



**TLRN Customer Satisfaction Survey**  
**Summary Report**  
**April 2006**



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## 1 Executive Summary

### Background and objectives

Transport for London (TfL) Surface Transport commissioned GfK NOP to undertake a survey designed to update a limited selection of data that has been collected on a continuous survey since 1994. The 2005 survey was substantially different both in scope (10 questions instead of 27) and size (a sample of approximately 2,000 instead of approximately 10,000) compared with previous surveys. Finally, the timing of the survey differed, from May to mid-July in 2004 to mid-September to mid-October in 2005.

The same basic methodology was used, with on-street personal interviewing at 25 specified locations along the Transport for London Road Network and using pedestrian counts to obtain sampling intervals.

### Main survey findings

- **Time in catchment area**
  - The mean time respondents spent in the sample centres was 122 minutes.
  - This represents a substantial increase over the previous year (93 minutes).
- **Frequency of visit**
  - 56% visit the centres five or more days a week and a further 29% visit between 1 and 4 days per week.
  - The proportion visiting 5 or more days a week has increased from 51% in 2004.
  - As in 2004 those who walked or cycled to the centres were more likely to visit more often. 77% of those who walked and 67% of those who cycled visit the centres 5 or more days a week.
- **Mode of transport**
  - The main mode of transport used to travel to the centres was on foot, accounting for 37% of all trips to the centres. Other major modes of transport were bus (24%), car/van/lorry (20%) and tube/train (14%).
  - Compared with the 2004 survey, this represents a 9% decline for walking with a 6% increase for bus and a 4% increase for tube/train. This is likely to be due to the survey being undertaken at a later time in the year.
- **Cycling**
  - While 3% had actually used a bicycle on the day of interview, 8% said that they cycled in the centre in the last month. This group was asked questions about cycling facilities.

- On balance, there is dissatisfaction with each of the measures covered. Most positively, 36% said that 'the safety of cycling in the area' was very good or good, while just 22% described 'availability of cycle lanes / advanced stop lines' as very good or good.
- A separate question identified that 37% are either very satisfied or satisfied with 'parking facilities for bicycles in this area'.
- On each aspect, the results represented a modest improvement on the results from 2004.
- **Motorcycles**
  - 2% said that they had ridden a motorcycle in the area in the last month.
  - On balance, they are satisfied with the parking facilities in the centre, however this rating is derived from a small sample size (39 respondents).
- **Quality of pedestrian environment**
  - Respondents were asked how they rated the area in terms of: area dirty/run down/derelect buildings, traffic congestion, vagrants, and roadworks.
  - Apart from traffic congestion, these aspects are not considered to be serious problems; 51% said that traffic congestion is a serious problem compared with the next highest answer; 24% who believe that 'area dirty etc.' is a serious problem.
  - Overall satisfaction with each aspect is less positive than in 2004, especially so for traffic congestion and roadworks.
- **Attitudes towards area**
  - Respondents were asked to rate twelve aspects of the area they were in.
  - The best rated aspects were width of pavements (82% satisfied, 9% dissatisfied), ease of crossing side roads (65% satisfied, 20% dissatisfied), and the quality of pavements (59% satisfied, 26% dissatisfied).
  - The worst rated aspects were amount of pollution/noise from traffic (24% satisfied, 53% dissatisfied), availability of public conveniences (30% satisfied, 48% dissatisfied), and the amount of seating provided in the area (32% satisfied, 45% dissatisfied).
  - Although it was relatively highly rated (58% satisfied, 28% dissatisfied), ease of crossing the main road was rated significantly worse in 2005 compared with 2004.
- **General**
  - There is a concern that the different methodology and the different time of year of the survey may have had a negative effect on the results.

## **2 Introduction**

### **2.1 Background to study**

Transport for London (TfL) has conducted a pedestrian street interview since 1994 with the aim of measuring change in activity at retail centres on the TfL Road Network (TRLN). In the past this has been achieved via substantial annual surveys.

Although this survey shares the same name as the surveys conducted since 1994, it concentrates on aspects of satisfaction amongst users of the TLRN to provide key performance indicator information in relation to cycling, motorcycling and walking. The number of questions has been reduced and the sample size reduced from approximately 10,000 to approximately 2,000. Where possible, this report provides comparisons with previous surveys.

The reduced sample size should still be adequate to provide robust data at a strategic level. It is not large enough, however, to provide a comparison between individual centres at an acceptable confidence level.

There is a concern that the different survey methodology and the different time of year of the survey may have had a negative effect on the results.

### **2.2 Objectives**

The study aims to provide levels of:

- Satisfaction with aspects of cycling in the local area
  - safety of cycling in the area
  - security of bicycles in the area
  - information on cycle routes
- Satisfaction with parking facilities for motorcycles/mopeds/scooters in the area
- Satisfaction with the local environment
  - traffic congestion
  - pollution
  - quality of an area
  - personal safety and security

The study aims are also to provide qualitative information on:

- numbers of visitors to the areas
- the time spent in the areas
- the mode of travel to the areas

### 3 Main Findings

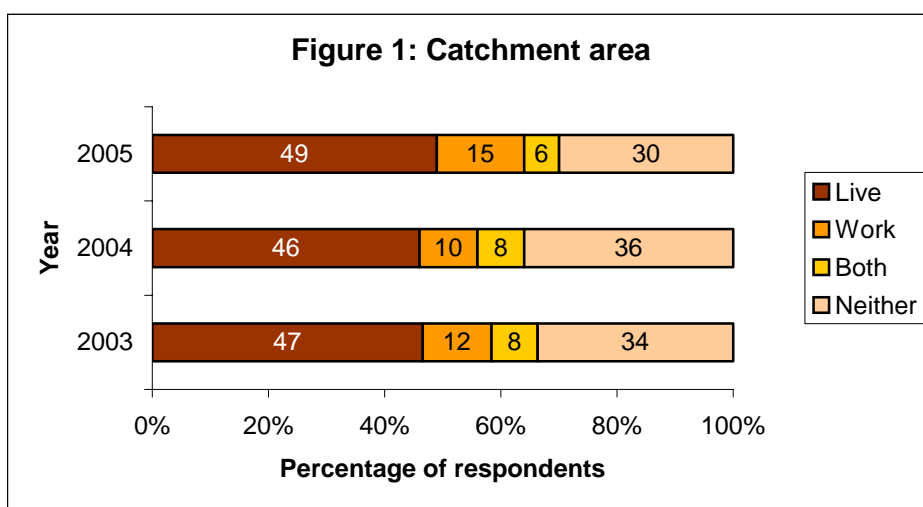
#### 3.1 Details of Visiting Area

The first questions on the questionnaire dealt with the catchment area for each sample centre.

##### 3.1.1 Catchment Area

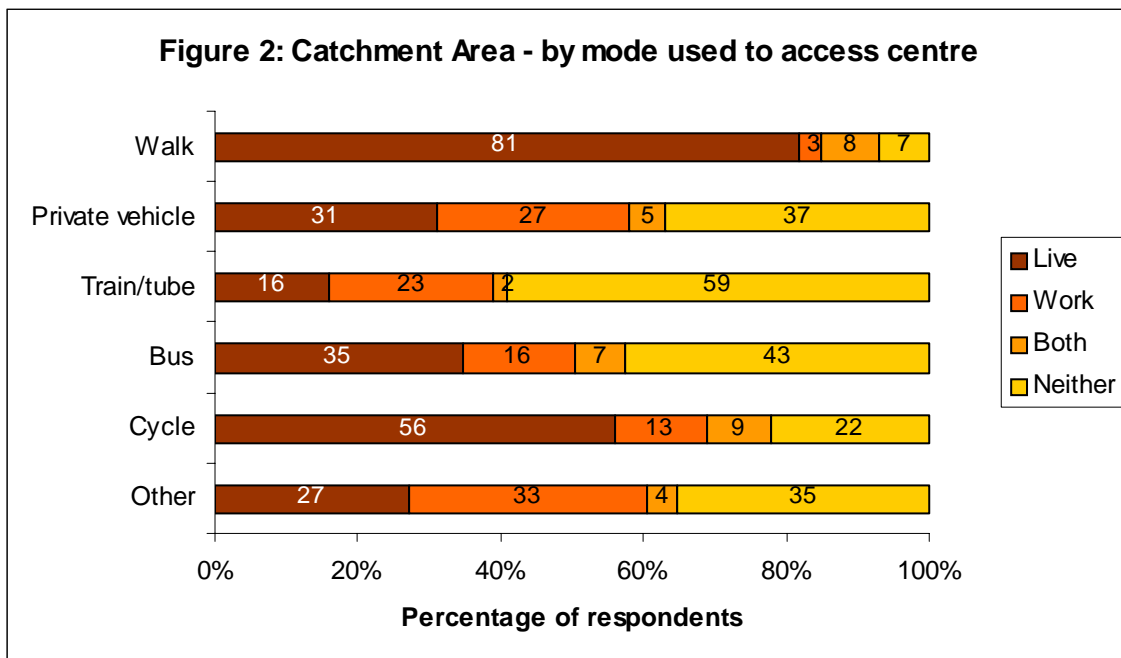
Respondents were asked whether they lived and/or worked within 10 minutes walk of the sample centre.

Slightly more respondents live or work within 10 minutes walk in 2005 than in the previous years. 55% live in the catchment area in 2005 (54% in 2004), and 21% work in the area (18% in 2004).



Base: 2003 (9,548), 2004 (10,777), 2005 (2,025).

When analysed by mode used to access the centre (see Figure 2), nearly nine tenths of respondents who walked are those who live in the 10 minute catchment area (89%). This group also accounted for nearly two thirds (65%) of those who cycled – an identical figure to 2004. Public transport is more likely to be used by those who neither live nor work in the area; train/tube (59%) and bus (43%).

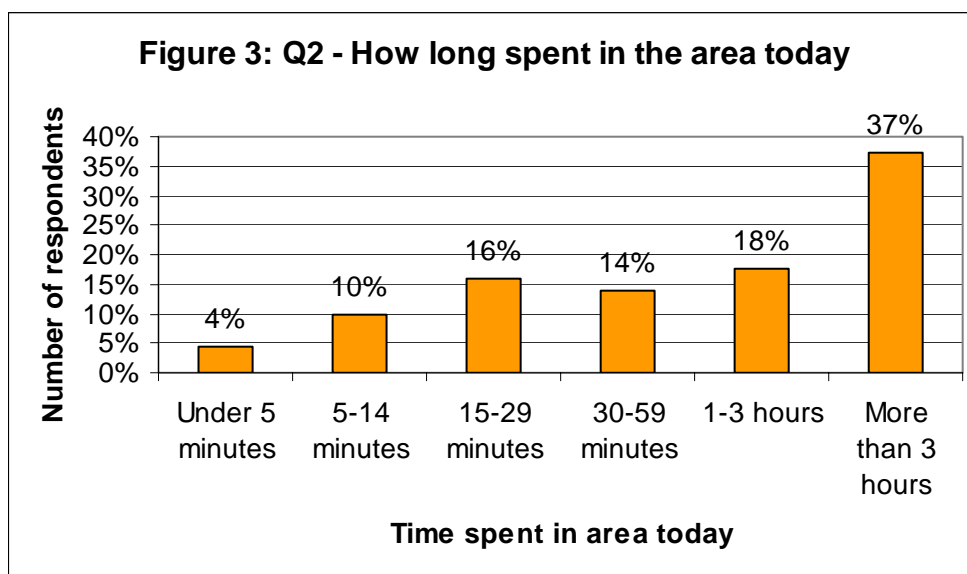


Base: live (986), work (299), both (131), neither (606)

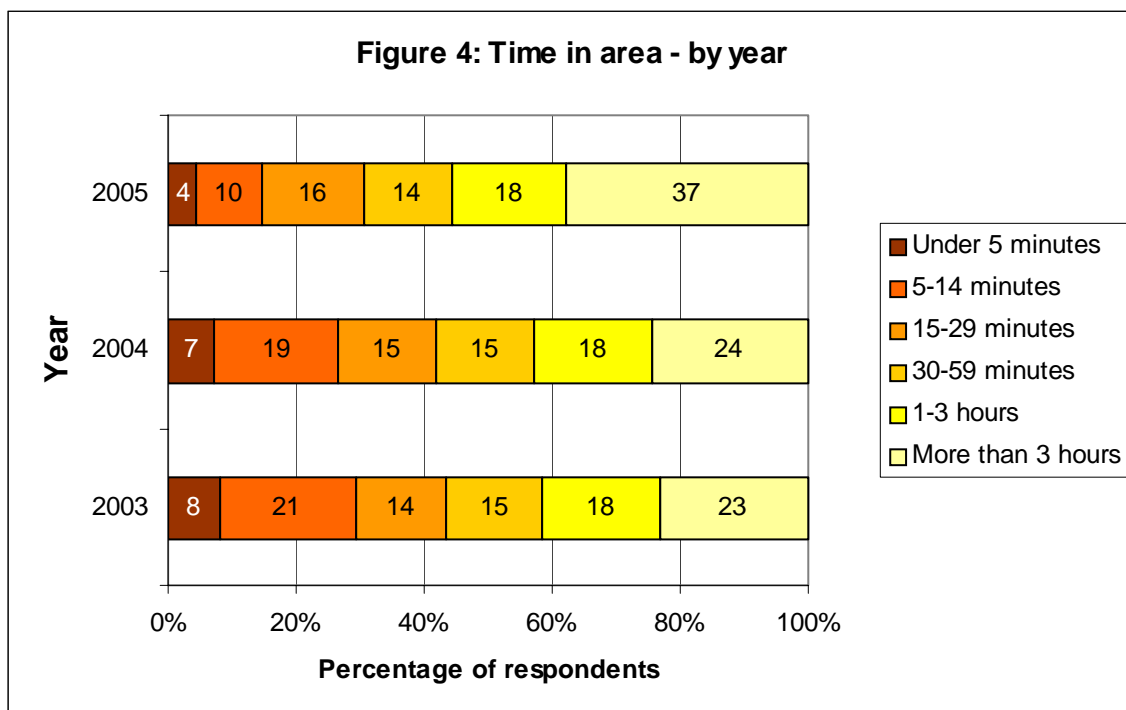
### 3.1.2 Time in Area

Respondents were asked how long they were planning to spend in the areas, as defined by the diagrammatic map of the centre.

37% were planning to spend more than 3 hours. 18% planned to spend between 1 and 3 hours, and 44% to spend less than an hour (see Figure 3).



Base: 2,025 respondents



Base: 2003 (9,548), 2004 (10,777), 2005 (2,025)

A higher proportion of people are spending longer in the areas than previous years. The mean time increased from 93.3 minutes in 2004 to 122.2 minutes in 2005. Also, the figure of 37% who spend over 3 hours is a significant increase from both the previous years (24%) and 2003 (23%). Fewer respondents planned to spend under 15 minutes in 2005 (14%, compared to 26% in 2004 and 29% in 2003). The source of these differences is discussed below.

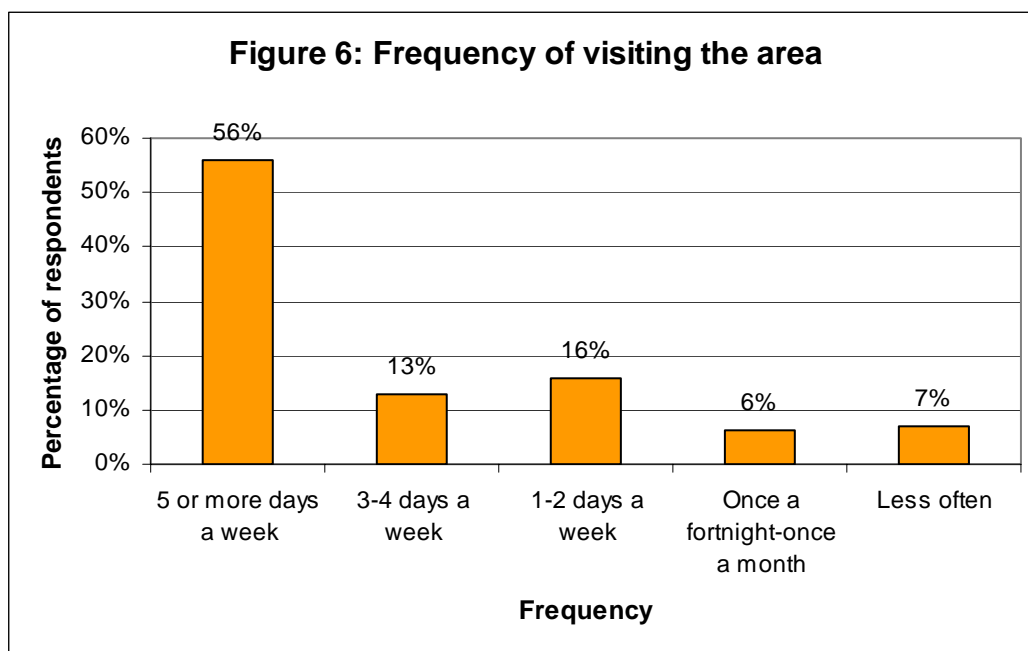
Of those who work only 40% spent over three hours in the area. Those who cycle are most likely to spend more than 3 hours (45%), along with those who use 'other' modes apart from those listed on the questionnaire (46%). People of all ages tended to spend a similar length of time in the area.

### 3.1.3 Frequency of Visit

Respondents were asked how often they visit the area marked on the map.

Over half (56%) visited 5 or more days a week. 29% visited between 1 and 4 days per week, and 13% visited less often (see Figure 6).

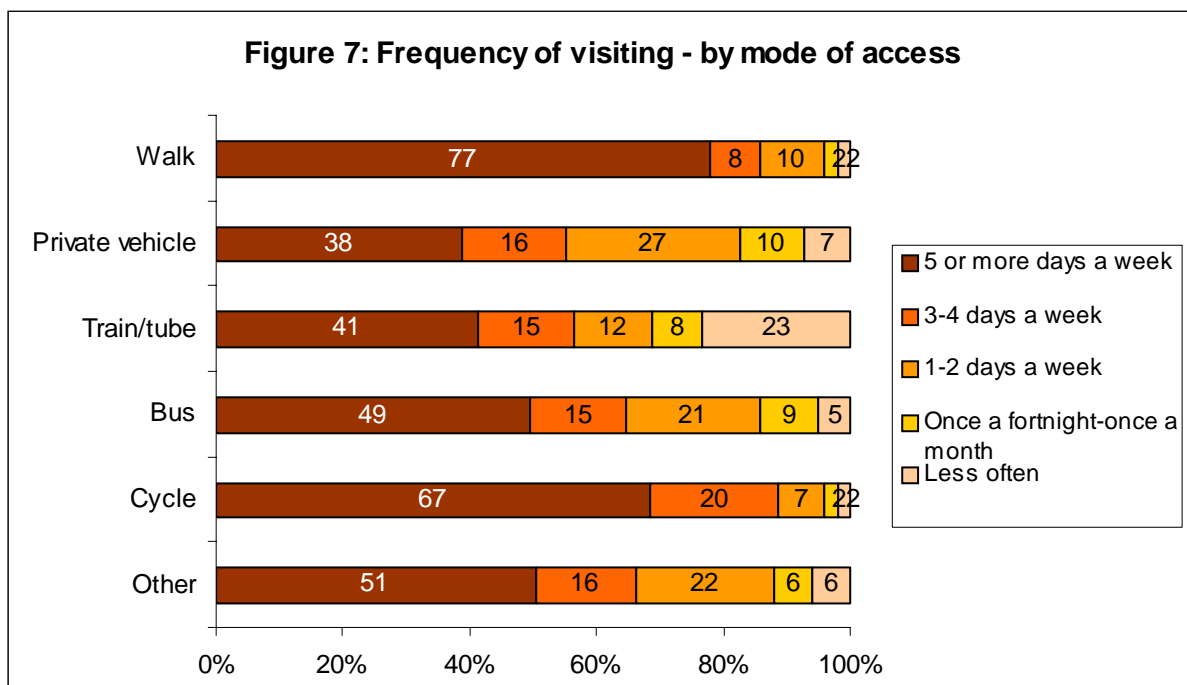
There has been a slight overall increase in people visiting 5 or more days a week since previous years – 56% in 2005 compared to 51% in both 2004 and 2003.



Base: 2025 respondents

Those who visited on foot or on a bicycle were most likely to be frequent visitors, with 77% of walkers visiting 5 or more times a week, and 67% of cyclists. Those visiting least often were those who take a train or tube to visit the area (23% of these visit less frequently than once a month) (see Figure 7).

Those who work in the area were slightly more likely to be frequent visitors (59% visit 5 times a week or more), and home based parents/carers are the least frequent visitors (24% visit once a fortnight or less often, compared to 13% of all other respondents).



Base: 2,025 respondents

### 3.1.4 Mode of Transport

The main mode of transport used to reach an area was walking (37%), followed by bus (24%) and car/van/lorry (20%) (see figure 8).

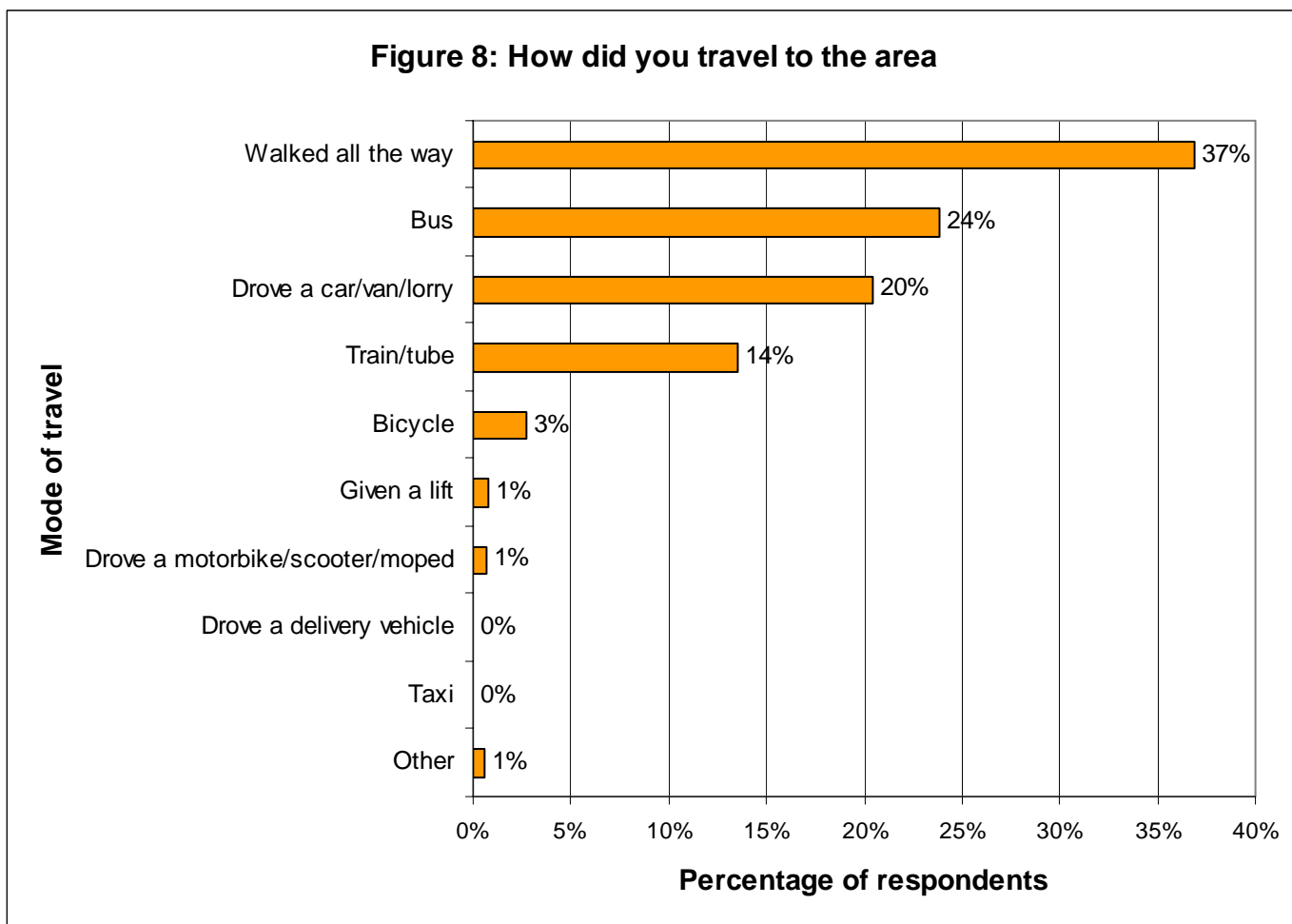
The proportion of people who walk all the way has decreased from 46% in 2004, while the use of public transport modes – bus and tube/train has increased, as indicated in figure 9.

Women are more likely to have walked (39%, compared to 34% of men), and are less likely to have taken the train or tube (11%, compared to 16% of men). Women are also less likely to have travelled by bicycle (1%, compared to 4% of men).

Older people are more likely to have walked (45% of respondents over the age of 45, compared to 32% of those under 45), and retired people are more likely to have walked (54%). They are far less likely to have taken the train (3% used as mode) or tube (18% used as mode).

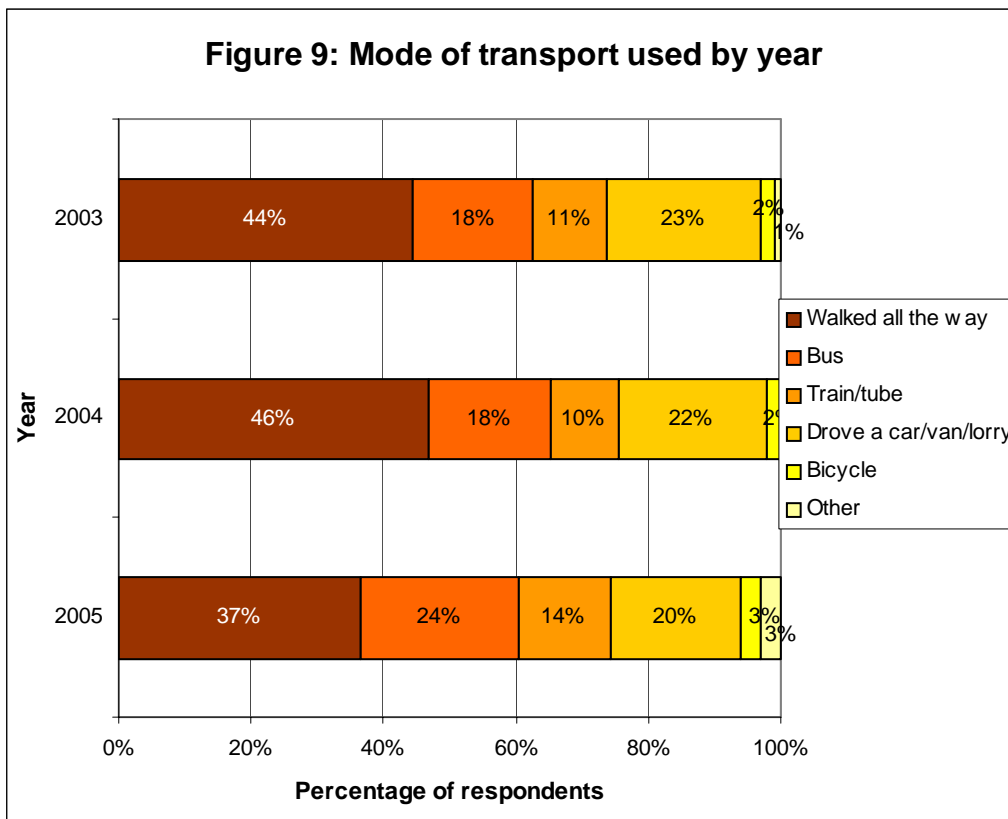
Younger people are more likely to have used public transport, particularly students (41% took the bus on the day of the interviews and 26% took the train/tube).

There is very little difference in socio – economic group between those who walked. However, people of groups DE are more likely to have taken the bus, and less likely to have driven a private vehicle.



Base: 2,025 respondents

As noted above the proportion that walked has declined substantially since the last survey. There are two possible reasons for change. First, the timing of the survey fieldwork in September and early October is clearly different to the previous survey; May to mid-July. As a result, some of the later shifts will have been completed in fading light and probably, in less clement weather conditions. Second, the decline in walking is almost entirely matched by an increase in use of bus and tube/rail. This, could, reflect increasing usage of these forms of transport over the last two years.

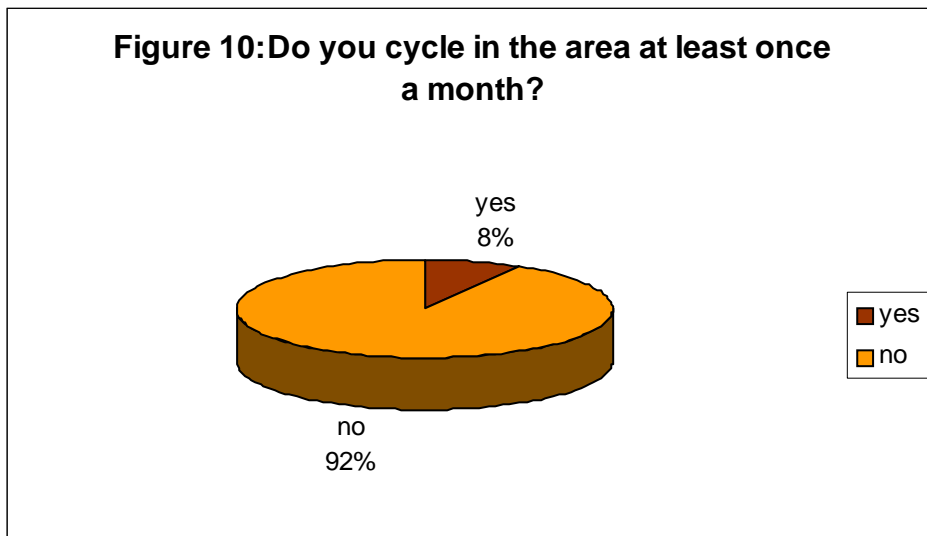


Base: 2003 (9,548), 2004 (10,777), 2005 (2,007)

### 3.2 Cyclists

8% of respondents cycle in the areas at least once a month. Men (11%) are more likely to do so than women (6%), and those under 24 are also more likely to be cyclists (11%) than other age groups.

The majority (87%) of those who travelled to the areas by bicycle on the day interviewed said they cycle at least once a month.



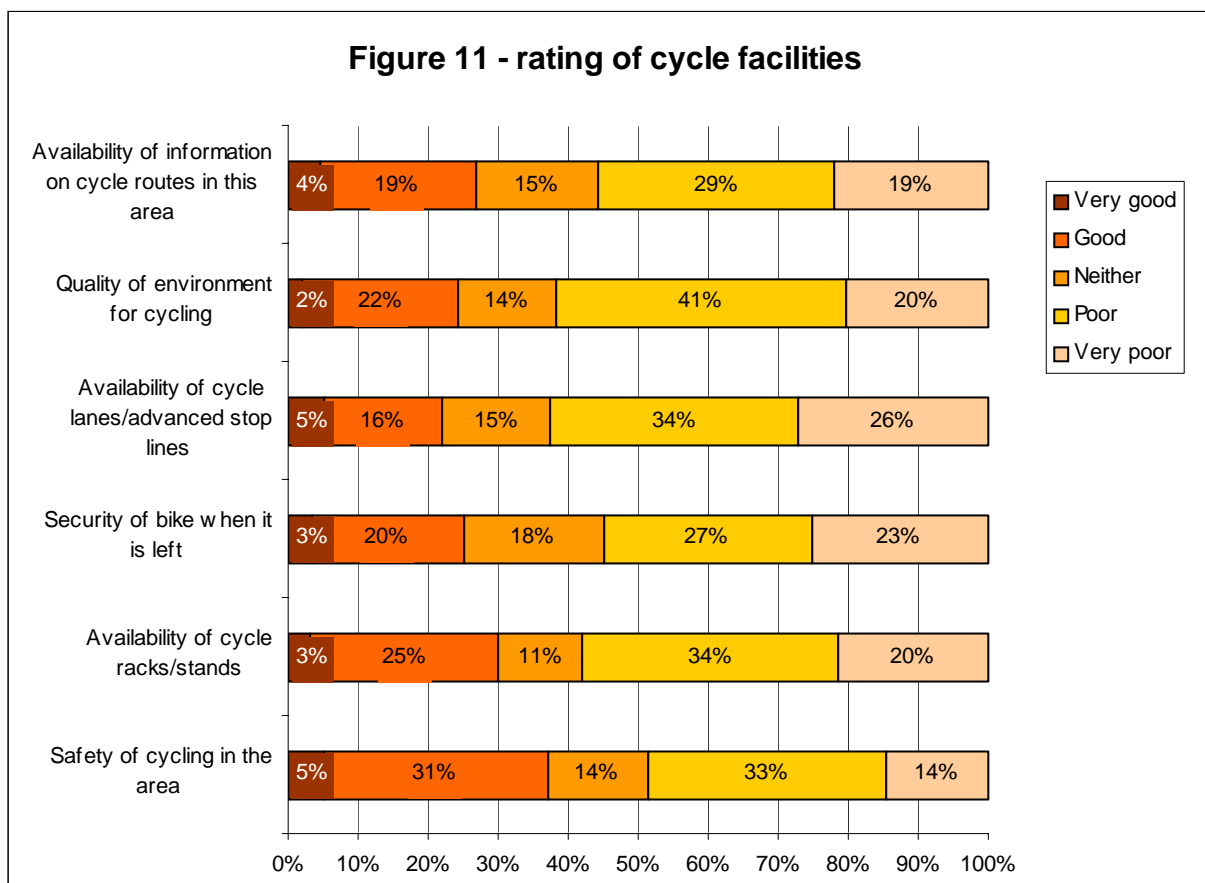
Base: 2,025 respondents

### 3.2.1 Attitudes towards cycling

Respondents who said they cycle at least once a month were asked to rate a list of aspects of cycling in their area. They were given a 5-point semantic scale from which to choose a response, and the order in which the aspects were read out was rotated to avoid order bias.

The aspects they were asked to rate were:

- Safety of cycling in the area
- Availability of cycle racks/stands
- Security of cycle when it is left
- Availability of cycle lanes/advance stop lines
- Quality of environment for cycling
- Availability of information on cycle routes in the area



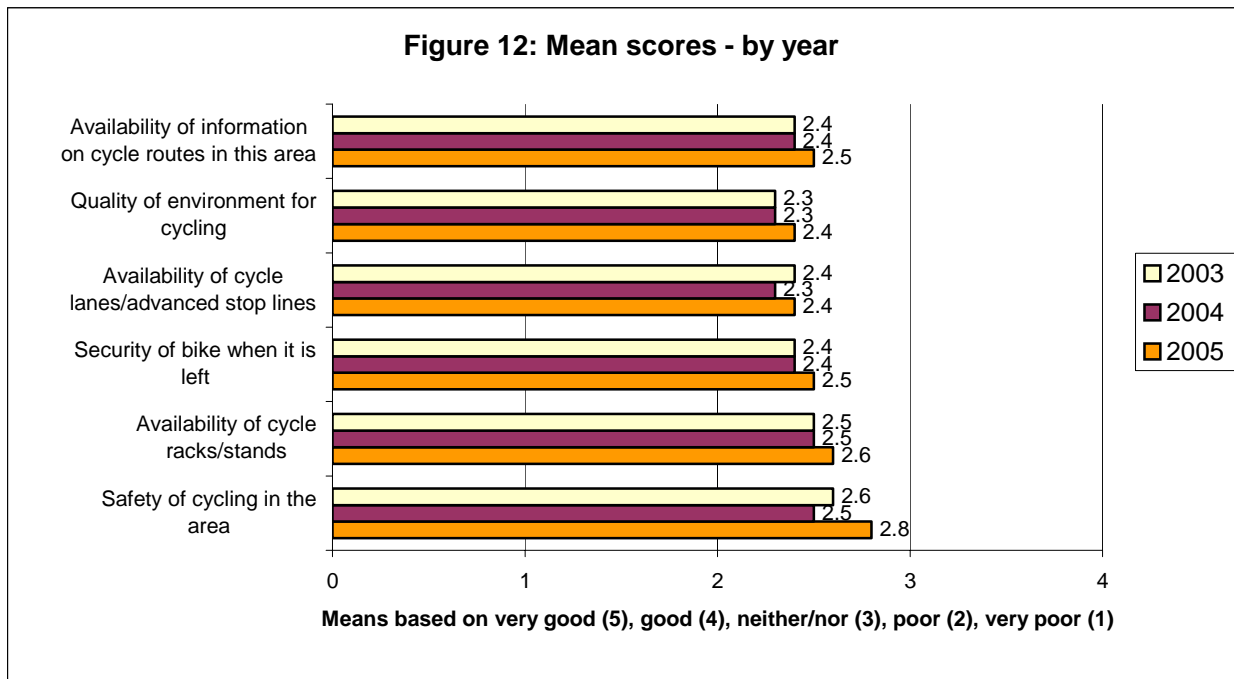
Base: 166 respondents for each statement

Overall, cyclists are dissatisfied with the facilities available to them.

The least rated aspects were the quality of environment for cycling (61%) and the availability of cycle lanes/advanced stop lines (60% rated these as poor or very poor).

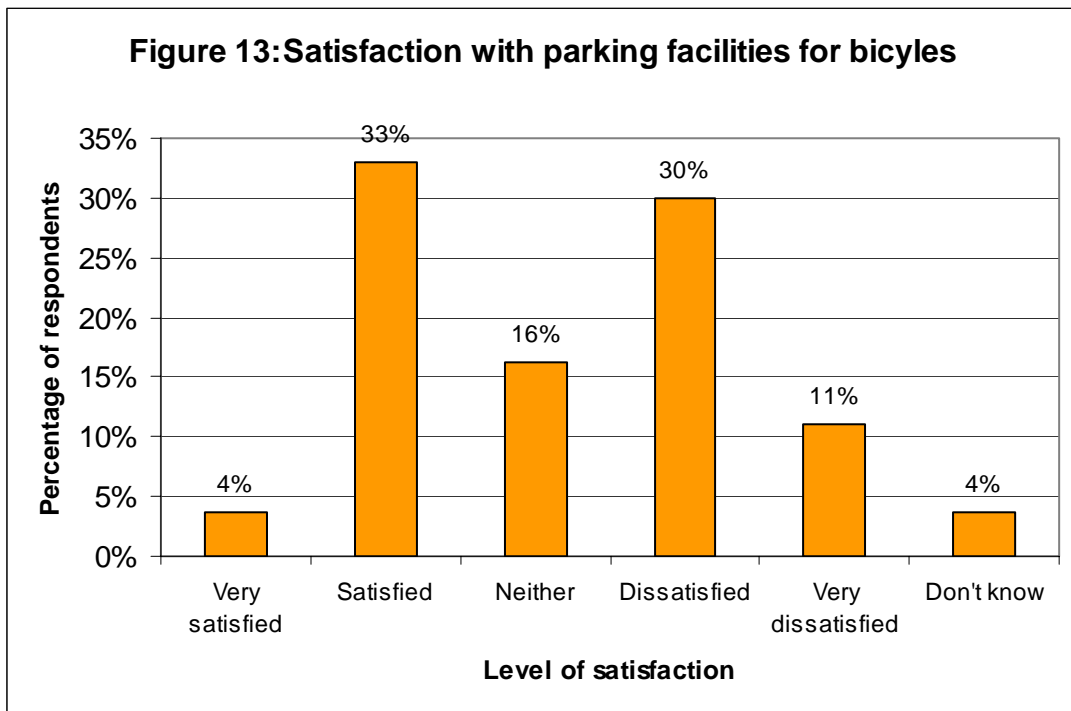
The aspects rated most highly were safety of cycling in the areas (36% saying very good or good), followed by the availability of cycle racks/stands (28%).

These highest and lowest rated aspects were the same as in 2004.



When compared to mean scores from previous years (see Figure 12), satisfaction has improved slightly with all aspects. The greatest increase was for safety of cycling in the areas (2.5 in 2004 to 2.8 in 2005).

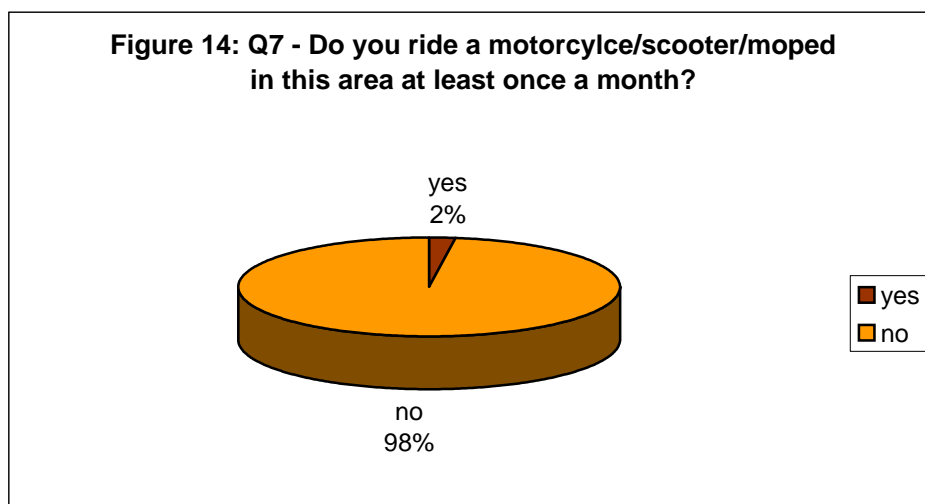
Respondents were also asked how satisfied or dissatisfied they were with parking facilities for bicycles in the areas. 41% said they were dissatisfied or very dissatisfied (see Figure 13).



Base: 166

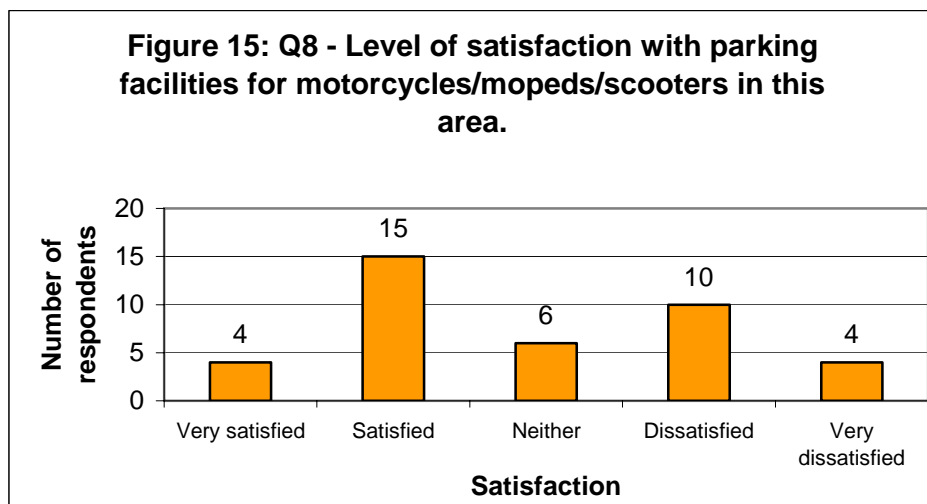
### 3.3 Motorcycles/mopeds/scooters

2% of the sample rides a scooter in the area at least once a month (see Figure 14).



Base: 2,025 respondents

Those that ride a motorcycle/moped/scooter at least once a month were asked how they rated the parking facilities. 43% said they were satisfied or very satisfied with these, with 32% saying they were dissatisfied or very dissatisfied.



Base: 39 respondents

Compared with last year, there is a reduction in the proportion saying 'very dissatisfied', from one fifth to around one in ten.

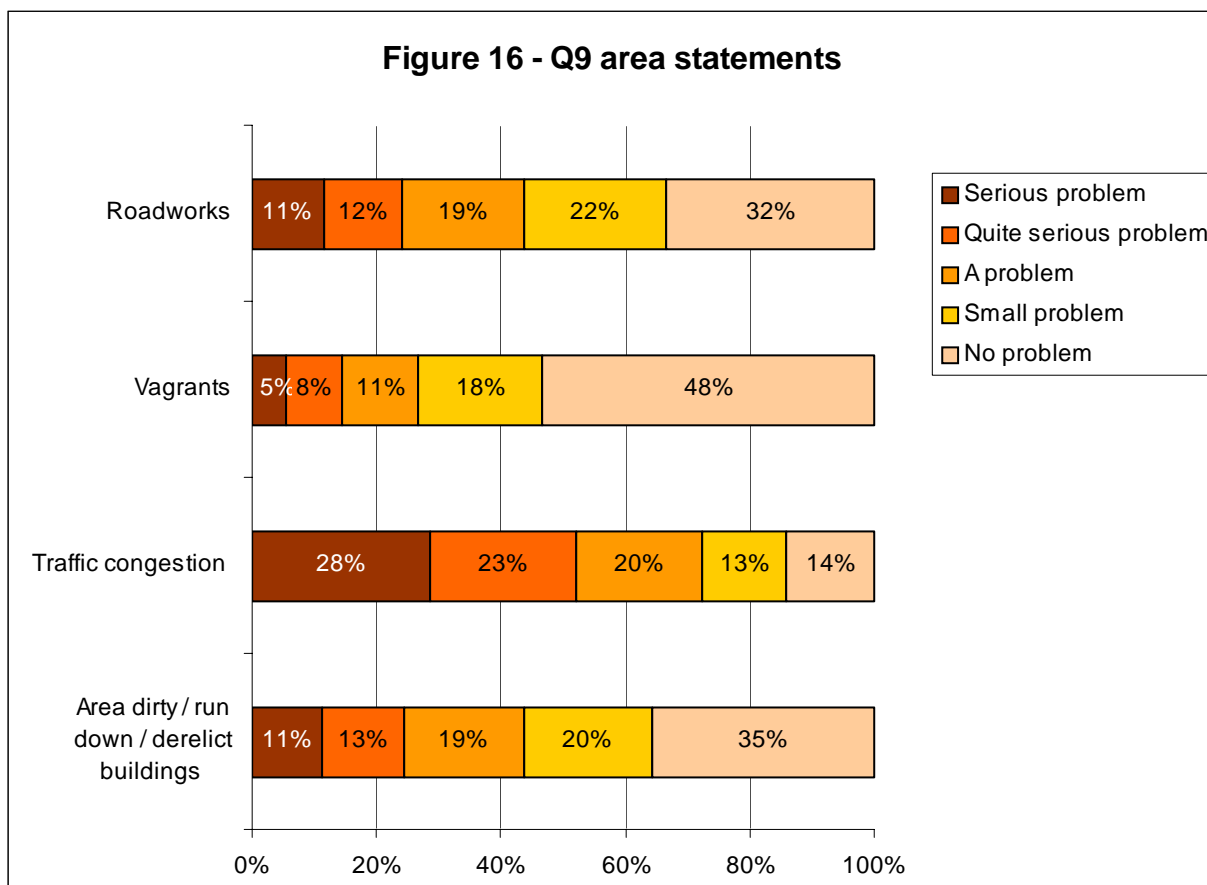
Due to the low number of motorcyclists (39) represented in this survey all figures quoted above must be treated with caution as the small sample will result in wide confidence limits in any response.

### 3.4 Quality of Pedestrian Environment

Respondents were asked about the quality of the environment in their local area. They were asked to rate the following aspects in terms of how problematic they perceived them to be:

- Area dirty/run down/derelict buildings
- Traffic congestion
- Vagrants
- Roadworks

The statements were rotated so that order bias was minimised.



Base: 166 respondents for each statement

Each of the aspects is viewed as having worsened compared to last year’s research, although there is a distinct difference between the two ‘transport’ issues where the difference is significant and the two ‘non-transport’ issues where the difference is not significant.

As in 2004, traffic congestion was seen as the only significant problem. Just over half (51%) of respondents said that traffic congestion was a serious or quite a serious problem, compared to 33% in 2004 and 36% in 2003. Roadworks are also perceived as a significantly greater problem than last year, with 23% of respondents saying these were a serious or quite a serious problem in 2005, compared to 11% in 2004. Area dirty/run down/derelict buildings and vagrants have also worsened, though to a lesser extent.

Traffic congestion was most likely to be seen as a serious or quite a serious problem by the over 65 age group (58%). It is also regarded as a greater problem by those who do not use public transport; pedestrians are most likely to regard traffic congestion as a problem (56%). There is little difference between Inner and Outer London.

Vagrants are seen as more of a problem to respondents of socio-economic groups C2DE (15%, compared to 11% of ABC1s). It is also more likely to be seen as problem by more frequent users and

those in Inner London. The areas of London where vagrants are seen as most problematic are South Central (22%) and North & East (20%).

Table 3 shows that whilst ratings for all aspects of the environment fell slightly in 2005 compared to 2004, the overall scores for each aspect are still high. Mean scores were calculated where 1 = serious problem, and 5 = no problem. All aspects are seen as slightly greater problems than in 2004.

**Table 3: Ratings of features of local environment by year (mean scores)**

Aspect	2004	2005	Change
Traffic congestion	3.10	2.62	-0.48
Area dirty/run down/derelect buildings	3.65	3.58	-0.07
Roadworks	4.03	3.54	-0.49
Vagrants	4.25	4.08	-0.17

Table 4 below presents the mean scores for a number of different sub-groups within the sample. Across the TLRN there is a clear distinction between the two transport related aspects and the two that are not.

For transport issues, young people considered them to be less of a serious issue, and perceptions of seriousness generally increase with age. Older people were less bothered by the other two issues.

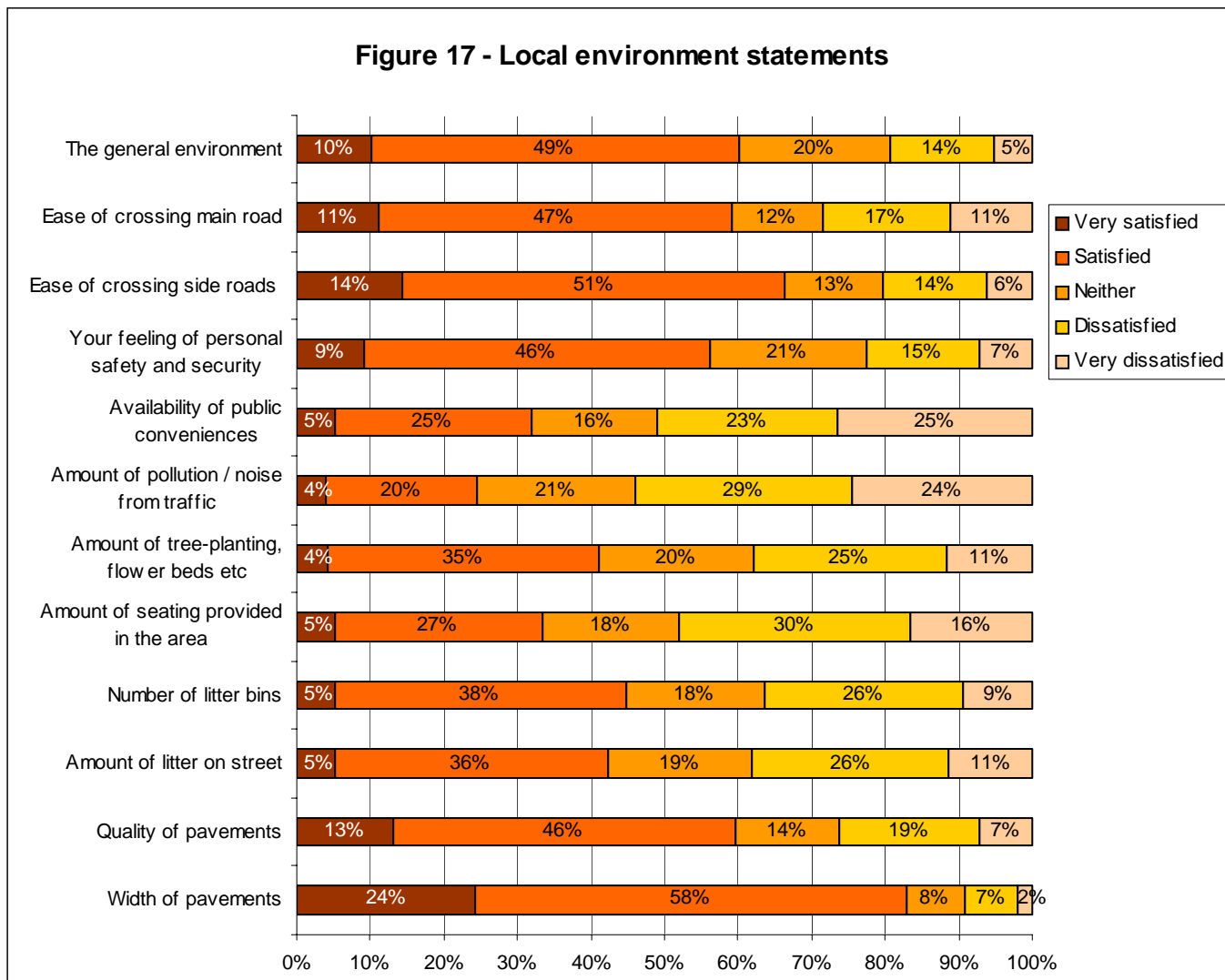
As in 2004 the differences between the two gender groups were modest.

Finally, and again similar to 2004, those who live or work within 10 minutes of the centres tended to be more negative than those who do not.

**Table 4: Ratings of features of local environment by TfL area, age, gender and whether live/work within 10 minutes (mean scores)**

TfL Area	Area dirty/run down/derelict buildings	Traffic congestion	Vagrants	Roadworks
<b>Inner/outer London</b>				
Inner London	3.33	2.63	3.76	3.51
Outer London	3.85	2.62	4.42	3.58
<b>Age</b>				
16 to 24	3.57	2.85	3.97	3.75
25 to 44	3.54	2.61	3.98	3.54
45 to 64	3.56	2.57	4.19	3.46
65+	3.82	2.43	4.41	3.36
<b>Gender</b>				
Male	3.59	2.69	4.00	3.60
Female	3.57	2.56	4.15	3.48
<b>Within 10 minutes of area</b>				
Live	3.56	2.59	4.08	3.50
Work	3.42	2.73	3.84	3.52
Neither live nor work	3.76	2.61	4.26	3.63

Respondents were also asked to rate twelve features of the pedestrian environment, according to a five point semantic scale ranging from very satisfied to very dissatisfied (see Figure 17).



Base: 2025 for each statement

Respondents were most satisfied with the width of the pavements (82% are satisfied or very satisfied) and the ease of crossing side roads (65%).

The aspects that received lowest scores are the same as in 2004. Respondents are least satisfied with the amount of pollution/noise from traffic (53% are dissatisfied or very dissatisfied; 54% in 2004), the availability of public conveniences (48%; 55% in 2004) and the amount of seating provided in the area (46%; 45% in 2004).

Amount of seating is perceived as more dissatisfactory by females (48%, compared to 43% of males) and also by those of C2DE socio economic groups (49% compared to 43% of ABC1).

Means were calculated, where very satisfied = 5 and very dissatisfied = 1. Table 5 following shows the changes in mean satisfaction from 2004.

**Table 5: Ratings of features of local environment by year (mean scores)**

Aspect	2004	2005	Change
Width of pavements	3.88	3.96	+0.08
Ease of crossing side roads	3.62	3.55	-0.07
General environment	3.51	3.45	-0.06
Quality of pavements	3.37	3.41	+0.04
Your feeling of personal safety and security	3.48	3.36	-0.12
Ease of crossing main road	3.51	3.32	-0.19
Number of litter bins	3.11	3.03	-0.08
Amount of litter on street	2.93	2.98	+0.05
Amount of tree planting, flower beds etc	2.94	2.96	+0.02
Amount of seating provided in the area	2.78	2.74	-0.04
Availability of public conveniences	2.38	2.58	+0.2
Amount of pollution/noise from traffic	2.53	2.51	-0.02

Ease of crossing both side and main roads worsened in 2005 although the mean score still shows high satisfaction with this feature of the local environment. However, year on year comparisons are not directly comparable due to the difference in the time of year of the 2004 and the 2005 surveys. The 2005 programme was undertaken much later in the year when fewer hours of daylight may have had an effect on pedestrians' satisfaction with aspects such as crossing the main and side roads, feeling of personal safety and the general street environment.

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