



# Financing the Crossings Consultation

October 2023

Prepared for: The Tamar Bridge & Torpoint Ferry  
Joint Committee

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- Behavioural data
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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 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.

# Research methodology (1)

- In total circa 31,000 users had the opportunity to respond, together with members of the general public.
- 3,173 returns were received from users (1,582 postal, 1,591 online). This equated to a response rate of 10%. There were a further 4,003 responses from the general public via the online survey available from the Tamar Crossings website and 3 surveys received directly at Tamar's offices.
- The total sample size of 7,179 allowed analysis at the 95% confidence level with a margin of error of only +/- .93%.
- The user survey was completed over a two day period on Saturday the 7<sup>th</sup> of October and Tuesday the 10<sup>th</sup> of October 2023.
- A four page 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 controllers and ferry staff to travellers and passengers using the ferry and bridge (circa 15,350 travellers)
  - By post to 900 TAG holders for whom postal addresses were held
  - By email to 14,842 TAG holders for whom email addresses were held
  - Online via a “public” survey - accessible from the [www.tamarcrossings.org.uk](http://www.tamarcrossings.org.uk) web site.
- The consultation was open from the 7<sup>th</sup> of October up to and including the 31<sup>st</sup> of October 2023.

# Research methodology (2)

## Reporting

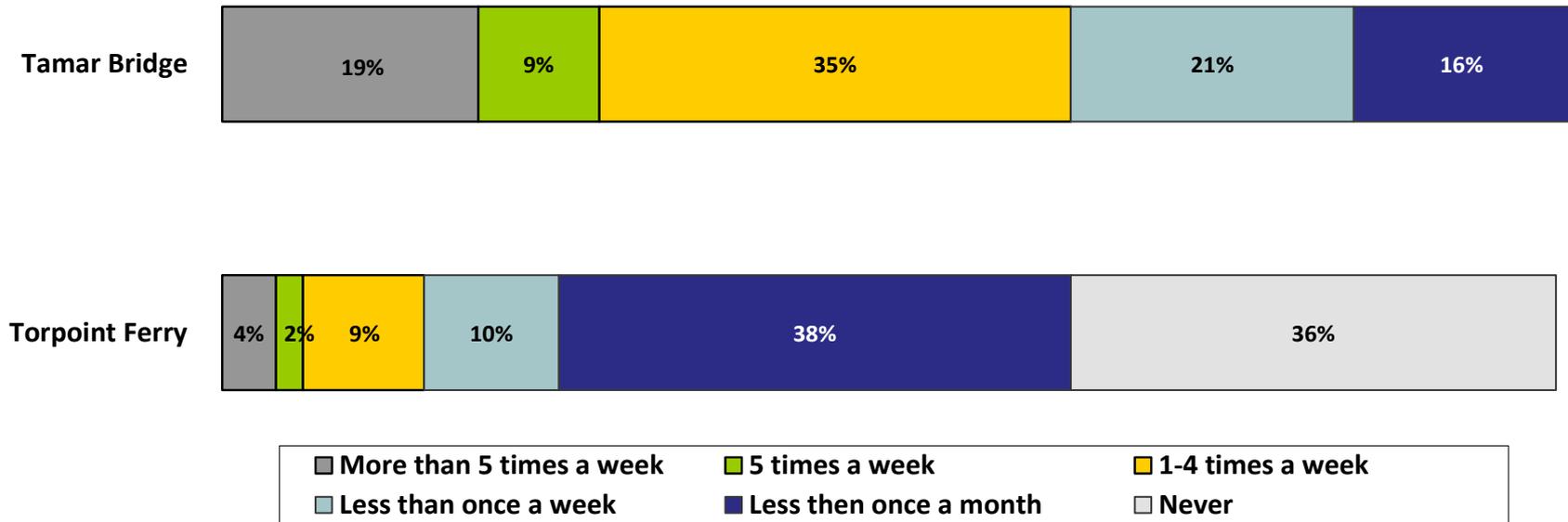
- This report summarises the results from the on-line and postal self-completion surveys which have been combined for analysis purposes.
- Sub analysis has been completed and where there is a significant difference between the total sample and Tag users this has been reported by exception. Where the commentary on the slides refer to all the respondents this relates to the total sample (including Tag users).
- Comparisons have also been made to the 2022 survey which used the same methodology.
- 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.



# Behavioural data...

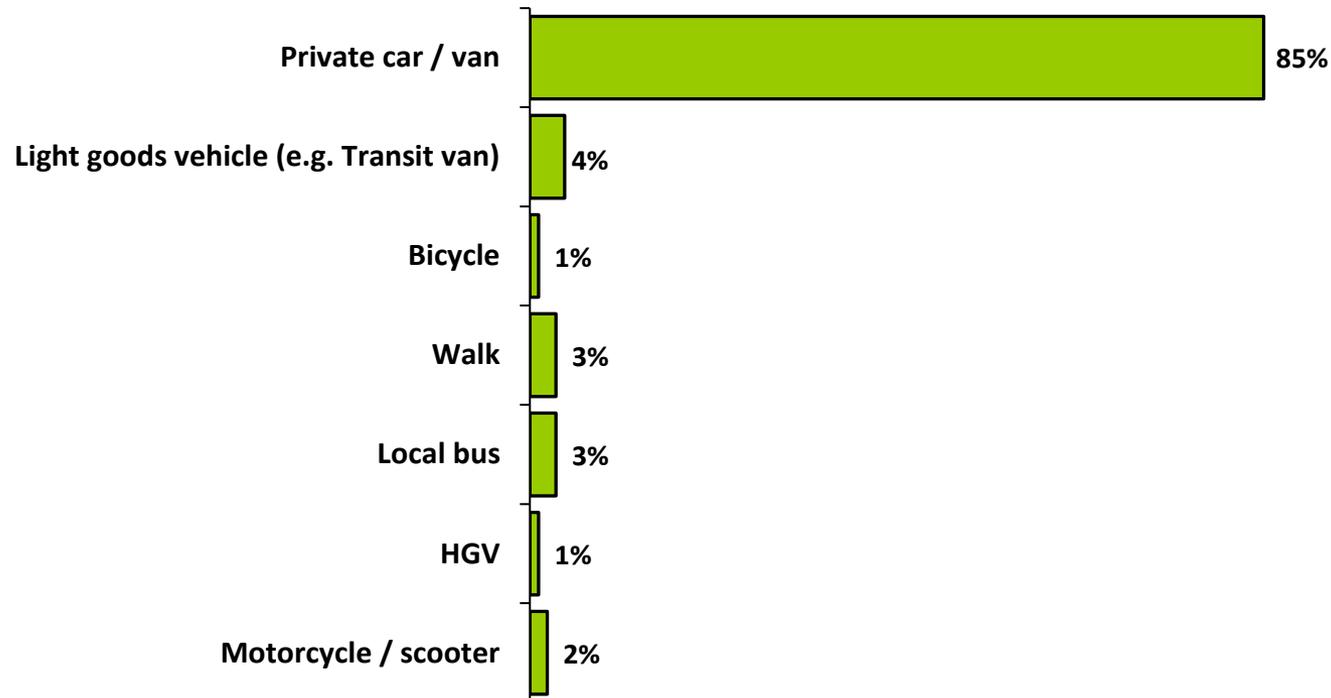
# How often do you use the Bridge and / or Ferry?

- The respondents were more likely to use the Bridge more frequently than the Ferry.
- 38% of Tag users travel across the bridge - more than 5 times a week / 5 times a week, compared to 26% of the total sample.
- 74% of respondents indicated they either never used the Ferry or used it less than once a month.
- Both those using the Bridge more than 5 times a week / 5 times a week had declined by 3% compared to 2022, the remaining results were relatively unchanged from the 2022 survey.



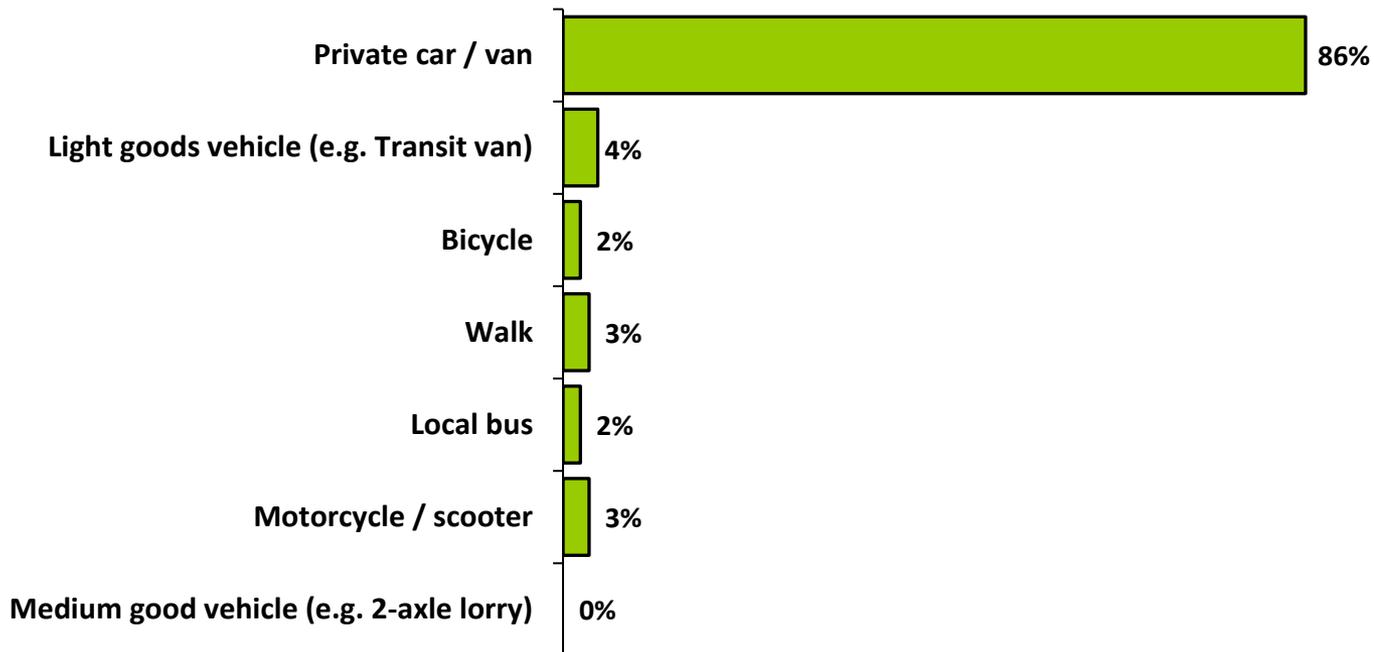
# How do you usually travel across the Bridge?

- The majority of respondents (85%) travelled across the Bridge in a private car or van.
- Traveling by car / van had declined by 3%, while using the local bus increased by 2% compared to 2022. Overall there was little difference from the 2022 results



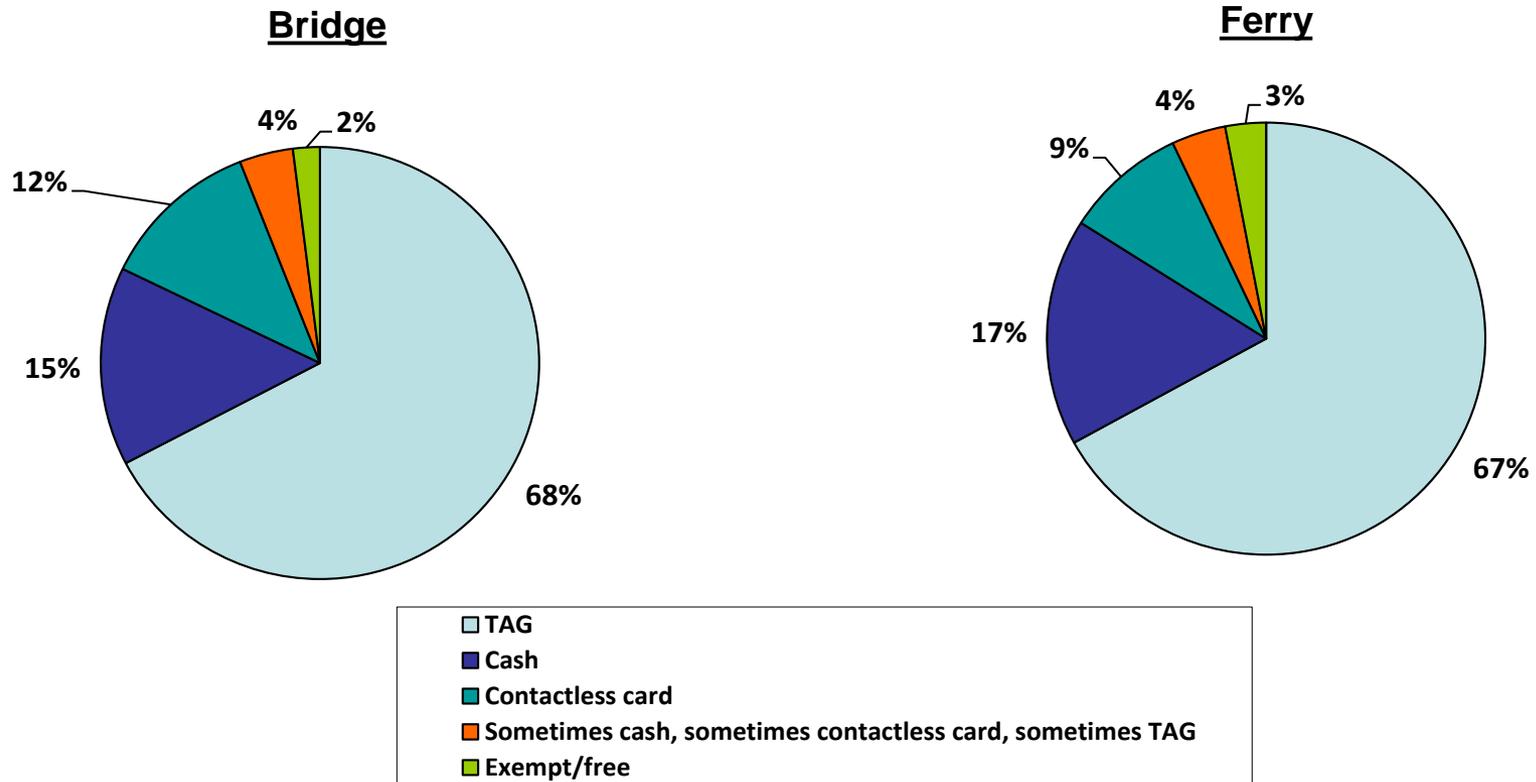
# How do you usually travel on the Ferry?

- Again the majority (86%) of respondents used the Ferry in a private car or van.
- Compared to 2022 there was a decrease of 2% in those using a private car or van to cross and an increase of 2% in those using a motorcycle / scooter and 1% in those walking. The remaining results were similar to the 2022 survey results.



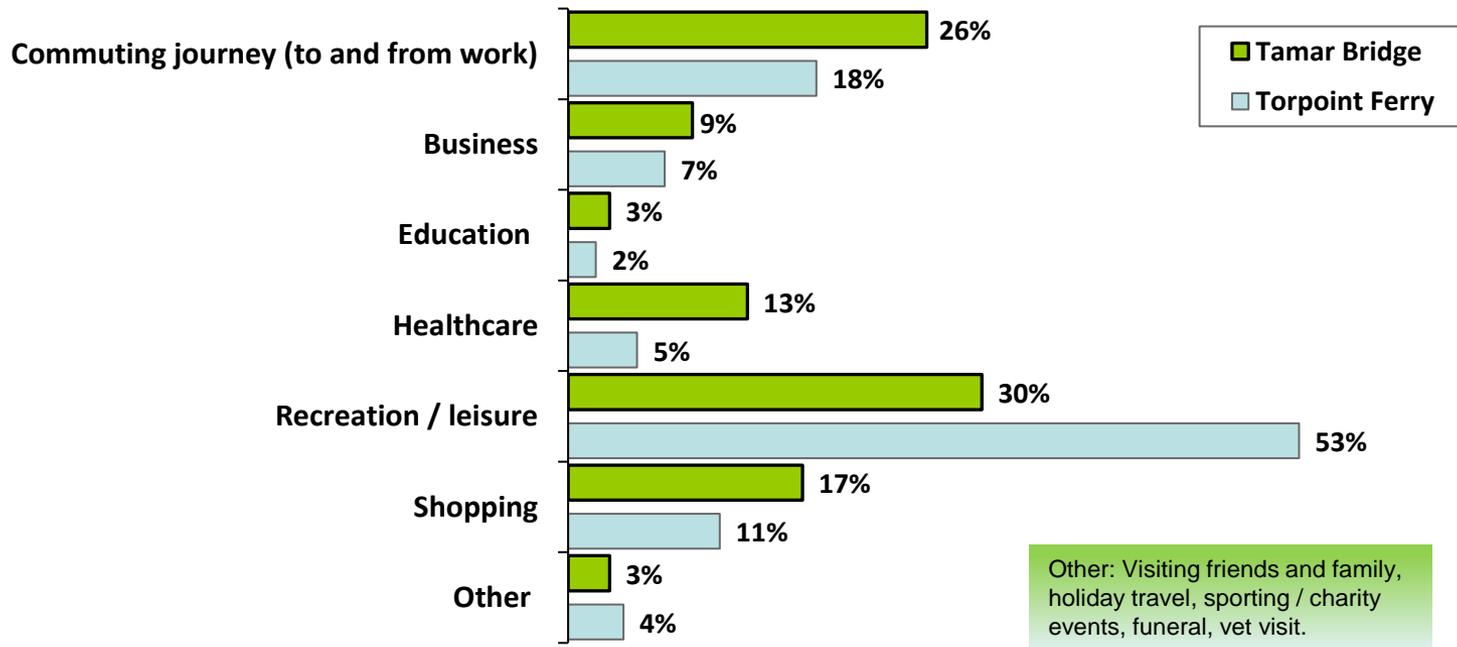
# How do you currently pay to use the Bridge and Ferry?

- On both the Bridge and Ferry just over 2/3rds of the total sample (circa 67%) use the Tamar Tag.
- Of the sample of Tag users, 98% use it to pay for the the Bridge and 95% for the Ferry crossing.
- Since 2022 there has been a 7% decrease in the proportion of respondents using the TamarTag (at both crossings) while the use of contactless has increased (+6% Bridge / +9% Ferry).



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

- Just over a quarter of the total sample used the Bridge for commuting, while just under a fifth used the ferry. This had decreased (-6%) for the bridge and slightly (-1%) for the ferry compared to 2022. This figure was higher for Tag users with 38% using the Bridge and 26% using the ferry to commute to work.
- Business use and access to education has remained similar to 2022 for the bridge and the ferry, while journeys to access healthcare have increased (+6%) on the bridge and (+1%) on the ferry.
- Compared to 2022, the ferry saw an increase (+3%) in its usage for recreation and leisure, while use of the bridge for this remained the same at 30%. Bridge & ferry usage for shopping both declined by 3%.

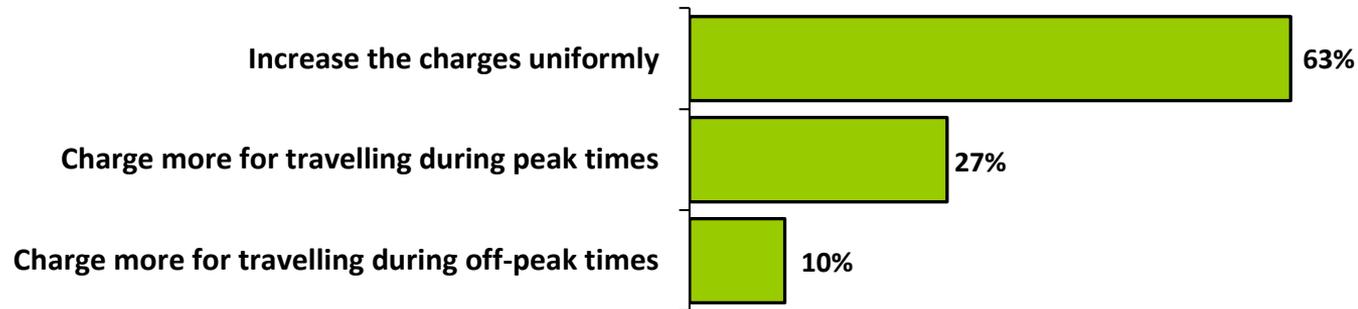




# The Price Structure...

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

- Just under two thirds of the total sample indicated that charges should be “increased uniformly” this rose to 67% among Tag users - suggesting that respondents did not want variable pricing - even if it could be used to help manage traffic flows.
- The results were very similar to the 2022 survey.
- Just over ¼ indicated that users should be charged more for using the crossings during peak times.



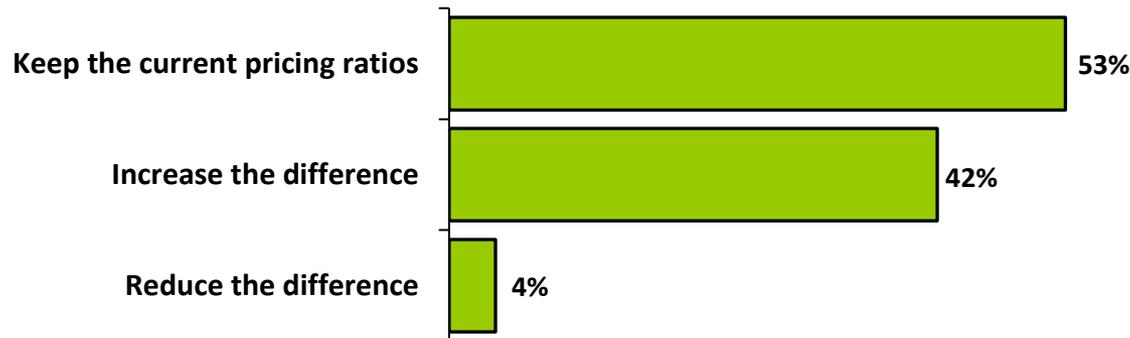
# Should we have different prices at the Bridge and Ferry?

- The support for charging more for the ferry crossing has increased from 42% in 2020 to 50% in 2022, and to 56% of the total sample in this survey.
- 60% of Tag users wanted to charge more for using the ferry.
- 44% of users indicated that they wanted to keep the charges for both crossings the same - down by 6% from the 2022 survey.



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

- Just over half (53%) of the total sample indicated that the current pricing ratio should be maintained, this has increased by 9%, from 44% in 2022.
- There was almost a 50/50 split by Tag users – with 48% indicating that the current pricing ratio should be kept, and 50% indicating the difference should be increased.
- Around two fifths want the pricing ration between bigger vehicles and cars to be increased but this has decreased by 14% compared to 56% in 2022.
- The new option to reduce the difference was only indicated by 4% of respondents.



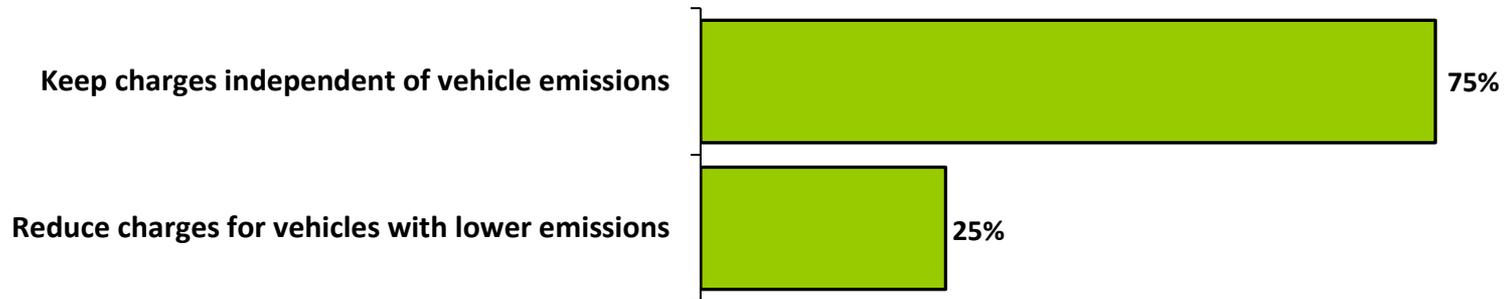
# Should we change the discount we give for pre-payment using a Tamar Tag?

- In 2020, the majority of users (82%) indicated they wanted to keep the existing 50% discount for pre-payment using the Tamar Tag. This decreased to 47% in 2022 and this is now 42% for the total sample.
- 44% would like to increase the percentage discount for Tamar Tag account holders (total sample and Tag users), up 4% from 2022.
- 47% of Tag users would like to keep the existing 50% discount.
- Those that want the percentage discount reduced has remained unchanged at 14% for the total sample but was 10% for Tag users.



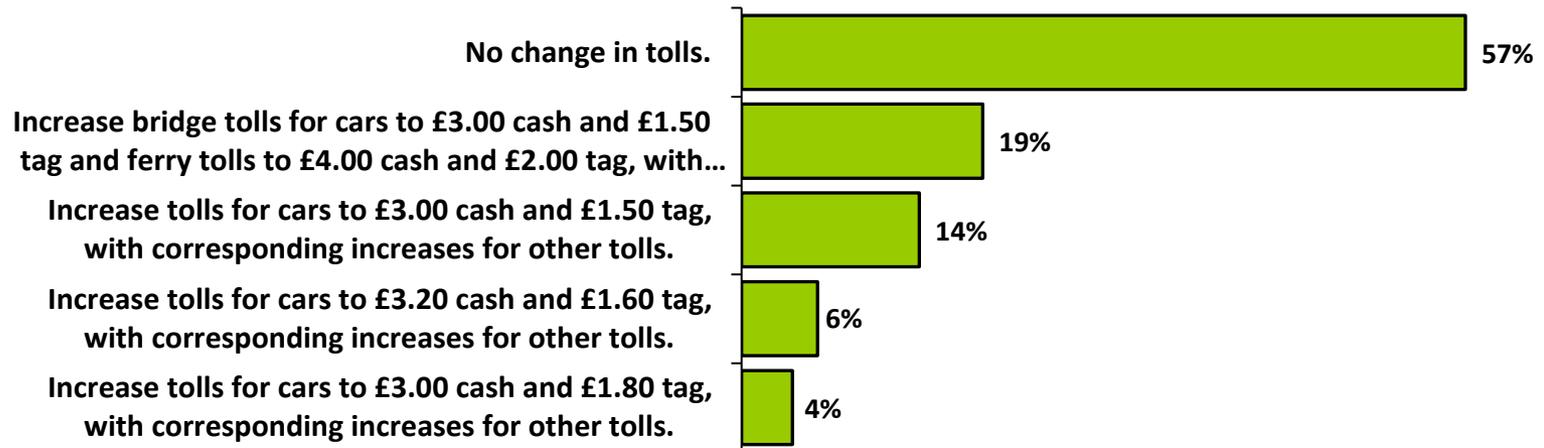
# Vehicle emissions affect the environment – Should we help reduce our impact on the environment by encouraging low emission vehicles?

- 75% of all respondents indicated that crossing charges should be independent of vehicle emissions. This is just slightly less than in 2022 (72%)
- A quarter of respondents agreed that charges should be reduced for vehicles with lower emissions, 3% less than 2022.



# Which do you think is the most appropriate to resolve the financial shortfall?

- Over half (57%) of all respondents indicated that no change in tolls should take place. This position was also supported by comments made in the verbatims recorded later in this survey.
- This percentage dropped to 42% among Tag users.
- However 43% of the total sample indicated that they would consider a different toll structure to help resolve the financial shortfall. This rose to 58% of Tag users.
- Around a fifth felt that increasing the bridge tolls (tag and cash) and increasing ferry crossing tolls (tag and cash) by a higher amount would be the most appropriate choice. This rose to 28% of Tag users
- This was also reflected in the 56% of respondents who also indicated that more should be charged for the ferry crossing to reflect its higher operating cost.





# Future travel behaviour...

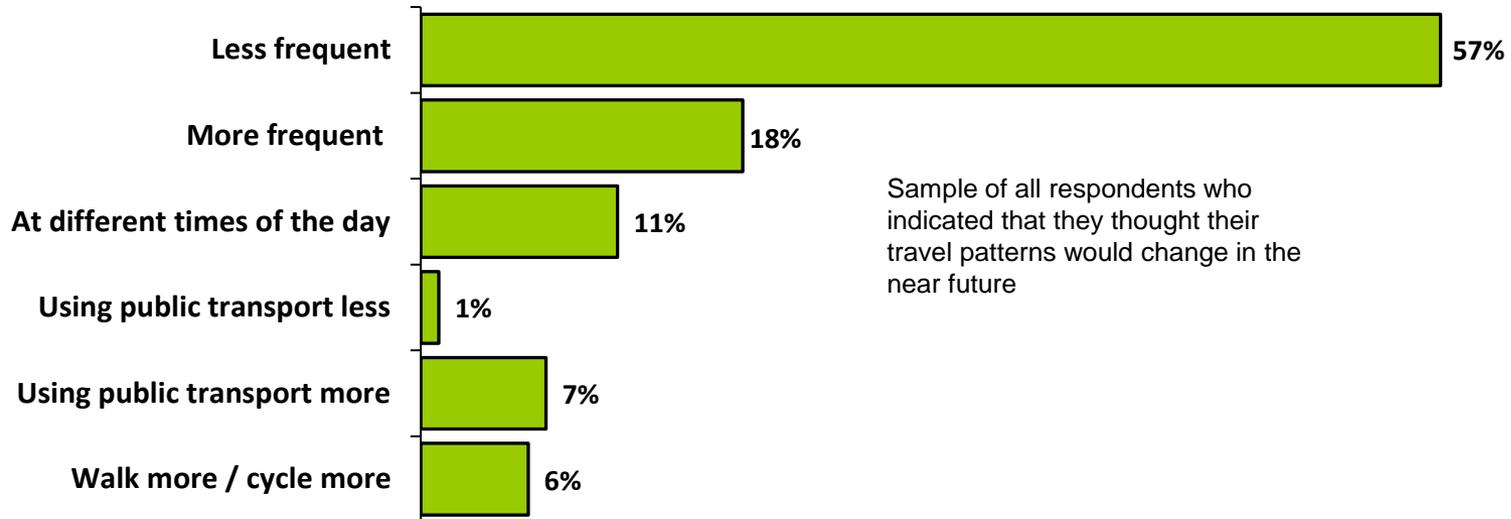
# Do you think your travel patterns will change in the near future?

- The majority (80%) of all respondents indicated that they did not think their travel patterns would change in the near future. This rose to 85% among Tag users.



# How do you think your use of the crossings will change?

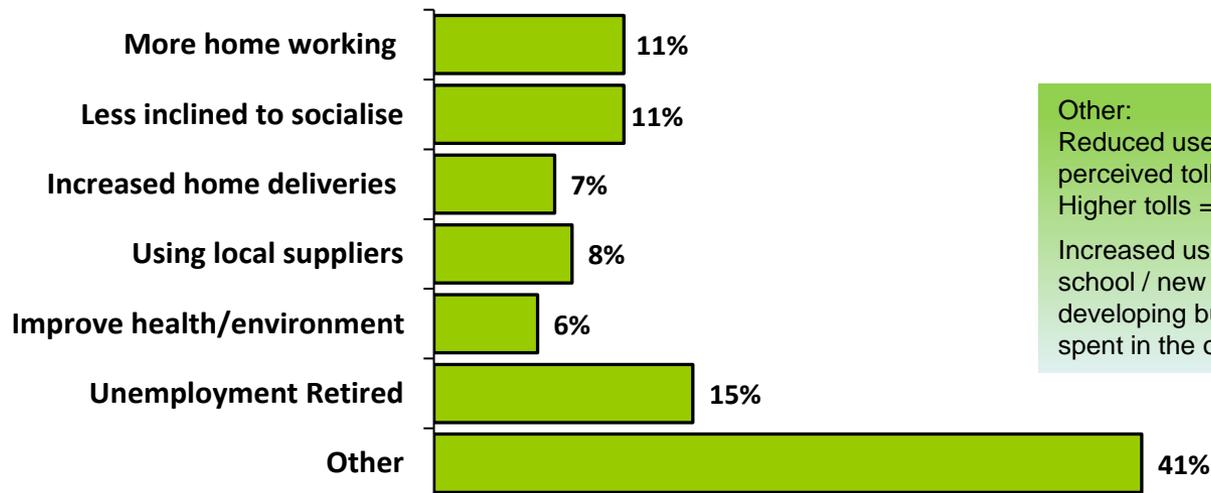
- Of the 20% of all respondents who indicated that they thought their travel patterns would change, well over half (57%) indicated this would be using the crossings less frequently.
- Among 15% of Tag users who also indicated they would travel differently, 71% indicated they would travel less frequently. A similar number of both the total sample and Tag users indicated they would travel more frequently.
- 11% said they would travel at a different time of the day (up from 7%). The number of those using public transport would increase on balance by 6% and 9% for Tag users.
- 6% of the total sample and 10% of Tag users indicated that they would walk and cycle more (up from 4% from 2022)



Sample size varies

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

- “Other reasons” accounted for a significant number of responses and the majority of these were linked to a reduction of usage because of the perceived increases in toll costs in the future.
- There was also a post Covid reduction in the number of all respondents (11%) who indicated that more home working was likely to cause a change in their travel behaviour (down from 38% in 2022) For Tag users this was 14%.
- Those citing unemployment or being retired increased from 4% to 15% (closer to 2020 -11%)
- Being less inclined to socialise was also a diminishing reason at 11% compared to 20% in 2022. Other areas were very similar to the 2022 survey.



**Other:**  
Reduced use of crossings - result of perceived toll increases in the future. Higher tolls = less usage.  
Increased use of crossings- change in school / new job/ caring for family/ developing business / more time now spent in the office in Plymouth.



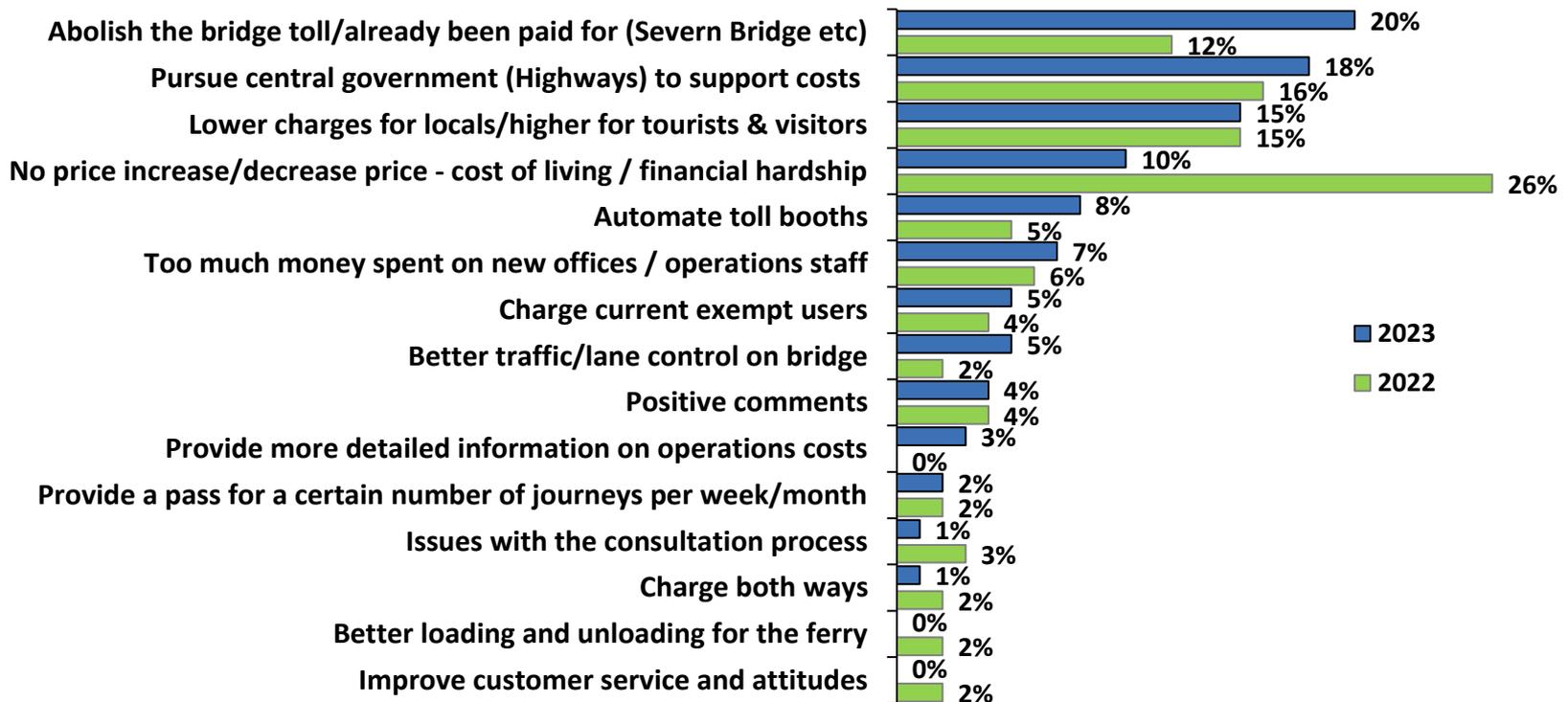
**Concerns or suggestions on the  
charging structure or the  
service in general...**

# Background on comments

- In total circa 31,000 users had the opportunity to respond, together with members of the general public.
- 3,173 returns were received from users (1,582 postal, 1,591 online). There were a further 4,006 responses from the general public, giving a total sample size of 7,179.
- There were a total of 3,742 responses with comments. This equated to 52% of the total sample making a comment.
- Each respondent often made a number of points in their response. Many of the comments made did not relate to the question asked and focused on the perceived social injustice and hardship they felt an increase in the toll would deliver.
- 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 15 categories and have reported the percentage of similar responses as a frequency of the total number of responses.
- These categories are also supported with a number of verbatim comments in the following pages, which illustrate the overall attitudes of users to each category title.

# Main concerns or suggestions on the charging structure or the service in general?

- The top four topic categories which attracted the most comments were unchanged from the 2022 survey. These were - abolishing the toll altogether, pursuing central government to support the costs, lowering the charges for locals and having no price increase / decrease in the price of the toll.
- However the sentiment had shifted from comments on no price increase / decrease price, towards abolishing the toll altogether (+8%) and pursuing central government to support the costs (+2%)
- Comments around using automated booths (+3%) also saw an increase.



# Abolish the Bridge toll – already paid for...

## Abolish the Bridge toll – “Its already been paid for” (Severn Bridge etc) (20%)

- *“Tolls on the bridge should now be scrapped - Abolish tolls on the bridge with immediate effect and hand over to highways”*
- *“The bridge should be free. How can bridges such as the Severn be free yet we are charged an astronomical amount for using the Tamar bridge”*
- *We should not have to continue to pay for the crossing, especially residents of Saltash who use the bridge for commuting. We should not have repeated increases in tolls. There have already been increases recently so why again now? Other bridges are maintained free of charge for the users, so why are we paying for this one?”*
- *“Tamar bridge fees should not increase any more, they have only just gone up. This is a major part of the national highways system and should be maintained with money from government. More effort should be put into bringing about this change which is long overdue”*
- *“Get rid of tolls completely. They are too expensive and there collection cause long queues and hold ups”*

# Pursue the government for funding...

## Pursue central government to support costs (18%)

- *“Please put pressure on MPs to press for government funding of the bridge. It is one of only 2 major routes into Cornwall and it would seem to be more equitable if the govt funded the A38 as it funds the A30”*
- *“Continue to strongly lobby Government, especially with an election year ahead. It is unacceptable that other important crossings across the UK are free but that users have to pay for the Tamar Crossings”*
- *“There have been too many increases in tolls. The crossings should be taken on by the government”*
- *“The bridge needs to be handed back to the Highways and booths removed”*
- *“Both the bridge and ferry should be paid for by the government. It is ridiculous that in other parts of the country, tolls are being cancelled and here they are increasing. it is indicative of how no one in government cares about the south west. There is no "levelling up" or "powerhouse" here and I fail to see why we subsidise other transport links around the country when we have a pitiful service here”*

# Lower charges for locals...

## Lower charges for locals – higher for tourists / visitors (15%)

- *“Tourists could be charged more. Locals are struggling especially with work and commuting - as well as wanting to enjoy both sides of the bridge”*
- *“You should consider making it cheaper to cross for locals as we have to use it every day - maybe charge visitors to the area more”*
- *“Tamar Bridge should be free for residents of Saltash who rely on daily travel to work”*
- *“There should be free use for local users - I’m only going to work and it’s costing me a lot of money. I shouldn’t be penalised as a resident of Saltash”*
- *It is ridiculous to still be charged such high rates! The tolls should be reduced not increased. Residents of Saltash should also get exemptions for having to put up with the constant traffic and disruption due to the hideous queues”*
- *“Local residents that work in the public sector like doctors, nurses, police, public servants etc. should not have to pay to cross the bridge to perform work duties”*

# No price increase...

## No price increase / decrease price - Cost of living / financial hardship (10%)

- *“Many people cannot afford the constant rising cost of tolls and some people cannot walk or use the bus due to disabilities”*
- *“It’s getting too expensive to use. As a single mum it’s frustrating having to pay out extra every month just to get to work”*
- *“No more increases should be made to cross the bridge. Should be made free by now”*
- *“Maybe consider locals have lower prices in a geographical area within like 10miles of bridge and everything after that charge more. So tag users that live closer have to pay less in general”*
- *“It’s far too expensive already!!! Locals should not pay!”*
- *“I think people living in Saltash or within a certain area should use the bridge for a significantly discounted price”*
- *“Tamar Tag prices should remain the same for locals”*
- *“Should be free for local residents i.e. in PL12 area as locals need to use the bridge for work and hospital etc.”*

# Charge others / Charge both ways...

## Charge exempt users (4%)

- *“Its about time you charged motorbikes and scooters”*
- *“Start charging pushbikes & pedestrians on ferry who currently receive a service for free”*
- *“Foot Passengers could be charged for using the ferry”*
- *“Remove the exemption for blue badge holders or offer a concessionary rate for them”*

## Charge both ways (1%)

- *“Charging in both directions would help?”*
- *“If the ferry is more expensive why not toll both directions at the same price?”*

# Operational comments on the Bridge...

## Automate the toll booths (8%)

- *“The Bridge needs to be more (effectively) automated which would massively reduce costs (staffing)”*
- *“What about an automated toll booth system. All booths could be open 24 hrs a day... - similar to Europe, with no staffing issues.*
- *“The use of ANPR technology should be adopted as a high priority to ease the almost continuous congestion to the toll booths”*
- *“If a tag doesn't work in a tag only lane, it must be the slowest walk across the booths, there could ever be. The man is not normally very helpful and certainly doesn't rush – leading to more queues and longer hold ups”*

## Better traffic / lane control on the Bridge (5%)

- *“The Tag Only lane on the northern end is often blocked causing tail backs on the northern lane from Saltash”*
- *“If you had a good car management system, we wouldn't need to queue for 20mins to get over the bridge”*
- *“Seems to be getting worse, with constant queueing.. regardless of time of day. Use camera's to register number plates, and send out payments, and get rid of kiosks”*

# General comments on the operation and consultation... (1)

## Too much money spent on new offices / operations (7%)

- *“Why was so much spent on a totally unnecessary over the top building on the St Budeaux side of the bridge as well as on an electronic tag/toll system that constantly fails to work and therefore still incurs staffing costs”*
- *“All systems should be automated there is no need in this day and age to have toll booths and staff in them. The cost savings you need are right there just modernise it's 2023”*

## Issues with the consultation process (1%)

- *“These questions are extremely biased forcing answers in favour of toll increases and are not set out in a fair way”*
- *“The above options favour increase charges and are therefore bias in that regard, there is no option to reduce the tolls”*

# General comments on the operation and consultation... (2)

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

- *“Maybe buy a ticket say for 10 crossings for those that don’t use it often, and only pay for 8”*
- *“Charges should be a fair price with a choice of single or return ticket with drivers also being charged to enter Cornwall. This could be achieved by advanced on line payment, like other tolls in the rest of the country”*
- *“Wouldn't a day pass ( allowing multiple journeys in one day) be a good way to let locals pass freely over the crossings?”*

# Positive comments...

## Positive comments (4%)

- *“You are doing a good job!”*
- *“Thank you for providing information on the current pressures as well as the opportunity to feedback on this essential service”*
- *“The bridge is well maintained and provides a positive service. I travel a lot overseas (France, a lot of tolls), people shouldn’t be afraid to pay for the service rather than feel entitled to it. The tag discounting system protects the locals who are most likely to be impacted, infrequent cash users then tourists etc. can afford the odd extra - maybe make it £3.50 / £1.50 instead? I don’t see a reason locals can’t all get tags. Just keep doing what you’re doing, you all do an amazing job in all weathers.”*
- *“On a positive note thank you to the workers who risk their lives making sure that the bridge is safe and to the ladies in customer service who take payment over the phone. Unfailingly polite and helpful”*
- *“Think bridge is managed well by the officers and staff. Please give my thanks to them”*



# Summary

# Summary 1

## Sample size and research methodology

- A statistically robust sample was obtained using a variety of distribution techniques to achieve a representative sample of crossing users.
- The total sample size of 7,179 allowed analysis at the 95% confidence level with a margin of error of only +/- .93%. The survey was completed using a self-completion questionnaire (online and postal).

## Travel frequency, mode and main reason for crossing

- The research indicates considerably more frequent usage of the Tamar Bridge – by private car or van, mostly driven by the difference between ‘most frequent’ journey type – more Bridge users claiming to commute, while the Ferry users claimed higher overall likelihood for recreational and leisure travel.
- Around 86% usually travel across the Bridge or on the Ferry by private car or van.
- 38% of Tag users travel across the bridge - more than 5 times a week / 5 times a week, compared to 26% of the total sample.
- Of the ‘frequent’ users of bridge (More than 5 times a week / 5 times a week) 50% use it for commuting journeys (to and from work).
- Overall over a quarter (26%) used the Bridge for commuting, while just under a fifth used the ferry. This had decreased (-6%) for the bridge and slightly (-1%) for the ferry compared to 2022. This figure was higher for Tag users with 38% using the Bridge and 26% using the ferry to commute to work.
- 74% of respondents indicated they either never used the ferry or used it less than once a month.
- Business use and access to education have remained similar to 2022 for the bridge and the ferry, while journeys to access healthcare have increased (+6%) on the bridge and (+1%) on the ferry.

# Summary 2

## Payment

- On both the Bridge and Ferry just over 2/3rds of the total sample use the Tamar Tag to pay for usage.
- Of the sample of Tag users, 98% use it to pay for the Bridge and 95% for the Ferry crossing.
- Since 2022 there has been a 7% decrease in the proportion of respondents using the Tamar Tag (at both crossings) while the use of contactless has increased (+6% Bridge / +9% Ferry).

## Price structure

- Just under two thirds of the total sample indicated that charges should be “increased uniformly” this rose to 67% among Tag users - suggesting that respondents did not want variable pricing - even if it could be used to help manage traffic flows. The results were very similar to the 2022 survey.
- Just over ¼ indicated that users should be charged more for using the crossings during peak times.
- There was a continued shift in sentiment this year regarding charging more for the ferry. Support for charging more has gradually increased, from 42% in 2020 to 50% in 2022, to 56% of the total sample in this survey. 60% of Tag users wanted to charge more for using the ferry.
- 44% of respondents indicated that they wanted to keep the charges for both crossings the same - down by 6% from the 2022 survey.
- Just over half (53%) of the total sample indicated that the current pricing ratio should be maintained, this has increased by 9%, from 44% in 2022.

# Summary 3

- There was almost a 50/50 split by Tag users – with 48% indicating that the current pricing ratio should be kept, and 50% indicating the difference should be increased.
- Around two fifths (42%) of the total sample want the pricing ration between bigger vehicles and cars to be increased but this decreased by 14% compared to 56% in 2022.
- In 2020, the majority of respondents (82%) indicated they wanted to keep the existing 50% discount for pre-payment using the Tamar Tag. This decreased to 47% in 2022 and is now 42%.
- 44% would like to increase the percentage discount for Tamar Tag account holders (total sample and Tag users), up 4% from 2022.
- 47% of Tag users would like to keep the existing 50% discount.
- Those that want the percentage discount reduced has remained unchanged at 14% for the total sample but was 10% for Tag users.
- 75% of all respondents indicated that crossing charges should be independent of vehicle emissions. This is just slightly less than in 2022 (72%)

## Most appropriate action to resolve the financial shortfall

- Over half (57%) of the respondents indicated that no change in tolls should take place. This position was also supported by some of the verbatim comments made.
- This percentage dropped to 42% among Tag users.
- However 43% indicated that they would consider a different toll structure to help resolve the financial shortfall. This rose to 58% of Tag users.

# Summary 4

- Around a fifth felt that increasing the bridge tolls (tag and cash) and increasing ferry crossing tolls (tag and cash) by a higher amount would be the most appropriate choice. This rose to 28% of Tag users
- This was also reflected in the 56% of respondents who also indicated that more should be charged for the ferry crossing to reflect its higher operating cost.

## Future travel and reasons for change

- The majority (80%) of all respondents indicated that they did not think their travel patterns would change in the near future. This rose to 85% among Tag users.
- Of the 20% of respondents who indicated that they thought their travel patterns would change, well over half indicated this would be using the crossings less frequently.
- Among 15% of Tag users who also indicated they would travel differently, 71% indicated they would travel less frequently. A similar number (18%) of both the total sample and Tag users indicated they would travel more frequently.
- 11% said they would travel at a different time of the day (up from 7%). The number of those using public transport would increase on balance by 6% and 9% for Tag users.
- 6% of the total sample and 10% of Tag users indicated that they would walk and cycle more (up from 4% from 2022)
- When looking at this change in travel behaviour “other reasons” accounted for a significant number of responses (41%) and the majority of these were linked to a reduction of usage because of the perceived increases in toll costs in the future.

# Summary 5

- The cost of living crisis and social hardship were repeatedly mentioned in the verbatims indicating that any cost increase would have a knock on effect and reduce future usage.
- There was also a post Covid reduction in the number of respondents who indicated that more home working (11%) was likely to cause a change in their travel behaviour (down from 38% in 2022) For Tag users this was 14%.
- Those citing unemployment or being retired increased from 4% to 15% (closer to 2020 -11%)
- Being less inclined to socialise was also a diminishing reason at 11% compared to 20% in 2022. Other areas were very similar to the 2022 survey.
- Those indicating that they would use the crossings more frequently (18%) included the following reasons – a change in school / new job/ caring for family/ developing business / more time now spent in the office in Plymouth.

# Summary 6

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

- There were a total of 3,742 responses with comments. This equated to 52% of the total sample making a comment.
- Each respondent often made a number of points in their response. Many of the comments made did not relate to the question asked and focused on the perceived social injustice and hardship they felt an increase in the toll would deliver.
- The responses were categorised (15 sub groups) under appropriate headings to provide more clarity in the dataset and help summarise the overall attitudes towards the charging structure and service in general.
- The top four topic categories which attracted the most comments were unchanged from the 2022 survey. These were - abolishing the toll altogether, pursuing central government to support the costs, lowering the charges for locals and having no price increase / decrease in the price of the toll.
- However the overall sentiment had shifted from comments on no price increase / decrease price, towards abolishing the toll altogether (+8%) and pursuing central government to support the costs (+2%)
- Comments around using automated booths (+3%) also saw an increase, largely based on the frustration with queues and associated traffic congestion caused by the toll booth operation.

# Summary 7

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

The categories are shown below in descending order of frequency.

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



# Further information regarding this survey – or next steps ?

If you'd like any further information regarding this survey or are considering further supporting qualitative or quantitative research we would be happy to discuss this with you.

Key contact regarding this report and further work :



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