

MORI

Central London Congestion Charge Social Impacts Surveys 2002, 2003

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Executive Summary

This section presents a summary of the main findings from the Social Impacts programme. The overall aim of the surveys was to identify the differences between anticipated and actual experiences of and responses to the congestion charging scheme.

There were two main elements to the programme: a face-to-face household survey; and an individual telephone survey. For the household survey, seven case study neighbourhoods were selected for their contrasting social characteristics and access opportunities (three in the charging zone and four in Inner London). For the individual telephone survey, respondents from Outer London and beyond the M25 who travelled to Central London were recruited to take part in the telephone survey from twenty locations in the charging zone.

As targets were set for respondents from different household types and with different levels of car usage, the results from the surveys are not wholly representative of the entire populations in the charging zone, Inner London and Outer London and beyond the M25.

Change in local area

Respondents in the charging zone neighbourhoods are generally positive about the change in their local area since the surveys prior to the introduction of the charging scheme. The most positive impact of the scheme is perceived to be the reduction in congestion, with 55% of respondents spontaneously mentioning this. Related to this, half of charging zone respondents feel that travelling within the zone is easier, while only one in twenty say it is more difficult. Indeed, many respondents report spending less time travelling overall and for specific trips, with the majority of this change being directly attributed to charging scheme.

Inner London respondents are more likely than those in the charging zone to say their local area has not changed since the introduction of the charging scheme (63% compared to 41%). Of those who do report change in their Inner London local area, slightly more say their neighbourhood has deteriorated than improved. In line with this, when asked to rate a list of aspects in their local area, more Inner London respondents feel that the availability of parking, congestion, pollution, noise and sense of safety have deteriorated than have improved.

Access to local shops, facilities and services

With regard to access to local shops, facilities and services, most charging zone respondents have not experienced any change. Of those who do report change, 19% say accessibility is better; 6% say it has deteriorated. Again, of all the charging zone neighbourhoods, respondents in Holborn are most positive about the change in accessibility.

Access within the local area is also considered similar to circumstances before the scheme was introduced by a majority of Inner London respondents. Respondents from Hoxton are particularly negative about accessibility, reporting an increase in cars parked in their area, as well as concerns about 'strangers' parking in their neighbourhoods (related to a rise in the number of drivers from outside the community parking their vehicles and completing journeys to the zone on foot or by public transport rather than paying the congestion charge).

Of respondents who say they have started to shop online or do this more often in the survey than before the scheme was introduced, the proportion increases with distance from the zone, rising from 5% of respondents within the zone to 36% beyond the M25. However, the proportion of respondents doing so in response to the charging scheme is higher within the CCZ than beyond the M25 (30% and 12% respectively). Around one fifth of Inner and Outer London respondents who shop online do so because of the charging scheme.

Access to the charging zone

The majority of respondents from Outer London and beyond the M25 also feel unaffected by the scheme. For example, 60% say they have experienced no change in getting to the zone, partly due to their relative infrequency of travelling into Central London. Of those who report change, respondents are divided about whether it is better or worse.

Parking

Parking is an important, though unrelated, issue in terms of respondents' experience of the scheme. For example, over a quarter of Inner London respondents spontaneously cite fewer parking spaces, excessive traffic wardens or a rise in the cost of parking as one of the main reasons why their local area is now worse. Related to this, 18% of Inner London respondents say sense of safety in their area has deteriorated; while 6% say it has improved since the survey prior to the introduction of scheme.

Public transport

Inner London respondents are positive about the change in public transport provision in their local area in terms of greater availability and reliability. It is notable that fewer respondents expected this improvement when interviewed before the scheme was introduced.

Social gatherings

Meetings with family and friends have clearly been affected by the charging scheme. Inside the charging scheme 43% of charging zone respondents believe family and friends are now finding it more difficult to visit them (in line with expectations), although half find visits have not been affected. Related to these findings, over two in five respondents from Inner London and one in five from Outer London and beyond the M25 say they are meeting up with family and friends in the zone less often.

Of all the Inner London neighbourhoods, Hoxton has the greatest proportion of respondents who meet up with family and friends in the zone less often than before the introduction of the scheme (23%). Drivers to the zone from Inner London have also been affected in this way.

This reduction in visits to family and friends was anticipated by the majority of respondents, though in fact fewer have actually found these visits 'more difficult' than predicted. The cost of the charge and difficulty with parking are by far the main reasons why respondents say it is difficult for family and friends to visit them. In addition, there is a perception that penalty charges may be incurred because of uncertainty in paying.

Travel behaviour

On the whole, charging zone respondents from the three neighbourhoods have not greatly changed the number of journeys they make within the zone for a range of activities (e.g. commuting, shopping, business trips). There is little change in car use by charging zone respondents, who are eligible for the residents' discount. In contrast, there is a significant fall in car use by Inner London respondents, who would normally pay a £5 daily charge to enter the zone, particularly for commuting and business trips. Respondents in Outer London and beyond the M25 are less likely to drive into the zone for any of the activities asked about; of the 70% who drove into the zone before the scheme was introduced, half say their travel patterns have been affected by the scheme.

With regard to the amount of time spent travelling, a majority say this has not changed. Of those respondents who report change in Inner London, a slightly higher proportion say more time is spent travelling now than before the introduction of the charge, in line with expectations.

Affordability of the congestion charge

The majority of charging zone respondents are finding the congestion charge affordable, although the expectations of some drivers have been realised with almost a quarter experiencing difficulty in paying it. There are some clear differences between neighbourhoods and socio-economic groups; for example, Borough respondents are significantly more likely to be experiencing difficulty than those in the West End.

A smaller proportion of respondents in Inner London than those living in the zone are finding paying the charge difficult. Indeed, a majority consider it affordable, with many experiences better than expected. Respondents from Outer London and beyond the M25 are finding the charge significantly more difficult to pay than Inner London respondents (28% compared to 18%). In Inner and Outer London, as well beyond the M25, around a quarter of frequent travellers (those paying the charge for more than 60 days a year) are finding it difficult to afford the charge, compared to six in ten who are not.

Beneficiaries and losers of the charging scheme

Now that respondents have experienced the scheme a greater proportion feel they have gained from the charging scheme than expected this to be the case.

However, significant numbers have changed their opinion about how it has impacted on both them and their household, with the majority now saying that the scheme has actually made no difference to them.

It should be noted that respondents were more negative (and remain so) about the overall impact of the scheme on their household than about their own personal experience.

Those most likely to say they have personally gained from the charging scheme are from higher income households, without cars, those making work trips and those from Holborn and Peckham neighbourhoods. Those most likely to say they have personally lost are those who drive in the zone, from lower income households, and from Borough and Hoxton neighbourhoods. Respondents from Outer London and beyond the M25 are less likely to report any impact from the charging scheme.

1. Introduction

1.1. Background and objectives

The central London Congestion Charging Scheme (CCS) began on 17 February 2003. The motivation for introducing congestion charging is to reduce congestion – a high priority in the Mayor's Transport Strategy.

The scheme operates within the Congestion Charging Zone (CCZ) between 7:00am and 6:30pm, Monday to Friday and the standard charge is £5 per day. Motorists need to pay either before or during the day of travel and can pay for a day, a week, a month or a year at a time. On the day of travel motorists can pay up to midnight, but there is a surcharge for paying after 10.00pm. There is an £80 penalty fine for those who do not pay, which is discounted to £40 for prompt payment.

Motorcycles, mopeds, emergency vehicles, buses, coaches and taxis are exempt. For an annual registration charge, blue badge holders and alternative fuel vehicles do not have to pay. Certain NHS and fire fighting staff are entitled to have specified operational journeys reimbursed, as are some NHS patients. Residents in the zone are entitled to a 90% discount, on paying an administration fee.

The scheme is supported by a comprehensive monitoring programme which looks at the impacts of the scheme upon traffic, transport, the economy, the environment and at the social consequences of the scheme. To establish a monitoring baseline, surveys in selected case study areas were conducted before congestion charging was in place.

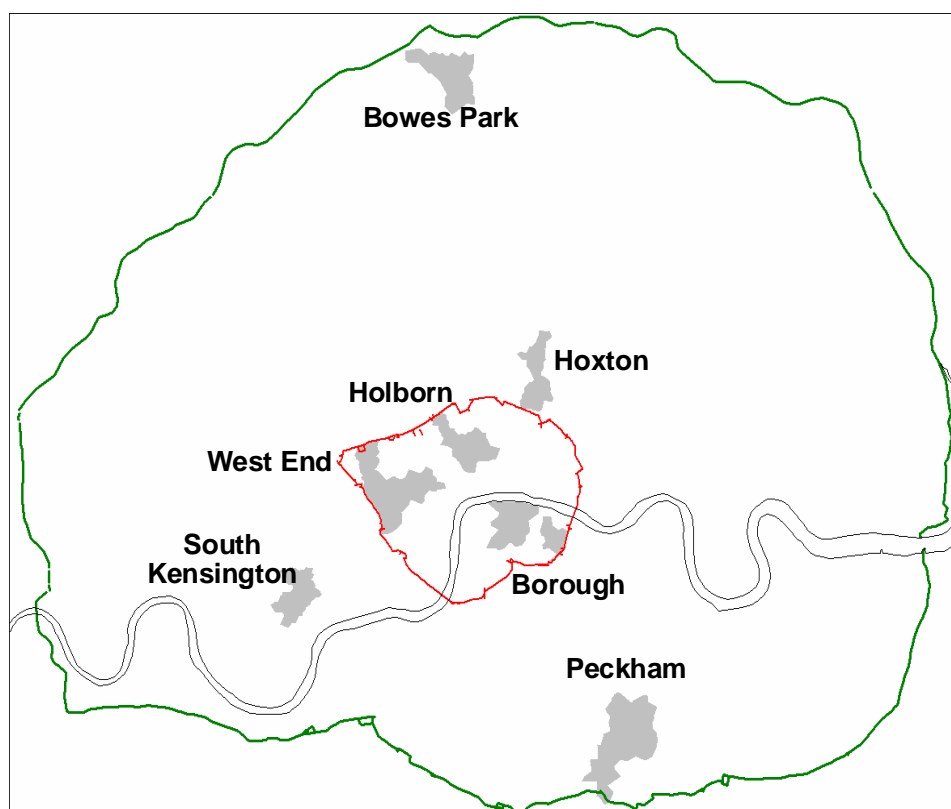
Two surveys that are part of the social impacts monitoring programme have been repeated now that congestion charging is operational. These two surveys consisted of a face-to-face household survey and an individual telephone survey.

The 'after' surveys involve re-interviewing as many of the original respondents as possible who took part in the household and individual surveys in 2002. The main aim was to identify the differences between anticipated and actual experiences of and responses to the scheme, and the reasons why people and households have adapted to the scheme as they have.

The overall purpose of the research programme has been to evaluate the social impacts on the seven selected neighbourhoods as a consequence of the introduction of the CCS. However it must be borne in mind that many things will have changed for those undertaking the study, either within their own household, such as moving jobs, or within their local community, such as new shopping facilities or new parking initiatives, which will also impact to a greater or lesser extent. It is not always easy to isolate the impacts associated solely with the scheme, however where possible, evidence of change not related to the charging scheme has been identified.

1.2. Methodology: Household survey

In 2002, the household survey consisted of a 35 minute face-to-face interview of all members aged fourteen or over of 2286 households selected from seven neighbourhoods located in the CCZ or Inner London. In total 3475 respondents were interviewed, and of these 2,042 agreed to be re-contacted for the 'after' survey.

Figure 1.1: Location of Inner London and CCZ neighbourhoods

These seven case study neighbourhoods were selected for their contrasting access opportunities and social characteristics. Chapter 2 of this report introduces the seven survey neighbourhoods. It provides profiles of each neighbourhood and the characteristics and travel patterns of respondents in both the 2002 and 2003 surveys.

The 2002 survey was designed so that matched samples of households took part in each neighbourhood. Quotas were set to ensure participation of the full range of household types in terms of car ownership, household income and life stage. The aim was to enable information to be gathered on the variety of possible responses to the charging scheme, and experiences of it, within each contrasting neighbourhood.

To enable responses of broadly 'matched' samples of households to be compared in each neighbourhood, quotas were set to recruit similar numbers of households in each neighbourhood in each of 40 'household type' categories. The quotas were based on car ownership (two categories, car-owning and non-car-owning) household income (four categories) and life stage (five categories).

Some flexibility was applied to allow for the varying ease or difficulty of finding particular household types in neighbourhoods, as defined by wards, having very different household populations. For example the quota for households in all car-owning categories (accounting for 20 of the 40 categories) in each neighbourhood was between eight (minimum) and twelve (maximum), to achieve an average across all neighbourhoods of ten per cell.

The method of recruitment was 'free find', as often used for qualitative research. Contact interviews at addresses within the specified neighbourhoods were followed by main interviews with households willing to participate provided they met the quota requirements. Household interviews were conducted face-to-face separately with everyone in the household aged 14 years or over. All were encouraged to read an information pack before their interview, to ensure that responses would be based on a reasonably accurate understanding of the scheme and how it will operate.

For the 2003 survey, face-to-face interviewing was used again to ensure comparability of responses. Fieldwork was conducted between 1st November 2003 and 19th February 2004, and the interview took an average of 45 minutes. A copy of the questionnaire is available on request.

Of the 2,042 respondents who agreed to be re-contacted for the 'after' survey, 54% of respondents actually took part in an interview (1,108 respondents from 729 households). More respondents from Inner London than the charging zone participated in the 'after' survey (678 and 430 respectively), reflecting the design of the 'before' survey.

Given that the movement in and out of the neighbourhoods has been substantial, a new sample of addresses was also drawn with which to complete a new cross-sectional survey (referred to as the 'after only' survey throughout this document). Additional interviews were conducted in the four Inner London neighbourhoods with 382 respondents from 255 households between 27th February and 31st March 2004.

1.3. Methodology: Individual survey

In the 2002 survey, the telephone survey involved interviews with 2,132 respondents resident in Outer London and beyond the M25. Respondents were recruited to take part in the telephone survey via on-street face-to-face interviews at 20 different locations within the charging zone, with quotas set for purpose of journey, mode of travel, age, gender and frequency of travel into central London to help ensure representation of the different types of people that travel into the zone. These respondents then took part in a follow-up telephone interview a few days later that asked them specifically about the journey they were making when recruited.

In 2002, 1,637 respondents from Outer London and beyond the M25 agreed to be re-contacted for the 'after' survey. In total, 47% of respondents were actually re-interviewed (551 from Outer London and 226 from beyond). Interviews were conducted by telephone between 19th November and 22nd December 2003.

1.4. Selected journey: Household survey

One purpose of the household survey is to understand respondents' perceptions of congestion charging, and their responses to it, with reference to journeys they make in, into or through the CCZ. An additional objective is to understand how respondents making local journeys within Inner London, that do not involve traveling within the zone, are affected by the scheme and the complementary improvements to public transport.

By focusing on a recent 'tour' for a particular activity (that is the complete journey from leaving to returning home afterwards) and thinking of the different stages, destinations, factors affecting timing and other people involved, respondents were able to concentrate on how they would organise travel when undertaking the same activity after the scheme's introduction. In the follow-up survey, respondents were reminded of the 'tour' and asked how it had actually changed, if at all, since the introduction of the scheme.

In the 'before' survey, selection procedures were devised to gather full details from each respondent of a recent 'tour', defined as 'all stages of a journey for a selected activity from when they left home to when they returned home'. However, in some cases full data relating to the return trip was not collected in 2002 (further to this, in 2003 full detail of the return trip was only captured if it differed from the outbound journey).

It was recognised that if the tour selected for each respondent had been chosen at random, those selected would often prove to be unaffected by the scheme. Inner London respondents in particular might often make more travel locally than inside the charging zone, so the tours most likely to be directly affected by the charging scheme would be less likely to be selected. A random sample of tours would not therefore be the best basis for investigating changes to travel arrangements in response to the scheme, or how different respondents might expect to be affected. Procedures were therefore designed to select a cross-section of activities focusing on those involving the types of tour more likely to be affected by the scheme, and within this, ensuring that a variety of experiences were explored.

The questionnaire was designed to select a 'tour' based upon an activity that each respondent undertakes at least once a year. Questions were designed to allow activities to be selected in a priority order, with highest priority given to tours most certain to be directly affected: car-based tours inside the charging zone during the charging hours. The next priority was for activities involving travel by any other mode in the charging zone during charging hours. Least priority was given to tours that do not involve travel inside the charging zone or during charging hours.

To decide which activity to select when there was more than one to choose from, respondents were asked which, if any, they thought would be most affected by the CCS. If this still left a choice between activities, the activity carried out most frequently was chosen.

With this selected activity as the starting point, respondents were asked to recall a recent day when they carried out this activity, and all the journey stages that were involved, between leaving and returning home.

A detailed record was built up of the modes of travel used, the journey times experienced, the destinations visited, activities carried out and company they may have shared at each stage of the journey.

Once the details of their tour had been recorded, respondents were encouraged to think about how this tour 'might be affected, or organised differently, as a result of the congestion charge'. In the 'after' survey, respondents were asked how the tour had been affected, if at all.

The sample of tours that was captured in this way was not intended to be representative of all tours that respondents make. It was designed to capture a variety of tours giving priority to those more likely to be affected, to ensure that the scheme's potential impacts on all types of tours could be fully explored.

For the 'after' survey respondents were asked to recount an 'equivalent' tour to the one described in the 2002 survey. They were reminded of some key details of the tour (i.e. activity, destination and main method of travel used) to ensure that the 'after' tour was equivalent and were able to say whether it had changed in any way (e.g. now do it outside of CCS hours or not at all). For comparability, respondents provided details of the 'after' tour in the same format as the 'before' tour.

1.5. Selected journeys: Individual survey

For the individual survey, respondents' tours consisted of the journeys they made from home to the charging zone on the day they were recruited. The tours involved travel into the charging zone during charging hours and therefore were likely to have been directly affected by the scheme had it been in place when they were made.

By focusing on the tour for the particular activity undertaken on the day of recruitment - and thinking of the different stages, destinations, factors affecting timing and other people involved - respondents were able to concentrate on how they would organise travel when undertaking the same activity after the scheme's introduction. A detailed record was built up of the modes of travel used, the journey times experienced, the destinations visited, activities carried out and company they may have shared at each stage of the journey.

Details of all stages of the 'before' tour were recorded at the recruitment stage and in the follow-up telephone interview. At recruitment stage, details of the tour were recorded up until the point respondents were either recruited inside the charging zone or when they had reached the intended charging zone destination for the main purpose of their journey. The remaining details of the tour, including activities and places visited while inside the charging zone and the stage by stage details of the return journey home, were recorded in the telephone interview. Again, full details of the return trip were not recorded in all cases in 2002.

As with the household survey, respondents were asked to recount an 'equivalent' tour to the one described in the 2002 survey. They were reminded of some key details of the tour (i.e. activity, destination and main method of travel used) to ensure that the 'after' tour was equivalent and they were able to say whether it had changed in any way.

1.6. Question and analysis techniques

The survey used various questioning and analysis techniques to identify attitudes towards congestion charging, experiences of it and how journeys had been affected if at all since the introduction of the scheme.

‘Prompted compared with spontaneous’

Prompted questions are those where respondents are given possible answers from which to choose. They allow a specific frame of reference to be used, and ensure that people are given the opportunity to consider all relevant issues / answers.

Often, though, it is more telling to see what thoughts people offer us *unprompted* – since this can tease out those views which are already on people’s minds – and so are probably of particular importance to them.

Such unprompted questions do, however, almost always lead to a lower level of response (since people find it difficult to be ‘spontaneous’ or ‘creative’ during a formal interview).

We therefore need to be guided not so much by the level of responses to any particular issue, but the fact that they appear at all. If, for example, 5% mention a particular issue spontaneously, several times that number would mention it when prompted – but the relative *ranking* of issues would likely remain very much the same.

Throughout the document, unprompted questions have been identified.

1.7. Interpretation of the data

As have been previously mentioned (1.2), while every effort was made to contact all those willing to take part in the follow-up survey, the resultant sample did not totally match the household profile in the Inner London neighbourhoods, resulting in additional fieldwork amongst certain household types within these neighbourhoods being undertaken. This data has been used with in the report where no direct comparison with the ‘before’ case has been made.

In studies where a panel-based approach is used (i.e. where the same people are interviewed in both surveys), “before-after” (B-A) differences can be measured with greater precision, than if completely different sets of people are interviewed. This allows Confidence Intervals (CIs) to be narrower and hence if true they can be detected more easily (technically speaking, “with greater power”). With two independent samples, the B-A difference in, for example, mean satisfaction scores may appear amongst a large amount of background noise or sampling error. The ideal method, in terms of minimising this background noise, involves using the same respondents in both surveys, as each respondent effectively uses him or herself as a control.

This leads to the concept of “Paired Tests” as opposed to “Unpaired Tests”. In Unpaired Tests, the significance of the differences is assessed between the groups by calculating a Mean and a Standard Deviation (SD) for each group separately and pooling the SDs for the two groups. With Paired Tests, the B-A change is examined for each individual, the Mean and SD calculated for these changes and tests run to see if there are any differences in the average (Mean) scores. If there is no difference in Mean scores we accept our null hypothesis, meaning that the samples are not statistically different.

Although both types of tests (if carried out on the same data) are likely to yield the same mean B-A differences, the SDs of these differences and hence the amount of background noise on which these differences are based are likely to be much smaller with the Paired Test. In other words, it would be far easier to detect a significant difference using the Paired than the Unpaired Tests.

It is worth bearing in mind that sections of the survey deal with respondents' perceptions at the time of the survey rather than the facts; in particular, these perceptions may or may not accurately reflect levels and quality of services actually being delivered.

In the report, reference is made to 'net' figures. This represents the balance of opinion on attitudinal questions, and provides a particularly useful means of comparing the results for a number of different variables. For example, in the case of a 'net gain' figure, this represents the percentage who feel they have gained from the congestion charging scheme less the percentage who say they have lost. For example, if 30% of respondents say they have personally gained and 20% feel they have lost, the 'net gain' score is +10 points.

Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of 'don't know' categories, or multiple answers. Throughout the report an asterisk (*) denotes any value of less than half of one percent but greater than zero.

1.8. Publication of data

As TfL have engaged MORI to undertake an objective programme of research, it is important to protect the interests of all organisations by ensuring that the research is accurately reflected in any press release or publication of findings. As part of our standard terms and conditions of contract, the publication of the findings of this research is therefore subject to the advance approval of MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

1.9. Glossary

The following table provide definitions of key terms used throughout the report.

Table 1.1:

After only	Respondents who were recruited to boost the number of certain types of household for the 2003 survey. They completed the 'after' questionnaire only.
BME	Respondent originating from an ethnic minority group.
Central London	Congestion charging zone as inferred from the 'before' survey.
CCZ	Three selected neighbourhoods lying within the congestion charging zone . These are Borough, Holborn and the West End.
Driver	CCZ respondents living in the CCZ who ever drive within the CCZ during charging hours for any purpose.

Non Driver	CCZ respondents who do not drive within the CCZ during charging hours for any purpose.
CCZ Driver	Inner London respondents who ever drive into or within the CCZ during charging hours for any purpose.
Non CCZ Driver	Inner London respondents who do not drive into or within the CCZ during charging hours for any purpose.
Frequency	<p>Frequency with which respondents travel into the CCZ during charging hours for any purpose. The frequency breaks referred to in the report are:</p> <p>At least weekly – travel into the zone at least once a week during charging hours for any purpose.</p> <p>At least monthly – travel into the zone at least once a month during charging hours for any purpose (includes ‘at least weekly’).</p> <p>Less often – travel into the zone less often than once a month during charging hours.</p>
Inner London	Four selected neighbourhoods lying within Inner London but outside of the congestion charging zone. These are Bowes Park, Hoxton, Peckham and South Kensington.
Multi-person household	Households which contained more than one person aged 15 or over in the 2003 survey.
Panel	The group of respondents who completed both 2002 and 2003 surveys. This allows their expectations be compared to their actual experience.
Selected Journey	In the 2002 survey, respondents were asked to recount the <u>last</u> time they made a specific journey which would fall within the proposed congestion charging hours e.g. a journey undertaken for a specific activity, to a specific destination at a certain time and travelling by a specific method of transport. This journey was selected on the basis of travelling for a particular activity. In 2003, respondents were again asked to describe how they make the same journey (i.e. for the same activity) following the introduction of the charging scheme.
Socio-economic group	<p>A = Higher managerial, administrative or professional</p> <p>B = Intermediate managerial, administrative, or professional</p> <p>C1 = Supervisor or clerical and junior managerial, administrative or professional</p> <p>C2 = Skilled manual workers</p> <p>D = Semi and unskilled manual workers</p> <p>E = Those at the lowest level of subsistence (state pensioners etc, with no other earnings)</p>

2. Summary of impacts on surveyed neighbourhoods and selected traveller types

This section focuses on the seven study neighbourhoods. First, a brief description is given of each neighbourhood in terms of its socio-economic profile and accessibility to and within the Congestion Charging Zone (CCZ). Following this, a summary is provided of some of the new transport initiatives in each of the neighbourhoods since the scheme was introduced. These will be important to bear in mind when reading the results.

The profile of respondents and households who participated in the follow-up survey is then presented.

2.1. Congestion charging zone neighbourhoods

Three neighbourhoods were selected in the Congestion Charging Zone (CCZ) to provide a range of contrasts in terms of access opportunities and socio-economic features.

Survey Neighbourhood	Neighbourhood name	Borough
Cathedral & Abbey	Borough	Southwark
Brunswick & Holborn	Holborn	Camden
Baker St & West End	West End	Westminster

Source: MORI

Profile

The table below provides the profile of all respondents who participated in the 'before' and 'after' surveys from the CCZ neighbourhoods. The profiles are broadly similar, with the exception of fewer younger people taking part this time as is typical in panel surveys (37% under 34 years olds in 2002, against 31% in 2003).

	Gender		Age			Ethnicity	Working status	Car/van in household	Household Income			
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	Yes	< £10K	£10-£19K	£20-35K	£35K +
2003 Total (430) %	48	52	31	41	28	26	51	66	20	24	24	31
2002 Total (1,438) %	50	50	37	37	26	29	55	69	22	25	26	26

Response rate

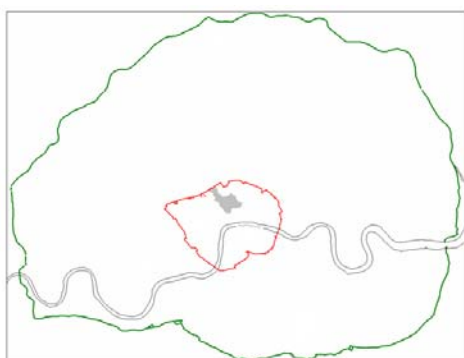
- 1,438 respondents from the CCZ took part in the 2002 'before' survey. Of the 794 respondents who agreed to be re-contacted, 54% of respondents actually took part in the 'after' survey (430 respondents from 274 households).

Summary

- Around a quarter of CCZ respondents report making changes to their number of journeys as a direct result of the scheme. Of those CCZ respondents who think that their journey is now better, reasons given include improved transport links, a reduction in congestion and shorter journey times.
- A charge of £2.50 per week applies to the vehicles of registered residents within the zone. The vast majority of respondents either pay this charge themselves or it is paid by someone else living in the household. A minority treat the charge as a business expense. The charge is generally seen as 'affordable' although a significantly smaller proportion of respondents in the CCZ neighbourhoods say it is 'very easy to afford/don't notice it' than for Inner London. This is perhaps due to the fact that they pay the charge more frequently.
- Respondents in the CCZ are generally more positive when talking about their journey experiences on their individual selected journey compared with travelling overall. For every aspect of quality of travel on their selected journey involving travel to, from or within the CCZ, a higher proportion of CCZ respondents say that it has improved rather than got worse since the introduction of the scheme (see Chapter 1 for a full explanation of how the journey was selected).
- When considering the impact of changes in journey time for the selected journey, a fifth say that they have saved time on a similar journey, reflecting the general reduction in travelling time since the introduction of the charge. The most common ways of using this time is to 'relax more' or to spend more leisure time at home, work or college.
- In line with their expectations, one in ten CCZ respondents have changed their main mode of transport on their selected journey. Seventeen of the 150 who mainly drove before the scheme, now use a different main mode of transport, mainly taking the bus (7 respondents), or are either using a bicycle or walking (6 respondents).
- The negative expectations of CCZ respondents towards the personal impact of the scheme have largely not been borne out, with the greater proportion feeling that the charge has made no difference. While a slightly higher proportion of respondents feel they have lost rather than gained (26% compared with 24%), the proportion who have gained is higher than was expected in 2002.
- A fifth of respondents feel their household has gained as a result of the congestion charging scheme, a small increase in comparison to the expectations recorded in the 'before' survey. However, in 2002 approaching two-fifths expected to lose whereas the proportion who say their household has lost is only 26%.

- Respondents in the CCZ are more likely to say their area has changed for the better since the scheme was introduced. Describing the positive effects of the CCS, over a third spontaneously mention less traffic congestion. This is followed by around a tenth who note the improvement in public transport, emphasise an improvement in air quality, or say that travelling is now easier and more reliable.
- On the whole CCZ respondents think their local area has improved in terms of accessibility – although change varies significantly between the three neighbourhoods. The net improvement in access to shops, facilities, services and places they need and want to visit is double the anticipated level and almost half feel that travelling within the zone has got easier.
- In line with expectations, half the CCZ respondents perceive it to be more difficult for family and friends to visit now, and around a quarter say that they meet up in the zone less often. As a result, a significantly higher proportion of those in the CCZ say they now spend less time with their family and friends than expected this to be the case. Two-thirds of those who have experienced any change attribute this to the congestion charging scheme, with the actual cost of the charge the main reason. A small number of respondents specifically state that their family and friends do not want to pay the charge. Parking problems are also cited as a reason why family and friends find it more difficult to visit now.

2.2. Holborn



Profile

	Gender		Age			Ethnicity	Working status	Car/van in household	Household Income			
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	Yes	< £10K	£10-£19K	£20-35K	£35K +
2003 Total (129) %	47	53	33	40	28	26	47	62	22	30	28	19
2002 Total (472) %	50	50	39	35	27	29	50	68	26	26	24	25

Characteristics (2001)

Affluence	Ethnicity	Access to local facilities	Access within charging zone by public transport	Closest tube station	Closest rail stations
Medium	Medium	High	Medium	Russell Square Euston Kings Cross Holborn Chancery Lane	Euston St Pancras Farringdon Kings Cross

Response rate

- 472 respondents took part in the 2002 'before' survey. Of these 247 respondents agreed to be re-contacted for the 'after' survey, and just over half, 52%, actually took part in an interview (129 respondents from 78 households).

Service enhancements

- Increase of around 31 buses per hour (including 2 new routes 390, 476)

Traffic management and parking

- Holborn has had significant roadworks since the scheme was introduced and improvements to pedestrian crossings. The segregated cycle scheme has been extended.

Summary

- When compared with the other survey neighbourhoods, Holborn has the highest proportion of respondents across the charging zone and Inner London who say they have personally gained and the lowest proportion who say they have personally lost as a result of the congestion charge (31% compared with 16%), giving a net gain of +15%.
- Respondents living in Holborn are generally more positive than those from other neighbourhoods in the CCZ and Inner London included in the survey.
- Respondents in this neighbourhood are the most likely to report positive change in their local area, particularly an improvement in bus services and a significant ease in congestion.
- The perceived improvement in access to shops, facilities, services and places since the introduction of the charge is more pronounced in Holborn than in any of the other neighbourhoods covered by the survey. This is true for access both in the local area (31% say access has improved) and in London as a whole (36%).
- Holborn is the only CCZ neighbourhood, where more respondents think that it is now easier rather than more difficult to visit friends and family (all modes combined) than it was before the scheme was introduced. While some respondents do feel that it is now more difficult for family and friends to visit them, they are less likely to say this in comparison to the other CCZ neighbourhoods.
- Around a quarter (24%) of respondents from this neighbourhood say they spend less time travelling by all modes now than they did before the introduction of the charge, a proportion in line with Borough (25%) but higher than the West End (13%). Given that 16% of respondents say they spend more time travelling now, this neighbourhood has the largest net improvement (+8%).
- Although the majority (70%) of respondents from Holborn report no difficulties in paying the charge, one in five (19%) say they are finding it difficult - this is around half the proportion of Borough respondents (37%) but twice the proportion of those in the West End (8%).
- In line with findings on travel in general, respondents from Holborn are significantly more likely than respondents from the other two neighbourhoods in the CCZ to say that their overall travel experience, public transport options and traffic congestion for their selected journey have all improved.

2.3. West End



Profile

	Gender		Age			Ethnicity	Working status	Car/van in household	Household Income			
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	Yes	< £10K	£10-£19K	£20-35K	£35K +
2003 Total (128) %	45	55	20	39	41	12	55	66	15	19	21	45
2002 Total (473) %	50	50	34	36	29	31	57	69	23	25	26	26

Characteristics (2001)

Affluence	Ethnicity	Access to local facilities	Access within charging zone by public transport	Closest tube station	Closest rail stations
High	Medium	Medium/High	High	Bond Street Marble Arch Baker Street Marylebone Oxford Circus Piccadilly Circus Leicester Sq Green Park	Marylebone Charing Cross

Response rate

- 473 respondents took part in the 2002 'before' survey and 238 agreed to be re-contacted for the 'after' survey. 54% of those who agreed to be re-contacted actually took part (128 respondents from 86 households).

Service enhancements

- Increase of around 43 buses per hour (including 3 new routes (436, 390 (also in Holborn), 453 (also in Borough)). Articulated buses on route 453.

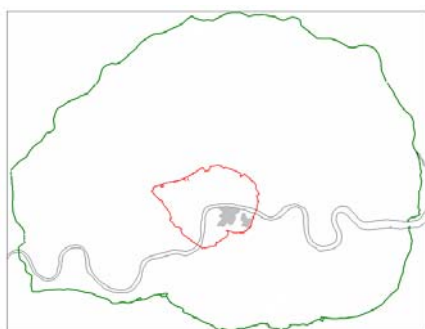
Traffic management and parking

- No initiatives have been reported since the introduction of the scheme.

Summary

- In the West End a similar proportion of respondents say they have personally gained as have lost as a result of the congestion charging scheme. This contrasts to Holborn where, on balance, a higher proportion have personally gained rather than lost and Borough where more say they have lost.
- Respondents in the West End are more likely than the other two CCZ neighbourhoods to perceive the most negative impact of the scheme in the zone is on trade and employment. They are more likely to cite a perceived loss of business as a main criticism against the CCS, and are more likely to report a perceived deterioration in local trade.
- A similar proportion of West End respondents believe that it is now easier as say it is more difficult for them to visit family and friends. However, around half of respondents say that it is now more difficult for family and friends to visit them, compared to 43% who find it easier, proportions comparable with Borough. Also, as in Borough, around a quarter meet up socially within the zone less often since the introduction of the charge.
- Journeys taken by West End respondents are less likely to have been affected in terms of time than the other CCZ neighbourhoods. Around three-quarters say they spend about the same time travelling as before.
- Although, on balance, respondents from all CCZ neighbourhoods say the charge is affordable, a higher proportion from the West End are finding it quite easy, perhaps reflecting the relative affluence of respondents in this neighbourhood, as 45% of respondents from the West End live in households with an annual income of £35,000 and over, this compares to 35% Borough and 19% in Holborn.

2.4. Borough



Profile

	Gender		Age			Ethnicity	Working status	Car/van in household	Household Income			
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	Yes	< £10K	£10-£19K	£20-35K	£35K +
2003 Total (173) %	53	47	35	43	23	37	50	68	21	23	21	35
2002 Total (493) %	50	50	39	39	22	34	58	72	23	25	27	25

Characteristics (2001)

Affluence	Ethnicity	Access to local facilities	Access within charging zone by public transport	Closest tube station	Closest rail stations
Low	Medium	Low	Low	Borough London Bridge Waterloo Southwark	London Bridge Waterloo Waterloo East

Response rate

- Of the 493 respondents in Borough who took part in the 2002 ‘before’ survey, 247 agreed to be re-contacted for the ‘after’ survey, of these 70% of respondents actually took part in an interview (173 respondents from 110 households).

Service enhancements

- Increase of around 35 buses per hour (including 4 new routes, 363 (also in Peckham), 360 (also in South Kensington), 453, 333). Articulated buses on routes 453 and 53.

Traffic management and parking

- Borough had some new Controlled Parking Zones (CPZs) set up after the scheme was introduced.

Summary

- Respondents from Borough have the highest proportion of respondents in the CCZ neighbourhoods (which is statistically significant) who say they have personally lost as a result of the introduction of the congestion charging scheme. A fifth of respondents from this neighbourhood say they have personally gained compared to a third who say they have lost, making Borough the least positive among the CCZ neighbourhoods.
- Respondents from Borough are also the least positive among the CCZ neighbourhoods about improvements in their local area. For example, 44% report that congestion has eased, compared to 57% among respondents in the West End and 68% among those in Holborn.
- Although not to the same extent as respondents from Holborn, those living in Borough are more likely to say that access to shops, facilities and places in London as a whole has improved rather than deteriorated.
- A slightly higher proportion of respondents in Borough say that it is now more difficult to visit friends and family than say it is easier, and around half feel that it is now more difficult for family and friends to visit them.
- While the majority of Borough respondents have not changed their frequency of social gathering the minority socialising less is larger than in other CCZ neighbourhoods, with 24% saying they spend less time with family and friends nowadays.
- Compared to respondents from the West End, respondents from Borough are more likely to have changed the amount of time they spend travelling since the scheme was introduced, a fifth spend more time travelling now and a quarter say they spend less.
- A significantly higher proportion of Borough respondents are experiencing difficulties in paying the charge than respondents from the other CCZ neighbourhoods, at 37% this is twice the proportion of Holborn respondents and over four times that recorded for the West End (19% and 8% respectively).

2.5. Inner London neighbourhoods

As in the CCZ, neighbourhoods were selected in Inner London to provide a range of contrasts in terms of access opportunities and socio-economic features.

Survey Neighbourhood	Neighbourhood name	Borough
Courtfield & Redcliffe	South Kensington	Kensington & Chelsea
Wenlock & Canonbury East	Hoxton	Islington/Hackney
Rye & Waverley	Peckham	Southwark
Bowes Park	Bowes Park	Haringey

Source: MORI

Profile

The overall profile of all Inner London respondents who participated in this survey is quite similar to the 'before' survey. As with the CCZ, fewer interviews were achieved with younger respondents (29% respondents compared with 37% total 2002), although this was compensated to some extent in the 'after only' survey (37% compared with 43%).

	Gender		Age			Ethnicity	Working status	Car/van in household	Household Income			
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	Yes	< £10K	£10-£19K	£20-35K	£35K +
2003 Total (678) %	44	56	29	39	31	21	52	77	23	15	17	43
2002 Total (2,037) %	48	52	37	39	24	22	59	71	20	24	27	29

Response rate

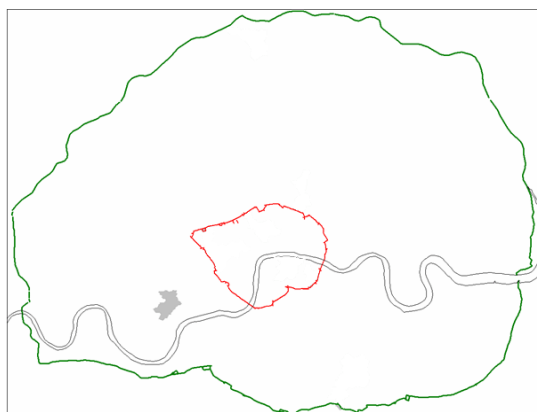
- 2,037 respondents from Inner London took part in the 2002 'before' survey. Of the 1,311 respondents who agreed to be re-contacted for the 'after' survey, 52% of respondents actually took part in the 'after' survey (678 respondents from 455 households).

Summary

- Within Inner London, of the 160 respondents who mainly drove into the CCZ for their selected journey (see Chapter 1 for a full explanation of how the journey was selected) before the charging scheme was introduced, 41 respondents now use a different main mode, with 15 changing to bus, 10 to underground or DLR, 6 to train, and a further 6 to bicycle or walking; Within Inner London, the number of respondents changing mode increases with social class and income. Overall, a quarter of Inner London respondents expected to make some kind of change to their journey following the charging scheme, but one third actually did so.
- For Inner London respondents, the expectations of a negative personal impact of the scheme have largely not been borne out. The greater proportion feel that the charge has made no difference to them, and a quarter say they have personally gained, a significantly higher proportion than expected this to be the case (14%), while a quarter expected to lose which they feel they actually have.
- For the majority the CCS has made no difference to their household while 14% feel their household has gained. While the proportion who say they feel their household has lost as a result of the scheme is higher than those who feel they have gained, the net difference between the scores is closer than expected in 2002.
- The majority of Inner London respondents feel their local area is unchanged, although one in five believe it has got worse since the introduction of the scheme.
- From the list of local aspects asked about, the availability of parking, congestion, pollution, noise (linked to the rise in traffic) and sense of safety, are all felt to have deteriorated. There are specific mentions of an increase in congestion on the boundary and unease at the increase of 'strangers' in local communities.
- Inner London respondents are positive about the change in public transport provision (greater availability and reliability). This is particularly the case in Hoxton and South Kensington, whilst those in Bowes Park are much less complimentary.
- Inner London respondents did not anticipate such an improvement in public transport, although the same applies for the increase in congestion and perceived lack of places to park. A greater proportion on all counts say they have actually not seen any change at all.
- The majority of Inner London respondents find access to shops, facilities and places the same as before the introduction of the charge. While there is no overall change to the level of difficulty in getting to the zone, Inner London respondents, on balance, find travelling within the zone easier now.

- Almost all respondents continue to visit their family and friends as much as before, although slightly fewer from Inner London now travel into the zone to do so. The majority have not experienced any impact from the scheme to their social life.
- Whilst Inner London respondents are now less likely to use a car to make trips into the zone during charging hours, they have responded by making more changes than CCZ respondents. For example, the proportion who ever use their car to commute to and from work has fallen by 10 percentage points, from 43% to 33%.
- While the majority of respondents spend a similar amount of time travelling as they did before the introduction of the charge, on balance slightly more in Inner London spend more time travelling on each trip and overall, where the reverse is true for CCZ respondents. These changes are in line with those anticipated by respondents. The majority of those who have changed the amount of time they spend travelling attribute the change to the congestion charging scheme.
- Although Inner London drivers are charged £5 a day to travel within the zone, affordability is better than expected, with the majority finding the charge affordable.
- Overall, Inner London respondents had expected improvements in their selected journey to happen following the introduction of the charging scheme, although one quarter did not expect to see the improvement in their overall journey experience. Inner London respondents are generally more positive than CCZ respondents when describing their experiences on their selected journey than when describing their experiences of congestion charging overall.

2.6. South Kensington



Profile

	Gender		Age			Ethnicity	Working status	Car/van in household	Household Income			
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	Yes	< £10K	£10-£19K	£20-35K	£35K +
2003 Total (154) %	48	52	23	36	42	11	53	75	25	9	9	56
2002 Total (541) %	51	49	36	36	29	18	59	72	16	22	29	33

Characteristics (2001)

Affluence	Ethnicity	Access to local facilities	Access within charging zone by car	Access within charging zone by public transport	Closest tube station	Closest rail stations
High	Medium	High	Low	High	Gloucester Rd S. Kensington Earls Court High St Kensington	West Brompton

Response rate

- 541 respondents from South Kensington took part in the 2002 'before' survey. Of the 359 respondents who agreed to be re-contacted for the 'after' survey, 43% of respondents actually took part in the 'after' survey (154 respondents from 108 households).

Service enhancements

- Increase of around 9 buses per hour (including new route 360).

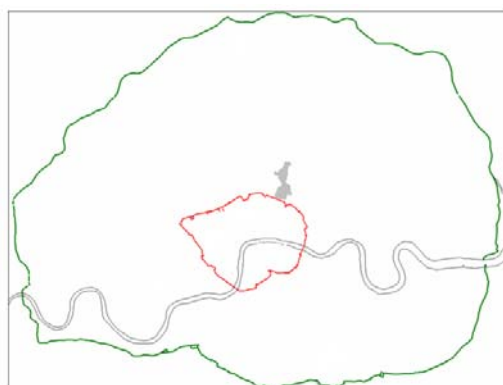
Traffic management and parking

- No specific initiative noted since the introduction of the charging scheme.

Summary

- Of the four Inner London neighbourhoods, those living in South Kensington are most likely to say their household has gained since the introduction of the congestion charging scheme.
- The majority (88%) of respondents in South Kensington report that access to shops, facilities, services and places in their local area remains the same as it was before the charge. A relatively small proportion (6%) say that access is worse than before the introduction of the scheme, this is half the level of Bowes Park (13%) and much lower than in Peckham and Hoxton (17% and 22% respectively).
- Other than those noting no change (58%), respondents in South Kensington are more likely to find it easier to get to the zone now.
- South Kensington respondents are more likely than those from Bowes Park and Hoxton to not meet up with family and friends in the zone at all (41%).
- More than eight in ten respondents in South Kensington whose family and friends now find it difficult to visit spontaneously cite parking as the problem. This is considerably higher than found in Inner London as a whole, where just under half of respondents give parking as the reason for difficulty in being visited.
- Those in South Kensington who drove into the CCZ prior to the introduction of the scheme are significantly more likely than the other Inner London neighbourhoods to say that they no longer drive into the CCZ (42% compared to 35% for those in Inner London overall).
- For their selected journey, respondents from South Kensington are in line with Inner London overall, reporting improvements in traffic congestion, public transport and the overall travel experience.

2.7. Hoxton



Profile

	Gender		Age			Ethnicity	Working status	Car/van in household	Household Income			
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	Yes	< £10K	£10-£19K	£20-35K	£35K +
2003 Total (192) %	40	60	25	41	34	25	45	77	30	25	14	30
2002 Total (471) %	46	54	37	39	24	23	56	69	22	27	27	24

Characteristics (2001)

Affluence	Ethnicity	Access to local facilities	Access within charging zone by car	Access within charging zone by public transport	Closest tube station	Closest rail stations
Low	Medium	High	High	Low	Old Street Angel Highbury & Islington	Essex Road Canonbury Highbury & Islington

Response rate

- 471 respondents from Hoxton originally took part in the 'before' survey, 377 of these agreed to be re-contacted for the 'after' survey of which 51% actually took part (192 respondents from 127 households).

Service enhancements

- Increase of around 4 buses per hour and new articulated buses on route 149.

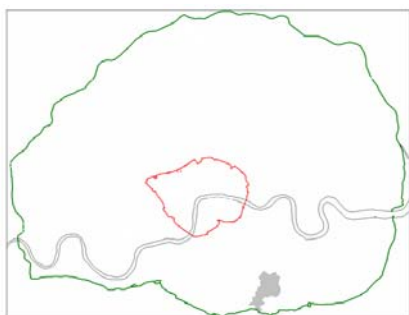
Traffic management and parking

- Traffic calming has been introduced in Hoxton.

Summary

- Of all the Inner London neighbourhoods, Hoxton has the greatest proportion of respondents who meet up with family and friends in the zone less often now (23%). They are also likely to make fewer journeys to visit family and friends and, as a result, spend less time with them overall now.
- With its position on the boundary of the zone, Hoxton has experienced the most change of all the Inner London neighbourhoods on a number of aspects. Often this change is negative; for example, a higher proportion of respondents from this area are finding access to London and travelling to the charging zone more difficult than respondents from the other Inner London neighbourhoods. In addition, those in Hoxton are the most likely to say that access to shops, facilities, services and places in their local area is worse than before (22%).
- Forty-four per cent of respondents from Hoxton report changes in their local area (the highest recorded in all the neighbourhoods), though they are divided about whether this is for better or worse (20% and 24% respectively).
- Respondents in both Hoxton and Peckham are much more likely to be positive about the availability and reliability of public transport, in comparison to those from the other two Inner London neighbourhoods. In addition, they are more likely than other groups to refer to the increased number of parking spaces and the introduction of resident parking (41% against 19% overall) as the reason why their local area has improved.
- Respondents in Hoxton are more aware, than those in the other Inner London neighbourhoods, about 'strangers' parking in their neighbourhoods (related to a rise in the number of drivers from outside the community parking their vehicles and finishing journeys to the zone on foot or by public transport), with one in eight from Hoxton spontaneously mentioning this when asked why they believed their local area had deteriorated.
- On their selected journey, improvements in public transport are more likely to be observed in Hoxton than in the other Inner London neighbourhoods. Almost half feel that the public transport options are better since the introduction of the scheme. Respondents from Hoxton are also more positive about their travelling experience overall, 43% believe it has got better while only 15% say it has got worse.

2.8. Peckham



Profile

	Gender		Age			Ethnicity	Working status	Car/van in household	Household Income			
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	Yes	< £10K	£10-£19K	£20-35K	£35K +
2003 Total (189) %	48	52	29	38	33	20	57	81	20	11	27	42
2002 Total (537) %	47	53	37	41	22	24	61	74	18	24	28	31

Characteristics (2001)

Affluence	Ethnicity	Access to local facilities	Access within charging zone by car	Access within charging zone by public transport	Closest tube station	Closest rail stations
Medium	High/Medium	Low	High	Low	No tube close by	Nunhead Peckham Rye East Dulwich Honor Oak Park

Response rate

- 537 respondents took part in the 'before' survey in Peckham in 2002. Of the 384 respondents who agreed to be re-contacted for the 'after' survey, 49% actually took part (189 respondents from 129 households).

Service enhancements

- Increase of around 10 buses per hour (including one new route 363).

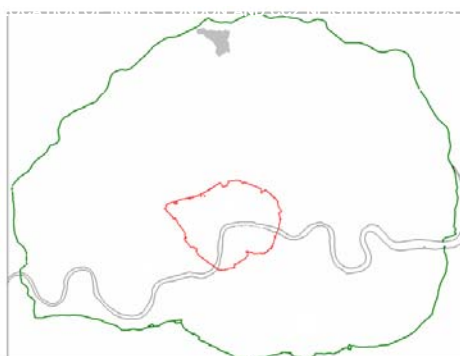
Traffic management and parking

- Peckham had a controlled parking zone (CPZ) completed around the start of the scheme in February 2003.

Summary

- Peckham respondents are the most likely to say that they have gained, both at a personal and household level.
- While only 3% of Inner London respondents spontaneously perceive businesses as having suffered, those in Peckham are slightly more likely to identify this as one of the main negative effects of the scheme (6%). This compares to 13% of respondents living in the West End.
- Within Inner London, respondents from Peckham as well as Hoxton are more likely to say that public transport options have improved.
- Apart from those noticing no change, respondents in Peckham find it easier rather than more difficult to get to the zone now.
- Peckham respondents are more likely than those from Bowes Park and Hoxton not to meet up with family and friends in the zone at all since the introduction of the scheme (31%).
- Respondents from Peckham are more likely than those in the other Inner London neighbourhoods to make fewer leisure trips as a direct result of the congestion charging scheme.
- Respondents from Peckham are more likely to say that traffic congestion has eased for their selected journey than respondents from the other Inner London neighbourhoods.
- Amongst those noting an improvement in the public transport options for their selected journey, Peckham respondents least expected these service improvements.
- For those who say that their overall travel experience for their selected journey has improved since the introduction of the scheme, one quarter did not expect this improvement, with respondents from Peckham (33%) more likely to not expect improvements compared with the other neighbourhoods.

2.9. Bowes Park



Profile

	Gender		Age			Ethnicity	Working status	Car/van in household	Household Income			
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	Yes	< £10K	£10-£19K	£20-35K	£35K +
2003 Total (143) %	39	61	33	47	20	26	55	76	20	12	20	48
2002 Total (488) %	47	53	38	40	21	25	59	74	23	25	25	27

Characteristics (2001)

Affluence	Ethnicity	Access to local facilities	Access within charging zone by car	Access within charging zone by public transport	Closest tube station	Closest rail stations
Low	High	Low	Low	High	Bound Green Wood Green	Alexandra Palace Bowes Park

Response rate

- Of the 488 respondents in Bowes Park who took part in the 'before' survey, 308 agreed to be re-contacted for the 'after' survey. Of these 46% of respondents actually took part in an interview (143 respondents from 91 households).

Service enhancements

- Increase of 3 buses per hour.

Traffic management and parking

- No traffic management or parking initiative noted since introduction of the charging scheme.

Summary

- Respondents within the Bowes Park neighbourhood are the least likely to think they have personally gained from the scheme, particularly in relation to Peckham (16% compared with 26%).
- However, respondents from Bowes Park are significantly more likely to mention a reduction in air pollution as a positive effect of the scheme.
- Respondents in this neighbourhood are much less likely to be positive about the availability and reliability of public transport in comparison with the other Inner London neighbourhoods.
- They are more likely than those in the other Inner London neighbourhoods, to find it more difficult to get to the zone since the introduction of the CCS.
- Bowes Park respondents are slightly more likely than other Inner London neighbourhoods to say access to London as a whole has improved (19%), although only 14% believe access to Central London is now better.
- The proportion in Bowes Park who say that access to shops, facilities, services and places in their local area is worse than before (13%), is lower than Hoxton (22%) although higher than South Kensington (6%).
- Those in Bowes Park are significantly more likely to spend less time in their home compared to those in the other neighbourhoods since the scheme was introduced. This may be related to the fact that they now spend more time on leisure activities.
- For their selected journey, respondents from Bowes Park are significantly more likely to say that their overall travel experience has got worse.
- In line with this, they are the most pessimistic of the Inner London neighbourhoods about the public transport options on their selected journey, with one quarter reporting that they have worsened. Furthermore, respondents from the Bowes Park neighbourhood are the most likely to say that congestion on their selected journey has got worse.

2.10. Outer London/beyond the M25

Profile

The table below provides the profile of all respondents who participated in the 'before' and 'after' surveys from Outer London and beyond.

	Gender		Age			Ethnicity	Working status	Household Income		
	Male	Female	<34	35-54	55+	BME	Working 9+ hours	£0-£19K	£20-35K	£35K+
2003 Total (777) %	69	31	30	51	20	12	87	9	23	68
2002 Total (2,132) %	68	32	43	44	14	17	81	13	28	58

Response rate

- 2,132 respondents from Outer London and beyond the M25 took part in the 2002 'before' survey. Of the 1,637 respondents who agreed to be re-contacted for the 'after' survey, 47% of respondents (777) actually took part in the 'after' survey.

Summary

- As in the CCZ and Inner London, the greater proportion of respondents from Outer London and beyond the M25 say that the scheme has made no difference to them personally (44%) or to their household (66%).
- At a personal level, those from beyond the M25 are significantly more likely to be positive about the scheme than those from Outer London: 30% say they have gained as a result of the scheme (compared to 21% in Outer London).
- The main positive and negative effects of the scheme for those in Outer London/beyond the M25 are very similar to those expressed by respondents in Inner London and the CCZ. Key positive effects are the ease in traffic congestion, followed by less pollution and reduction in travel time, while the negative effects are the cost of the charge and the restrictions on freedom of access.
- There is no significant difference in views on accessibility to the zone between respondents in Outer London and those from beyond the M25, with around a fifth saying it is now easier, one fifth more difficult. The majority state that it is the same. Those who drive into the CCZ are more polarised, just over a quarter report an 'easier' journey (27%), with similar numbers reporting 'more difficult' trips.
- As with Inner London, those in Outer London and beyond the M25 report a fall in the frequency of meetings or social gatherings with friends and family in the zone. The proportion who meet either more often or the same amount after the introduction of the scheme has actually fallen from the expected level by 21% points (86% expected, 65% actual).

- When comparing those who drove into the zone before the introduction of the CCS against those who drove in 2003, 7% now drive who didn't, while 56% of those who don't drive in the CCZ now, say they did do in 2002 (although the majority of them did so only occasionally). The impact on CCZ drivers is polarised, with around half saying they have now adjusted their travel patterns, while the remaining half report no changes as a direct result of the CCS.
- Those in Outer London and beyond the M25 are almost identical in reporting that their journeys are quicker overall since the introduction of the CCS.
- A higher proportion than expected in Outer London and beyond the M25, say that they now spend more time at home since the introduction of the scheme (9% expected to do so, 17% report actually doing so). Those particularly affected are in the lower household income band below £20,000 with 29% spending more time at home since the introduction of the CCS. A quarter of those who report any change say that it is due to the introduction of the scheme.
- It costs £5 per day for respondents from Outer London and beyond the M25 to drive into the congestion charging zone and the majority find the charge affordable. In Outer London around three-fifths cover the cost of the charge themselves, while for most of the remainder the costs are met by their employer. This is significantly different to those from beyond the M25 where 48% have to cover the cost of the charge themselves, compared to 53% who have the costs covered by their employer.
- Of those who travel into the CCZ by car and have personally paid any charges, approaching two-thirds say the cost of the charge is 'affordable' (63%), a 19% increase on the expected level.
- One quarter of Outer London respondents have made a change to their selected journey following the introduction of the charging scheme, rising to almost a third of respondents living beyond the M25. The majority of these have changed from one form of public transport to another. A total of 26 Outer London respondents and three from beyond the M25 have switched from the car to other modes of travel.
- Overall, amongst Outer London respondents, there has been a perceived net improvement in the amount of time spent travelling on their selected journey, with 18% feeling that they spend less time travelling now compared with 14% who feel their journey takes longer. A significantly higher proportion of respondents who drive report that they now spend less time travelling than those who did not drive.
- In contrast to the CCZ, Inner and Outer London, there has been a perceived net increase amongst respondents living beyond the M25 in the amount of time spent travelling on the selected journey to the charging zone, with 21% feeling that they spend more time travelling now compared with 19% who feel their journey is quicker.

2.11. Experience of 'frequent' travellers into/within the charging zone during charging hours

- 'Frequent' travellers are defined as respondents that travelled at least once a month into or within the zone by any mode during charging hours since the scheme was operational.
- Inner London respondents who travel frequently into the zone are particularly positive towards the scheme, being more likely to say that they have gained, both personally and as a household, and that it is easier to travel within the zone.
- Drivers from Inner London who drive into the zone at least three times a week for their selected activity are less likely to have changed their driving habits since the introduction of the scheme, with 83% still continuing to do so.
- Weekly travellers to the zone from Inner London during charging hours are significantly more likely to note less congestion (36%), as a benefit of the scheme than infrequent travellers (27%).
- Inner Londoners who food shop within the zone (10%) are doing so less frequently than they did before the introduction of the scheme (69% now do so at least once a week, compared to 89% in 2002).
- Around 5% fewer respondents, both from Inner London and within the zone itself, are visiting family and friends at least weekly in the zone now than before the scheme was introduced.
- The overall proportion of Inner London respondents who travel into the zone during charging hours for leisure activities has decreased (from 37% to 29%), the number who are doing so at least once a week has remained the same (71 respondents).
- Although the proportion of Inner London respondents travelling into the charging zone for services or facilities remains similar to 2002 (around 10%), they are more likely to be doing so at least weekly (53%) compared to before (43%). There has also been a significant increase in travel for these activities amongst respondents living in the zone, both overall (from 64% to 74%) and in terms of frequency (with 65% making such journeys at least once a week compared with 55% prior to the scheme).

2.12. Experiences of 'infrequent' travellers into the charging zone during charging hours

- 'Infrequent' travellers are defined as respondents that travelled less than once a month into or within the zone during charging hours since the scheme was operational.
- Infrequent travellers to the zone from Inner London are significantly more likely to say that the scheme has had no impact on them personally (59% compared to 36% overall) or their household (67% compared to 51%), and have been less likely to note any change in travel time.

- Those living in Inner London who drove infrequently into the zone before the scheme are now more unlikely to drive into the zone, with 83% no longer driving into the zone during operational hours (compared to 57% of frequent drivers).
- Respondents from Inner London who travel infrequently into the zone for their selected activity are significantly less likely to say that their overall travel experience has deteriorated (14% compared with 19% overall).
- Respondents, both from the CCZ and Inner London, visiting family and friends as the main purpose of their selected journey are making such trips less frequently following the introduction of the charging scheme.

2.13. Drivers into and within the charging zone

Behaviour

- Overall little has changed in terms of car use by charging zone respondents, with only 12% of zone respondents who drove in the zone during charging hours before the scheme no longer doing so. Charging zone residents driving in the zone are more likely to be from AB households (63% compared to 48% overall).
- Drivers from Inner London have been more affected by the scheme. Of those who drove into the zone before the introduction of the scheme, 77% say that they have adjusted their travel as a result of the scheme, with 35% no longer driving into the zone during charging hours. The impact varies by journey purpose, for example the proportion who ever use their car to commute to and from work has fallen by 10% points since 2002 compared to a 3% drop amongst charging zone respondents.
- The impact of the scheme has not been homogeneous across all Inner London drivers, with 43% of respondents from AB households within Inner London now driving into the charging zone compared with only 17% from DE households.
- Amongst drivers from Outer London and beyond, 56% who drove into the charging zone prior to the scheme (albeit evenly occasionally) no longer do so, while 7% now drive into the charging zone who did not in 2002.

Congestion and access

- A quarter of respondents from Inner London who drive have benefited from the scheme and find it easier to travel to the charging zone now, however these are balanced by a similar proportion experiencing more difficulty. These findings are also echoed amongst drivers to the charging zone from outer London and beyond.
- Drivers are more positive in noticing a significant ease in congestion. They are also more likely to feel that access to London as a whole has improved.

Affordability

- Affordability of the charge amongst Inner London respondents who drive into the zone does not seem to be affected by the frequency with which they do so, with 26% who drive in weekly and 17% who drive in less than once a month saying it is difficult to pay.

- Similar views are expressed by drivers who live within the zone, with 22% saying that they find it difficult to afford the charge. This may relate to payment of the annual charge in a lump sum.
- Nearly half of drivers from AB households within the zone have paid an annual charge.
- Respondents who live within the zone from DE households are four times as likely to say they have difficulty paying the charge than those from AB households (42% compared with 11%).

Family and friends

- Respondents living in the zone who drive are more likely to have made changes, both in terms of frequency and travel arrangements, for visiting family and friends.
- Respondents from Inner London who drive to the zone are more likely to say that it is difficult to visit family and friends than before the introduction of the charge, compared with those living in the zone, and are now likely to do so less often.

3. Neighbourhood change

Congestion charging zone neighbourhoods

Respondents in the Congestion Charging Zone (CCZ) say that their area has changed for the better since the scheme was introduced. Those in Holborn report the greatest improvement of all the neighbourhoods covered by the survey.

The most positive impact of the scheme is perceived as the easing of congestion (55%) and again respondents from Holborn are significantly more likely to report an improvement (68%).

The most negative impact of the scheme within the zone is perceived to be an effect on trade for local business (33%), however, this is at a level anticipated by respondents before the scheme was introduced. Respondents in the West End are more likely to say that trade has deteriorated (51%). However it should be noted that a large proportion of respondents say they are unable to comment on the impact of the scheme on local trade (32%).

Inner London neighbourhoods

In contrast to the congestion charging zone, the majority of Inner London respondents feel their local area is unchanged, although one in five believe it is worse since the introduction of the scheme.

When asked to rate a list of aspects in their local area, on all counts a greater proportion of respondents say they have not actually seen any change at all. Amongst Inner London respondents who expressed some changed, the availability of parking, congestion, pollution, noise (linked to the rise in traffic) and sense of safety are felt to have all deteriorated. There are specific mentions of an increase in congestion on the boundary and unease at the increase of 'strangers' in local communities.

Inner London respondents are positive about the change in public transport provision in terms of greater availability (40%) and reliability (31%). This is particularly the case in Hoxton and Peckham, whilst those in Bowes Park are much less complimentary. Non-car owning households and respondents aged 55+ (who tend to be more frequent public transport users) are also more favourable about the change than other groups.

Fewer Inner London respondents expected such improvements in public transport (of those who felt availability would be worse after the scheme, only 15% say this is actually the case, while 28% say it has improved), although the same applies for the increase in congestion and the perceived lack of places to park.

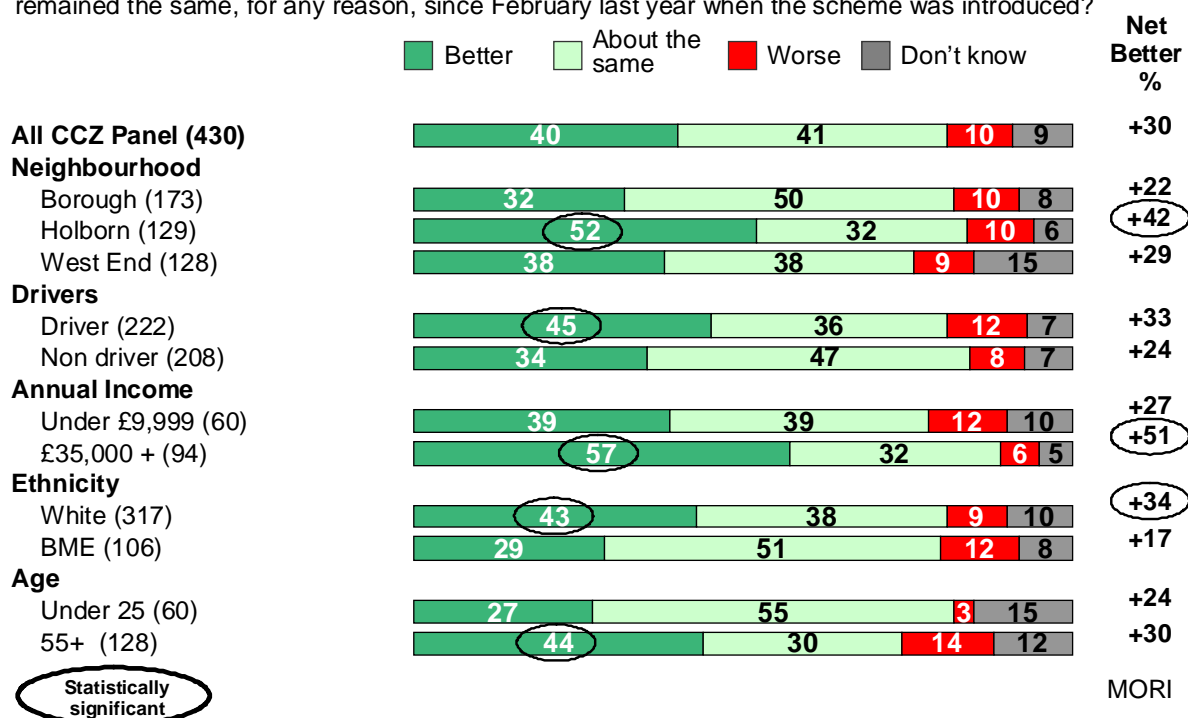
3.1. Congestion charging zone – changes in local area

More respondents in the CCZ neighbourhoods feel their local area has improved than deteriorated since the introduction of the congestion charging scheme (40% compared to 10%).

There are some clear differences by neighbourhood, with those living in Holborn the most positive and those in Borough the least positive. Of the main sub-groups, drivers, higher income households and the over 55s are significantly more likely to say their local area has improved (see Figure 3.1).

Figure 3.1. CCZ: Change in local area

Taking everything into account, would you say this area as a place to live has got better, worse or remained the same, for any reason, since February last year when the scheme was introduced?



Among CCZ respondents who feel their neighbourhood has improved, many of the reasons for this are directly related to the congestion charging scheme. For example, three-quarters of these respondents spontaneously cite eased traffic, fewer cars, better traffic flow, while 15% (the next highest mention) refer to improved bus services which are faster or more frequent (see Figure 3.2).

The only good side of the congestion charge is that it reduces traffic in the area. The unfortunate problem is the penalty fines for forgetting to pay for a day – which is not deliberate on the part of the drivers

Borough, Primary/pre-school children, AB, 35-54, Male, Working, Driver

There is less congestion but fewer people willing to visit me due to congestion charge

West End, C1C2, 55+, Female, Working, Non-driver

Buses are more frequent and reliable now – presumably due to congestion charging

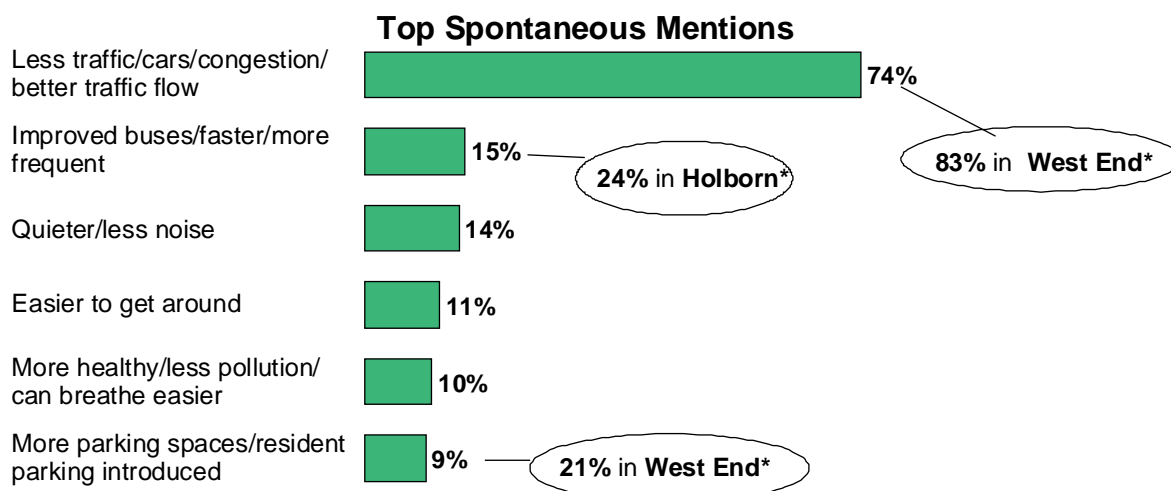
West End, C1C2, 55+, Female, Working, Non-driver

Local services are better, e.g. Recycling bins. Public transport links are better. Less threatening location. Borough market means more visitors to area. Police are tougher on hooligans

Borough, Primary/pre-school children, AB, 25-34, Male, Working, Driver

Figure 3.2. CCZ: Improvements in local area

Why do you say your local area has improved?



Statistically significant

*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

Base: All CCZ panel who say local area has got better (164)

MORI

Again, there are some neighbourhood differences. For example, a significantly greater proportion in the West End cite the reduction in congestion and more parking spaces, which may be related to the perceived negative impact of the scheme on local retail businesses as outlined later.

Some example of comments made by respondents about improvements to their local area include:

Been quieter here, my breathing problems have been better

Borough, Retired, DE, C1C2, 55+, Male, Not working, Non CCZ Driver

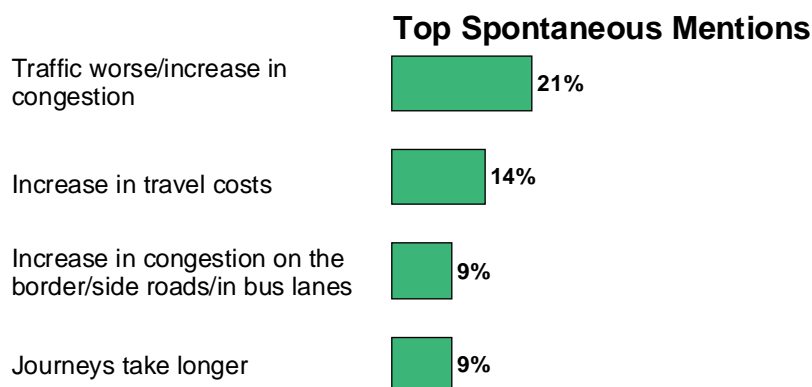
Road works 12 months ago are now over so things are better. This was a conspiracy 12 months ago to make people feel better when scheme started then roadworks ceased just before start of season. Less traffic although it is building up again

Borough, Over 30 no children, C1C1, 35-5, Male, Working, Driver

Among the minority of CCZ respondents who feel their local area has deteriorated since the introduction of the scheme, the main reason given for this is an increase in congestion and travel costs.

Figure 3.3. CCZ: Deterioration in local area

Why do you say your local area has got worse?



Statistically significant

Base: All CCZ panel who say local area has got worse (41)

The following are some illustrative comments made by respondents who feel their locality has deteriorated:

There is less traffic, fewer people are coming into the area due to the congestion charge – it’s affected lots of businesses negatively in the area.

Also, not having friends and family visiting – having to pay hefty fines when I forget to pay the weekly congestion charge

Borough, Secondary school, DE, 35-54, Female, Not working, Driver

It is the money issue – you have to pay the charge, pay for parking, which is usually available at a reasonable rate, speed cameras, all sorts of traps to get money off you. It is a crippling tax on people in addition to road tax and insurance

Borough, Over 30 no children, C1C2, 35-54, Female, Working, Non-driver

Social life has got worse. Friends no longer visit during day, but wait until evenings and weekends. Local shops have been affected, and prices have been going up to compensate for less trade (especially coffee shops etc)

West End, 30 and under no children, C1C2, 25-34, Female, Working, Non-driver

Too restrictive parking, not enough spaces. Traffic system is too punitive. Fines are too high, too many traffic wardens. Starting to live in a police state

West End, Secondary School, C1C2, 25-34, Female, Not working, Driver

As a cyclist you have to be twice as vigilant as before. The buses are faster, drivers demonstrate their powers of acceleration. It is much more dangerous on zebra crossings

Holborn, Retired, C1C2, 55+, Male, Not working, Driver

Getting out of Brook Drive at 7am is very hard – greater parking problems in the area

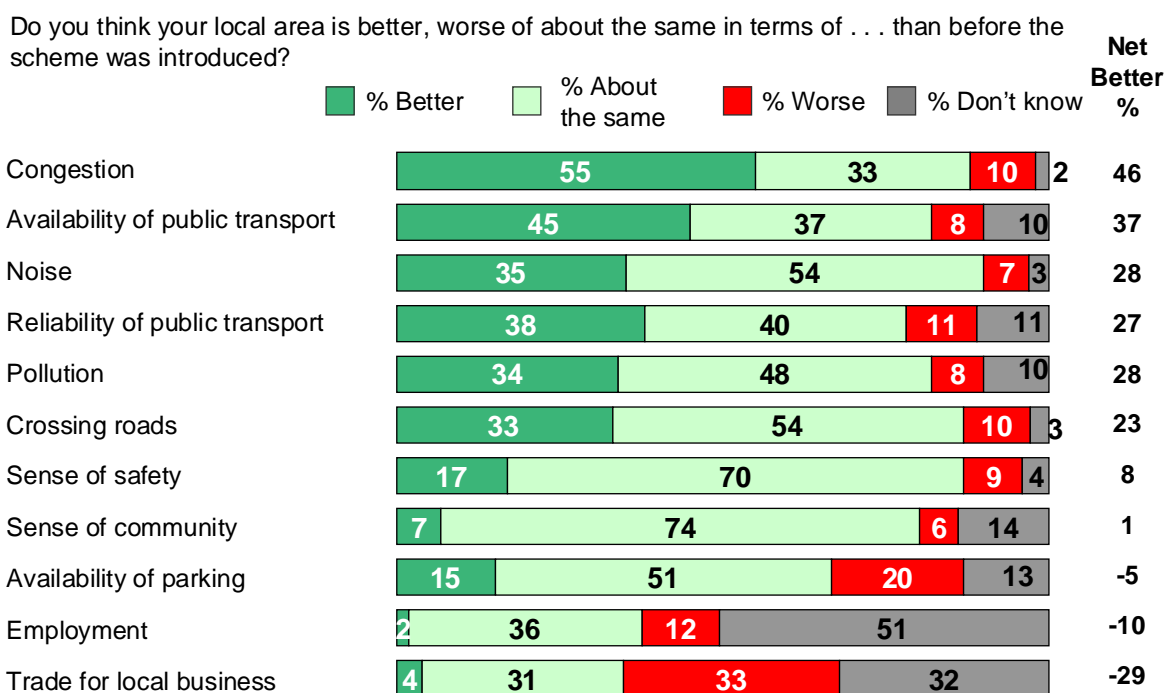
Borough, AB, 35-54, Female, Not working, Driver

Too many vehicles around here because of lots of vehicles avoiding congestion charge and it's more difficult to cross the road than before. I have to leave home earlier now to drop my children at school. And before I could drive to Elephant and Castle easily for shopping during the week, but not now

Borough, Primary/pre-school children, C1C2, 25-34, Male, Working, Non-driver

In line with the overall reported improvement in the CCZ, respondents are generally positive about a range of specific aspects discussed (see figure 3.4). Over half state that the level of congestion has improved locally (55%), while 10% say it has got worse. Related to the reduction in traffic, noise, pollution and crossing roads are all reported to have eased on balance. Respondents have seen improvements in public transport availability and reliability in their local areas not yet seen in London. However, by contrast, there are mixed views on trade for local business with a third reporting it to have got worse.

Figure 3.4. CCZ: Views on different aspects of local area



Statistically significant

Base: All CCZ panel respondents (430)

MORI

Some examples of respondents' comments about their local area include:

There is a positive effect on the environment. Less traffic and less pollution, but local businesses are losing out

Holborn, Secondary school, DE, 35-54, Male, Working, Driver

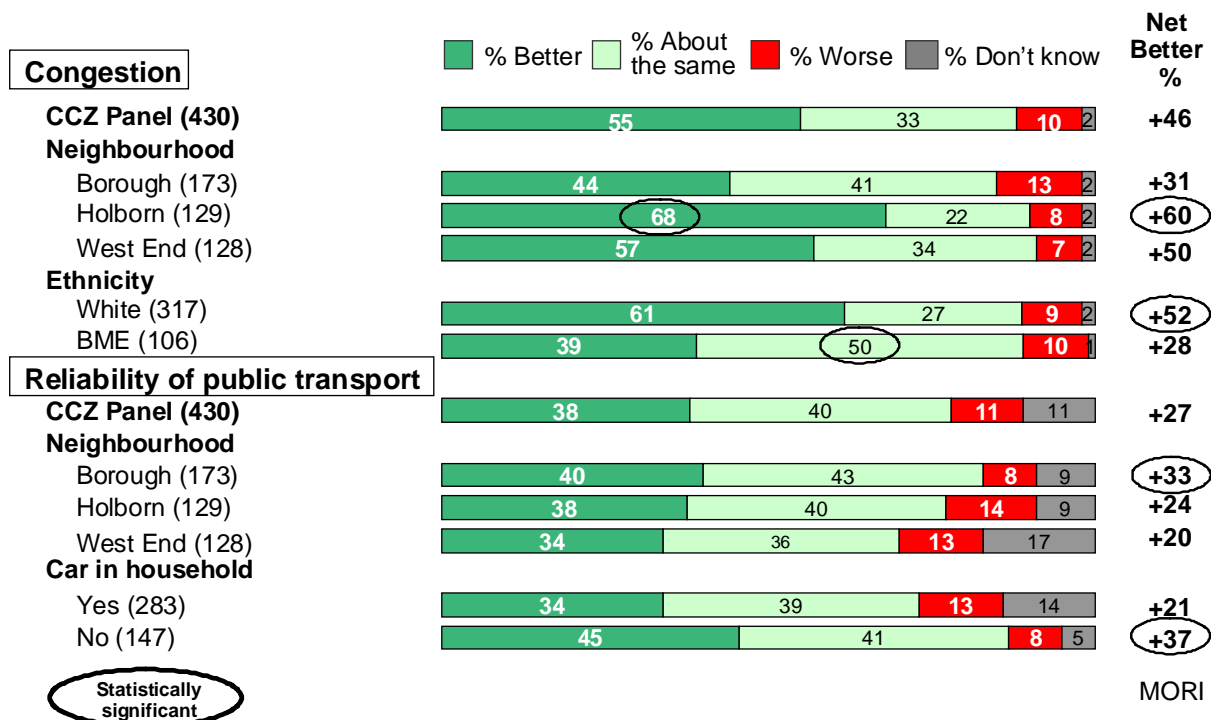
The edge of zone, especially Marylebone Road, is more congested and more difficult to cross

West End, Secondary school, C1C2, 55+, Male, Working, Driver

Crime seems to have reduced – mugging etc, as fewer visitors to the area. Parking for tradesmen (e.g. plumbers etc) easier near the property they're working on

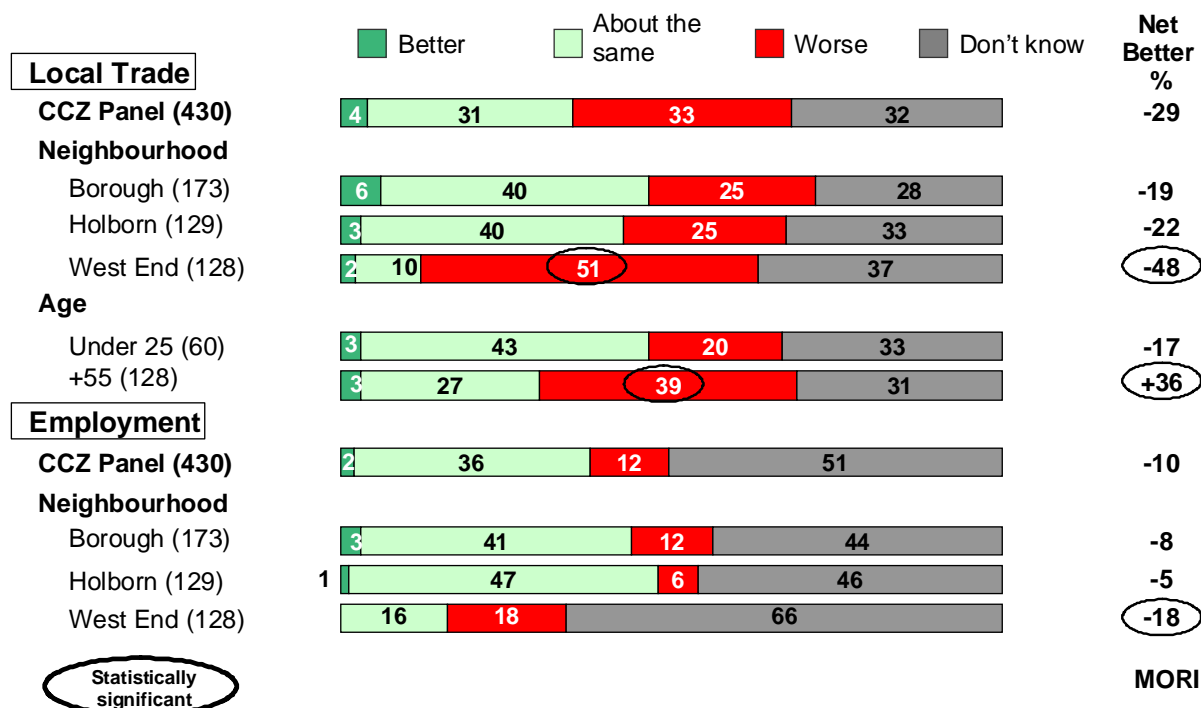
West End, 30 and under no children, C1C2, 25-34, Female, Working, Non-driver

Figure 3.5. CCZ: Congestion and public transport



- Respondents in Holborn, who report the greatest improvement in their local area since the scheme was introduced, are also most likely to say congestion has eased (68% compared to 57% in the West End and 44% in Borough, as shown in Figure 3.5).
- BME respondents are much less likely to have seen an ease in congestion, with the majority reporting no change
- On balance, respondents in Borough report the highest net improvement in the reliability of public transport (i.e. the number of people who say it has got better than gone worse).

Figure 3.6. CCZ: Local trade and employment



Respondents in the West End are most likely to report a deterioration in local trade (51% against 25% in the other two neighbourhoods).

Examples of comments given by respondents about local trade are shown below:

It has been difficult for local market traders. The shops at Hercules Road have been badly affected – the construction work at the junction does not help either – it is difficult to get buses to some parts of London due to re-routing of some buses. It is also difficult to get taxis to stop

Borough, Retired, AB, 55+, Female, Working, Driver

My husband has a stall in the area. He is doing less trade

Holborn, Secondary school children, DE, 35-54, Female, Working, Non-driver

[Shoppers] Don't like coming into congestion charge zone – can park just outside zone (on edge) but parking there more difficult and expensive

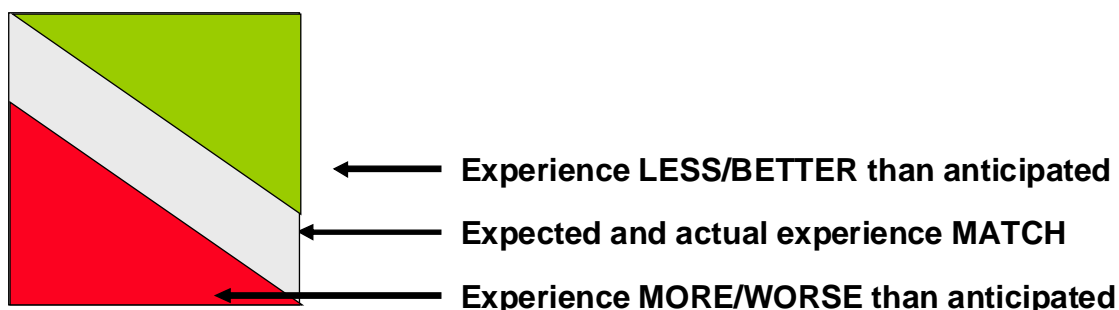
West End, C1C2, 55+, Female, Working, Non-driver

The opinions of respondents to their local area since the introduction of the charging scheme have also been reviewed in context of their expectation, as expressed in the 'before' survey.

This has been undertaken by comparing the respondent's expectations of the likely impact of the scheme to their neighbourhood, across a range of criteria, with how they feel now.

3.2. Congestion charging zone – expectation compared to experience

Chart Explanation: The following table should be read by column rather than row. The response given in 2002 is presented (across the top) against the response given in 2003 (running down the side).



Example: For those in the green boxes, actual experience is better than anticipated; whilst for those in the red boxes, the experience has been worse than anticipated. The grey diagonal column indicates the proportion of respondents whose expected and actual experience matches. The following table shows that, for example, 31% of CCZ respondents said congestion would get better in 2002 and agree it has done so. The table below then tracks the remaining respondents, highlighting that overall 55% feel congestion is better including 6% who said it would get worse in 2002.

A greater proportion of CCZ respondents say congestion has eased than anticipated this outcome in 2002. Similarly, fewer have actually experienced increasing congestion than anticipated in 2003.

Table 3.1. CCZ : Congestion

	Better (211)	Same (99)	Worse (63)	Can't say at this time (57)	Total (430)
	%	%	%	%	%
Better (237)	31	11	6	6	55
Same (143)	14	8	6	6	33
Worse (41)	3	3	2	1	10
Don't know (9)	1	0	0	1	2
Total (430)	49	23	15	13	100

Source: MORI

The majority of those who expected to see an improvement in the availability and reliability of public transport have experienced this. Of those who anticipated no change, more see improved than worse services, with most of those anticipating worse services saying it had actually improved or stayed the same.

Table 3.2. CCZ : Availability of public transport¹

	Better (178)	Same (118)	Worse (44)	Can't say at this time (90)	Total (430)
	%	%	%	%	%
Better (193)	21	12	4	8	45
Same (159)	14	10	4	8	37
Worse (35)	2	3	1	2	8
Don't know (43)	4	2	1	2	10
Total (430)	41	27	10	21	100

Source: MORI

Table 3.3. CCZ : Reliability of public transport

	Better (178)	Same (118)	Worse (44)	Can't say at this time (90)	Total (430)
	%	%	%	%	%
Better (162)	17	9	4	8	38
Same (171)	16	11	4	9	40
Worse (48)	4	4	1	2	11
Don't know (49)	4	4	1	3	12
Total (430)	41	27	10	21	100

Source: MORI

¹ In 2002, respondents were asked their views about 'availability and reliability of public transport'; while in 2003 these service attributes have been rated separately.

In terms of parking, the reality has not lived up to expectation with most of those who expected a change for the better actually saying parking had stayed the same. Of those who expected no change, most say this is the case. Of the group who reported negative expectations in the 2002 survey, most have seen no change but more have experienced problems rather than improvements.

Table 3.4. CCZ : Availability of Parking

	Better (115)	Same (179)	Worse (59)	Can't say at this time (77)	Total (430)
	%	%	%	%	%
Better (65)	6	6	1	2	15
Same (221)	12	23	7	9	51
Worse (86)	4	7	4	4	20
Don't know (58)	6	4	1	3	14
Total (430)	27	42	14	18	100

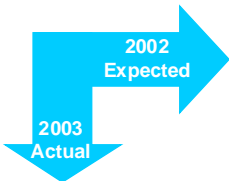
Source: MORI

Before the charging scheme was introduced, greater numbers of respondents in the CCZ neighbourhoods felt that local trade and employment opportunities would be worse following its introduction than believe is now the case (Tables 3.5 and 3.6). More also felt these aspects would improve than now say this is the case. A third are undecided on the impact the scheme has made to local trade.

Table 3.5. CCZ : Trade for local business

	Better (40)	Same (126)	Worse (155)	Can't say at this time (109)	Total (430)
	%	%	%	%	%
Better (18)	1	1	1	2	4
Same (133)	3	8	11	10	31
Worse (141)	3	11	13	6	33
Don't know (138)	3	10	10	9	32
Total (430)	9	29	36	25	100

Table 3.6. CCZ : Employment

	Better (24)	Same (184)	Worse (94)	Can't say at this time (128)	Total (430)
	%	%	%	%	%
Better (7)	0	1	0	1	2
Same (153)	2	16	7	10	35
Worse (51)	2	3	3	3	12
Don't know (219)	2	22	10	16	51
Total (430)	6	43	22	30	100

Source: MORI

Half of charging zone respondents are unsure of the impact that the scheme has made, if any, to local employment, significantly more than were undecided before the scheme was introduced.

3.3. Inner London – changes in local area

The majority of Inner London respondents say conditions in their local area are about the same as before the scheme was introduced (63% compared with 41% in the CCZ neighbourhoods). Among those who report a change for any reason significantly more say this is a negative rather than positive one (19% compared to 12%).

Transport, in particular, buses have improved. Central London is a bit quieter and a bit more pleasant

Peckham, Primary/pre-school, AB, 35-54, Female, Working, CCZ driver

The roads are cleaner, and when I go shopping the hassles and stress are less

Peckham, Over 30 no children, C1C2, 35-54, Female, Working, Non CCZ Driver

Fellow passengers are much happier on the bus

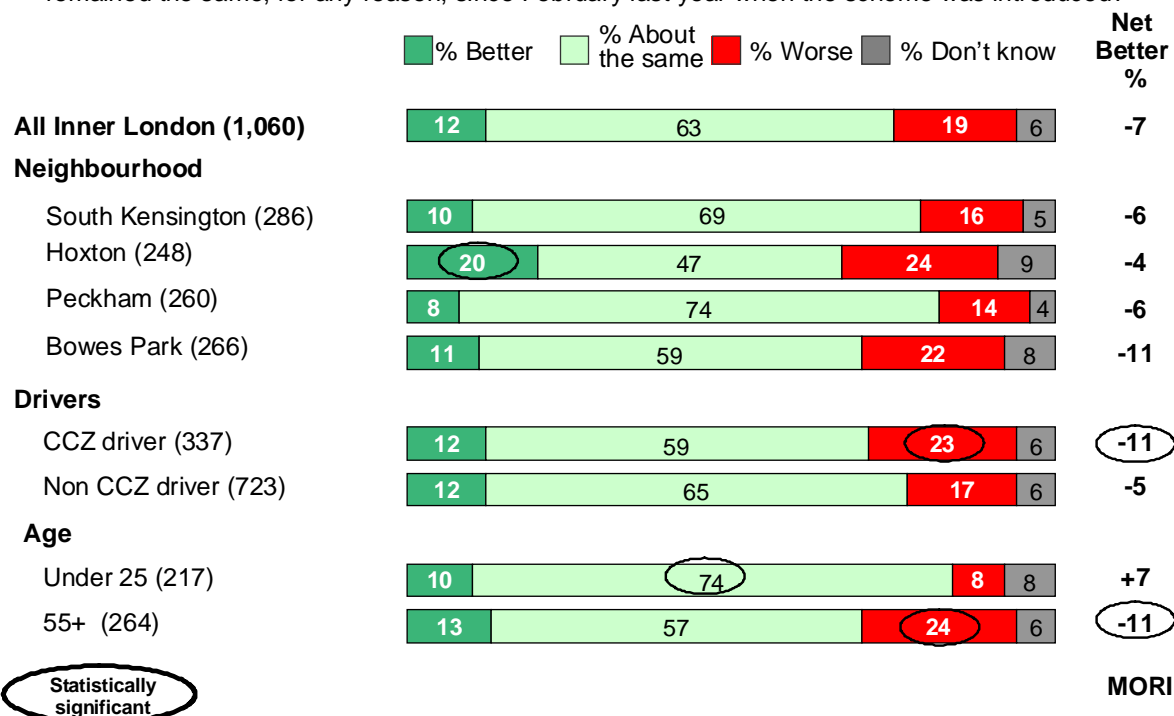
Peckham, Over 30 no children, AB, 35-54, Female, Working, Non CCZ Driver

Bus services vastly improved – frequency of buses is wonderful

Peckham, Over 30 no children, AB, 35-54, Female, Working, Non CCZ Driver

Figure 3.7. Inner London: Change in local area

Taking everything into account, would you say this area as a place to live has got better, worse or remained the same, for any reason, since February last year when the scheme was introduced?

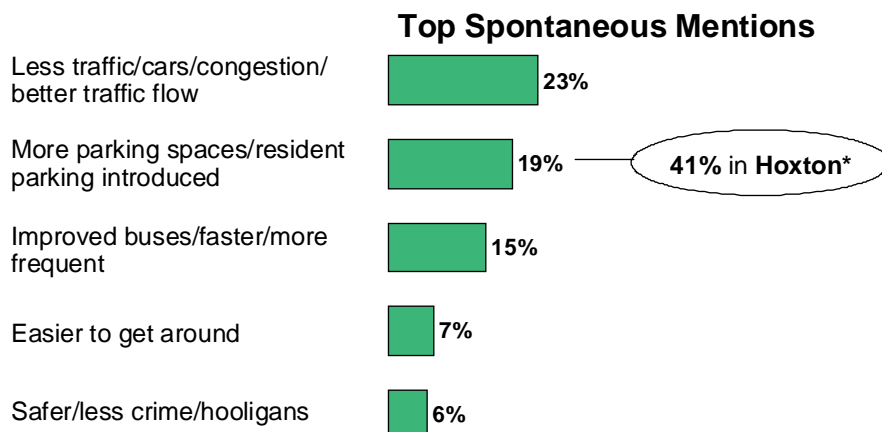


Forty-four per cent of respondents from Hoxton report change (the highest recorded in all the neighbourhoods), though they are divided about whether this is for the better or worse (20% and 24% respectively). Those who drive into the zone from Inner London are more likely to say their area has deteriorated. The over 55s are particularly negative with a quarter feeling their area has deteriorated (see Figure 3.7).

Inner London respondents are much less likely than CCZ respondents to spontaneously mention the reduction in traffic as the reason why their local area has improved (23% compared to 74% in the zone), although it is still the most commonly cited (see Figure 3.8). Respondents in Hoxton are more likely than other groups to refer to the increased number of parking spaces and the introduction of resident parking (41% compared to 19% overall).

Figure 3.8. Inner London: Improvements in local area

Why do say you local area has improved?



Statistically significant

*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

Base: All Inner London residents who say local area has got better (128)

Some illustrative examples of comments made by respondents about change in their local area include:

A little better because it is quiet. No more traffic but the buses have become crowded. It's worse this way with the buses in the morning full

Hoxton, DE, 25-34, Female, Not working, Non CCZ Driver

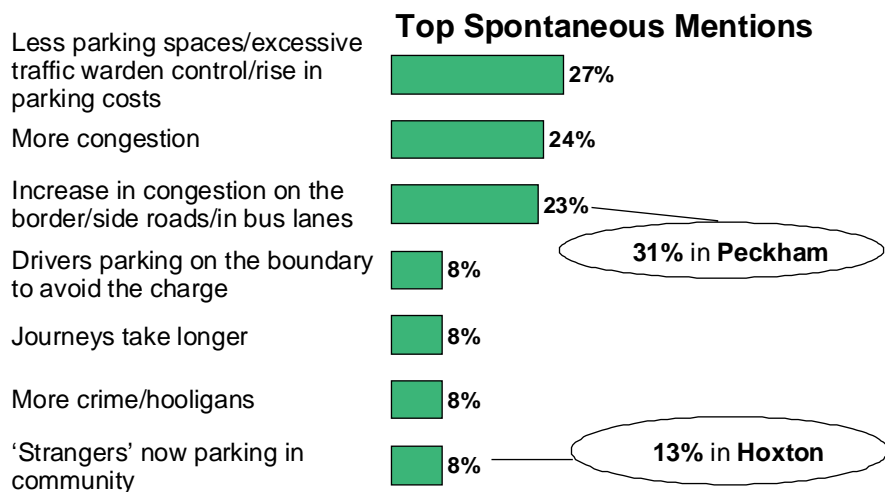
I think it is more to do with more buses running. Improved bus service really, more consistently getting to work on time rather than different times

Peckham, DE, 35-54, Male, Working, Non CCZ Driver

Parking is an important but unanticipated issue in terms of respondents' experience of the scheme and especially referred to largely when citing why their local area has deteriorated. Over a quarter of Inner London respondents cite fewer parking spaces, excessive traffic wardens or a rise in the cost of parking (Figure 3.9). Respondents in Hoxton are more aware of 'strangers' parking in their neighbourhoods (related to a rise in the number of drivers from outside the community parking their vehicles and finishing journeys to the zone on foot or by public transport) with one in eight from Hoxton spontaneously mentioning this. The sense of safety in the Inner London neighbourhoods is thought to have deteriorated (18% say this across the Inner London neighbourhoods, with only 6% reporting an improvement).

Figure 3.9. Inner London: Deterioration in local area

Why do you say your local area had deteriorated?



Statistically significant

*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

Base: All Inner London residents who say local area has got worse (201)

Respondents were asked whether a series of different aspects in their local area have changed since the introduction of the scheme. As can be seen in Figure 3.10, Inner London respondents are most positive about public transport provision with three in ten or more saying the provision and availability of public transport has improved. However, on most other aspects a greater proportion of respondents report, on balance, a negative change. This is particularly the case for availability of parking (already mentioned as a trade problem), congestion, pollution and noise (related to the perceived increased in traffic) and sense of safety.

For local businessmen, some examples of the negative impacts of congestion charging are illustrated by the following comments made by respondents:

Parking for one, there used to be more parking spaces before the scheme began last year than now, some of the residents hardly have space to park

Hoxton, Secondary school, AB, 35-54, Female, Working, Non CCZ Driver

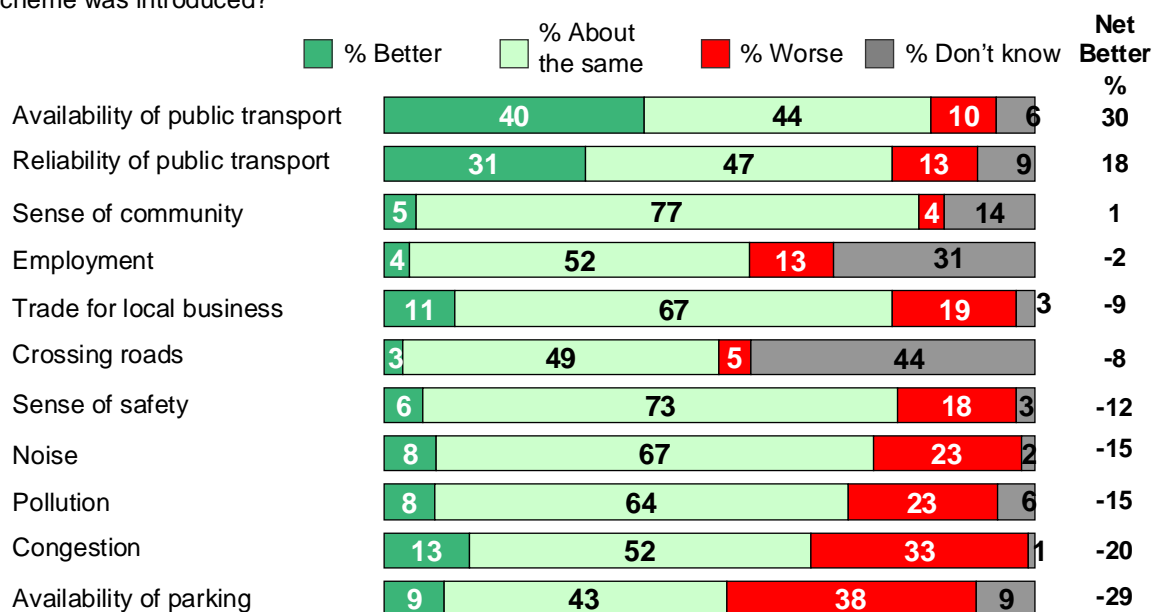
Cars are being parked [by people] that don't live here
Hoxton, Secondary school children, C1C2, 35-54, Female, Not working, Non CCZ driver

Afraid to go into Peckham. Streets are dirty, more violence, police don't care. Police say write to MP. Traffic wardens are not consistent. Local traffic signals have been changed causing more traffic in front of house.
Peckham, Retired, C1C2, 35-54, Female, Working, CCZ driver

You can't get into Bolton Road. Everything that doesn't want to go into the congestion charge zone uses our road as a cut through. There are a lot of accidents over the bridge involving buses as they go too fast.
Hoxton, Retired, C1C2, 55+, Male, Working, Non CCZ Driver

Figure 3.10. Inner London: Views on different aspects of local area

Do you think your local area is better, worse or about the same in terms of . . . than before the scheme was introduced?



Statistically significant

Base: All Inner London panel respondents (678)

MORI

- Respondents in Bowes Park are much less likely to be positive about availability and reliability of public transport, whilst the reverse is true in Hoxton and Peckham.
- As might be expected, respondents without a car in household and those aged 55+ (who are more likely to be public transport users) are also more positive about public transport (Figure 3.11).

Figure 3.11. Inner London: Public transport



Statistically significant

MORI

Examples of comments made by Inner London respondents about public transport include:

Tube in my local area has got worse, the Circle line less reliable, and Earl's Court is under renovation

South Kensington, under 25, Male, Not working, Non CCZ Driver

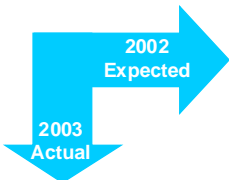
It has helped people who need to go into the zone on buses

Hoxton, Retired, C1C2, 55+, Male, Working, Non CCZ Driver

3.4. Inner London – expectation compared to experience

For Inner London respondents, experience of the availability of public transport is better than anticipated. Of those who felt public transport would be worse after the introduction of CCS, more say they have actually seen an improvement than a decline in this area. As the following table shows, when expectations do not match experience, the majority state in each case that the scheme has actually made no difference.

Table 3.7. Inner London : Availability of public transport²

	Better (229)	Same (193)	Worse (163)	Can't say at this time (93)	Total (678)
	%	%	%	%	%
Better (269)	16	11	7	6	40
Same (300)	13	13	13	6	44
Worse (65)	3	2	4	1	10
Don't know (44)	2	2	1	1	7
Total (678)	34	28	24	14	100

Source: MORI

Similarly, fewer respondents have experienced a deterioration in the reliability of public transport than predicted in 2002. However, of those who felt it would improve, most who have changed their view say there has been no impact (Table 3.8).

² In 2002, respondents were asked their views about 'availability and reliability of public transport'; while in 2003 these service attributes have been rated separately.

Table 3.8. Inner London : Reliability of Public Transport

	Better (229)	Same (193)	Worse (163)	Can't say at this time (93)	Total (678)
	%	%	%	%	%
Better (210)	12	9	6	5	31
Same (322)	15	14	13	6	47
Worse (86)	4	3	4	2	13
Don't know (60)	3	3	2	1	9
Total (678)	34	28	24	14	100

Source: MORI

In terms of congestion the majority of Inner London respondents say it has remained unchanged between the before and after surveys.

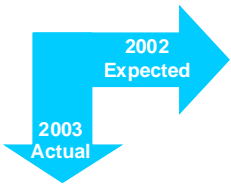
Table 3.9. Inner London : Congestion

	Better (129)	Same (150)	Worse (355)	Can't say at this time (44)	Total (678)
	%	%	%	%	%
Better (89)	4	3	6	1	13
Same (354)	10	14	25	4	52
Worse (227)	5	5	21	2	34
Don't know (8)	0	0	1	0	1
Total (678)	19	22	52	6	100

Source: MORI

In 2002, a greater proportion of respondents expected parking to be worse than has been the case. Although this is still seen as a problem as outlined earlier, the situation is not as bad as expected (see Table 3.10).

Table 3.10. Inner London : Availability of parking

	Better (49)	Same (242)	Worse (340)	Can't say at this time (47)	Total (678)
	%	%	%	%	%
Better (63)	1	3	5	1	9
Same (294)	4	16	20	4	43
Worse (258)	2	12	23	1	38
Don't know (63)	1	4	3	1	9
Total (678)	7	36	50	7	100

Source: MORI

4. Accessibility and mobility in London and the zone

This chapter reviews the effect the charging scheme has had on accessibility to shops, facilities, services and places respondents need to or would like to visit, along with the ease of travelling to and around their neighbourhoods and London as a whole.

Congestion charging zone (CCZ) neighbourhoods

Three-quarters of CCZ respondents report no change in their access to shops, facilities, services and places in their local area. Of those who perceive a change, three times as many say it has got better as say it has deteriorated (19% compared with 6%).

On balance, CCZ respondents believe there has been an improvement in access to shops, facilities, services and places they need and want to visit in London as a whole.

The perceived improvement in access to shops and facilities in both the local area and to London as a whole is most pronounced among respondents in the Holborn area.

One in two of CCZ respondents feel that travelling within the zone has got easier while only one in twenty say it has got more difficult. This relates to the reduction in congestion discussed in the previous chapter.

Inner London neighbourhoods

The majority of Inner London respondents find access to shops, facilities and places in both the local area and London as a whole the same as before the introduction of the charge (77% and 59% respectively).

While most Inner London respondents have experienced no change in the level of difficulty in getting to the zone, of those who have a greater proportion now find travelling within the zone easier rather than more difficult.

Hoxton is the most affected neighbourhood with a higher proportion of respondents finding access to shops and facilities in London worse, and travelling to the zone, more difficult than before.

Outer London and beyond the M25

Respondents from Outer London and beyond the M25 are likely to say that getting to the zone has not changed (60%). This is in part due to their relative infrequency of travelling into Central London, compared to Inner London respondents and those who live within the zone. Outer London and beyond the M25 respondents who report change are divided in their views about whether it is easier or more difficult to get to the zone (both 19%).

It should also be noted that CCZ drivers' experiences of getting to London are both worse and better than that of non drivers, whose experiences are unlikely to have changed.

Two-thirds of respondents who expected their journey to central London to be more difficult following the scheme have not found this to be the case.

4.1. Congestion charging zone - access to London as a whole

The majority of CCZ respondents say their access to shops, services and facilities in London as a whole is the same as before the scheme was introduced. Of those who do report change, more are positive than negative with the actual improvement in access greater than anticipated.

Table 4.1. CCZ : Access to London as a whole

Do you think you (will) have better, worse or about the same access to shops, facilities, services and places you need to go or would like to visit in London as a whole now compared with 12 months ago before the scheme was introduced?

CCZ	Expectation 2002	Actual Experience 2003	+/-
Base: All respondents	(430) %	(430) %	%
Better	24	20	-4
Same	44	65	+21
Worse	17	8	-9
Do not visit/No answer/DK	15	7	-8
Net Better	+7	+12	+5

Source: MORI

- Respondents who live in Holborn are more likely to say access to shops, facilities and places in London as a whole has improved (see Figure 4.1 overleaf).
- Drivers and higher income households are also more likely to feel that access to London as a whole has improved (Figure 4.2 overleaf).

Figure 4.1. CCZ: Access to London as a whole

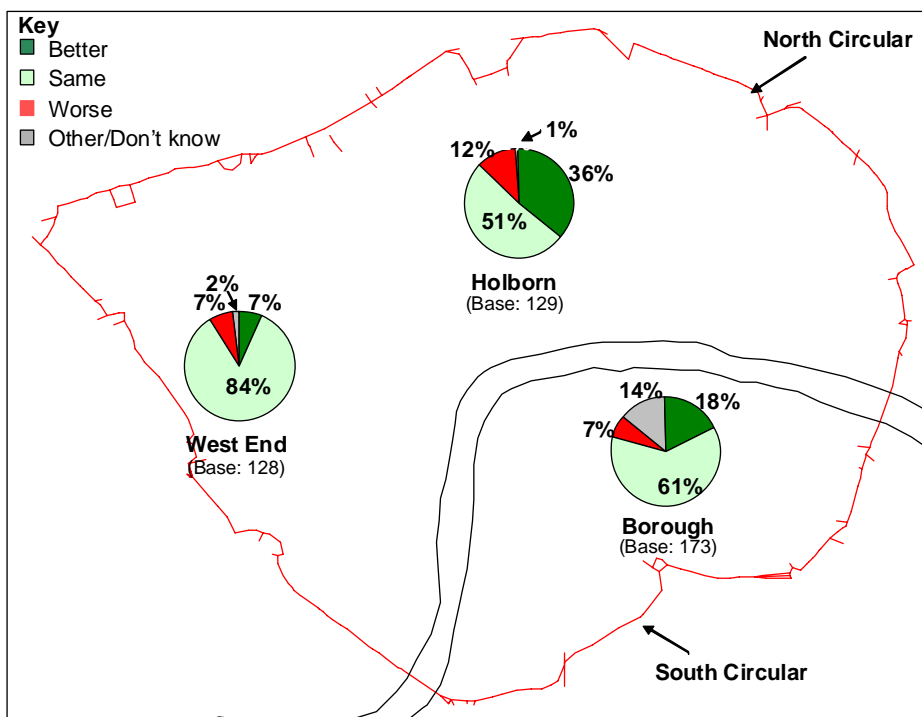


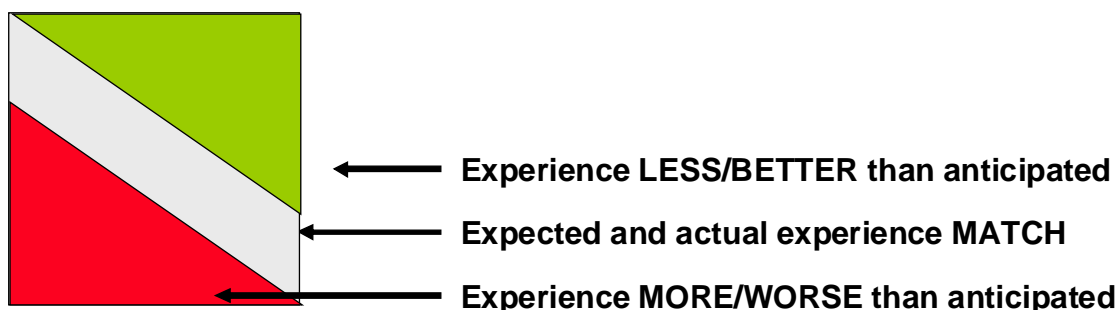
Figure 4.2. CCZ: Accessibility to London as a whole

Do you think you have better, worse or about the same access to shops, facilities, services and places you need to go or would like to visit in **London as a whole** now compared to 12 months ago?



4.2. Access to London as a whole: Expectation compared with experience

Table Explanation: The following table should be read by column rather than row. The response given in 2002 is presented (across the top) against the response given in 2003 (running down the side).



Example: The following table shows that, for example, 32% of CCZ respondents who said access was ‘the same’ in 2002 also said ‘the same’ in 2003. The table below then tracks what the remaining respondents. For those in the green boxes, actual experience of the CCS is better than anticipated; whilst for those in the red boxes, the experience has been worse than anticipated. The grey diagonal column indicates the proportion of respondents whose expected and actual experience match.

Of the 44% who expected access to be the same, the majority have experienced this. In contrast, few of those who thought it would be better or worse have found this to be the case.

Table 4.2. CCZ : Access to London as a whole

	Better (105)	Same (189)	Worse (73)	Can't say at this time (63)	Total (430)
	%	%	%	%	%
Better (86)	7	7	3	4	20
Same (279)	15	32	10	8	65
Worse (36)	2	3	2	2	8
Do not visit/ other/ DK (29)	1	3	2	1	7
Total (430)	24	44	17	15	100

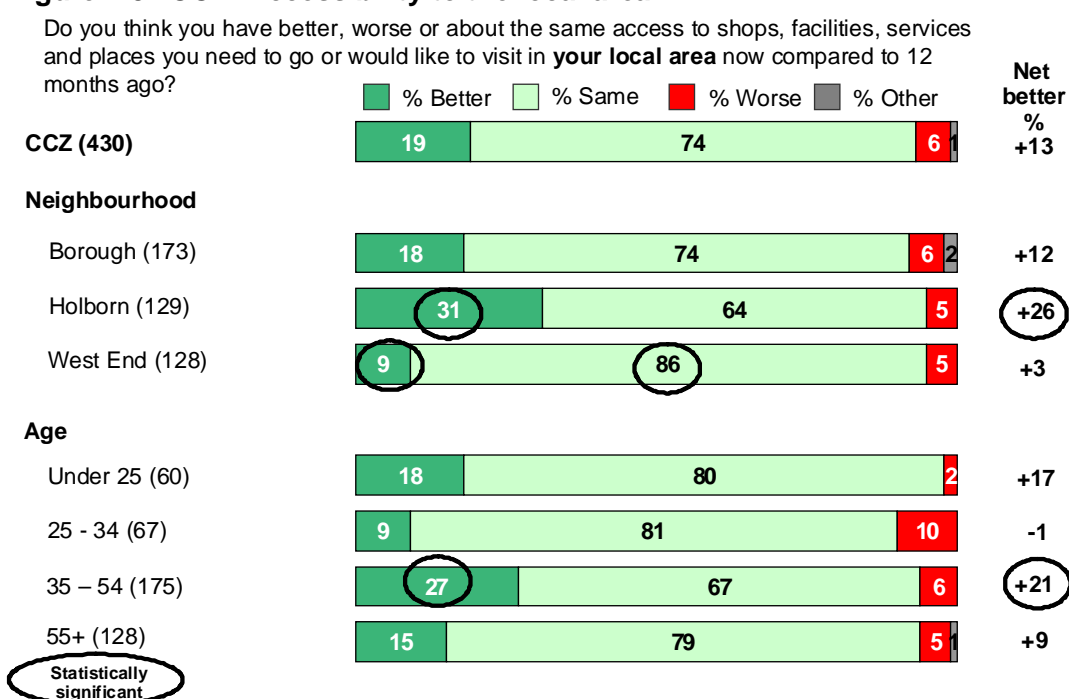
Source: MORI

4.3. Access within local area

The majority of respondents say there has been no change to access within their local area. However, those who have experienced a change are positive, with over three times as many saying local access has improved as say it has deteriorated.

- The net improvement in local access is enjoyed across all neighbourhoods in the CCZ. The improvement is most pronounced among respondents from Holborn, where 31% believe access to shops, facilities, services and places is now better within their local area.
- Respondents aged 35-54 are significantly more likely to say that access in the local area has improved.

Figure 4.3. CCZ: Accessibility to the local area



4.4. Travel within the zone

One in two respondents from within the zone feel that travelling within the zone is now easier (46%) while only one in twenty respondents feel it has become more difficult.

The groups who find travelling easier are workers, higher income groups, men, adults aged 35 and over and ABs (with many of these sub-groups of each other).

4.5. Inner London: Access to London as a whole

The majority of Inner London respondents believe access to services across London as a whole has remained the same as before the charge was introduced (59%). Before the introduction of the charge a slightly greater proportion of Inner London respondents thought the charging scheme would have a positive rather than negative effect on their access to facilities and places in general. After the introduction of the charge the reverse is true as more respondents feel that accessibility has deteriorated than improved, although fewer say it has got worse than had anticipated this (Table 4.3).

Table 4.3. Inner London – access to London as a whole

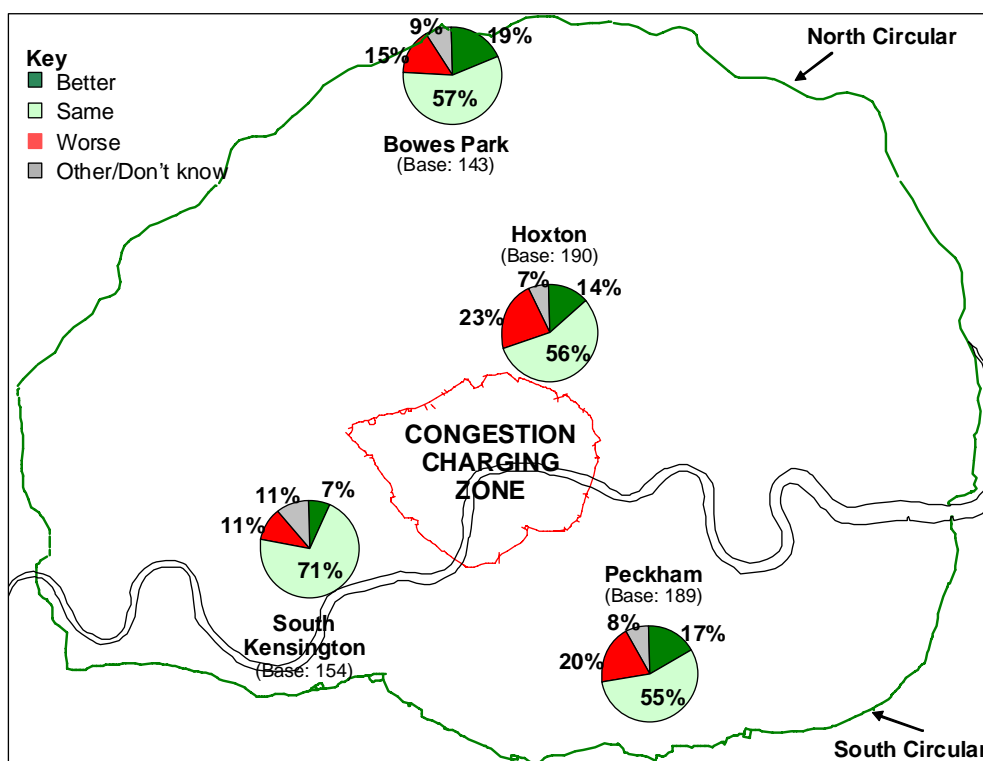
Do you think you (will) have better, worse or about the same access to shops, facilities, services and places you need to go or would like to visit in London as a whole now compared with 12 months ago before the scheme was introduced?

Inner London	Expectation 2002 (General access)	Actual Experience 2003	+/- Change
Base: All respondents	(678) %	(678) %	%
Better	30	14	-16
Same	36	59	+23
Worse	25	18	-7
Do not visit/No answer/DK	9	9	0
Net Better	+5	-4	-9

Source: MORI

- With regard to accessibility to London as a whole, respondents in Hoxton are the most likely to feel access is now worse (23% - Figure 4.4.).
- CCZ drivers from Inner London are twice as likely as non CCZ drivers to feel that accessibility to London as a whole has deteriorated, with over a quarter feeling this way (28%). Despite this, the majority of respondents (both drivers and non CCZ drivers) say they have not experienced any change in accessibility to London as a whole (52% and 63% respectively - Figure 4.5).

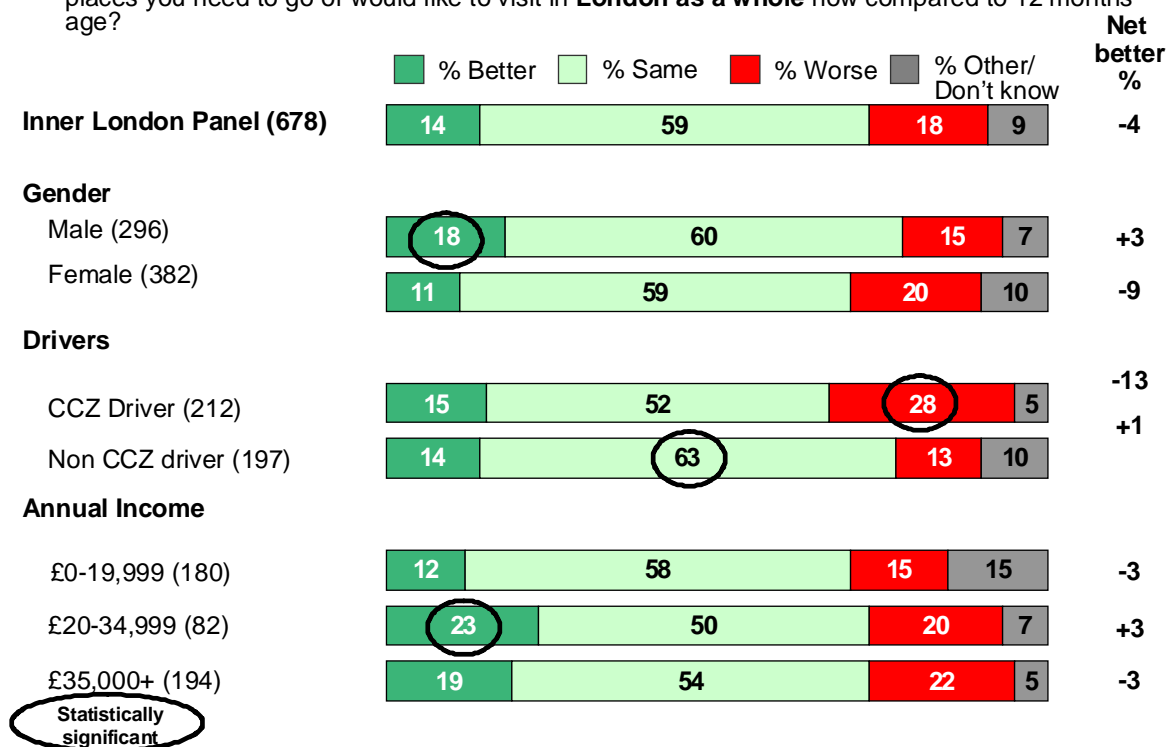
Figure 4.4. Inner London: Access to London as a whole



- A sizeable proportion of people from low income households (under £10,000 per year) say they do not access shops, facilities and places outside of their local area (15%), as a result this group are less likely to have an opinion on whether access is better or worse. Among higher income households (£35,000+) opinion is split, one in five believe access has got better and a similar proportion say it is now worse (Figure 4.5).

Figure 4.5. Inner London: Access to London as a whole

Do you think you have better, worse or about the same access to shops, facilities, services and places you need to go or would like to visit in **London as a whole** now compared to 12 months ago?



4.6. Access to London as a whole: expectation compared with experience

As for CCZ respondents, of those who expected access to London as a whole to be the same, the majority have experienced this. Furthermore, most Inner London respondents who anticipated a change (whether positive or negative) have not found this to be the case.

Table 4.4. Inner London : Access to London as a whole

	Better (202)	Same (243)	Worse (167)	Can't say at this time (66)	Total (678)
	%	%	%	%	%
Better (97)	5	5	2	1	14
Same (402)	18	23	13	5	59
Worse (121)	4	5	7	2	18
Do not visit/ other/DK (58)	2	3	2	1	8
Total (678)	30	36	25	10	100

Source: MORI

4.7. Access within local area

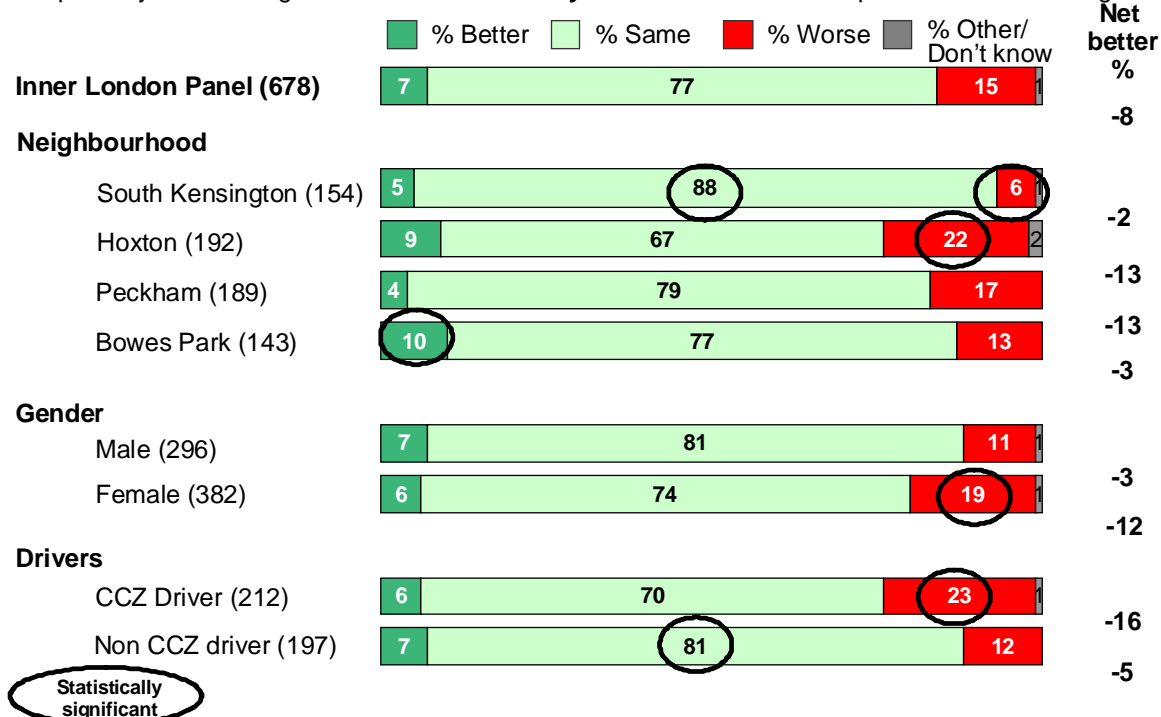
For three quarters of Inner London respondents there has been no change in access to shops, facilities, services and places within the local area (Figure 4.6). Of those who have experienced a change, twice as many believe access to have worsened rather than improved.

Although respondents from all Inner London neighbourhoods say, on balance, that access to shops, facilities, services and places in their local area is worse than before, there are some marked differences. A fifth of respondents from Hoxton say access is worse (22%) compared to one in eight in Bowes Park (13%) and just 6% in South Kensington where a particularly high proportion of respondents feel there has been no change (88%).

- CCZ drivers from Inner London and women are all more likely to say access in their local area has worsened.
- Compared to any other age group, 35-54 year olds are statistically more likely to say access in their local area is now worse.

Figure 4.6. Inner London: Accessibility to the local area

Do you think you have better, worse or about the same access to shops, facilities, services and places you need to go or would like to visit in **your local area** now compared to 12 months ago?



4.8. Getting to central London

Although one-fifth of respondents from Inner London feel it is now easier to travel into the charging zone, this is a significantly smaller proportion than had anticipated this. Around half have not experienced any change. One-fifth say that their journey to the zone is more difficult than previously, again this is slightly fewer than anticipated this would be the case.

Table 4.5. Inner London – Access to Central London

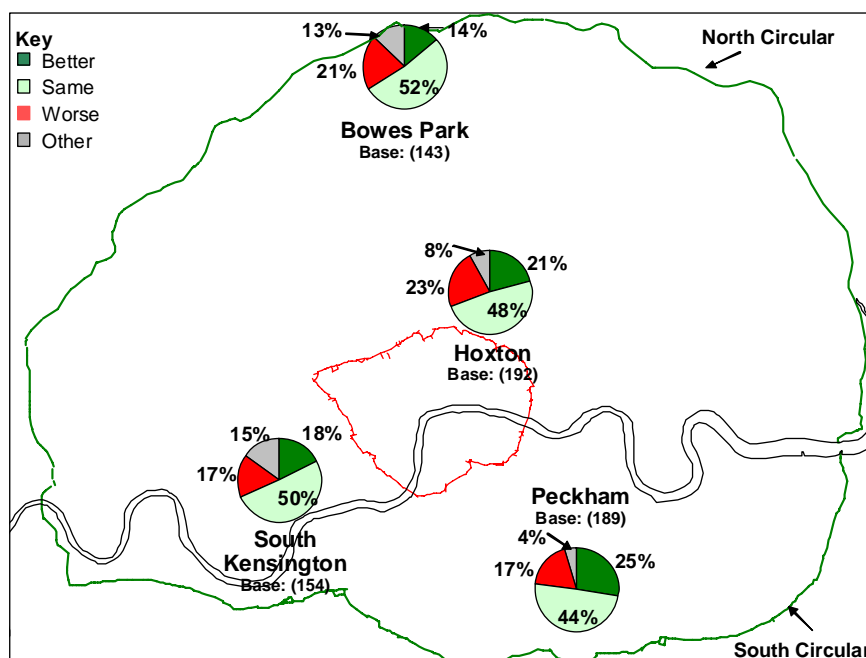
Is it (Will it feel) easier, more difficult, or about the same to get to the zone (central London) now than 12 months ago before the scheme was introduced?

Inner London	Expectation 2002	Actual Experience 2003	Change +/-
<i>Base: All respondents</i>	(678) %	(678) %	%
Easier	37	20	-17
Same	27	48	+21
More difficult	24	20	-4
Do not travel/No answer/Other	12	12	0
Net Easier	+13	0	-13

Source: MORI

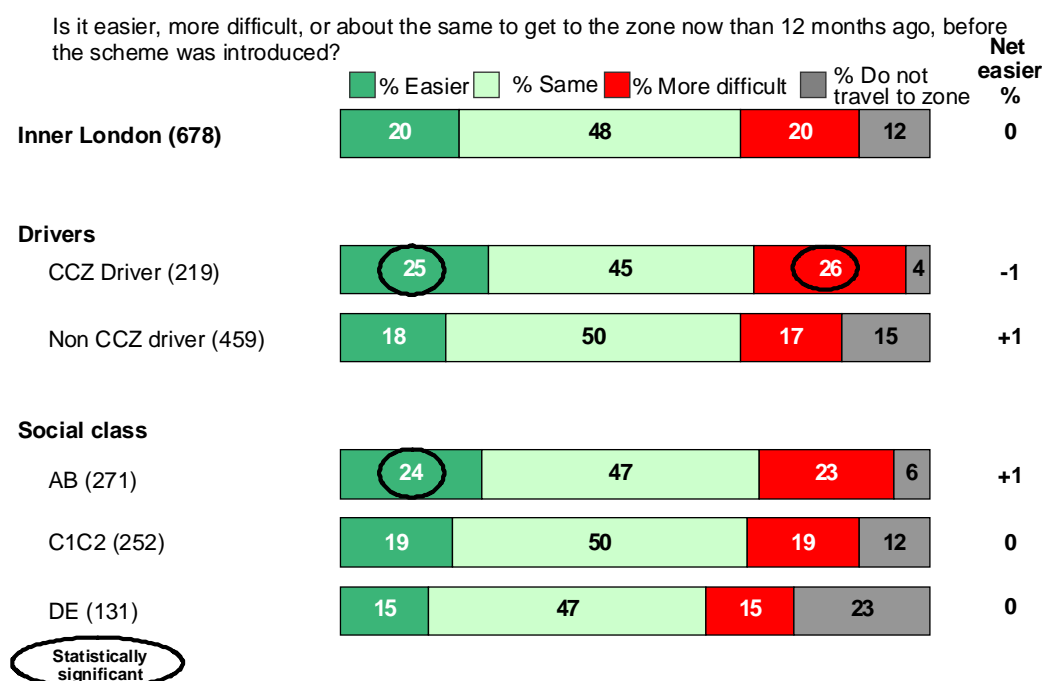
- Around half of respondents in all neighbourhoods say there has been no change in getting to central London. Respondents from the four neighbourhoods across Inner London differ in their assessment of how the charging scheme has affected their journey to the zone with those from Peckham the most positive (Figure 4.7).

Figure 4.7. Inner London: Getting to Central London



- CCZ drivers from Inner London have experienced more change in getting to central London than non CCZ drivers. A quarter of CCZ drivers have benefited from the scheme and find it easier to travel now, however these are balanced by a similar proportion experiencing more difficulty. Again, most respondents say there has not been any change (Figure 4.8).
- A quarter of respondents from social class AB now find it easier to travel into the zone, compared to just 15% from social class DE who travel into the zone (a larger proportion of which do not travel to the zone, 16% DEs compared with 4% ABs).

Figure 4.8. Inner London: Getting to Central London



Some illustrative examples of comments made by respondents include:

It is easier to drive to Westminster, there is much less congestion.
 South Ken, Over 30 no children, C1C2, 35-54, Male, Not working, CCZ Driver

It's more hassle for taking home my mother. It's easier by car and we would like to take her home, but she has to use the bus if it's in the congestion charging hours, £1 bus or £5 charge. The journey is not as spontaneous
 Hoxton, Primary/pre-school children, AB, 35-54, Female, Working, Non CCZ Driver

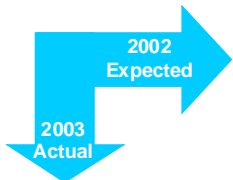
4.9. Getting to central London: Expectation compared with experience

Of those who thought the charging scheme would make it easier to travel into central London, only a minority say that this is indeed the case, while twice as many say there is no change and a smaller proportion say that it is now more difficult to travel into the zone (Table 4.6).

Just under a third of those who expected it to be more difficult have found this to be the case, however, a larger proportion feel that there has been no change.

Around half of those who anticipated that the introduction of the charging scheme would make no difference to them still feel this way. Of this group a similar proportion say it has got easier to travel as say it has got more difficult.

Table 4.6. Inner London : Getting to central London

	Easier (249)	Same (180)	More difficult (162)	Can't say at this time (87)	Total (678)
	%	%	%	%	%
Easier (136)	9	5	3	3	20
Same (327)	18	13	12	6	48
More difficult (133)	6	5	7	2	20
Do not travel in the zone/other/DK (82)	4	3	2	3	12
Total (678)	37	27	24	13	100

Source: MORI

4.10. Travel within the zone

Around four in ten Inner London respondents say they find it easier to travel within the zone since the introduction of the charge (41%), four times as many who now find it more difficult (10%).

- The groups who are likely to travel more frequently (e.g. workers, CCZ drivers and men) are more likely to say that travelling has got easier while others tend to feel it is similar to before the scheme was introduced.

4.11. Outer London and beyond the M25: Getting to central London

As in Inner London a greater proportion of respondents from Outer London and beyond the M25 now say that the ease of travelling into the charging zone has not been affected by the scheme (60% 'same' compared to 41% in 2002).

Table 4.7. Outer London and beyond the M25 – Access to central London

Is it easier, more difficult or about the same to get to the charging zone now than it was 12 months ago before the scheme was introduced?

(Will central London feel easier to get to or more difficult?)

Outer London and beyond the M25	Expectation 2002	Actual Experience 2003	Change +/-
<i>Base: All who have travelled to or within the CCZ since the introduction of the CCS</i>	<i>(734) %</i>	<i>(734) %</i>	<i>%</i>
Easier	24	19	-5
Same	41	60	+19
More difficult	30	19	-11
No answer/Other	5	1	-4
Net Easier	-6	0	+6

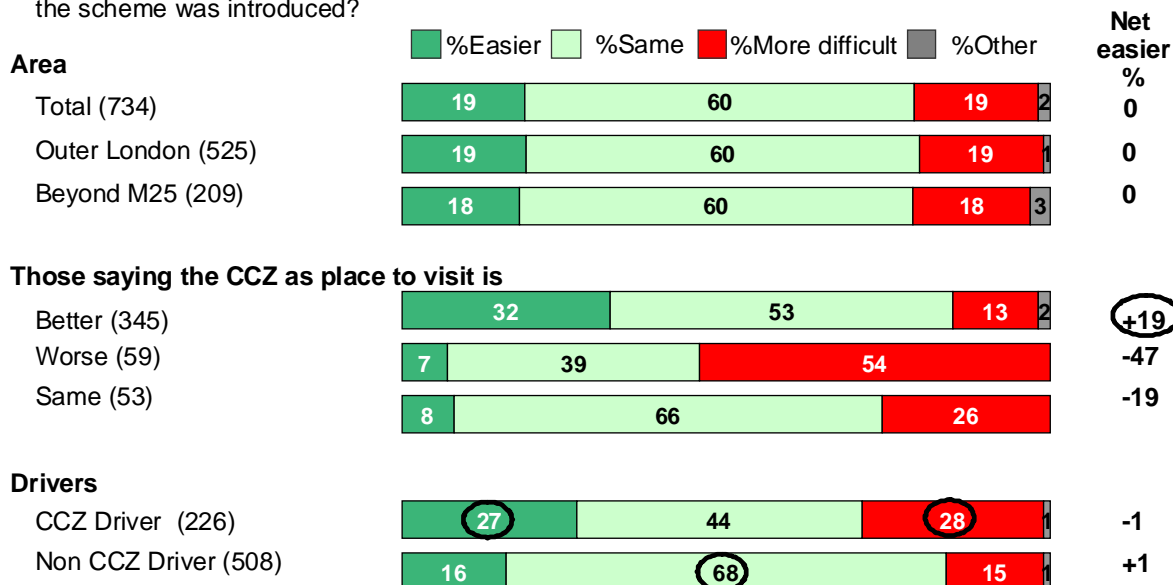
Source: MORI

There is no significant difference in views on accessibility to the charging zone between respondents in Outer London and those from beyond the M25, with the majority believing it is the same (Figure 4.9) and the remainder equally divided between it being easier or more difficult..

- Those most positive about accessibility are also most likely to say that the CCZ is now a better place to visit.
- Those who drive into the CCZ are more polarised – while just over a quarter report an 'easier' journey (27%), similar numbers report 'more difficult' trips.

Figure 4.9. Outer London and beyond the M25: Getting to Central London

Is it easier, more difficult, or about the same to get to the zone now than 12 months ago, before the scheme was introduced?



Statistically significant

Base: All who have travelled to or within the CCZ since the introduction of the CCS

4.12. Getting to central London: Expectation compared with experience

Again the majority of respondents from Outer London and beyond the M25 who have travelled into central London since the scheme was introduced say that their ease of getting to the zone is the same as in 2002. Of those who thought it would be easier, only one third have found this to be the case.

Table 4.8. Outer London and beyond the M25 : Travelling into the CCZ

	Easier (174)	Same (304)	More difficult (218)	Can't say at this time (38)	Total (734)
<i>(*Based on all who have travelled to or within the CCZ since the introduction of the CCS)</i>	%	%	%	%	%
Easier (140)	8	6	4	1	19
Same (443)	13	29	15	3	60
More difficult (140)	3	6	10	1	19
Other/DK (11)	0	1	1	0	2
Total (734)	24	41	30	5	100

Source: MORI

5. Gatherings among family and friends in the charging zone

Congestion charging zone (CCZ) neighbourhoods

The vast majority of CCZ respondents continue to visit friends or family as before with 60% travelling during charging hours to do so. The majority (70%) make these trips at least once a week and the most common main methods of transport are the car (29%) and the bus (28%). Trip frequency and method are very similar to 2002.

A significantly higher proportion of respondents who drive say they meet friends or family less often in the zone compared with those who do not drive (28% compared to 19%).

CCZ respondents believe family and friends are now finding it more difficult to visit them, particularly those respondents living in Borough and the West End. Respondents living in these two neighbourhoods are also more likely to say they meet up in the zone less often since the introduction of the charge.

Only 12% find it more difficult to visit friends and family.

Inner London neighbourhoods

Although almost all respondents (91%) from Inner London continue to visit their family and friends, slightly fewer now travel into the zone to do so (27%). Non CCZ drivers, social class DE, the over 55s and those living in South Kensington are more likely not to meet in the zone at all than the other groups. Amongst those who socialise in the charging zone, the majority have not experienced any impact from the scheme on their social life.

However, Inner London respondents who have experienced change are, on balance, now spending less time with their family and friends, finding it more difficult to visit them and meeting up in the CCZ less often.

The main subgroups in Inner London who still meet up in the charging zone, but less often nowadays, are CCZ drivers, social class AB and the under 55s.

A substantial minority (17%) of respondents are socialising within the zone less often than previously. Respondents living in Hoxton are more likely to say they meet up in the zone less often than respondents from other areas.

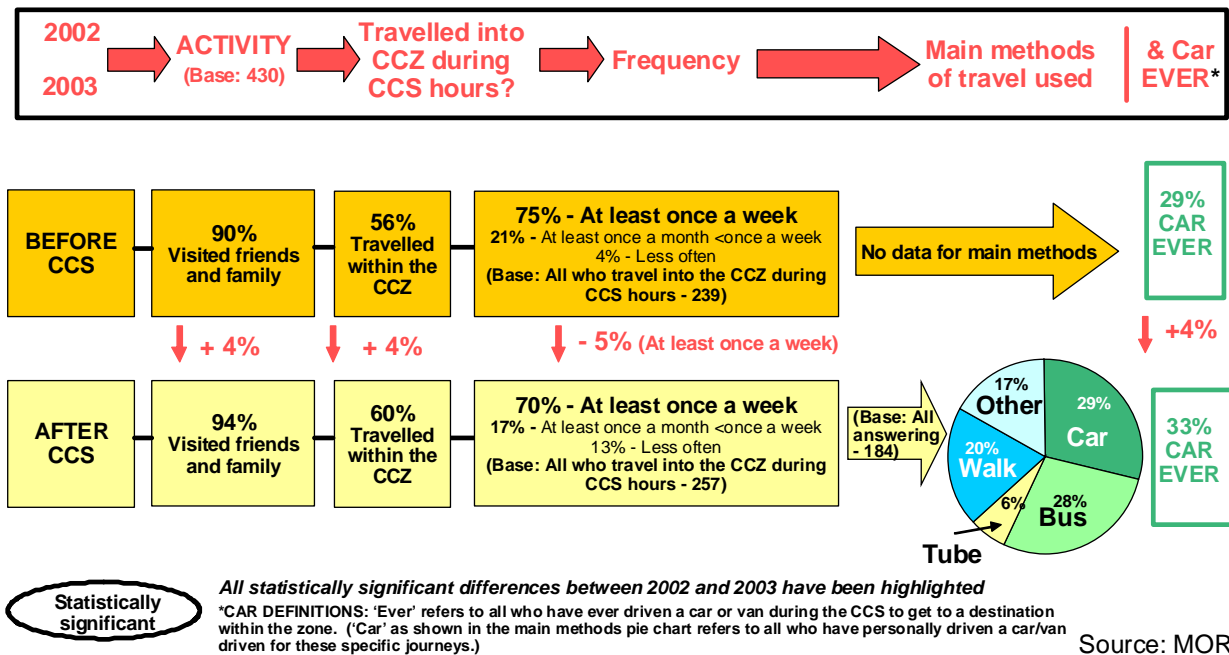
Outer London and beyond the M25

When comparing the data for respondents from Outer London and beyond the M25 who visited friends and family in Central London both before and after the introduction of the scheme, little has changed. The majority did not expect their journey to be affected and the majority confirm that this is still the case.

5.1. Congestion charging zone - travel behaviour for visiting family and friends

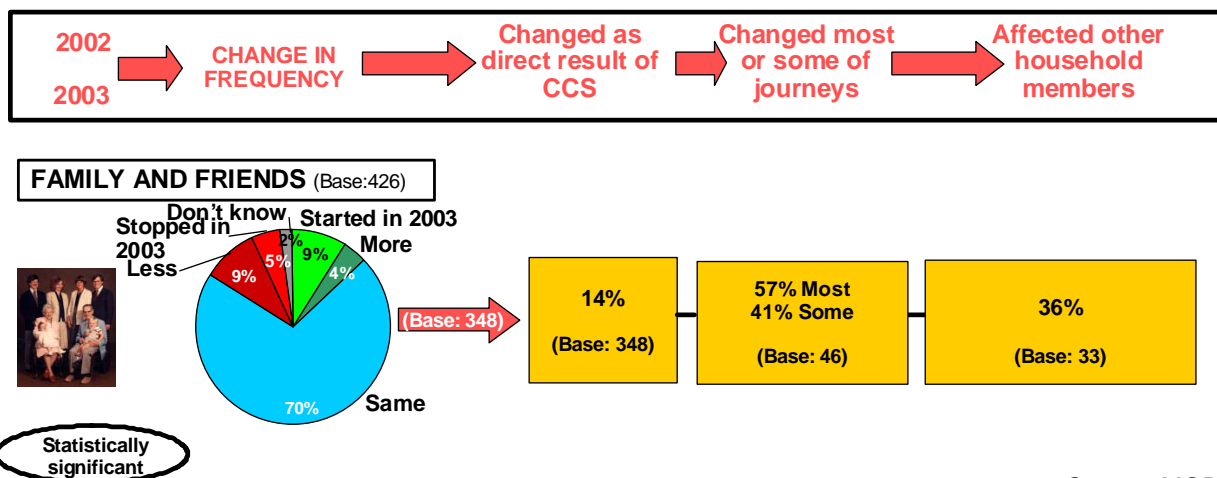
The majority of CCZ respondents continue to visit friends or family and three-fifths travel within the CCZ during charging hours to do so (Figure 5.1). The majority make these trips at least once a month and the most common main method of transport is the car (29%), followed by bus (28%). Trip frequency and method are very similar to 2002.

Figure 5.1. CCZ: Travelling to visit family and friends before and after the scheme



One in seven say they have changed travel arrangements for visiting friends and family as a direct result of the CCS, with over half of these changing most of their journeys (Figure 5.2). For a third of these (11 respondents), the changes in travel arrangements have impacted upon another household member.

Figure 5.2. CCZ: Impacts on frequency of visiting family and friends



- Those most likely to have made changes to the number of trips visiting friends and family include respondents from Holborn, CCZ drivers, and those from low to mid-income households. Similarly these groups are more likely to have made changes to their travel arrangements as a direct result of the scheme (respondents from C1C2 are more likely to have changed arrangements).
- Respondents from Holborn and CCZ drivers are also more likely to have made actual changes to their travel arrangements for visiting family and friends.

5.2. Ease of family and friends visiting

Around three-quarters of CCZ respondents have found no difference in the ease of visiting friends and family to before the introduction of the charge (Table 5.1). One in eight now find it easier to visit, in line with expectations, most likely because of reported ease in traffic and bus service improvements.

It's a lot easier because the roads are freer and you can get around much quicker.

Holborn, Over 30 n/c, C1C2, 55+, Female, Not Working, Non-driver

Table 5.1 CCZ : Visiting and visits by family and trends

Is it (will it be) easier, more difficult or about the same for your family and friends to visit you now than 12 months ago before the scheme was introduced?

Do you find visiting (will your access to) family and friends (become easier or more difficult?) easier, more difficult or about the same now than 12 months ago before the scheme was introduced?

CCZ	Visiting family and friends			Family and friends visit you		
	Expect- ation 2002	Exper- ience 2003	Change +/-	Expect- ation 2002	Exper- ience 2003	Change +/-
<i>Base: All respondents</i>	<i>(430) %</i>	<i>(430) %</i>	<i>%</i>	<i>(430) %</i>	<i>(430) %</i>	<i>%</i>
Easier	12	12	0	9	2	-7
Same	55	73	+18	40	51	+11
More difficult	26	12	-14	43	43	0
Do not visit/Can't say/ DK	7	3	-4	8	4	-4
Net Easier	-14	0	+14	-34	-42	-8

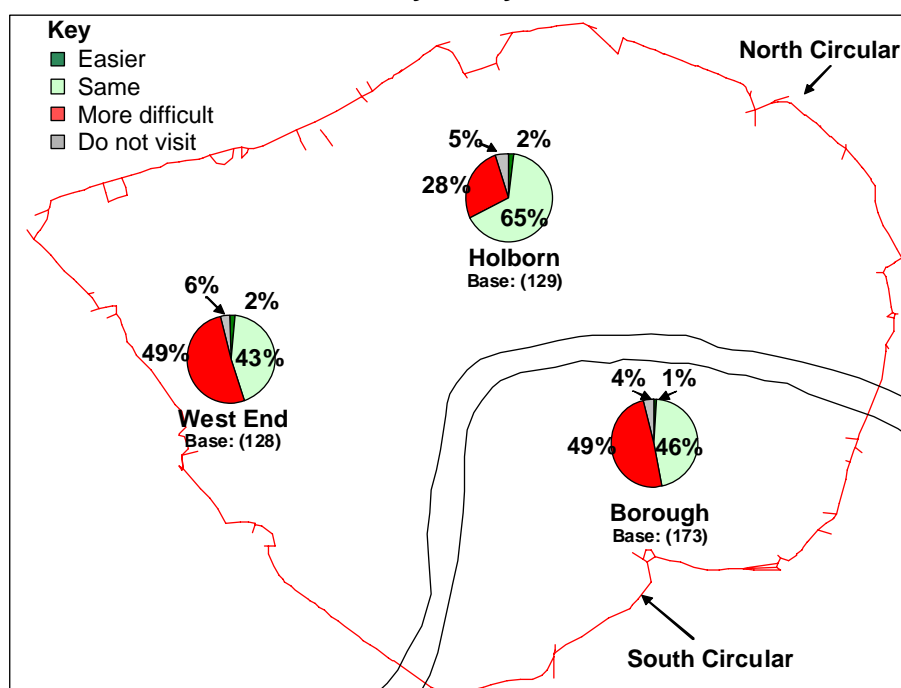
Source: MORI

Around one quarter were expecting to find it more difficult to visit family and friends, but less than half this proportion have found this to be the case. Those who do find it more difficult cite financial reasons, as well as heavier traffic when travelling out of the CCZ, as the main explanations for this.

In line with expectations, respondents perceive it to be much more difficult for family and friends to visit them, with 43% saying that this is now more difficult and only 2% saying it has become easier (Table 5.1).

- Around half of respondents living in West End and Borough are finding it more difficult for friends and family to visit them compared to 28% of respondents in Holborn (Fig 5.3).
- Visiting friends and family, however, is not seen as an issue with only 12% citing this as more difficult, consistent across all three neighbourhoods

Figure 5.3. CCZ: Ease of visits made by family and friends



- Very low income groups are finding it more difficult to visit family and friends than those on a higher income (income under £10,000 23%, over £35,000, 9%).
- A significant difference is recorded for gender, where more women say that it is a problem to meet up socially than men (50% compared to 36%).

As one respondent from the CCZ said:

People are less keen to come and see me. I don't want the scheme extended

West End, C1C2, 55+, Female, Working, Non-driver

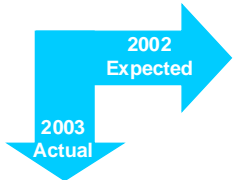
5.3. Ease of family and friends visiting: Expectation compared with experience

Half of those who expected it to be more difficult for family and friends to visit have found this to be the case, while over four in ten have found the experience to be similar to before the introduction of the charge (Table 5.2).

None of the 9% of respondents from the CCZ who thought it would be easier for family and friends to visit have found this to be the case, with half of these seeing no change and the remainder feeling it is now more difficult.

Overall the proportion expecting difficulty (43%) is the same as now experiencing it. While 40% expected visiting to stay the same just over half of these now find this is the case. Conversely amongst the 43% of respondents expecting more difficulty, half have found this to be so but almost all the remainder feel there is no change.

Table 5.2. CCZ : Family and friends visiting

	Easier (38)	Same (170)	More difficult (183)	Can't say at this time (39)	Total (430)
	%	%	%	%	%
Easier (7)	0	0	1	0	2
Same (219)	5	23	18	5	51
More difficult (186)	3	14	22	4	43
Do not visit/other/DK (18)	0	2	2	0	4
Total (430)	9	40	43	9	100

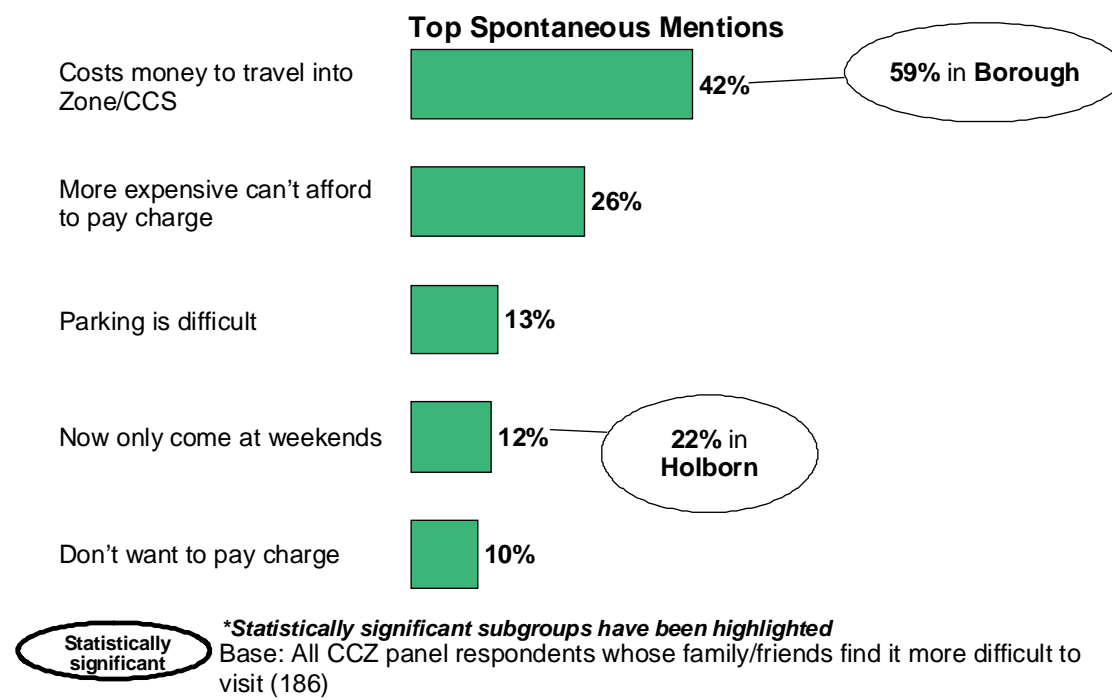
Source: MORI

5.4. Reasons for finding visits easier or more difficult

The cost of travelling into the zone and parking are cited by CCZ respondents as the main reasons for friends and family finding it more difficult to visit during charging hours.

Figure 5.4. CCZ: Difficulties for family and friends to visit

Why do your family and friends now find it more difficult to visit you?



Some illustrative examples of comments made by respondents of difficulties experienced by visiting are shown below:

It's difficult for me as I can't set off until after 6.30 at night. I'm under the impression that although we live in the zone, we have to pay to get out of the zone – there is confusion locally

West End, 30 and under no children, C1C2, under 25, Female, Working, Driver

Because people find it difficult to meet due to congestion charge, we normally drive out to meet them instead

Borough, Retired, AB, 55+, Female, Working, Driver

Due to congestion charge people are not interested in visiting us during congestion charge hours – even minicabs are refusing to come into the zone because of this

Borough, AB, 35-54, Male, Working, Driver

Because of the cost overall, parking is £1 per hour or more so it all adds up. Also yellow lines all down the road now with traffic wardens up and down road constantly

Borough, Primary/pre-school children, DE, 35-54, Female, Not working, Driver

More to pay £5 to visit me - is quite a lot so they don't come at all, so miss out a lot with family visits in general

Borough, Primary/pre-school children, DE, 35-54, Male, Not working, Driver

Parking is so expensive and with the congestion charge it can cost £13 for a person to visit me for a cup of tea

West End, Retired, AB, 55+, Female, Not working, Driver

Because they don't want to pay the charges. Overnight guests can't come to my place anymore. My child minder can't come in any more because I can't continue to pay her charges

Borough, Primary/pre-school children, AB, 35-54, Female, Working, Driver

5.5. Meetings and social gatherings with family and friends

Around three-quarters of CCZ respondents have made no change to the frequency with which they meet up with family and friends (Table 5.3). The very few who meet up in the charging zone more often since the introduction of the charge say this is because bus services have improved and that it is easier to get around the zone because of less traffic.

Around a fifth say that they meet up in the CCZ less often now, with the cost of the charge again given as the main reason, with a small number of respondents specifically stating that their family and friends do not want to pay the charge. Parking problems are a reason for fewer social gatherings.

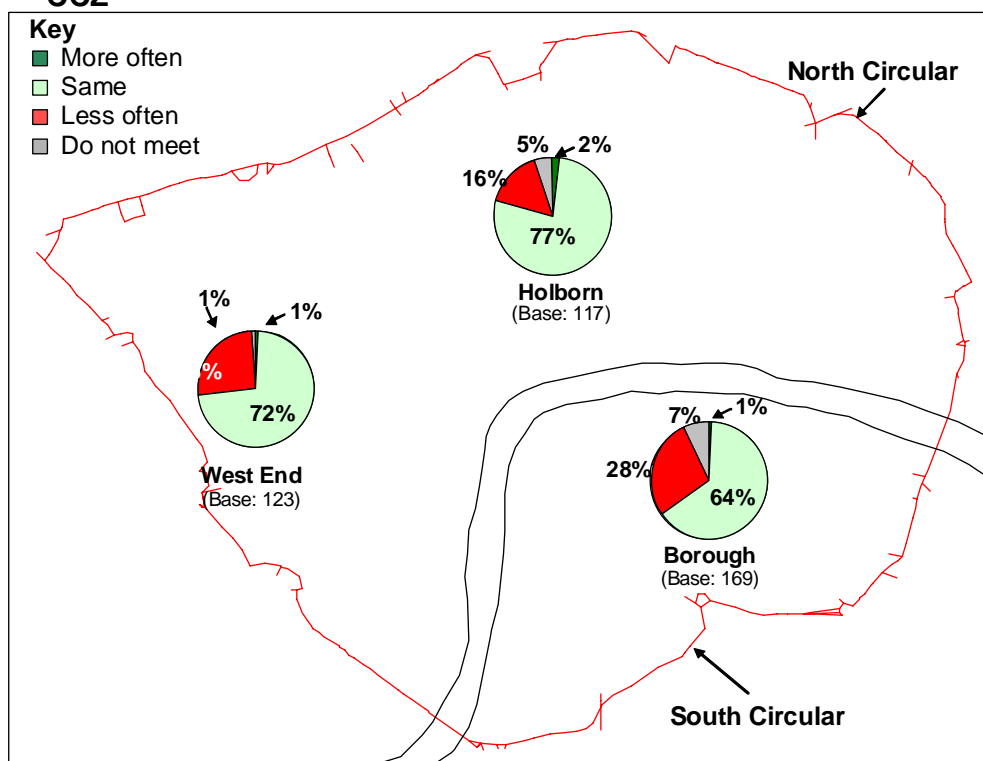
Table 5.3. CCZ : Social gatherings in the zone

Overall, do (will) meetings or social gatherings with family and friends (in central London) in the charging zone happen more often, less often or about the same now compared to 12 months ago?

CCZ	Meetings in CCZ		
	Expectation 2002	Experience 2003	Change +/-
<i>Base: All respondents answering</i>	(409) %	(409) %	%
More often	2	1	-1
Same	65	70	+5
Less often	24	24	0
Do not meet/ Can't say/other /DK	9	5	-4
Net more often	-22	-23	-1

Source: MORI

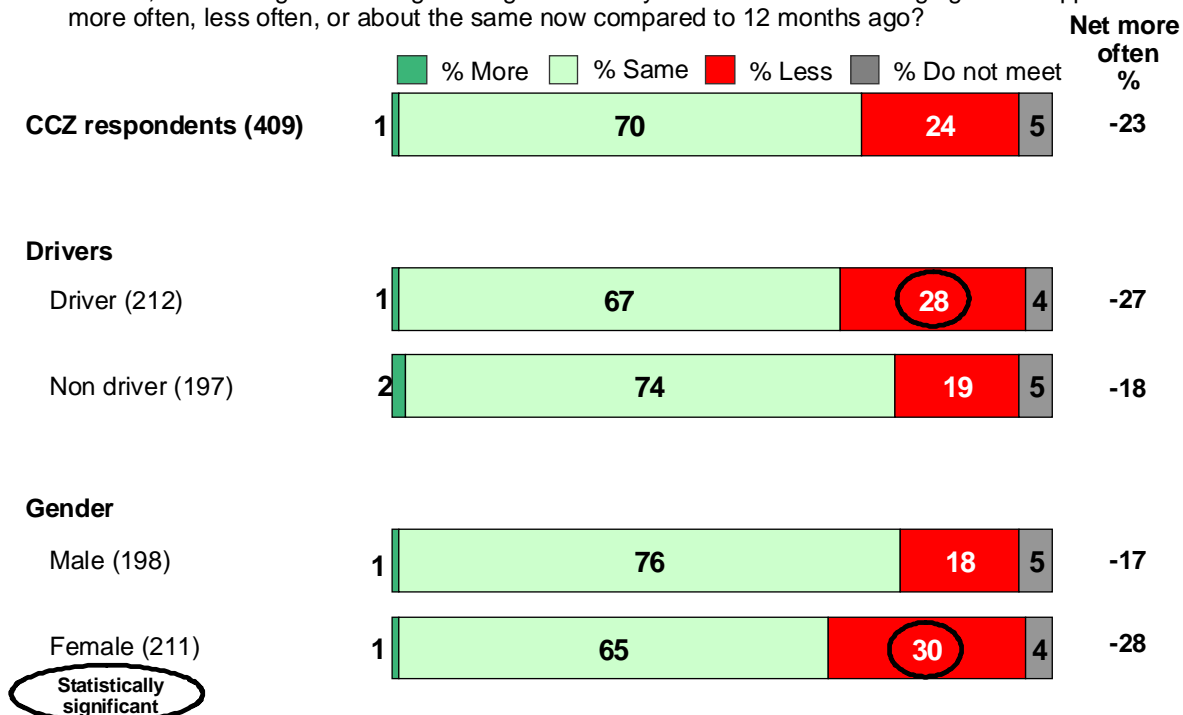
Figure 5.5. CCZ: Change in frequency of meetings and social gatherings in the CCZ



- Between 16% and 28% of respondents from all CCZ neighbourhoods say that they now have fewer social gatherings with family and friends than before the introduction of the charge, with those living in Borough and the West End more likely to say this is the case. The majority in all areas say there has been no change (see Figure 5.5).

Figure 5.6. CCZ: Change in frequency of meetings and social gatherings in the CCZ

Overall, do meetings or social gatherings with family and friends in the charging zone happen more often, less often, or about the same now compared to 12 months ago?

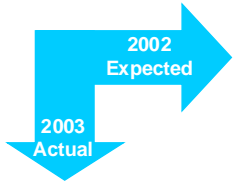


- Drivers, women and respondents from the lower income households are the most likely to say they meet up less often now confirming previous findings (Figure 5.6).

5.6. Meetings and social gatherings with family and friends: Expectation compared with experience

A greater proportion of respondents who anticipated meeting up within the zone more often actually meet up less often than before, while those who expected there would be no change in their behaviour have mostly found this to be the case. A reasonable proportion have actually found they meet less often than before.

Table 5.4. CCZ : Meetings or social gatherings in the CCZ

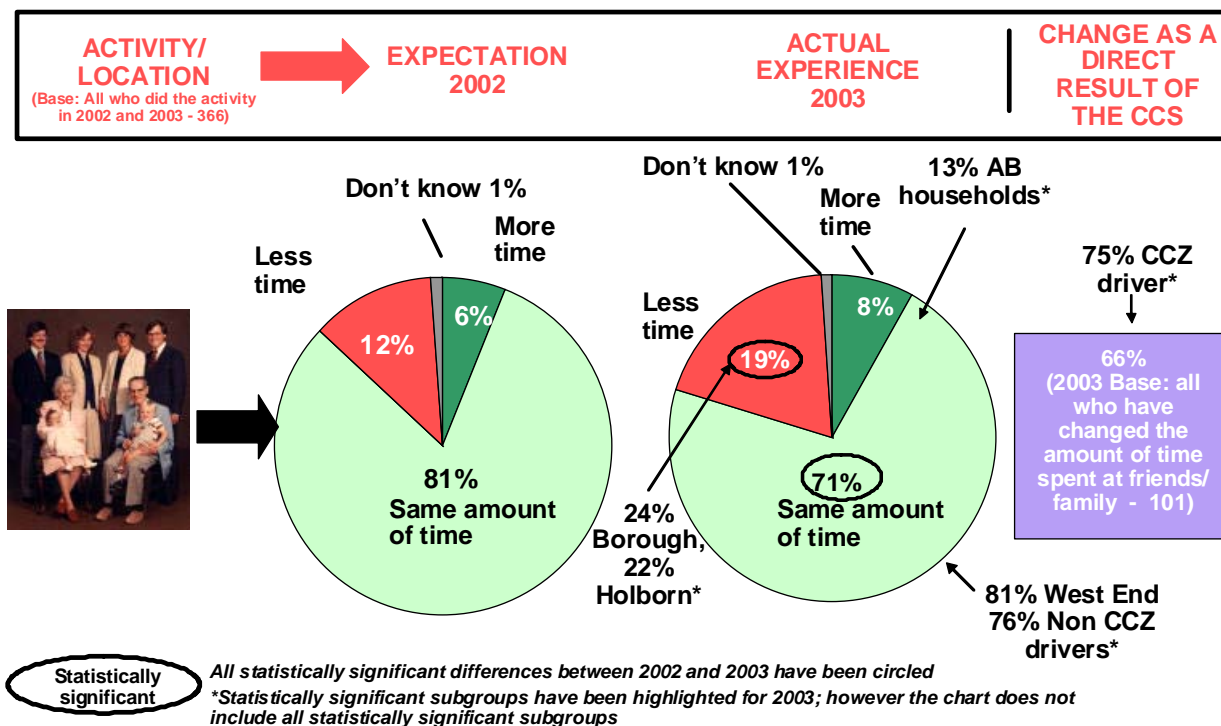
	More often (9)	Same (266)	Less often (98)	Can't say at this time (36)	Total (409)
	%	%	%	%	%
More often (5)	0	1	0	0	1
Same (288)	1	50	12	7	70
Less often (98)	1	12	10	2	24
Do not meet in CCZ/Other/DK (17)	0	3	2	0	4
Total (409)	2	65	24	9	100

Source: MORI

5.7. Time spent with family and friends

A significantly higher proportion of those in the CCZ now say they spend less time with their friends and family than expected to do so. Only one in eight expected to do so, whereas one in five say they actually have; those in Borough and Holborn are particularly affected (see Figure 5.7). Again this echoes earlier findings where a significant proportion of CCZ respondents say that fewer friends and family now visit them since the introduction of the scheme. Two-thirds of those who experienced any change attribute this to the scheme, a significantly higher proportion of those who are drivers say that this is the case.

Figure 5.7. CCZ: Change in the amount of time spent with family and friends



5.8. Inner London - travel behaviour for visiting family and friends

The majority of Inner London respondents continue to visit family and friends since the introduction of the scheme and a quarter travel into the CCZ during charging hours to do so.

Three-quarters of those who make these trips do so at least once a month (compared to 82% before charging), with the most common main method of transport being the car (35%). Car usage for any of these trips remains unaffected since the introduction of the scheme (40% reported in both the 'before' and 'after' survey).

Nearly a fifth of those visiting family and friends have made changes to their travel arrangements as a direct result of the introduction of the scheme (with 39% making changes to most of their trips). The impact on other household members is substantial, with nearly half being affected (46%).

Figure 5.8 Inner London: Travelling to visit family and friends before and after the scheme

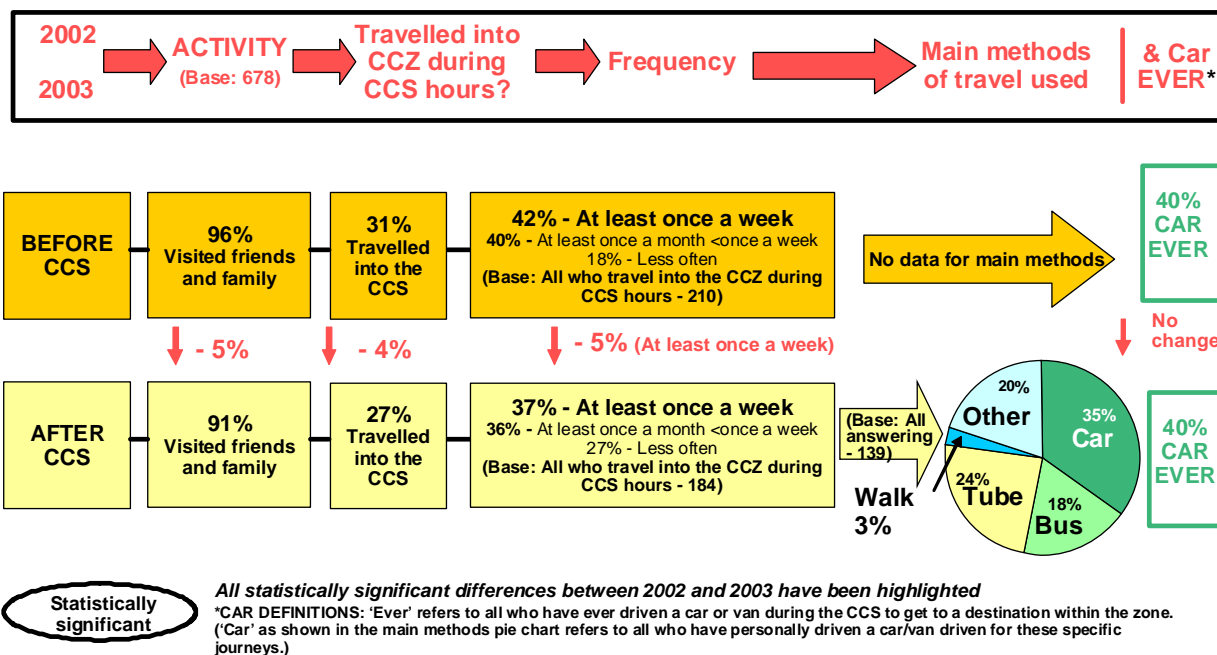
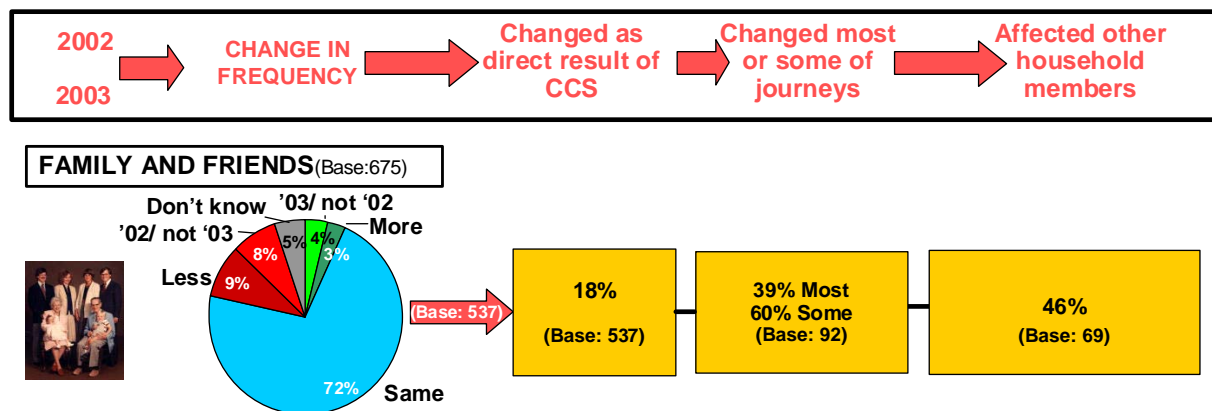


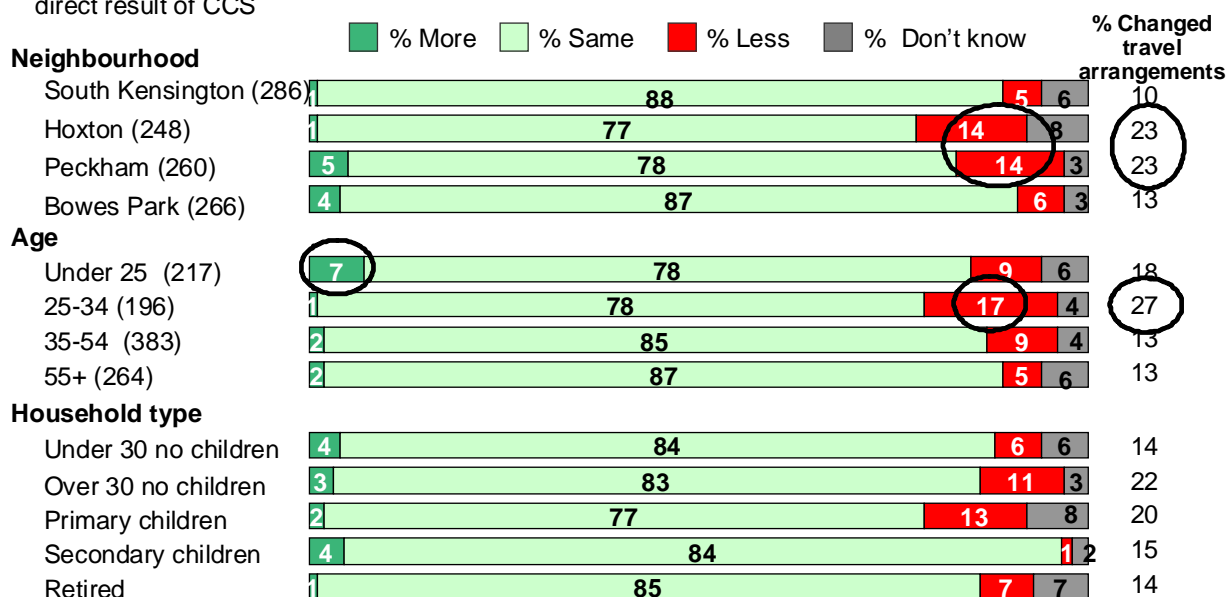
Figure 5.9: Inner London: Impacts on frequency of visiting friends and family



- Slightly fewer journeys are now being made to visit friends and family, particularly amongst respondents from Hoxton and Peckham and respondents aged 25-34. These groups are also the most likely to have changed their travel arrangements whilst making these journeys. Over one quarter of 25-34 year olds report making changes to their travel arrangements (see Figure 5.10).

Figure 5.10. Inner London: Change in the number of journeys visiting friends and family

... whether make more, less or about the same number of journeys visiting friends/family as a direct result of CCS



Statistically significant

Base: All Inner London respondents who visit family/friends

5.9. Ease of family and friends visiting

The change in frequency of visiting family and friends appears to reflect the change in difficulty Inner London respondents have experienced since the introduction of the charge. This applies to drivers to the zone more than non-drivers amongst Inner London respondents. While around three-quarters say there has been no change, more of those who have experienced a change say it is now more difficult. Despite this, the proportions finding it more difficult are lower than anticipated (see Table 5.5).

Among Inner London respondents a similar picture emerges for both visiting family and friends and being visited by them.

Table 5.5. Inner London : Visiting and visits by family and friends

Do you find visiting (*will your access to*) family and friends (*become easier or more difficult?*) easier, more difficult or about the same now than 12 months ago before the scheme was introduced?

Is it (*will it be*) easier, more difficult or about the same for your family and friends to visit you now than 12 months ago before the scheme was introduced?

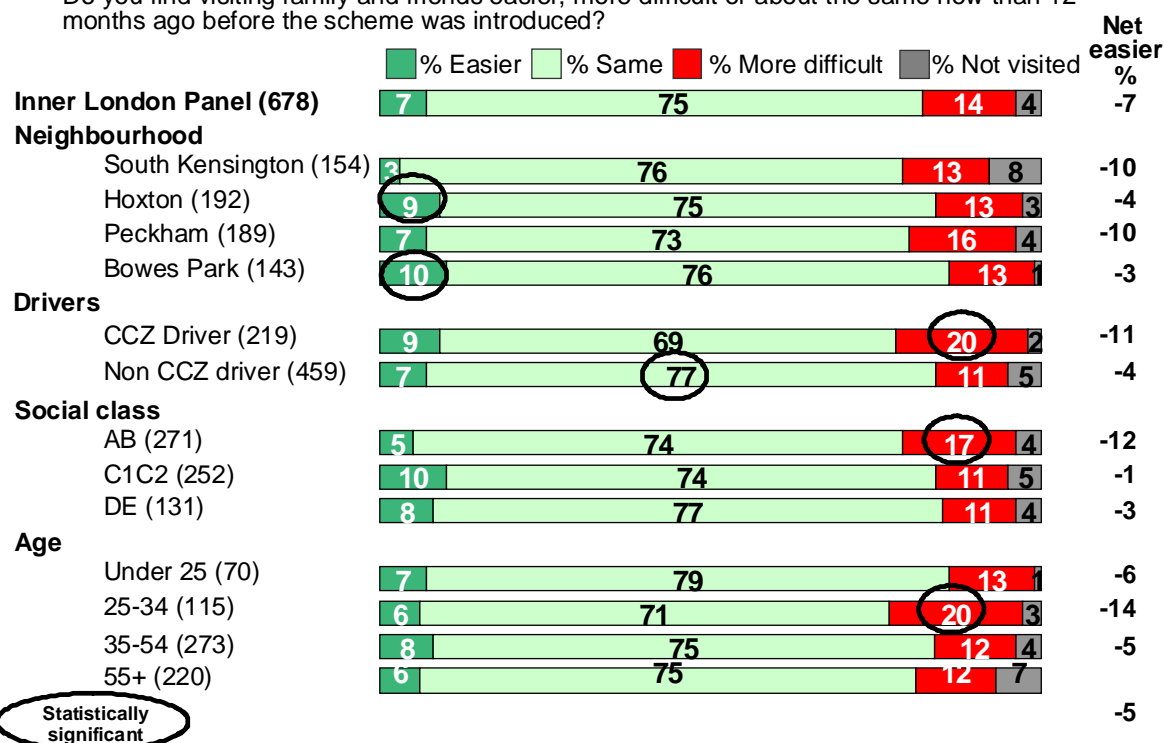
Inner London	Visiting family and friends			Family and friends visit you		
	Expect- ation 2002	Exper- ience 2003	Change +/-	Expect- ation 2002	Exper- ience 2003	Change +/-
Base: All respondents	(678) %	(678) %	%	(678) %	(678) %	%
Easier	10	7	-3	8	4	-4
Same	57	75	+18	52	71	+19
More difficult	21	14	-7	24	18	-6
Do not visit/Can't say/ DK	12	4	-8	16	7	-9
Net Easier	-11	-7	+4	-16	-14	+2

Source: MORI

- While the majority (75%) find the ease of visiting friends and family is the same as before the change, a greater proportion of respondents from all neighbourhoods in Inner London believe that both visiting and being visited is now more difficult rather than easier than before the introduction of the charge (Figure 5.11).
- CCZ drivers, social class group AB and respondents aged 25-34 are more likely to say it is more difficult now to visit family and friends than before the introduction of the charge (Figure 5.11).

Figure 5.11. Inner London: Ease of visiting family and friends

Do you find visiting family and friends easier, more difficult or about the same now than 12 months ago before the scheme was introduced?



5.10. Ease of visiting family and friends: Expectation compared with experience

Of those who thought it would become easier to visit family and friends, a small proportion say that this is the reality, whereas most have noticed no change. Amongst those who thought it would be more difficult most have noticed no difference. Few have found this to be the case and a small percentage now find it has actually become easier. The overwhelming majority of those who anticipated no change have experienced this.

Table 5.6. Inner London: Visiting family and friends

	Easier (69)	Same (387)	More difficult (143)	Can't say at this time (79)	Total (678)
2002 Expected					
2003 Actual					
	%	%	%	%	%
Easier (49)	2	3	1	1	7
Same (507)	7	45	14	9	75
More difficult (94)	1	7	5	1	14
Do not visit/other/DK (28)	0	2	1	1	4
Total (678)	10	57	21	12	100

Source: MORI

5.11. Reasons for finding visits easier or more difficult

For the few respondents now finding it easier to visit family and friends, the main reasons given are less traffic and a better bus service. These same reasons are cited by those who consider it easier for family and friends to visit them.

Difficulty with parking is by far the main reason why respondents say it is difficult for family and friends to visit them as illustrated below. This is particularly true of respondents in South Kensington where over eight in ten cite parking as the problem.

Because they can't find anywhere to park, they wouldn't dream of coming during week, only come on Sunday when public transport is bad. For old people and relatives it's bad. Use car when would use public transport if it was regular or reliable.

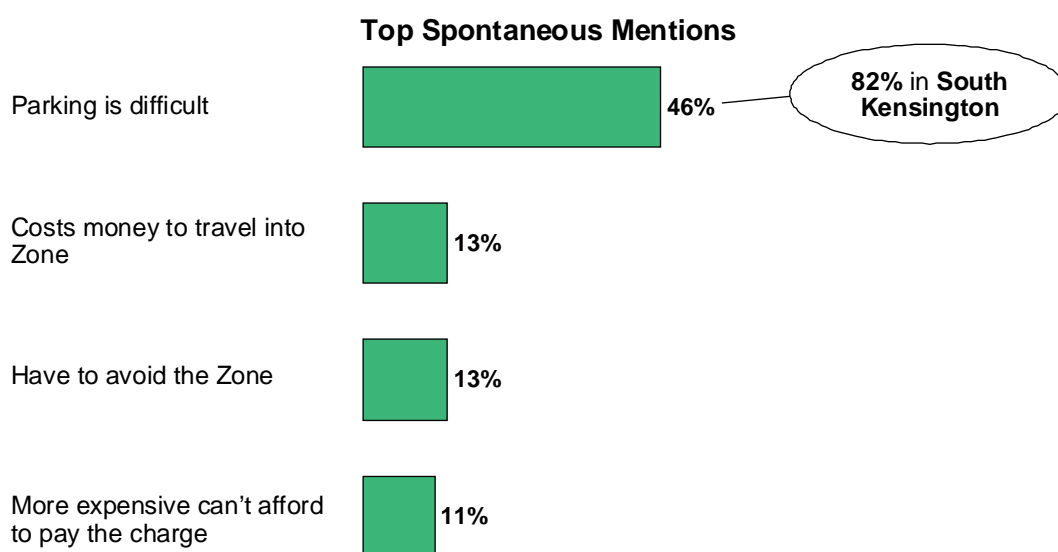
Peckham, AB, 35-54, Female, Not working, CCZ Driver

The cost of driving through the zone, and the inconvenience of having to avoid it, are the next most common reasons for not visiting family and friends.

The majority of respondents find the ease of visiting family and friends unchanged since before the introduction of congestion charging.

Figure 5.12. Inner London: Difficulties for family and friends to visit

Why do your family and friends now find it more difficult to visit you?



Statistically significant

**Statistically significant subgroups have been highlighted*
 Base: All Inner London panel respondents whose family/friends find it more difficult to visit (122)

5.12. Meetings and social gatherings with family and friends

There has been little change in the frequency of meeting friends and family in the Inner London neighbourhoods overall, with the majority, 85%, meeting up as much as ever, and the same proportion saying they meet more often as meet less often (6%). The few respondents who say they meet up more often in their local area do so in order to avoid the charge, while those who meet less often in the local area tend to blame parking problems.

However, a substantial proportion of Inner London respondents now meet up less often or not at all within the zone (17% and 26% respectively). In line with expectations only a very small percentage meet up more often, this being due either to changes in circumstances such as family and friends having moved (3 people) as benefits of congestion charging (less traffic, 2 people; better public transport, 2 people). Those meeting less often in the zone are doing so as a direct result of the charge, with cost being the main consideration.

Table 5.7. Inner London : Social gatherings

Overall, do (will) meetings or social gatherings with family and friends (in central London) in the charging zone happen more often, less often or about the same now compared to 12 months ago?

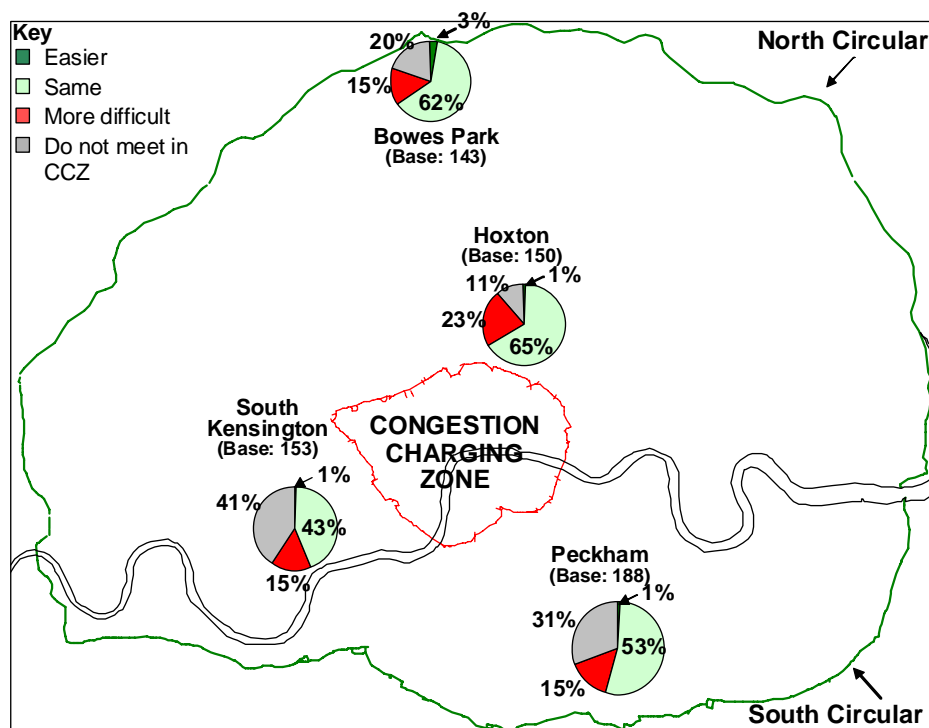
Overall, do (will) meetings or social gatherings with family and friends in the local area happen more often, less often or about the same now compared to 12 months ago?

Inner London	Meetings in CCZ			Meetings in local area		
	Expect- ation 2002	Exper- ience 2003	Change +/-	Expect- ation 2002	Exper- ience 2003	Change +/-
<i>Base: respondents answering</i>	<i>All</i>	(634) %	(634) %	(635) %	(635) %	%
More often	4	2	-2	6	6	0
Same	66	56	-10	78	85	+7
Less often	15	17	+2	4	6	+2
Do not meet/ Can't say/other /DK	15	26	+11	12	3	-8
Net more often	-11	-15	-4	+2	0	-2

Source: MORI

- Of all Inner London neighbourhoods, Hoxton has the greatest proportion of respondents who meet up with family and friends in the zone less often now (23%). South Kensington and Peckham respondents are more likely than those from the other neighbourhoods to not meet up at all (41% and 31% respectively).

Figure 5.13. Inner London: Change in frequency of meetings and social gatherings in the CCZ



- The main subgroups in Inner London who still meet up in the charging zone, but less often nowadays, are CCZ drivers, social class group AB and those aged 35-54 years. Non CCZ drivers, social class group DEs and the over 55s are more likely not to meet in the zone at all now (see Figure 5.14).

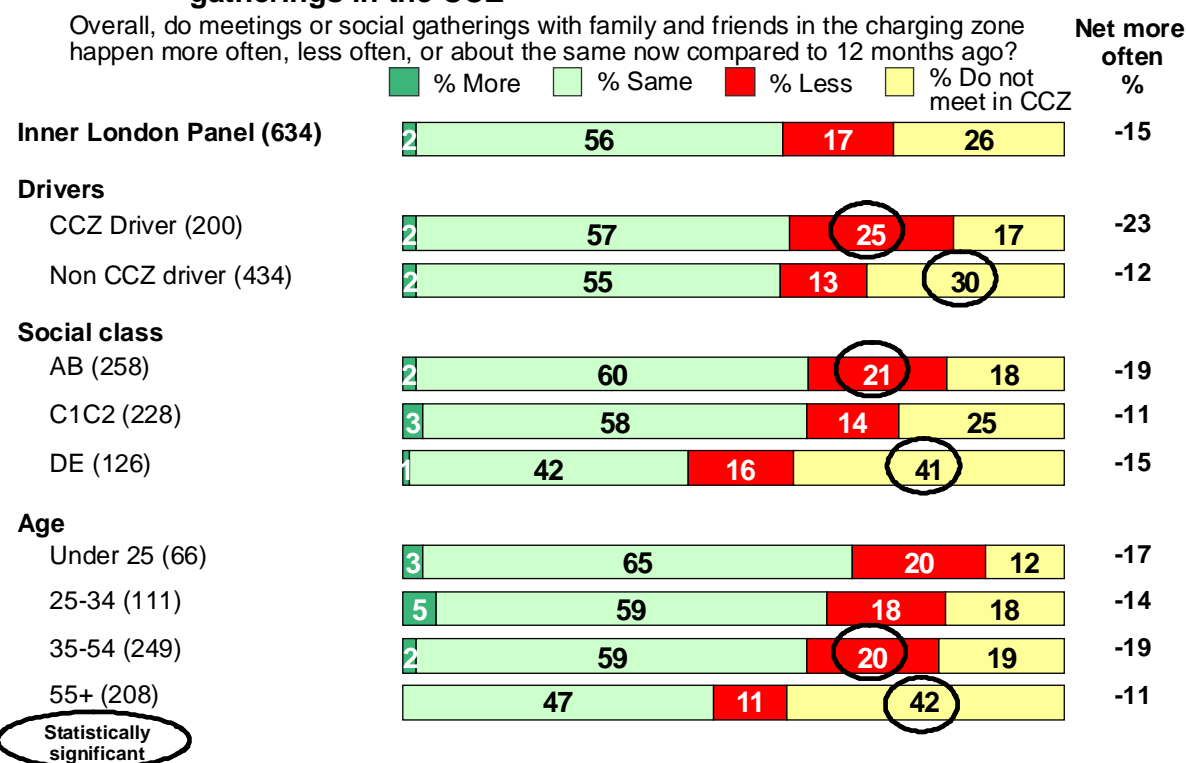
An example of comments made by Inner London respondents relating to the frequency of visiting the zone are shown below:

*Because of difficulties in getting there, takes too long and costs too much.
Friends are now travelling to Bluewater instead of Oxford Street*

Hoxton, AB, 35-54, Female, Working, CCZ Driver

Figure 5.14. Inner London: Change in frequency of meetings and social gatherings in the CCZ

Overall, do meetings or social gatherings with family and friends in the charging zone happen more often, less often, or about the same now compared to 12 months ago?

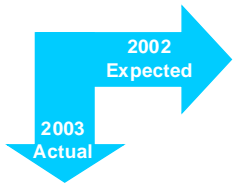


5.13. Meetings and social gatherings with family and friends: Expectation compared with experience

Before the introduction of congestion charging the majority of respondents (66%) felt that the scheme would not impact on the frequency with which they would socialise in the zone. While this has been the case for most in this group, a reasonable proportion now say they meet up less often, ten times more than those who say they now meet up more often.

Those who expected to meet up more often have found their meeting patterns have not changed, while those who expected to meet less often are more likely to say there has been no change than have actually noticed a reduction in meeting.

Table 5.8. Inner London: Meetings and social gatherings in the CCZ

	More often (23)	Same (421)	Less often (94)	Can't say at this time (96)	Total (634)
	%	%	%	%	%
More often (11)	0	1	0	0	2
Same (352)	2	38	8	8	55
Less often (107)	0	10	4	2	17
Do not meet in CCZ/Other/DK (164)	1	17	3	5	26
Total (634)	4	66	15	15	100

Source: MORI

5.14. Time spent with family and friends

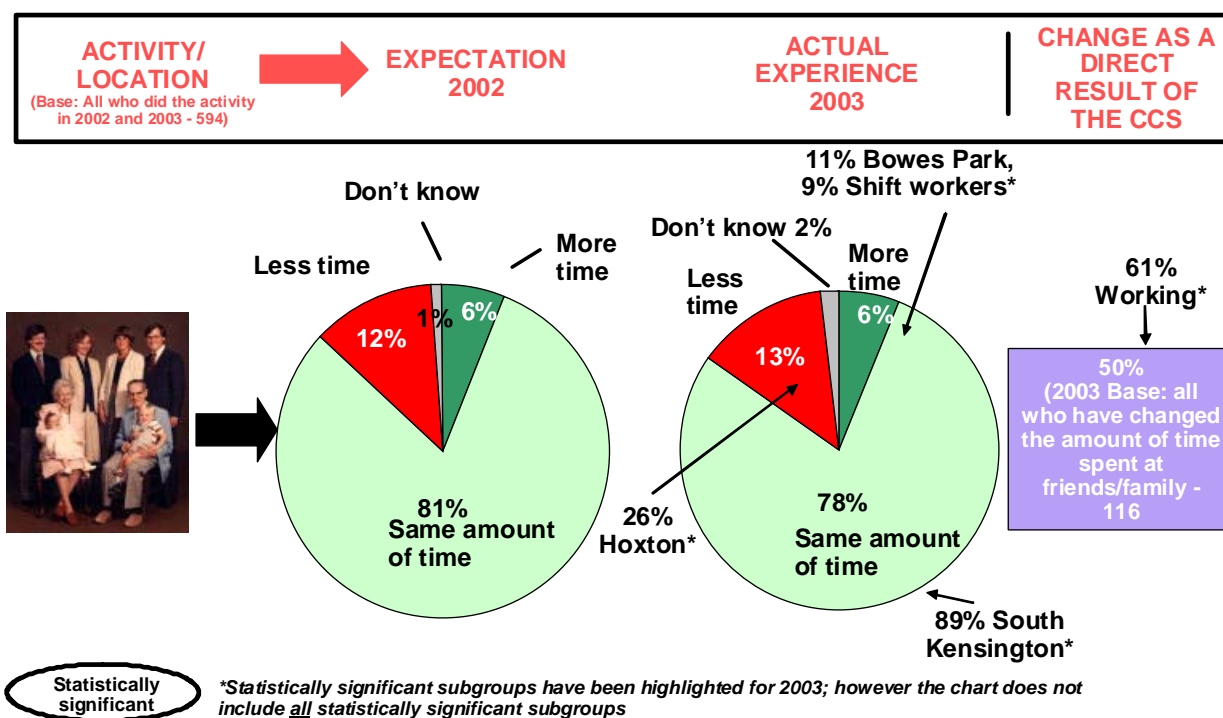
The majority of respondents expected to spend the same amount of time with family and friends once the scheme was introduced, and expectations and experience are very similar (Figure 5.15).

The overall increase in difficulty of visiting and being visited, along with fewer social meetings now happening within the CCZ has contributed to twice as many Inner London respondents spending less rather than more time with their family and friends, a change in line with expectations.

Half of those who have experienced change attribute this to the scheme.

- Supporting findings earlier in this chapter, of those who say they now spend less time with family and friends a higher proportion are from Hoxton.
- A significantly higher proportion of respondents who are working attribute the change in the time spent with family and friends to the scheme.

Figure 5.15. Inner London: Changes in the amount of time spent with family and friends



5.15. Outer London and beyond the M25: Ease of family and friends visiting

When comparing the data for those living in outer London or beyond who visited friends and family in central London both before and after the introduction of the scheme, little has changed. The majority did not expect their journey to be affected and the majority confirm this is still the case (Table 5.9). A similar proportion of respondents in Outer London and beyond the M25 report 'easier' and 'more difficult' trips when visiting friends and family, in line with expectations.

Table 5.9. Outer London and beyond the M25 : Ease of visiting friends and family

	Easier (38)	Same (337)	More difficult (82)	Can't say at this time (9)	Total (466)
2002 Expected	%	%	%	%	%
2003 Actual	%	%	%	%	%
Easier (57)	3	7	1	0	12
Same (343)	4	58	10	1	73
More difficult (66)	1	7	7	0	14
Total (466)	8	72	18	2	100

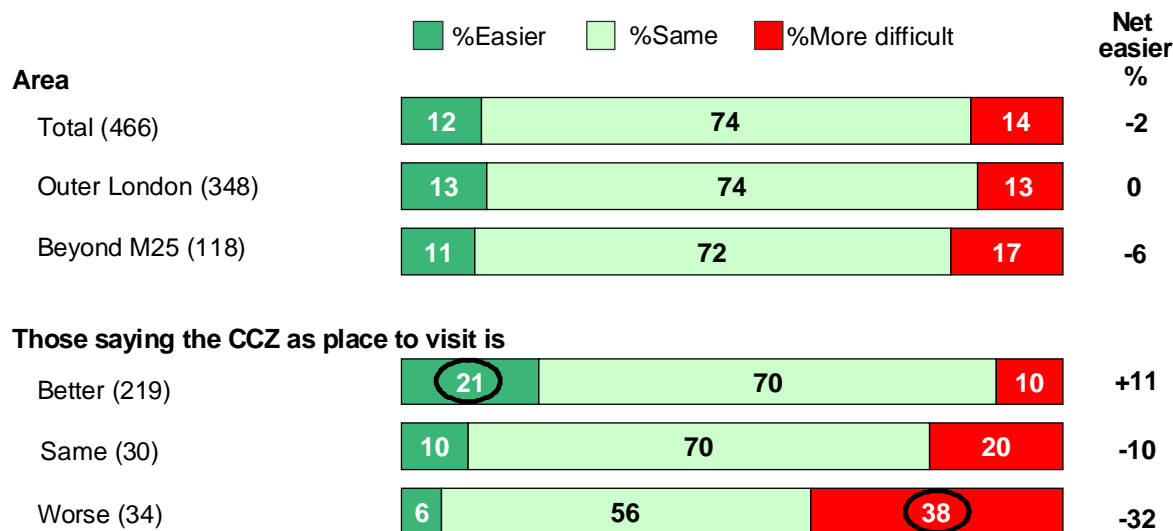
*(Base: All who visited friends and family in both 2002 and 2003)

Source: MORI

- Those who say the CCZ is now a worse place to visit³ are also significantly more likely to say it is now more difficult to visit friends and family since the introduction of the scheme (Figure 5.16).

Figure 5.16. Changes in the amount of time spent with family and friends

Do you find visiting friends and family that live in Central London easier, more difficult or about the same now than 12 months ago before the scheme was introduced?



Statistically significant

Base: All Outer London and beyond the M25 respondents who visited friends and family in both 2002 and 2003

5.16. Meetings and social gatherings with family and friends

Similar to respondents in Inner London, respondents in Outer London and beyond the M25 report a fall in the frequency of meetings or social gatherings with friends and family (Table 5.10). While three-quarters of Outer London expected to continue socialise in the charging zone to the same extent after the scheme just under two-thirds have found this actually happened.

³ All saying 'worse' when asked 'Taking everything into account, would you say that the charging zone as a place to visit has got better, worse or remained about the same since the scheme was introduced in February this year?'

Table 5.10. Outer London and beyond M25 : Social gatherings in the zone

Will meetings or social gatherings with your friends and family in central London happen more or less often?

Overall, do meetings or social gatherings with your family and friends in the charging zone happen more often, less often or about the same now compared to 12 months ago?

Outer London and beyond the M25	Expectation 2002	Experience 2003	Change +/-
<i>Base: All respondents answering</i>	<i>(777) %</i>	<i>(777) %</i>	<i>%</i>
More often	10	3	-7
Same	76	62	-14
Less often	13	18	+5
Do not meet	n/a	1	+1
Other /DK	2	14 <i>(Outer London=11% Beyond M25=23%*)</i>	+12
Net more often	-3	-15	-12

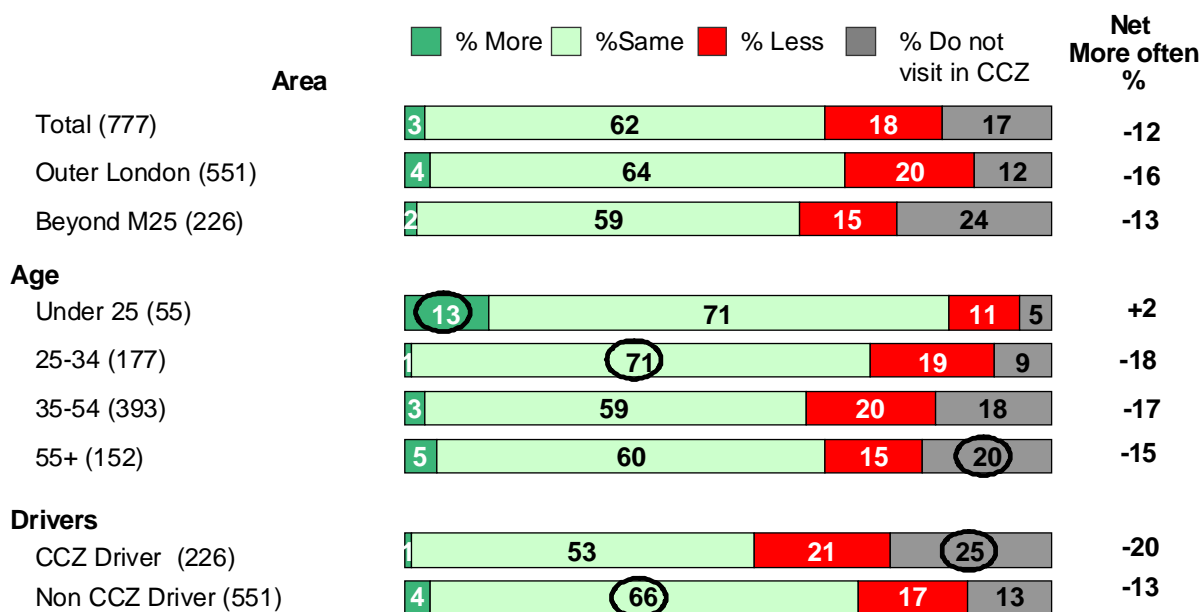
**Significant differences between Outer London and beyond the M25 are highlighted*

Source: MORI

- The combined results for those in Outer London and beyond the M25 are very similar to Inner London. Those in Outer London, however, report making slightly fewer trips since the introduction of the scheme, in comparison to those from beyond the M25 (20% compared to 15%) (Figure 5.17).
- Those aged under 25 are significantly more likely to report more trips into the zone to visit family and friends.
- Non CCZ drivers are significantly more likely than CCZ drivers to say the number of social trips they make into the CCS has remained unchanged since the introduction of the scheme.

Figure 5.17. Outer London and beyond the M25: change in frequency of meetings and social gatherings in the CCZ

Overall, do meetings or social gatherings with your family and friends in the charging zone happen more often, less often or about the same now compared to 12 months ago?



Statistically significant

Base: All Outer London and Beyond the M25 respondents

5.17. Meetings and social gatherings with family and friends: Expectation compared to experience

When expectations do not match experience, those from Outer London and beyond the M25 are most likely to say that the frequency of social gatherings remains unchanged in comparison to 2002 (Table 5.11), although amongst those who predicted they would meet up less often a similar proportion have found this to be the case.

Table 5.11. Outer London and beyond the M25: Meeting or social gatherings in the CCZ

	More often (74)	Same (588)	Less often (102)	Can't say at this time (13)	Total (777)
	%	%	%	%	%
More often (26)	1	2	0	0	3
Same (485)	6	47	6	1	62
Less often (141)	1	12	5	0	18
Do not meet in CCZ/Other/DK (125)	1	13	2	1	17
Total (777)	10	75	13	2	100

Source: MORI

6. Impacts of congestion charging on different activities and methods of travel

Congestion charging zone (CCZ) neighbourhoods

For most of the specified activities (commuting, business, education, shopping, leisure, health services and facilities) around a quarter of CCZ respondents report making changes to the number of journeys (whether more or less) as a direct result of the charging scheme. For commuting, visiting family and friends and leisure trips the number making more journeys is balanced with those making fewer journeys.

Overall little has changed in terms of car use by CCZ respondents.

Inner London neighbourhoods

Compared to before the scheme was introduced, the decreased use of the car by Inner London respondents is particularly noticeable for commuting and business trips. While the scheme has had little impact on food shopping behaviour for Inner London respondents, it has had a marked affect on non-food shopping and leisure trips with around 10% making changes as a result of the scheme, though this is likely to be on some rather than all these trips. Amongst those making changes, a third report some impact on other household members.

Whilst both Inner London and CCZ respondents are now less likely to use a car to make trips into the zone during charging hours, those in Inner London have been more dramatically affected. For example the proportion who ever use their car to commute to and from work has fallen by 10% points since 2002 across the four neighbourhoods.

Of note is the fall in car use for commuting trips by Inner London respondents.

Outer London and beyond the M25

Respondents in Outer London and beyond the M25 are less likely to drive into the zone for any of the specific trips asked about (from commuting to visiting friends and family). Of the 70% who drove into the zone in 2002, half say their travel patterns (regarding where they drive or the times they drive) have been affected by the scheme.

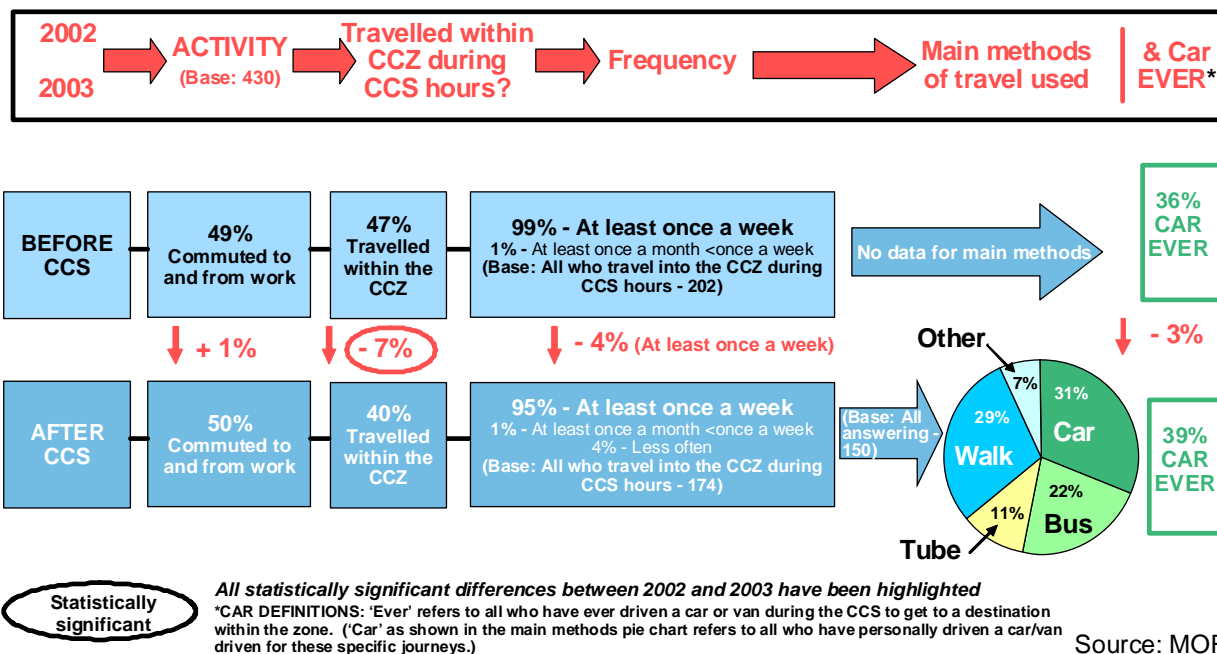
Around two-thirds of respondents in Outer London and beyond the M25 commute to work into the CCZ during CCS hours. The most common method of transport for commuting is by train, followed by the tube and the car. Those who travel from beyond the M25 are significantly more likely to travel by train (48% compared to 33% from Outer London). Outer London respondents are more likely to travel by tube, related to the provision of this mode across the area (32% compared to 16% beyond the M25).

Just over a third of respondents from Outer London and beyond the M25 currently make business trips into the zone, a fifth visit friends and family in the zone, while approaching two-fifths make any leisure trips into the CCZ.

6.1. Congestion charging zone respondents - commuting

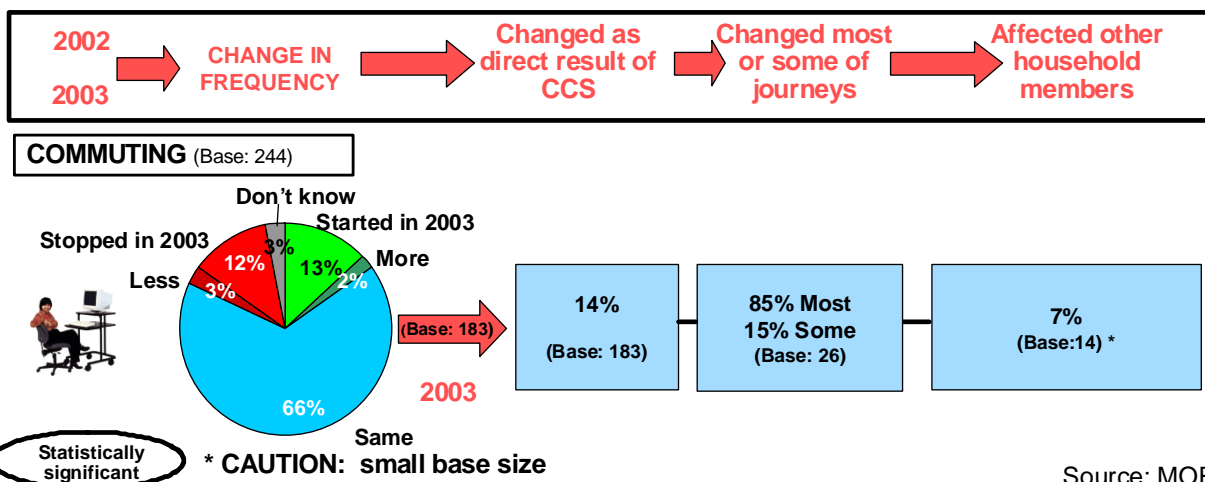
Half of CCZ respondents commute to work, with 40% doing so inside the zone during charging hours, a significant fall from 47% in 2002. One in three either drive or walk to work, while only one in ten use the tube as their main method of travel.

Figure 6.1. CCZ: Travelling to work before and after the scheme



Amongst commuters, 2% are making more trips and 3% less trips, with 14% making changes to their travel arrangements to work as a direct consequence of the scheme (Figure 6.2).

Figure 6.2. CCZ: Impacts on frequency of commuting



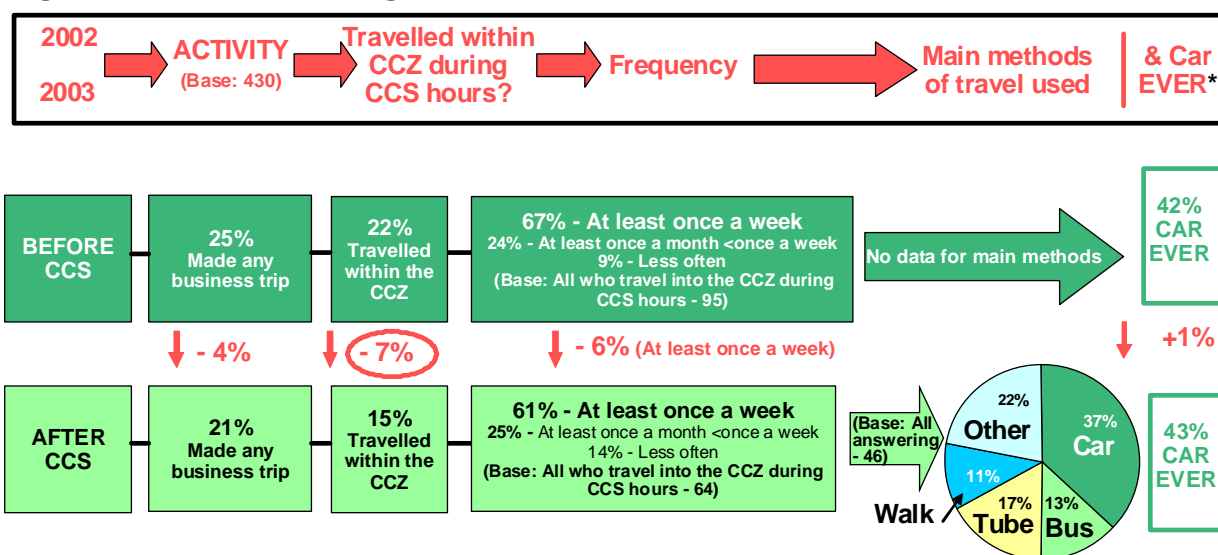
- CCZ members in the Holborn neighbourhood are significantly more likely to drive to work (43%), with social class C1 and C2 households more likely to use the bus for the same purpose (33%).

- Respondents from Borough and Holborn and those from lower income groups (under £20,000) are more likely to have made changes to their travel arrangements when commuting.

6.2. Business trips

Fewer respondents in the CCZ now make business trips within the charging zone during charging hours (15% compared to 22%). Of those who do make these trips, however, the majority continue to do so at least once a week. Car use for business journeys remains consistent with 2002 (Figure 6.3).

Figure 6.3. CCZ: Travelling for business before and after the scheme



Statistically significant

All statistically significant differences between 2002 and 2003 have been highlighted

*CAR DEFINITIONS: 'Ever' refers to all who have ever driven a car or van during the CCS to get to a destination within the zone. ('Car' as shown in the main methods pie chart refers to all who have personally driven a car/van driven for these specific journeys.)

Source: MORI

An example of the impact of the scheme on business trips is given below:

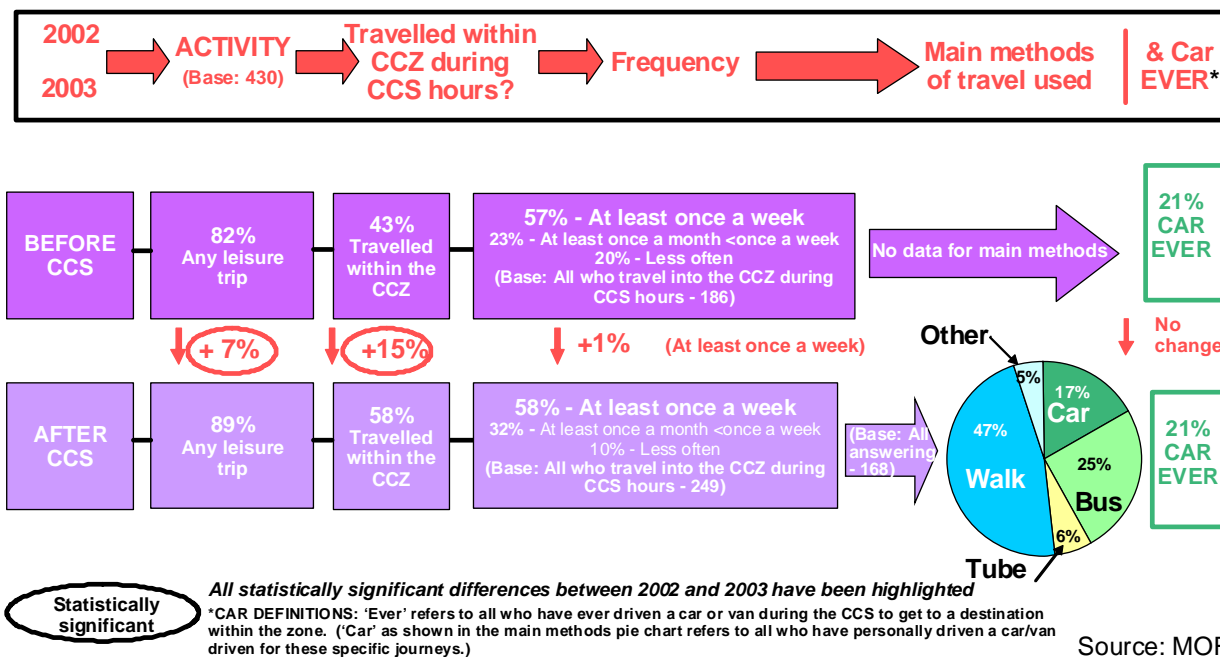
Before it all started I thought it wouldn't really make a difference to traffic within Central London. But today there is an improvement in traffic congestion, noise and pollution. I drive around a lot in my job and it feels better if I don't have to sit through traffic all the time.

Holborn, DE, 35-54, Male, Working, Driver

6.3. Leisure trips

More CCZ respondents now travel within the zone during charging hours, around three-fifths did so in 2003 compared with only two fifths in 2002. Frequency of trips and car use do not significantly differ in comparison to 2002, before the introduction of the scheme.

Figure 6.4. CCZ: Travelling for leisure before and after the scheme



- Respondents from Hoxton, Peckham and social economic group AB are more likely to have made changes to their travel arrangements for leisure trips as a direct result of the scheme. Change in the actual number of journeys is higher in Hoxton and Peckham, where more report making fewer journeys.

6.4. School escort

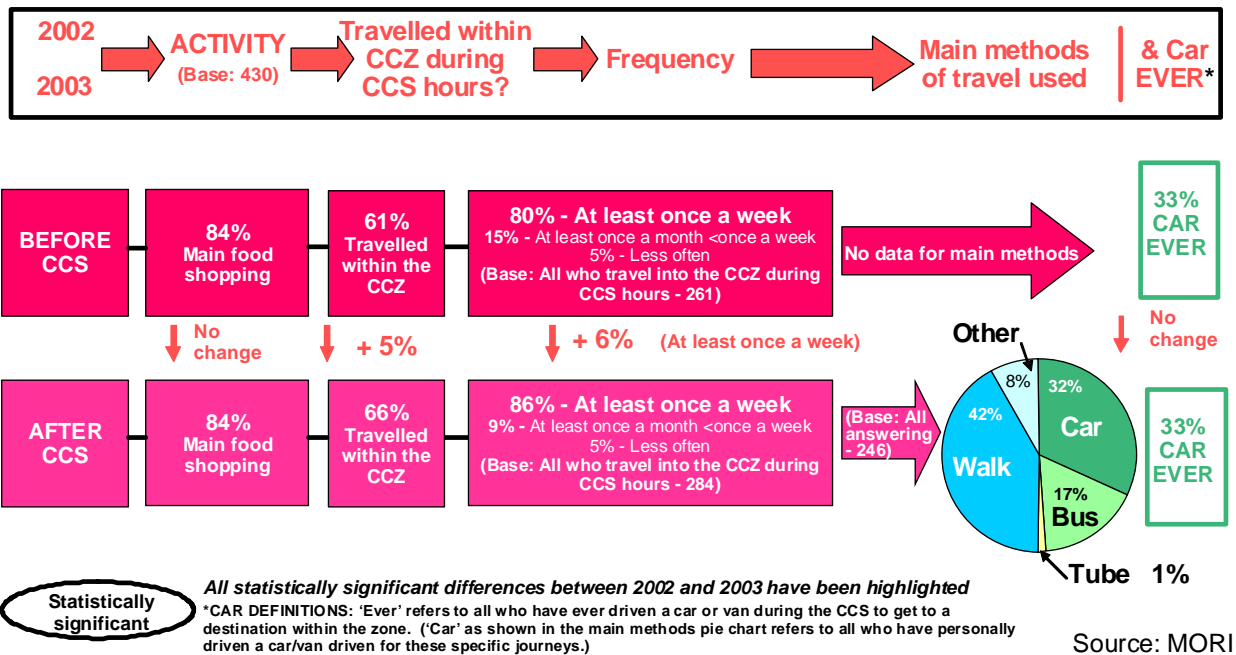
A lower proportion of CCZ members now escort children to and from school or nursery within the CCZ during charging hours (24% in 2002 compared to 19% in 2003). The majority of them (93%) make these trips at least once a week. Again, the most common method of travel is walking (63%) followed by just over a quarter who drive (The bases here are relatively small, therefore charts have not been included).

6.5. Food shopping

The majority of CCZ respondents make main food shopping trips (84%); three-fifths do so within the CCZ during charging hours. The most common main method of travel is walking (42%), followed by car (32%) and bus (17%). In comparison to 2002 there have been no significant changes.

The proportion of respondents who say they have started to do online shopping or do this more often than before the scheme was introduced, increases with distance from the zone (rising from 5% of respondents within the CCZ to 36% beyond the M25). However, the proportion of respondents doing so in response to the charging scheme is higher within the CCZ than beyond the M25 (30% and 12% respectively). Around one fifth of Inner and Outer London respondents who shop online do so because of the charging scheme.

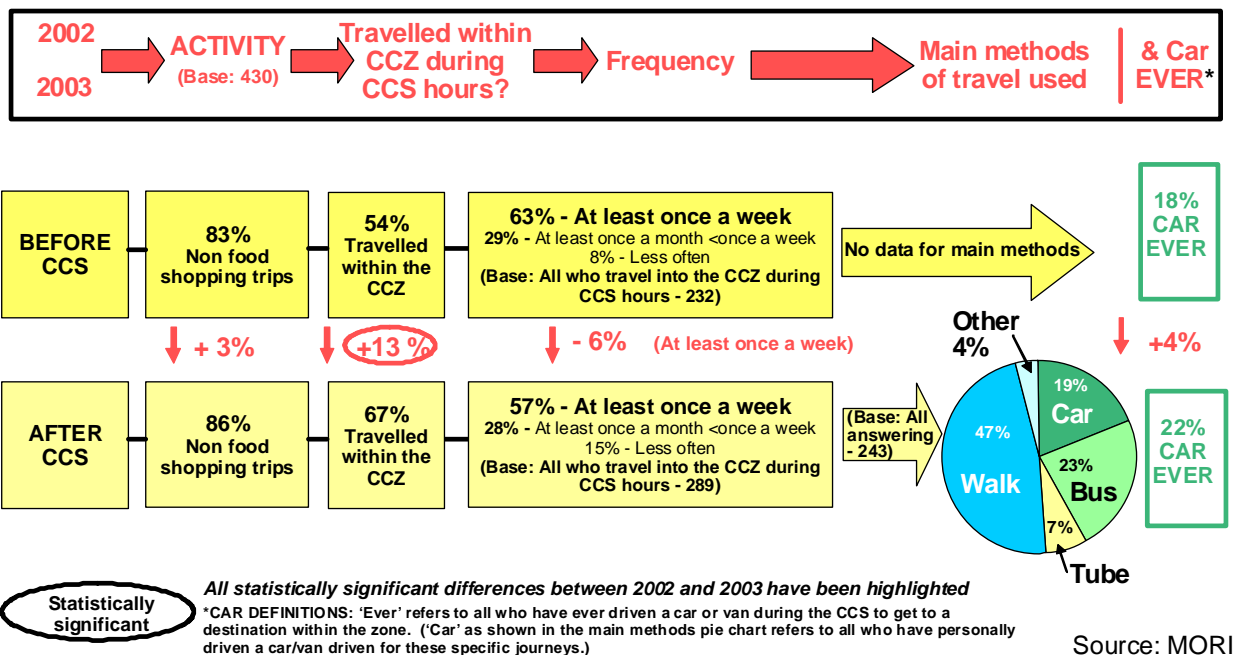
Figure 6.5 CCZ: Travelling for main food shopping before and after the scheme



6.6. Non-food shopping

Two thirds of CCZ respondents now make trips within the CCZ during CCS hours for non-food shopping trips compared to 54% before the introduction of the scheme. The most common main mode of transport for these trips is walking (47%). As with main food shopping trips, frequency and mode of transport used remain similar to 2002 (Figure 6.6).

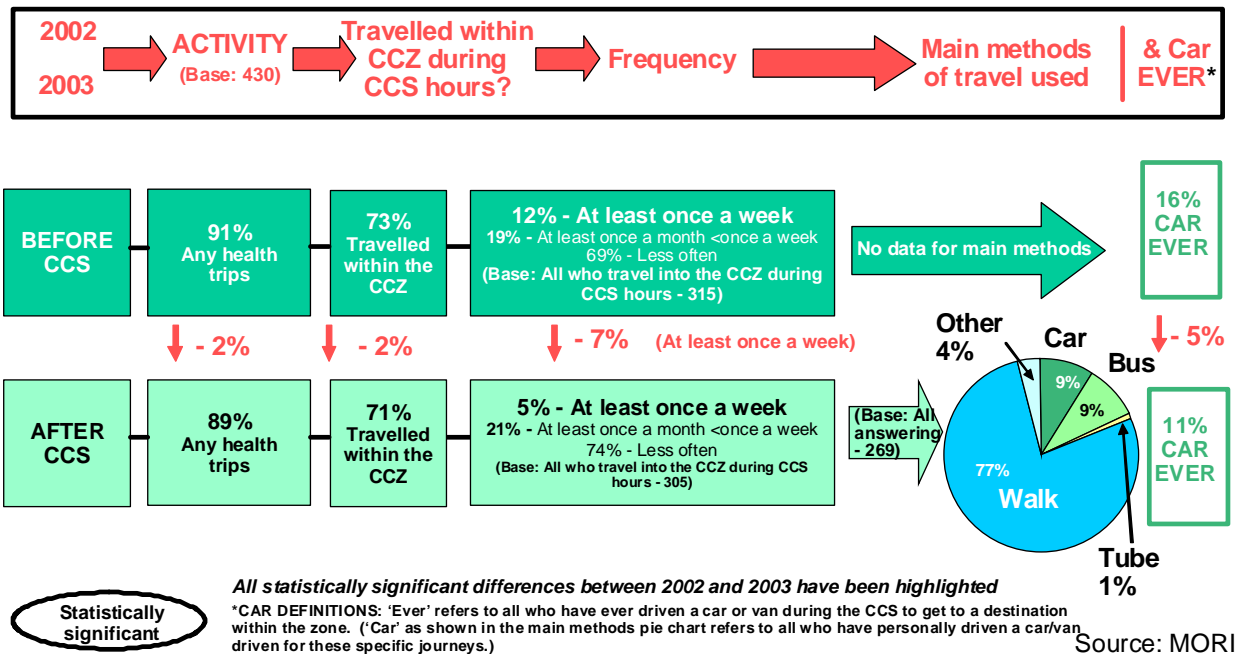
Figure 6.6 CCZ: Travelling for non-food shopping before and after the scheme



6.7. Health trips

The majority of CCZ respondents make health related journeys (89%) and travel within the CCZ during charging hours to do so. Three-quarters walk to their appointments, by far the most popular mode of travel for this type of trip.

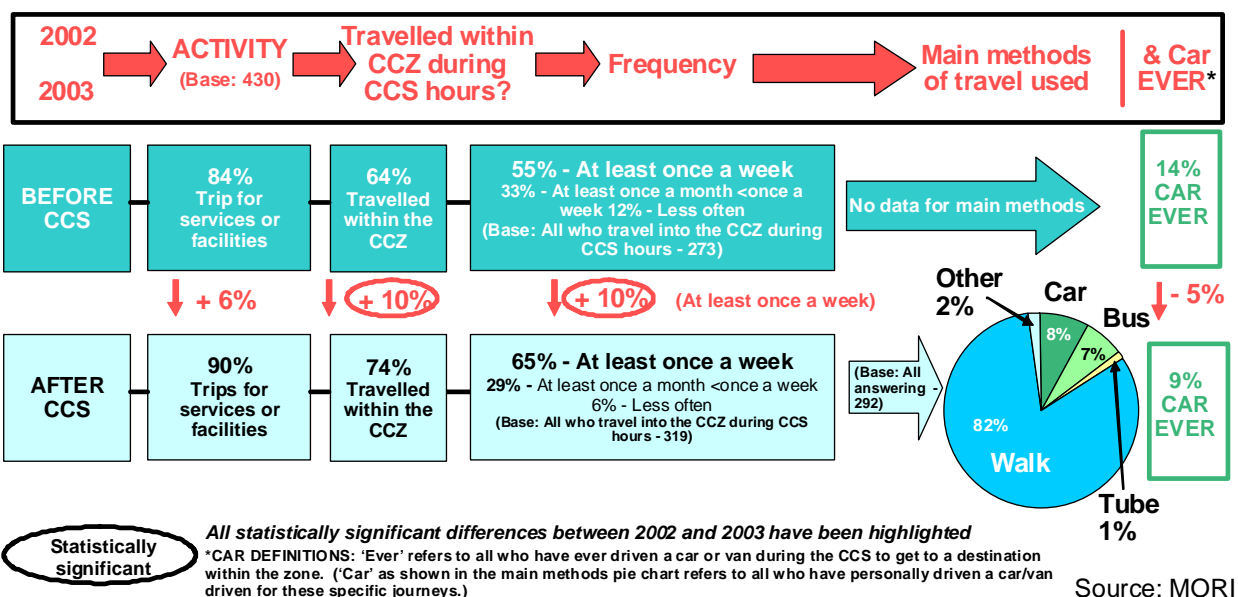
Figure 6.7. CCZ: Travelling for health trips before and after the scheme



6.8. Trips for services and facilities

The majority of the CCZ respondents (90%) make 'service/facility' trips, with around three-quarters travelling within the CCZ during charging hours. CCZ respondents are more likely to make regular 'service/facility' trips, 94% do so at least once a month. The most common main method of travel used is walking.

Figure 6.8 CCZ: Travelling for services or facilities before and after the scheme



Of specific note is the increased proportion who now travel within the zone during charging hours when making trips for services or facilities. Significantly higher proportions make such trips, and make them more frequently.

6.9. Driving within the congestion charging zone

Table 6.1 (below) shows that driving within the zone has decreased since the introduction of the scheme. (Note: The table differs to previous charts. Figures have been calculated by dividing the number who have ever driven a car or van during the CCS to get to a destination within the zone, for each activity, by the all CCZ respondents. Previous charts are based only on those who made each trip type).

However the differences are not statistically significant, indicating that in real terms there has been little impact on car usage for CCZ respondents. The table below also highlights that the most common trip type that respondents use their car for, is making main food shopping trips, a fifth did so in both 2002 and 2003. Use of car is also relatively more common when commuting to work and visiting friends and family.

Table 6.1. CCZ : Driving within the charging zone

And before/since February 2002 have you ever driven a car or van for <selected trip> during the charging hours into or within the zone, even if only occasionally?

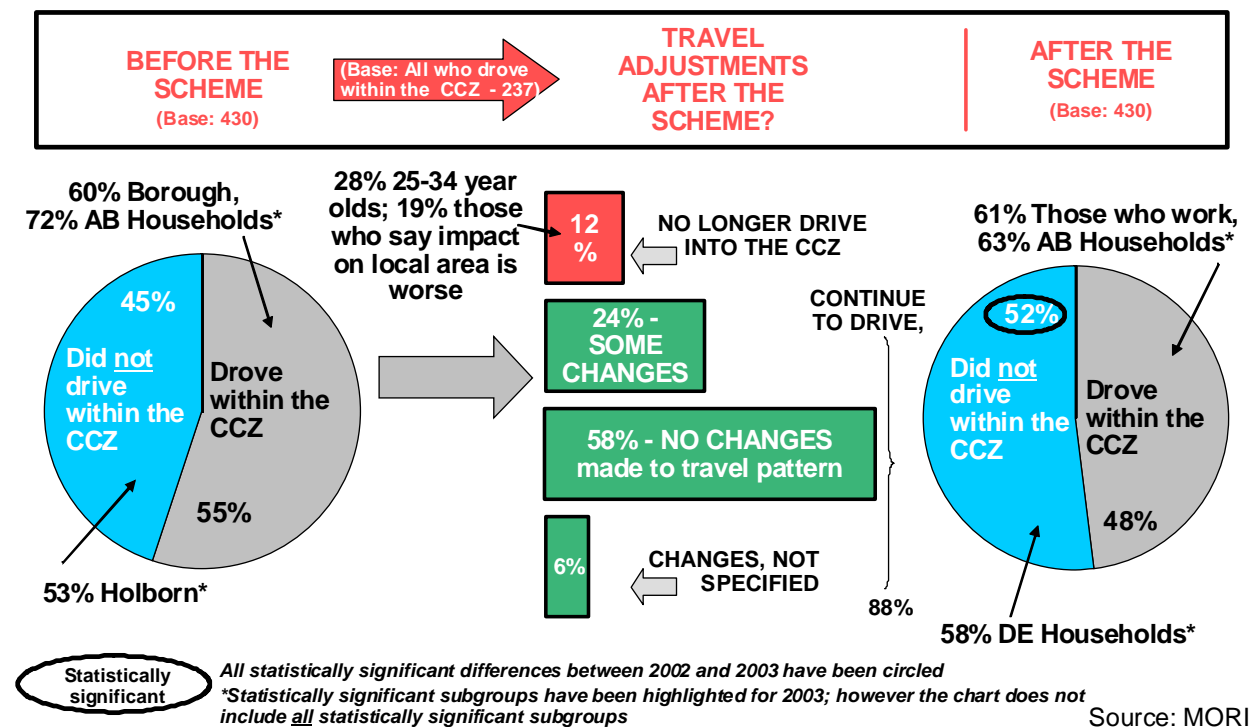
CCZ	Before CCS 2002	After CCS 2003	+/-
<i>Base: (All)</i>	430	430	
	%	%	%
Main food shopping	20	21	+1
Commuted to and from	17	14	-3
Visited friends/family	16	17	+1
Any health trips	12	8	-4
Made any business trip	10	5	-5
Non food shopping trip	10	13	+3
Any leisure trip	9	10	+1
Trip for services or facilities	9	7	-2
Escorted to and from	9	6	-3
To and from school or	3	2	-1
Any activity	42	38	-4

Source: MORI

Figure 6.9 (below) shows the proportion of CCZ respondents who travelled within the zone before and after the introduction of the scheme. Significantly fewer now drive within the zone (48% in comparison to 55% in 2002). Workers and those in social class group AB households are most likely to drive into the CCZ; however those in lower income households and those in Holborn are the most likely not to drive within the zone.

Of those CCZ respondents who drove within the CCZ before the introduction of the scheme, only two-fifths say that they have adjusted their travel as a result of the CCS. The vast majority of them, 88% continue to drive into the zone. Those aged 25-34 years and those who say the CCS has had a negative impact on their local area are significantly more likely to say they no longer drive within the CCZ.

Figure 6.9. CCZ: Driving within the zone

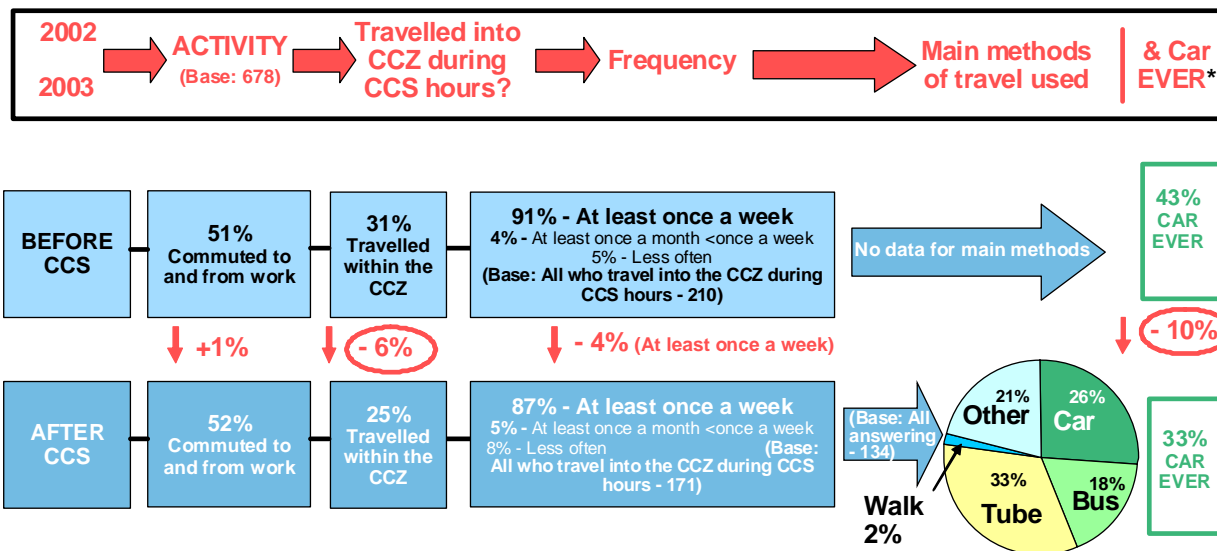


6.10. Inner London - commuting

A quarter of Inner London respondents commute to work into the CCZ during charging hours since the introduction of the CCS, this has fallen significantly by 6% points in comparison to 2002. Of these commuters, a third use the tube as their main method of travel, with 18% travelling by bus and a quarter driving. The proportion who ever use their car to commute has fallen by 10 percentage points from 2002.

- Inner London respondents in the South Kensington neighbourhood are significantly more likely to use the tube to commute to work (47%); whilst a higher proportion in Hoxton are likely to use the bus for the same purpose (40%).

Figure 6.10. Inner London: Travelling to work before and after the scheme



Statistically significant

All statistically significant differences between 2002 and 2003 have been highlighted
 *CAR DEFINITIONS: 'Ever' refers to all who have ever driven a car or van during the CCS to get to a destination within the zone. ('Car' as shown in the main methods pie chart refers to all who have personally driven a car/van driven for these specific journeys.)

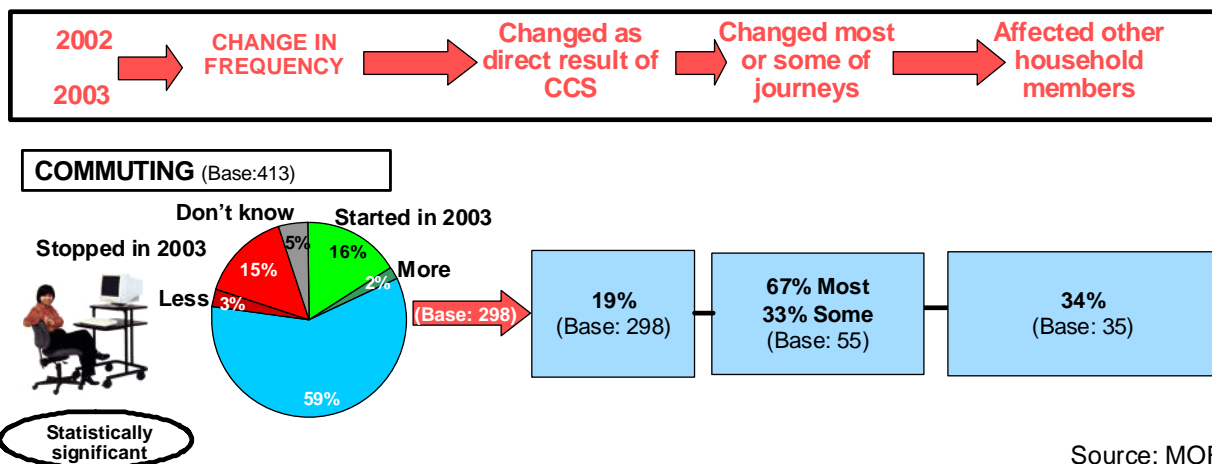
Source: MORI

Of those commuting, one fifth have changed their travel arrangements as a direct result of the charging scheme. Of these, two-thirds reported making changes to most of their trips (Figure 6.10).

I find that congestion is less and that is quite good. Also it generally takes a little less time to get to work and things are looking up

Holborn, Over 30 no children, C1C2, 35-54, Female, Working, Driver

Figure 6.11. Impacts on frequency of commuting



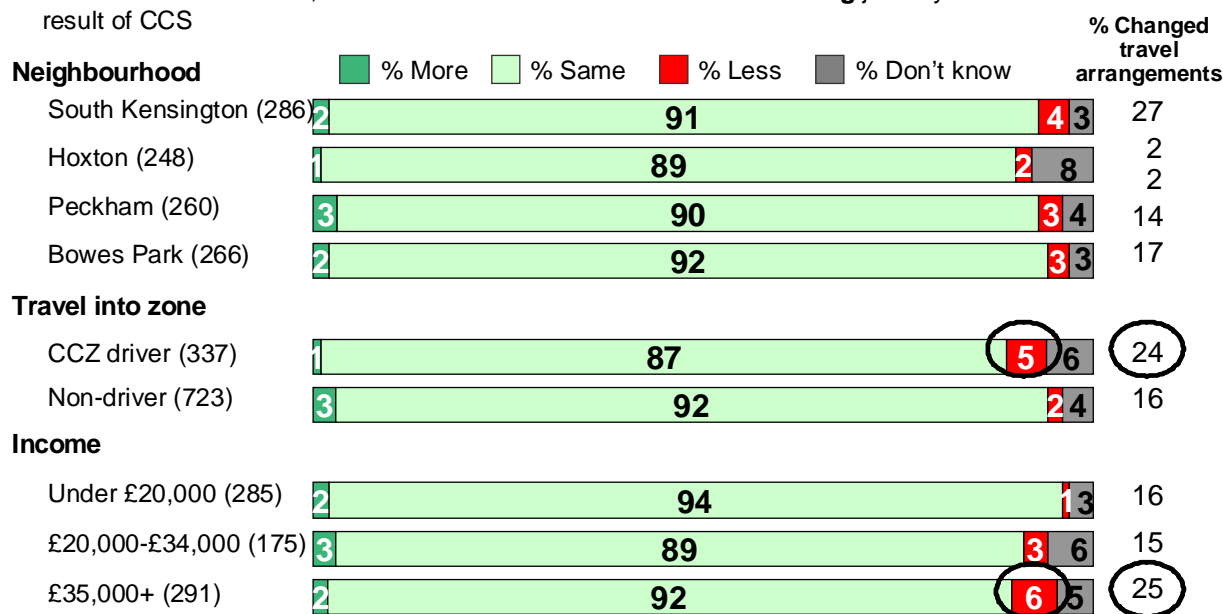
Source: MORI

Of those who made changes to their commuting arrangements, twelve respondents report that this affected other household members (Figure 6.11).

- CCZ drivers and higher income households are more likely to have made changes to their travel arrangements as a direct result of the scheme (Figure 6.12).

Figure 6.12. Inner London: Change in commuting journeys

... whether make more, less or about the same **number of commuting** journeys as a direct result of CCS



Statistically significant

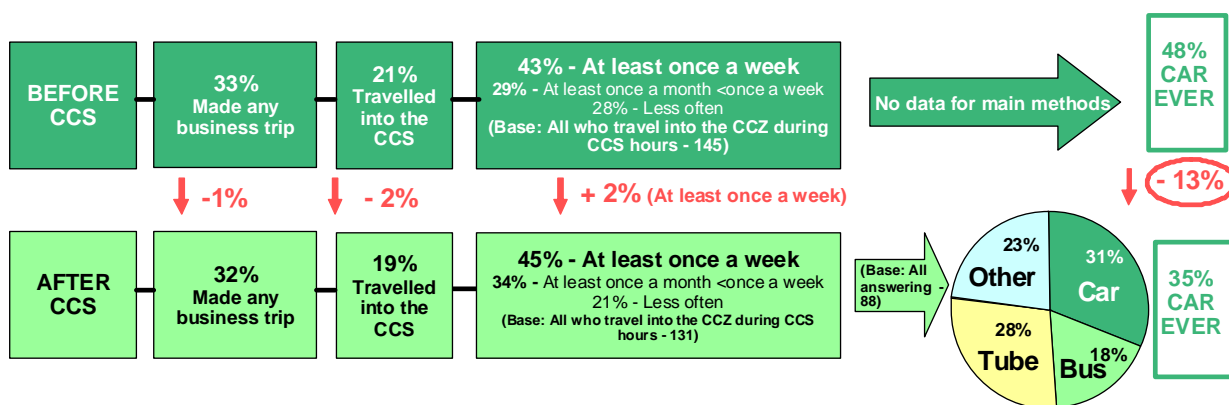
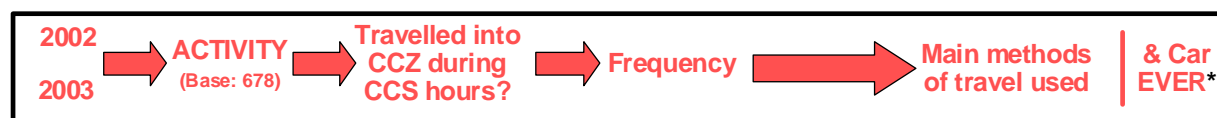
Base: All Inner London respondents who commute

Source: MORI

6.11. Business trips

Of particular note is the decrease in those who 'ever' drive for business into the CCZ, which has fallen by 13 percentage points since the introduction of the scheme, and that only 35% now ever use the car for business trips.

Figure 6.13. Inner London: Travelling for business before and after the scheme



Statistically significant

All statistically significant differences between 2002 and 2003 have been highlighted

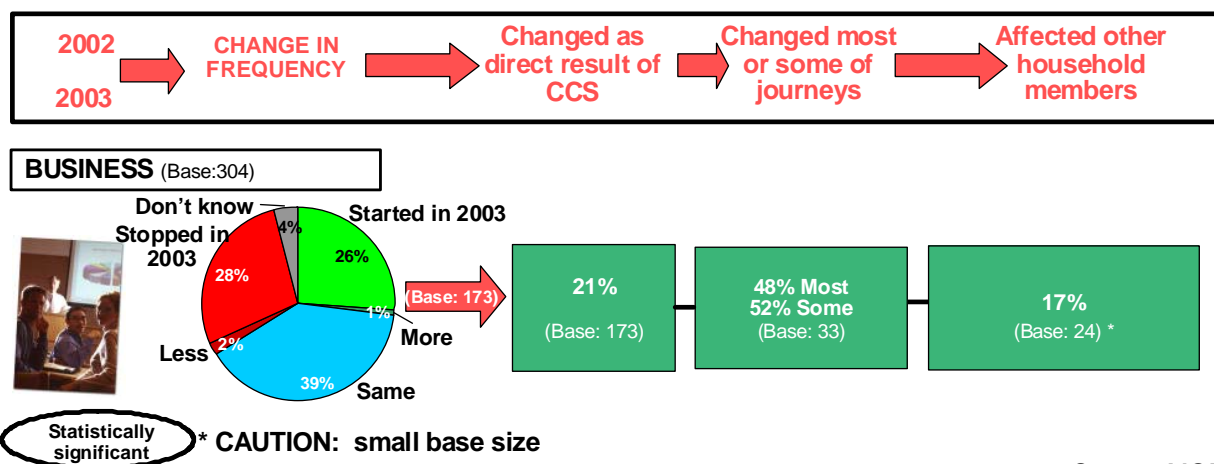
*CAR DEFINITIONS: 'Ever' refers to all who have ever driven a car or van during the CCS to get to a destination within the zone. ('Car' as shown in the main methods pie chart refers to all who have personally driven a car/van driven for these specific journeys.)

Source: MORI

While the amount of business trips into the CCZ during charging hours has remained unchanged since the introduction of the scheme, there is significant change in who is making these trips, much of this being attributable to natural churn. Around a quarter are making business trips now who did not do so in 2002 with a similar proportion ceasing to make these trips compared to before charging.

A fifth say they have made changes to their travel arrangements as a direct result of the scheme, and half of these say that most of their business trips have been affected (Figure 6.14).

Figure 6.14. Inner London: Impacts on frequency of bus trips



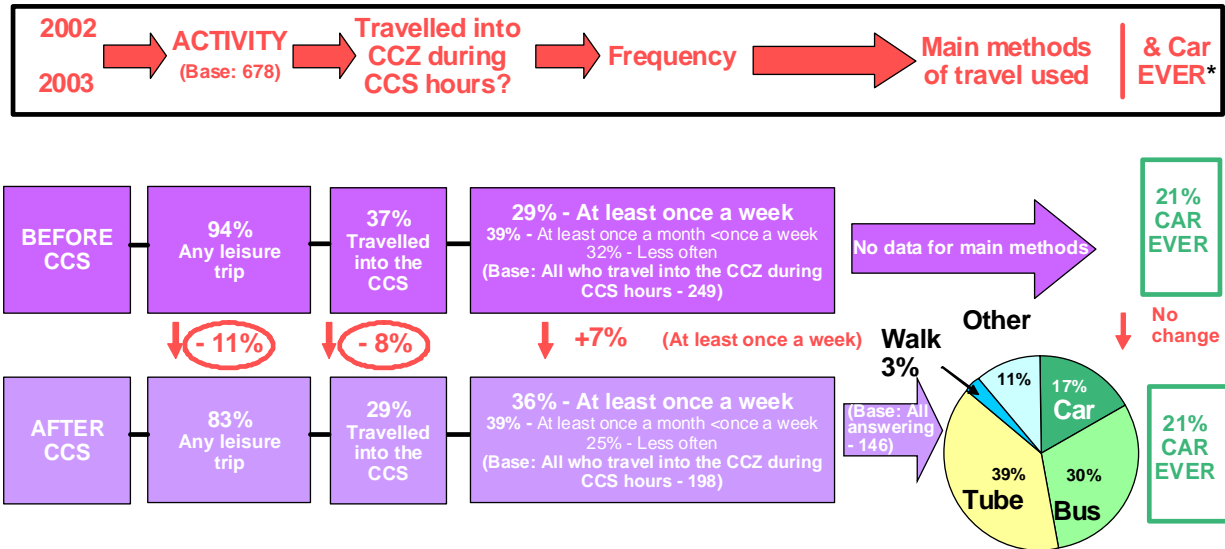
Source: MORI

- Those who say that the CCS has affected them to a 'great/fair extent' at a personal level are also significantly more likely to be car/van drivers (47%) on business trips into the zone, while those who say that the personal impact of the scheme has been limited are significantly more likely to be public transport (particularly tube (39%)) users.

6.12. Leisure trips

Inner London respondents are now significantly less likely to make leisure trips into the CCZ during CCS hours, (with 29% travelling into the zone during charging hours compared to 37% before - Figure 6.15).

Figure 6.15. Inner London: Travelling for leisure before and after the scheme



Statistically significant

All statistically significant differences between 2002 and 2003 have been highlighted

*CAR DEFINITIONS: 'Ever' refers to all who have ever driven a car or van during the CCS to get to a destination within the zone. ('Car' as shown in the main methods pie chart refers to all who have personally driven a car/van driven for these specific journeys.)

Source: MORI

As one respondent said;

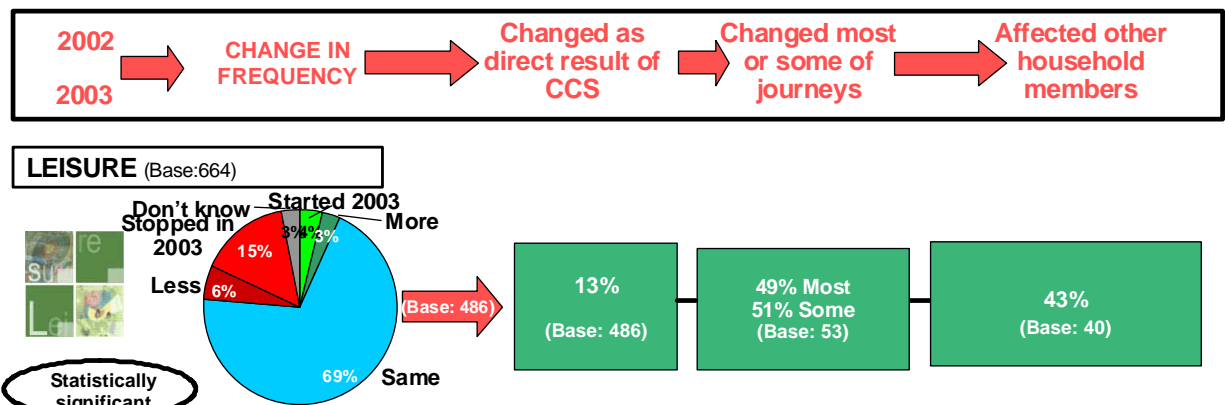
More traffic on route because of charge. To go to Oxford Street is too awkward; it is not worth the bother. I've been up there once with my son and wouldn't again. It is just getting there and getting back, couldn't get a bus there, it is just ridiculous.

Peckham, C1C2, 25-34, Female, Working, Non CCZ Driver

Over one in ten CCZ respondents have made changes to their travel arrangements for leisure trips in the CCZ as a result of the scheme, half of these making changes to most of their trips.

Of those who have made changes to their travelling for leisure, 40 respondents reported an impact on other household members; as illustrated below.

Figure 6.16. Inner London: Impacts on frequency of leisure trips

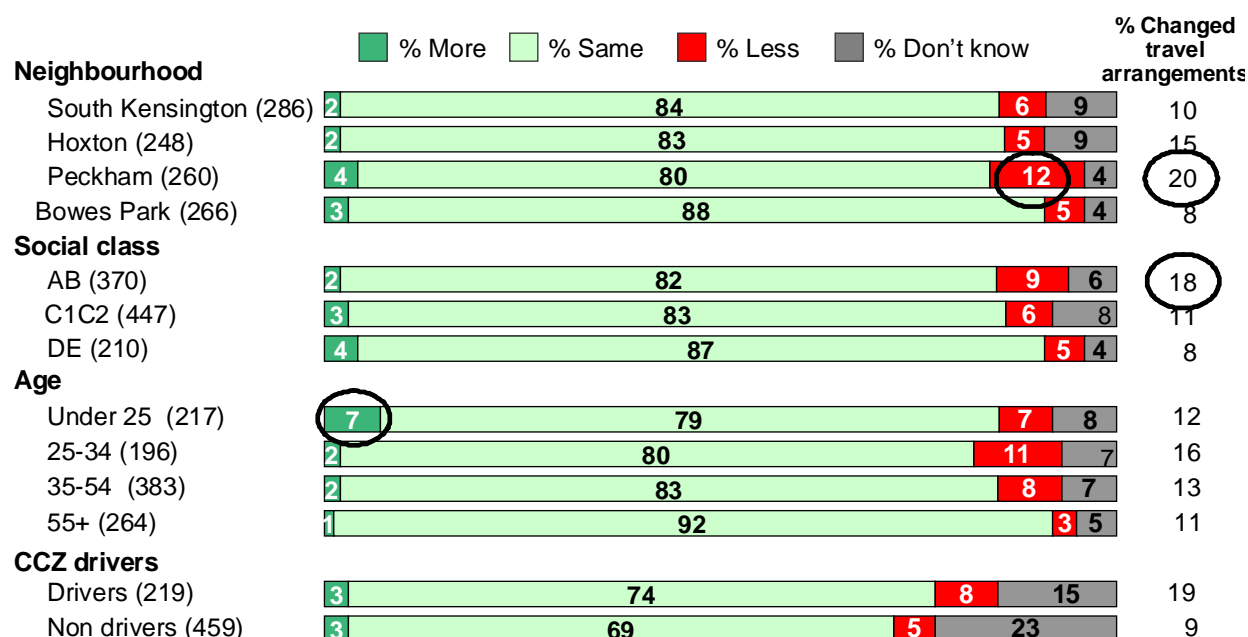


Source: MORI

- Respondents from Peckham and those from social class AB are significantly more likely to make fewer leisure trips into the CCZ as a direct result of the charging scheme (Figure 6.17).
- Those under 25 are more likely to have increased the number of trips they make into the CCZ for leisure.

Figure 6.17. Inner London: Change in leisure trips

... whether make more, less or about the same number of leisure trips as a direct result of CCS



Statistically significant

Base: All Inner London respondents who make leisure trips

Source: MORI

6.13. School escort

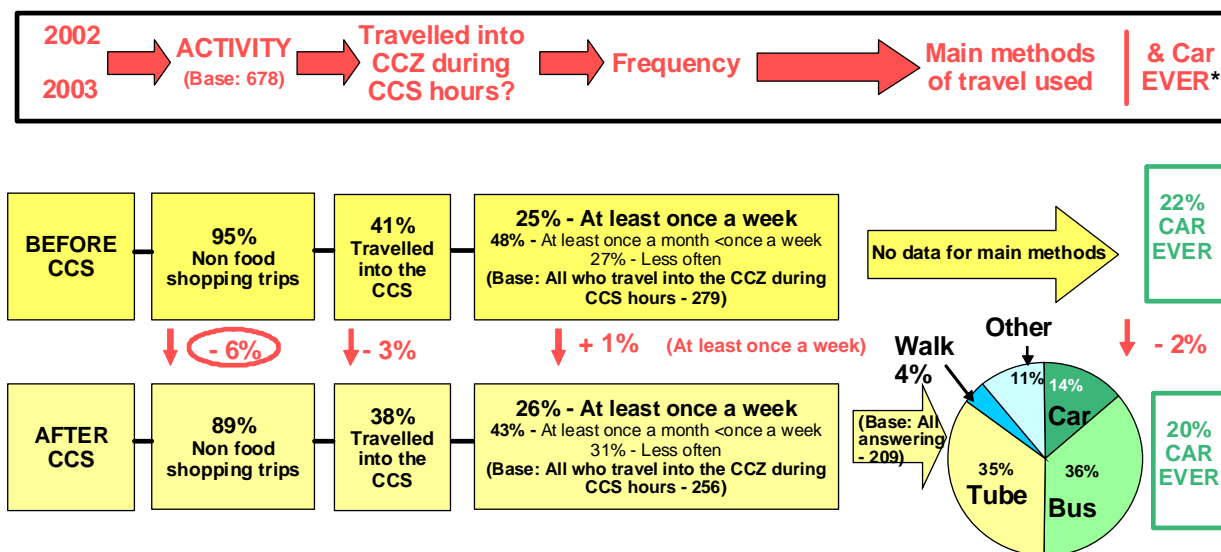
While a quarter of Inner London respondents with children escort children to and from school or nursery, only 2% travel into the charging zone during CCS hours to do so. Again the majority of them (88%) make these trips at least once a week, the most common method of travel is walking (50%) followed by a quarter who drive. The proportion of those who use a car has fallen dramatically in comparison to 2002. Now only 23% say they ever use their car when escorting children to school or nursery (inside the CCZ) this compares to 61% who did so before the CCS. (Bases are very small so charts have not been included).

6.14. Food shopping

While the majority (87%) make main food shopping trips, very few travel into the CCZ during CCS hours to do so (10%). Those who still do so are travelling less frequently than they did before the introduction of the scheme (only 69% now do so at least once a week, compared to 89% in 2002). The most common main method of transport is the bus (40%), followed by car.

6.15. Non-food shopping

Figure 6.18. Inner London: travelling for non-food shopping before and after the scheme



Statistically significant

All statistically significant differences between 2002 and 2003 have been highlighted

*CAR DEFINITIONS: 'Ever' refers to all who have ever driven a car or van during the CCS to get to a destination within the zone. ('Car' as shown in the main methods pie chart refers to all who have personally driven a car/van driven for these specific journeys.)

Source: MORI

Non-food shopping trips are undertaken by 89% of respondents in 2003 compared to 95% in 2002. However, the proportion shopping in the CCZ during charging hours has reduced only slightly from 41% to 38%. The most common main method of transport for these trips is the bus (36%), followed by tube (35%). Car usage for non-food shopping remains relatively unchanged in comparison to 2002.

An example of the impact of the scheme on non-food shopping trips is given below:

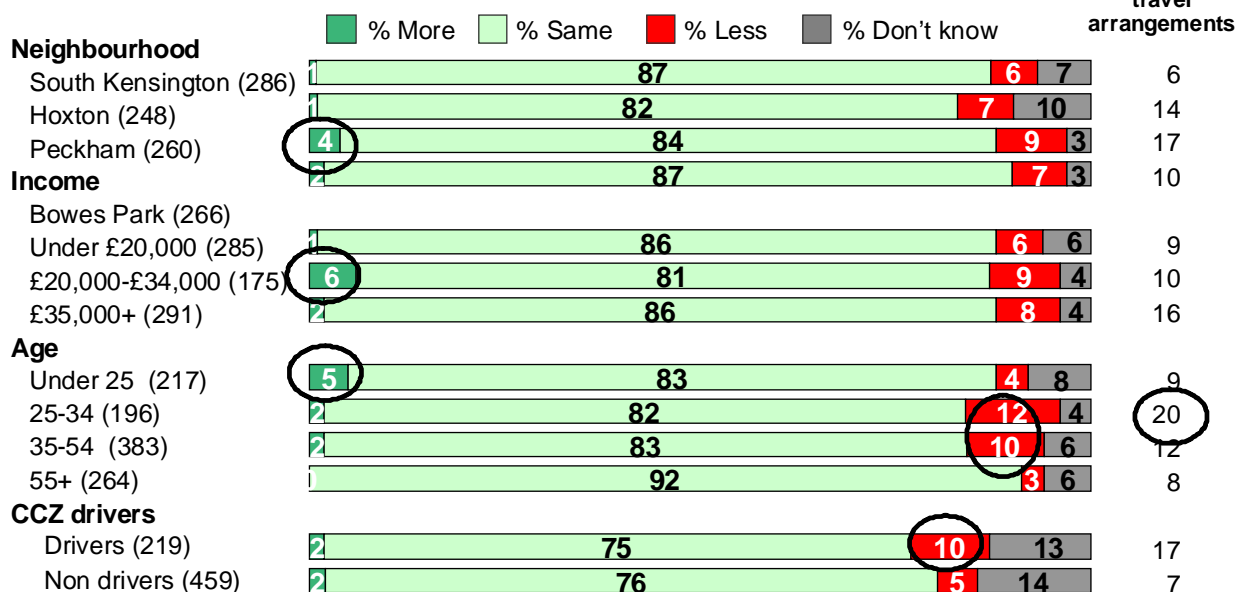
I am no longer free to travel where I want. I used to shop in M&S Oxford Street and no longer go there. There seems to be fewer parking meters and less residents parking in some areas. We are confused by traffic wardens giving tickets on Jan 1st which we thought was a bank holiday

South Ken, C1C2, 55+, Male, Working, Non CCZ Driver

- Those most likely to have made changes to the number of non-food shopping trips include respondents from Peckham, those from mid-income households and shoppers aged 25-54.

Figure 6.19. Inner London: Change in non-food shopping

... whether make more, less or about the same number of other shopping journeys as a direct result of CCS



Statistically significant

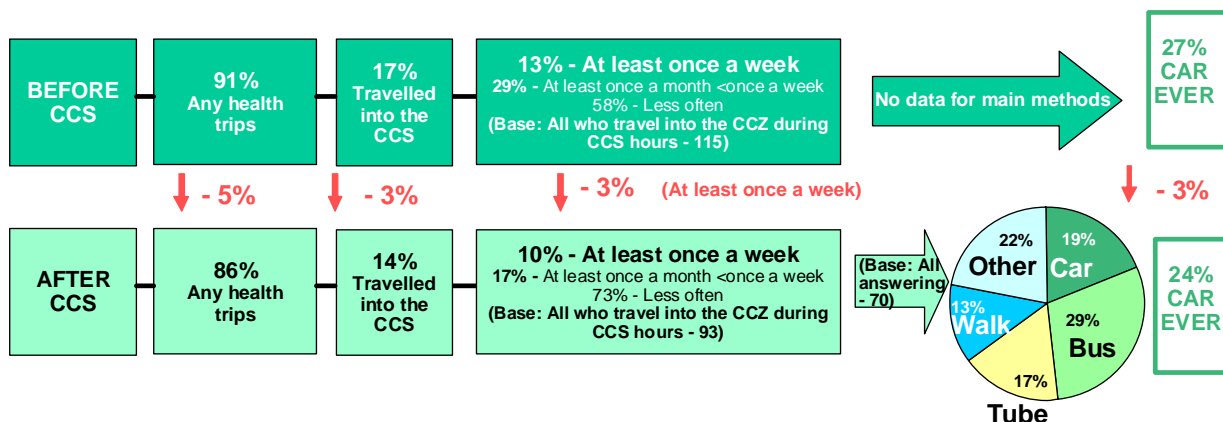
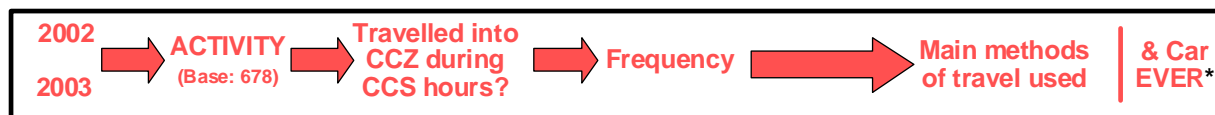
Base: All Inner London respondents who non-food shop

Source: MORI

6.16. Health trips

One in seven Inner London respondents travel into the CCZ during CCS hours for health trips, and a quarter do so at least once a month. The most popular method of transport is the bus (29%). Car usage is relatively unchanged from the level recorded before the introduction of the charge (Figure 6.20).

Figure 6.20. Inner London: Travelling for health trips before and after the scheme



Statistically significant

All statistically significant differences between 2002 and 2003 have been highlighted

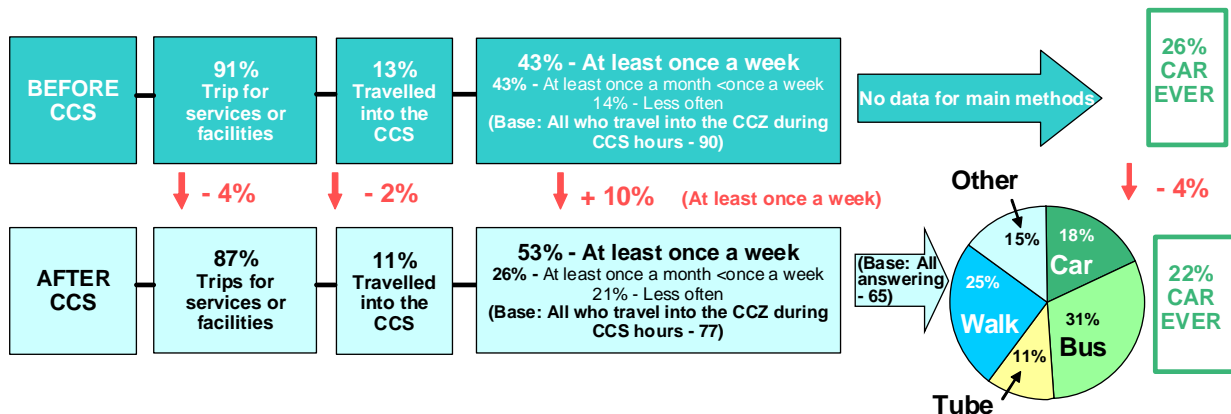
*CAR DEFINITIONS: 'Ever' refers to all who have ever driven a car or van during the CCS to get to a destination within the zone. ('Car' as shown in the main methods pie chart refers to all who have personally driven a car/van driven for these specific journeys.)

Source: MORI

6.17. Trips for services and facilities

Figure 6.21 (below) shows current travel arrangements when making trips for services or facilities, such as to the bank, hairdressers or post office and health trips to the dentists or doctors. Very little has changed since the introduction of the charging scheme.

Figure 6.21. Inner London: Travelling for services or facilities before and after the scheme



Statistically significant

All statistically significant differences between 2002 and 2003 have been highlighted
 *CAR DEFINITIONS: 'Ever' refers to all who have ever driven a car or van during the CCS to get to a destination within the zone. ('Car' as shown in the main methods pie chart refers to all who have personally driven a car/van driven for these specific journeys.)

Source: MORI

6.18. Driving into the congestion charging zone

Table 6.2 below shows a fall in driving for the majority of purposes taking the base of all Inner London respondents rather than just those who have undertaken a specific activity.

Table 6.2. Inner London: Comparison of car usage by journey purpose

And before/since February 2002 have you ever driven a car or van for <selected trip> during the charging hours into or within the zone, even if only occasionally?

Inner London	Before CCS 2002	After CCS 2003	+/-
<i>Base: (All Inner London respondents)</i>	678	678	
	%	%	%
Commuted to and from work	13	8	-5*
Visited friends/family	12	9	-3
Made any business trip	10	6	-4
Non food shopping trip	9	7	-2
Any leisure trip	8	5	-3
Any health trips	5	3	-2
Main food shopping	3	3	0
Trip for services or facilities	3	2	-1
Escorted to and from school/nursery	2	1	-1
To and from school or college	1	1	0
Any activity	37	24	-13*

* Statistically significant

Source: MORI

The table highlights that the proportion who have ever driven a car or van during the charging hours into the zone for any activity has fallen significantly in comparison to 2002. Before the scheme around two-fifths drove into the zone, after the scheme only a quarter do so. However when analysed on a trip by trip basis the results are less dramatic, although the majority of trip types have seen car usage fall, the findings are not statistically significant.

An example of the impact of the scheme on people driving during charging hours is given below:

Commuting trips show the greatest reduction in car usage, falling from 13% to 8%.

Taking tubes and cabs more often to avoid charge. My wife used to drive a lot and now she never does, she does to avoid congestion charge and she gets the tube instead

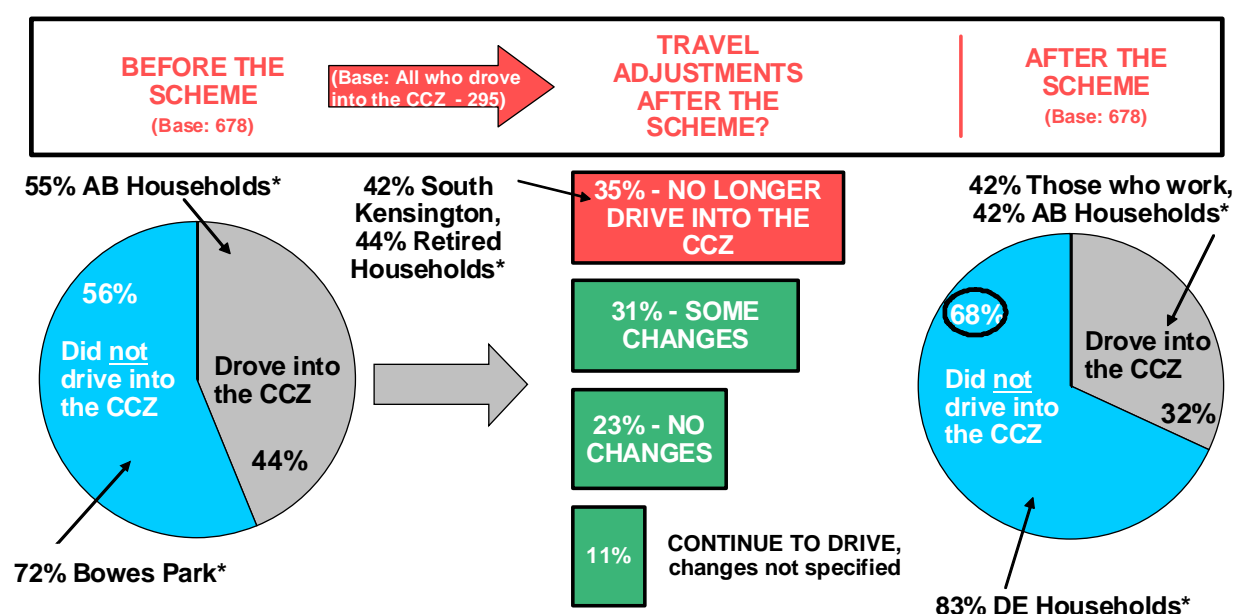
Bowes Park, AB, 25-34, Male, Working, Non CCZ Driver

Since the introduction of the scheme, the trip that respondents are most likely to use their car for is when visiting friends or family in the zone.

Figure 6.22 shows the proportion of Inner London respondents who drove into the zone before and after the introduction of the scheme. Significantly fewer now drive into the zone, 32% in comparison to 44% in 2002. Workers and those in social class group AB households are most likely to drive into the CCZ; correspondingly those in lower income households and those in Bowes Park are the most likely not to drive into the zone.

Of those who drove into the CCZ before the introduction of the scheme, around four-fifths (77%) say that they have adjusted their travel as a result of the charging scheme. However the majority of them (65%) continue to drive into the zone. Those in South Kensington and those from retired households are significantly more likely to say they no longer drive into the CCZ.

Figure 6.22. Inner London: Driving into the zone



Statistically significant

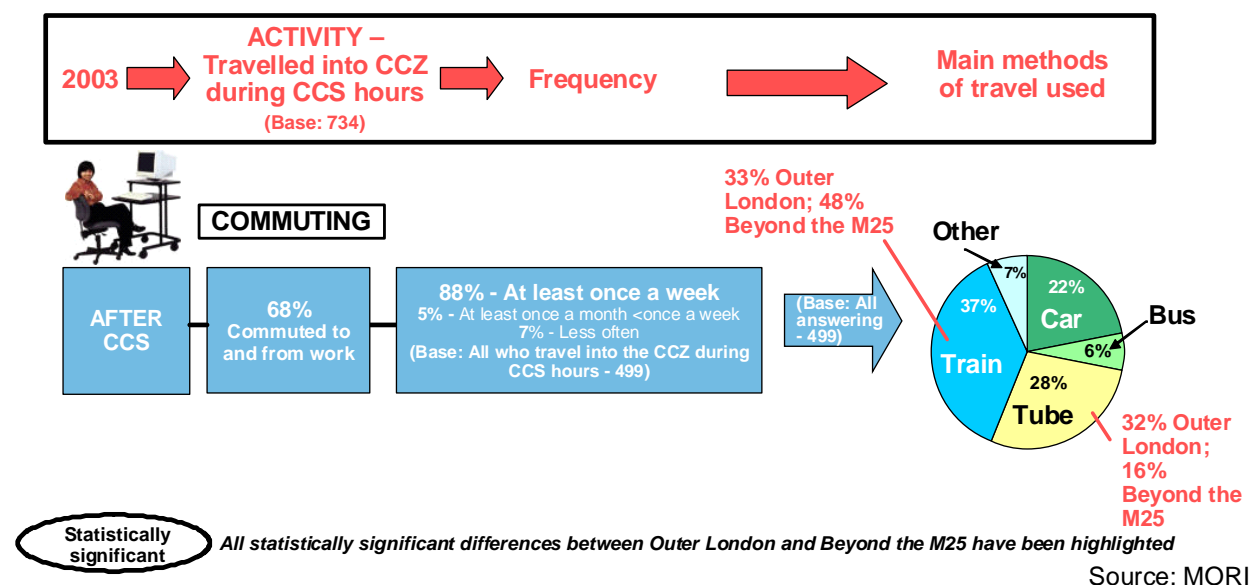
All statistically significant differences between 2002 and 2003 have been circled
*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

Source: MORI

6.19. Outer London and beyond the M25 - general travel behaviour

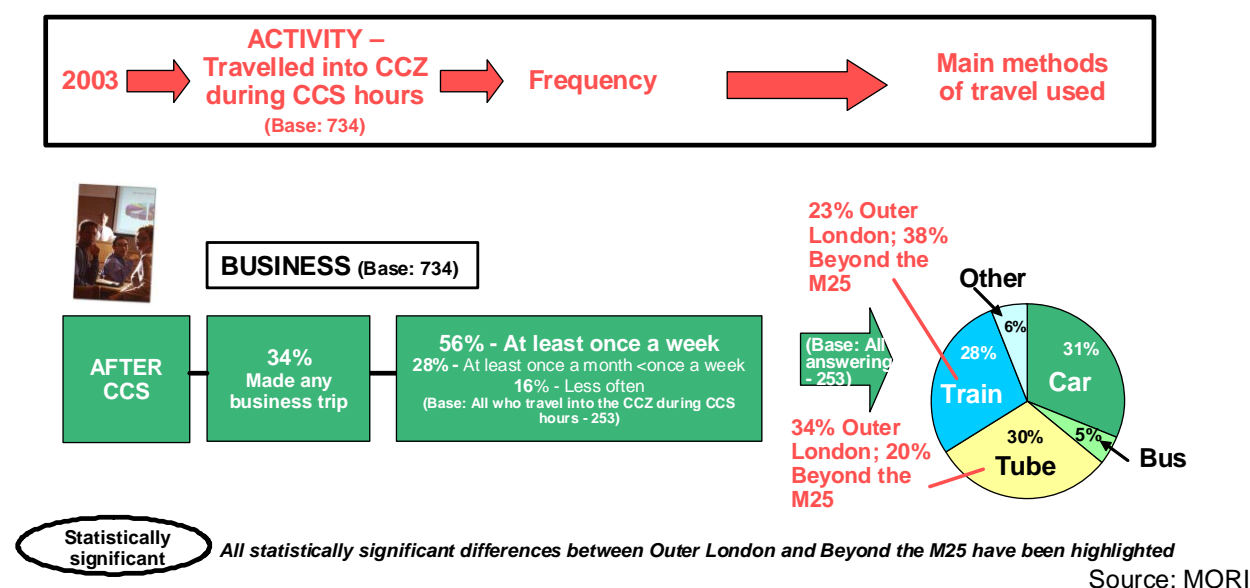
Around two-thirds of respondents in Outer London and beyond the M25 commute to work into the CCZ during CCS hours. The most common method of transport for commuting is by train, followed by the tube and the car. Those who travel from beyond the M25 are significantly more likely to travel by train (48% compared to 33% from Outer London). Outer London respondents are more likely to travel by tube, related to the provision of this mode across the area (32% compared to 16% beyond the M25). No general travel behaviour data was collected in 2002, only selected tour information was recorded.

Figure 6.23. Outer London and beyond the M25: Travelling to work



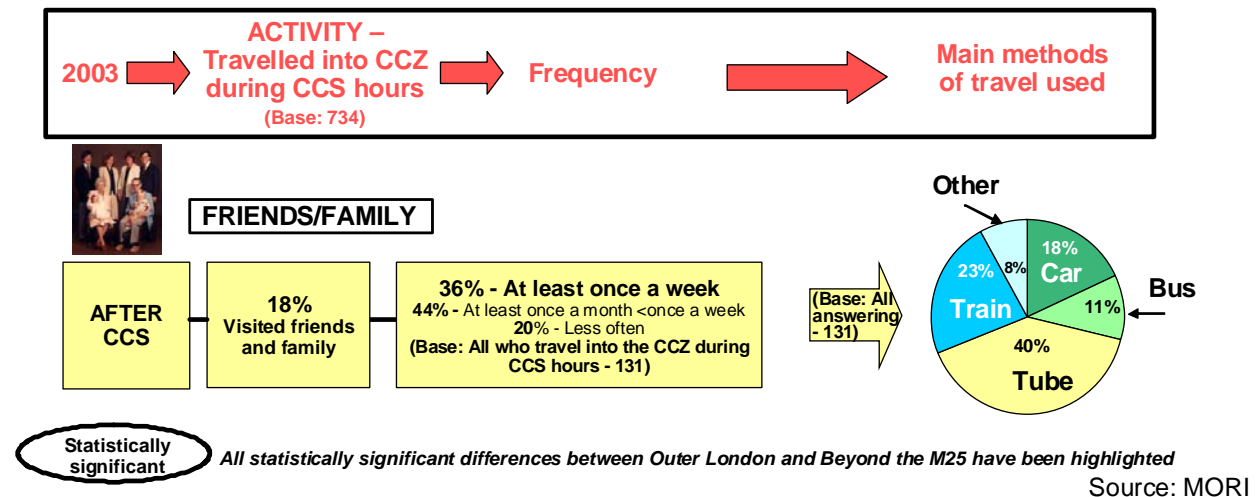
Just over a third of respondents from Outer London and beyond the M25 make business trips into the zone: 56% do so at least once a week, the most common method is by tube (although the differing use of train/tube by Outer London/beyond the M25 respondents again emerges).

Figure 6.24. Outer London and beyond the M25: Travelling for business



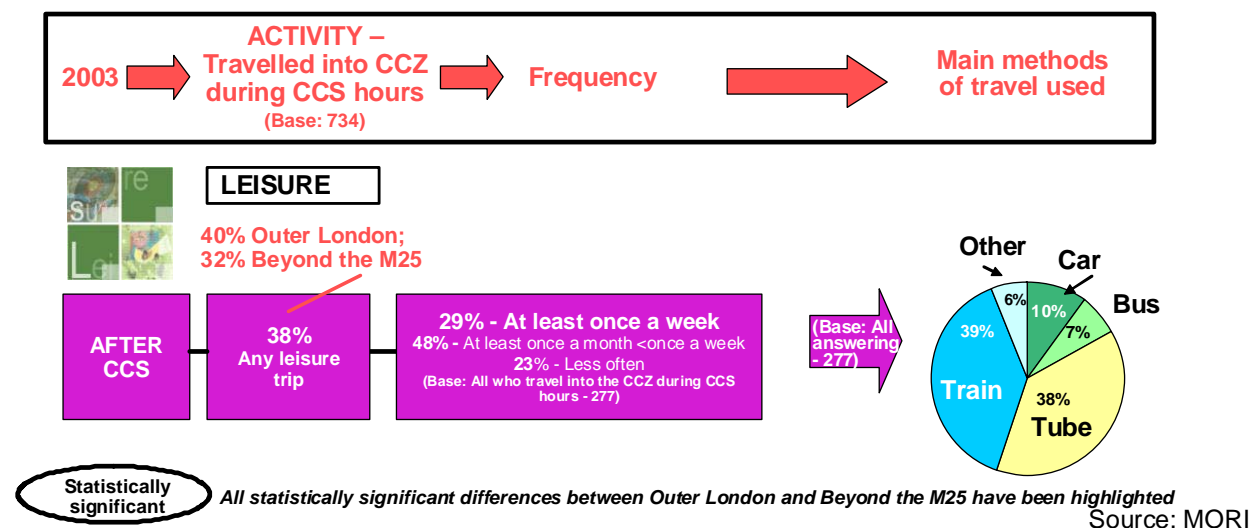
Only a fifth visit friends and family in the zone. Around a third (36%) do so at least once a week and the most common mode used is the tube (related to the higher proportion of Outer London respondents making these trips overall). Men are significantly more likely to drive in comparison to women (25% compared to 8%) when visiting family and friends.

Figure 6.25. Outer London and beyond the M25: Travelling to visit friends and family



Approaching two-fifths of respondents make any leisure trip into the CCZ, with a significantly higher proportion from Outer London than beyond the M25 (40% compared to 32%). Just under half make these trips between once a week to once a month and the tube or train are the most common methods of travel. Those who drive tend to have a negative view of the scheme (24%).

Figure 6.26. Outer London and beyond the M25: Travelling for leisure



6.20. Driving into the congestion charging zone

Amongst these CCZ drivers there has been a polarised impact, around half say they have now adjusted their travel patterns, while the remaining half report no changes as a direct result of the CCS. No general travel behaviour data was collected in 2002, only selected tour information was recorded.

Of those who are drivers and live in Outer London or beyond the M25, 70% had driven into the zone before the introduction of the scheme in 2002. Those most likely to drive regularly into the zone now are workers and come from households which feel they have lost as a result of the scheme. Seven percent now drive into the zone who did not in 2002, while 56% of those who do not drive in the CCZ, say they did do in 2002 (with the majority doing so only occasionally).

- Overall, she believes that the scheme has made no difference to her, which is as she expected. However she had thought that her household would lose but now she believes it has no overall impact on the rest of the family either.
- She thinks that her local area overall is the same as before the scheme, although she considers noise, pollution, availability of public transport, and sense of safety and community are worse.

7. Impacts of the congestion charging scheme on the use of time

This section comments on the effect the charging scheme has had on the time spent travelling overall and on different activities.

Congestion charging zone (CCZ) neighbourhoods

While the majority of respondents spend a similar amount of time travelling as they did before the introduction of the charge, for the remainder slightly less time is spent travelling on each trip and overall, in line with anticipation. The majority of those who have changed the amount of time they spend travelling attribute the change to the congestion charging scheme.

Most CCZ respondents spend the same amount of time at home now as before the charging scheme, with the remainder spending more time than less at home (particularly among respondents living in Borough) and a significant proportion attributing these changes to the scheme.

Inner London neighbourhoods

Around two-thirds of Inner London respondents say they spend the same time travelling now as they did before the introduction of the charging scheme. Of those who have changed, slightly more spend more than less time travelling now than before, in line with expectations.

More time is now spent at home, this is particularly true among respondents living in Hoxton.

Outer London and beyond the M25

A third of respondents who expected their journeys into the zone to be quicker prior to the introduction of the scheme have actually experienced this. While 27% expected a slower journey, only 20% say that in reality that has actually occurred, with 42% believing their travel time to be unchanged.

7.1. Congestion charging zone - time spent travelling

There is little difference between the responses given to the change in time spent travelling for each trip and overall. In line with expectations, apart from those living within the congestion charging zone that have seen no change in their travelling time (62%), the remainder are spending less time than more travelling since the introduction of the charge. This is related to the reduction in traffic within the zone.

CCZ Respondents

Of the 95 respondents who feel they now save time on their selected journey, the vast majority (81%) report saving 15 minutes or less, with the most common time savings being 10 minutes (28% of respondents) and 5 minutes (23%).

A wider spread of views of time lost on the selected journey occurs amongst the 45 respondents who feel their journey now takes longer. 56% of respondents report losing up to 15 minutes on their journey following introduction of the charging scheme, while a third (36%) lose between 20 minutes to an hour.

Inner London

Two thirds of respondents who feel their journey is quicker following the introduction of the charging scheme, say they now save up to 15 minutes on their selected journey. As with CCZ respondents, the most commonly saved length of time is 10 minutes (26%).

The amount of time lost on the selected journey is slightly higher amongst Inner London respondents than CCZ respondents, with 41% saying they now lose between 20 minutes to an hour and 51%, 15 minutes or less

Table 7.1 CCZ: Time spent travelling expected compared with experience

Considering all the journeys (you make do you think you will be spending more or less time travelling?) in London as a whole you have made since the scheme was introduced in February this year, do you think you spend more, less or about the same time travelling overall?

And do you think you spend more, less or about the same time travelling for each trip now than before the scheme was introduced?

CCZ	Overall			Each trip
	Expectation 2002	Experience 2003	+/-	Experience 2003
<i>Base: All respondents</i>	(430) %	(430) %	%	(430)
Less time travelling now	16	21	+5	23
Same	76	62	-14	61
More time travelling now	8	16	+8	13
Other/DK	0	1	+1	3

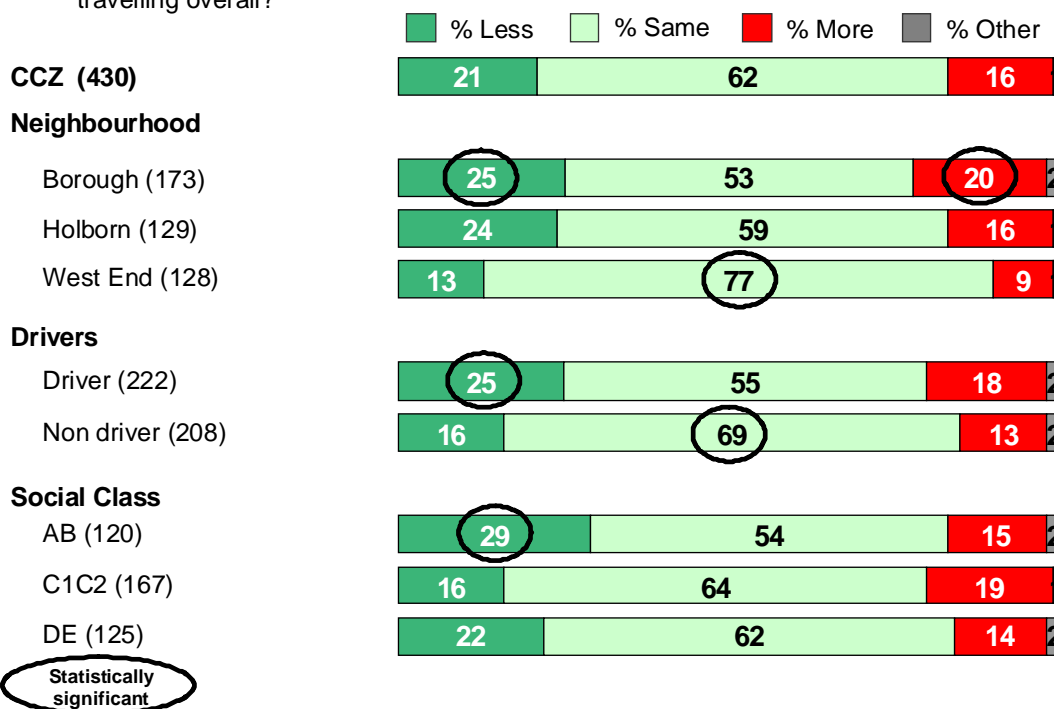
Source: MORI

The majority of CCZ respondents who now spend either more or less time travelling say that the congestion charging scheme has contributed to this (69%).

- A fifth of respondents from Borough say that overall, they spend more time travelling now and a quarter say they spend less whereas around three-quarters of respondents from the West End say they spend about the same time travelling as before.
- There are also significant differences between drivers and non drivers. A quarter of drivers say they are spending less time travelling now, compared to 16% of non drivers. Non drivers are more likely to have seen no difference (69% compared to 55%).
- Respondents from social classes A and B are more likely to spend less time travelling now (29% compared to 16% of C1 and C2s).

Figure 7.1: CCZ: Time spent travelling

Considering all the journeys in London as a whole you have made since the scheme was introduced in February this year, do you think you spend more, less or about the same time travelling overall?



- The groups most likely to say that congestion charging has contributed to the change in the time they spend travelling are CCZ drivers (76%), workers (79%) and those aged 35-54 (81%).

An example of a reason given by a respondent for spending less time travelling is shown below:

The roads are quieter, so journeys are relatively quicker.

Borough, AB, 35-54, Male, Working, Driver

7.2. Time spent travelling: Expectation compared with experience

Prior to the introduction of congestion charging, the majority of respondents living in the CCZ (76%) said that they expected to spend the same amount of time travelling. Half now say that this is the case, but 9% say they now spend more time travelling while 14% spend less time (see Table 7.2).

While 8% of CCZ respondents thought they would be spending more time travelling, only 3% were correct in their prediction, but a further quarter actually spend less time now.

Only 5% who anticipated a shorter journey time have seen that happen, 4% spending more time travelling now, who expected shorter journeys.

In a small number of cases, respondents have changed their response due to a change in their personal circumstances. The most common reasons given are a change in job (10 respondents) and changes in health (3 respondents).

Table 7.2. CCZ: Time spent travelling, expectation compared with experience

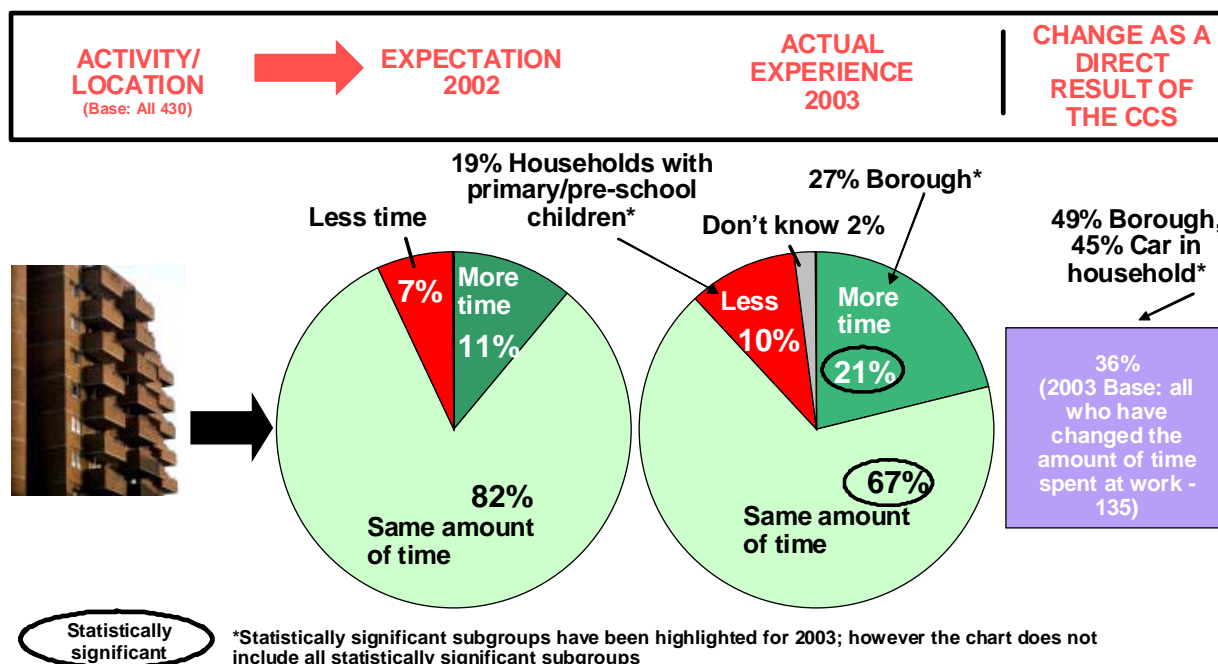
	Less time (70)	Same (325)	More time (35)	Total (430)
	%	%	%	%
Less time (90)	5	14	2	21
Same (266)	8	51	3	62
More time (67)	4	9	3	16
Other/Don't know (7)	0	2	0	2
Total (430)	16	76	8	100

Source: MORI

7.3. Time spent at home

The chart below highlights that a higher than anticipated proportion of CCZ respondents have now changed the amount of time they spend at home. One in five (compared to one in ten who anticipated doing so in 2002) now spend more time at home, in line with findings in Chapter 5, where respondents report meeting-up or attending social gatherings less often now. Those in households with primary/pre-

Figure 7.2. CCZ: Changes in the amount of time spent at home

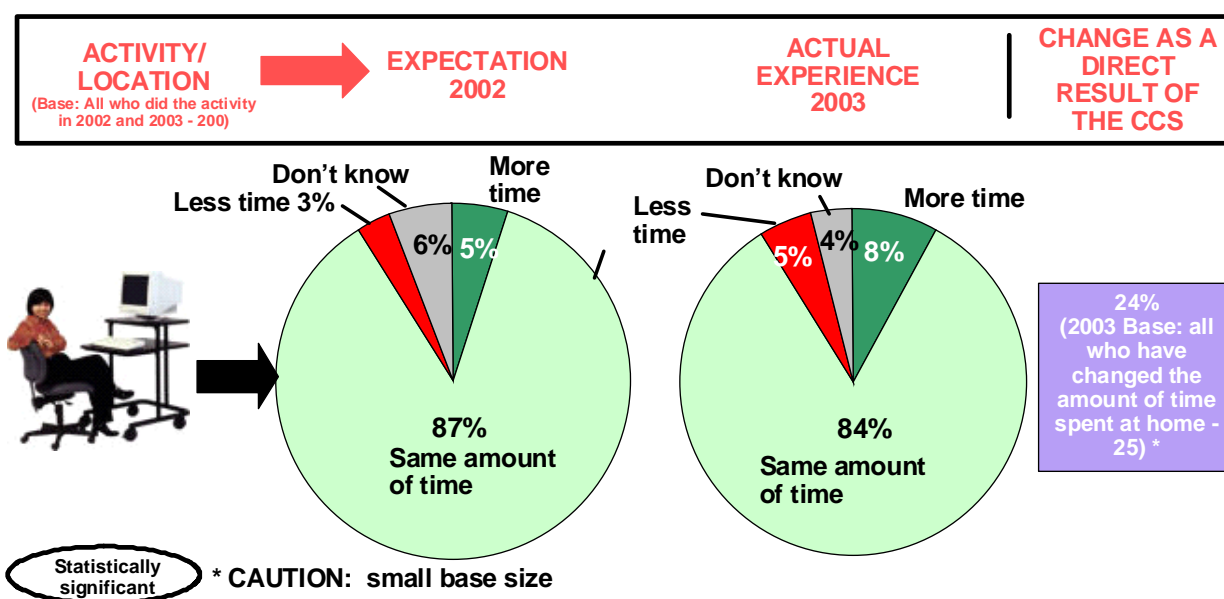


Of those who have experienced any change, 36% say that this occurred as a direct result of the scheme; this is significantly higher amongst those with a car in the household (45%).

7.4. Time spent at work

The following chart highlights that the expectations and actual experience of changes in the amount of time spent at work are very similar. The majority of CCZ respondents (87%) expected to spend the same time at work before the introduction of the scheme and a similar proportion report doing so. Only a quarter of those who experienced any change actually attribute this to the scheme.

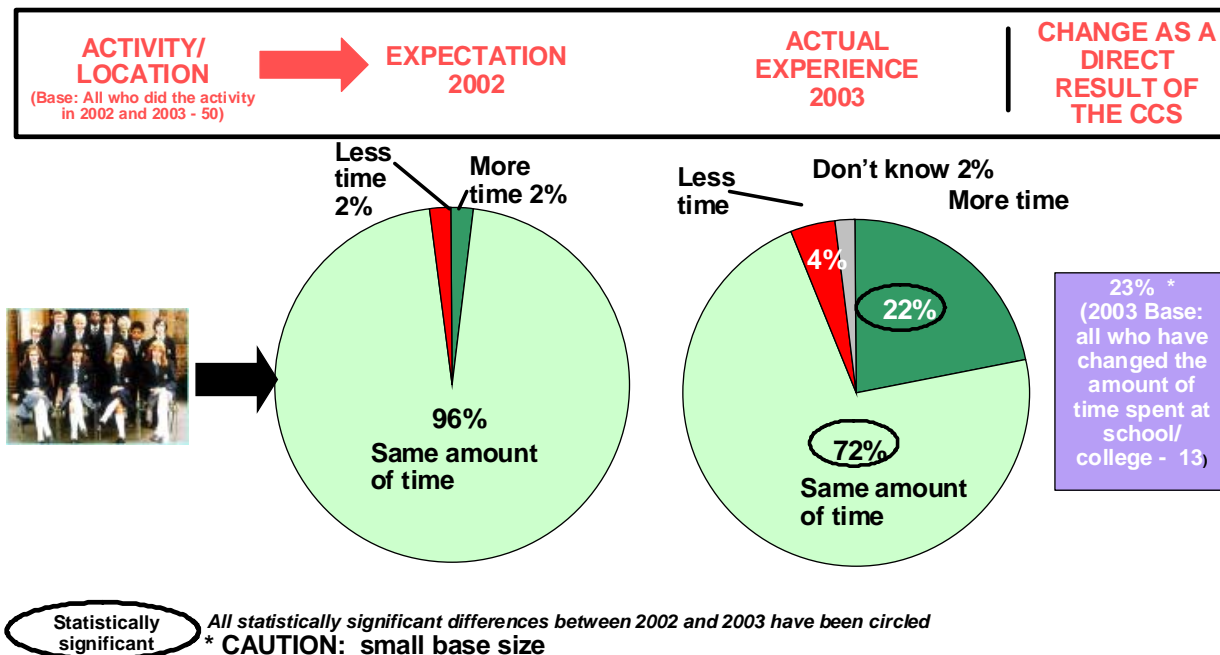
Figure 7.3. CCZ: Changes in the amount of time spent at work



7.5. Time spent at school or college

A significantly lower proportion now say they spend the same amount of time at school or college than expected (72% compared with 96%), with a greater proportion spending more time there (22% compared to 2%). Almost a quarter of those who experienced any change attribute this to the scheme (Figure 7.4.).

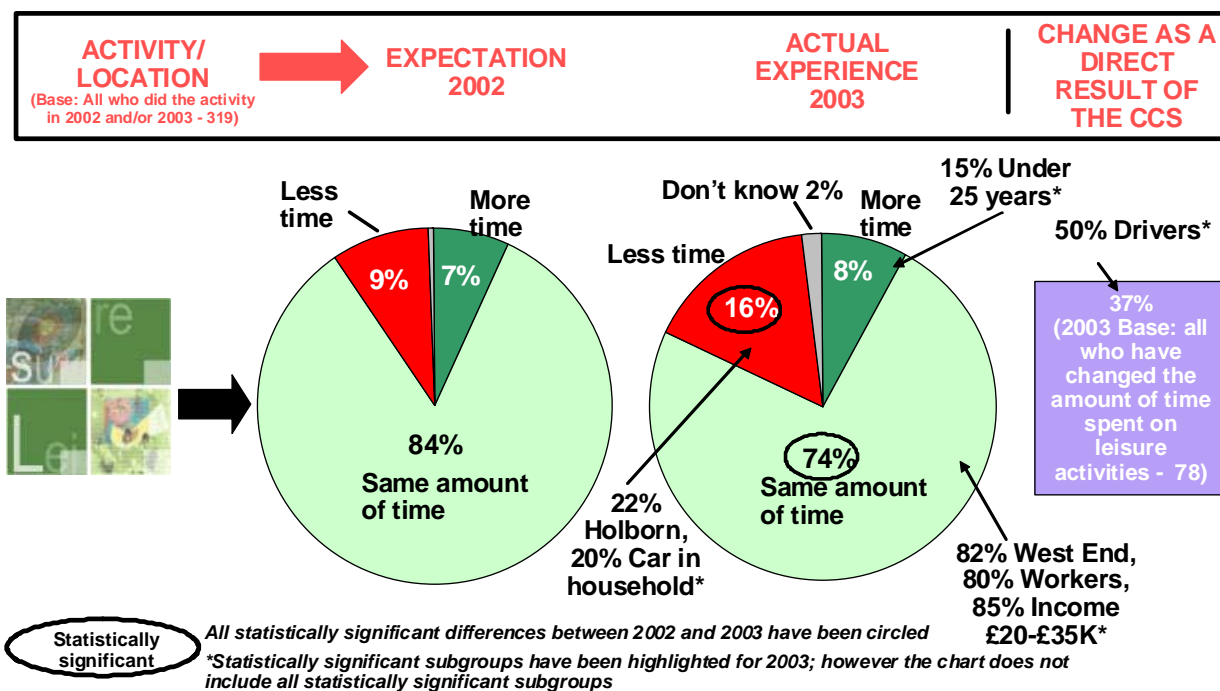
Figure 7.4. CCZ: Changes in the amount of time spent at school/college



7.6. Time spent on leisure activities

Significantly fewer CCZ respondents now spend the same amount of time on leisure activities as previously expected, with more spending less time. Car owning households and those in Holborn are significantly more likely to spend less time on leisure activities. Around a third of those who experienced any change in leisure activities attribute this to the scheme, and this increases to 50% amongst drivers.

Figure 7.5. CCZ: Changes in the amount of time spent on leisure activities



7.7. Inner London - time spent travelling

Around two-thirds of Inner London respondents say that overall, they spend the same time travelling now as they did before the introduction of the charge (see Figure 7.6). Of the remainder, slightly more Inner London respondents spend more rather than less time travelling now than before the introduction of the charging scheme, in line with expectations (Table 7.3).

Table 7.3. Inner London: Travel time, expectation compared with experience

Considering all the journeys (you make do you think you will be spending more or less time travelling?) in London as a whole you have made since the scheme was introduced in February this year, do you think you spend more, less or about the same time travelling overall?

And do you think you spend more, less or about the same time travelling for each trip now than before the scheme was introduced?

Inner London	Overall			Each trip
	Expectation 2002	Experience 2003	Change +/-	Experience 2003
<i>Base: All respondents</i>	(678) %	(678) %	%	(678) %
Less time travelling now	12	15	+3	15
Same	71	64	-7	65
More time travelling now	17	19	+2	17
Other / DK	*	2	+2	3

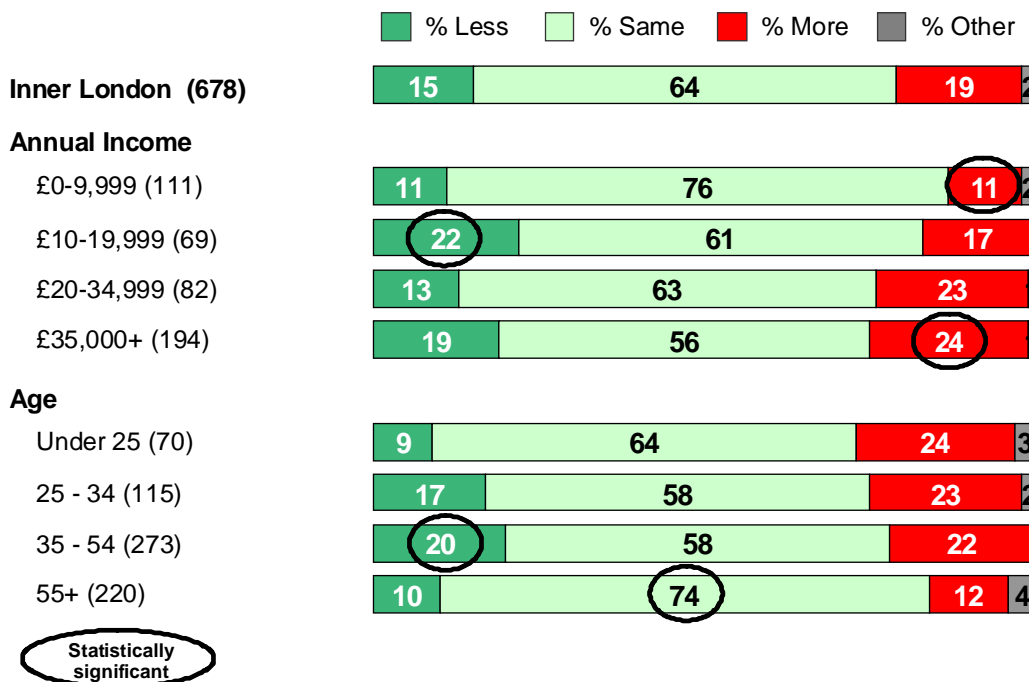
Source: MORI

Of those who have changed the amount of time they spend travelling, around six in ten say that the congestion charge has contributed towards this.

- Respondents from across Inner London are experiencing similar levels of change with regards to time spent travelling overall, with no one neighbourhood differing significantly from another (Figure 7.6).
- A quarter of the higher income households (over £35,000+) say they are spending more time overall travelling now, significantly higher than the proportion of respondents from low income households (less than £10,000 per year).
- Respondents aged 55+ are the most likely to say they are spending the same amount of time travelling overall now, whereas those aged between 35-54 are more likely to say they are spending less time on journeys than others.
- The groups most likely to say that congestion charging has contributed to the change in the time they spend travelling are CCZ drivers (74%), workers (65%) and respondents from higher income households (70%).

Figure 7.6: Inner London: Time spent travelling

Considering all the journeys in London as a whole you have made since the scheme was introduced in February this year, do you think you spend more, less or about the same time travelling overall?



7.8. Time spent travelling: Expectation compared with experience

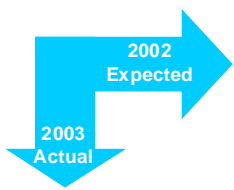
While a minority (17%) anticipated an increase in the amount of time spent travelling only 3% have actually experienced this, with 8% seeing no change and 3% now travel for less time overall (Table 7.4).

A small number of respondents have changed their travelling time due to a change in personal circumstances, the most common of these is a change in work status or job (14 respondents).

For those who expected their journeys to take less time, most have experienced no change with a similar proportion now travel for less as travelling for more time.

Half of Inner London respondents who did not expect their journey to change and this is the reality. Amongst the remaining 23% expecting no change, 10% now having shorter journey times and 12% longer journeys.

Table 7.4. Inner London: Time spent travelling

	Less time (82)	Same (481)	More time (114)	Total (677)
	%	%	%	%
Less time (102)	2	10	3	15
Same (432)	8	48	8	64
More time (132)	2	12	5	20
Other / Don't know (12)	0	1	1	2
Total (678)	12	71	17	100

Source: MORI

7.9. Time spent at home

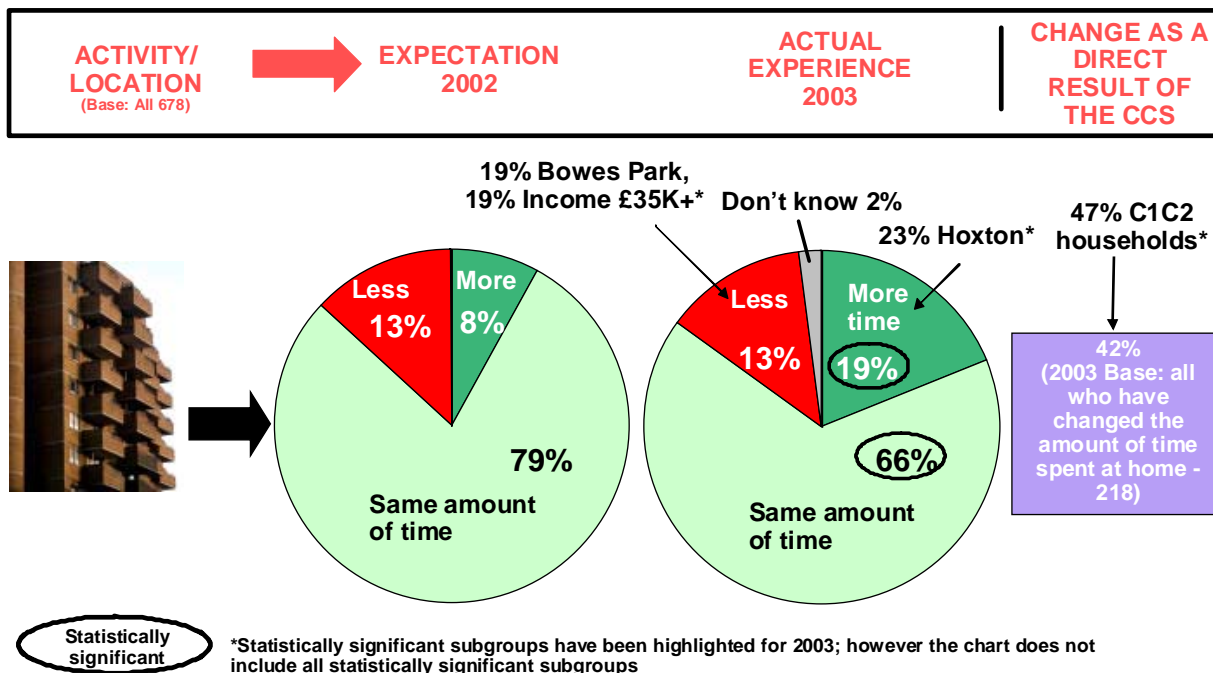
Figure 7.7 shows that a higher than anticipated proportion of Inner London respondents have now changed the amount of time they spend at home.

An increased proportion, one in five (compared to one in twelve who anticipated doing so in 2002) now spend more time at home, particularly in Hoxton;

- Those in Bowes Park and those with a household income in excess of £35,000 are significantly more likely to spend less time in their home (compared to those in the other neighbourhoods and in the lower income bands).

Of those Inner London respondents who have experienced any change, two-fifths say that this occurred as a direct result of the scheme; significantly higher proportions in social class group C1 and C2 households attribute this change to the CCS.

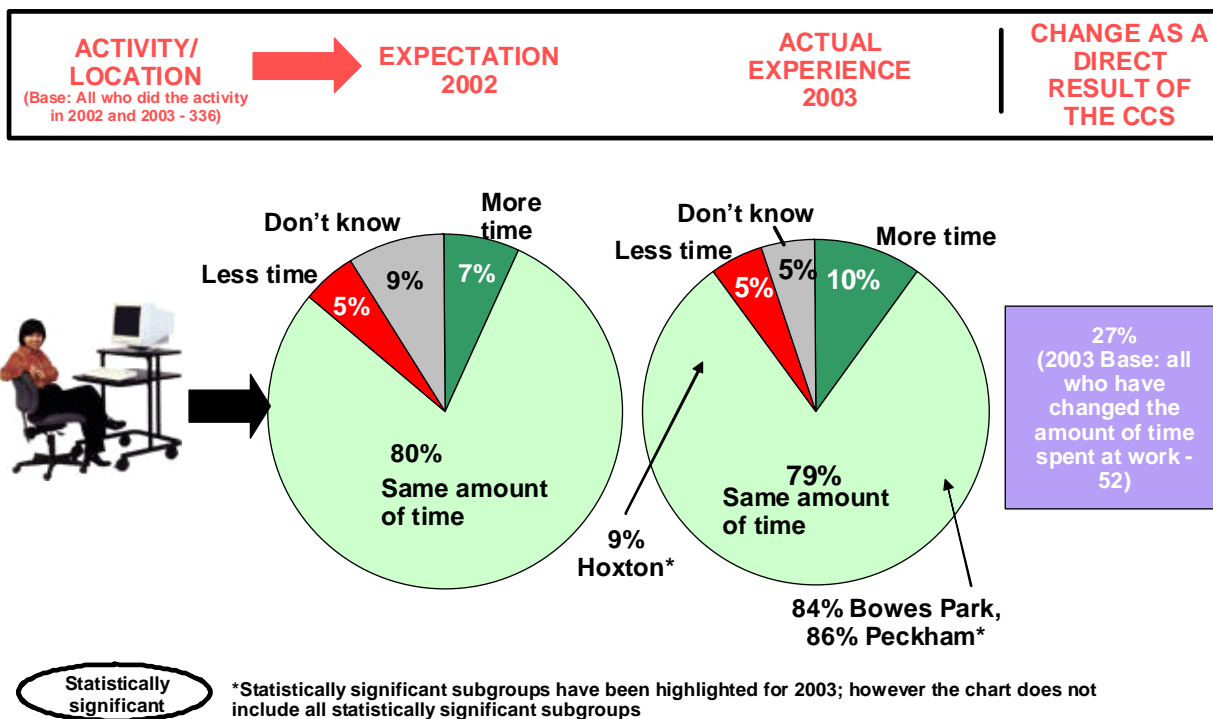
Figure 7.7. Inner London: Changes in the amount of time spent at home



7.10. Time spent at work

The chart below highlights that expectations and actual experience of changes in the amount of time spent at work are very similar. Four-fifths expected to spend the same time at work before the introduction of the scheme and the same proportion report doing so. Only a quarter of those who experienced any change actually attribute this to the scheme.

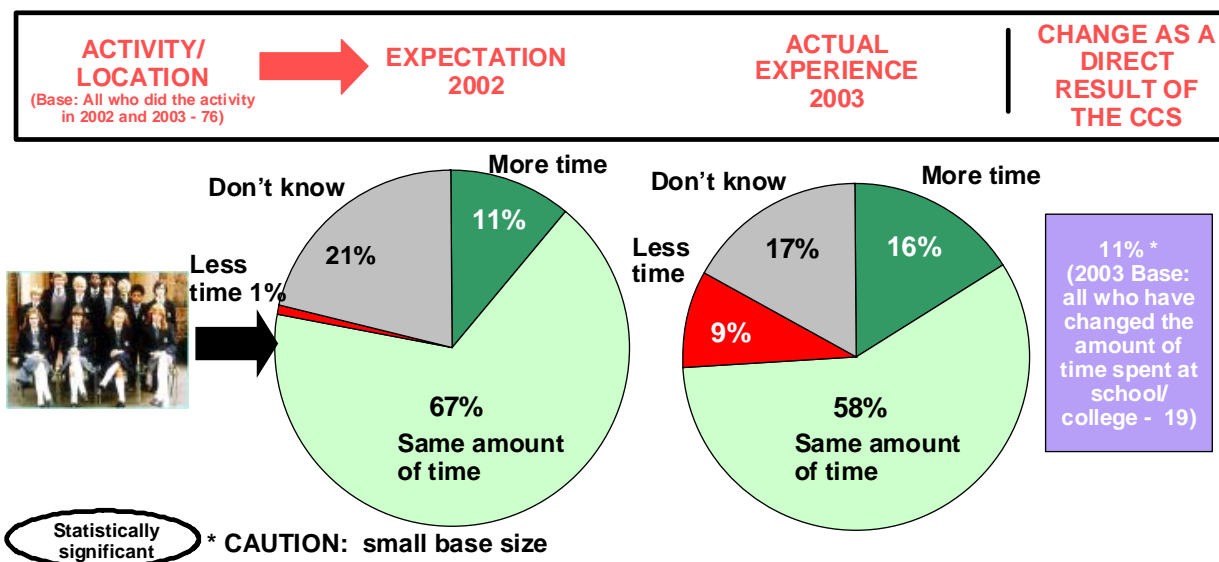
Figure 7.8. Inner London: Changes in the amount of time spent at work



7.11. Time spent at school or college

Figure 7.9. shows that around three-fifths of those in Inner London spend the same amount of time at school or college as before the introduction of the charge. Only 11% of those who experience any change actually attribute this to the scheme.

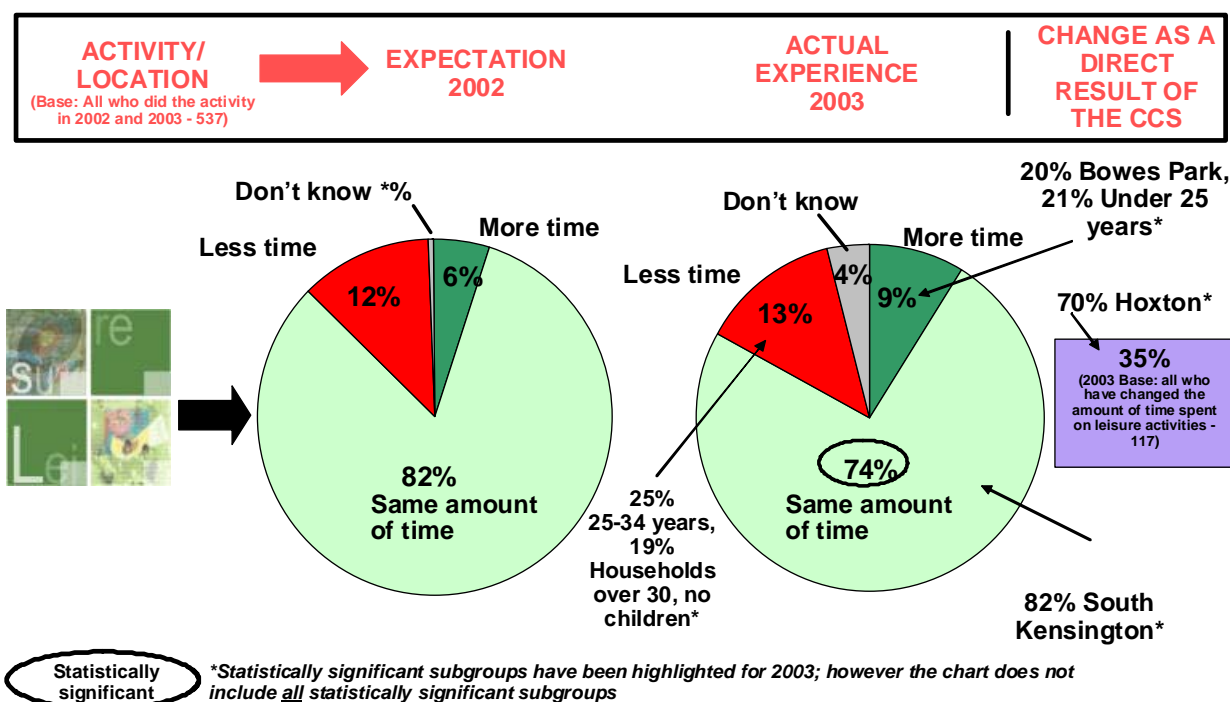
Figure 7.9. Inner London: Changes in the amount of time spent at school/college



7.12. Time spent on leisure activities

Significantly fewer than now say that they spend the same amount of time on leisure activities. Respondents from Bowes Park and those aged under 25 are significantly more likely to say they now spend more time on leisure activities. Around a third of those who experience any change attribute this to the scheme, and this doubles to 70% within the Hoxton neighbourhood.

Figure 7.10. Inner London: Changes in the amount of time spent on leisure activities

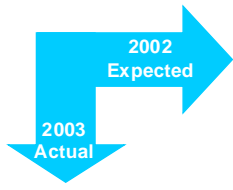


7.13. Outer London and beyond the M25- speed of journeys to and from the congestion charging zone

Respondents from Outer London and beyond the M25 who have travelled into the zone since the scheme was introduced and have seen a change in congestion were asked about the speed of their journeys (of these respondents, 30% are CCZ drivers).

A third of respondents who expected their journeys into the zone to be quicker prior to the introduction of the scheme have actually experienced this. While 27% expected a slower journey, 20% say that in reality this has actually occurred.

Table 7.5. Outer London and beyond the M25: Speed of journeys

	Quicker (15)	Same (262)	Slower (131)	Total (551)
<i>*(Base: All saying there has been a change in congestion)</i>	%	%	%	%
Quicker (184)	14	14	5	33
Same (229)	9	21	11	42
Slower (109)	5	9	6	20
Other / Don't know (29)	1	3	2	5
Total (551)	29	48	24	100

Source: MORI

Respondents from Outer London and those beyond the M25 are almost identical in terms of reporting change in journey times to the charging zone that their journeys are overall quicker since the introduction of the CCS (see Figure 7.11).

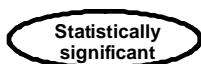
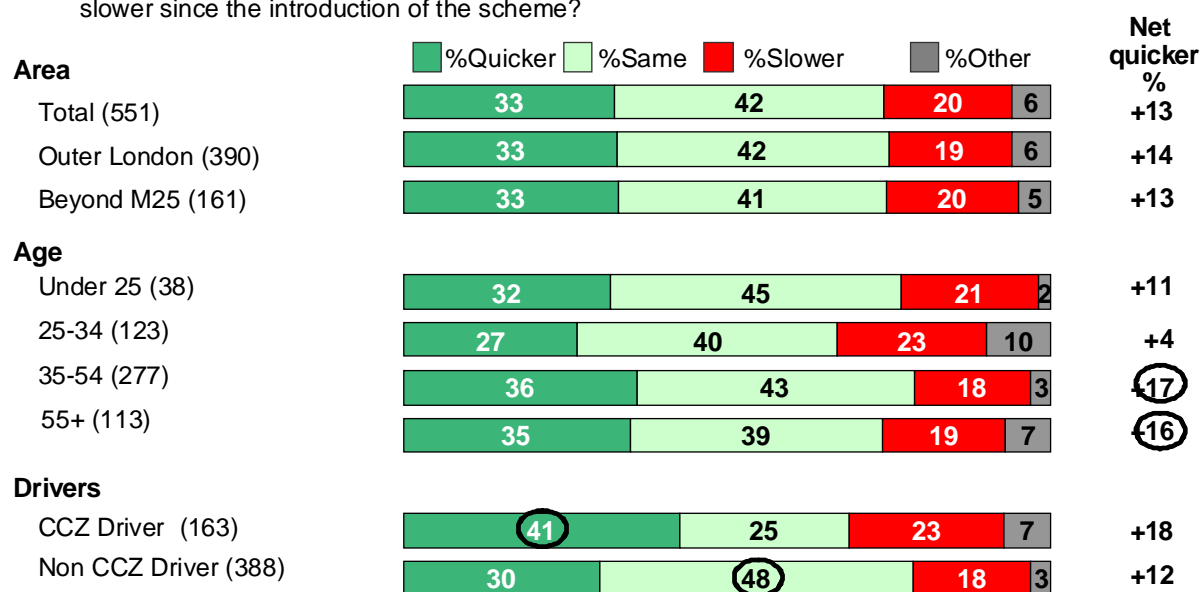
Those most positive about changes in time spent travelling are in the older age groups of 35-54 and 55+, with over a third reporting quicker journeys.

While nearly half of those visiting the zone from Outer London and beyond thought their journey time would remain the same, only 21% believe this is the case with 14% feeling it is quicker and 9% slower. However 11% who thought it would be slower and 9% who thought it would be faster now see no change in their journey times to the zone.

Paradoxically, although a quarter thought their journey times would increase, this has been experienced only by 6%, with 5% noting that it is now faster.

Figure 7.11. Outer London and beyond the M25: Speed of journeys

Generally speaking do you think that your journeys to or from the zone are now quicker or slower since the introduction of the scheme?



Base: All Outer London and beyond the M25 respondents who say there has been a change in time spent travelling

7.14. Changes in time spent at different locations

As in other parts of London, a higher proportion of respondents than expected in Outer London and beyond the M25 say that they now spend more time at home since the introduction of the scheme (9% expected to do so, 17% report actually doing so). Those particularly affected have household incomes below £20k, among whom 29% report spending more time at home since the introduction of the CCS. A quarter of those who report any change say that it is due to the introduction of the scheme.

In 2002, time spent at various locations was asked of all respondents rather than of those who specifically do the activities themselves. Therefore, other than for time spent at home, direct comparisons cannot be made between the 2003 and 2002 data.

However, similar numbers also say they now spend more time at outside locations for recreation, entertainment and leisure (16%).

Three-quarters say that they still spend the same amount of time with friends and family as they did in 2002, with a slightly higher proportion now spending more than less time with friends and family.

Around one in five of those who either work or go to school/college now say that they spend more time at these locations.

8. Impacts of the congestion charging scheme on finances

This section comments on any impacts the congestion charge has had on respondents' finances.

The majority of respondents who continue to drive into and within the zone have paid the charge at some stage, with one in seven being exempt from the charge. Most respondents are finding the charge affordable.

When asked whether their spending has increased or reduced in ways other than travel costs, a diverse range of factors are mentioned by a minority of respondents with around four-fifths (84% in Inner London; 79% in the congestion charging zone (CCZ)) reporting 'no change in spending'.

Congestion charging zone (CCZ) neighbourhoods

CCZ residents who drive in the zone receive a resident's discount (when registered) on the congestion charge and pay £2.50 a week.

Although the majority of CCZ respondents are finding the charge affordable, expectations of a proportion of drivers have been realised with nearly a quarter experiencing difficulty in paying the charge. The vast majority (93%) are paying the charge themselves (or within their household).

A higher proportion of respondents from Borough are experiencing difficulties (37%) while more West End respondents are finding it affordable (83%), reflecting the relative affluence of these areas. Respondents from the DE social classes are four times more likely to be having difficulties with paying the charge than those from the AB social class (42% compared to 11%).

Inner London neighbourhoods

Inner London residents driving into the CCZ are required to pay £5 for each day they drive in the zone.

The majority of respondents who drive into the zone find the charge affordable, and the ease of payment is better than expected. A fifth of drivers have their charge paid by their employer/business.

Three in ten respondents have made five or fewer chargeable trips into the zone since the introduction of the scheme, paying up to £25, while around a quarter have paid in excess of £305, or for over 60 days, at the time of interview.

None of the major sub groups differ significantly from one another in terms of the level of ease or difficulty in paying the charge, with the more affluent having similar views to those on low incomes.

Outer London and beyond the M25

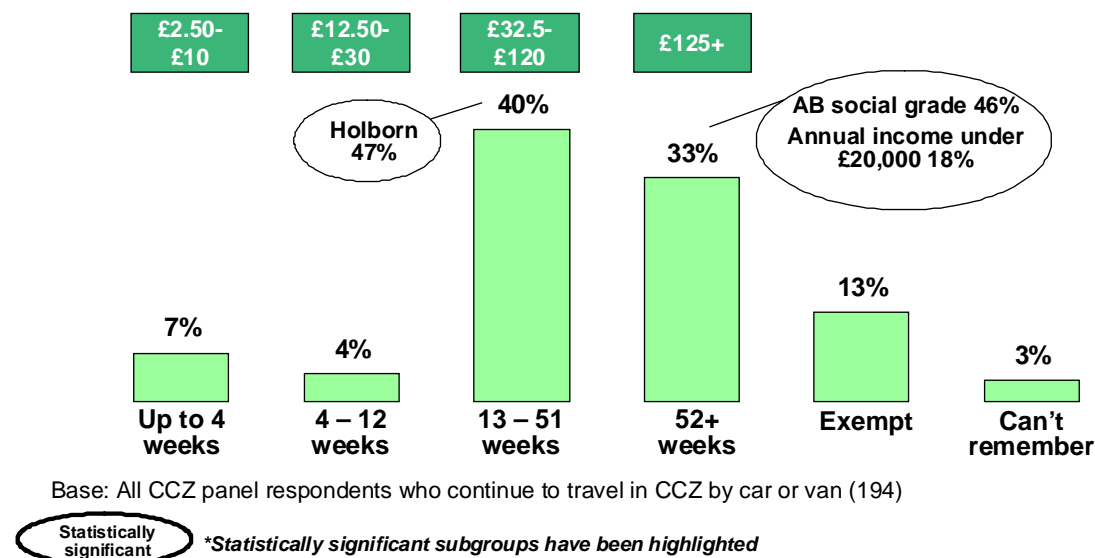
As with Inner London, three in ten respondents from Outer London/ and beyond the M25 have made 5 or fewer chargeable trips into the zone since the introduction of the scheme, and around a quarter at least 52 trips or have paid £265 per year.

In Outer London around three-fifths cover the cost of the charge themselves, while for most of the remainder costs are met by their employer. This is significantly different to those from beyond the M25 where only 48% have to cover the cost of the charge themselves, compared to 53% who have the costs covered by their employer.

8.1. Congestion charging zone - Paying the charge

The majority of CCZ drivers who live in the zone pay the charge regularly, with a third making a single annual payment, and 40% paying the charge for more than three months during the last year.

Figure 8.1. CCZ: Number of days the charge has been paid



The vast majority of respondents (93%) either pay the charge themselves or it is paid by someone else in their household with just 5% treating the charge as a business expense.

8.2. Affordability of the charge

The degree of affordability for CCZ drivers is in line with their expectations a year ago (see Table 8.1). Just under a quarter of CCZ respondents say they are finding the charge difficult to pay, in line with expectations. However, it would seem that the large proportion who were undecided are now finding it affordable.

Table 8.1. CCZ: Ease of meeting the cost of the charge

CCZ	Expectation 2002	Experience 2003	+/-
<i>Base: All respondents answering who are continuing to travel into CCZ by car and have paid congestion charges</i>	(161) %	(161) %	%
Very easy/don't notice it	6	12	+6
Quite easy/affordable	26	53	+27
Possible by cutting costs elsewhere	7	11	+4
Difficult	10	15	+5
Extremely difficult	13	8	-5
Don't know	38	1	-37

Around a quarter of frequent travellers (those paying the charge for more than 12 weeks per year) are finding it difficult to afford the charge, compared to 62% who are not.

A small proportion of respondents in the CCZ neighbourhoods (12%) say it is 'very easy to afford/don't notice it'.

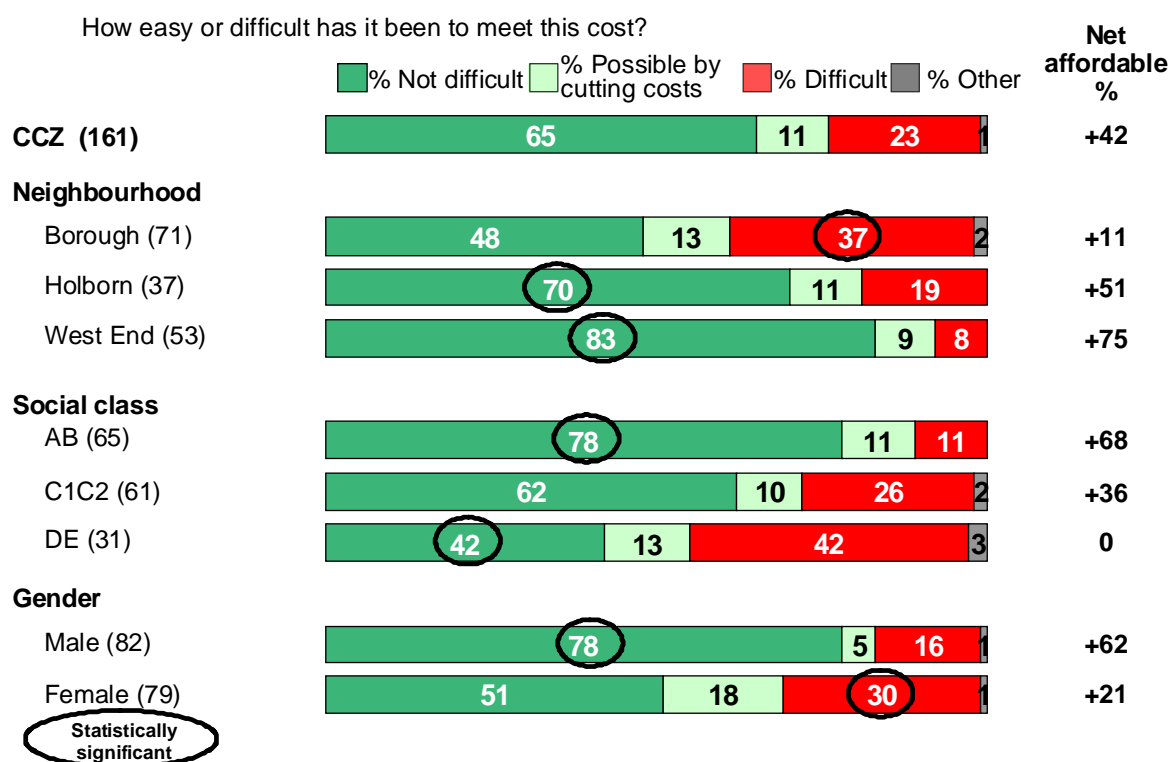
Around one in ten respondents who pay the charge say that the charge is only affordable by cutting costs elsewhere and this is also the case for the majority that are finding it difficult to pay. Few give specific examples, however these include reducing food and other shopping bills, leisure activities, children's outings, luxury items, taxis and bus trips.

Although more respondents from all CCZ neighbourhoods are finding the charge affordable rather than difficult, a larger proportion respondents from Borough are having difficulties while more respondents from the West End are finding it quite easy, reflecting the relative levels of affluence of these two areas (see Figure 8.2).

Women are almost twice as likely as men to say that the charge is difficult to afford.

Respondents in the DE social class are around four times as likely to say they are having difficulties paying the charge as social class AB (42% compared to 11%). This finding is reflected in the income levels of respondents, with those in low income households are significantly more likely to find the charge difficult to pay than higher income households (34% under £20k compared to 6% over £35k).

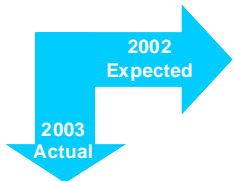
Figure 8.2. CCZ: Affordability of the charge



8.3. Affordability of the charge: Expectation compared with experience

Over six in ten respondents have found it not difficult to meet the cost of the charge, although only 32% thought this would be the case, with a further one in ten having to cut costs elsewhere (Table 8.2). Nearly a quarter say that the charge is difficult to afford, in line with expectation.

Table 8.2. CCZ: Affordability

	Not difficult to afford (52)	Possible by cutting costs (11)	Difficult to afford (37)	Don't know (61)	Total (161)
	%	%	%	%	
Not difficult to afford (104)	28	6	5	26	65
Possible by cutting costs (18)	3	1	4	4	11
Difficult to afford (37)	2	1	14	7	23
Don't know (2)	0	0	0	1	1
Total (161)	32	7	23	38	100

Source: MORI

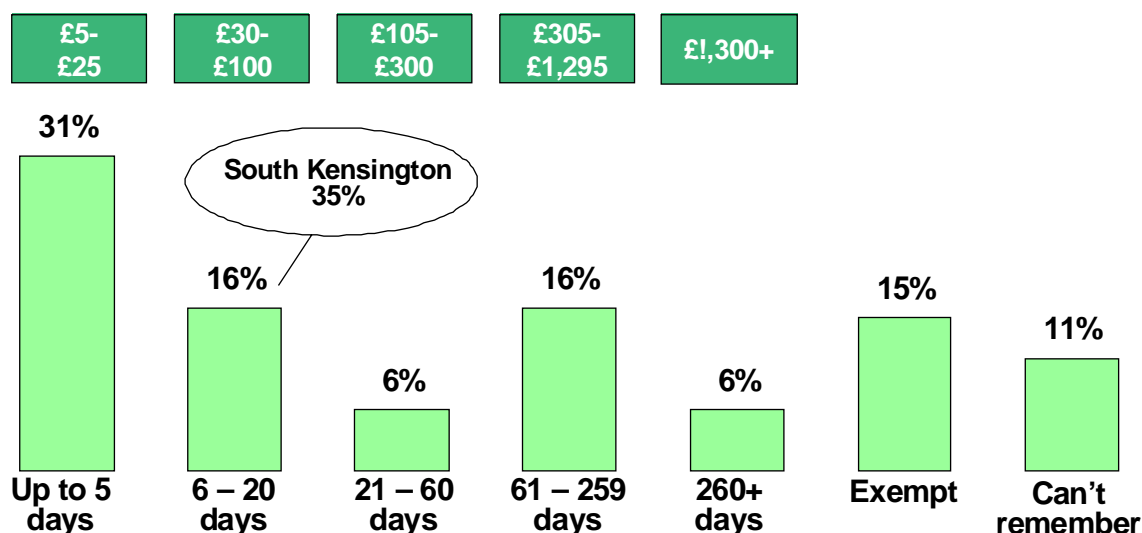
In some cases respondents say that changes in personal circumstances have affected the ability to pay the charge, such as having changed jobs, less household income and additional children to look after.

8.4. Inner London - Paying the charge

Three in ten Inner London respondents who continue to drive into the zone have made five or fewer chargeable trips since the introduction of the scheme, paying £25 or less over the course of a year. At the other end of the scale, 6% pay every day, a total of around £1,300 at the time of interview.

The majority of respondents (78%) either pay the charge themselves or it is paid by someone else in their household. Around a fifth treat the charge as a business expense (18%).

Figure 8.3. Inner London: Number of days the charge has been paid



Base: All Inner London panel respondents who continue to travel in CCZ by car or van (161)

Statistically significant

*Statistically significant subgroups have been highlighted

8.5. Affordability of the charge

Prior to the introduction of the charge most of the Inner London respondents could not say how difficult it would be to pay it. In fact, the majority of respondents who travel into the CCZ have found the charge either 'quite' or 'very' easy to afford (Table 8.3).

However, a small number (17 respondents) say that the charge is affordable only by cutting costs elsewhere and, when prompted, those finding it difficult to pay also say they have had to cut other costs. Although most are not specific in what they have done, six say they have reduced their food spending and three have curtailed their leisure activities or cut back on buying things for their home. Three say that the charge has had an adverse affect on their business.

There is little difference in the levels of affordability between those who pay the charge privately and those who claim it as a business expense, with both groups of respondents believe the charge to be affordable.

Around a quarter of respondents who regularly pay the charge (more than 60 days a year) say they are finding it difficult to afford, however more than twice this proportion are not finding it difficult.⁴

⁴ Caution, small sample sizes. 9 respondents from Inner London have paid the charge on more than 60 days a year and say it to be difficult to afford, 19 say it is not difficult.

Table 8.3 Inner London: Ease of meeting cost of the charge

Inner London	Expectation 2002	Experience 2003	Change +/-	Driver/ household paid	Business expense
<i>Base: All respondents answering who are continuing to travel into CCZ by car and have paid congestion charges</i>	(128) %	(128) %	%	(101) %	(23)* %
Very easy / don't notice it	5	28	+23	25	39
Quite easy/affordable	9	40	+31	44	26
Possible by cutting costs elsewhere	7	13	+6	14	9
Difficult	10	13	+4	12	17
Extremely difficult	7	5	-2	5	4
Don't know	62	2	-60	1	4

Source: MORI

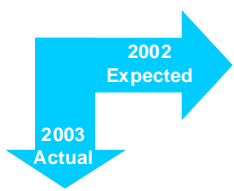
CAUTION: Small base size

8.6. Affordability of the charge: Expectation compared with experience

Three-quarters of those who could not say how difficult it would be to pay the charge are now finding it affordable (Table 8.4).

A third of the group who thought that it would be difficult to meet the cost of the charge are not finding it so, while a quarter are having to cut costs elsewhere in order to pay it, and the remainder are experiencing difficulties in paying the charge. Overall 17% of Inner London respondents who drive into the zone are finding it difficult to afford the congestion charge.

Table 8.4. Inner London: Affordability

	Not difficult to afford (17)	Possible by cutting costs (9)	Difficult to afford (23)	Don't know (79)	Total (128)
	%	%	%	%	%
Not difficult to afford (87)	11	5	6	46	68
Possible by cutting costs (17)	2	2	5	5	13
Difficult to afford (22)	1	1	6	9	17
Don't know (2)	0	0	0	1	1
Total (128)	13	7	18	62	100

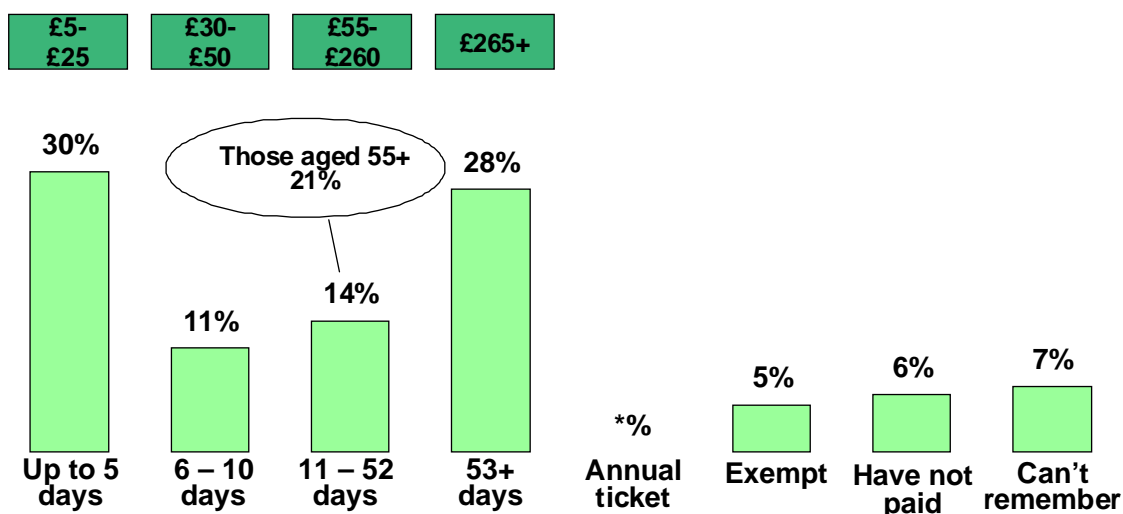
Source: MORI

A small number of respondents whose experience has not matched their expectations comment that this is due to a change in personal circumstances, including making less trips now, having a reduced income and changing to driving a motor bike.

8.7. Outer London and beyond the M25- Paying the charge

As with Inner London, three in ten Outer London/beyond the M25 respondents have made 5 or fewer chargeable trips into the zone since the introduction of the scheme. At the other end of the scale, around a quarter had paid in excess of £265 when they were interviewed. In Outer London around three-fifths cover the cost of the charge themselves, while for most of the remainder the costs are met by their employer. This is significantly different to those from beyond the M25, where only 48% have to cover the cost of the charge themselves, compared to 53% who have the costs covered by their employer.

Figure 8.4. Outer London and beyond the M25: Number of days the charge has been paid



Base: All from Outer London and Beyond the M25 who have driven into the CCZ (280)

Statistically significant

*Statistically significant subgroups have been highlighted

8.8. Affordability of the charge

Significantly more drivers from Outer London and beyond the M25 (135) have paid to drive within the zone than expected to do so (27).

Of those who travel into the CCZ by car and have personally paid any charges, approaching two-thirds say the cost of the charge is 'affordable' (63% - Table 8.5).

Table 8.5. Ease of meeting cost of the charge

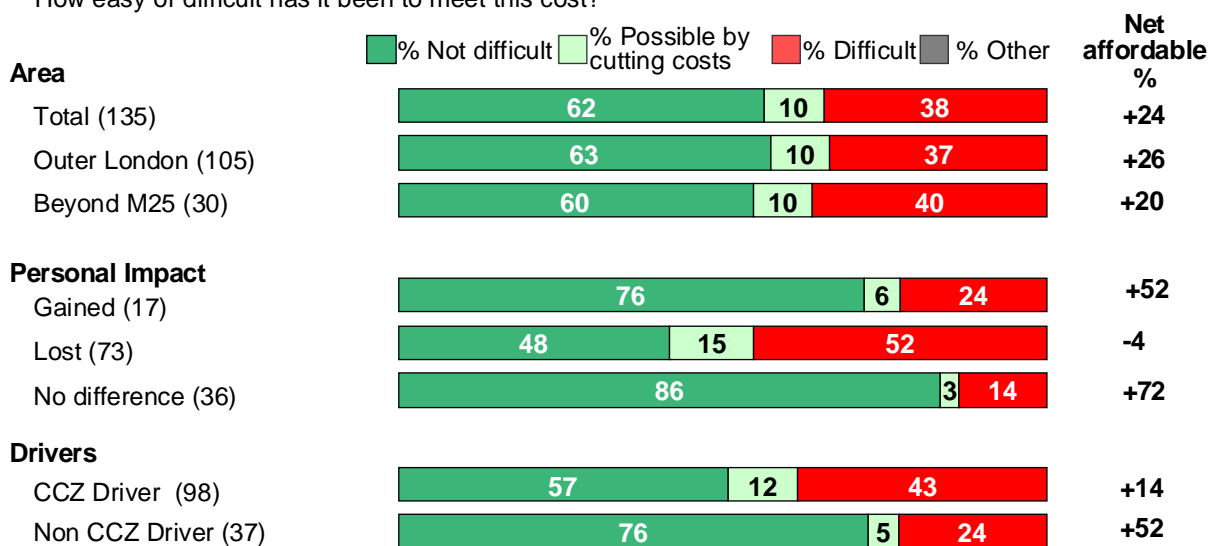
Outer London and beyond the M25	Expectation 2002	Experience 2003		Change +/- (2002/2003)
		Those who expected to pay	Total who paid	
<i>Base: All answering who drive into CCZ and paid congestion charges themselves/household</i>	(27) %	(27) %	(135) %	%
Very easy / don't notice it	15	19	24	+4
Quite easy/affordable	26	26	39	0
Possible by cutting costs elsewhere	4	11	10	+7
Quite Difficult	30	22	19	-8
Very difficult	19	19	9	0
Don't know	7	4	0	-3
Net Easy	-8	+4	+35	+12

Source: MORI

- The majority find the charge affordable, with 57% of CCZ drivers from Outer London and beyond the M25 noting they have no difficulty meeting the cost of the charges (Figure 8.5).

Figure 8.5. Outer London and beyond the M25: Affordability of the charge

How easy or difficult has it been to meet this cost?



Statistically significant

Base: All Outer London and Beyond the M25 respondents who have paid any charges

9. Impacts of congestion charging on selected journey

In 2003, respondents were asked whether they still made the selected journey they described undertaking in 2002, before the congestion charging scheme was introduced. If they did, then further questions were asked to establish whether any aspect of the journey had changed, in terms of mode(s) used, time period in which travelled (inside or outside charging hours) and destination.

A full explanation of how the journey was selected is explained in Chapter 1.

Congestion charging zone (CCZ) neighbourhoods

Expectations of change in travel behaviour with respect to CCZ respondents' selected journey are in line with actual experiences.

Within the CCZ, 17 of the 150 respondents who mainly drove before the scheme now use a different main mode.

Twenty-three respondents who travelled before during charging hours now make their selected activity outside hours, while 10 now make the trip within charging hours rather than outside hours.

Inner London neighbourhoods

Whilst a quarter of Inner London respondents expected to make a change to the mode, time or destination of their selected journey following the charging scheme, a third actually did so.

Within Inner London, of the 160 respondents who mainly drove for their selected journey before the charging scheme was introduced, 41 now use a different main mode, with 15 changing to bus, 10 to underground or DLR, 6 to train, and a further 6 by bicycle or walking, with the remaining 2 to other modes. Those changing mode are more likely to be from with social class AB.

Of all Inner London respondents who travelled into or through the charging zone during charging hours before, the vast majority (332 respondents) still do so for their journey activity with only 36 now travelling outside charging hours. Twenty-two respondents who do not previously make their journey within charging hours, now do so.

Amongst Inner London respondents there has been a noticeable decrease in the proportion of journeys that pass through the zone only (i.e. where origin and final destination are both outside the charging zone).

Outer London and beyond the M25

A quarter of those from Outer London and 29% living beyond the M25 have made changes to their selected journey since charging began.

Much less change has occurred amongst respondents from Outer London and those living beyond the M25. A total of 25 out of 105 Outer London respondents who previously drove, now travel by another main mode, compared with only 3 out of 35 respondents living beyond the M25.

Around six in ten respondents from Outer London and beyond the M25 have not changed their travel for their selected journey in line with expectation.

Generally, there has been little change in the proportion of journeys in which respondents were accompanied by another person or household member.

9.1. Change in vehicle ownership

To enable easy comparison in changes to travel behaviour between respondents living within the zone to those within Inner London, this chapter is structured differently to the rest of the report.

In addition to changes to mode, time of travel and destination, respondents were asked whether they had done a range of things since the introduction of the charging scheme, such as changing to an alternative fuel, purchasing a motorcycle or moped, increasing or decreasing the number of cars or vans in the household and whether they shop online more often, and whether any changes were because of the charging scheme itself. These changes provide further understanding as to the reasons for changing mode, time and destination of selected journeys and are commented on where relevant.

A small proportion of respondents from the CCZ (4%) and Inner London (2%) have decreased the number of cars or vans in their household since the charging scheme, 6 of the 14 respondents in the CCZ and 5 of the 15 respondents in Inner London have done so because of the scheme.

As all two-wheeled vehicles are exempt from the congestion charge, it was thought by some that there might be an increase in the number of people travelling into and within the zone by this mode to avoid the charge. The findings from the survey show that for a very small proportion of respondents this has been the case.

Within the CCZ 3% (11 respondents) have bought or acquired a bicycle, motorcycle, moped or scooter since introduction of the charging scheme. Of these, 7 did so in direct response to the charging scheme.

Within Inner London, 21 respondents have purchased two-wheeled vehicles since the introduction of the charging scheme, with 6 doing so in direct response to the charging scheme.

This compares with 7% of Outer London respondents (with 11 of the 39 saying it is a direct result of the scheme), and 8% of respondents living beyond the M25 (however only one of these respondents said it is because of the scheme).

Examples of comments made by respondents on 2 wheelers:

Because of the congestion scheme – do not have to pay for a motorcycle
Peckham, 25-34, AB, Male, Working, CCZ Driver

Because it is more convenient to have a scooter and I realised I could go into the zone and park for nothing. It is no more expensive.
Bowes Park, Under 25, C1C2, Male, Working, Non CCZ Driver

9.2. Overall change in travel behaviour for selected journey

The majority, 78% of Inner London respondents and 88% of CCZ respondents, say that they have travelled for their selected activity since the charging scheme was introduced.

While most have not changed their selected journey (in terms of destination, mode(s) and time period), Inner London respondents are more likely than those in the CCZ to have made some change to their journey or no longer make the journey at all.

Table 9.1 Overall changes in travel behaviour for selected journey

When we interviewed you a year ago, you described a <SELECTED ACTIVITY>⁵ journey in detail. The journey started from home and ended at <DESTINATION>, travelling by <METHOD>. The journey was made at <TIME>. Have you travelled to <DESTINATION> for <SELECTED ACTIVITY> at <TIME> using <METHOD> since the scheme was introduced in February?

	CCZ	Inner London
<i>Base: All respondents travelling within or in to zone during hours for selected activity in 2002</i>	(422) %	(505) %
Yes - same destination, same time period and same method	69	53
Yes - but have changed in some way (destination, time period, method)	19	25
No - but likely to make the journey in next few months	1	3
No - and not likely to make the journey in next few months	8	13
Not stated	4	7

Source: MORI

The analysis presented in this chapter for the congestion charging zone and Inner London is based on only those respondents who reported travelling into or through the zone for their selected activity during charging hours in 2002 and/or 2003. The following respondents are not included in this analysis:

- 8 CCZ respondents whose journey did not involve travelling in the charging zone during charging hours in both 2002 and 2003.
- 173 Inner London respondents whose journey did not involve going into the charging zone during or outside charging hours in both 2002 and 2003.

⁵ Journey details from the 2002 survey relating to selected activity, destination, main mode and time of travel were provided by the interviewer to ensure that the same journey was referred to by the respondent in 2003.

The main activities of the journeys by respondents contained within this chapter who still travel within or into the charging zone are presented in Table 9.2.

Table 9.2. Selected activity for journeys in 2003

<i>Base: All respondents still travelling within or into zone during hours for the same selected activity in 2003</i>	CCZ	Inner London
	(367) %	(390) %
Commute to/from work	32	34
Escorting children to/from nursery/ school	12	2
To/from school/college	10	4
Business trip	4	8
Visit friends or family	10	12
Food shopping	20	3
Other shopping	5	19
Leisure trip	2	10
Services/facilities (e.g. bank/ hairdresser)	1	2
Health trip (e.g. dentist, doctor)	4	5

Source: MORI

When the 2003 selected activity profile is compared with all respondents in 2002 (i.e. including those who no longer make their selected journey following the introduction of the charging scheme), very little change has occurred. This suggests that no particular selected activity has been affected more than others.

Of those still making a journey for their selected activity in 2003, 21% of CCZ respondents and 32% of those from Inner London have changed their journey in some way following the introduction of the scheme. This is in line with change observed from other congestion charging studies.

Fewer respondents actually made a change to the time at which they made their selected journey than expected. However, expectations of change were exceeded in terms of mode and destination (see Table 9.3).

Table 9.3. Change to selected journey: expectation compared with experience

<i>Base: All respondents travelling within or in to zone during hours for selected activity in 2002 and/or 2003</i>	CCZ (367) %		Inner London (390) %	
	Expected 2002	Experience 2003	Expected 2002	Experience 2003
No change	78	79	75	68
Any change	22	21	25	32
- change in mode *	8	11	9	16
- change in time period*	16	9	17	15
- change in general destination*	1	5	3	6
- change in CCZ destination**	2	9	3	8

Source: MORI

*Figures sum to more than 21%/32% as it is possible for respondents to make more than one type of change.

**Figures rebased on only those whose final destination for selected activity was inside the zone in either 2002 and/or 2003.

In 2002, respondents were asked whether they expected to make a change to their selected journey following the introduction of the charging scheme (Table 9.3). While expected change is broadly in line with actual change amongst respondents in the CCZ (22% expecting some kind of change compared with 21% actually making a change in aggregate), on closer examination it can be seen that a large proportion of those who have changed their travel behaviour for their selected activity had not expected to do so, with an equivalent proportion expecting change but then continued to travel as before (Table 9.3).

The majority of CCZ respondents' expectations of change to their selected journey were realised (68%). However, amongst Inner London respondents, a quarter expected a change while a third actually did so.

Inner London respondents are more likely to have changed their main mode of travel and time period (whether inside or outside of charging hours) than CCZ respondents. Although very few have done so, similar proportions in Inner London and the CCZ have changed the destination to which they travel for their selected activity.

Detailed examination of these changes and the profile of respondents making the changes are discussed later in this chapter.

Table 9.4. CCZ: Any change to selected journey

2002 Expected	Expected to change (79)	Did not expect to change (288)	Total (367)
	%	%	%
Made change (78)	5	16	21
Did not make change (289)	16	62	79
Total (367)	22	78	100

Source: MORI

Of the 59 CCZ respondents who did not expect to make a change but did so following the introduction of the charging scheme, 21 have an average household income below £20,000, and 37 are aged over 35 years.

Two thirds of Inner London respondents' expectations for change to their journey following the introduction of the charging scheme were accurate.

Table 9.5. Inner London: Any change to selected journey

2002 Expected	Expected to change (98)	Did not expect to change (292)	Total (390)
	%	%	%
Made change (124)	11	21	32
Did not make change (266)	14	54	68
Total (390)	25	75	100

Source: MORI

Of the 55 Inner London respondents who expected to make a change but did not, 17 were from Hoxton and 18 from Bowes Park, with 30 aged 35-54, and 20 with an average household income over £35,000.

For the 81 Inner London respondents who did not expect to make a change but did so, 35 were from Peckham, 33 were aged 35-54, and 26 with an average household income over £35,000.

9.3. Changes to main mode used on selected journey

Tables 9.6 and 9.7 compare the main mode used for the selected journey before and after congestion charging, identifying which modes respondents have changed. It is important to note that these matrices are not representative of 'typical' travel behaviour since they are based on a selected activity and since respondents are not representative of the population in London.

Within the CCZ, 17 of the 150 respondents who mainly drove before the scheme now use a different main mode. Of these, the greatest shift has been to bus (7 respondents), with 6 to bicycle or walking.

A similar number of CCZ respondents who previously travelled as car passengers to their selected activity have changed mode (4 trips for Inner London respondent and 3 within the CCZ). Within Inner London, 2 respondents now make their journey by bus, and the others by tube/DLR or train. Amongst CCZ respondents, bus now accounts for all those who have changed from travelling as a car passenger.

Within Inner London, of the 160 respondents who mainly drove for their selected journey before the charging scheme was introduced, 41 now use a different main mode, with 15 changing to bus, 10 to underground or DLR, 6 to train, 6 to bicycle or walking, 2 to other modes, and the remaining 2 as car passengers.

Some examples of respondents who have changed mode are shown below:

It is easier to travel on bus and train and avoid parking and congestion charges.

Peckham, AB, under 25, Male, Not working, CCZ Driver

It's too expensive to go in by car, so I go by bus. I park my car in East Dulwich and go with my son on the bus to Guy's Hospital.

Peckham, C1C2, 25-34, Female, Not working, Non CCZ Driver

Because there is less traffic on the roads due to congestion charging, buses are now reliable and get to their destinations quickly. I prefer the buses as I find the tube very stressful – I do not like being underground!

Peckham, AB, under 25, Female, Working, Non CCZ Driver

Table 9.6. CCZ: Change in main mode used on selected journey following charging scheme

	2003 - Main mode used after charging scheme							
2002 – Main mode used before charging scheme								
(% Mode share before)	Car driver	Car passenger	Bus	Tube/DLR	Train	Walk/cycle	Other	Absolute total
CCZ Car driver (41%)	133	2	7	2	-	6	-	150
CCZ Car passenger (7%)	-	21	3	-	-	-	-	24
Bus (18%)	2	-	55	2	1	6	-	66
Tube/DLR (6%)	-	1	3	18	-	-	-	22
Train (1%)	-	1	-	-	3	-	-	4
Walk/Cycle (26%)	-	1	2	-	-	94	-	97
Other (1%)	-	-	-	1	-	-	3	4
Total (100%)	135	26	70	23	4	106	3	367
(% mode share after)	(37%)	(7%)	(19%)	(6%)	(1%)	(29%)	(1%)	(100%)

Base: All respondents still travelling into or through zone during charging hours for the same selected activity in 2003

Table 9.7. Inner London respondents: Change in main mode used on selected journey following charging scheme

	2003 - Main mode used after charging scheme							
2002 – Main mode used before charging scheme								
(% Mode share before)	Car driver	Car passenger	Bus	Tube/DLR	Train	Walk/cycle	Other	Absolute total
CCZ Car driver (41%)	119	2	15	10	6	6	2	160
CCZ Car passenger (5%)	-	16	2	1	1	-	-	20
Bus (25%)	-	-	92	3	1	-	-	96
Tube/DLR (21%)	2	1	3	71	4	-	-	81
Train (3%)	-	1	-	-	10	-	-	11
Walk/Cycle (3%)	-	-	-	-	-	13	-	13
Other (2%)	-	-	-	-	-	1	8	9
Total (100%)	121	20	112	85	22	20	10	390
(% mode share after)	(31%)	(5%)	(29%)	(22%)	(6%)	(5%)	(3%)	(100%)

Base: All respondents still travelling into or through zone during charging hours for the same selected activity in 2003

9.4. Changes in main mode for different journey purposes

A slightly higher proportion of Inner London respondents than CCZ respondents have changed their main mode of travel for their selected activity (16% compared with 11%, respectively).

Amongst Inner London respondents, the greatest change in mode has been amongst those travelling for business purposes, with 11 of the 32 respondents doing so (Table 9.8). Of the 9 Inner London respondents who no longer travel by car for business purposes on their selected activity, 3 do so now by tube or DLR, 2 by bus and 2 by train.

One-tenth of those commuting have changed their main mode. Amongst the 8 Inner London respondents who no longer commute by car on their selected activity, 4 now do so by tube or DLR, 2 by bus, 1 by train and the other by bicycle. Within the CCZ, the majority of respondents who used to commute by car now do so by bus (5 of the 7 respondents), with the other 2 now walking.

Within Inner London a greater proportion of car drivers have changed main mode than public transport users following the charging scheme (26% compared to 10%, respectively). In contrast, within the CCZ a similar proportion of respondents have changed mode from public transport (11%) as car to another mode of transport (10%).

Car sharing or arranging to park/garage a vehicle outside the charging area have generally not been strategies adopted by CCZ and Inner London respondents since the introduction of the scheme. Only 5 CCZ and 6 Inner London respondents (representing 1% of the sample) have started to car share (although of these 4 and 2 respondents respectively say it is because of the scheme itself). For Inner London respondents, only 10 respondents (2%) say they now arrange to park or garage their vehicles outside the charging area did, of these 4 say it is because of the scheme.

Table 9.8. Change in main mode by journey purpose for selected journey

<i>All answering who still travel within or into zone during hours for the same selected activity in 2003 (n)</i>	CCZ			Inner London		
	Car*	Other**	Base	Car*	Other **	Base
Commute to/from work	7	7	117	8	7	134
Escorting children to/from nursery/school	4	1	44	2	-	9
To/from school/college	-	4	36	1	2	15
Business trip	1	1	16	9	2	32
Visit friends or family	2	4	37	4	1	47
Food shopping	2	3	73	2	1	12
Other shopping	-	-	18	6	4	75
Leisure trip	-	-	9	5	2	40
Services/facilities (e.g. bank/hairdresser)	-	-	2	3	-	6
Health trip (e.g. dentist, doctor)	1	3	15	1	2	20
All activities	17	23	367	41	21	390
All respondents	150	217	367	160	230	390

Source: MORI

*Number of respondents changing from car driver as main mode to another main mode for their selected activity.

**Number of respondents changing from other main modes (excluding car driver) to another main mode for their selected activity.

The following table shows the number of respondents within each subgroup who have changed their main mode of transport on their selected journey following the introduction of the charging scheme.

Table 9.9. Number of respondents who have changed main mode on selected journey within each subgroup

	CCZ			Inner London		
	Car*	Other**	Base	Car*	Other**	Base
<i>Base: All answering who still travel within or into zone during hours for the same selected activity in 2003 (n)</i>						
Gender						
Male	8	15	178	18	12	172
Female	9	8	189	23	9	218
Age						
Under 25	0	9	49	0	4	32
25-34	5	5	52	7	9	81
35-54	6	4	156	24	5	167
55+	6	5	110	10	3	110
Social Class						
AB	5	3	107	20	8	160
C1C2	5	5	146	15	10	150
DE	3	12	101	4	3	63
Annual Household Income						
Under £19,999	6	8	115	5	2	87
£20,000-£34,999	3	4	61	5	5	49
£35,000+	2	4	86	17	7	123
Frequency of travel for selected journey						
At least weekly	14	17	312	18	11	199
At least monthly	15	19	334	31	16	298
Less often	1	3	17	8	4	85
Household type						
30 and under no children	1	1	20	4	0	22
Over 30 no children	3	5	105	8	6	104
Primary/pre-school children	7	6	77	12	7	89
Secondary school children	2	7	92	12	6	98
Retired	4	4	73	5	2	77
All respondents	150	217	367	160	230	390

Source: MORI

*Number of respondents changing from car driver as main mode to another main mode for their selected activity.

**Number of respondents changing from other main modes (excluding car driver) to another main mode for their selected activity.

- Within Inner London respondents who changed mode (whether from car or public transport to other modes) are more likely to be male, those aged 25-34, social class AB, household incomes over £20,000 and those with primary/pre-school children.
- There are no major differences by frequency of travel for selected journey.
- CCZ respondents who changed mode (whether from car or public transport to other modes) are more likely to be male, those aged under 35, social class DE, lower income households (less than £20,000), infrequent travellers and those with primary/pre-school children.

More affluent respondents from Inner London have a higher incidence of changing mode for their selected journey, with the change being most likely from car to public transport. Conversely, those living in the zone undertaking modal change are more likely to be from lower income households, changing from one form of public transport to another.

9.5. Changes to frequency of selected journey

Generally, there has been little change in the frequency of selected activities amongst Inner London or CCZ respondents. However, amongst Inner London respondents, there has been a slight decrease in frequency with a fifth now doing their selected activity less often than once a month compared with 16% before the scheme was introduced.

Table 9.10. Change in frequency of selected journey for all purposes

	CCZ		Inner London	
	2002 (350) %	2003 (350) %	2002 (366) %	2003 (366) %
<i>Base: All answering who still travel within or into zone during hours for the same selected activity in 2003</i>				
5 days a week	53	49	31	30
3-4 days a week	15	11	11	6
1-2 days a week	25	29	16	17
Less than 1 day per week to 1 day per month	5	6	26	24
At least weekly	92	89	59	53
At least monthly	97	95	85	77
Less often	3	5	16	22

Source: MORI

Table 9.11. Change in frequency of visiting family & friends on selected journey

	CCZ		Inner London	
	2002	2003	2002	2003
<i>Base: All answering who still travel within or into zone during hours for the same selected activity in 2003</i>	(33) %	(38) %	(33) %	(38) %
5 days a week	24	9	11	8
3-4 days a week	21	6	13	3
1-2 days a week	39	67	18	21
Less than 1 day per week to 1 day per month	9	9	47	42
At least weekly	85	82	42	32
At least monthly	94	91	89	74
Less often	6	9	11	26

Source: MORI

While the frequency of undertaking selected activities overall do not differ greatly from those done prior to the scheme, respondents visiting family and friends as the main purpose of their selected journey are making such trips less frequently following the introduction of the charging scheme.

9.6. Journey stages

The number of stages in a journey reflects the 'complexity' of that journey in terms of the number of different modes and linked journey purposes. Thus it would be expected to see an increase in the number of stages on a given journey when an individual changes from car to public transport.

There has been no change in the average number of stages in the outbound journey to selected activity (i.e. from home to selected activity) made by all respondents who travelled into or through the charging zone during charging hours, either in Inner London or the CCZ (Table 9.12).

Table 9.12. Change in average number of stages per journey to selected activity (all modes)

	CCZ		Inner London	
	2002 (367) %	2003 (367) %	2002 (390) %	2003 (390) %
<i>Base: All respondents who still travel within or into zone during hours for the same selected activity in 2003</i>				
Commute to/from work	1.3	1.3	1.6	1.7
Escorting children to/from nursery/school	1.3	1.1	2.0	1.2
To/from school/college	1.4	1.7	1.7	1.8
Business trip	1.4	1.6	1.9	1.8
Visit friends or family	1.3	1.5	1.4	1.4
Food shopping	1.2	1.2	1.2	1.4
Other shopping	1.4	1.2	1.5	1.7
Leisure trip	1.3	1.1	1.5	1.7
Services/facilities (e.g. bank/hairdresser)	1.0	1.0	1.0	1.3
Health trip (e.g. dentist, doctor)	1.1	1.2	1.5	1.5
All activities	1.3	1.3	1.6	1.7

Source: MORI

For respondents changing from car to another main mode, the average number of stages has increased following the charging scheme in both Inner London and the CCZ (from 1.2 to 2.1 stages, and 1.1 to 1.4 stages, respectively). In contrast, the average number of stages amongst non-car users who have change mode has stayed the same at 2.0 stages in Inner London and fallen slightly from 1.5 to 1.4 in the CCZ (please note figures are based on small sample sizes).

9.7. Journey accompaniment

Generally, there has been little change in the proportion of journeys in which respondents were accompanied by another person or household member.

Table 9.13. Whether accompanied by another person or household member on any stage of journey to selected activity

	CCZ		Inner London	
	2002 (367) %	2003 (367) %	2002 (390) %	2003 (390) %
<i>Base: All respondents who still travel within or into zone during hours for the same selected activity in 2003</i>				
Accompanied	47	43	41	43
Not accompanied	53	57	59	57

Source: MORI

Amongst Inner London respondents who have changed mode on their selected journey, there has been a fall in the proportion who were accompanied by another person following the introduction of the charging scheme (from 44% to 37%). In contrast, an increase in accompaniment has occurred amongst CCZ respondents (from 45% to 50%).

For Inner London respondents who have changed from car as main mode to another mode, 34% are accompanied now compared with 41% before the charging scheme was introduced (based on a small sample size).

9.8. Changes to time of journey

A higher proportion of Inner London respondents have changed the time of their journey (i.e. from previously travelling inside charging hours to outside, or vice versa) than CCZ respondents (15% compared with 9%, respectively).

Of all Inner London respondents who travelled into or through the charging zone during charging hours before the scheme was implemented, the vast majority (85%) still do so for their selected journey, with 8% now travelling outside charging hours, suggesting some impact of the charging scheme on travel times among these respondents. Twenty two respondents who previously made their journey outside charging hours, now do so within these times. In the CCZ, even fewer respondents now make their selected activity outside hours (6%).

- Within Inner London, respondents who now travel outside charging hours for their journey are more likely to be drivers, females, those aged over 55, those from social class AB, or retired people. There is no direct relationship with household income.

- A different pattern emerges amongst CCZ respondents with males, those aged over 35, social class C1C2, and respondents from lower income households now travelling outside of charging hours. There is less pronounced difference in the number of drivers and public transport users travelling outside charging hours compared with in Inner London.

Table 9.14. Number of respondents who now travel outside charging hours for their selected journey within each subgroup

	CCZ			Inner London		
	Car driver*	Other**	Base	Car driver*	Other**	Base
<i>Base: All answering who still travel within or in to zone during hours for the same selected activity in 2003 (n)</i>						
Gender						
Male	9	4	178	7	7	172
Female	4	6	189	6	16	218
Age						
Under 25	1	2	49	-	4	32
25-34	2	2	52	3	1	81
35-54	5	3	156	5	8	167
55+	5	3	110	5	10	110
Social Class						
AB	3	3	107	6	11	160
C1C2	7	4	146	5	6	150
DE	3	3	101	2	6	63
Annual Household Income						
Under £19,999	6	3	115	2	9	87
£20,000-£34,999	2	-	61	2	-	49
£35,000+	2	4	86	5	6	123
Household type						
30 and under no children	1	2	20	-	-	22
Over 30 no children	5	3	105	4	3	104
Primary/pre-school children	1	1	77	2	2	89
Secondary school children	2	2	92	2	9	98
Retired	4	2	73	5	9	77
All respondents	150	217	367	160	230	390

Source: MORI

*Number of respondents now travelling outside charging hours who drove car as main mode on selected journey.

** Number of respondents now travelling outside charging hours who travelled by other main modes (excluding car driver) on selected journey.

Examples of how some journeys have been affected are given below:

To avoid the cost of the scheme I chose to withdraw from visiting these places at the congestion charging hours – if I do go it will be absolutely necessary.

Borough, AB, 35-54, Female, Not working, Driver

It is cheaper for me to travel in the evening to see a relative or friend when I don't have to pay for the charge. Or I might go at the weekend it depends.

Borough, C1C2, Under 25, Male, Not working, Driver

Rescheduling shopping trips rather than going immediately - we put it off until the weekend.

Peckham, AB, 35-54, Male, Working, CCZ Driver

So I do not have to pay the congestion charge I leave later in the evening to miss the charge when I visit friends. We car-share at work to keep costs down. I use the bus if I do not have to carry any (sport) equipment around.

Peckham, AB, Under 25, Female, Working, CCZ Driver

9.9. Changes to final destination

Only 5% of Inner London respondents making the same selected journey following the introduction of the charging scheme have changed their final destination (whether from inside the zone previously to outside now, or vice versa). This is very similar to CCZ respondents (6%).

Some reasons given by respondents for changing their destinations include:

I always forget to pay the congestion charge. I am too scared to go into London now in case I am fined – either by a traffic warden, or forget to register the charge.

Peckham, AB, 25-34, Male, Working, CCZ Driver

Of the 322 Inner London respondents whose journey destination was inside the zone previously, 24 now travel to a destination outside the charging zone. Within the CCZ, 13 of the 206 respondents whose final destination was inside the charging zone, now travel to a destination outside the zone for the same activity.

Very few respondents who previously travelled to a destination outside the charging zone now travel to a destination within the charging zone (1 in Inner London and 6 in the CCZ).

Approximately one in ten respondents (varying from 7% of CCZ respondents to 15% of Outer London respondents) say they have changed their workplace, occupation or job since the introduction of the scheme.

11 of the 58 Inner London respondents who have changed (19%) say it is because of the scheme, compared with 14% (12 of 85 respondents) in Outer London and 13% (4 of 32) living beyond the M25. The vast majority of CCZ respondents who have changed have not done so because of the scheme (97%).

Amongst Inner London respondents there has been a noticeable decrease in the proportion of journeys that pass through the zone only (i.e. where final destinations are outside the charging zone).

Table 9.15. Proportion travelling through zone only for selected activity

	CCZ		Inner London	
	2002	2003	2002	2003
<i>Base: All respondents who still travel within or into zone during hours for the same selected activity in 2003</i>	(367) %	(367) %	(390) %	(390) %
Through zone only	44	46	17	4

Source: MORI

9.10. Respondents who have not made their selected journey since February 2003

Overall, 16% of Inner London respondents and 10% of CCZ respondents had not made their selected journey since the introduction of the congestion charge. Only a small number of these respondents are likely to make the journey within the next few months, 6 from the CCZ and 16 from Inner London.

The most common selected journeys to be made in the coming months by those who have not yet done so are to visit family and friends and to make leisure and non food shopping trips. Before congestion charging most of these respondents used the bus for these activities, although one in three drove.

- Respondents in this group are more likely to be female, aged 55 or over, in the lower income bracket (household income under £20,000 per annum) and living in either Hoxton or Peckham.

A total of 100 respondents (35 from the CCZ and 65 from the Inner London) said they would be unlikely, if at all, to make a journey for their selected activity in the next few months.

The most common activity of this group before the introduction of the charge was commuting, with the numbers split fairly evenly between the CCZ and Inner London. Leisure and business trips also feature for Inner London respondents.

- Almost half of these journeys were made by drivers.

- Respondents who are unlikely to make the journey are more likely to be aged 35 or over, in the lower income bracket and to be frequent travellers into the zone (65% travel at least once a week).

Of those who no longer make their journey, the vast majority (80%) say that this is not as a direct result of the charging scheme. The most common reason cited was a change in personal circumstances, such as changing job, retiring, or changing/finishing college or school.

9.11. Outer London and beyond the M25

Respondents from Outer London and beyond the M25 in 2002 were asked to recall a journey they made into central London which was during charging hours for a specific purpose. In 2003, respondents were asked whether they still made this selected journey.

- The analysis presented in this chapter is based on only those respondents who still travel into or through the charging zone (whether during or outside hours) for their selected activity in 2003. It excludes the following respondents:
- Those no longer making their selected journey following introduction of the charging scheme, 49 Outer London and 28 beyond the M25 respondents (these are commented on in chapter 10)

Table 9.16 below shows that 85% of Outer London respondents and 83% of those living beyond the M25 have travelled into the zone during charging hours for their selected activity since the charging scheme was introduced. A slightly higher proportion of selected journeys have changed amongst those living beyond the M25 compared with those living in Outer London (17% and 13%, respectively), but levels of change being much lower than for respondents from Inner London and the CCZ.

One quarter of Outer London respondents have made a change to their selected journey following the introduction of the charging scheme. This rises to almost a third of respondents living beyond the M25 (see Table 9.17).

Most of the observed change is a result of respondents changing the main mode on their journey, with the majority of this change has been amongst public transport users rather than car drivers.

Table 9.16. Whether travelled into the charging zone during charging hours for the selected activity in 2003

	Outer London	Beyond M25
<i>Base: All respondents travelling in to or through zone during hours for selected activity in 2002</i>	(551) %	(226) %
Yes - still doing activity to zone and during hours	85	83
Yes - still doing activity to zone but outside hours	3	3
No - but may do so during hours	5	5
No - but may do so outside hours	1	1
No - but have done activity outside charging zone	3	2
No - and do not plan to inside or outside charging zone	3	6

Source: MORI

Table 9.17. Outer London and Beyond the M25, change to selected journey

	Outer London	Beyond M25
<i>Base: All respondents travelling in to or through zone during hours for selected activity in 2002 and/or 2003*</i>	(502) %	(198) %
No change	76	69
Any change	24	31
- change in CCZ destination	3	3
- change in method	17	26
- change in time period	4	3

Source: MORI

* Figures include the 17 Outer London respondents and 5 respondents living beyond the M25 who still make their journey but not into the charging zone.

As observed amongst CCZ and Inner London respondents, around two thirds of Outer London respondents' expectations for change to their journey following the introduction of the charging scheme were accurate. A fifth of respondents who did not expect to make a change to their journey, actually did so following the introduction of the charging scheme (Table 9.18).

Of the 84 respondents who expected to make a change in 2002, 56 travelled mainly by public transport compared with 28 who drove.

Table 9.18. Outer London: Any change to selected journey

	Expected to change (84)	Did not expect to change (418)	Total (502)
	%	%	%
Made change (119)	6	18	24
Did not make change (383)	11	65	76
Total (502)	17	83	100

Source: MORI

The majority (60%) of respondents from beyond the M25 were accurate in terms of their expectations for change (Table 9.19), though not to the same extent as respondents from the other areas within London. Almost one third who did not expect to make a change to their journey, did make a change. Of the 32 respondents who expected to make a change, 20 were those travelling mainly by public transport compared with 12 who drove.

Table 9.19. Beyond M25: Any change to selected journey

	Expected to change (32)	Did not expect to change (166)	Total (198)
	%	%	%
Made change (62)	4	28	31
Did not make change (136)	13	56	69
Total (198)	16	84	100

Source: MORI

Of those who still travel into the zone during charging hours for their selected activity, the main activities of the journeys are presented in the table below.

Table 9.20. Selected Activity for Journeys made in 2003

	Outer London	Beyond M25
<i>Base: All respondents travelling in to or through zone for selected activity in 2003</i>	(485) %	(193) %
Commute to/from work	66	54
To/from school/college	5	3
Business trip	12	28
Visit friends or family	2	1
Shopping (food and non-food)	6	4
Leisure trip	5	7
Services/facilities (e.g. bank/ hairdresser)	0	1
Health trip (e.g. dentist, doctor)	1	1
Other reasons	2	2

Source: MORI

There is very little difference in the profile of selected activities for all 777 respondents, showing that there is no real difference in the activities that are not done now.

9.12. Changes to main mode used on journey

The majority of respondents who have changed main mode in both Outer London (89 respondents) and beyond the M25 (53 respondents) have changed from public transport to another form of public transport (46 and 37 respondents, respectively), (see Table 9.21).

Of the 112 Outer London respondents who previously mainly drove into the charging zone during charging hours for their selected journey, 26 now travel by another main mode (23%). This is comparable with the proportion of change observed amongst Inner London respondents (26%). A total of 10 Outer London respondents have changed to tube/DLR and 9 to train, with the remaining to other main modes.

Thirty-seven of 203 Outer London respondents (18%) who previously travelled by train as main mode on their journey have changed to another main mode – predominantly to tube/DLR (24 respondents) and to bus (7 respondents).

Much less change has occurred amongst respondents living beyond the M25. Only 3 of 35 respondents who previously drove have changed to public transport as main mode, with 10 respondents now driving into the charging zone who travelled before by public transport.

Eighteen per cent of those commuting on their selected journey have changed main mode compared with 25% of those visiting family and friends.

Table 9.21. Change in main mode by journey purpose for Selected Journey

	CCZ			Inner London		
	Car*	Other*	Base	Car*	Other**	Base
<i>Base: All answering who still travel within or into zone during hours for the same selected activity in 2003 (n)</i>						
Commute to/from work	15	35	322	2	25	104
Escorting children to/from nursery/school	-	-	-	-	-	-
To/from school/college	2	3	25	-	2	5
Business trip	5	7	60	1	12	55
Visit friends or family	-	2	12	-	1	2
Shopping	1	6	27	-	2	8
Leisure trip	-	5	25	-	5	13
Services/facilities (e.g. bank/hairdresser)	-	1	1	-	1	1
Health trip (e.g. dentist, doctor)	2	2	5	-	1	2
Other	1	2	8	-	1	3
All activities	26	63	485	3	50	193
All respondents inc. not changed	112	373		35	158	

Source: MORI

*Number of respondents changing from car driver as main mode to another main mode for their selected activity.

**Number of respondents changing from other main modes (excluding car driver) to another main mode for their selected activity.

The profiles of those living in Outer London and beyond the M25 who have changed mode (whether from car to public transport to other modes) are shown in Table 9.22.

Table 9.22. Number of respondents who have changed main mode on selected journey within each subgroup

	Outer London			Beyond the M25		
	Car*	Other**	Base	Car*	Other**	Base
<i>Base: All answering who travel in to or through zone for selected activity in 2003 (n)</i>						
Gender						
Male	22	44	329	3	36	138
Female	4	19	156	-	14	55
Age						
Under 25	4	6	38		1	8
25-34	4	15	116	1	11	37
35-54	14	27	245	1	26	109
55+	4	15	86	1	12	39
Annual Household Income						
Under £19,999	1	8	43	1	4	12
£20,000-£34,999	7	14	109	-	6	29
£35,000+	17	37	283	1	39	142
Frequency of travel for selected journey						
At least weekly	16	42	312	3	33	199
At least monthly	19	51	334	-	41	298
Less often	7	12	17	-	9	85
Household type						
30 and under no children	4	12	80	1	6	20
Over 30 no children	14	24	228	2	27	88
Primary/pre-school children	5	10	93	-	8	42
Secondary school children	2	10	63	-	6	34
Retired	-	3	11	-	-	5

Source: MORI

*Number of respondents changing from car driver as main mode to another main mode for their selected activity.

**Number of respondents changing from other main modes (excluding car driver) to another main mode for their selected activity.

Sharing a car with others into the charging zone or arranging to park/garage a vehicle outside the charging area are strategies employed by a minority of respondents from Outer London and beyond the M25 in direct response to the scheme.

A total of 14% of Outer London respondents now share a car into the zone, and of these, a third do so in direct response to the scheme. The proportion is similar beyond the M25 (12%), though in this case only 19% say it is because of the scheme.

Just under 10% of Outer London and beyond M25 respondents now park outside the zone and continue their journey by public transport, with the vast majority, 81% (39 of 48 Outer London respondents) and 76% (13 of 17 beyond the M25) doing so because of the charging scheme.

9.13. Changes to frequency of journey

In both Outer London and beyond the M25, fewer respondents are travelling at least weekly for their journey following the introduction of the charging scheme.

Table 9.23. Change In Frequency Of Selected Journey

	Outer London		Beyond M25	
	2002	2003	2002	2003
<i>Base: All answering who travel in to or through zone for selected activity in 2003</i>	(485) %	(485) %	(193) %	(193) %
At least weekly	89	78	77	68
At least monthly	94	87	90	88
Less often	6	13	9	12

Source: MORI

Amongst Outer London respondents there has been a fall in the proportion who commute at least weekly (from 99% before to 89%). A similar fall is observed amongst respondents living beyond the M25 (from 99% to 91%). Ten respondents who previously commuted on their journey, now say they work from home or use teleworking as a direct result of the charging scheme, with a further 5 respondents whose journey was for business, now working at home or telework.

As with Inner London and the CCZ, there has been very little change in the average number of stages in the outbound journey to selected activity (i.e. from home to selected activity) made by all respondents who travelled into or through the charging zone during charging hours, either in Outer London or beyond the M25 (2.0 to 2.1 stages in Outer London, and 2.3 to 2.4 stages beyond the M25).

The average number of stages per journey amongst Outer London respondents who have changed from car as main mode has increased from 1.3 to 2.2 stages. For those who have changed from public transport to another mode, the average number of stages has remained largely similar (2.0 to 2.2 stages now).

9.14. Journey accompaniment

Generally, there has been little change in the proportion of journeys in which respondents are accompanied by another person (Table 9.24). A much lower proportion of respondents are accompanied on their journey compared with those living in the CCZ and Inner London. This may be largely explained by the high proportion of commuting journeys included in the individual (telephone) survey sample (63% compared with 33% in the household survey).

Table 9.24. Whether accompanied by another person or household member on any stage of journey to selected activity

	Outer London		Beyond M25	
	2002	2003	2002	2003
<i>Base: All answering who travel in to or through zone for selected activity in 2003</i>	(485) %	(485) %	(193) %	(193) %
Accompanied	18	20	22	25
Not accompanied	82	80	78	75

Source: MORI

9.15. Changes to time of journey

Only 17 of 485 Outer London respondents (4%) now make their journey outside congestion charging hours, comparable with 6 of 193 respondents living beyond the M25 (3%).

Of these 17 Outer London respondents 12 are male, 9 aged over 55 years, and 10 from households with average annual incomes over £35,000.

There were no distinct subgroups amongst respondents living beyond the M25.

9.16. Changes to final destination

In 2003, only 17 of 502 respondents from Outer London and 5 of 198 from beyond the M25 reported having made their selected journey but to a destination outside the charging zone (equating to 3% of all respondents).

Although relatively uncommon amongst CCZ and Inner London respondents (1% and 3%, respectively), sizeable proportions of respondents from Outer London and beyond the M25 say they have worked from home since the introduction of the scheme (13% and 15% respectively). Of these Outer London and beyond the M25 respondents who now do this, a fifth say it is directly in response to the charging scheme.

9.17. Respondents who have not made selected journey since introduction of the charging scheme

A total of 49 Outer London respondents no longer make their selected journey (9%). Of these 30 may do so (with 25 likely to make the journey during charging hours and 5 outside hours), but 19 do not plan to do so.

Subgroups most likely no longer travel into the charging zone for their selected activity are males (13 respondents), those from households with average incomes over £35,000 and those living in 'over 30 no children' households.

Twenty eight respondents from beyond the M25 (12%) no longer make their selected journey, and of these 14 have no plans to do so. These respondents are most likely to comprise those from households with incomes over £35,000.

10. Impacts of congestion on travel experience for selected journey

In 2003, respondents were asked how various aspects of their selected journey have been affected by the congestion charging scheme (CCS), such as whether crowding has increased or decreased or if their journey has become more or less predictable. Similar questions were asked in 2002 allowing the comparison of expected and actual change.

Data presented in this chapter is based on only those respondents who reported travelling into or through the charging zone for their selected activity during charging hours in 2002 and/or 2003.

Respondents in both Inner London and the congestion charging zone (CCZ) are generally more positive when talking about their journey experiences on their individual selected journey compared with travelling overall.

Respondents who travel infrequently into the zone for any activity are significantly less likely to say that their overall travel experience has deteriorated.

Congestion charging zone (CCZ) neighbourhoods

CCZ respondents are more likely than Inner London respondents to feel that congestion, public transport options and overall travel experience on their selected journey have improved.

For every aspect of quality of travel on their selected journey, a higher proportion of CCZ respondents say that each has improved rather than got worse since the introduction of the scheme. This contrasts with Inner London where more respondents say comfort, safety, stress and crowding have got worse than better.

A higher proportion of CCZ respondents than Inner London respondents feel that each quality aspect on their selected journey has improved since the charging scheme. For both, predictability is the aspect that has improved the most.

Within the CCZ, a third of respondents who drove say they spend less time travelling for their selected activity now compared to before the introduction of the charge.

When considering the impact of changes in journey time for their selected journey, 22% say that they have saved time on a similar journey. The most common ways of using this time is to 'relax more' or to 'spend more leisure time at home, work or college'. Few have reorganised their day or routine due to their shorter journey time. For those who have lost time (12%), the most common impact is additional 'stress, tiredness or hassle'.

Inner London neighbourhoods

Inner London respondents are generally more positive when describing their experiences on their selected journey than when talking about their experiences of congestion charging overall.

Within Inner London, respondents from the Peckham neighbourhood are more likely to say that congestion has eased and public transport options have improved on their selected journey. Respondents from the Bowes Park neighbourhood are more likely to say the reverse.

Inner London respondents are more positive about their specific experience than when considering travel in general, in line with findings elsewhere in the report.

Amongst Inner London respondents, there are no significant differences by neighbourhood or by those who did and those that did not drive for their journey.

When considering the impact of changes in journey time for their selected journey, 24% from Inner London say that they have saved time on a similar journey. For those who have lost time (16%) 'stress, tiredness or hassle' remain the most common impact.

Outer London and beyond the M25

Amongst Outer London respondents there has been a perceived net improvement in the amount of time spent travelling, with 18% saying they spend less time travelling now compared with 14% who say the journey now takes longer.

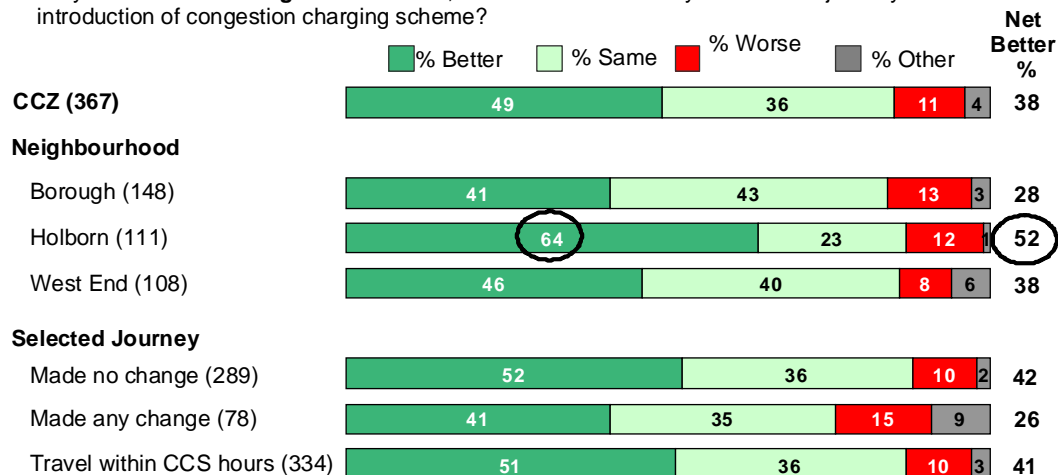
In contrast to respondents in the CCZ, Inner and Outer London, there has been a perceived net increase in the amount of time spent travelling on the selected journey amongst those living beyond the M25 (21% say more and 19% say less).

10.1. Congestion charging zone - traffic congestion

Almost half of CCZ respondents feel that traffic congestion on their selected journey has improved since the introduction of the charging scheme, echoing previous findings (Chapter 3).

Figure 10.1. CCZ: Traffic congestion on selected journey

Do you think **traffic congestion** is better, worse or the same on your selected journey since the introduction of congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003

MORI

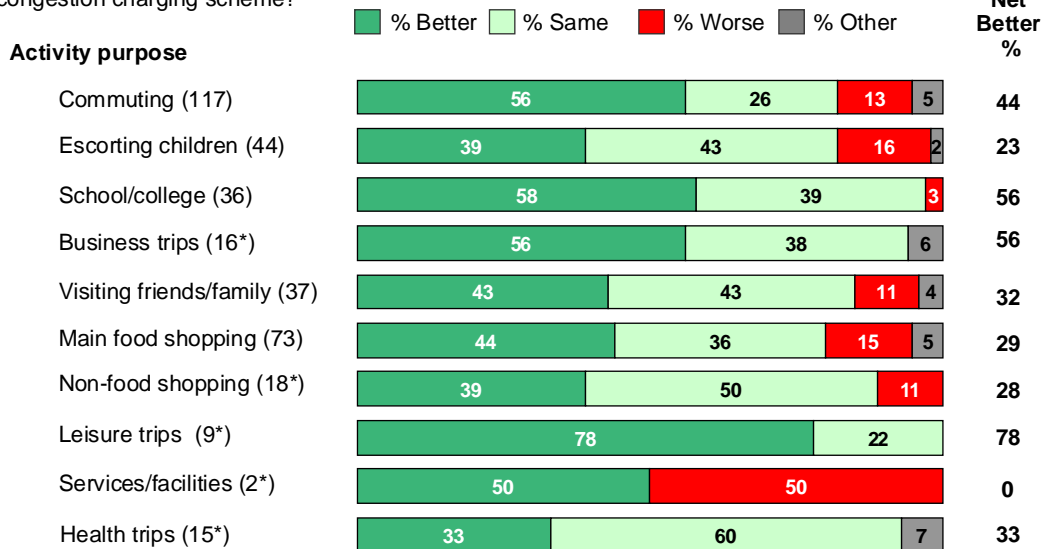
- Respondents from Holborn are more likely to feel that congestion has eased on their selected journey.
- BME respondents are significantly less likely to say that congestion has eased on their selected journey (53% compared with 38%).
- Respondents from higher income households are significantly more likely to say that congestion has improved rather than worsened than those from lower income households. Women respondents are twice as likely as men to believe that congestion is now worse (15% compared to 8%).
- A significantly higher proportion of respondents from car-owning households feel that traffic congestion is now worse on their selected journey compared with those from households without cars (14% and 6% respectively).
- There are no significant differences in opinion by frequency of travel for selected journey.

More than a half of those commuting for their selected activity, making school/college or business journeys feel that traffic congestion has eased, and while two-fifths of those visiting family and friends or main food shopping have noticed an improvement (see Figure 10.2).

Of the 181 CCZ respondents who say that congestion has eased, a quarter had not expected this. Of the minority who feel traffic congestion has worsened on their journey (41 respondents), only 12% expected this.

Figure 10.2. CCZ: Traffic congestion on selected journey by purpose

Do you think **traffic congestion** is better, worse or the same on your selected journey since the introduction of congestion charging scheme?



Statistically significant

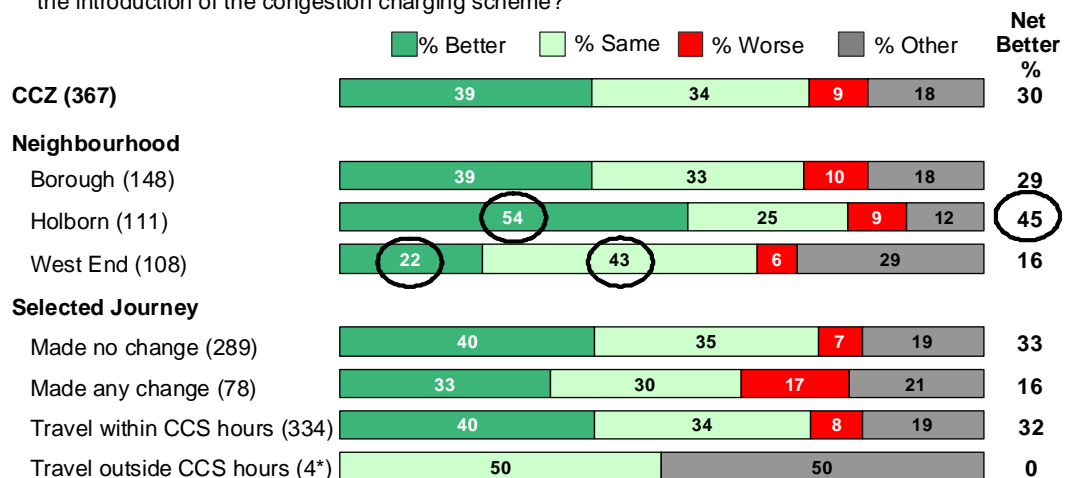
Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *CAUTION: Small base size. MORI

10.2. Public transport options

Within the CCZ, 39% of respondents report that public transport options on their selected journey have improved (Figure 10.3.). This supports the findings at a more general level, where access and reliability of public transport overall has noticeably improved amongst CCZ respondents.

Figure 10.3. CCZ: Public transport options on selected journey

Do you think the **public transport options** are better, worse or the same on your selected journey since the introduction of the congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *CAUTION: Small base size. MORI

- Respondents from Holborn neighbourhood are more likely to say public transport options have improved on their selected journey, while those from the West End are least likely.
- Respondents aged 55 and over are more likely than 25-54 year olds to say that public transport has improved.

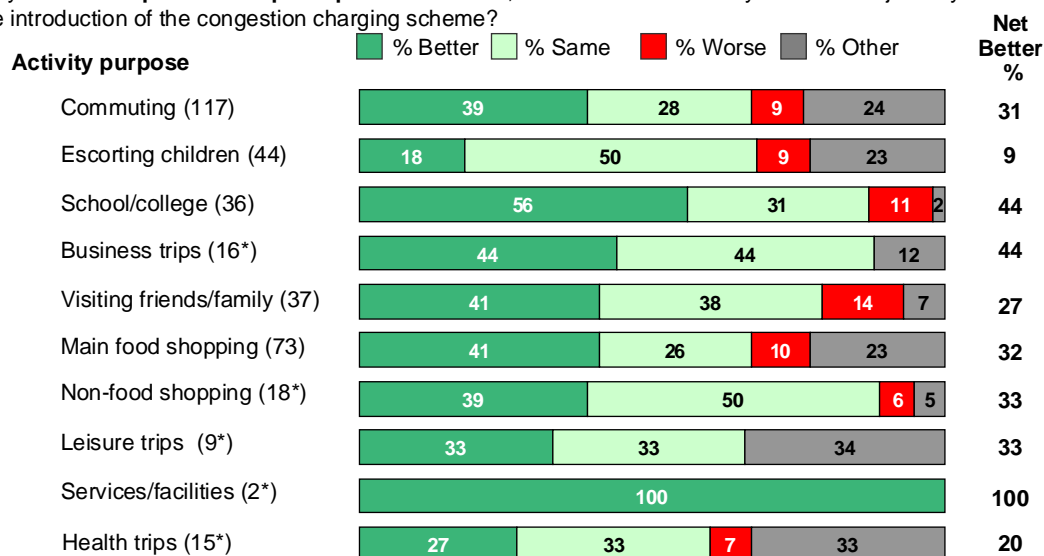
A similar pattern of views emerged amongst CCZ respondents towards how public transport options have changed on their selected journey as with levels of congestion, with one quarter not expecting the improvement they noticed (based on 142 respondents who say public transport options have improved).

Amongst the minority of CCZ respondents who say public transport options have worsened on their selected journey (32 respondents), 41% expected this but 34% did not.

Two-fifths of respondents commuting, visiting family and friends and shopping say that the public transport options on their selected journey are better since the introduction of the charging scheme.

Figure 10.4. CCZ: Public transport options on selected journey by purpose

Do you think the **public transport options** are better, worse or the same on your selected journey since the introduction of the congestion charging scheme?



Statistically significant

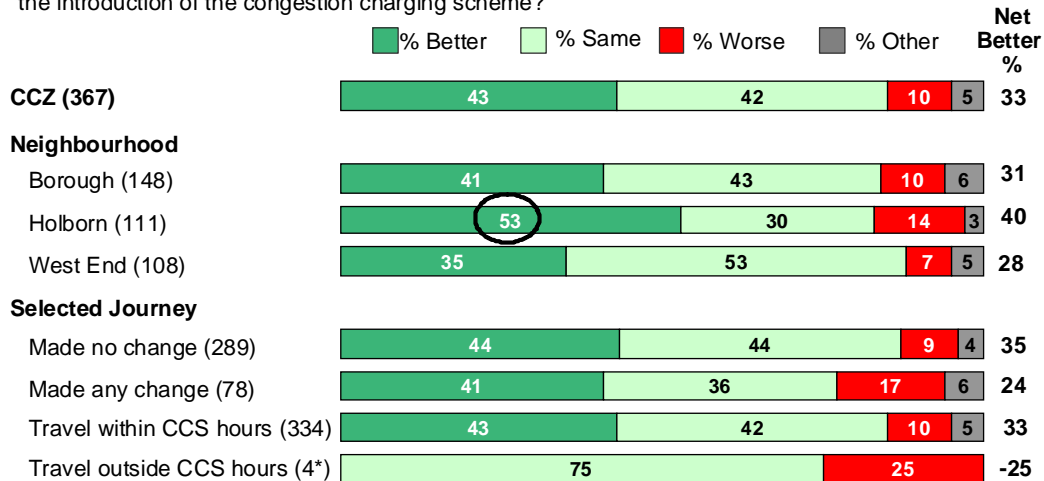
Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *CAUTION: Small base size. MORI

10.3. Overall travel experience

Overall, two-fifths of CCZ respondents feel that their overall travel experience on their selected journey has improved since the introduction of the charging scheme.

Figure 10.5. CCZ: Overall travel experience on selected journey

Do you think the **overall travel experience** is better, worse or the same on your selected journey since the introduction of the congestion charging scheme?



Statistically significant Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *CAUTION: Small base size. MORI

- Respondents from Holborn neighbourhood are significantly more likely to say that things have improved than respondents from the other two neighbourhoods. They are also generally more positive elsewhere in the survey.
- No significant differences occur between the other subgroups.

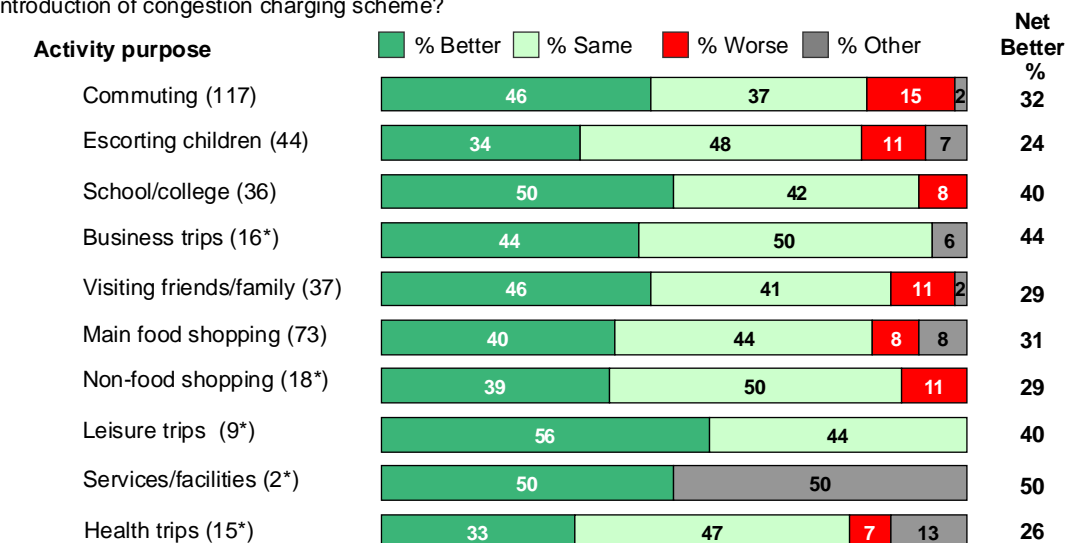
The majority of CCZ respondents noting an improvement in overall travel experience on their selected journey following the introduction of the charging scheme had expected to do so. However, for some (23%) this improvement was unexpected, rising to a third amongst respondents from Holborn neighbourhood (based on 59 respondents).

Amongst the 38 respondents feeling that their overall travel experience has deteriorated, half had not expected this.

There is little difference in opinion amongst respondents travelling for different journey purposes, with school/college and leisure trips being cited as improving the most (although this is based on small sample sizes).

Figure 10.6. CCZ: Overall travel experience on selected journey by purpose

Do you think the **overall travel experience** is better, worse or the same on your selected journey since the introduction of congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *CAUTION: Small base size.

MORI

Of those CCZ respondents who think that their selected journey is now better, reasons given include improved transport links, decreased congestion and reduced journey times.

For the minority of CCZ respondents (10%) who think that their selected journey is now worse, an emphasis is placed on increased congestion, crowding on buses and the impression that no improvements have actually been made to public transport.

10.4. Quality of selected journey

Predictability and time spent waiting are the factors that have improved the most amongst CCZ respondents who have undertaken their selected journey since the introduction of the charging scheme.

For every aspect of quality of travel on their selected journey, a higher proportion of CCZ respondents say that each has improved rather than declined since the introduction of the scheme.

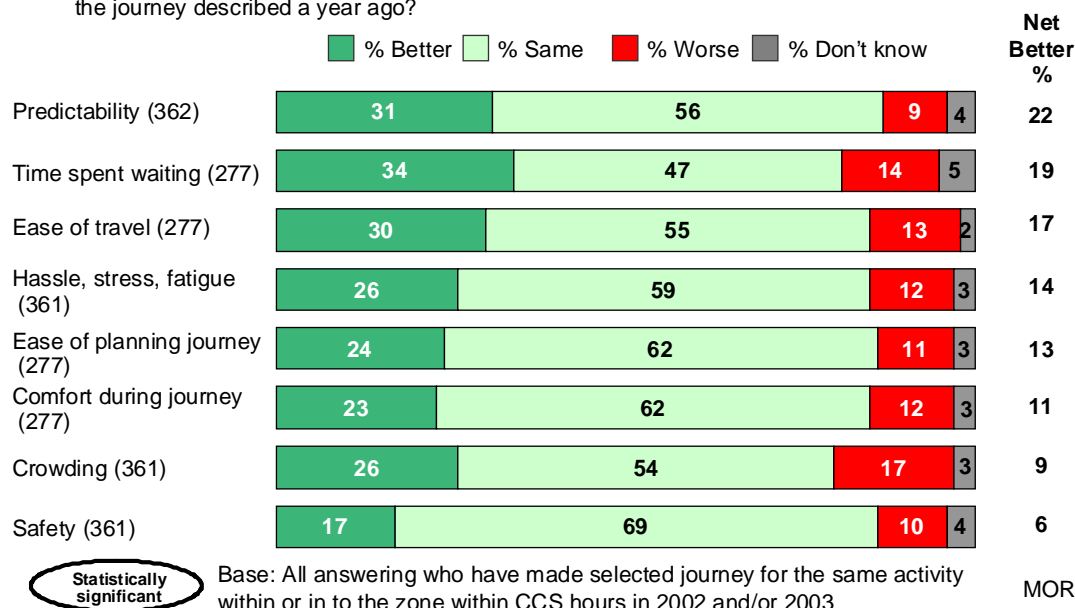
Amongst CCZ respondents safety has shown the smallest improvement, as illustrated below:

Our road is easier to cross but the main routes are more difficult so we need more crossings – for example the Edgware Road has a lollypop lady for school children.

West End, AB, 35-54, Female, Working, Driver

Figure 10.7. CCZ: Quality of travel

Is the quality of your travel better, worse or around the same for the following factors compared with the journey described a year ago?



Statistically significant

10.5. Changes in time spent travelling for selected journey

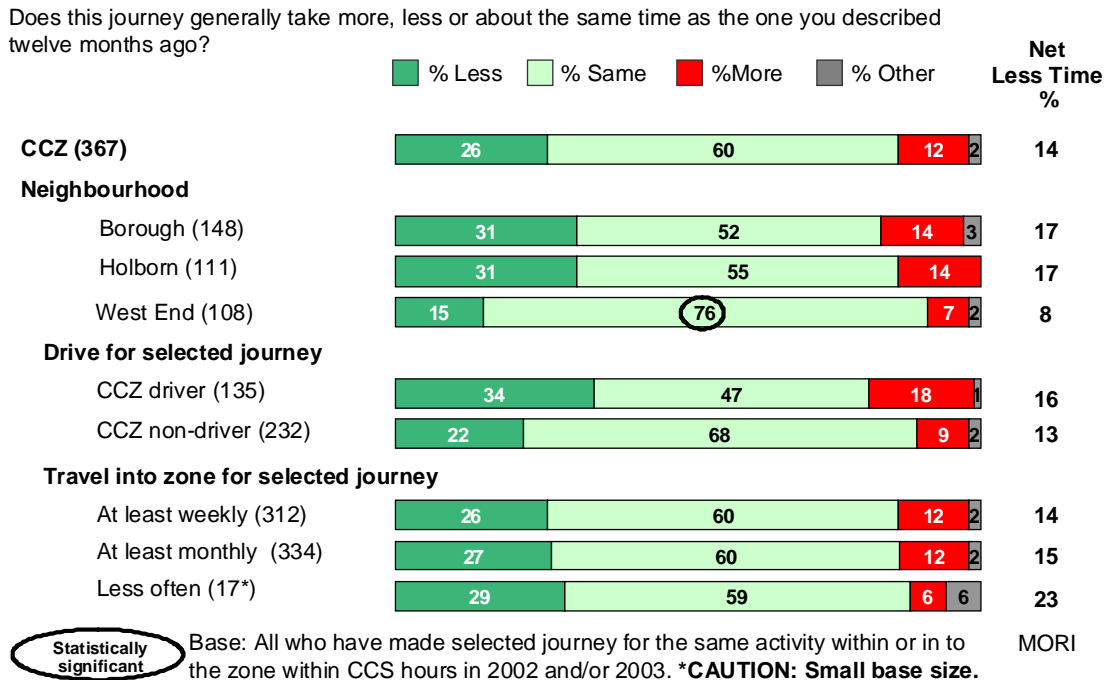
Amongst those experiencing change, there has been a net improvement in the amount of time spent travelling for the selected journey, with 26% feeling that they spend less time travelling now compared with 12% who feel they spend more time (Figure 10.8).

Despite the net reduction in journey time, a similar proportion of respondents now build in more time for delays as allow less time, although the majority have made no change (12% allow more time now, 10% allow less time, 65% allow the same amount of time and the remainder do not allow any time for delays).

Of the 95 respondents who feel they now save time on their selected journey, the vast majority (81%) report saving 15 minutes or less, with the most common time savings being 10 minutes (28% of respondents) and 5 minutes (23%).

A wider spread of views of time lost on the selected journey occurs amongst the 45 respondents who feel their journey now takes longer. 56% of respondents report losing up to 15 minutes on their journey following introduction of the charging scheme, while a third (36%) lose between 20 minutes to an hour.

Figure 10.8. CCZ: Time spent travelling for selected journey



- The only significant difference among the main sub-groups is among neighbourhoods, where respondents living in the West End are more likely to say that their selected journey takes the same length of time as before.
- A third of drivers say they spend less time travelling for their selected journey since before the introduction of the charge.

Two-thirds of those who had saved or lost time say this is in line with their expectations, a quarter say it is not.

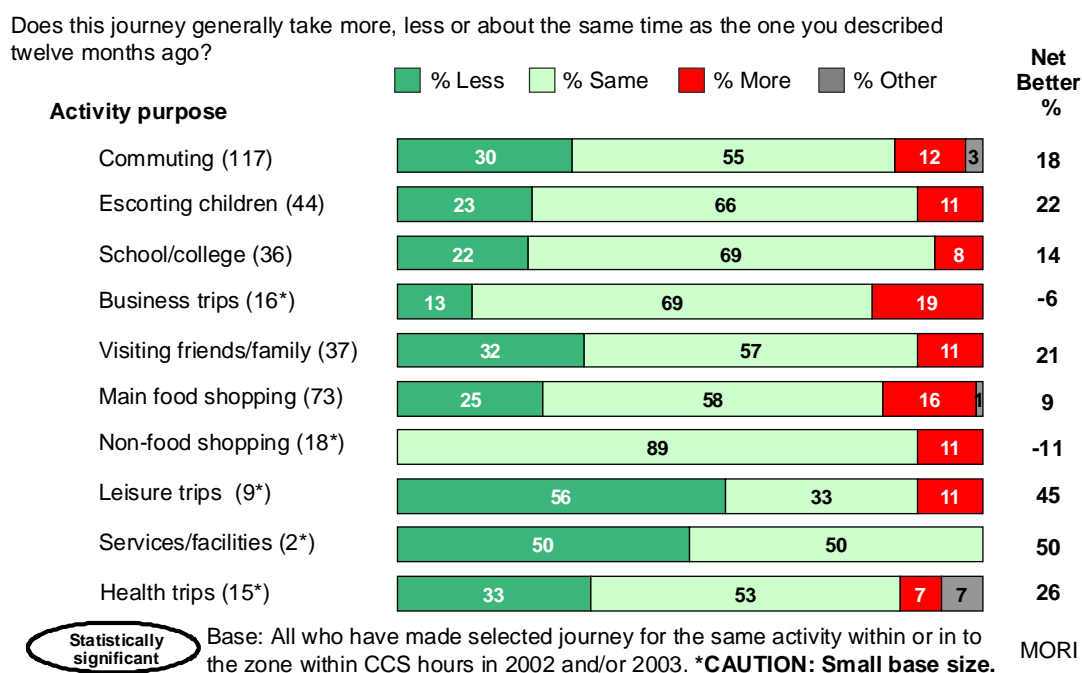
Nearly four in ten CCZ respondents save less than ten minutes on their selected journey with 28% saving around ten minutes, 16% between ten and twenty minutes and just 6% more than twenty minutes.

The most common way of using time saved is to 'relax more' (19%), while 12% say they 'don't gain enough time to do anything much' and 9% are now able to spend 'more leisure time at home'. Only a small proportion (11%) say they have reorganised their day or routine due to their shorter journey time with a fifth of them say they are now able to get up later.

Of those who have lost time on their selected journey, 40 believe it is taking up to ten minutes more. Just over a quarter lose between ten and twenty minutes, 17% lose between twenty minutes and half an hour and one in ten say they lose more time than this.

For those who have lost time on their journey, 15% report 'more stress, tiredness or hassle'. Respondents say that they are have less time to do other things and have to allow for extra journey time. Around half say that they have reorganised their day or routine due to their longer journey time. Two in five say they now have to leave home earlier, while three in ten get up earlier to cope with their increased journey time.

Figure 10.9. CCZ: Time spent travelling for selected journey by purpose



Around a third of CCZ respondents commuting for their selected activity or travelling to visit family and friends say their journey now takes less time than before compared with 12% who believe it takes longer (Figure 10.9).

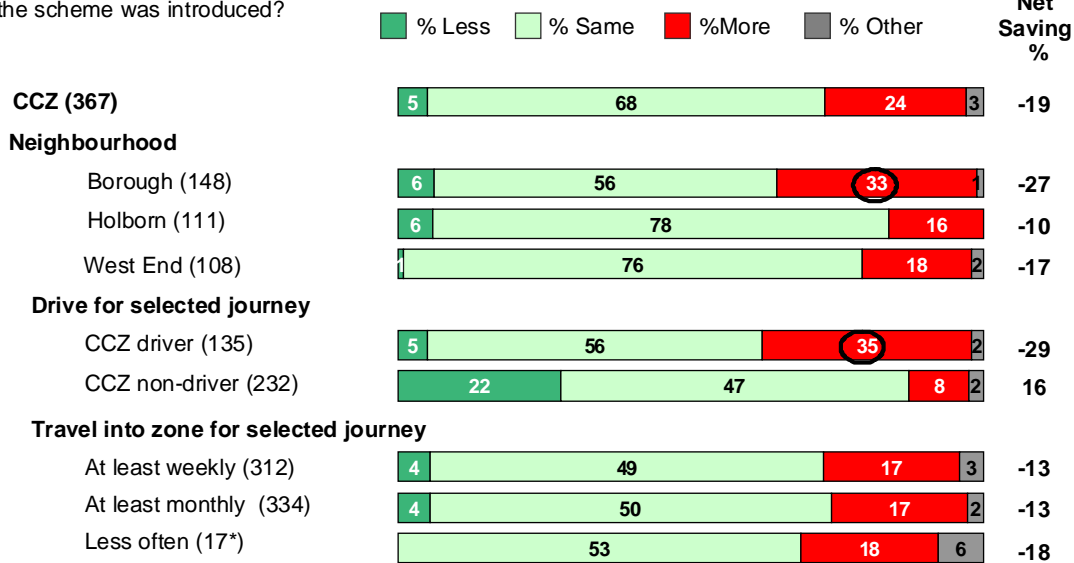
10.6. Changes in travel costs for selected journey

The majority of CCZ respondents say there is no change in their spending on travel for their selected journey (68%), however around a quarter say they are now paying more for their journey, while only 5% are paying less (Figure 10.10).

Of those noticing an increase in travel costs, over 70%, believe that spending has been affected because they now have to pay the charge, with a quarter commenting on paying their annual charge of £126 a year.

Figure 10.10. CCZ: Spending on travel for selected journey

Can you tell me if your total spending on travel for the selected journey including parking, petrol and the congestion charge and public transport fares is more, less or about the same as the one you made before the scheme was introduced?



Statistically significant

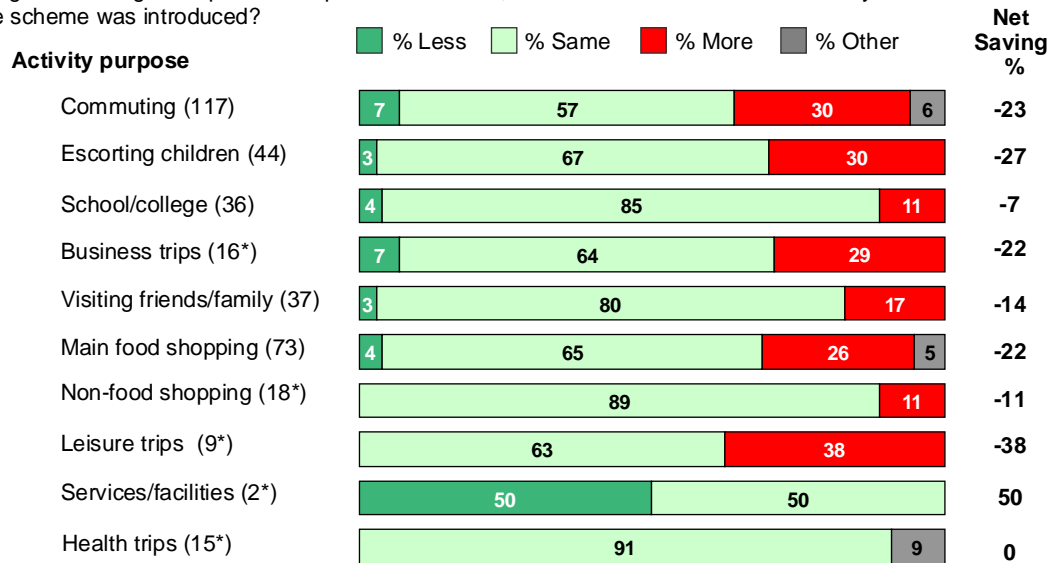
Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *CAUTION: Small base size.

MORI

- In all of the main subgroups, a higher proportion of respondents feel travelling for their selected journey now costs more rather than less.
- Respondents from Borough are significantly more likely to say their journey now costs more than those living in Holborn or the West End.
- As for Inner London, drivers are significantly more likely to say their journey costs more due to the residents' charge (35%). However, the majority say it is about the same, not noticing the change – reinforcing earlier findings.
- There is no significant difference for the cost of journeys which are more or less frequent.
- Adults aged 25-34 are significantly more likely to say that their journey now costs more (41%).

Figure 10.11. CCZ: Spending on travel for selected journey by purpose

Can you tell me if your total spending on travel for the selected journey including parking, petrol and the congestion charge and public transport fares is more, less or about the same as the one you made before the scheme was introduced?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *CAUTION: Small base

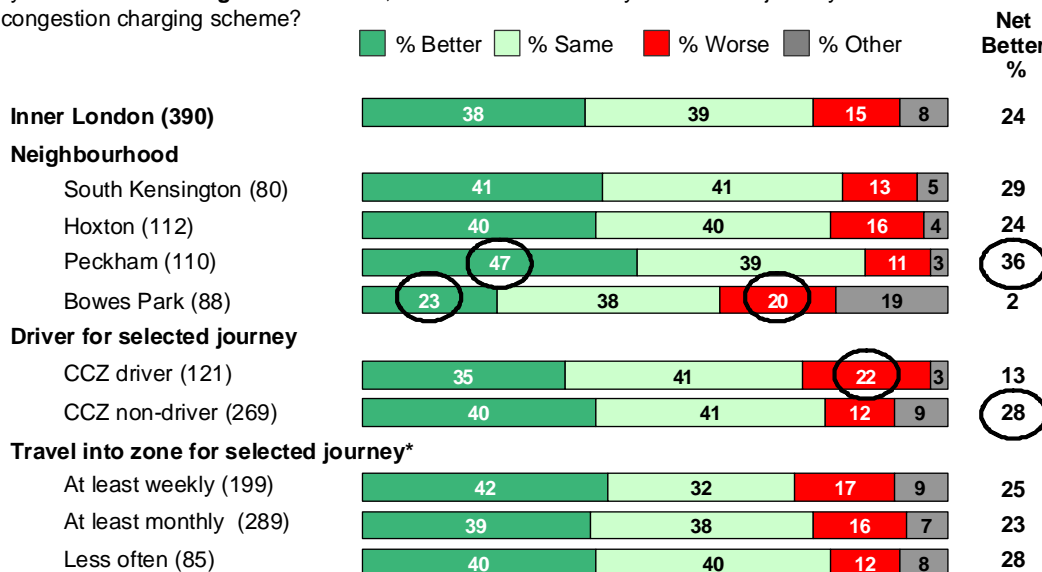
MORI

10.7. Inner London - traffic congestion

Overall, there has been a perceived reduction in the amount of traffic congestion on the selected journey, with 38% feeling that congestion has eased compared with 15% who feel it has increased. This contrasts with overall views where congestion in the local area is perceived to be worse (Chapter 3).

Figure 10.12. Inner London: Traffic congestion on selected journey

Do you think **traffic congestion** is better, worse or the same on your selected journey since the introduction of congestion charging scheme?



Statistically significant

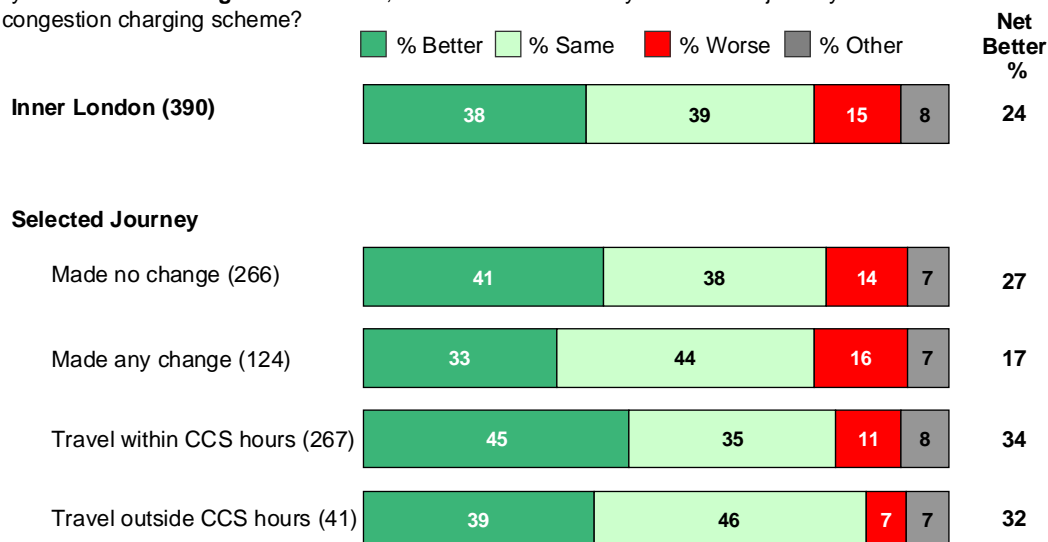
Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *Based on all answering

MORI

- In all the subgroups presented, more respondents think traffic congestion has improved rather than worsened on their selected journey.
- Whether a respondent is a car driver on the selected journey is a significant factor affecting that journey experience, with 22% of car drivers believing congestion is now worse compared with 12% of non-drivers.
- Respondents from Peckham are significantly more likely to report that congestion has eased, whilst those from Bowes Park are least likely to do so.
- There are no significant differences in experiences of traffic congestion between people relative to their frequency of travel on selected journey.
- Respondents from lower income households are twice as likely to say that congestion has improved than those from higher income households (annual income under £20,000 compared with over £35,000).
- Respondents aged under 25 are significantly more likely to say there has been an improvement than those aged 35 and over (41% compared with 21%).

Figure 10.13. Inner London: Traffic congestion on selected journey

Do you think **traffic congestion** is better, worse or the same on your selected journey since the introduction of congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003

MORI

- Respondents who have made no change to their selected journey following the introduction of the charging scheme, are more likely to say traffic congestion has improved on this journey compared with those have made a change (Figure 10.13).

- Slightly more respondents travelling within charging hours to those travelling outside hours say that congestion has eased.

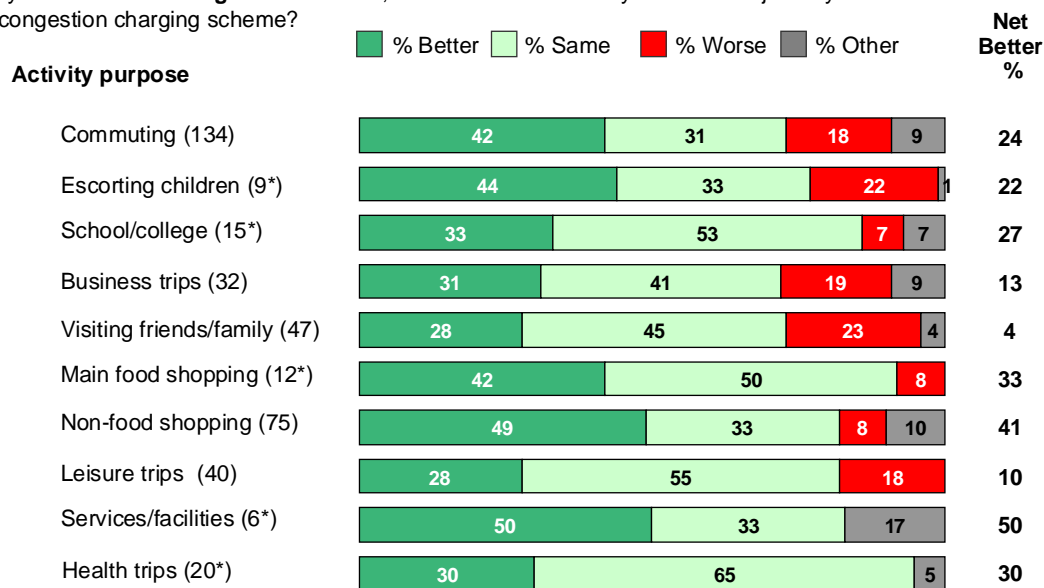
Expectation of changes in levels of congestion for their selected activity have, for the majority of Inner London respondents, been realised. For those who feel that congestion has now eased, 16% overall did not expect this – especially respondents from South Kensington (21%).

Overall, of those who believe traffic congestion has worsened on their journey, 71% expected this. Respondents from Hoxton and Bowes Park neighbourhoods were most likely to not expect this increase in congestion (but these figures are based on small sample sizes – less than 20 respondents).

For Inner London respondents whose selected activity purpose was commuting, perceptions towards traffic congestion have improved, while for those visiting friends and family or making leisure trips less so (Figure 10.14.).

Figure 10.14. Inner London: Traffic congestion on selected journey by purpose

Do you think **traffic congestion** is better, worse or the same on your selected journey since the introduction of congestion charging scheme?



Statistically significant

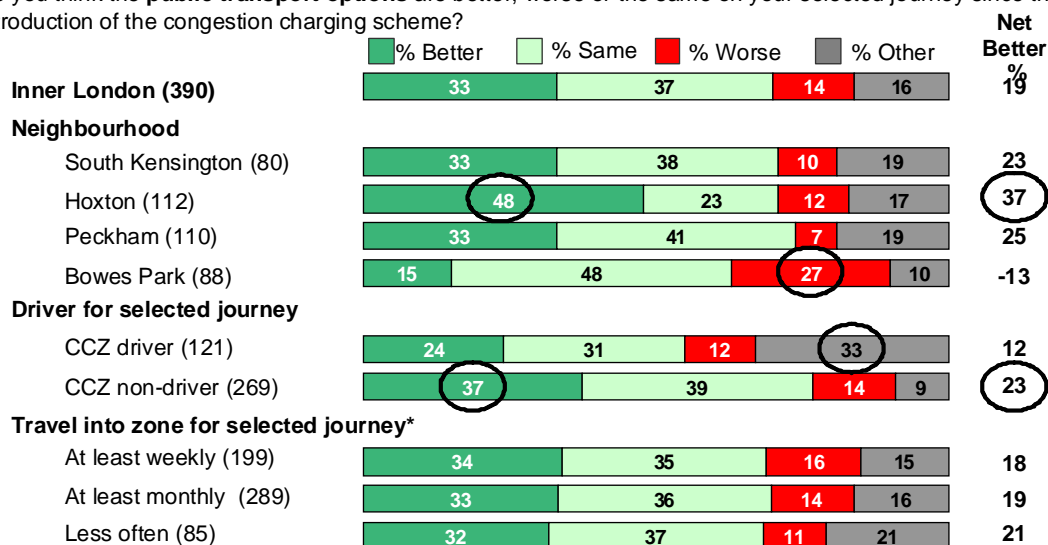
Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *CAUTION: Small base size. MORI

10.8. Public transport options

Overall, Inner London respondents feel that public transport options on their selected journey are better now compared with before the charging scheme, with those in Hoxton most impressed. Respondents from Bowes Park are most pessimistic with one quarter reporting that options have worsened in line with overall views in Chapter 3.

Figure 10.15. Inner London: Public transport options on selected journey

Do you think the **public transport options** are better, worse or the same on your selected journey since the introduction of the congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *Based on all answering.

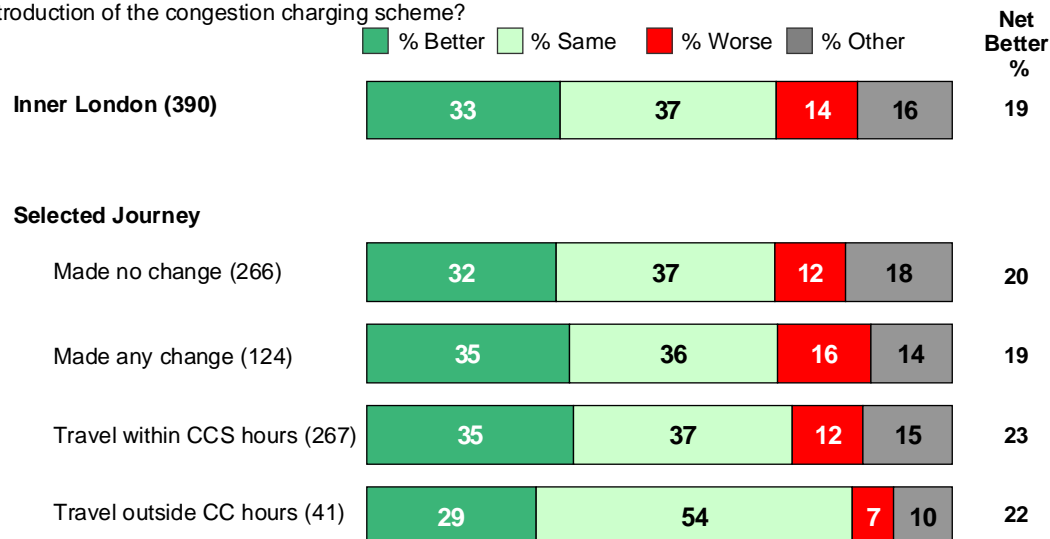
MORI

- Non-drivers are more likely to say public transport options have improved. There is no significant difference depending on how frequently respondents travel into the zone for any activity.
- Respondents with household incomes below £35,000 per year are significantly more likely to say public transport options have improved on their selected journey. This is reflected in the social grade of respondents, where twice as many from the DE social group say public transport is now better than ABs.
- There is no significant difference in opinion by frequency of travel on the selected journey.

No significant differences in perceptions of public transport options on the selected journey occurred between those who have made no change and those who have changed, or between those travelling inside or outside charging hours on their selected journey (Figure 10.16).

Figure 10.16. Inner London: Public transport options on selected journey

Do you think the **public transport options** are better, worse or the same on your selected journey since the introduction of the congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003

MORI

Just under a fifth of respondents say that the improvement in public transport options on their selected journey was unexpected (based on the 129 respondents saying public transport options have improved). This improvement was least expected by respondents from Peckham and Bowes Park (note: this is based on small sample sizes, 36 and 13 respectively).

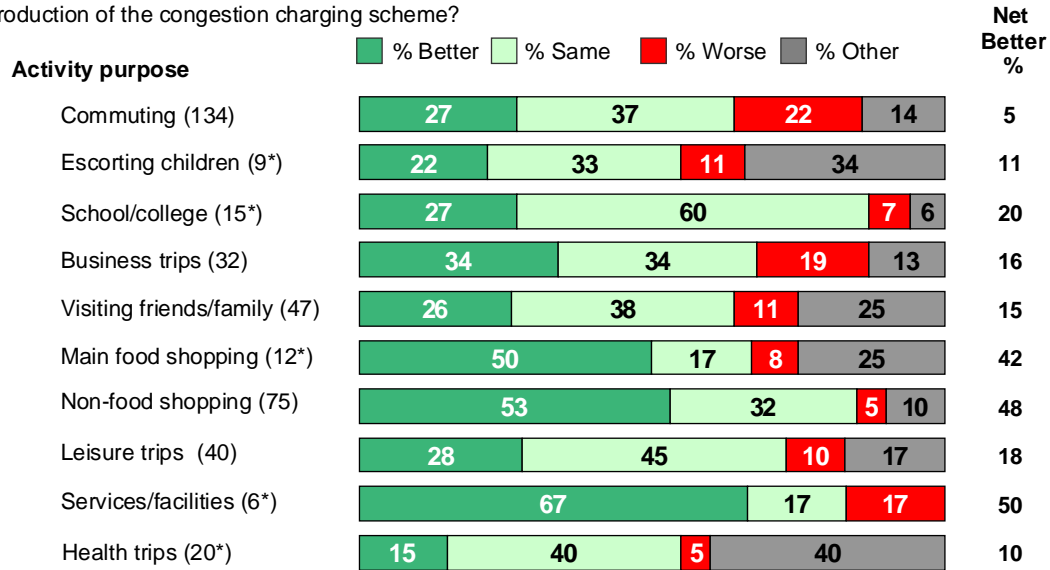
Of those who say public transport options are now worse on their selected journey, 57% expected this but 28% did not (based on the 53 respondents who say public transport options have got worse). Respondents from South Kensington and Peckham neighbourhoods were most likely to not expect this (note: these figures are based on very small sample sizes, 8 respondents in both neighbourhoods).

Experiences of public transport have improved on all activities, particularly non-commuting related journeys (Figure 10.17).

A similar proportion of respondents whose journey involved visiting friends and family say public transport options have improved on their selected journey to those who say that congestion has eased. Highest net gains are amongst those travelling for shopping and services/facilities trips (the latter is based on a very small sample size) - (Figure 10.17).

Figure 10.17. Inner London: Public transport options on selected journey

Do you think the **public transport options** are better, worse or the same on your selected journey since the introduction of the congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *CAUTION: Small base size.

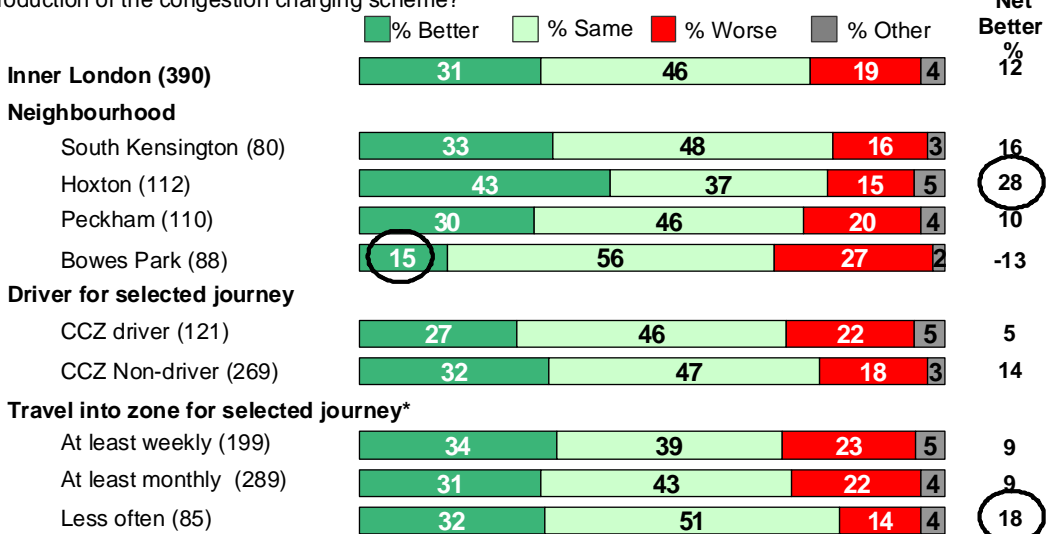
MORI

10.9. Overall travel experience

Apart from those who have experienced no change (46%), Inner London respondents report their overall travel experience on their selected journey to have improved since before the introduction of the scheme, especially respondents from the Hoxton neighbourhood.

Figure 10.18. Inner London: Overall travel experience on selected journey

Do you think the **overall travel experience** is better, worse or the same on your selected journey since the introduction of the congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. *Based on all answering.

MORI

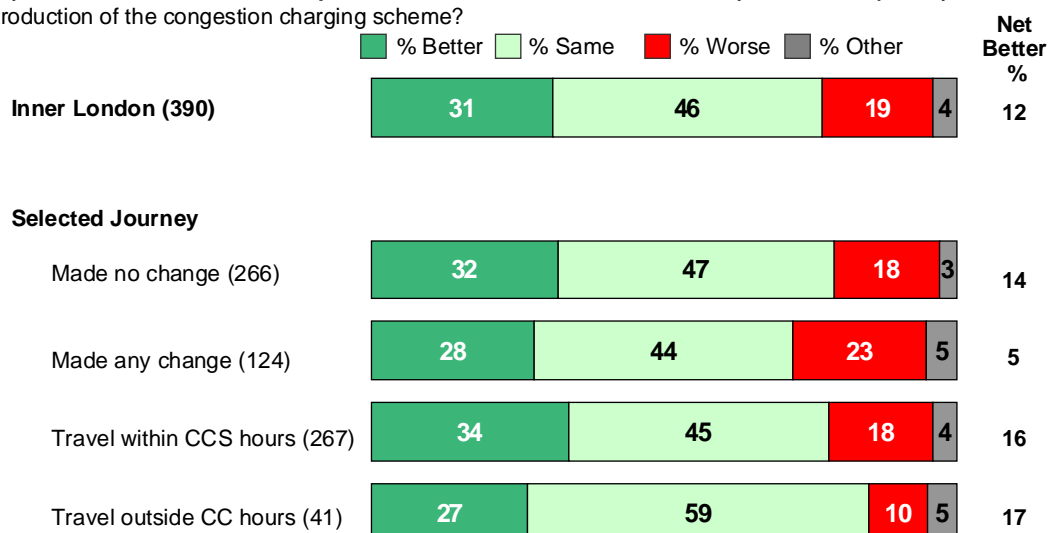
Respondents from Hoxton are generally more positive about their experiences of congestion charging as seen in other chapters of the report. Respondents from Bowes Park are significantly more likely to say that their overall travel experience has deteriorated.

- Respondents who travel infrequently into the zone for any activity are significantly less likely to say that their overall travel experience is now worse.
- Respondents with lower household incomes (less than £20,000 per year) and males are significantly more likely to say that overall travel experience has improved, whilst those aged between 35-54 years are significantly less likely to say so.

Inner London respondents who have made some change to their selected journey are less likely to say their overall travel experience has improved than those who have not changed (Figure 10.19).

Figure 10.19. Inner London: Overall travel experience on selected journey

Do you think the **overall travel experience** is better, worse or the same on your selected journey since the introduction of the congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003

MORI

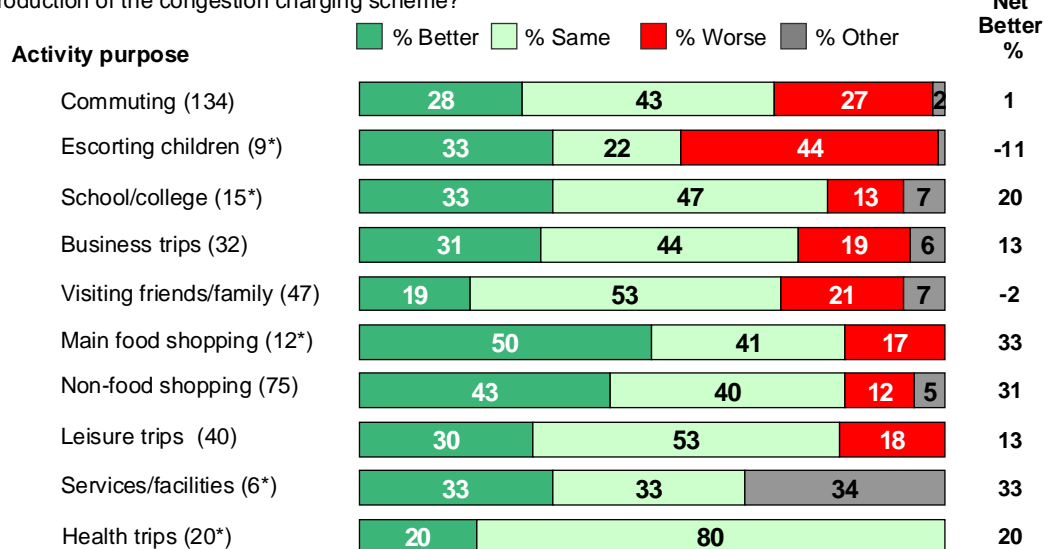
For those who say that their overall travel experience has improved since the introduction of the scheme, one quarter did not expect this (based on 120 respondents), with respondents from Peckham (33%) and Bowes Park (31%) more likely not to expect improvements compared with the other neighbourhoods (33 and 13 respondents respectively).

Overall, of the 76 respondents who say their travel experience has worsened on their selected journey, two-thirds expected this.

Overall travel experience has improved across all selected activities, with the exception of commuting and visiting friends and family where similar proportions say experience has improved as got worse (Figure 10.20). A greater proportion of respondents who escorted children to school for their selected activity say that overall travel experience has got worse, although this is based on a small sample size.

Figure 10.20. Inner London: Overall travel experience on selected journey by purpose

Do you think the **overall travel experience** is better, worse or the same on your selected journey since the introduction of the congestion charging scheme?



Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003. ***CAUTION: Small base size.**

MORI

For those Inner London respondents who think their journey is now better, an emphasis is placed on improved transport links, which are now able to function more efficiently due to a decrease in traffic congestion, leading to a reduction in journey times.

Amongst those who think that their journey is now worse (76 respondents), unreliable public transport, increased congestion (particularly on the zone boundary) and less parking are the main issues. Similar numbers also cite the inconvenience of paying the charge as a reason for their journey now being worse.

10.10. Quality of selected journey

Overall, between one half and two-thirds of Inner London respondents say the various quality aspects of their selected journey have remained the same since the introduction of the charging scheme (Figure 10.21).

The greatest improvement is predictability of journeys, where 28% say this aspect has improved compared with only 16% who say it has deteriorated. Greater proportions of respondents note that the level of hassle, stress or fatigue and crowding experienced on their selected journey has worsened than improved since the introduction of the charging scheme.

This includes car drivers who feel that paying the charge increases the ‘hassle factor’, as this illustration shows.

It’s a lot of hassle to go to a pay point. I already have a busy schedule without worrying about the charge.

Peckham, Secondary school children, AB, 25-34, Male, Working, CCZ Driver

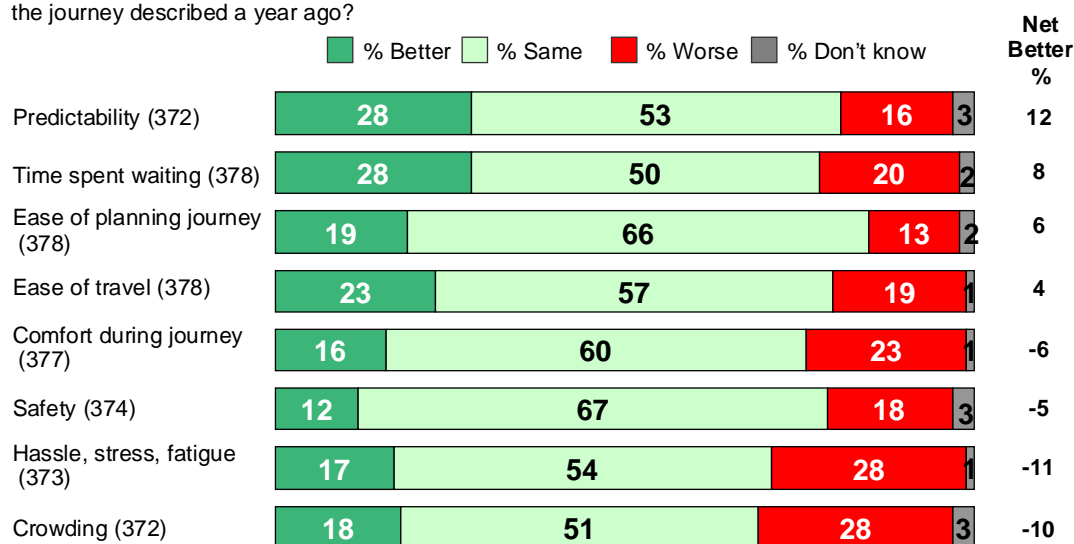
Respondents changing to bus believe this has improved their journey quality, as shown below.

I do not like the tube since I felt I was going to be pushed onto the rails by the volume of people, and now that the buses are quick because of the congestion charge I prefer to use them.

Peckham, Under 25, AB, Female, Working, Non CCZ Driver

Figure 10.21. Inner London: Quality of travel

Is the quality of your travel better, worse or around the same for the following factors compared with the journey described a year ago?



Statistically significant

Base: All answering who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003

MORI

10.11. Changes in time spent travelling for selected journey

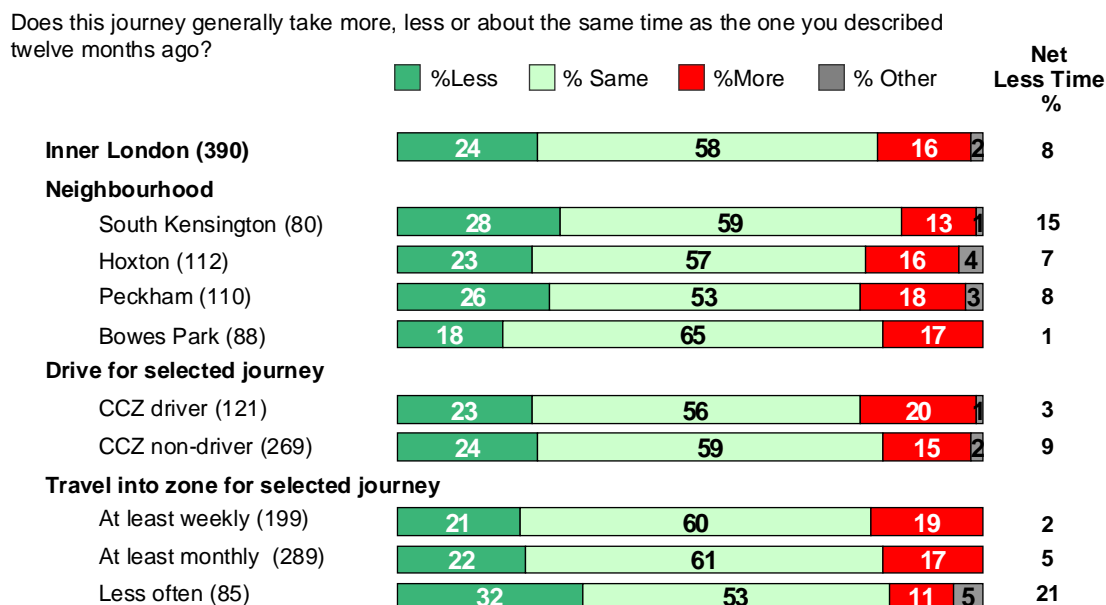
Over half (58%) believe they are spending the same amount of time travelling for their selected journey now, with 24% feeling that their journey is shorter and 16% who feel their journey takes longer (Figure 10.22).

A greater proportion of respondents allow more time for delays than before the introduction of the charge, although the majority have made no change (18% allow more time now, 10% allow less time, 63% allow the same amount of time and the remainder do not allow any time for delays).

Two thirds of respondents who feel their journey is quicker following the introduction of the charging scheme, say they now save up to 15 minutes on their selected journey. As with CCZ respondents, the most commonly saved length of time is 10 minutes (26%).

The amount of time lost on the selected journey is slightly higher amongst Inner London respondents than CCZ respondents, with 41% saying they now lose between 20 minutes to an hour and 51%, 15 minutes or less

Figure 10.22. Inner London: Time spent travelling for selected journey



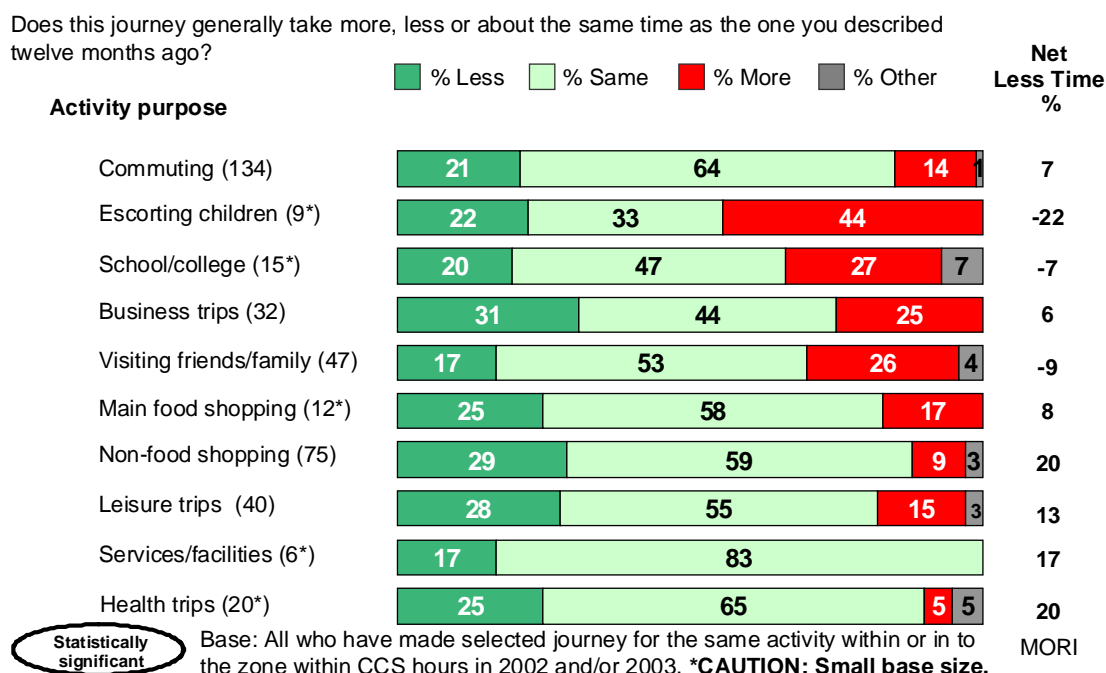
Statistically significant

Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003

MORI

- In all of the main subgroups, more respondents feel they now spend less time than more travelling for their selected activity.
- There are no significant differences by neighbourhood and by those who did and those that did not drive for their journey.
- Respondents who only travel into the zone occasionally are more likely to feel their journey time is shorter.
- Respondents from higher income households are almost three times as likely to say that they spend more time travelling now compared with lower income households.

Figure 10.23. Inner London: Time spent travelling for selected journey by purpose



Inner London respondents travelling for business, non-food shopping and leisure trips for their selected journey are more likely to say that their journey now takes less time, while those escorting children are the most likely to say their journey now takes longer (although this is based on small sample sizes - Figure 10.23).

Of those who do save time on their journey, a fifth save less than ten minutes, a quarter around ten minutes, 28% between ten and twenty minutes and 16% more than twenty minutes.

The most common use of the saved time is to 'relax more', (14 respondents) while one in ten 'spend more time at work/college' (11 respondents) or simply have 'more leisure time at home' (9%). Over one in ten say they have reorganised their day or routine due to their shorter journey time, however a quarter of them say they are now able to 'do more things with their children' (note: small base sizes).

Of those who lose time on their selected journey, 15% lose less than ten minutes and a similar proportion lose around ten minutes. Around half lose between ten and twenty minutes, one in ten lose between twenty minutes and half an hour and almost a quarter say they lose more time than this.

For those whose journey time is now longer, 'more stress, tiredness or hassle' is a common theme. Respondents say they are more rushed, have to plan more, have to work later, have less leisure time and are annoyed by their travel experience. Just over half say that they have reorganised their day or routine due to their longer journey time, mainly leaving home earlier or getting up earlier.

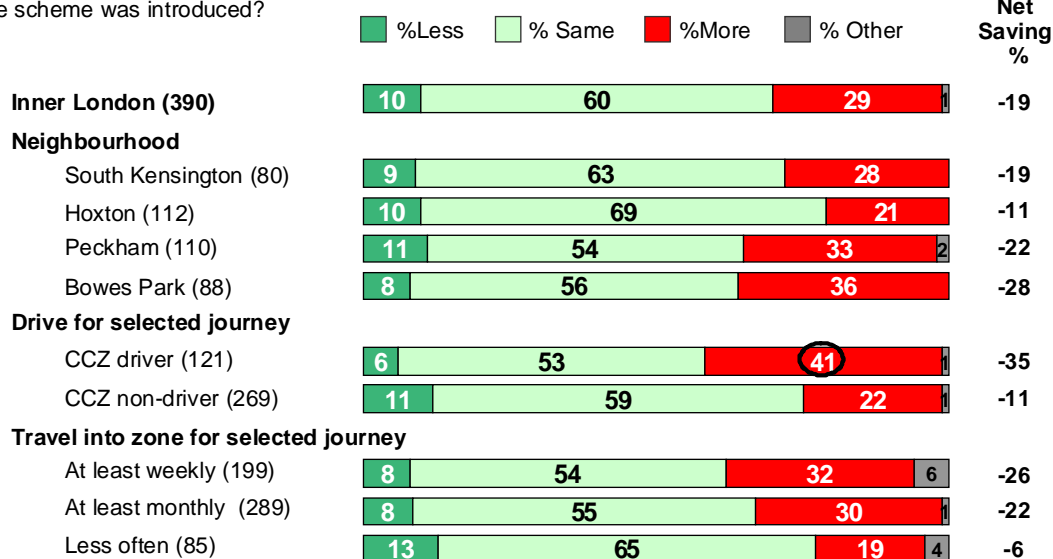
10.12. Changes in spending for selected journey

Although the majority of Inner London respondents (60%) feel that their spending for the selected journey is the same as before the introduction of the charge, 29% say that their journey now costs more as with 15% believing it costs less. A third of those who have increased spending say this is by £5 or more. At the same time, 6% of drivers now say the journey costs less, mainly because they are now paying less for parking (Figure 10.24.).

The most common reason behind changes in journey costs is due to paying the charge, although smaller proportions say they have had to spend more on petrol or public transport fares.

Figure 10.24. Inner London: Spending on travel for selected journey

Can you tell me if your total spending on travel for the selected journey including parking, petrol and the congestion charge and public transport fares is more, less or about the same as the one you made before the scheme was introduced?



Statistically significant

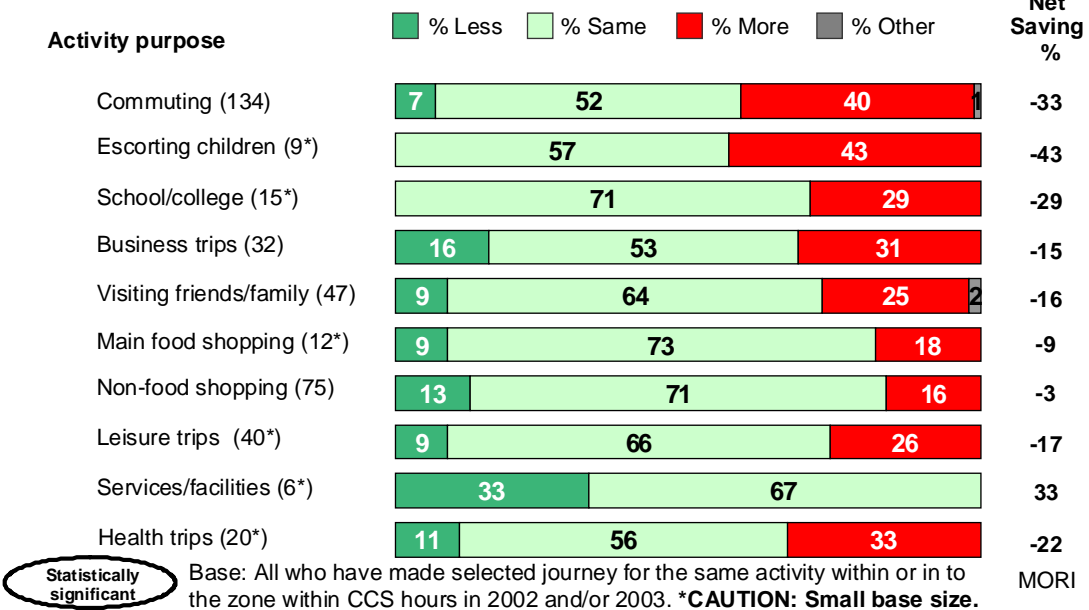
Base: All who have made selected journey for the same activity within or in to the zone within CCS hours in 2002 and/or 2003

MORI

- There are no significant differences by neighbourhood.
- Those who travel into the charging zone less often than once a month are more likely to say their spending on their journey has not changed.
- Respondents from higher income households are almost three times as likely to say that their journey now costs more compared with lower income households (40% of those with an annual income over £35,000 compared with 15% with annual household income under £20,000).

Figure 10.25. Inner London: Spending on travel for selected journey by purpose

Can you tell me if your total spending on travel for the selected journey including parking, petrol and the congestion charge and public transport fares is more, less or about the same as the one you made before the scheme was introduced?

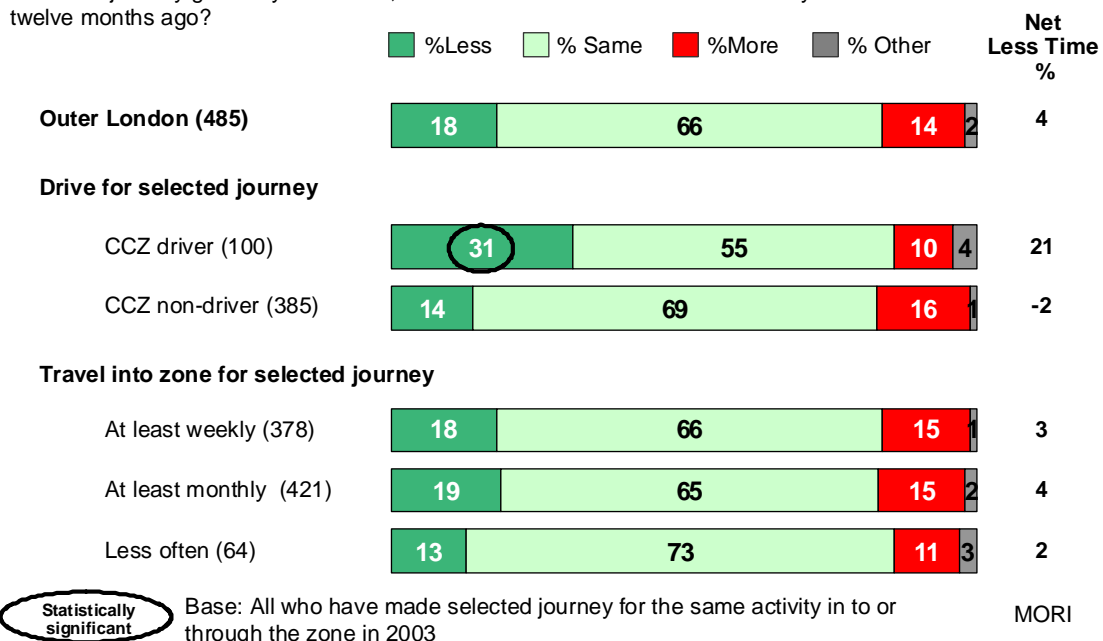


10.13. Outer London - changes in time spent travelling for selected journey

Two thirds of Outer London respondents feel they spend the same amount of time spent travelling on the selected journey, with 18% feeling that they spend less time travelling now compared with 14% who feel their journey takes longer (Figure 10.26).

Figure 10.26. Outer London: Time spent travelling for selected journey

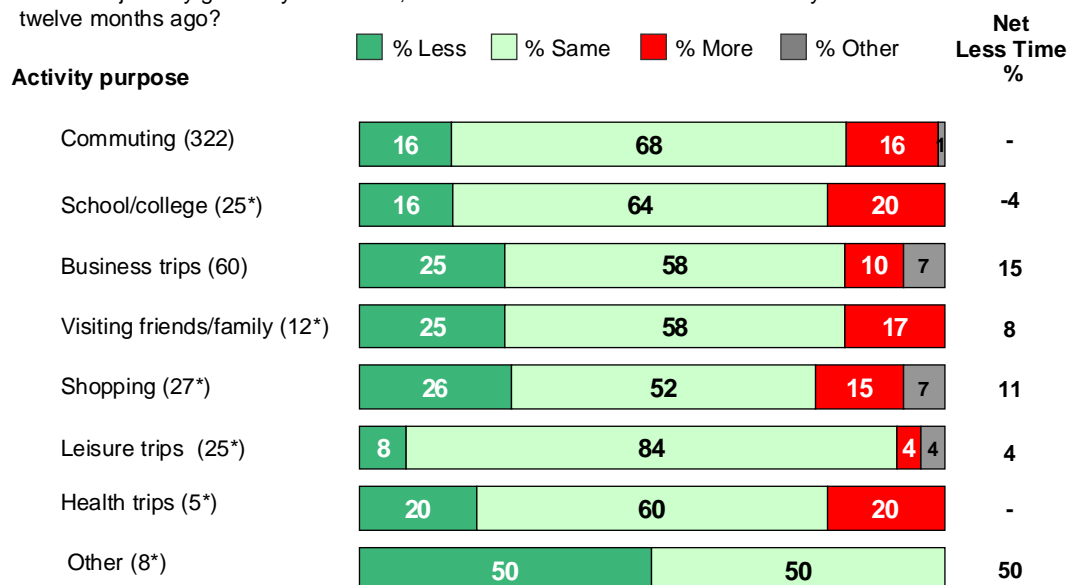
Does this journey generally take more, less or about the same time as the one you described twelve months ago?



- A significantly higher proportion of respondents who drive into the charging zone find their journey time is shorter.
- There are no significant differences in opinions by frequency of travel or any of the other subgroups.

Figure 10.27. Outer London: Time spent travelling for selected journey by purpose

Does this journey generally take more, less or about the same time as the one you described twelve months ago?



Statistically significant

Base: All who have made selected journey for the same activity in to or through the zone in 2003. *CAUTION: Small base size.

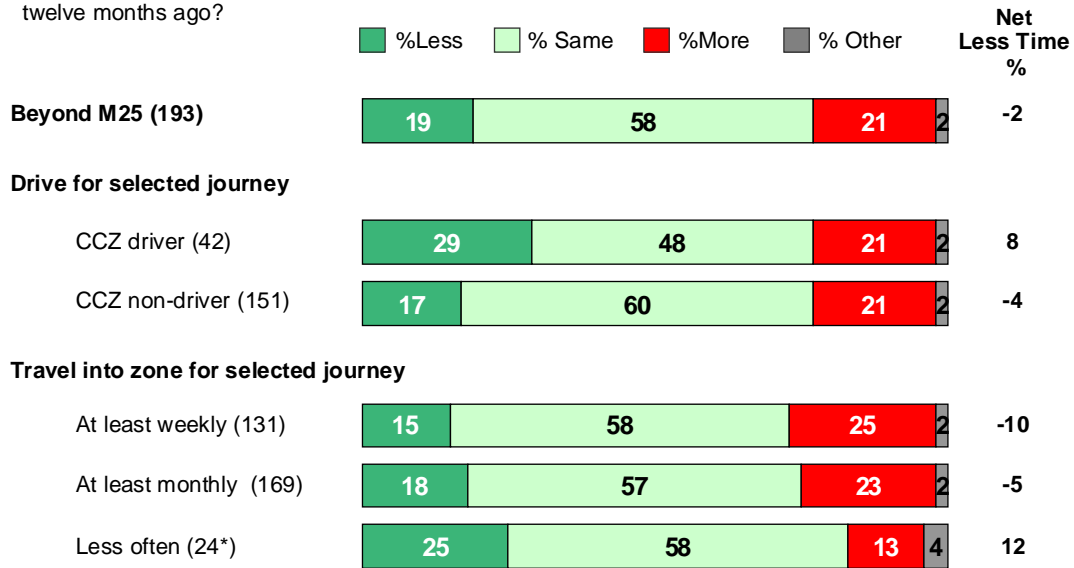
MORI

Outer London respondents travelling for business, visiting friends and family, shopping and leisure trips for their journey are more likely to say that their journey now takes less time, while those travelling to school or college are more likely to say that their journey now takes longer (note: this is based on small sample sizes - Figure 10.27).

In contrast to the London respondents, there has been a perceived net increase amongst respondents living beyond the M25 in the amount of travelling on the selected journey, with 21% feeling that they spend more time travelling now compared with 14% who feel the same from Outer London.

Figure 10.28. Beyond the M25 : Time spent travelling for selected journey by purpose

Does this journey generally take more, less or about the same time as the one you described twelve months ago?



Statistically significant

Base: All who have made selected journey for the same activity in to or through the zone in 2003. *CAUTION: Small base size.

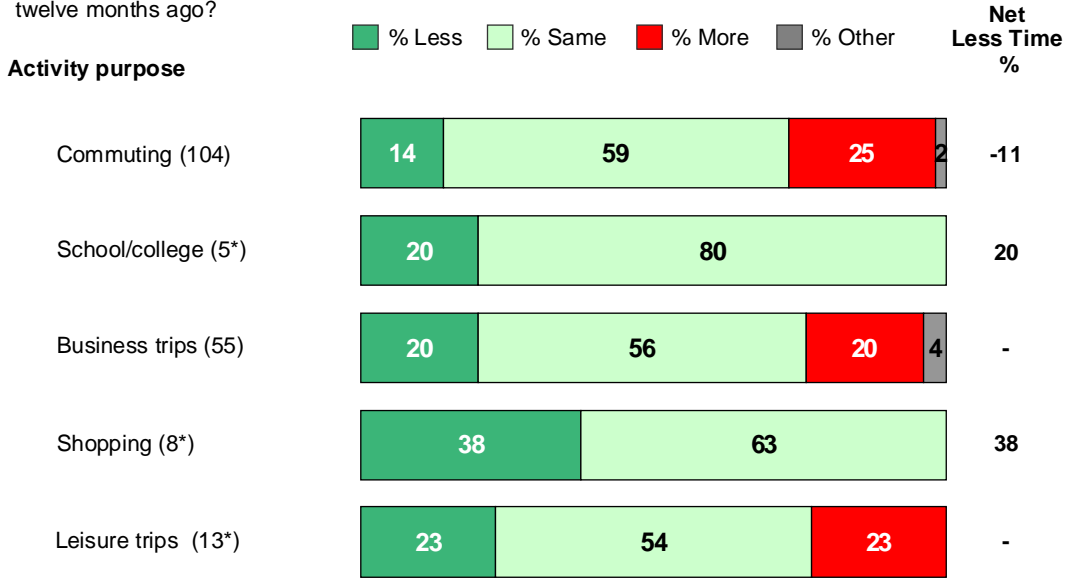
MORI

- There are no significant differences in opinions within any of the main subgroups.
- A higher proportion of respondents who drive report that they now spend less time travelling than those who did not drive, and those travelling less often than monthly are more likely to say their journey is quicker than those travelling more frequently. However, neither of these differences is statistically significant.

Respondents living beyond the M25 who are commuting for their journey are more likely to say that their journey now takes more time, while those travelling to school or college and shopping are more likely to say that their journey is quicker (although this is based on small sample sizes - Figure 10.29).

Figure 10.29. Beyond the M25 : Time spent travelling for selected journey by purpose

Does this journey generally take more, less or about the same time as the one you described twelve months ago?



Statistically significant

Base: All who have made selected journey for the same activity in to or through the zone in 2003. *CAUTION: Small base size.

MORI

11. Overall beneficiaries and losers of the congestion charging scheme (CCS)

Overview

This section focuses on how respondents thought they would be affected by the scheme and compares this to their actual experiences. The impact of the scheme is considered at both a personal and household level, through analysis of differential impact and adjustment within households.

Now that respondents have experienced the scheme, an increased proportion feel they have gained than expected this to be the case. Overall, significant numbers have found their experience is not as expected, both on themselves and their household. The majority who have changed their view say that the charging scheme has actually made no difference to them.

The results of personal and household impact are broadly similar. However, it should be noted that, where there is negativity, respondents are more negative (and remain so) about the overall impact of the charging scheme on their household than about their own personal experience.

The most emphasised positive effect of the scheme is the impact on traffic congestion; no one factor is singled out when considering the negative impact of the charging scheme, with a diverse range of issues spontaneously mentioned.

Congestion charging zone (CCZ) neighbourhoods

One in four CCZ respondents believe they have personally gained as a result of the congestion charging scheme.

The actual experience of the scheme for those in the CCZ is better than expected in 2002, with a fifth of those saying that their household has gained as a result of the congestion charging scheme (CCS). This marks a small increase in comparison to expectations in 2002. However, a greater proportion (46%) say that the scheme has made no difference to their household, almost double that expecting this outcome in 2002. There has also been a significant fall in those who feel that their household has lost as a result of the CCS. In 2002 approaching two-fifths expected to lose, which is the reality for only 26%.

Inner London neighbourhoods

Around a quarter of respondents in the Inner London neighbourhoods believe that they have personally gained as a result of the scheme (23%), significantly higher than expected to gain (14%).

However there has been little movement amongst those who expected to lose and those who say they actually have, just over a quarter are negative towards the scheme in both 2002 and 2003.

An increased proportion now say that the CCS has made no difference to them personally (45% compared to 40% in 2002).

In Inner London a smaller proportion (in comparison to those in the CCZ) say that their household has gained as a result of the CCS (14%). However this has seen a small 4% point rise in comparison to 2002 expectations.

Outer London and beyond the M25

Just under half in Outer London and beyond the M25 feel that the scheme has made no difference to them personally (44%), this is 17% points higher than expected.

A similar picture emerges when Outer London and beyond the M25 respondents consider the impact the CCS has had on their household: a greater proportion report that the scheme has actually made no difference to their household, with two thirds now saying this.

11.1. Congestion charging zone - personally affected

One in four of CCZ respondents say that overall they have personally gained as a result of the congestion charging scheme. There has been a +7% point increase in comparison to expectations in 2002. That is one in five more respondents saying they have gained rather than lost than expected to.

Just over two-fifths say that the scheme has made no difference to them (43%), a significantly higher proportion than anticipated this in 2002 (31%). Whilst a quarter say they think they have lost as a result of the scheme, this figure is a third lower than those who expected to lose and is the same proportion as those who say they have gained.

Table 11.5. Overall, do you think you have (will) personally gained/gain or lost/lose as a result of the Congestion Charging Scheme?

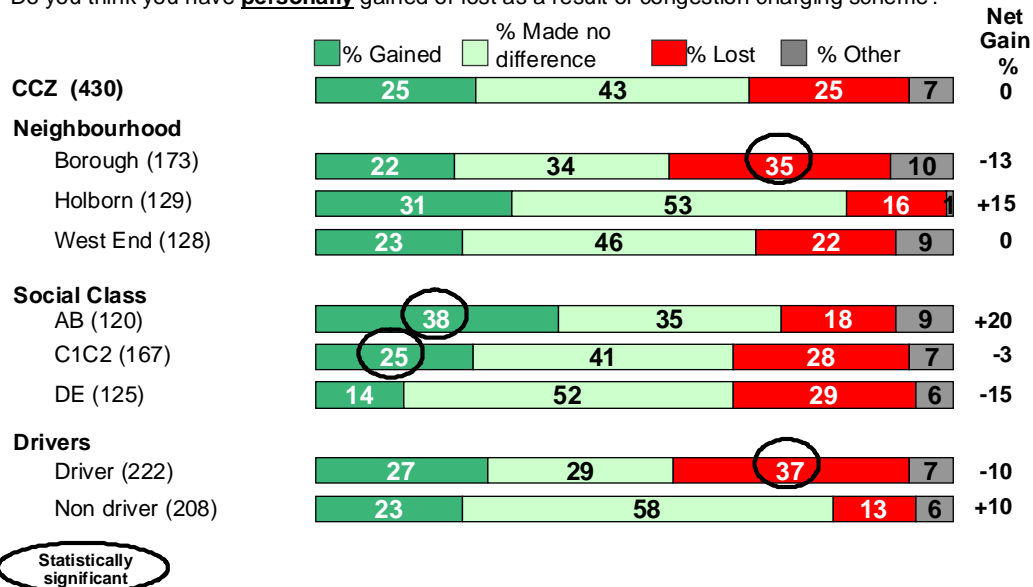
CCZ	Expectation 2002	Actual Experience 2003	+/-
<i>Base: All respondents</i>	(430) %	(430) %	(430) %
Gained	18	25	+7
Made no difference to me	31	43	+12
Positives and negatives balance each other out	6	6	0
Lost	37	25	-12
No answer/don't know	8	1	-7
Net gain (Gained-Lost)	-19	0	+19

Source: MORI

- Those most likely to say they have personally gained from the scheme in the CCZ neighbourhoods come from social class AB households, households without cars and those in the 35-54 age bracket (Figure 11.1).
- Those most likely to say they have personally lost are CCZ drivers, those from lower income households (social class DE) and those aged 25-34.
- Drivers, those with a higher income and white respondents are by far the most positive.

Figure 11.1. CCZ: Personal gain and loss


Do you think you have **personally** gained or lost as a result of congestion charging scheme?



11.2. Personally affected: Expectations compared with experience

There is less difference between expectation and experience for those in the CCZ neighbourhoods who thought that they would either gain or not be affected by the scheme (Table 11.2). However, a third of those who thought they would lose now say that the scheme has made no difference to them; while a further 20% in this group say that their actual experience of the CCS has been so positive that they now feel they have gained.

Table 11.2. CCZ: Personal impact

	Would gain (74)	Will make no difference to me (133)	+/- will balance each other out (24)	Will lose (165)	Can't say at this time (34)	Total
	%	%	%	%	%	
Gained (107)	10	4	1	8	2	25
No difference to me (185)	4	20	3	12	3	43
+/- balance each other out (25)	1	1	1	3	1	6
Lost (108)	2	6	0	15	2	25
No answer/don't know (5)	0	*	0	*	0	1
Total (430)	17	31	6	38	8	100

* under 0.5%

Source: MORI

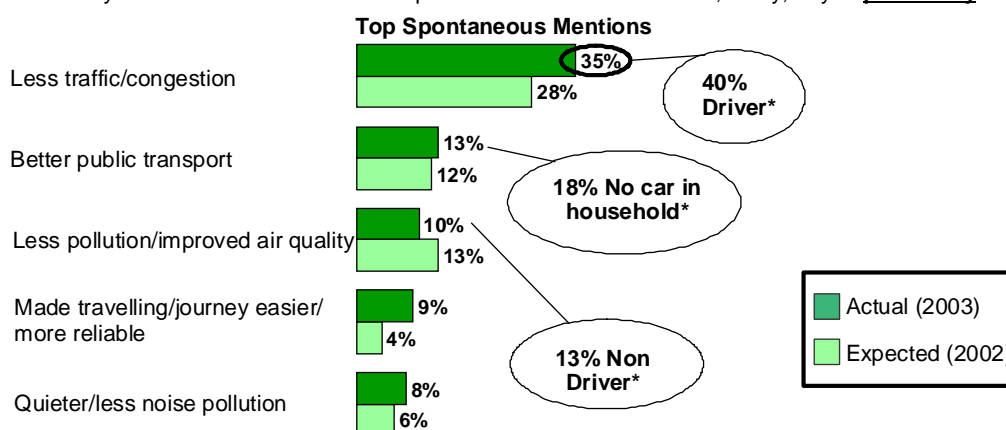
11.3. Reasons for personal gain

When respondents in the CCZ neighbourhoods describe the positive effects of the CCS, over a third spontaneously mention less traffic congestion (35% up from 28% who expected this to be the case). This is followed by 12% who note the improvement in public transport, 10% who emphasise the improvement in air quality, just under one in ten who say that travelling is now easier and more reliable or that there is now less pollution. As in Inner London 'better public transport' has an emphasis on improvements in bus services, 12% spontaneously mention this in 2003.

With the exception of less traffic congestion, these factors were mentioned by similar proportions in 2002, confirming that the anticipated positive effects of the scheme is broadly similar to the actual experience.

Figure 11.2. CCZ: Positive effects of the CCS

What do you think are / will be the main positive effects of the scheme, if any, to you **personally**?



Base: All CCZ respondents (430)

Statistically significant

*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

11.4. Reasons for personal gain: Individual expectation and experience

The majority of those in the CCZ who feel they have gained (when they expected to lose) say that the main reasons for this are: less traffic congestion, easier and more reliable travel and the reduction experienced in journey times.

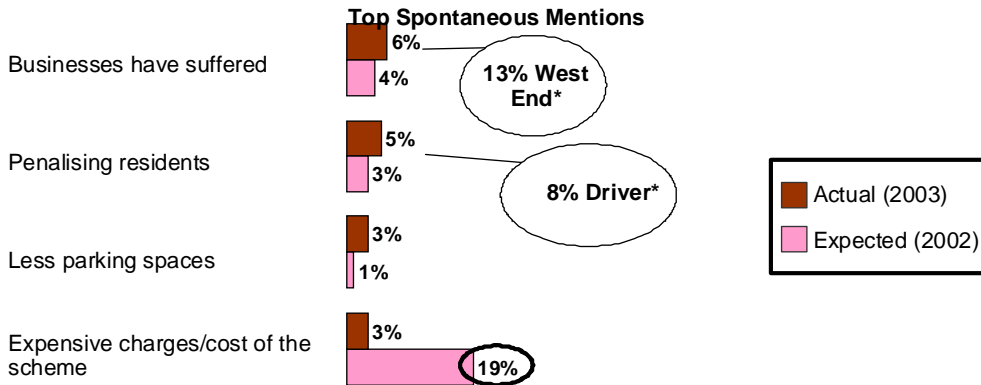
This is similar to those who say that they have personally gained (who expected to do so) where most spontaneously cite the decrease in traffic congestion as a key reason. One in five also mention improved air quality (19%), followed by the perception that travelling has now become both easier and more reliable. For 12% better buses (and more of them) play a significant role in their positive attitude towards the scheme.

11.5. Reasons for negative views

No dominant negative factors are spontaneously mentioned no reasons for loosing as a result of the charging scheme. A range of issues have to be taken into account, from the criticism that 'businesses have suffered' (6%), to the feeling that 'residents are being penalised' (5%), to the assertion that there 'are less parking spaces' (3%) and that 'charges are too expensive' (3%) (Figure 11.3).

Figure 11.3. CCZ: Negative effects of the CCS

What do you think are / will be the main negative effects of the scheme, if any, to you **personally**?



Base: All CCZ respondents(430)

Statistically significant

*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

- Respondents in the West End are the most likely to cite the loss of business as a main criticism against the CCS, mirroring earlier findings; while CCZ drivers are more likely to stress that the charge is simply ‘penalising residents’.

This is emphasised by the following comment made by a respondent:

There are hold-ups on the edge of the zone

West End, C1C2, 35-54, Female, Working, Non-driver

Pollution – more traffic on the local roads, stricter parking control, more traffic lights, too many traffic wardens outside schools – more penalty fines, more stress

Borough, AB, 35-54, Female, Not working, Driver

11.6. Reasons for negative views: individual expectation and experience

For the small numbers who now say that they have personally lost (when they expected to gain) from the CCS, the dominant reasons explaining their feelings centre on the perception that there is now less local parking and increased stress while travelling.

Those in the CCZ who thought they would personally lose (and continue to say that they have) as a result of the scheme, provide a fairly diverse range of reasons explaining their feelings. Mainly the criticisms focus on the belief that the CCS has resulted in only patchy improvements, less parking locally, expensive charges, a loss of business for some, as well as an increase in road rage.

11.7. Household beneficiaries and losers

A fifth of respondents living in the zone feel their household has gained as a result of the charging scheme. This marks a small increase in comparison to expectations in 2002. However, nearly half (46%) believe the scheme has made no difference to their household, almost double the figure expecting this to be the case in 2002. There has also been a significant fall in those who feel that their household has lost as a result of the scheme. In 2002 approaching two-fifths expected to lose, in 2003 the proportion who say they actually lost is only 26%.

Mirroring feelings about *personal* gain and loss, the actual experience of the scheme for the *household* is better than the expectation, as illustrated below.

Children return earlier from school – less tension of when they will return. Less anxiety at risk of accidents.

Borough, AB, 35-54, Female, Working, Driver

My daughter has lost out, she's less likely to be driven home or picked up as she lives in the congestion charge zone. Arrangements are made for outside the congestion charge hours which involves more planning.

Hoxton, AB, 35-54, Female, Working, Non CCZ Driver

11.8. Inner London - Personally affected

Around a quarter of respondents from the Inner London neighbourhoods now say that they have personally gained as a result of the scheme (23%). This is a significantly higher proportion than expected to gain in 2002 (14%). However there has been little movement amongst those who expected to lose and those who say they actually have, just over a quarter are negative towards the scheme in both 2002 and 2003. An increasing proportion now say that the scheme has made no difference to them personally (45% compared to 40% in 2002 - Table 11.3).

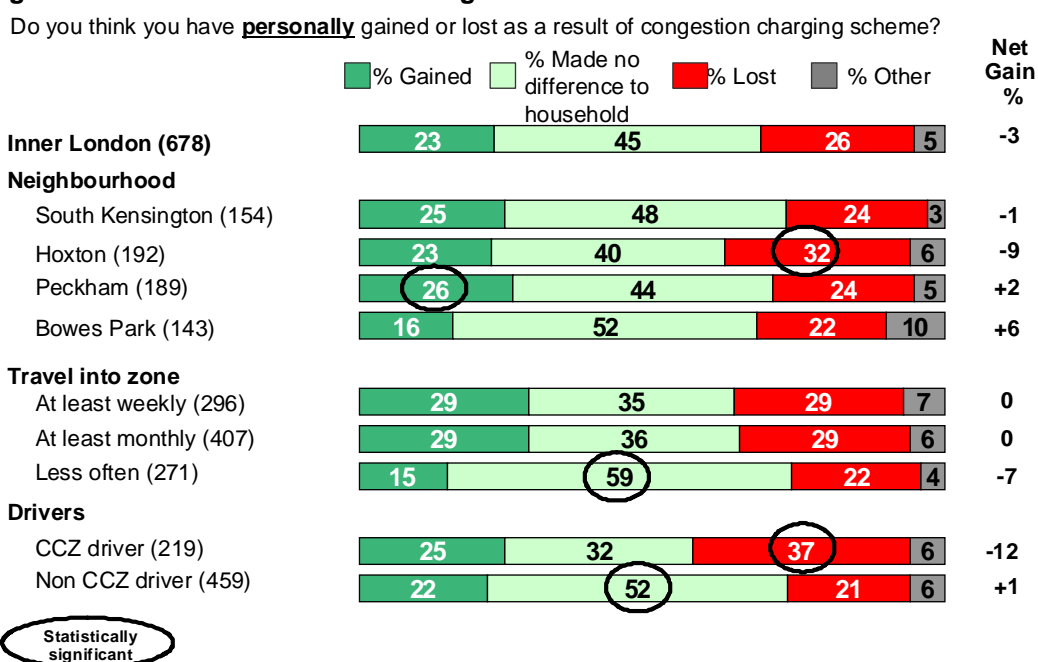
Table 11.3. Overall, do you think you have/will personally gained/gain or lost/lose as a result of the Congestion Charging Scheme?

	Inner London		
	Expectation 2002	Actual Experience 2003	Change +/-
<i>Base: All respondents</i>	(678) %	(678) %	(678) %
Gained	14	23	+9
Made no difference to me	40	45	+5
Positives and negatives balance each other out	9	5	-4
Lost	27	26	-1
No answer/don't know	10	*	-10
Net gain (Gained-Lost)	-13	-3	+10

Source: MORI

- Those in Peckham are more likely to say that they have personally gained (in comparison to those from the Bowes Park neighbourhood); more frequent travellers into the zone are also most likely to say that they have gained as a result of the CCS (Figure 11.4).
- Those most likely to say they have personally lost are those from the Hoxton neighbourhood and those who drive into the zone.
- As seen in other sections of this report, Inner London respondents refer to improvements in public transport, in particular non car owning households, those over 55 years and public transport users are the most positive.

Figure 11.4. Inner London: Personal gain and loss



11.9. Personally affected: Expectations compared with experience

For those in Inner London, expectation and experience has tended to differ more than for those in the CCZ. While 27% thought they would lose, only 14% say that this has actually happened. As the following table shows, where expectations do not match experience, the majority state that the scheme has actually 'made no difference' (Table 11.4).

Table 11.4. Inner London: Personal impact

	Would gain (97)	Make no difference to me (272)	+/- would balance out (64)	Would lose (180)	Can't say at this time (62)	Total (675)
	%	%	%	%	%	%
Gained (156)	6	9	3	2	3	23
Made no difference to me (307)	6	22	4	9	4	45
+/- balance each other out (37)	1	1	2	1	1	5
Lost (175)	1	7	2	14	2	26
Total (675)	14	40	9	27	9	100

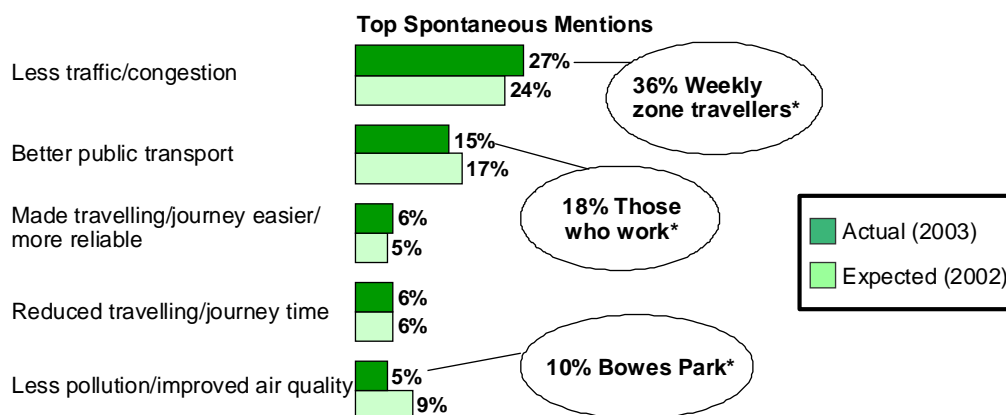
Source: MORI

11.10. Reasons for personal gain

For those in Inner London the reduction in traffic congestion and improvements in public transport remain the key positive factors, spontaneously mentioned by 27% and 14% respectively. For those who said 'better public transport', there is now a specific emphasis on buses, 12% of respondents in 2003 emphasised that buses appear to be 'better', that there are now more of them or that they are faster or less crowded.

Figure 11.5. Inner London: Positive effects of the CCS

What do you think are / will be the main positive effects of the scheme, if any, to you personally?



Base: All Inner London respondents (678)

Statistically significant

*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

- Weekly zone travellers and CCZ drivers are more likely to emphasise less traffic/congestion; whilst for those who work the improvement in public transport is particularly important (Figure 11.5).
- Non drivers place more emphasis on improved air quality; while those in the Bowes Park neighbourhood are significantly more likely to mention the reduction in air pollution as a positive effect of the scheme.

As one Inner London respondent said:

This is an improvement that changed the transport system for good.

Peckham, C1C2, 35-54, Male, Working, Non CCZ Driver

11.11. Reasons for personal gain: individual expectation and experience

The most commonly cited factor for those who now say they have gained (when they expected to lose) is the perception that travelling has been made easier and more reliable (27%). A strong emphasis is also placed on the improvements in the bus services, that there are now more of them, they are faster and they are less crowded. A further 13% (both factors) cite the importance of reduced journey times and less stress overall, when providing reasons why they feel that they have personally gained as a result of the scheme.

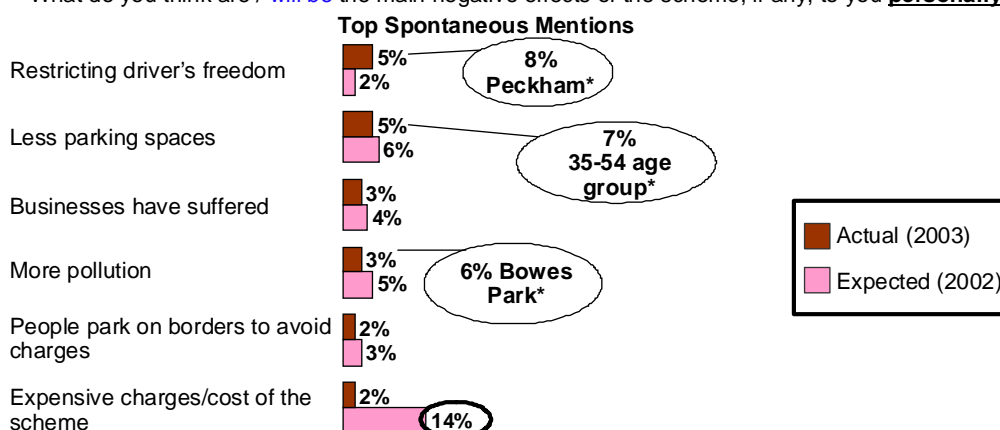
Three in ten Inner London respondents who say they have personally gained (who expected to do so) spontaneously emphasise the importance of reduced journey times. A further quarter (23%) stress the importance of better traffic flow, whilst improved bus services and increased reliability/ease of travel are key factors for a further (14% each).

11.12. Reasons for negative views: individual expectation and experience

The reasons behind respondents' negative feelings towards the CCS are fairly diverse. Restrictions on driver's freedom and fewer parking spaces are both spontaneously mentioned by 5% of respondents. In most cases, fewer than anticipated have experienced negative effects, particularly the cost of the scheme which was mentioned by just 2% compared to the 14% who anticipated it (Figure 11.6).

Figure 11.6. Inner London: Negative effects of the CCS

What do you think are / will be the main negative effects of the scheme, if any, to you personally?



Base: All Inner London respondents (678)

Statistically significant

*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

- While only 3% in Inner London mention businesses have suffered, those in Hoxton and Peckham are slightly more likely to identify this as one of the main negative effects of the scheme (5% and 6% respectively).

An illustration of negative impact of the scheme is given below:

When it first started traffic was running freely, now it's back as it was. Within 2 months people found ways round it.

Hoxton, DE, 55+, Female, Not working, Non CCZ Driver

11.13. Reasons for negative views: individual expectation and experience

The small number who now say that they have personally lost (when they expected to gain) predominantly say that they 'do not agree with the scheme as they already pay 'car tax' or that the CCS is a 'restriction of driver's freedom'.

For those in Inner London who thought they would personally lose (and continue to say that they have) the most common factor mentioned, is the feeling that CCZ drivers are being penalised (13%). Others mention that there are less parking spaces or that drivers now have to park outside the CCZ, whilst further Inner London respondents emphasise the increase in stress when driving and the perception that businesses have lost profit.

11.14. Household beneficiaries and losers

In Inner London, fewer respondents (in comparison to those in the CCZ) say that their household has gained as a result of the CCS (14%). However this has seen a small 4% point rise in comparison to 2002 expectations. This compares to 23% gain at a personal level, so there is the perception that other people in the household have not been as positively affected as themselves (see Table 11.5).

Table 11.5. Whether household has/will gain as a result of the scheme

Inner London	Expectation 2002	Experience 2003	Change +/-
<i>Base: All multi-person households answering</i>	(509)	(509)	(509)
Gained	10	14	+4
Made no difference to household	34	57	+23
+/- balance each other out	10	3	-7
Lost	27	23	-4
Don't know	19	2	-17
Net gain (Gained-Lost)	-17	-9	+8

Over half of Inner London respondents (57%) believe the scheme has made no difference to their household. As with the CCZ respondents, this is where differences between expectations and experience are most evident.

While the proportion who say that they feel their household has lost as a result of the scheme is still higher than those who say they have gained, the net difference between these scores is closer than 'expected' in 2002.

11.15. Household beneficiaries and losers: expectations compared with experience

There is relatively little difference between expectation and experience amongst Inner London respondents who thought that the scheme would 'not make a difference' to their household. However following the pattern seen throughout this section, for those whose expectations differ from their actual experience, most are likely to say that the scheme has made 'no difference to their household'. Additionally a quarter of those who thought that the positives and negatives would balance out now say that they have actually gained from the scheme (Table 11.6).

Table 11.6. Inner London: Household impact

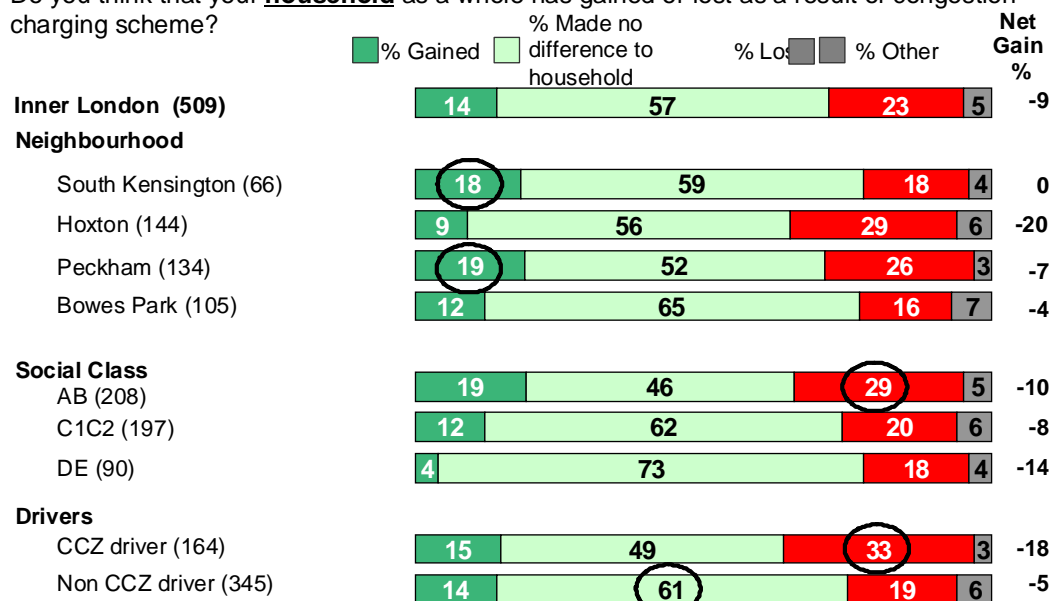
	Household would gain (48)	Make no difference to household (173)	+/- would balance out (49)	Household would lose (140)	Can't say how it would affect household (66)	Total (678)
	%	%	%	%	%	%
Gained (72)	3	5	2	2	2	15
Made no difference to household (291)	5	25	5	14	9	58
+/- balance out (16)	0	1	1	1	0	3
Lost (119)	1	6	1	12	2	23
No answer/don't know (11)	0	1	0	1	0	2
Total (678)	10	36	10	29	14	100

Source: MORI

- Those most likely to say their household has gained are from the Peckham and South Kensington neighbourhoods, more likely to travel into the zone frequently, and aged 35-54 (Figure 11.7).
- Those most likely to say their household has lost are CCZ drivers.

Figure 11.7. Inner London: Household gain and loss

Do you think that your **household** as a whole has gained or lost as a result of congestion charging scheme?



Statistically significant

Base: All Inner London multi-person households (509)

11.16. Outer London and beyond the M25- Personally affected

As with Inner London and the CCZ, just under half of respondents in Outer London and beyond the M25 now say that the scheme has made no difference to them personally (44%), this is 17 percentage points higher than expectations (Table 11.7).

Table 11.7. Whether have/will personally lose or gain as a result of the scheme

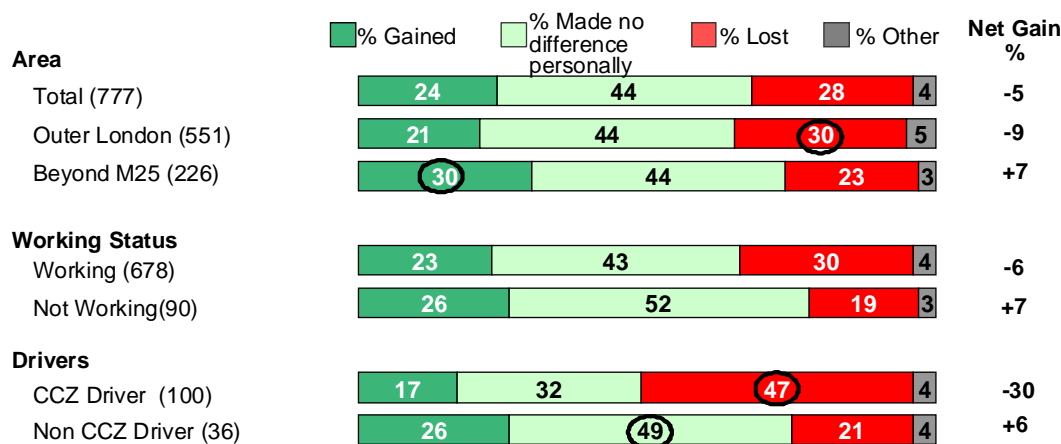
Outer London and beyond the M25	Expectation 2002	Actual Experience 2003		Change +/-
<i>Base: All who travelled into the zone during CCZ hours/All respondents</i>	(777) %	(734) %	(777)	%
Gained	25	24	24	-1
Made no difference to me	27	43	44	+17
+/- balance out	8	2	2	-6
Lost	37	29	28	-9
No answer/don't know	4	2	2	-2
Net gain (Gained-Lost)	-12	-5	-4	+8

Source: MORI

- Those from beyond the M25 are significantly more likely to be positive about the scheme than those from Outer London: 30% say they have gained as a result of the scheme (compared to 21% in Outer London) (Figure 11.8).
- CCZ drivers are, however, significantly more likely to remain critical, 47% say they feel they have personally lost as a result of the scheme.

Figure 11.8. Inner London and beyond the M25: personal gain and loss

Overall, do you think you have **personally** gained or lost out as a result of the Scheme?



Statistically significant

Base: All Outer London and Beyond the M25 respondents

11.17. Personally affected: Expectations compared with experience

Again, when expectations and experience do not match, the majority are likely to report that the CCS has actually made no difference to them.

Table 11.8. Outer London and beyond the M25: Personal impact

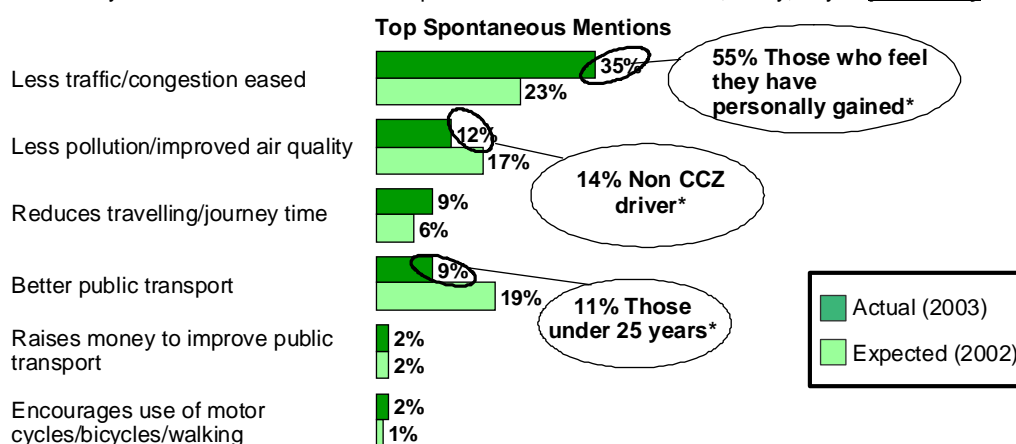
	Would gain (190)	Make no difference to me (209)	+/- would balance out (62)	Would lose (236)	Can't say at this time (30)	Total (777)
	%	%	%	%		
Gained (184)	12	5	2	3	1	24
Made no difference to me (344)	9	16	4	13	2	44
+/- balance out (18)	1	1	0	1	0	3
Lost (220)	2	5	2	19	1	28
No answer/DK (4)	*	*	0	1	0	1
Total (777)	24	27	8	37	4	100

11.18. Reasons for personal gain

The main positive effects of the scheme for respondents in Outer London and beyond the M25 are very similar to those expressed by respondents in Inner London and the CCZ. Key reasons are the ease in traffic congestion, followed by less pollution and reduction in travel time.

Figure 11.9. Outer London and beyond the M25: Positive effects of the CCS

What do you think are / will be the main positive effects of the scheme, if any, to you personally?



Base: All Outer London and Beyond the M25 respondents (777)

Statistically significant

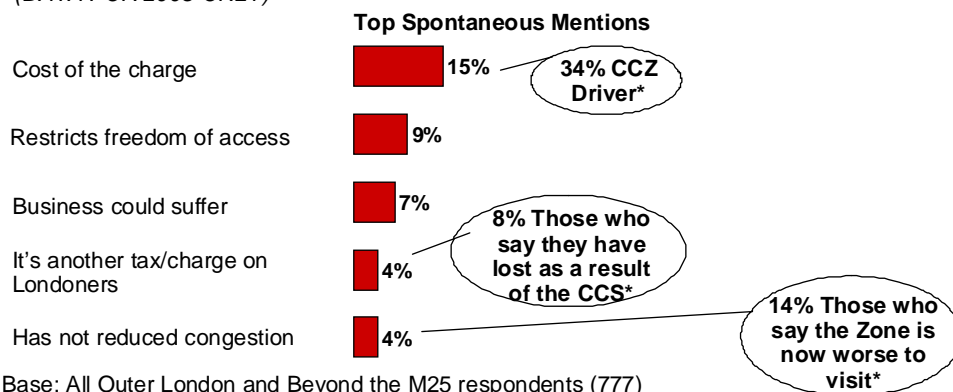
*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

11.19. Reasons for negative views

Reported negative effects of the scheme are broadly similar to those expressed by Inner London and CCZ respondents. Many mention the cost of the charge and the restrictions on freedom of access (Figure 11.10).

Figure 11.10. Outer London and beyond the M25: Negative effects of the ccs

What do you think are the main negative effects of the scheme, if any, to you personally?
(DATA FOR 2003 ONLY)



Base: All Outer London and Beyond the M25 respondents (777)

Statistically significant

*Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups

11.20. Household beneficiaries and losers : Expectation compared with experience

When Outer London and beyond the M25 respondents consider the impact the CCS has had on their household; a greater proportion report that the scheme has actually made no difference to their household, 66% now say this compared with 50% who expected this to be the case.

Table 11.9. Outer London and beyond the M25: Household impact

 (Base: All multi-person households)	Household would gain (89)	Make no difference to household (308)	+/- would balance out (23)	Household would lose (163)	Can't say (28)	Total (611)
	%	%	%	%	%	
Gained (65)	5	4	0	2	0	11
Made no difference to household (405)	8	39	3	14	3	66
+/- balance out (9)	0	0	0	1	0	1
Lost (126)	1	7	1	10	2	21
No answer/ DK (6)	0	0	0	0	0	0
Total (611)	15	50	4	27	5	100

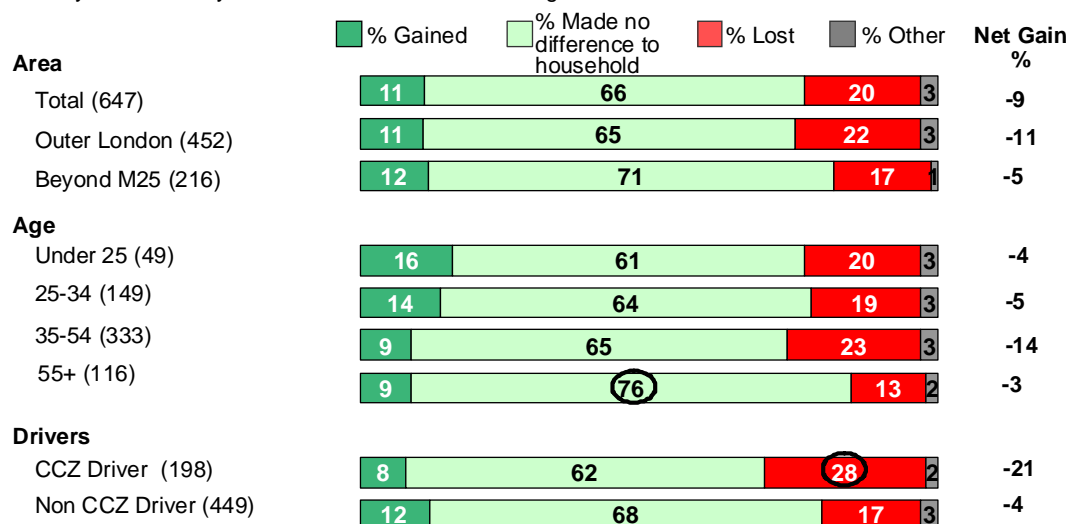
Source: MORI

While 27% expected their household to lose, less than half of these believe this to be the case.

- While those from beyond the M25 are most likely to be positive about the impact of the scheme at a household level, similar proportions say they have 'gained' at a household level as say they have lost.
- Those in the oldest age group of 55+ are significantly more likely to say the scheme has made no difference to their household in comparison to the other age groups. This is partly due to them being less likely to travel into central London
- CCZ drivers are again significantly more likely to say their household has lost as a result of the scheme.

Figure 11.11. Outer London and beyond the M25: Household gain and loss

Do you think that your **household** as a whole has gained or lost out as a result of the Scheme?



Statistically significant

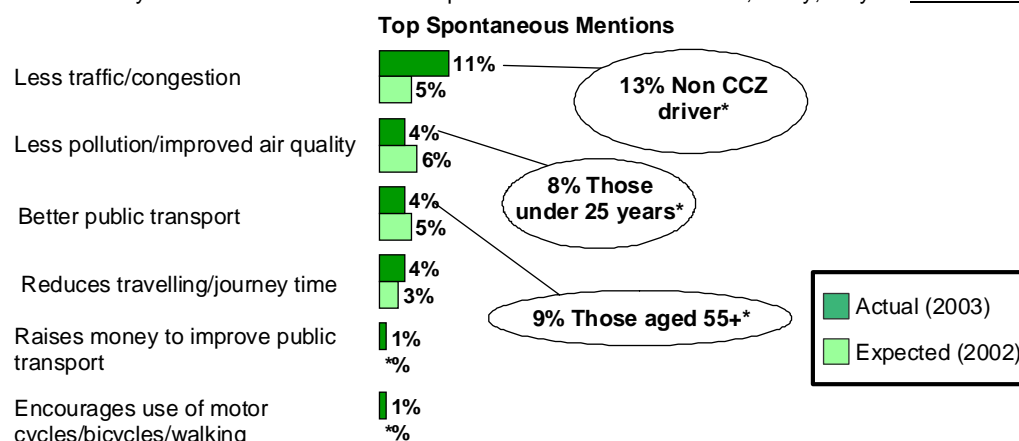
Base: All Outer London and Beyond the M25 multi-person households

11.21. Reasons for household gain and loss

Reasons given for household gain or loss are similar to those mentioned by respondents in the Inner London and the CCZ respondents. The ease in traffic congestion, air pollution and better public transport are the key factors cited (Figure 11.12.).

Figure 11.12. Outer London and beyond the M25: Positive effects of the CCS

What do you think are / will be the main positive effects of the scheme, if any, for your **household**?



Base: All Outer London and Beyond the M25 multi-person households (647)

Statistically significant

**Statistically significant subgroups have been highlighted for 2003; however the chart does not include all statistically significant subgroups*

The cost of the charge and restricted freedom mentioned as the main negative aspects of the scheme. This question was only asked in 2003; hence no comparison data has been included.

11.22. Household case studies

A series of case studies have been selected provide to give context of how the scheme has affected people's daily lives, within individual households. These demonstrate that:

- the impact of the scheme is often different for individuals in the same household
- some households are more interdependent than others regarding their transport needs (e.g. the actions of one have consequences for others)
- lifecourse and lifestyle are important for the sorts of things that people do and where they go, both individually and as a household.

The practical impact of the scheme is 'filtered' by all these considerations, as the following case studies illustrate.

1) The Mukhtabs: West End

The Mukhtabs do not own a vehicle and live in the West End, relying on walking and public transport to get around. They notice less and lorries now compared to before the introduction of the scheme but say there are now so many buses that these are a new type of congestion.

Aman Mukhtab is a shop assistant, working full time. His wife Fatima is studying and works part time. They live with Aman's father, Jaffur who no longer works and they have a household income under £20,000 per year. The Mukhtabs say their spending on travel is unchanged since last year.

Travel behaviour

Fatima visits friends and family three or four days a week and goes to buy food about the same number of times. She uses the bus or tube and living so centrally, is able to walk for most of her essential journeys, such as to college. The introduction of the charging scheme has not affected the number of journeys she makes. The predictability, stress, comfort and time spent waiting for a bus for her journey to college are all unaffected by the scheme, though she feels pedestrian crowding on the streets is a little worse. Fatima feels public transport is now better but hasn't noticed a real change in traffic congestion.

Aman walks to work from home. Most of Aman's journeys are made on foot and the scheme has had no impact on the frequency of his regular journeys or the amount of time they take. He occasionally uses the tube, buses and trains. He feels the ease and access of his travel options are unchanged. He visits the hospital at least once a month as he is in poor health. He uses a variety of methods of transport for this journey and is uncertain about whether it has improved since the scheme was introduced.

Jaffur walks almost everywhere. The only other form of transport he uses is the bus. He feels most aspects of his leisure journeys, both inside and outside of the zone are unchanged, though he feels public transport is now a little better, as he expected it would be.

General Observations

All three members of the Mukhtab household feel their area as a whole is better since the congestion charge was introduced, although they also note that the scheme has had no effect on their household.

For Fatima, this is because there are fewer cars, more buses and less pollution. She does qualify this though, saying the number of buses, and especially the new 'bendy buses', are creating a new type of congestion, so they cancel out some of the good effects of the congestion charge.

Jaffur says the congestion charge has led to less traffic and notably less noise from cars and lorries in the area where they live. The other key improvements he mentions are reductions in congestion and availability of public transport. He does feel however, that Oxford Street is now so crowded with buses that congestion there is actually worse than before.

Aman Mukhtab feels the congestion charge has been very effective. He has noticed fewer cars but says the streets are more crowded.

2) The Kwame's - Peckham

Lydia and Roger Kwame are married with two children of school age. Lydia is a health service manager and Roger is an engineer, who regularly works unsocial hours. Their household uses more than three vehicles. He says the money is hard to find and comes out of his wages, but he has not had to cut costs elsewhere to pay it. Lydia notes there is now less money for the family. The Kwame's live outside the zone in Peckham but one of their children goes to school within the zone. Roger Kwame drives into the zone during charging hours to take their daughter to school. He estimates the charge has cost them over £800 as of December 2003, which they can ill afford.

Travel behaviour

Lydia and Roger commute to work by car separately, as well as use the cars regularly for other journeys. They also use buses, but avoid the tube or other methods of transport. Roger drives the children to and from school, and believes access to the zone is a little worse than it used to be.

He feels crowding, stress and safety are all a little worse now, although he does not say his journey takes him any longer. He says he has not altered the frequency with which he drives into Central London, and knows he has to swallow the extra cost as a necessity.

Lydia used to commute to work by bus, but now drives, as she recently passed her driving test. Her journey does not take her through the zone. She finds travelling by car more comfortable than taking the bus, though not necessarily any quicker or easier.

Lydia doesn't travel within the zone and says the introduction of the charge has barely affected her in terms of frequency or destination. They continue to meet with friends and family as often as before.

General Observations

Lydia and Roger do not feel the congestion charge has greatly affected the area where they live, though Roger says that it is harder to park in the area around the local train station. Roger thinks the congestion charge is an unnecessary waste of his money which he has to pay to take their child to school.

3) The Khans - Holborn

Meena and Samir Khan have a son, Suliman who a student and two younger children in the house. The family have one car. Samir is a chef who runs his own restaurant, while Meena stays at home and looks after their children. The Khans live in Holborn and have a relatively low income and do not see any tangible benefits from the congestion charge. This is in part due to problems they have experienced registering a new vehicle and as yet have not obtained a residents' discount for the scheme.

Mr Khan bought a new car recently and says he is unable to get it registered for the residents' scheme because he has no log book. As a result he has been paying the full congestion charge recently, and is very unhappy about this since he resides within the zone and knows he is eligible for discount.

Mr Khan says he has paid £75 in total since the introduction of the scheme. This money comes from his household's budget and the family find it difficult to meet. He feels this is money being paid for 'nothing', especially since congestion has not been reduced.

Travel behaviour

Samir gets a lift to work and uses his own car mainly to visit friends and family. He feels that those who drive him around also use their cars less now within the zone.

Samir reports no change in traffic congestion, public transport or his overall travel experience to work. He had expected to see an improvement in congestion and feels disappointed that this has not happened.

Meena Khan walks their younger children to/from school five days a week and says there has been no change to these journeys since the charge was implemented. When questioned about the different aspects of her journey, such as crowding, safety and noise, she reiterates that there has been no change.

The Khan's oldest son Suliman walks to college on a regular basis. He feels there is no change to his journey and he has to wait for the same amount of time to cross the roads. When asked about public transport, Suliman says he feels it is a little worse than it used to be. Most of Suliman's journeys are unaffected by the congestion charge, though he does say he now gets somewhat fewer lifts from other people. Suliman also mentions that his father finds it harder to visit his grandfather, who is currently in hospital. He says this is because of the congestion charge. Suliman will finish college and wants to buy a scooter in the next 12 months, and says these changes are in response to the congestion charge.

Mr Khan says they make fewer journeys within the zone since it was introduced, and that this is due to the charge. For journeys such as taking the children to school, shopping or leisure, the Khan's walk. Though Mr Khan reports making fewer journeys by car, he doesn't feel he has any worse access to facilities inside or outside of the zone and does not initially complain that it is any harder to visit family and friends or vice versa. Upon further consideration, he said he does feel that he now sees less of his family and friends and the scheme is partly responsible.

Meena also feels the family pay 'money for nothing' and is disappointed that expected changes have not occurred. She agrees with her husband that they make and receive fewer visits to friends and family now, though says all other journeys are unaffected.

General Observations

Samir Khan doesn't feel there have been changes to any environmental factors, such as pollution, noise, congestion or trade since the congestion charge was introduced. He does not feel the charge has been effective and is very unhappy with having to find extra money to meet the costs, when he sees no benefits.

Meena also feels there has been no substantive change to the area in which they live since the introduction of the charge and resents the amount they have to pay. She also sees the scheme as money they have to pay out with nothing in return.

Suliman Khan agrees with his parents that the scheme has made little difference to the area or to traffic levels.

4) The Hornes - Peckham

Paul is a university lecturer and Jeanette is a voluntary worker with a disability. They have one car. Jeanette believes that the charging scheme has affected wealthier people less, because it is easier for them to meet the charge. She feels the less wealthy are overly penalised by the charge. Both Paul and Jeanette have bus passes, and now do not drive in the zone during charging hours, so they have personally have seen some saving in costs, because they make use of their free access to public transport. Paul and Jeanette Horne have some very strong opinions about the congestion charge. Active in their community in Peckham and politically aware, they now refuse to drive their car into the zone during charging hours. Paul says he works longer hours to avoid busy periods, because he feels public transport is also more crowded.

Travel behaviour

Overall Jeanette makes fewer journeys into the zone now, but says this is not solely due to the charge, but also due to the high cost of parking. When she does travel into the zone, she is now more likely to use the bus rather than take the car. She feels she has the same access to shops and facilities in Central London as she had previously, but that access to these things in her local area is somewhat worse because of the increased congestion there.

Paul now drives into the zone only for business trips. For other journeys into the zone he is now more likely to take the bus than before, although his bus journeys are much worse than they used to be as they are more crowded and stressful. Paul resents using the bus and feels it is inconvenient and uncomfortable. The time he loses when he takes the bus is very important to him, but he knew he was going to lose it when the scheme was introduced.

He does not like carrying heavy items on buses and plans to shop on-line more in the future. He now spends more time working so that he can schedule his time to avoid busy travel periods. He feels his access to the zone is a lot worse than it used to be and it is more difficult to get to services and facilities in Central London. Having worked late, he now has more answer phone messages to attend to when he gets home which eats into his leisure time.

Jeanette also mentions that access to friends and family is worse than it was before, explaining that she and Paul now have to work out a route which avoids the zone and this takes more planning before they make such a journey. Their family and friends who visit them feel similarly affected. As a result, they see less of them than they used to, unless they live in South East London and do not have to negotiate the zone.

General Observations

Jeanette and Paul feel the area they live in has become worse since the scheme was introduced. Jeanette says this is because people now wish to avoid driving into Central London when the charge is in operation and have switched to buses, resulting in buses becoming more crowded and 'bottle necking'.

Jeanette feels there is improved availability and reliability of public transport, but that it is harder to cross the roads and there is less parking. Other factors in her local area, such as pollution, congestion and noise have not changed.

Paul Horne feels that though public transport is now better in his area, it is no more reliable and pollution, congestion, noise and parking are worse.

Paul says his impression is that areas nearer the zone are experiencing greater congestion as drivers try to park close to the edge of the zone. He has issues about traffic calming, saying the use of it is excessive and that the traffic avoiding the zone is causing a loss of parking spaces.

Jeanette feels strongly that the charge disproportionately penalises the less wealthy and she is disappointed that the new buses are not environmentally friendly. She adds that so many buses are creating congestion and pollution problems of their own. She says that the scheme limits spontaneity and the ability to act in an emergency.

Jeanette and Paul are very involved in their local community and feel that though they live outside the zone, the charge has had a negative impact on businesses in the Dulwich area where they live, with a loss of passing trade.

5) The Stantons - Hoxton

Vera and George Stanton are both retired and living on state pensions. They live outside the zone in Hoxton and have access to their grown up daughters' two cars which they now use less frequently because of the scheme. They believe the scheme has not met their expectations *'I feel disappointed. The way they explained it, I expected to sail through Central London, but this hasn't happened.'*

Travel behaviour

The Stantons do most things together. The majority of their journeys are to visit people, for shopping or leisure activities or for services and health reasons. Since the introduction of the congestion charge, they make fewer journeys into the charging zone and have switched from borrowing their daughters' cars to taking mainly the bus and occasionally the tube. They attribute their increased use of buses directly to the scheme, using their Freedom passes rather than the car.

George and Vera feel their access to Central London is slightly more limited than it used to be and it is a little more difficult to get to the zone. Both say it's more difficult for them to visit family and friends because they tend to take the bus and there are 'too many traffic lights' and takes a long time. While George points to people 'unloading vehicles in the bus lanes', Vera says there are 'too many road works'. They feel it's now harder for people to visit them because of difficulty with finding parking spaces.

The couple travelled by bus in to Central London for shopping both before and after the scheme was introduced. They feel that traffic congestion, public transport and their overall travel experience has become worse in the last year. Neither expected this to be the case. When asked to explain further, their complaints largely centre on non-congestion charge related issues, such as bus drivers failing to stop at bus stops and buses being unreliable.

General Observations

The Stantons do not feel their area has changed much due to the introduction of the congestion charge although both believe that congestion, pollution and availability of parking is now worse locally. They don't know if or how local business has been affected. The Stantons believe the scheme has been fairly effective in reducing congestion.

George is unhappy about the number of speed bumps and the noise from vehicles travelling over them. His complaints about increased traffic noise relate more to speed bumps than to the charging scheme.

George feels more people now use public transport, especially the tube, since the introduction of the congestion charge, and it's too crowded. Vera says the politicians' speeches made her expect to 'sail through Oxford Street' when the scheme was first introduced, but this hasn't happened.

The Stantons feel the charging scheme has had a big effect on them. They have less time at home, for leisure and entertainment and with friends and family, and believe the scheme is partly responsible. They do not see any positive effects of the scheme. George says he can't now 'go anywhere' in his daughter's car and he struggles with heavy shopping on public transport. Vera says journeys take longer by bus and it's an uncomfortable experience because of overcrowding.

6) The Singhs - Holborn

The Singhs are a low income BME household living within the zone for whom their annual charge has been difficult to afford. They are planning to move to outside the zone as a direct consequence of the scheme.

Mandeep Singh is a catering worker though he has been unemployed at times in the last year. His wife Salima is a full time housewife and mother. Their household income is under £10,000 per year. They have two children of primary school age. They have a car and live inside the zone in EC1 so qualify for a resident's discount to the scheme.

Travel behaviour

Because the Singhs live inside the zone, they have to pay £126 a year for what they see as parking their vehicle, or for 'nothing' as Mr Singh puts it. To make matters worse, it has also got harder to park their vehicle.

The Singhs say they find it extremely difficult to meet the annual cost of the congestion charge. Mandeep says they have had to cut down on shopping bills in order to find the extra cash.

Mandeep's main method of transport is the car, which he uses to get to work (outside London). Salima, whose English is limited, generally walks everywhere and only occasionally takes the tube or buses. The scheme has not made a difference to the number of journeys either of the Singhs make in the zone, or the method of transport they use, though this is partly because they live within it so have little choice.

Mandeep works shifts and often has to leave home during congestion charging hours, returning late at night. The scheme is particularly painful for him because he drives straight out of the zone and is usually unable to get 'value for money' by making repeat journeys on the same day into the zone during charging hours.

Salima walks the children to school every day, just as she did before the introduction of the scheme. She does not feel there has been any change to her overall travel experience, congestion, road safety or crowding.

Though the Singh's do not think it is more difficult for them to visit others, they do say it is harder for family and friends to visit them, and ascribe this directly to the £5 charge they have to pay in order to travel to see them. As a result they say they see relatives less often since the scheme was introduced.

As a low income household, the Singh's can't afford too many leisure activities, and say there has been no change in the amount they undertake since the introduction of the scheme.

General Observations

Before the introduction of the scheme, Mandeep and Salima thought it was going to be extremely difficult to pay and could not see any potential benefits to their household, and this has now been borne out in reality.

The Singh's do not feel congestion, pollution, noise or road safety has improved as a result of the charge. They have made no changes to the time they allow for journeys and do not feel their trips are less stressful or easier. They say their total spending on travelling is about the same as before the scheme was introduced, but they see the Charge as increase in the amount they spend on parking. Both feel the scheme has affected them to 'a fair extent'. They are unhappy about paying £126 a year, seeing it as a tax for simply living within the zone.

The main social difference the charging zone has made to the Singh's lives is that they see their family less. They plan to move out of the zone in the next year, and say this is in response to the introduction of the scheme.

7) The Levins – Kensington

Hannah and William Levin have one child of pre-school age and live in South Kensington, outside of the current charging zone but within the proposed area of congestion zone expansion. Both work full time running their own businesses. Their annual household income is between £35k and £40k. They own one car. Both run their own businesses, with William now travelling for work into the zone by tube rather than car. Hannah still uses her car for business but avoids working in the zone if she can. It is not only the charge, but also the 'complications' of paying it that deter her from travelling into the zone during charging hours. She now shops far less frequently in the West End.

'We have less freedom of choice about travelling into the West End.'

Travel behaviour

Both Hannah and William say they make fewer journeys into the zone since the scheme was introduced. They say this is partly because of the cost of the scheme, but also because of the 'complications' of having to pay it. Hannah has actively made changes to her working patterns and says this is due to the scheme.

She now makes fewer journeys to work, and when she does, she uses the tube. She adds that she has had to turn down work if it is within the charging zone.

William still travels into the zone for work during charging hours, but says he now travels by tube rather than driving because he finds it more convenient. His journey takes him the same amount of time as it did before.

The Levins both feel their access to services and shops in the zone is worse than before, William a little more strongly than Hannah. They don't feel the charge has had an impact on the frequency of their visits to or from friends and family but they do say they avoid arranging meetings within the charging area.

Hannah says she now makes more journeys for food shopping and leisure activities, although she has not made any changes to her travel arrangements for these journeys. She says she used to love shopping at West End stores like Selfridges but now has to get goods delivered since there is less choice locally. She also now shops on the internet more often.

General Observations

The Levins say the scheme has been very effective in reducing congestion within the charging scheme zone. Despite William switching from driving to work to using the tube, William doesn't feel the charge has had any impact on most aspects of his journey, such as the time it takes or the stress and hassle.

Hannah feels the effects of the scheme more than William, saying she now spends more time travelling. She doesn't want to travel into the zone because she doesn't want to pay the congestion charge and is concerned about being fined for forgetting to pay. She also feels parking charges have gone up within the zone.

Living just outside of the current zone, Hannah says most people she knows now avoid going into town and shop locally instead. As a result, both she and William feel the congestion charge has been good for businesses in the area where they live. They feel that availability of parking and reliability of public transport has got worse and William now also finds it harder to cross the roads locally.

On balance, William thinks both he and his household have lost out because of the charging scheme because he doesn't have the same 'freedom of choice' in travelling to the West End and because Hannah spends 'more time travelling and has problems shopping'.

8) The Gallaghers – Borough

Since the implementation of the scheme, Mary has given up driving her car during charging hours to let her husband have the single resident discount they are eligible, living in the zone. This means Mary now walks rather than drives. ***Only being allowed one residents' vehicle discount means I have to walk to work while my husband uses the car.***

Tom Gallagher is a lorry driver and his wife Mary is a child minder. They have one child living with them, daughter Mandy, who is a full time student.

The main change Tom mentions is that they now pay the annual residents charge of £126 a year so his expenditure on travel has increased (by £10 per month). He feels this is quite affordable. By contrast, his wife Mary says they find it difficult to meet the charge and that it has meant they have had to cut costs elsewhere.

Tom does say that on balance his household has lost out because of the congestion charge since they now have to pay the annual residents' fee and Mary thinks residents living within the zone should be exempt from the charge.

Mandy says the charging scheme makes no difference to her.

Travel behaviour

All three members of the Gallagher household say their key journeys (to/for work or college) are unchanged in terms of distance and frequency. Tom and Mary prefer to drive to work. However, since the Gallaghers can only get a residents' discount for one vehicle, Mary now must walk to work while her husband continues to use their family car for his work. They planned this when they first heard the charge was to be introduced.

Mary feels walking is more of a hassle, less comfortable and not as easy as driving. Her walk is 15 minutes long and takes her an extra 10 minutes. She doesn't feel the time lost is very important, though it does mean she has to get up a little earlier than she used to.

Tom believes the duration of his journeys to work are largely unaffected by the congestion charge, though he says if anything they are a little quicker.

Mandy Gallagher continues to take the bus to college and says her regular journey has been unaffected by the congestion charge.

Apart from her journeys to work, Mary has also made some changes to her travel arrangements. One of these is that her husband now has to make sure he has the car available for her to go food shopping. The other is that she now gets less time at home, although she doesn't think this matters a great deal.

Lorry driver Tom and student daughter Mandy says the charge has made little or no difference to their travel outside work either.

General Observations

Tom doesn't think the charge has reduced congestion, Mary says it has been 'fairly effective' and Mandy says she doesn't know how effective it has been.

The only charging scheme effect on the local community Tom Gallagher mentions is that some local shops have closed since the charge.

As a child minder working within the zone, Mary says that many of the children she looks after now have to walk to nursery and this is sometimes hard for them, especially if it's raining or cold.

Mandy thinks traffic congestion, public transport, crowding, time spent waiting and her overall public transport are unchanged since the Charge came into being. She also says there's no difference in the amount she has to spend on travel. In fact, Mandy says the congestion charge has made no difference to her life at all.

9) The Thornes- Bowes Park

Civil servants, Michael and Sarah Thorne do not own a car and both take the tube to get to work in Central London. Both feel their household is largely unaffected by the congestion charge, though they say there is a noticeable reduction in traffic, congestion and fumes in the area where they work.

Sarah Thorne and Michael Copse are both Civil Servants working in Central London. They live in the Bowes Park area of North London, outside the zone. Sarah has a son of school age who lives with them.

Michael and Sarah fall into a high income bracket and do not mention charging scheme costs as a factor affecting them.

Travel behaviour

Michael has made no changes to his travel arrangements since the scheme came into being and still takes the tube into work. He believes he now has better access to Central London and it is a little easier to get to the zone than it used to be. He says that there is noticeably less traffic congestion, so that his walk from the tube to work is now more pleasant, less polluted and feels safer, in terms of traffic.

Sarah walks her son to school in the area where they live. She feels she has experienced worse traffic congestion and public transport on this 15 minute journey in the area where they live in the last year. She says the fumes and traffic are a danger to her son.

Like Michael, Sarah feels Central London, the area where she works, is a little easier to get to and the environment there is more pleasant, with less traffic.

The congestion charge has not affected the frequency or ease of Michael's travel for leisure activities.

In the last year, Sarah has taken more frequent bus trips out with her son. She says it's a quicker way to get around than walking or getting a lift with someone and she likes her son gaining the experience of travelling on a bus.

The congestion charge has not affected the ease or frequency with which their families and friends visit them and vice versa.

General Observations

Michael feels most aspects of the area he and Sarah live in are unchanged since the advent of the charging scheme. He believes the Charge has been fairly effective in reducing congestion. He says overall, he has gained from the Charge because the drop in traffic in Central London makes it easier to cross the road in the place where he works and means there's less pollution.

Sarah feels the area they live in has become more congested and noisy and that the standard of public transport has declined in the last year. It is also harder to cross the roads, which is an issue for Sarah because she walks her son to school.

Sarah also makes the observation that she thinks the M25 is more crowded following the congestion charge and that the tubes are busier.