

**Congestion Relief Pilot –
Waterloo station**

Job Number: 11053

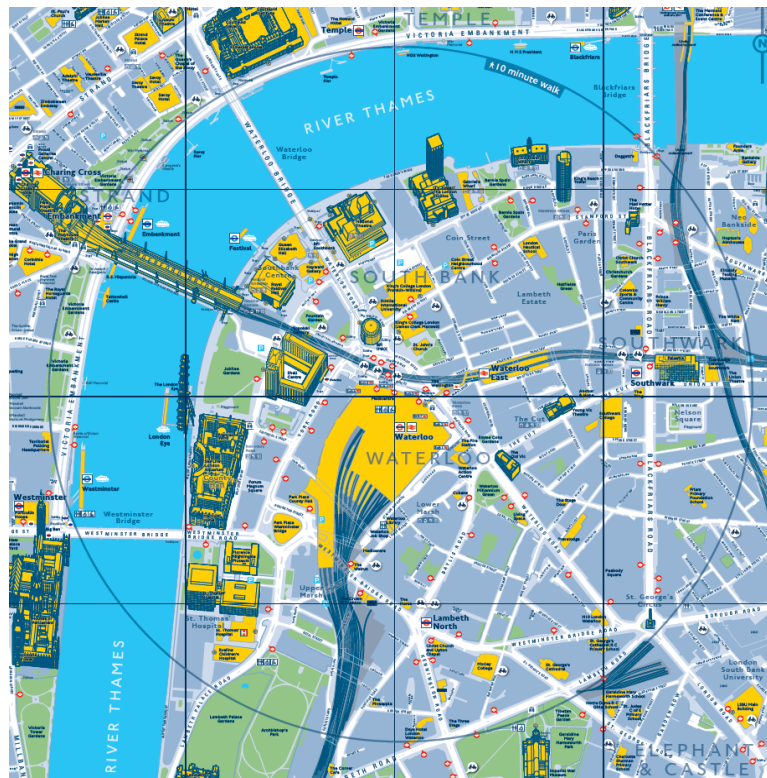
October 2011

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- Research methodology
- Campaign recognition
- Travel behaviour
- Attitudes
- Leaflet content
- Summary
- Implications



- **Methodology:** Hybrid, combining face-to-face and online
- **Research timing:** One wave of research only, post initiative

Face-to-Face:	30 th Sept 2011 – 13 th Oct 2011
Online:	29 th Sept 2011 – 11 th Oct 2011

- **Sample:** Peak time (7-10am & 4-7pm) users of rail services at Waterloo station who make a potentially walkable journey to or from Waterloo station. A potentially walkable journey is a journey to/from a point within 2km/20minutes walk of Waterloo station.

Those who only ever walk both onward from and return journeys to Waterloo in the last six months are excluded.

Total no. of completed interviews: 782 (target was 400-500)
Face-to-Face sample: n=464 (target was 250-300)
Online sample: n=318 (target was 150-200)



Campaign Recognition

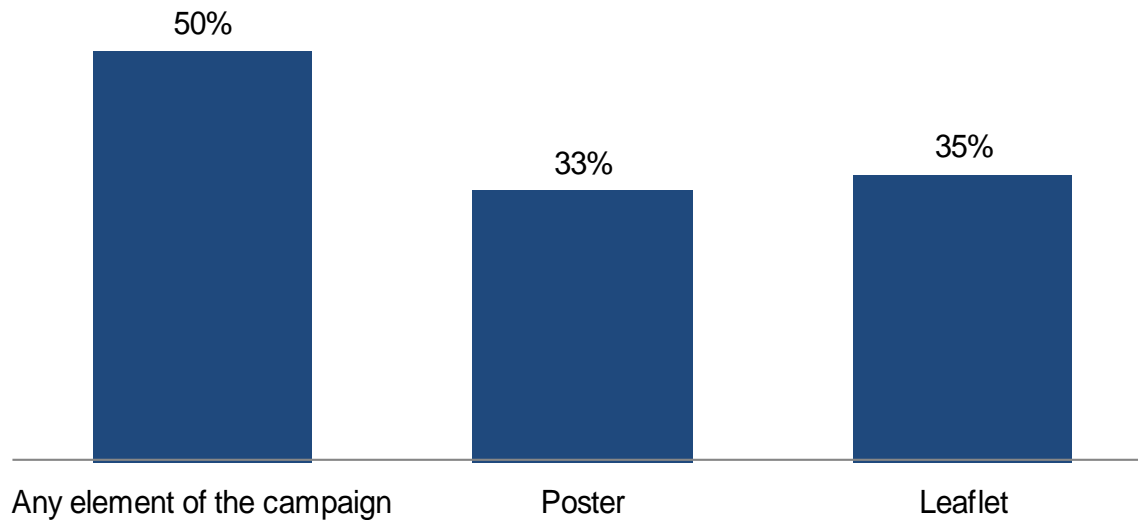
Campaign recognition

One half of respondents recognised the campaign, with the leaflet and posters having a similar level of cut through.

Q8: Have you seen any of these **posters** before?

Q9: Have you seen this **leaflet** before?

Yes %



Base: All respondents (782)

Campaign recognition

The leaflet and the posters are reaching different people to a certain extent with each extending the reach by about one third.

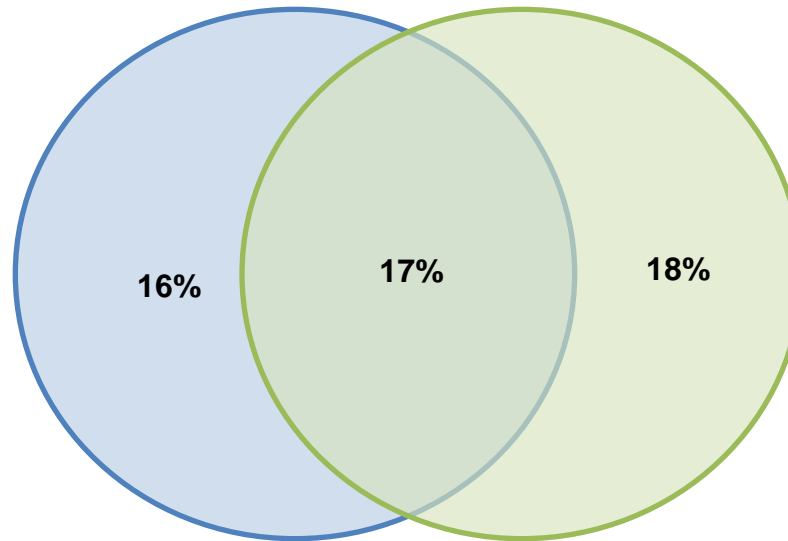
Q8: Have you seen any of these **posters** before?

Q9: Have you seen this **leaflet** before?

Seen any poster
33%



Seen any element of
campaign
50%



Seen Leaflet
35%

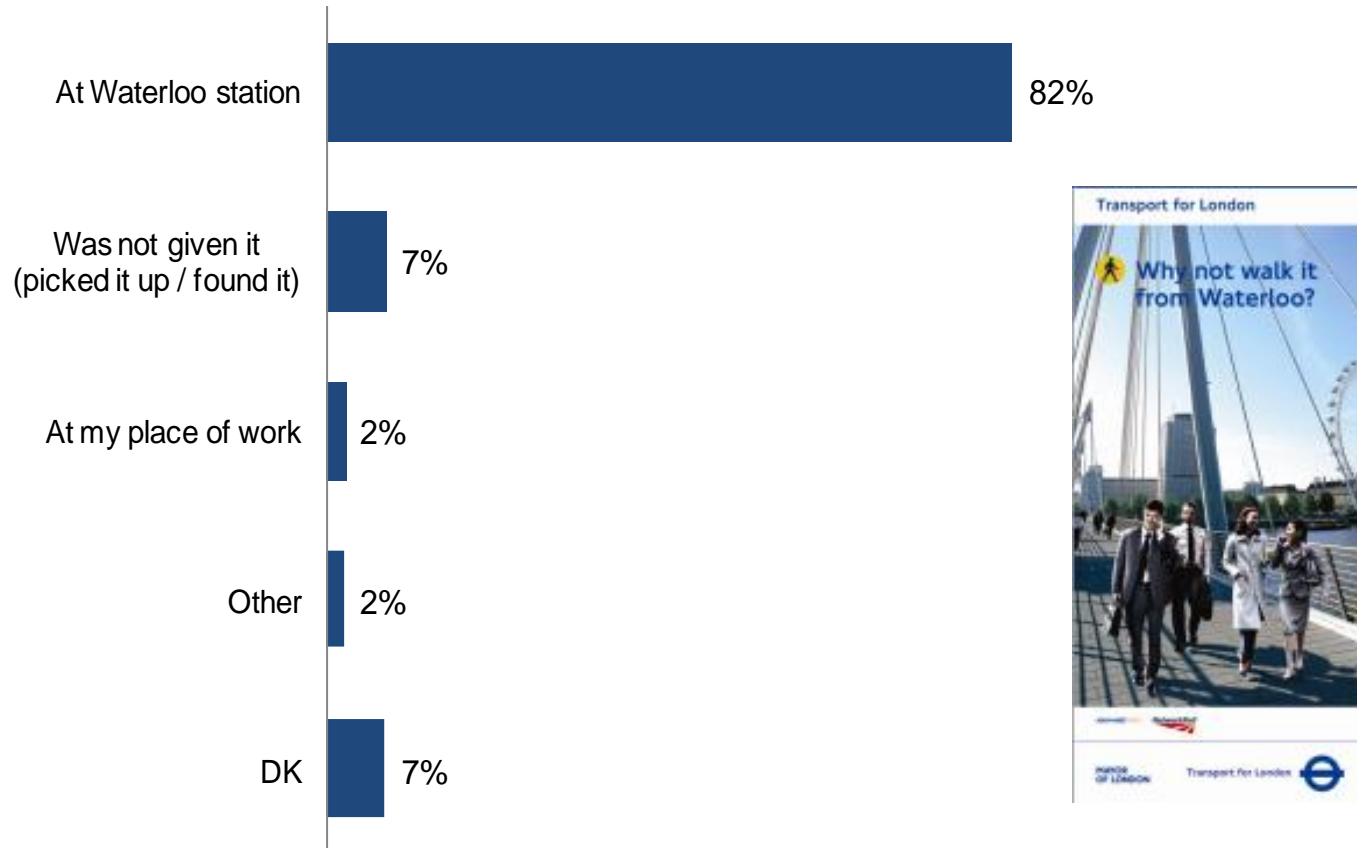


Base: All respondents (782)

Source of leaflet

Over eight in ten of those who have seen the leaflet were given it at Waterloo Station.

Q9b: Where were you given the leaflet?



Base: Those who recognise the leaflet (56)

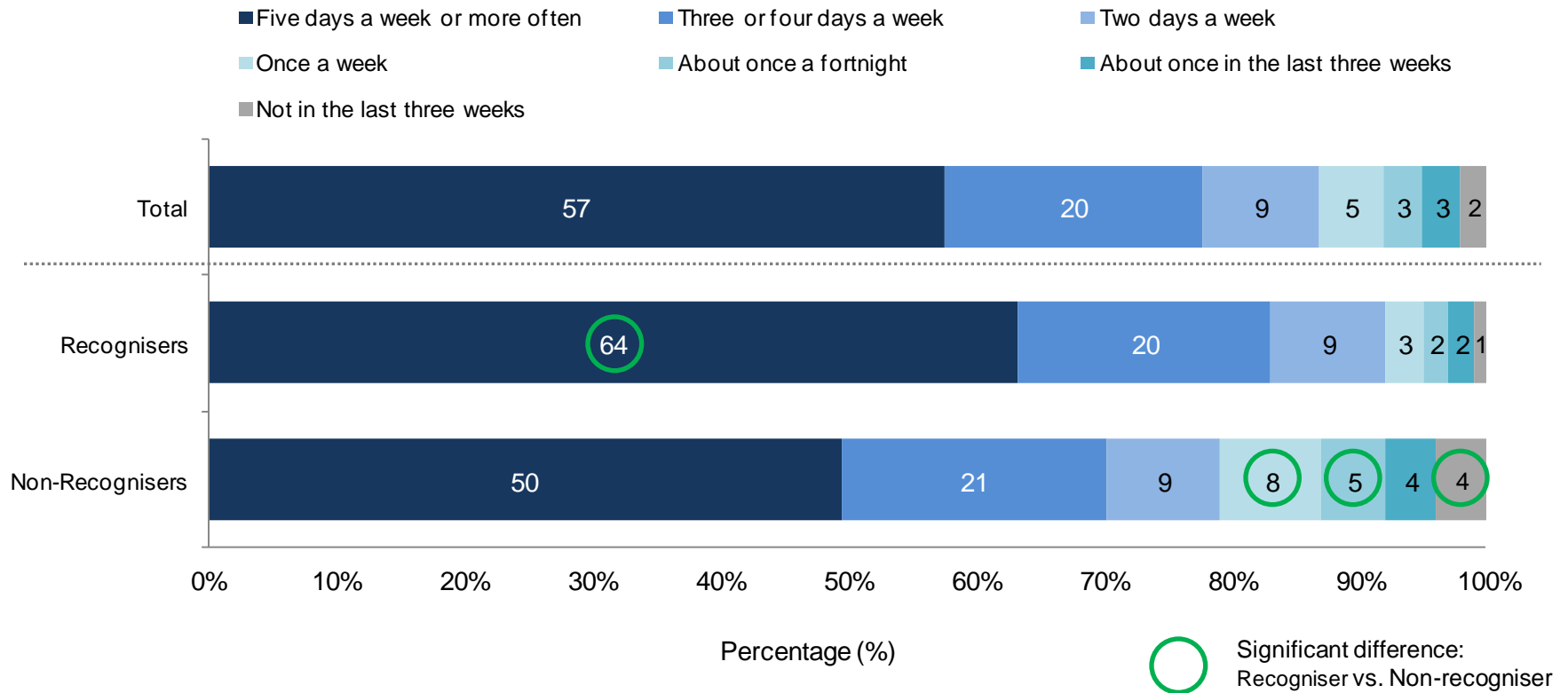
NOTE this question was asked only of those who completed survey F2F, and this question was added half way through fieldwork.

Behaviour

Frequency of travel to Waterloo Station

Over one half of respondents travel into Waterloo station 'five days a week or more often'. Those who recognise the campaign are significantly more likely than non-recognisers to be very frequent users.

Q1: Thinking now about the last **three weeks**, how often, typically, did you travel in to Waterloo station?



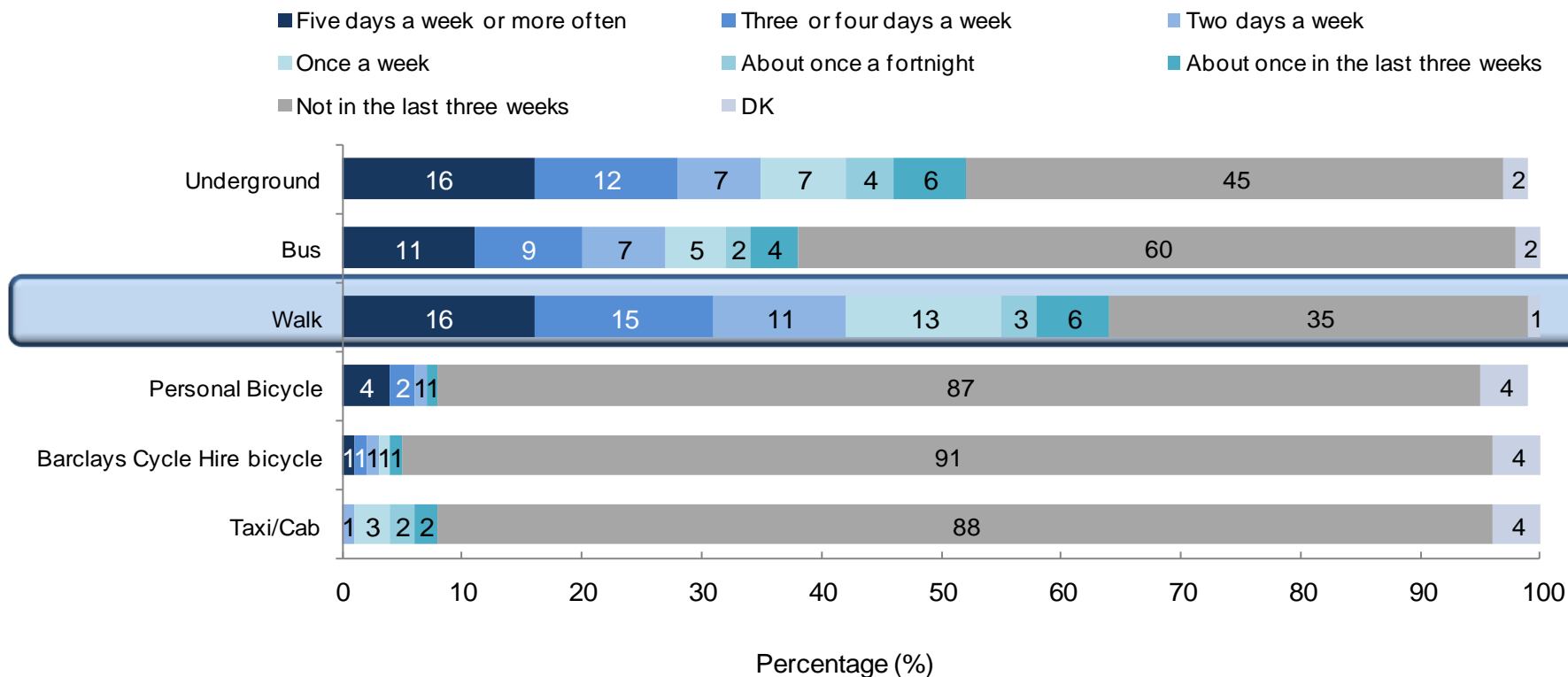
Base: All respondents (782), Recogniser (394), Non-recogniser (388)

Current frequency of usage – into/out of Waterloo

Walking is currently the most commonly used form of transport to get within a 2km radius of Waterloo followed by the Underground.

Q2: Thinking about the last three weeks, how often, typically, did you use each of the following modes of transport for your **onward journey** from Waterloo station to a destination within 2km?

Q3: Thinking about the last three weeks, how often, typically, did you use each of the following modes of transport for your **return journey** to Waterloo station from a destination within 2km?



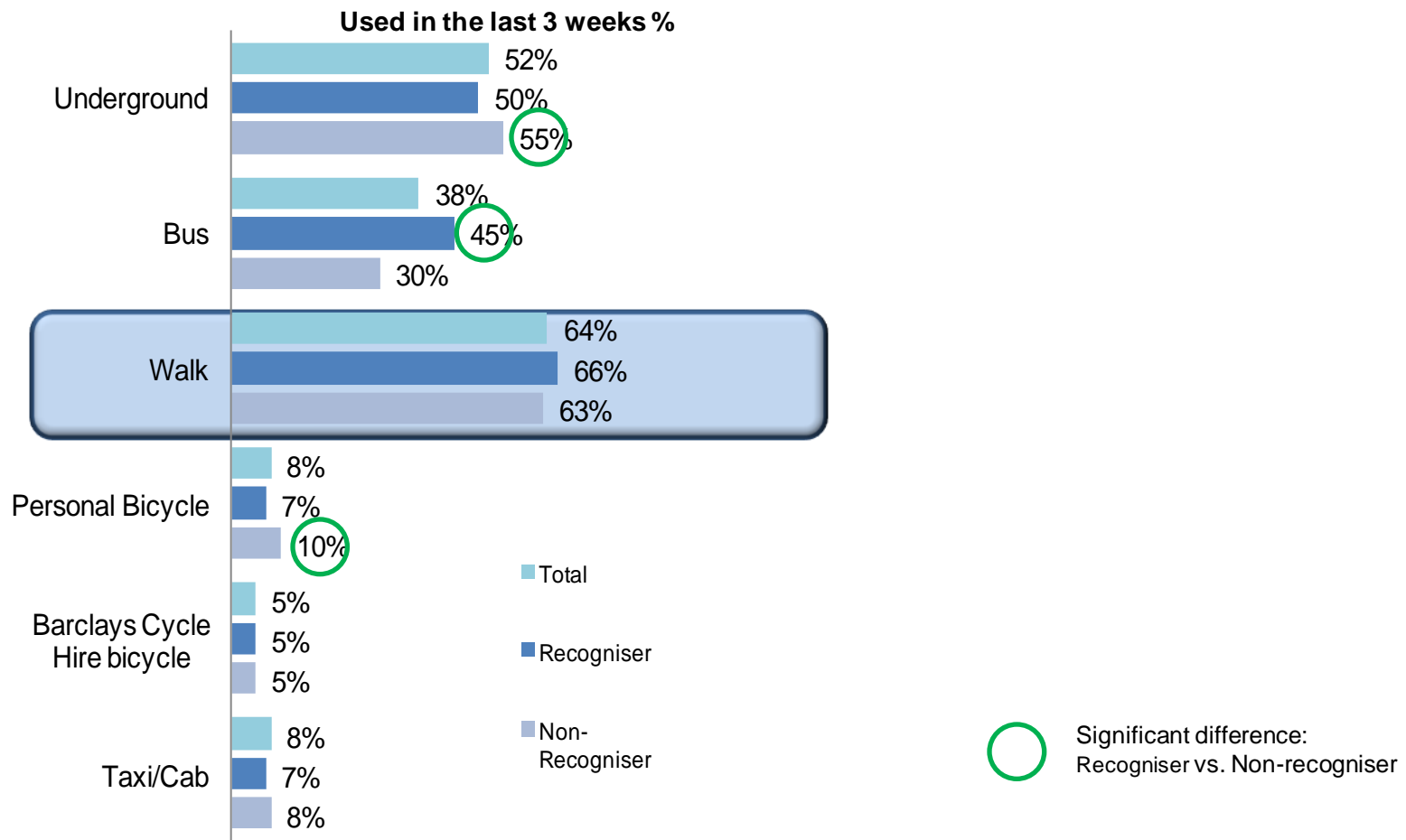
Base: Responses to Q2 and Q3 (1564)

Current freq of usage – into/out of Waterloo – Recognisers vs. Nons

Current frequency of walking does not vary significantly by recognition of the campaign.

Q2: Thinking about the last three weeks, how often, typically, did you use each of the following modes of transport for your **onward journey** from Waterloo station to a destination within 2km?

Q3: Thinking about the last three weeks, how often, typically, did you use each of the following modes of transport for your **return journey** to Waterloo station from a destination within 2km?



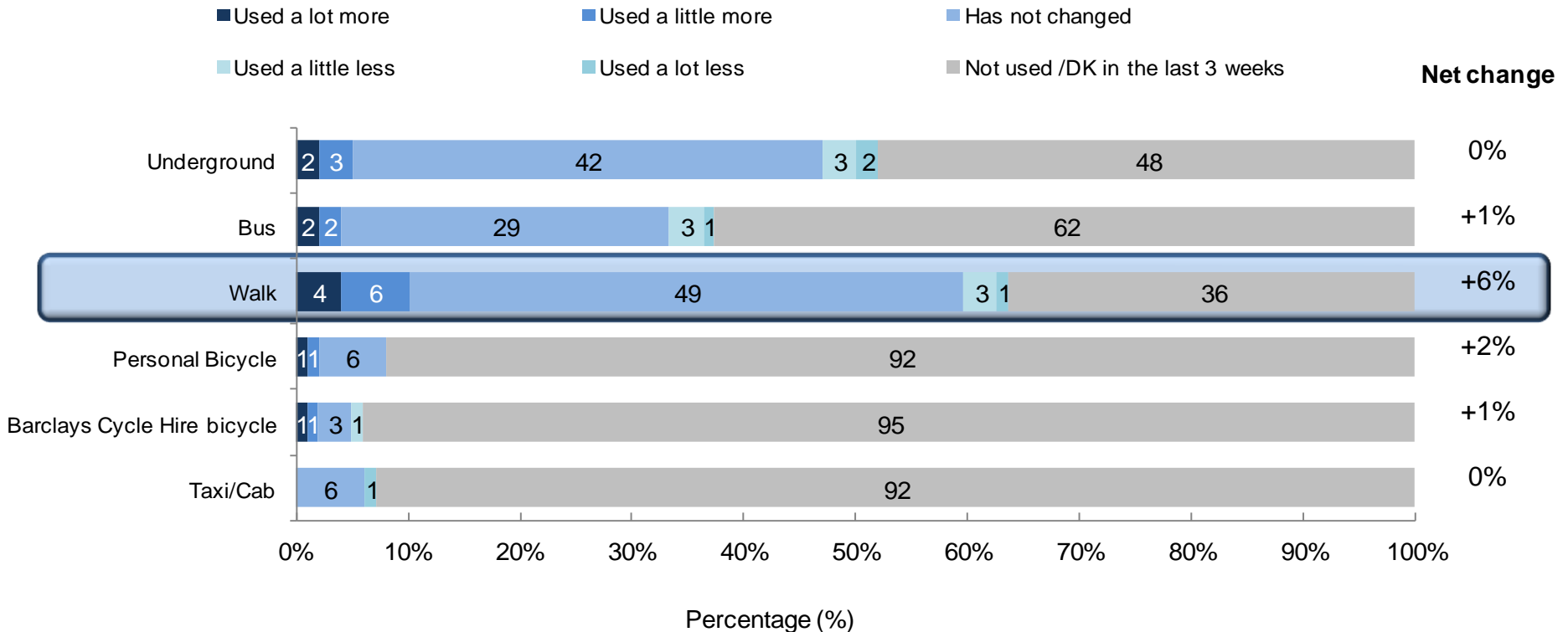
Base: Responses to Q2 and Q3 (1564), Recogniser (788), Non-recogniser (776)

Behaviour Change – into/out of Waterloo

In terms of claimed behaviour, there has been a net increase of 6% for walking for journeys to and from Waterloo. This level of change is higher than seen for other modes.

Q4: Now think only about your **onward journey** from Waterloo station to destinations within the previous map. How has your usage of each modes of transport changed over the past month?

Q5: Now think only about your **return journey** to Waterloo station to destinations within the previous map. How has your usage of each modes of transport changed over the past month?



Note: where discrepancies appear between the net change figure and figures in the chart, this is due to rounding

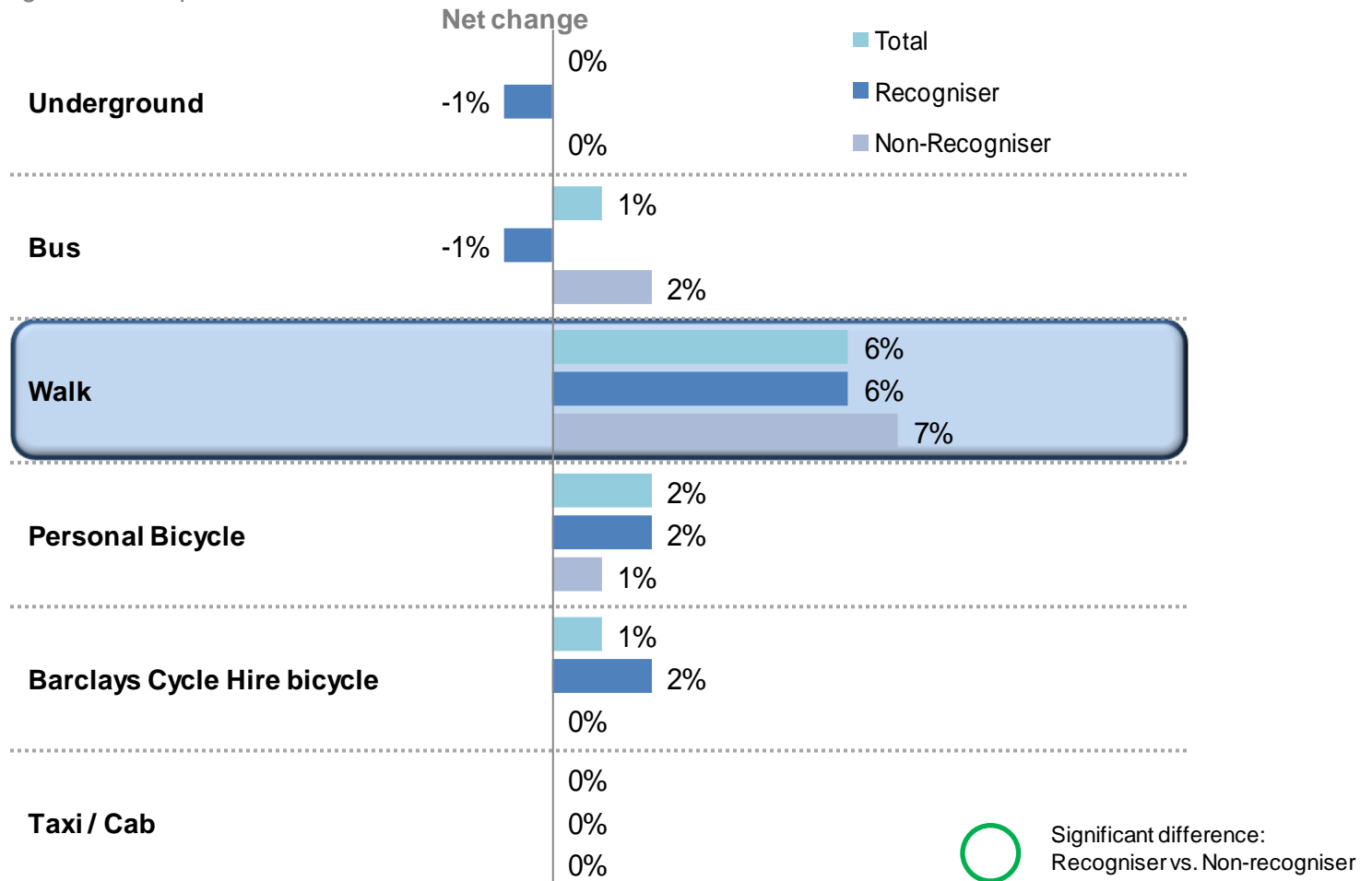
Base: Responses to Q4 and Q5 (1564)

Behaviour Change – into/out of Waterloo

There is no statistically significant difference in claimed change to walking behaviour by recognition of the campaign.

Q4: Now think only about your **onward journey** from Waterloo station to destinations within the previous map. How has your usage of each modes of transport changed over the past month?

Q5: Now think only about your **return journey** from Waterloo station to destinations within the previous map. How has your usage of each modes of transport changed over the past month?

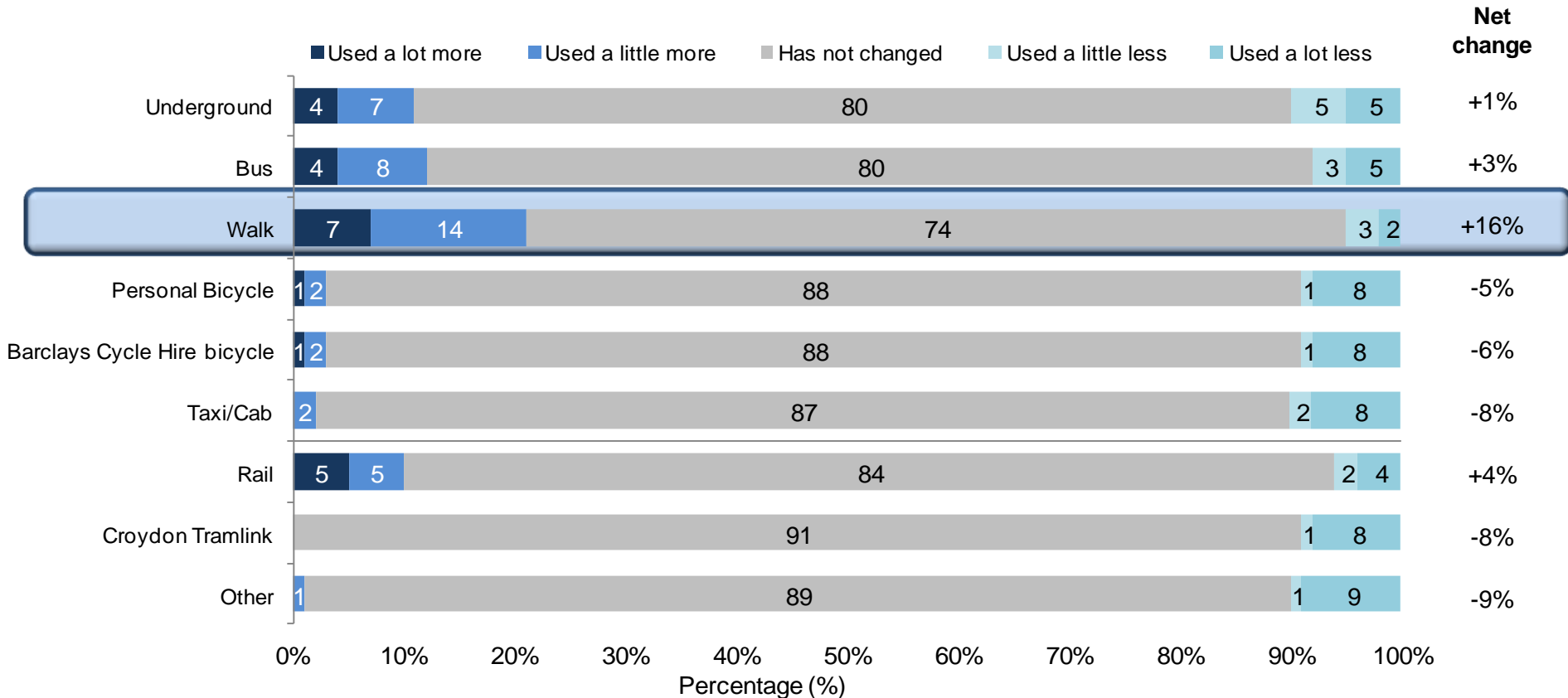


Base: Responses to Q4 and Q5 (1564), Recogniser (788), Non-recogniser (776)

Behaviour Change – other journeys

In relation to walking for **other journeys**, excluding those to/from Waterloo, there has been a net increase of almost two in ten (16%), which is a greater increase than for any of the other modes.

Q6: Now thinking generally about all your **other** travel and transport use in London (excluding travel from and back to Waterloo). How has your usage of each modes of transport changed over the past month?



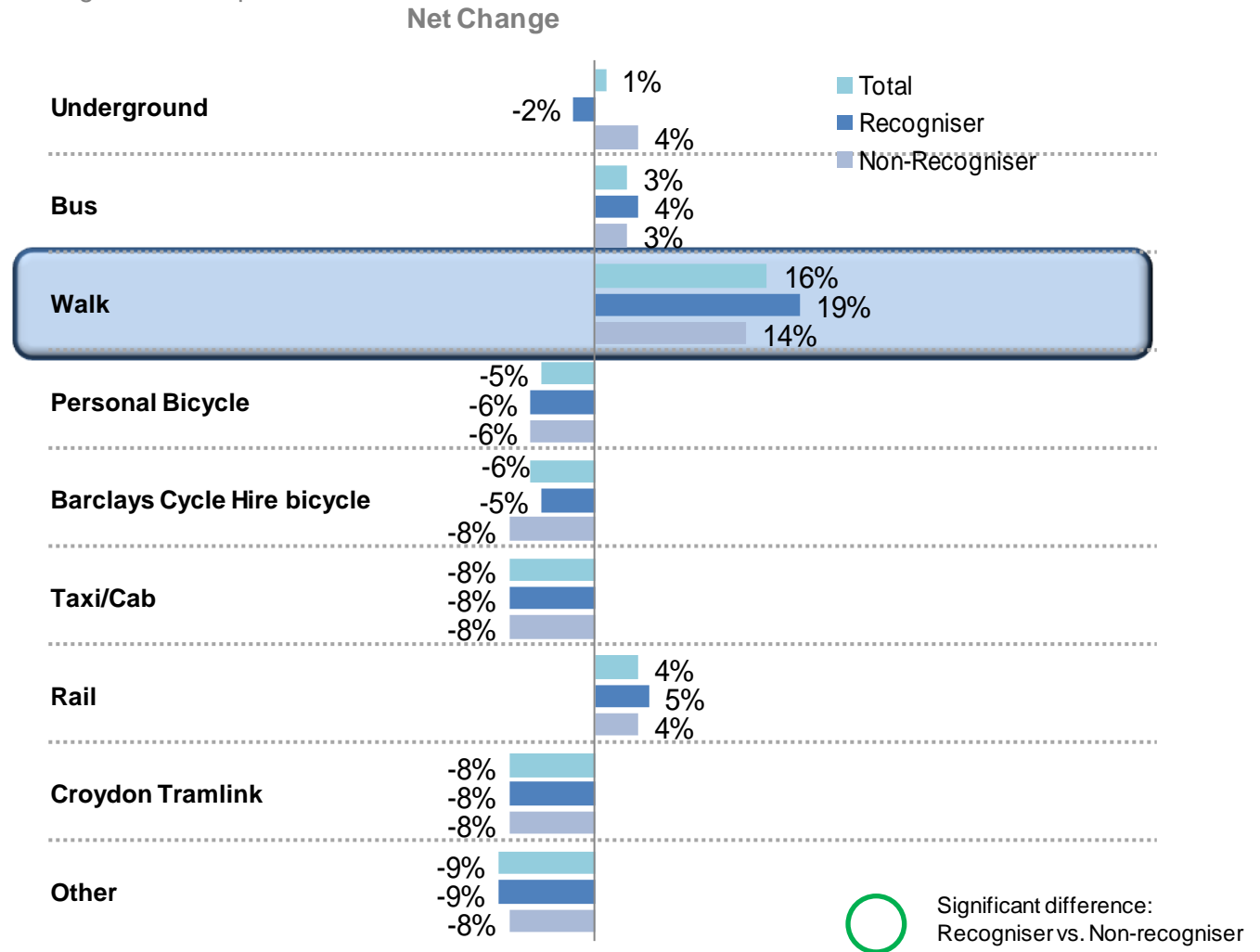
Note: where discrepancies appear between the net change figure and figures in the chart, this is due to rounding

Base: All respondents (782)

Behaviour Change – other journeys

Recognisers of the campaign are more likely to report an increase in walking for **other journeys** than non-recognisers (although this difference is not statistically significant).

Q6: Now thinking generally about all your **other** travel and transport use in London (excluding travel from and back to Waterloo). How has your usage of each modes of transport changed over the past month?



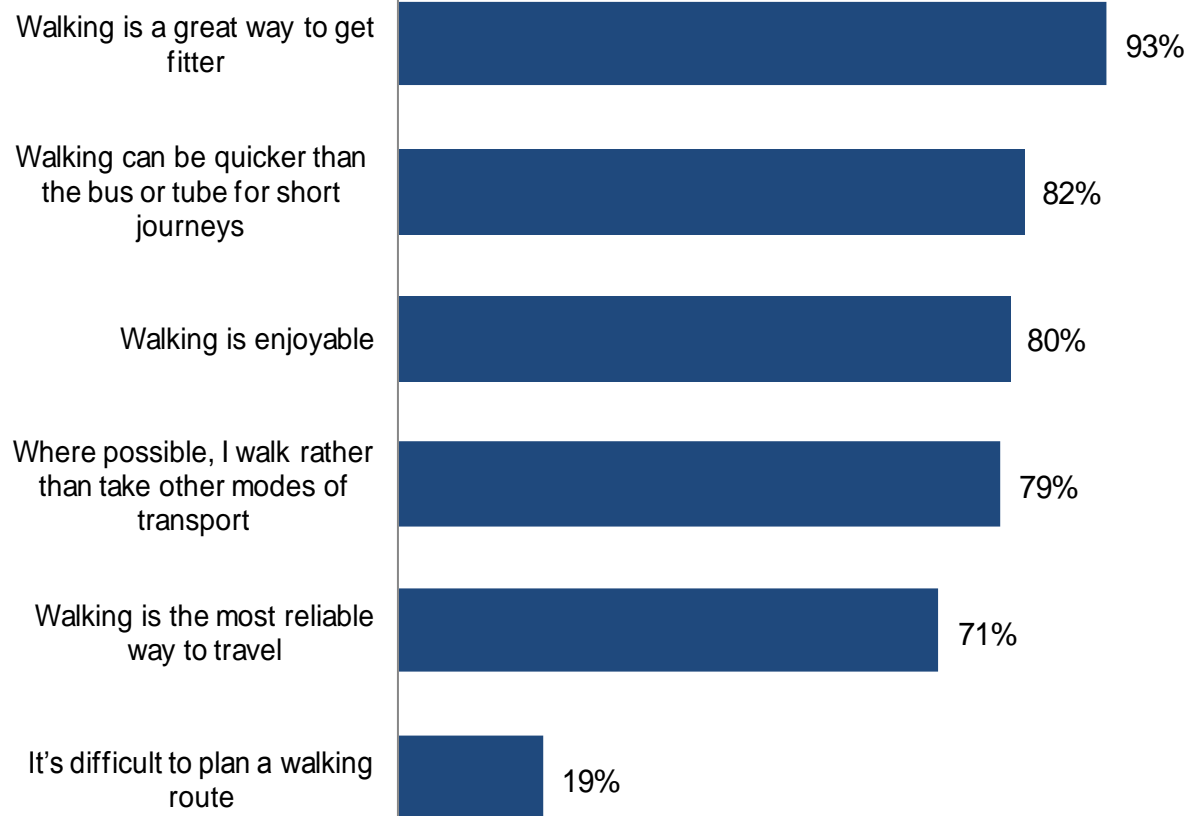
Base: All respondents (782), Recogniser (394), Non-recogniser (388)

Attitudes

Over nine in ten agree walking is a great way to get fitter, and over eight in ten agree walking is quicker and enjoyable.

Q7a: How much do you agree or disagree with the following statements about walking?

Agree %



Attitudes to Walking Survey 2011

91%

N/A

87%

N/A

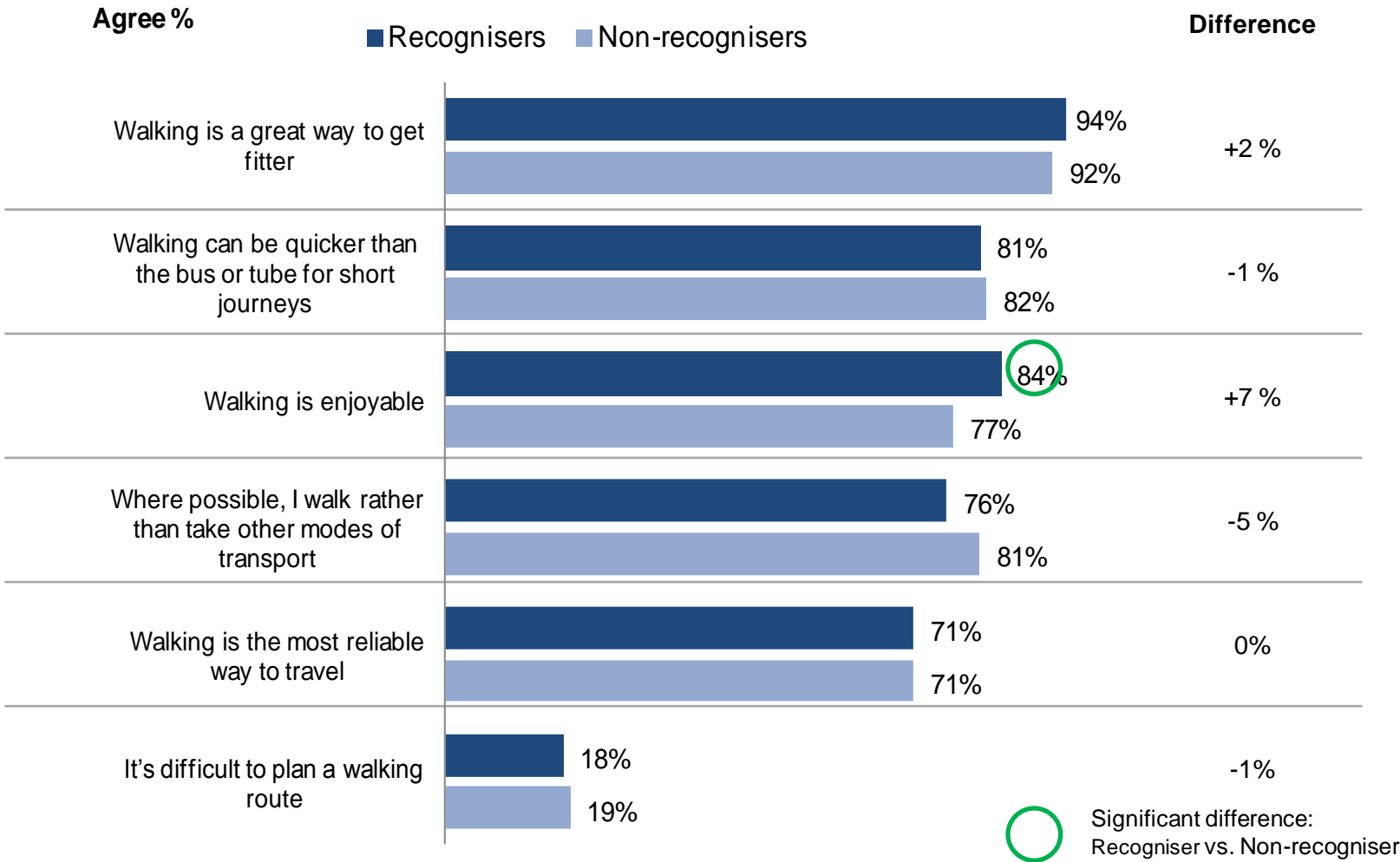
81%

N/A

Base: All respondents (782)

Campaign recognisers find walking significantly more enjoyable.

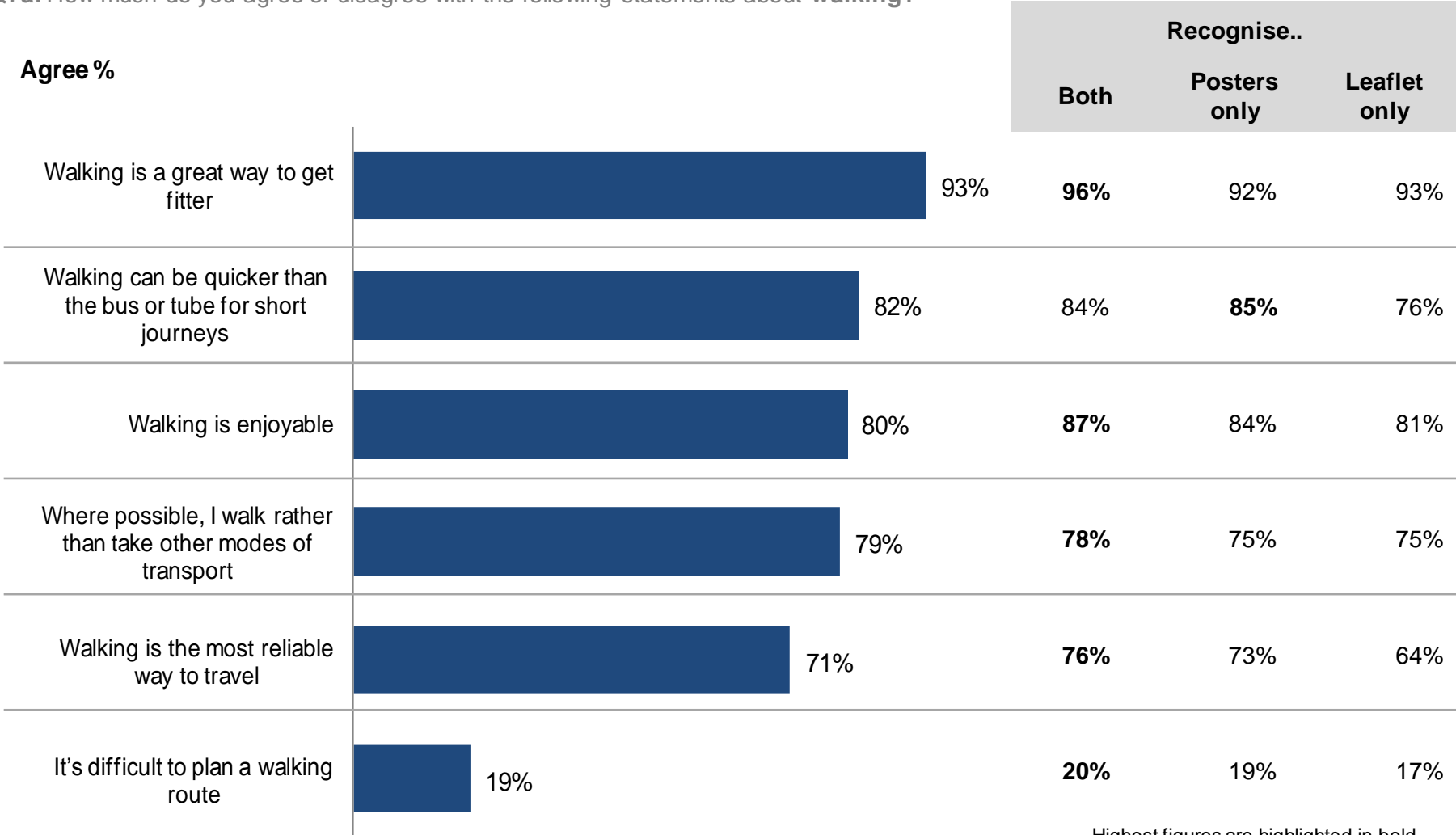
Q7a: How much do you agree or disagree with the following statements about walking?



Base: Recognisers (394) / Non recognisers (388)

Those who have seen both elements of the campaign, i.e. posters plus leaflet, have the most positive attitudes towards walking.

Q7a: How much do you agree or disagree with the following statements about walking?



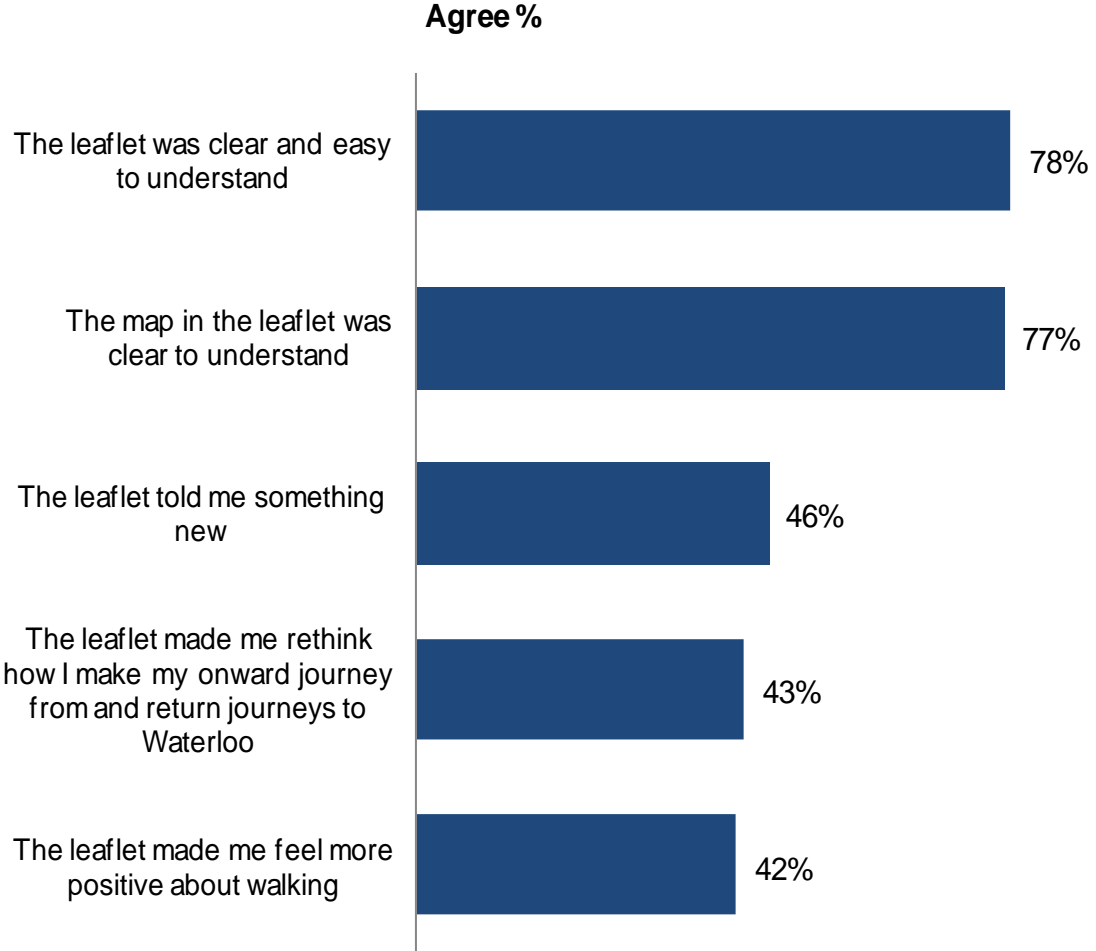
Highest figures are highlighted in bold.

Base: All respondents (782), Recogniser both (133), Recogniser Poster (122), Recogniser Leaflet (139)

Leaflet Content

Over three quarters agree the leaflet and map were clear and easy to understand.

Q10a: Thinking specifically about this leaflet, to what extent do you agree or disagree with the following statements?



Base: Those who recognise the leaflet (272)

- Walking is currently the most frequently used way in which to get to / from Waterloo within a two kilometre radius, followed by the Tube.
- There has been a net increase of 6% for walking; there is no significant difference between people who have and haven't seen the campaign.
 - Interestingly, there has been a greater net increase for other walking journeys aside from journeys to / from Waterloo (16%). This is slightly higher amongst campaign recognisers vs. non recognisers but not significantly.
- There has been no reported change in bus and Tube usage following the initiative.
- Looking at attitudes, most people see the benefits of walking in terms of fitness, quickness, enjoyment and reliability.
 - Campaign recognisers are significantly more likely to agree that walking is enjoyable.
- One half of respondents saw at least one element of the campaign.
 - The leaflet and the posters received similar levels of cut through (35% and 33% respectively).
 - The leaflet and the posters reached different people to a certain extent with each extending the reach by about one third.

- The research suggests that this initiative may have helped to raise the profile of walking as we have seen a 6% net increase in walking for journeys to and from Waterloo and a 16% net increase for other journeys however there are no significant differences in walking behaviour between those who have and haven't seen the campaign
- Based on what we know, the actual increases in walking are unlikely to be to the same extent as the claims, and would not be sustained without sustained and continuous encouragement to walk
- There is no evidence from this research that the reported increases in walking have reduced bus or Tube usage