Business attitudes to Roads in England

Wave 2

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providing *intelligence*

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Disclaimer

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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 (wave 1). A modified version of this was then included on the September 2013 wave (wave 2). This report details the findings from this second wave of research (wave 2).

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).

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 sample surveyed in September 2013 rather than of the business population in general.

Please note, the questions submitted by DfT were not piloted or cognitively tested for validity and reliability prior to inclusion on the Business Opinion Omnibus.

For more information on the research methodology, 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 provide a snapshot, as of September 2013 of:

- The profile of organisations who use the roads for business-related travel, including type of vehicles used, and nature / frequency of trips
- Usage of the SRN, and how this varies across different business types and sectors
- Business attitudes towards investment in roads / the SRN
- How transport (in general) and roads (specifically) are perceived in the context of wider economic growth.

Key demographics and categories used in wave 2:

Variable	Category	Base size (unweighted)
Business size	Micro (1-10 employees)	162
	Small (11-50 employees)	130
	Medium/large (51+ employees)	130
Turnover	£50k - £100k	87
	£100k - £1m	107
	£1m - £5m	131
	£5m+	97
Industry	Manufacturing (Production; Construction)	106
	Retail and Distribution (Wholesale; Retail; Transport and Communications)	121
	Services (Hotels and Catering; Financial, Property and Business Services; Education, Health and Public Administration; Art, Leisure & Other)	195
Vehicle type used by employees when travelling for business	Goods vehicles only	82
	Car only	159
	Car and goods vehicles	82
	None	96
	Don't know	3*

*caution – small bases

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

Key demographics cont.

Variable	Category	Base size (unweighted)
Frequency of any road use by organisation for business travel	High/medium use (at least once a month)	327
	Low/no use (less than once a month/never)	89
	Don't know	6*
	Frequent users (high/medium user who uses the road twice a week or more)[1]	286
Frequency of SRN use	High/medium use (at least once a month)	286
	Low/no use (less than once a month/never)	127
	Don't know	9*
	Frequent user (high/medium user who uses the SRN twice a week or more)[2]	217
Typical distance travelled by road	Local (within 15 miles of the main site)	149
	Regional (within 50 miles of the main site)	93
	National / international (within and outside England and/or the UK)	102
	Organisation does not make any road trips for business travel	71
	Don't know	7*

*caution – small bases

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

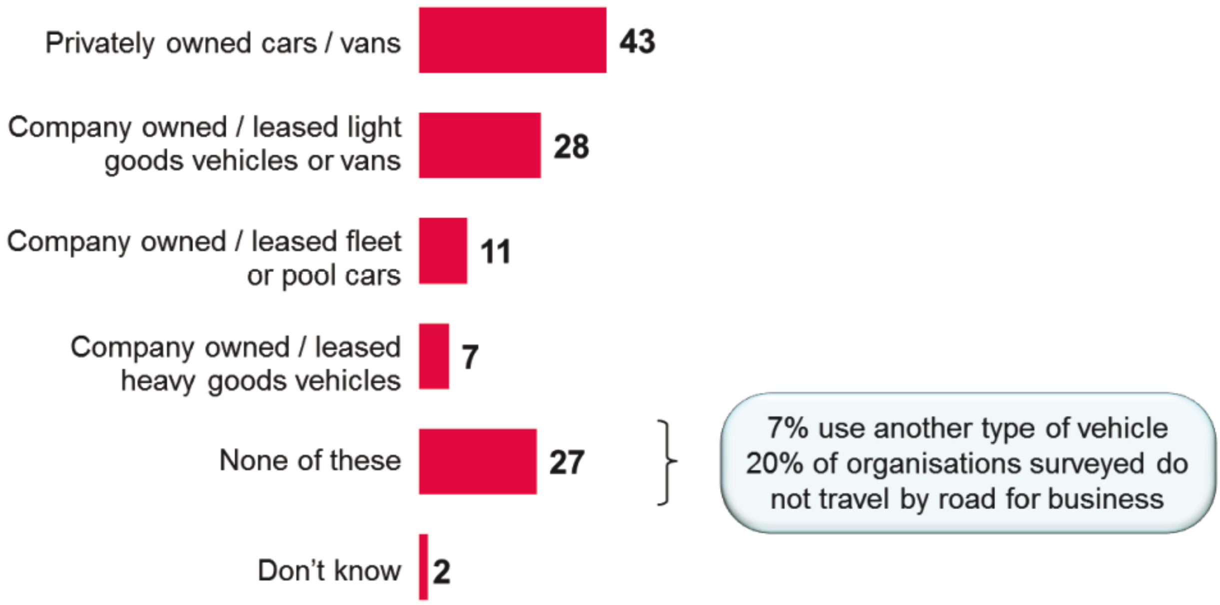
[1] Due to the high number of frequent road users within the sample, this sub-group of high/medium users will be reported separately.
[2] Due to the high number of frequent SRN users within the sample, this sub-group of high/medium users will be reported separately.

2. Vehicle and Road Use

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

Vehicles usage

Type of vehicles used by employees when travelling for business (%)



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 (422)

Employees in around 7 in 10 businesses sampled (72%) used one or more types of vehicle when travelling for business, with privately owned cars / vans being most commonly used (by 43% of businesses). Company owned or leased cars and light goods vehicles were used by 39% of businesses, whilst just 7% used company owned / leased heavy goods vehicles.

Employees in the Manufacturing and Retail & Distribution sectors were more likely to use one or more of the specified vehicles when travelling for business (80% and 82% respectively) than those in Services (60%).

Profile of businesses that used 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=422)	72%	27%	2%	100%
Business size					
Micro (1-10 employees)	(n=162)	73%	25%	2%	100%
Small (11-50 employees)	(n=130)	66%	34%	-	100%
Medium/Large (51+ employees)	(n=130)	72%	28%	-	100%
Turnover					
£50k-£100k	(n=87)	76%	24%	1%	101%
£100k-£1m	(n=107)	68%	29%	3%	100%
£1m-£5m	(n=131)	83%	17%	-	100%
£5m+	(n=97)	73%	27%	-	100%
Industry					
Manufacturing	(n=106)	80%	20%	-	100%
Retail & Distribution	(n=121)	82%	17%	1%	100%
Services	(n=195)	60%	36%	4%	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 (422)

As shown in the tables on the following page, most businesses surveyed (59%) used just one type of vehicle. Larger businesses (both in terms of the number of employees and turnover) were more likely to use:

- More than one type of vehicle,
- 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=422)	27%	59%	9%	4%	2%	101%
Business size							
Micro (1-10 employees)	(n=162)	25%	62%	8%	2%	2%	99%
Small (11-50 employees)	(n=130)	34%	45%	11%	9%	-	99%
Medium/large (51+ employees)	(n=130)	28%	45%	13%	14%	-	100%
Turnover							
£50k-£100k	(n=87)	24%	62%	10%	4%	1%	101%
£100k-£1m	(n=107)	29%	58%	6%	3%	3%	99%
£1m-£5m	(n=131)	17%	56%	21%	6%	-	100%
£5m+	(n=97)	27%	44%	11%	17%	-	99%
Industry							
Manufacturing	(n=106)	20%	62%	9%	9%	-	100%
Retail & Distribution	(n=121)	17%	68%	10%	4%	1%	100%
Services	(n=195)	36%	51%	8%	1%	4%	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 (422)

Types of vehicle(s) used for business travel

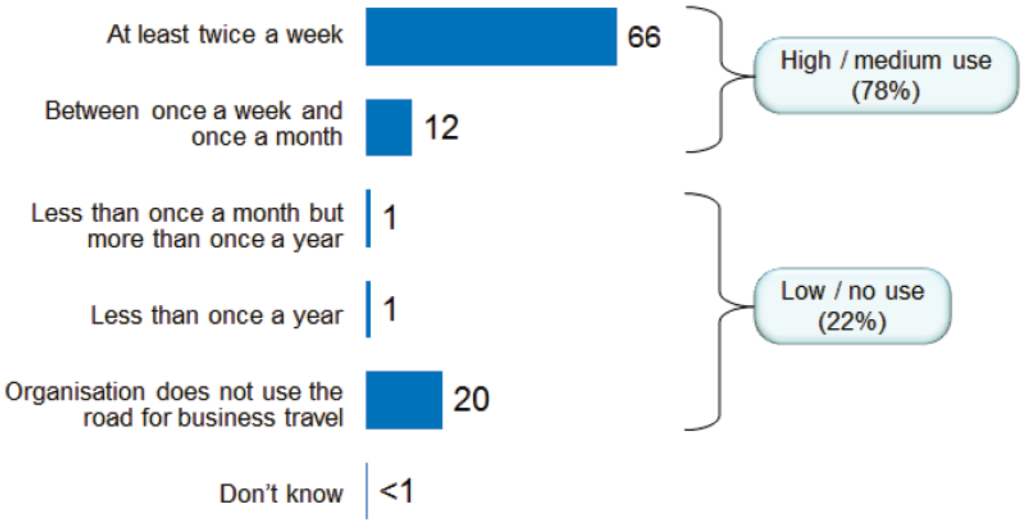
	Base Sizes (Unweighted)	Vehicle Type: Privately owned cars / vans (weighted %)	Company owned / leased light goods vehicles or vans (weighted %)	Company owned / leased fleet or pool cars (weighted %)	Company owned / leased heavy goods vehicles (weighted %)
Total	(n=422)	43%	28%	11%	7%
Business size					
Micro (1-10 employees)	(n=162)	46%	26%	9%	5%
Small (11-50 employees)	(n=130)	31%	36%	18%	15%
Medium/large (51+ employees)	(n=130)	39%	38%	27%	14%
Turnover					
£50k-£100k	(n=87)	53%	26%	9%	6%
£100k-£1m	(n=107)	39%	28%	9%	7%
£1m-£5m	(n=131)	41%	40%	26%	10%
£5m+	(n=97)	45%	32%	31%	18%
Industry					
Manufacturing	(n=106)	37%	53%	12%	8%
Retail & Distribution	(n=121)	48%	30%	10%	15%
Services	(n=195)	43%	13%	12%	2%

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 (422)

Frequency of business-related road usage

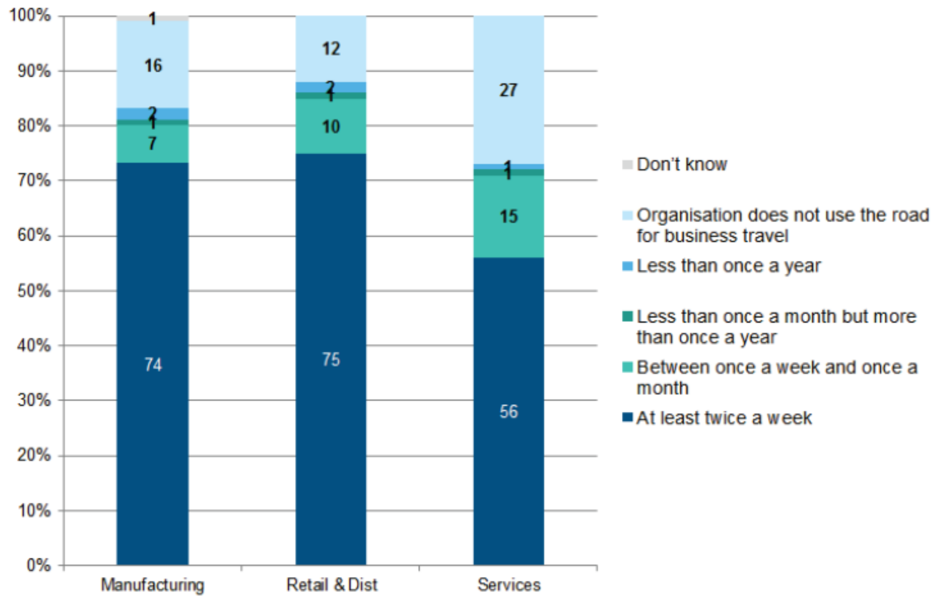
As shown below, 66% of companies interviewed used the roads for business-related trips at least twice a week. This was more prevalent amongst those in Manufacturing (74%) and Retail & Distribution (75%) than those in the Service industry (56%). Only a very small number were undertaking road trips less than once a month (2%) with a further 20% saying their organisation does not use the roads at all for business-related 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 (422)

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 (422)

Type of business-related road trip

Two fifths of businesses surveyed (41%) typically made local road trips (defined as within 15 miles of their location). A further fifth (19%) typically travelled regionally (within a 50 mile radius), whilst around a sixth (17%) typically travelled nationally.

Distance of typical road trips undertaken (%)

Q8 Would you say that road trips made by your organisation are typically…
Base size (unweighted): All respondents (422)

As evident in the chart below, typical distance travelled varied somewhat by sector. For example, businesses surveyed in the Manufacturing sector (36%) were more likely to undertake regional road trips than those in the Retail & Distribution (20%) and Services (9%) sectors. Conversely, a higher proportion of organisations in the Retail and Distribution (48%) and Services (45%) industries typically travelled locally compared to those in Manufacturing (28%).

Typical trip distance also differed by frequency of road use. Just over three quarters (77%) of organisations surveyed that typically made local road trips used the road twice a week or more, compared to nine in ten businesses that travelled regionally (92%) or nationally (91%).

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 (422) NB: Unweighted bases shown above for each sub-group

Frequency of business-related road trips by typical trip distance

(n=106) (n=121) (n=195)

	Local (within 15 miles) (weighted %)	Regional (within 50 miles) (weighted %)	National (within England and/or the UK) (weighted %)
Base size	(n=149)	(n=93)	(n=90)
Frequency of any road use			
High/medium use (at least once a month)	96%	100%	98%
Low (less than once a month)	4%	-	2%
Total	100%	100%	100%
Frequent users (high/medium users who use the road twice a week or more)	77%	92%	91%

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

Base size (unweighted): All respondents who travel by road for business (351)

Q8 Would you say that road trips made by your organisation are typically…(local / regional / national / international)?

Base size (unweighted): All respondents who travel by road for business either locally, regionally or nationally (xxx)

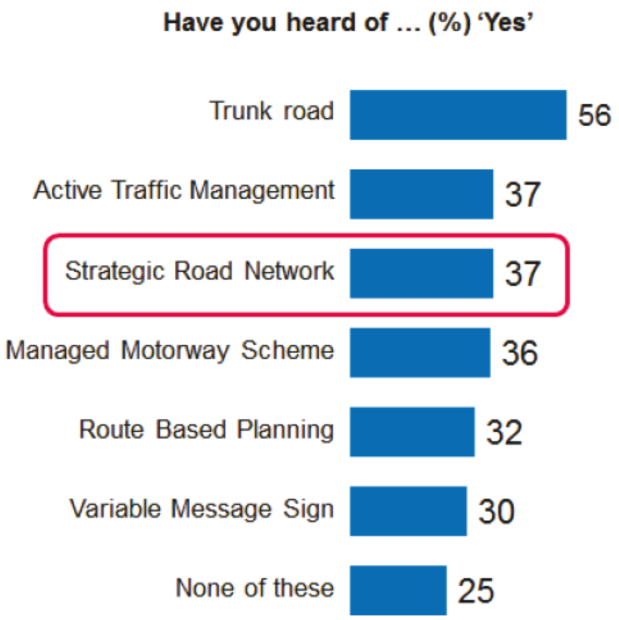
3. The Strategic Road Network (SRN)

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, 37% of respondents claimed 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 (422)

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 just over half (56%).

Awareness of the SRN was highest amongst respondents from businesses with a turnover of £50-100k (50% aware). In terms of industry, awareness amongst respondents representing businesses in the Manufacturing and Retail & Distribution sectors was similar (41% and 42% respectively), while fewer were aware in the Services sector (32%). Respondents in medium and large businesses (51+ employees) tended to have lower awareness of the SRN (21%) than their smaller counterparts (38%). In all cases, awareness of the SRN was lower than awareness of trunk roads.

Awareness of the SRN and Trunk Roads

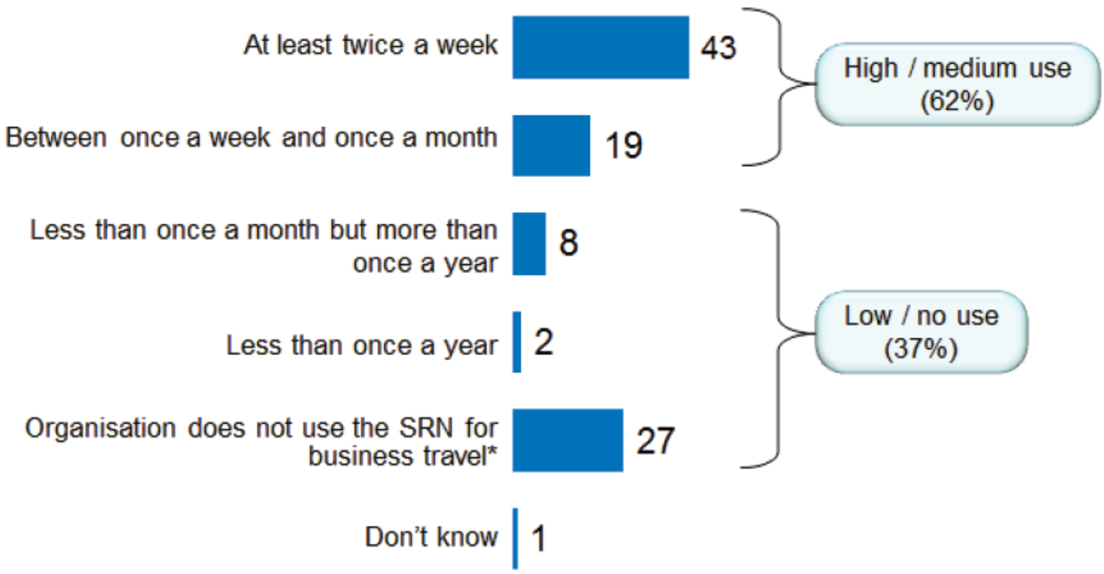
	Base sizes (unweighted)	**% Aware of the SRN** (weighted%)	**% Aware of Trunk roads** (weighted%)
Total	(n=422)	37%	56%
Business size			
Micro (1-10 employees)	(n=162)	39%	61%
Small (11-50 employees)	(n=130)	33%	41%
Medium/large (51+ employees)	(n=130)	21%	33%
Turnover			
£50k-£100k	(n=87)	50%	58%
£100k-£1m	(n=107)	33%	57%
£1m-£5m	(n=131)	29%	52%
£5m+	(n=97)	32%	52%
Industry			
Manufacturing	(n=106)	41%	57%
Retail & Distribution	(n=121)	42%	57%
Services	(n=195)	32%	56%

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 (422)

Usage of the SRN

After respondents were prompted with a description of the SRN, and a list of SRN roads in the vicinity of their organisation, 70% 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%) said their business used the SRN on a 'frequent' basis (i.e. at least twice a week).

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 (422) *NB. Includes those who do not use the roads at all for business travel

SRN use was highest amongst businesses surveyed typically travelling outside their local area. Around 7 in 10 (68%) organisations sampled that undertook regional road trips used the SRN at least twice a week. A similar proportion (70%) of those travelling nationally were also frequent SRN users.

	Usage of SRN					
	Base Sizes (Unweighted)	**High/Med** (at least once a month) (weighted %)	**Low/No** (less than once a month/never) (weighted %)	**Don't Know** (weighted)	**Total**	**Frequent** (high/medium user who uses the road twice a week or more) (weighted %)
Total	(n=351)	77%	21%	1%	100%	53%
Distance travelled						
Local (within 15 miles)	(n=149)	65%	34%	1%	100%	40%
Regional (within 50 miles)	(n=93)	90%	7%	3%	100%	68%
National (within England and/or the UK)	(n=90)	95%	5%	-	100%	71%

Q10 In general how often does your organisation use motorways and trunk roads for business travel
Q8 Would you say that road trips made by your organisation are typically… (local / regional / national / international)?

Base size (unweighted): All respondents who travel by road for business either locally, regionally or nationally (332)

Of the organisations surveyed, frequent SRN use was higher amongst:

- Medium / large sized businesses (51+ employees)
- Businesses with a turnover above £1m
- In the Manufacturing or Retail & Distribution sectors;

Profile of businesses using the SRN for business travel

	Usage of SRN					
	Base Sizes (Unweighted)	**High/Med** (at least once a month) (weighted %)	**Low/No** (less than once a month/never) (weighted %)	**Don't Know** (weighted)	**Total**	**Frequent** (high/medium user who uses the road twice a week or more) (weighted %)
Total	(n=422)	62%	37%	1%	100%	43%
Business Size						
Micro (1-10 employees)	(n=162)	62%	38%	-	100%	43%
Small (11-50 employees)	(n=130)	60%	36%	4%	100%	42%
Medium / large (51+ employees)	(n=130)	79%	19%	2%	100%	51%
Turnover						
£50k-£100k	(n=87)	56%	43%	1%	100%	38%
£100k-£1m	(n=107)	63%	36%	1%	100%	43%
£1m-£5m	(n=131)	72%	26%	2%	100%	55%
£5m+	(n=97)	65%	33%	2%	100%	53%
Industry						
Manufacturing	(n=106)	69%	29%	2%	100%	56%
Retail & Distribution	(n=121)	67%	32%	1%	100%	52%
Services	(n=195)	55%	44%	-	99%	29%

Q10 In general how often does your organisation use motorways and trunk roads for business travel
Base size (unweighted): All respondents (422). Includes those who do not use the roads at all for business travel

Overall, use of roads in general was higher than use of the SRN. Just under 4 in 5 (78%) businesses surveyed used the road for business-related travel at least once a month, whilst 3 in 5 (62%) used the SRN with the same level of frequency. However, medium / large businesses sampled and those with a turnover of £5m+ used the SRN for business-related travel to a similar extent as they used any road.

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 (at least once a month)	78%	62%
Low/No use (less than once a month/never)	22%	37%
Don't know	-	1%
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 (422). Includes those who do not use the roads at all for business travel

Profile of road users 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	(n=351)	97%	77%
Business size			
Micro (1-10 employees)	(n=131)	98%	77%
Small (11-50 employees)	(n=106)	92%	78%
Medium/ large (51+ employees)	(n=114)	94%	89%
Turnover			
£50k-£100k	(n=69)	98%	69%
£100k-£1m	(n=84)	97%	80%
£1m-£5m	(n=112)	96%	81%
£5m+	(n=86)	88%	84%
Industry			
Manufacturing	(n=95)	96%	82%
Retail & Distribution	(n=106)	96%	76%
Services	(n=150)	97%	76%

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 who travel by road for business (351)

In line with general road use, SRN use was greater amongst businesses surveyed that typically made road trips outside of their local area. However, 2 in 5 (40%) organisations that generally travelled within a fifteen mile radius used the SRN at least twice a week.

Frequency of business-related road trips by distance travelled

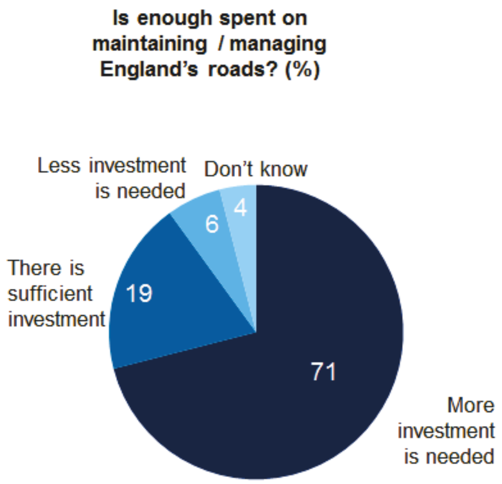
	Local (within 15 miles) (weighted %)	Regional (within 50 miles) (weighted %)	National (within England) (weighted %)
Base size	(n=149)	(n=93)	(n=90)
Frequency of any road use			
High/medium use (at least once a month)	96%	100%	98%
Low use (less than once a month/never)	4%	-	2%
Don't know	-	-	-
Total	100%	100%	100%
Frequent users (high/medium user who uses the road twice a week or more)	77%	92%	91%
Frequency of SRN use			
High/medium use (at least once a month)	65%	90%	95%
Low/no use (less than once a month/never)	34%	7%	5%
Don't know	1%	3%	-
Total	100%	100%	100%
Frequent users (high/medium user who uses the road twice a week or more)	40%	68%	71%

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 who travel by road for business (351) (Those typically travelling internationally, other and don't know not shown)

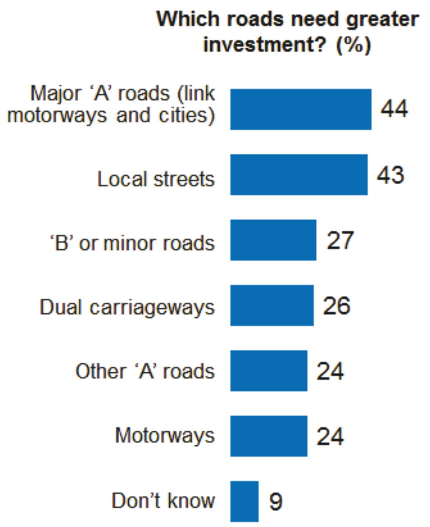
4. Investment in Roads

This section of the report looks at respondents' attitudes towards maintaining England's roads, as well as their 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 (422)



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 (422)

One fifth (19%) of respondents interviewed thought the amount of money spent maintaining and managing England's roads was 'sufficient'. On the other hand, more than two-thirds of business respondents (71%) believed more investment was needed. Support for additional investment was highest among respondents representing businesses with a smaller turnover (79% of businesses with a turnover of £50-100k). However, respondents from businesses with a turnover in excess of £1m also showed higher than average (76%) support for greater investment.

Respondents were also asked which types of roads they felt required greater investment. More than 2 in 5 (44%) of those interviewed felt that major 'A' roads needed more investment. A similar proportion of respondents (43%) stated that 'local streets' required greater investment. By contrast only one quarter of respondents felt more investment was needed in motorways (24%) and in dual carriageways (26%).

Respondents representing businesses that travelled by road at least once a month were more likely to support investment in all road types, than those whose organisations travelled by road less often or never, with the exception of local streets. The same pattern is evident when looking at differences in levels of support for investment by road type between businesses surveyed with high / medium and those with low / no use of the SRN.

Support for investment in major ‘A’ roads was particularly prevalent amongst respondents representing businesses that typically made regional or national / international road trips (66% and 63% respectively), were in the Retail & Distribution sector (55%) or used the SRN at least twice a week (57%).

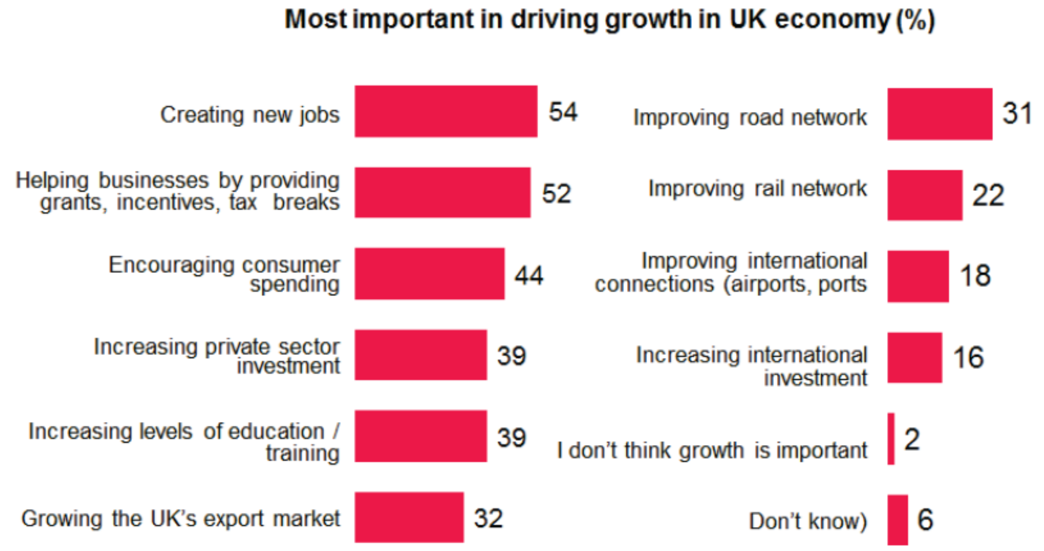
Importance of investments in different types of roads across different categories

	Base Sizes (Unweighted)	Road Investment: Motorways (weighted %)	Dual carriageways (weighted %)	Major ‘A’ roads (weighted %)	Other ‘A’ roads (weighted %)	‘B’ roads / minor roads (weighted %)	Local streets (Weighted %)
Total	(n=422)	24%	26%	44%	24%	27%	43%
Industry							
Manufacturing	(n=106)	33%	34%	47%	29%	29%	34%
Retail & Dist.	(n=121)	24%	25%	55%	28%	36%	44%
Services	(n=195)	19%	23%	36%	19%	19%	48%
Distance Travelled							
Local (within 15 miles)	(n=149)	18%	23%	32%	24%	25%	44%
Regional (within 50 miles)	(n=93)	29%	27%	66%	22%	27%	25%
National/International (within and outside England and/or the UK)	(n=102)	41%	43%	63%	34%	35%	50%
Frequency of road use							
Frequent (high/medium user who uses the road twice a week or more)	(n=286)	28%	30%	50%	29%	28%	41%
High/Med (at least once a month)	(n=327)	26%	29%	49%	26%	29%	42%
Low/No (less than once a month/never)	(n=89)	16%	16%	29%	16%	20%	49%
Frequency of SRN use							
Frequent (high/medium user who uses the road twice a week or more)	(n=217)	38%	34%	57%	30%	26%	36%
High/Med (at least once a month)	(n=286)	31%	28%	48%	25%	26%	40%
Low/No (less than once a month/never)	(n=127)	13%	23%	37%	23%	27%	47%
Turnover							
£50k-£100k	(n=87)	31%	26%	49%	33%	35%	43%
£100k-£1m	(n=107)	21%	26%	39%	19%	22%	44%
£1m-£5m	(n=131)	24%	34%	56%	34%	36%	42%
£5m+	(n=97)	26%	21%	56%	18%	19%	26%

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 (422)

Roads, transport and the economy

Prior to answering questions on roads and road travel, respondents were asked a general question about the factors they thought were important in driving economic growth. To avoid priming respondents and potentially biasing their answers, this question was asked early in the Business Opinion Omnibus questionnaire and purposely positioned away from the remaining questions asked by DfT.



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 (422)

More than half (54%) of respondents interviewed were of the opinion that creating new jobs and / or helping businesses by providing grants, incentives and tax breaks (52%) were important drivers of economic growth. Making improvements to transport systems was perceived to be of lesser importance. Fewer than a third of respondents (31%) agreed that improving the road network would drive growth; a smaller number than this thought improvements to the rail network (22%) and international connections (18%) would stimulate the economy.

Improving the road network was regarded as more important to respondents in businesses that were:

- In the Retail & Distribution or Manufacturing sectors
- Typically making national / international or local road trips for business
- Frequent road users

- Optimistic about the UK economy in general

Creating new jobs was of particular importance for businesses surveyed in the Services and Retail & Distribution sectors, with almost 3 in 5 stating this reason (59% and 58% respectively), compared to 39% of Manufacturing businesses. Helping businesses with grants, incentives or tax breaks was also of particular importance to the Service sector (mentioned by 60%), compared to 50% of Retail & Distribution and 40% of Manufacturing businesses.

Economic priorities by type of business

		Driving growth of the UK economy Top 5 drivers					
	Base Sizes (Unweighted)	Creating new jobs (weighted %)	Helping businesses with grants, incentives, tax breaks (weighted %)	Encouraging consumer spending (weighted %)	Increasing private sector investment (weighted %)	Increasing levels of education (weighted %)	Improving the road network (weighted %)
Total	(n=422)	54%	52%	44%	39%	39%	31%
Business Size							
Micro (1-10 employees)	(n=162)	54%	53%	45%	40%	37%	32%
Small (11-50 employees)	(n=130)	51%	49%	44%	37%	50%	26%
Medium / large (51+ employees)	(n=130)	57%	46%	27%	42%	31%	29%
Turnover							
£50k-£100k	(n=87)	49%	55%	42%	37%	37%	30%
£100k-£1m	(n=107)	55%	52%	44%	42%	37%	31%
£1m-£5m	(n=131)	56%	46%	44%	32%	52%	33%
£5m+	(n=97)	52%	44%	47%	38%	38%	30%
Industry							
Manufacturing	(n=106)	39%	40%	40%	41%	29%	35%
Retail & Distribution	(n=121)	58%	50%	53%	38%	45%	39%
Services	(n=195)	59%	60%	41%	39%	41%	24%
Distance travelled							
Local (within 15 miles)	(n=149)	56%	49%	43%	48%	42%	38%
Regional (within 50 miles)	(n=93)	57%	51%	47%	24%	36%	21%
National / international (within and outside England and/or the UK)	(n=102)	43%	43%	32%	30%	46%	39%
SRN usage							
Frequent use (high/medium user who uses the road twice a week or more)	(n=217)	49%	32%	42%	39%	39%	38%
High/med use (at least once a month)	(n=286)	50%	40%	40%	37%	39%	33%
Low/no use (less than once a month/never)	(n=127)	60%	72%	51%	45%	39%	28%

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 (422)

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.

Economic priorities by business confidence and economic optimism

	Base Sizes (Unweighted)	Driving growth of the UK economy Top 5 drivers: Creating new jobs (weighted %)	Helping businesses with grants, incentives, tax breaks (weighted %)	Encouraging consumer spending (weighted %)	Increasing private sector investment (weighted %)	Increasing level of education (weighted %)
Total	(n=422)	54%	52%	44%	39%	39%
Economic optimism						
Optimism	(n=283)	60%	49%	43%	36%	41%
Pessimistic	(n=54)	64%	74%	63%	61%	23%
Stay the same	(n=80)	27%	41%	30%	30%	47%
Business confidence						
Increase	(n=252)	64%	55%	46%	47%	38%
Decrease / Stay the same	(n=163)	42%	50%	42%	32%	39%

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 (422)

Q: And thinking about the economy generally, would you say you are more optimistic than three months ago, or more pessimistic? And would that be a little more or a lot more?
Q:Thinking about the trading prospects for your company in the next year, do you expect business activity to increase, decrease or stay the same as the past year?

Creating new jobs was the top driver for those respondents feeling 'optimistic' about the UK economy in general, mentioned by 60%. Those feeling 'optimistic' were more likely to prioritise improving international connections (airports and ports) (28%), increasing levels of education / training (41%) and growing the UK's export market (35%) when compared to those feeling more 'pessimistic' (5%, 23% and 21% respectively). Amongst this 'pessimistic' group, helping businesses by providing grants, incentives or tax breaks was perceived to be the most important driver of growth (stated by 74%).

Over half of respondents with 'increased confidence' about their own trading prospects stated the importance of creating new jobs and helping businesses by providing grants / incentives / tax breaks (64% and 55% respectively).

5. Conclusions

A fifth (20%) of businesses surveyed claim their employees do not use the road for business-related travel.

Almost 3 in 4 (72%) businesses sampled travelled for business by car, light goods vehicle or heavy goods vehicle. 39% of these businesses used a company owned or leased vehicle (either fleet/pool cars, light goods and/or heavy goods vehicles).

Half (51%) of businesses surveyed that travelled by road for business typically made local road trips (i.e. within a 15 mile radius of the organisation), and more than 4 in 5 (82%) travelled by road at least twice a week for business. Those based in the Manufacturing or Retail & Distribution sectors were more frequent road users than businesses in the Service sector.

Overall 37% of respondents were aware of the term Strategic Road Network (SRN). Awareness levels were substantially higher (56%) for the term 'Trunk Road' for all respondents, regardless of the size or sector of the business they represented.

After prompting with a description of the SRN and list of example roads in the vicinity of their organisation, 70% respondents reported their employees had used the SRN at least once in the past 12 months for business-related travel.

Frequent usage of the SRN was more characteristic amongst medium / large sized businesses (51+ employees), businesses making regional and national/international road trips, and those in the Manufacturing or Retail & Distribution sectors.

More than two-thirds of respondents (71%) believed that more investment is needed to maintain and manage England's roads. Major 'A' roads (linking motorways and cities) were perceived to need the greatest investment, followed by local streets (mentioned by 44% and 43% respectively). The emphasis on major A roads is driven by businesses surveyed typically travelling regionally or further afield (66% and 63% respectively), as opposed to locally (32%).

Improving transport links was seen as an important factor in driving growth of the UK economy, with 31% of respondents referring to improving road network. However, this was of greater importance to respondents representing businesses in the Retail & Distribution or Manufacturing sectors, that used the road at least twice a week, and those that typically made local or national/international road trips.

The most important drivers of economic growth were considered to be creating new jobs and helping businesses by providing grants, incentives and tax breaks (mentioned by 54% and 52% respondents respectively).

6. Appendix

Sample Profile

Structure of the Business Opinion Omnibus: DfT Sample

Wave 2

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)	41	£50k - £100k	87
Micro: 2-5 employees	57	£100k - £250k	30
6-10 employees	64	£250k - £1m	77
Small: 11-50 employees	130	£1m - £5m	131
Medium / Large: 51-250 employees	86	£5m+	97
251+ employees	44		
TOTAL	**422**	**TOTAL**	**422**

Number of respondents by size of business (weighted %)		Number of respondents by turnover (weighted %)	
Size	**% of respondents**	**Turnover**	**% of respondents**
1 employee (sole trader)	21	£50k - £100k	28
Micro: 2-5 employees	37	£100k - £250k	33
6-10 employees	21	£250k - £1m	27
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	**106**	**North**	**114**
- Production / Agri / Mining	58	- North West	49
- Construction	48	- North East	65
Retail & Distribution	**121**	**Midlands**	**105**
- Wholesale	48	- East	42
- Retail	49	- East Midlands	32
- Transport & Communications	24	- West Midlands	31
Services	**195**	**South**	**203**
- Hotels & Catering	33	- South East	72
- Finance / Prop / Bus Services	87	- South West	47
- Ed / Health / Public Admin	40	- London	84
- Arts / Leisure / Other	35		
TOTAL	**422**	**TOTAL**	**422**

Number of respondents by sector (weighted %)		Number of respondents by region (weighted %)	
Sector	**% of respondents**	**Region**	**% of respondents**
Manufacturing	**27**	**North**	**24**
- Production / Agri / Mining	11	- North West	13
- Construction	16	- North East	12
Retail & Distribution	**28**	**Midlands**	**28**
- Wholesale	10	- East	12
- Retail	10	- East Midlands	7
- Transport / Communications	9	- West Midlands	9
Services	**45**	**South**	**47**
- Hotels & Catering	6	- South East	18
- Finance / Prop / Bus Services	26	- South West	10
- Ed / Health / Public Admin	5	- London	19
- Arts / Leisure / Other	7		
TOTAL	**100%**	**TOTAL**	**100%**

Age and gender of respondents (unweighted)		Age and gender of respondents (weighted %)	
Age / Gender	**No. of respondents**	**Age / Gender**	**% of respondents**
Age		**Age**	
- 24 years or less	9	- 24 years or less	2
- 25-34	71	- 25-34	15
- 35-44	89	- 35-44	14
- 45-54	154	- 45-54	45
- 55-64	77	- 55-64	19
- 65 years or older	22	- 65 years or older	5
Gender		**Gender**	
- Male	266	- Male	68
- Female	156	- Female	32
		-	
TOTAL	**422**	**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[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.

[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.

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+.

DFT Attitudes and Behaviour towards Roads – ECONOMY QUESTION[5]
===

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

[5] 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 (IF CODE 6 SKIP TO NEXT SECTION)	6
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
