Business attitudes to Roads in England

Wave 1

September 2013

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providing *intelligence*

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1. Introduction

Background & Methodology

The Department for Transport (DfT) commissioned a questionnaire to be included on the June 2013 wave of the BDRC Continental Business Opinion Omnibus. The Business Opinion Omnibus is a quantitative telephone-based 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.

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

Research Objectives

The objective of the research was to investigate 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 / number of vehicles used, and nature / frequency of trips

- Examine attitudes towards investment in roads and understand priorities for businesses in this area

- Determine awareness and usage of / attitudes towards the SRN, and assess how this varies across different business types and sectors
- Understand how transport (in general) and roads (specifically) are perceived in the context of wider economic growth.

Key demographics and categories used:

Variable	Category	Base size (Unweighted)
Business size	Micro (1-10 employees)	166
	Small (11-50 employees)	132
	Medium/large (51+ employees)	129
Turnover	£50k - £100k	94
	£100k - £1m	128
	£1m - £5m	113
	£5m+	92
Industry	Manufacturing (Production; Construction)	115
	Retail and Distribution (Wholesale; Retail; Transport and Communications)	125
	Services (Hotels and Catering; Financial, Property and Business Services; Education, Health and Public Administration; Art, Leisure & Other)	187
Number of company owned or leased vehicles the organisation has continuous use of	None	230
	1-5	95
	6-50	85
	51+	10*
	Don't know	7*
Company has continuous use of company owned/leased vehicle?	Yes	190
	No	230
	Don't know	7*
Frequency of any road use by organisation for business travel	High/medium use (at least once a month)	379
	Low/no use (less than once a month)	42
	Don't know	6*
	Frequent users (high/medium user who uses the road twice a week or more)[1]	339
Frequency of SRN use	High/medium use (at least once a month)	304
	Low/no use (less than once a month)	105
	Don't know	18*
	Frequent user (high/medium user who uses the road twice a week or more)[2]	239

[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.

Variable	Category	Base size (Unweighted)
Distance travelled	Local (within 15 miles of the main site)	175
	Regional (within 50 miles of the main site)	108
	National / international (within and outside England and/or the UK)	94
	Organisation does not make any road trips for business travel	33*
	Don't know	17*

*caution – small bases

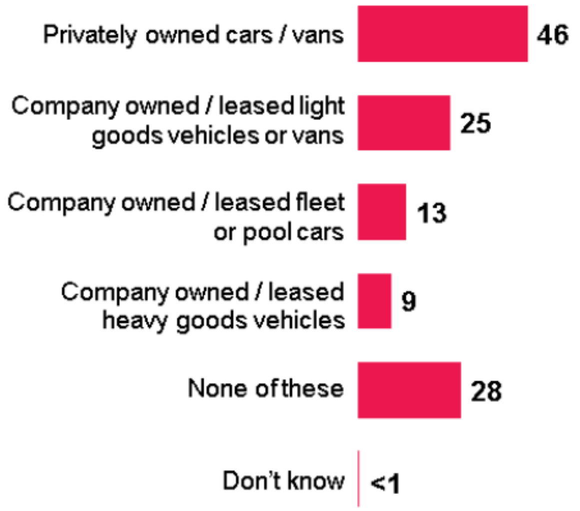
Please note that due to the effects of rounding, percentages may not always add to 100%.

2. Vehicle and Road Use

This section of the report discusses the profile of the respondents in terms of business trips undertaken, incorporating vehicle usage, frequency, and distance of trips.

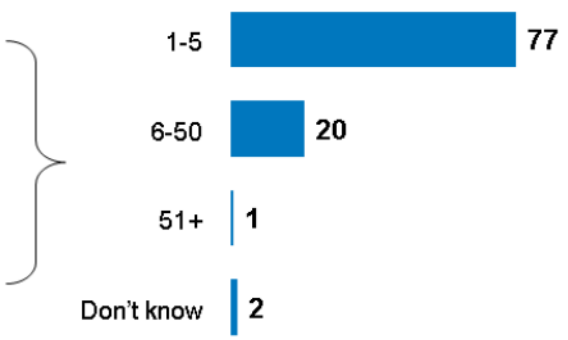
Vehicles usage

Type 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 (427)

Number of company owned / leased vehicles that company has continuous use of (%)



Q7 Roughly how many company owned or leased vehicles does your company have continuous use of at present?
Base size (unweighted): Those organisations whose employees use a company owned or leased vehicle for business (197)

Employees in around 7 in 10 businesses (72%) use one or more types of vehicles when travelling for business, with use of privately owned cars / vans being most common (used by 46% of businesses). Just 9% use heavy goods vehicles.

Company owned or leased vehicles are used by 36% of businesses. Of these, three quarters (77%) have continuous use of between one and five such vehicles, while a fifth (20%) have between six and fifty.

In terms of the profile of businesses, those with higher turnover are more likely to use any vehicles for employee business travel (for example, 71% of those with £50k-£100k turnover use any vehicle compared to 87% of businesses with £5m+ turnover). Businesses in the manufacturing sector are significantly more likely to use one or more vehicles for employee business travel (93%) than those in Retail/Distribution or Services (70% and 61% respectively).

Profile of businesses that use specified vehicles for employee business travel

	Base Sizes (Unweighted)	Use any specified vehicles for business travel?			Total
		Yes (weighted %)	No (weighted %)	Don't know (weighted %)	
Total	(n=427)	72%	28%	-	100%
Business size					
Micro (1-10 employees)	(n=166)	72%	28%	-	100%
Small (11-50 employees)	(n=132)	73%	27%	-	100%
Medium/Large (51+ employees)	(n=129)	75%	22%	3%	100%
Turnover					
£50k-£100k	(n=94)	71%	29%	-	100%
£100k-£1m	(n=128)	72%	28%	-	100%
£1m-£5m	(n=113)	72%	28%	1%	100%
£5m+	(n=92)	87%	11%	2%	100%
Industry					
Manufacturing	(n=115)	93%	7%	<1%	100%
Retail & Distribution	(n=125)	70%	30%	-	100%
Services	(n=187)	61%	39%	-	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 (427)

As shown in the tables on the following page, larger businesses (both in terms of the number of employees and turnover) are more likely to use more than one type of vehicle for employee business travel and to use company owned/leased fleet or pool cars.

Diversity of vehicles used by business profile

	Base Sizes (Unweighted)	Diversity of vehicles used: 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=427)	28%	55%	11%	5%	<1%	100%
Business size							
Micro (1-10 employees)	(n=166)	28%	56%	11%	5%	-	100%
Small (11-50 employees)	(n=132)	27%	53%	14%	6%	-	100%
Medium/large (51+ employees)	(n=129)	22%	46%	18%	11%	3%	100%
Turnover							
£50k-£100k	(n=94)	29%	64%	1%	7%	-	100%
£100k-£1m	(n=128)	28%	54%	15%	3%	-	100%
£1m-£5m	(n=113)	28%	50%	14%	9%	1%	100%
£5m+	(n=92)	11%	33%	28%	26%	2%	100%
Industry							
Manufacturing	(n=115)	7%	72%	11%	10%	<1%	100%
Retail & Distribution	(n=125)	30%	45%	19%	6%	-	100%
Services	(n=187)	39%	52%	7%	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 (427)

Which businesses use which types of vehicles for business travel?

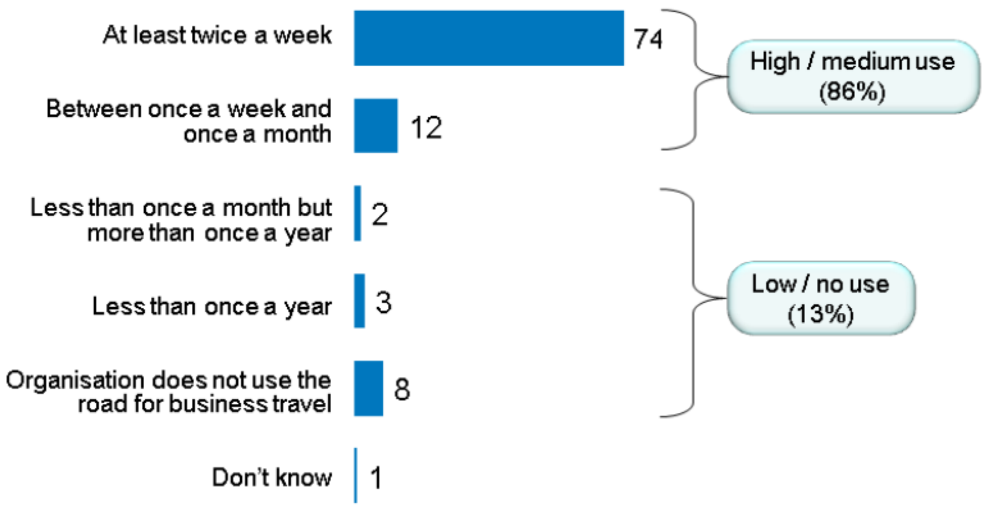
	Base Sizes (Unweighted)	Vehicle Type: Privately owned cars / vans (weighted %)	Company owned / leased light goods vehicles or vans (weighted %)	Company owned / leased fleet or pool cars (weighted %)	Company owned / leased heavy goods vehicles (weighted %)
Total	(n=427)	46%	25%	13%	9%
Business size					
Micro (1-10 employees)	(n=166)	48%	24%	12%	8%
Small (11-50 employees)	(n=132)	38%	30%	19%	12%
Medium/large (51+ employees)	(n=129)	44%	32%	26%	18%
Turnover					
£50k-£100k	(n=94)	52%	16%	7%	11%
£100k-£1m	(n=128)	44%	28%	14%	8%
£1m-£5m	(n=113)	40%	33%	19%	11%
£5m+	(n=92)	52%	50%	50%	24%
Industry					
Manufacturing	(n=115)	49%	44%	17%	14%
Retail & Distribution	(n=125)	42%	31%	19%	10%
Services	(n=187)	47%	10%	8%	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*.
'None' and 'Don't know' not shown here (as shown in previous table)
Base size (unweighted): All respondents (427)

Frequency of business-related road usage

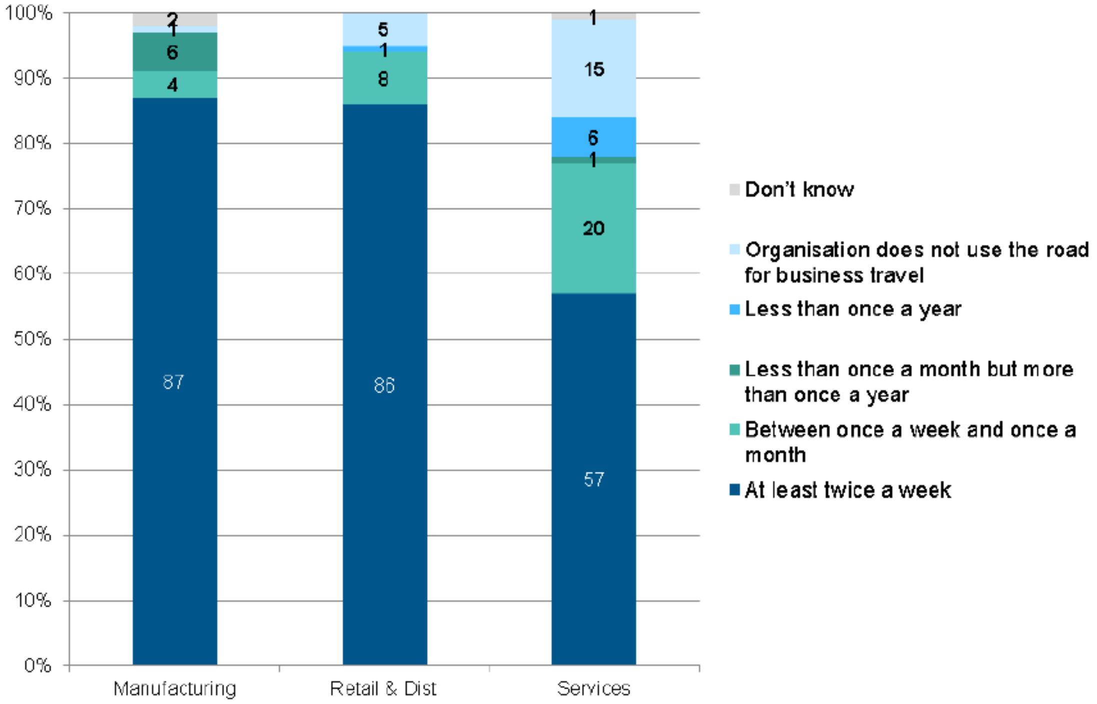
As shown, 74% of companies use the roads for business-related trips at least twice a week. This is more prevalent amongst those in Manufacturing (87%) and Retail & Distribution (86%) than those in the Service industry (57%). Only a very small number are undertaking road trips less than once a month (5%) with a further 8% saying their organisation does not use the roads at all for business travel.

Frequency of business-related road usage (%)



Q9 In general how often does your organisation use the road for business travel?
Base size (unweighted): All respondents (427)

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

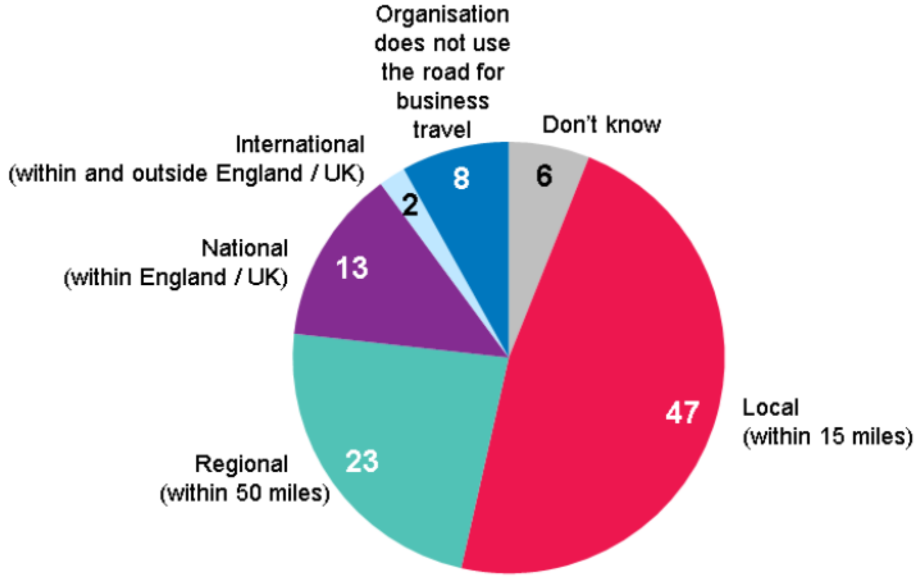


Q9 In general how often does your organisation use the road for business travel?
Base size (unweighted): All respondents (427)

Type of business-related road trip

Just under a half of businesses typically make local road trips (defined as within 15 miles of their location). A further quarter (23%) typically travel more regionally (within a 50 mile radius). Only 15% of business travel further afield. Local trips are more characteristic of those in Manufacturing industries (59%), while trips amongst Retail & Distribution businesses are likely to be either local or regional (38% and 34% respectively).

Distance of typical road trips undertaken (%)



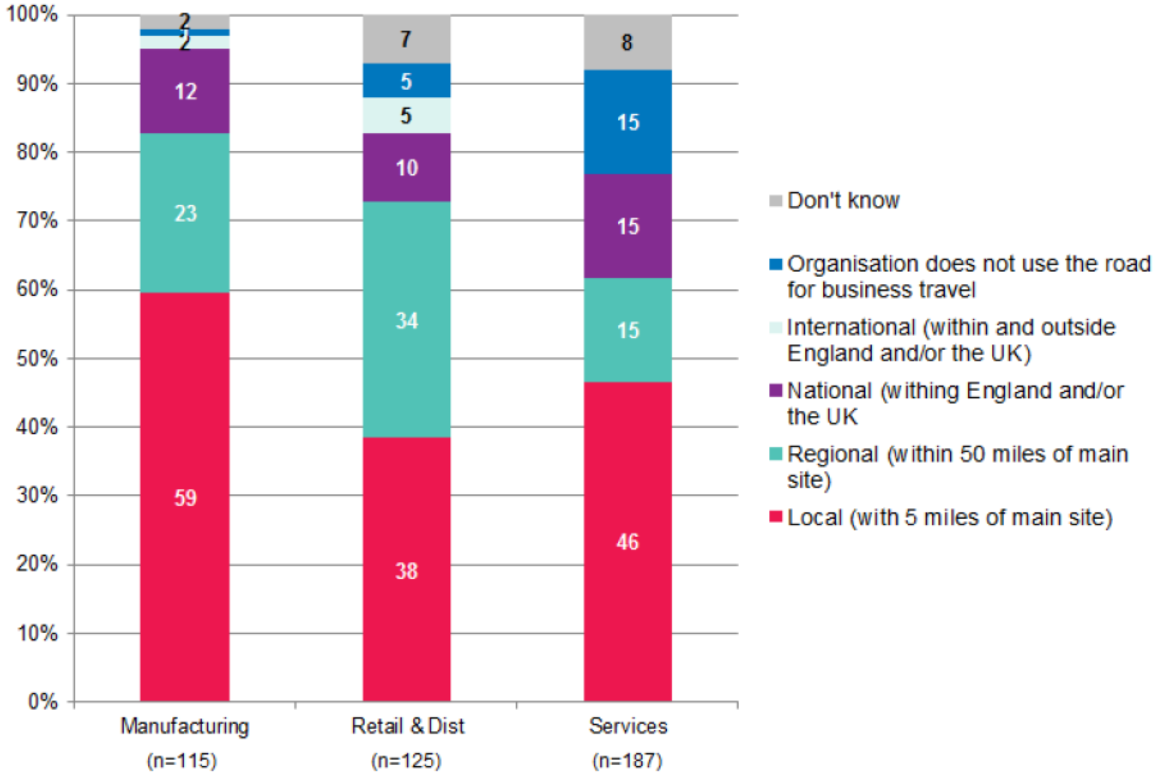
Q8 Would you say that road trips made by your organisation are typically…
Base size (unweighted): All respondents (427)

Frequency of business-related road trips by typical trip distance

	Local (within 15 miles) (weighted %)	Regional (within 50 miles) (weighted %)	National / International (within and outside England and/or the UK) (weighted %)
Base size	(n=175)	(n=108)	(n=94)
Frequency of any road use			
High/medium use	97%	98%	79%
Low/no use	3%	2%	21%
Don't know	<1%	<1%	<1%
Total	100%	100%	100%
Frequent users (high/medium users who use the road twice a week or more)	82%	87%	74%

Q9 in general, how often does your organisation use the road 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 (427)

Type of road trips undertaken by industries (%)



Q8 Would you say that road trips made by your organisation are typically…
Base size (unweighted): All respondents (427) NB: Unweighted bases shown above for each sub-group

3. The Strategic Road Network (SRN)

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

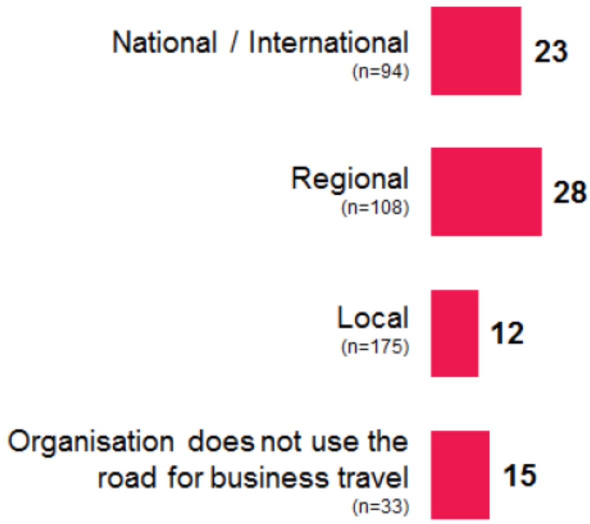
Before hearing the description of the Strategic Road Network, respondents were asked whether they had heard of the term. Overall, awareness levels were low with only 17% of businesses claiming to have heard of the term 'Strategic Road Network'.

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 (427)

Of the 6 'road-related' terms that respondents were asked about (as shown in the chart above), 'trunk road' received the highest recognition, recalled by half (49%).

Awareness of the SRN is higher amongst businesses who take regional or national road trips for business, than those who make local ones or no road trips.

Awareness of SRN by typical trip distance (%)



Q4. Which of the following have you heard of? SRN
Please note that for this question, respondents were able to select *as many options as were applicable*
Base size (unweighted): All respondents (427) NB: Unweighted bases shown above for each sub-group

Awareness of the SRN is fairly similar between businesses by size (based on number of employees) and industry. Businesses with a turnover of £5m+ are most likely to be aware of the SRN (30% aware) compared to those with lower turnover (20% aware or less). In all cases, awareness of the SRN is lower than awareness of trunk roads.

Who is aware of the SRN and Trunk Roads?

	Base sizes (unweighted)	% Aware of the SRN (weighted%)	% Aware of Trunk roads (weighted%)
Total	(n=427)	17%	49%
Business size			
Micro (1-10 employees)	(n=166)	17%	50%
Small (11-50 employees)	(n=132)	17%	47%
Medium/large (51+ employees)	(n=129)	18%	43%
Turnover			
£50k-£100k	(n=94)	20%	39%
£100k-£1m	(n=128)	15%	53%
£1m-£5m	(n=113)	18%	50%
£5m+	(n=92)	30%	55%
Industry			
Manufacturing	(n=115)	19%	39%
Retail & Distribution	(n=125)	15%	52%
Services	(n=187)	17%	53%

Q4 Which of the following have you heard of? SRN; Trunk Road
Please note that for this question, respondents were able to select *as many options as* ***were applicable***
Base size (unweighted): All respondents (427)

Understanding of SRN

The 17% of respondents who had heard of the Strategic Road Network were asked to provide a brief description of what they understood the SRN to be. At least half of them were able to provide a partially accurate description. A number thought that it comprised of major roads/motorways/important roads. Some went further by stating that the network links key cities/towns. However, 1 in 4 (23%) were unable to give a definition, including 16% claiming to have heard of it but not to know or understand what it is.

	Weighted %
Major routes/roads/motorways/dual carriageways	**32%**
Main roads/trunk roads to the cities/main roads connecting cities/towns junctions	16%
Major route/roads/motorways/dual carriageways	14%
Main roads/trunk roads/'A' roads	1%
National road networks/roads	1%
Major roads/routes	1%
Links/Connections	**19%**
Strategic roads	7%
Linkage to all roads/main links in the road system/connects different roads/how the roads join	7%
Most important roads	6%
Road systems/networks to get from 'A' to 'B'	6%
Links/connections	6%
Roads to get you around the country from one end of the country to the other/to all areas	2%
Road/Traffic Management	**7%**
Just heard of it/heard the name/seen name	**16%**
Other	**27%**
Don't know	**7%**

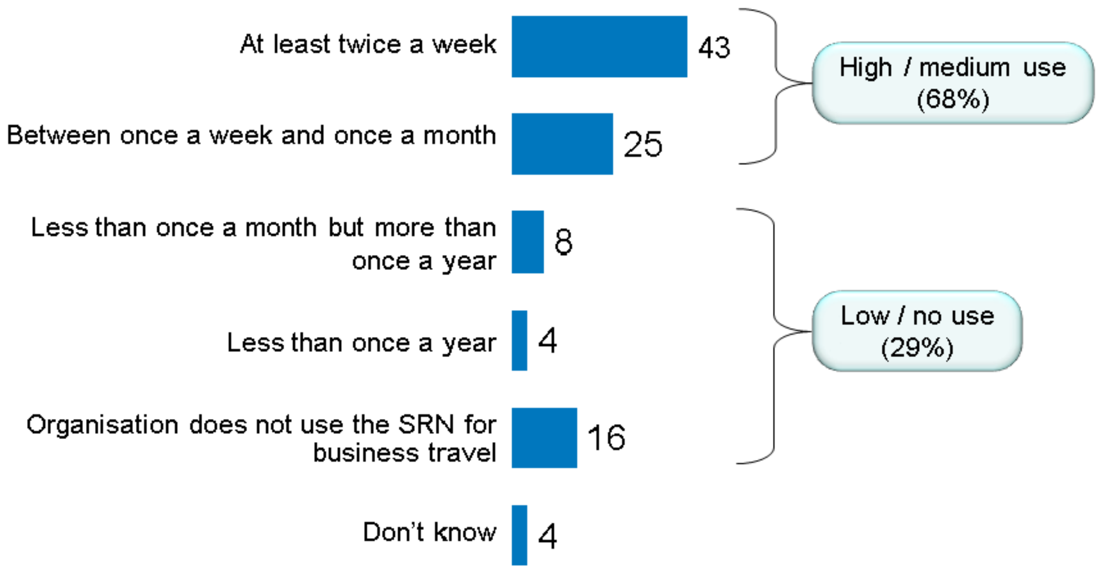
Q4a. You mentioned that you have heard of the Strategic Road Network. Please provide a brief description of what you understand the Strategic Road Network to be.
Please note that this was an open-ended question and respondents were asked to give as much detail as possible. Answers were coded afterwards.
Base size (unweighted): All who have heard of the Strategic Road Network (79)

Usage of SRN

After respondents were prompted with a description of the SRN, and a list of roads in the vicinity of their organisation, 76% of respondents reported that their employees had used the SRN at least once in the past 12 months for business travel. Around 2 in 5 (43%) of businesses use the SRN on a 'frequent' basis (i.e. at least twice a week). As shown in the table on the following page, frequent usage is more apparent amongst businesses who typically travel outside their local area on business-related road trips (68% of those making regional trips; 65% of those making national / international trips)

Just over two thirds of businesses (68%) are defined as high / medium users of the SRN (i.e. use it at least once a month), while 29% use it less often or not at all.

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 respondents (427)

Profile of businesses using the SRN for business travel

	Usage of SRN					
	Base Sizes (Unweighted)	High/Med (weighted %)	Low/No (weighted %)	Don't Know (weighted %)	Total	Frequent (high/medium users who use the road twice a week or more) (weighted %)
Total	(n=427)	68%	29%	4%	100%	43%
Business Size						
Micro (1-10 employees)	(n=166)	66%	30%	4%	100%	38%
Small (11-50 employees)	(n=132)	73%	23%	4%	100%	63%
Medium / large (51+ employees)	(n=129)	76%	18%	6%	100%	64%
Turnover						
£50k-£100k	(n=94)	61%	36%	3%	100%	38%
£100k-£1m	(n=128)	70%	27%	3%	100%	41%
£1m-£5m	(n=113)	68%	26%	7%	100%	57%
£5m+	(n=92)	95%	5%	-	100%	88%
Industry						
Manufacturing	(n=115)	69%	22%	10%	100%	37%
Retail & Distribution	(n=125)	80%	19%	1%	100%	67%
Services	(n=187)	59%	39%	2%	100%	30%
Distance travelled						
Local (within 15 miles)	(n=175)	65%	29%	6%	100%	33%
Regional (within 50 miles)	(n=108)	93%	7%	<1%	100%	68%
National / international (within and outside England and/or the UK)	(n=94)	78%	22%	<1%	100%	65%

Q10 In general how often does your organisation use motorways and trunk roads for business travel
Base size (unweighted): All respondents (427)

Profile of each SRN usage group

High/medium users are more likely to be / include:

- Businesses with a turnover of £5m and over;
- In the Retail & Distribution sector;
- Businesses making regional trips.

As a sub-group of High/medium users, 'Frequent users' have a very similar profile:

- Businesses with a turnover of £5m and over;
- In the Retail & Distribution sector;
- Businesses making regional and national/international trips.

Low/no users are more likely to be / include:

- Smaller sized businesses;
- Businesses with a turnover of £50k-£100k;
- In the Services sector;
- Businesses making local trips.

Overall the frequency of usage of any road is higher than the frequency of usage of the SRN (86% using any road vs. 68% using the SRN at least once a month). However, businesses with a turnover of £5m+ use the SRN to the same extent as any road (95% and 97% 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	86%	68%
Low/No use	13%	29%
Don't know	1%	4%
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 respondents (427)

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

	Base Sizes (Unweighted)	% using any roads at least once a month	% using the SRN at least once a month
Total	427	86%	68%
Business size			
Micro (1-10 employees)	(n=166)	85%	66%
Small (11-50 employees)	(n=132)	89%	73%
Medium/ large (51+ employees)	(n=129)	91%	76%
Turnover			
£50k-£100k	(n=94)	84%	61%
£100k-£1m	(n=128)	86%	70%
£1m-£5m	(n=113)	87%	68%
£5m+	(n=92)	97%	95%
Industry			
Manufacturing	(n=115)	91%	69%
Retail & Distribution	(n=125)	94%	80%
Services	(n=187)	77%	59%

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 respondents (427)

Frequency of business-related road trips by distance travelled

	Local (within 15 miles) (weighted %)	Regional (within 50 miles) (weighted %)	National / International (within and outside England and/or the UK) (weighted %)
Base size	(n=175)	(n=108)	(n=94)
Frequency of any road use			
High/medium use	97%	98%	79%
Low/no use	3%	2%	21%
Don't know	<1%	<1%	<1%
Total	100%	100%	100%
Frequent users (high/medium users who use the road twice a week or more)	82%	87%	74%
Frequency of SRN use			
High/medium use	65%	93%	78%
Low/no use	29%	7%	22%
Don't know	6%	<1%	<1%
Total	100%	100%	100%
Frequent users (high/medium users who use the road twice a week or more)	33%	68%	65%

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 respondents (427)

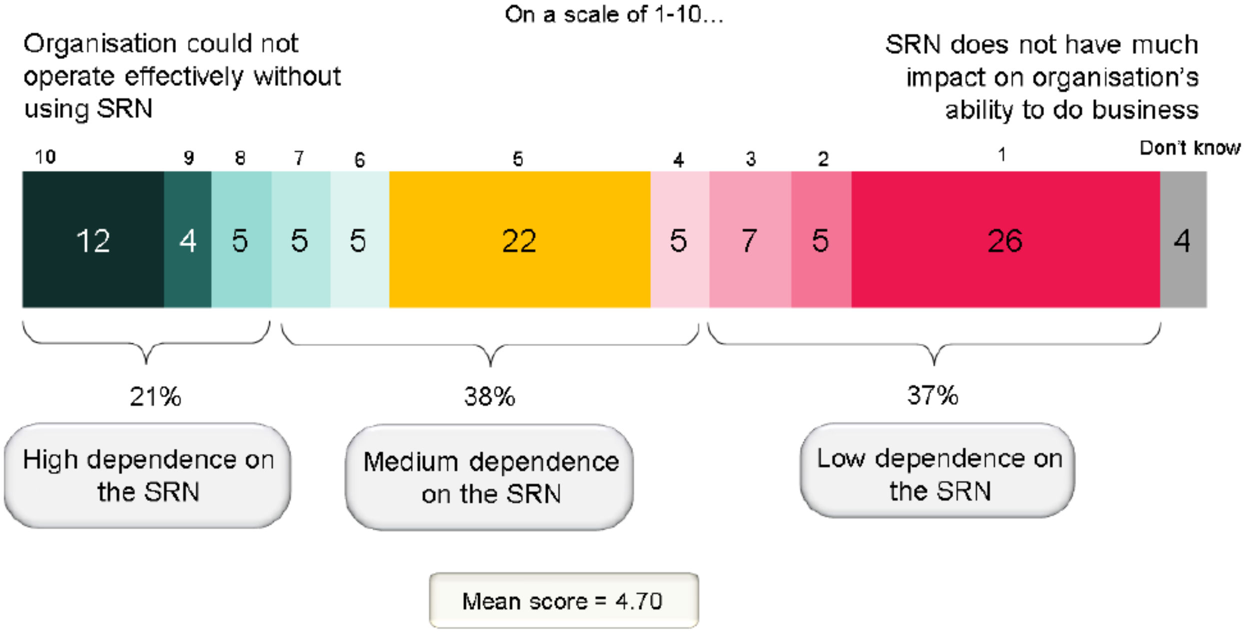
Dependence on the SRN

Respondents were asked to signify the impact of the SRN on their organisation's ability to conduct business on a scale of 1-10. More than 1 in 10 respondents (12%) felt that their organisation *"could not operate effectively without using the SRN"* (score 10). This attitude is more apparent amongst businesses:

- with a turnover of £5m+
- in the Retail & Distribution industry
- with continuous use of company owned / leased vehicles
- typically making regional business-related road trips
- that use roads in general, and the SRN in particular, at least once a month
- established before 1980

At the other end of the scale are those businesses who stated "The SRN does not have much impact on the organisation's ability to do business" (score=1), which accounts for 1 in 4 respondents (26%).

Impact of the SRN on the organisation's ability to conduct its daily business (%)



Q11 Please use the scale to indicate the impact of the Strategic Road Network on your organisation's ability to conduct its day-to-day business?
Base size (unweighted): All respondents (427)

Who is dependent on the SRN to conduct business?

	Base Sizes (Unweighted)	Dependence on the SRN				
		Score 1-3 Low dependence (weighted %)	Score 4-7 Medium dependence (weighted %)	Score 8-10 High dependence (weighted %)	Don't Know	Total
Total	(n=427)	37%	38%	21%	4%	100%
Business size						
Micro (1-10 employees)	(n=166)	39%	37%	20%	4%	100%
Small (11-50 employees)	(n=132)	30%	39%	27%	4%	100%
Medium/large (51+ employees)	(n=129)	29%	35%	28%	7%	100%
Turnover						
£50k-£100k	(n=94)	39%	39%	16%	6%	100%
£100k-£1m	(n=128)	38%	38%	22%	3%	100%
£1m-£5m	(n=113)	32%	36%	27%	5%	100%
£5m+	(n=92)	27%	32%	38%	3%	100%
Industry						
Manufacturing	(n=115)	38%	40%	15%	6%	100%
Retail & Distribution	(n=125)	26%	37%	33%	3%	100%
Services	(n=187)	44%	36%	17%	3%	100%
SRN Usage						
High/Medium use	(n=304)	30%	39%	28%	3%	100%
Low/No use	(n=105)	52%	38%	6%	4%	100%
Frequent users (high/medium users who use the road twice a week or more)	(n=239)	26%	36%	35%	4%	100%
Distance travelled						
Local (within 15 miles)	(n=175)	45%	39%	14%	3%	100%
Regional (within 50 miles)	(n=108)	28%	35%	36%	2%	100%
National/ international (within and outside England and/or the UK)	(n=94)	23%	36%	37%	4%	100%

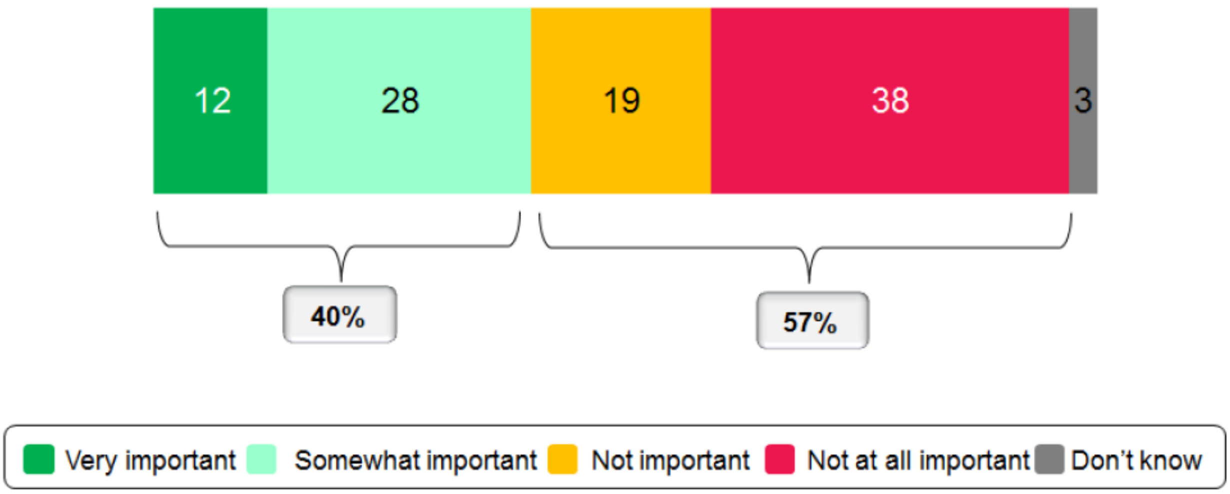
Q11 Please use the scale to indicate the impact of the Strategic Road Network on your organisation's ability to conduct its day-to-day business?

Base size (unweighted): All respondents (427)

Staying informed about the SRN

More than half (57%) of businesses do not consider it to be important to know about news and developments relating to the SRN when planning for business, with nearly 2 in 5 (38%) stating it is 'not at all important'. A similar proportion (40%) however believe it is important to have this information, although only 12% perceive it to be 'very important'.

Importance of news / developments relating to the SRN when planning business (%)



Q12 How important is it for you to know about news and developments relating to the Strategic Road Network when planning for your business?
Base size (unweighted): All respondents (427)

Receipt of this information is more important to:

- those businesses in the Retail & Distribution sector (53% saying 'very/somewhat important' compared to 39% and 32% respectively in the Manufacturing and Services sectors)
- and, those who use the SRN at least once a month (52% of high/medium users saying 'very/somewhat important' compared to just 15% of low/non-users of the SRN).

bdrc continental

Who finds news / developments relating to the SRN important?

	Base Sizes (Unweighted)	Very / somewhat important (weighted %)	Not / not at all important (weighted %)	Don't Know (weighted %)	Total
Total	(n=427)	40%	57%	3%	100%
Business size					
Micro (1-10 employees)	(n=166)	39%	58%	3%	100%
Small (11-50 employees)	(n=132)	48%	50%	2%	100%
Medium/large (51+ employees)	(n=129)	42%	53%	5%	100%
Turnover					
£50k-£100k	(n=94)	35%	63%	2%	100%
£100k-£1m	(n=128)	43%	54%	3%	100%
£1m-£5m	(n=113)	39%	57%	4%	100%
£5m+	(n=92)	48%	50%	2%	100%
Industry					
Manufacturing	(n=115)	39%	58%	3%	100%
Retail & Distribution	(n=125)	53%	46%	1%	100%
Services	(n=187)	32%	63%	4%	100%
SRN Usage					
High/Medium use	(n=304)	52%	45%	3%	100%
Low/No use	(n=105)	15%	84%	1%	100%
Frequent users (high/medium users who use the road twice a week or more)	(n=239)	57%	42%	1%	100%

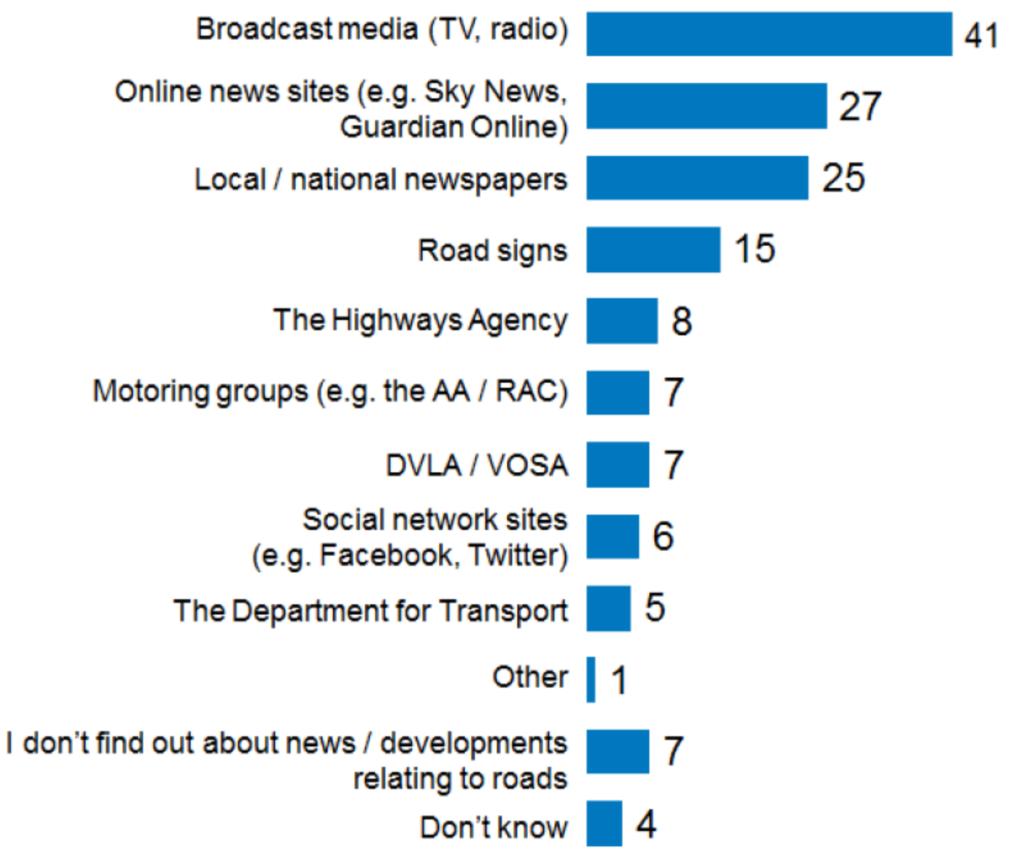
Q12 How important is it for you to know about news and developments relating to the Strategic Road Network when planning for your business?

Base size (unweighted): All respondents (427)

Communications relating to roads in general

Respondents were asked to identify the channels through which they would prefer to find out about news or developments relating to roads in general.

Preferred channels of communications relating to roads (%)



Q17 Thinking about ALL ROADS that you use, how do you prefer to find out about news or developments relating to roads
For this question respondents were able to select more than 1 answer as appropriate
Base size (unweighted): All respondents (427)

2 in 5 businesses (41%) selected broadcast media (TV, radio) as their preferred method of communication for information relating to roads, and this was more prevalent amongst micro and small enterprises. Other popular channels of communication include online news sites (27%) and local / national newspapers (25%). 15% prefer to find out information via road signs. Less important sources of information are transport / motoring-related businesses, such as The AA / RAC / The Highways Agency / DVLA / VOSA and DFT, as well as social network sites.

Preferred channels of communication by type of businesses

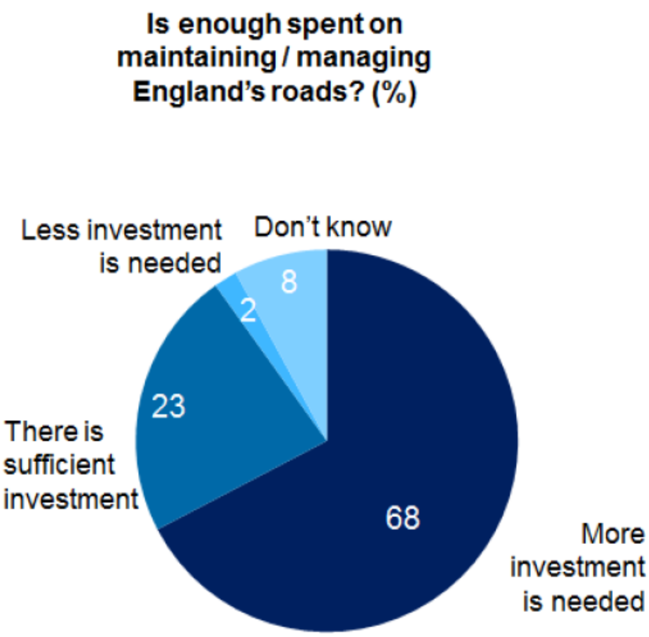
	Base Sizes (Unweighted)	Top 5 preferred channels: Broadcast media (weighted %)	Online news sites (weighted %)	Local / national newspapers (weighted %)	Road signs (weighted %)	The Highways Agency (weighted %)
Total	427	41%	27%	25%	15%	8%
Business Size						
Micro (1-10 employees)	(n=166)	41%	26%	24%	16%	7%
Small (11-50 employees)	(n=132)	40%	33%	31%	14%	11%
Medium / large (51+ employees)	(n=129)	31%	30%	15%	12%	15%
Turnover						
£50k-£100k	(n=94)	47%	23%	18%	10%	8%
£100k-£1m	(n=128)	38%	27%	28%	18%	8%
£1m-£5m	(n=113)	35%	33%	25%	13%	6%
£5m+	(n=92)	46%	42%	20%	17%	24%
Industry						
Manufacturing	(n=115)	46%	31%	27%	10%	4%
Retail & Distribution	(n=125)	34%	25%	23%	14%	13%
Services	(n=187)	42%	26%	25%	19%	7%
Distance travelled						
Local (within 15 miles)	(n=175)	52%	25%	29%	18%	3%
Regional (within 50 miles)	(n=108)	42%	35%	26%	9%	20%
National / international (within and outside England and/or the UK)	(n=94)	26%	32%	17%	16%	8%
SRN usage						
Frequent users (high/medium users who use the road twice a week or more)	(n=239)	42%	26%	26%	15%	12%
High/medium use	(n=304)	44%	26%	30%	17%	9%
Low/no use	(n=105)	38%	32%	15%	8%	6%
Impact of / Dependence on SRN						
Low (rating 1-3)	(n=142)	40%	27%	27%	19%	3%
Medium (rating 4-7)	(n=154)	40%	26%	21%	14%	5%
High (rating 8-10)	(n=108)	50%	33%	33%	14%	23%

Q17 Thinking about ALL ROADS that you use, how do you prefer to find out about news or developments relating to roads?
For this question respondents were able to select more than 1 answer as appropriate
Base size (unweighted): All respondents (427)

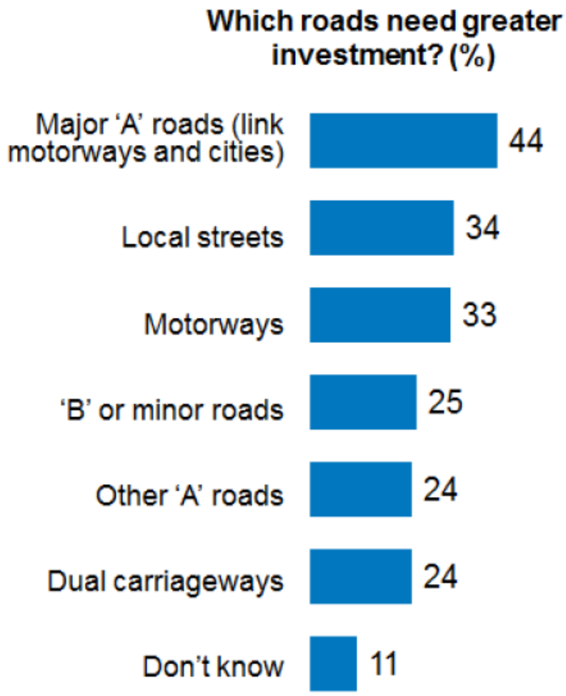
4. Investment in Roads

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

Attitudes towards current / future road investment



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



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 (427)

One quarter (23%) consider that there is 'sufficient' investment in maintaining and managing England's roads. On the other hand, two-thirds of businesses (68%) believe that more investment is needed. This is more characteristic of businesses with a high turnover, with 81% of businesses with a turnover of £1m-£5m and 78% of those turning over £5m+ agreeing more investment is required.

Regardless of their view on whether there is sufficient investment, all respondents were asked which types of roads they felt require greater investment. More than 2 in 5 (44%) of those interviewed felt that major 'A' roads need more investment. This view is particularly prevalent amongst those making regional or national road trips (54% and 52% respectively) and those in the Manufacturing industry (53%). One third (33%) of respondents felt more investment was needed in motorways. One in three (34%) also stated that 'local streets' require greater investment. Unsurprisingly, this view is more characteristic of:

- low/non-users of any roads (52% compared to 32% of high/medium users)
- low/non-users of the SRN (50% compared to 29% of high/medium users)
- businesses typically making 'local' business trips (39%) or no road trips at all (52%).

How important are investments in different types/networks of roads across different categories?

		Road Investment					
	Base Sizes (Unweighted)	**Motorways** (weighted %)	**Dual carriage ways** (weighted %)	**Major 'A' roads** (weighted %)	**Other 'A' roads** (weighted %)	**'B' roads / minor roads** (weighted %)	**Local streets** (Weighted %)
Total	(n=427)	33%	24%	44%	24%	25%	34%
Industry							
Manufacturing	(n=115)	25%	30%	53%	26%	25%	29%
Retail & Dist.	(n=125)	37%	26%	39%	23%	25%	30%
Services	(n=187)	36%	19%	41%	23%	26%	41%
Distance Travelled							
Local (within 15 miles)	(n=175)	35%	22%	38%	23%	26%	39%
Regional (within 50 miles)	(n=108)	42%	39%	54%	27%	24%	28%
National/International (within and outside England and/or the UK)	(n=94)	22%	25%	52%	46%	37%	25%
Frequency of road use							
Frequent (high/medium users who use the road twice a week or more)	(n=339)	35%	28%	44%	24%	25%	32%
High/Med	(n=379)	36%	27%	43%	23%	25%	32%
Low/No	(n=42)*	16%	9%	46%	35%	27%	52%
Frequency of SRN use							
Frequent (high/medium users who use the road twice a week or more)	(n=239)	35%	24%	44%	23%	21%	27%
High/Med	(n=304)	37%	28%	46%	22%	24%	29%
Low/No	(n=105)	21%	24%	41%	31%	31%	50%
Turnover							
£50k-£100k	(n=94)	28%	19%	47%	12%	23%	37%
£100k-£1m	(n=128)	36%	24%	40%	28%	24%	33%
£1m-£5m	(n=113)	33%	33%	55%	31%	35%	35%
£5m+	(n=92)	35%	33%	56%	34%	33%	35%

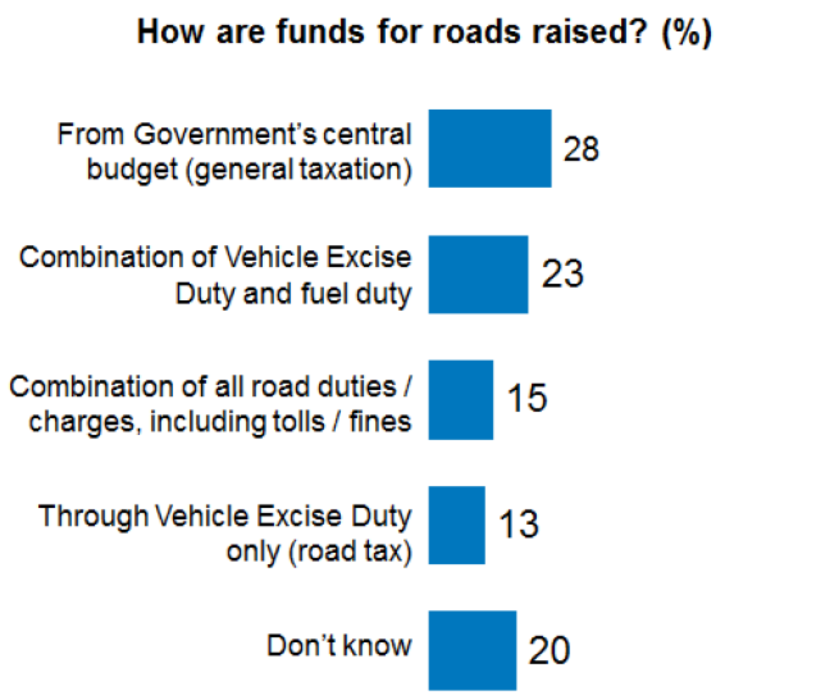
Q2 Which types of roads would you say require greater investment?
For this question respondents were able to select more than 1 answer as appropriate
Base size (unweighted): All respondents (427)
*caution – small base

Other key observations on road investment:

- Investment in Major 'A' roads is perceived as more important:
  - within the Manufacturing sector
  - amongst businesses typically making regional or national/international road trips
- Investment in Motorways is considered as more important by:
  - Those typically travelling regionally
  - High/medium users of any roads, and more specifically the SRN
- Those who typically travel nationally or internationally seem to attribute low priority to investment in motorways and dual carriageways.

How funds are raised

Overall awareness of how funds for roads are raised is relatively low, with around 1 in 4 (28%) correctly identifying that funding comes from the Government's central budget. 1 in 5 (20%) stated that they did not know. The remainder believe that funding comes from a combination of Vehicle Excise Duty (VED) and fuel duty (23%), VED only (13%), or a combination of all road duties/charges (15%).



Q3 How do you think funds for England's roads are currently raised?
Base size (unweighted): All respondents (427)

Awareness of how funds are raised by type of business

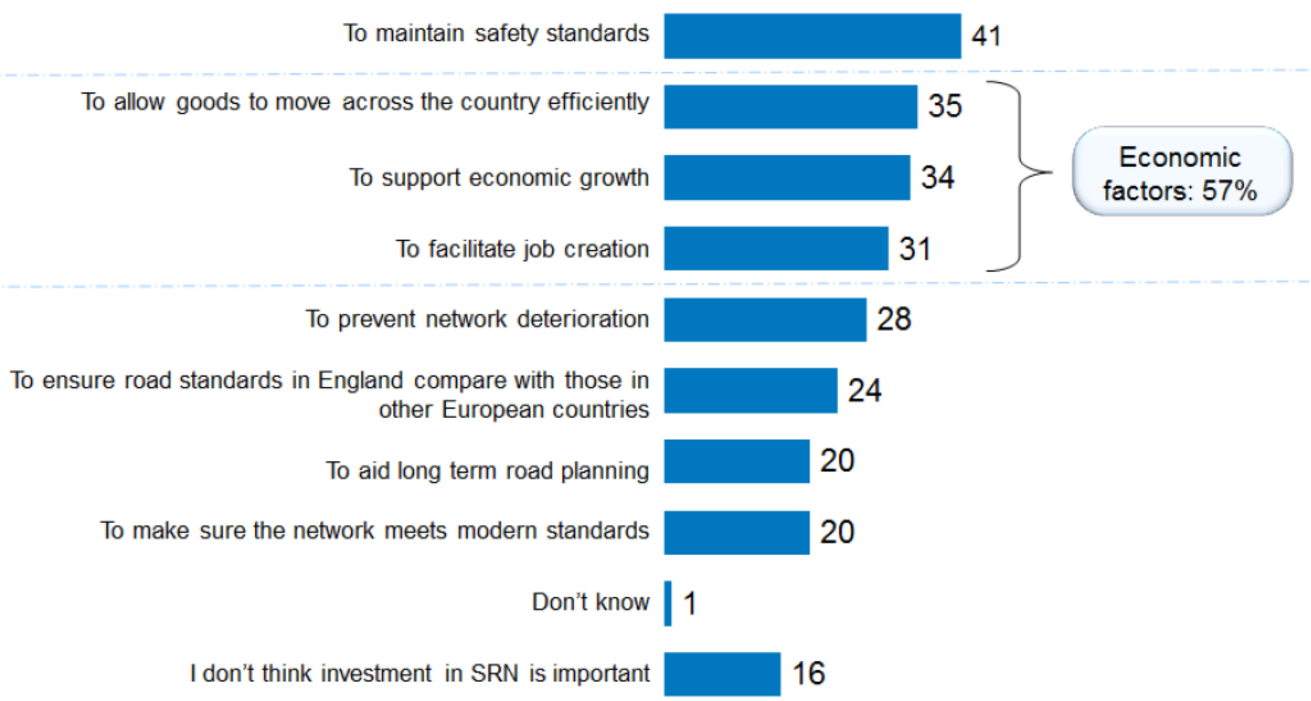
	Base Sizes (Unweighted)	How do you think funds for England's roads are currently raised? From the Government s central budget (weighted %)	Through a combination of Vehicle Excise Duty and fuel duty (weighted %)	Through a combination of all duties and charges inc. tolls and fines (weighted %)	Through Vehicle Excise Duty only (weighted %)	Don't Know (weighted %)
Total	(n=427)	28%	23%	15%	13%	20%
Business Size						
Micro (1-10 employees)	(n=166)	28%	25%	13%	12%	21%
Small (11-50 employees)	(n=132)	27%	15%	24%	18%	16%
Medium / large (51+ employees)	(n=129)	21%	16%	21%	12%	29%
Turnover						
£50k-£100k	(n=94)	27%	27%	18%	10%	18%
£100k-£1m	(n=128)	27%	23%	13%	14%	23%
£1m-£5m	(n=113)	33%	15%	19%	19%	12%
£5m+	(n=92)	26%	20%	31%	4%	19%
Industry						
Manufacturing	(n=115)	15%	40%	14%	9%	22%
Retail & Distribution	(n=125)	36%	11%	19%	19%	14%
Services	(n=187)	31%	20%	14%	12%	23%
Distance travelled						
Local (within 15 miles)	(n=175)	23%	24%	15%	15%	25%
Regional (within 50 miles)	(n=108)	36%	19%	21%	16%	8%
National / international (within and outside England and/or the UK)	(n=94)	29%	21%	18%	8%	25%
SRN usage						
Frequent use (high/medium users who use the road twice a week or more)	(n=239)	33%	19%	21%	13%	14%
High/med use	(n=304)	34%	20%	17%	13%	16%
Low/no use	(n=105)	14%	32%	13%	14%	26%
Impact of / Dependence on SRN						
Low (rating 1-3)	(n=142)	29%	17%	12%	14%	28%
Medium (rating 4-7)	(n=154)	24%	33%	14%	15%	14%
High (rating 8-10)	(n=108)	35%	18%	23%	7%	17%

Q3 How do you think funds for England's roads are currently raised?
Base size (unweighted): All respondents (427)

Investment in the SRN

The reason most stated, as to why there should be investment in the SRN, is to maintain safety standards, with 2 in 5 (41%) of respondents referring to it. However, most businesses are aware of the importance of investing in the SRN to generate economic growth: around one-third believe investment is needed to allow goods to move across the country efficiently (35%), to support economic growth (34%) and to facilitate job creation (31%). Only 1 in 6 (16%) consider investment in the SRN to be unimportant.

Which reasons are most important for investing in the SRN? (%)



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?
Base size (unweighted): All respondents (427)

Businesses' opinions on the importance to invest in the SRN

	Base Sizes (Unweighted)	Investment in the SRN: Growth: Allow goods to move across the country (weighted %)	Investment in the SRN: Growth: Support growth (weighted %)	Investment in the SRN: Growth: Faciltate job creation (weighted %)	Investment in the SRN: Long term planning (weighted %)	Investment in the SRN: I don't think it is important to invest in the SRN (weighted %)
Total	(n=427)	35%	34%	31%	20%	16%
Business Size						
Micro (1-10 employees)	(n=166)	36%	35%	33%	19%	15%
Small (11-50 employees)	(n=132)	33%	29%	23%	23%	20%
Medium / large (51+ employees)	(n=129)	33%	37%	29%	28%	10%
Turnover						
£50k-£100k	(n=94)	35%	35%	41%	16%	14%
£100k-£1m	(n=128)	34%	33%	28%	20%	16%
£1m-£5m	(n=113)	34%	36%	23%	28%	19%
£5m+	(n=92)	55%	46%	29%	43%	5%
Industry						
Manufacturing	(n=115)	30%	32%	32%	20%	25%
Retail & Distribution	(n=125)	48%	33%	26%	31%	17%
Services	(n=187)	30%	36%	34%	13%	9%
Distance travelled						
Local (within 15 miles)	(n=175)	33%	33%	31%	16%	15%
Regional (within 50 miles)	(n=108)	45%	42%	33%	32%	22%
National / international (within and outside England and/or the UK)	(n=94)	33%	29%	31%	23%	4%
SRN usage						
Frequent use (high/medium users who use the road twice a week or more)	(n=239)	43%	38%	30%	26%	11%
High/med use	(n=304)	38%	39%	33%	24%	13%
Low/no use	(n=105)	32%	26%	28%	13%	18%
Impact of / Dependence on SRN						
Low (rating 1-3)	(n=142)	36%	34%	27%	21%	26%
Medium (rating 4-7)	(n=154)	33%	36%	38%	15%	11%
High (rating 8-10)	(n=108)	42%	38%	28%	25%	2%

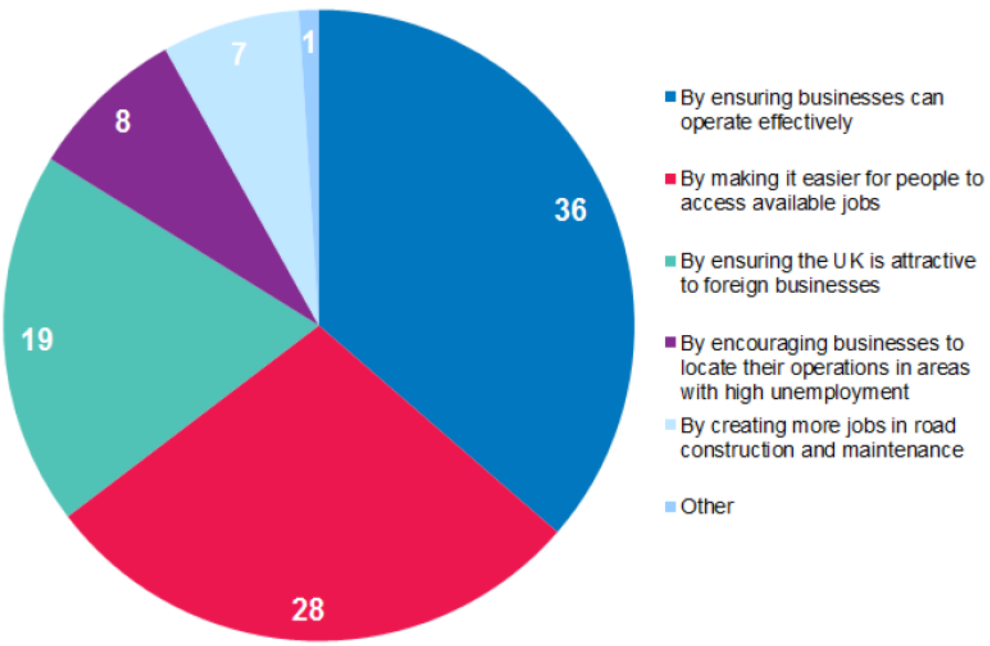
Q13 Some people think it is important to make sure there is enough investment in the Strategic Road Network. Which of the following reasons for investment, if any, are important to you?
Base size (unweighted): All respondents (427)

Differences of opinion amongst businesses can be summarised as follows:

- *To aid long-term road planning* is more important to larger businesses (those with £5m+ turnover), those making regional and national road trips and those in Retail & Distribution.
- *Maintaining safety standards* is more important within the Service sector, and amongst those making local business trips.
- *To allow goods to move across the country efficiently* is more important in the Retail and Distribution sector and amongst frequent SRN users.
- *To support economic growth* is more important to businesses with a turnover of £5m+.
- The proportion of businesses that *do not consider investments in the SRN as important* is higher in the Manufacturing industry, and amongst small businesses.

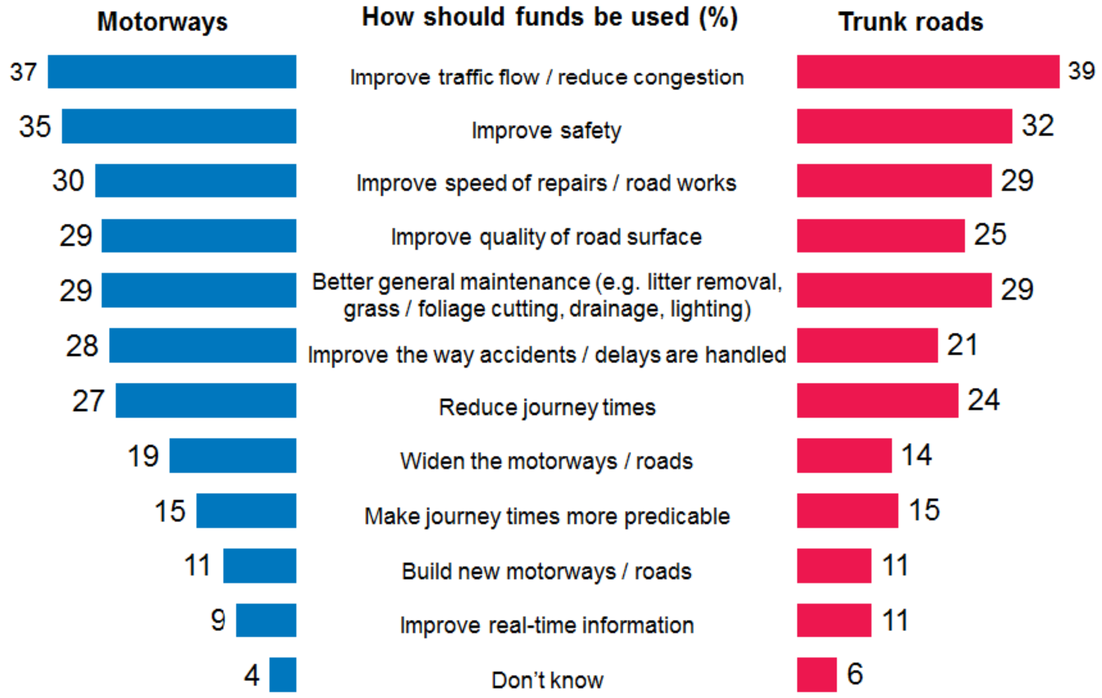
The 31% of respondents who thought that investing in the SRN was important to facilitate job creation were then asked a follow up question to establish the most important way that they perceived this could be achieved. Among those businesses, just over 1 in 3 (36%) believe the SRN can most help by ensuring businesses can operate effectively. Around one quarter (28%) think it is important in providing greater access to jobs, while a further 19% felt attracting foreign investment was most important.

How can investment in the SRN facilitate job creation? (%)



Q14 Which of the following do you think is the most important way that investment in the Strategic Road Network can facilitate job creation?
Base size (unweighted): Respondents who answered that investments in the SRN are important to facilitate job creation (128). These results have to be analysed taking into account the small sample size.

Additional investment in motorways and trunk roads



Q15 If additional funds were available for motorways which of the following do you think it should be used for?
Q16 If additional funds were available for trunk roads which of the following do you think it should be used for?
For both these questions, respondents were able to select up-to a maximum of 5 options
Base size (unweighted): All respondents (427)

Priorities for additional investment are similar for both motorways and trunk roads, with nearly 2 in 5 stating that funds should be used to improve traffic flow / reduce congestion, and 1 in 3 to improve safety. Other priorities include improving both the speed of repairs and the quality of the road surface, as well as better general maintenance (e.g. litter removal, grass cutting, lighting etc.). Building new roads and widening existing roads are considered less of a priority.

Use of funds by type of business

	Base Sizes (Unweighted)	How do you think funds for England's roads should be used? Top 5 reasons									
		Improve traffic flow		Improve safety		Better general maintenance		Improve speed of repairs		Improve quality of surface	
		Motorway	Trunk road	Motorway	Trunk road	Motorway	Trunk road	Motorway	Trunk road	Motorway	Trunk road
Total	(n=427)	37%	39%	35%	32%	29%	29%	30%	29%	29%	25%
Business Size											
Micro (1-10 employees)	(n=166)	36%	39%	36%	31%	29%	29%	31%	29%	30%	26%
Small (11-50 employees)	(n=132)	45%	38%	32%	35%	31%	31%	26%	28%	25%	20%
Medium / large (51+ employees)	(n=129)	35%	38%	34%	29%	19%	22%	24%	19%	18%	22%
Turnover											
£50k-£100k	(n=94)	40%	36%	27%	25%	19%	11%	22%	24%	21%	11%
£100k-£1m	(n=128)	35%	40%	40%	35%	34%	38%	33%	31%	32%	31%
£1m-£5m	(n=113)	42%	31%	31%	30%	22%	23%	31%	32%	33%	30%
£5m+	(n=92)	**54%**	**49%**	34%	36%	34%	41%	29%	25%	20%	24%
Industry											
Manufacturing	(n=115)	36%	40%	46%	37%	27%	24%	35%	34%	26%	24%
Retail & Distribution	(n=125)	39%	42%	26%	29%	26%	22%	29%	26%	27%	19%
Services	(n=187)	37%	35%	35%	30%	31%	37%	27%	27%	32%	29%

Q15 If additional funds were available for motorways which of the following do you think it should be used for?
Q16 If additional funds were available for trunk roads which of the following do you think it should be used for
For both these questions, respondents were able to select up-to a maximum of 5 options
Base size (unweighted): All respondents (427)

Improving traffic flow on motorways and trunk roads was more likely to be selected as a priority for investment by:

- Businesses with a turnover of £5m+ (54% of whom selected improving traffic flow on motorways and 49% on trunk roads)
- Businesses travelling regionally (59% of these selected improve traffic flow on motorways and 54% on trunk roads)
- Organisations which have a high level of dependency on the SRN in order to operate effectively (rating 8-10 – 57% of whom selected improve traffic flow on motorways and 52% on trunk roads).

Use of funds by road use

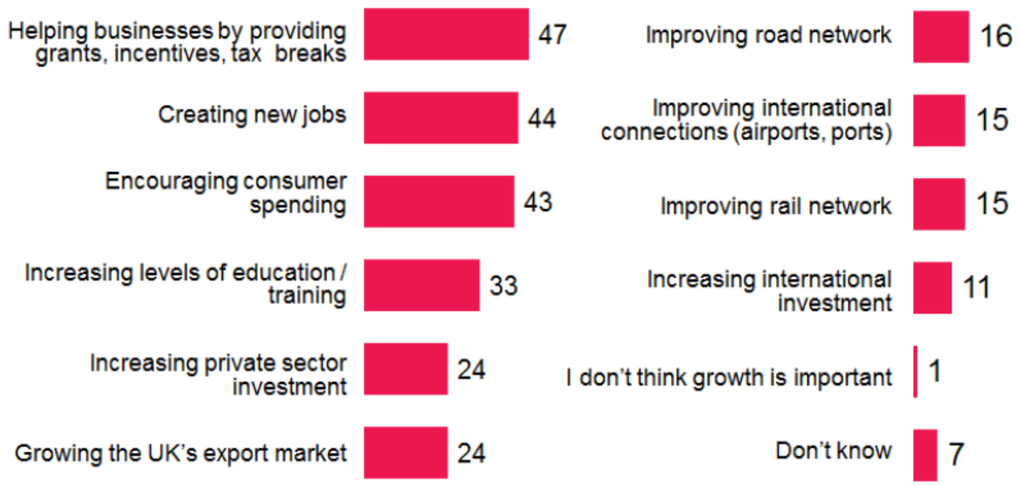
	Base Sizes (Unweighted)	How do you think funds for England's roads should be used? Top 5 reasons									
		Improve traffic flow		Improve safety		Better general maintenance		Improve speed of repairs		Improve quality of surface	
		Motorway	Trunk road	Motorway	Trunk road	Motorway	Trunk road	Motorway	Trunk road	Motorway	Trunk road
Total	427	37%	39%	35%	32%	29%	29%	30%	29%	29%	25%
Distance travelled											
Local (within 15 miles)	(n=175)	31%	34%	38%	35%	28%	31%	42%	38%	33%	31%
Regional (within 50 miles)	(n=108)	**59%**	**54%**	54%	38%	33%	34%	22%	27%	27%	24%
National / international (within and outside England and/or the UK)	(n=94)	36%	37%	4%	10%	33%	26%	19%	15%	13%	9%
SRN usage											
Frequent use (high/medium users who use the road twice a week or more)	(n=239)	43%	46%	31%	26%	27%	24%	24%	25%	20%	20%
High/med use	(n=304)	39%	41%	37%	31%	31%	29%	35%	33%	30%	28%
Low/no use	(n=105)	39%	37%	28%	29%	27%	32%	20%	22%	30%	22%
Impact of / Dependence on SRN											
Low (rating 1-3)	(n=142)	38%	36%	43%	36%	27%	30%	30%	29%	33%	33%
Medium (rating 4-7)	(n=154)	27%	36%	30%	27%	31%	25%	35%	31%	34%	28%
High (rating 8-10)	(n=108)	**57%**	**52%**	37%	35%	33%	41%	22%	27%	17%	11%

Q15 If additional funds were available for motorways which of the following do you think it should be used for?
Q16 If additional funds were available for trunk roads which of the following do you think it should be used for?
For both these questions, respondents were able to select up-to a maximum of 5 options
Base size (unweighted): All respondents (427)

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 (427)

Almost half of respondents interviewed (47%) are of the opinion that providing grants, incentives and tax breaks to help businesses is the main driver of economic growth. Creating new jobs (44%) and encouraging consumer spending (43%) are also key drivers. Improvement of transport systems is perceived to be less important, with around 1 in 6 (15-16%) each holding the view that improving road, rail or airport/port connections will help stimulate the economy.

Improving the road network is viewed as more important amongst businesses that are:

- In Retail & Distribution
- Making business-related regional road trips
- Optimistic about the UK economy in general

Helping businesses is of particular importance for micro businesses with more than half stating this reason (51%), and businesses with smaller turnover (under £1million). In addition, the importance of increasing the level of education increases with the size of the turnover. Finally, increasing private sector investment appears to be more important to businesses in the Manufacturing sector (35% selecting this driver of growth), than to those operating in the Services sector (only 16% choosing this reason).

How do economic priorities vary by type of business?

	Base Sizes (Unweighted)	Driving growth of the UK economy Top 5 drivers: Helping businesses (weighted %)	Creating new jobs (weighted %)	Encouraging consumer spending (weighted %)	Increasing level of education (weighted %)	Increasing private sector investment (weighted %)
Total	(n=427)	47%	44%	43%	33%	24%
Business Size						
Micro (1-10 employees)	(n=166)	51%	43%	41%	33%	24%
Small (11-50 employees)	(n=132)	33%	51%	51%	34%	26%
Medium / large (51+ employees)	(n=129)	30%	51%	37%	34%	21%
Turnover						
£50k-£100k	(n=94)	47%	52%	48%	28%	23%
£100k-£1m	(n=128)	49%	39%	40%	33%	24%
£1m-£5m	(n=113)	41%	51%	42%	40%	29%
£5m+	(n=92)	41%	56%	38%	47%	29%
Industry						
Manufacturing	(n=115)	52%	46%	46%	37%	35%
Retail & Distribution	(n=125)	43%	47%	46%	28%	25%
Services	(n=187)	48%	42%	38%	34%	16%

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 (427)

How do economic priorities vary by road use?

	Base Sizes (Unweighted)	Driving growth of the UK economy Top 5 drivers				
		Helping businesses (weighted %)	Creating new jobs (weighted %)	Encouraging consumer spending (weighted %)	Increasing level of education (weighted %)	Increasing private sector investment (weighted %)
Total	427	47%	44%	43%	33%	24%
Distance travelled						
Local (within 15 miles)	(n=175)	57%	47%	50%	40%	29%
Regional (within 50 miles)	(n=108)	33%	51%	41%	34%	25%
National / international (within and outside England and/or the UK)	(n=94)	44%	39%	31%	20%	13%
SRN usage						
Frequent use (high/medium users who use the road twice a week or more)	(n=239)	41%	49%	39%	29%	21%
High/med use	(n=304)	43%	44%	38%	33%	25%
Low/no use	(n=105)	55%	49%	49%	29%	17%
Impact of / Dependence on SRN						
Low (rating 1-3)	(n=142)	42%	42%	40%	36%	28%
Medium (rating 4-7)	(n=154)	59%	50%	49%	30%	27%
High (rating 8-10)	(n=108)	42%	43%	36%	37%	15%

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 (427)

Respondents were asked whether they were feeling more or less optimistic about the economy than they were three months ago, and if they expected trade activity to increase or decrease in the next 12 months.

Those who are feeling ‘optimistic’ about the UK economy in general are more likely to prioritise helping businesses by providing grants/incentives/tax breaks, increasing levels of education / training, growing the UK’s export market and increasing private sector investment when compared to those feeling more ‘pessimistic’. Amongst this ‘pessimistic’ group, encouraging consumer spending is perceived to be a stronger driver.

Respondents who are feeling ‘confident’ about their own trading prospects state the importance of helping businesses by providing grants/incentives/tax breaks, creating new jobs, increasing levels of education/training, and encouraging consumer spending.

How do economic priorities vary by business confidence and economic optimism?

	Base Sizes (Unweighted)	Driving growth of the UK economy Top 5 drivers: Helping businesses (weighted %)	Creating new jobs (weighted %)	Encouraging consumer spending (weighted %)	Increasing level of education (weighted %)	Increasing private sector investment (weighted %)
Total	427	47%	44%	43%	33%	24%
Business confidence						
Increase	(n=210)	59%	46%	38%	51%	25%
Decrease / Stay the same	(n=213)	37%	43%	47%	16%	23%
Economic optimism						
Optimism	(n=217)	50%	42%	42%	42%	30%
Pessimistic	(n=82)	43%	46%	55%	28%	19%
Stay the same	(n=119)	50%	49%	32%	23%	19%

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 (427)

5. Conclusions

Almost 3 out of 4 (72%) businesses use one or more types of vehicles when travelling for business. 36% of businesses use a company owned or leased vehicle, of which two thirds have continuous use of between 1 and 5 such vehicles.

Nearly half of all business-related road trips (47%) are local (i.e. within a 15 mile radius of the organisation), and almost three-quarters (74%) travel at least twice a week for business. Those businesses based in the Retail & Distribution sector are more likely to travel further and more frequently; those based in the Service industry are less frequent road travellers.

Overall awareness of the Strategic Road Network (SRN) is low (17%). Awareness levels are substantially higher for the term 'Trunk Road', with 49% of businesses aware of the term.

Usage of the SRN is more characteristic amongst larger businesses, businesses making regional road trips, and those in the Retail / Distribution sector. There is some uncertainty amongst some respondents as to how frequently their business uses the SRN.

Subsequently, the SRN is perceived to be more fundamental to the businesses that use it more often – businesses that depend on it in order to conduct day-to-day business (21% of all businesses have high dependence). Being kept up-to-date on news and developments relating to the SRN is also more important to businesses that use the network most often, with more than half of high/medium users (52%) considering news and developments relating to the SRN as important.

TV and radio channels are the preferred source of being kept up-to-date on road news, particularly amongst micro/small businesses, and businesses that only travel locally. Online news sites are also important, especially to businesses with a turnover of £5 million or above.

Two-thirds of businesses (68%) believe that more investment is needed to maintain and manage England's roads: major 'A' roads linking motorways and cities are perceived to need the greatest investment, followed by local streets and motorways. The emphasis on local streets is mainly driven by businesses that use the roads or the SRN less than once a month (low/no use), while businesses that travel nationally or internationally show a lower interest in motorway and dual carriageways investment.

Overall awareness of how funds for roads are raised is currently low, with only one quarter of businesses (28%) correctly stating that it comes from the Government's central budget. The level of awareness is significantly higher in the Retail & Distribution sector (36%), than amongst businesses operating in the Manufacturing sector (15%).

To maintain safety standards is viewed as the most important single reason to invest in the SRN. However, 57% of businesses also referred to the role the SRN plays in supporting the economy, allowing goods to circulate efficiently, or facilitating job creation, as a reason to invest further in the SRN. Although only one in six businesses (16%) consider investment in the SRN to be unimportant, this proportion is higher amongst small businesses, and unsurprisingly businesses that are less dependent on the SRN to operate.

Opinions on the best way to use funds to improve both motorways and trunk roads are similar. The main requirement is to improve traffic flow and reduce congestion, particularly for those that are highly dependent on the network. Other issues considered to be important include ensuring roads are safe and well kept, as well as reducing the overall time taken for repairs.

Improving transport links is not seen as a priority in driving growth of the UK economy, with only 16% of businesses referring to improving road network. However, this is more important to larger businesses with a turnover of £5 million plus and those who travel regionally or further afield. The most important drivers of economic growth are considered to be providing grants, incentives and tax breaks to help businesses, creating new jobs, and, encouraging consumer spending (mentioned by 47%, 46% and 43% respectively).

6. Appendix

Structure of the Business Opinion Omnibus – DfT Sample

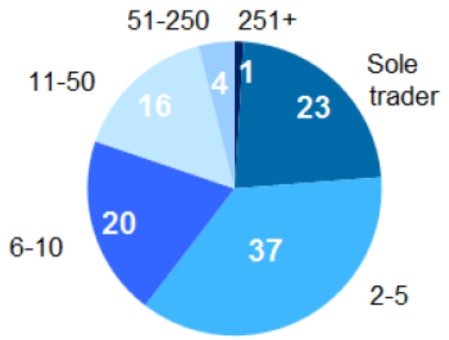
Number of respondents by size of business (unweighted)

Micro	1 employee (sole trader)	42
	2-5 employees	62
	6-10 employees	62
Small	11-50 employees	132
Medium/large	51-250 employees	85
	251+ employees	44
TOTAL		**427**

Number of respondents by turnover (unweighted)

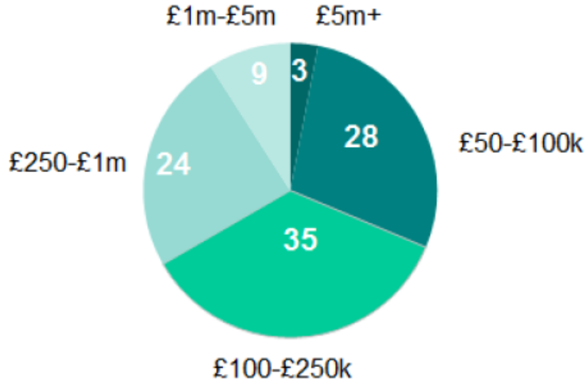
£50k-100k	94
£100k - £250k	49
£250-£1m	79
£1m-£5m	113
£5m+	92
TOTAL	**427**

No of employees (weighted %)



Base size (unweighted): All respondents (427)

Turnover (weighted %)



Base size (unweighted): All respondents (427)

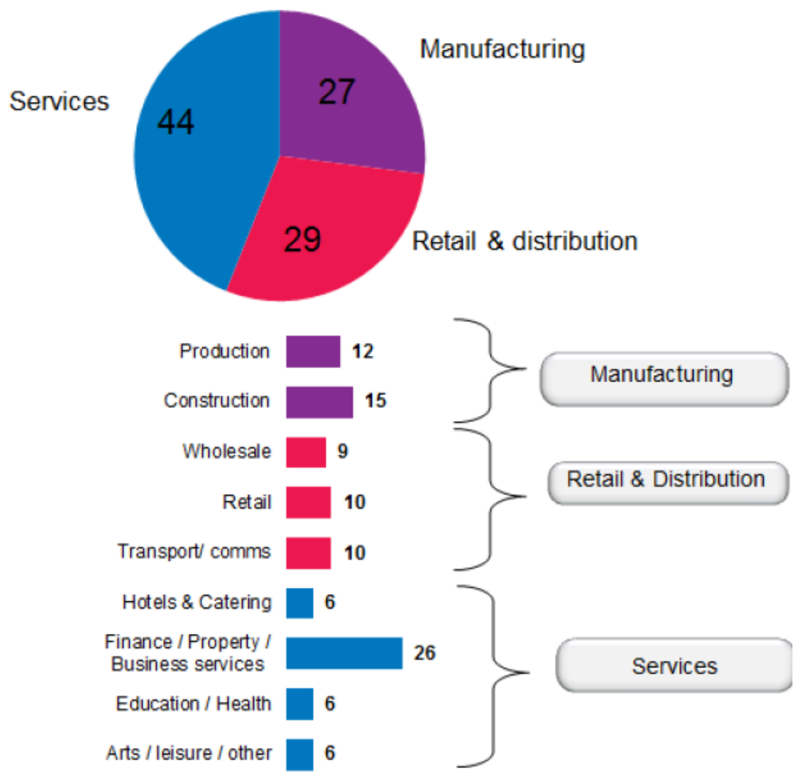
Number of respondents by sector (unweighted)

Sector	
Production/Agri/Mining	58
Construction	57
Wholesale	45
Retail	48
Hotels & Catering	35
Transport/Communication	32
Finance/Prop/Bus Services	83
Ed/Health/Public Admin	36
Arts/leisure/other	33
TOTAL	**427**

Number of respondents by region (unweighted)

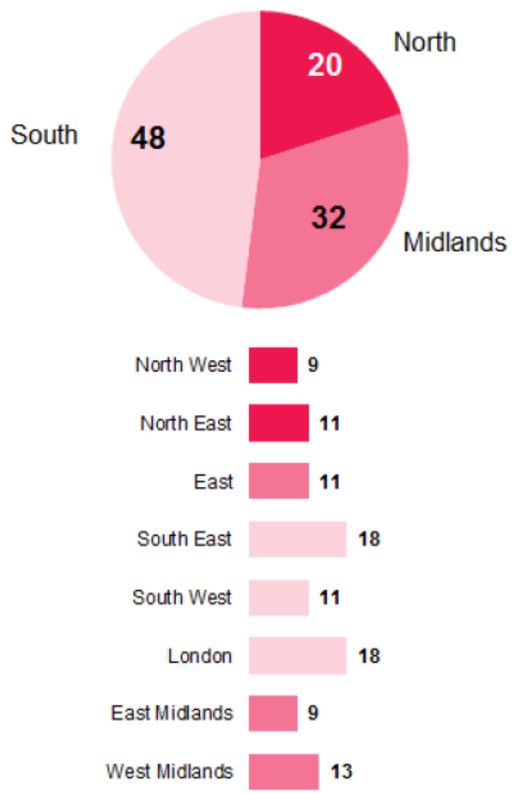
Region	
North West	45
North East	55
East	37
South East	77
South West	44
London	79
East Midlands	42
West Midlands	48
TOTAL	**427**

Sector (weighted %)



Base size (unweighted): All respondents (427)

Region (weighted %)



Base size (unweighted): All respondents (427)

bdrc continental

Considering the small size of certain categories, we have not reported at such a detailed level, but by industry sector.

Allocation of industry sectors

Manufacturing	
	Production (agriculture, mining and manufacturing)
	Construction
Retail & Distribution	
	Wholesale
	Retail
	Transport and Communications
Services	
	Hotels and catering
	Financial, property and business services
	Education, health and public administration
	Arts/leisure/other

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[3] 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[4]) 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.

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[3] 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.
[4] 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.

Questionnaire

DfT Attitudes to Roads in England Questionnaire
=======================================

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

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 **all roads** 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

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