Transport for London

Perceptions of the travel environment

09105

August 2010



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Research conducted by Synovate

1 Executive Summary

The research on which this report is based was commissioned by TfL to measure the perceptions of London residents of journey experience, noise and the urban realm. The survey findings form the basis of three Strategic Indicators monitoring the outcomes of the Mayor's Transport Strategy. These indicators are reported in the annual Travel in London report, available here:

http://www.tfl.gov.uk/corporate/about-tfl/publications/1482.aspx

The findings reported here are based on quantitative telephone interviews with 1,000 London residents conducted in June 2010. The study was previously conducted in November 2009, and this report provides comparative findings between the two studies. It is important to note that the hours of natural daylight will vary between the two studies, which may have an impact on the responses given by Londoners. The study will be repeated in June of each year.

The main findings are reported below:

Satisfaction with travel in London has improved to some extent, but is still perceived to be in need of improvement

This year Londoners gave their satisfaction with travel in the Capital a mean score rating of 66 out of 100, slightly higher than the 64 mean score given last year. This therefore implies that this is an area which is still in need of improvement, despite the increase. London's travel network is a key reason for being satisfied when travelling around the Capital, with buses (28%), the Tube (23%) and trains (18%) the most commonly cited reasons. Experiences on buses and the Tube are also the main causes of dissatisfaction when travelling around London.

Satisfaction with Londoners' most recent journey experience is fairly good, though still shows scope for improvement

Londoners gave a mean score of 72 out of 100 for the experience of their most recent journey. This is significantly higher than the level of satisfaction with overall journey experiences in the Capital. Three in ten (29%) were very satisfied (9 or 10 out of 10 on the satisfaction scale) while one in ten (10%) were dissatisfied (0-4 out of 10 on the satisfaction scale) with their experience.

The most salient factors ensuring satisfactory journeys were that their chosen mode of transport arrived on time, the roads were clear and the journey time was short. Conversely overcrowded

transport, congested roads and poor punctuality of public transport were the main causes of unsatisfactory journey experiences.

Half of Londoners feel travelling in the city remains unchanged from last year while three in ten think travel has got better

Consistent with last year, half of Londoners (47%) say that travelling in the Capital has remained unchanged in the past year, while three in ten (29%) say it has got better. The most common reason for feeling travelling has got better is the perceived improvement in bus services. A fifth (21%) say that travelling in the Capital has got worse in the past year, with the main reasons given for this being overcrowded services and delays and disruptions due to engineering work.

General noise levels are viewed as fairly good, with the majority of Londoners saying noise levels have remained unchanged from last year

Noise levels in local areas have a mean score rating of 70 out of 100, meaning they are fairly good. As expected, Londoners who give a high satisfaction rating for noise levels tend to live in quieter neighbourhoods, whilst those who give low ratings do so mainly due to traffic noise and living in a noisy area.

Two thirds (67%) of Londoners feel noise levels in their local area have remained unchanged over the last year, however there has been a significant rise in the proportion who perceive noise levels to have got worse over the last year. A fifth (21%) say noise levels have got worse, while 8% of Londoners feel they have got better. Among Londoners who say noise levels have got worse, the main reason given is increased traffic and congestion in their area.

As with general noise, scores for transport related noise are viewed as fairly good, with the majority of Londoners saying noise levels have remained unchanged from last year

Transport related noise levels are given a mean score of 71 out of 100, suggesting that Londoners perceive them to be fairly good. Those who are very satisfied with the noise levels tend to live in quieter areas or areas where they do not hear traffic noise. Those who are least satisfied tend to say this stems from the amount of traffic and congestion in their local area. As with general noise levels, there is a belief among most people that transport related noise remains unchanged from the previous year (76%), however Londoners are more likely to say transport related noise levels have got worse than better (13% vs. 7%). Traffic noise disturbs the highest proportion of London residents (61%), followed by roadworks and noise from air traffic.

Transport related noise continues to have an impact on the quality of life of Londoners

Consistent with last year, just under half (46%) of Londoners have experienced some degree of stress due to transport related noise, with 6% experiencing stress to a great extent. Those who have been affected to a great extent tend to be least satisfied with noise levels in general and transport related noise specifically.

A quarter of Londoners have their sleep disturbed by transport related noise at least once a fortnight, with 7% having their sleep disturbed on a daily basis. The majority however (58%) have not had their sleep disturbed by transport noise in the last year.

Although the quality of the streets, pavements and public spaces in their local area has improved slightly, they are still perceived as in need of improvement

Londoners give the quality of the streets, pavements and public spaces in their local area a mean score rating of 64 out of 100, marginally higher than last year's mean score of 63. Poor road surfaces and the disrepair of pavements are the main causes of dissatisfaction. This may have been exacerbated by the abnormally cold Winter of 2009/2010, which had a negative impact on the quality of roads and pavements.

Personal safety during the day and wayfinding have improved from adequate to good over the past year, however average perception scores for perceptions of many aspects of the urban realm remain below 70, and therefore are in need of improvement.

Although not significant, the mean score increase for wayfinding in local areas and personal safety when walking around during the day has meant that both mean scores are at 80 or above, meaning these are the aspects Londoners are most satisfied with in relation to the urban realm.

Despite all aspects of the urban realm improving to some extent, there are still a number of aspects which have a mean score below 70, and these are generally in need of improvement. The aspect most in need of improvement is the conditions of the streets for cycling, which remains the aspect of the urban realm Londoners are least satisfied with.

Table A			
Satisfaction with the urban realm	CSS Score 2010	CSS Score 2009	Action
The ease of finding your way around when walking in your local area	81	78	Good
Personal safety when walking about in your local area during the day	80	78	Good
Levels of graffiti and fly posting in local area are kept under control	74	72	Adequate
The ease of crossing the road safely when walking in your local area	72	70	Adequate
The condition of public spaces in your local area	72	69	Adequate
Streets and pavements in your local area are not cluttered with signs		68	Adequate
and street furniture			
Cleanliness of streets, pavements and public spaces in local area	68	65	In need of improvement
The condition of the streets in your local area for walking		64	In need of improvement
The attractiveness of streets, pavements and public spaces in your local	66	63	In need of improvement
area			
Personal Safety when walking about in your local area at night	65	61	In need of improvement
The condition of the streets in your local area for cycling	58	56	In need of improvement

 $Base: All\ respondents\ 2010\ (n=1000), 2009\ (n=1000)$ $JE21\ (1,2,3,4,5,6,7,8,9,10.11)\ Satisfaction\ with\ aspects\ of\ urban\ realm?$

2 Background and Objectives

TfL needs to measure the perception indicators in the Mayor's Transport Strategy about journey experience, noise and urban realm and understand the drivers of perceptions in this area. With this in mind, Synovate has been commissioned to conduct quantitative research with a sample of London residents to gauge peoples' views. These findings will help inform how well the Mayor's Transport Strategy is working in improving the overall quality of life of London residents.

The quality of life key indicators measured in this research are:

- Perception of London residents of their overall journey experience when travelling in London
- Perception of London residents of transport-related noise levels in their local area
- Perception of London residents of the quality of the urban realm in their local area

The research has been conducted on the TfL Regular Research Slot by means of a 30 minute telephone survey with 1,000 Londoners. The study was previously conducted in November 2009, and this report provides comparative findings between the two studies. Small corrective weights were applied to the data to ensure that it was representative of Londoners.

Interviews were conducted in the three week period from 7th and 27th June 2010 inclusive.

3 Main Findings

3.1 Customer Satisfaction scores

The key indicators in this survey are measured on a scale of 0 - 10 where 10 is extremely satisfied and 0 is extremely dissatisfied. The satisfaction rating is calculated as a mean score, and multiplied by a factor of 10. Therefore, scores are shown out of a total of 100. The table below shows the interpretation of the scores and highlights that any scores rated 69 or under suggest that the service is in need of improvement.

Table 1	
Score	Rating
Under 50	Very low/weak/poor
50-54	Low/weak/poor
55-64	Fairly/relatively/quite low/weak/poor
65-69	Fair/reasonable
70-79	Fairly/relatively/quite good
80-84	Good or fairly high
85-90	Very good or high
Excellent or very high	Excellent or very high

Throughout this report, when discussing satisfaction scores, reference will be made to the mean score followed by a more detailed discussion around satisfaction ratings. The table below show the groupings that are used to describe the various satisfaction levels.

Table 2	
Score	Satisfaction classification
10 or 9	Most satisfied
8 or 7	
6 or 5	
4, 3, 2, 1 or 0	Least satisfied

3.2 Perception of journey experience

As shown in the chart below, satisfaction with the travel experience among Londoners has slightly improved this year, rising to a mean score of 66 out of 100. Encouragingly the proportion of Londoners who are very satisfied (9 or 10 out of 10 on the satisfaction scale) with travelling in London has significantly risen this year (13% vs 10%).



Those who are very satisfied with travelling in London tend to be aged over 65, from the DE socio group and not in any form of employment. London's travel network is a key reason for the high satisfaction rating when travelling around the Capital, with the services provided by buses (28%), Tube (23%) and trains (18%) the most cited reasons for being satisfied when travelling.

Consistent with last year, frequent users of the respective services tended to cite the mode they frequently use as a reason for giving a high rating of satisfaction. This finding suggests a correlation between use of and satisfaction with mode. Overall the key reasons are:

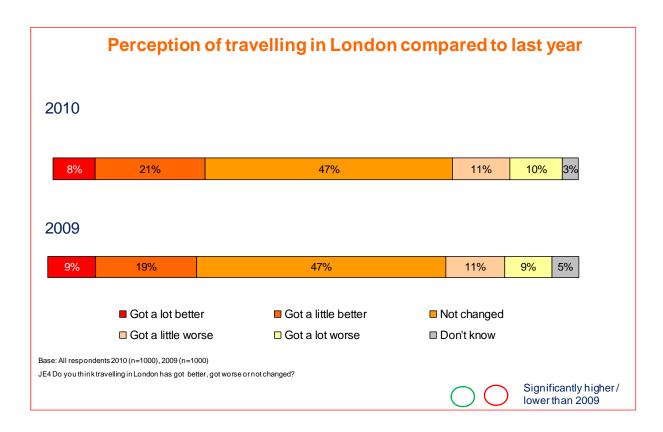
- Buses (28%)
- The Tube (23%)
- Trains (18%)
- The regularity of services (17%)
- Accessibility (6%)
- Punctuality of services (6%)
- Ease and convenience (6%)
- Speed of services (5%)

Among all Londoners, the most frequently mentioned aspects of travel in London that people are least satisfied with are buses (19%) and the Tube (19%). Interestingly, these two reasons given are also mentioned as the key reasons for a high rating.

Consistent with last year, young Londoners (aged 16-24) are significantly more likely to give low satisfaction ratings because of bus travel (37% vs. 16% of all those over 25). It is worth noting that bus use is particularly high among young Londoners, so this finding could be a driver for the lower levels of satisfaction. The key reasons for low ratings of satisfaction mentioned by 5% or more Londoners are:

- Buses (19%)
- The Tube (19%)
- Crowded /overcrowded services (17%)
- Engineering work (12%)
- Poor timelines and punctuality (10%)
- Fares and fare increases (10%)
- Traffic and congestion (10%)
- Trains (9%)
- Irregular and poor frequency of services (7%)

Just under half (47%) of Londoners feel that in the past year travelling in London has remained unchanged, consistent with last year. A third (29%) however have noticed a positive change since the last year and think that travelling has in fact got better, while a fifth (21%) think it has got worse. Young Londoners are most likely to think travelling in London has got better, 45% of 16-24 year olds say this compared to a quarter (26%) of Londoners aged over 25.



Among those who think travelling in London has got better, the main reasons for this include:

- Improvement in bus services (18%)
- More frequent services (14%)
- More timely/ punctual services (12%)
- Improved train/rail services (10%)
- Increased services/regular services (9%)
- It has improved/is getting better (7%)
- Modernisation and refurbishment (7%)
- Tubes have improved (7%)
- More convenient (5%)
- Improved reliability (5%)
- Less delays (5%)

As expected, there is correlation between perception of change and satisfaction with travelling. Those who think travelling has got worse in the last year are significantly more likely to be dissatisfied with travelling in London. Four in ten (39%) dissatisfied Londoners think travelling has got worse in the last year compared to 5% of satisfied Londoners.

Among Londoners who feel that travelling in the Capital has got worse in the last year, a quarter (24%) say this is because of overcrowded services and a fifth (21%) attribute it to delays or disruptions to services due to engineering work. The latter view is commonly shared among all types of transport users, including 33% of weekly Tube users and 28% of weekly train users.

The key reasons why Londoners think travelling in the city has got worse in the last year include:

- Overcrowded services (24%)
- Delays or disruptions to services due to engineering work (21%)
- Increased traffic and congestion (15%)
- Expensive fares and price increases (13%)
- Poor condition of roads/more roadworks (11%)

3.3 Satisfaction with most recent journey experience

This year Londoners were asked how satisfied they were with their most recent journey experience. As the chart overleaf shows, Londoners gave a mean score of 72 out of 100, indicating there is room for improvement. Three in ten (29%) were very satisfied while one in ten (10%) were dissatisfied (0-4 out of 10 on the satisfaction scale) with their experience.

Looking at those who are very satisfied with their most recent journey experience, they are significantly more likely to be very satisfied with travelling around London (in general) and think that travelling in London has got better in the last year. The most salient reasons for the high satisfaction with their most recent journey experience are;

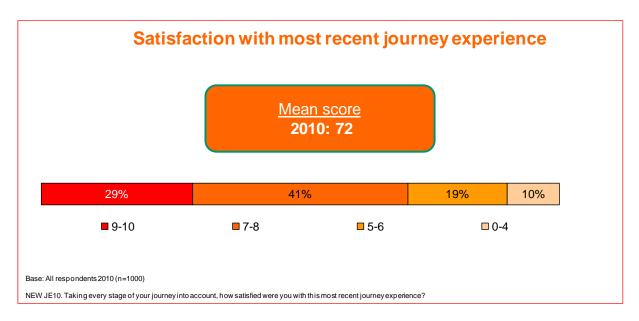
- Arrived on time (25%)
- Clear roads (12%)
- Short journey time (12%)

Conversely, those who were dissatisfied with their most recent journey experience tend to be dissatisfied with travelling around London (in general) and think that travelling in London has got worse in the last year. A third (34%) could not identify any particular reasons why their most recent journey was unsatisfactory, however other prominent reasons include;

- Overcrowded transport (11%)
- Congested roads (11%)
- Poor punctuality (9%)

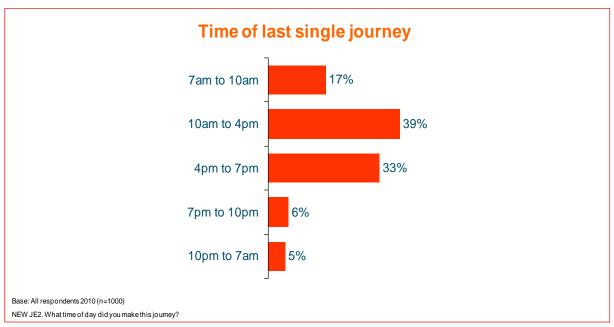
Looking at those who were very satisfied with their most recent journey experience, it appears this is influenced by the mode of transport used. Londoners whose main mode of transport for their last journey was walking are significantly more likely to be very satisfied compared to those whose main mode was the Underground, bus, train or car (49% vs. 19%, 32%, 29% and 29% respectively). Car travel has the highest dissatisfaction (15%), significantly higher than those whose main mode was bus (8%) or walking (3%).

Londoners whose journey was under 3 miles and took place at the weekend are also significantly more likely to be very satisfied with their most recent journey experience.

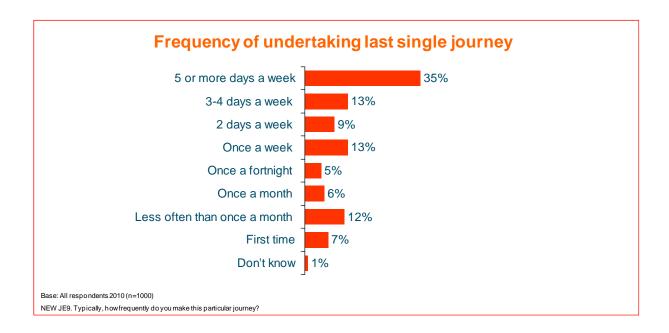


In order to ascertain the profile of typical journeys Londoners undertake, further questions were asked about their most recent journey experience. As the charts overleaf show, the most common reason for undertaking their most recent journey was for work purposes (30%), which explain why most journeys are undertaken during working hours.

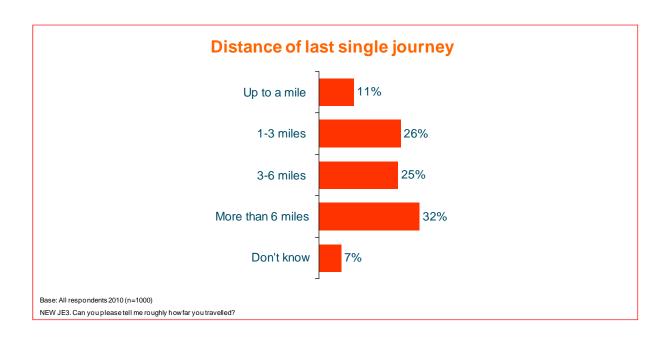




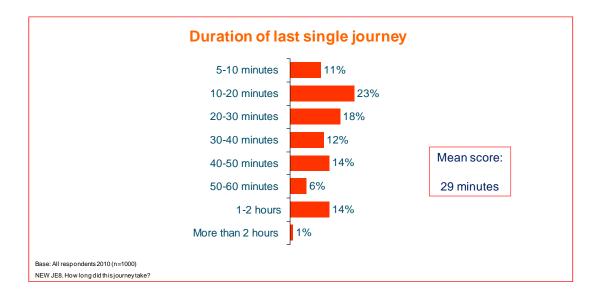
Looking at Londoners last journey experience, this journey is usually conducted on a weekly basis (70%), with a third making the journey 5 days a week or more. Just one in ten make this journey less often than once a month and for 7% of Londoners this was the first time they had undertaken this particular journey.



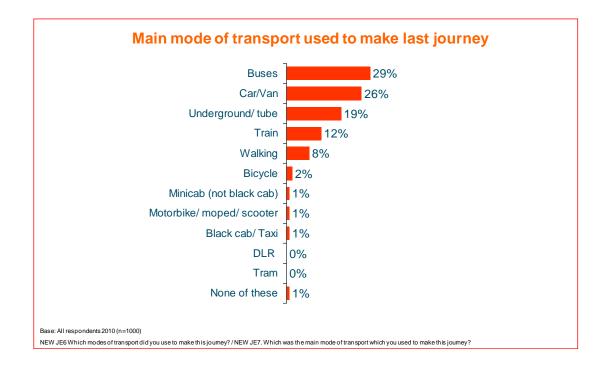
A third of journeys undertaken were over six miles from the original destination, with the majority of journeys 1-6 miles from the original destination. A tenth of journeys were under a mile.



The relatively long distance between the origin and destination helps to explain how Londoners last journey took an average of 29 minutes. One in ten journeys took less than 10 minutes, while on the other hand 14% took between 1-2 hours. It is likely that, when asked to recall the most recent journey, respondents select their most recent 'significant' journey, tending to ignore very short local walk trips such as popping out to get a sandwich. This will have the effect of increasing the average distance travelled and time taken, and of reducing the walk mode share.



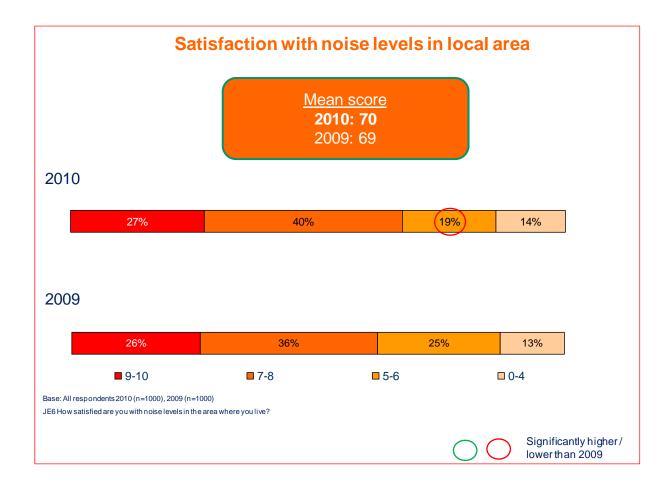
Buses (29%), Car (26%) and the Tube (19%) are the main modes of transport used by Londoners for their last journey. A fifth of Londoners aged 35-54 travelled mainly by bus, significantly lower than Londoners aged 16-24 and over 65 (52% and 43% respectively).



3.4 Perception of noise

General perception of noise

Overall, Londoners tend to be reasonably comfortable with the levels of noise in their area, consistent with last year. Londoners gave noise levels a mean score of 70 out of 100, while a quarter (27%) gave a satisfaction rating of 9-10.



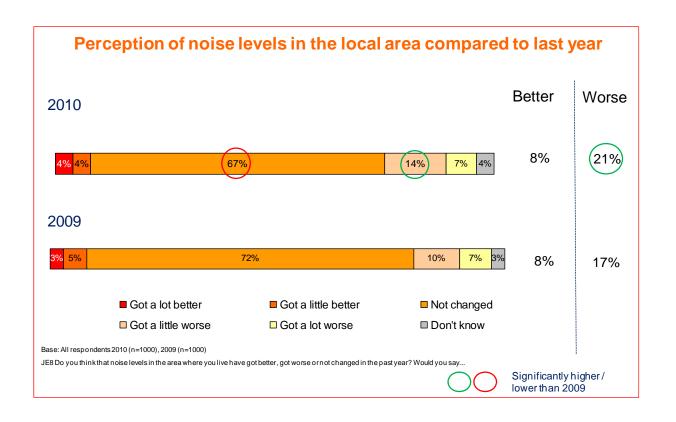
Outer Londoners are significantly more likely to be very satisfied with noise levels in their local area. A third (31%) of Outer Londoners say they are very satisfied, compared to a fifth of Inner Londoners (22%) and 16% of Central Londoners.

Londoners who give a high rating of satisfaction are by far more likely to say they live in a quiet or peaceful area than those who give a lower score. The main reason Londoners mention for high satisfaction with noise levels is that they live in a quieter area – with 44% of Londoners saying this.

Those who are least satisfied with noise are likely to say it is because of the following reasons:

- Noise from traffic (32%)
- Live in a noisy area (31%)
- Noise from air traffic (21%)
- Noise from people on the street (15%)
- Noise from emergency vehicles (12%)

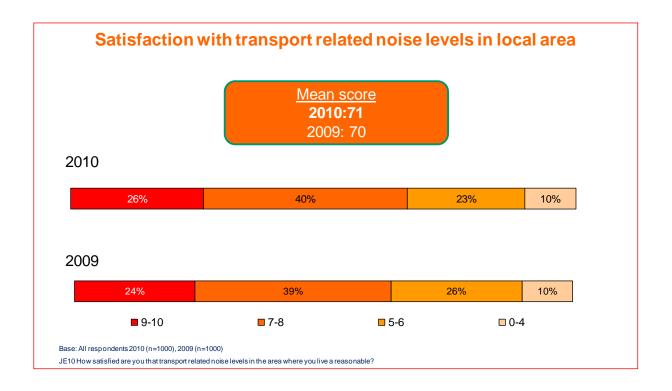
Although the majority of Londoners believe that the noise levels in their local area have remained unchanged in the past year (67%), there has been a significant rise in those who feel that noise levels have got worse. This year a fifth (21%) feel noise levels have got worse compared to 17% last year, with the most salient reason being an increase in traffic and congestion (34%). An increase in people in the area (15%) and noise from air traffic (13%) are other common aspects mentioned.



The main reasons why people think noise levels have got better are a general reduction in noise levels (24%), a reduction in anti-social behaviour / better policing (23%), and the fact that they live on a quiet road (10%). As previously mentioned, living in a quiet area is a key reason for satisfaction with noise levels.

Perception of transport related noise

Consistent with last year, Londoners are fairly positive about transport related noise in their local area. As shown in the chart below, transport related noise is given a mean score of 71 out of 100.

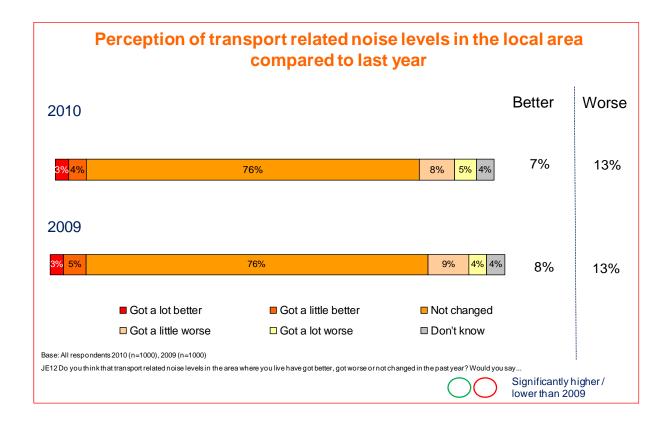


Looking at those who are very satisfied with transport noise levels, they also tend to be very satisfied with noise levels in their local area and to think that noise levels have got better in the last year.

Similarly, those who are least satisfied with transport noise levels are also likely to give a low satisfaction rating for general noise levels in their local area and tend to think noise levels have got worse in the last year. The main reasons given for a low satisfaction rating are the amount of traffic and congestion (24%) and living in a noisy area (21%).

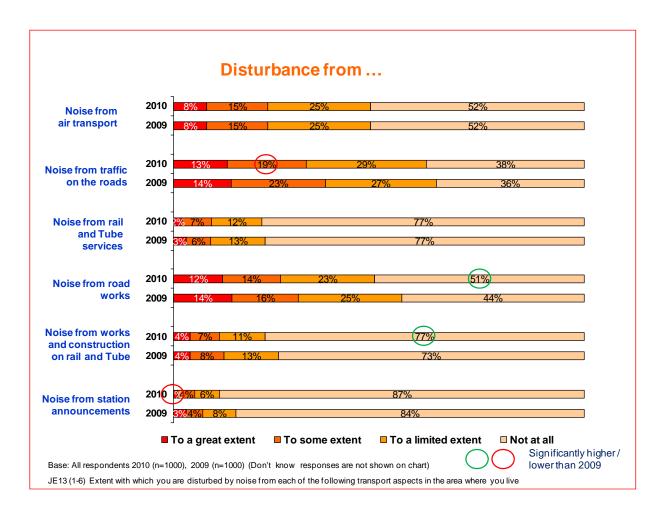
Among Londoners, three quarters (76%) think that transport related noise levels have not changed over the last year. 7% think transport related noise levels have got better, with the main reasons given for this being that there is generally less noise and that there are quieter and newer engines and buses.

Over one in ten (13%) Londoners think transport related noise levels have got worse, consistent with last year. The main reason given for this is the perceived increase in traffic and congestion.



The chart below shows the extent to which people are affected by various aspects of transport noise in the areas they live. Consistent with last year, noises related to the road are the most problematic for Londoners. Noise from **rail and Tube**, **station announcements and works and construction on rail and Tube** affect Londoners the least, with the vast majority of people saying they are not at all affected.

This year there has been a significant rise in the proportion of Londoners who say they are not at all affected by noise from roadworks and works and construction on rail and Tube.



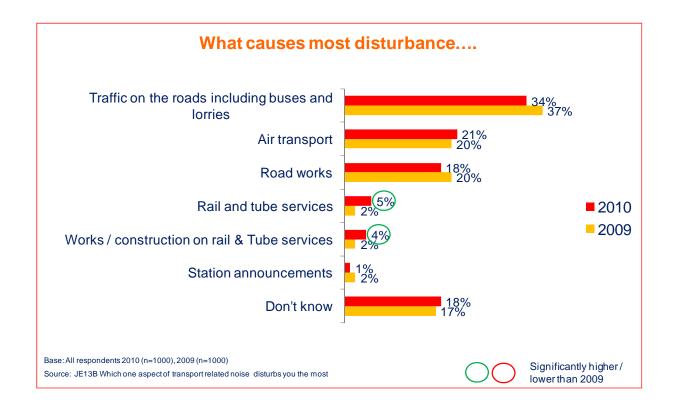
As with last year, a quarter of Londoners say they are disturbed to a great extent (8%) or to some extent (15%) by noise from **air traffic**. Those who are disturbed to a great extent are significantly more likely to give a low satisfaction rating in terms of transport related noise and general noise levels in their area. Conversely, those who are not at all disturbed are very satisfied with transport related noise specifically and general noise levels. Those who report great disturbance from air traffic they are significantly more likely to live in West London (17%) compared to Central (4%), North (2%) or East London (6%). This may be due to Heathrow Airport being located in West London.

Around a third of Londoners say noise from **traffic on the roads** disturbs them to a great extent (13%) or to some extent (19%). Just under half (47%) of those who are dissatisfied with transport related noise say they are affected to a great extent by traffic on the roads. Among those who are not at all disturbed, they are significantly more likely to feel transport related noise has got better in their local area and to live in Outer London.

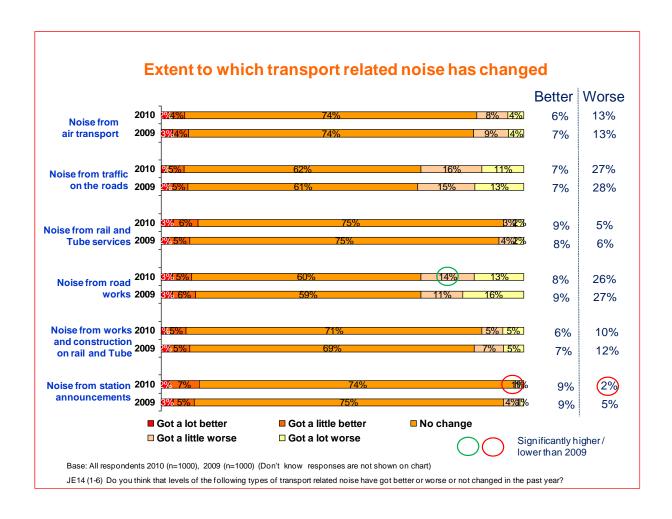
A quarter of Londoners say noise from **roadworks** disturbs them to a great extent (12%) or to some extent (14%). Among those who are disturbed from roadworks to a great extent, they are significantly more likely to reside in North London (19%) compared to South (8%), West (11%) or East (11%) London. Two thirds (68%) of those who are very satisfied with noise levels in their area say they are not at all affected by noise from roadworks, significantly higher than those who are dissatisfied with noise levels in their area (41%).

When asked which aspects of transport related noise cause the most disturbance, Londoners feel traffic on the roads affects people the most, with a third saying this (34%). Those from Inner London are significantly more likely than Outer Londoners to feel traffic on the roads affects them the most (38% vs 32%).

The slight decline in the proportion saying traffic on the roads and roadworks disturbs them the most has led to a significant rise in the number of people saying rail and Tube services (5%) and works and construction on rail and Tube services (4%) disturbs Londoners most.

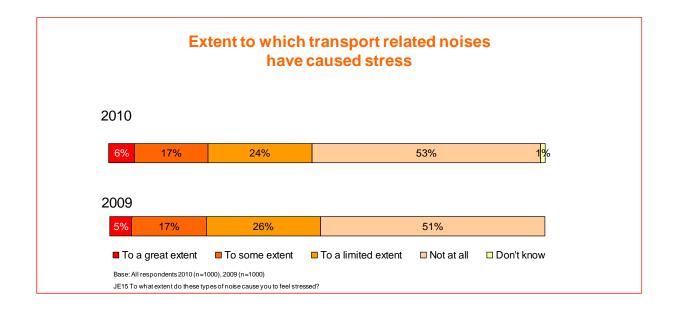


For the vast majority of Londoners, transport related noise has remained unchanged from the past year. Overall no more than 9% of Londoners say noise levels have got better. As with last year, Londoners are more likely to say transport related noise has got worse than better, with the only exception being noise from station announcements. This is most apparent when looking at the noise from traffic on the roads and roadworks, with around a quarter feeling these transport related noises have got worse.

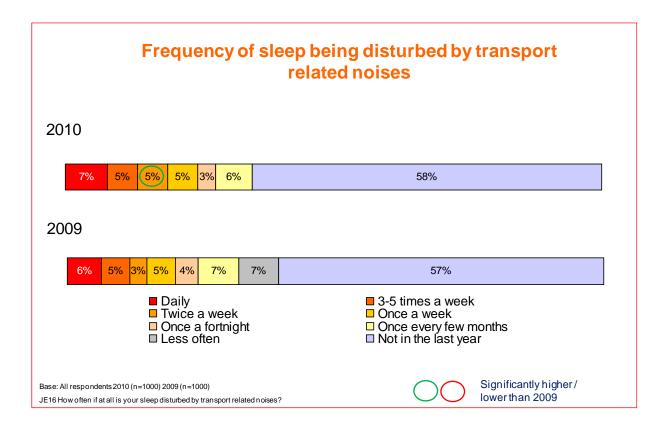


Around half of Londoners believe that transport related noise has caused them to feel stressed at times. Only a small proportion of Londoners say that transport related noise has caused them stress to a great extent (6%) while less than a fifth have been affected to some extent (17%). A quarter think they have been affected to a limited extent whilst over half have not been affected at all (53%).

Those who have been affected to a great extent tend to be least satisfied with noise levels in general and transport related noise specifically. Additionally, this group is likely to believe that most transport related noises have got worse.



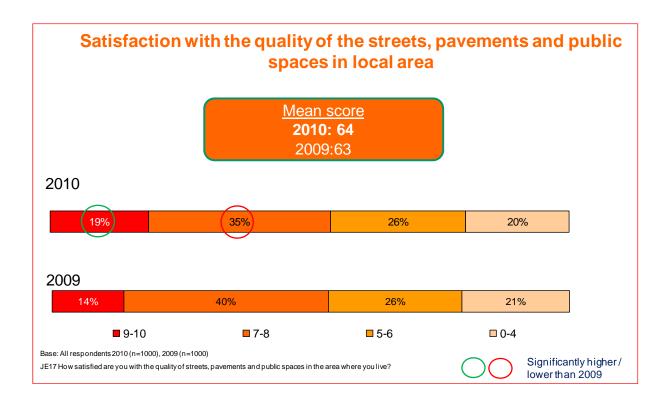
As with last year, around four in ten Londoners have had a disturbed night's sleep because of transport related noise in the last year. Around one in ten say they have a disturbed night's sleep on a weekly basis.



Among those whose sleep is disturbed by transport related noise on a daily basis, they are significantly less likely to be satisfied with transport and general related noise and believe both have got worse in the last year. Those residing in Outer London are significantly less likely to have been disturbed by transport related noise in the last year compared to those in Central London (52% vs 60%).

3.5 Perception of the urban realm

Londoners give the quality of streets, pavements and public spaces in the area where they live a mean score of 64 out of 100, similar to last year. Despite the proportion of those who are very satisfied with the quality of streets, pavements and public spaces significantly increasing this year, the overall mean score suggests improvements to the urban realm are still needed.



Among those who are satisfied with the quality of streets, pavements and public spaces, the most salient reasons for this are because:

- They are generally good (14%)
- They are regularly maintained and cleaned (12%)
- Nice open spaces (12%)
- Pavements are good, i.e. they have been repaired, replaced, re-laid or well maintained (10%)

Poor road surfaces (42%) and the disrepair of pavements (33%) are the most salient reasons why people are least satisfied with the quality of streets, pavements and public spaces in the area they live. This may have been exacerbated by the abnormally cold Winter of 2009/2010, which had a negative impact on the quality of roads and pavements. The key reasons cited include:

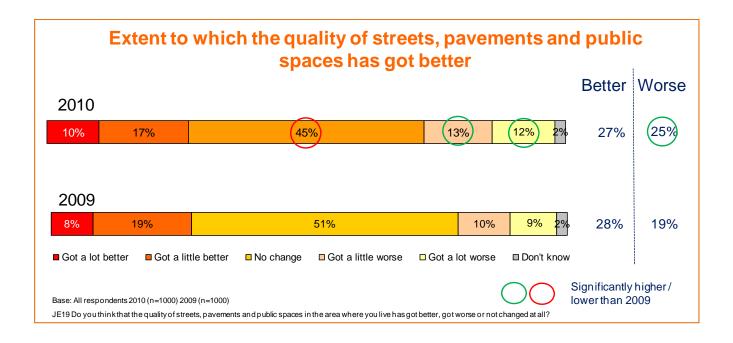
- Poor road surfaces (42%)
- Disrepair of pavements (33%)
- They are dirty / unclean (19%)
- Poorly maintained or cleaned public spaces (16%)
- Too many roadworks (8%)

Despite the satisfaction rating of the quality of streets, pavements and public spaces remaining consistent with last year, this year there has been a significant increase in the proportion who feel the quality of streets, pavements and public spaces has got worse in the past year. A quarter of Londoners feel it has got worse, while a slightly higher proportion feel it has got better (27%). The majority however still feel there has been no change in the last year.

As expected, those who say this aspect of the urban realm has got better tend to give the quality of streets, pavements and public spaces in the area that they live a high satisfaction rating. Londoners aged 16-24 are more likely to be positive about their local area, with half (51%) saying it has got better, significantly higher than all other age groups. Similarly, those from Inner London are significantly more likely to believe their area has got better than those who reside in Outer London (31% vs 25%).

The key reasons why people believe the quality of streets, pavements and public spaces in the area they live has got better are:

- The urban realm has improved or is improving (21%)
- Pavements are good, i.e. they have been repaired, replaced, re-laid or well maintained
 (21%)
- Improvements to open spaces or parks (17%)



Looking at Londoners who believe the quality of streets, pavements and public spaces in the area they live has got worse; they are more likely to be dissatisfied with the quality of streets, pavements and public spaces in the area they live. People aged 55 or over are significantly more likely to believe that the quality of streets, pavements and public spaces in the area they live is worse than a year ago than those aged under 24 (30% vs 16%).

Among Londoners who are dissatisfied with the quality of streets, pavements and public spaces, the most salient reasons for this are:

- Poor roads (26%)
- Poor or infrequent maintenance or cleaning (20%)
- They are dirty / unclean (15%)
- Pavements in disrepair (14%)
- Road works (8%)

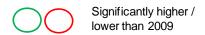
3.5.1 Satisfaction with the urban realm

Although not to a significant degree, satisfaction with all of the five aspects of the urban realm below has increased slightly since last year. However all aspects are given a mean score below 80, thus suggesting that to an extent all these aspects are in some need of improvement.

Satisfaction with the urban realm	CSS Score 2010	CSS Score 2009
Levels of graffiti and fly posting in local area are kept under control	74	72
The condition of public spaces in your local area	72	69
Streets and pavements in your local area are not cluttered with signs and street furniture	70	68
Cleanliness of streets, pavements and public spaces in local area	68	65
The attractiveness of streets, pavements and public spaces in your local area	66	63

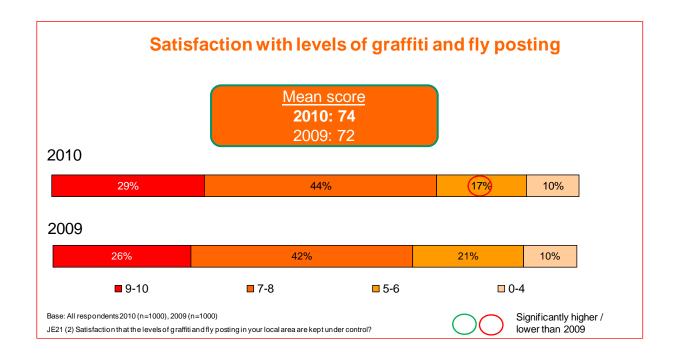
Base: All respondents 2010 (n=1000), 2009 (n=1000)

JE21 (1,2,3,4,7) Satisfaction with aspects of urban realm?



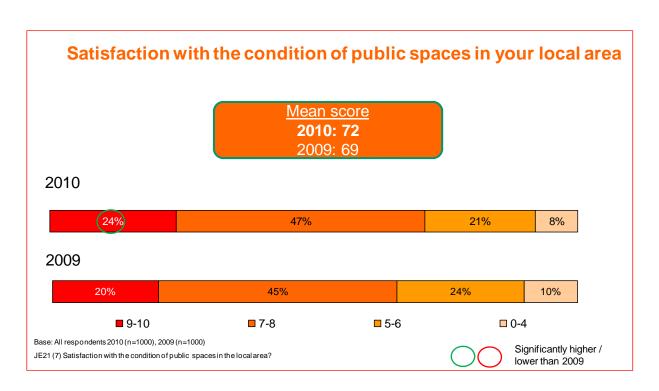
Graffiti and fly posting

The levels of graffiti and fly posting in Londoners' local areas continues to be perceived as being kept under control. This aspect of the urban realm received the highest mean score of 74 out of 100. This finding suggests that overall, Londoners do not perceive graffiti and fly posting as posing a major problem in their local area.



The condition of public spaces in local area

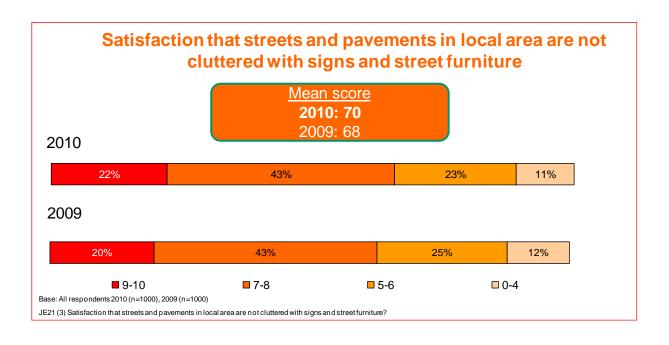
The condition of public spaces in Londoners' local areas is given a mean score of 72 out of 100. This slight increase since last year can be attributed to the proportion of Londoners who say they are very satisfied with the condition of public spaces significantly increasing this year (24% vs. 20%). Those who are satisfied with the condition of the public spaces in their local area are also likely to be very satisfied with the quality of streets, pavements and public spaces in the area they live and tend to believe that this has got better in the last year. As expected, Londoners who are least satisfied with the public spaces in their local area are likely to be least satisfied with the quality of streets, pavements and public spaces and tend to think they have got worse in the last year. Those from BAME backgrounds are significantly more likely to be dissatisfied than white Londoners (11% vs. 6%) and those aged 55-64 (11%) are significantly more likely to be dissatisfied than those aged 16-24 (6%).



Streets and pavements in local area are not cluttered with signs and street furniture

The streets and pavements in Londoners local areas are given a mean score of 70 out of 100 for the level of clutter from signs and street furniture. As expected, those who are very satisfied tend to be also very satisfied with the quality of streets, pavements and public spaces in the area they live and tend to believe that this has got better in the last year. Those aged 16-24 are more likely to be satisfied than older Londoners (59% vs.44%) and Outer Londoners are significantly more likely to be satisfied than Inner Londoners (49% vs. 42%).

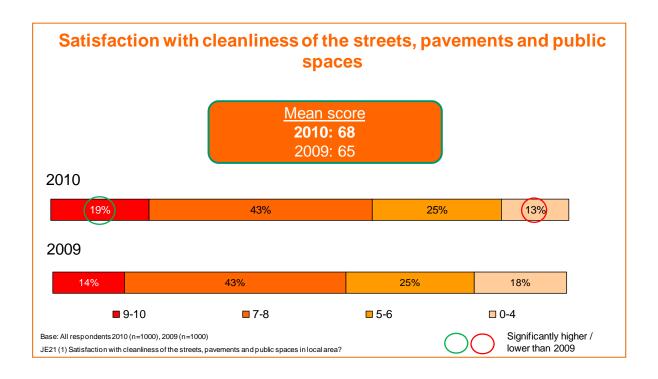
Those who give a low satisfaction rating for the level of clutter from signs and street furniture on their streets and pavements tend to also give a low rating for the quality of streets, pavements and public spaces in the area they live and tend to believe that this has got worse in the last year.



Cleanliness of streets, pavements and public spaces

The cleanliness of streets, pavements, and public spaces in Londoners local areas is given a mean score of 68 out of 100, suggesting this to be an area in need of improvement. This mean score is slightly higher than last year (65) and this slight increase can be attributed to the proportion of Londoners who say they are very satisfied with the cleanliness of streets, pavements, and public spaces significantly increasing this year (19% vs. 14%). Those very satisfied with the cleanliness of streets, pavements and public spaces also tend to be very satisfied with the quality of streets, pavements and public spaces in the area they live and to believe that this has got better in the last year. Consistent with last year, satisfaction with the cleanliness of streets, pavements, and public spaces is higher among those in the DE socioeconomic group than those in the AB group (47% vs. 33%).

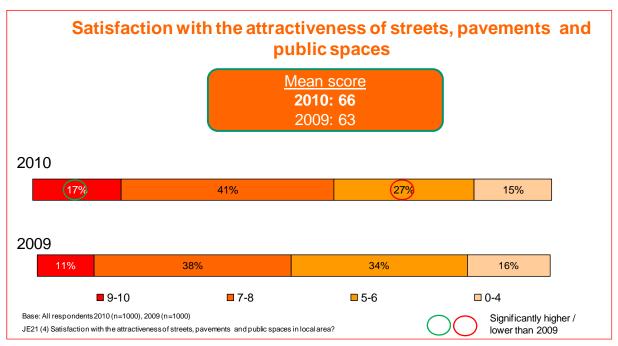
Those who are least satisfied with cleanliness in their local area are also likely to give a low rating for satisfaction with the quality of streets, pavements and public spaces in the area they live, and to believe that this has got worse in the last year.



The attractiveness of streets, pavements and public spaces

Despite the slight improvement since last year, the attractiveness of streets, pavements and public spaces in Londoners' local areas remains fairly low with a mean score of 66 out of 100, a slight increase since last year's score of 63 out of 100. This slight increase can be attributed to the proportion of Londoners who say they are very satisfied with the attractiveness of streets, pavements and public spaces significantly increasing this year (17% vs. 11%). Those who are very satisfied with the attractiveness tend to be very satisfied with the quality of streets, pavements and public spaces in the area they live and tend to believe that this has got better in the last year. Those from East (20%) and West (18%) London are significantly more likely than those from North London (9%) to be very satisfied with the attractiveness of streets, pavements and public spaces.

Those who are least satisfied tend to be also least satisfied with the quality of streets, pavements and public spaces in the area they live and tend to believe that this has got worse in the last year.



3.5.2 Satisfaction with Conditions for walking and cycling

Despite the slight increase in mean scores since last year, the ratings for street conditions for walking and cycling both remain below 70, indicating that these are both in need of some improvement.

Satisfaction with	Rating 2010	Rating 2009
The condition of the streets in your local area for walking	67	64
The condition of the streets in your local area for cycling	58	56

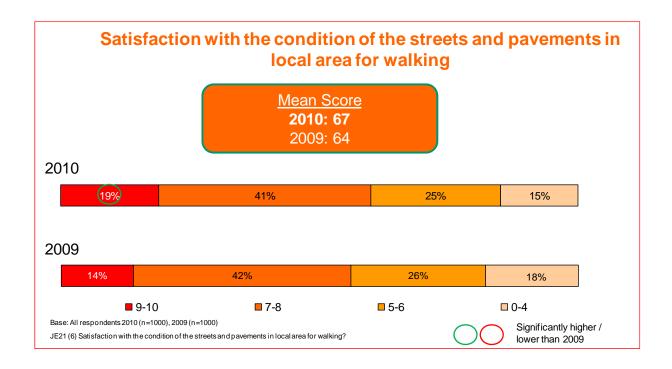
Base: All respondents 2010 (n=1000), 2009 (n=1000)

JE21 (5,6) Satisfaction with conditions for cycling and walking?

The condition of the streets in your local area for walking

The condition of the street in local areas for walking is given a mean score of 67 out of 100, a slight improvement since last year. Despite the increase this score still suggests that this aspect of the urban realm can be improved. Frequent walkers however are no more likely to be satisfied with the condition of the street in local areas for walking than other users of transport modes. In line with other measures, those who are very satisfied tend to be also very satisfied with the quality of streets, pavements and public spaces in the area they live and tend to believe that this has got better in the last year. Young Londoners aged 16-24 (53%) are more likely than those who are over 25 (39%) to be satisfied with the condition of the streets for walking.

Again those who are least satisfied tend to be also least satisfied with the quality of streets, pavements and public spaces in the area they live and tend to believe that this has got worse in the last year.

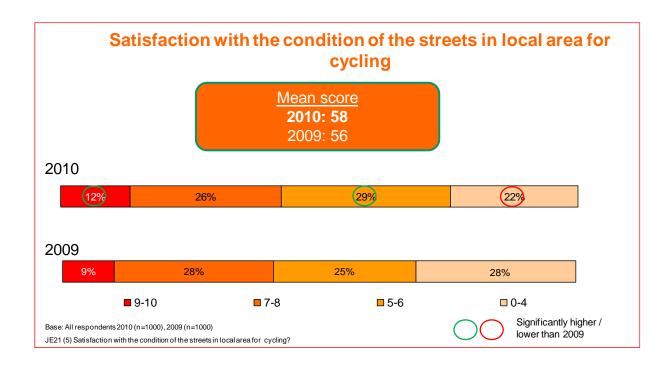


The condition of the streets in your local area for cycling

As with last year, the condition of the streets in Londoners' local area for cycling is given the lowest mean score among aspects of the urban realm, scoring 58 out of 100. Again, those who are very satisfied are also likely to be very satisfied with the quality of streets, pavements and public spaces in the area they live and tend to believe that this has got better in the last year.

Interestingly, those who cycle on a weekly basis are significantly less likely to be satisfied with the ratings for street conditions for cycling compared to those who do not cycle on a weekly basis (17% vs. 25%). This finding suggests that regular cyclists who use the streets for this purpose are most likely to feel improvements are needed to improve the street area for cycling.

As with the condition of streets for walking, those aged 16-24 are more likely to be satisfied with the condition of their local roads compared to those over 25 (36% vs. 23%). People who are least satisfied are most likely to be also least satisfied with the quality of streets, pavements and public spaces in the area they live and tend to believe that this has got worse in the last year. Those from Inner London are significantly more likely than Outer Londoners to be dissatisfied with the condition of streets for cycling (27% vs. 19%). Similarly, those in AB socio-economic groups are more likely to be dissatisfied than those in the DE group (25% vs. 16%). It is however worth noting that more cyclists fall into the AB group so they are more likely to have experience of using the roads for cycling.



3.5.3 Safety in local area

Consistent with last year, Londoners are significantly more likely to feel safer during the day than at night. This finding is in line with the TfL Safety and Security research findings which shows that people feel safer walking in their local area during the day and less so after dark.

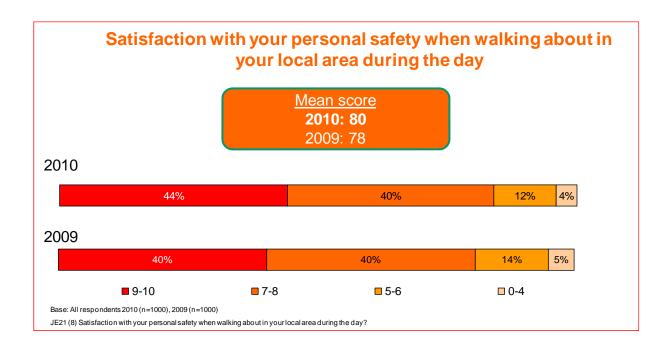
It is important to note that the hours of natural daylight will vary between the time of fieldwork in 2009 (November) and 2010 (June), which may have an impact on the responses given by Londoners.

Satisfaction with	Rating 2010	Rating 2009
Personal safety when walking about in your local area	80	78
during the day		
Personal Safety when walking about in your local area at	65	61
night		

Base: All respondents 2010 (n=1000), 2009 (n=1000) JE21 (8, 9) Satisfaction with safety?

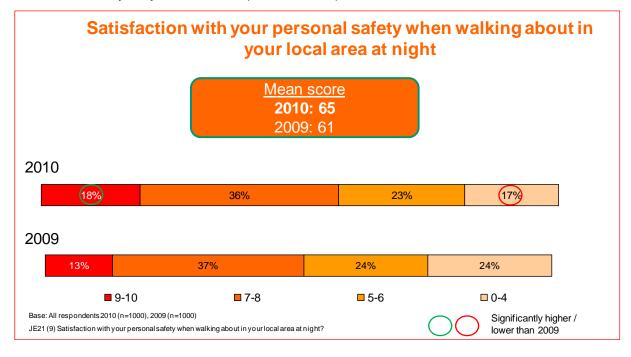
Personal Safety when walking about in your local area during the day

The mean score among Londoners regarding their personal safety when walking about in their local area during the day has risen slightly this year and now has a mean score rating of 80 out of 100, which can be described as good / fairly high. Londoners residing in South London have the highest satisfaction rating (79%), significantly higher than those from North (69%), East (68%) and West London (67%).



Personal Safety when walking about in your local area at night

There has been a slight increase in the mean score regarding Londoners' perceived personal safety when walking about in their local areas at night, rising to 65 out of 100, however this still highlights that there is need for improvement. Men are more likely than women to say they are satisfied (41% vs. 31%), while those without a disability are also more likely than disabled Londoners to say they are satisfied (37% vs. 26%).



3.5.4 Wayfinding and road safety

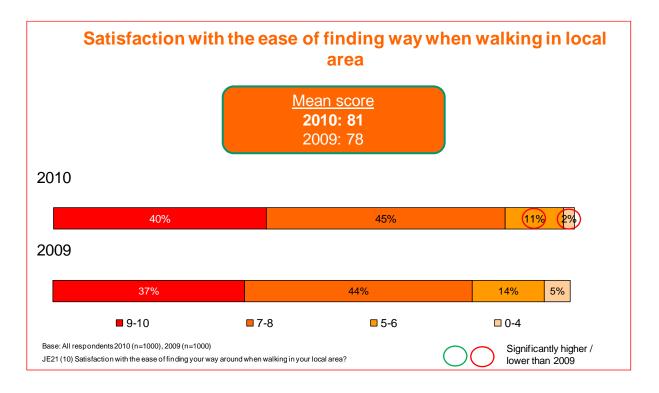
As with last year, Londoners appear confident about their wayfinding abilities when walking in their local areas. Similarly the ease of crossing the road safely is viewed as reasonable.

Satisfaction with	Rating 2010	Rating 2009
The ease of finding your way around when walking in your	81	78
local area		
The ease of crossing the road safely when walking in your	72	70
local area		

Base: All respondents 2010 (n=1000), 2009 (n=1000) JE21 (10, 11) Satisfaction with safety?

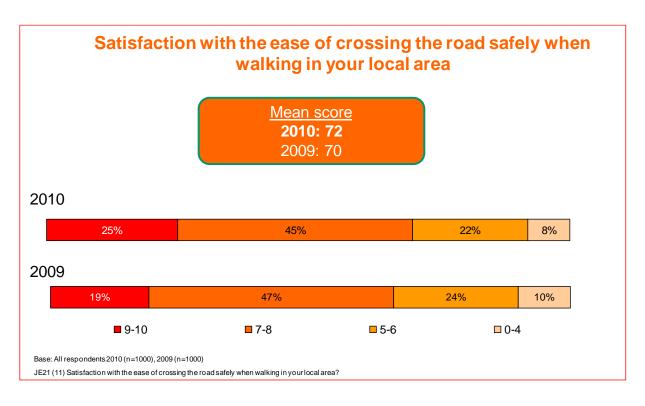
The ease of finding your way around when walking in your local area

Londoners give finding their way when walking around their local area a mean score rating of 81 out of 100 which is good / fairly high. This year the mean score has risen slightly, this may be as a result of the Legible London plinths around the Capital which are designed to improve wayfinding. Those who have a disability are significantly more likely to be dissatisfied with wayfinding in their local area compared to those with non-disabled Londoners (9% vs. 2%).

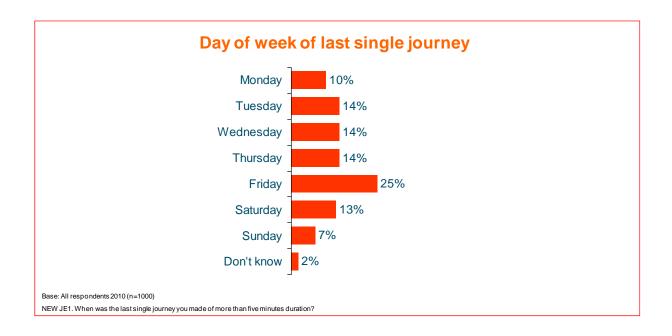


The ease of crossing the road safely when walking in your local area

Londoners give the ease of crossing the road safely when walking in their local area a mean score rating of 72 out of 100, implying that Londoners perceive this aspect of road safety as fairly good. Again those who are very satisfied tend to be also very satisfied with the quality of streets, pavements and public spaces in the area they live and tend to believe that they have got better in the last year. Additionally they are significantly more likely to feel that traffic on the road has got better in the last year. Those who are satisfied tend to be in the DE socio-economic group than AB (59% vs. 43%).



4 Appendix



Sample profile

	%
Base: 1,000	
Gender	
Male	49
Female	51
Age	
16-24	15
25-34	24
35-44	20
45-54	14
55-64	11
65+	16
Borough of residence	
Inner London	39
Outer London	61
Ethnicity	
White	69
BAME	32
Employment status	
Working full-time	48
Working part-time	12
Not working	41
Disability	
Yes	9
No	91

Interviews were conducted with the householder with the next birthday. All interviews were conducted by fully trained Synovate interviewers.

5 Core questionnaire

ASK ALL

Journey experience

I'd like to ask you some questions about travelling in London.

JE1 Firstly, Taking everything into account, how satisfied are you with travelling in London? Please give a mark out of 10 where 10 means extremely satisfied and 0 means you are extremely dissatisfied

10 – Extremely Satisfied	
9	
8	
7	
6	
5	
4	
3	
2	
1	
0 – Extremely Dissatisfie	C
(Don't know)	

ASK ALL

JE2 What aspects of travelling in London are you most satisfied with?

Open ended question – PROBE FULLY FOR A DETAILED UNDERSTANDING OF THE ASPECTS OF TRAVELLING IN LONDON THAT ARE MOST SATISFACTORY

ASK ALL

JE3 What aspects of travelling in London are you least satisfied with?

Open ended question – PROBE FULLY FOR A DETAILED UNDERSTANDING OF THE ASPECTS OF TRAVELLING IN LONDON THAT ARE LEAST SATISFACTORY

JE4 Do you think that travelling in London has got better, got worse or not changed in the past year? Would you say....READ OUT [SINGLE CODE]

- 1 Got a lot better
- 2 Got a little better
- 3 Not changed
- 4 Got a little worse
- 5 Got a lot worse
- 6 (Don't know)

JE5 Why do you say this? To be put only to those who think that travelling has got better (codes 1 and 2 at JE4) or worsened (codes 4 and 5 at JE4). OTHERS GO TO JE6.

Open ended question

PROBE FULLY FOR AS MUCH INFORMATION AS POSSIBLE ON WHAT HAS IMPROVED OR WORSENED

ASK ALL

NEW JE1 I'd like if I may to ask you now about the last single journey you made of more than five minutes duration. This might be walking or by car or by public transport or a combination of means of travel.

When did you make this journey?

DO NOT READ OUT

- 1. Today
- 2. Yesterday
- 3. Monday
- 4. Tuesday
- 5. Wednesday
- 6. Thursday
- 7. Friday
- 8. Saturday
- 9. Sunday
- **10.** (Don't know)

INTERVIEWER NOTE: IF 1. TODAY OR 2.YESTERDAY, ALSO RECORD DAY BELOW.

- 1.
- 2.
- **3.** Monday
- 4. Tuesday5. Wednesday6. Thursday7. Friday

- Saturday
 Sunday
- 10.

ASK ALL

NEW JE2 What time of day did you make this journey?

PROMPT TO PRE-CODES

- 1. 7am to 10am
- 10am to 4pm
 4pm to 7pm
 7pm to 10pm
 10pm to 7am

- 6. (Don't know)

NEW JE3 Can you please tell me roughly how far you travelled?

READ OUT

- 1. Up to a mile

- 2. 1-3 miles
 3. 3-6 miles
 4. More than 6 miles
- **5.** (Don't know)

NEW JE4 What was the purpose of being at the location you travelled from?

DO NOT READ OUT

Home	1
Work-Usual workplace	2
Work-Delivery/loading	3
Work – Other	4
Entertainment/Recreation	5
Participate in Sport	6
Visit friends/ relatives at home	7
Other Social	8
Shopping – Food	9
Shopping – Other	10
Personal business/use services.	11
Health/ medical visit	12
Education.	13
Hotel/holiday home	14
Drop off/pick up -work	15
Drop off/pick up school/college	16
Drop off/pick up-health visit	17
Drop off/pick up other	18
Worship	19
Leisure Trip.	20
Other (write in)	21

NEW JE5 Where did you travel to?

DO NOT READ OUT

Home 1 Other (write in) 2

INTERVIEWER NOTE: PLEASE CLARIFY THAT THE RESPONDENT IS TALKING ABOUT A SINGLE JOURNEY. HOME TO HOME JOURNEYS ARE ONLY ACCEPTABLE WHEN NOT TO A DEFINED PLACE, I.E. WALKING THE DOG, GOING FOR A WALK ETC.

ASK ALL

NEW JE6 Which modes of transport did you use to make this journey?

DO NOT READ OUT

- 6. Buses
- 7. Underground/tube
- 8. DLR (Docklands Light Railway)
- 9. Train
- 10. Car/Van
- 11. Motorbike/ moped/ scooter
- 12. Bicycle
- 13. Black cab/ Taxi
- 14. Minicab (not black cab)
- **15.** Tram
- 16. Walking
- **17.** (None of these)

ASK THOSE WHO GAVE MORE THAN ONE ANSWER AT JE6

NEW JE7 Which was the <u>main</u> mode of transport which you used to make this journey? PROBE: THE MAIN MODE IS THE ONE ON WHICH YOU COVERED THE GREATEST DISTANCE.

DO NOT READ OUT

- 1. Buses
- 2. Underground/ tube
- 3. DLR (Docklands Light Railway)
- 4. Train
- 5. Car/Van
- 6. Motorbike/ moped/ scooter
- 7. Bicycle
- 8. Black cab/ Taxi
- 9. Minicab (not black cab)
- **10.** Tram
- 11. Walking
- 12. (None of these)

NEW JE8 How long did this journey take?

PROMPT TO PRE-CODES

- **1.** 5-10 minutes
- 10-20 minutes
 20-30 minutes
- 4. 30-40 minutes
- **5.** 40-50 minutes
- 6. 50-60 minutes
- 7. 1-2 hours
- 8. More than 2 hours
- 9. (Don't know)

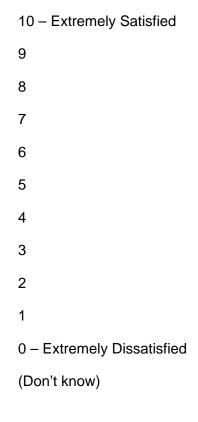
ASK ALL

NEW JE9 Typically, how frequently do you make this particular journey?

INTERVIEWER NOTE: IF RESPONDENT SAYS IT VARIES ASK HOW OFTEN THEY WOULD USE THE MAJORITY OF THE TIME OVER THE COURSE OF A YEAR **PROBE AS PER PRECODES**

- 1. 5 or more days a week
- 2. 3-4 days a week
- 3. 2 days a week
- 4. Once a week
- 5. Once a fortnight
- 6. Once a month
- 7. Less often than once a month
- 8. First time
- 9. (Don't know)

NEW JE10 Taking every stage of your journey into account, how satisfied were you with this most recent journey experience? Please give a mark out of 10 where 10 means extremely satisfied and 0 means you are extremely dissatisfied



ASK ALL

NEW JE11 What aspects of this most recent journey experience were you most satisfied with?

Open ended question – PROBE FULLY FOR A DETAILED UNDERSTANDING OF WHAT POSITIVES CONTRIBUTED TO THEIR ANSWER

ASK ALL

NEW JE12 What aspects of this most recent journey experience were you least satisfied with?

Open ended question – PROBE FULLY FOR A DETAILED UNDERSTANDING OF WHAT NEGATIVES CONTRIBUTED TO THEIR ANSWER

Thinking now about noise in the area where you live.

JE6 Using a scale of 0 to 10 where 10 is 'extremely satisfied' and 0 is 'extremely dissatisfied', please tell us how satisfied you are that noise levels in the area where you live are reasonable?



ASK ALL

JE7 Why do you say this?

Open ended question – PROBE FULLY FOR A DETAILED UNDERSTANDING OF THE POSITIVES AND NEGATIVES WHICH CONTRIBUTED TO THEIR ANSWER

ASK ALL

JE8 Do you think that noise levels in the area where you live have *got better, got worse* or not changed in the past year? Would you say....READ OUT [SINGLE CODE]

- 1 Got a lot better
- 2 Got a little better
- 3 Not changed
- 4 Got a little worse
- 5 Got a lot worse
- 6 (Don't know)

JE9 Why do you say this? To be put only to those who think that noise levels have got better (codes 1 and 2 at JE8) or worsened (codes 4 and 5 at JE8). OTHERS GO TO JE10.

Open ended question – PROBE FULLY FOR AS MUCH INFORMATION AS POSSIBLE ON WHAT HAS IMPROVED OR WORSENED

ASK ALL

JE10 Thinking specifically now about transport related noise, and again using a scale of 0 to 10 where 10 is 'extremely satisfied' and 0 is 'extremely dissatisfied', please tell us how satisfied you are that transport related noise levels in the area where you live are reasonable?

10 – Extremely Satisfied
9
8
7
6
5
4
3
2
1
0 - Extremely Dissatisfied
(Don't know)

JE11 Why do you say this?

Open ended question – PROBE FULLY FOR A DETAILED UNDERSTANDING OF THE POSITIVES AND NEGATIVES WHICH CONTRIBUTED TO THEIR ANSWER

ASK ALL

JE12 Do you think that transport related noise levels in the area where you live have *got better, got w*orse or not changed in the past year? Would you....READ OUT [SINGLE CODE]

- 1 Got a lot better
- 2 Got a little better
- 3 No change
- 4 Got a little worse
- 5 Got a lot worse
- 6 (Don't know)

JEX Why do you say this? To be put only to those who think that travelling has got better (codes 1 and 2 at JEX) or worsened (codes 4 and 5 at JEX). OTHERS GO TO JEX.

Open ended question_PROBE FULLY FOR AS MUCH INFORMATION AS POSSIBLE ON WHAT HAS IMPROVED OR WORSENED

ASK ALL

JE13 To what extent are you disturbed by noise from each of the following transport aspects in the area where you live?

So firstly, / And what about XXX [INSERT STATEMENT - RANDOMISE ORDER] (To what extent are you disturbed by noise in the area where you live?) Would you say....

[Answer options: To a great extent, To some extent, To a limited extent, Not at all, (Don't know)]

Air transport

Traffic on the roads including buses and lorries

Rail and tube services

Road works

Works and construction on rail and tube services

Station announcements

- 1 To a great extent
- 2 To some extent
- 3 To a limited extent
- 4 Not at all
- 5 (Don't know)

SINGLE CODE Which one aspect of transport related noise disturbs you most?

- 1.Air transport
- 2. Traffic on the roads including buses and lorries
- 3. Rail and tube services
- 4. Road works
- 5. Works and construction on rail and tube services
- 6. Station announcements
- 7. (Don't know)

ASK ALL

JE14 Do you think that levels of the following types of transport related noise have got better or worse or not changed in the past year?

So firstly, / And what about XXX [INSERT STATEMENT - RANDOMISE ORDER] (Do you think that level of noise has got better or worse or not changed in the past year?) Would you say....

[Answer options: Got a lot better, Got a little better, No change, Got a little worse or Got a lot worse (Don't know)]

Air transport

Traffic on the roads including buses and lorries

Rail and tube services

Road works

Works and construction on rail and tube services

Station announcements

- 1 Got a lot better
- 2 Got a little better
- 3 No change
- 4 Got a little worse
- 5 Got a lot worse
- 6 (Don't know)

JE15 Taking into account all these types of transport related noise that we have been looking at, to what extent do these types of noise cause you to feel stressed? Would youREAD OUT [SINGLE CODE]

- 1 To a great extent
- 2 To some extent
- 3 To a limited extent
- 4 Not at all
- 5 (Don't know)

ASK ALL

JE16 Again, taking into account all these types of transport related noise that we have been looking at, how often, if at all, do they disturb your sleep? DO NOT READ OUT – PROBE AS PER PRE-CODES

- 1 Daily
- 2 3-5 times a week
- 3 Twice a week
- 4 Once a week
- 5 Once a fortnight
- 6 Once every few months
- 7 Less often
- 8 Not in the last year
- 9 (Don't know)

Continuing to think about the area in which you live.

JE17 Overall taking everything into account, how satisfied are you with the quality of streets, pavements and public spaces in the area where you live? Please give a mark out of 10 where 10 means extremely satisfied and 0 means you are extremely dissatisfied

10 – Extremely Satisfied
9
8
7
6
5
4
3
2
1
0 – Extremely Dissatisfied
(Don't know)

JE 18 Why do you say this?

Open question. PROBE FULLY FOR A DETAILED UNDERSTANDING OF THE POSITIVES AND NEGATIVES WHICH CONTRIBUTED TO THEIR ANSWER

ASK ALL

JE19 Do you think that the quality of streets, pavements and public spaces in the area where you live has *got better, got w*orse or not changed in the past year? Would you say....READ OUT [SINGLE CODE]

- 1 Got a lot better
- 2 Got a little better
- 3 No change
- 4 Got a little worse
- 5 Got a lot worse
- 6 (Don't know)

JE20 Why do you say this? To be put only to those who think that the quality of streets, pavements and public spaces has got better (CODES 1 & 2 at JE19) or worsened CODES 4 & 5 at JE19). OTHERS SKIP TP JE21

Open ended question – PROBE FULLY PROBE FULLY FOR AS MUCH INFORMATION AS POSSIBLE ON WHAT HAS IMPROVED OR WORSENED

JE21 I am now going to read out a number of aspects related to your local area and using a scale of 0 to 10 where 10 is 'extremely satisfied' and 0 is 'extremely dissatisfied' how satisfied are you with each statement in your local area.

So firstly, / And what about XXX [INSERT STATEMENT - RANDOMISE ORDER] (Using a scale of 10 to 0 where 10 is "extremely satisfied" and 0 is "extremely dissatisfied"?) Would you say....

- Cleanliness of the streets, pavements and public spaces in your local area
- o That the levels of graffiti and fly posting in your area are kept under control
- That the streets and pavements in your local area are not cluttered with signs and street furniture
- The attractiveness of streets, pavements and public spaces in your local area
- o The condition of the streets in your local area for cycling
- o The condition of the streets and pavements in your local area for walking
- The condition of public spaces in your local area
- Your personal safety when walking about in your local area during the day
- Your personal safety when walking about in your local area at night
- o The ease of finding your way around when walking in your local area
- The ease of crossing the road safely when walking in your local area

10 – Extremely Satisfied		
9		
8		
7		
6		
5		
4		
3		
2		
1		

0 – Extremely Dissatisfied		
(Don't know)		