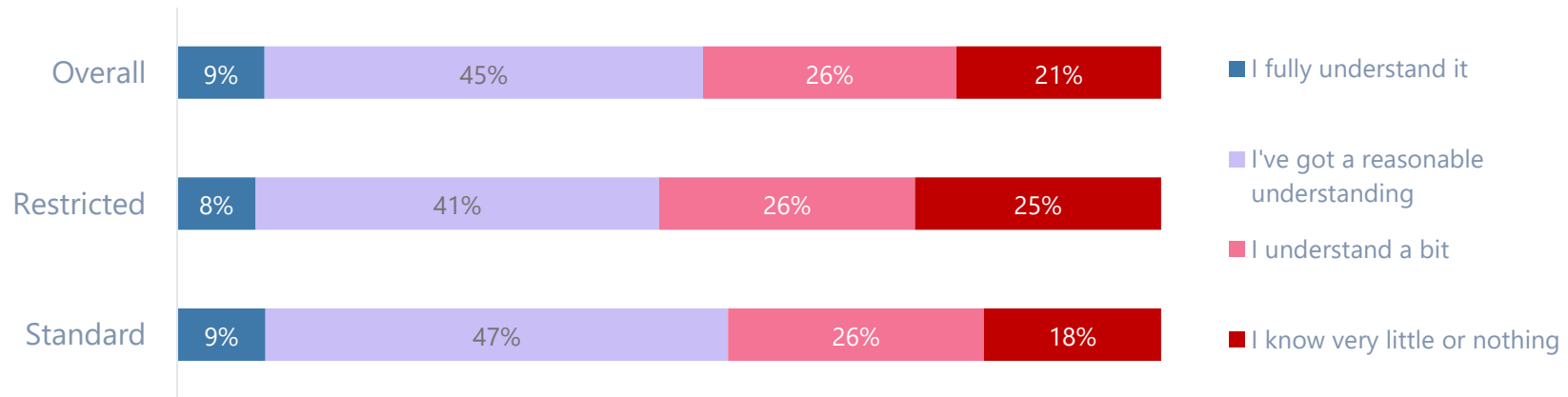
Q20. Thinking about the condition of these roads, how would you rate the following?  
Base sizes (in order): 1,062, 998, 1052.

# Rating Highways England's network management



# Awareness of Highways England's role

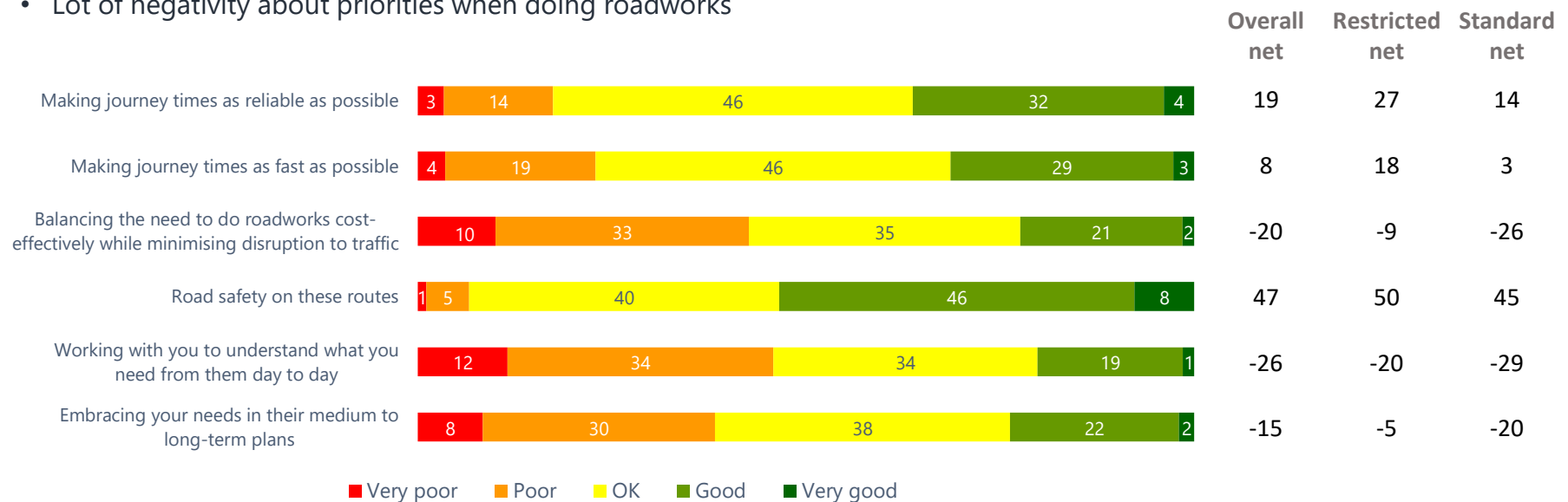
- Around half have at least a reasonable understanding of HE role
- Around a fifth have hardly any knowledge of HE role
- Those on standard licences very slightly more aware



Q21.How much do you know about their role?  
 Base sizes: Overall 1062; Restricted 355; Standard 707.

# Ratings on HE meeting needs of sector

- Safety rated best; half think good, very few rate this negatively
- The firms in this sector do not think HE considers their needs
- Lot of negativity about priorities when doing roadworks



Net = good minus poor

Q22. Please rate how you feel Highways England manages the motorways and major 'A' roads to meet the needs of your business in terms of:  
 Base sizes (in order and overall/restricted/standard): 1050, 350, 700; 1038, 346, 692; 1045, 347, 698; 1050, 349, 701; 1015, 328, 687; 1016, 335, 681.

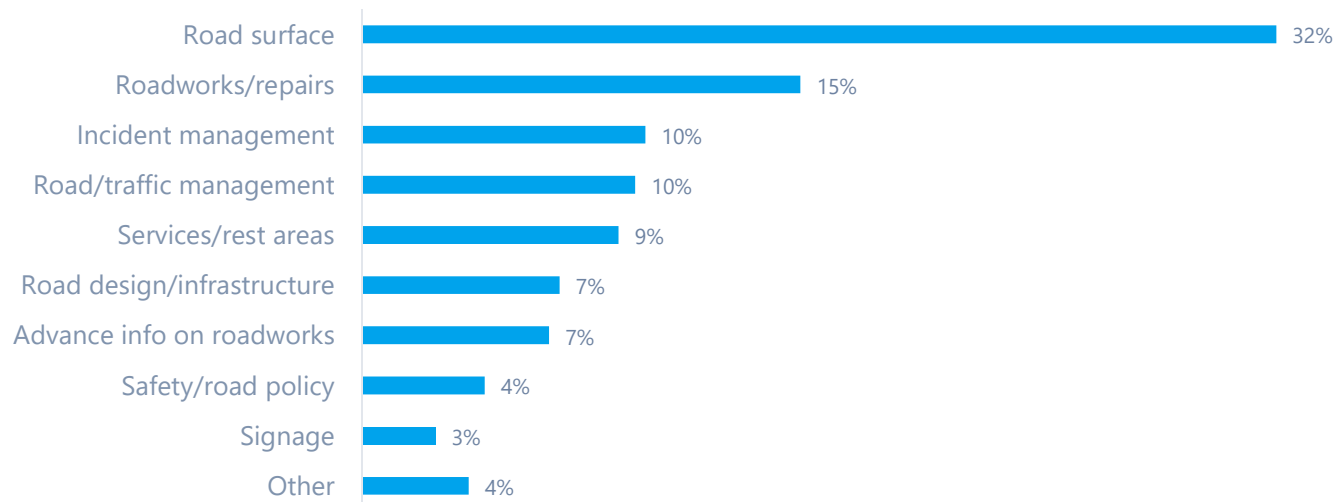
What drives satisfaction /  
improvements





# Improvements the sector says it wants

- Surface quality and roadworks/repairs are two improvements users mention



Note respondents could mention more than one improvement

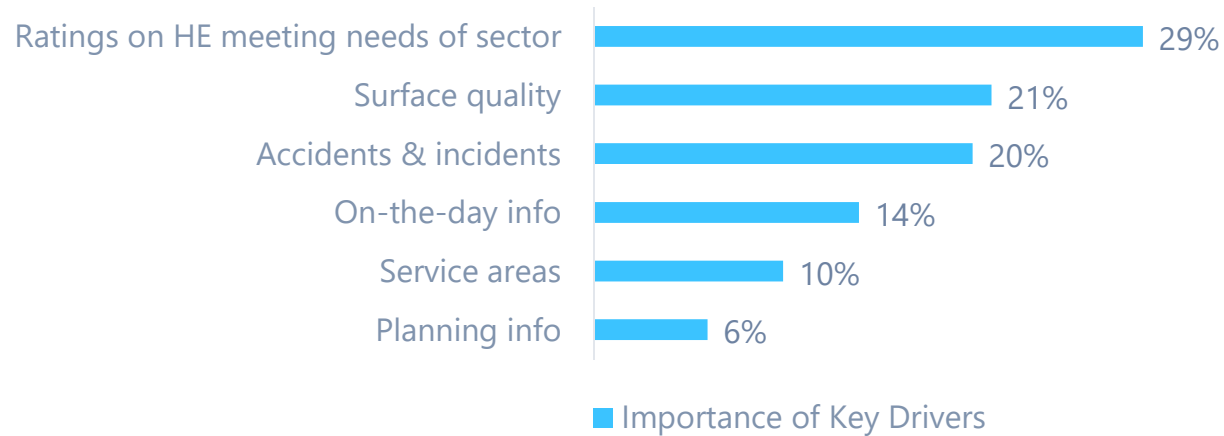
Q23. What is the one thing you would most like to see improved on motorways and major 'A' roads?

Base size: all mentions of improvements (1067).

NB: Don't know and 'no response' removed.

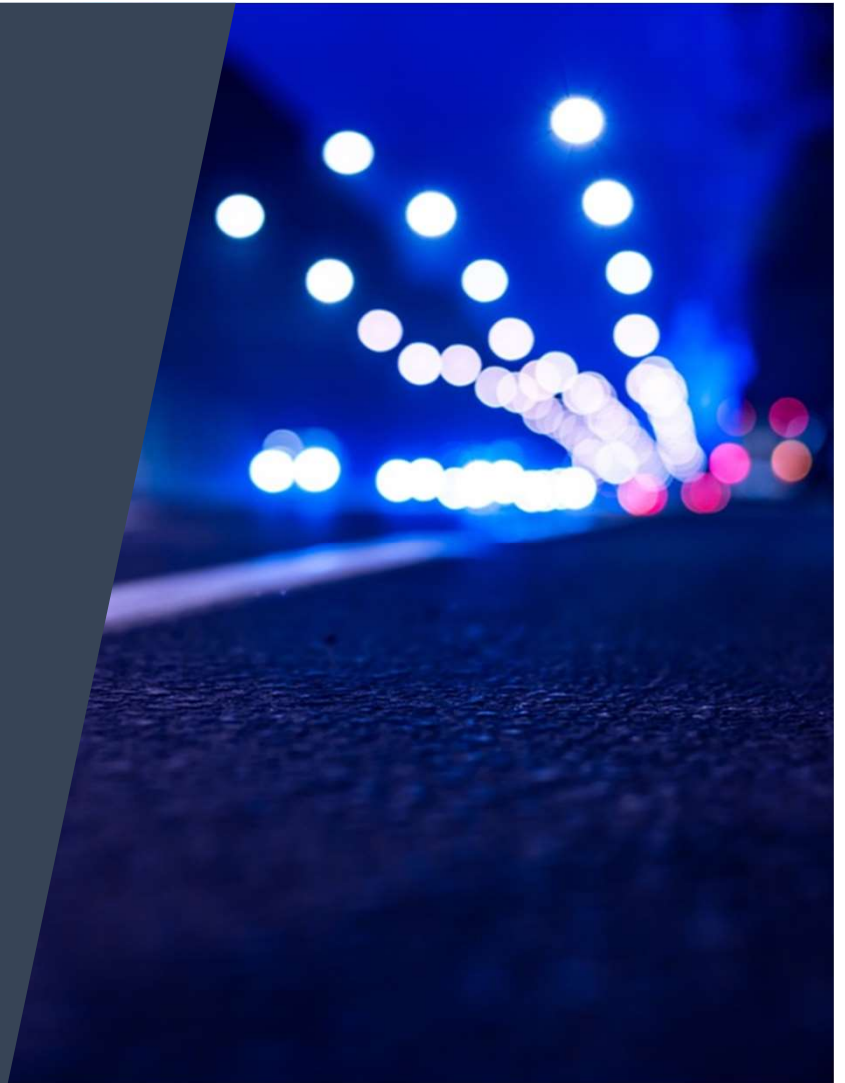
# Level of influence (statistical) by questionnaire topics

- Ratings on HE meeting needs of sector highest topic group
- Road surfaces and incident management next



Adjusted r-squared = 25%

# Summary



# Overall Summary

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Overall satisfaction (although 50%) is not high and coupled with appreciable dissatisfaction

The sector doesn't feel Highways England much consider them either day to day or in strategic plans

HE has some presence as the go-to place for information

Specific things rated low

- Incident management and time to clear
- Impact road surfaces on wear and tear of vehicles
- Services – VFM / parking availability / vehicle security

A blurred blue truck is shown in motion, moving from left to right across the frame. The truck is the central focus, with its details softened by motion blur. The background is a clear, bright blue sky. A semi-transparent white rectangular box is overlaid on the left side of the image, containing the text "Thank you...".

Thank you...