

**British Motor Show
evaluation**

08042

September 2008



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Research conducted by Synovate

1. Executive Summary

- This report contains results from an online survey of visitors to TfL's 'Know about Safer and Smarter Driving in London' stand at the British International Motor Show 2008. Interviews were conducted using an online self completion method.
- Visitors were generally positive in their attitudes towards the stand. The majority said that they found it enjoyable and that their opinion towards TfL was more positive as a result.
- Eight in ten visitors had heard of the term red route. Half of these (53%) were aware that TfL is responsible for the red route prior to their visit.
- Around three fifths (62%) had seen new information about safer driving in London and around half (52%) had seen new information about smarter driving. The main areas that visitors feel they learnt about were the congestion charge (45%), rules and regulations on red routes (37%) and car clubs (37%).
- Around half of visitors (47%) said that they were likely to use the TfL Journey Planner as a result of the information provided.
- Looking at driving behaviours, the majority of drivers said that they never drive in bus lanes, stop in yellow box junctions or fail to look out for cyclists and motorbike riders. The majority of those who did carry out these behaviours felt that they were less likely to do so as a result of visiting the stand.

2. Background and Objectives

The British International Motor Show (BIMS) took place at the Excel Arena from 22nd July to 3rd August 2008. Transport for London (TfL) decided to attend this event, in order to communicate with drivers and their families. The TfL 'Know about smarter and safer driving in London' stand provided driver-focused messages, including information on:

- Car clubs
- Paying the Congestion Charge
- How to avoid a fine when using London's roads
- Safety cameras
- Smarter and Safer driving

The stand also featured a large remote-controlled car track to represent London, on which attendees were invited to drive their cars in a skilled way, in order to score points and get on to the leader board.

In addition to the main stand, TfL also had a stand in the 'Act On CO2 Greener Driving Pavilion', which provided information on action which TfL is taking in order to reduce CO2 emissions in London.

An online survey was conducted in order to gauge reactions towards the stand. Visitors were invited to complete the survey either on a laptop at the stand, or at home. As an incentive to take part, those completing the survey were entered into a prize draw to win a Brompton bike. A total of 218 visitors participated in the survey.

The aim of the research was to assess:

- Attitudes towards the TfL stand
- Whether visitors feel they learned useful facts about smarter and safer driving
- Whether they are more likely to use the TfL website and advertised products or services as a result of visiting the stand

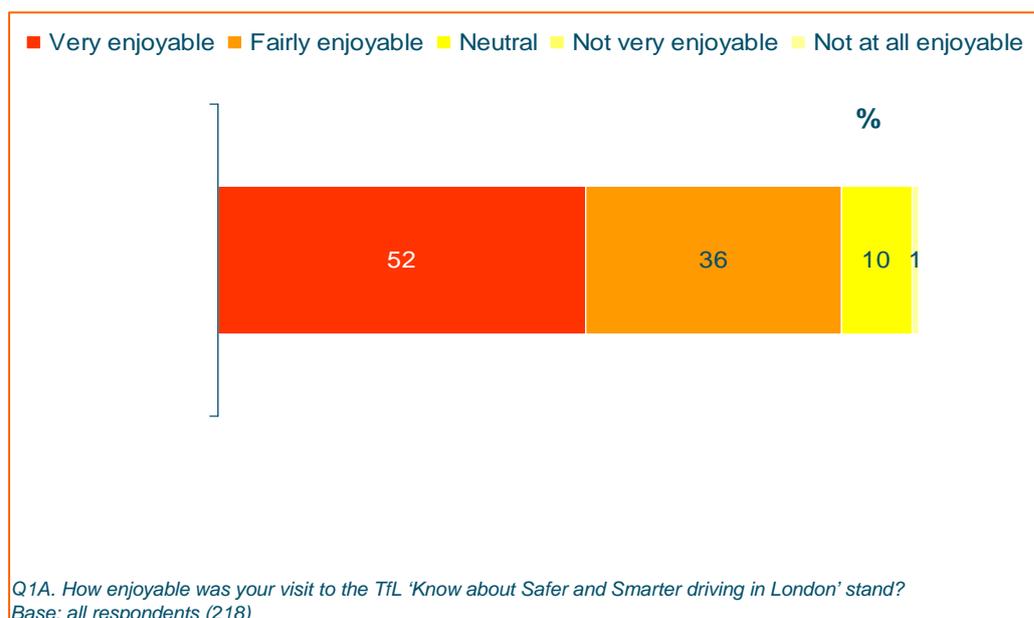
- Whether they will change their driving habits as a result of visiting the stand (target 10% saying they would)

3. Key Findings

3.1 Attitudes towards the TfL stand

Encouragingly, visitors were generally very positive about the stand, with almost 9 in 10 (88%) rating their visit to the stand as very or fairly enjoyable. One in ten (10%) were neutral towards the stand, with just one per cent saying that they did not enjoy their visit. There were no significant differences between key subgroups in terms of enjoyment.

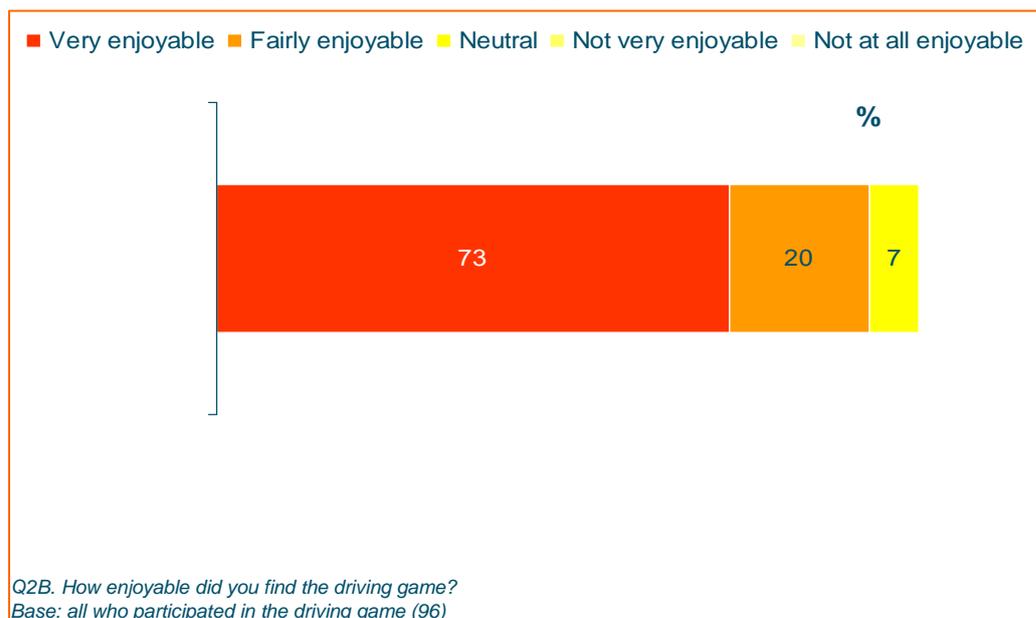
Chart 1: How enjoyable found visit to the stand



Around four in ten (44%) visitors took part in the remote controlled driving game. Those aged under 35 were more likely to participate than those aged 35+ (55% compared with 28%).

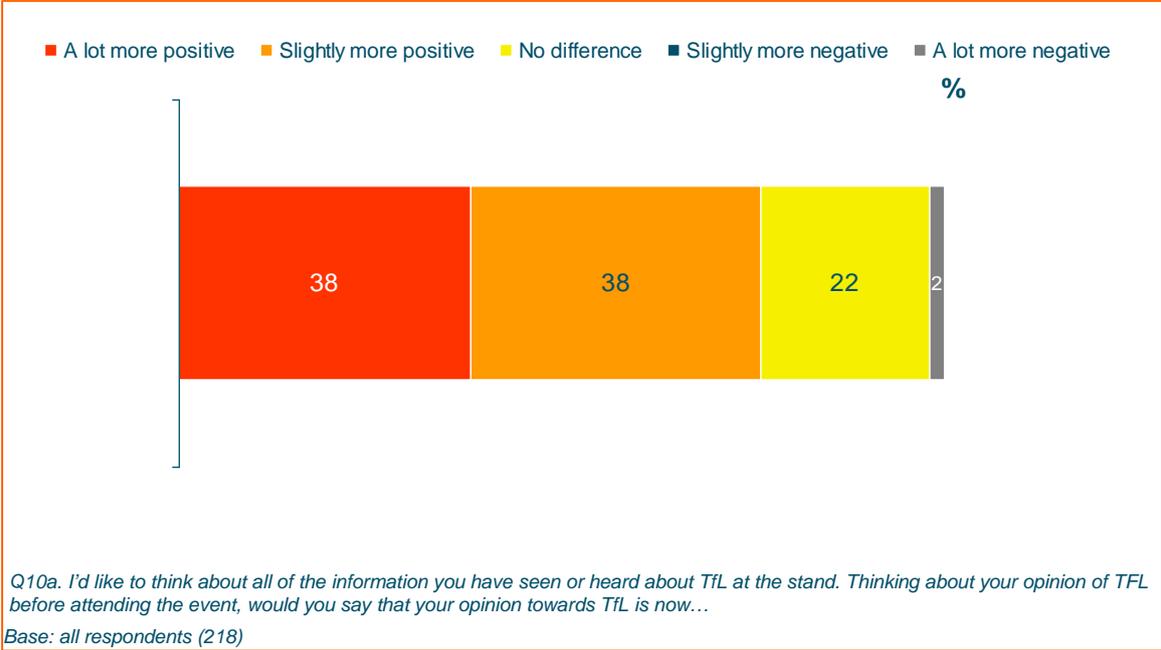
Again, attitudes were very positive, with almost three quarters (73%) of those who participated rating it as very enjoyable and one in five (20%) rating it as fairly enjoyable. No individuals felt that the game was not enjoyable. There were no significant differences between subgroups.

Chart 2: How enjoyable found the driving game



Thinking overall about what they had seen or heard at the stand, three quarters of visitors (76%) said that their opinion towards TfL is more positive as a result. Just two per cent felt more negative towards TfL, with the remaining 22% saying that the stand had made no difference to their opinion.

Chart 3: Whether opinion of TfL is more or less positive as a result of visiting the stand



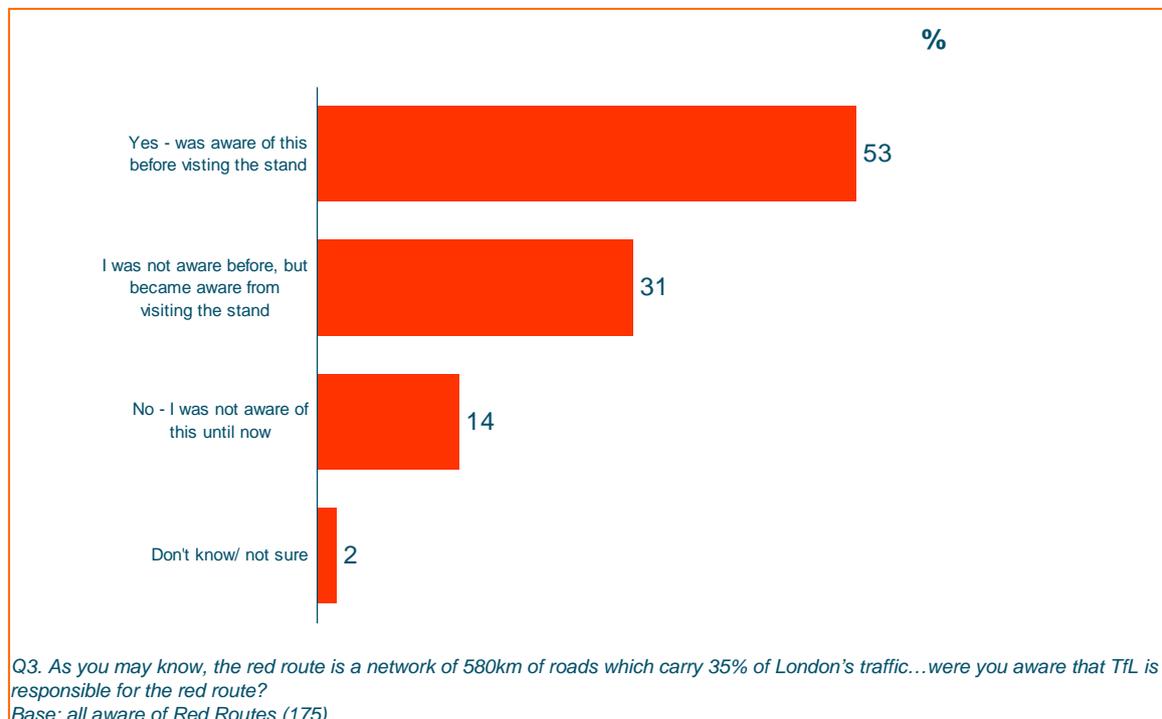
3.2 Awareness of and attitudes towards TfL responsibilities and services

Red Routes

Eight in ten visitors (80%) were aware of the term 'red route'. Unsurprisingly, those who drive in London were more likely to be aware of the term than those who do not (86% vs. 69%), as were Londoners (87% vs. 74% of non-Londoners). Awareness was also higher among those aged 35 and over (91% vs. 73% of under 35s).

All those who had heard of red routes were asked if they were aware that TfL is responsible for developing and maintaining the network, as shown in Chart 4 below.

Chart 4: Awareness of TfL's responsibility for Red Routes



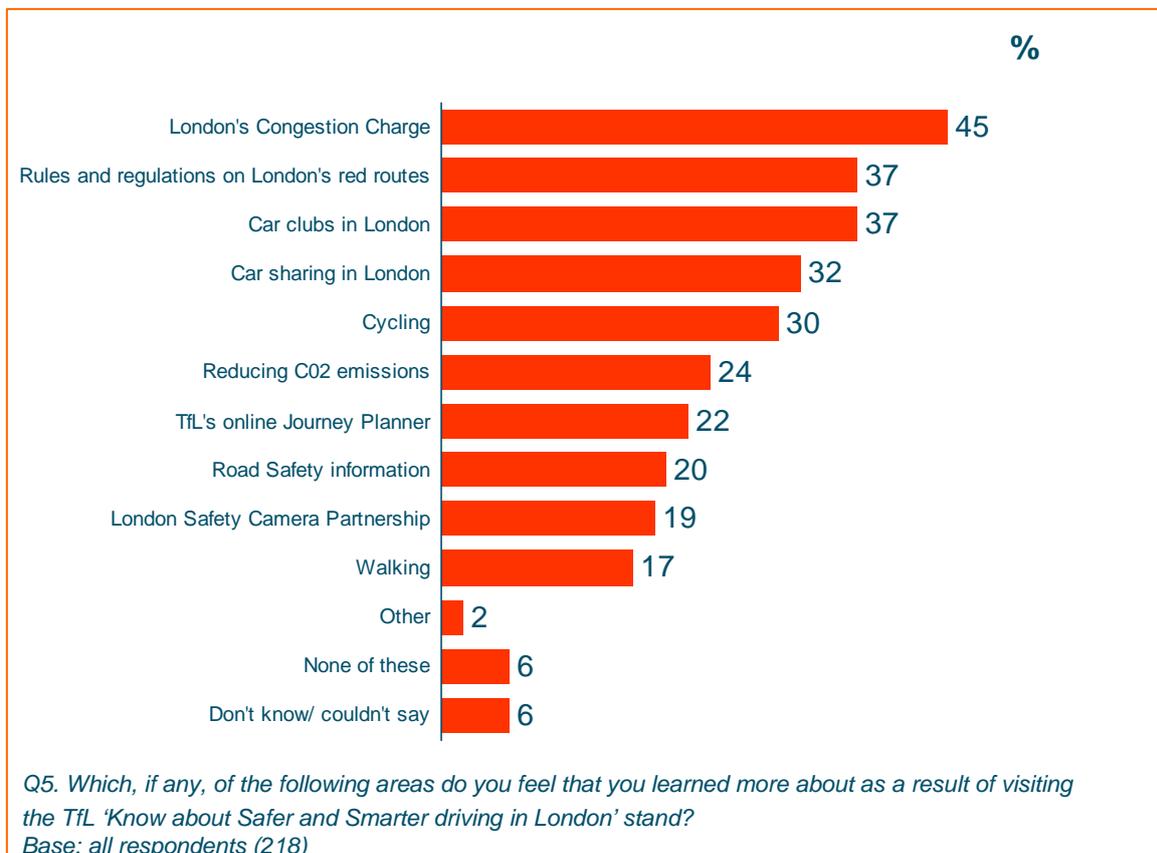
Around half (53%) of those familiar with the term red route were already aware that TfL is responsible for it, with a further third (31%) saying that they had learnt this from their visit. Fourteen per cent were unaware of this.

Smarter and Safer Driving

Around three fifths of visitors (62%) felt that they had seen new information about safer driving in London at the TfL stand, and around half (52%) had seen new information about smarter driving.

All visitors were then prompted with a list of the areas of information provided on the TfL stand, and asked which they learned more about, as shown in Chart 5.

Chart 5: Areas learned more about at the TfL stand (prompted)

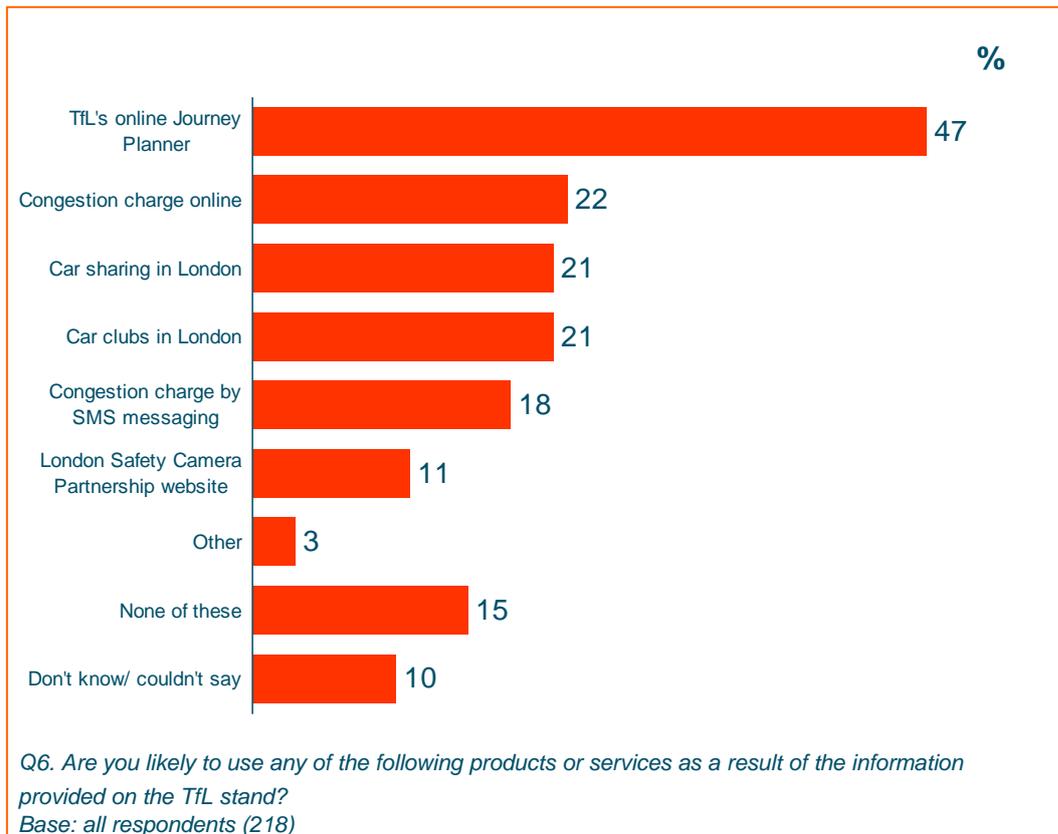


The main areas that visitors felt they had learned more about are London's congestion charge (45%), rules and regulations on red routes (37%) and car clubs in London (37%).

Likelihood of using products and services

Almost half of visitors (47%) said that they were more likely to use TfL's online Journey Planner as a result of their visit to the stand. Around a fifth felt more likely to pay the congestion charge online (22%), or use car sharing or car clubs in London (both 21%).

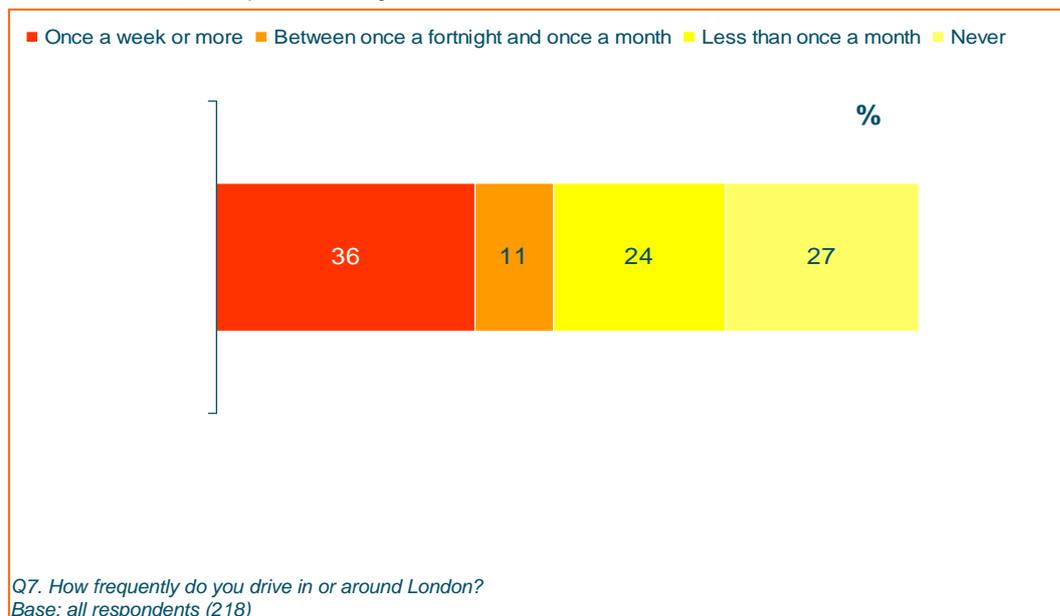
Chart 6: Whether more likely to use any of the following products and services as a result of the information provided



3.3 Driving Behaviour

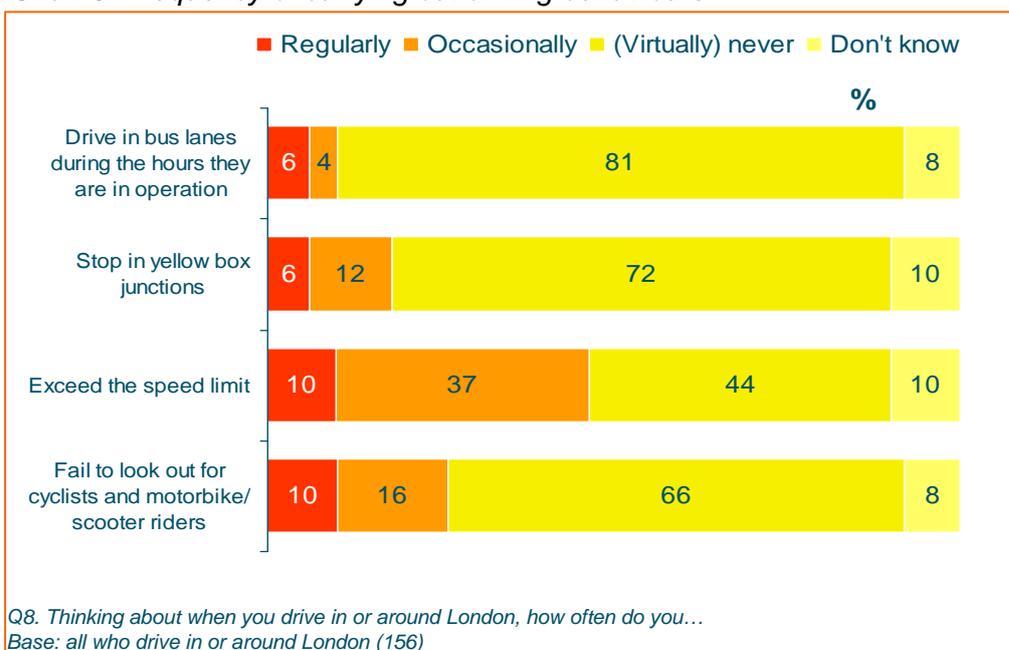
A third of visitors drove in or around London once a week or more (36%). Around one in nine (11%) drove once or twice a month, and a quarter (24%) drove less often. A further quarter (27%) said that they never drive in London.

Chart 7: Frequency of driving in or around London



Those who drive in or around London were asked about a number of driving behaviours, as shown in Chart 8.

Chart 8: Frequency of carrying out driving behaviours



Only one in ten drivers (10%) admit to driving in bus lanes during their hours of operation, with eight in ten (81%) saying that they never do this. Younger respondents were more likely to drive in bus lanes (17% of under 34s vs. 4% of those aged 35+), and based on small base sizes, men appear more likely than women to do so (13% compared with 4%).

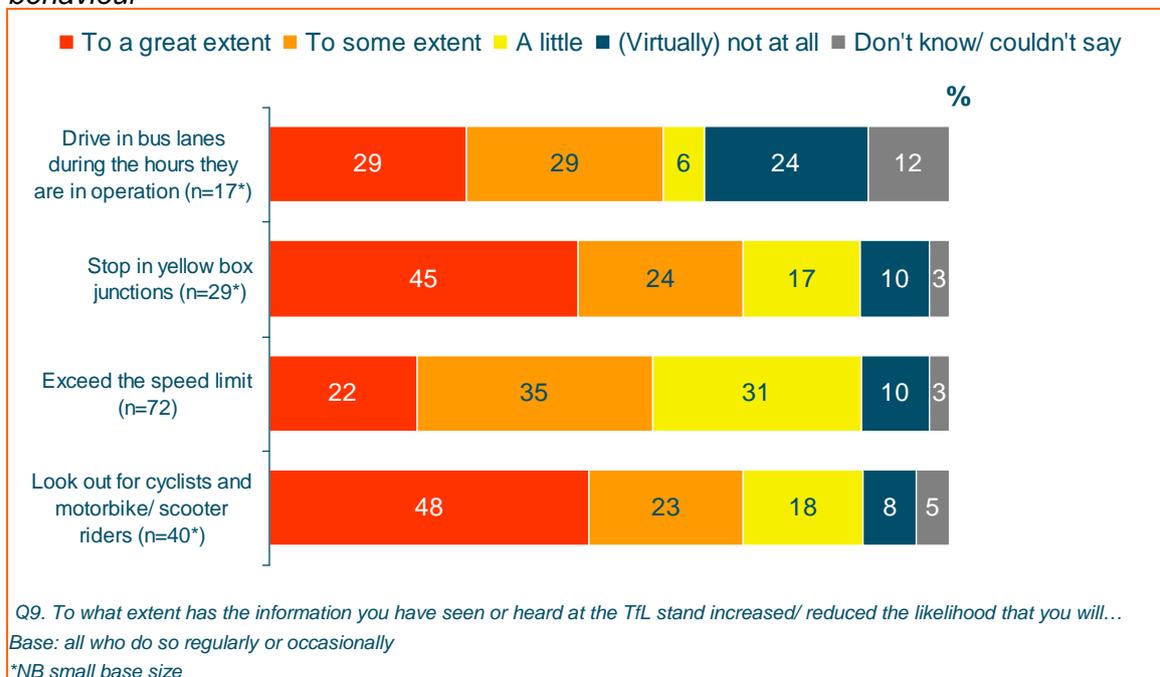
Around one in five drivers (18%) admit to stopping in yellow box junctions, with just under three quarters (72%) saying that they virtually or never do so. There are no significant differences between subgroups.

A greater proportion of drivers admit to exceeding the speed limit, with one in ten doing so regularly and 37% occasionally.

Around a quarter of drivers (26%) say they sometimes fail to look out for cyclists and motorbike or scooter riders, with a further two thirds (66%) saying they never do so.

Chart 9 shows the perceived impact of the TfL stand on driving behaviours, among those who carry out each behaviour regularly or occasionally. These results should be treated with caution due to small base sizes (particularly for driving in bus lanes and stopping in yellow box junctions).

Chart 9: Extent that information at TfL stand has increased/ reduced likelihood of behaviour



Among the very small number (17 individuals) who drive in bus lanes, six in ten (58%) feel that the information at the stand has reduced the likelihood of them doing so in the future 'to a great extent' or 'some extent'.

Of the 29 drivers who admitted that they stop in yellow box junctions, seven in ten (69%) say that the likelihood of doing this in the future has decreased to a great extent or some extent.

Almost three fifths (57%) of those who exceed the speed limit feel that the information has reduced the likelihood of this to a great extent/ some extent, and for those who

sometimes fail to look out for cyclists, seven in ten (71%) say that the information has made them more likely to do so.

3.4 Act On C02 Greener Driving Pavilion

Although the main focus of the research was to assess the 'Know about Safer and Smarter driving' stand, a small number of questions were included about TfL's stand in the Act On C02 Greener Driving Pavilion.

Around a third of visitors (36%) had also been to the Act On C02 stand. Almost nine in ten (87%) of these recalled seeing new information about how TfL are contributing to reducing C02 emissions in London.

4.1 Profile

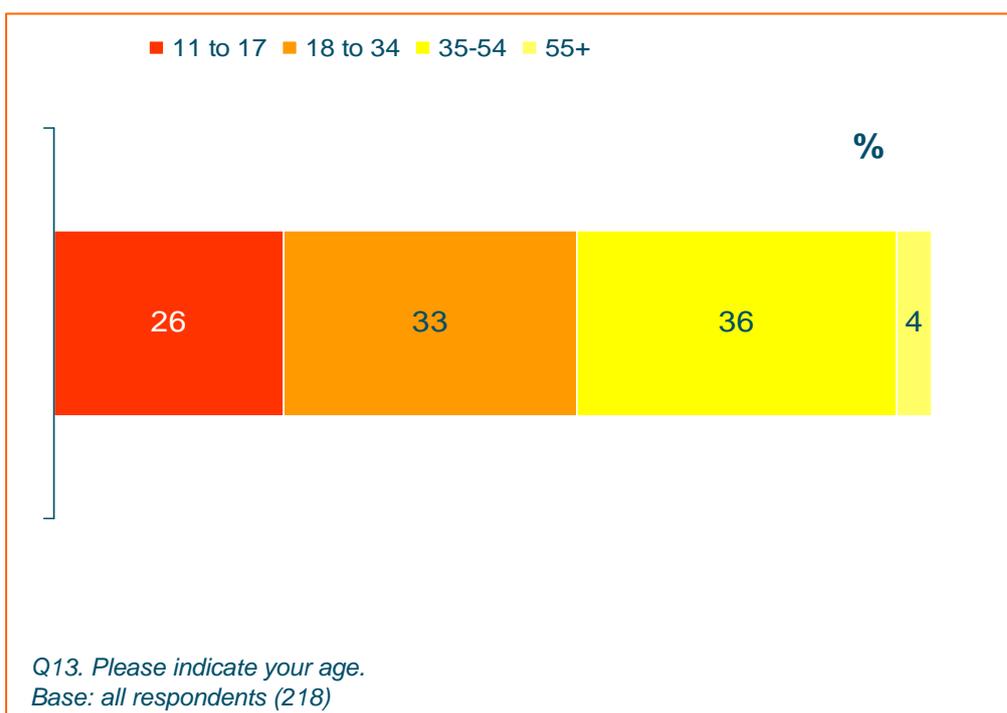
Two thirds of visitors (67%) were male, and the remaining third were female (31%).

Chart 10: Gender



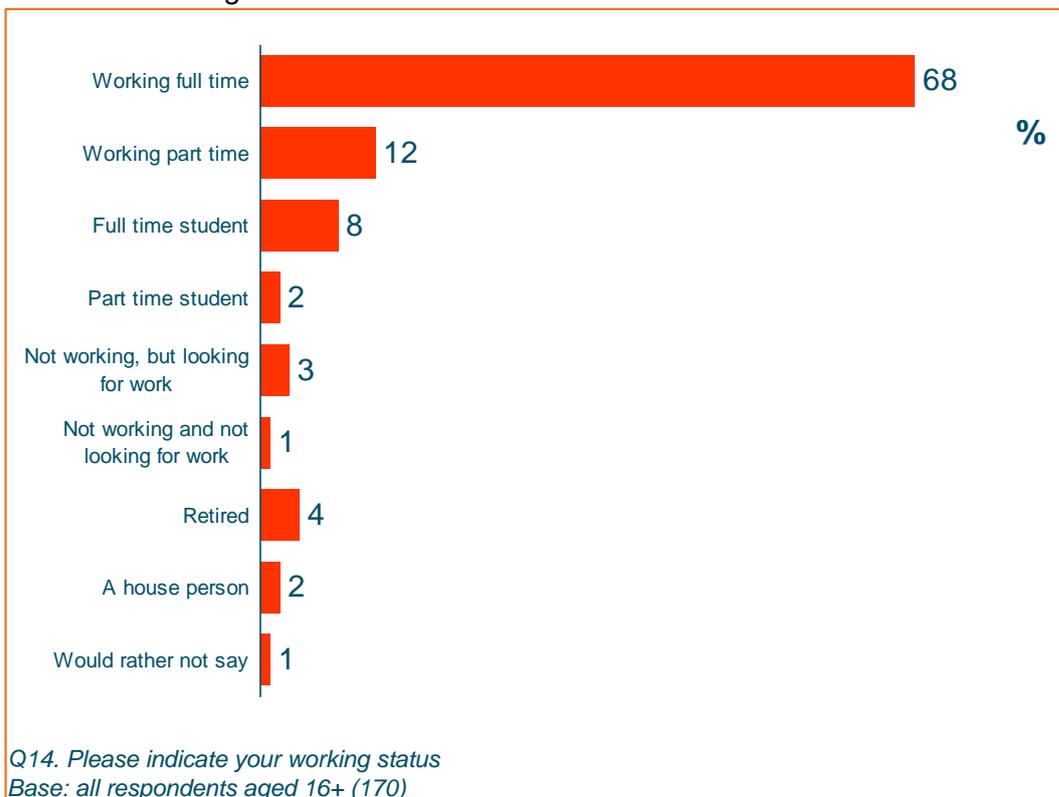
A quarter of visitors (26%) were under 18, with around a third (33%) aged 18 to 34 and a further third (36%) aged 35 to 54.

Chart 11: Age



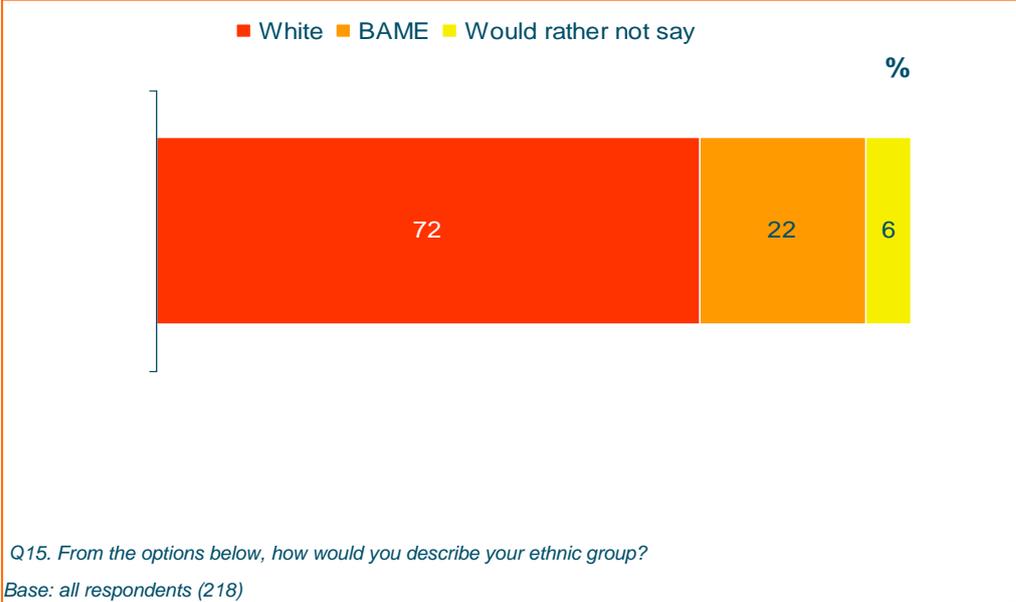
Eight in ten visitors were in employment, with 68% working full time and 12% working part time.

Chart 12: Working Status



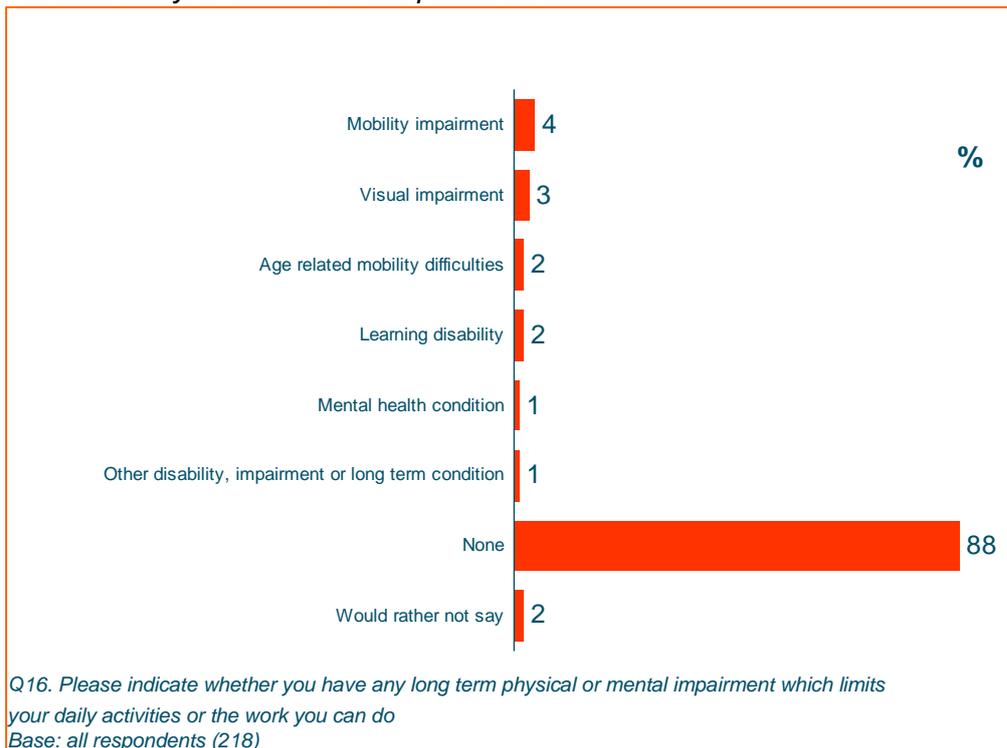
Around seven in ten visitors (72%) were from White ethnic backgrounds, whereas around one in five (22%) were from BAME groups.

Chart 12: Ethnic Origin



The large majority of visitors (88%) did not have a long term physical or mental impairment.

Chart 16: Physical or mental impairments



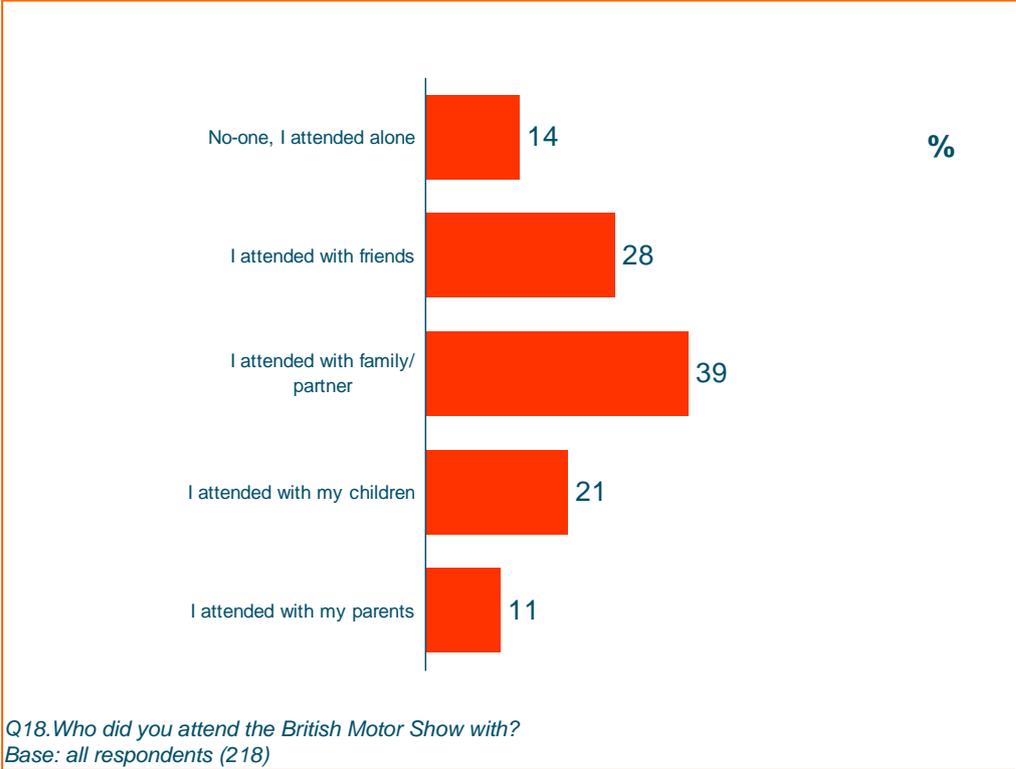
Nine in ten visitors (90%) were not currently a member of a car club or lift share scheme.

Chart 17: Whether currently a member of a car club or part of a lift share scheme



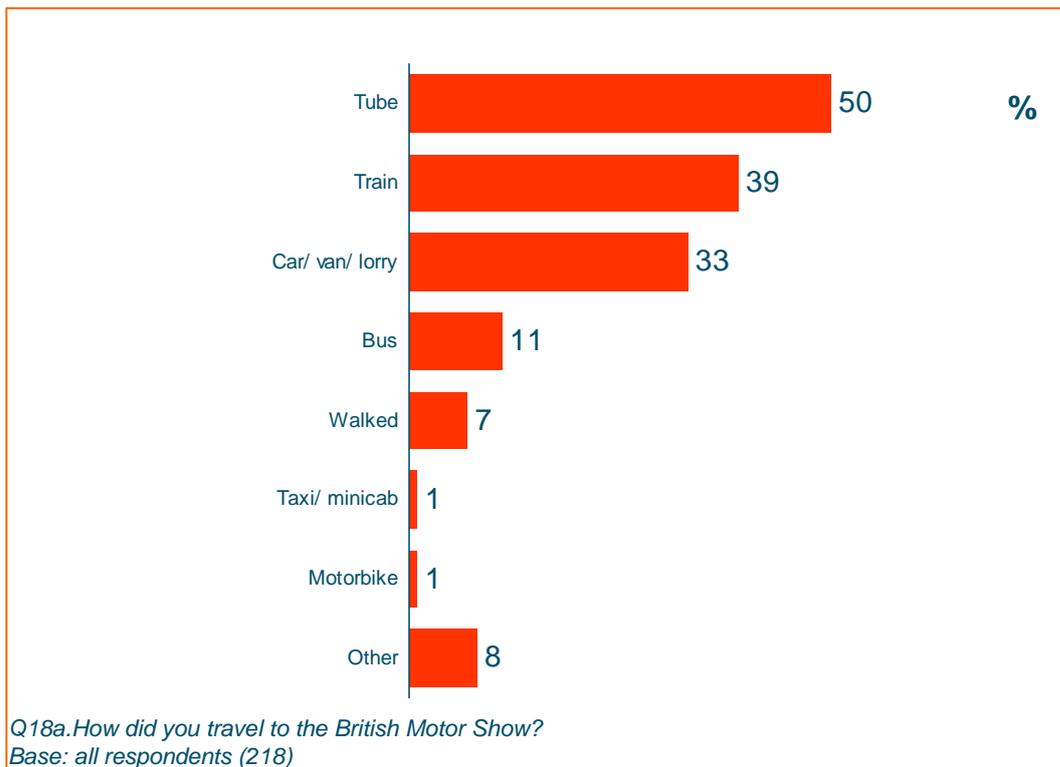
Two fifths of visitors attended the British Motor Show with their family or partner (39%), with 28% attending with friends and one fifth (21%) attending with their children.

Chart 18: Who attended the British Motor Show with



The most common modes of travel to the event were tube (50%), train (39%) and car (33%).

Chart 19: Mode of transport used



The majority of visitors came from either London (45%) or the South East (21%).

Chart 20: Area of residence

