

Road Use Survey

July 2010



RAC
Foundation

Background

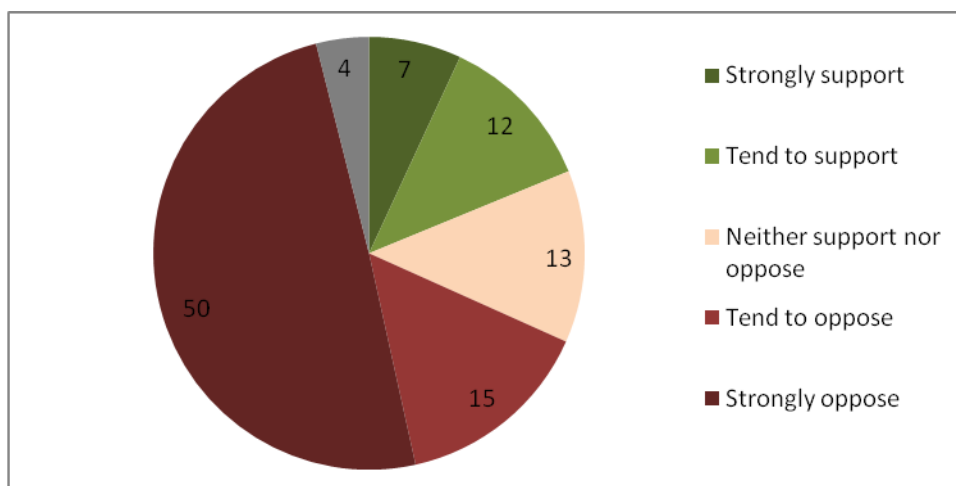
The RAC Foundation commissioned Ipsos MORI to survey 1,005 British adults aged 16+ by telephone between 25 and 27 June 2010 on the subject of road use.

The data from which this briefing note is drawn is weighted to match the profile of the population by age, gender, work status, social grade, region and car in household. The survey results are subject to sampling tolerances – for example, +3 percentage points for a 50% finding based on a 1,000 sample size (at the 95% confidence level).

Results

When road users are first presented with the concept of a Pay as You Go, pay-per-mile system for road use on Britain’s motorways and major road network, support is low – 19% support versus 65% opposition (see Figure 1)

Figure 1: Support for a Pay as You Go, pay-per-mile system of road use on Britain’s motorways and major roads



However, when a Pay as You Go system is presented alongside a potential package of measures that it might include, support increases markedly (see Figures 2 and 3).

Figure 2: Support for a Pay as You Go, pay-per-mile system of road use on Britain’s motorways and major roads which includes abolishing the road tax disc, reducing fuel duty and compensating for delays¹

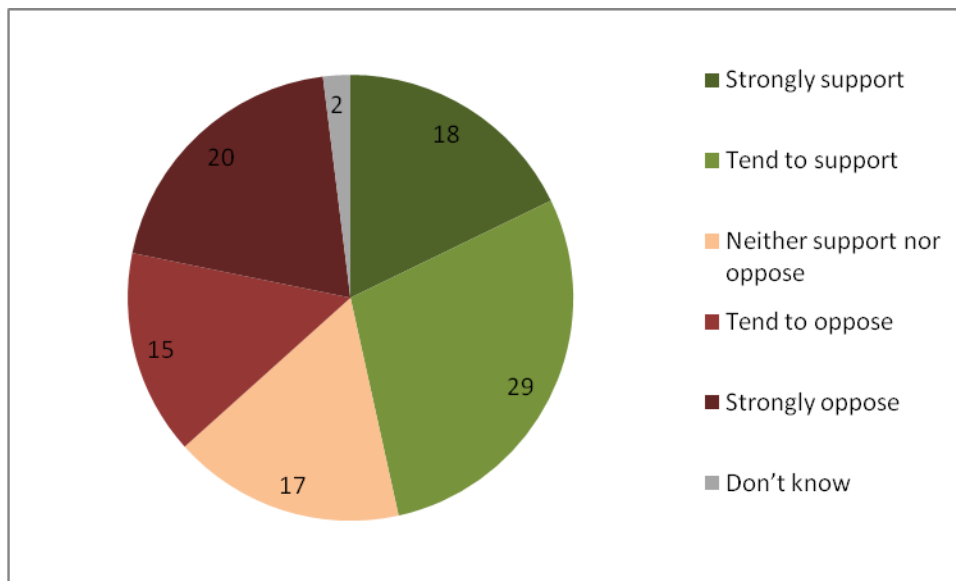
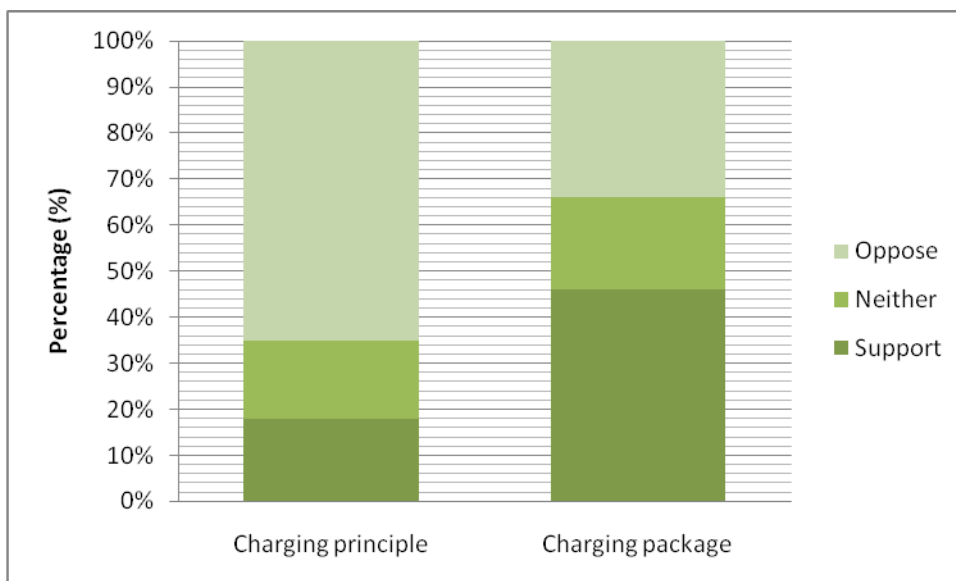


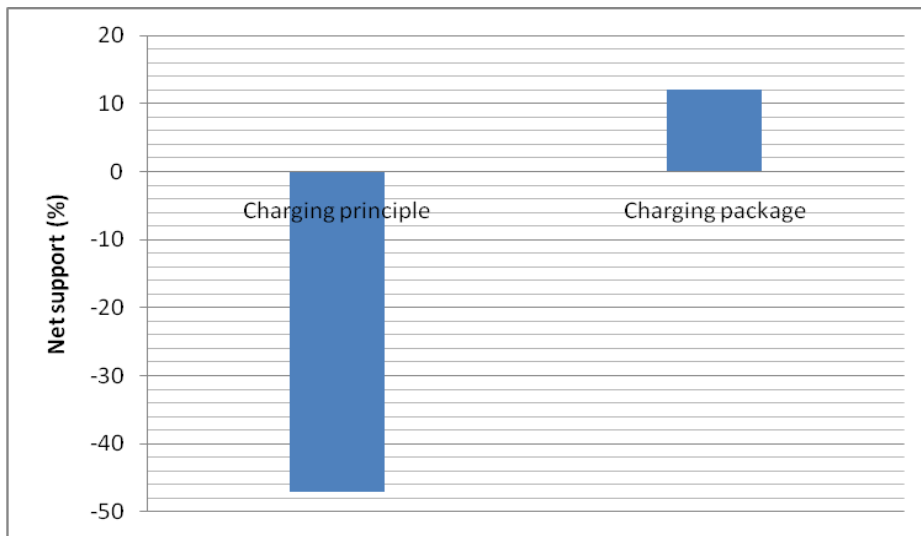
Figure 3: Difference in support for the principle versus the package of charging Pay as You Go on motorways and main roads



Net support² for the initiative increases from -47% to +12% (see Figure 4) illustrating that once a package is explained opinion can be changed markedly from majority opposition to a level of support.

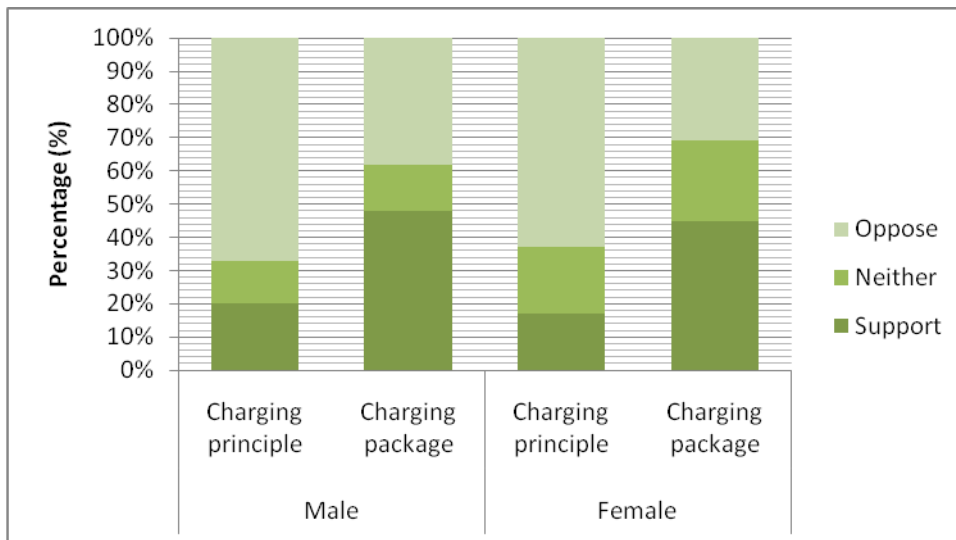
¹ In public statements the RAC Foundation has said 46% of people strongly support or tend to support the proposition posed in this question. This is based on an aggregation of the original survey data which extends to two decimal places. However, because the figures in the diagram above have been rounded for ease of reading, they add up to 47%.

Figure 4: Net support for pay per use charging on the motorways in principle versus an overall charging package



Overall support for the initiative, and change in support when further information is revealed does not differ markedly by gender, having a car in the household or number of cars (see Figures 5–7)

Figure 5: Support / opposition for initiative options by gender



² Net support calculated as follows: (% strongly support + % tend to support) – (% strongly oppose – % tend to oppose)

Figure 6: Support / opposition for initiative options by car ownership (car in household)

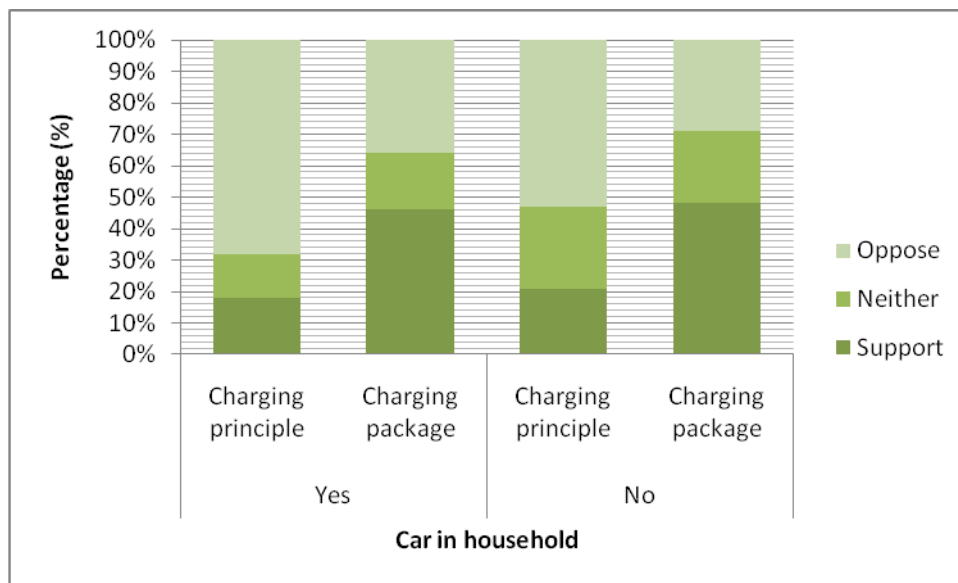
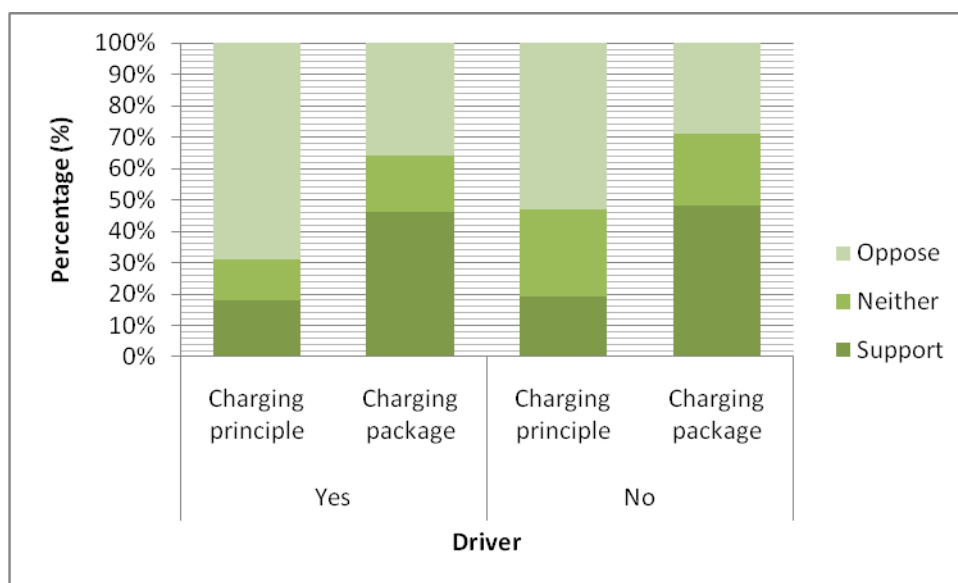


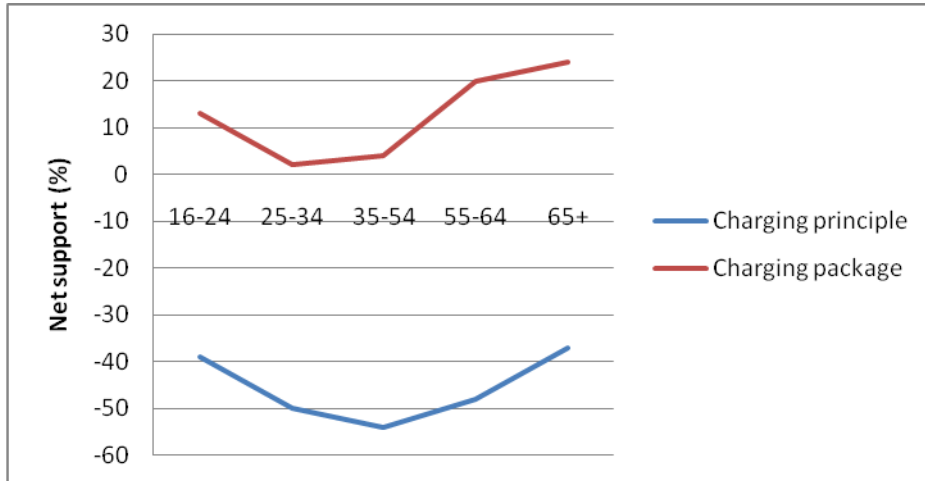
Figure 7: Support / opposition for initiative options by driving status (Car/van driver)



Generally speaking women are more likely to neither support or oppose the initiative in comparison to men, making them less likely to support or oppose the idea of Pay as You Go charging on the motorways and major roads. Those with a car in the household (or drivers) are more likely to oppose the scheme than those without a car, and those without a car give a higher number of neither support or oppose answers.

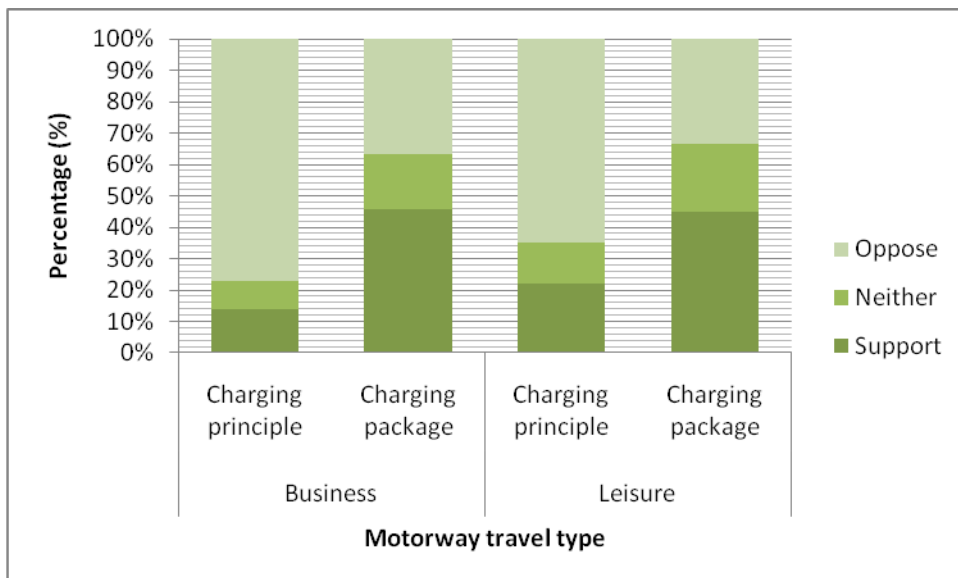
Support for the concept does however appear to differ with age (see Figure 8). Opposition to the principle of charging is high for all groups (particularly for the 35–54 range). This is converted into a net support for all age groups once the package is explained. Support is lowest amongst the 25–54 age group (working age), and highest amongst younger people and those nearing retirement.

Figure 8: Net support for Pay as You Go initiatives on the motorway and main roads



Understandably there is greater opposition to the scheme, in whatever form, from those who are travelling for business rather than those who travel for leisure (see Figure 9).

Figure 9: Support / opposition for initiative options by motorway travel type



There is also some difference in attitude to the scheme based on individuals' social status. Support is generally lower amongst those on lower incomes, possibly due to disposable income concerns (see Figure 10), but it is those in the middle income range whose views shift most positively once the package is explained (see Figure 11).

Figure 10: Net support for initiatives on the motorway and main road network by social grade

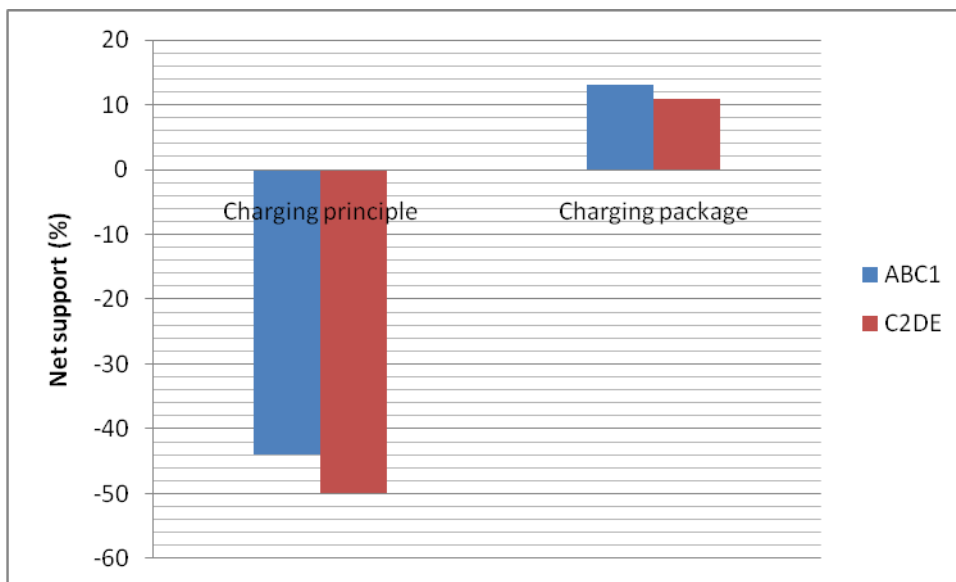
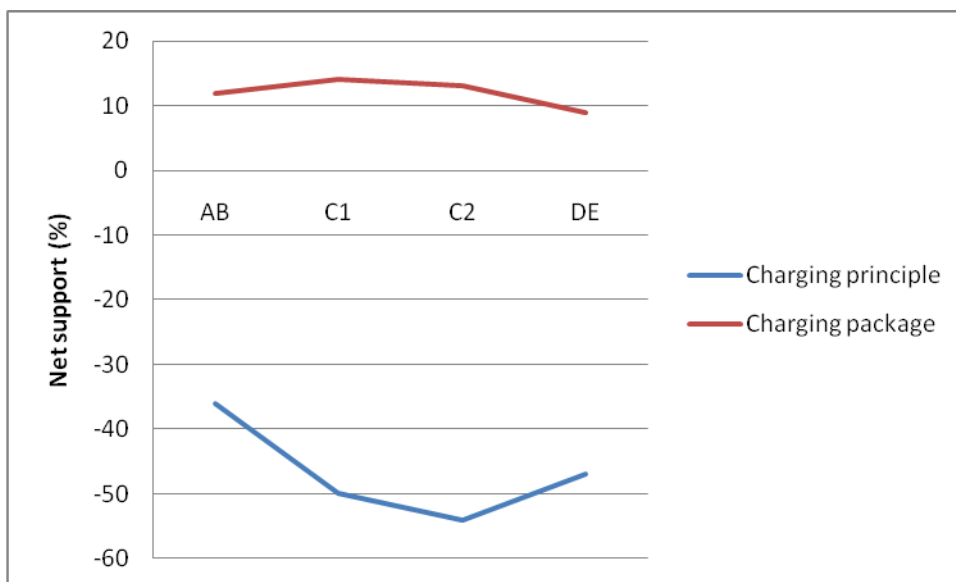
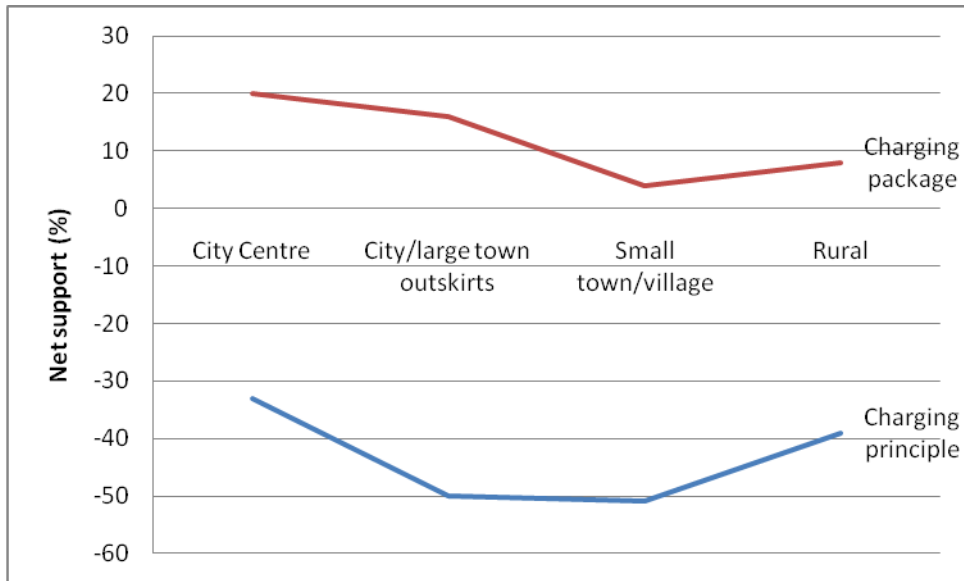


Figure 11: Net support for initiative options by social grade



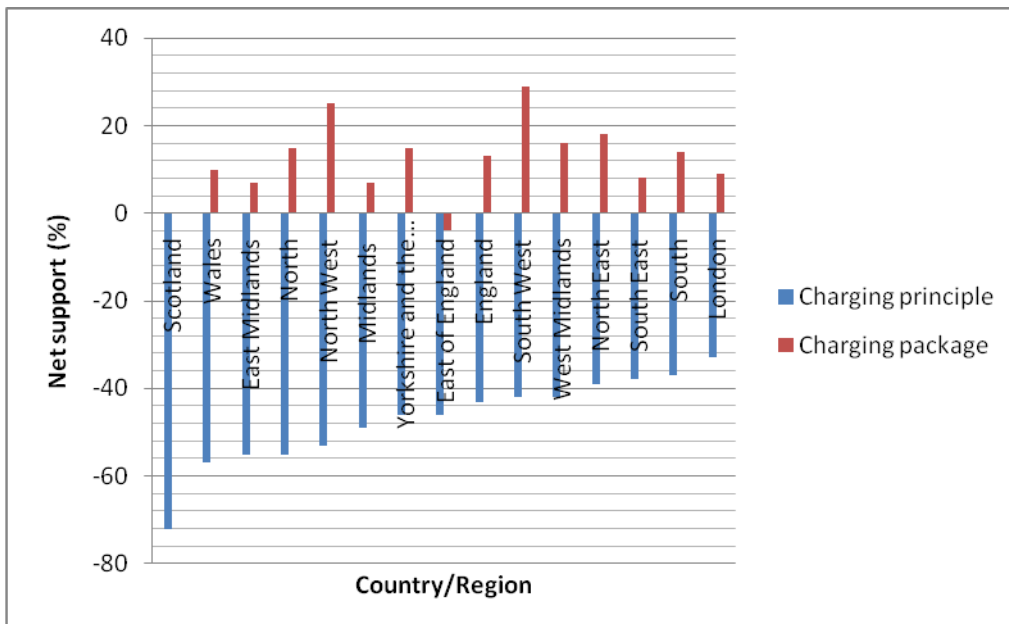
Support also varies by geographical area. Before the package is detailed support is highest in city centre and rural locations. After the package is explained support is higher across the board, but there is less support from the more rural locations, possible because they feel that they need to rely on the motorway and main road network more heavily.

Figure 12: Net support for initiative based on home area



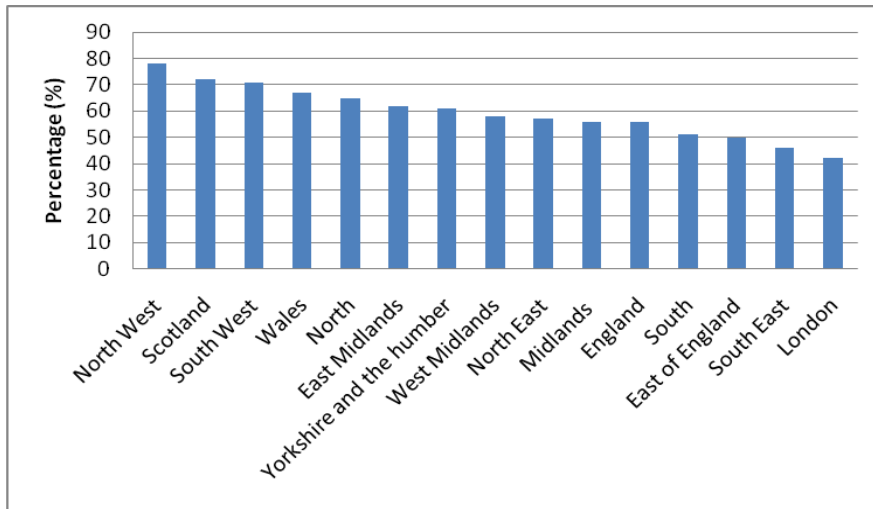
Net support for the principle and a defined package also vary by region (see Figure 13). The concept of charging, in whatever form, is least popular in Scotland. While Londoners are most receptive to the principle of charging, support for the charging package is highest in the South West, which might be a reflection of the delays frequently experienced in this part of the country.

Figure 13: Net support for the charging options by region



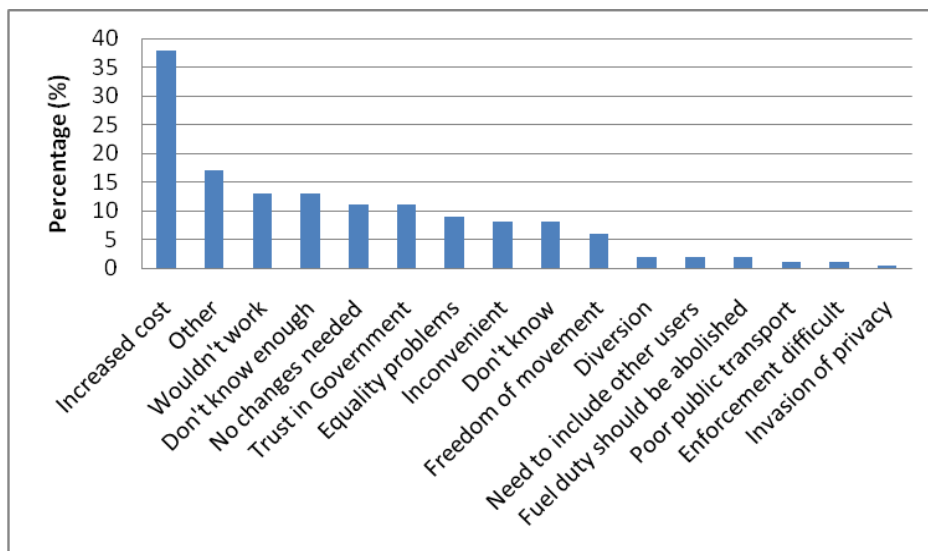
The greatest swings in views between the charging principle and the charging package can be found in Scotland, the North West, South West and Wales (see Figure 14). London has the least change, possibly because the area already has experiences of charging.

Figure 14: Percentage point difference by country/region in net support for Pay as You Go before and after the package is explained in more detail



When asked why they opposed, or neither supported or opposed, Pay as You Go charging, people’s largest concern was about increased cost (see Figure 15). The idea that such a scheme would not work, or that people did not know enough about it were also near the top of the list. Issues such as concerns about freedom of movement and enforcement featured nearer the bottom of the list, while concerns about an invasion of privacy was mention by less than 1% of the respondents. Many of the most commonly mentioned concerns indicate that people might be encouraged to support the scheme given more information.

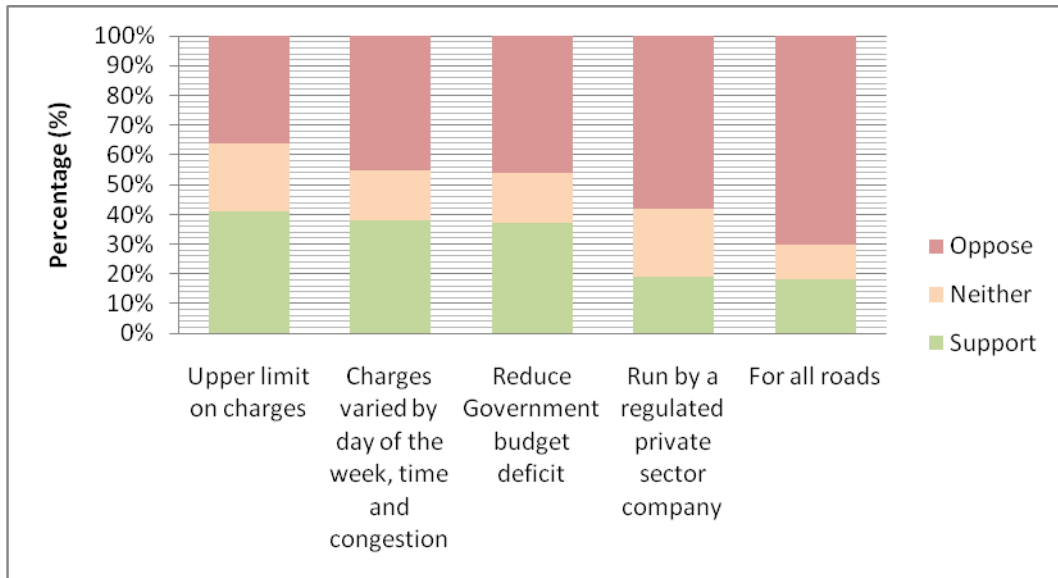
Figure 15: Reasons for opposing, or neither support nor oppose, a Pay as You Go proposal³



³ Figures do not add up to 100% as more than one answer was given.

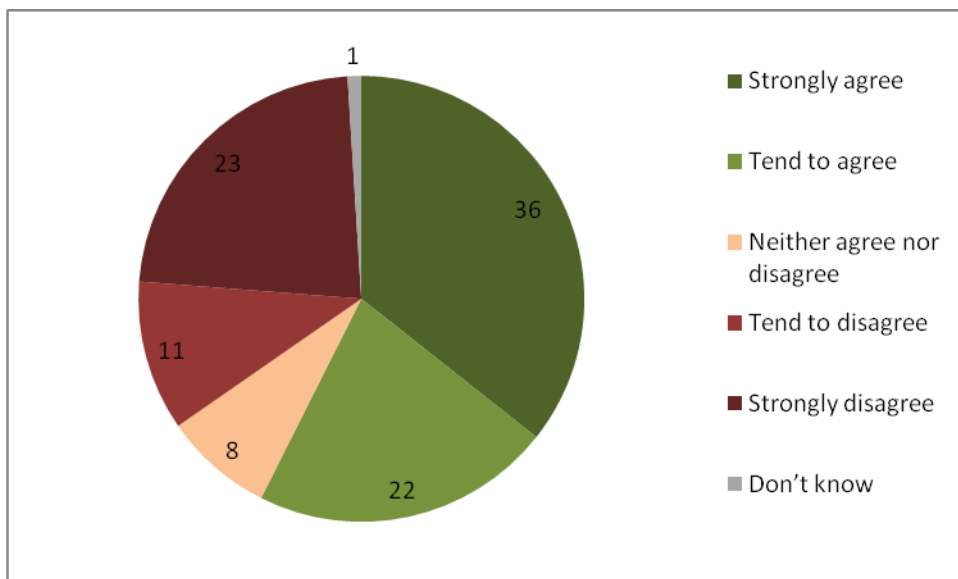
When other factors were introduced into the package the most supported factors was a limit on upper charges (41%), and charges that vary according to the time of day (38%) (see Figure 16). Road user charging on all roads, and a system run by a regulated private business received lower levels of support. It therefore appears that a charging system for motorways and major roads only is currently the most acceptable road charging proposition.

Figure 16: Support / opposition for Pay as You Go road charging with the following introduced



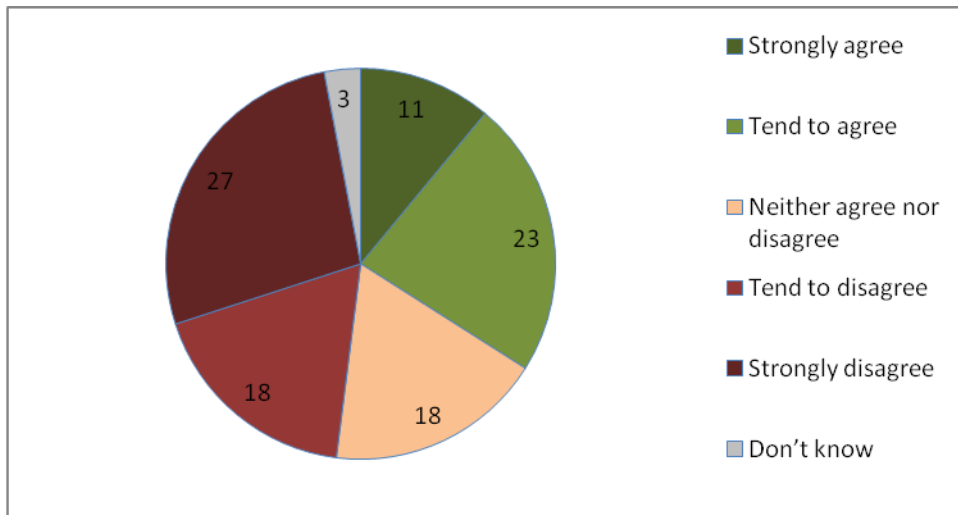
Drivers were asked, regardless of their support for a Pay as You Go system, whether they thought its introduction would make them think about the amount they drive. 58% of drivers said that it would have an impact on the amount they drive.

Figure 17: Agreement with ‘The introduction of a Pay as You Go system on Britain's roads would make you think more about how much you drive?’



34% of drivers consider it to be inevitable that a Pay as You Go system will be introduced in the UK, but overall net agreement with this statement is -11%.

Figure 18: Agreement / disagreement with the statement ‘It is inevitable that charging car and van drivers through a Pay as You Go system will be introduced on Britain’s roads in the future’



Demographics

Figure D1: Gender

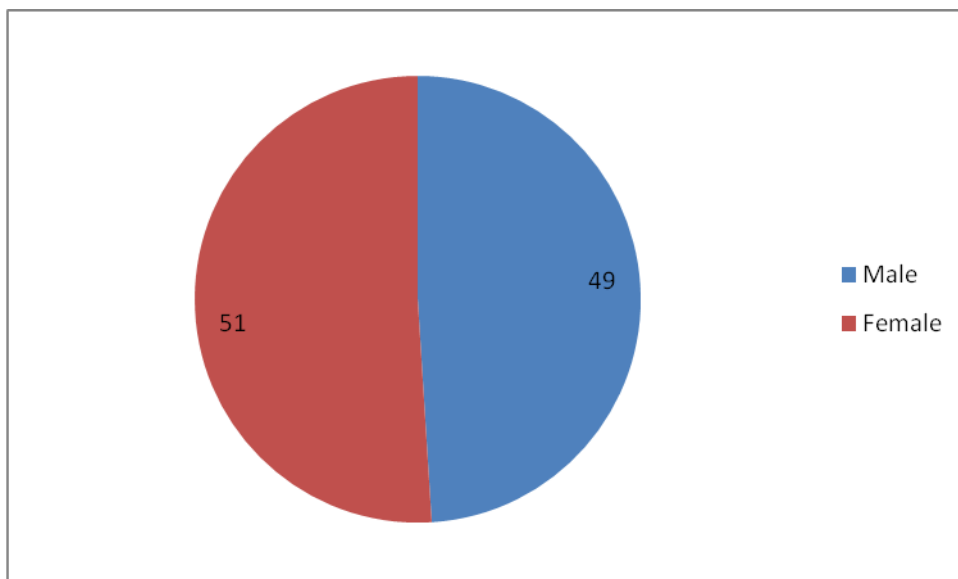


Figure D2: Age

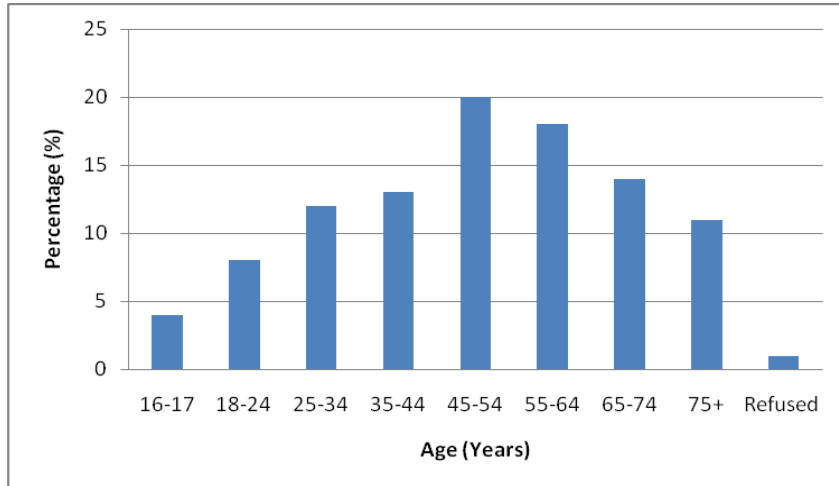


Figure D3: Current work status

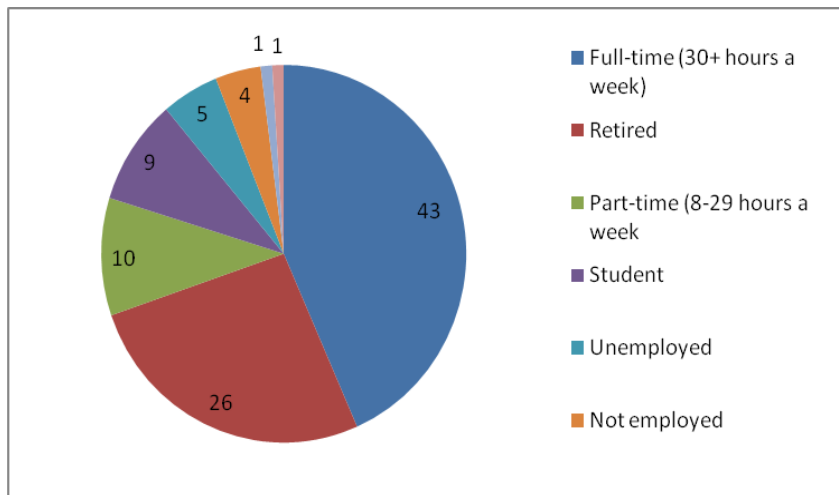


Figure D4: Cars by household

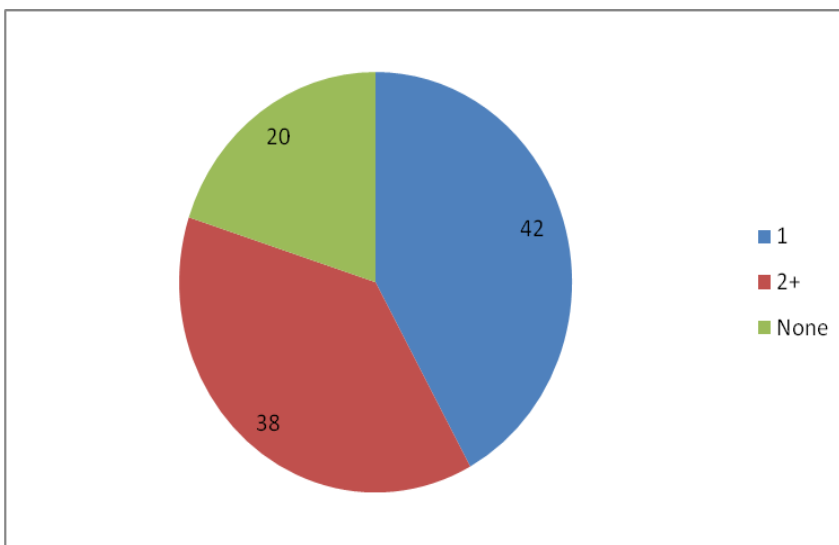


Figure D5: Residential location

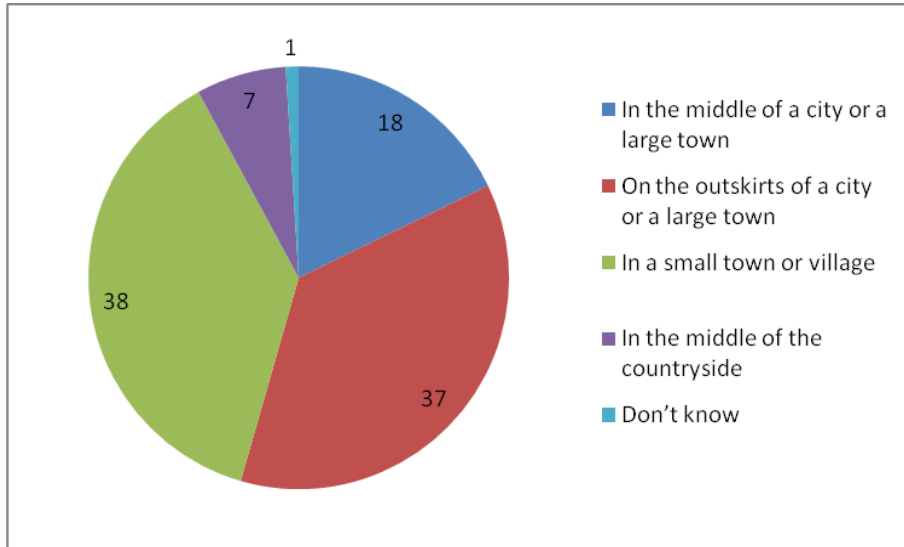


Figure D6: Social grade

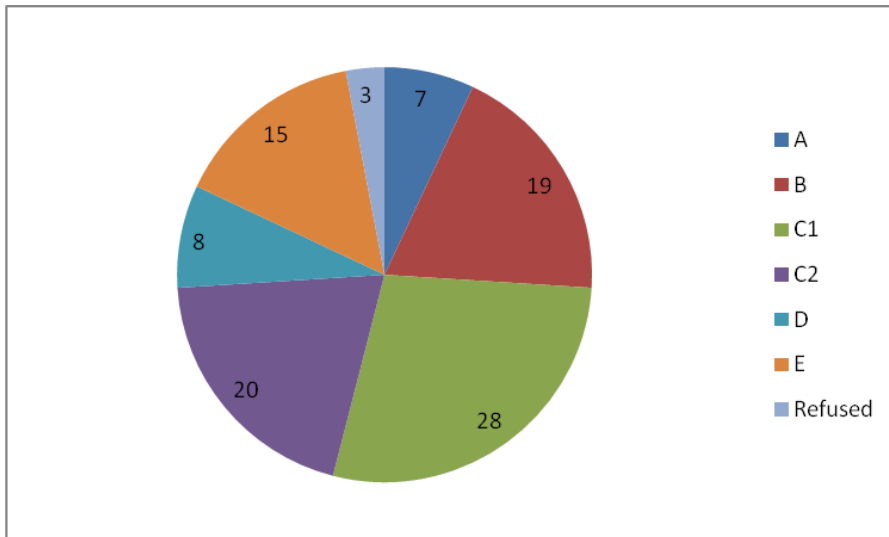


Figure D7: Region of respondents



Annex A – Survey Questions

Q1. To what extent would you support or oppose the introduction of a “pay as you go” system in which car and van drivers pay to use Britain’s motorways and major roads based on the distance they travel, that is a charge per mile? Would you...this?

Strongly support
Tend to support
Neither support nor oppose
Tend to oppose
Strongly oppose
Don’t know

Q2. There have been a number of different proposals for a “pay as you go” system on Britain’s roads. I am going to read out the details of one of these.

Car and van drivers would be charged to use Britain’s motorways and major roads, that is there would be a charge per mile. At the same time, road tax, the ‘tax disc’, would be abolished, fuel duty, that is tax on petrol and diesel, would be reduced, some of the money raised by this scheme would be used to improve roads, and compensation would be paid to drivers who are delayed.

Overall, to what extent would you support or oppose this proposal? Would you...this?

Strongly support
Tend to support
Neither support nor oppose
Tend to oppose
Strongly oppose
Don’t know

Q3. Why do you say that you would oppose, or neither support nor oppose, such a “pay as you go” proposal? And for what other reasons?

Q4. To what extent would you support or oppose the introduction of such a “pay as you go” proposal...?

...if some of the money raised was used to help the Government reduce the UK's budget deficit

...if a regulated private sector company ran the system

...if an upper limit was put on how much drivers would be charged

...if it were extended to all types of roads across Britain, not just motorways and major roads

...if the charge varied according to the day of the week or time of day depending on congestion

Strongly support

Tend to support

Neither support nor oppose

Tend to oppose

Strongly oppose

Don't know

Q5. Can I just check, how often, if at all, do you....

a) drive a car or van?

b) drive a car or van on a motorway or major road?

Every day

More than twice a week, but not every day

Once or twice a week

Less than once a week but more than twice a month

Once or twice a month

Less than once a month but more than twice a year

Once or twice a year

Less than once a year

Never

Don't know

Q6. Thinking about the last six months or so, what would you say is the most common reason that you have driven a car on motorways and major roads? Is it....

...travelling to or from work

...travelling for business/in course of work

...leisure (for socialising/holiday/day trips)

...personal trips (to go shopping, visit doctor, take children to school)

Other

Don't know

Q7. To what extent do you agree or disagree with the following statement...

The introduction of a “pay as you go” system on Britain’s roads would make you think more about how much you drive?

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don’t know

Q8. And to what extent do you agree or disagree with this statement...

It is inevitable that charging car and van drivers through a “pay as you go” system will be introduced on Britain’s roads in the future

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don’t know