

Note on the Ipsos MORI Road User Charging Survey

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Key findings

Two out of three adults drive cars or vans on the nation's motorway network.

Wealthier people use motorways most, with those in households with incomes over £55k/year four times more likely to drive on motorways than those from households with incomes under £15k/year.

Leisure is the most frequent reason for motorway use followed by travel to/from work, business and personal trips.

People from the North West and Scotland use motorways most, while people from London and the east of England use them the least. Rural dwellers are somewhat more likely to use motorways than people who live in large towns and cities.

Thirty-two percent think too little is spent on building new motorways, 38% think too little is spent on improving the existing system (for example, by adding extra lanes) and 39% believe too little is spent on motorway maintenance.

While 38% of people think paying for using motorways in relation to how often they make journeys on them (pay-by-use, PBU) would be fair, only 22% support the introduction of such a scheme.

Only 6% of people trust the Government to spend additional money raised from PBU charging on motorways alone.

When asked about a PBU scheme in which motorway users would pay £100/year or £5–£10/journey, support varied widely according to what was proposed to compensate users and provide safeguards on the use of the proceeds, specifically:

- a tax disk cost reduced for all drivers attracted support from 52% of respondents;
- fuel duty reduced for all drivers attracted support from 60% of respondents;
- if every PBU £ raised was matched by a price reduction in tax disk/fuel duty for all drivers, 49% of respondents were supportive;
- if there was an overall increase in spending on motorways, 37% of respondents were supportive;
- if the extra money was spent on motorways alone, this increased to 40%;
- 49% would support a PBU scheme if an independent watchdog was set up to protect motorists' interests and ensure money was spent as promised; and
- if a regulated private company were created to decide how to spend PBU monies, only 13% were supportive.
- Respondents with experience of autoroute driving are more likely to support a PBU scheme for Britain's motorways than those who have not driven on an autoroute (54% compared with 51%).

Introduction

The purpose of the road user charging survey was to explore attitudes to charging motorists directly to use the national motorway system. It canvassed the views of just over 2,000 British adults (aged 16–75), of which 80% lived in car/van-owning households – about the national average. The survey was undertaken online between 10 and 16 May 2013.

The sample was categorised by gender, age, employment status, region, settlement type (urban/rural) and income, and data was weighted to reflect the known population. While van use was included, commercial vehicle drivers as such were not. Goods traffic comprises 11.3% of travel on the national motorway network.

Car ownership

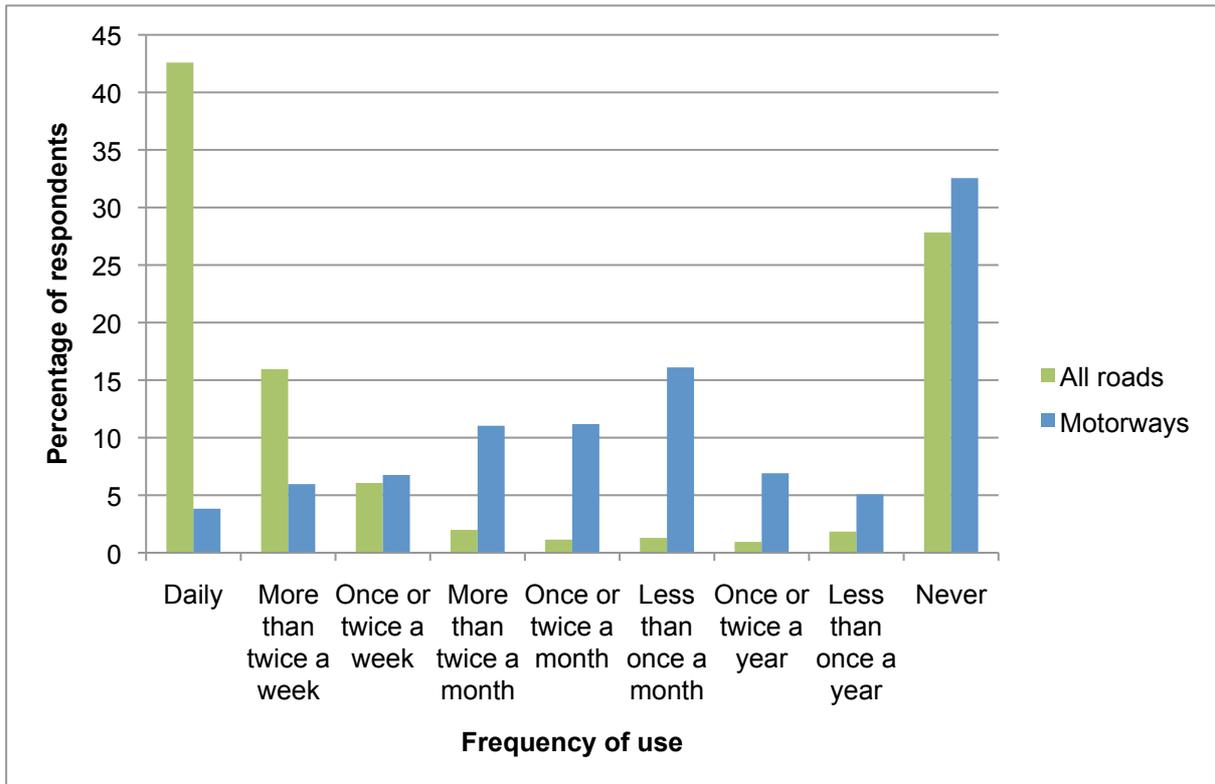
Car ownership was found to be distributed as expected from the National Travel Survey, with men aged 35–44 and workers more likely to live in households owning a car. Car ownership was found to be above average in high-income households. The most powerful discriminator was income: poorer regions tended to have lower car ownership, but rural areas had above average car ownership. As expected, London stood out with well below average car ownership and use.

Driving on ordinary roads and motorways

The likelihood of driving on all roads increases with car ownership levels, with adults in single car-owning families 4.8 times more likely to drive than not, compared with 9.7 times more likely in households with three cars or more. Similarly, 44% of adults in single car-owning families drive on a daily basis compared with 70% of adults in households with three cars or more.

Driving on motorways is less common, with only 19% of all car traffic and 60% of main road car traffic being on motorways. The survey found that 72% of all respondents drive on roads generally, but only 67% drive on motorways. Driving on motorways was twice as likely as not for the whole sample compared with 2.6 times more likely for driving on ordinary roads. However, the frequency of driving on motorways was much lower. Whereas 65% of respondents are at least weekly drivers on ordinary roads, only 17% drive as frequently on motorways. Figure 1 gives a fuller picture.

Figure 1: Frequency of driving on ordinary roads and motorways (all respondents)

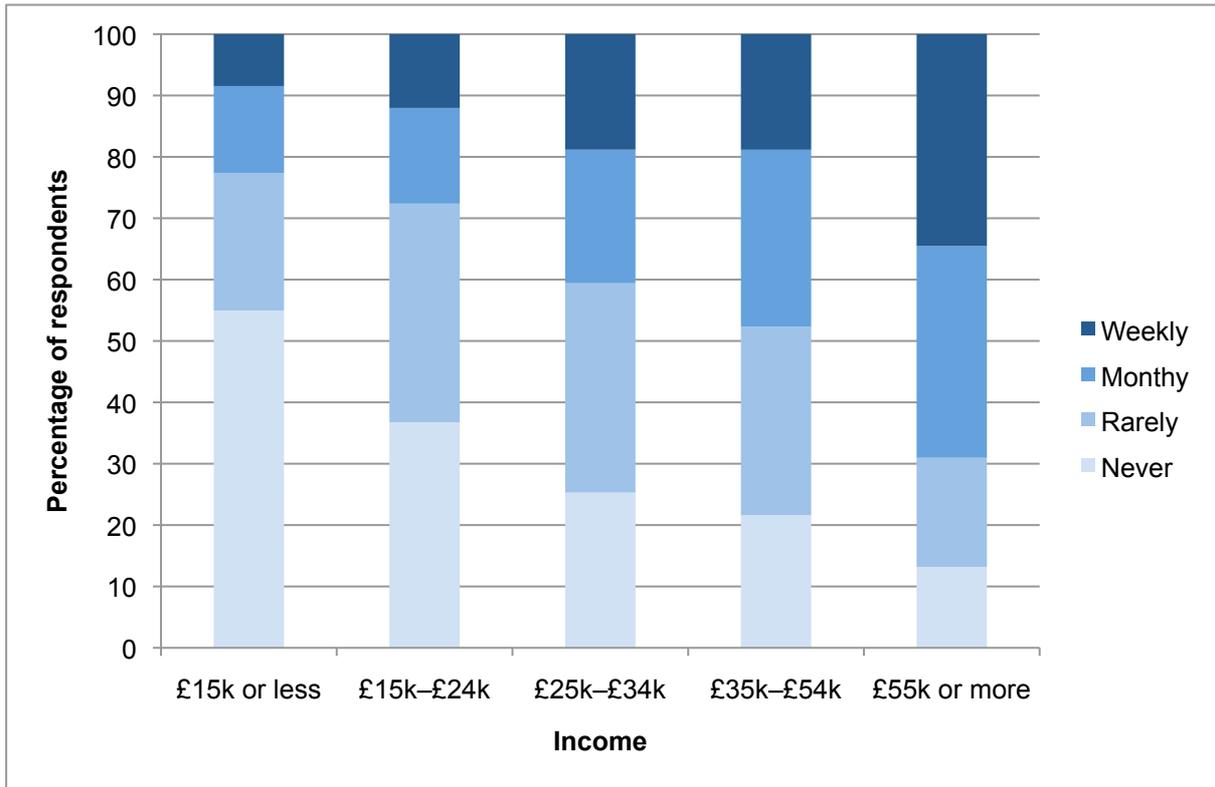


Multiple car ownership sharply increases the probability of driving on motorways, with 86% of adults from multi-car-owning households driving on motorways compared with 77% for single car-owning households. Not surprisingly, adults in multi-car-owning households are more likely to be frequent motorway users than those in single car-owning households, with 18% of adults in single car households driving regularly (more than once a week) on motorways compared with 24% of adults in multi-car-owning households.

This suggests that ownership of a single car means mainly local journeys are more likely, while owning more cars is associated with longer journeys – which rely more on motorways.

Motorway use varies significantly with income, as illustrated in Figure 2.

Figure 2: Frequency of motorway driving by income range



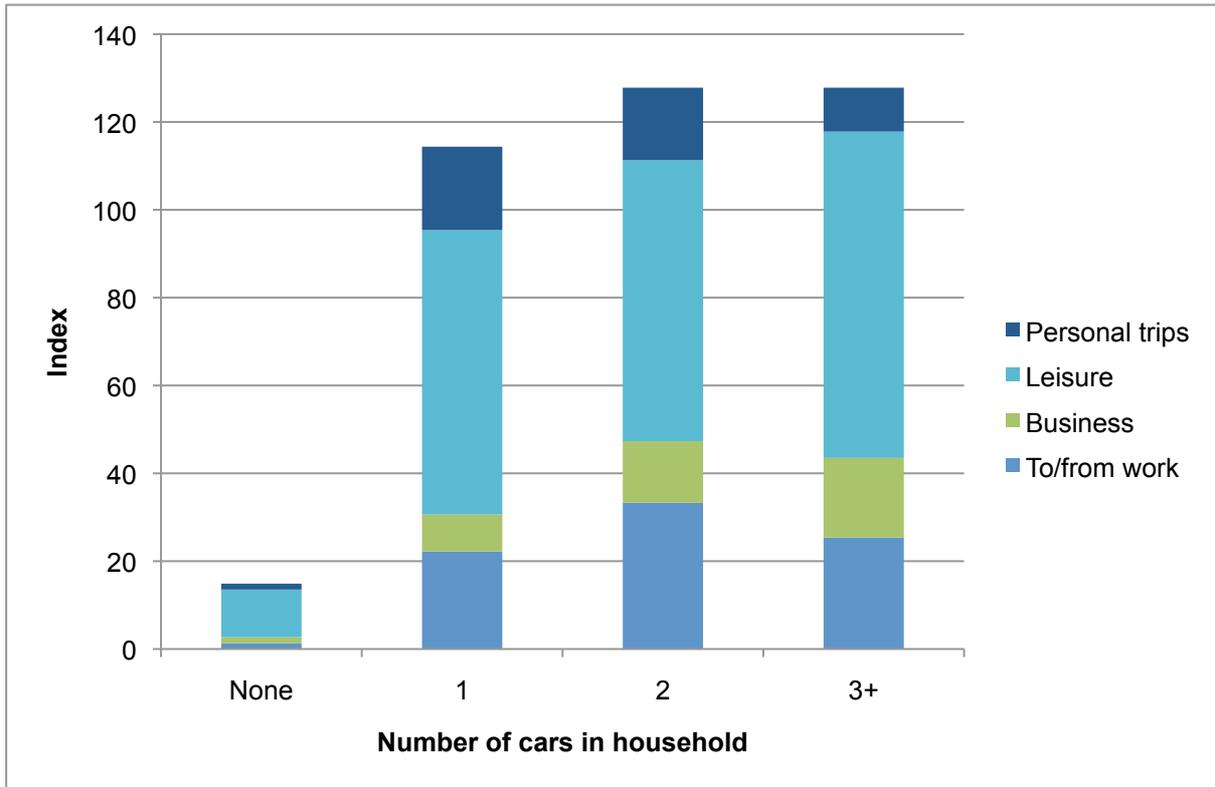
Note: Weekly – once a week or more frequently; monthly – once a month or more but less than once a week; rarely – less than once a month.

The wealthiest group are four times more likely to be weekly motorway users than the least well off. Conversely, members of the least well-off group are four times more likely not to be motorway users compared with members of the wealthiest group.

Purposes of motorway use

Figure 3 shows the ratios cited by respondents of the four most common purposes for using motorways by household car ownership status. The index value of 100 is the use for all the four purposes by the average respondent.

Figure 3: Motorway use purposes by household car ownership status



Overall, leisure travel (49%) is the main reason given by respondents for using motorways followed by work/commuting (20%), personal trips (13%) and business (9%). The use of motorways for commuting rises with the ownership of a second vehicle, and the use for business increases with higher car ownership. Only 19% of adults in non-car-owning households drive on motorways and the main purpose of this is for leisure.

This balance of reasons does not completely reflect the use made of motorways, as some trips are more frequently undertaken than others and some types of journeys are longer than others, which means they are more likely to use motorways. For example, almost a quarter of daily motorway users were commuters, while only one in thirteen respondents using motorways less than once or twice a week but more than once or twice a month commute by motorway. Business trips have an average length of around 20 miles compared with commuting of 9 miles and personal trips of 5¼ miles. So, although less frequent than commuting journeys, business travel measured by vehicle miles is similar to commuting traffic volumes on motorways.

Motorway use by region/country

The likelihood of motorway driving varies significantly by region, as can be seen from Figure 4. The North West, with its relatively generous motorway network, tops the league. Although the motorway network in Scotland is limited to the Central Lowlands, this is where most of the population is located, so most Scots live within

10 miles of a motorway. To a lesser extent, the same is true in the North East, with the population focused in Tyneside and Teesside close to the A1(M), as well as Wales, with its concentration of population in the Newport to Swansea corridor. The large area from the Humber to the Thames estuary, with no motorways other than the A1(M) and the M11, means that motorway use in the east of England and the East Midlands is lower than average. Similarly, London has relatively few motorways for its population of 8 million.

Figure 4: Percentage of respondents using motorways more than once a week

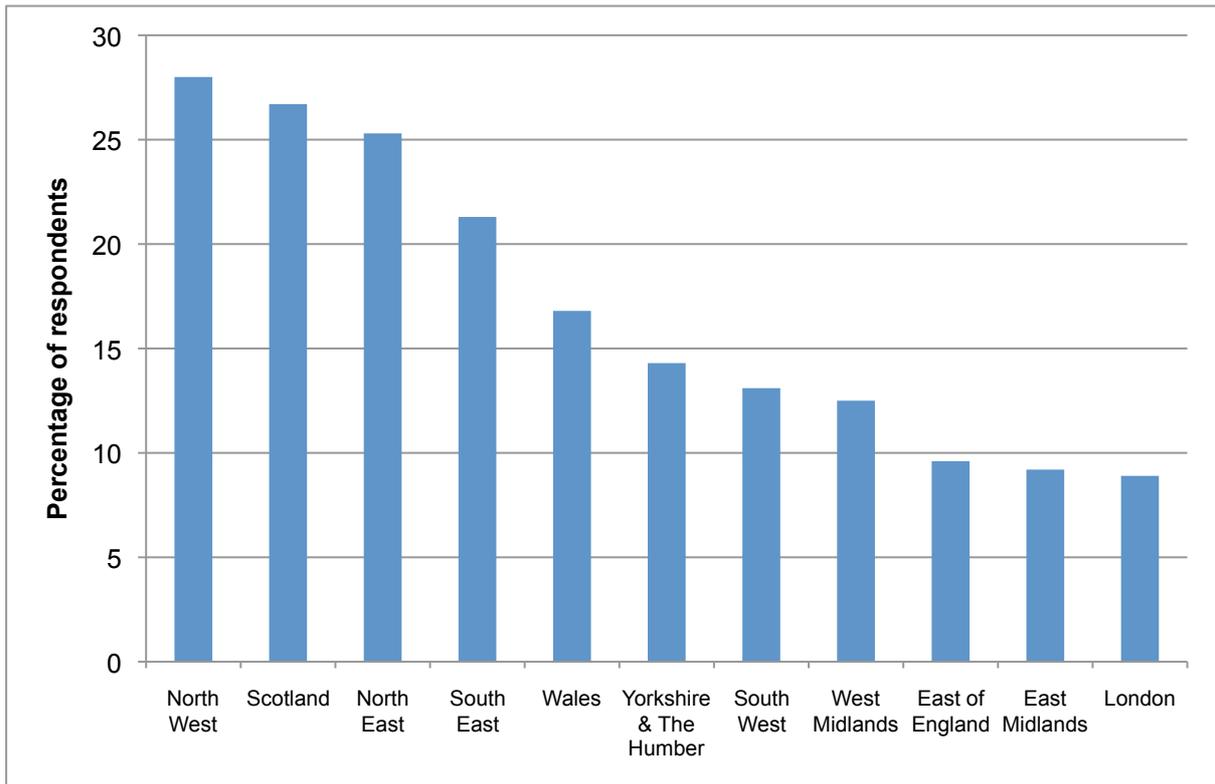
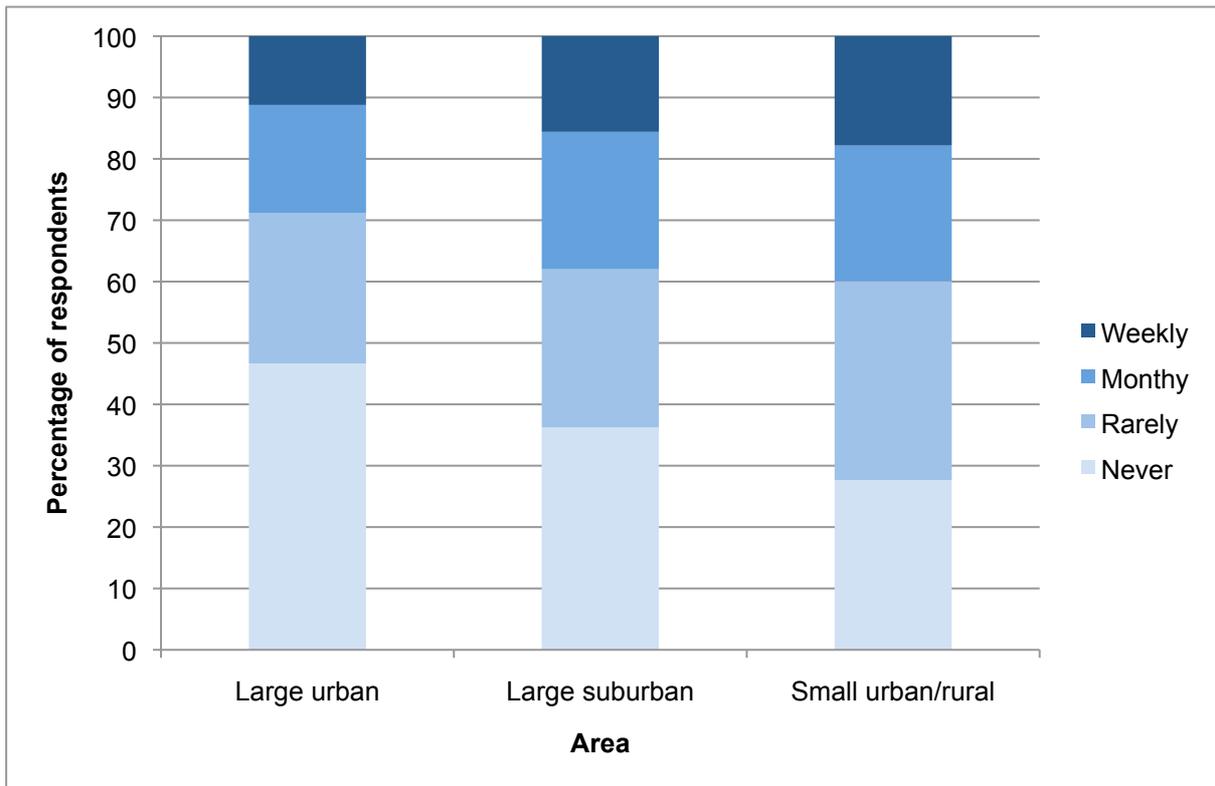


Figure 5 shows how motorway use varies by area type. Generally, the less urban an area, the greater the use of motorways by its residents.

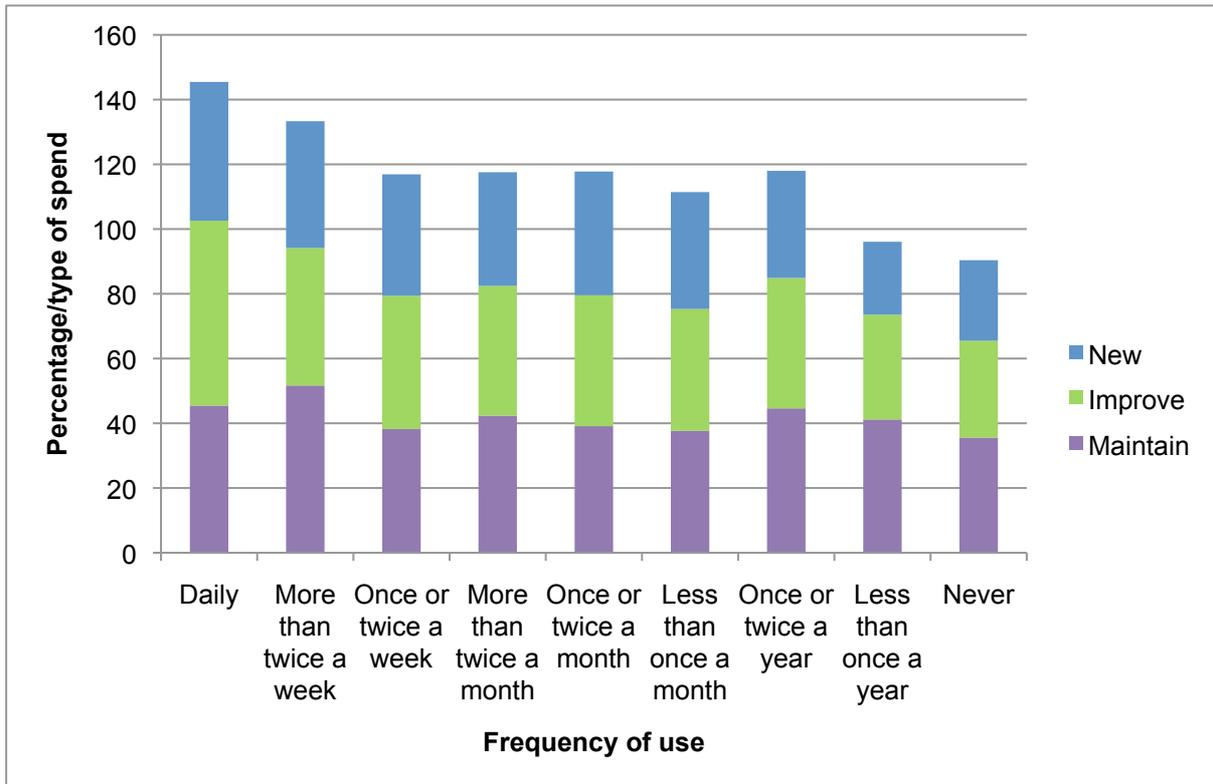
Figure 5: Motorway use by area type



Views on adequacy of spending on motorways

A substantial proportion of respondents think that spending on motorways is inadequate. Overall, 32% thought too little was spent on building new motorways, 38% thought too little was spent on improving the existing motorway system (for example, by adding extra lanes) and 39% believed too little was spent on maintenance. There was only a small tendency for these percentages to increase with higher car ownership, except for improvements to existing motorways: 38% of adults from single car-owning households thought that spending was inadequate in this area while 47% of adults from households owning three cars or more took that view.

Figure 6: Views on adequacy of sending on motorways by frequency of use and type of spend



The more frequently respondents used motorways, the more likely they were to be of the view that spending was insufficient. Again, improvements to existing motorways was the most sensitive issue, with 57% of daily users believing that too little was spent on this compared with only 32% of respondents driving on motorways once a year. Members of households without cars were generally less concerned about the adequacy of spending on motorways, with only 20% believing that spending on new motorways was inadequate.

Attitudes to payment for motorway use by amount of use

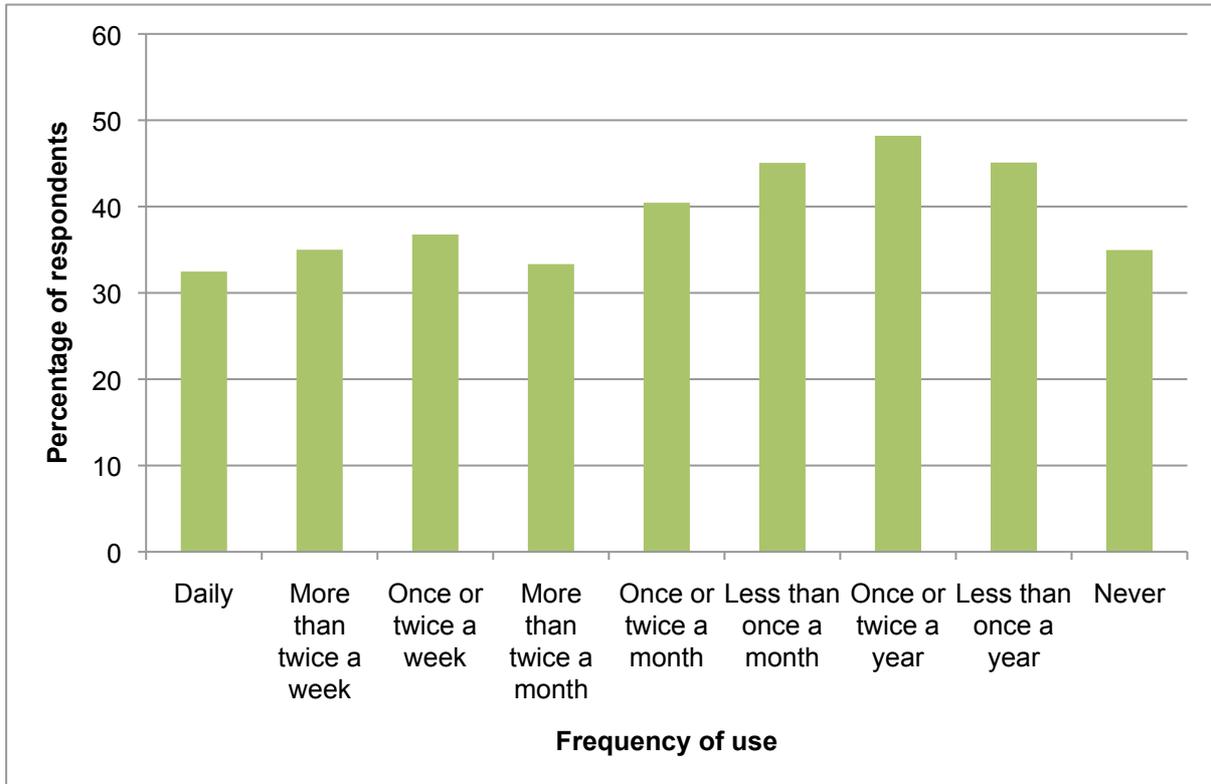
Twenty-two percent of respondents supported a pay-by-use (PBU) scheme for motorways and 50% were opposed. Members of households with multiple cars and frequent motorway users were more likely to oppose PBU than members of non-car-owning households and infrequent users. Support among van drivers was little different at 23%, but was higher among business users at 28%.

Trust in the government to spend the money raised on motorways alone

Trust in the government to spend any receipts from a PBU scheme on motorways only is low, with only 6% of respondents – both motorway users and non-users – trusting the government to do this. This varies little with car ownership status and driving frequency, and van drivers are similarly sceptical.

Fairness of PBU schemes

Figure 7: Opinions on PBU fairness by frequency of motorway use



Thirty-eight percent of respondents think a PBU scheme for motorways would be fair and 26% do not, with little variation between people with differing car ownership status. Perhaps not surprisingly, regular motorway users are less enthusiastic about PBU on motorways, with fewer than a third of daily users thinking PBU would be fair compared with 45%+ of infrequent users. Van drivers appear to be less supportive of motorway PBU, although the sample numbers are too small to draw firm conclusions.

Experience of driving on autoroutes

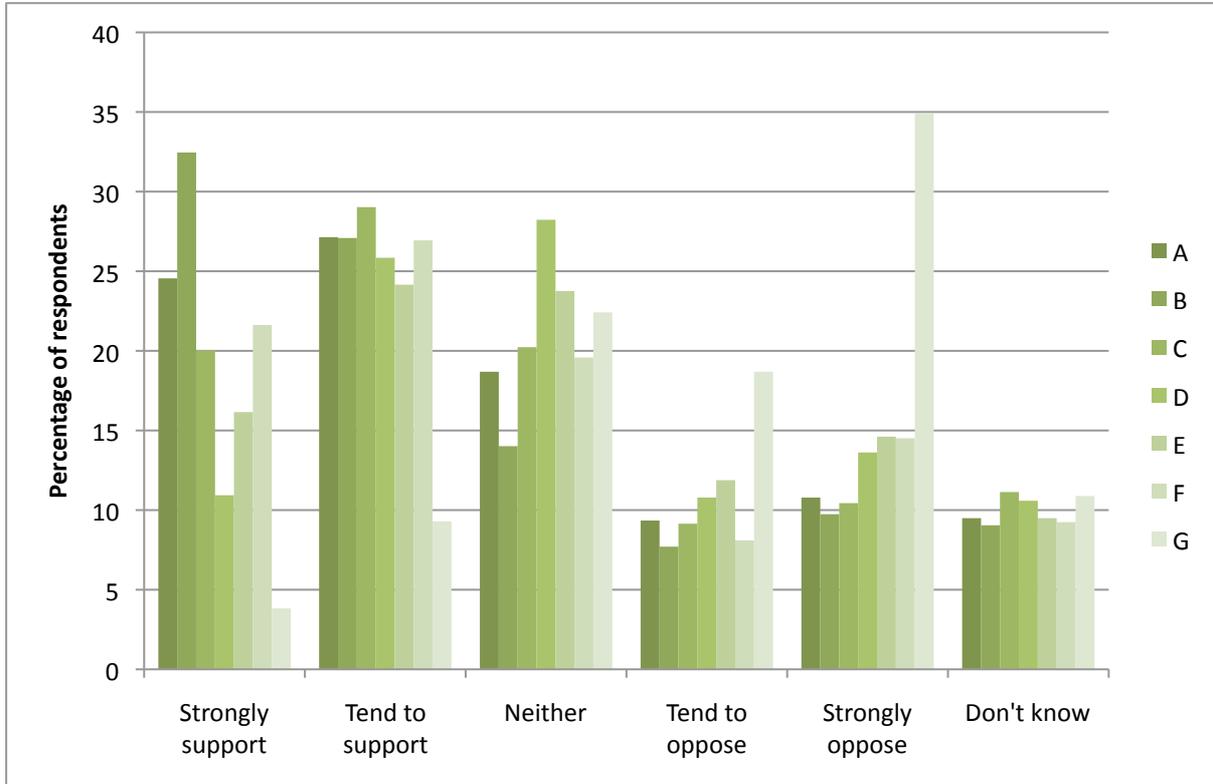
Twenty-nine percent of respondents have driven on an autoroute, with members of multi-car-owning households 16% more likely to have done this (35%) than single car-owning household members. Respondents in non-car-owning households are only 13% likely to have driven on an autoroute and regular van drivers are more likely than average (39%) to have driven on an autoroute. Of those who had driven on autoroutes, half expressed the view that they provided good, fairly good or very good value for money.

Attitudes to different types of motorway PBU schemes

The motorway PBU scheme that respondents were asked to consider involved a payment of £100/year or £5–£10/journey. Views were canvassed on a range of

options for reducing other motoring taxes, spending more on motorways and some form of regulation to stand between the motorist and the Government.

Figure 8: Attitudes to PBU scheme by type of compensating policy



- A: tax disk cost reduced for all drivers (support 52%)
- B: fuel duty reduced for all drivers (support 60%)
- C: every PBU £ raised matched by a price reduction in tax disk/fuel duty for all drivers (support 49%)
- D: overall increase in spending on motorways (support 37%)
- E: extra money spent only on motorways (support 40%)
- F: independent watchdog to protect motorists' interests and ensure money is spent as promised (support 49%)
- G: regulated private company decides how to spend PBU monies (support 13%)

Fifty-four percent of respondents who had driven on an autoroute supported a PBU scheme compared with 51% of those who had not.

Measures that would compensate for the PBU charges through reductions in other motoring taxes are preferred to promises of additional spending on motorways. While there is support for an independent watchdog, this was not overwhelming and the notion of a private 'operator' is deeply unpopular.