Business attitudes to Roads in England

Multi-wave findings

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providing *intelligence*

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1. Introduction

Background

The Department for Transport (DfT) commissioned a study to investigate businesses' attitudes towards roads and specifically the Strategic Road Network (SRN). The study comprised 18 questions developed by DfT which were included on the June 2013 wave of the BDRC Continental Business Opinion Omnibus (wave 1). This report documents the findings from a modified, follow-up study commissioned by DfT in September 2013 (wave 2) to update the Department's evidence base relating to roads. The report tracks the changes in attitudes for the 'core' attitudinal questions, using the data collected in June 2013 as a baseline, as well as combining the data for both waves, enabling behavioural and profile data to be analysed at a more granular level.

Methodology

The Business Opinion Omnibus is a quantitative telephone-based CATI study that is undertaken on a monthly basis, structured as follows:

- 500 interviews with small, medium and large businesses across the UK, 450 of which are with SMEs (defined as those with up to 250 employees)
- Respondent is the main financial decision-maker within the business. In smaller businesses this is usually the owner, in larger ones the Financial Director or Controller
- Each wave is conducted using fresh sample, which is structured by size, sector and region. The profile is maintained each wave, enabling reliable, month-on-month data comparisons
- Data is weighted to be representative of all businesses in the UK with a turnover of £50,000+, based on the business population data from the Government's Department for Business, Innovation and Skills (BIS).

427 interviews were undertaken on behalf of DfT in June 2013. Those businesses based outside England were excluded from the research. Fieldwork took place from 3rd to 13th June.

422 interviews were undertaken on behalf of DfT in September 2013. Those businesses based outside England were excluded from the research. Fieldwork took place from 2nd to 12th September 2013.

Although the Business Opinion Omnibus is designed to be representative, findings in this study are reported and should be treated as representative of the samples surveyed in June and September 2013 rather than of the business population in general.

Please note, the Business Opinion Omnibus is designed to reflect the UK business population and the sample structure is based on firmographic characteristics (e.g. business size, turnover). Limited data is collected about individual respondents and no quotas are placed on individual characteristics, such as demographics (e.g. age, gender, socio-economic group), which are allowed to fall out naturally. Consequently, respondent profiles can vary from one wave to the next. This has implications when comparing data relating to attitudinal questions that rely on personal opinion or experience, such as awareness or understanding.

It is possible that changes observed in responses to some attitudinal questions may be attributable to differences in the personal characteristics and experiences of respondents sampled for the two waves rather than to changes in business attitudes between the two points of measurement.

The questions submitted by DfT were not piloted or cognitively tested for validity and reliability prior to inclusion on the Business Opinion Omnibus. Findings from these questions are included in this report along with cautions and caveats about how the data should be interpreted and used.

For more information on sampling, weighting and for a copy of the questionnaire, please see the Appendix at the end of the report.

Research Objectives

The objective of the wave 2 research was to investigate business usage and attitudes towards roads in England, with particular focus on the Strategic Road Network (SRN), England's core network of motorways and trunk roads. More specifically, the research was designed to:

- Identify the profile of companies who use the roads for business trips, including type of vehicles used, and nature / frequency of trips
- Determine usage of the SRN, and assess how this varies across different business types and sectors
- Identify the extent to which attitudes towards investment in roads have changed over time (since wave 1)
- Identify the extent to which drivers of economic growth have changed over time (since wave 1)

Key demographics and categories used:

Variable	Category	Base size (unweighted) Wave 1	Base size (unweighted) Wave 2
Business size	Micro (1-10 employees)	166	162
	Small (11-50 employees)	132	130
	Medium/large (51+ employees)	129	130
Turnover	£50k - £100k	94	87
	£100k - £1m	128	107
	£1m - £5m	113	131
	£5m+	92	97
Industry	Manufacturing (Production; Construction)	115	106
	Retail & Distribution (Wholesale; Retail; Transport and Communications)	125	121
	Services (Hotels and Catering; Financial, Property and Business Services; Education, Health and Public Administration; Art, Leisure & Other)	187	195
Frequency of any road use by organisation for business travel**	High/medium use (at least once a month)	379	327
	Low/no use (less than once a month/never)	42	89
	Don't know	6*	6*
	Frequent users (high/medium user who uses the road twice a week or more)[1]	339	286
Frequency of SRN use**	High/medium use (at least once a month)	304	286
	Low/no use (less than once a month)	105	127
	Don't know	18*	9*
	Frequent user (high/medium user who uses the road twice a week or more)[2]	239	217
Typical distance travelled by road**	Local (within 15 miles of the main site)	175	149
	Regional (within 50 miles of the main site)	108	93
	National / international (within and outside England and/or the UK)	94	102
	Organisation does not make any road trips for business travel	33*	71*
	Don't know	17*	7*

*Caution – small bases. **See note on next page regarding wording at Q6
Please note that due to the effects of rounding, percentages may not always add to 100%.

[1] Due to the high number of frequent users within the sample, this sub-group of high/medium users will be reported separately.
[2] Due to the high number of frequent users within the sample, this sub-group of high/medium users will be reported separately.

Note about Q6: Types of vehicle used

The question wording of the question asking about types of vehicles used was altered in wave 2. In wave 1, respondents had the choice of selecting any of the vehicles mentioned, or the option to state 'none of these'. In wave 2, the 'none of these' option was split out into two possible answers: 1) none of these – we use another type of vehicle, and 2) none of these – my organisation does not travel by road for business. This change was implemented following issues during the analysis of wave 1 data due to inconsistencies in the way respondents answered this and subsequent questions. The wave 2 question enabled a more accurate answer to be recorded at Q6, and for respondents to be excluded from subsequent questions where appropriate.

Because of this change in question wording, large differences are noted in the results at Q8-10 when comparing wave 1 data to wave 2 data.

However, to enable ease of comparability between the data of the two waves and for the purpose of this report, at Q8-10 the combined data excludes anyone who said 'none of these' in wave 1, and 'none of these – we use another type of vehicle' or 'none of these – my organisation does not travel by road for business' in wave 2. This ensures that we exclude those parts of the data that may have been affected due to the alteration of the question wording.

2. Wave 1 vs. Wave 2

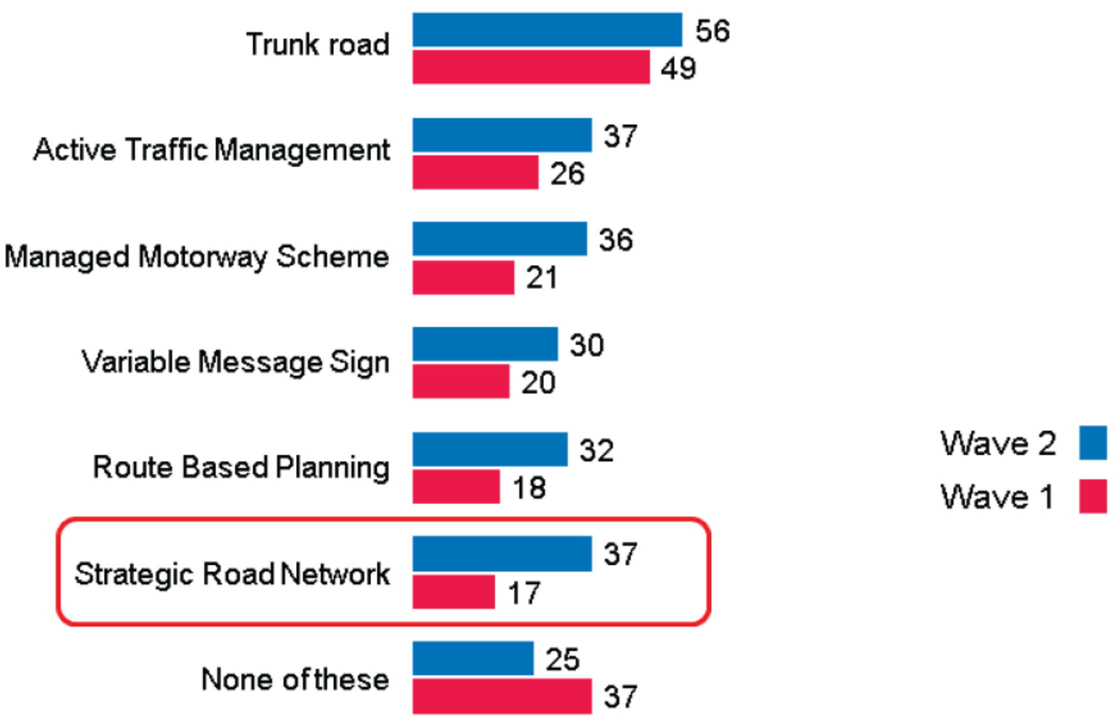
The Strategic Road Network (SRN) is England's core, national road network which consists of motorways and trunk roads. Trunk roads are major 'A' roads, but do not include all 'A' roads. Trunk roads tend to link motorways to each other, or to major cities and ports.

To aid understanding of which roads form part of the Strategic Road Network the description above was read to respondents during the course of the interview. Respondents were also made aware of the trunk roads within the network in the area local to where their business is based.

Awareness of SRN

Before hearing the description of the Strategic Road Network, respondents were asked whether they had heard of the term. In June (wave 1) awareness of the term was 17%. This was substantially higher in September (wave 2) with 37% of respondents saying they were aware.

Have you heard of … (%) 'Yes'



Q4. Which of the following have you heard of?
Please note that for this question, respondents were able to select *as many options as were applicable*.
Base size (unweighted): All respondents – Wave 1 (427); Wave 2 (422)

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When considering these findings, it is important to note that awareness is held at the individual level and not at the organisational level. Response to this question is therefore likely to be influenced by personal, subjective factors relating to the respondent's personal knowledge and experience, such as age, gender, level of education, socio-economic grade and road use. The sample is set up to represent the national demographic profile of businesses, not individuals. Limited personal data is collected about individual respondents and no quotas are placed on personal characteristics. Consequently the sample profile of individuals participating in the survey can vary from one wave to the next. This can impact on the consistency of findings across waves and make it difficult to attribute reasons for change in levels of awareness between waves. It is therefore important to regard changes in awareness levels observed between waves with caution.

Overall, awareness of each of the 6 'road-related' terms tested in question 4 was higher in wave 2 than previously, with an average increase of 13%. The greatest difference in awareness was for the SRN (+20%).

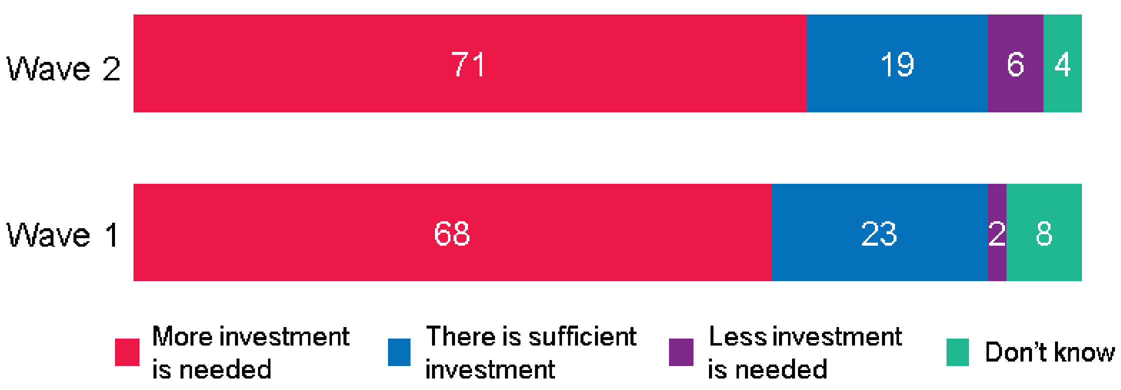
'Trunk road' received the highest recognition across both waves, recalled by around half of respondents in both waves (49% in wave 1; 56% in wave 2)

Counter to the increase in awareness of each of the 'road related' terms is a decrease of 12% in the number of respondents claiming not to have heard of any of the terms at all.

Attitudes towards current / future road investment

This section of the report looks at attitudes towards maintaining England's roads, as well as opinions on investment in <u>all</u> roads, and in the SRN more specifically.

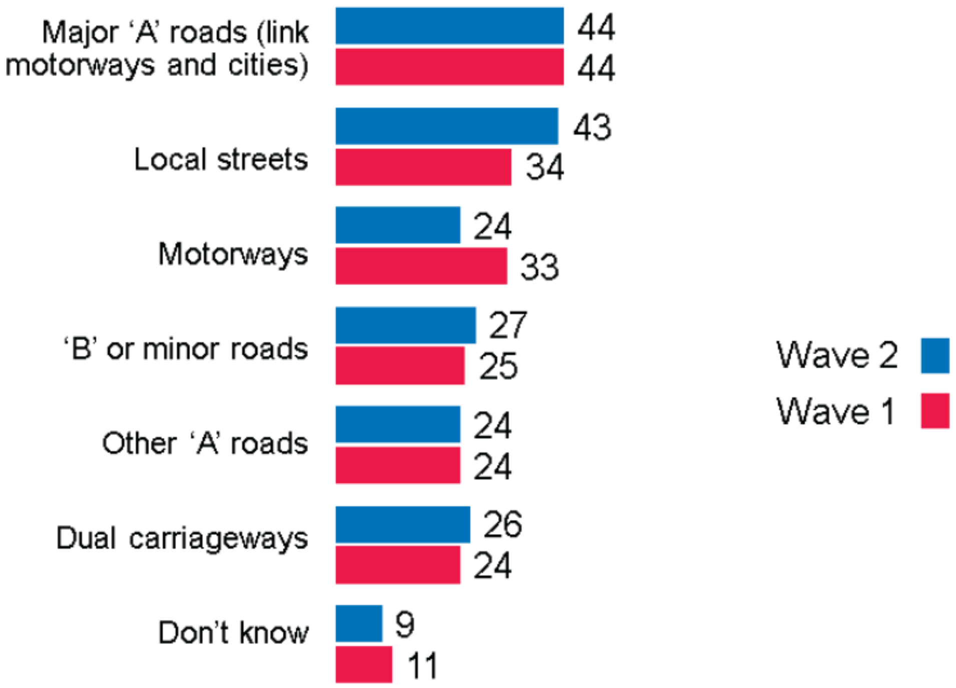
Is enough spent on maintaining / managing England's roads? (%)



Q1 Thinking about the amount of money spent on maintaining and managing England's roads, would you say…
Base size (unweighted): All respondents – Wave 1 (427); Wave 2 (422)

In both waves, around 7 in 10 agreed that more investment is needed to maintain and manage England's roads. There has been a slight decrease in those who feel there is sufficient investment (-4%) and a corresponding increase in those who think less investment is needed (+4%).

Which roads need greater investment? (%)



Q2 Which types of roads would you say require greater investment? Please select all that apply from this list.
Respondents were able to select more than one answer as appropriate.
Base size (unweighted): All respondents – Wave 1 (427); Wave 2 (422)

Respondents were also asked which types of roads they felt require the greater investment. In both waves, more than 2 in 5 (44%) of those interviewed felt that major 'A' roads need more investment.

In wave 2, a similar proportion thought greater investment is required in local streets (43%); an increase of 9% on wave 1.Correspondingly, 9% fewer respondents felt motorways need more investment in wave 2.

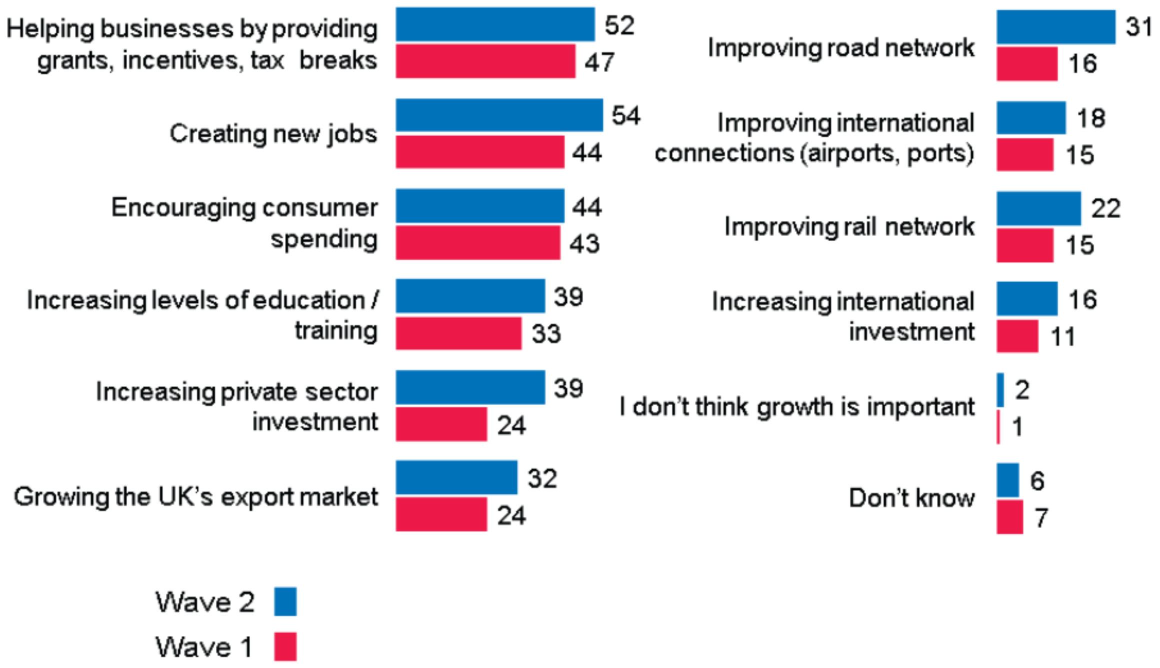
Similar proportions in both waves (around a quarter) each said greater investment should be placed on 'B or minor roads', other A roads and dual carriageways.

As stated earlier, it is important to regard the observed changes in attitudes with some caution. Like levels of awareness, attitudes are held at the individual level and are subject to the influence of personal, subjective factors. Given the context in which the surveys took place it is likely that respondents will have answered attitudinal questions from the point of view of their organisation. However, without being able to analyse responses at the individual level means it is difficult to offer an explanation for the changes in attitude witnessed between the two waves.

Roads, transport and the economy

So how important are improvements to transport, and more specifically the road network, perceived to be in driving growth in the UK economy?

Most important in driving growth in UK economy (%)



Q18 Thinking about the UK economy, which of the following, if any, do you think are most important in driving growth?
For this question, respondents were able to select up-to a maximum of 5 options.
Base size (unweighted): All respondents – Wave 1 (427); Wave 2 (422)

The top three factors perceived as most important in driving economic growth remained the same across both waves. These are:

- Helping businesses by providing grants, incentives and tax breaks
- Creating new jobs
- Encouraging consumer spending.

In wave 1, helping businesses by providing grants, incentives and tax breaks was most commonly mentioned as being important in driving economic growth (47%). This was mentioned by slightly more in wave 2 (52%), although it came second to creating new jobs (54%).

Improvement of transport systems was perceived to be less important in both waves. In wave 1, improving the road network, rail network or international connections (airport/ports) were each regarded as important by 15-16% of respondents surveyed. However each of these was deemed important by more people in wave 2, with improving the road network having the greatest increase of +15%.

A 15% increase was also seen in the prevalence of those who viewed ‘increasing private sector investment’ as important in stimulating growth from wave 1 to wave 2.

All other drivers were mentioned by between 1% and 10% more respondents in wave 2.

As per other attitudinal questions in the survey, it is important to consider these findings with some caution. It is not possible to explain the reasons for the attitudinal change observed. This could, in part, be the result of differences in the personal characteristics of individual respondents surveyed in each wave which cannot be accounted for.

Observations relating to the growth and economy question (Q18)

Responses to Q18 should also be considered within the wider context of attitudes to the economy. The Business Opinion Omnibus routinely collects data using a number of ‘barometer’ questions that track behaviour and sentiment among businesses. Data collected during the 3 month period between the two waves of fieldwork indicate a substantial shift in business confidence. This is consistent with the extensive media coverage during this period that suggested that there had been a meaningful upward shift in economic indicators during 2013.

It is also apparent that the data for Q18 shows an uplift in all the figures for the factors that are thought to be important in driving growth – perhaps reflecting the more upbeat business sentiment apparent in the September wave. A substantial increase (from 16% to 31%) in those respondents who considered investment in the road network to be important is accompanied by increases in those who highlighted the importance of increasing private sector investment, creating new jobs, and growing the export market. There was also an increase in the proportion of respondents who identified the improvement of the rail network as being important.
Alongside the media coverage highlighting the improvement in broad economic indicators, there was extensive discussion and debate about the proposed high speed rail link (HS2) and its

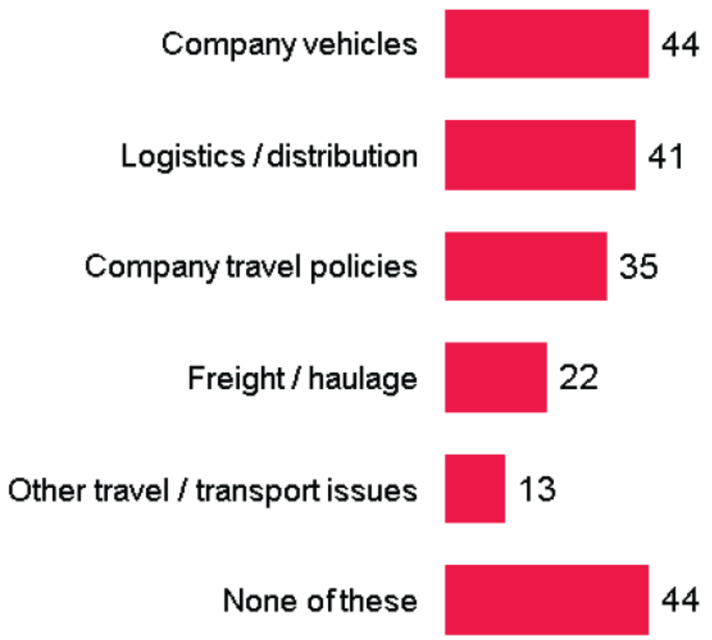
implications for the economy. Some commentators challenged the value of the investment in HS2, relative to other potential infrastructure improvements, such as improving the road network. The attention given to these issues in the media could also go some way to explaining the shift in perceptions detected between the two waves of fieldwork.

As per the previous attitudinal and awareness questions, it is important to regard these findings with a degree of caution and not to draw firm conclusions from the changes observed between the waves.

3. Waves 1 and 2 Combined

This section of the report analyses five ‘core’ questions of the survey, using combined data from both waves 1 and 2. The bases have been combined to give a larger, unweighted base size. This data has then been weighted to be representative of all businesses in England.

Responsibility of respondents for procurement, management or policy decisions on… (%)



Q5 In your company, are you responsible for procurement, management or policy decisions about any of the following areas?
Base size (unweighted): All respondents – waves 1 and 2 combined (849)

More than half of respondents (56%) had some responsibility for areas relating to transport or travel within their organisation, with involvement in ‘company vehicles’ and ‘logistics / distribution’ the most common (44% and 41% respectively). 1 in 3 (35%) had responsibility for ‘company travel policies’, and 1 in 5 (22%) were responsible for ‘freight / haulage’. It was more common for individuals surveyed representing smaller organisations (up to 10 employees) or businesses within the Retail & Distribution sector to have responsibility for some aspect of travel within their organisation.

40% of respondents had responsibility for more than one area relating to transport or travel. This was more typical of the smaller (micro) organisations (43%) and those with annual turnover ranging from £250k-£1m (49%). This was also more prevalent in the Retail & Distribution and Manufacturing sectors (51% and 45% respectively), than in the Services sector (29%).

Profile of businesses where respondent has any responsibility for areas that are travel or transport-related vs. those where respondent has no responsibility

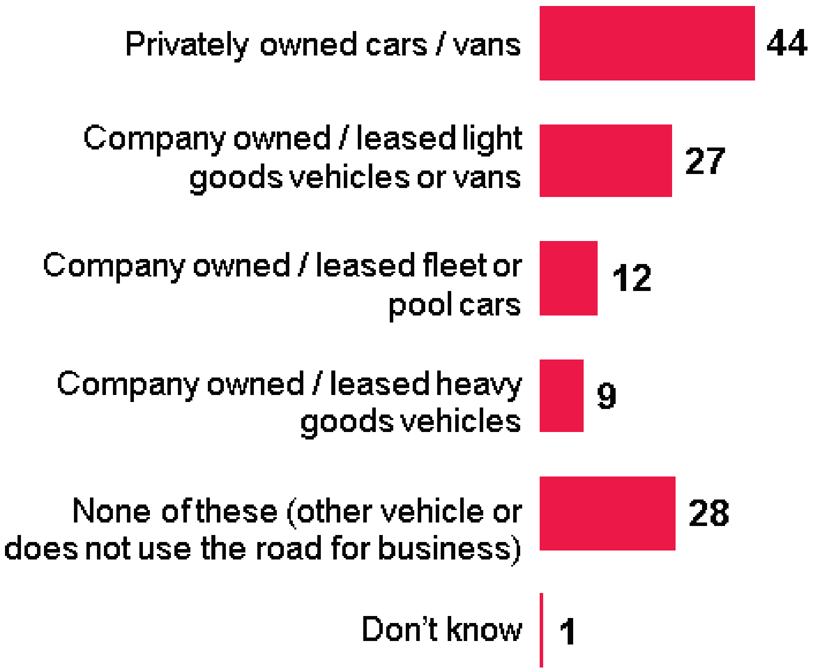
		Responsibility for procurement, management or policy decisions relating to travel/transport		
	Base Sizes (Unweighted)	**Any** (weighted %)	**None** (weighted %)	**Total** (weighted %)
Total	(n=849)	56%	44%	100%
Business size				
Micro (1-10 employees)	(n=328)	58%	42%	100%
- Sole Trader	(n=83)	59%	41%	100%
- 2-10 employees	(n=245)	58%	42%	100%
Small (11-50 employees)	(n=262)	47%	53%	100%
Medium/Large (51+ employees)	(n=259)	40%	60%	100%
- 51-250 employees	(n=171)	42%	58%	100%
- 250+ employees	(n=88)	22%	78%	100%
Turnover				
£50k-£250k	(n=260)	52%	48%	100%
£250k-£1m	(n=156)	67%	33%	100%
£1m-£5m	(n=244)	53%	47%	100%
£5m+	(n=189)	49%	51%	100%
Industry				
Manufacturing	(n=221)	58%	42%	100%
- Production	(n=116)	52%	48%	100%
- Construction	(n=105)	63%	37%	100%
Retail & Distribution	(n=246)	69%	31%	100%
- Wholesale	(n=93)	70%	30%	100%
- Retail	(n=97)	66%	34%	100%
Services	(n=382)	46%	54%	100%
- Fin/Prop/Bus Services	(n=170)	48%	52%	100%

Q5 In your company, are you responsible for procurement, management or policy decisions about any of the following areas?
Base size (unweighted): All respondents – waves 1 and 2 combined (849)

Types of vehicles used for business travel

Employees in around 7 in 10 businesses surveyed (72%) travelled for business by car, light goods vehicle (LGV) or heavy goods vehicles (HGV), with use of privately owned cars / vans (grey fleet) being most common (used by 44% of businesses). Just 9% used heavy goods vehicles. Company owned or leased light goods vehicles were used by 27% of businesses sampled.

Types of vehicles used for business travel (%)



Q6 Which of the following types of vehicles are used by employees in your organisation when travelling for business? Please note that for this question, respondents were able to select as many options as were applicable
Base size (unweighted): All respondents – waves 1 and 2 combined (849)

Larger businesses, in terms of turnover and employee numbers, were more likely to use any of the stated vehicles for employee business travel. For example, 68% of those businesses surveyed with £50k-£250k turnover used any of the stated vehicles compared to 80% of businesses with a turnover of £1-£5m or £5m+; 86% of those with 250+ employees used any of the stated vehicles compared to 72% of those with 1-10 employees. Businesses surveyed in the Manufacturing sector were more likely to use one or more of the stated vehicles (86%) than those in the Retail & Distribution or Services sectors (76% and 60% respectively).

Vehicle use also differed by region of operation, with businesses based in London (56%) and the North West (57%) least likely to use any of the specified vehicles for business travel and those in the North East (86%) and East[3] (85%) most likely to do so. This is shown in the table below.

[3] Caution - small base size

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Profile of businesses that use specified vehicles for employee business travel

	Base Sizes (Unweighted)	Use any specified vehicles for business travel? Yes (weighted %)	No (weighted %)	Don't know (weighted %)	Total
Total	(n=849)	71%	28%	1%	100%
Business size					
Micro (1-10 employees)	(n=328)	72%	28%	1%	100%
- Sole Trader	(n=83)	68%	32%	-	100%
- 2-10 employees	(n=245)	73%	26%	1%	100%
Small (11-50 employees)	(n=262)	69%	31%	-	100%
Medium/Large (51+ employees)	(n=259)	75%	24%	1%	100%
- 51-250 employees	(n=171)	73%	26%	1%	100%
- 250+ employees	(n=88)	86%	14%	-	100%
Turnover					
£50k-£250k	(n=260)	68%	31%	1%	100%
£250k-£1m	(n=156)	74%	26%	-	100%
£1m-£5m	(n=244)	80%	20%	-	100%
£5m+	(n=189)	80%	20%	1%	100%
Industry					
Manufacturing	(n=221)	86%	14%	-	100%
- Production	(n=116)	83%	17%	-	100%
- Construction	(n=105)	88%	12%	-	100%
Retail & Distribution	(n=246)	76%	24%	-	100%
- Wholesale	(n=93)	70%	29%	1%	100%
- Retail	(n=97)	78%	22%	-	100%
Services	(n=382)	60%	39%	1%	100%
- Fin/Prop/Bus Services	(n=170)	63%	35%	2%	100%
Region					
North West	(n=94)	57%	43%	-	100%
North East	(n=120)	86%	12%	1%	100%
East*	(n=79)	85%	15%	-	100%
South East	(n=149)	74%	26%	-	100%
South West	(n=91)	64%	36%	-	100%
London	(n=163)	56%	42%	3%	100%
Midlands	(n=153)	79%	21%	-	100%

Q6 Which of the following types of vehicles are used by employees in your organisation when travelling for business?
Please note that for this question, respondents were able to select *as many options as were applicable*
Base size (unweighted): All respondents – waves 1 and 2 combined (849)

*Caution - small base size

Larger businesses sampled, in terms of turnover and number of employees, were more likely to use a wider variety of vehicle types. Of the vehicle types asked about (company owned / leased LGVs / vans, company owned / leased HGVs, company owned / leased cars and grey fleet):

- 20% of organisations surveyed with £5m+ turnover used 3 or more vehicle types, compared to 3% of organisations with £50k-£250k turnover;
- 22% of those with 250+ employees used 3 or more vehicle types, compared to 3% of micro businesses.

Diversity of vehicles used by business profile

		Diversity of vehicles used					
	Base Sizes (Unweighted)	None (weighted %)	1 type of vehicle (weighted %)	2 types of vehicles (weighted %)	3 or more types of vehicles (weighted %)	Don't know (weighted %)	Total (weighted %)
Total	(n=849)	28%	56%	10%	4%	1%	100%
Business size							
Micro (1-10 employees)	(n=328)	28%	59%	10%	3%	1%	100%
- Sole Trader	(n=83)	32%	65%	1%	2%	-	100%
- 2-10 employees	(n=245)	26%	56%	13%	4%	1%	100%
Small (11-50 employees)	(n=262)	31%	48%	13%	7%	-	100%
Medium/Large (51+ employees)	(n=259)	24%	46%	16%	13%	1%	100%
- 51-250 employees	(n=171)	26%	46%	16%	11%	1%	100%
- 250+ employees	(n=88)	14%	47%	17%	22%	-	100%
Turnover							
£50k-£250k	(n=260)	31%	58%	7%	3%	1%	100%
£250k-£1m	(n=156)	26%	54%	15%	5%	-	100%
£1m-£5m	(n=244)	20%	56%	18%	7%	-	100%
£5m+	(n=189)	20%	41%	19%	20%	1%	100%
Industry							
Manufacturing	(n=221)	14%	67%	11%	9%	-	100%
- Production	(n=116)	17%	64%	9%	10%	-	100%
- Construction	(n=105)	12%	68%	12%	8%	-	100%
Retail & Distribution	(n=246)	24%	57%	14%	5%	-	100%
- Wholesale	(n=93)	29%	48%	13%	8%	1%	100%
- Retail	(n=97)	22%	64%	12%	3%	-	100%
Services	(n=382)	39%	50%	8%	1%	1%	100%
- Fin/Prop/Bus Services	(n=170)	35%	49%	13%	1%	2%	100%

Q6 which of the following types of vehicles are used by employees in your organisation when travelling for business?
Please note that for this question, respondents were able to select *as many options as were applicable*
Base size (unweighted): All respondents – waves 1 and 2 combined (849)

Use of company owned or leased light goods vehicles / vans was more characteristic of those businesses surveyed in the Manufacturing sector (54%), particularly within the Construction industry (65%). Privately owned cars / vans were more typical of organisations in the Services sector: 75% of organisations surveyed in this sector used grey fleet for business travel. Larger organisations sampled were more likely to use fleet or pool cars (36% of those with 51+ employees, and 48% of those with £5m+ turnover).

Please note that due to small base sizes sub-group analysis has only been conducted when a minimum of 80 respondents were interviewed. Consequently the following sub-groups have been excluded from analysis of this question: sole traders, organisations with 250+ employees, retail and wholesale.

Which businesses use which types of vehicles for business travel?

	Base Sizes (Unweighted)	Vehicle Type: Privately owned cars / vans (weighted %)	Company owned / leased light goods vehicles or vans (weighted %)	Company owned / leased fleet or pool cars (weighted %)	Company owned / leased heavy goods vehicles (weighted %)
Total	(n=638)	62%	37%	17%	12%
Business size					
Micro (1-10 employees)	(n=240)	64%	35%	14%	10%
- 2-10 employees	(n=180)	61%	40%	18%	10%
Small (11-50 employees)	(n=186)	51%	47%	25%	20%
Medium/Large (51+ employees)	(n=212)	56%	46%	36%	23%
- 51-250 employees	(n=137)	57%	45%	35%	20%
Turnover					
£50k-£250k	(n=178)	64%	33%	12%	11%
£250k-£1m	(n=110)	62%	42%	19%	13%
£1m-£5m	(n=192)	52%	46%	30%	13%
£5m+	(n=158)	60%	48%	48%	28%
Industry					
Manufacturing	(n=191)	50%	54%	16%	13%
- Production	(n=99)	67%	37%	19%	12%
- Construction	(n=92)	39%	65%	14%	14%
Retail & Distribution	(n=193)	58%	40%	19%	17%
Services	(n=254)	75%	20%	16%	8%
- Fin/Prop/Bus Services	(n=124)	76%	21%	20%	6%

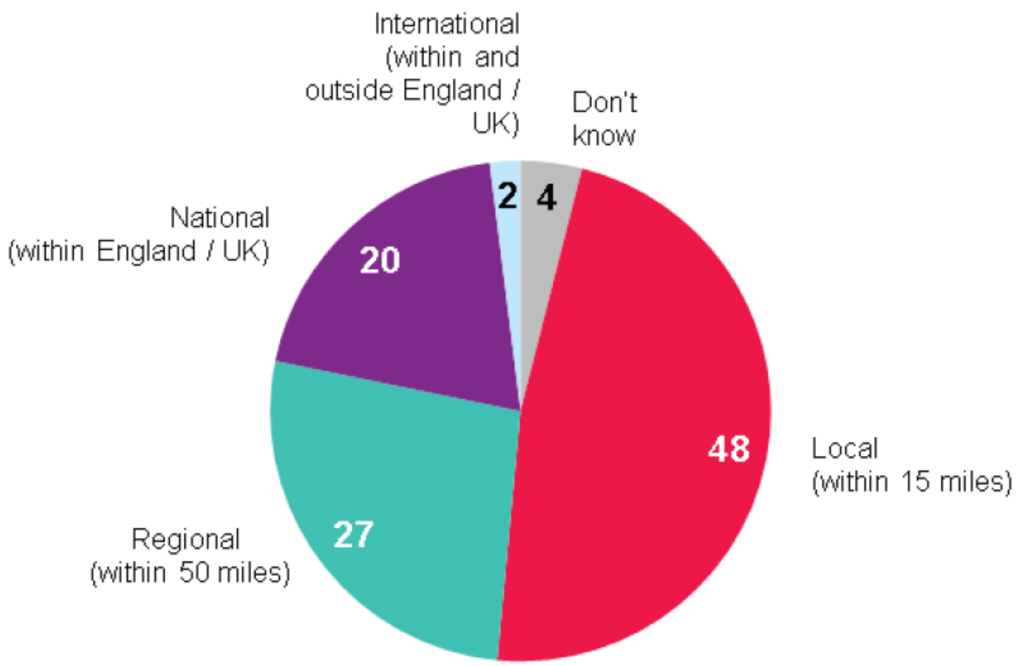
Q6 Which of the following types of vehicles are used by employees in your organisation when travelling for business?
Please note that for this question, respondents were able to select *as many options as were applicable*.
Base size (unweighted): All who use one or more of the vehicle types specified – waves 1 and 2 combined (638)
Due to small base sizes (n=less than 80) the following sub-groups have been excluded from analysis: sole traders, organisations with 250+ employees, retail, wholesale, North West, East and South West.

Type of business-related road trip

Just under a half (48%) of businesses surveyed typically made local road trips (defined as within 15 miles of their location). A further quarter (27%) typically travelled by road regionally (within a 50 mile radius). Only 22% of businesses travelled further afield by road. Local road trips were more characteristic of smaller organisations in the sample (52% of micro businesses and 54% of those with £50-£250k turnover). National / international trips were more prevalent amongst organisations surveyed with a £5m+ turnover (49%). National / international road trips were also more typical of those organisations in the Production sector (36%), engaged in Financial Services Property or Business Services (38%) and least typical amongst those in Construction (5%). Those organisations based in London and the South East were more likely to make local road trips (56% and 55% respectively), along with those in the Construction sector (56%). Regional trips were more characteristic of those organisations sampled based in the Midlands (34%).

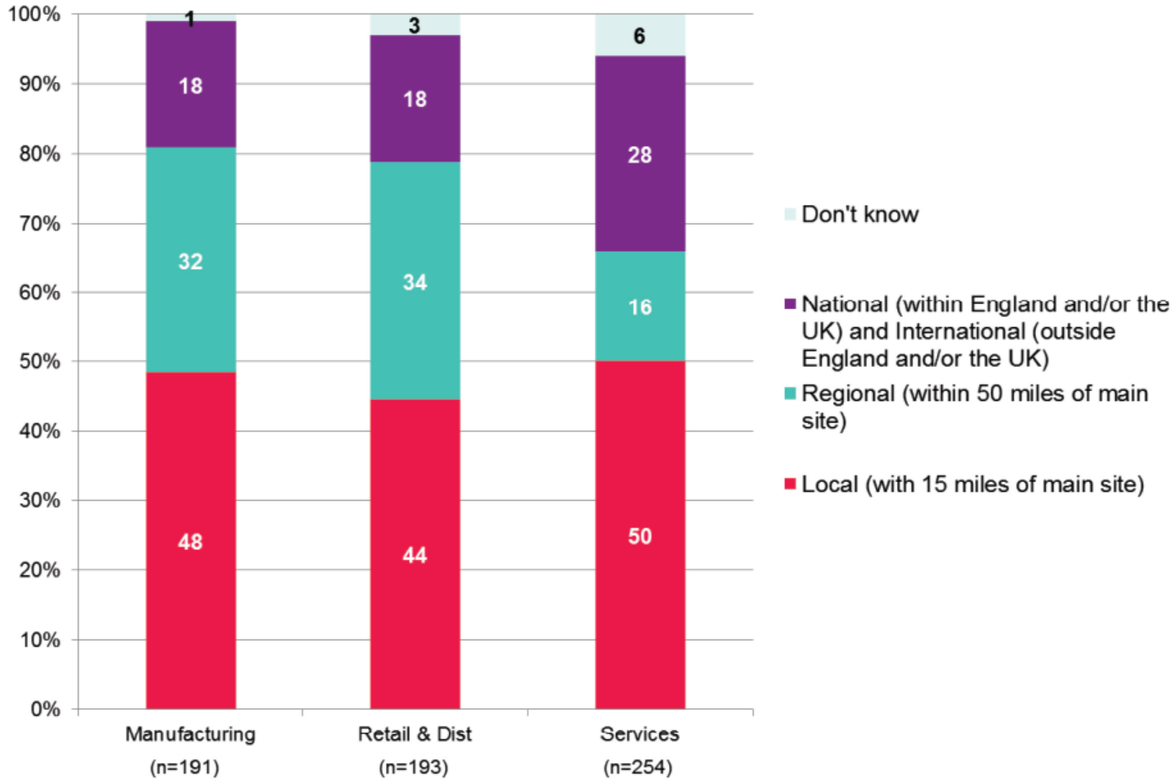
Please note that due to small base sizes sub-group analysis has only been conducted when a minimum of 80 respondents were interviewed. Consequently the following sub-groups have been excluded from analysis of this question: sole traders, organisations with 250+ employees, retail, wholesale, East, North West and South West.

Distance of typical road trips undertaken (%)



Q8 Would you say that road trips made by your organisation are typically…
Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

Types of road trips undertaken by industry (%)



Q8 Would you say that road trips made by your organisation are typically…

Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

Profile of businesses by typical trip distance

	Base Sizes (Unweighted)	Local (within 15 miles) (weighted %)	Regional (within 50 miles) (weighted %)	National/ International (within and outside England and/or the UK) (weighted %)
Total	(n=638)	48%	27%	22%
Business size				
Micro (1-10 employees)	(n=240)	52%	23%	20%
- 2-10 employees	(n=180)	53%	23%	19%
Small (11-50 employees)	(n=186)	29%	45%	25%
Medium/Large (51+ employees)	(n=212)	33%	29%	34%
- 51-250 employees	(n=137)	35%	29%	32%
Turnover				
£50k-£250k	(n=178)	54%	25%	16%
£250k-£1m	(n=110)	43%	28%	28%
£1m-£5m	(n=192)	34%	31%	29%
£5m+	(n=158)	20%	30%	49%
Industry				
Manufacturing	(n=191)	48%	32%	18%
- Production	(n=99)	36%	27%	36%
- Construction	(n=92)	56%	36%	5%
Retail & Distribution	(n=193)	44%	34%	18%
Services	(n=254)	50%	16%	28%
- Fin/Prop/Bus Services	(n=124)	39%	15%	38%
Region				
North East	(n=98)	48%	29%	21%
South East	(n=120)	55%	18%	24%
London	(n=103)	56%	21%	22%
Midlands	(n=120)	48%	34%	11%

Q8 Would you say that road trips made by your organisation are typically…

Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

Due to small base sizes (n=less than 80) the following sub-groups have been excluded from analysis: sole traders, organisations with 250+ employees, retail, wholesale, North West, East and South West.

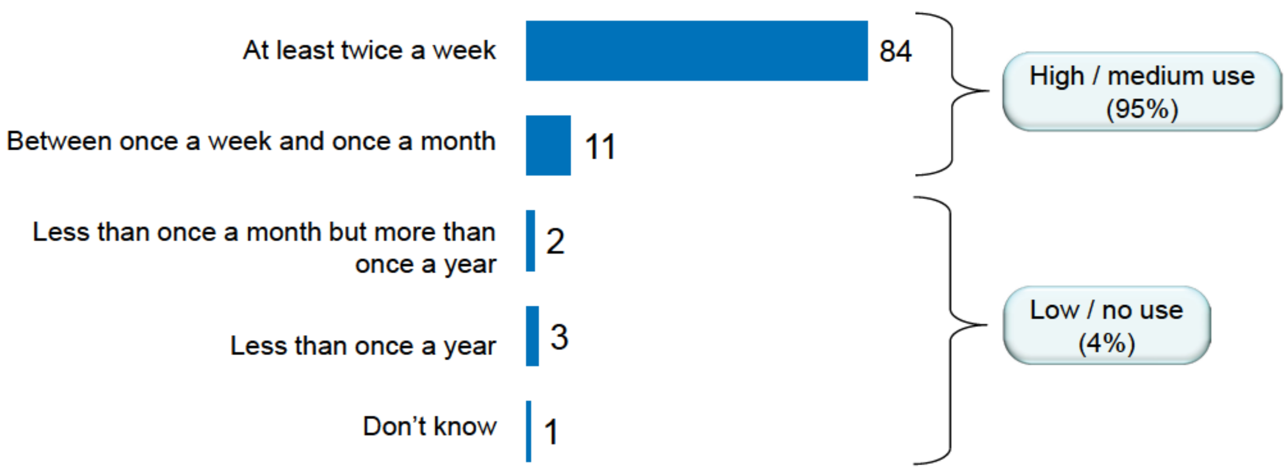
Frequency of business-related road usage

As shown below, 84% of companies surveyed (who used any of the vehicles mentioned) used the roads for business-related trips at least twice a week. This was slightly more prevalent amongst those in Manufacturing (87%) (and Construction in particular – 93%), and Retail & Distribution (88%) than those in the Service industry (77%). Only a very small number were undertaking road trips less than once a month (2%) or less than once a year (3%).

'Frequent' usage (i.e. at least twice a week) was less characteristic of those businesses surveyed in the Service sector, and those based in London. In addition, 'frequent' usage was also less prevalent amongst those travelling furthest, either nationally or internationally (80%), than those travelling regionally (87%) or locally (86%). No major differences in road usage were observed in relation to size of the organisations surveyed, although 88% of larger organisations (51+ employees) used the roads on a 'frequent' basis compared to 81% of small businesses (11-50 employees) and 84% of micro businesses (1-10 employees). These findings are detailed in the table ahead.

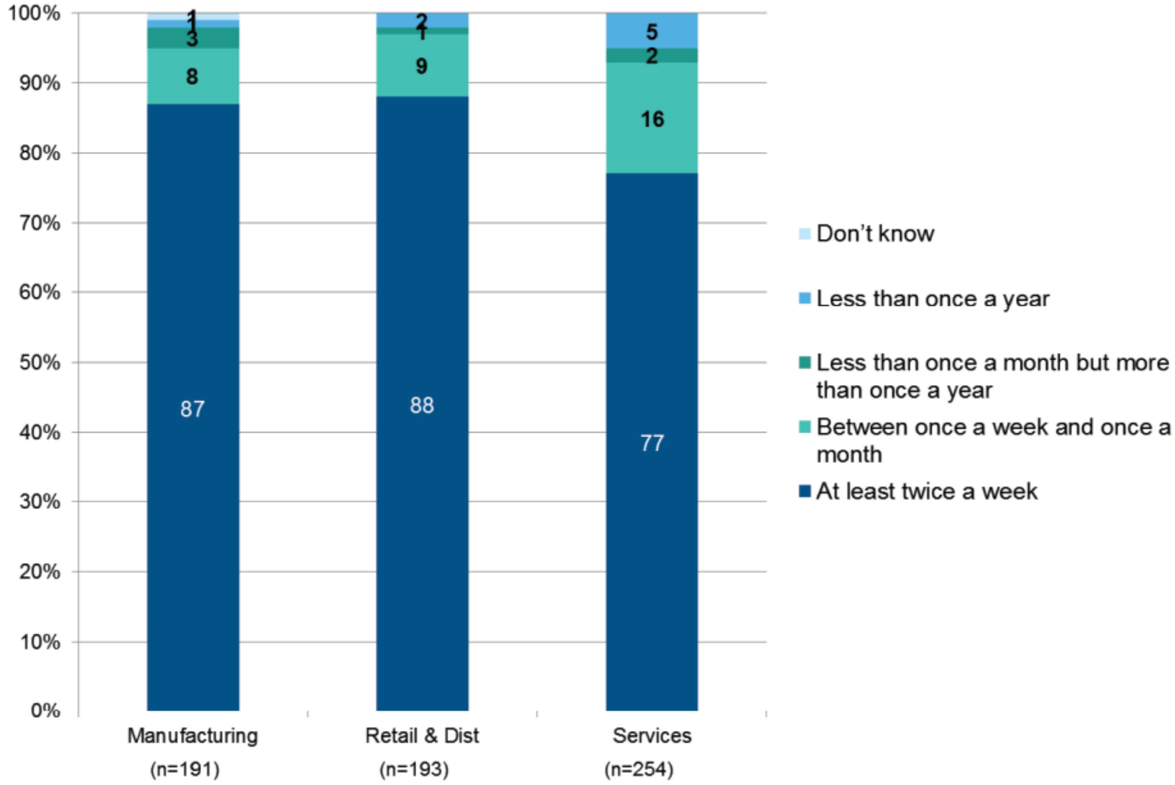
Please note that due to small base sizes sub-group analysis has only been conducted when a minimum of 80 respondents were interviewed. Consequently the following sub-groups have been excluded from analysis of this question: sole traders, organisations with 250+ employees, retail, wholesale, East, North West and South West.

Frequency of business-related road trips (%)



Q9 In general how often does your organisation use the road for business travel?
Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

Frequency of business-related road usage by industry (%)



Q9 In general how often does your organisation use the road for business travel?

Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

bdrc continental

Profile of businesses using roads for business travel

	Usage of Roads					
	Base Sizes (unweighted)	High/Med (at least once a month) (weighted %)	Low (less than once a month / never) (weighted %)	Don't Know (weighted %)	Total	Frequent (high/medium users who use the road twice a week or more) (weighted %)
Total	(n=638)	95%	4%	1%	100%	84%
Business Size						
Micro (1-10 employees)	(n=240)	95%	5%	-	100%	84%
- 2-10 employees	(n=180)	94%	6%	-	100%	82%
Small (11-50 employees)	(n=186)	96%	3%	1%	100%	81%
Medium/Large (51+ employees)	(n=212)	95%	3%	2%	100%	88%
- 51-250 employees	(n=137)	96%	3%	2%	100%	87%
Turnover						
£50k-£250k	(n=178)	95%	5%	1%	100%	84%
£250k-£1m	(n=110)	94%	6%	-	100%	81%
£1m-£5m	(n=192)	98%	-	2%	100%	90%
£5m+	(n=158)	96%	3%	1%	100%	84%
Industry						
Manufacturing	(n=191)	95%	4%	1%	100%	87%
- Production	(n=99)	92%	7%	-	100%	78%
- Construction	(n=92)	97%	1%	2%	100%	93%
Retail & Distribution	(n=193)	97%	3%	-	100%	88%
Services	(n=254)	93%	6%	-	100%	77%
- Fin/Prop/Bus Services	(n=124)	91%	8%	1%	100%	75%
Region						
North East	(n=98)	96%	4%	-	100%	80%
South East	(n=120)	97%	3%	-	100%	86%
London	(n=103)	87%	12%	1%	100%	71%
Midlands	(n=120)	96%	2%	2%	100%	88%
Distance travelled						
Local (within 15 miles)	(n=253)	97%	2%	-	100%	86%
Regional (within 50 miles)	(n=188)	99%	1%	-	100%	87%
National / international (within and outside England and/or the UK)	(n=182)	88%	11%	-	100%	80%

Q9 In general how often does your organisation use the road for business travel?
Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

Due to small base sizes (n=less than 80) the following sub-groups have been excluded from analysis: sole traders, organisations with 250+ employees, retail, wholesale, North East, East and South West.

Use of the Strategic Road Network

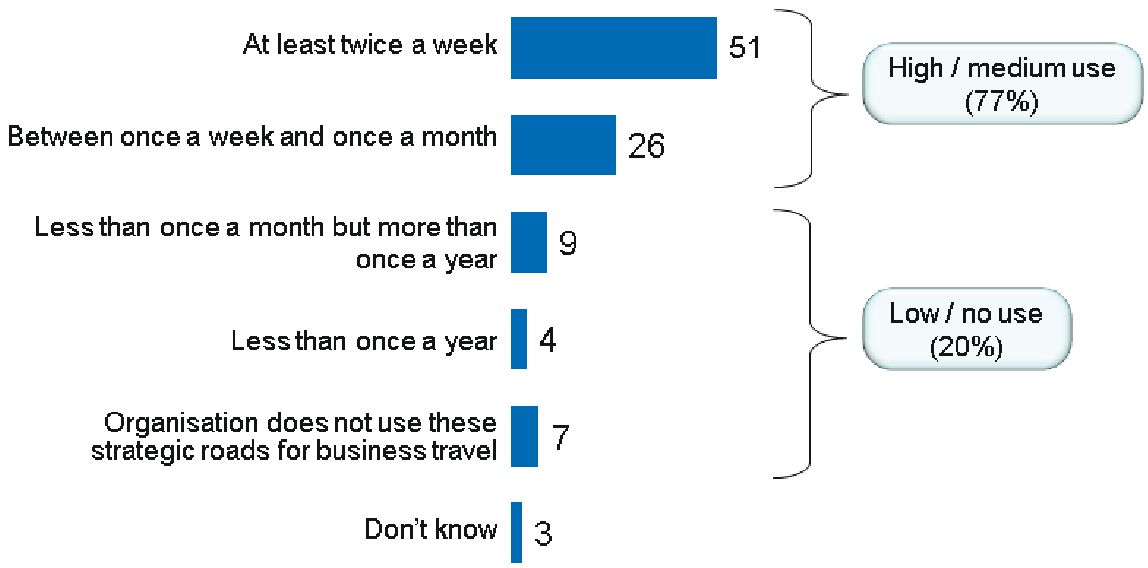
The Strategic Road Network (SRN) is England's core, national road network which consists of motorways and trunk roads. Trunk roads are major 'A' roads, but do not include all 'A' roads. Trunk roads tend to link motorways to each other, or to major cities and ports.

To aid understanding of which roads form part of the Strategic Road Network, the description above was read to respondents during the course of the interview. Respondents were also made aware of the trunk roads within the network in the area local to where their business is based.

After respondents were prompted with a description of the SRN, and a list of roads in the vicinity of their organisation, 77% of respondents who used any of the vehicles mentioned reported that their employees use the SRN at least once a month for business-related travel. Around half (51%) of businesses surveyed used the SRN on a 'frequent' basis (i.e. at least twice a week). As shown in the table on the following page, 'frequent' usage was more apparent amongst businesses surveyed who typically travelled outside their local area on business-related road trips (68% of those making national/international trips compared to 39% of those making local trips).

Just over three quarters of businesses surveyed (77%) were defined as high / medium users of the SRN (i.e. use it at least once a month), while 20% used it less often or not at all and 3% did not know.

Frequency of business-related usage of the SRN (%)



Q10 In general, how often does your organisation use motorways and trunk roads for business travel?
Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

Please note that due to small base sizes sub-group analysis has only been conducted when a minimum of 80 respondents were interviewed. Consequently the following sub-groups have been excluded from analysis of this question: sole traders, organisations with 250+ employees, retail, wholesale, East, North West and South West.

Profile of businesses using the SRN for business travel

	Usage of SRN					
	Base Sizes (unweighted)	High/Med (at least once a month) (weighted %)	Low (less than once a month / never) (weighted %)	Don't Know (weighted %)	Total	Frequent (high/medium users who use the road twice a week or more) (weighted %)
Total	(n=638)	77%	20%	3%	100%	51%
Business Size						
Micro (1-10 employees)	(n=240)	76%	21%	3%	100%	48%
- 2-10 employees	(n=180)	74%	23%	3%	100%	47%
Small (11-50 employees)	(n=186)	81%	15%	5%	100%	65%
Medium/Large (51+ employees)	(n=212)	85%	12%	3%	100%	69%
- 51-250 employees	(n=137)	84%	12%	3%	100%	67%
Turnover						
£50k-£250k	(n=178)	75%	22%	4%	100%	44%
£250k-£1m	(n=110)	78%	20%	1%	100%	58%
£1m-£5m	(n=192)	83%	14%	4%	100%	65%
£5m+	(n=158)	92%	7%	1%	100%	79%
Industry						
Manufacturing	(n=191)	77%	17%	6%	100%	49%
- Production	(n=99)	77%	14%	8%	100%	51%
- Construction	(n=92)	76%	19%	5%	100%	48%
Retail & Distribution	(n=193)	83%	17%	1%	100%	68%
Services	(n=254)	73%	25%	2%	100%	39%
- Fin/Prop/Bus Services	(n=124)	78%	21%	1%	100%	38%
Region						
North East	(n=98)	79%	21%	-	100%	52%
South East	(n=120)	81%	19%	1%	100%	46%
London	(n=103)	67%	32%	1%	100%	45%
Midlands	(n=120)	68%	25%	8%	100%	50%
Distance travelled						
Local (within 15 miles)	(n=253)	67%	28%	5%	100%	39%
Regional (within 50 miles)	(n=188)	89%	10%	1%	100%	64%
National / international (within and outside England and/or the UK)	(n=182)	87%	13%	-	100%	68%

Q10 In general how often does your organisation use motorways and trunk roads for business travel
Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

Due to small base sizes (n=less than 80) the following sub-groups have been excluded from analysis: sole traders, organisations with 250+ employees, retail, wholesale, North East, East and South West.

‘Frequent’ usage of the SRN (i.e. at least twice a week) was more characteristic of the larger businesses surveyed: 69% of those with 51+ employees compared to 48% of micro businesses (1-10 employees). Correspondingly, those organisations with larger turnover used the SRN on a more ‘frequent ‘basis (79% of those businesses with £5m+ turnover compared to 44% of those with £50-£250k turnover).

SRN usage was more typical of those organisations in the Retail & Distribution sector (68% using on a ‘frequent’ basis) than in Manufacturing (49%) or Services (39%). Organisations based in the South East and London were less likely to use the SRN at least twice a week compared to those operating out of other regions (46% and 45% vs. 51% national average).

The SRN was used more by those who travelled regionally or further for business than those who travelled locally: 64% of regional travellers and 68% of national / international travellers used the SRN twice a week or more compared to just 39% of ‘local’ travellers.

Overall the frequency of usage of any road was higher than the frequency of usage of the SRN (95% using any road vs. 77% using the SRN at least once a month). However, businesses surveyed with a turnover of £5m+ used the SRN to almost the same extent as they used any road (96% and 92% respectively). This is also true of those organisations that travelled nationally / internationally for business (88% and 87% respectively).

Frequency of usage of any roads compared with usage of the SRN

	Usage of any roads (weighted %)	Usage of the SRN (weighted %)
High/Medium use	95%	77%
Low use (low use/never use for SRN usage)	4%	20%
Don’t know	1%	3%
Total	100%	100%

Q9 In general how often does your organisation use the road for business travel?
Q10 In general how often does your organisation use motorways and trunk roads for business travel?
Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

Profile of businesses using any roads vs. SRN at least once a month (high/medium use)

	Base Sizes (Unweighted)	% using <u>any roads</u> at least once a month (weighted)	% using the SRN at least once a month (weighted)
Total	(n=638)	95%	77%
Business size			
Micro (1-10 employees)	(n=240)	95%	76%
- 2-10 employees	(n=180)	94%	74%
Small (11-50 employees)	(n=186)	96%	81%
Medium/Large (51+ employees)	(n=212)	95%	85%
- 51-250 employees	(n=137)	96%	84%
Turnover			
£50k-£250k	(n=178)	95%	75%
£250k-£1m	(n=110)	94%	78%
£1m-£5m	(n=192)	98%	83%
£5m+	(n=158)	96%	92%
Industry			
Manufacturing	(n=191)	95%	77%
- Production	(n=99)	92%	77%
- Construction	(n=92)	97%	76%
Retail & Distribution	(n=193)	97%	83%
Services	(n=254)	93%	73%
- Fin/Prop/Bus Services	(n=124)	91%	78%
Region			
North East	(n=98)	96%	79%
South East	(n=120)	97%	81%
London	(n=103)	87%	67%
Midlands	(n=120)	96%	68%
Distance travelled			
Local (within 15 miles)	(n=253)	97%	67%
Regional (within 50 miles)	(n=188)	99%	89%
National / international (within and outside England and/or the UK)	(n=182)	88%	87%

Q9 In general how often does your organisation use the road for business travel?

Q10 In general how often does your organisation use motorways and trunk roads for business travel?

Base size (unweighted): All who use any of the vehicles mentioned - waves 1 and 2 combined (638)

Due to small base sizes (n=less than 80) the following sub-groups have been excluded from analysis: sole traders, organisations with 250+ employees, retail, wholesale, North East, East and South West.

4. CONCLUSIONS

Awareness of all road-related terms had increased between wave 1 and wave 2, most notably recognition of 'Strategic Road Network (increased by 20%). The term 'trunk road' recorded the highest levels of awareness across both waves.

Perception of the amount of investment needed to maintain / manage England's roads was similar across both waves. Where more investment was perceived to be needed, more respondents in wave 2 felt this was required for local streets than in wave 1, with a corresponding decrease in agreement between wave 1 and wave 2 that motorways needed greater investment.

The proportion of respondents agreeing that improving transport infrastructure is important to drive economic growth was greater in wave 2 than in wave 1. The increase was particularly prevalent with regard to improving the road network (increased by 15%). The perceived importance of all drivers of economic growth increased between wave 1 and wave 2. This may reflect the more upbeat business sentiment apparent in the September wave of the Business Opinion Omnibus, as well as the wider reporting of growing business confidence.

When reviewing the combined data set (for both wave 1 and wave 2), the following conclusions can be drawn:

More than half of the respondents surveyed (56%) had some responsibility for areas relating to transport / travel within their organisations, with 2 in 5 (40%) involved in more than one area.

Larger organisations were more likely to use vehicles for business travel, along with those in the Manufacturing sector, and, to a lesser extent, those in the Retail & Distribution sector. More than a quarter of those surveyed (28%) did not use any of the vehicles listed. Larger businesses were more likely to use a wider variety of vehicles.

'Local' business trips (within 15 miles of the organisation's location) were the most common type of trip undertaken, with just under half of respondents surveyed claiming to do this (48%). National / international trips were more prevalent amongst larger organisations in terms of employee numbers and turnover.

The majority of businesses that used any of the specified vehicles (84%) used the roads for business-related trips at least twice a week. Frequency of road use is higher amongst those in the Manufacturing and Retail & Distribution sectors.

Usage of the SRN is lower than for roads in general, with around half (51%) of the businesses surveyed using it at least twice a week. SRN usage is higher amongst those travelling further afield (nationally or internationally) and amongst larger organisations, especially those in the Retail & Distribution sector. However, businesses with larger turnover (£5m+) tended to use the SRN to a similar extent they used any roads.

5. APPENDIX

Sample Profile

Structure of the Business Opinion Omnibus: DfT Sample

Wave 1: Number of respondents by size of business (unweighted)		Wave 2: Number of respondents by size of business (unweighted)	
Size	**No. of respondents**	**Size**	**No. of respondents**
1 employee (sole trader)	42	1 employee (sole trader)	41
Micro: 2-5 employees	62	**Micro:** 2-5 employees	57
6-10 employees	62	6-10 employees	64
Small: 11-50 employees	132	**Small:** 11-50 employees	130
Medium / Large: 51-250 employees	85	**Medium / Large:** 51-250 employees	86
251+ employees	44	251+ employees	44
TOTAL	**427**	**TOTAL**	**422**

Wave 1: Number of respondents by size of business (weighted %)		Wave 2: Number of respondents by size of business (weighted %)	
Size	**% of respondents**	**Size**	**% of respondents**
1 employee (sole trader)	23	1 employee (sole trader)	21
Micro: 2-5 employees	37	**Micro:** 2-5 employees	37
6-10 employees	20	6-10 employees	21
Small: 11-50 employees	16	**Small:** 11-50 employees	16
Medium / Large: 51-250 employees	4	**Medium / Large:** 51-250 employees	4
251+ employees	1	251+ employees	1
TOTAL	**100%**	**TOTAL**	**100%**

Wave 1: Number of respondents by turnover (unweighted)		Wave 2: Number of respondents by turnover (unweighted)	
Turnover	**No. of respondents**	**Turnover**	**No. of respondents**
£50k - £100k	94	£50k - £100k	87
£100k - £250k	49	£100k - £250k	30
£250k - £1m	79	£250k - £1m	77
£1m - £5m	113	£1m - £5m	131
£5m+	92	£5m+	97
TOTAL	**427**	**TOTAL**	**422**

Wave 2: Number of respondents by turnover (weighted %)		Wave 2: Number of respondents by turnover (weighted %)	
Turnover	**% of respondents**	**Turnover**	**% of respondents**
£50k - £100k	28	£50k - £100k	28
£100k - £250k	35	£100k - £250k	33
£250k - £1m	24	£250k - £1m	27
£1m - £5m	9	£1m - £5m	10
£5m+	3	£5m+	3
TOTAL	**100%**	**TOTAL**	**100%**

Wave 1: Number of respondents by sector (unweighted)		Wave 2: Number of respondents by sector (unweighted)	
Sector	**No. of respondents**	**Region**	**No. of respondents**
Manufacturing	**115**	**Manufacturing**	**106**
- Production / Agri / Mining	58	- Production / Agri / Mining	58
- Construction	57	- Construction	48
Retail & Distribution	**125**	**Retail & Distribution**	**121**
- Wholesale	45	- Wholesale	48
- Retail	48	- Retail	49
- Transport / Communications	32	- Transport / Communications	24
Services	**187**	**Services**	**195**
- Hotels & Catering	35	- Hotels & Catering	33
- Finance / Prop / Bus Services	83	- Finance / Prop / Bus Services	87
- Ed / Health / Public Admin	36	- Ed / Health / Public Admin	40
- Arts / Leisure / Other	33	- Arts / Leisure / Other	35
TOTAL	**427**	**TOTAL**	**422**

Wave 1: Number of respondents by sector (weighted %)		Wave 2: Number of respondents by sector (weighted %)	
Sector	**% of respondents**	**Sector**	**% of respondents**
Manufacturing	**27**	**Manufacturing**	**27**
- Production / Agri / Mining	12	- Production / Agri / Mining	11
- Construction	15	- Construction	16
Retail & Distribution	**29**	**Retail & Distribution**	**28**
- Wholesale	9	- Wholesale	10
- Retail	10	- Retail	10
- Transport / Communications	10	- Transport / Communications	9
Services	**44**	**Services**	**45**
- Hotels & Catering	6	- Hotels & Catering	6
- Finance / Prop / Bus Services	26	- Finance / Prop / Bus Services	26
- Ed / Health / Public Admin	6	- Ed / Health / Public Admin	5
- Arts / Leisure / Other	6	- Arts / Leisure / Other	7
TOTAL	**100%**	**TOTAL**	**100%**

Wave 1: Number of respondents by region (unweighted)		Wave 2: Number of respondents by region (unweighted)	
Region	**No. of respondents**	**Region**	**No. of respondents**
North	**100**	**North**	**114**
- North West	45	- North West	49
- North East	55	- North East	65
Midlands	**127**	**Midlands**	**105**
- East	37	- East	42
- East Midlands	42	- East Midlands	32
- West Midlands	48	- West Midlands	31
South	**200**	**South**	**203**
- South East	77	- South East	72
- South West	44	- South West	47
- London	79	- London	84
	35		
TOTAL	**427**	**TOTAL**	**422**

Wave 1: Number of respondents by region (weighted %)		Wave 2: Number of respondents by region (weighted %)	
Region	**% of respondents**	**Region**	**% of respondents**
North	**20**	**North**	**24**
- North West	9	- North West	13
- North East	11	- North East	12
Midlands	**32**	**Midlands**	**28**
- East	11	- East	12
- East Midlands	9	- East Midlands	7
- West Midlands	13	- West Midlands	9
South	**48**	**South**	**47**
- South East	18	- South East	18
- South West	11	- South West	10
- London	18	- London	19
TOTAL	**100%**	**TOTAL**	**100%**

Wave 1: Age and gender of respondents (unweighted)	
Age / Gender	**No. of respondents**
Age	
- 24 years or less	8
- 25-34	69
- 35-44	125
- 45-54	139
- 55-64	71
- 65 years or older	15
Gender	
- Male	250
- Female	177
TOTAL	**427**

Wave 2: Age and gender of respondents (unweighted)	
Age / Gender	**No. of respondents**
Age	
- 24 years or less	9
- 25-34	71
- 35-44	89
- 45-54	154
- 55-64	77
- 65 years or older	22
Gender	
- Male	266
- Female	156
TOTAL	**422**

Wave 1: Age and gender of respondents (weighted %)	
Age / Gender	**% of respondents**
Age	
- 24 years or less	2
- 25-34	13
- 35-44	18
- 45-54	43
- 55-64	20
- 65 years or older	5
Gender	
- Male	68
- Female	32
TOTAL	**100%**

Wave 2: Age and gender of respondents (weighted %)	
Age / Gender	**% of respondents**
Age	
- 24 years or less	2
- 25-34	15
- 35-44	14
- 45-54	45
- 55-64	19
- 65 years or older	5
Gender	
- Male	68
- Female	32
-	
TOTAL	**100%**

Structure of the Business Opinion Omnibus: DfT Sample – Waves 1 and 2 combined

Number of respondents by size of business (unweighted)		Number of respondents by turnover (unweighted)	
Size	**No. of respondents**	**Turnover**	**No. of respondents**
1 employee (sole trader)	83	£50k - £100k	181
Micro: 2-5 employees	119	£100k - £250k	79
6-10 employees	126	£250k - £1m	156
Small: 11-50 employees	262	£1m - £5m	244
Medium / Large: 51-250 employees	171	£5m+	189
251+ employees	88		
TOTAL	**849**	**TOTAL**	**849**

Number of respondents by size of business (weighted %)		Number of respondents by turnover (weighted %)	
Size	**% of respondents**	**Turnover**	**% of respondents**
1 employee (sole trader)	23	£50k - £100k	28
Micro: 2-5 employees	37	£100k - £250k	34
6-10 employees	21	£250k - £1m	25
Small: 11-50 employees	16	£1m - £5m	10
Medium / Large: 51-250 employees	4	£5m+	3
251+ employees	1		
TOTAL	**100%**	**TOTAL**	**100%**

Number of respondents by sector (unweighted)		Number of respondents by region (unweighted)	
Sector	**No. of respondents**	**Region**	**No. of respondents**
Manufacturing	**221**	**North**	**214**
- Production / Agri / Mining	116	- North West	94
- Construction	105	- North East	120
Retail & Distribution	**246**	**Midlands**	**232**
- Wholesale	93	- East	79
- Retail	97	- East Midlands	74
- Transport & Communications	56	- West Midlands	79
Services	**382**	**South**	**403**
- Hotels & Catering	68	- South East	149
- Finance / Prop / Bus Services	170	- South West	91
- Ed / Health / Public Admin	76	- London	163
- Arts / Leisure / Other	68		
TOTAL	**849**	**TOTAL**	**849**

Number of respondents by sector (weighted %)		Number of respondents by region (weighted %)	
Sector	**% of respondents**	**Region**	**% of respondents**
Manufacturing	**27**	**North**	**22**
- Production / Agri / Mining	12	- North West	11
- Construction	15	- North East	11
Retail & Distribution	**29**	**Midlands**	**30**
- Wholesale	10	- East	12
- Retail	10	- East Midlands	8
- Transport / Communications	9	- West Midlands	10
Services	**45**	**South**	**47**
- Hotels & Catering	6	- South East	18
- Finance / Prop / Bus Services	26	- South West	11
- Ed / Health / Public Admin	6	- London	18
- Arts / Leisure / Other	7		
TOTAL	**100%**	**TOTAL**	**100%**

Age and gender of respondents	Age and gender of respondents

(unweighted)		(weighted %)	
Age / Gender	**No. of respondents**	**Age / Gender**	**% of respondents**
Age		**Age**	
- 24 years or less	17	- 24 years or less	2
- 25-34	140	- 25-34	11
- 35-44	214	- 35-44	21
- 45-54	293	- 45-54	41
- 55-64	148	- 55-64	20
- 65 years or older	37	- 65 years or older	5
Gender		**Gender**	
- Male	516	- Male	68
- Female	333	- Female	32
TOTAL	**849**	**TOTAL**	**100%**

Please note that due to the effects of rounding, percentages may not always add to 100%.

Technical Report

Sample for the BDRC Continental Business Opinion Omnibus is purchased on a monthly basis from Dun & Bradstreet. Quotas are set each wave for number of employees, turnover, region and sector. These quotas are as follows:

Number of employees	Number of interviews	Turnover*	Number of interviews
1 (Sole Trader)	50	£50k - £250k	120
2-5 employees	75	£250k - £500k	70
6-10 employees	75	£500k - £1m	70
11-50 employees	150	£1m - £5m	110
51-250 employees	100	£5m - £20m	85
251+ employees	50	£20m+	45
TOTAL	**500**	**TOTAL**	**500**

Sector*	Number of interviews	Region*	Number of interviews
Production / Agri / Mining	65	Scotland / Northern Ireland	55
Construction	55	North East / Yorks	55
Wholesale	55	North West / North Wales / West Midlands	80
Retail	55	East Midlands / East Anglia	80
Hotels & Catering	45	South West / South Wales	60
Transport / Communications	35	London	85
Finance / Prop / Bus Services	100	South East	85
Ed / Health / Public Admin	45		
Arts / Leisure / Other	45		
TOTAL	**500**	**TOTAL**	**500**

- + / - 5 allowed on these quotas

Quota sampling is used, which is fairly similar to *disproportionate* stratified random sampling in that the population at large is split into mutually exclusive groups (strata) and specific numbers are interviewed from each group. The primary groupings are 'number of employees' and this allows over-sampling on larger businesses, so that results for this group can be analysed, where otherwise there would be too few interviews to give robust results. Softer targets are imposed on region, sector and turnover to ensure the business population is represented, and that there are sufficient interviews to cut the data at these levels.

The sample is managed manually by the BDRC Continental fieldwork supervisors, who randomly prioritise the sample in order to meet the quotas required. This ensures that quotas are met and not exceeded unnecessarily. Some interviews are completed at the initial point of contact, with others requesting appointments / call backs at a more convenient time. All calls are screened to ensure that the respondent is the main financial decision-maker of the organisation.

Data is weighted to be representative of all businesses in the UK with a turnover of £50,000+. Data for all businesses are taken from the Business Population Estimates[4] published by the Department for Business, Innovation and Skills (BIS). The BIS data is published annually using the Inter-Departmental Business Register (IDBR), administered by the Office for National Statistics (ONS), that contains all registered businesses. The BIS data also uses ONS Labour Force Survey data, in conjunction with the HMRC self-assessment tax return data, to estimate very small businesses (with no employees) that do not appear on the IDBR. The BIS data was last updated in October 2012.

The BIS data is used for region and sector quotas. Because the BIS data covers all businesses whereas this research has excluded businesses with a turnover of less than £50,000, size quotas have been set using a combination of data sources (including ONS data on VAT registered businesses[5]) to derive the final population that this research data has been weighted to. Bigger businesses were over-sampled and then down-weighted at the analysis stage. The final sample design, once weighted, is representative of businesses with turnover £50k+. All data in this report has been weighted to national proportions.

[4] Department for Business, Innovation and Skills (BIS), 'Business Population Estimates', 2012, accessible at https://www.gov.uk/government/organisations/department-for-business-innovation-skills/series/business-population-estimates.

[5] Office for National Statistics (ONS), 'Business Demography, 2011', 13 December 2012, available at: http://www.ons.gov.uk/ons/rel/bus-register/business-demography/2011/index.html.

Weighting Profile of the Business Omnibus

Size of business (no. of employees)	% of unweighted base	% weight	Turnover	% of unweighted base	% weight
1-5	25.0%	60.7%	£50k-£250k	24.0%	63.0%
6-10	15.0%	20.3%	£250k-£1m	28.0%	25.0%
11-50	30.0%	14.8%	£1m-£5m	22.0%	9.2%
51-250	20.0%	3.7%	£5m+	26.0%	2.8%
251+	10.0%	0.5%			
TOTAL	100%	100%	TOTAL	100%	100%

Region	% of unweighted base	% weight	Sector	% of unweighted base	% weight
Scotland / Northern Ireland	11.0%	9.8%	Production/Agri/Mining	13.0%	11.6%
North East / Yorks	11.0%	9.9%	Construction	11.0%	13.7%
North West / North Wales / West Midlands	16.0%	19.6%	Wholesale	11.0%	8.7%
East Midlands / East Anglia	16.0%	17.0%	Retail	11.0%	9.9%
South West / South Wales	12.0%	11.7%	Hotels & catering	9.0%	7.1%
London	17.0%	16.1%	Transport/Communication	7.0%	9.7%
South East	17.0%	15.8%	Finance/Prop/Bus Services	20.0%	26.6%
			Ed/health/Public admin	9.0%	6.0%
			Other services	9.0%	6.7%
TOTAL	100%	100%	TOTAL	100%	100%

The Business Opinion Omnibus is weighted to be representative of all UK businesses with a turnover of £50,000+. The DfT data is filtered accordingly, and is therefore representative of all businesses in England with a turnover of £50,000+.

WAVE 1 QUESTIONNAIRE

DFT Attitudes and Behaviour towards Roads – ECONOMY QUESTION[6]
==

ASK ALL RESPONDENTS BASED IN ENGLAND ONLY (EXCLUDE NI / WALES / SCOTLAND)

ASK ALL:

Q18 Thinking about the UK economy, which of the following, if any, do you think are most important in driving growth? Please select up to 5 items.
PLEASE ROTATE CODES 1-14
PLEASE SET FOR MAX. 5 ANSWERS

Increasing private sector investment 1
Increasing international investment. 2
Growing the UK's export market 3
Improving the rail network 4
Improving the road network 5
Improving international connections (airports and ports) 6
Creating new jobs 7
Increasing levels of educations / training. 8
Helping businesses by providing grants, incentives and tax breaks 9
Encouraging consumer spending 10
I don't think growth is important 11
Don't know (DO NOT READ OUT) 12

[6] This question was asked at the beginning of the interview, while the main questions (shown on the subsequent pages) were asked later on in the interview to avoid any response bias to this question

DFT Attitudes and Behaviour towards Roads Questions
===

ASK ALL RESPONDENTS BASED IN ENGLAND ONLY (EXCLUDE NI / WALES / SCOTLAND)

Now thinking about England's roads…

ASK ALL:

Q1 Thinking about the amount of money spent on maintaining and managing England's roads, would you say: **SINGLE RESPONSE, DO NOT ROTATE**

More investment is required 1
There is sufficient investment 2
Less investment is needed? 3
(DO NOT READ OUT) Don't know.. 4

ASK ALL:

Q2 Which types of roads would you say require greater investment? Please select all that apply from this list. **MULTIPLE RESPONSE, DO NOT ROTATE**

Motorways 1
Dual carriageways.. 2
Major 'A' roads that link motorways to one another and to cities..................................... 3
Other 'A' roads 4
'B' roads or minor roads.. 5
Local streets.. 6
(DO NOT READ OUT) Don't know.. 7

ASK ALL:

Q3 How do you think funds for England's roads are currently raised? **SINGLE RESPONSE, ROTATE STATEMENTS**

Through Vehicle Excise Duty only (road tax).. 1
Through a combination of Vehicle Excise Duty (road tax) and fuel duty........................... 2
Through a combination of all road duties and charges including tolls and fines................. 3
From the Government's central budget (general taxation)... 4
Other, please specify... 5
I don't know how roads are funded 6

bdrc continental

ASK ALL:

Q4 Which of the following have you heard of? Please select all that apply. **MULTIPLE RESPONSE, ROTATE STATEMENTS**

Variable Message Sign 1
Strategic Road Network .... 2 GO TO Q4a
Route Based Planning 3
Managed Motorway Scheme 4
Active Traffic Management 5
Trunk Road 6
None of the above 7

ASK Q4a IF CODE 2 AT Q4. ALL OTHER GO TO Q5

Q4a You mentioned that you have heard of the Strategic Road Network. Please provide a brief description of what you understand the Strategic Road Network to be
INTERVIEWER NOTE: PLEASE RECORD ANY UNCERTAINTY IN RESPONSES (EG "I'M NOT SURE BUT…" OR "I ASSUME" OR "I THINK" OR "IT MIGHT BE" ETC

____

____

____

The following questions are about your organisation's travel and transport use

ASK ALL:

Q5 In your company, are you responsible for procurement, management or policy decisions about any of the following areas? Please select all that apply. **MULTICODE RESPONSE, DO NOT ROTATE**

Logistics / distribution 1
Company vehicles 2
Company travel policies 3
Freight/haulage 4
Other travel / transport issues (please specify) 5
None of the above 6

ASK ALL:

Q6 Which of the following types of vehicles are used by employees in your organisation when travelling for business? (By business travel I mean all travel except commuting to / from the employee's main place of work). **MULTICODE, DO NOT ROTATE**

Company owned / leased heavy goods vehicles 1
Company owned / leased light goods vehicles or vans 2
Company owned / leased fleet or pool cars 3
Privately owned cars / vans 4
None of the above 5
Don't know (DO NOT READ OUT) 6

ASK ALL:

Q7 Roughly how many company owned or leased vehicles does your company have continuous use of at present? **SINGLE, OPEN RESPONSE**

1 1
2-5 2
6-10 3
11-20 4
21-50 5
51-100 6
101-250 7
251-500 8
501-1000 9
1001+ 10
None 11
Don't know (DO NOT READ OUT) 12

ASK ALL:

Q8 Would you say that road trips made by your organisation are typically… **READ OUT.SINGLE CODE**

Local (within 15 miles of where your main site is located) 1
Regional (within 50 miles of where your main site is located) 2
National (within England and/or the UK) 3
International (within and outside England and/or the UK) 4
Other (please specify) 5
Don't know (DO NOT READ OUT) 6

ASK ALL:

Q9 In general, how often does your organisation use the road for business travel? **SINGLE CODE, DO NOT ROTATE**

At least twice a week 1
Between once a week and once a month... 2
Less than once a month but more than once a year 3
Less than once a year 4
My organisation does not use the road for business travel 5
Don't know (DO NOT READ OUT).. 6

The following questions relate to the Strategic Road Network. This is England's core, national road network which consists of motorways and trunk roads. Trunk roads are major 'A' roads but do not include all 'A' roads. Trunk roads tend to link motorways to each other, or to major cities and ports.

Trunk roads in your area that are part of the network include: (INTERVIEWER TO READ LIST OF A ROADS IN THE VICINITY OF THE ORGANISATION'S LOCATION. UP TO 10 CODES)

The Strategic Road Network is managed separately from other roads in England.

ASK ALL:

Q10 In general, how often does your organisation use motorways and trunk roads for business travel? **SINGLE CODE, DO NOT ROTATE**
INTERVIEWER: IF RESPONDENT IS UNSURE, PROBE FOR BEST ESTIMATE

At least twice a week 1
Between once a week and once a month... 2
Less than once a month but more than once a year 3
Less than once a year 4
My organisation does not use these strategic roads for business travel........... 5
Don't know (DO NOT READ OUT).. 6

ASK ALL:

Q11 **Interviewer to remind respondents:**

The SRN is England's core network of motorways and trunks roads that links major cities to one another and to ports.

Please use the scale below to indicate the impact of the Strategic Road Network on your organisation's ability to conduct its day-to-day business? Scale of 1-10 where:

1 = The Strategic Road Network does not have much impact on the organisation's ability to do business.. 1
2.. 2
3.. 3
4.. 4
5.. 5
6.. 6
7.. 7
8.. 8
9.. 9
10 = The organisation could not operate effectively without using the Strategic Road Network 10

ASK ALL:

Q12 How important is it for you to know about news and developments relating to the Strategic Road Network when planning for your business?
SINGLE CODE, DO NOT ROTATE

Not at all important.. 1
Not important.. 2
Somewhat important.. 3
Very important.. 4
Don't know (DO NOT READ OUT).. 5

ASK ALL:

Q13 Some people think it is important to make sure there is enough investment in the Strategic Road Network. Which of the following reasons for investment, if any, are important to you? Please select up to five things that are most important to you.
MULTICODE RESPONSE, ROTATE STATEMENTS

To aid long-term road planning.. 1
To allow goods to move across the country efficiently.. 2
To support economic growth.. 3
To facilitate job creation.. 4 **GO TO Q14**
To prevent deterioration of the Network.. 5
To ensure road standards in England compare with those in other European countries.... 6
To maintain safety standards.. 7
To make sure the network meets modern standards.. 8
Other (please specify).. 9
I don't think it is important to invest in the Strategic Road Network.. 10
Don't know (DO NOT READ OUT).. 11

ASK Q14 IF CODE 4 AT Q13. ALL OTHERS GO TO Q15

Q14 Which of the following do you think is the most important way that investment in the Strategic Road Network can facilitate job creation?
SINGLE RESPONSE, ROTATE STATEMENTS

By making it easier for people to access available jobs 1
By creating more jobs in road construction and maintenance 2
By ensuring the UK is attractive to foreign businesses 3
By ensuring businesses can operate effectively 4
By encouraging businesses to locate their operations in areas with high unemployment .. 5
Other, please specify 6

ASK ALL:

Q15 If additional funds were available **for motorways** which of the following do you think it should be used for? Please select up to five things that are most important to you.
MULTICODE RESPONSE, ROTATE STATEMENTS

Improve the speed of repairs / road works 1
Improve the quality of the road surface 2
Widen the motorways 3
Better general maintenance (eg litter removal, grass / foliage cutting, drainage, lighting).. 4
Improve safety 5
Improve traffic flow / reduce congestion 6
Build new motorways 7
Reduce journey times 8
Make journey times more predictable 9
Improve the way accidents / delays are handled 10
Improve real-time information 11
Other, please specify 12
Don’t know (DO NOT READ OUT) 13

ASK ALL:

Q16 If additional funds were available **for trunk roads** which of the following do you think it should be used for? Please select up to five things that are most important to you.
MULTICODE RESPONSE, ROTATE STATEMENTS

Improve the speed of repairs / road works 1
Improve the quality of the road surface 2
Widen the roads 3
Better general maintenance (eg litter removal, grass / foliage cutting, drainage, lighting).. 4
Improve safety... 5
Improve traffic flow / reduce congestion 6
Build new roads... 7
Reduce journey times.. 8
Make journey times more predictable... 9
Improve the way accidents / delays are handled 10
Improve real-time information 11
Other, please specify.. 12
Don't know (DO NOT READ OUT).. 13

ASK ALL:

Q17 Thinking about **<u>all roads</u>** that you use, how do you prefer to find out about news or developments relating to roads? Please select all that apply.
MULTICODE RESPONSE, ROTATE STATEMENTS

Local / national newspapers 1
Broadcast media (TV, radio) 2
Online news sites (e.g. Sky News, Guardian Online)... 3
Social network sites (e.g. Facebook, Twitter) 4
Motoring groups (e.g. the AA, the RAC)... 5
The Highways Agency.. 6
The Department for Transport.. 7
Local Government 8
Road signs.. 9
DVLA / VOSA... 10
Trade magazines.. 11
Trade associations / professional bodies 12
Trade Unions.. 13
Other, please specify.. 14
I don't find out about news or developments relating to roads 15
Don't know (DO NOT READ OUT).. 16

DFT Attitudes and Behaviour towards Roads– ECONOMY QUESTION[7]
===

ASK ALL RESPONDENTS BASED IN ENGLAND ONLY (EXCLUDE NI / WALES / SCOTLAND)

ASK ALL:

Q18 Thinking about the UK economy, which of the following, if any, do you think are most important in driving growth? Please select up to 5 items.
PLEASE ROTATE CODES 1-10
PLEASE SET FOR MAX. 5 ANSWERS

Increasing private sector investment 1
Increasing international investment........ 2
Growing the UK's export market 3
Improving the rail network 4
Improving the road network 5
Improving international connections (airports and ports) 6
Creating new jobs 7
Increasing levels of educations / training........ 8
Helping businesses by providing grants, incentives and tax breaks 9
Encouraging consumer spending 10
I don't think growth is important 11
Don't know (DO NOT READ OUT) 12

[7] This question was asked at the beginning of the interview, while the main questions (shown on the subsequent pages) were asked later on in the interview to avoid any response bias to this question

DFT Attitudes and Behaviour towards Roads Questions
===

ASK ALL RESPONDENTS BASED IN ENGLAND ONLY (EXCLUDE NI / WALES / SCOTLAND)

Now thinking about England's roads…

ASK ALL:

Q1 Thinking about the amount of money spent on maintaining and managing England's roads, would you say: **SINGLE RESPONSE, DO NOT ROTATE**

More investment is required 1
There is sufficient investment 2
Less investment is needed? 3
(DO NOT READ OUT) Don't know.. 4

ASK ALL:

Q2 Which types of roads would you say require greater investment? Please select all that apply from this list. **MULTIPLE RESPONSE, DO NOT ROTATE**

Motorways 1
Dual carriageways.. 2
Major 'A' roads that link motorways to one another and to cities.. 3
Other 'A' roads 4
'B' roads or minor roads.. 5
Local streets.. 6
(DO NOT READ OUT) Don't know.. 7

ASK ALL:

Q4 Which of the following have you heard of? Please select all that apply. **MULTIPLE RESPONSE, ROTATE STATEMENTS**

Variable Message Sign 1
Strategic Road Network.. 2
Route Based Planning.. 3
Managed Motorway Scheme 4
Active Traffic Management.. 5
Trunk Road 6
None of the above 7

The following questions are about your organisation's travel and transport use

ASK ALL:

Q5 In your company, are you responsible for procurement, management or policy decisions about any of the following areas? Please select all that apply. **MULTICODE RESPONSE, DO NOT ROTATE**

Logistics / distribution 1
Company vehicles 2
Company travel policies.. 3
Freight/haulage 4
Other travel / transport issues (please specify)... 5
None of the above 6

ASK ALL:
Q6 Which of the following types of vehicles are used by employees in your organisation when travelling for business? (By business travel I mean all travel except commuting to / from the employee's main place of work). **MULTICODE, DO NOT ROTATE**

Company owned / leased heavy goods vehicles 1
Company owned / leased light goods vehicles or vans.. 2
Company owned / leased fleet or pool cars... 3
Privately owned cars / vans 4
None of the above – we use another type of vehicle 5
None of the above – my organisation does not travel by road for business........... 6
(IF CODE 6 SKIP TO NEXT SECTION)

Don't know (DO NOT READ OUT)... 7

ASK ALL WHO MAKE ROAD TRIPS (ALL EXCEPT CODE 6 AT Q6)

Q8 Would you say that road trips made by your organisation are typically… **READ OUT. SINGLE CODE**

Local (within 15 miles of where your main site is located)..................................... 1
Regional (within 50 miles of where your main site is located) 2
National (within England and/or the UK) 3
International (within and outside England and/or the UK) 4
Other (please specify) 5
Don't know (DO NOT READ OUT)... 6

ASK ALL WHO MAKE ROAD TRIPS (ALL EXCEPT CODE 6 AT Q6)

Q9 In general, how often does your organisation use the road for business travel? **SINGLE CODE, DO NOT ROTATE**

At least twice a week 1
Between once a week and once a month........ 2
Less than once a month but more than once a year........ 3
Less than once a year 4
Don't know (DO NOT READ OUT)........ 6

ASK ALL WHO MAKE ROAD TRIPS (ALL EXCEPT CODE 6 AT Q6)

The following question relates to the Strategic Road Network. This is England's core, national road network which consists of motorways and trunk roads. Trunk roads are major 'A' roads but do not include all 'A' roads. Trunk roads tend to link motorways to each other, or to major cities and ports.

Trunk roads in your area that are part of the network include: (INTERVIEWER TO READ LIST OF A ROADS IN THE VICINITY OF THE ORGANISATION'S LOCATION. UP TO 10 CODES)

The Strategic Road Network is managed separately from other roads in England.

Q10 In general, how often does your organisation use motorways and trunk roads for business travel? **SINGLE CODE, DO NOT ROTATE**
INTERVIEWER: IF RESPONDENT IS UNSURE, PROBE FOR BEST ESTIMATE

At least twice a week 1
Between once a week and once a month........ 2
Less than once a month but more than once a year........ 3
Less than once a year 4
My organisation does not use these strategic roads for business travel........ 5
Don't know (DO NOT READ OUT)........ 6