

Awareness of Road Closures
During the Road Events

11209

June 2012

Methodology

Telephone and face-to-face surveys were conducted amongst residents in Kingston and Richmond. Business decision makers in these areas were also contacted by telephone

- The questionnaire was agreed with TfL in advance and tailored for each group of respondents – residents (telephone & F2F) and businesses (telephone)
- Sample for the telephone surveys was sourced from our specialist suppliers Experian (business) and UK Changes (residents)
- A total of 624 Londoners were surveyed – 322 by telephone and 302 face-to-face
 - A screening process was used to ensure that all respondents lived within one of 10 postcode sectors that will be affected by road closures during the London 2012 cycling events
 - Within the analysis a simple weight on age and gender has been applied to the data from the telephone interviewing
- 100 telephone interviews were conducted with senior decision makers within businesses in the Kingston and Richmond areas

What the results say

Residents and local businesses are generally aware of the upcoming road events and subsequent road closures, but are less sure about the specific routes and days that will be affected

- Most residents and businesses are aware that cycle road races will pass through South West London
- Awareness of the Cycle Road Race event and its route is higher than for the Time Trials
- Only 20% of businesses and 13% of residents know that the races will take place on three days
- And only 7% of businesses and 5% of residents aware of the cycle races could name all three race dates
- The dates of the cycle road races have not filtered through to residents or businesses – any future communications nearer the time of the races may need to address this issue
- Around half remember receiving a leaflet about the cycle road races – residents' recall varies widely by postcode. Half of residents and businesses have kept the leaflet for future reference
- Businesses expect to make more changes to travel plans than residents – one in ten say they will close – though right now they are more likely to be planning action than having taken it

What the results say (cont.)

- Half of residents expect the cycle road races to have little or no impact on them. Businesses expect a wide range of challenges, including deliveries and getting clients and staff to and from sites
- The majority of businesses intend to take some form of action during the Events; in particular they will check online before making any journeys on cycle race days
- Similarly to the ORN research, most businesses do not feel fully prepared for changes to the road network during the Games – half give a rating of 0 – 6 out of 10 (0 = not at all prepared, 10 = fully prepared)
- London 2012 and TfL websites would be first ports of call for both residents and businesses looking for more information on the cycle races
- Awareness of getaheadofthegames.com is low, although slightly higher among businesses than residents

Awareness summary

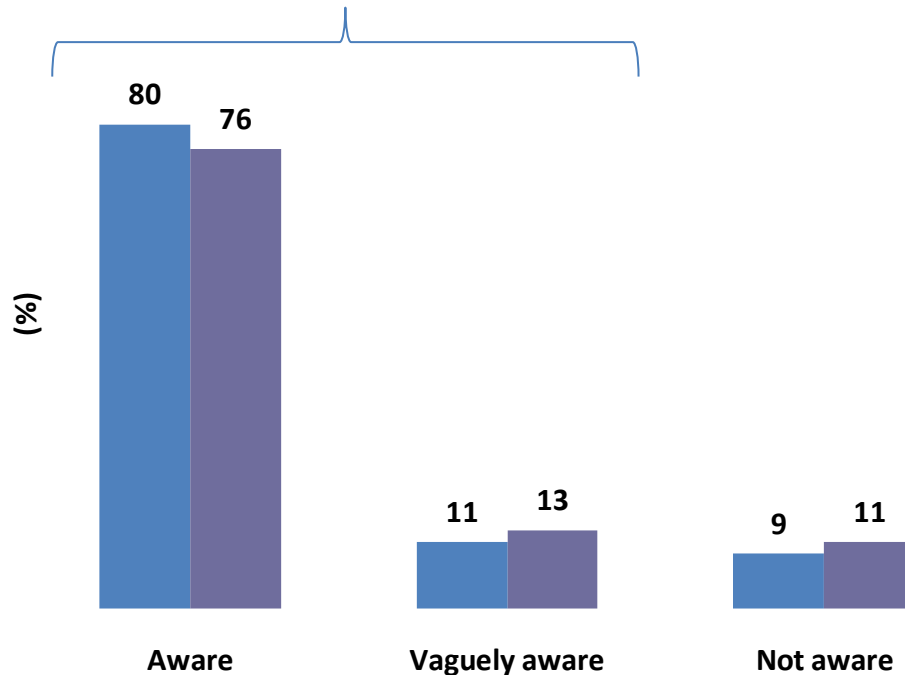
Top level awareness is high, but reduces around specifics

	Residents	Businesses
% aware of Road Events taking place in or through South West London	91%	90%
% aware of Olympic road event routes	Road Race 70% Time Trials 36%	Road Race 74% Time Trials 49%
% aware of any Olympic cycling events (net)	89%	90%
% aware of road closures	56%	62%
% aware of all three race dates	5%	7%

Awareness of road events in SW London

Majority of residents and businesses are aware that Olympic road events will take place in South West London

	Net aware
Residents	91%
Businesses	89%



■ Residents
■ Businesses

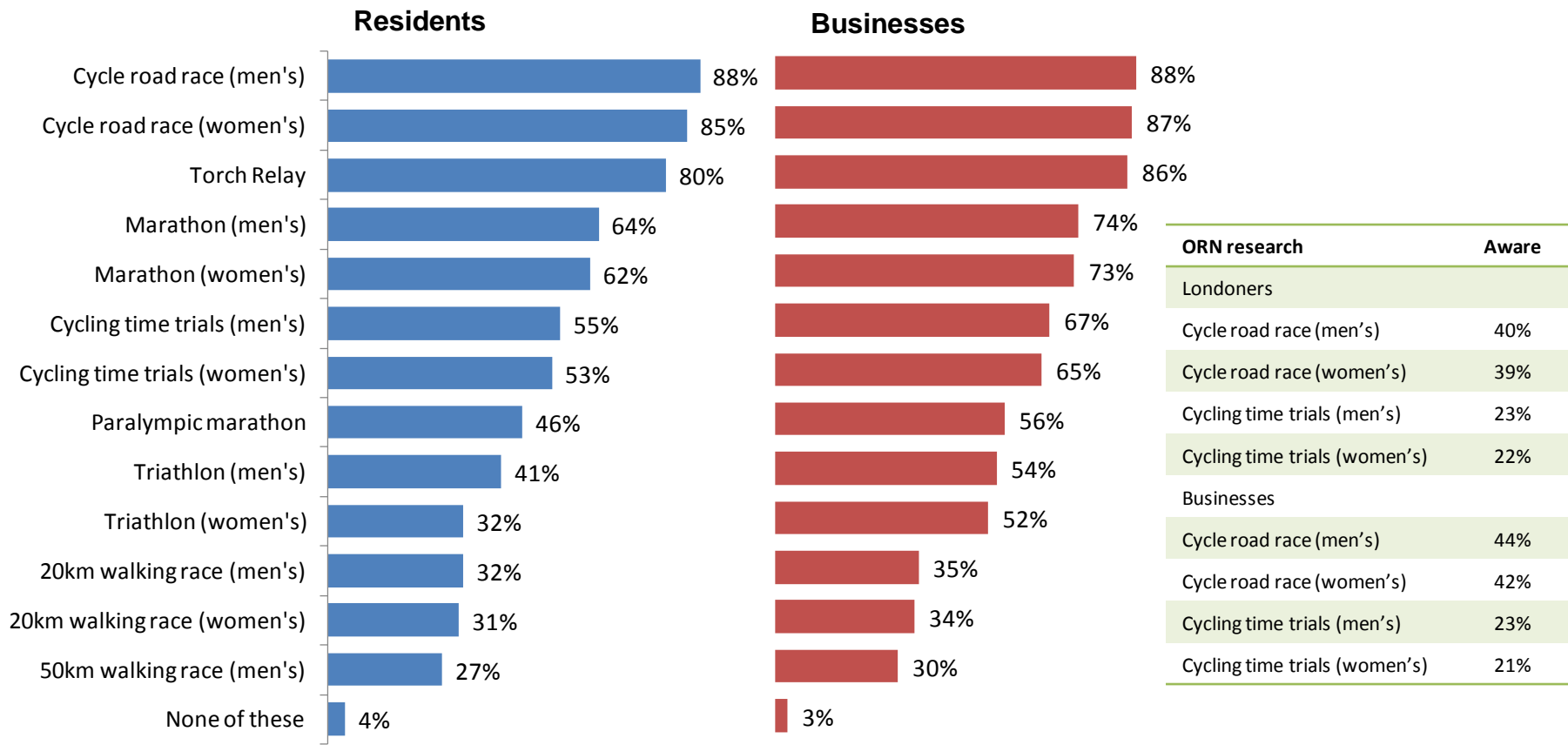
Resident net awareness	
Area of South West London	
Kingston	90%
Richmond	91%
Frequency of travel in South West London	
Weekly	92%
Monthly	93%
Less often	87%

J1. As well as events at Olympic venues, some events will take place on London's streets and public spaces. Were you aware that there would be Road Events taking place in or through South West London?
All (Residents 624, Businesses 100)

Awareness of Olympic road events

Similarly to the ORN research, awareness is highest for cycle road races, the Torch Relay and the marathon

At least half are aware of each of the cycle road events

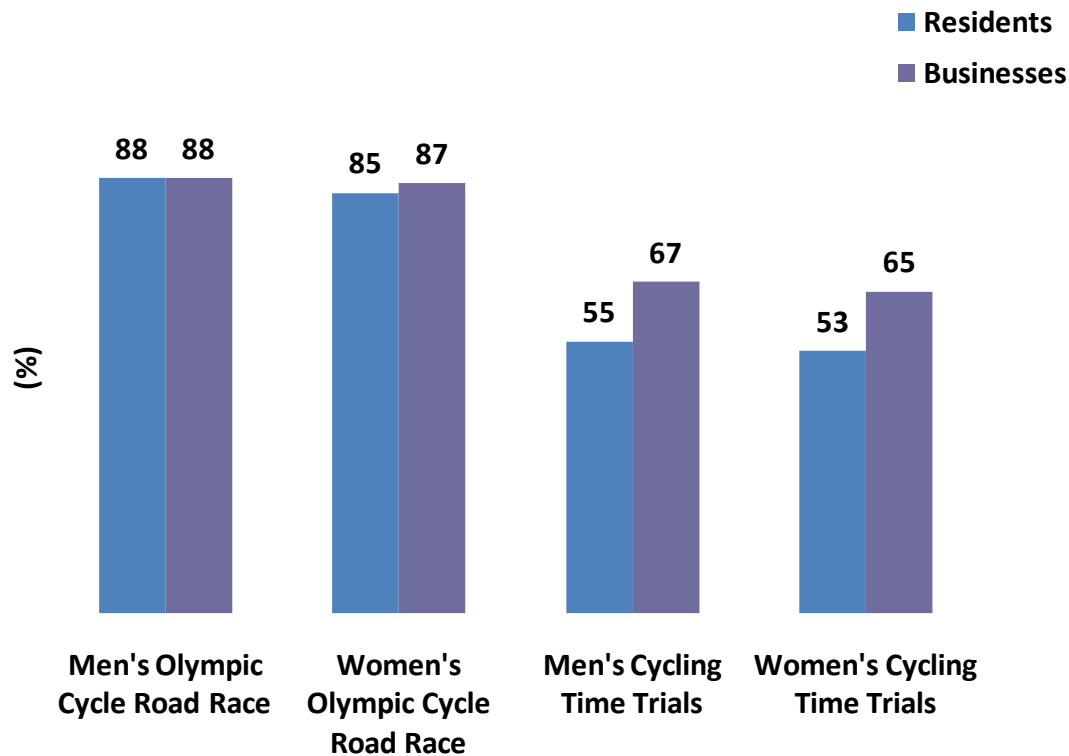


J2. Have you heard of any events which will be taking place on London's streets and public places as part of the Games?
 J3. I am going to read you a list of road events, please can you tell me which you have heard of?
 All (Residents 624, Businesses 100)

Awareness of Olympic cycling events

At least four in five are aware of the Olympic Cycle Road Races

Awareness of Cycling Time Trials is lower for both residents and businesses



Resident awareness of any cycle race	
Area of South West London	
Kingston	89%
Richmond	88%
Frequency of travel in South West London	
Weekly	90%
Monthly	94%
Less often	82%

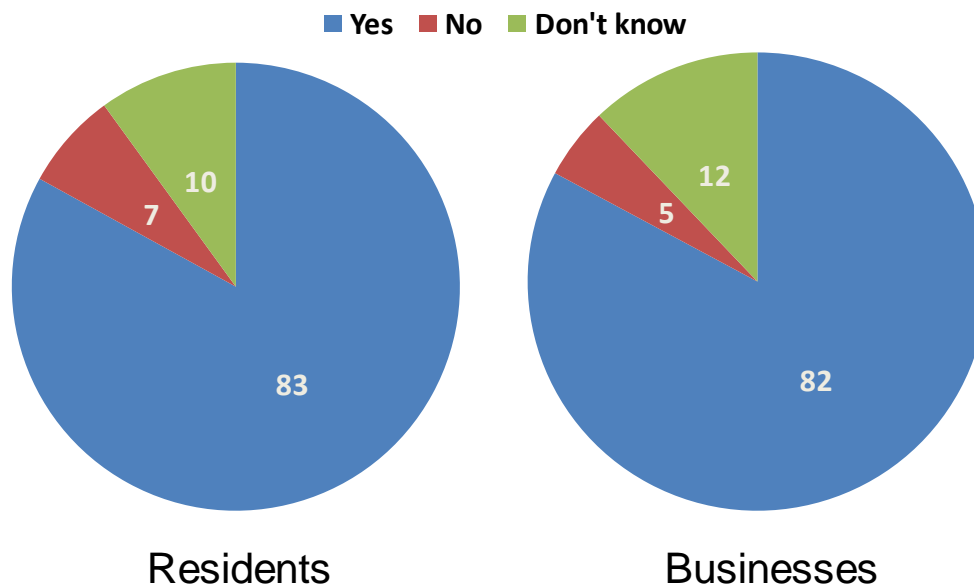
J2. Have you heard of any events which will be taking place on London's streets and public places as part of the Games?
 J3. I am going to read you a list of road events, please can you tell me which you have heard of?
 All (Residents 624, Businesses 100)

Awareness that races will pass close to home/business

Four in five of those that know of the cycle races are aware that they will pass close to where they live or work

Aware that cycle road races will pass close to where you live/work

Resident awareness	
Area of South West London	
Kingston	85%
Richmond	83%
Frequency of travel in South West London	
Weekly	87%
Monthly	81%
Less often	70%



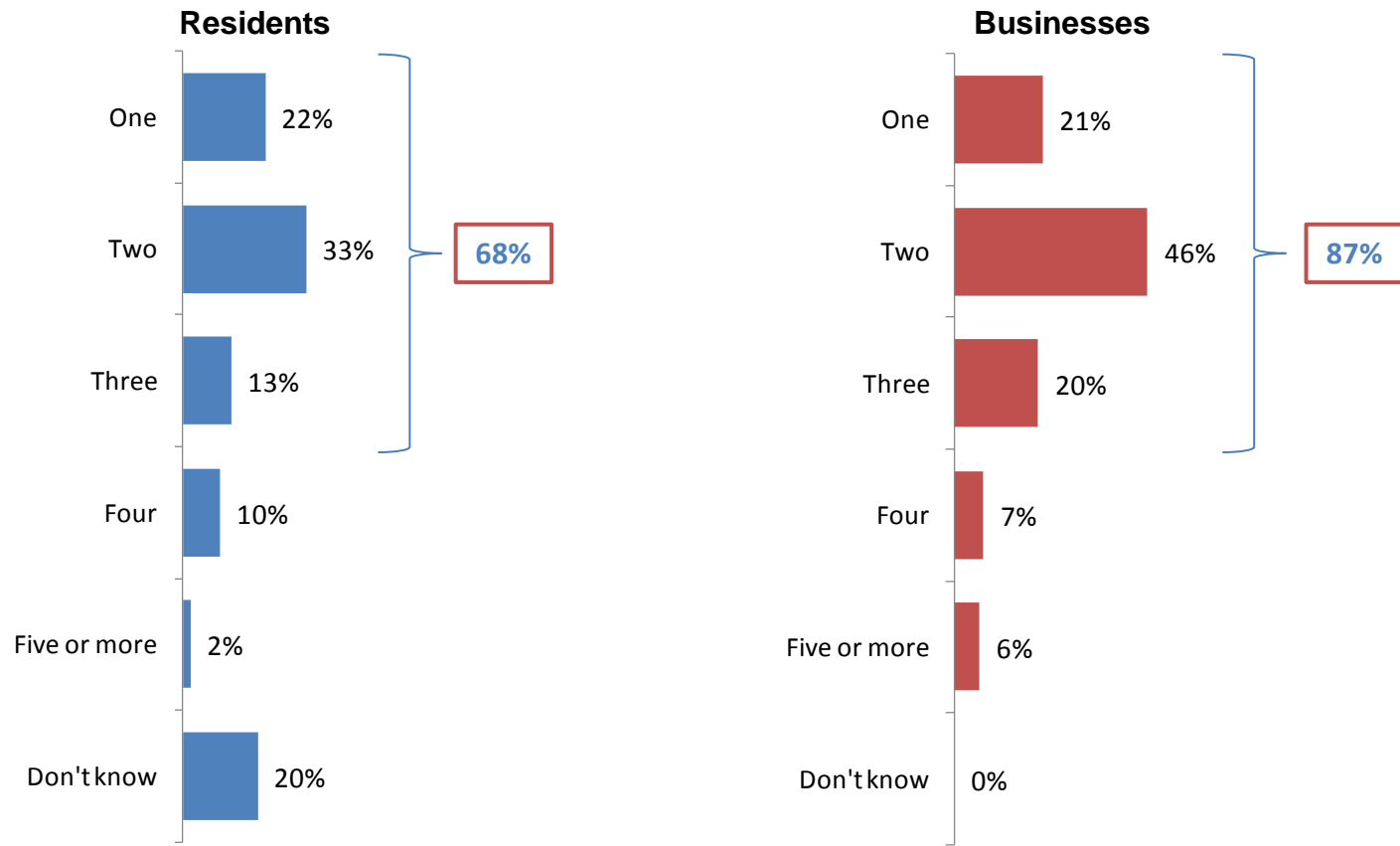
Residents' awareness by postcode (bases in brackets) Caution: low bases									
TW10 7 (69)	TW10 5 (10)	TW1 3 (33)	KT 2 5 (141)	TW1 2 (51)	TW11 9 (66)	KT 2 6 (63)	TW11 8 (68)	TW1 4 (37)	KT1 4 (22)
65%	75%	78%	81%	82%	88%	89%	91%	94%	95%

Z2. Will the cycle races pass close to where you live/your business?
All aware of cycle races (Residents 565, Businesses 92)

Number of days of road events

Only 13% of residents and 20% of businesses know that the events will affect 3 days. However, most do know that up to 3 days will be affected

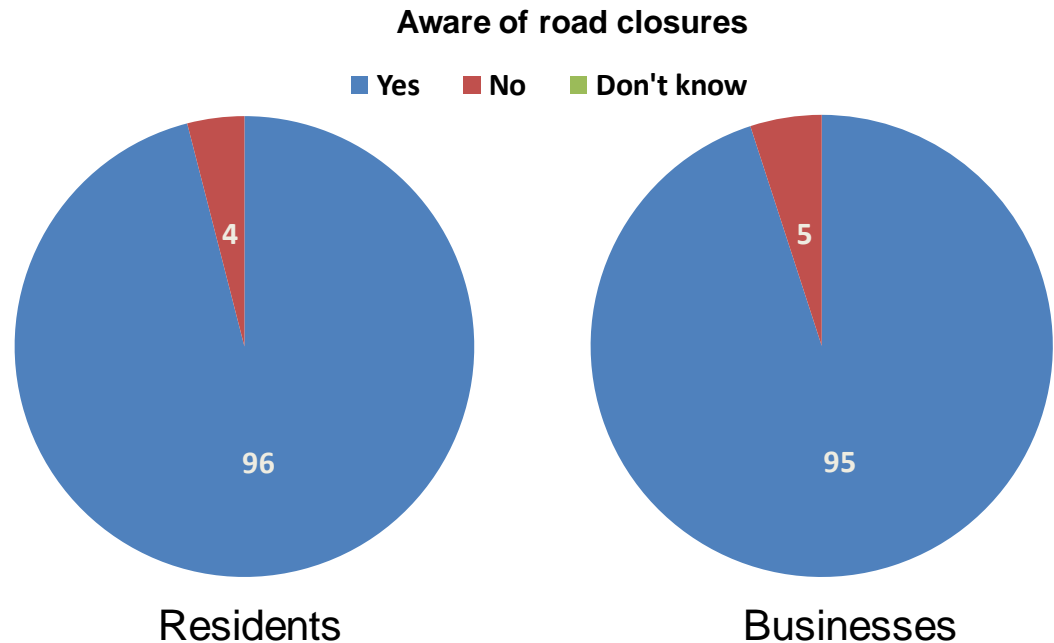
A fifth of residents are unsure on how many days the cycle races will pass close to their home



Awareness of road closures

Nearly all residents and businesses who know of the cycle races are aware there will be road closures in the local area

Resident awareness	
Area of South West London	
Kingston	94%
Richmond	97%
Frequency of travel in South West London	
Weekly	97%
Monthly	100%
Less often	90%



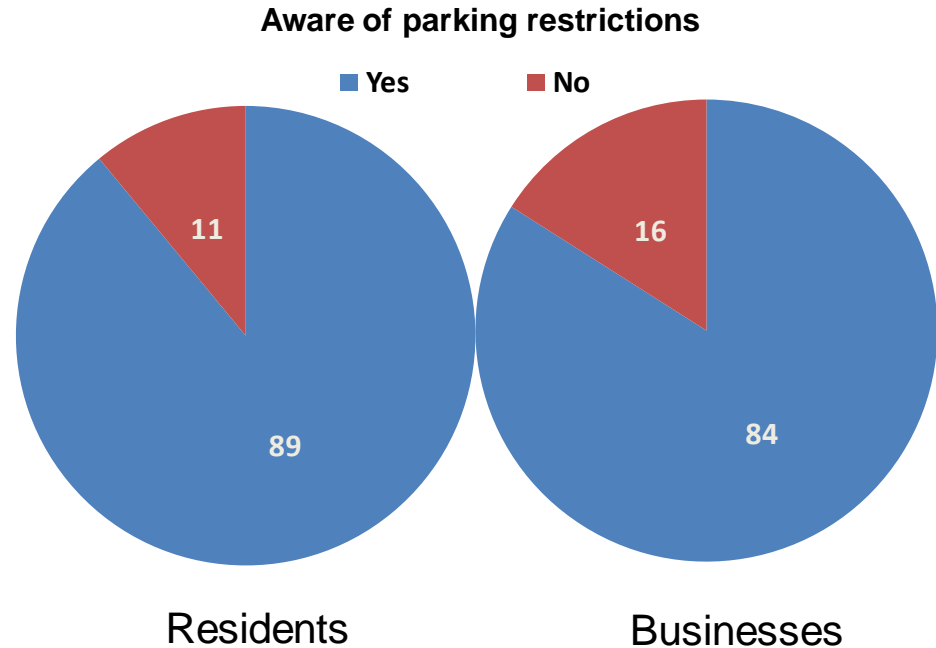
Residents' awareness by postcode (bases in brackets) Caution: low bases

TW1 3 (32)	KT2 5 (132)	TW11 8 (65)	TW10 5 (9)	TW10 7 (60)	KT2 6 (63)	TW11 9 (65)	TW1 4 (38)	KT1 4 (21)	TW1 2 (50)
90%	92%	94%	94%	96%	97%	99%	99%	100%	100%

Awareness of parking restrictions

At least four fifths that know of the cycle races are aware there will be parking restrictions on race days

Resident awareness	
Area of South West London	
Kingston	89%
Richmond	90%
Frequency of travel in South West London	
Weekly	91%
Monthly	97%
Less often	80%



Residents' awareness by postcode (bases in brackets) Caution: low bases									
KT1 4 (21)	TW1 3 (32)	TW10 7 (60)	TW11 9 (65)	KT2 6 (63)	KT2 5 (132)	TW1 2 (50)	TW1 4 (38)	TW11 8 (65)	TW10 5 (9)
79%	82%	86%	89%	90%	90%	93%	94%	94%	100%

Z6. And are you aware that you will not be able to park anywhere on the route on race days?
All aware of cycle races (Residents 540, Businesses 86)

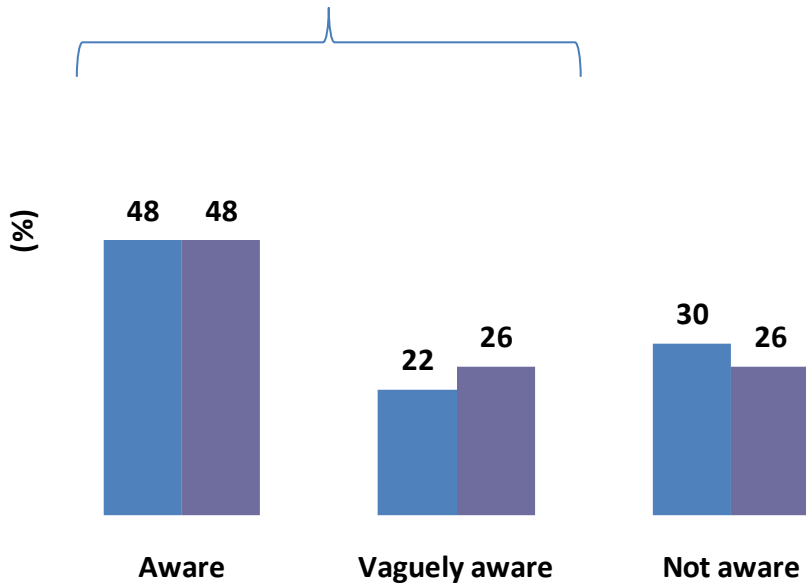
Olympic Cycle Road Race route

Awareness of the Cycle Road Race route is high

Three quarters are aware of the route

	Net aware
Residents	70%
Businesses	74%

Resident awareness	
Area of South West London	
Kingston	72%
Richmond	69%
Frequency of travel in South West London	
Weekly	76%
Monthly	71%
Less often	50%



- Residents
- Businesses

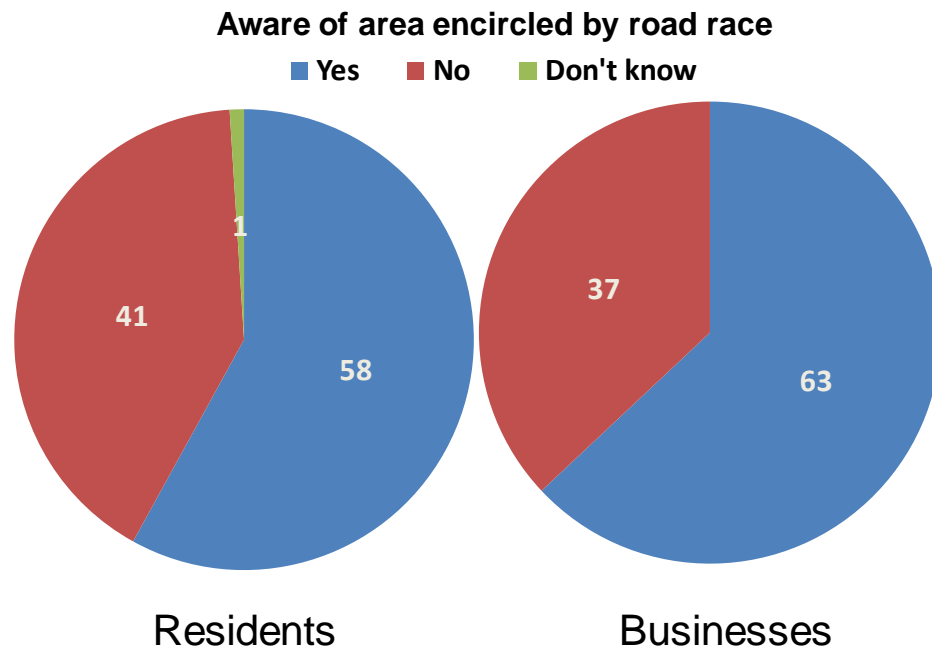
ORN research	Awareness
Londoners	20%
Businesses	20%

28/29. Before I gave you this explanation / showed you this map of the Olympic Cycle Road Race, were you aware this was the route it will take through your area?
All (Residents 624, Businesses 100)

Area encircled by Cycle Road Race

At least half of each audience is aware a portion of the local area will be encircled by the Olympic Cycle Road Race

Resident awareness	
Area of South West London	
Kingston	55%
Richmond	61%
Frequency of travel in South West London	
Weekly	63%
Monthly	71%
Less often	39%



Residents' awareness by postcode (bases in brackets) Caution: low bases

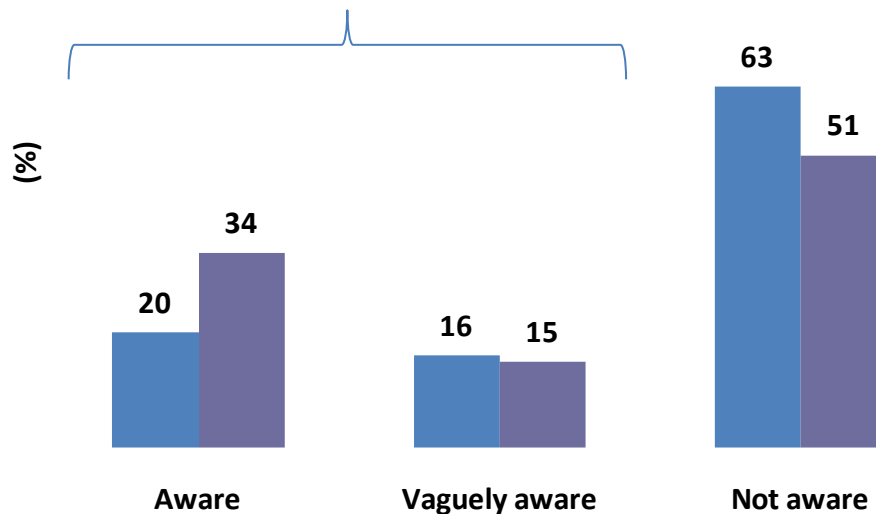
TW10 5 (11)	TW1 3 (37)	KT2 5 (157)	TW10 7 (82)	KT2 6 (73)	TW11 9 (73)	TW1 4 (39)	TW1 2 (52)	TW11 8 (73)	KT1 4 (22)
24%	49%	53%	54%	56%	64%	66%	66%	69%	70%

Olympic Cycling Time Trials route

Less awareness of the Time Trials route than the Road Races

Just a third of residents and half of businesses are aware of the Time Trials route

	Net aware
Residents	36%
Businesses	49%



Resident awareness	
Area of South West London	
Kingston	36%
Richmond	36%
Frequency of travel in South West London	
Weekly	40%
Monthly	31%
Less often	25%

■ Residents ■ Businesses

1
Don't know

ORN research	Awareness
Londoners	9%
Businesses	13%

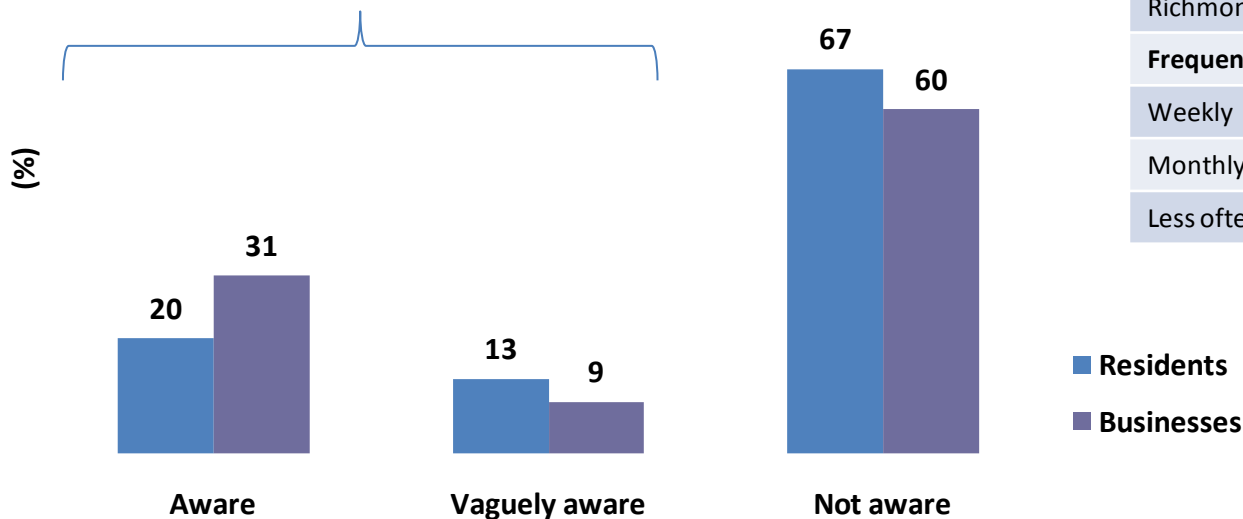
Z11/Z12. Before I gave you this explanation / showed you this map of the Olympic Cycling Time Trials, were you aware this was the route it will take through your area?
All (Residents 624, Businesses 100)

Area encircled by Time Trials route

Low awareness that a section of the local area will be encircled by the Time Trials route

Around two thirds of residents and businesses are unaware

	Net aware
Residents	33%
Businesses	40%

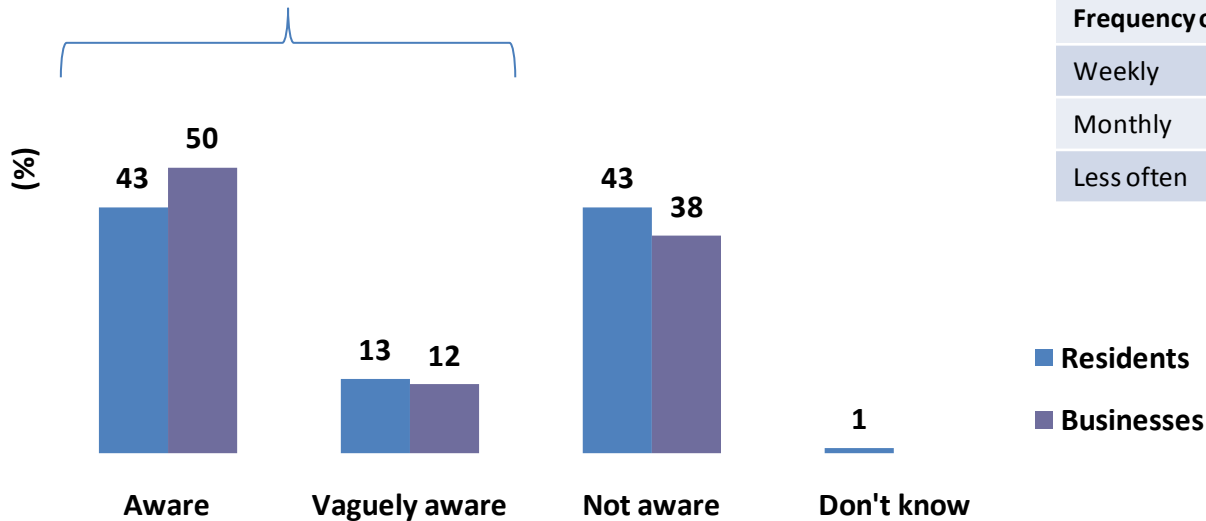


Resident awareness	
Area of South West London	
Kingston	31%
Richmond	34%
Frequency of travel in South West London	
Weekly	35%
Monthly	42%
Less often	23%

Awareness of difficulties moving around

Half of businesses and around three fifths of residents are not aware that there will be difficulty moving around

	Net aware
Residents	56%
Businesses	62%



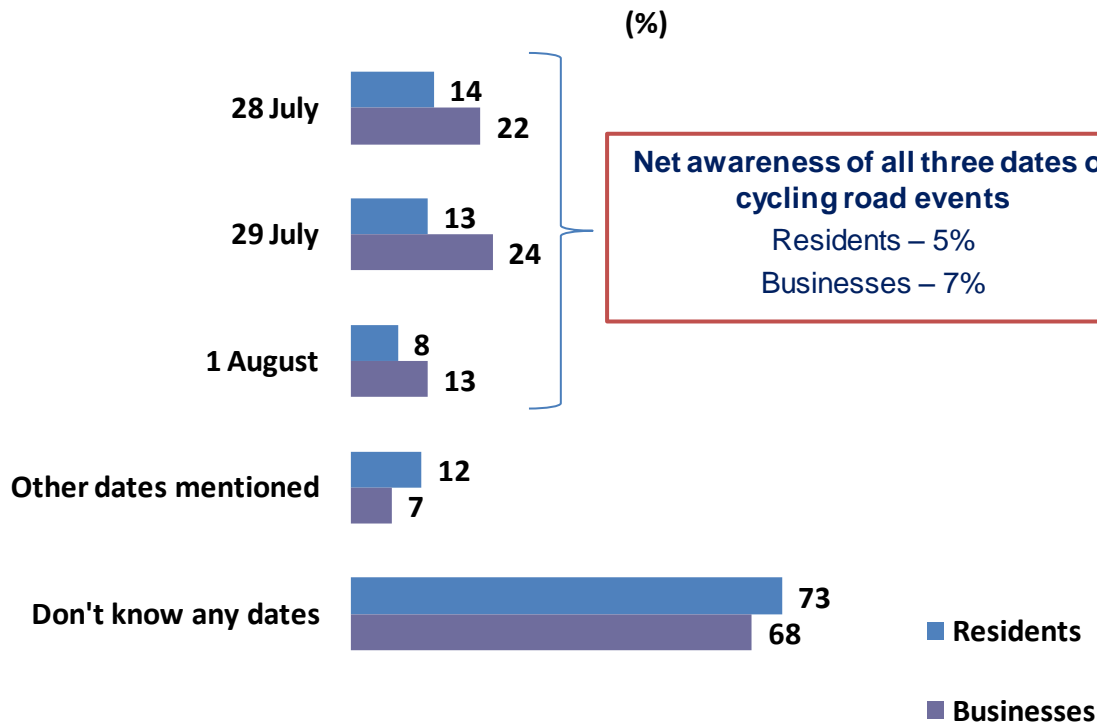
Resident awareness	
Area of South West London	
Kingston	56%
Richmond	55%
Frequency of travel in South West London	
Weekly	60%
Monthly	63%
Less often	39%

Z14. On race days, it will be very difficult to move in and out of these areas as roads will be closed to all traffic, including traffic crossing from one side to the other. Were you aware of this?
 All (Residents 624, Businesses 100)

Dates of cycling road events

Majority of respondents do not know any specific dates of Olympic cycling road events

Awareness is higher among businesses than residents



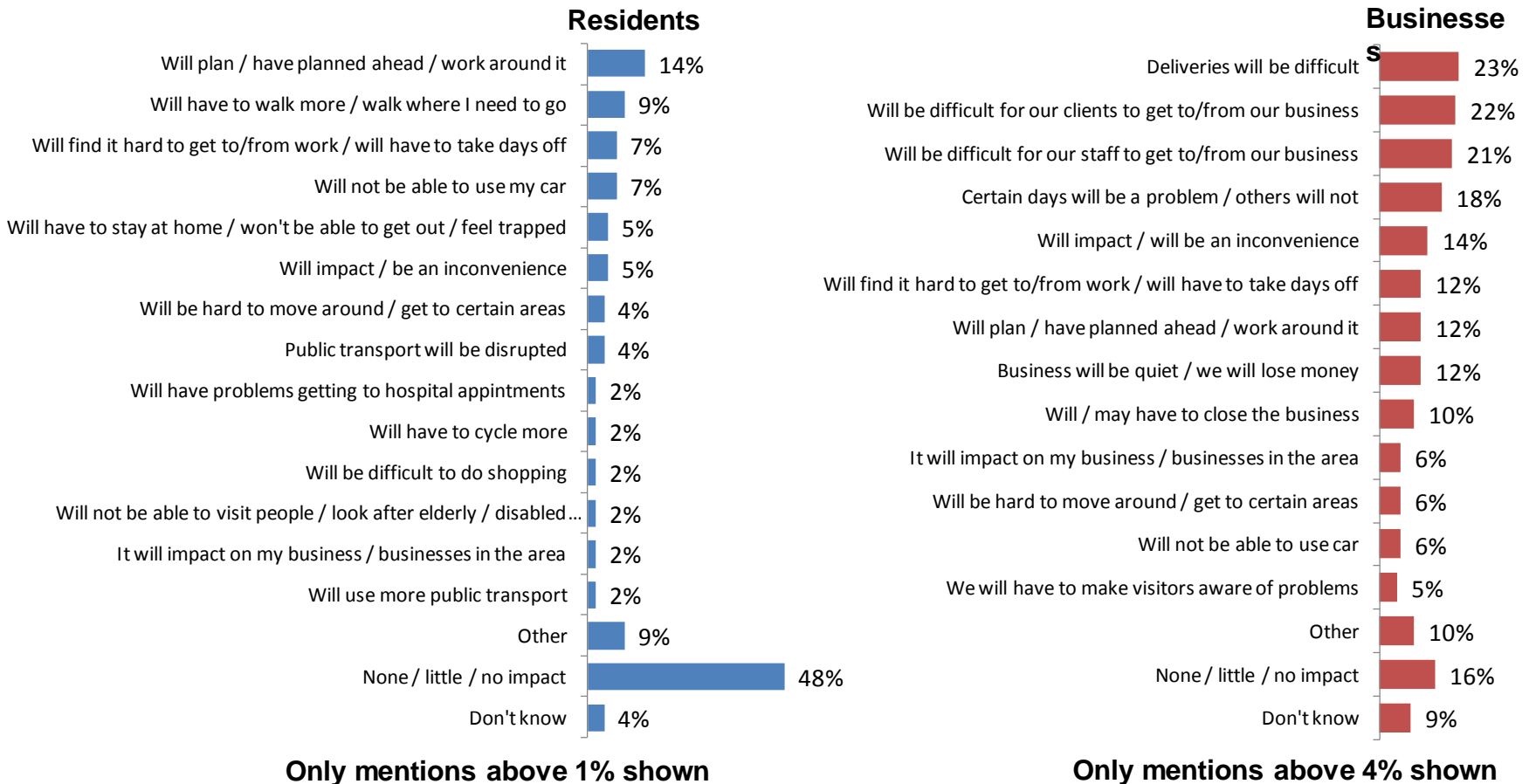
Resident net awareness of all three dates of cycling road events	
Area of South West London	
Kingston	4%
Richmond	6%
Frequency of travel in South West London	
Weekly	6%
Monthly	1%
Less often	1%

Z7. There will be three days when cycle races pass by your area; do you know the dates of these races?
All aware of cycle races (Residents 540, Businesses 86)

Perceived impact of cycle road events

Businesses are much more likely to be expecting an impact

Half of residents do not expect to be affected by the cycle road races



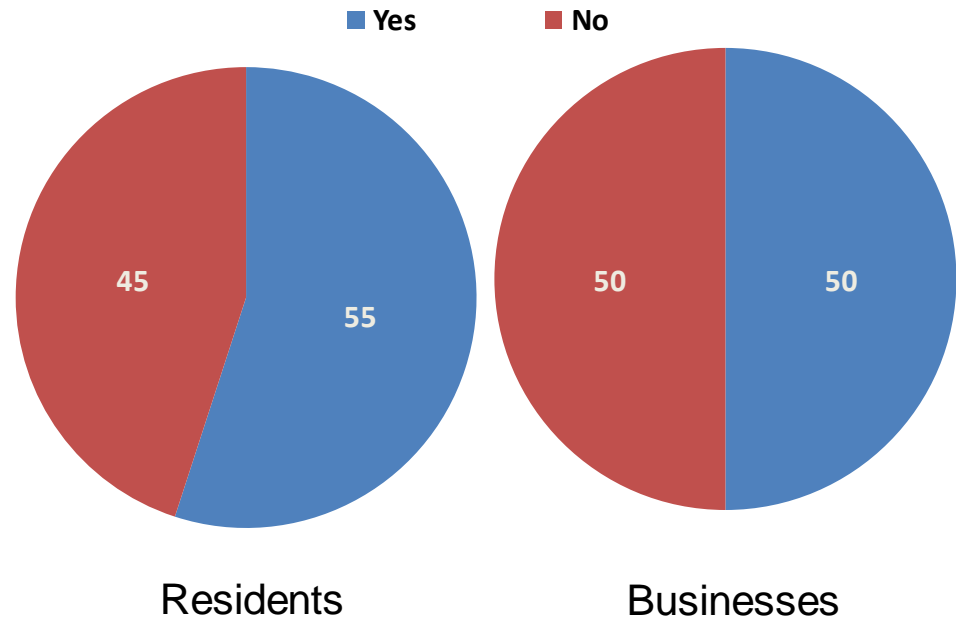
Z15. What impact will this have on you/your business?
All (Residents 624, Businesses 100)

Awareness of advertising

Half have seen some form of advertising or communications about the cycle road races

Aware of cycle road races advertising before research

Resident awareness	
Area of South West London	
Kingston	55%
Richmond	55%
Frequency of travel in South West London	
Weekly	58%
Monthly	55%
Less often	42%

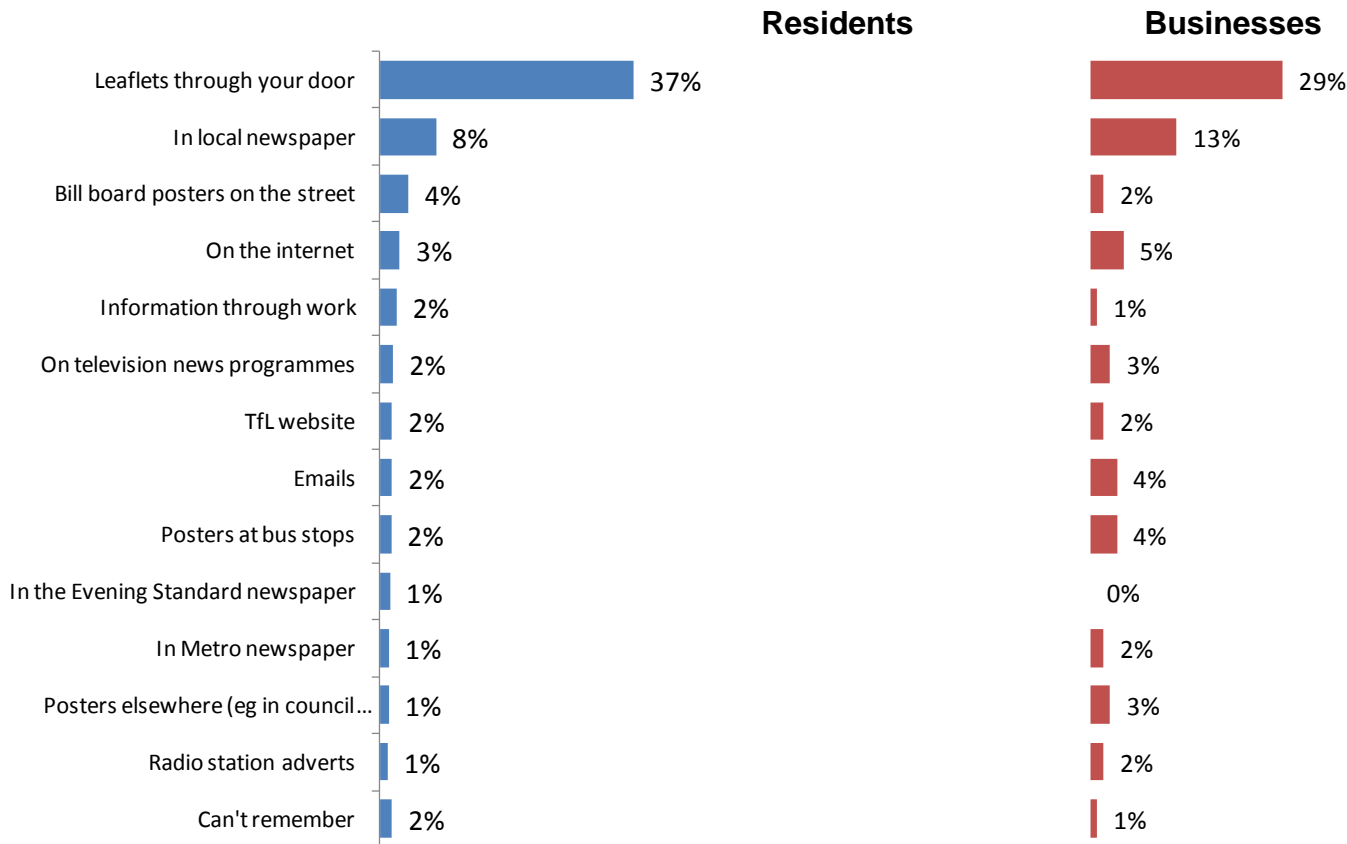


F2. Have you seen any advertising or other communications about these cycle road races?
All (Residents 624, Businesses 100)

Communications seen

Leaflets through the door are the most commonly recalled form of marketing about the cycle road races

Advertising in local press also key to getting message across



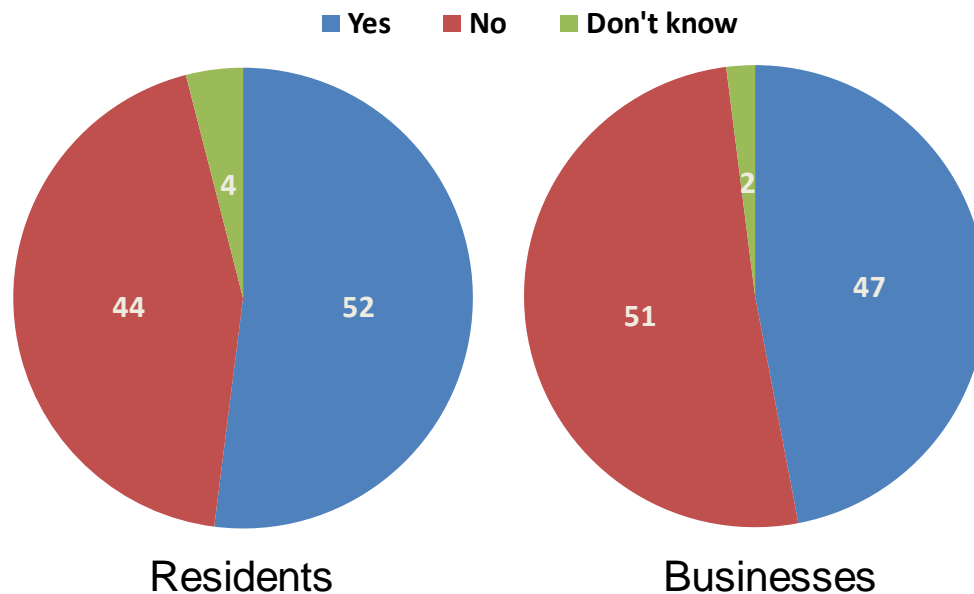
F3. Where have you seen adverts or messages about the cycle road race?
All (Residents 624, Businesses 100)
QUESTION UNPROMPTED ASKED OF THOSE AWARE OF ANY COMMS REBASED TO ALL

Leaflet from TfL

Around half recall receiving a leaflet about the cycle road events

Residents' recall of leaflet varies largely by postcode sector

Resident survey	
Area of South West London	
Kingston	49%
Richmond	53%
Frequency of travel in South West London	
Weekly	55%
Monthly	66%
Less often	38%



Residents' recall by postcode (bases in brackets)									
TW1 3 (37)	TW10 7 (82)	KT2 5 (157)	TW10 5 (11)	TW1 2 (52)	KT1 4 (22)	TW11 9 (73)	KT2 6 (73)	TW11 8 (73)	TW1 4 (39)
32%	36%	43%	51%	52%	54%	55%	61%	69%	82%

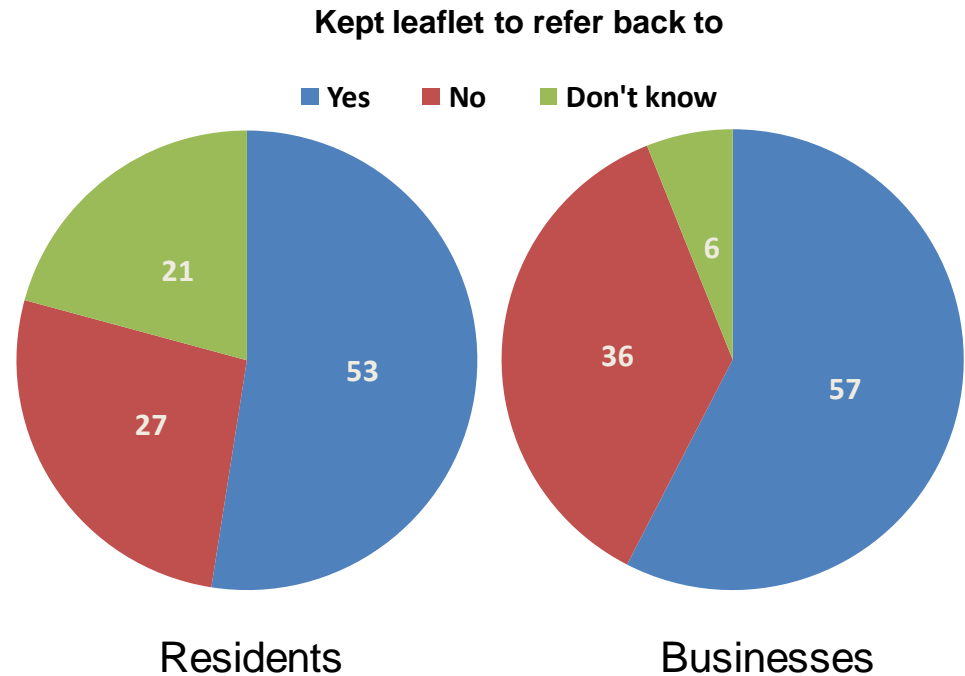
F3. Where have you seen adverts or messages about the cycle road races?
 F4. Have you received a leaflet through your door explaining how travel in your borough will be affected during the Games?
 F5/F6. Do you remember receiving this leaflet?
 All (Residents 624, Businesses 100)

Keeping leaflet to refer back to

Of those who received a leaflet through the door, half have kept it for future reference

Businesses slightly more likely to have kept the leaflet

Resident survey	
Area of South West London	
Kingston	57%
Richmond	51%
Frequency of travel in South West London	
Weekly	52%
Monthly	46%
Less often	59%



getaheadofthegames.com

Majority are unaware of Get Ahead of the Games website

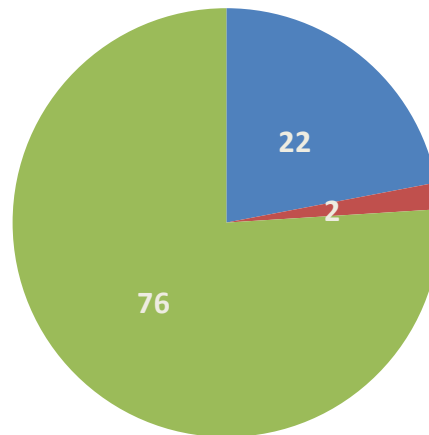
Of those who have heard of the site, only a small proportion have visited

Significantly more residents in Kingston have heard of the site than in Richmond

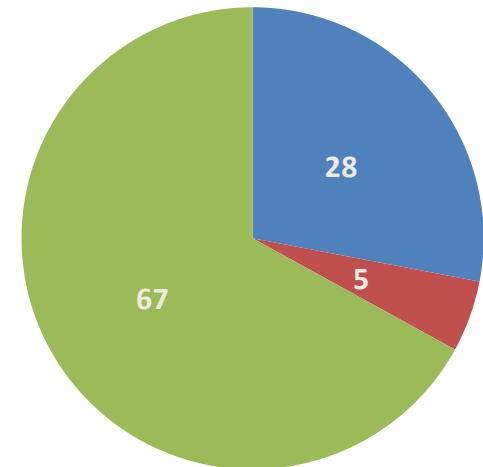
Aware of getaheadofthegames.com

■ Yes - not visited ■ Yes - visited ■ No

Resident awareness	
Area of South West London	
Kingston	30%
Richmond	20%
Frequency of travel in South West London	
Weekly	23%
Monthly	26%
Less often	25%



Residents



Businesses

F9. Have you heard of getaheadofthegames.com?
All (Residents 624, Businesses 100)

Expected travel changes

Businesses expect to make more changes to their travel plans than residents

One in ten businesses say they will close on race days to avoid disruption and 8% of residents say they will leave London on the affected days

	Residents	Businesses
I expect that I will need to change my travel plans A GREAT DEAL during the cycle races	20%	28%
I expect that I will need to change my travel plans A MODERATE AMOUNT during the cycle races	16%	17%
I expect that I will need to change my travel plans A LITTLE during the cycle races	22%	27%
I DON'T expect I will need to change my travel plans at all during the cycle races	15%	7%
I would not make any journeys on these days anyway	15%	5%
I will leave London on these days	8%	-
We will close on race days	-	10%
Don't know	4%	6%

Action taken

At least two in five businesses have already done or plan to do each of the actions asked about

Businesses are more likely at this stage to be planning action than having taken it

	A staff travel audit to identify the impact of the Games on how your staff will get to work	Taken action to minimise disruption to deliveries to your business	Taken action to minimise disruption to deliveries your business will make	Taken action to minimise any other expected disruption to your business
We have done this	14%	12%	7%	13%
We plan to do this	29%	36%	35%	48%
We have no plans to do this	32%	16%	17%	24%
This does not apply to our business	25%	36%	41%	15%

61% of businesses say they have taken action already

I sent out an email to make colleagues aware of the roads that are affected

I have to change delivery days

By reducing as much of the traffic we are responsible for, such as deliveries

We are trying to encourage those who can to use the train

M1. Has your business undertaken any of the following...?

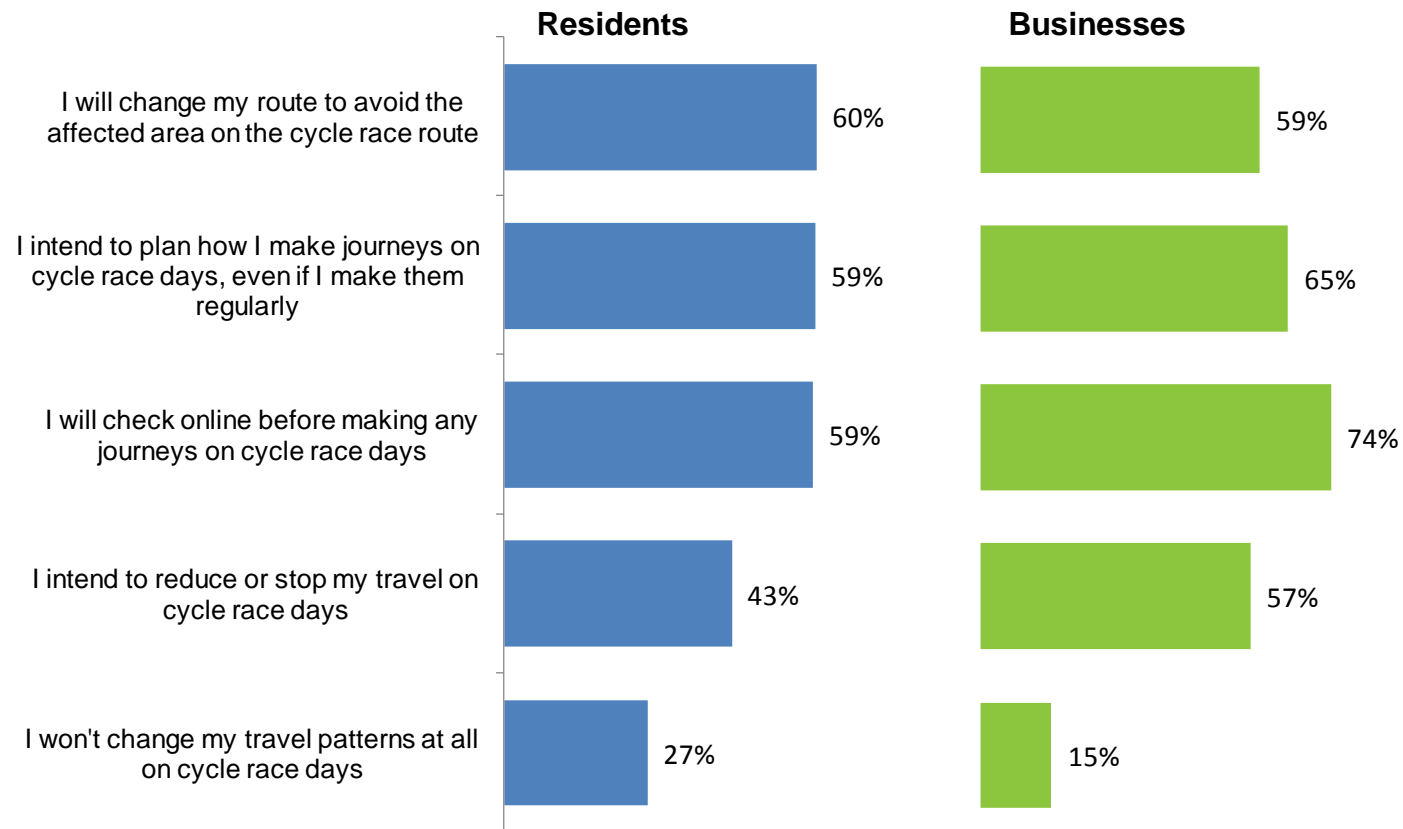
M2. What actions has your business taken to address any potential problems (for example due to parking or stopping restrictions) that may occur because of the Olympic cycle races that will come through South West London?

All Businesses 100

Planning travel on race days

Majority of residents and businesses intend to take some form of action on race days

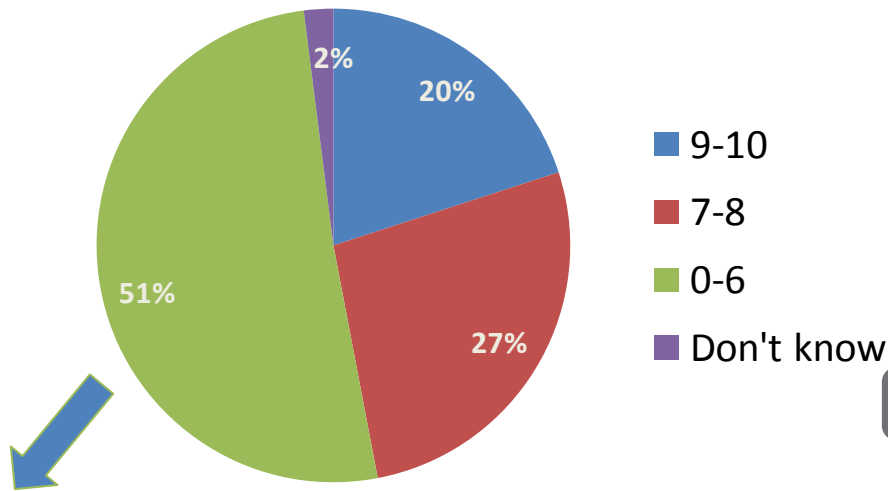
Businesses more likely than residents to use online sources to check travel conditions before making journeys



Business preparedness

As seen with the ORN research, most businesses do not consider themselves to be fully prepared

When asked how well prepared would you say your business is to adapt to the changes that are planned for race days, half give a rating of 0 – 6 out of 10 (0 = not at all prepared, 10 = fully prepared)



66% of businesses in the ORN research said they are 0 – 6 out of 10 prepared for planned changes to the road network during the Games

32% have not thought about it yet

Nothing has been done and we haven't been sent any information

It's still early days in terms of detailed planning.






We'll just play it by ear.

We just don't really plan that far ahead. We can make minor adjustments fairly easily at short notice.

Websites used for information

As with the ORN research, the London 2012 or TfL websites would be the first ports of call for residents and businesses for information on the cycle races. A fifth would check council websites

Very low awareness of GAOTG.com

UNPROMPTED	Residents	Businesses
 Transport for London	36%	36%
	38%	32%
	25%	22%
 	20%	22%

UNPROMPTED	
	
Residents	None
Businesses	6 businesses (6%)
ORN Londoners	28 people 2%
ORN Businesses	4 businesses 3%

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