

Complimentary Copy

Survey of European Cities
and Local Authorities
on
**CONGESTION
CHARGING**

Analysis – March 2003

**Deloitte
Consulting**

About the survey

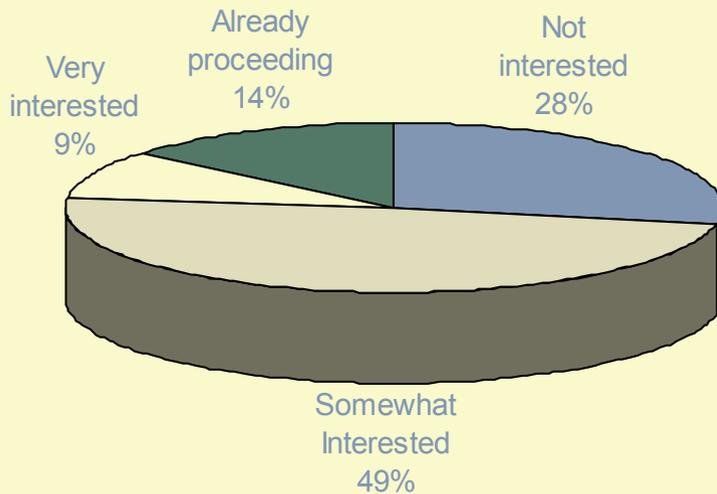
- Survey scope
 - European cities and local authorities across 15 different countries
- Survey participation
 - 73 cities / local municipalities approached between February 24 and March 12, 2003
 - 47 responses received (64% response rate), representing over 30 million citizens
- Survey methodology
 - Survey was designed to be high-level and brief (10-15 minute response time) to maximise participation
 - Targeted prominent UK and continental European cities (mostly 400k plus inhabitants) excepting those who already have schemes in place
 - Also approached some smaller UK localities who had expressed interest in congestion charging in their local transport plans
 - Surveys were administered in a mix of languages either by phone or email
 - Respondents were assured of confidentiality for individual responses

Congestion charging is a hot topic amongst European cities

- 72% of the cities were either interested or had already proceeded with congestion charging schemes
- 26 out of 34 cities that were interested are planning to start operating congestion charging within the next decade and out of these 5 are planning to start operating within 3 years

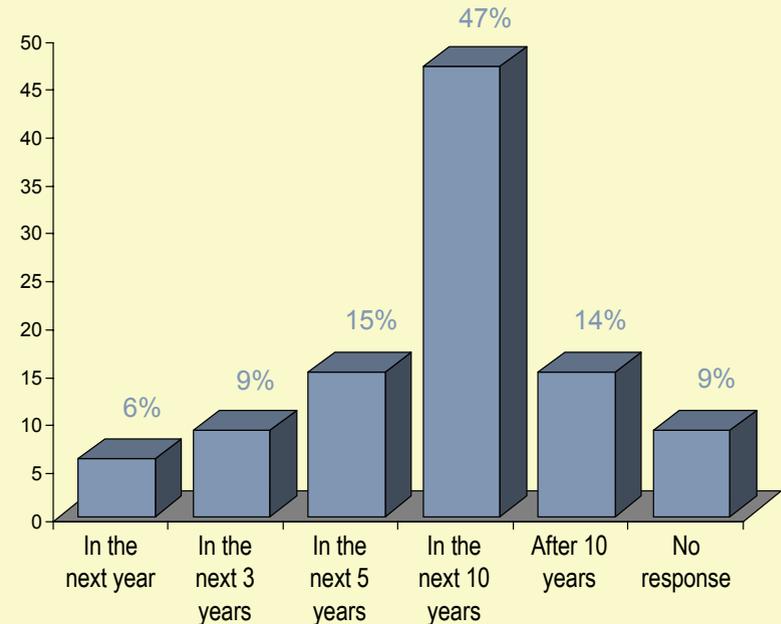
Question:

- Which of the following best describes your city or area's level of interest in adopting a congestion charging scheme?



Question:

- If you are either thinking about it or already proceeding with it, when would you foresee your city or area starting to operate congestion charging? [excluded respondents who answered "Not interested" in adopting a charging scheme]

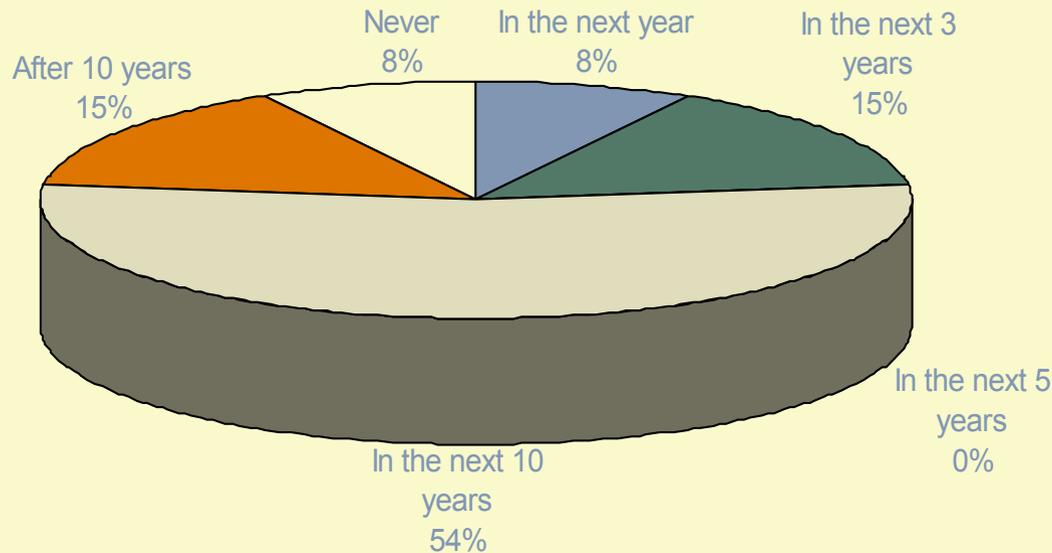


Even for those not currently interested, the majority foresee that congestion charging will be back on the agenda in the future

- 10 out of 13 cities that were not interested still foresee congestion charging will be back on the agenda within the next decade

Question:

- When do you think that congestion charging might come back on the agenda for your city or area?
[only asked of respondents who answered "Not interested" in adopting a charging scheme]

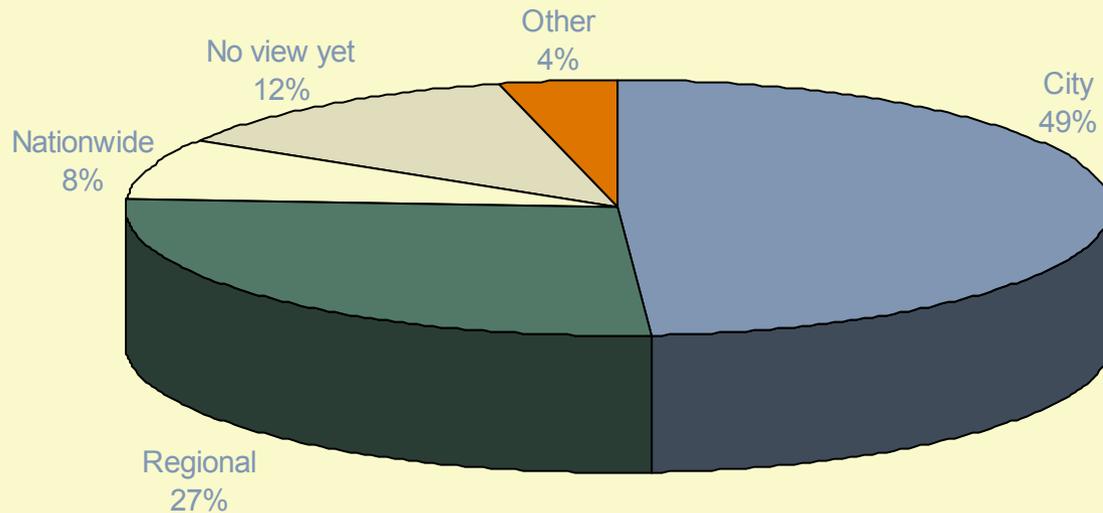


The majority of cities believe in approaching implementation initially on a local basis with wider scale as a future goal

- 49% believe that congestion charging will happen on a city basis
- Several cities comment that there is a need for regional and national co-operation and that these might be considered in the future

Question:

- *Were your city or area to introduce congestion charging, do you think it might happen on a city, regional or nationwide basis?*

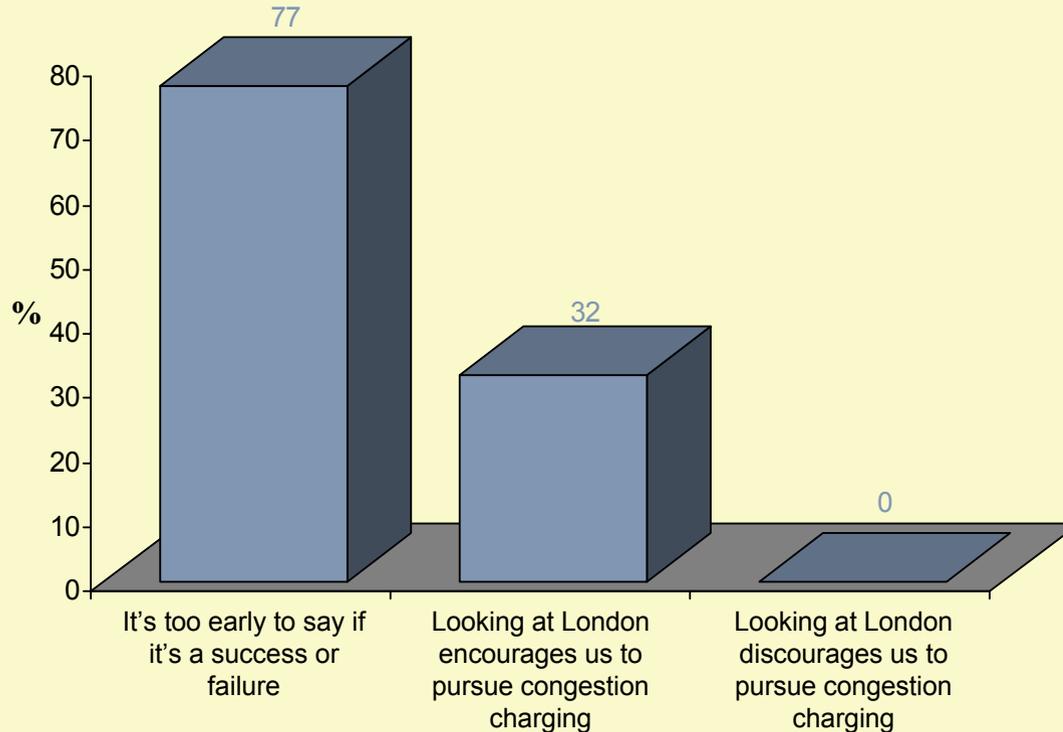


London's scheme has been followed closely throughout Europe and its success has contributed to the high level of interest

- Over 30% of the cities are encouraged to pursue congestion charging by the successful launch of the London scheme
- The majority of the 77% who believe it's too early to assess the longer term success of the London scheme nevertheless acknowledge that the initial implementation was successful

Question:

- Which of the following best describes your view of the recent introduction of congestion charging in London?



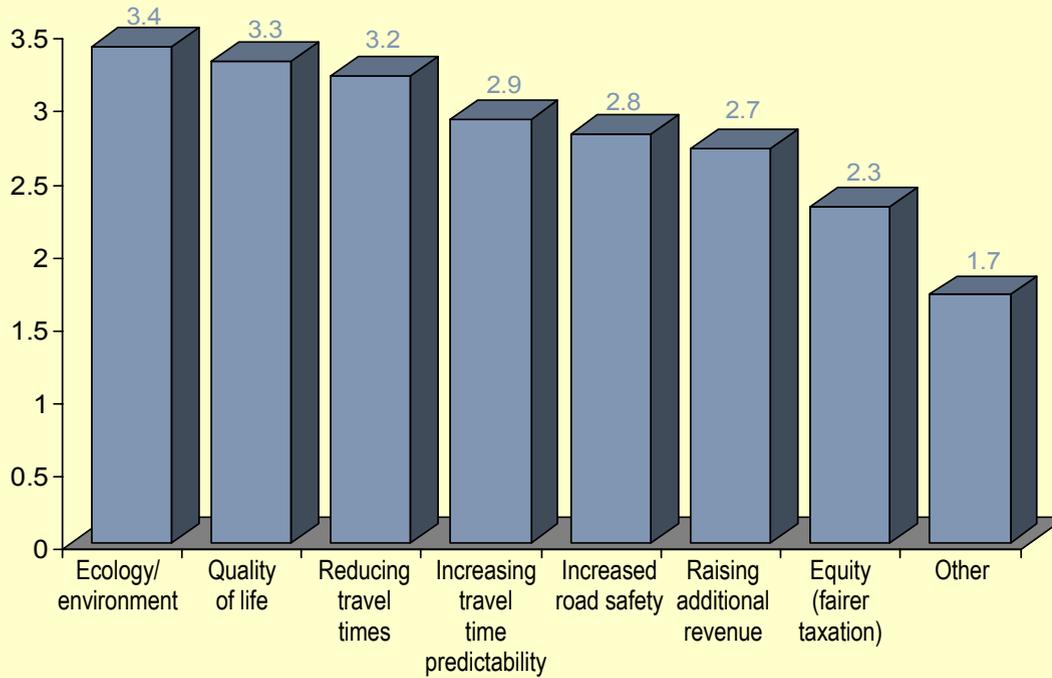
NB: Some respondents gave multiple answers, therefore total score is not 100%

The benefits from implementing congestion charging are primarily seen as environmental improvements and increased quality of life although increased revenue also features

- 9 cities also commented that improvements for public transport would be an important benefit

Question:

- *Were your city or area to introduce congestion charging, how important would the following potential benefits be? (1= less important, 5 = very important)*



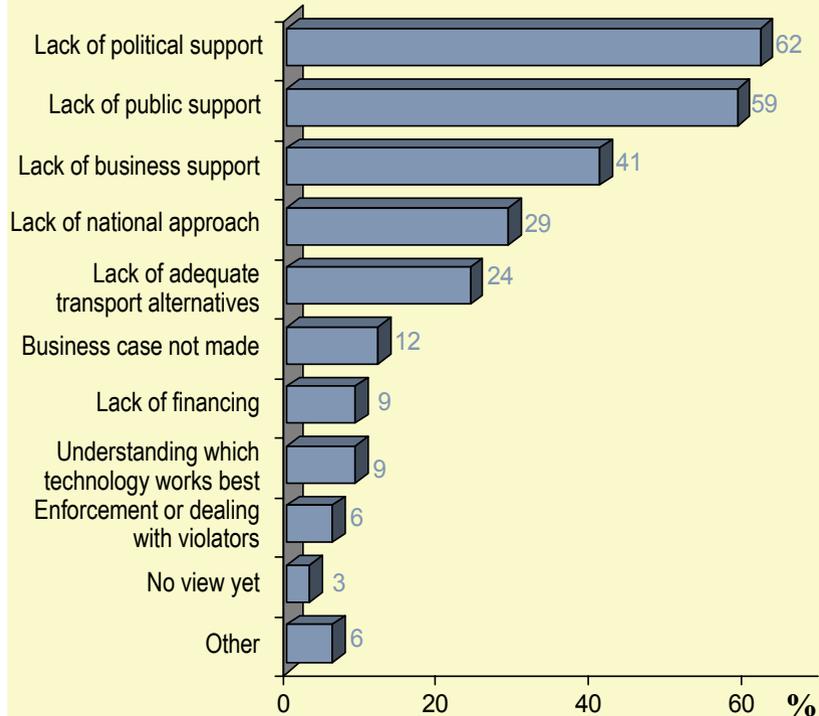
Not all respondents allocated a score to each option
The score is therefore based on total number of points divided by the total number of respondents

Gaining political support is recognised as being the most significant challenge

- Public support is seen to be the second key issue

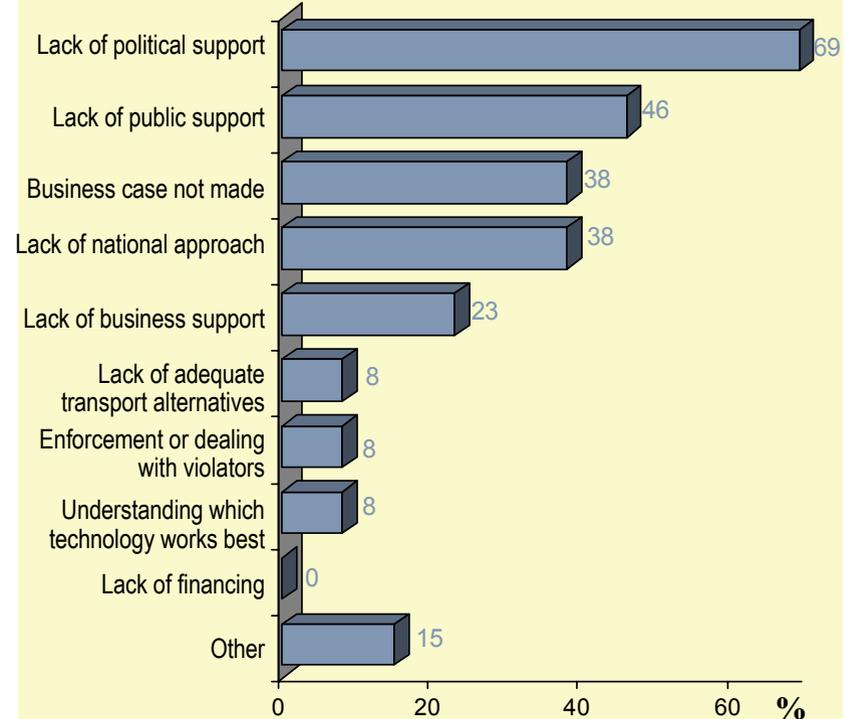
Question:

- What do you perceive as the three biggest challenges to implementing congestion charging? [excluded respondents who answered "Not interested" in adopting a charging scheme]



Question:

- Which of the following would you cite as the key reasons that your city or area is not interested at all in congestion charging? [only asked of respondents who answered "Not interested" in adopting a charging scheme]

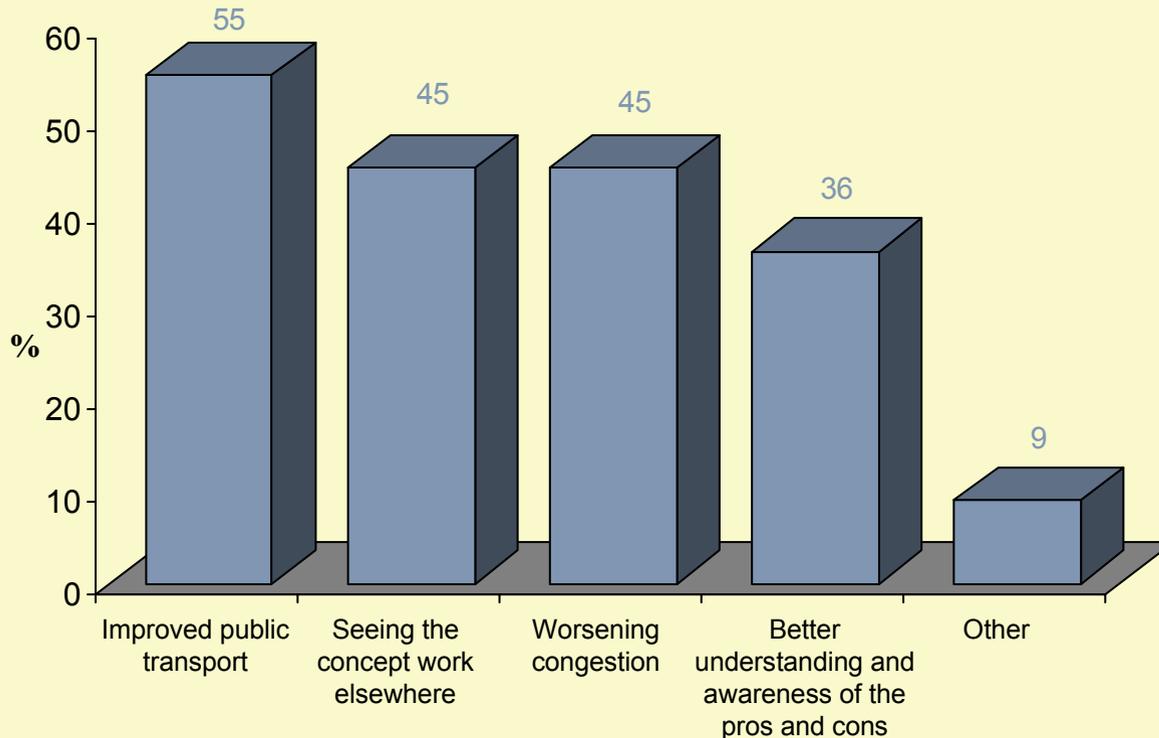


For those currently not interested the most widely recognised method to increase support is linking this with improved public transport

- Demonstration of successful schemes (such as London) coupled with worsening congestion are also believed to increase support for congestion charging

Question:

- *If lack of support from any group is a reason, which of the following do you think might increase support? [only asked of respondents who answered "Not interested" in adopting a charging scheme]*

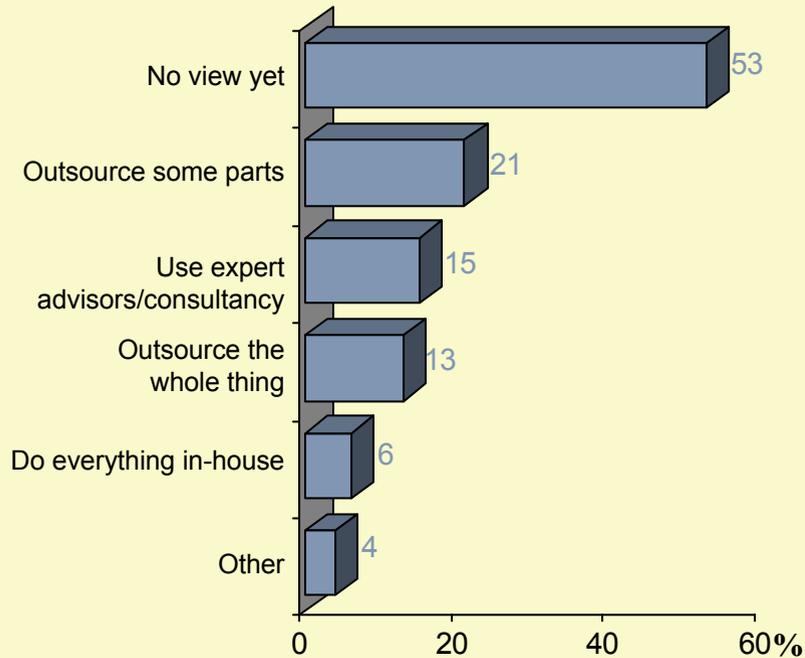


Cities need to determine how to operate the scheme: Few have decided this yet

- The operational model is still to be decided in most cities but very few envisage to do it themselves

Question:

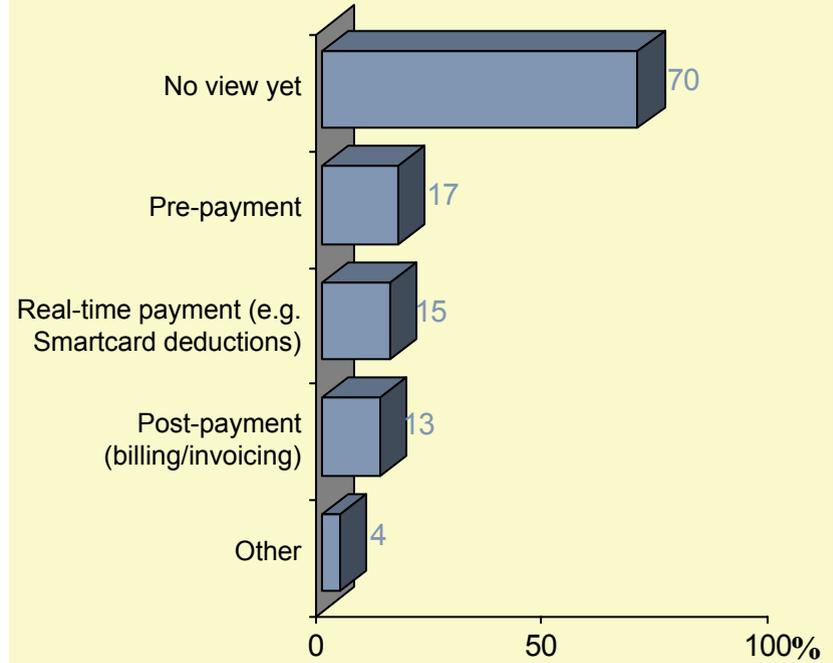
- *Were your city or area to introduce congestion charging, how do you think it might be operated?*



NB: Some respondents gave multiple answers, therefore total score is not 100%

Question:

- *Were your city or area to introduce congestion charging, which of the following payment plans might be offered?*



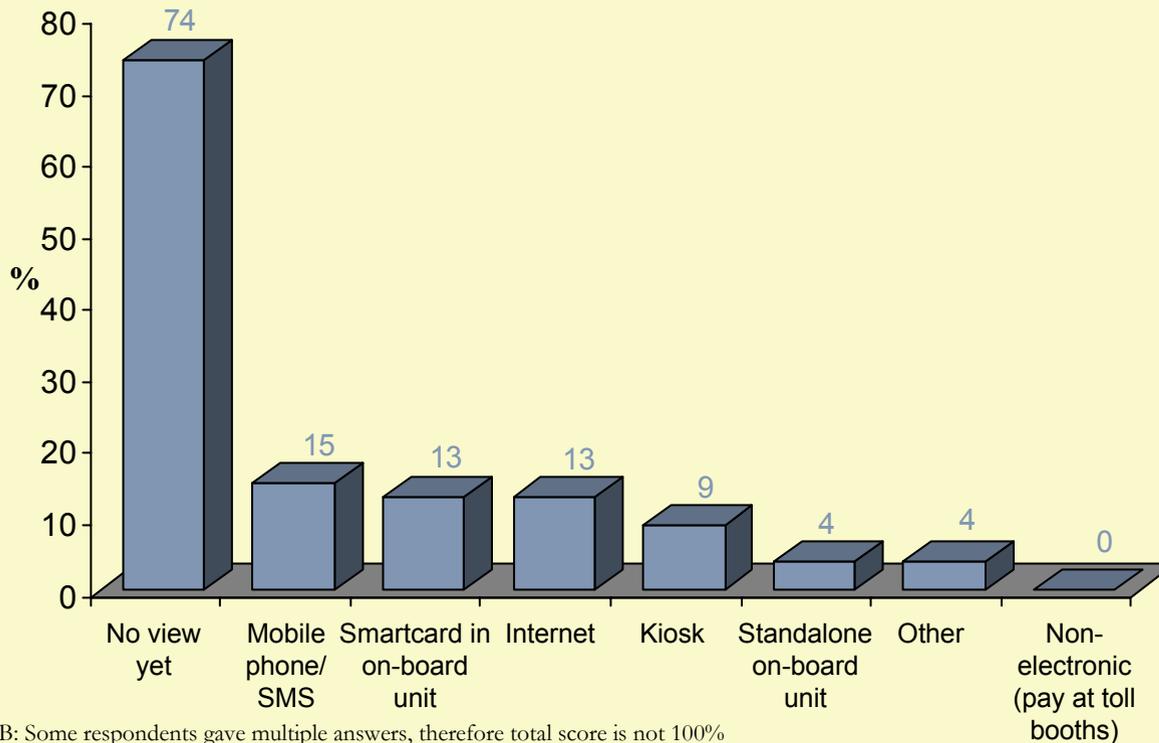
NB: Some respondents gave multiple answers, therefore total score is not 100%

Following decision on the operational solution, there are technical decisions to be made on payment methods . . .

- The majority of cities have no current view of the technical solutions they would deploy for payment

Question:

- *Were your city or area to pursue congestion charging, which type of payment technologies do you think might be employed?*



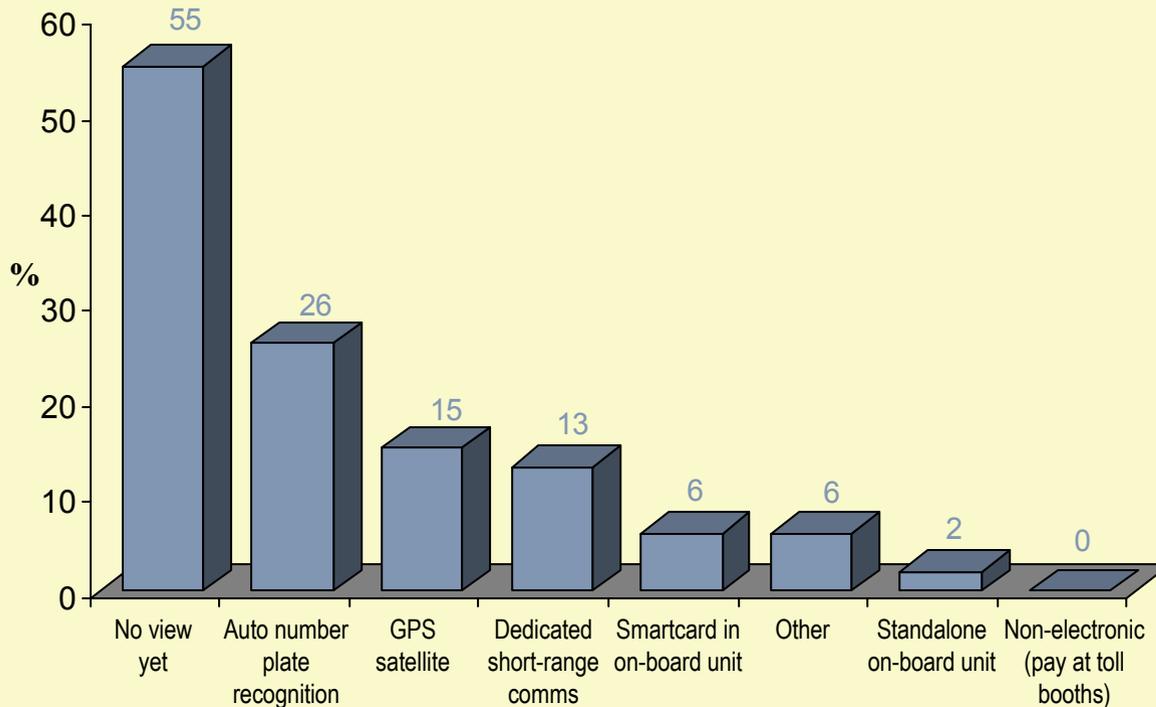
NB: Some respondents gave multiple answers, therefore total score is not 100%

... and detection technology tools

- The majority of cities have not selected the technical solutions they would deploy for detection

Question:

- *Were your city or area to introduce congestion charging, which of the following detection technologies do you think might be employed?*



NB: Respondents gave multiple answers, therefore total score is not 100%

Conclusions

The high response rate to this survey, with 47 participants across 15 countries, provides a good picture of the emerging state of congestion charging across Europe. Some of the key messages are:

- congestion charging is widely recognised to be a hot topic
- lack of political support is seen as the most significant challenge
- the majority of cities / local municipalities have not yet decided on their preferred operational and technical solutions
- the implementation of London's scheme is seen as a success and is an encouragement for others to go ahead with similar schemes

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