APPENDIX 13

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Financing the Crossings User Consultation Report

February 2022 – Final report

Prepared for:	The Tamar Bridge & Torpoint Ferry Joint Committee
By:	Sarah Ingram Lead Consultant
Proposal No:	TBTF 007-009
Date:	1.3.22

Contents

- Behavioural data
- Views on the bridge and ferry price structure
- The effects of the pandemic (COVID19) on users' travel behaviour
- Concerns or suggestions on the charging structure or service
- Summary

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Research objectives

- To obtain behavioral data regarding which methods, how often, and for what reasons respondents use the Tamar Bridge and / or the Torpoint Ferry.
- To understand how respondents currently pay to use either the Tamar Bridge and / or the Torpoint Ferry.
- To give an opportunity to provide feedback on the various options available to increase income - to continue to operate safely, maintain the crossings and improve the service to customers.
- To review the impact of the pandemic on users' future travel patterns and determine how they might change and reasons for those changes.
- To record verbatim responses with regards any other concerns or suggestions regarding the charging or service in general of either the Tamar Bridge and / or the Torpoint Ferry services.

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Research methodology (1)

- In total circa 30,000 users had the opportunity to respond, with circa 3,849 returns received (1,670 postal, 2,179 online). This equated to a response rate of 13%.
- The total sample size of 3,849 allowed analysis at the 95% confidence level with a margin of error of only +/-1.42%. (The Department of Transport usually look for margin of error at this confidence level of no more than +/- 2.8%/1,100 sample)
- The survey was completed over a two day period on Thursday 13th and Saturday 15th January 2022.
- A double-sided A4 self-completion questionnaire and supporting information leaflet was administered in four ways to the users crossing on the bridge or ferry on those days:
  - By hand – from booth collectors and ferry staff to travellers and passengers using the ferry and bridge (circa 15,350 travellers)
  - By post to 781 TAG holders for whom postal addresses were held
  - By email to 13,864 TAG holders for whom email addresses were held
  - Online via a “public” survey - accessible from the www.tamarcrossings.org.uk web site.
- The consultation was open from the 13th January and up to and including the 14th February 2022.

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Research methodology (2)

Reporting

- This report summarizes the results from the on-line and postal self-completion surveys which have been combined for analysis purposes.
- Comparisons have been made to the 2020 survey which used the same methodology and had a similar margin of error (+/-1.65%) at the 95% confidence level.
- The data used in this report is rounded up or down to one decimal place. It is for this reason that, on occasions, charts or tables may add up to 99% or 101%. Where tables or graphs do not match exactly the text in the report, this occurs due to the way figures are rounded up or down when responses are combined.
- Where respondents are able to select more than one option (multi-coded questions) the frequency of selection is shown as a percentage of the total number of responses recorded.
- Where responses have recorded 0% (i.e.no data recorded or less than 0.4%) the 0% is often omitted from the charts and tables to aid clarity.

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Leaflet and Questionaire

Leaflet 1

The Tamar Crossings – the Tamar Bridge and the Torpoint Ferry – are operated by the Tamar Bridge and Torpoint Ferry Joint Committee on behalf of Cornwall Council and Plymouth City Council which jointly own them. The crossings are operated together as a single business and are funded on a 'user pays' principle from toll income in accordance with the Tamar Bridge Act. This means that all of the money needed to operate, maintain and improve the two crossings comes from toll charges - no funding is received from the Government or from the two councils. The finances of the crossings are 'ring-fenced' which means that any surplus is retained in reserves and any deficit depletes those reserves. Before the pandemic struck we had not expected to have to increase tolls until 2023, but this leaflet explains why we need to bring that forward.

The Effects of Covid

Like many other organisations across the country, the impact of the pandemic has left Tamar Crossings facing a significant financial shortfall. It has been particularly challenging for an organisation which had planned to continue operating on a break-even basis. The various lockdowns and the longer term changes in travel patterns like working from home have caused a major drop in the levels of traffic at both crossings - see graph on the left below. Traffic levels and income are still only around 90% of pre-Covid levels – and at current toll prices this represents around £1.4 million a year of lost income.

By the end of 2020 our reserves had already been fully depleted, but fortunately the Government came to our aid and provided some financial support totalling approximately £3m which has offset some of the losses, but even with this help we are still around £3m worse off than pre-Covid forecasts. There is currently no prospect of further support from Government, but the Joint Committee and the two Councils are continuing to lobby for that support.

Our income depends on toll prices and traffic volume. The maximum cash toll that we can charge for each type of vehicle is fixed by the Government but we can vary the discount that we give for pre-paid TamarTag crossings. Although 60% of crossings are paid for using TamarTags, over half of our income still comes from cash tolls.

As a result of the pandemic Tamar Crossings are now running at a loss and reserves will be fully depleted by the end of 2022. The Joint Committee has therefore been forced to make a decision to stabilise finances by reducing discounts, and apply to Government to increase cash tolls.

This leaflet explains how the operation, maintenance and improvement of the Tamar Bridge and Torpoint Ferry are funded. It also sets out the details of the proposal being put forward by the Joint Committee for addressing the financial shortfall and ensuring that we can continue to keep both crossings operating safely, reliably and efficiently.

What is the toll income spent on?

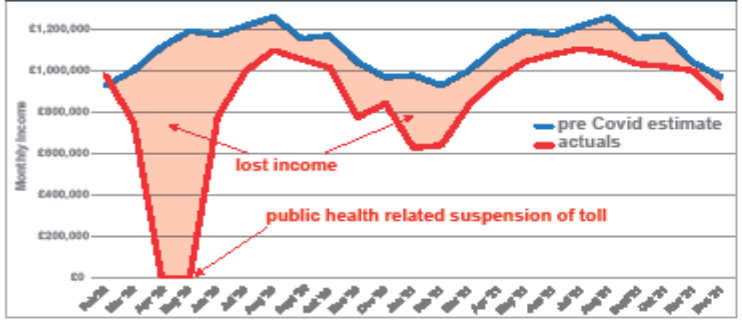
The money from the tolls is used to operate, maintain and improve the two crossings. Over 100 staff are employed to deliver the service 24 hours a day, 365 days a year at the two crossings. Despite the pandemic we have continued to fully operate and maintain the crossings to deliver this critical service, and our costs have actually gone up with the higher levels of inflation including energy and fuel prices.

During the past few years significant works have been carried out at the bridge and the ferries.

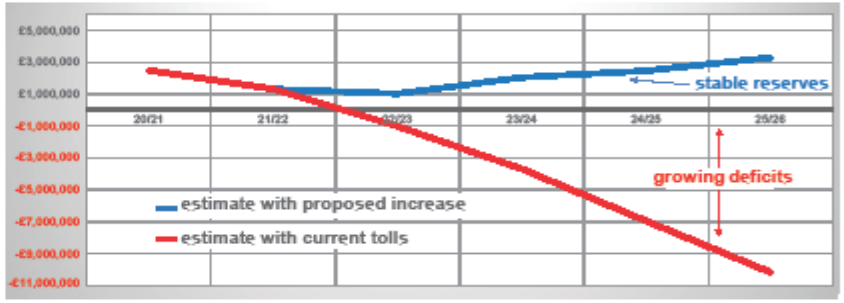
We have just finished major projects on the Bridge - painting, kerbs and resurfacing totalling nearly £17m. A major update of our tolling systems has also been completed, which included contactless payment at the toll booths, with plans to provide contactless payment at the Ferry in 2022.

At the Torpoint Ferry we have completed a cycle of refits for the three vessels and are gearing up for the next three-year cycle starting in 2023. During that next refit cycle we will also be replacing the chain gantries that support the tensioning weights for the chains. The refit cycle and the gantry work represent around £6m of investment.

Covid effect on monthly income



Reserves with and without toll increase



Leaflet 2

Why do you need to revise your prices at this difficult time?

Unfortunately the loss of traffic and therefore income caused by the pandemic means that without further funding support from the Government or a significant increase in traffic levels, we have no choice but to revise prices for the crossings as soon as possible. Both owning Councils are themselves in extremely difficult financial positions and are unable to provide financial support.

As things stand our only short-term option to increase income is to reduce pre-paid TamarTag discount. Increasing cash tolls involves applying to the Department for Transport under a formal statutory process, and typically takes several months to get approval.

Unless prices are revised soon, we will face a significant and growing financial shortfall which without intervention would lead to a reduction in services.

What is the proposal?

After considering and ruling out a number of potential options, including significantly reducing the ferry service and bigger toll increases of 35%, the Joint Committee is proposing a uniform 30% increase on TamarTag and cash tolls for all vehicle classes. The effect of this proposal on our finances can be seen in the graph on the right overleaf.

If a final decision is made to proceed with the increases, TamarTag tolls would most likely increase in May 2022, and at the same time we would submit an application to increase cash tolls which we expect could be implemented in January 2023.

The proposed 30% increase would apply to all vehicle classes, and would mean the TamarTag toll for a car would increase from £1 to £1.30, with the cash toll increasing from £2 to £2.60.

The final decision on revising prices is due to be made in March. However if circumstances change the proposal could be amended or halted at any time.

How you can have your say

We understand that this necessary proposal will be unwelcome but we want to hear the views of customers and other stakeholders to ensure that all relevant factors are taken into account in finalising any changes to toll levels.

To make sure your views are taken into account please complete the questionnaire and return it to us by **14 February 2022.**

You can also download an electronic version of the questionnaire from our website:

www.tamarcrossings.org.uk

where you can also find more information about the proposal.

Additional information can also be obtained by emailing us at

consultation@tamarcrossings.org.uk

or calling us on 01752 361577.

This document is available in other languages and accessible formats.

Please call or email using the contacts above.

@tamarcrossing

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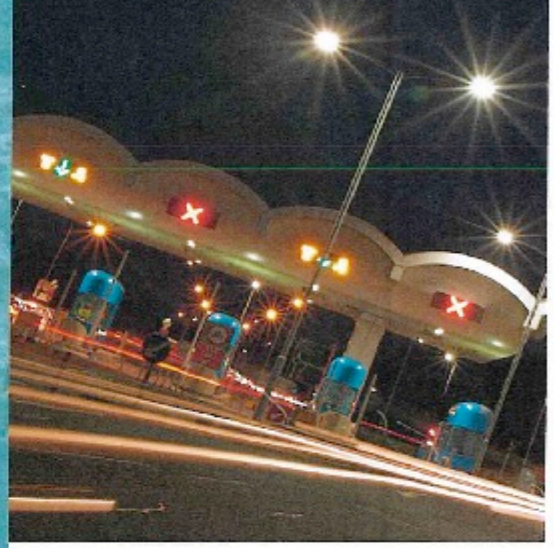
Tamar Crossings

FUNDING THE CROSSINGS

Consultation 2022



Cornwall Council

TamarTag

Plymouth

Questionnaire 1

Tamar Bridge and Torpoint Ferry Funding the Crossings

Tamar Crossings

Consultation, January 2022

Covid-19 has had a major effect on our toll income and the accompanying leaflet explains our current and forecast position. Please read the leaflet before completing this questionnaire.
Your responses to this consultation will ensure that all relevant factors are taken into account in finalising any changes to toll levels.

Section 1 Your use of the Tamar Bridge and Torpoint Ferry
Please provide an answer for both bridge and ferry

TAMAR BRIDGE Please tick one box only

1a How often do you usually travel across the bridge and/or ferry?

1 ☐ More than 5 times a week
2 ☐ 5 times a week
3 ☐ 1 – 4 times a week
4 ☐ Less than once a week
5 ☐ Less than once a month
6 ☐ Never

1b How do you usually travel across the bridge and ferry?

1 ☐ Private car/van
2 ☐ Light goods vehicle (eg Transit van)
3 ☐ Medium goods vehicle (ie 2-axle lorry)
4 ☐ HGV (ie lorry with more than 2 axles)
5 ☐ Motorcycle/scooter
6 ☐ Bicycle
7 ☐ Local bus
8 ☐ Walk
9 ☐ Do not use the bridge
10 ☐ Other _____

1c How do you currently pay to use the bridge and ferry?

1 ☐ TamarTag
2 ☐ Cash
3 ☐ Contactless card
4 ☐ Sometimes cash/contactless, sometimes Tag
5 ☐ Exempt/free
6 ☐ Do not use the bridge

1d Thinking about your most frequent journey using the bridge and ferry, what is the main reason for the crossing?

1 ☐ Commuting journeys (to and from work)
2 ☐ Business
3 ☐ Education
4 ☐ Healthcare
5 ☐ Recreation/leisure
6 ☐ Shopping
7 ☐ Do not use the bridge
8 ☐ Other _____

TORPOINT FERRY Please tick one box only

1a How often do you usually travel across the bridge and/or ferry?

1 ☐ More than 5 times a week
2 ☐ 5 times a week
3 ☐ 1 – 4 times a week
4 ☐ Less than once a week
5 ☐ Less than once a month
6 ☐ Never

1b How do you usually travel across the bridge and ferry?

1 ☐ Private car/van
2 ☐ Light goods vehicle (eg Transit van)
3 ☐ Medium goods vehicle (ie 2-axle lorry)
4 ☐ Motorcycle/scooter
5 ☐ Bicycle
6 ☐ Local bus
7 ☐ Walk
8 ☐ Do not use the ferry
9 ☐ Other _____

1c How do you currently pay to use the bridge and ferry?

1 ☐ TamarTag
2 ☐ Cash
3 ☐ Sometimes cash, sometimes Tag
4 ☐ Exempt/free
5 ☐ Do not use the ferry

1d Thinking about your most frequent journey using the bridge and ferry, what is the main reason for the crossing?

1 ☐ Commuting journeys (to and from work)
2 ☐ Business
3 ☐ Education
4 ☐ Healthcare
5 ☐ Recreation/leisure
6 ☐ Shopping
7 ☐ Do not use the ferry
8 ☐ Other _____

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Questionnaire 2

Section 2 Your views on the Bridge and Ferry Price Structure

As things stand our only short-term option to increase income is to reduce pre-paid TamarTag discount. Increasing cash tolls involves applying to the Government under a statutory process, and typically takes several months to get approval. Currently our customers pay different amounts depending on what vehicle they drive and whether or not they pre-pay using a TamarTag account. There are potentially different ways in which tolls can be varied, and this section invites your views to inform the toll application. We also want to know how your travel may change in the future.

1 We could charge differently by the time of day or the day of the week to help manage demand. Should we:

Please tick one box

1 ☐ charge more for travelling during peak times
2 ☐ charge more for travelling during off-peak times
3 ☐ increase charges uniformly

2 We could have different prices at the Bridge and Ferry to reflect the higher operating costs at the ferry. Should we:

Please tick one box

1 ☐ charge more for using the Torpoint Ferry
2 ☐ keep the charges the same for both crossings

3 We could increase the pricing difference between bigger vehicles and cars to more accurately reflect the wear and tear on the crossings. Should we:

Please tick one box

1 ☐ increase the difference.
2 ☐ keep the current pricing ratios

4 We could change the discount we give for pre-payment using a TamarTag. Should we:

Please tick one box

1 ☐ reduce the percentage discount for TamarTag account holders
2 ☐ increase the percentage of discount for TamarTag account holders
3 ☐ keep the existing 50% percentage discount

5 We are in a climate emergency and we could reduce the impact on the environment if we encourage low emission vehicles by charging them less. Should we:

Please tick one box

1 ☐ reduce charges for vehicles with lower emissions
2 ☐ keep charges independent of vehicle emissions

6 Do you think that the pandemic will cause your travel patterns to permanently change?

☐ Yes, go to question 7 ☐ No, go to question 9

7 If you have replied yes to question 6, how do you think your use of the crossings will change?

1 ☐ less frequent
2 ☐ more frequent
3 ☐ at different times of day
4 ☐ using public transport less
5 ☐ less car sharing
6 ☐ walk more/cycle more

8 What do you think would cause this change in behaviour?

1 ☐ more home working
2 ☐ less work available/unemployed
3 ☐ less inclined to socialise
4 ☐ improve health/environment
5 ☐ using local suppliers
6 ☐ increased home deliveries
7 ☐ using public transport less
8 ☐ other_____

9 In order to help us analyse the responses, please provide your postcode: _____

10 Have you got any other concerns or suggestions on the charging structure or the service in general?

For further information please visit our website at www.tamarcrossings.org.uk
Please return using the pre-paid envelope provided by 14 February 2022

By submitting this form you agree that we will process your data in line with our privacy policy, which is available within the consultation pages on our website www.tamarcrossings.org.uk

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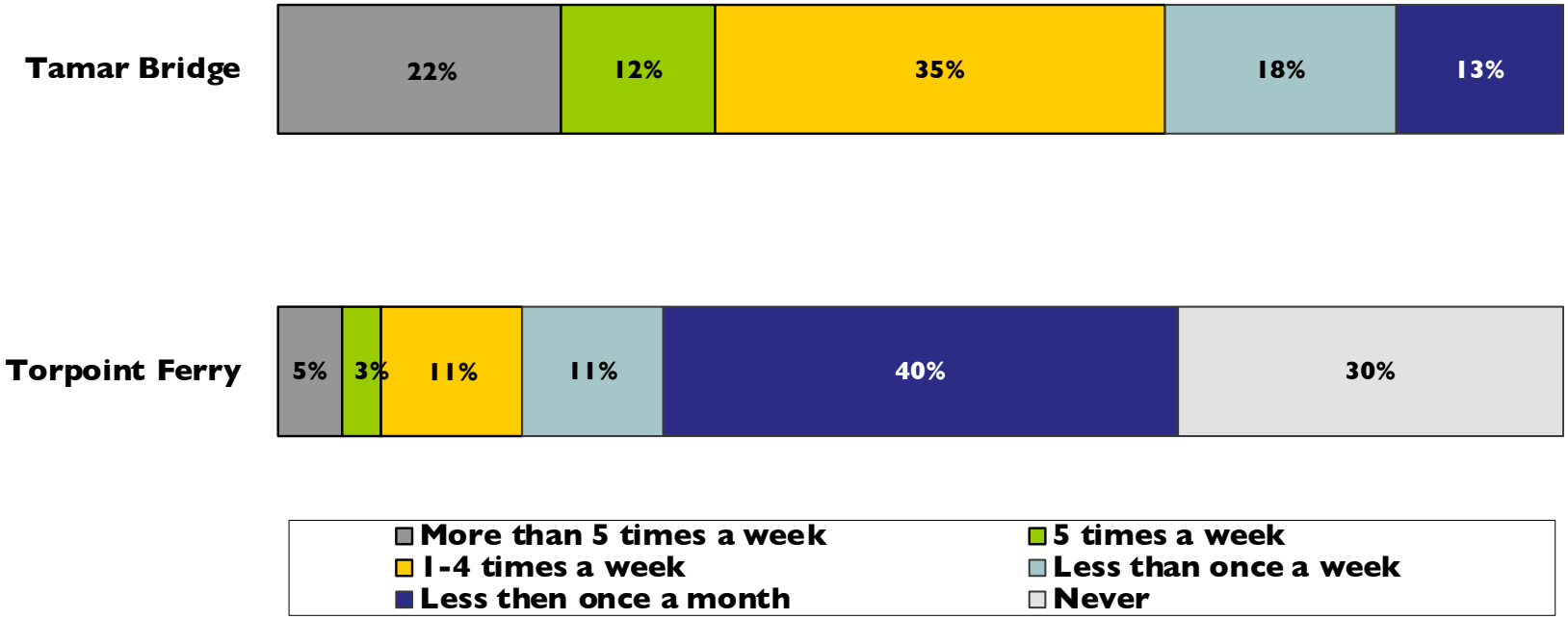
Behavioural data…

How often do you use the Bridge and / or Ferry?

- The respondents were more likely to use the Bridge more frequently than the Ferry. 70% of respondents indicated they either never used the ferry or used it less than once a month. The results were relatively unchanged from the 2020 survey. The frequency of crossing of those reporting use of each facility is illustrated below.



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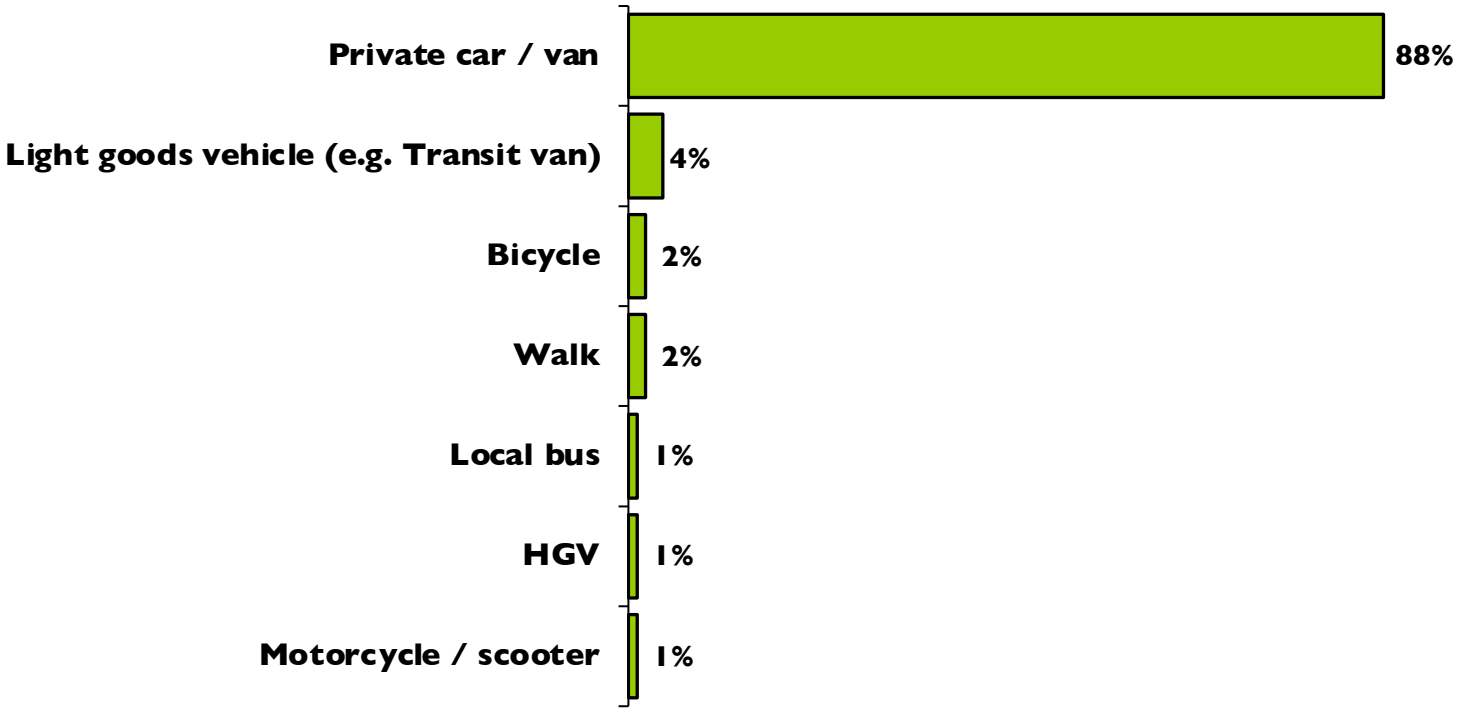
How do you usually travel across the Bridge?

- The majority of respondents travelled across the Bridge in a private car or van.
- Overall there was little difference from the 2020 results



Sample: 3849

Excludes: "Do not use"

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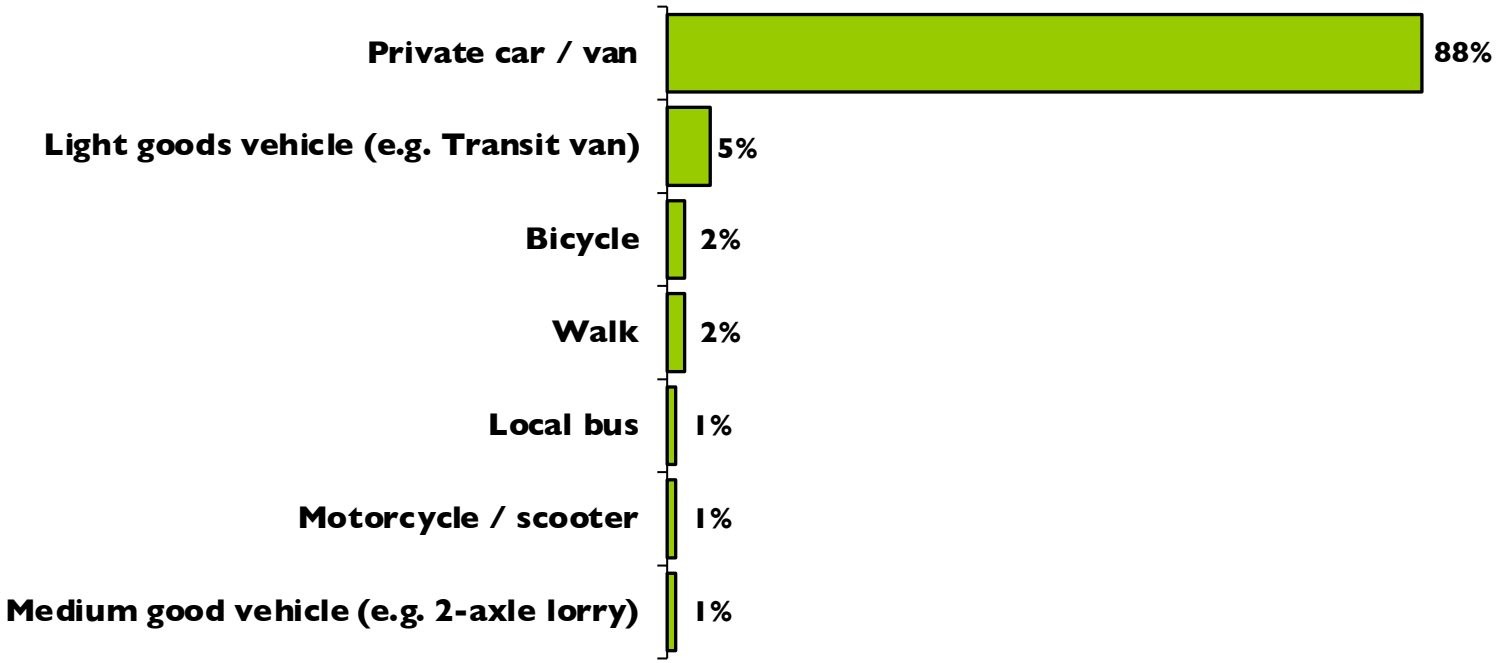
How do you usually travel on the Ferry?

- Again the majority of respondents used the Ferry in a private car or van.
- Those walking, cycling or using the local bus on the ferry remained unchanged. Overall there was little difference between the 2020 and 2022 results.



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Excludes: "Do not use"

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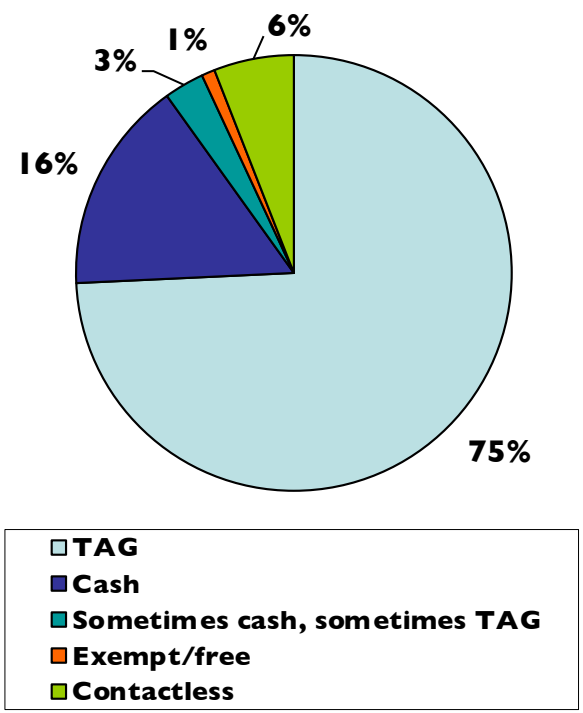
How do you currently pay to use the Bridge and Ferry? (Users)

- On both the Bridge and Ferry around three-quarters of respondents use the TamarTag.
- Compared to 2020 there has been a slight decrease in the proportion of respondents using the TamarTag (at both crossings) while the use of contactless for the bridge and use of cash for the ferry has increased slightly.

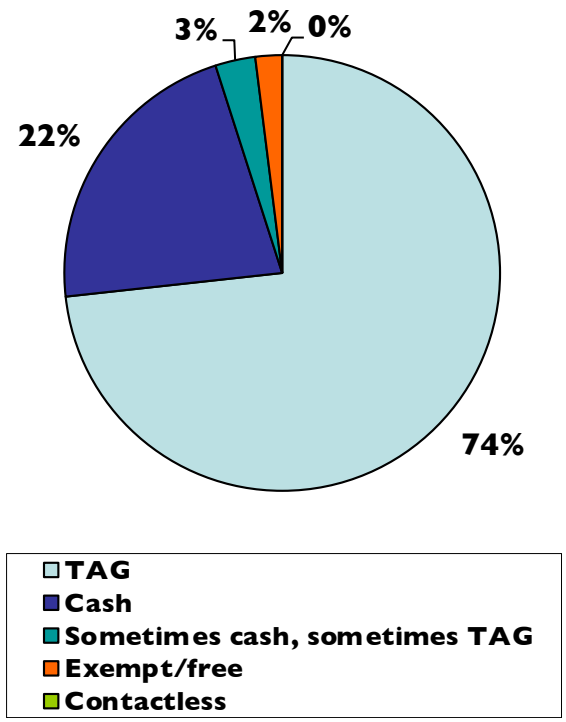
Bridge



Sample: 3708

Excludes: "Do not use"

Ferry



Sample: 2418

Excludes: "Do not use"

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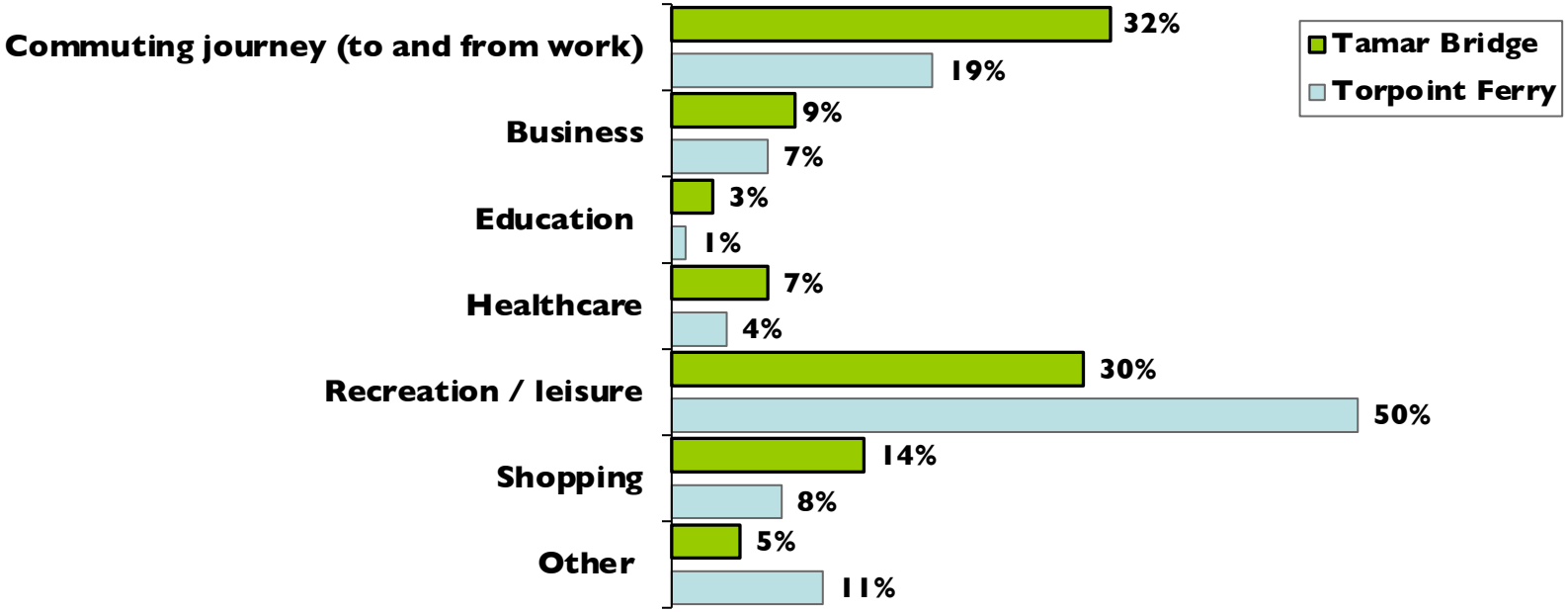
Thinking about your most frequent journey using the Bridge and Ferry - What is your main reason for crossing?

- Just under a third used the Bridge for commuting, while around a fifth used the ferry. This had decreased slightly (-5%) for the bridge and (-3%) for the ferry compared to 2020.
- Business use has remained the same as 2020 for the bridge and slightly down (-2%) for the ferry, while education and healthcare remained relatively unchanged
- At 50% of the total, those reporting that the reason for crossing the bridge was for recreation or leisure purposes increased by 3% points compared to 2020, while use of the ferry for recreation and leisure remained the same at 50%. Usage for shopping remained broadly the same as 2020.



Bridge sample: 3672
Excludes: "Do not use"

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Ferry sample: 2403
Excludes: "Do not use"

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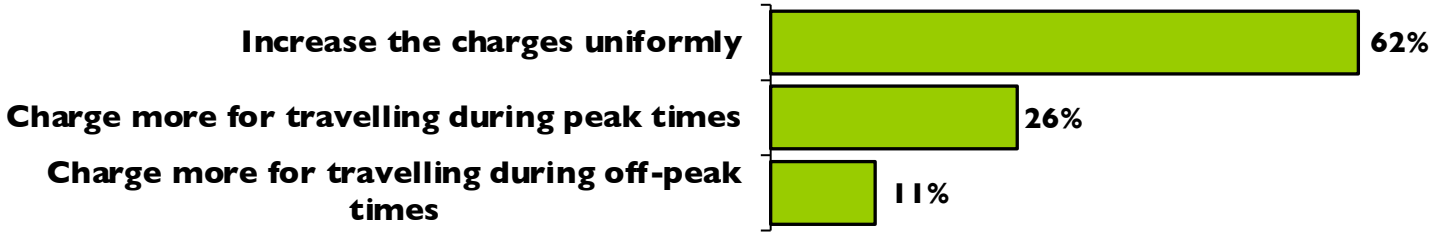
The Price Structure…

Should we charge differently by the time of day or day of the week?

- Just under two thirds of users indicated that charges should be “increased uniformly” suggesting that they did not want variable pricing - even if it could be used to help manage traffic flows.
- This sentiment is slightly higher (2%) than in the 2020 survey.
- Just over a quarter indicated that users should be charged more for using the crossings during peak times (-2% compared to 2020)



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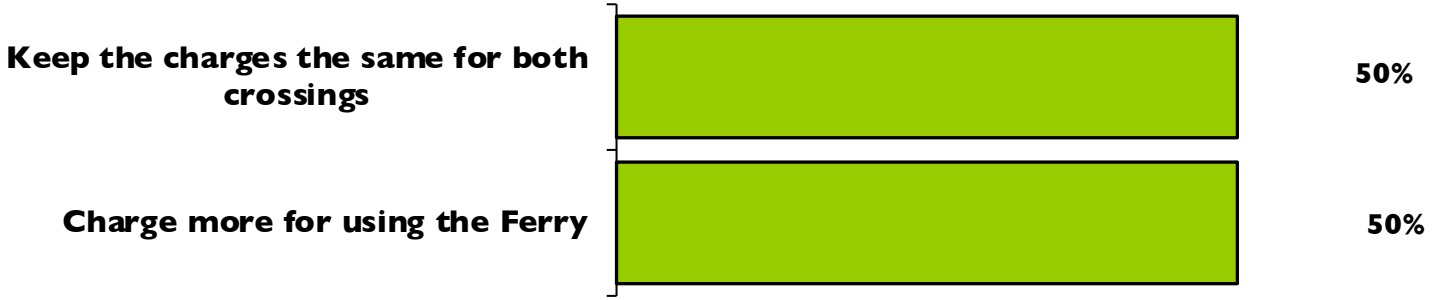
Should we have different prices at the Bridge and Ferry?

- 50% of users indicated that they wanted to keep the charges for both crossings the same - down by 8% from the 2020 survey.
- The support for charging more for the ferry crossing has increased from 42% in 2020 to 50% in this survey.



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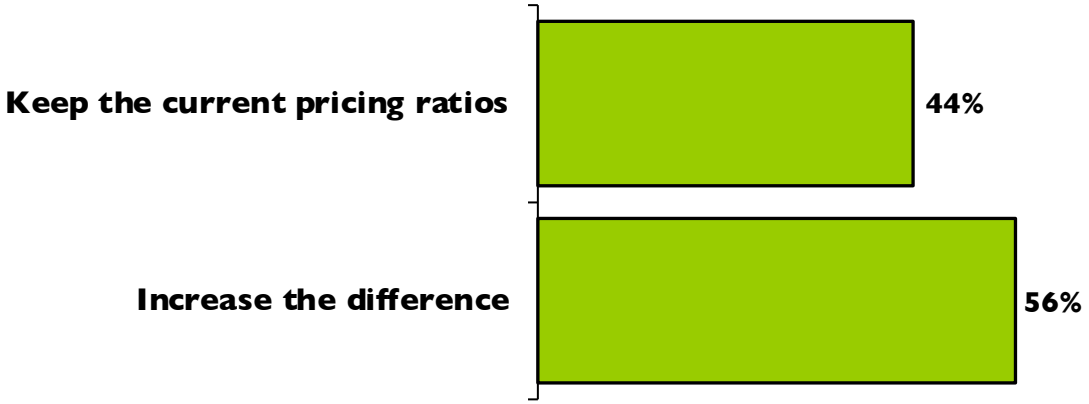
Should we change the pricing ratio between bigger vehicles and cars?

- 44% of users indicated that the current pricing ratio should be maintained, this has decreased from 63% in 2022.



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Should we change the discount we give for pre-payment using a Tamar Tag?

- Almost half of users (47%) indicated they wanted to keep the existing 50% discount for pre-payment using the Tamar Tag.
- A comparison with 2020 is compromised by the earlier exercise not including an option of increasing the percentage discount for Tamar Tag account holders. The 2022 survey resulted in 40% of respondents choosing this option.
- Those that want the percentage discount reduced has decreased from 18% to 14%.

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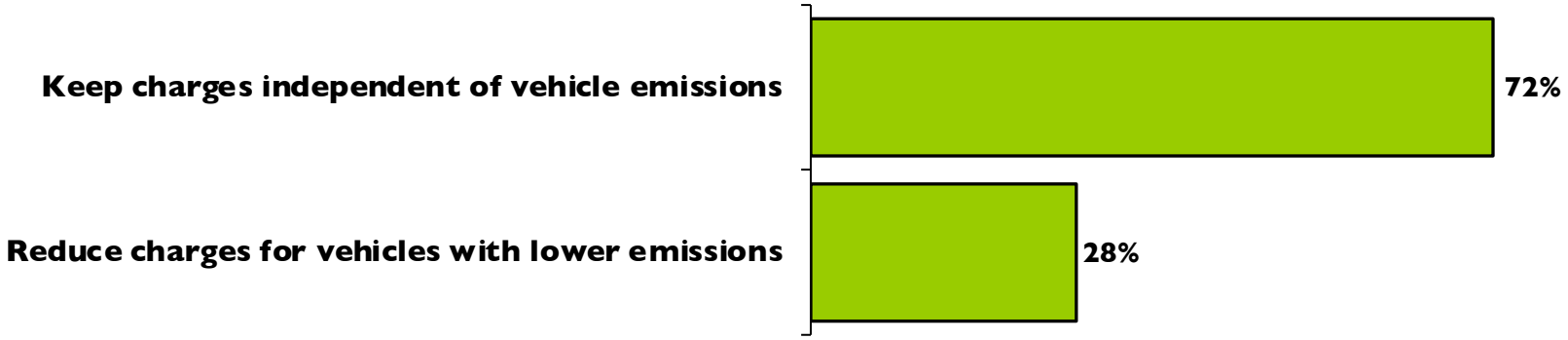
Vehicle emissions affect the environment – Should we help reduce our impact on the environment by encouraging low emission vehicles?

- 72% of users indicated that crossing charges should be independent of vehicle emissions. This is just slightly less than in 2020 (73%)
- Just under a third of users agreed that charges should be reduced for vehicles with lower emissions. The responses provide a similar result to a slightly different 2020 question which asked that respondents indicate whether charges should be higher for those with vehicles with higher emissions with 27% agreeing.



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The effects of the pandemic (COVID19) on users' travel behaviour…

Do you think that the pandemic will cause your travel patterns to permanently change?

- The number of users indicated that the pandemic would cause their travel patterns to permanently change was 16%. This has reduced from the number reporting a change in pattern in 2020 (24%). This indicates a move back towards more “usual” travel patterns for the majority.

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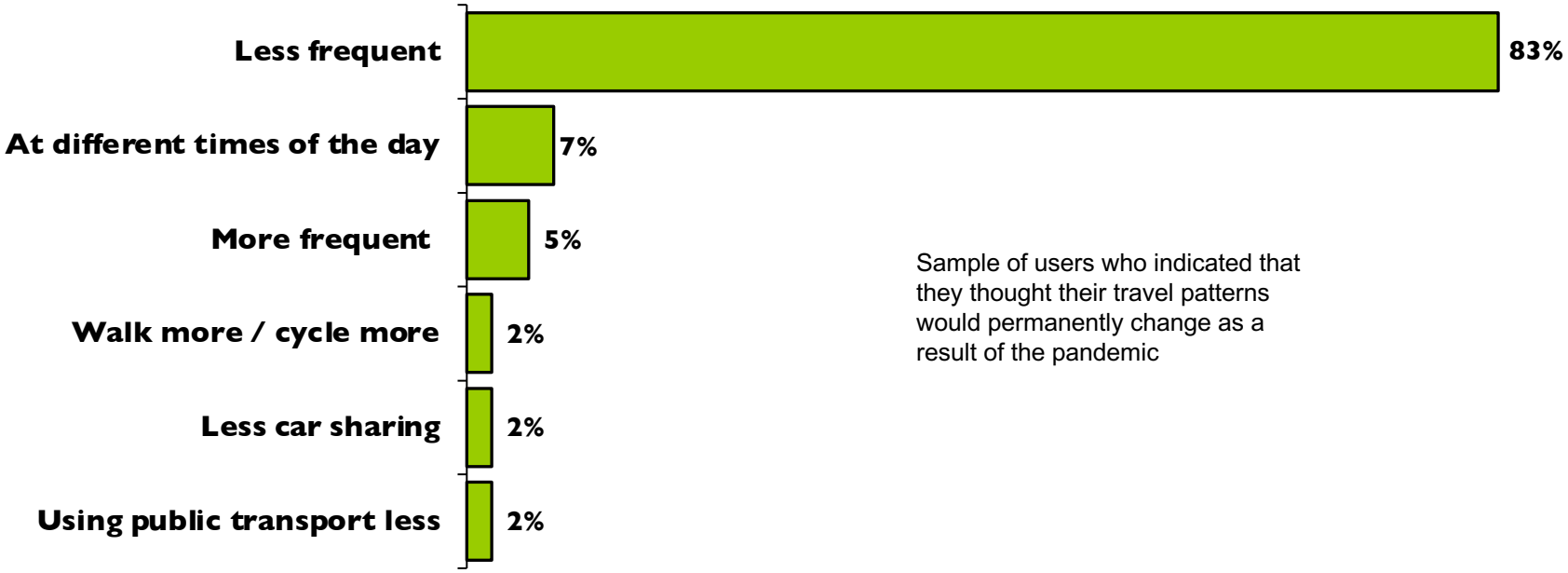
How do you think your cross-Tamar travel will change? (Users - who think the pandemic will permanently change their travel patterns)

- Of the 16% of users who indicated that they thought their travel patterns would change as a result of the pandemic, over 8 in 10 indicated this would be less frequently (a higher percentage than in 2020 but of a much smaller sample size) probably due to a continued degree of home working – see next slide.
- 4% indicated that they would use car sharing or public transport less (down from 8%)
- 2% indicated that when they cross the Tamar they would walk and cycle more(down from 6%)
- 7% said they would travel at a different time of the day (down from 14%).



Sample of users who indicated that they thought their travel patterns would permanently change as a result of the pandemic

Sample size varies

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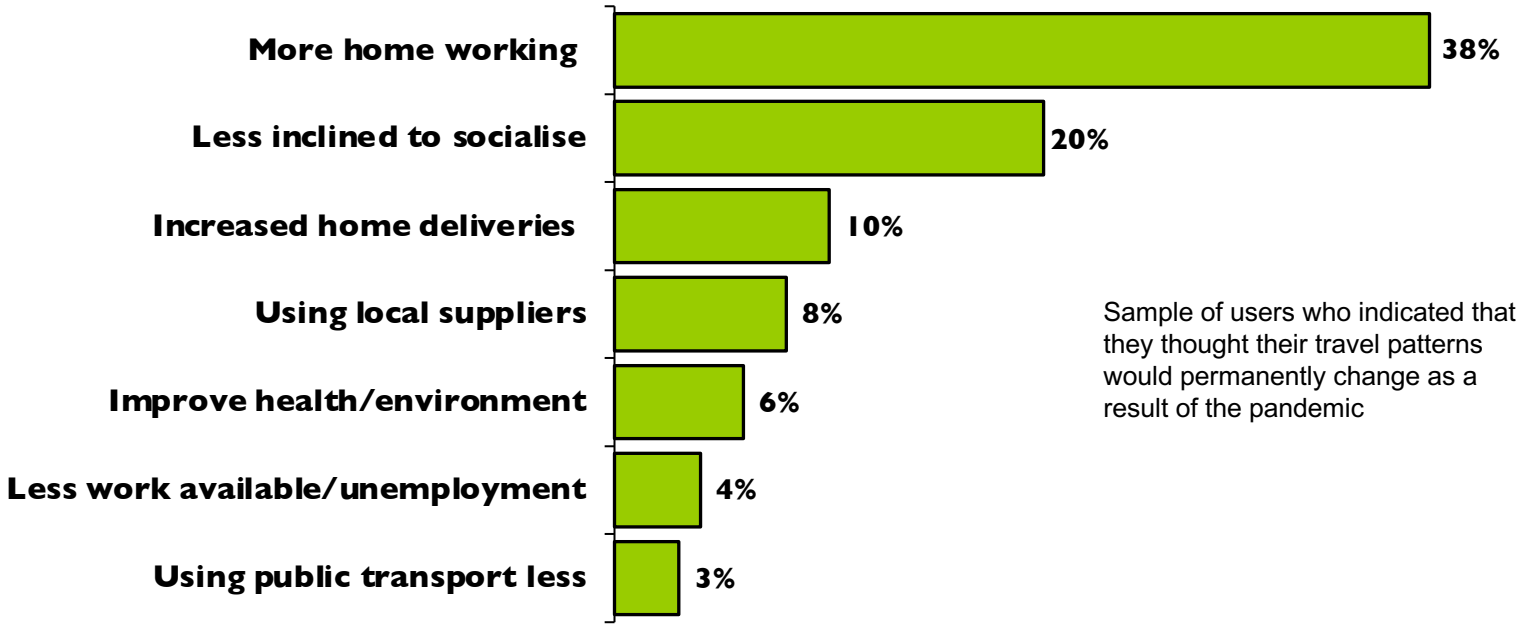
What do you think would cause this change in behaviour?

- An increase in the number of users indicating that the 'new normal' of more home working (up from 28%) was likely to cause a change in their travel behaviour.
- Encouragingly, those citing less work/unemployment has decreased from 11% to 4%
- There was no real change in the percentages mentioning that they are less inclined to socialise (20%), using more home deliveries (10%) and local suppliers (9%).
- The disinclination to use public transport has reduced slightly from 5% to 3%.



Sample of users who indicated that they thought their travel patterns would permanently change as a result of the pandemic

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Concerns or suggestions on the charging structure or the service in general…

Background on comments

- In total circa 30,000 users had the opportunity to make comments with 3,849 completing the survey.
- There were a total of 2,152 responses with comments. This equated to 56% of the total sample making a comment. Each respondent often made a number of points in their response.
- We have categorised the responses under appropriate headings to provide more clarity in the dataset and help summarise the overall attitudes towards the charging structure and service in general.
- We created a total of 14 categories and have reported the percentage of similar responses as a frequency of the total number of responses with comments. Each category is also supported with a number of comments which represent the overall attitudes of users to each category title.

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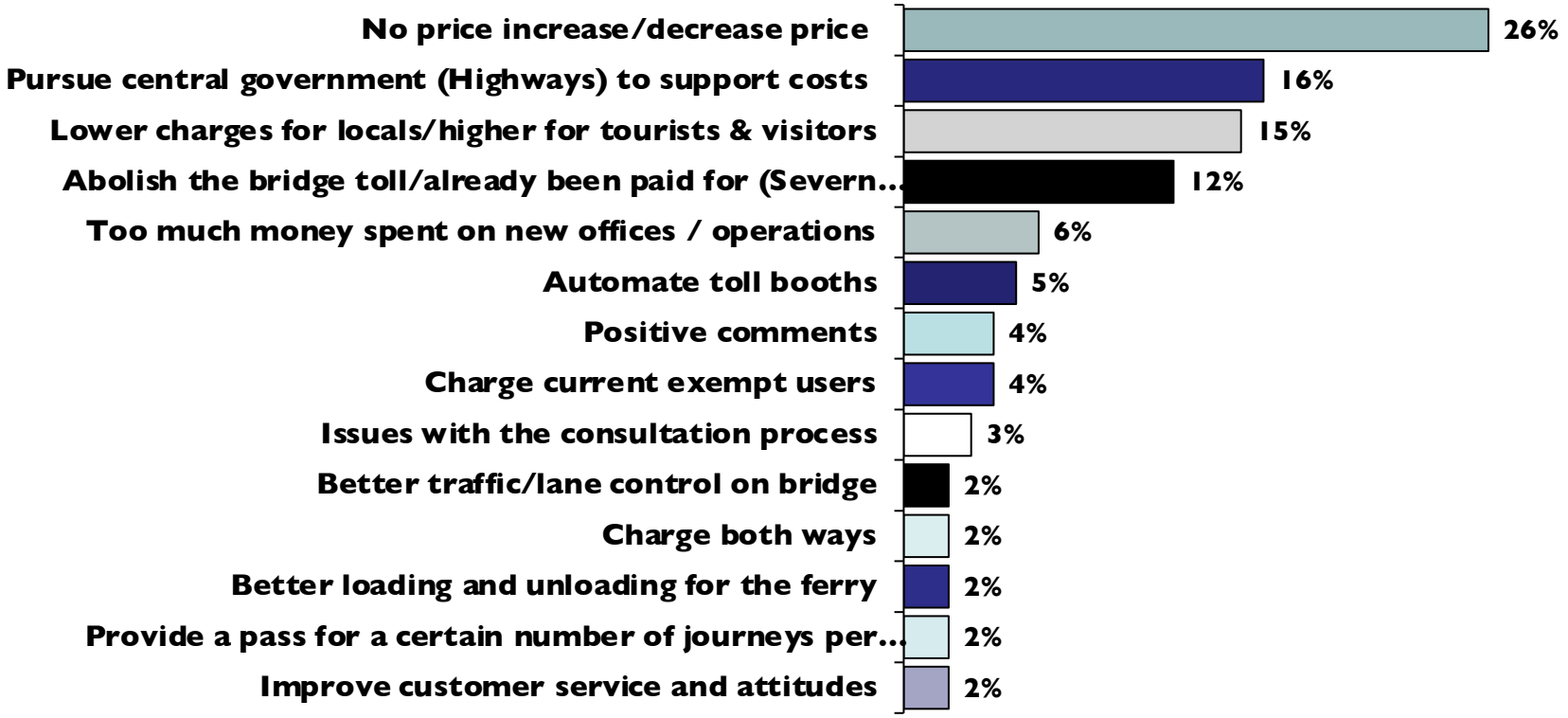
Main concerns or suggestions on the charging structure or service?

- Having no price increase, lowering the charges for locals, pursuing central Government or abolishing the toll altogether were common themes, which were also reflected in the 2020 survey. Requests for better lane control has dropped from 8% to 2%. However, positive comments have reduced from 10% to 4%. A new category for providing a journey pass has been included this year.



Sample: 2152

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No price increase…

- **No price increase / decrease price (26%)**

- "Inflation is going up, the general cost of living is going up, we are all having to cut out cloth accordingly and any increased costs are poorly timed and unwelcome."

- "In the economic climate, people are struggling with household bills an Increase in this would cause more hardship"

- "People in Saltash and neighbouring villages have no other option but to use the bridge facility and therefore any increase will have a significant impact on their finances. In a period of huge financial pressures on the average family (energy / food / living costs all increasing) the continued price increasing of the bridge will soon drive people from these towns in favour of moving into Plymouth. If you consider a normal family we're both adults work in Plymouth 5 or 6 days a week this cost is significant £1000s"

- "Prices must not increase, we are being penalised for the pandemic where tolls were suspended for a prolonged period."

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Pursue the government for funding…

- **<u>Pursue central government to support costs</u> (16%)**
- "I feel that Highways England, the Government should take over the care and maintenance of the crossings. Toll crossings should be scrapped completely"
- "I think you should consider lobbying the Government to subsidise the costs for ongoing maintenance. Or even better, make it free like the bridge over the Severn"
- "The A38 is part of the Strategic Road Network and should be funded via National Highways. The local MPs should be taking this argument to Parliament"
- "Is there no chance to explore having the crossings adopted by the Government/Highways Agency (as per the Severn Crossings) so that tolls could be abolished in the future?"

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Lower charges for locals

- **<u>Lower charges for locals – higher for tourists / visitors</u> (15%)**

- "Those living or working in Cornwall have to use the bridge and thus shouldn't be charged as much as tourists/visitors."

- "I am extremely disappointed that you are going to increase crossing prices for Tamar tag holders earlier than non-holders. Locals tend to hold the tag and cross the bridge for work and have to cross the bridge you are seriously impacting local people. Tourists and casual users should be charged more."

- "Locals should be free or heavily discounted, tourists should be higher fees. This bridge has more than made its money over the years!"

- "Charge non tag users at peak times more."

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Abolish the Bridge toll – already paid for

- **<u>Abolish the Bridge toll – already paid for (like Severn Bridge)</u>(12%)**

- "Since the bridge link into Wales is now free we believe the Tamar Bridge should be free into Cornwall. The Tamar Bridge and Torpoint authorities should see this as an ideal to be pursued."

- "Why are we still paying so much for the bridge when surely it must have been paid off by now? Is it because the Torpoint Ferry is so costly - simple - charge more for what the actual running costs of the ferry is (those that need it - pay for it) and then the bridge would be a lot cheaper."

- "Why are we still paying tolls for our crossings when tolls for the bridge into Wales is finished"

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Charge others / Charge both ways…

- **Charge exempt users** **(4%)**

- "Foot Passengers could be charged a fee for use of the ferry"
- "Charge for motorbikes and scooters (keep bicycles and pedestrians free)."
- "I would like to suggest that you charge for pedal cycles and foot passengers".

- **Charge both ways** **(2%)**

- "Why not charge in both directions?"
- "If ferry more expensive why not toll both directions at current price?"

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Operational comments on the Bridge…

- **<u>Automate the toll booths</u> (5%)**

- " What about getting rid of the staff/ booths and putting a cash/payment point like they use to on the Severn bridge, therefore you would save on costs in the long run?"

- "Consider an automated toll booth system. All booths could be open 24 hrs a day...no staffing issues."

- **<u>Better traffic / lane control on the Bridge</u> (2%)**

- "Manage the area just before the booths better. (a) Use hacked yellow markings to discourage people getting too close which causes disruption when someone joins wrong queue or whatever. (b) Use cones or staff to channel the two queues before booths more efficiently. Efficiency affects willingness to pay charges."

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Operational comments on the Ferry

- **<u>Better loading and unloading for the Ferry</u> (2%)**

- “make sure your employees are ready to load vehicles onto the early morning ferries so they leave on time, not early but more importantly not LATE”

- “No but if the Ferry was more reliable or loaded correctly at all times people may not mind so much paying. It costs out time at work with being late regularly and costs In petrol if we have to drive around.”

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General comments on the operation and consultation…

- **Too much money spent on new offices / operations** **(6%)**

- "Its a shame all that money was spent on the new office block. The wasted cash could have carried things through the pandemic which I see as a poor excuse for a Toll rise. The visitor centre is unlikely to be used by regular bridge users that are funding it for a few tourists."

- "The Torpoint ferry should be a separate company from the Tamar bridge."

- **Issues with the consultation process** **(3%)**

- "This survey is biased only allowing respondents to agree with your proposals. There are no "disagree" options."

- "Your questions have been structured in such a way that I have no choice but to accept the idea of a price increase"

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General comments on the operation and consultation… (2)

- **Improve customer service and staff attitudes** **(2%)**

- "Customer service is non existent, I have never had replies from several emails last year, and from what I hear locally new tags are unavailable. Poor service at best let alone with price rises."

- **Provide a pass for a certain number of journeys (2%)**

- "You could operate a bulk ticket operation like parking scratch cards"

- "Prefer Tag to deduct like cash and return any credit monthly automatically"

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Positive comments….

- **Positive comments… (4%)**
- “Just keep doing what you’re doing, you all do an amazing job in all weathers.”
- “I personally think you do a fabulous job, the service you provide is top notch, especially if your car breaks down on the bridge! Thank you.”
- “No concerns - the crossing is an excellent service and good value for money.”
- “It's good to see that customer service has improved.”

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Summary

Summary 1

- A statistically robust sample has been obtained using a variety of distribution techniques to achieve a representative sample of crossing users. The survey was completed using a self-completion questionnaire.
- This research indicates considerably more frequent usage of the Tamar Bridge – by private car or van, mostly driven by the difference between 'most typical' journey type – more Bridge users claiming to commute, while Ferry users claimed higher overall likelihood for recreational and leisure travel.
- However, amongst 'frequent' users of each service the likelihood to commute is the same. 70% of respondents indicated they either never used the ferry or used it less than once a month.
- Around 88% usually travel across the Bridge or on the Ferry by private car or van.
- At both crossings there was a slight decrease in respondents claiming to use the TamarTag as payment compared to the 2020 survey (from 79% to 75% for the bridge and from 77% to 74% for the ferry).
- The percentage paying by contactless has increased from 2% to 6%.

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Summary 2

- Just under 2/3rds of users indicated that charges should be “increased uniformly” rather than vary by time of day or day of the week, suggesting that they did not want variable priced tolling - even if it could be used to help manage traffic flows.
- There was a shift in sentiment regarding charging more for the ferry with 50% of respondents choosing this option, up from 42% in 2020.
- 44% wanted to keep the existing pricing ratios (based on vehicle size and weight)- which was down from 63% responding to a differently structured question in 2020. 56% wanted to increase the difference between bigger vehicles and cars.
- Many stated they wished to have no toll increase, citing previous recent toll increases and the hardships brought about by COVID’s effect on the economy. There was also continued support to pursue central Government (Highways) for support with 42% (combined) of the comments relating to these two points.
- Increasing the toll for tourists and lower charges for local residents and key workers also had support – representing 15% of the comments recorded.

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Summary 3

- Abolishing the toll as it has already been paid for represented 12% of the comments made.
- Whilst 47% of users indicated they wanted to keep the existing 50% discount for the pre-payment using the TamarTag, 40% chose the option of increasing the percentage discount for TamarTag account holders.
- 72% of users indicated that charges should be kept independent of vehicle emissions. This is similar to the 2020 figure (73%).
- 84% of users felt that their travel patterns would not permanently change as a result of the pandemic (up from 76% in 2020) indicating a return to more “normal” travel patterns.
- Of the 16% who thought that their travel patterns would permanently change, 83% felt that they would cross the Tamar less frequently, only 5% felt that they would cross more frequently. 2% thought that they would walk or cycle more.
- Users indicated that the key reasons for this behavioural change would be the result of more home working (38% up from 28%) and being less inclined to socialise still even with no restrictions (20%). Using more home deliveries and local suppliers (18%) was also indicated as a factor.

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Summary 4

- Out of the 3,849 responses, 56% added comments written under the open-ended question. These were broadly classified into the following categories and are shown below in descending order of frequency :

No price increase/decrease price
Pursue central government (Highways) to support costs
Lower charges for locals/higher for tourists & visitors
Abolish the bridge toll/already been paid for (Severn Bridge etc)
Too much money spent on new offices / operations
Automate toll booths
Positive comments
Charge current exempt users
Issues with the consultation process
Better traffic/lane control on bridge
Charge both ways
Better loading and unloading for the ferry
Provide a pass for a certain number of journeys per week/month
Improve customer service and attitudes

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