

TLRN User Satisfaction

10103

Autumn 2012

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Prepared by: TNS

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Executive Summary

Satisfaction with the Transport for London Road Network (TLRN) has increased significantly from 75 to 76 out of 100, continuing the upward trend since 2010 when the score was 72.

Scores increased for all TLRN vehicle drivers and passengers, but not for cyclists or pedestrians. Satisfaction among pedestrians has dropped back to 2010 levels, following a significant increase for all measures in 2011. Cyclists' satisfaction has not changed since 2011. Satisfaction among commercial/taxi/emergency vehicle drivers show the largest increases.

Apart from street lighting and drainage, satisfaction with all the individual measures of the TLRN have improved significantly since 2011, for the second year running. The largest increases were for information-related measures (road signs warning of delays/ disruption and up to the minute information), traffic congestion, road surface condition and management of roadworks.

As in 2011, traffic congestion is the main issue: it is a key driver of satisfaction, but with the lowest satisfaction scores.

Just over one in ten London TLRN users were aware of Report IT, with over 40% of these having used it. The majority thought the tool to be useful.

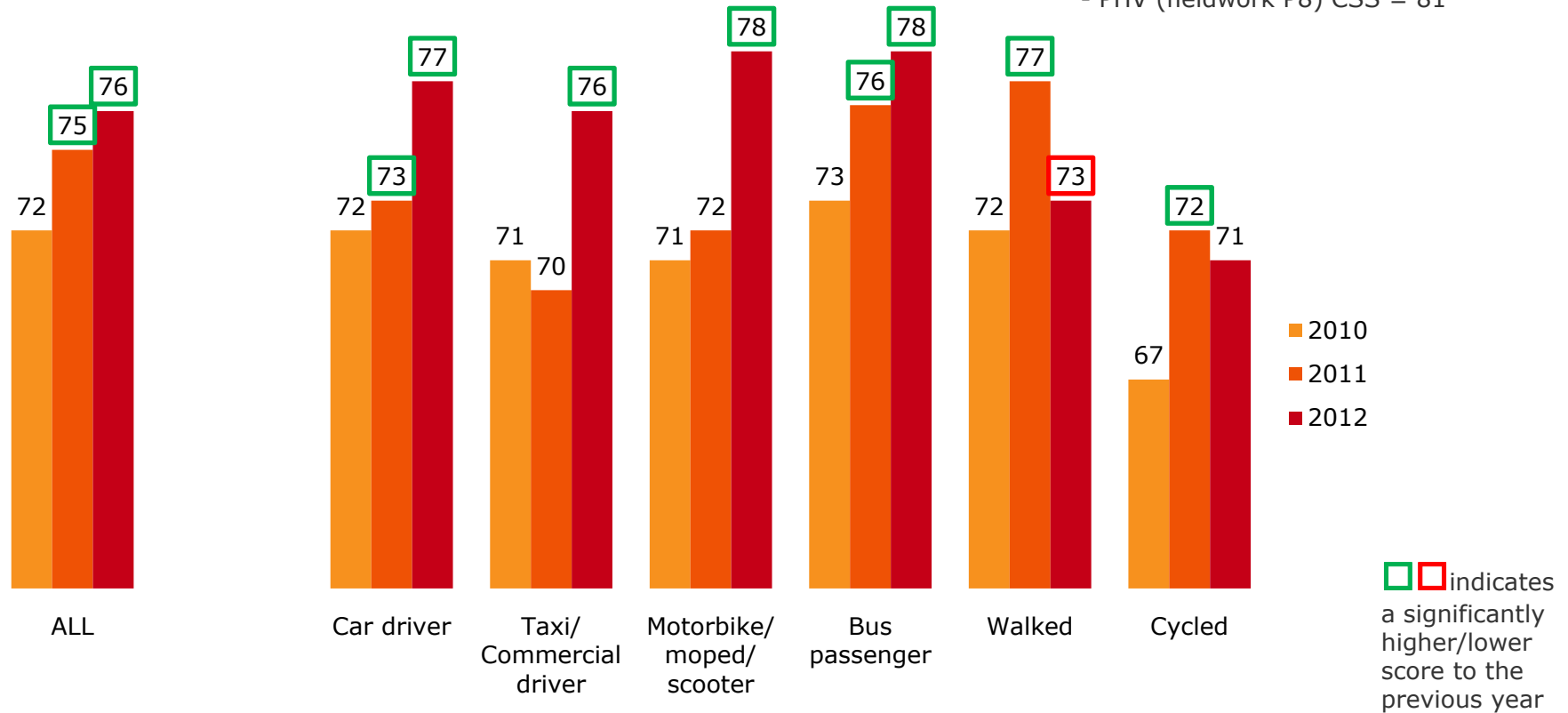
Reasons for a dislike of roadworks focussed around no-one seemingly working on them, roadworks taking place during busy times, works taking too long to complete and repeated works taking place on the same stretch of road, with over half of TLRN users finding each of these frustrating.

Using travel information has a significant impact on satisfaction. Among those who **always** check traffic conditions before setting out, overall satisfaction with the journey and satisfaction for almost every measure is significantly higher than for those who check less frequently.

Overall satisfaction for TLRN users increased significantly in 2012. The largest increases were among taxi/commercial vehicle drivers, motorbike/scooter/moped drivers and car drivers. Bus passenger satisfaction also increased significantly. There was no change in cyclists satisfaction, but a significant decline for pedestrians.

Comparable overall satisfaction scores from CSS 2012/13

- Bus Services Q2 CSS = 82
- Underground Q2 CSS = 83
- Black Cab 2012 (fieldwork P8) CSS = 85
- PHV (fieldwork P8) CSS = 81





Overall satisfaction (mean scores) By mode

Base in 2012: All trips - (8270), car drivers (3096), taxi/commercial vehicles (432), motorbikes/mopeds/scooters (319), bus passengers (2083), pedestrians (1775), cyclists (565)

Satisfaction with most individual measures increased significantly this year, continuing last year's upward trend. The measures which are specific to taxi/commercial drivers have improved the most. However, the pedestrian-specific measures all declined in 2012 compared to 2011, but satisfaction is still higher than in 2010.

2010	2011		2012		
75	77	↑	78	↑	working condition of the traffic lights
75	77	↑	77		street lighting
74	77	↑	77		roads are well drained and free from water & flooding
73	75	↑	76	↑	condition and clarity of road markings
73	75	↑	76	↑	amount and clarity of road signs giving route directions
72	75	↑	76	↑	OVERALL SATISFACTION
69	72	↑	75	↑	amount and clarity of road signs about delays and disruptions
70	73	↑	74	↑	could estimate accurately how long your journey would take
69	72	↑	74	↑	speed
68	72	↑	74	↑	up-to-the-minute information
70	73	↑	73	↑	traffic light timings
69	72	↑	73	↑	speed of response for fixing unusual traffic problems
68	70	↑	73	↑	condition of road surfaces
67	70	↑	73	↑	management of road works
63	67	↑	69	↑	traffic congestion
63	63		70	↑	COMMERCIAL VEHICLE: time of day allowed to stop in loading bay
61	62		70	↑	COMMERCIAL VEHICLE: time allowed to pick up and drop off in loading bay
63	66	↑	65		CYCLIST: availability of cycle lanes and advance stop lines
61	64	↑	64		CYCLIST: condition of cycle lanes
73	78	↑	75	↓	PEDESTRIAN: pavements, pedestrian crossings & subways free from water/flooding
72	76	↑	73	↓	PEDESTRIAN: condition of lamp posts bollards & seating
71	75	↑	73	↓	PEDESTRIAN: you can move around easily on foot
71	75	↑	72	↓	PEDESTRIAN: ease of crossing side roads
70	74	↑	71	↓	PEDESTRIAN: pedestrian crossings where you need them
68	73	↑	69	↓	PEDESTRIAN: ease of crossing main roads
66	71	↑	68	↓	PEDESTRIAN: condition of pavements

 Indicates a significant increase from the previous year
 Indicates a significant decrease from the previous year

Satisfaction with different aspects (mean scores)

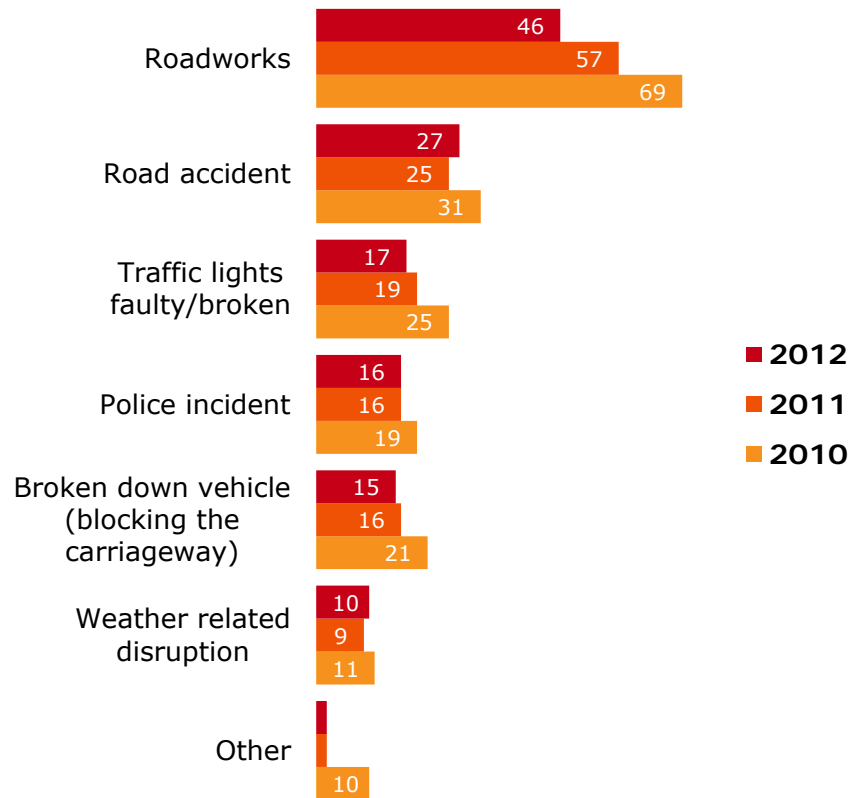
Base in 2012: All trips – (8270), cyclists (565), pedestrians (1775), commercial vehicles/taxis (432)

Transport for London

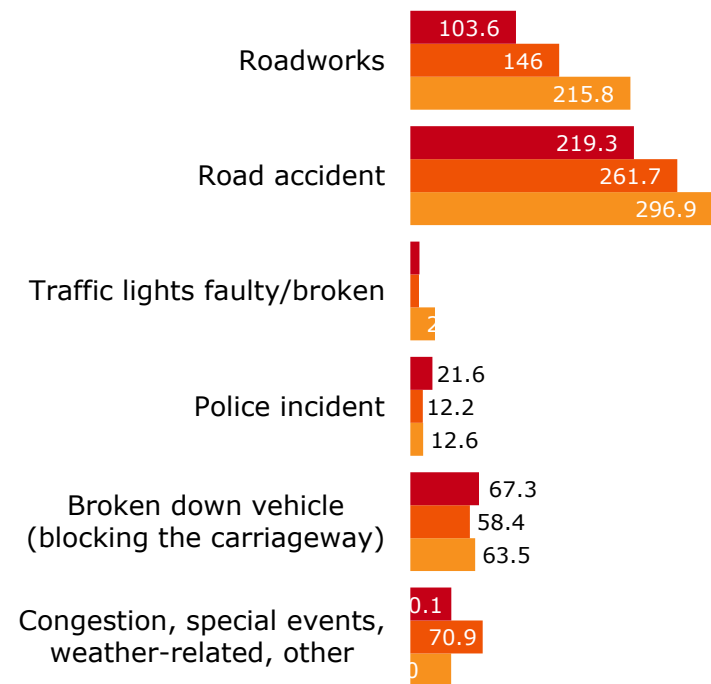


In the TLRN survey, the level of disruption experienced by London residents in the last 3 months was similar to that of previous years, with roadworks remaining the main cause of disruption (although declining). In terms of performance data, road accidents were the main cause of disruption.

TLRN survey – LONDON RESIDENTS
(% experienced it in last 3 months)



NETWORK PERFORMANCE DATA FROM TLRN
(Absolute figures for hours of serious and severe disruption)



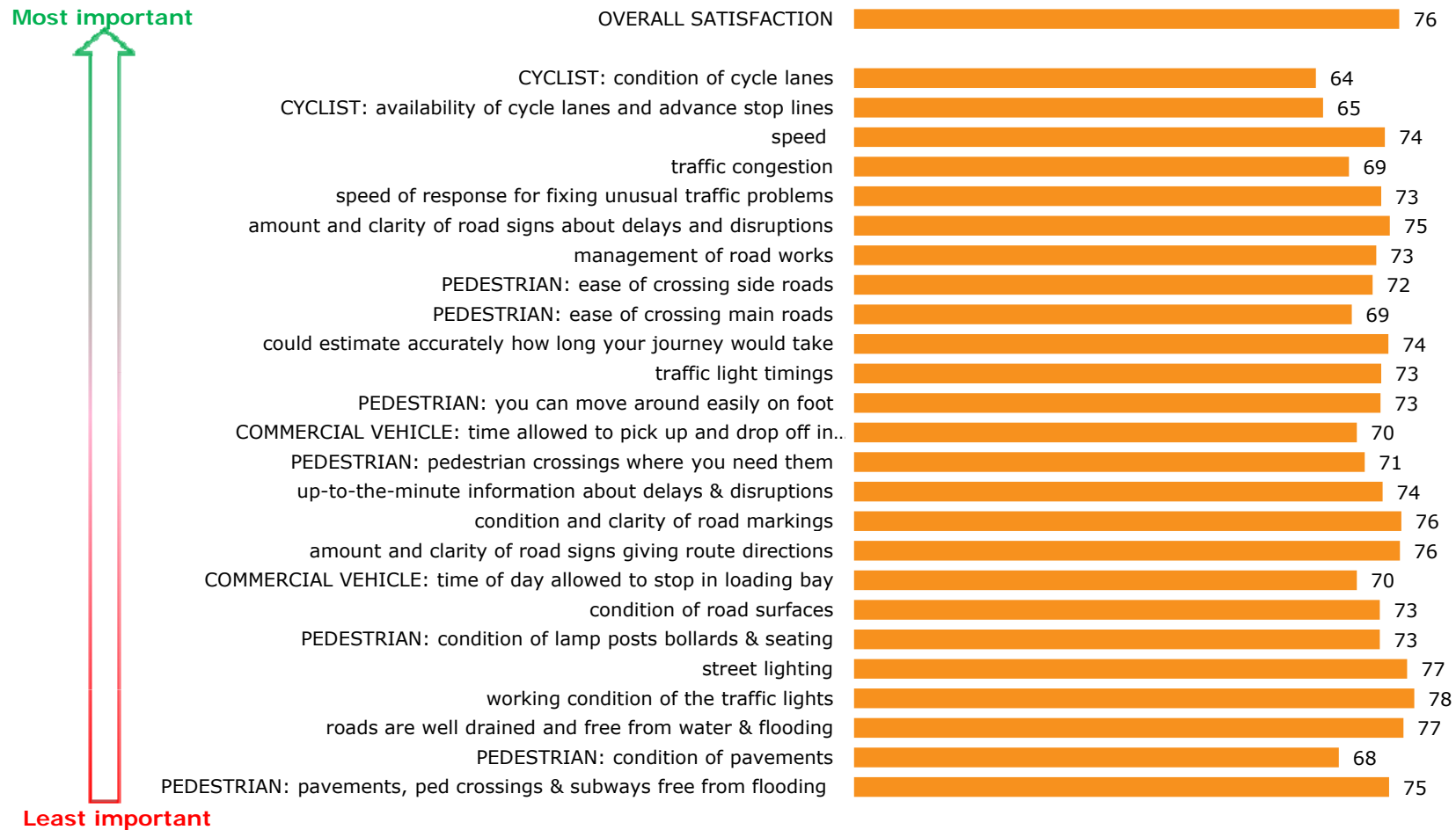
Type of disruption on TLRN experienced in last 3 months
London residents

Base in 2012: All London residents (3222)

Network Performance data based on Periods 5 – 8 for each year

The key drivers of satisfaction across all TLRN users (indicated by the rank order of the measures rather than the scores) were speed, traffic congestion, traffic light timings and road signs showing delays/disruption. For cyclists, the availability and condition of cycle lanes were also key drivers.

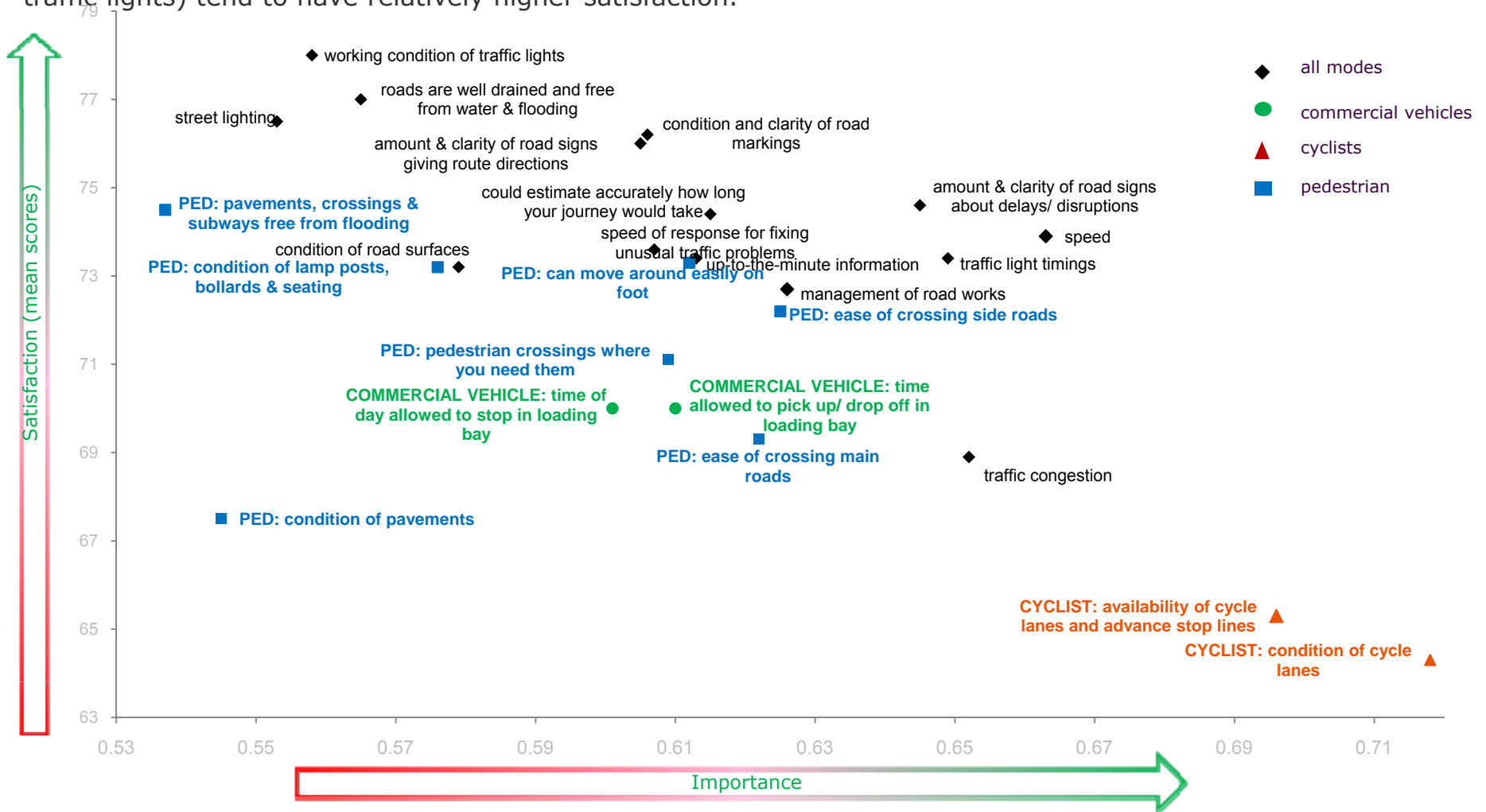
Satisfaction scores are shown on the bars but measures are ranked in order of 'importance', most important at the top. (Importance is not asked in the survey, but derived from the satisfaction scores).



What drives overall satisfaction in 2012? (mean scores)

Base: All trips – (8270), cyclists (565), pedestrians (1775), commercial vehicles/taxis (432)

Traffic congestion stands out as a measure which is highly important to TLRN users, but with the lowest satisfaction (apart from certain mode-specific measures for pedestrians and cyclists). Other important measures such as speed, signs about delays/disruptions and traffic light timings have slightly lower than average satisfaction scores, whereas the less important measures (e.g. street lighting, working condition of traffic lights) tend to have relatively higher satisfaction.



What drives overall satisfaction in 2012?

Base: All trips – (8270), cyclists (565), pedestrians (1775), commercial vehicles/taxis (432)

2

Satisfaction – by mode

Trip based data



Bus passengers and car drivers were the most satisfied groups of TLRN users, with higher-than-average satisfaction for most measures. Cyclists (and to lesser extent, pedestrians), remained the least satisfied. Across all modes, traffic congestion had the lowest satisfaction, although for cyclists, road surface condition, cycle lane condition and cycle lane availability had equally low scores.

taxi/ commercial delivery emergency service vehicle driver	motorbike scooter Moped	cyclist	bus passenger	car driver	pedestrian	
						Red to green shading = low to high satisfaction scores
						Blue figures = significantly LOWER than average satisfaction score
						White figures = significantly HIGHER than average satisfaction score
76	78	71	78	77	73	OVERALL SATISFACTION
75	75	74	80	80	77	working condition of the traffic lights
75	75	73	79	79	75	street lighting
73	76	70	79	79	74	roads are well drained and free from water & flooding
75	75	72	78	78	74	condition and clarity of road markings
74	74	71	78	78	74	amount and clarity of road signs giving route directions
71	73	70	75	75	71	traffic light timings
72	74	74	74	74	76	could estimate accurately how long your journey would take
71	74	72	74	74	76	speed
70	74	68	77	75	71	speed of response for fixing unusual traffic problems
72	74	70	76	74	71	up-to-the-minute information
69	73	69	75	74	70	management of road works
67	72	65	70	70	67	traffic congestion
71	73	71	76	75	-	amount and clarity of road signs about delays and disruptions
70	71	65	76	74	-	condition of road surfaces
70	-	-	-	-	-	COMMERCIAL VEHICLE: time of day allowed to stop in loading bay
70	-	-	-	-	-	COMMERCIAL VEHICLE: time allowed to pick up and drop off in loading bay-
-	-	65	-	-	-	CYCLIST: availability of cycle lanes and advance stop lines
-	-	64	-	-	-	CYCLIST: condition of cycle lanes
-	-	-	-	-	68	PEDESTRIAN: condition of pavements
-	-	-	-	-	69	PEDESTRIAN: ease of crossing main roads
-	-	-	-	-	71	PEDESTRIAN: pedestrian crossings where you need them
-	-	-	-	-	73	PEDESTRIAN: condition of lamp posts bollards & seating
-	-	-	-	-	73	PEDESTRIAN: you can move around easily on foot
-	-	-	-	-	72	PEDESTRIAN: ease of crossing side roads
-	-	-	-	-	75	PEDESTRIAN: pavements, pedestrian crossings & subways free from water/flooding

Satisfaction with different aspects (mean scores)

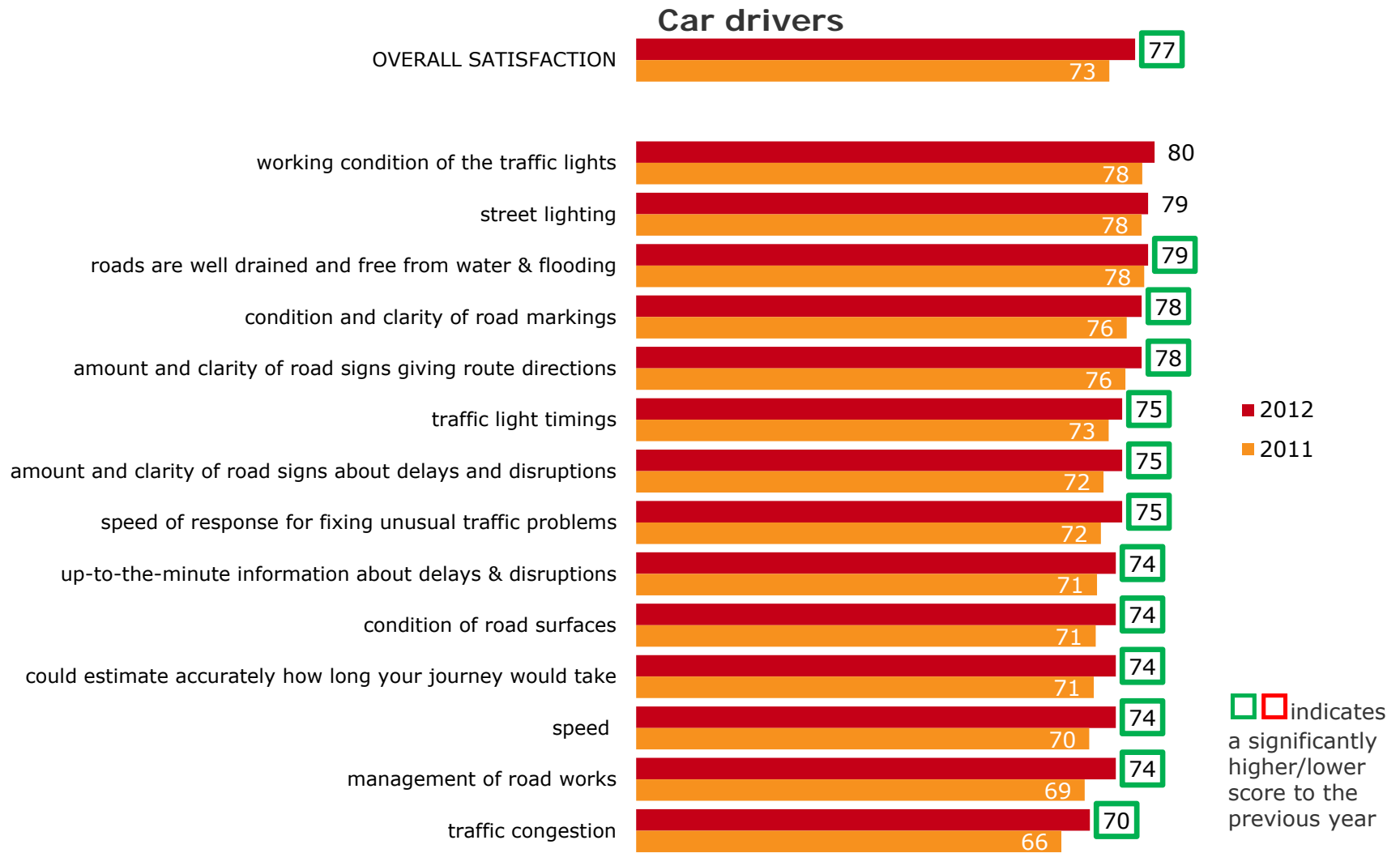
By mode

Base: All trips – (8270), car drivers (3096), taxi/commercial vehicles (432), motorbikes/mopeds/scooters (319), bus passengers (2083), pedestrians (1775), cyclists (565)

- Indicates the base size was too low to report



Among **car drivers**, all measures have increased since 2011, most of them significantly. Congestion was the lowest-scoring aspect for car drivers, despite increasing significantly since last year.

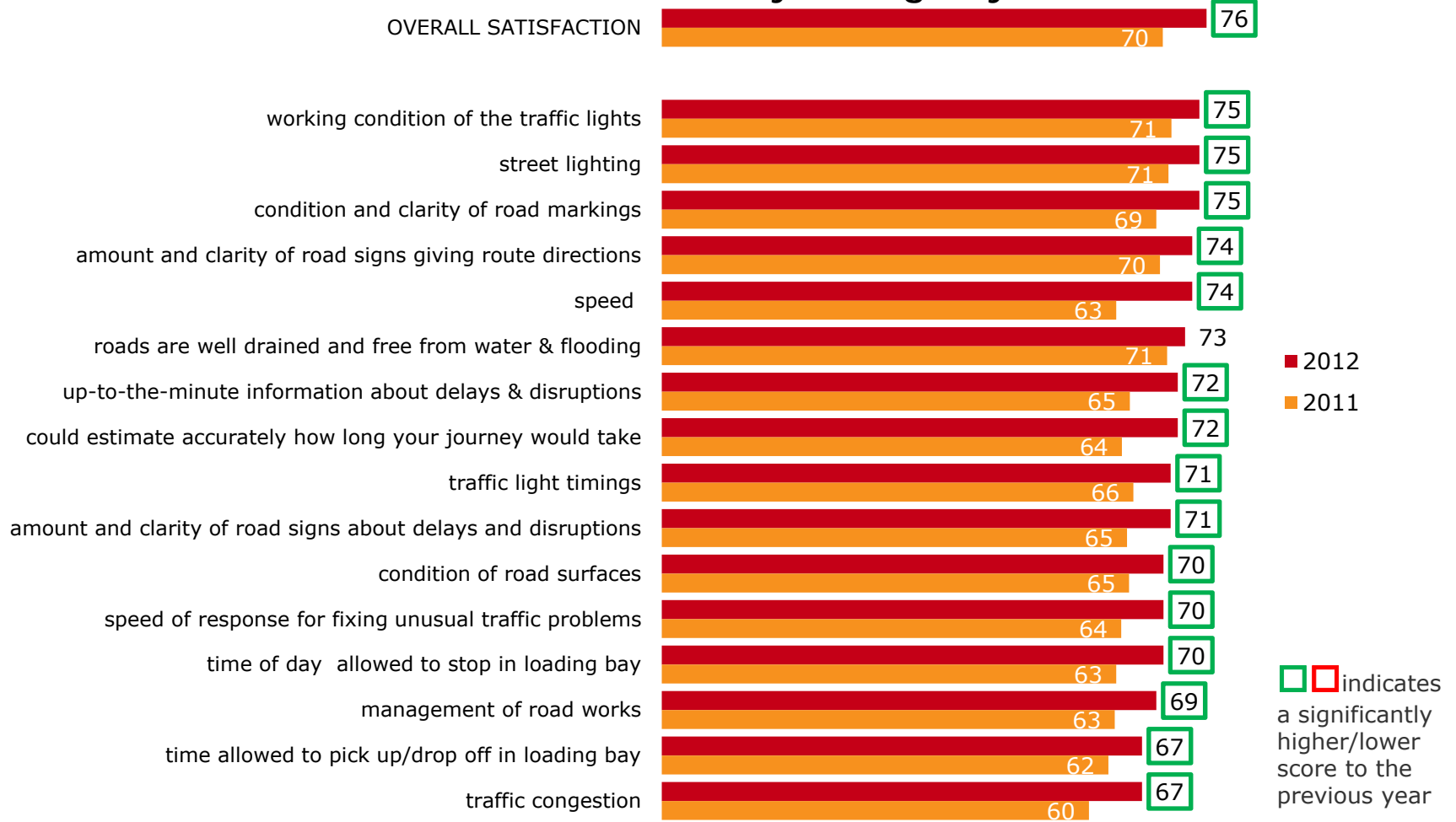


Satisfaction with different aspects (mean scores)
As car driver

Base in 2012: Trips by car drivers (3096)

For **Taxi/commercial/delivery/emergency vehicle drivers**, every measure increased significantly, with the exception of road drainage. The largest increases seen were for speed of journey and accurately estimating how long a journey would take. Traffic congestion and time allowed for picking up/dropping off in loading bay were still relative weaknesses, but significantly improved from last year.

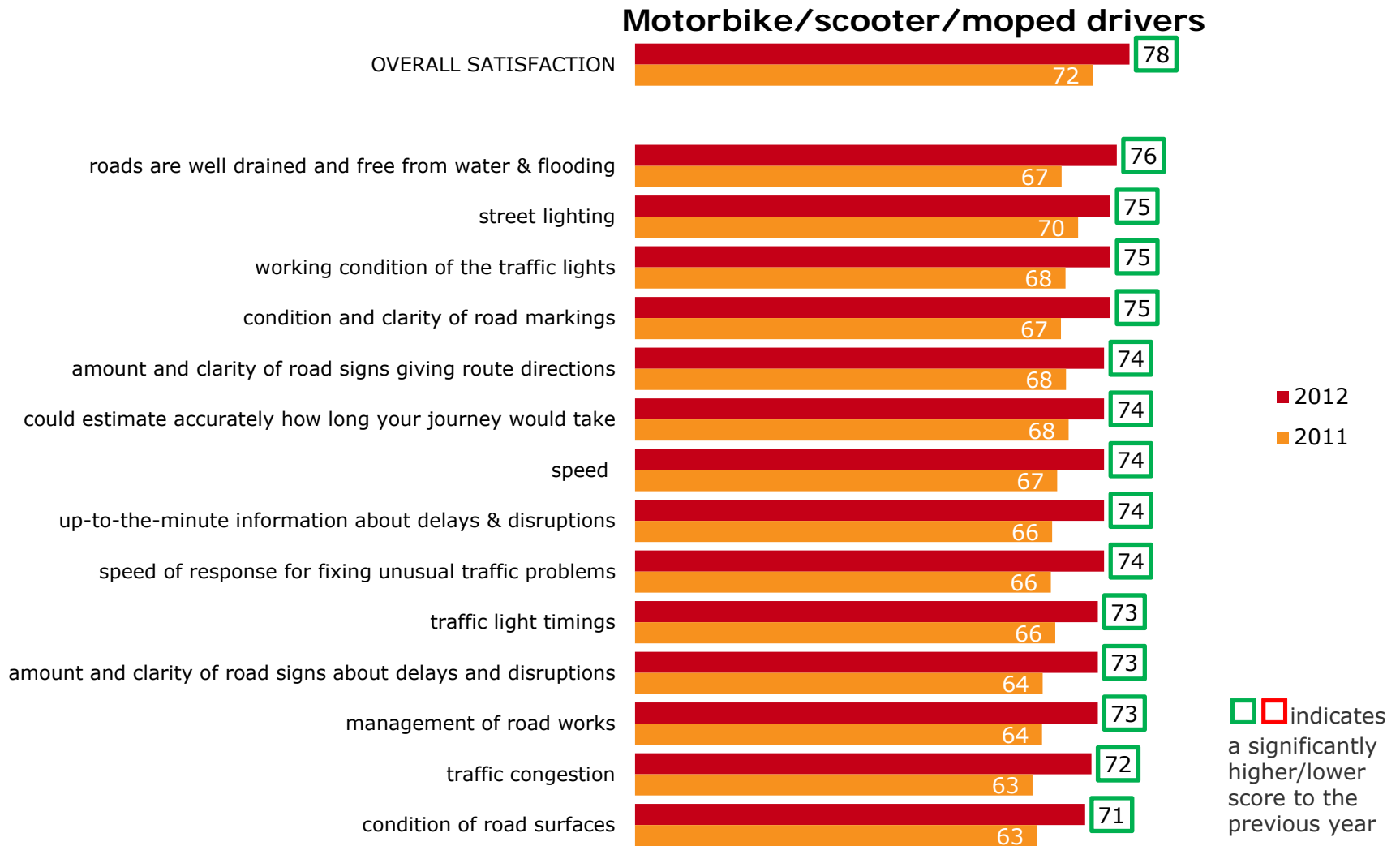
Taxi/commercial/delivery/emergency vehicle drivers



Satisfaction with different aspects (mean scores)
As Taxi/commercial/delivery/emergency vehicle driver

Base in 2012: Trips by taxi/commercial vehicles (432)

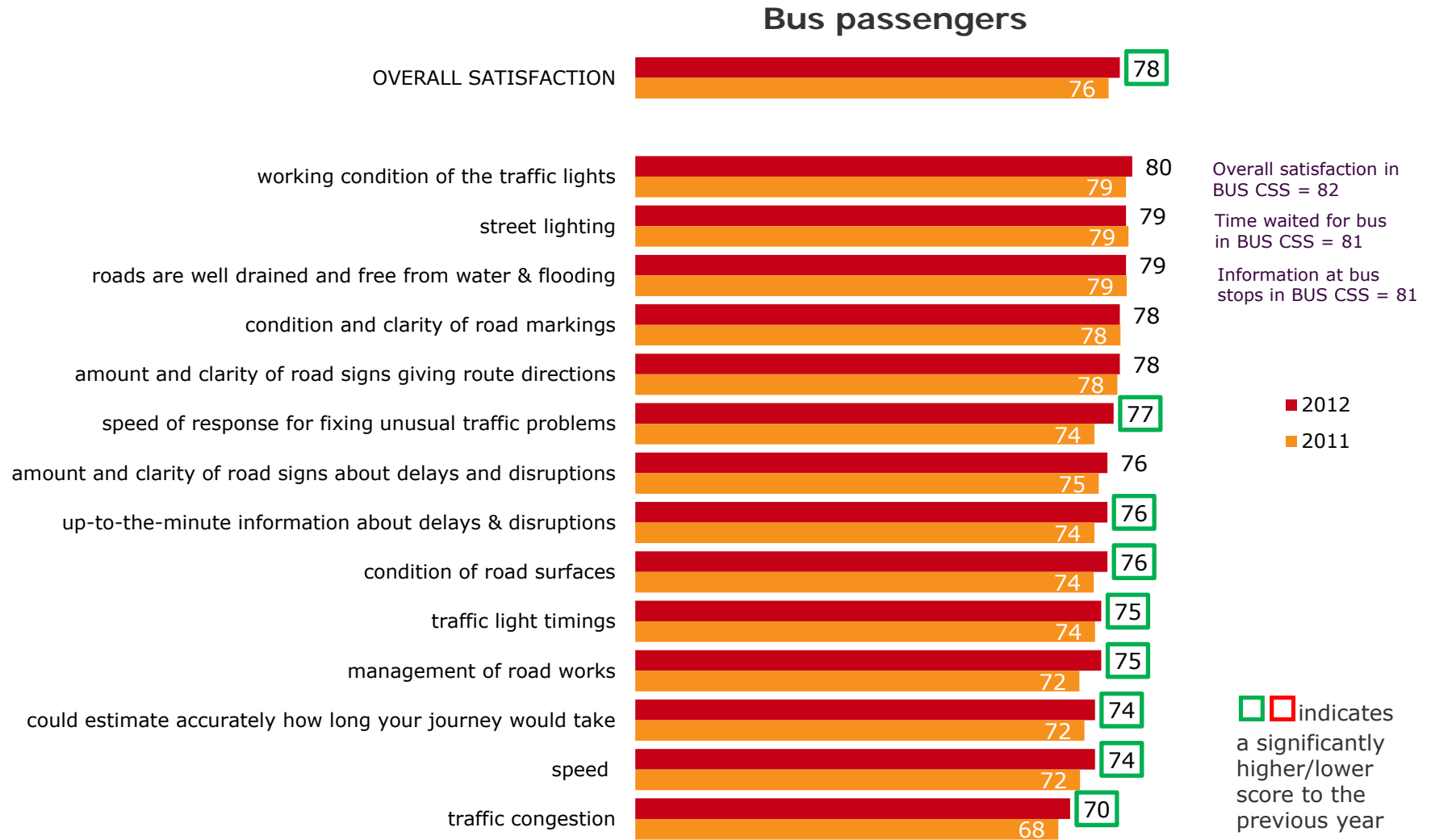
Overall satisfaction for **Motorbike/scooter/moped drivers** increased by six points since 2011 with every individual measure showing a significant increase. Traffic congestion and road drainage increased by nine points each.



Satisfaction with different aspects (mean scores)
As Motorbike/scooter/moped driver

Base in 2012: Trips by motorbikes/mopeds/scooters (319)

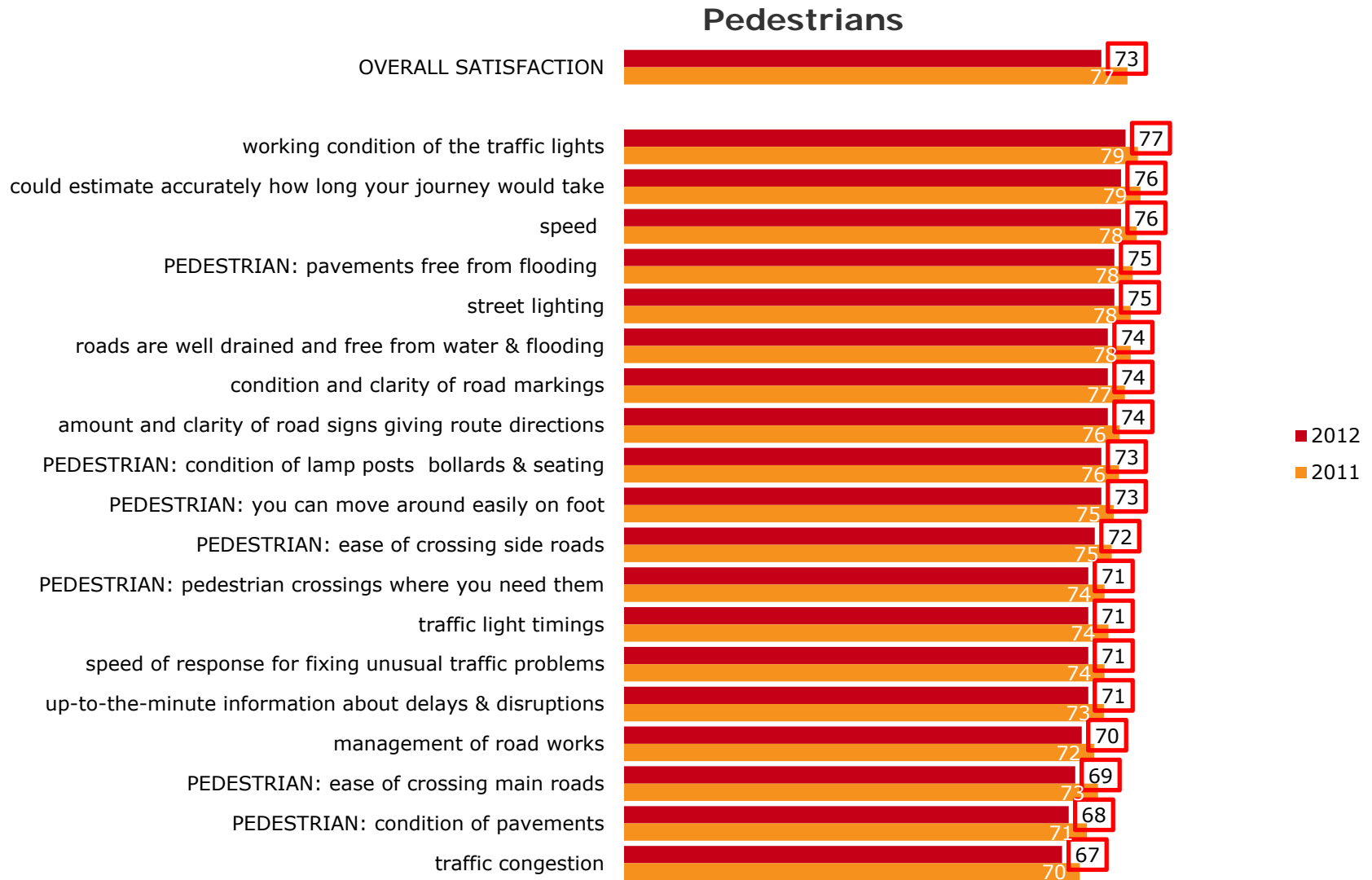
Overall satisfaction among **bus passengers** increased in 2012. Among the individual measures, there were significant increases for most of the lower-scoring aspects such as traffic congestion, speed and estimating journey length.



Satisfaction with different aspects (mean scores)
As bus passenger

Base in 2012: Trips by bus passengers (2083)

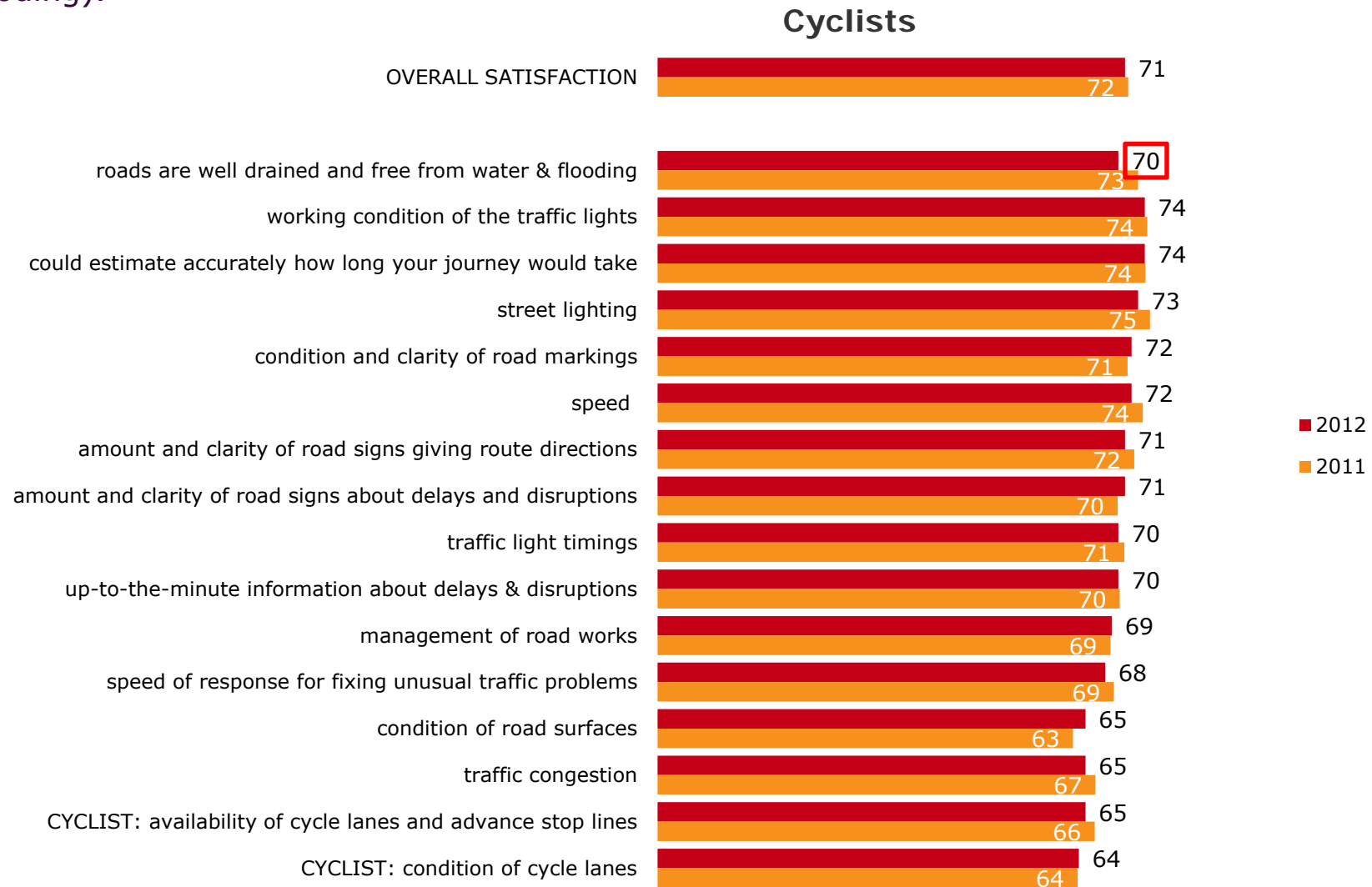
Overall satisfaction among **pedestrians** decreased significantly for all measures.



Satisfaction with different aspects (mean scores)
As pedestrian

Base in 2012: Trips by pedestrians (1775)

For **cyclists**, there was no significant change in scores for overall satisfaction in 2012, and only one significant change in the individual measures (roads are well-drained and free from flooding).



Satisfaction with different aspects (mean scores)
As cyclist

Base in 2012: Trips by cyclists (565)

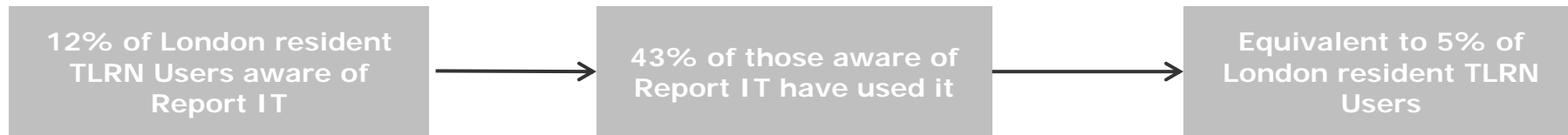
3

Use and opinion of traffic and travel information

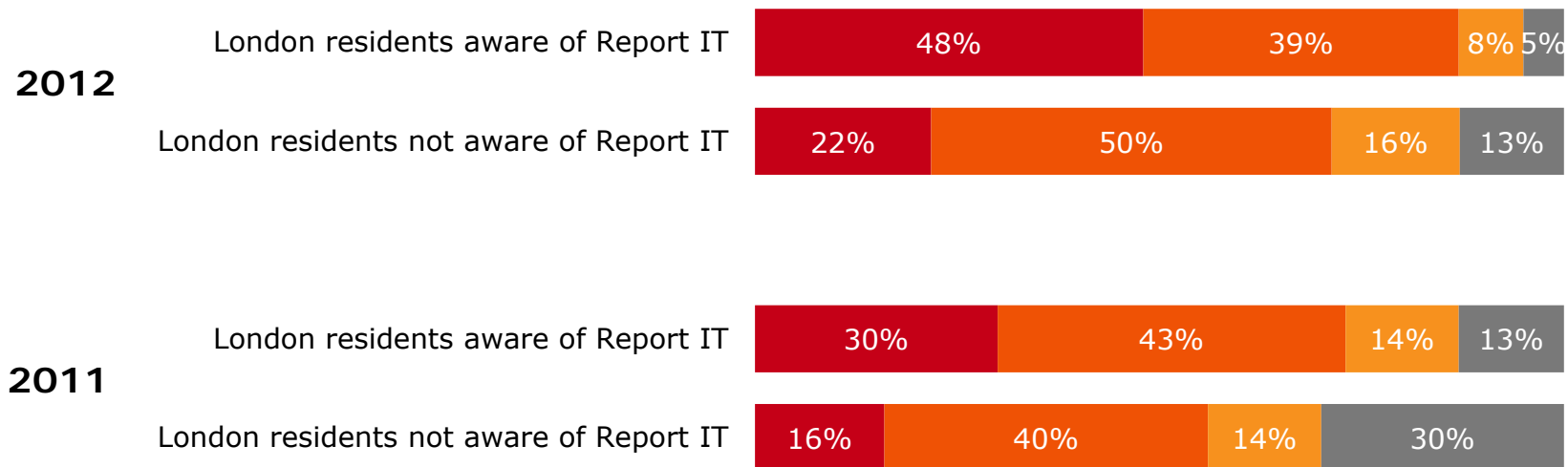
People based data



Among London residents, awareness of Report IT (TfL's online tool for reporting street faults and roadworks) increased from 9% in 2011 to 12% in 2012. Among those aware of Report IT, just under half (43%) had used it. All respondents were asked to rate usefulness (those who were previously unaware of Report IT were shown a brief description in the survey). Ratings improved since 2011 among both those who had heard of it and those who were previously unaware.



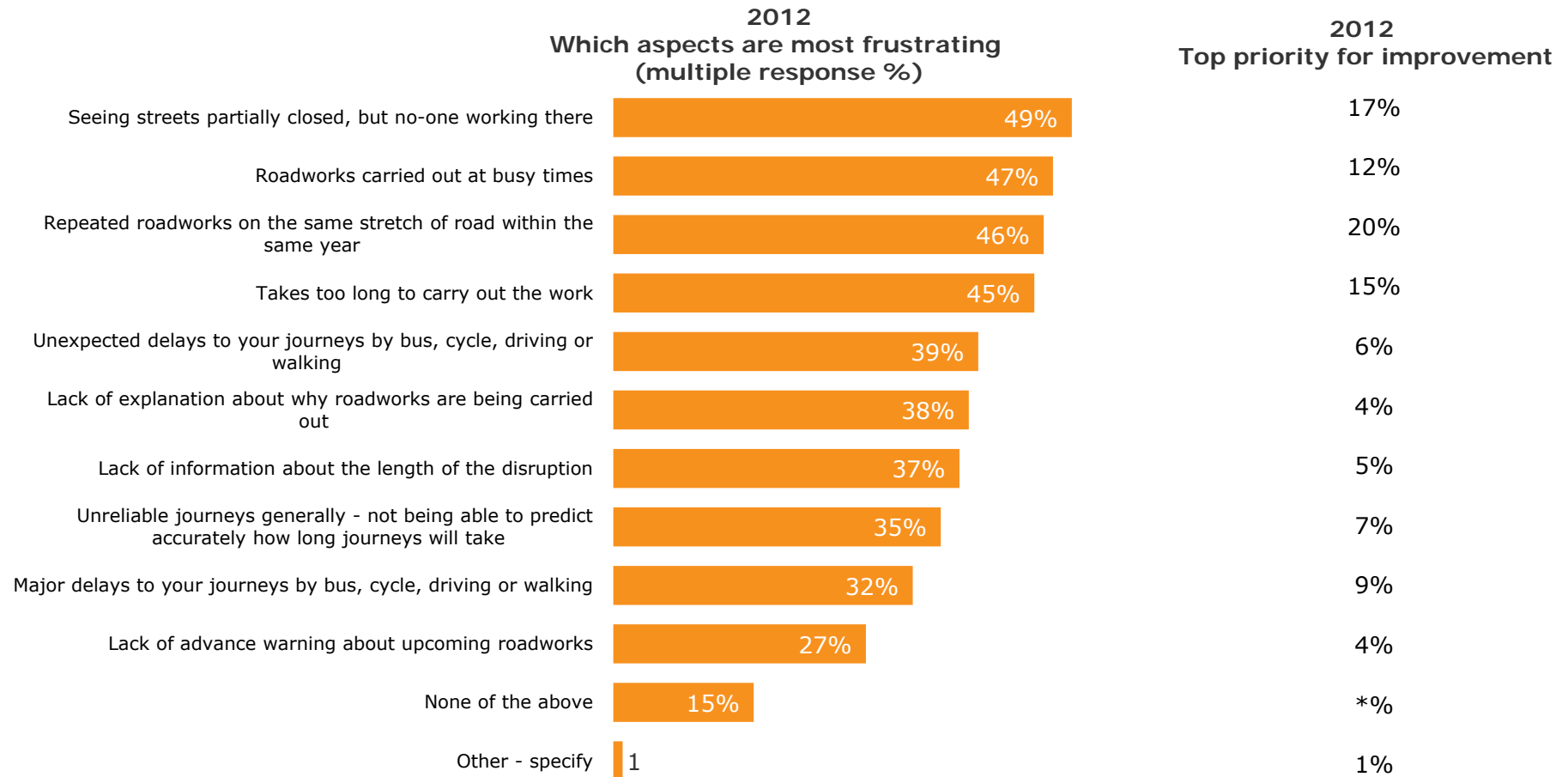
■ Frequently useful ■ Occasionally useful ■ Rarely useful ■ Don't know



Report IT

Base in 2012: London residents (3222), aware of Report IT (361)

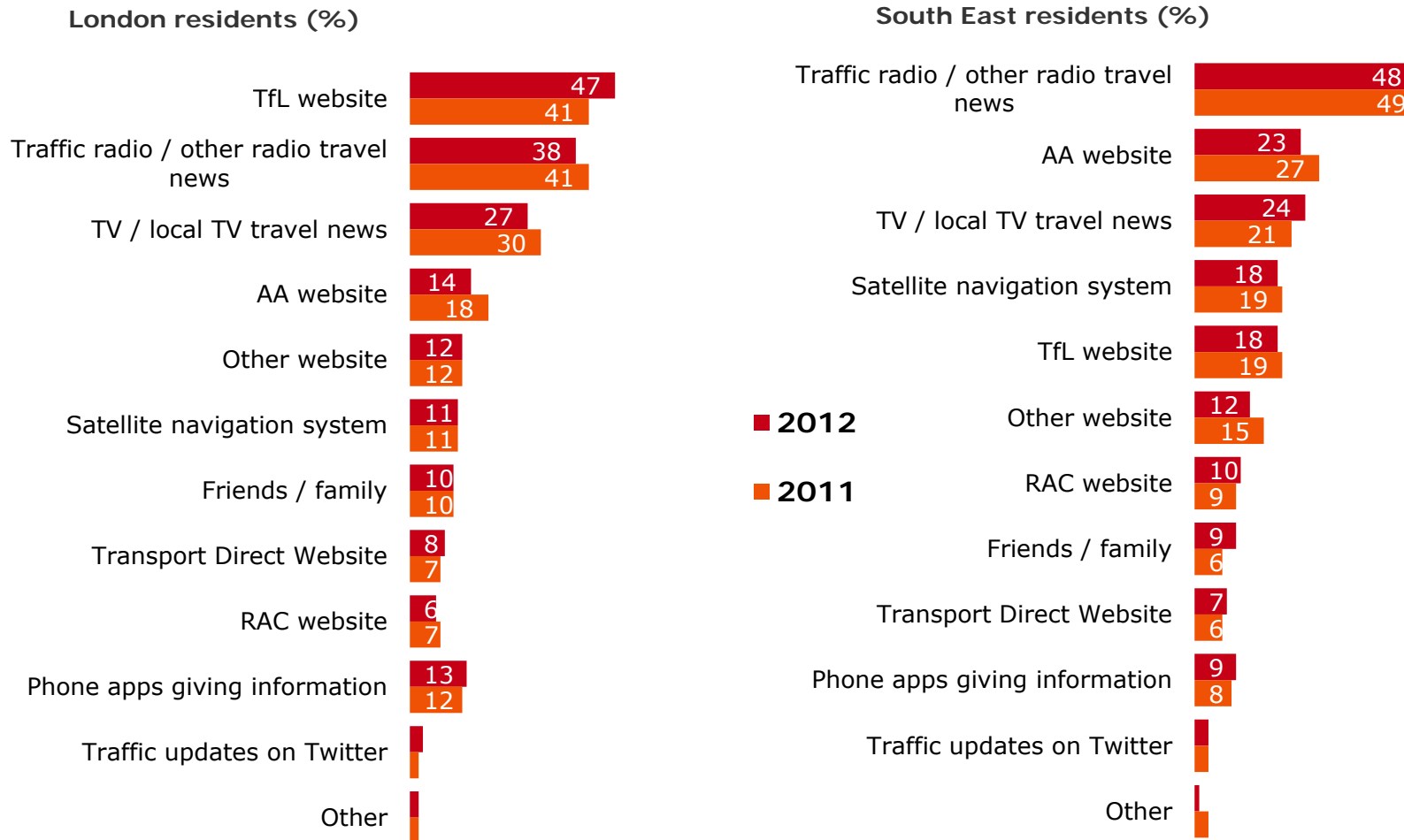
In 2012, the most frustrating aspects of roadworks for TLRN users were seeing closures with no-one working on site at the time, roadworks at busy times, repeated roadworks within the same year and roadworks taking too long to complete. Although not shown below, there was little difference since 2011.



Frustrations with roadworks 2012

Base in 2012: All residents – (3538)

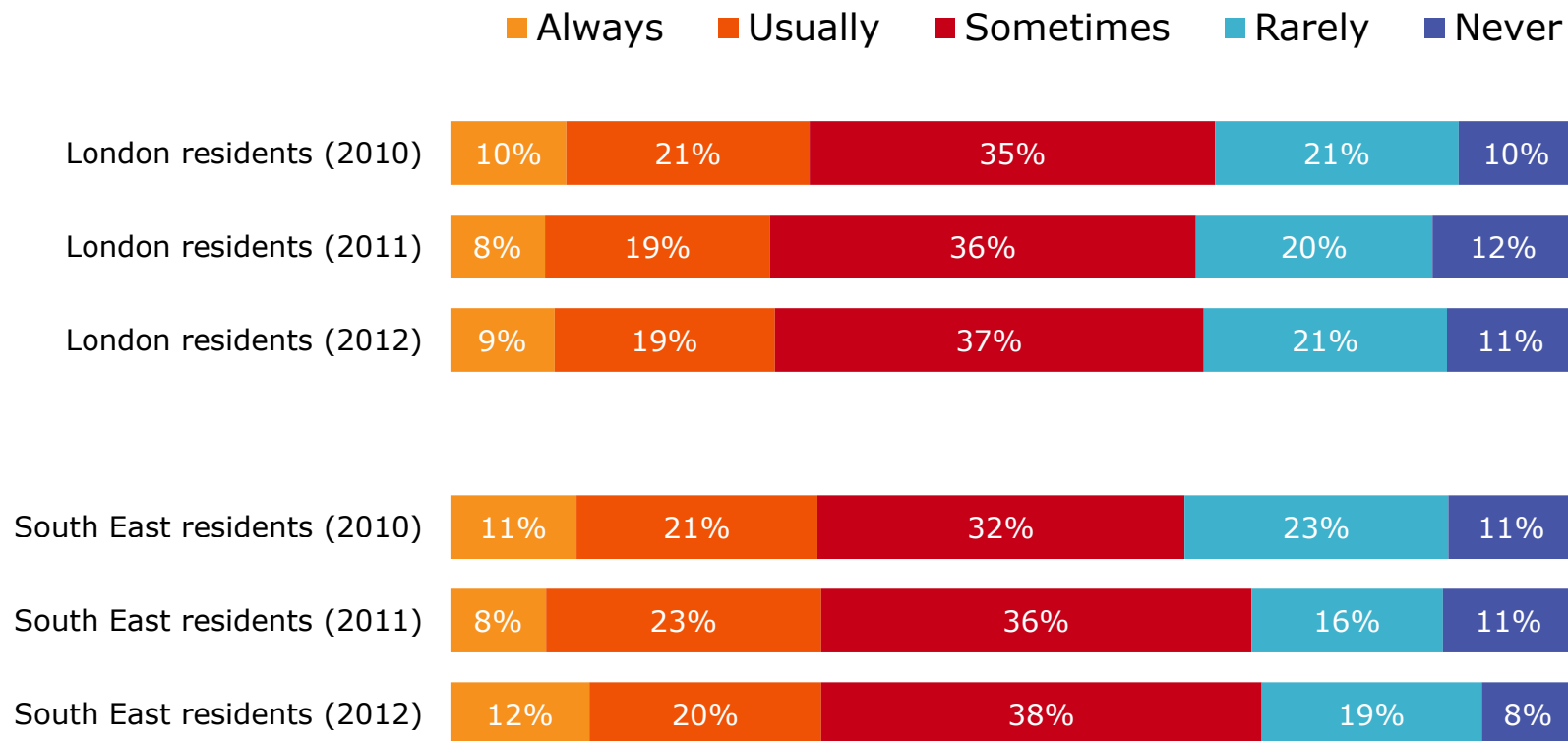
Comparing Londoners with South East residents, the TfL website was much more likely to be used by Londoners, with radio and TV as important secondary sources. However, South East residents showed a strong preference for radio travel reports over other sources.



Methods of checking traffic conditions

Base in 2012: All London residents (3222), South East residents (316)

Use of travel information to check traffic conditions varied widely among TLRN users. Nearly a third always/usually check conditions before setting out and a similar proportion rarely/never check. Over time, a similar pattern can be seen among Londoners, while slightly more variation can be seen among South East residents.

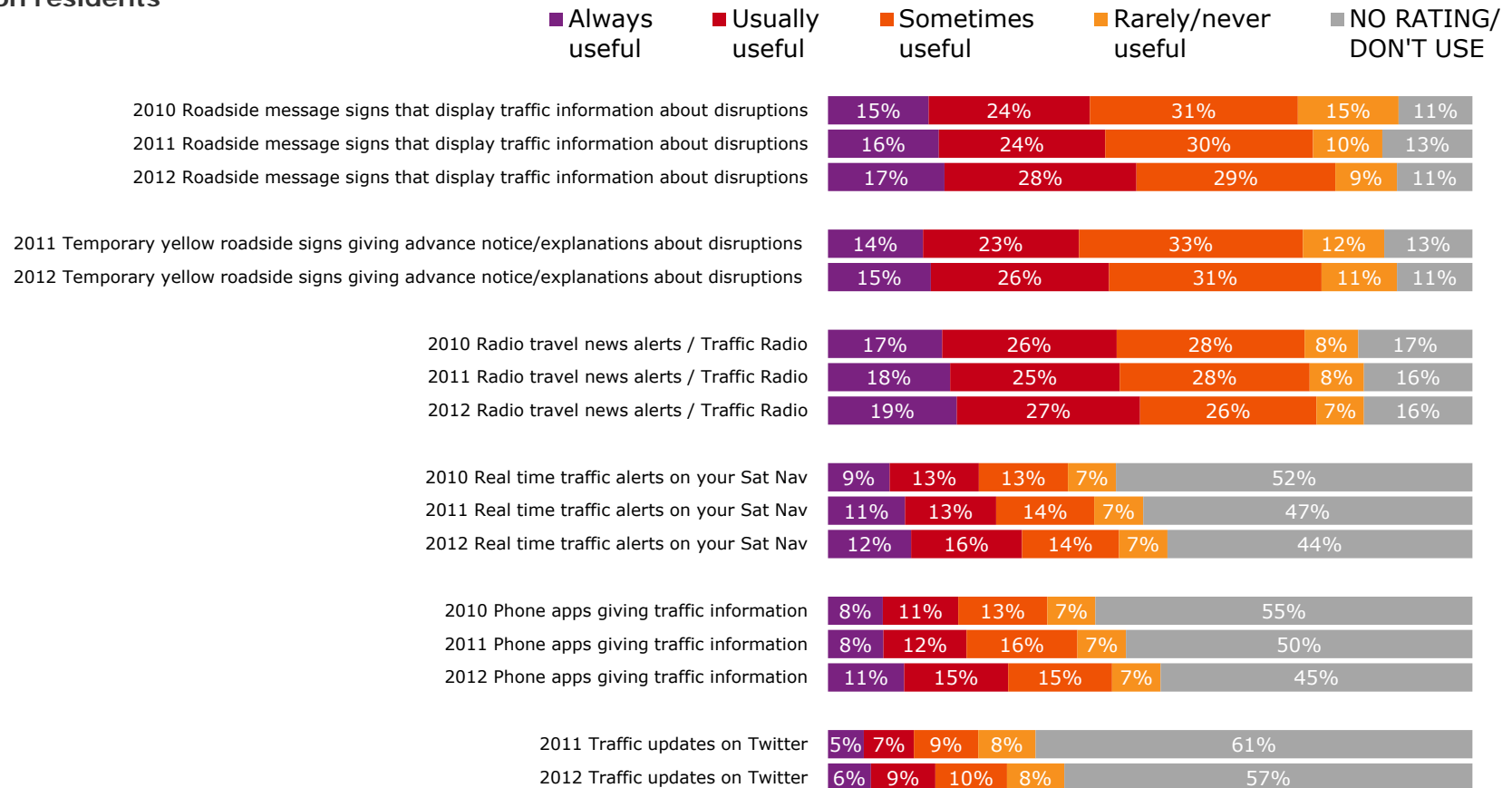


Frequency of checking traffic conditions

Base in 2012: All London residents (3222), all South East residents (316)

All London residents were asked to rate the usefulness of different information sources, regardless of how much they used them. Roadside messages, temporary roadside signs and radio travel news alerts were rated by most residents, over half rating them as always/usually useful. Sat Nav and Phone Apps were rated by around half of London residents, with slightly more positive ratings. Twitter updates were rated by around a third, about half of which rated them as always/usually useful.

London residents



Usefulness of methods for checking traffic conditions
London residents

Base in 2012: All London residents (3222)

4

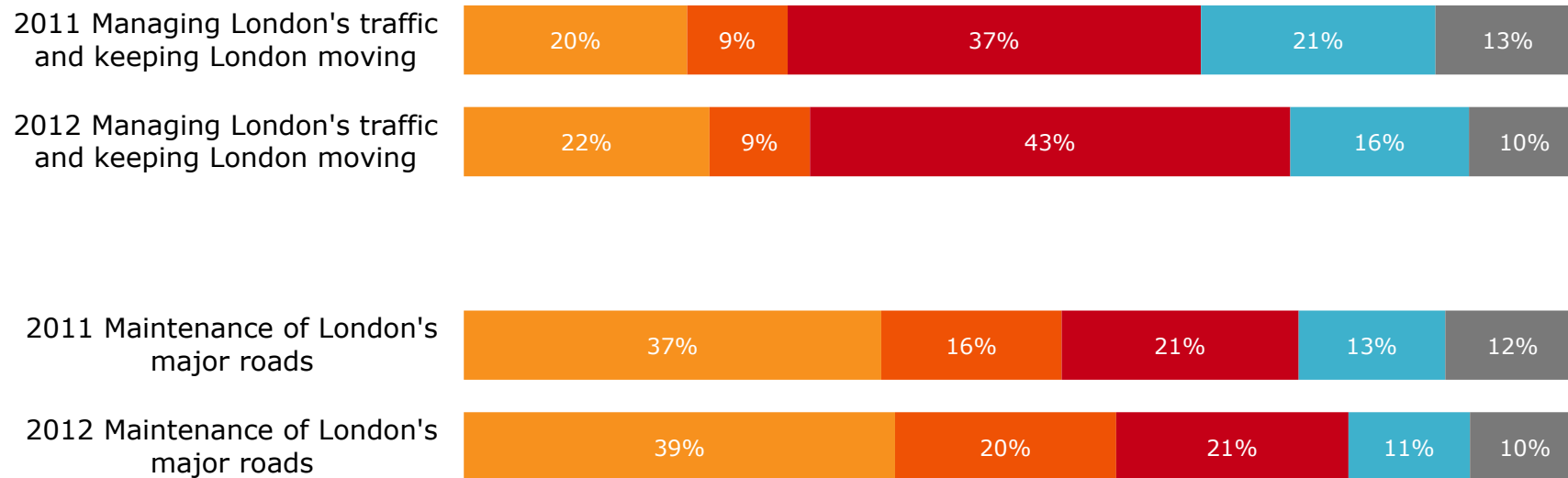
Perception of TfL responsibility for TLRN network

People based data



In 2012, there was an increased public awareness that TfL is responsible for the management of London's traffic and keeping London moving. However, in comparison, the public's awareness of TfL's responsibility for the maintenance of London's major roads is much lower and has changed very little since 2011.

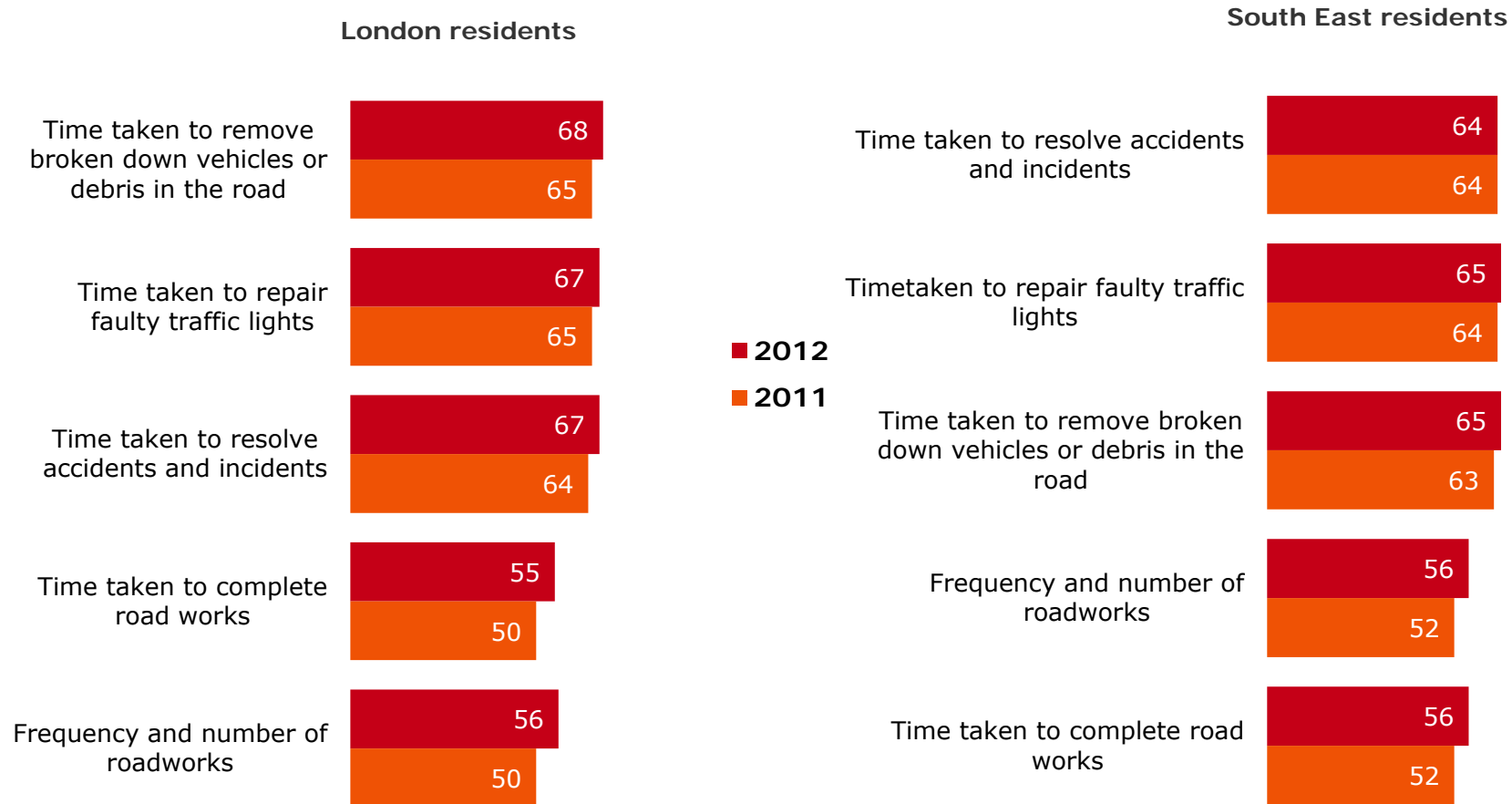
■ Highways Agency/ Department for Transport
 ■ London boroughs
 ■ Transport for London
 ■ Mayor of London
 ■ Don't know



Awareness of responsibility for London's roads

Base in 2012: All London residents (3222)

Satisfaction scores with the time taken to deal with different types of disruption on the TLRN were similar in 2012 compared to 2011. Satisfaction was lowest for roadworks (the main disruption experienced by TLRN users), with average satisfaction scores of less than 6 out of 10 (i.e. 60 out of 100). For other types of disruption (resolving accidents, removing broken down vehicles and repairing faulty traffic lights), average scores were slightly higher.



Satisfaction with disruption on TLRN (mean scores out of 100)

Base in 2012: All London residents (3222), all South East residents (316)

5

TLRN CSS Method



Background and Methodology

TNS has been carrying out the TLRN Customer Satisfaction Survey (CSS) since 2010.

The survey is conducted annually, using the TNS online panel (Lightspeed) amongst respondents based in London and the South East. To be eligible for interview, respondents needed to have used the TLRN in the last month, by any of the following modes:

- Car
- Pedestrian
- Bus
- Motorcycle/scooter/moped
- Taxi/commercial delivery/emergency vehicle
- Cycle

All interviews were carried out between 17th October – 18th November 2012

3,538 TLRN users were interviewed (3,222 in London and 316 in South East England), recording details of 8,270 trips in total i.e. Collecting multiple trips from some respondents.

Satisfaction questions are scored on a scale of 0-10, where 10 is extremely satisfied and 0 is extremely dissatisfied. Mean scores (e.g. 7.4) are then multiplied by 10 to provide a score out of 100 (e.g. 74).

Weights on gender and volumes by corridor have been applied to the survey data. The gender weights corrected a female bias in the internet panel used to source the sample. The corridor weights restored the correct usage levels of each corridor, which had been slightly distorted by setting quotas in order to achieve reasonably sized samples for the corridors and modes with lower usage levels.

Base sizes

Details of 8,270 trips were recorded in the 2012 survey. The sample size for each mode was over 1,000 for the main modes (car, bus, pedestrian) and over 300 for the minor modes (motorbike/scooter/moped, cycle, taxi/commercial/emergency vehicle). Each corridor was represented by at least 300 trips, apart from the A316 and A41 with slightly lower samples.

	Total trips	taxi/commercial delivery emergency service vehicle driver			motorbike scooter Moped	cyclist	bus passenger	car driver	pedestrian
Total	8270	432			319	565	2083	3096	1775

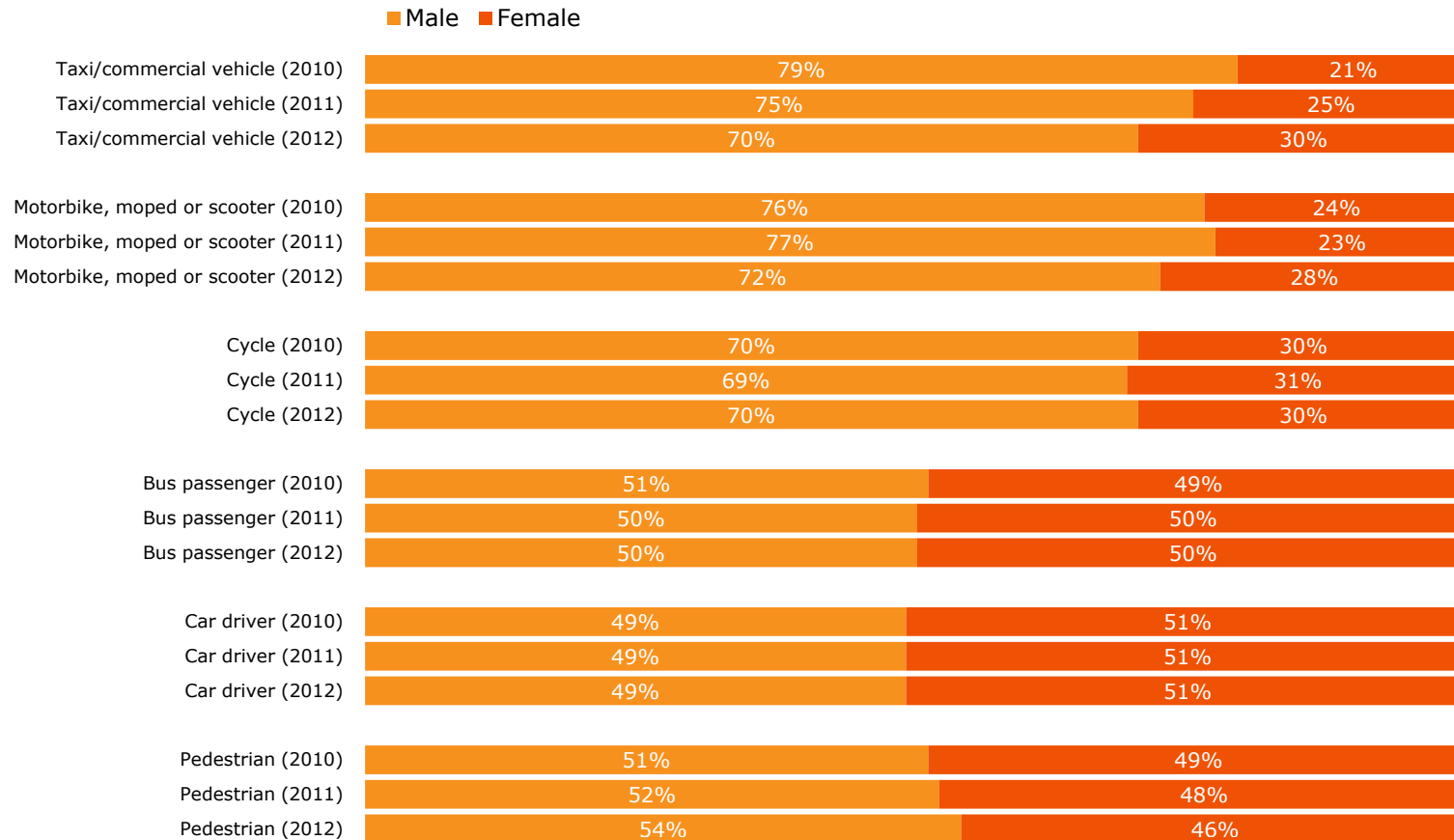
	Total	A10	A12	A13	A2/A20 /A102 Black wall Tunnel	A21	A23	A24/ A217	A3	A316	A4	A316/ A4	A40	A41	A406/ A205 North/ South Circular	London Inner Ring Road	A1
Total	8270	702	537	440	675	580	338	402	462	191	336	527	522	256	1031	318	334
Pedestrian sample size	1775	171	102	78	122	124	75	103	98	40	73	113	81	43	211	127	59
Commercial Vehicle sample size	432	50	19	25	35	36	15	21	18	7	18	25	34	12	53	12	22
Cyclist sample size	565	66	31	27	44	37	11	23	30	17	33	50	22	18	69	21	40

Red bolding indicates low base sizes

Base sizes (unweighted) by mode and corridor for trips made

NB: A316 and A4 grouped together for the A316/A4 corridor due to individual low base sizes

The profile of those using cycles, motorbike/scooter/mopeds and taxi/commercial/emergency vehicles were much more likely to be male. There was little variation over the years, although the profile of taxi/commercial vehicle drivers seems to be changing slightly over time.

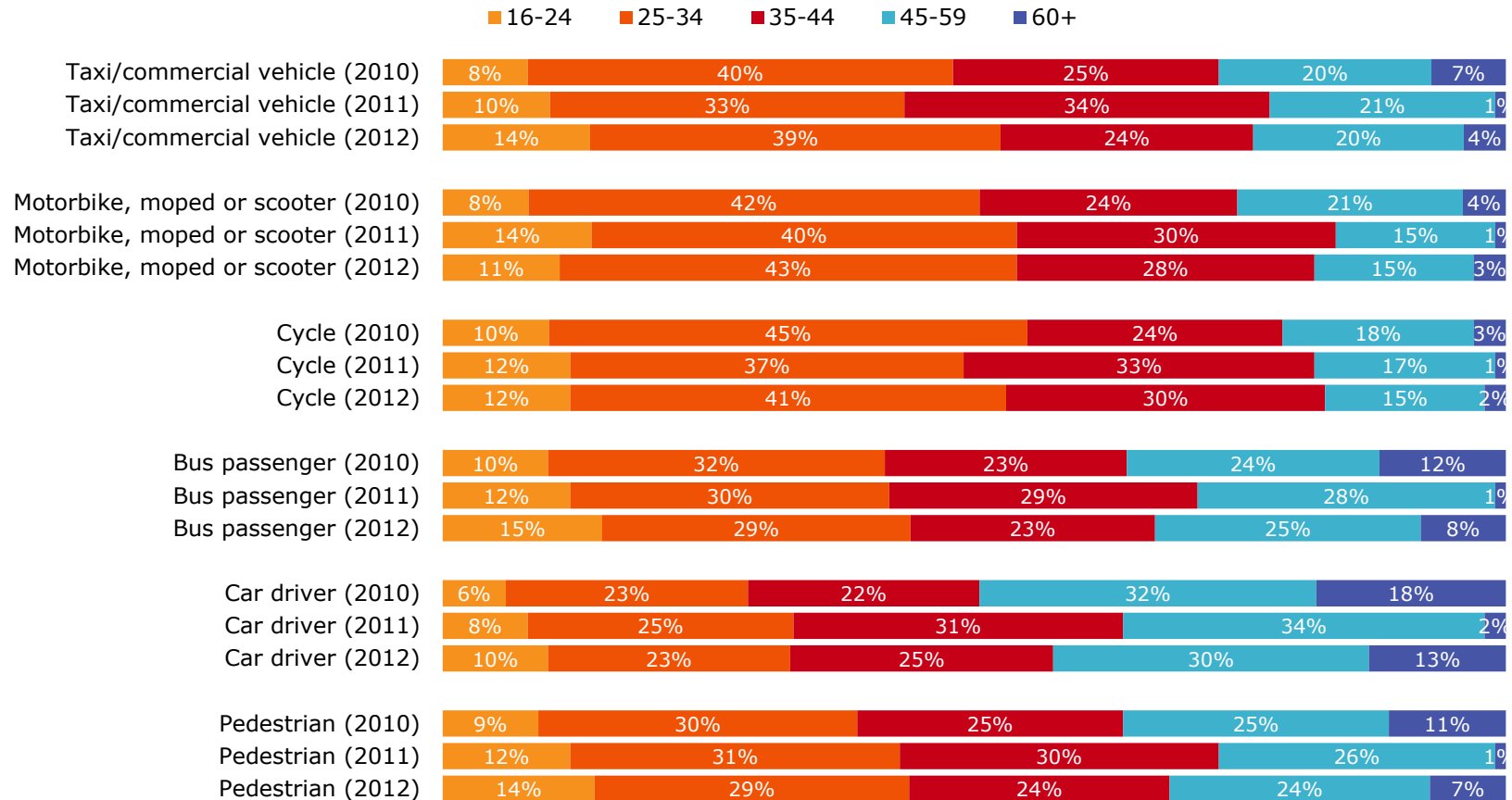


Profile by mode – Gender

Base in 2012: All trips – (8270), car drivers (3096), taxi/commercial vehicles (432), motorbikes/mopeds/scooters (319), bus passengers (2083), pedestrians (1775), cyclists (565)



The profile of those using cycles, motorbike/scooter/mopeds and taxi/commercial/emergency vehicles tended to be younger.



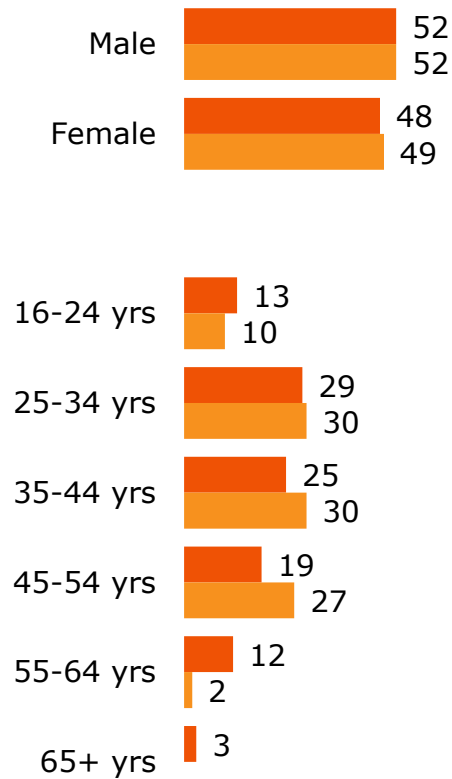
Profile by mode –Age

Base in 2012: All trips – (8270), car drivers (3096), taxi/commercial vehicles (432), motorbikes/mopeds/scooters (319), bus passengers (2083), pedestrians (1775), cyclists (565)

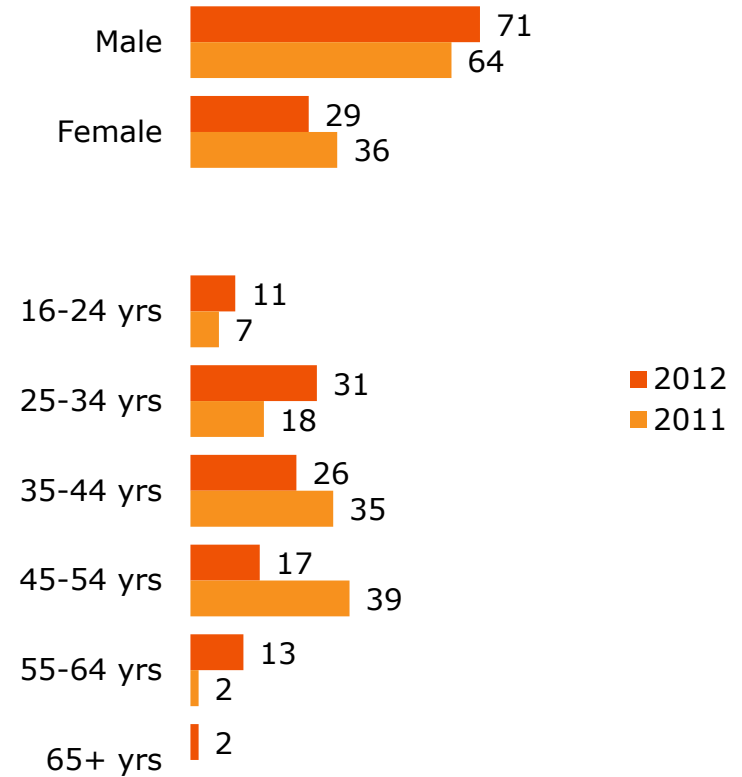


Those from the South East were more likely to be males with a relatively even age distribution. Londoners were more even in terms of gender, but were more likely to be younger. Compared to 2011, the age profile of both users is slightly younger.

London residents



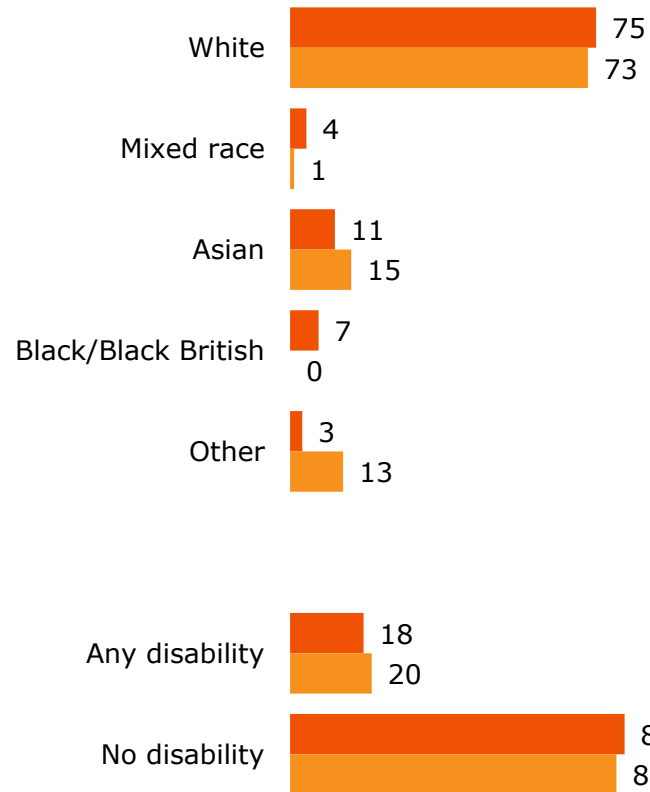
South East residents



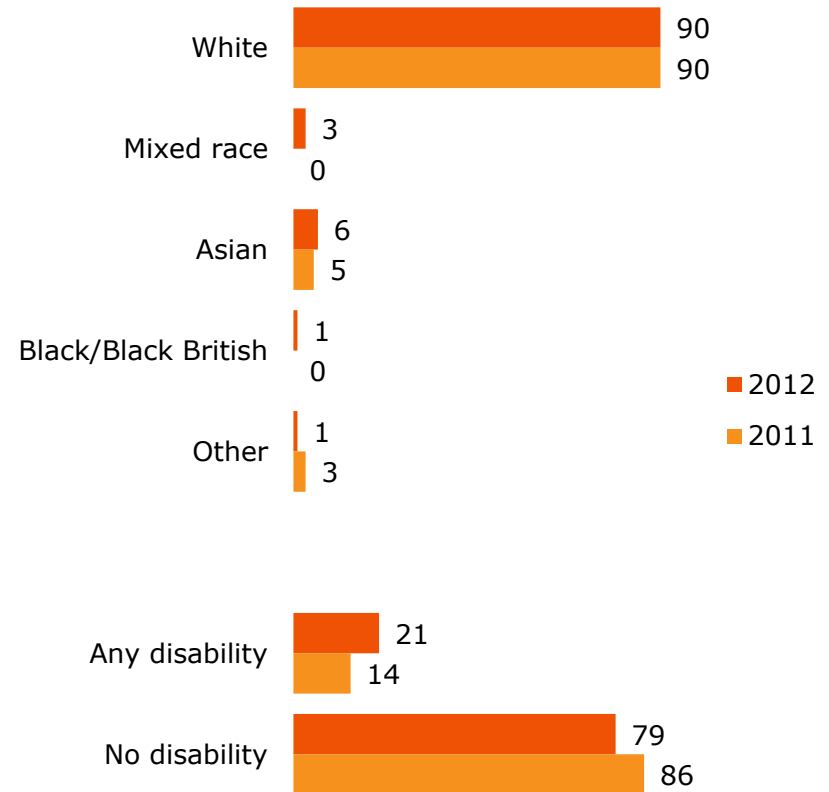
Profiling - Gender and Age

South East residents were more likely to be from a white background compared to London residents. This profile is similar to last year.

London residents



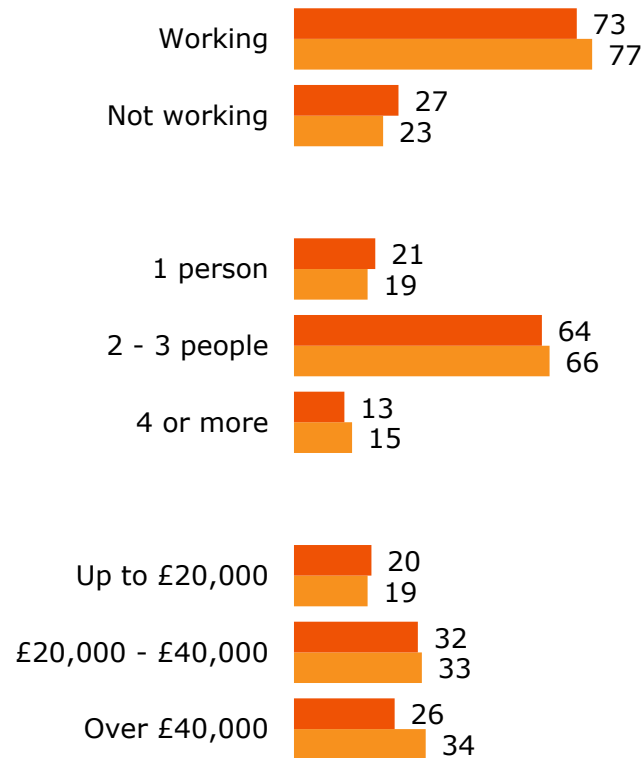
South East residents



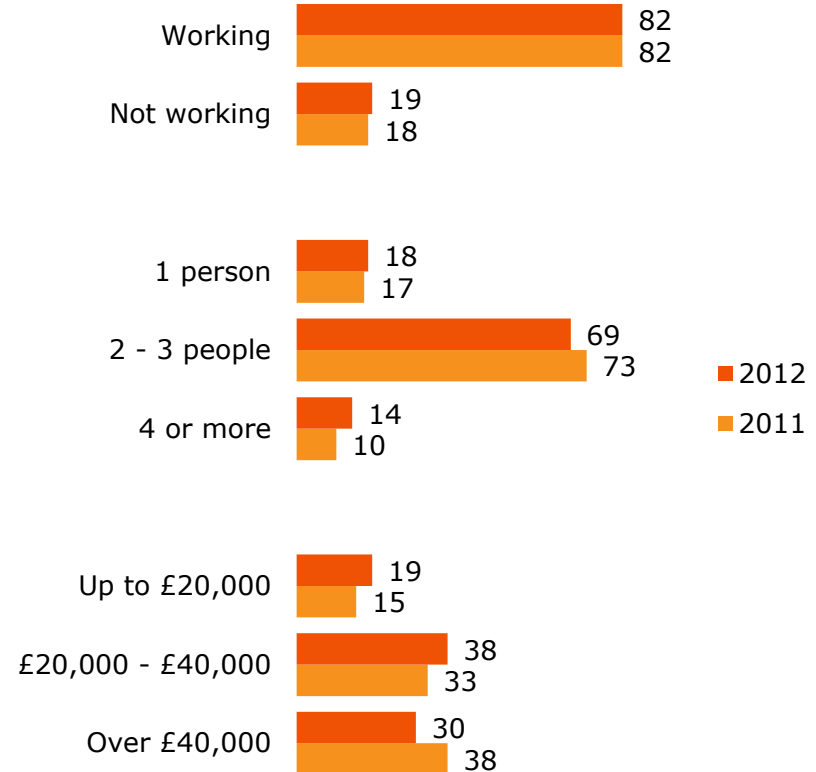
Profiling - Ethnicity and Disabilities

South East residents had a slightly higher household income, but these were otherwise similar to Londoners. As with much of the rest of the profile categories, there was little change since 2011.

London residents



South East residents



Profiling - Working status, household size (number of adults) and income

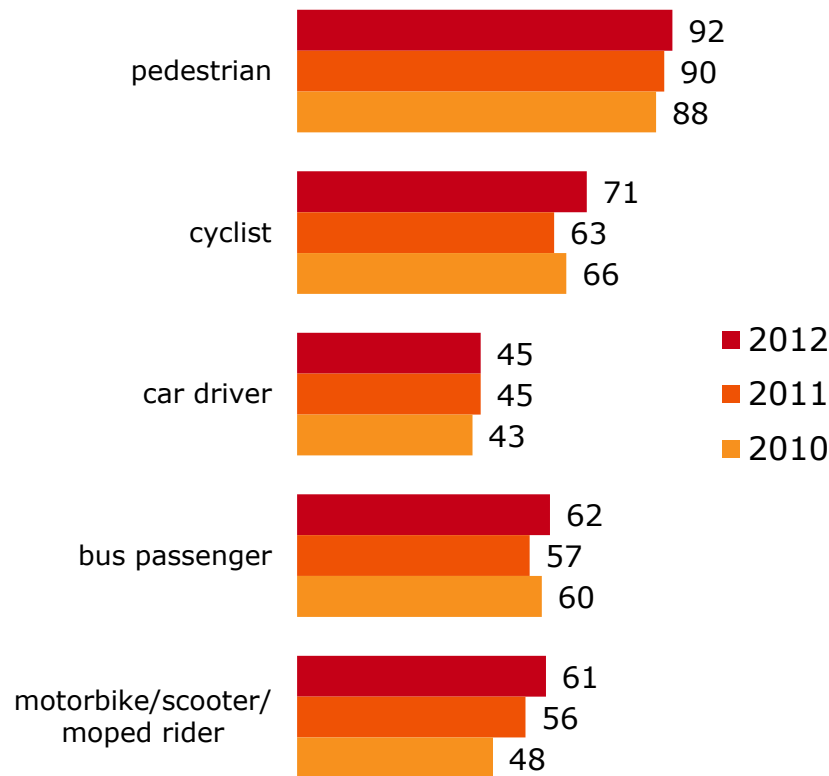
Transport for London



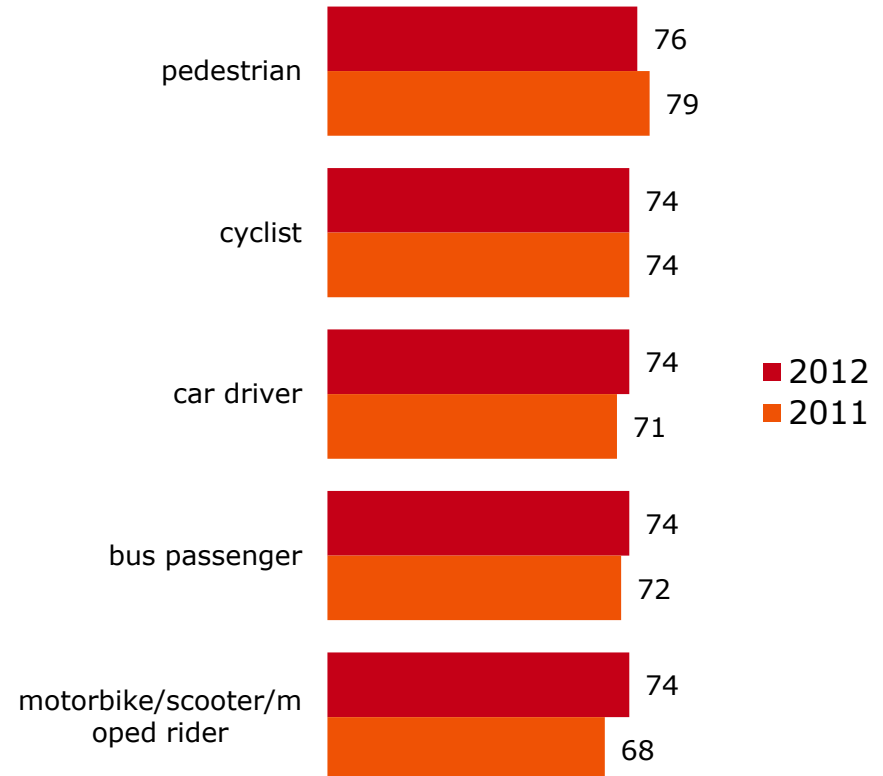
Base in 2012: All trips by London residents (7678). All trips by South East residents (592)

In the 2012 TLRN CSS, there was very little difference in satisfaction with estimating how long the journey would take between the users of different modes. However, in the Streets Management CSS, there was a greater difference in scores by mode, with pedestrians as the most satisfied group.

Streets Management CSS
Jul 2010, 11, 12 (% satisfied)



TLRN User CSS
Autumn 2011 & 2012 (score out of 100)

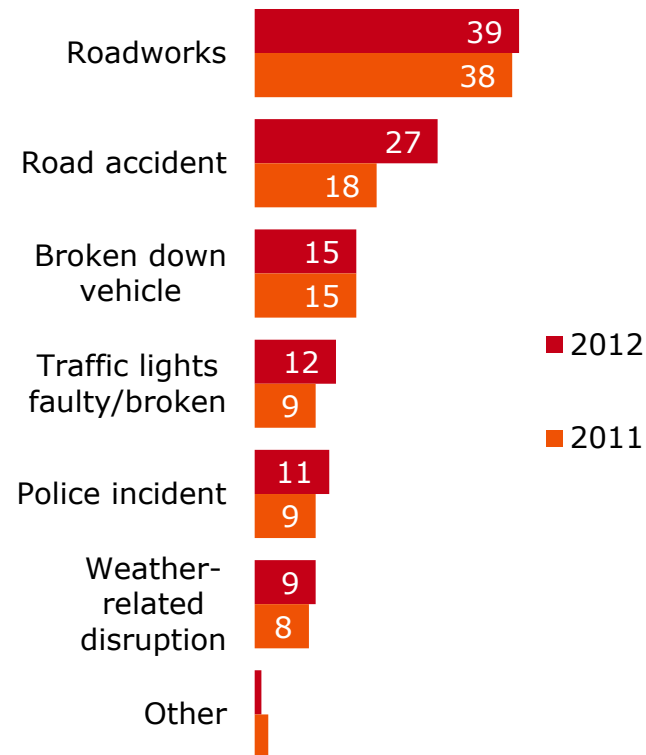


Satisfaction with estimating how long the journey would take
By mode

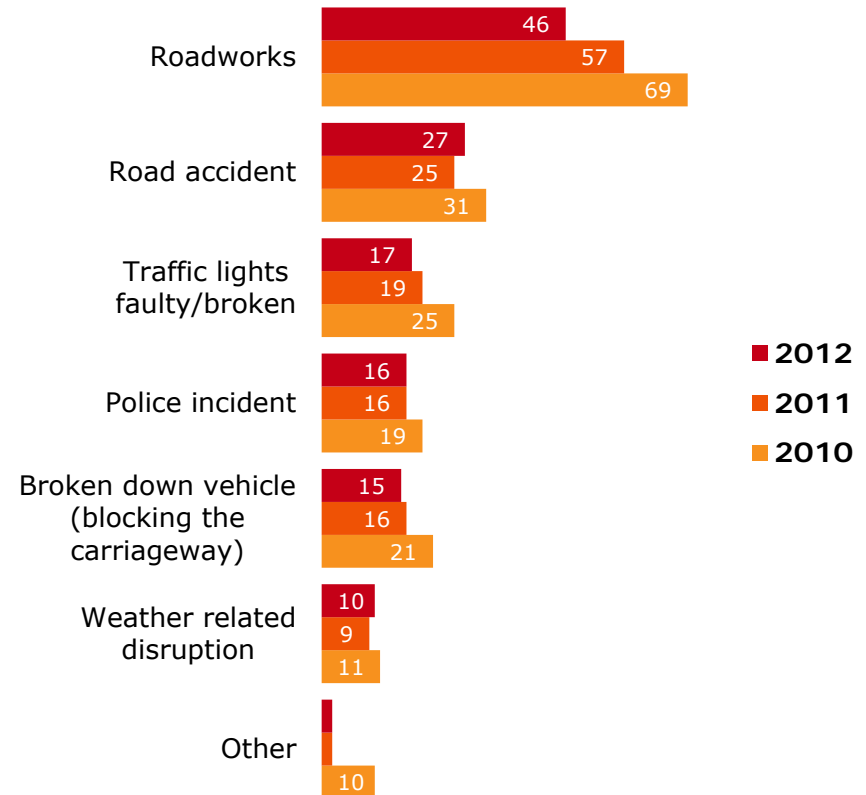
Base in 2012: All trips - (8270), car drivers (3096), taxi/commercial vehicles (432), motorbikes/mopeds/scooters (319), bus passengers (2083), pedestrians (1775), cyclists (565)

For South East residents, roadworks were still the main disruption experienced in 2012 (although to a lesser extent than London residents). However, road accidents increased from 18% to 27% (up to the same level as for London residents). Experience of other disruptions was at a similar level as in 2011 and compared to London residents.

SOUTH EAST RESIDENTS
(% experienced this type of disruption in last 3 months)



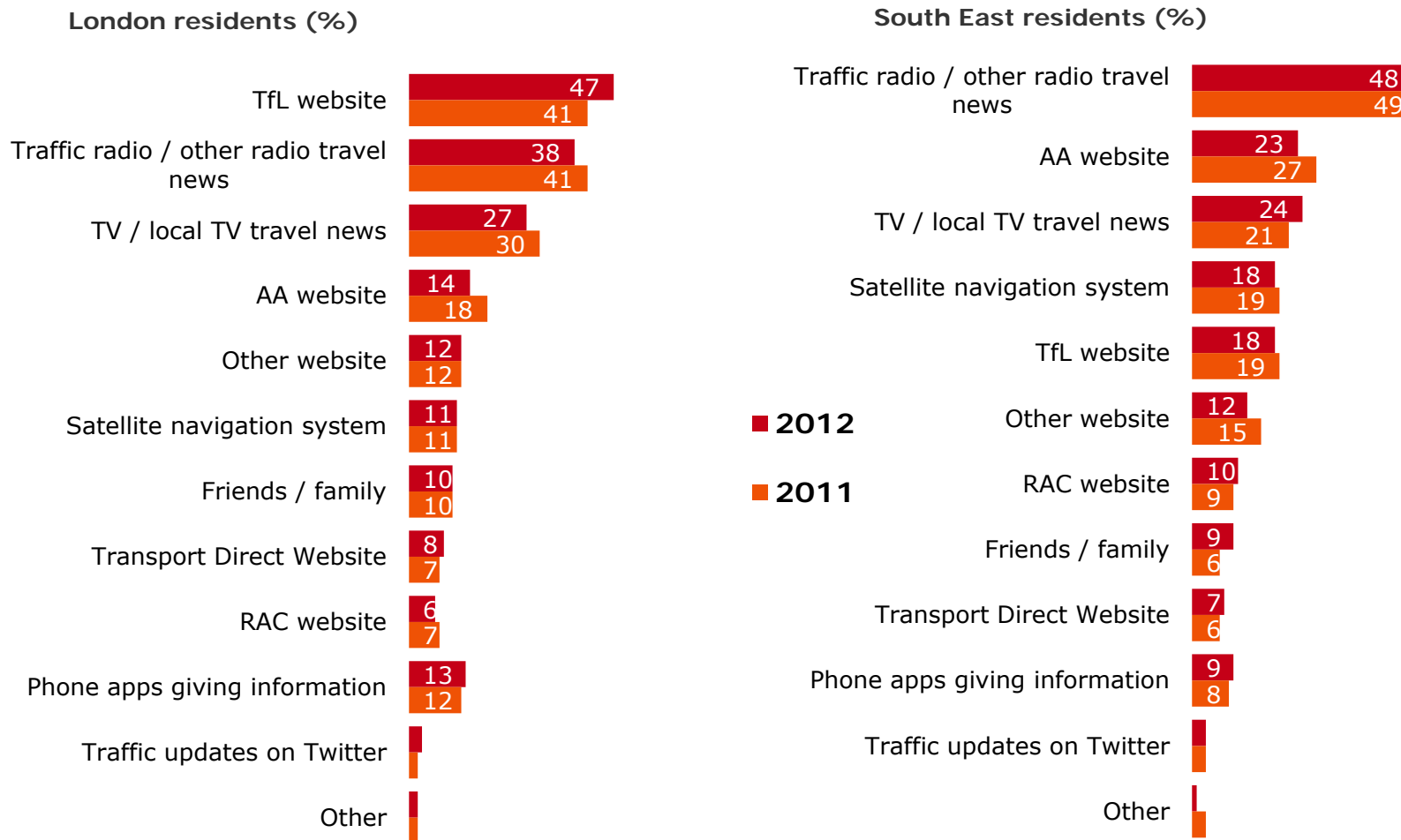
LONDON RESIDENTS
(% experienced this type of disruption in last 3 months)



Type of disruption experienced on TLRN in last 3 months
South east residents

Base in 2012: All South East residents (316)

Comparing Londoners with South East residents, the TfL website was much more likely to be used by Londoners, with radio and TV as important secondary sources. However, South East residents showed a strong preference for radio travel reports over other sources.

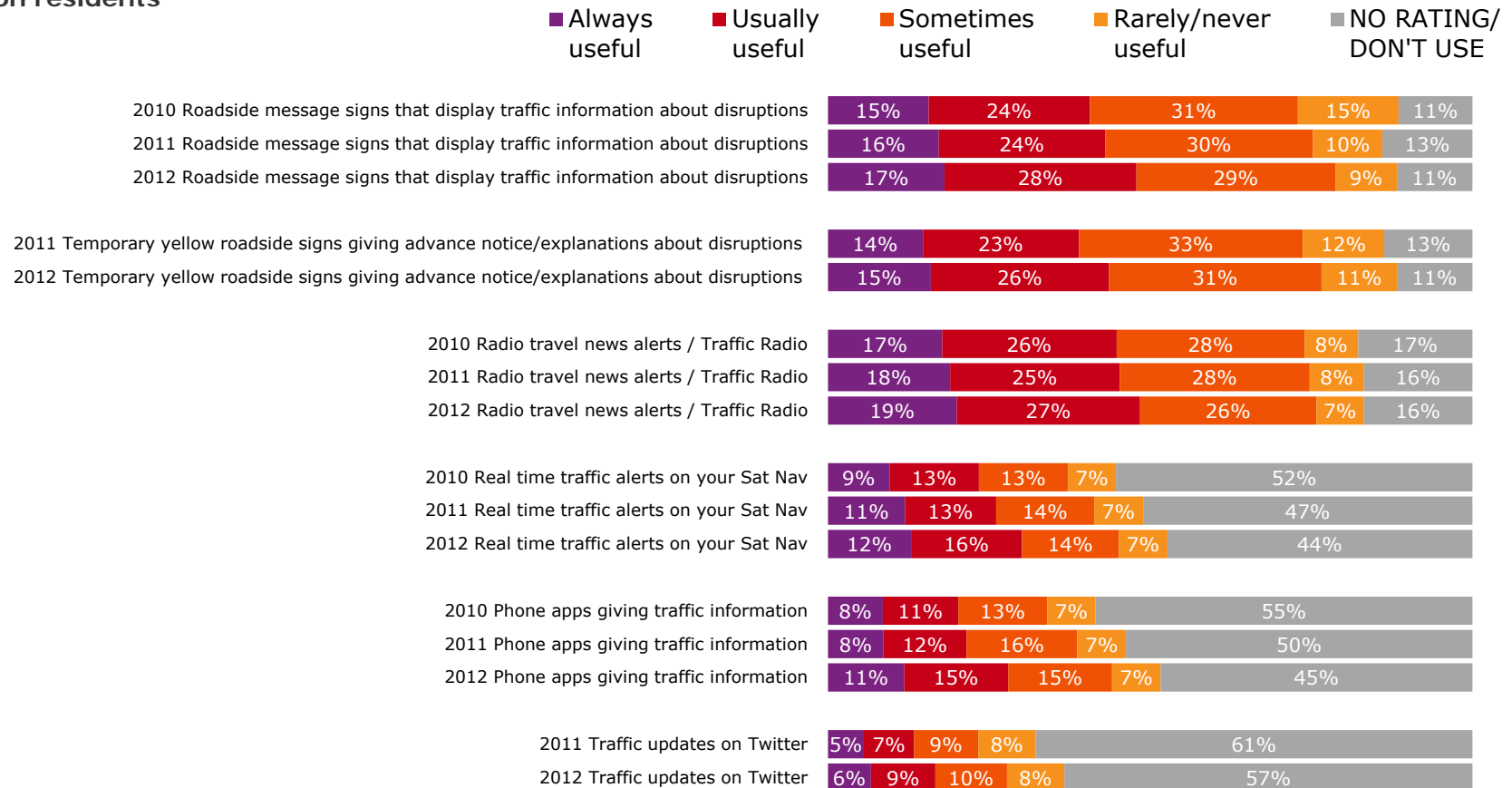


Methods of checking traffic conditions

Base in 2012: All London residents (3222), South East residents (316)

All London residents were asked to rate the usefulness of different information sources, regardless of how much they used them. Roadside messages, temporary roadside signs and radio travel news alerts were rated by most residents, over half rating them as always/usually useful. Sat Nav and Phone Apps were rated by around half of London residents, with slightly more positive ratings. Twitter updates were rated by around a third, about half of which rated them as always/usually useful.

London residents



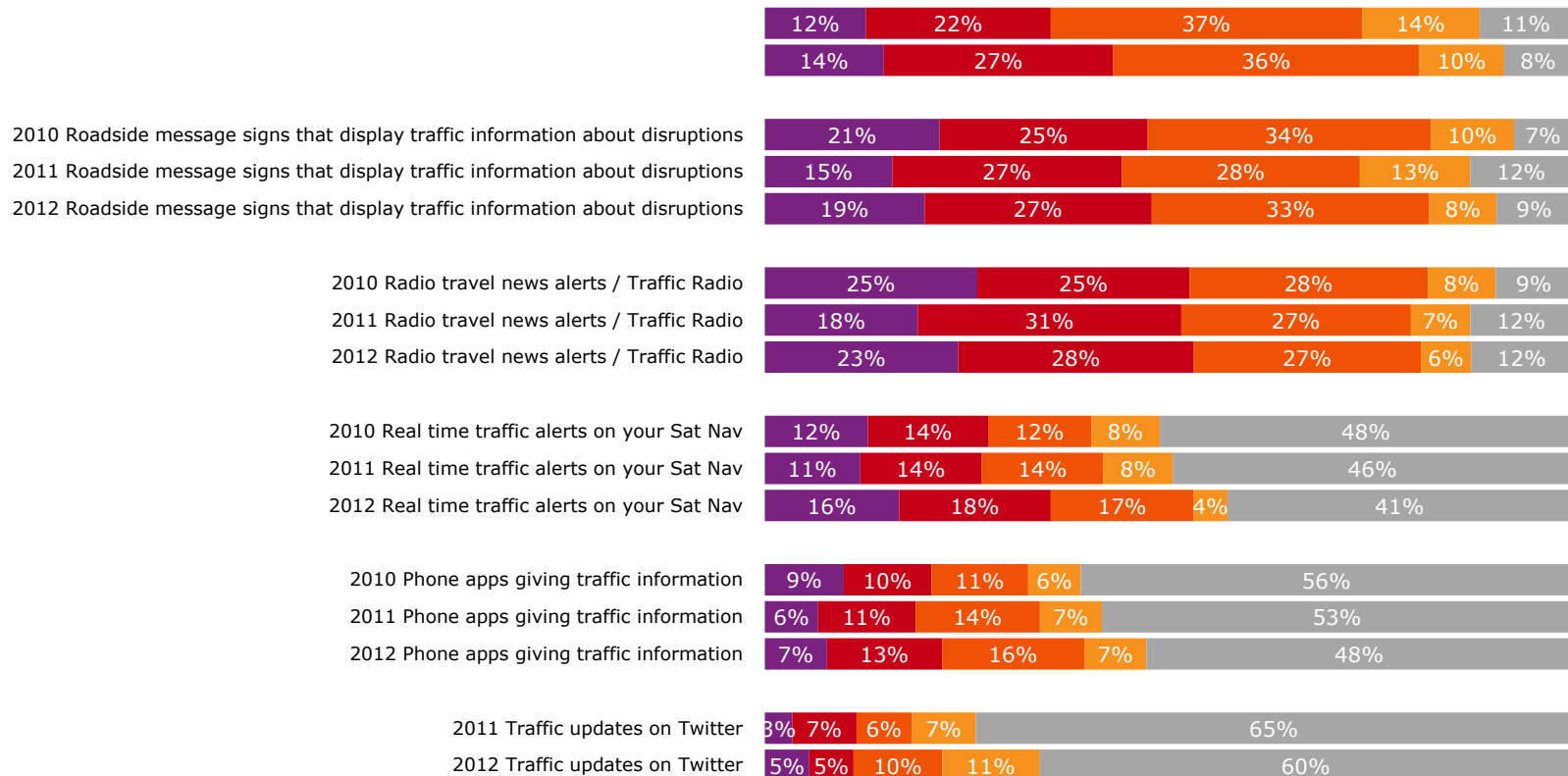
Usefulness of methods for checking traffic conditions
London residents

Base in 2012: All London residents (3222)

All South East residents were asked to rate the usefulness of different information sources, regardless of how much they used them. Roadside messages, temporary roadside signs and radio travel news alerts were rated by most residents, over half rating them as always/usually useful, with radio travel news alerts especially positive. Sat Nav and Phone Apps were rated by around half, with more positive ratings for Sat Nav. Twitter updates were rated by less than a quarter, with fewer positive ratings.

South East residents

■ Always useful ■ Usually useful ■ Sometimes useful ■ Rarely/never useful ■ Don't use this



Usefulness of methods for checking traffic conditions

South East residents

Base in 2012: All South East residents (316)