

Appendix D: Consumer Impact Study Executive Summary - Vector Research Ltd

Introduction

- 1 The overall aim of the consumer impact study was to understand the relationship which consumers in the West Midlands have with congestion and their likely behavioural and attitudinal reactions towards options to address congestion. The detailed objectives were as follows:
 - To identify whether people think there are congestion problems in the West Midlands (today and/or in the future). If so, to consider what are (or will be) the problems to people;
 - To explore the public's relationship with congestion and their current and likely future reactions to it (at different levels);
 - To explore attitudes towards the proposed lifestyle measures and the likelihood and extent to which these would encourage people to change their travel behaviour;
 - To explore attitudes towards road pricing if revenues were re-invested in the local transport system;
 - To build a segmented picture of the population in terms of attitudinal and behavioural characteristics (alongside ethnic, demographic and locational characteristics) to identify more scientifically how lifestyle is impacted by congestion and how amenable different groups are to proposed measures.
- 2 A combination of quantitative and qualitative surveys were used to achieve a sufficient breadth and depth of output to reliably inform the wider study analysis. These surveys included:
 - A quantitative attitudinal survey covering 800 West Midlands residents;
 - A 'Hall Test'⁽ⁱ⁾ survey of 200 people to capture data from those travelling from outside the conurbation area;
 - Qualitative studies of 24 households, designed to capture more in-depth views and attitudes on congestion and demand management options;
 - Four 'focus groups' to capture reactions to demand management policy options.
- 3 There is a wide recognition of the problem of congestion. Over eight out of ten agree that congestion is a problem in their local authority district during morning (81.2%) and evening (83.6%) peak hours; and three-quarters (76.1%) agree that

i Face-to-face interviews at hall tests enable a depth of understanding to be gained by giving respondents the opportunity for greater two way discussion and use of open ended questions.

it is a problem when schools finish. The fact that a small group feel there is no congestion problem reflects the fact that some individuals have no experience of road delays, and that there is a small group who deny its significance locally.

- 4 Around 17 per cent strongly agree that congestion has a negative effect on: (a) my working life; and (b) on my lifestyle. Thus just under a fifth are currently affected seriously by congestion.
- 5 Congestion has at least some negative effect upon about four in ten of the adult population in terms of lifestyle (39.2%) and working life (37.7%). Yet overall more disagreed than agreed with the statements that it had a negative effect.
- 6 This is to some degree reflected in the measures taken to adjust to congestion. By far the most frequently cited measures involved an adjustment to car use i.e. changing time of travel and/or adjusting route.
- 7 It is clear that the attitudinal impacts on the majority of drivers currently are not great – with respondents putting up with congestion or adjusting routes and/or working hours. In other words they believe that the road network may cause frustrations but they do not perceive a situation close to “meltdown”. The car culture which they are engaged in (and which for some motorists may even involve an embracing of congestion!) has positives which far outweigh the negatives – and their dislike of public transport (or more specifically bus) means that the majority are tolerating current congestion.
- 8 The public, and indeed drivers, appear confused about the degree to which congestion will impact in the future – there is a roughly even split between those who think it will get much worse and those who do not (including 'don't knows').
- 9 When asked to predict typical journey time increases in 15 years time, the responses indicate two 'peaks' i.e. around a 10-20% increase in journey times which was cited by around 4 in 10; and at least 50% which was cited by just under a quarter.
- 10 The reasons why only around half of the population think congestion will get much worse are a mix of:
 - Unfounded optimism – the car culture and car based activity have expanded continuously and there appears to be an assumption that somehow something will be done to address congestion;
 - A few respondents argued that there would be a saturation point i.e. everyone would have a car and so it would not get any worse. Another related argument was that congestion would regulate itself and therefore would stop getting worse after a point;
 - The 'make do and mend' mentality by which drivers are currently addressing congestion (changing time of travel and/or routes)

- 11 Almost two-thirds of drivers are prepared to put up with notional limited and moderate levels of congestion (which included 15% and 30% increases in mean journey times) without changing behaviour, even though in the latter case three-quarters of drivers (74.8%) state that this would have a negative effect on their travel.
- 12 At the same time there is a clear recognition by the majority of the fact that:
- such levels of congestion would pose problems;
 - action would be needed to tackle congestion;
 - drivers should change behaviour;
 - particularly in the scenario where there is 100% increase in mean journey times
- 13 The fact that, as an example, the proportion overall who would put up with a moderate increase in congestion rather than change behaviour (56.5%) and yet 75.3% claim that drivers should change their behaviour at this level provides hard quantitative evidence that emerged in the case studies i.e. that individuals believe something should be done by others (i.e. other motorists) to address congestion which does not impact on themselves.
- 14 In terms of likely response to notional increases in congestion, the key themes displayed are that
- 15 The most popular choice at the limited increase in congestion is to carry on as normal;
- 16 The most popular choices at the moderate and major increases in congestion are travel at different times of day, and choose different routes.
- 17 In other words many drivers feel that they can continue with existing responses to traffic. Thus even with a doubling of journey times (i.e. under the major increase scenario), only one in four (26.5%) state that they will definitely use public transport more or use local shops and facilities more (26.1%). The majority of the population agrees that action needs to be taken to tackle current levels of congestion (78.8%). However, given the earlier finding that a relatively small proportion say that congestion has a strong negative impact upon them, this does not mean that people are necessarily ready for policies to tackle congestion that might have a negative effect upon them. In general, congestion is not perceived to be at breaking point.
- 18 Nearly everyone (89.2%) thinks that the authorities have a responsibility for tackling congestion. About half (48.8%) also think that drivers have at least an equal responsibility.

- 19 A higher proportion of respondents said that they would attach high or medium priority to: lifestyle measures; development of technology; and city planning; to tackle congestion than they would to road pricing (RP). This reflects preferences for vaguer, broader policies that have less of an immediate or obvious impact on the individual. However, over four in ten (44.4%) would attach high or medium priority to RP.
- 20 Smaller proportions of respondents also thought that RP would be effective in tackling congestion in comparison with: lifestyle measures; development of technology; and city planning. However, about half (49.3%) did think that RP would be very or fairly effective.
- 21 Interestingly, the proportion who thought RP would be effective was higher than the proportion who thought high or medium priority should be attached to it. For the three other policy approaches, the opposite was the case.
- 22 There is a lot of strong feeling about the issues which will affect reactions to policy. People express strong feelings in particular about: the frustration of congestion; the unfairness of RP; and the dislike of public transport. This leads some to suggest quite extreme measures such as limiting the number of cars per household to one. This suggests there is no obvious and palatable solution in the public's mind but some desperation to avoid charging.
- 23 Suggested preferred policy measures included: options to reduce congestion around schools e.g. 'walking buses' and enforcement of parking restrictions; improved provision for cyclists; road design improvements; flexible working arrangements; and radical improvements to public transport (including tackling safety and anti-social behaviour concerns).
- 24 The evidence suggests that an intensive application of lifestyle measures could reduce car use. Although the benefits of these types of measures could be understood, there were some concerns expressed frequently on specific measures, for example, car sharing limits independence in an unacceptable way; working at home might be difficult because of the lack of social interaction and motivation.
- 25 There is a significant minority in favour of charging – just over a quarter (26.6%) said that they were in favour of the example RP scheme and the accompanying major public transport improvements.
- 26 When presented with the future congestion scenarios – almost half (46.9%) were either in favour of RP or neutral about its introduction in the case of a major increase in congestion.

- 27 A smaller proportion (12.8% of all and 10.2% of those who drive to work usually on main routes into and out of central areas) said that they would be prepared to pay £5 themselves (per vehicle for a return trip on the most congested roads entering or leaving central areas, and on motorways at peak hours) to avoid congestion.
- 28 Support for charging was lower amongst: those who regularly travel away from their base for work (18.9% in favour) and those who use main routes into and out of central areas to travel to work (23.2%). In other words, support is lower amongst those who would expect to have to pay the charge themselves if they did not alter their travel behaviour. Accordingly, the highest levels of support for RP came from those less likely to incur charges, for example, over a third (36.1%) of respondents who used the car for less than a third of their motorised travel were in favour of RP. There was marginally more support for the scheme amongst those who said that congestion had a strong negative effect upon their working life than amongst others.
- 29 There is an ambiguous relationship between support for RP and concern about environmental issues. Some see charging as a way of helping to curb car use and thus good for the environment, others think charging is not a fair way of dealing with the issue.
- 30 The qualitative research showed that openness to RP is often qualified. Some would consider this acceptable if other taxes on motorists were reduced. Some felt that a lower charge could be acceptable but that £5 was too high.
- 31 The principal reason for opposition to charging is that motorists do not want to pay any more to drive. They already feel that driving is expensive due to taxes and feel that the motorist is unfairly penalised for driving. There was also some scepticism about whether RP would really tackle congestion and whether the income raised would really be re-invested in the transport system.
- 32 Responses showed that RP is likely to be the most effective measure for changing travel behaviour. Those who travel at least monthly on main routes into and out of central areas at peak times and on motorways in the West Midlands conurbation would change their behaviour under the introduction of a charging scheme. About half (49.4%) said they would definitely or probably restrict their car travel and nearly a third (32.4%) would definitely or probably stop using the car during rush hour. High proportions said that they would adopt strategies such as choosing alternative routes (56.9% definitely or probably) or changing their travel times (43.8% definitely or probably) i.e. they would continue to use the car but look for ways of avoiding the charge. About three in ten (30.5%) would definitely or probably use public transport more in the rush hour and about a quarter (26.3%) would definitely or probably walk or cycle more in the rush hour. Few (less than 6%) would make major changes such as moving house, changing jobs or to stop using the car altogether.

- 33 Thus In terms of behavioural responses to RP, the research suggests that:
- **RP would reduce car travel.** It is difficult to conclude on the extent of this because strong opposition leads some to say they will refuse to pay on principle – how this would play out in reality is difficult to know. Some clearly feel that they would not be able to justify this expenditure though and would therefore change their behaviour.
 - There is evidence that **people would seek to avoid the charge but keep driving by changing their time or route of travel.** This needs careful consideration to avoid unhelpful shifts in travel behaviour that might exacerbate congestion in other locations or at other times.
 - RP would be more effective if some of the negatives of public transport discussed previously were addressed so that this became a more attractive, or at least satisfactory, alternative. **The current bus product is not considered as a viable alternative** by the majority of regular car users.
 - **Equity concerns need to be considered**, for example, that those who can pay will and others, unfairly, will have no choice but to find other means of travel or to change their work/lifestyle.
 - Some will pay, possibly reluctantly at first but there was a perception that it could become a norm.
- 34 Considerable difficulty was experienced in engaging consumers in a national dialogue about RP. Typically, the discussion would be demonstrated by emotive views about current congestion problems; about the state of public transport; and the idea of charging the victimised motorist. They are often concerned about their own individual situation rather than the bigger picture. They talk about the need for others to reduce their ‘unnecessary’ journeys rather than any they might be making. These feelings are easily stirred up by either the media and or those who are very vocally and strongly opposed to charging.
- 35 Despite this volatility people do perceive that there is a problem – to which they do not appear to have a solution themselves. In addition there is evidence that:
- A radically improved public transport system could attract people away from their cars;
 - There is already some support for RP;
 - There is some perception that RP could be effective.