

Awareness of the Olympic and
Paralympic Route Network
WAVE 2

Job Number 11208

July 2012

Content

- 1 Awareness of changes to road network and the ORN/PRN/Games lanes
- 2 Knowledge of the changes
- 3 Communications
- 4 Road events
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Brief methodology

Two waves of an online survey have been conducted amongst residents in London and the home counties, and London business decision makers

- The questionnaire was agreed with TfL in advance and programmed into the online survey platform
 - An established online research panel was used to recruit respondents to take part in the study
- Two waves of interviewing have taken place – the first in April 2012, and the second in June 2012
 - In each wave approximately 1,200 Londoners broken down by borough in to three ‘tiers’ depending on the level of impact the ORN/PRN is expected to have within each borough
 - Quotas were imposed to ensure that the sample was broadly representative in terms of basic demographics, additionally a screening process was used so that at least 75% of the sample had driven in London in the past six months
 - Within the analysis a simple weight on age and gender has been applied within tier; each tier has equal weight
- In each wave approximately 300 interviews were completed amongst those living in the home counties
 - Quotas were imposed to ensure that the sample was broadly representative in terms of basic demographics, additionally a screening process was used so that at least 75% of the sample had driven in London in the past year
 - Within the analysis a simple weight on age and gender has been applied
- 150 interviews were conducted online with senior decision makers within businesses on or around the ORN/PRN each wave

Awareness

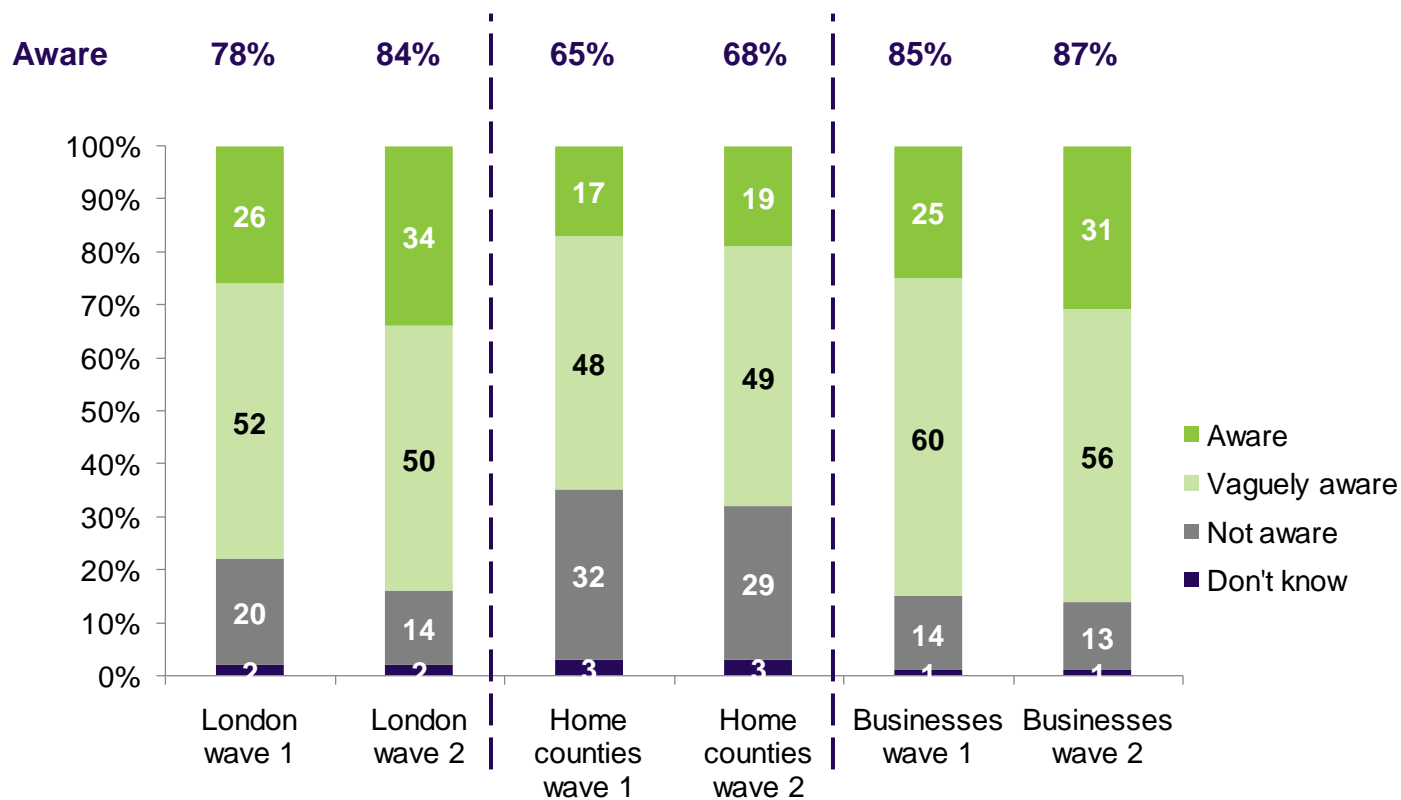
Awareness summary

Top level awareness is high, but reduces around specifics

	London		Home Counties		Businesses	
	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
% aware of changes to the road network during the 2012 Olympic Paralympic Games	78%	84%	65%	68%	85%	87%
% aware of Olympic/Paralympic Route Networks	ORN: 61% PRN: 45%	ORN: 71% PRN: 57%	ORN: 49% PRN: 32%	ORN: 54% PRN: 40%	ORN: 61% PRN: 42%	ORN: 79% PRN: 63%
% aware of Games lanes	52%	62%	44%	45%	54%	70%
% aware of the routes covered by the ORN/PRN network	46%	55%	26%	38%	46%	57%

Awareness of road changes

Londoners are significantly more likely to be aware of road changes than last wave; for other groups only small increases in awareness are seen



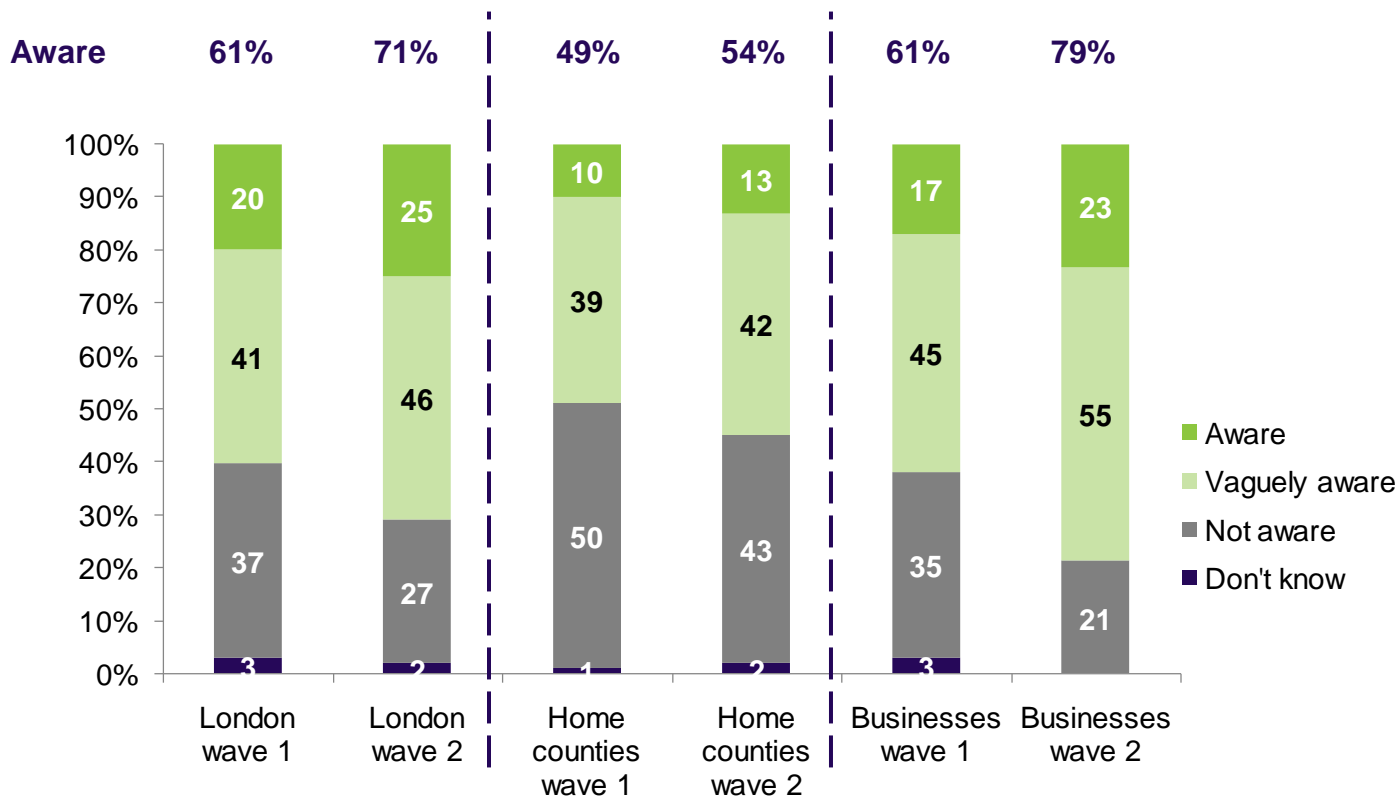
Customer awareness (London + Home Counties)		Wave 1	Wave 2
Area of London			
London Tier 1		82%	83%
London Tier 2		82%	88%
London Tier 3		71%	81%
Frequency of travel on ORN/PRN			
Weekly		86%	89%
Monthly		76%	85%
Less often/never		64%	69%
Will use ORN/PRN during Games			
Yes		85%	87%
No		70%	77%
Seen ORN/PRN communications			
Yes		96%	96%
No		69%	70%

B4a Are you aware of any changes to the road network in London during the 2012 Olympic and Paralympic Games?
 All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Awareness of ORN

Awareness of the ORN has risen amongst all groups

Around three quarters of Londoners and businesses are now at least 'vaguely aware'



Customer awareness (London + Home Counties)		Wave 1	Wave 2
Area of London			
London Tier 1		68%	71%
London Tier 2		62%	76%
London Tier 3		52%	66%
Frequency of travel on ORN/PRN			
Weekly		71%	79%
Monthly		59%	65%
Less often/never		44%	55%
Will use ORN/PRN during Games			
Yes		72%	77%
No		51%	63%
Seen ORN/PRN communications			
Yes		88%	89%
No		49%	53%

B6. The Olympic Games will take place between 27 July and 12 August 2012.

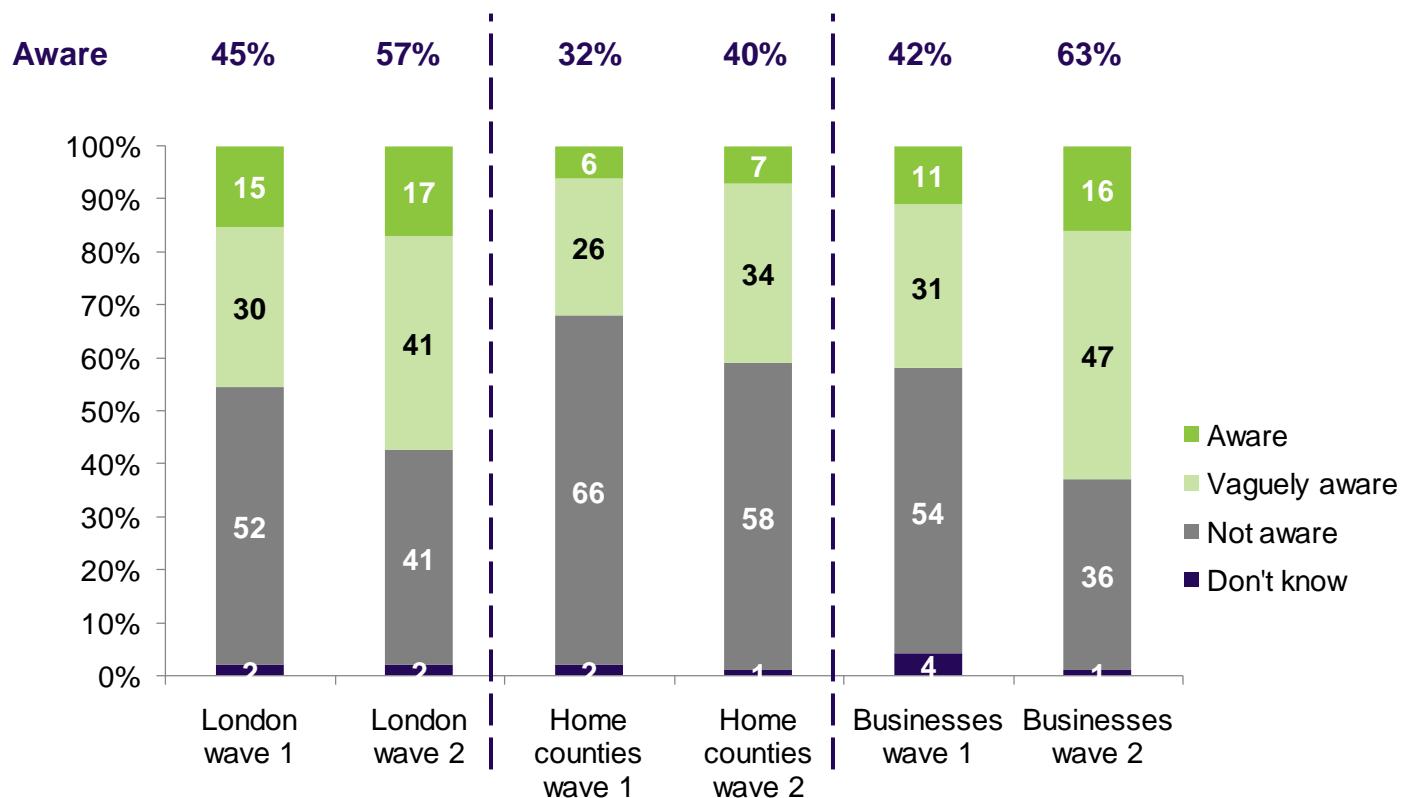
Some roads have been identified as critical to the running of the 2012 **Olympic Games** these are called the Olympic Route Network

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Awareness of PRN

Significant increase in awareness of the PRN for all groups, although overall awareness of PRN remains behind ORN

Home counties respondents remains less aware than Londoners and businesses



Customer awareness (London + Home Counties)		Wave 1	Wave 2
Area of London			
London Tier 1		54%	59%
London Tier 2		46%	60%
London Tier 3		36%	53%
Frequency of travel on ORN/PRN			
Weekly		54%	67%
Monthly		41%	53%
Less often/never		31%	39%
Will use ORN/PRN during Games			
Yes		54%	64%
No		36%	48%
Seen ORN/PRN communications			
Yes		72%	73%
No		33%	41%

B7. Likewise, some roads have been identified as critical to the running of the London 2012 **Paralympic Games** (which take place between 29 August and 9 September 2012). These are called the Paralympic Route Network.

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Expected travel changes

Increased awareness of each of the road changes tested

Businesses generally more aware than Londoners and home counties residents

	London		Home counties		Businesses	
	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
Games lanes	74%	76%	68%	79%	70%	82%
Road closures	67%	71%	58%	70%	62%	72%
Lane closures / restrictions	61%	64%	58%	60%	56%	63%
Parking / stop restrictions	54%	61%	49%	51%	48%	50%
Parking bay suspensions	42%	48%	32%	39%	45%	50%
Bus stops suspended	31%	36%	25%	30%	23%	32%
Restricted turns	29%	35%	20%	26%	15%	26%
Traffic signal timing changes	26%	30%	15%	21%	11%	24%
Bus lane suspensions	25%	30%	18%	26%	20%	22%
Cycling restrictions	17%	18%	8%	18%	9%	9%
Changes on ped. crossings	16%	16%	10%	14%	5%	12%
None of the above	2%	2%	6%	2%	6%	4%

Figures are % of those aware there will be changes to road network during the Games

Games lanes = "lanes allocated to Olympic and Paralympic Traffic only"

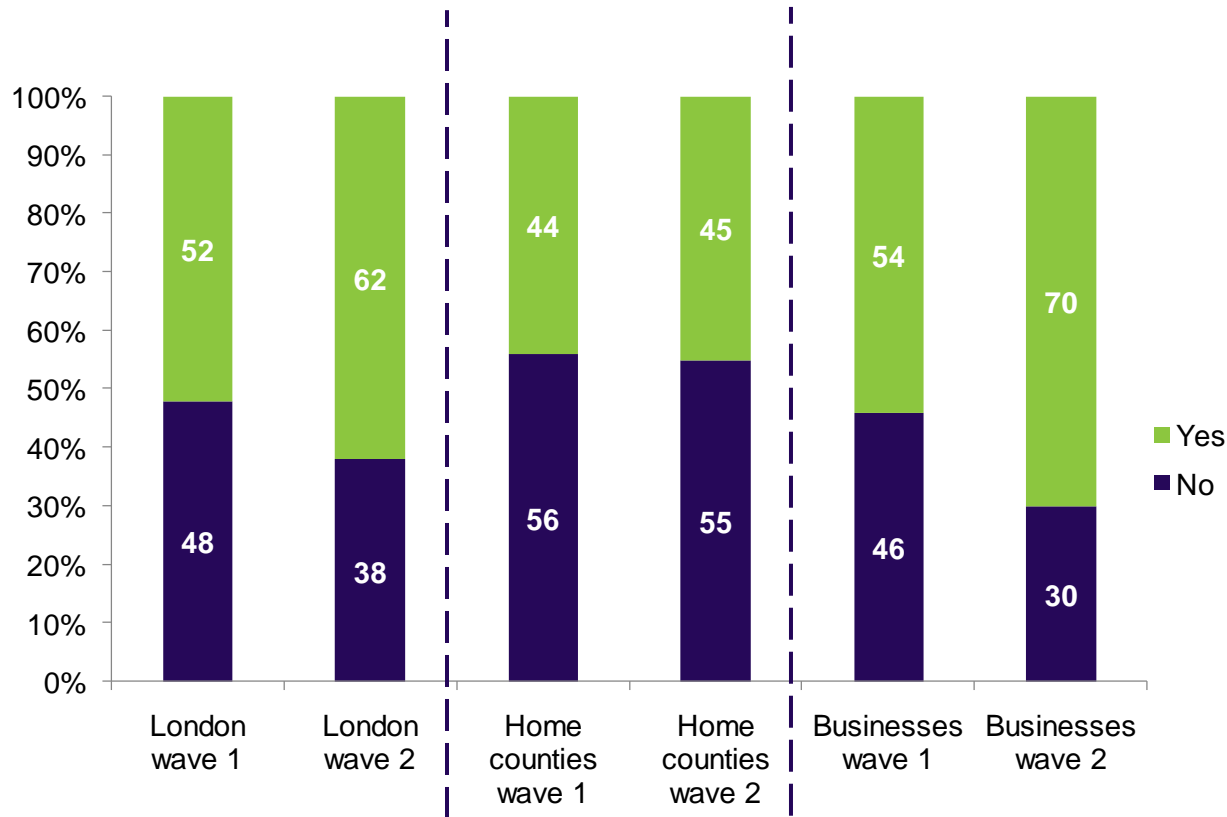
Net heard of lane closures		
	Wave 1	Wave 2
London	86%	85%
Home Counties	80%	89%
Businesses	78%	87%

B5. What changes to the roads have you heard of that will be in place during the Games?
 All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Awareness of Games lanes

Londoners and businesses are significantly more aware of Games lanes compared to last wave

Those from the home counties remain less likely to be aware



Customer awareness (London + Home Counties)		Wave 1	Wave 2
Area of London			
London Tier 1		53%	62%
London Tier 2		57%	65%
London Tier 3		47%	59%
Frequency of travel on ORN/PRN			
Weekly		57%	64%
Monthly		54%	65%
Less often/never		42%	49%
Will use ORN/PRN during Games			
Yes		59%	67%
No		47%	58%
Seen ORN/PRN communications			
Yes		78%	80%
No		41%	44%

C6b. Before this survey, were you aware that there were going to be **Games Lanes**?

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

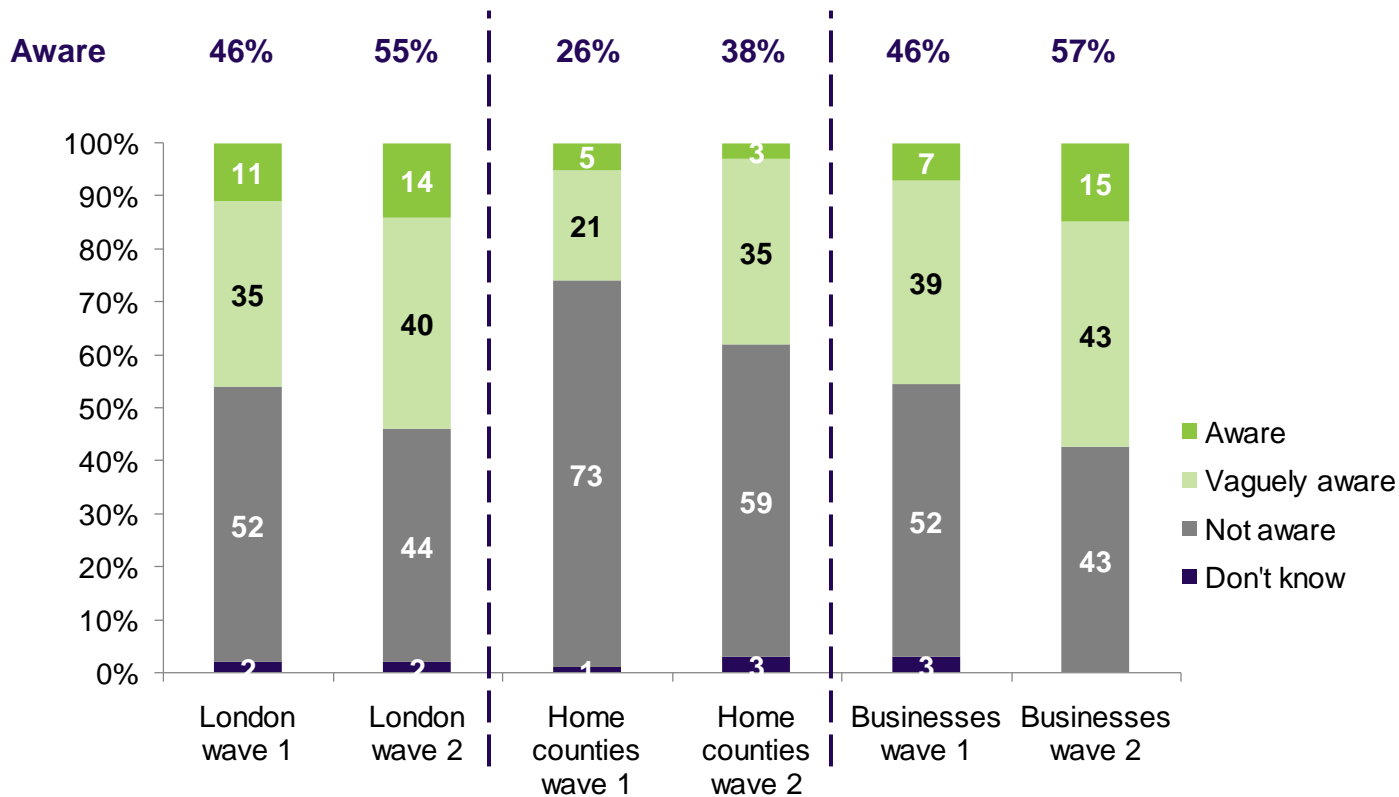
Olympic and Paralympic Route Network

Awareness of ORN/PRN route



Awareness of routes has risen for this wave – significant increases amongst Londoners and home counties residents

Businesses are the most aware of the specific route



Customer awareness (London + Home Counties)	Wave 1	Wave 2
Area of London		
London Tier 1	56%	59%
London Tier 2	46%	57%
London Tier 3	36%	48%
Frequency of travel on ORN/PRN		
Weekly	60%	67%
Monthly	39%	48%
Less often/never	24%	34%
Will use ORN/PRN during Games		
Yes	59%	64%
No	33%	45%
Seen ORN/PRN communications		
Yes	74%	75%
No	32%	35%

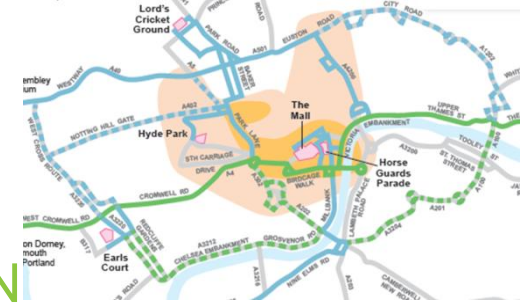
B8. Before taking part in this survey were you aware that the roads shown on this map make up the Olympic Route Network and Paralympic Route Network?

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Expectation to travel on / around Central ORN/PRN

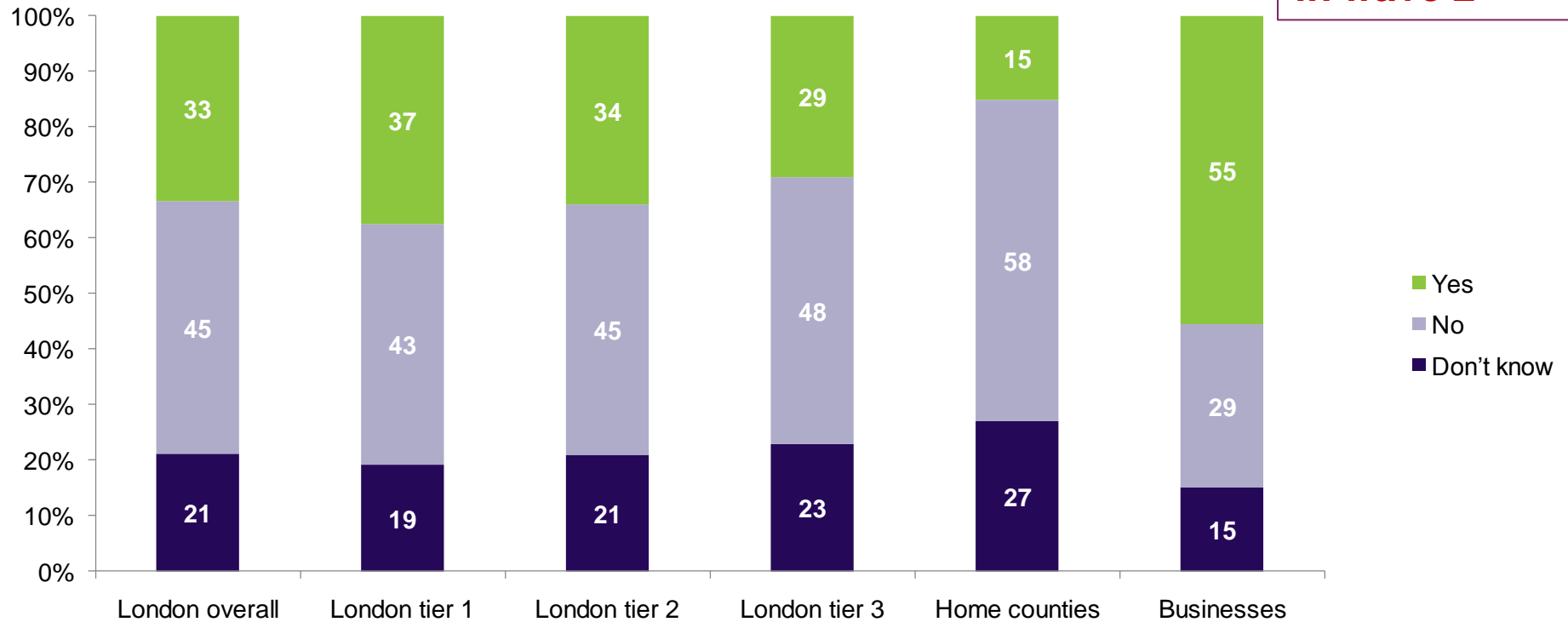
Only a third of Londoners, and more than half of businesses plan to travel on / around Central ORN / PRN

Home counties residents are much less likely



Intention to drive on the Central ORN/PRN

NB: only asked in wave 2

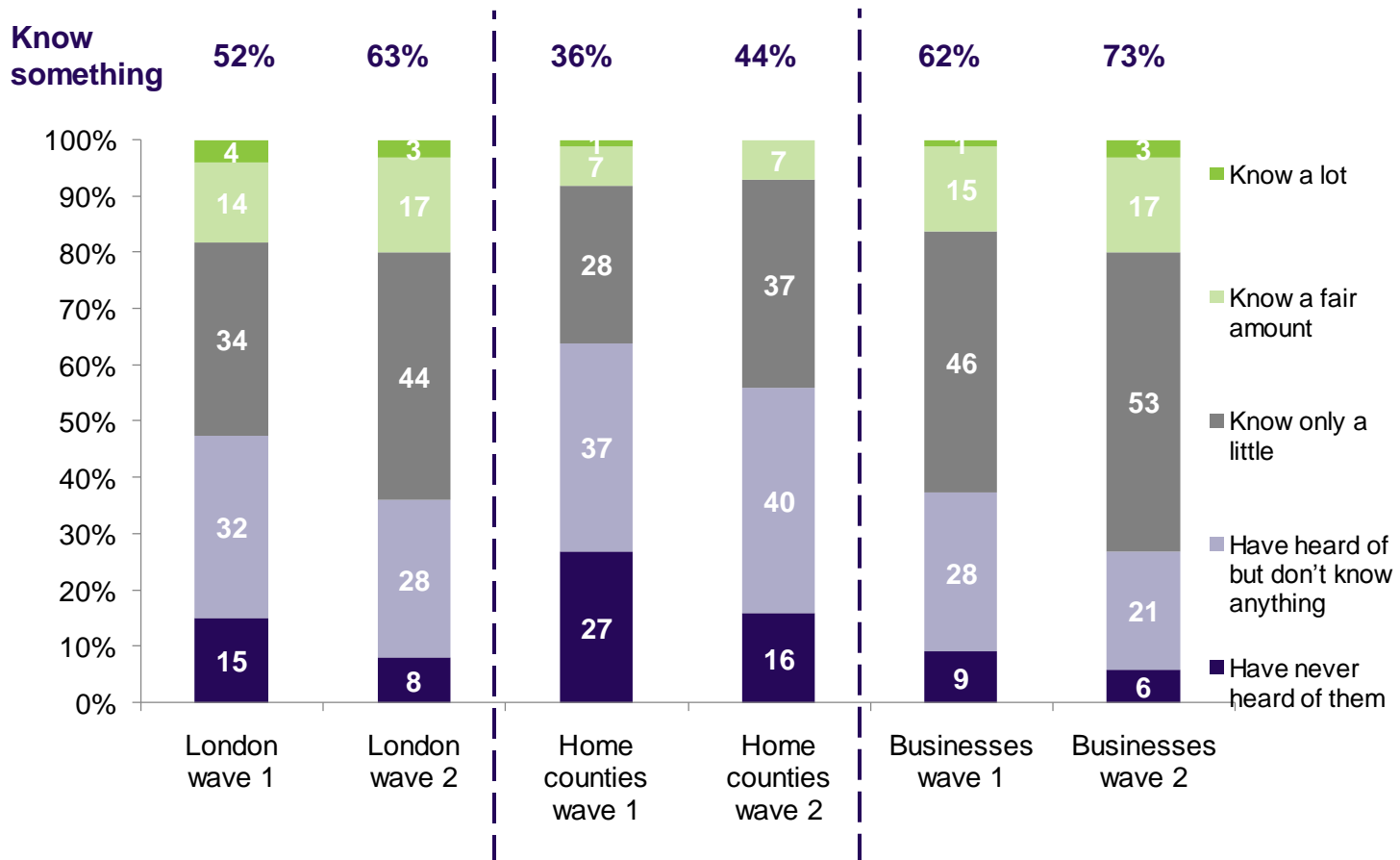


B3b Do you expect to travel on or around any of these roads in the central London area during the London 2012 Olympic and Paralympic Games?
 All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 – NOT ASKED)

Perceived knowledge of ORN/PRN

The proportion of each group knowing at least 'a little' about the ORN/PRN has risen significantly

Home counties residents remain less aware than Londoners and businesses



Net customer know something (London + Home Counties)		
	Wave 1	Wave 2
Area of London		
London Tier 1	60%	66%
London Tier 2	53%	65%
London Tier 3	45%	58%
Frequency of travel on ORN/PRN		
Weekly	67%	76%
Monthly	51%	60%
Less often/never	29%	40%
Will use ORN/PRN during Games		
Yes	67%	73%
No	37%	52%
Seen ORN/PRN communications		
Yes	83%	82%
No	38%	44%

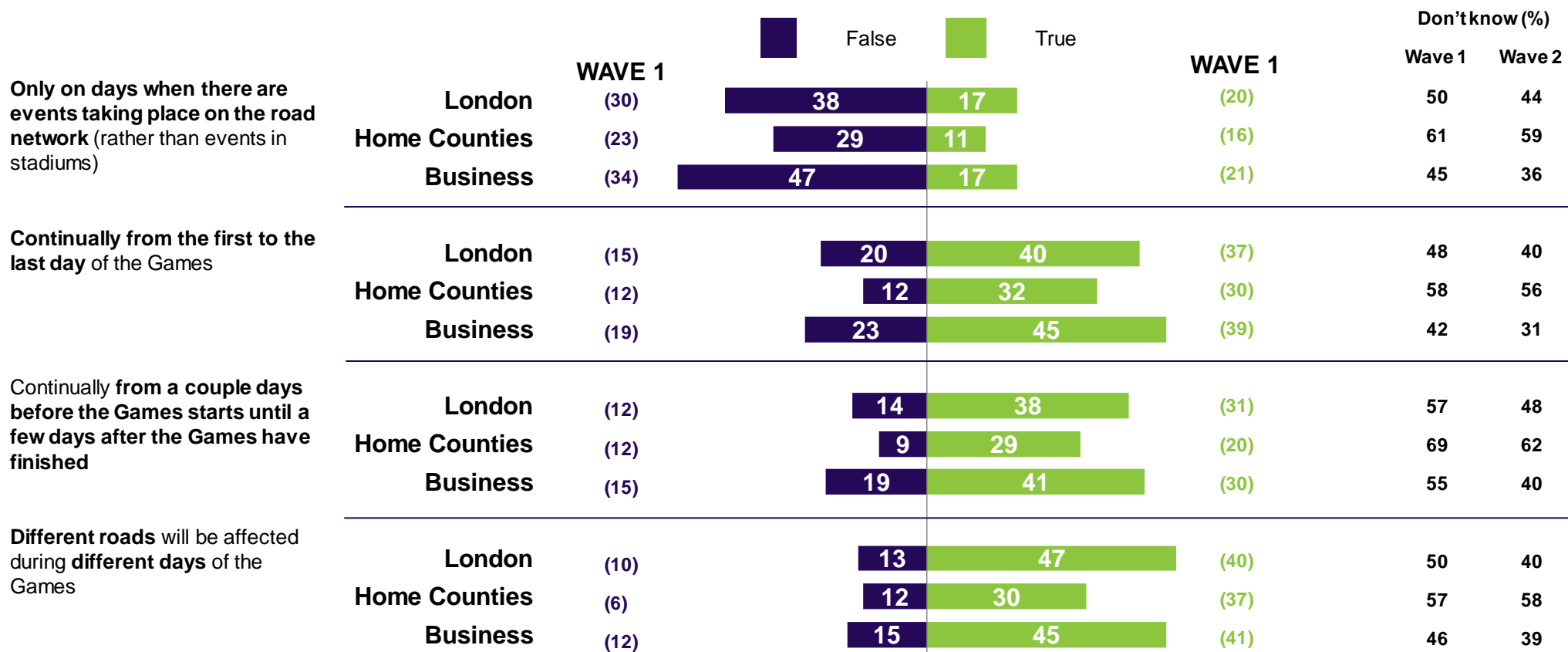
C1. The Olympic Route Network and Paralympic Route Network are a network of roads connecting venues, accommodation and transport hubs across London. How much do you know about the Olympic and Paralympic Route Networks?

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Dates of operation

There remain substantial numbers who are unsure when the ORN and PRN will be in operation

But few think that ORN and PRN will only be operational on road event days



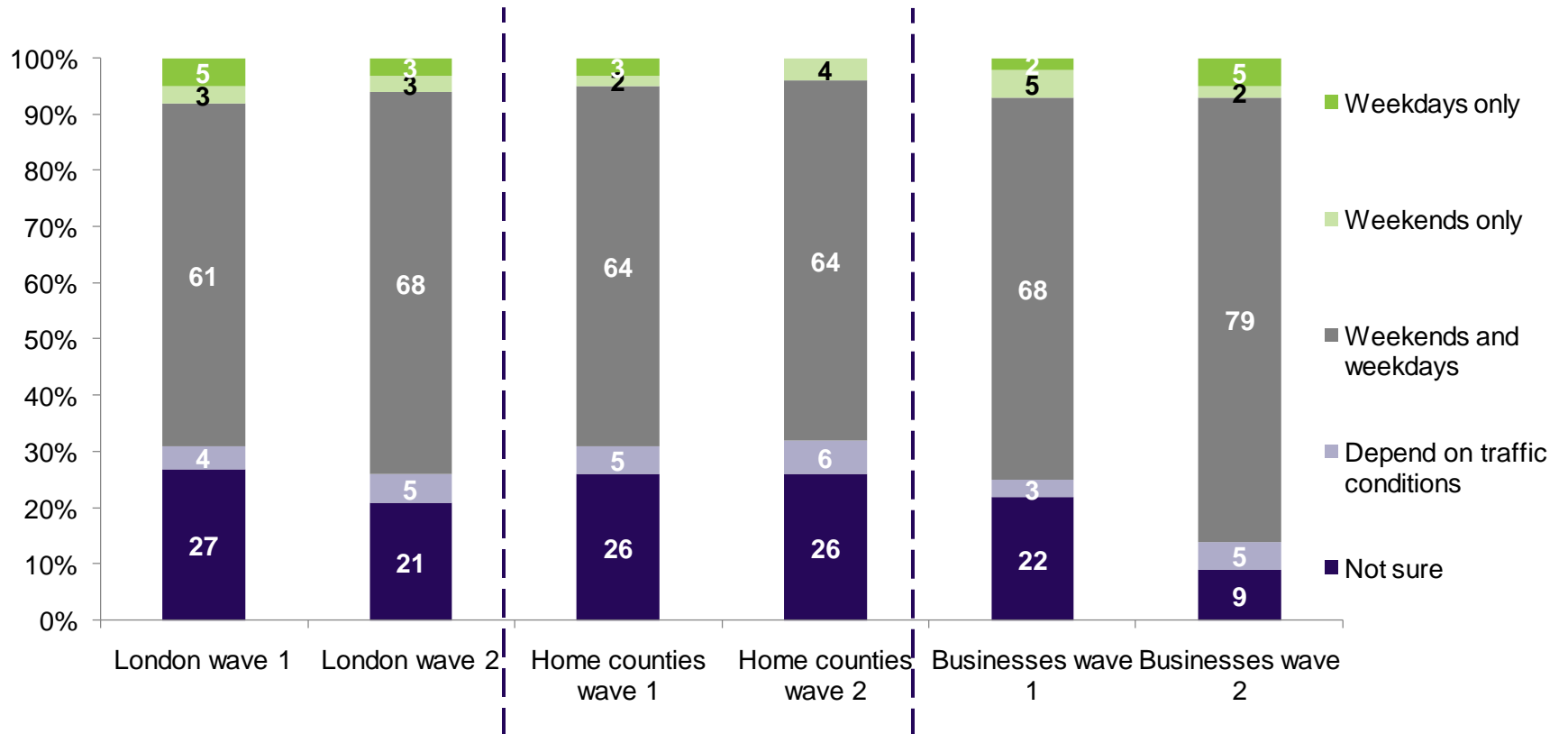
C2. Which of the following statements relating to the Olympic and Paralympic Route Networks are true and which are false? If you do not know please say so.

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Days of operation

Fewer Londoners and businesses are now unsure of the days of operation

Most continue to think that the ORN and PRN will be in operation both at weekends and during the week

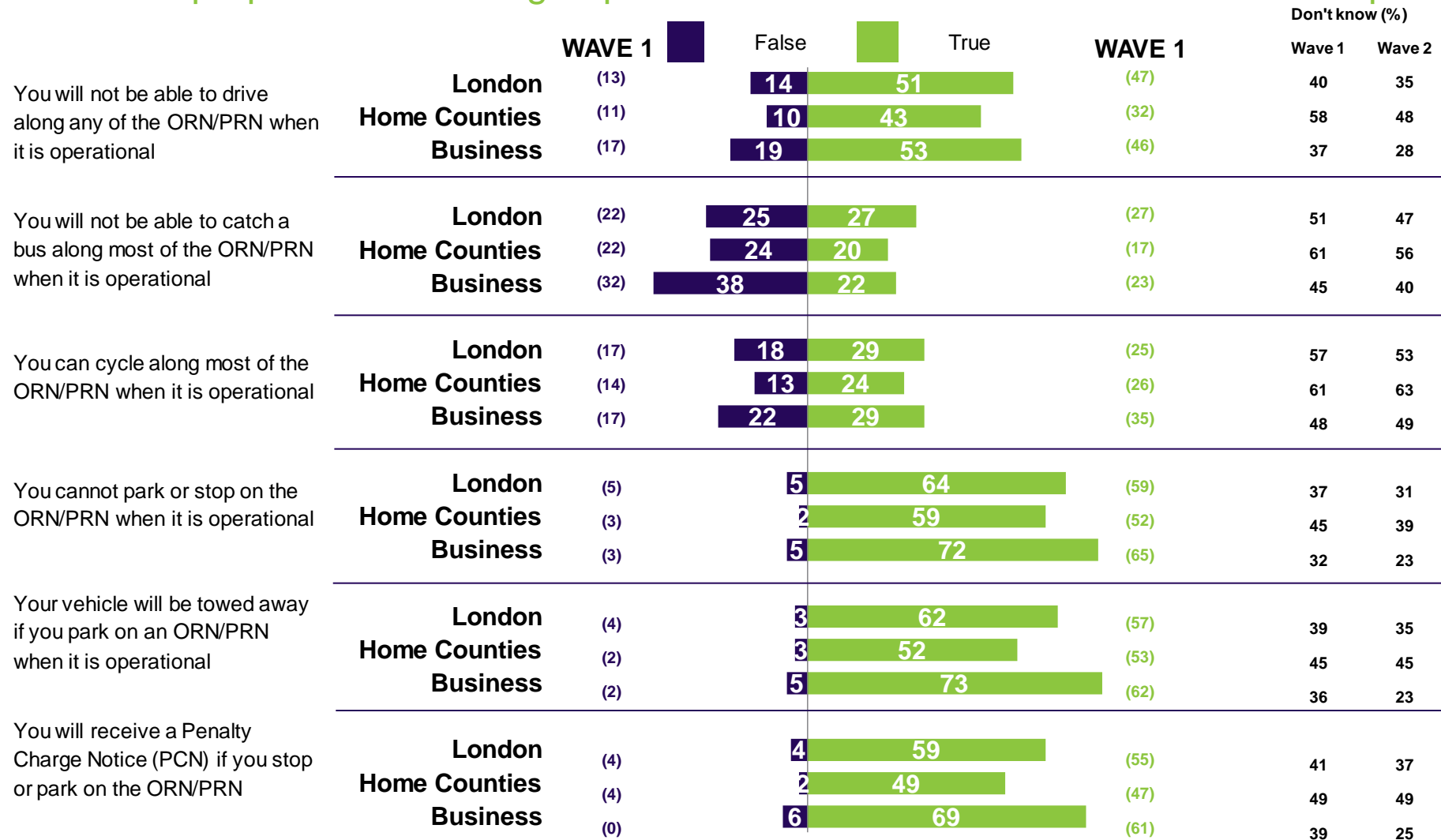


C3. What about these statements, which one do you think is true?

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Restrictions in place

Substantial proportions of each group remain unsure of what restrictions will be in place



C5. Which of the following statements relating to the Olympic and Paralympic Route Networks are true and which are false? If you do not know please say so.

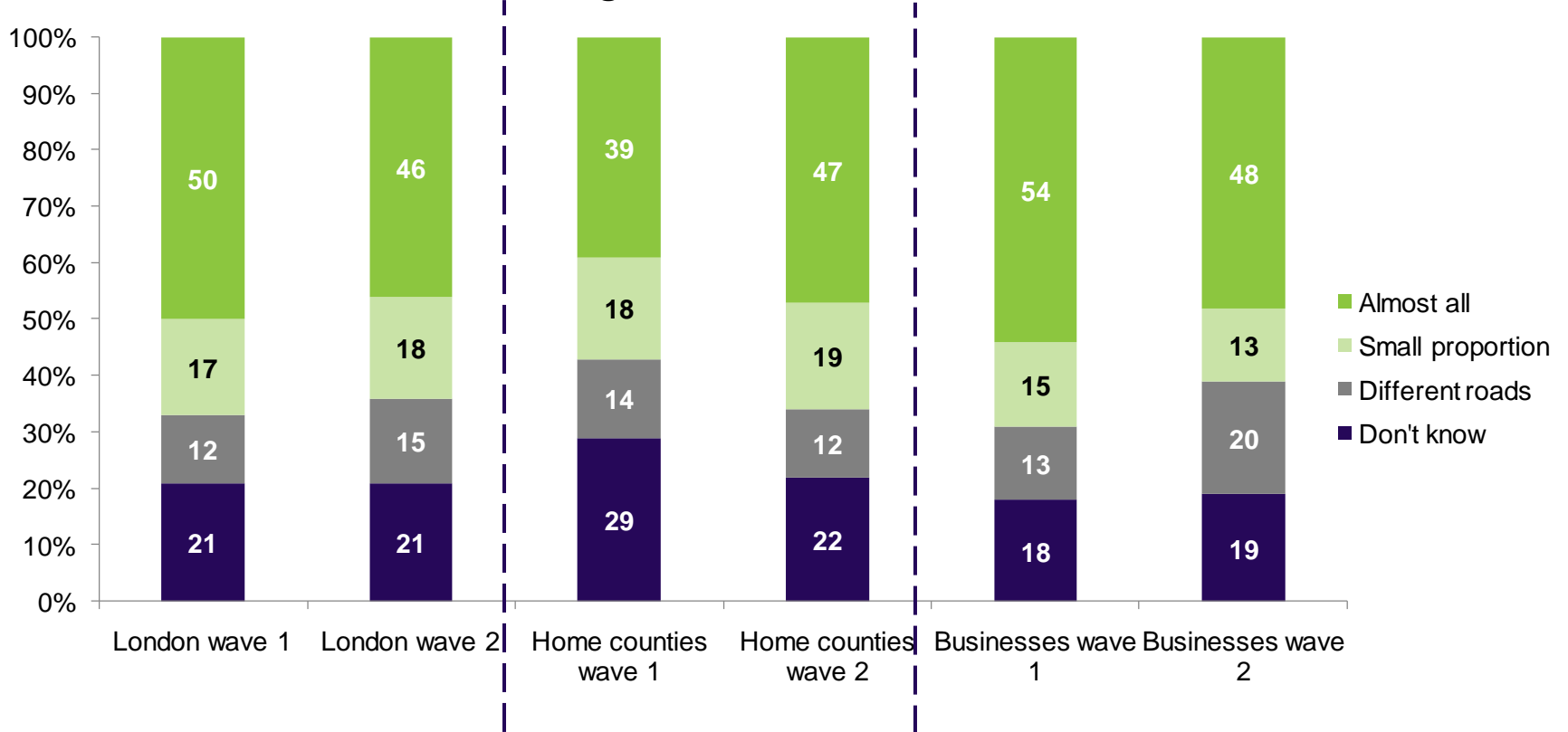
All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Extent of road closures

One fifth are still unsure of the extent of road closures

The proportions of Londoners and businesses that think road closures will affect almost all the ORN/PRN have decreased slightly this wave

There will be road closures along ... of the ORN/PRN



C6a. You mentioned that you have heard there will be lane closures / lanes allocated to the Olympics and Paralympics during the Games. Lane closures will occur to enable Games related traffic to access key locations. Which of the following do you think is correct?

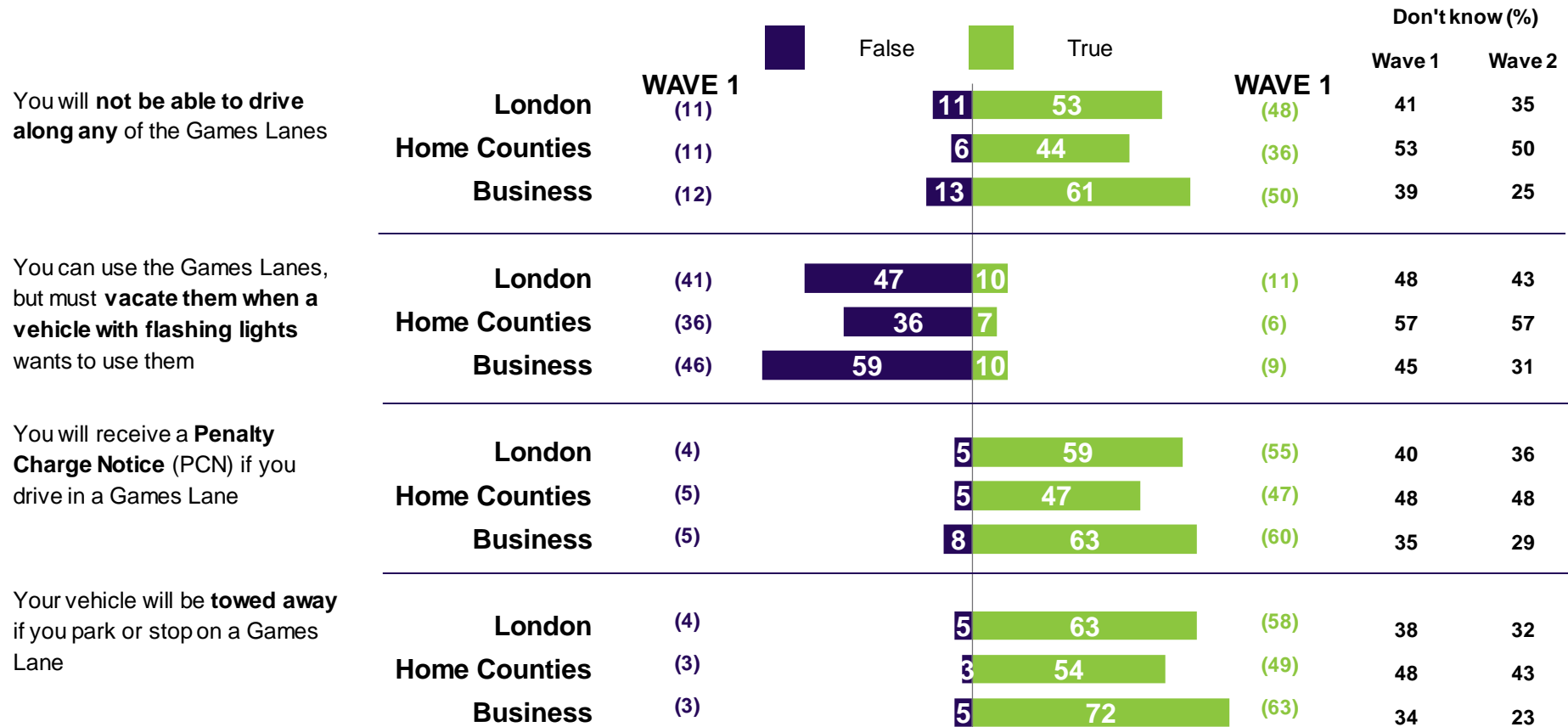
All aware of lane closures or lanes for Games

(Wave 2 - London 866, Home counties 212, Businesses 113) (Wave 1 - London 818, Home counties 156, Businesses 103)

Games lane knowledge (1)

There continues to be very little false understanding of the Games lanes

However, substantial proportions still do not know for any of the elements tested

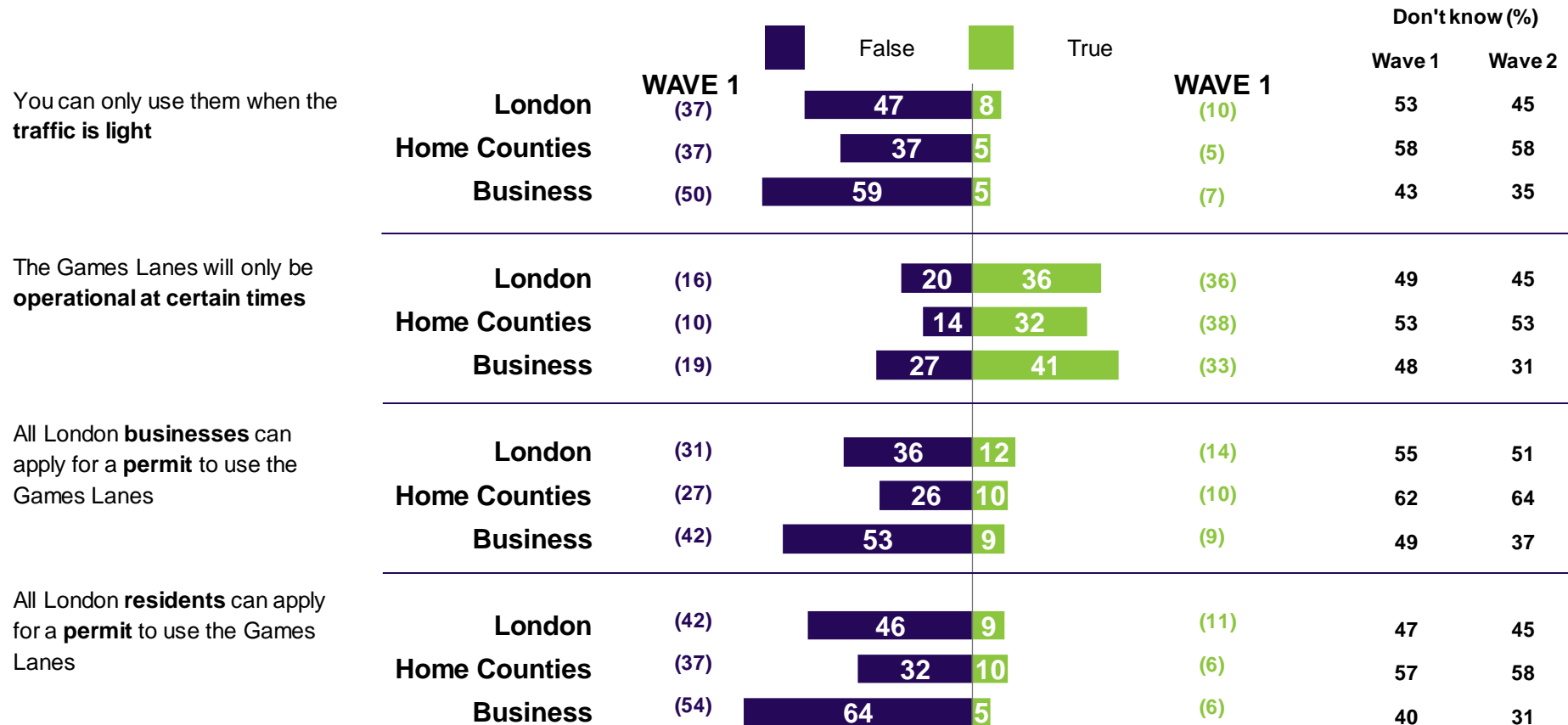


C8. Which of the following statements about the Games Lanes are true and which are false? If you do not know please say so.
 All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Games lane knowledge (2)

There continues to be very little false understanding of the Games lanes

However, substantial proportions still do not know for any of the elements tested

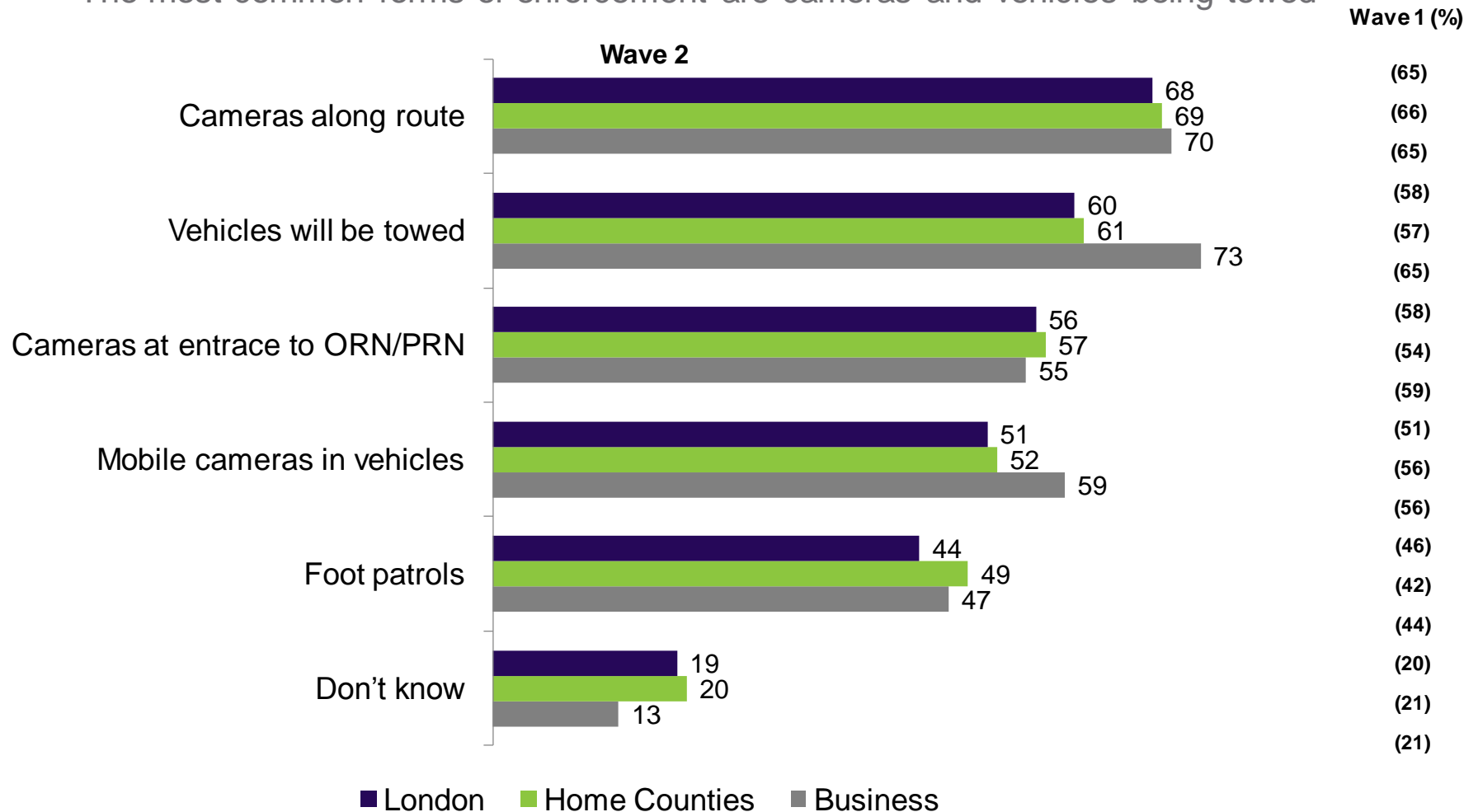


C8. Which of the following statements about the Games Lanes are true and which are false? If you do not know please say so.
 All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Enforcement

Most Londoners expect there to be some form of enforcement in place

The most common forms of enforcement are cameras and vehicles being towed



C9. Which, if any, of the following do you think will be used to enforce the Olympic and Paralympic Route Networks and Games Lanes?
 All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

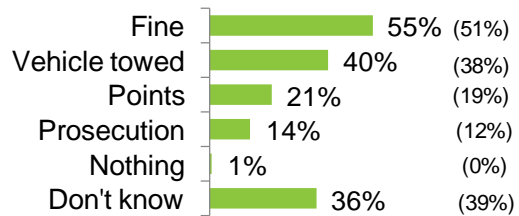
Driving/stopping in the ORN/PRN, and ‘Games lanes’

Very few respondents think it will be easy to drive on a Games lane or park/stop on the ORN/PRN

Fines are the most commonly expected penalty

Penalties for driving or stopping in Games lane

→ Half of respondents expect the penalty for driving or stopping in a Games lane to be a fine; over a third don't know



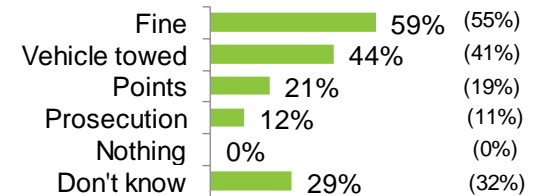
→ The average fine expected by:

- Customers is £140 (£85)
- Businesses is £134 (£93)

→ Only 9% of respondents think it will be easy to drive or stop in a Games lane

Penalties for parking or stopping on the ORN/PRN

→ Over half of respondents expect the penalty for parking/stopping on the ORN/PRN to be a fine



→ The average fine for parking stopping is expected by:

- Customers is £144 (£88)
- Businesses is £139 (£94)

→ The average cost if vehicle is towed expected by

- Customers is £260 (£152)
- Businesses is £271 (£166)

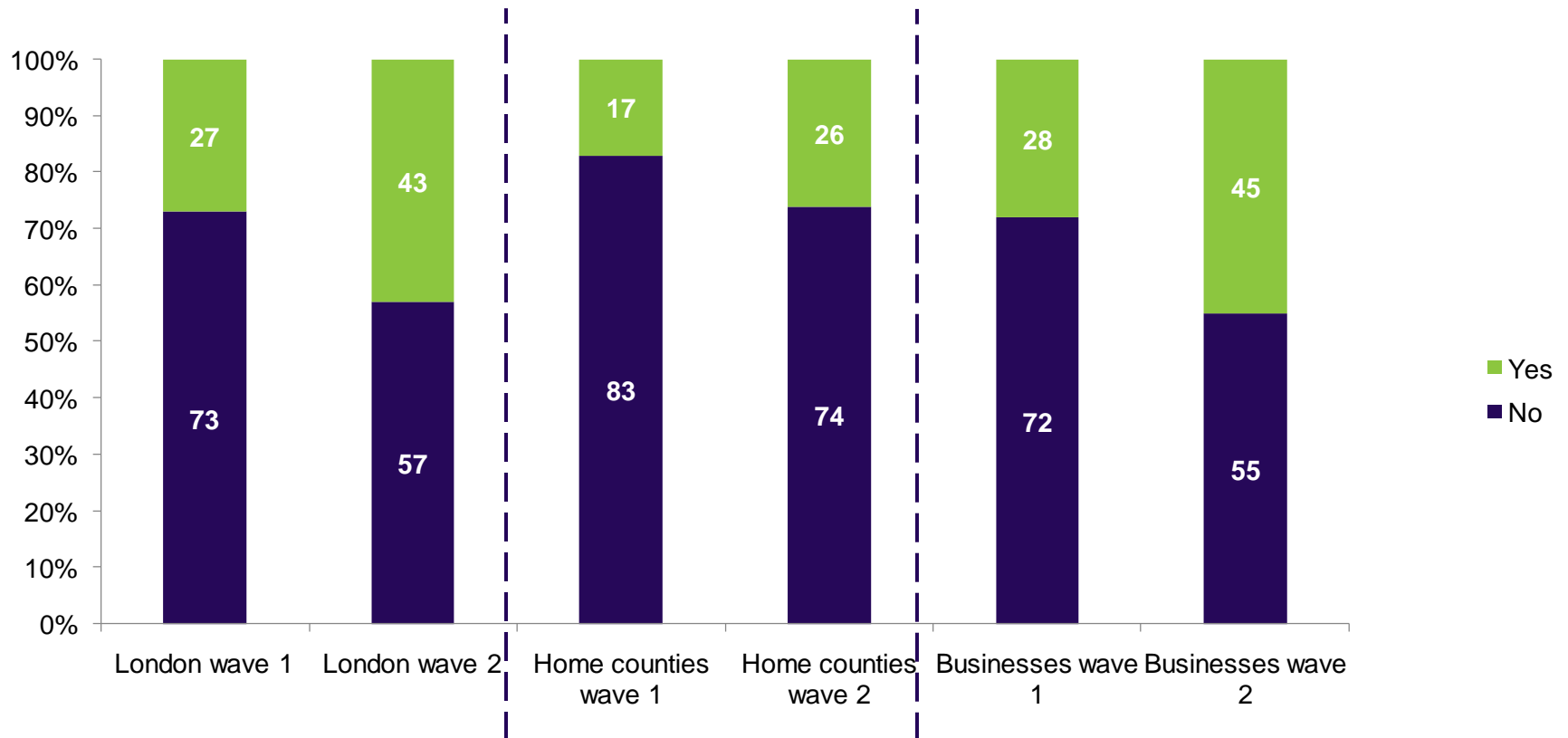
→ 7% of respondents think it will be easy to park or stop on the ORN/PRN

ORN/PRN communications

Awareness of advertising

More than two in five Londoners and businesses have seen advertising / communications about the ORN / PRN, up from a quarter last wave

Awareness amongst home counties residents has also risen but remains lower



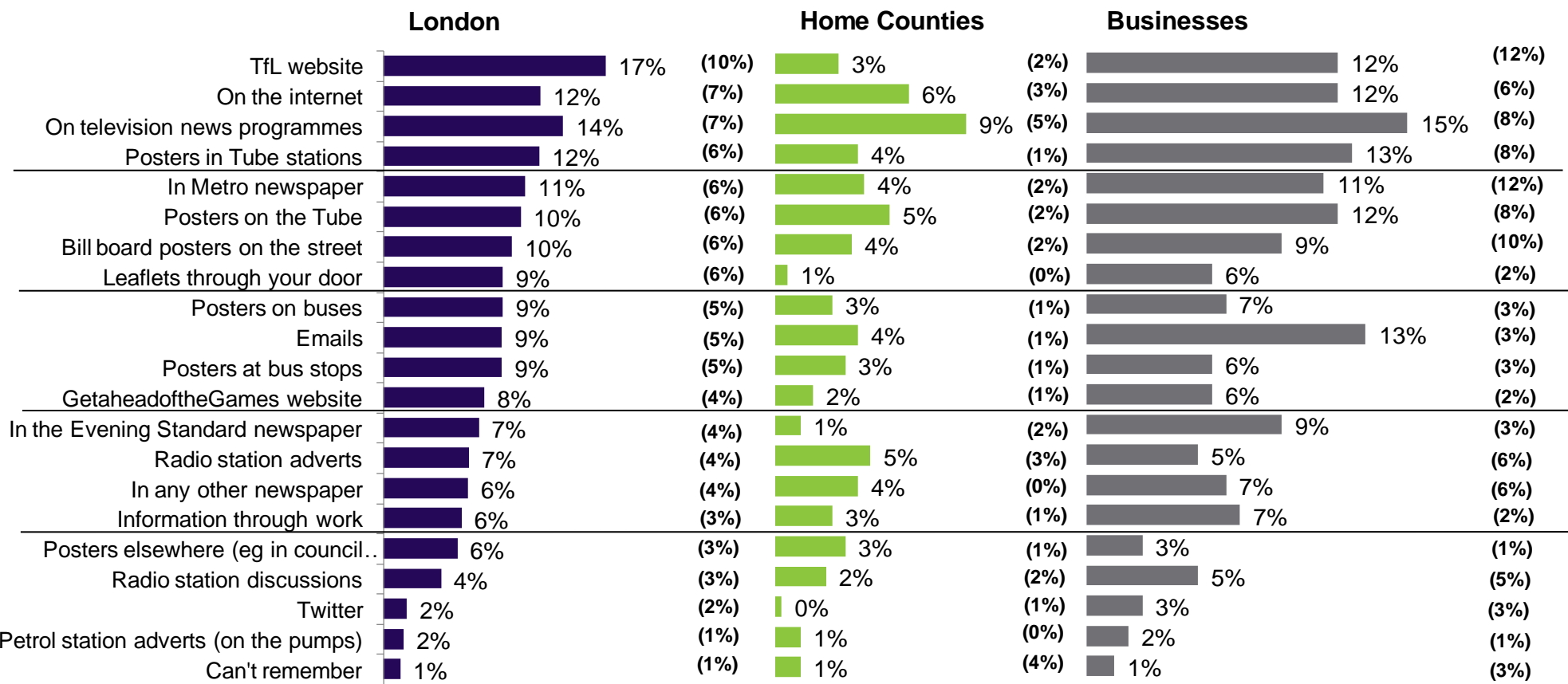
F2. Before taking part in this survey have you seen any advertising or other communications about the Olympic or Paralympic Route Network or Games Lanes?

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Communications seen

The TfL website is a key source of ORN/PRN information for Londoners

Those in the Home Counties are less likely to have seen any communications, but when they have, discussion in television programmes is the most likely source recalled



F3. Where have you seen adverts or messages about the Olympic or Paralympic Route Network?

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

QUESTION PROMPTED ASKED OF THOSE AWARE OF ANY COMMS REBASED TO ALL

Websites used for information

All groups are most likely to visit TfL's website for more information on the ORN/PRN

Some awareness of GAOTG.com, but very little use so far





UNPROMPTED

London

Home counties

Businesses

UNPROMPTED

	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
 Transport for London	45%	49%	37%	36%	54%	55%
	19%	18%	19%	22%	21%	23%
	6%	7%	12%	9%	6%	7%
	6%	8%	7%	9%	8%	11%

Get Ahead of the Games		
	Wave 1	Wave 2
London	28 people (2%)	102 people (8%)
Home Counties	1 person (0%)	9 people (3%)
Businesses	4 bus. (3%)	5 bus. (3%)

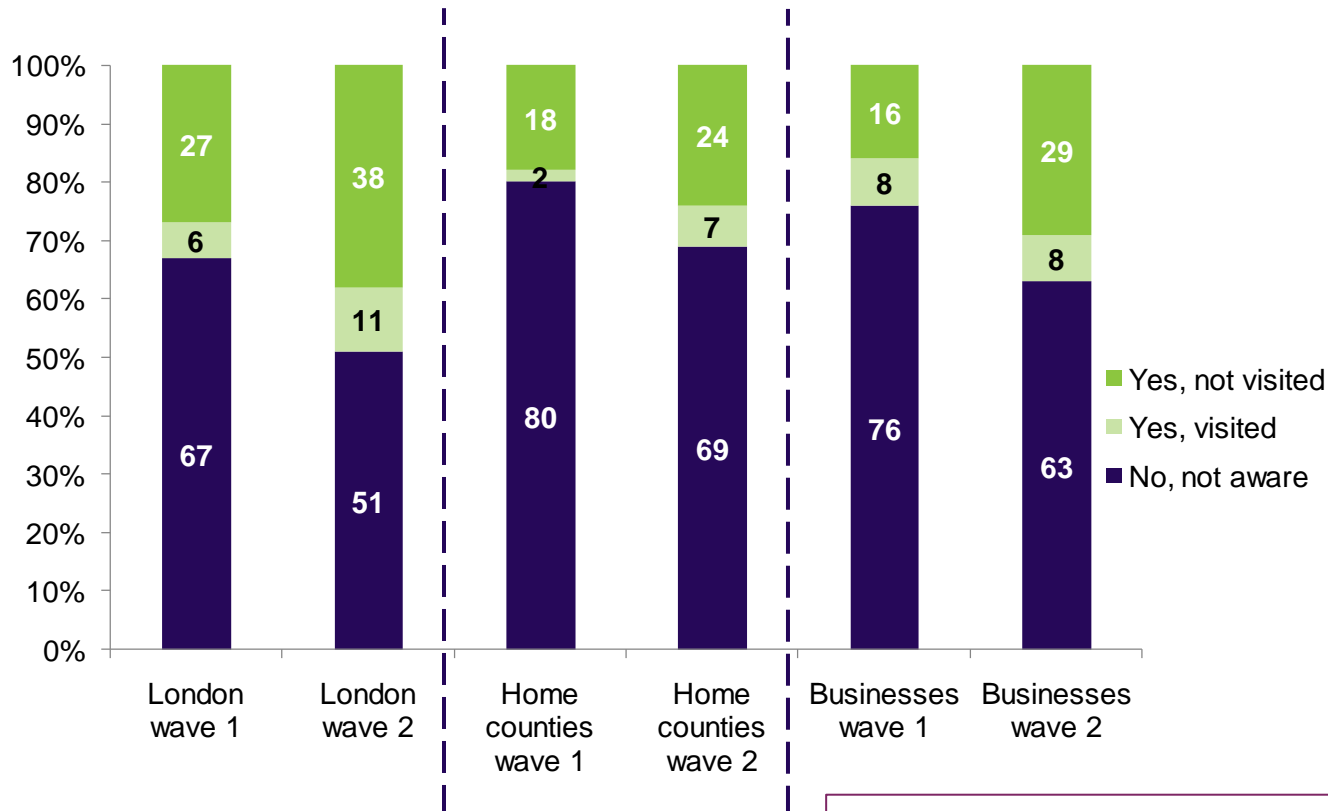
F4 If you wanted to find out more information about the Olympic or Paralympic Route Network what websites would you visit to find out?
 All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

getaheadofthegames.com

Slight increase in the number of Londoners and home counties residents who have visited getaheadofthegames.com

Awareness has increased amongst all groups

Awareness of getaheadofthegames.com



Customer awareness (London + Home Counties)		Wave 1	Wave 2
Area of London			
London Tier 1		38%	51%
London Tier 2		33%	49%
London Tier 3		27%	48%
Frequency of travel on ORN/PRN			
Weekly		40%	56%
Monthly		29%	46%
Less often/never		20%	33%
Will use ORN/PRN during Games			
Yes		41%	54%
No		23%	39%
Seen ORN/PRN communications			
Yes		55%	65%
No		22%	32%

Most of those who have heard of GAOTG have also heard of the Temporary Road Changes Tool (but very few have used it – small bases)

F5. Have you heard of getaheadofthegames.com

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Planning

Expected travel changes

A little over two in five Londoners expect they will need to change road travel plans during the Games

This figure increases to just over half for businesses

	London		Home Counties		Businesses	
	Wave 1	Wave 2	Wave 1	Wave 2	Wave 1	Wave 2
I expect that I will need to change my travel plans A GREAT DEAL whilst the 2012 Games are running	25%	24%	13%	14%	26%	25%
I expect that I will need to change my travel plans A MODERATE AMOUNT whilst the 2012 Games are running	22%	20%	12%	10%	25%	28%
I expect that I will need to change my travel plans A LITTLE whilst the 2012 Games are running	18%	22%	21%	23%	22%	29%
I DON'T expect I will need to change my travel plans at all whilst the 2012 Games are running	18%	14%	27%	22%	15%	10%
I would not make any journeys by road anyway	10%	12%	19%	23%	8%	7%
Don't know	7%	7%	7%	8%	3%	2%

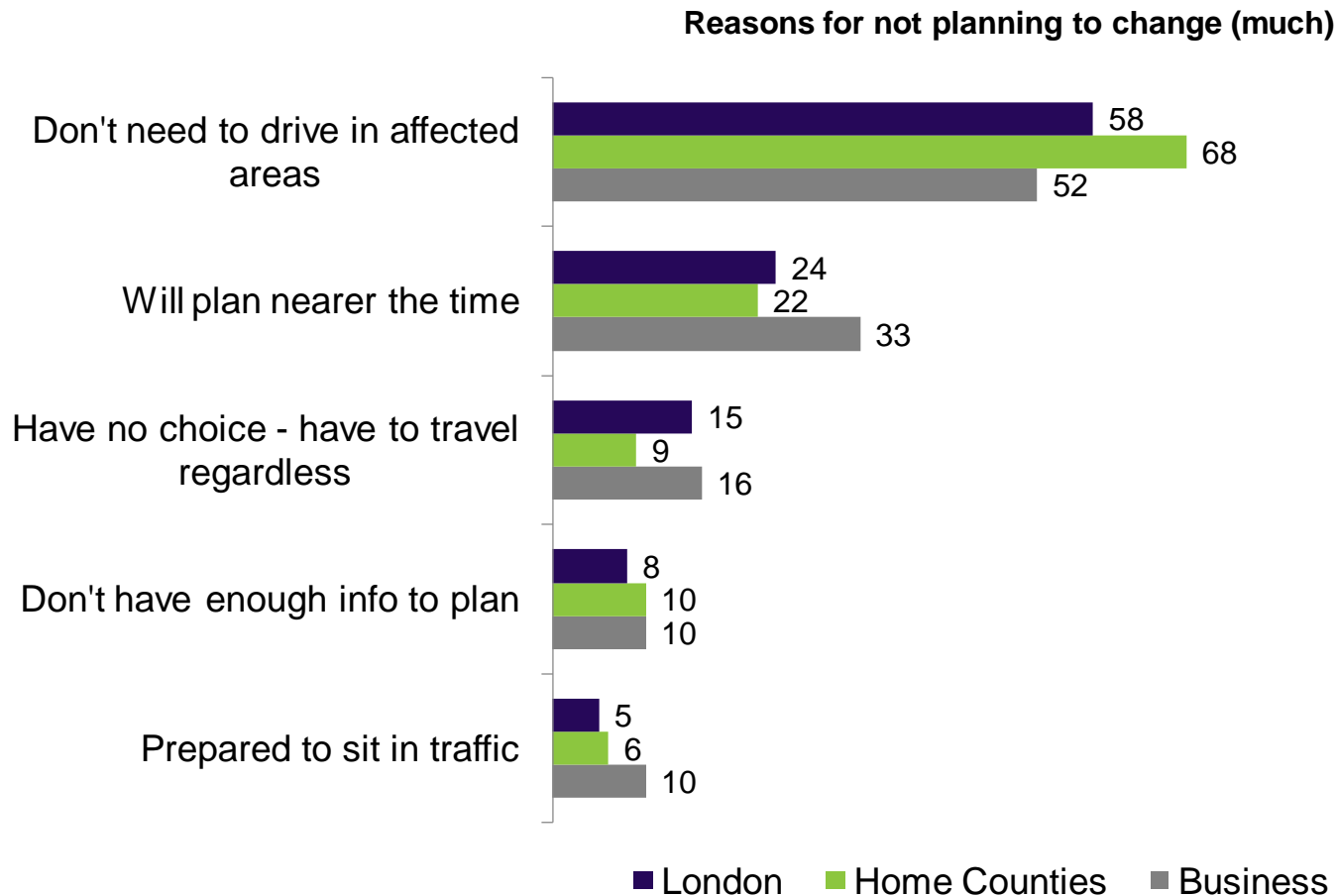
G1. The next few questions relate to your expected travel by car, motorbike, scooter, van or lorry during the London 2012 Games whether you are the driver or passenger. Which of the following statements comes nearest to your view? QUESTION ADAPTED FOR BUSINESS SURVEY All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Reasons for not changing plans

Most say they are not changing plans as they do not use affected areas

However, there is evidence that relatively high numbers acknowledge they have yet to plan

NB: only asked in wave 2

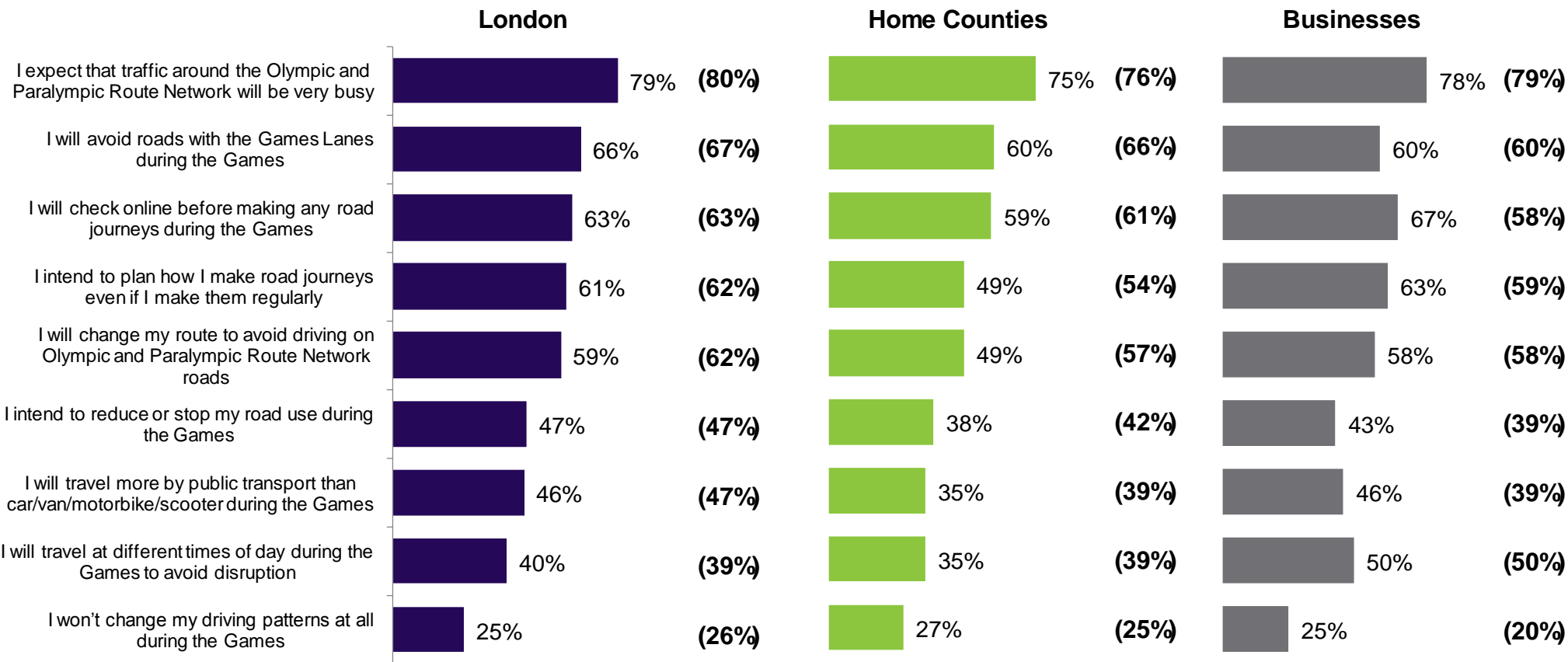


G1b You said that you don't expect to change your travel plans (much) during the Games. Why not?
All who don't expect to change much (Wave 2 - London 425, Home Counties 148, Businesses 58) WAVE ONE NOT ASKED

Planning travel during the Games

Four fifths expect traffic around the ORN/PRN to be very busy, but less will check before travel

Question related to travel by car, motorbike, scooter, van or lorry as a driver or passenger



G2 Thinking about your business travel by car, motorbike, scooter, van or lorry during the London 2012 Games are running, to what extent do you agree or disagree with the following statements?

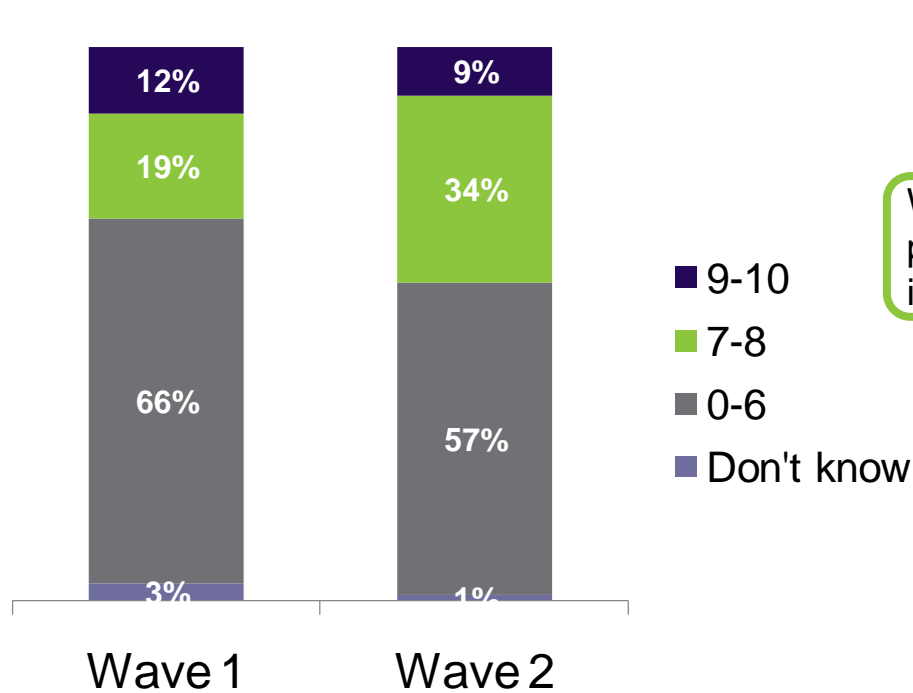
All except those that would not make journey by road

(Wave 2 - London 1,064, Home Counties 249, Businesses 140) (Wave 1 - London 1,075, Home Counties 237, Businesses 142)

Business preparedness

This wave has seen a decline in the proportion of businesses that say they have not yet thought about adapting to the changes to the road network during the Games

When asked how well prepared would you say your business is to adapt to the changes that are planned two in five give a score of at least 7 out of 10 (0 = not at all prepared, 10 = fully prepared)



Just **8%** have not thought about it yet, down from 19% in wave 1

We have not had time - due to the pressure of work - to assess the likely impact, hence our lack of preparation

Too busy doing day-to-day operations!

Not sure of the real impact until we see it

We don't feel we will be greatly affected so we haven't planned many contingencies

K1 Finally, taking everything in to account, how well prepared would you say your business is to adapt to the changes that are planned to the road network during the Games? Why do you say that?

All businesses (Wave 2 - 150) (Wave 1 - 155)

Summary

Top line summary – ORN/PRN

There is increased awareness now compared with April, however there are still substantial pockets of low understanding and uncertainty

- The majority are aware that there will be changes to the road network during the Games
- Amongst those aware, most have heard there will be lane and road closures and restrictions

ORN/PRN

- Specific awareness of the ORN is lower – although 7 in 10 Londoners and 8 in 10 businesses are aware; there is significantly less awareness though of the PRN and the specific routes covered by the network
- Very few consider themselves to have a good knowledge of the ORN/PRN less than one in five say they know at least a fair amount
- When looking at the detail of operational times and dates of the ORN/PRN few have incorrect knowledge; however there remain a large proportion that do not know
- One misconception that does appear to be more common is that you will not be able to drive on the majority of the ORN/PRN

Top line summary – Games lanes

Most Londoners and businesses are now aware of Games lanes

GAMES LANES

- As with the ORN/PRN, there is little in the way of misconceptions around aspects of the Games lanes; the main issue is the high proportion of respondents that do not know the details
- Only just over 2 in 5 from the home counties were aware of the Games lanes prior to the research
- More than half of Londoners and businesses believe that they will not be allowed to drive in Games lanes when operational
 - And most continue to believe that they will be towed or issued with a PCN for parking or driving in a Games lane

ADVERTISING AND INFORMATION

- More than two fifths of Londoners and businesses report having seen advertising relating to the ORN / PRN
 - Only a quarter of home counties residents have seen any advertising
- Awareness of getaheadofthegames.com has increased, but only around one in ten have visited the site

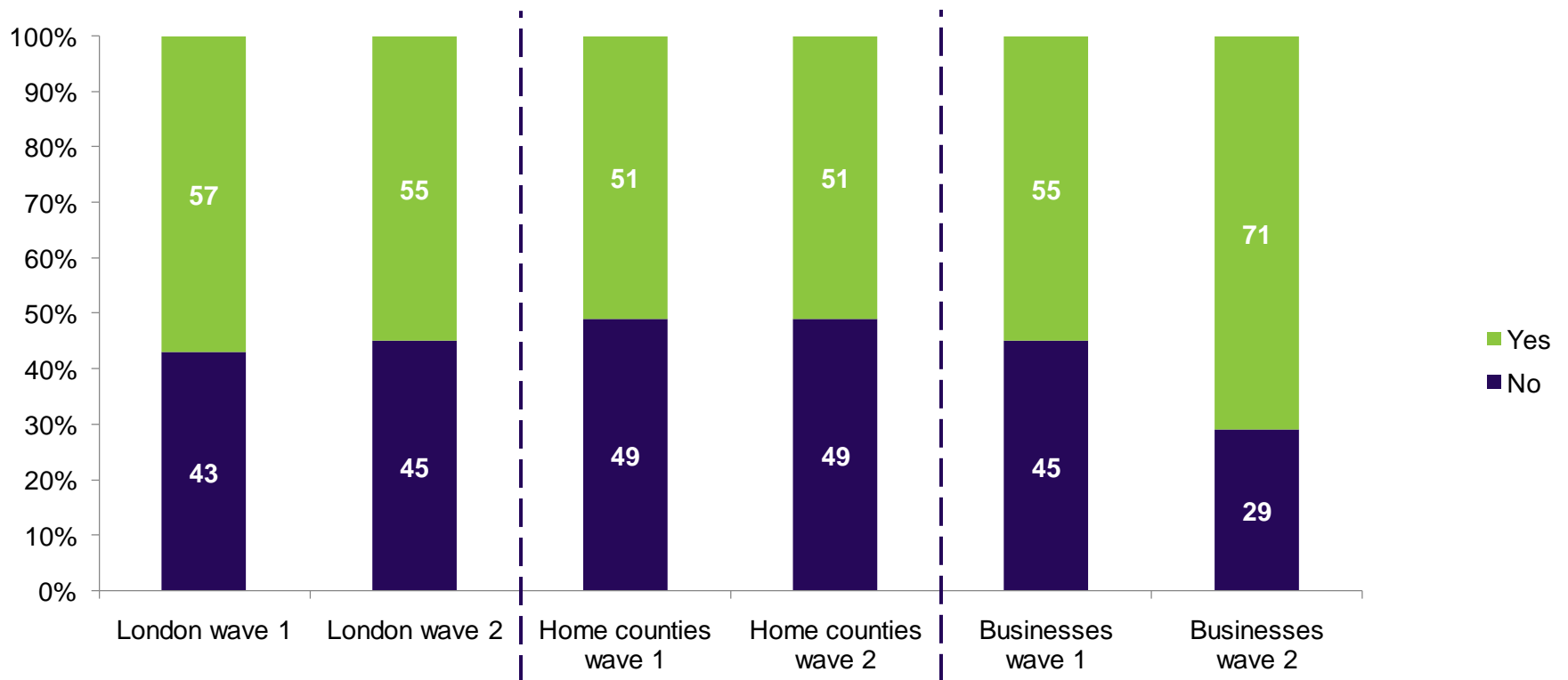
Additional slides if required

Road events

Awareness of road events

Businesses are significantly more aware of road events this wave

No change in awareness for Londoners or home counties residents



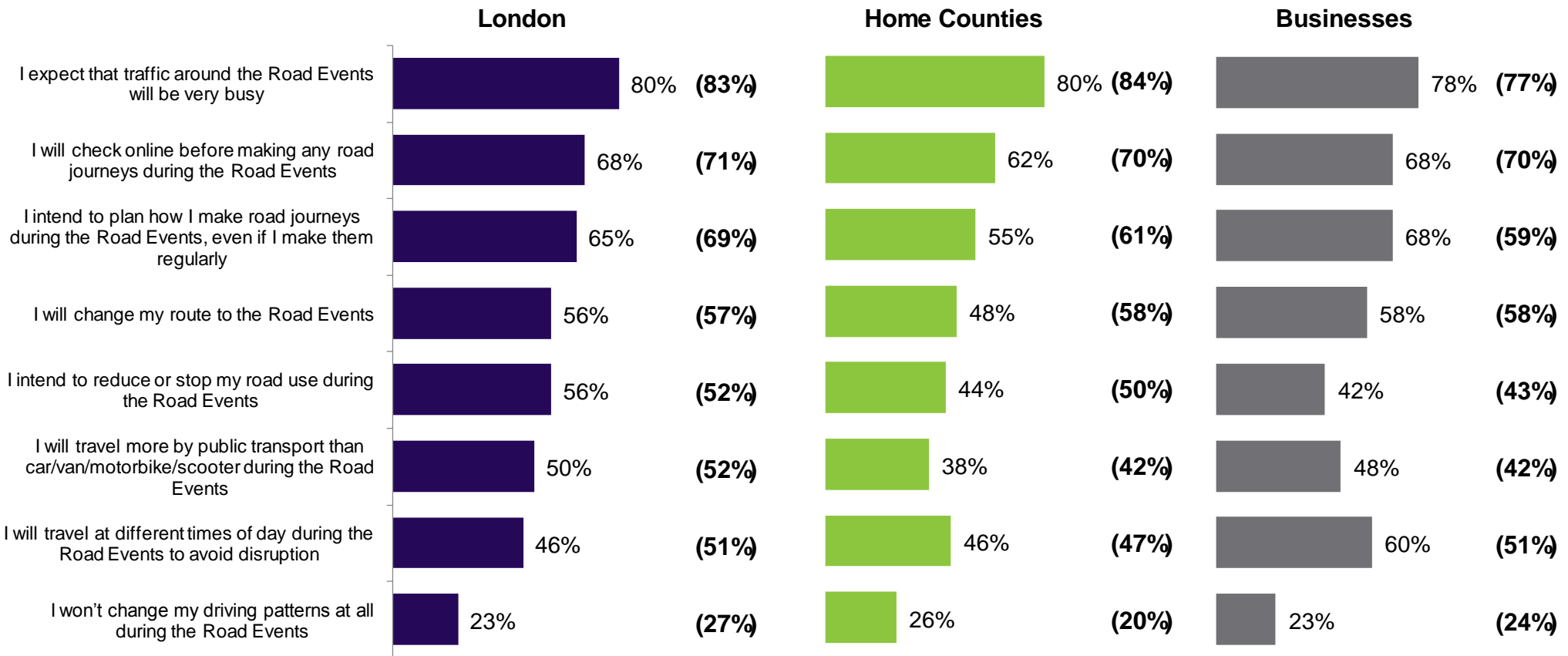
J1. As well as events at Olympic venues, some events will take place on London's streets and public spaces. Were you aware there would be Road Events before taking part in this survey?

All (Wave 2 - London 1,208, Home Counties 329, Businesses 150) (Wave 1 - London 1,205, Home Counties 300, Businesses 155)

Planning travel during road events

Seven in ten will check online before travelling during road events

A quarter still have no plans to change their driving patterns when road events are taking place



J5. Thinking specifically about when the Road Events are taking place, to what extent do you agree or disagree with the following statements?

All that are aware of road events taking place

(Wave 2 - London 569, Home Counties 109, Businesses 98) (Wave 1 - London 576, Home Counties 109, Businesses 79)

Sample

Unweighted sample profile

	Wave 1	Wave 2
Gender		
Male	699	750
Female	806	787
Age		
16-24	124	174
25-44	705	710
45-59	364	368
60-64	135	104
65+	177	181
Ethnicity		
White	1188	1184
BAME	286	315