



Olympic Legacy Monitoring: Personal Travel Behaviour during the Games

Travel in London Supplementary Report

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Contents

Executive Summary	3
1. Introduction	11
2. Methodology.....	13
3. Magnitude of change	17
4. Understanding the drivers of change	36
5. Why change?.....	58
6. Focus on public transport hotspots.....	69
7. Understanding the influence of employers	84
8. Implications for long term change	96
9. Conclusion	114

Executive Summary

Introduction

This report describes the change in travel behaviour by London residents, workers and regular visitors that facilitated the reduction in background demand witnessed during the Games. It shows the scale of change required at an individual level to deliver relatively modest changes in aggregate demand, and explores the actions undertaken by individuals and businesses that enabled this to happen. Further, the report explores whether the changes occasioned by the Games have led to any sustained change in travel patterns, or delivered any other lasting benefits. Finally, this report explores the lessons learned for future policy-making in London and elsewhere, making the most of this unique opportunity to understand the nature and scale of impact that Travel Demand Management (TDM) can have, what worked well, and what worked less well.

Methodology

The report draws in the main on a survey of London residents, visitors and workers, conducted as a panel (so that the same respondents took part in each wave), before, during and after the Games. The methodology for this survey, and other sources of data used throughout the report, is presented in Chapter 2.

Key Findings

Magnitude of change

The fifth Travel in London report estimated that background demand, in other words, normal travel not related to the Games, reduced by five per cent on an average day during the Olympics and three per cent during the Paralympics. Underlying this reduction in overall demand is a great deal of change at the individual level, 35 per cent of regular travellers changed their travel in some way by reducing, re-timing, re-routeing or re-modifying their journey on an average weekday during the Olympics. During the Paralympics, the equivalent figure was 31 per cent. Some of this change will have led to a reduction in overall demand, for example people working from home rather than make their commute, and other changes will have had the effect of moving demand away from busier times and parts of the network.

The Games were characterised by a great many people making modest changes in order to deliver the total change needed to keep London moving. Across the two weeks of the Olympics, more than three quarters of the London travelling population made some sort of change to their travel patterns as a result of the Games and just 23 per cent continued to travel as normal. In total:

- 63 per cent reduced their travel;
- 28 per cent changed the time of their journeys;
- 21 per cent changed route; and
- 19 per cent changed mode.

In total, nearly half of all travellers made more than one type of change to their journeys.

London travellers were more likely to have made a change to their work-related travel – business and commute trips – than to their travel for other purposes. Nearly two thirds of those travelling for business and commuting changed their travel, compared to just 42 per cent of those travelling for leisure purposes.

Commuters were more likely than those changing other types of journey to have chosen to change the time, route or mode of their journey. Conversely, those changing their travel for business, shopping, leisure and other purposes were most likely to reduce the number of journeys they made. This reflects the more discretionary nature of such journeys.

Commuters who changed their mode of travel generally moved away from travelling by public transport and towards walking or cycling. This is similar to the trend seen for business travellers though business travellers generally shifted towards walking, cycling and National Rail and away from London Underground.

Commuters who changed the time of their commute to avoid the busiest times were more likely to move their journeys earlier rather than later. 22 per cent of commuters travelled to work earlier than they normally would, while 6 per cent travelled later. On the way home, 15 per cent of commuters travelled earlier than they normally would, while 7 per cent travelled later. It appears that commuters who changed their travel times generally moved their travel towards the edges of the peak period, in other words, those who normally travel earlier in the peak period travelled even earlier and those who normally travel later travelled even later.

Sustained change

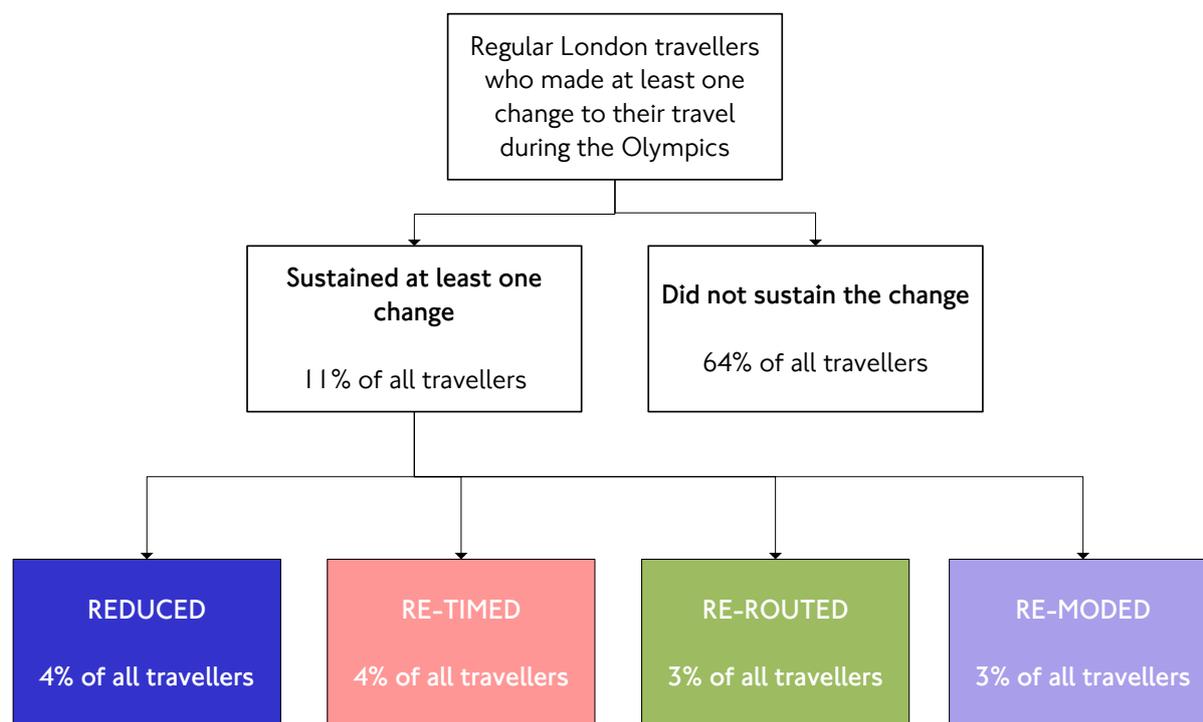
While the goal of the TDM Programme was to change travel during the Games, it was anticipated that the Games may result in some sustained changes in travel patterns. 15 per cent of regular travellers who made a change to their travel during the Games have continued with that change, equivalent to around one in ten (11 per cent) of all regular London travellers.

Similar proportions of travellers have continued with each type of change. This is interesting because it demonstrates that, relatively speaking, reductions in travel were much more likely to be temporary, whereas other changes were relatively more likely to be sustained.

Non-work travellers – those travelling for shopping, leisure or other purposes - were more likely to sustain a change to their journeys (7 per cent) than those travelling for other journey purposes. 6 per cent of commuters have sustained a change to their commute since the end of the Games and 3 per cent of business travellers have sustained a change to their business travel since the end of the Games.

There appears to have been a sustained change in working from home. Before the Games, 13 per cent of commuters worked from home at least one day a week, during the Games this increased to 26 per cent. The proportion working from home at least once a week has decreased since the Games, but remains higher than before the Games at 20 per cent of workers.

Figure E.1 Summary of the regular London travellers who changed their travel during the Games and their behaviour since the end of the Games.



Source: TfL Personal Travel Panel Survey.
Base: 1,347 made at least one change during the Games (wave 1, 2 and 3)

Understanding change

On the whole, patterns of change were similar between different demographic groups, although there was some evidence that those on a higher income were more likely to make some types of change, and that those working for large employers were also more likely to change. This seems more likely to reflect the greater level of engagement and preparation undertaken by larger firms operating in the City and Canary Wharf, rather than any particular propensity to change amongst this group.

Although commuting journeys are typically thought of as being habitual, in fact most commuters have experience of varying their journey: 30 per cent sometimes or often vary their journey, 45 per cent try to make their journey in the same way every day and only change when they have to, and just a quarter always travel in the same way. This research found that commuters who were more amenable to change, demonstrated by being more likely to vary their journey in response to disruption, having a positive attitude to change, or positioning themselves on the route to behaviour change, were generally more likely to plan to make a change to their travel during the Games, more likely to make a change, and more likely to sustain that change after the Games.

London travellers (for all purposes) who were aware of the “Get Ahead of the Games” tools and who had used them were more likely to plan to change their travel and more likely to actually change their travel during the Games. This suggests that it is unlikely that this volume of travel behaviour change would have occurred without any intervention.

London travellers who expected the network to perform badly were more likely to plan to change their travel behaviour than those who expected it to perform well. But, in the event,

nearly all respondents agreed that the network had performed well, and there was very little difference in changes made by expected performance.

Why change?

The main reason London travellers changed their travel during the Games was to avoid overcrowding, congestion and delays caused by the Games. For workers and business travellers, decisions made by their employers or clients were also influential in the decision to change. Some changes resulted from people changing their normal social activities, instead attending Games-related events or simply staying at home to catch up with the latest medals on television!

Conversely, the main reasons given for continuing to travel as normal were that journeys were unaffected by the Games; overcrowding, congestion and delays weren't as bad as expected; or that the person needed to travel and had no other options available.

After the Games, most travel returned quickly to normal. The reasons given for this were that there was no longer any need to change, and that the alternative option had been worse in some way – slower, more expensive, or more inconvenient. For many commuters and business travellers, the nature of their work did not enable them to sustain the change in the longer term, or their employer wouldn't allow it.

Some London travellers had sustained the changes made during the Games, and this was typically because they had found the new option preferable to their previous option.

Focus on public transport hotspots

A series of stations were identified as 'hotspots' during the Games, stations that would be exceptionally busy during the Games. The hotspot stations were Paddington, Marylebone, Euston, Kings Cross, St Pancras, Liverpool Street, Waterloo, London Bridge, Victoria, Charing Cross, Bank, Canary Wharf, Oxford Circus, Leicester Square, Piccadilly Circus, Bond Street, Blackfriars, Fenchurch Street and Cannon Street.

In general, the travel behaviour and choices of commuters through the hotspot stations was similar to all commuters. The vast majority had expected their station to be busier than normal and as a result nearly all had thought about how they would travel during the Games, although many decided to wait and see what happened before committing to a change.

The survey provides valuable information about what tools were found the most useful by commuters. Six in ten had received emails informing them about likely travel conditions at their station, and four in ten had heard announcements at the station or seen posters. A quarter had received a walking map. The most useful information sources were texts and emails – nine in ten recipients found these useful – and in general all communication channels were well received. Focus group respondents said that they preferred messages that were more specific to their journey rather than generic sources of information such as posters, and were even happy for data gathered from their Oystercard to be utilised to tailor messages to their needs.

Notably, regular travellers had used their knowledge of London and its transport system to 'sense check' the advice they were given so that, for example, the 'unusual' routes suggested by the Games Journey Planner (which were aimed at visitors rather than regular travellers) were typically ignored.

Understanding the influence of employers

Businesses had generally planned for the Games through their business continuity teams and were focussed on how best to manage risk. Businesses reported that they had found the information and support provided by TfL helpful and informative. A third of businesses operating in those parts of London most affected by the Games encouraged their employees to change their working patterns, for example by changing annual leave patterns, working hours or encouraging working from home or in other locations. The most popular change was to allow different start or finish times, introduced by a quarter of affected businesses. Most (84 per cent) businesses did not intend to sustain any changes made to working patterns, typically because it was not considered necessary.

45 per cent of businesses in areas most affected by the Games encouraged their staff to make changes to their travel patterns, with many providing information on alternative routes and modes. Just two in ten of the businesses that introduced initiatives to encourage staff to change their travel patterns maintained those changes after the Games.

Many businesses changed the time of meetings to before or after the Games, or placed restrictions on international business travel to and from London during the Games. The use of video and telephone conferencing was limited largely because the short period of time affected meant meetings could be moved relatively easily.

Implications for longer term change

In total, around 11 per cent of London travellers sustained a change they had made during the Games. However, over the same period there has been considerable 'churn' in people's personal circumstances and travel patterns, with one in ten respondents having changed their working status between July and November 2012. It appears that the impact of normal 'churn' on the time, mode and route of journeys was greater than the impact the Games: a higher proportion of commuters have made a new journey than sustained a change resulting from the Games. There is, however, some evidence of a Games-related increase in working from home above and beyond the normal background change, as well as indications of a general trend towards increased working from home.

Relatively few London travellers felt that the changes they had made during the Games had brought them any lasting benefits. The greatest benefit identified was that between a quarter and a third of travellers for all purposes felt better informed to be able to plan their journeys.

It was thought that the experience of changing travel patterns during the Games might make commuters more responsive to longer term changes but, in fact, after the Games London commuters were much less likely to say they were considering changing their journey to work – 11 per cent compared to 32 per cent beforehand. However, there is evidence that London commuters do now consider it to be easier to change their travel behaviour than they did before the Games. For all types of change, more respondents thought it would be easier to make that change after the Games than thought it would be harder. The change commuters thought would be easiest was re-timing their journeys and particularly in such a way as to lengthen the working day, so arriving earlier and leaving later.

14 per cent of commuters, 15 per cent of business travellers, and 18 per cent of those travelling for other purposes thought that the experience of travelling differently during the Games had made them better able to deal with disruption. Most London travellers use the tools available to check for disruption before (84 per cent) and whilst travelling (68 per cent),

and 18 per cent said that they were doing so more since the Games. The most common reason given for this was that they got into the habit during the Games.

In the event of unexpected or planned major disruption, 84 per cent of London travellers said that they would change their journey, 5 per cent that they would not change their journey but would access information before travelling, and 11 per cent that they would travel as normal. There is some evidence that London travellers are more likely to make a change in response to disruption than before the Games: the majority of those who had said prior to the Games that they always make their journey in the same way, said that in the event of major disruption they would change their journey (note that we should be careful in drawing a strong conclusion here as the question wording in the two waves was not directly comparable).

Conclusion

The reduction in travel demand during the Games was delivered by a lot of people making a modest change – this requires high levels of engagement amongst the target population

In order to deliver a relatively modest change in overall background demand, a large number of people made changes to their travel patterns. The level of mass engagement required to deliver this change was possible due to the high profile of the event, and would be difficult to replicate in other circumstances. However, we can see how change varied considerably at a local level depending on both the anticipated impact of the Games and the level of engagement of people and businesses, with Canary Wharf providing the best example of a highly localised pattern of change driven by strong engagement. This perhaps provides a more relevant example for future planning, and shows that substantial change can be achieved at a local level where there is a strong motivation to act.

The type of changes made reflected the circumstances of the journey – business journeys were postponed and leisure activities adapted, whilst commuters were more likely to continue to travel but change their journey in some way. Over a longer period, it is more likely that the choices for different journey purposes would converge, although the more discretionary a journey, the more likely it is to simply be abandoned in the face of adversity.

The key reason that individuals and businesses changed their travel was that they believed the consequences of not changing were worse than the inconvenience of making a change – the message of the campaign was relevant, helpful and plausible

It is clear that the drivers of change were largely in response to the temporary conditions created by the Games: a more challenging travel environment, an acceptance that normal working patterns would need to be relaxed somewhat, and the Games taking over from normal leisure activities. There is no significant evidence that the Games prompted people to make changes they were considering anyway.

It is reasonable to conclude that the change would not have taken place to the same extent without TDM – those who were aware of the “Get Ahead of the Games” campaign and tools were more likely to change. Businesses used the information provided by TfL to get senior level buy-in and allocate resources. The awareness of and engagement with the campaign undoubtedly contributed to the preparedness of London travellers for the Games, and the level of change in travel behaviour seen throughout the Games.

The plausibility of the message was important – the worse people believed conditions would be, the more likely they were to plan to change. London commuters especially are experts in their journeys and filtered the information provided through a ‘sense check’, ignoring anything they did not find plausible.

Some people are more amenable to change than others, so for future TDM activity it would be worthwhile to devote resources to understanding the target population in order to maximise the effectiveness of the campaign and set realistic aspirations

Some people are more amenable to change than others – having a positive attitude to change and prior experience of varying their journey made it more likely that someone would change. Nevertheless, the Games demonstrated that some incidents are significant enough to create change even amongst those most reluctant to do so. We can expect that in future, Travel Demand Management programmes will be more effective with populations more amenable to change, but that a wider group can be engaged where there is a very substantial change to network supply or demand anticipated.

Employers have a significant influence and engagement with businesses can deliver more behaviour change than engaging only with individuals

Employers have a major influence on the travel of their employees – people whose employers had provided advice were more likely to change. In particular, it is only through the actions of employers that employees can reduce or significantly re-time their journeys. Providing tailored support and framing messages in terms of business continuity and risk (or, where relevant, maximising business opportunity) are vital to success in engaging with businesses and thus delivering a change in commute and business travel.

Change will only be sustained where a better option is revealed – most frequent travellers are already aware of the options available to them and are satisfied with their choice, and much of the change that emerged simply became part of the normal and constant ‘churn’

For individual travellers and businesses, the motivation for change is the expected impact on them, and they will revert back to normal once the risk has passed. The only reason to sustain change was where it had revealed a better option, and this was only the case in a minority of cases. It was more common for those travelling for shopping, leisure and other purposes to have found a better option and sustained a change – this may be because travellers are less likely to have explored all the available options for journeys made more infrequently.

Although at an aggregate level travel patterns change very slowly, this conceals considerable churn at the individual level. On the whole, although some change was sustained as a result of the Games, it appears that the long term impact of the Games was less significant than the impact of all the other factors – changes to people’s personal and work circumstances and priorities – that caused travel behaviour to change over the same period.

The exceptions to this appear to be where a trend existed prior to the Games, such as a trend towards increased cycle travel or working from home. Here, it appears that the TDM activity may have acted as an additional trigger for longer term change.

It appears that the Games experience has provided London travellers and businesses with the tools they need to help them cope with disruption, making them more resilient in future

Essentially, London travellers saw the Games as a one-off event with no lasting impact. They were satisfied with the performance of the transport network and that they had been provided with appropriate support, but they did not expect to benefit in the longer term. Despite this, some benefits have emerged:

- There is evidence that, having got into the habit during the Games, London travellers are now more likely to use the tools available to check for disruption before making a journey and whilst travelling;
- It also appears that London travellers think change would be easier, although there is no evidence of a greater intent to change (and, if anything, evidence that the reverse is true);
- Some businesses reported that they now have plans or systems in place that will help them cope better with future disruption; and
- Around one in six London travellers thought that their experience during the Games had made them better able to deal with disruption, and there was some evidence that commuters were more likely to change their journey in response to disruption than before the Games.

The TDM approach used for the Games can be usefully applied to situations where travellers face a major change to network supply or demand, such as a line or station upgrade or a major event

It appears that most London travellers are satisfied with their current choices and feel that these choices meet their needs. Nevertheless, it also appears that TDM activity can be effective and useful where travellers face a major change to their available options, and where TDM messages can present a believable story about the likely impact of this change, and offer realistic alternatives. The more bespoke the message, the more effective it is likely to be. Thus, there is much to be learned from the Games-time interventions in planning for major events and other causes of disruption, such as rail or road works, in future.

1. Introduction

Introduction

The London 2012 Olympic and Paralympic Games presented the greatest peace-time logistical challenge this city has ever faced. The over-riding objective of transport preparations for the Games was to ensure a successful Games whilst keeping London moving and open for business. The fifth annual Travel in London report described the approach taken to infrastructure provision and service enhancements on the public transport and road network. It was recognised that these enhanced services and operational performance on the network would be insufficient on their own. A significant change in travel behaviour by regular travellers – residents, workers and regular visitors – would also be required.

In order to meet this challenge, a major programme of Travel Demand Management (TDM) was put in place. This programme was supported by the high profile ‘Get Ahead of the Games’ campaign (GAOTG), jointly sponsored by TfL and London 2012, involving widespread publicity across the network and engagement through many different channels (the internet, social media, workshops and so on) with visitors, regular travellers and businesses.

Through the Travel Advice for Business element of this programme, TfL engaged with businesses and regular travellers to advise them of the busiest times and places on the roads and public transport network, and to advise them of the alternative options available. TfL worked with businesses to facilitate changes to working patterns so that employees could work away from their normal workplaces, take annual leave, or change the time of their journeys. Businesses were encouraged to delay business journeys, or to use video and telephone conferencing. Those who needed to travel to work or to make business journeys were encouraged to change the time, mode or route of their journey in order to avoid the most congested periods.

The TDM programme was supported by the Active Travel Programme which aimed to promote walking and cycling through communications and improved infrastructure.

Travel in London 5 described the overall scale of travel by different modes throughout the Games period, and presented an early insight into the effectiveness of the TDM measures. Overall, it is estimated that background demand – travel unrelated to the Games – reduced by five per cent during the Olympics and 3 per cent during the Paralympics.

In the first instance, this report describes the change in travel behaviour by London residents, workers and regular visitors that facilitated this reduction in background demand. It shows the scale of change required at an individual level to deliver relatively modest changes in aggregate demand, and explores the actions undertaken by individuals and businesses that enabled this to happen.

Further, the report explores whether the changes occasioned by the Games have led to any sustained change in travel patterns, or delivered any other lasting benefits. One hypothesis is that London travellers and businesses may be more resilient in the face of future disruption, due to the increased awareness of alternatives and preparedness for change. Some businesses, for example, may be able to apply the strategies implemented in Games-time to other instances of disruption, such as strikes or planned closures.

The Games-time campaign was probably the largest programme of TDM ever implemented in London. It provides a unique opportunity to understand the nature and scale of impact that

such programmes can have, what worked well, and what worked less well. Therefore, finally, this report explores the lessons learned for future policy-making in London and elsewhere.

Report contents

In summary, the report covers:

An **Executive Summary** summarises the results and conclusions presented throughout the report.

Chapter 1 introduces the report and its contents.

Chapter 2 describes the data sources and the methodology of data collection for each source.

Chapter 3 describes the magnitude and nature of travel behaviour change during the Games overall and by journey purpose, and looks at the extent to which these changes have been sustained.

Chapter 4 examines the characteristics of those who changed, and those who continued to travel as normal, in terms of their personal characteristics, where they live and work, the type of work they do, their attitudes and experiences.

Chapter 5 explores the reasons why London travellers changed or didn't change their journeys. It also explores why those who changed during the Games chose to sustain those changes or to go back to normal.

Chapter 6 focuses in more detail on commuters travelling through key public transport hotspots during the Games, looking at their response to Games messaging and at the changes made to travel behaviour as a result.

Chapter 7 explores the influence of employers on changes to work-related travel and presents the results of research undertaken with businesses to understand how they responded to the Games, what changes were made by businesses, and what changes they encouraged their employees to make.

Chapter 8 assesses the implications of the Games for longer term change. It asks to what extent have these changes been maintained and to what extent is this change greater than the normal 'churn' that would be seen over a similar period of time? Is there any evidence of changing attitudes to travel behaviour change? Or of a greater preparedness for planned and unplanned disruption in future?

Finally, key findings and lessons learned for future policy are summarised in a **Conclusion**.

2. Methodology

Several different pieces of fieldwork have contributed to the analysis presented in this report. This Chapter describes the methodology of each of these surveys, and explains where results can be found in this report and other accompanying reports.

ODA Olympics and Paralympics Journey Maker Surveys

The ODA undertook a small daily survey throughout the Games, called the Journey Maker survey, to understand the changes to travel behaviour being made. The results of this survey were produced quickly so that the information could be used to review and/or adjust the Games Time travel demand management messages as required. In total, 5,304 respondents completed the survey during the Olympics and 3,439 during the Paralympics. The survey consisted of:

- Olympic Games-Time Journey Maker survey, administered daily between 24th July and 12th August, with a typical sample size of 200 to 500 respondents.
- Paralympic Games-Time Journey Maker survey, administered daily between 29th August and 7th September, with a typical sample size of 200 to 350 respondents.

Results from the ODA Olympic and Paralympic Journey Maker Surveys are presented in Chapter 3 of this report and the in fifth annual Travel in London report.

TfL Olympic Personal Travel Panel Survey

TfL undertook a large scale Personal Travel Panel Survey interviewing regular travellers in London before, during and after the Olympic Games. The purpose of the survey was to understand how London residents, workers and regular visitors planned to change their travel during the Games, to explore how they responded during the Games, their experience of that change and whether they choose to sustain the changes made in the longer term.

The survey was conducted by AECOM on behalf of TfL and involved three survey waves:

- Pre-Games Wave – undertaken in July 2012 with 7,194 respondents, it focused on establishing normal travel patterns, awareness of the need to change travel patterns during the Games, and plans to do so.
- Games Time Wave – undertaken in August and September 2012, during the Games, with 2,805 respondents, the survey concentrated on changes made to commute, business and other journeys during the Games.
- Post-Games Wave – undertaken after the Games in November 2012 with 1,799 respondents, the survey explores the impact of changes made during the Games on respondents, whether any change has been sustained and the reasons for this choice, and attitudes towards future change.

The sample was primarily drawn from TfL's customer database, which contains the contact details of Oystercard holders, Congestion Charge registered users, Barclays Cycle Hire members and anyone who has signed up for any of TfL's information services. Some additional recruitment was conducted on-street prior to the Games to increase the sample of car drivers.

The survey was conducted as a panel, so that the same respondents took part in each wave. In wave three, additional fieldwork was undertaken with 1,204 respondents who had dropped

out of the survey after wave one and 277 respondents who had not responded to any previous waves of the survey.

This survey is the core source of data for this report and results are presented throughout.

TfL Oyster and Hotspot User Survey

The TfL Oyster and Hotspot User Survey was a survey of Oystercard users who regularly use one of the hotspot rail and Underground stations identified as part of the Games Travel Demand Management programme and other key stations. These stations are: Paddington, Marylebone, Euston, Kings Cross, St Pancras, Liverpool Street, Waterloo, London Bridge, Victoria, Charing Cross, Bank, Canary Wharf, Oxford Circus, Leicester Square, Piccadilly Circus, Bond Street, Blackfriars, Fenchurch Street and Cannon Street. 'Regular users' were defined as those who entered or exited the same station on at least three occasions per week for at least three of four weeks immediately prior to the start of the Olympic Games. The majority were people travelling to work.

The survey was undertaken by SDG on behalf of TfL, and was conducted online. A total of 2,709 completed responses were received. The survey was piloted between 21st and 22nd November 2012, with the main fieldwork conducted between 19th December 2012 and 14th January 2013.

Results from the TfL Oyster and Hotspot User Survey are presented in Chapter 6 of this report.

TfL Oyster and Hotspot User Focus Groups

Following the TfL Oyster and Hotspot User Survey, four focus groups were undertaken by in February 2013 by SDG on behalf of TfL with a sample of respondents from the main survey who had used four of the hotspot stations: Waterloo, Bank, Canary Wharf and London Bridge. The purpose of the focus groups was to gain an in-depth understanding of responses to TDM activity during the Games and in particular to understand which communications channels were found to be most useful and effective by London travellers.

Results from the TfL Oyster and Hotspot User Focus Groups are presented in Chapter 6 of this report.

TfL Olympic Business and Freight Survey

The TfL Olympic Business and Freight Survey was a large scale survey with businesses and freight operators in London aiming to establish the impact the Games had on business activity, the effectiveness of their plans to minimise disruption, and any long term impacts. The survey was conducted by AECOM on behalf of TfL during 2012. It involved three survey waves:

- Pre-Games Wave – undertaken in May 2012 this focused on establishing the level of awareness about the Games and of information to minimise the impact of the Games, and the extent to which the industry was establishing plans to adapt operations during the Games period.
- Games Time Wave – undertaken in August 2012 during the transition period between the Olympic and Paralympic Games with the aim of understanding the level of adaptation by businesses and freight operations and any immediate impacts of the Games on operations.

- Post-Games Wave – undertaken in November 2012, well after the end of the Paralympic Games when business operations were expected to be back to normal. This wave focused on understanding in more detail some of the Games adaptations and explored whether any of the changes had been sustained. It also focused on the possible cost implications of changes and the barriers to making changes under normal operations.

Each survey wave involved telephone interviews with 1,000 general businesses located in the areas most likely to be affected by the Games: in Central London, on the ORN/PRN, and around Games venues, and with 1,000 freight operators who did business in London (but were not necessarily based in London). Respondents at each wave were asked to participate in the next wave (if willing) providing a panel element to survey but the total sample of 1,000 businesses and 1,000 operators was retained by substituting respondents who dropped out with a fresh sample.

The main sampling source was the Experian National Business Database for both businesses and freight operators. The freight operator sample was boosted with in-house databases including the FORS (Freight Operator Recognition Scheme) database, the Freight Advice Programme attendance list and attendees from freight workshops.

Quotas were set in order to obtain a range of different sized businesses and freight operators. Annual turnover was used for businesses differentiating between small enterprises (those with turnover of up to £10 million per year - quota was 70 per cent) and large enterprises (those with annual turnover over £10 million - quota was 30 per cent). Fleet size was used for freight operators, differentiating between small operators (those with up to 10 vehicles - quota was 60 per cent), medium operators (those with between 10 and 100 vehicles - quota was 30 per cent) and large operators (those owning over 100 vehicles - quota was 10 per cent). Apart from the quotas adopted by size, a minimum of 10 per cent per industry sector was also adopted for both businesses and freight operator to enable detailed analysis by sector.

Results from the Business and Freight Survey are presented in Chapter 7 of this report. Further results can be found in the accompanying report: Freight and Business Travel in the London 2012 Olympic and Paralympic Games, a Travel in London Supplementary Report.

TfL Business Case Studies

A series of business case studies covering goods and servicing, and business and commuter travel were collected by Parsons Brinkerhoff on behalf of TfL in 2012. The case studies explored how businesses and employers prepared for the Games, providing an in-depth understanding of the planning undertaken in order to cope with the Games period, business experiences of the Games and the impact of the Games on their business activity. The case studies also seek to identify any lessons learned for the future.

In total, 74 organisations agreed to act as a case study, and in each case an in-depth interview was undertaken, all of which were completed between September and November 2012. A range of businesses were interviewed from different sectors and sizes, with a focus on businesses operating in areas most likely to be affected by the Games (i.e. close to Games venues, the ORN and PRN). The sample of businesses was taken from the Travel Advice for Business Programme contacts, those who had requested Legible London maps and some ad

hoc recruitment to ensure that the sample included businesses which were more and less actively engaged with TfL.

Results from the Business Case Studies are presented in Chapter 7 of this report. Further results can be found in the accompanying report: Freight and Business Travel in the London 2012 Olympic and Paralympic Games, a Travel in London Supplementary Report.

3. Magnitude of change

This chapter quantifies the magnitude of change in travel behaviour during the Games and what measures individuals took to change their travel behaviour. It also looks at whether the Travel Demand Management programme and the experience of the Games have led to any changes to travel behaviour in the long term.

In particular this chapter covers:

- Change to travel demand on an average day during the Games;
- Change in travel behaviour during the Games by journey purpose; and
- Sustained change in travel behaviour beyond the end of the Games.

This Chapter draws on the TfL Personal Travel Panel Survey, waves one to three, and the ODA Journey Maker Survey. The methodology of these surveys is described in Chapter 2.

Key findings:

- The fifth Travel in London report estimated that background demand, in other words normal travel not related to the Games, reduced by five per cent on an average day during the Olympics and three per cent during the Paralympics.
- On an average weekday during the Olympics, 35 per cent of regular travellers changed their travel by reducing, re-timing, re-routeing or re-modifying their journey. During the Paralympics the figure was 31 per cent.
- Across the two weeks of the Olympics, more than three quarters of the London travelling population made some sort of change to their travel patterns as a result of the Games and 23 per cent continued to travel as normal.
- In total, 63 per cent reduced their travel, 28 per cent changed the time of their journeys, 21 per cent changed route and 19 per cent changed mode. 48 per cent of travellers made more than one change to their journeys.
- 32 per cent of commuters continued to travel as normal during the Olympics while 54 per cent of commuters made at least one change to their travel during the Olympics. The remainder were on leave or not working throughout for reasons unrelated to the Games. As with all regular London travellers, the most common change was to reduce the number of journeys to work (27 per cent of all commuters).
- 43 per cent of those who were business travellers before the Games made a business journey during the Olympics. 26 per cent of business travellers reduced their travel during the Olympics and 35 per cent made at least one change to their travel during the Olympics.
- Between four and five in ten of those travelling for non-work purposes made a change to their travel.

- 15 per cent of regular London travellers who made a change to their travel during the Games have continued with that change, equivalent to 11 per cent of all regular London travellers. 'Reduce' was the most likely change to be sustained for all journey purposes.
- There has been a sustained increase in working from home. Those who have continued to work from home more than they did before the Games intend to work from home over the next three months more frequently than all commuters.

Travel in London 5, published in December 2012, presented estimates of total travel demand, travel associated with the Games, and the degree of reduction in 'normal' travel across the network. This analysis concluded that background travel demand was around 5 per cent lower during the Olympics and 3 per cent lower in the Paralympics than would have been expected in Summer 2012 without the Games.

In addition to this aggregate reduction in background demand was a much greater level of change to the route, mode and time of journeys made, which in turn lead to a more substantial reduction in background travel demand at some locations, on some modes and at certain times, but not to any change in the total amount of travel.

The goal of travel demand management during the Games was to achieve reductions of up to 30 per cent in background demand at certain places and times, in order to ensure that the Games family and spectators reached Olympic venues on time and that London continued to operate during the Games. Throughout the Games, much of London remained unaffected: TfL predicted that 65 per cent of stations and 70 per cent of traffic would be unaffected. The Travel Demand Management (TDM) programme was targeted at those who normally travel in or through affected areas and at businesses operating in those areas. Information was provided about the scale of disruption that could be expected and individuals and businesses were encouraged to make plans to help them cope with this disruption. The programme was based on encouraging four principle responses: Reduce, Re-time, Re-mode and Re-route. In addition, the Active Travel Programme aimed to promote walking and cycling during the Games through communications and improved infrastructure.

Personal Travel during the Games

Survey research has attempted to quantify the totality of change made by London's travelling population, and further to understand the distribution of that change across the population and network. In particular, the research sought to understand the volume of change that was required to deliver such a reduction in total background demand and to provide the capacity needed for Games-related travel. For example, did a small number of people make substantial changes to their travel, or did many people make many smaller-scale changes?

It is worth noting that many changes may have the effect of cancelling one another out at an aggregate or local level, but may still be worthwhile in terms of facilitating Games demand. For example, if a traveller re-routes their journey by getting off a

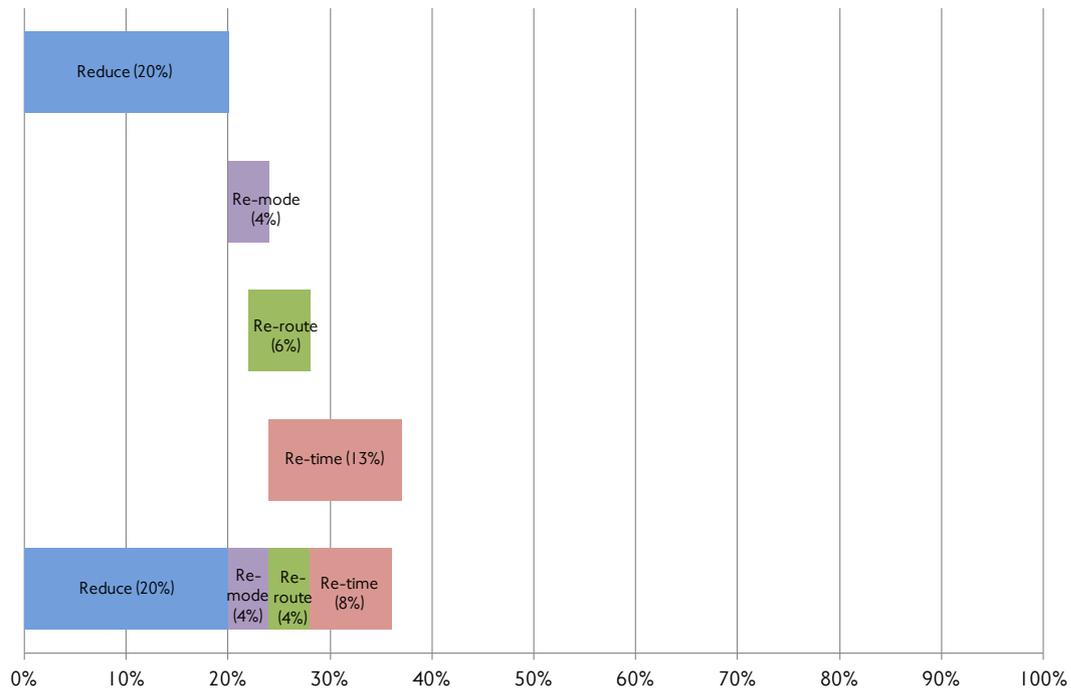
train at Vauxhall rather than Victoria, and a second traveller re-routes their journey from London Bridge to Victoria, Victoria sees the same amount of travel and overall, but perhaps a more efficient use is made of the network, with travellers avoiding a key Games hotspot (London Bridge). Equally, whilst people may have reduced their 'regular' journeys, these may have been replaced by other journeys contributing to aggregate London-wide demand. So, a traveller may work from home rather than in their central London office, and pop out to their local shop at lunchtime: a return commute journey is replaced by a return local shopping journey. Thus, we would expect the overall reduction in demand to be somewhat lower than the reported reduction in 'regular' journeys.

Change in background travel demand on an average day

Research carried out throughout the Games found that on an average weekday around a third of people changed their travel behaviour during the Olympics and slightly fewer during the Paralympics (based on the Games-time Journey Maker surveys). This group made at least one of four changes to their regular travel: changing the mode, route or time of a journey that they normally make, or reducing their travel by choosing not to make their regular journey. In order to provide an assessment of total change, the options have been classified in a hierarchy based on the assumed difficulty of making such a change. It is assumed that, of the changes that can be made to a journey, it is more inconvenient to change the mode of travel than to alter the route, and it is easiest to change the time of the journey. Clearly, the relative ease of making changes will vary according to individual circumstances so this hierarchy is taken as a common sense average only.

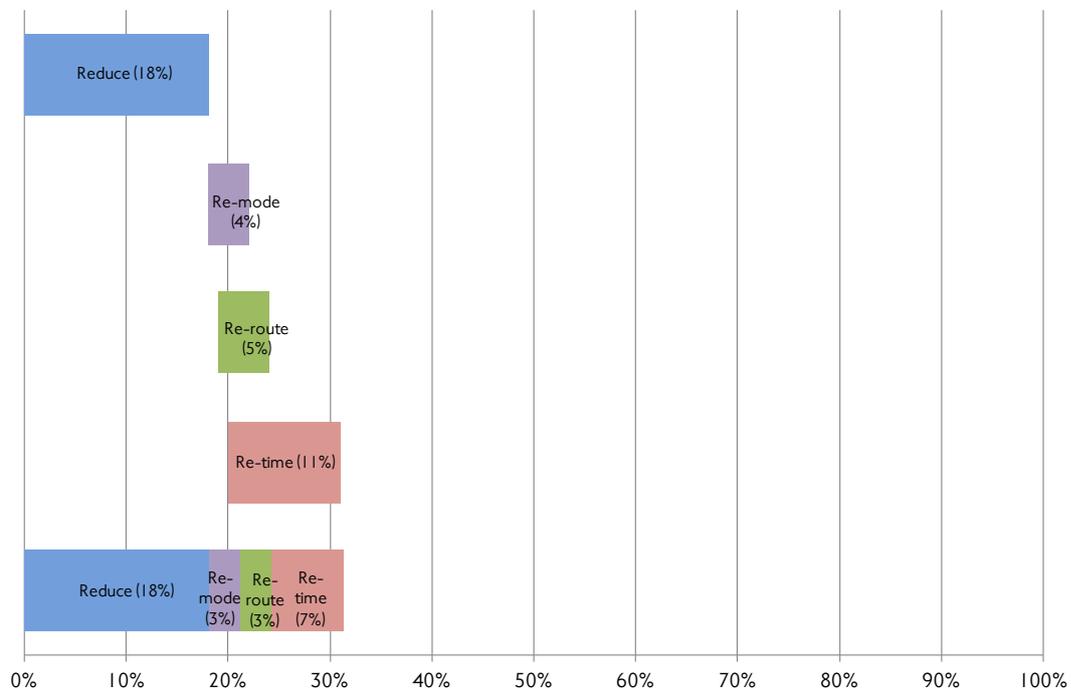
Figure 3.1 shows the reported change to normal travel on an average weekday during the Olympics. 20 per cent of people did not make their normal journey and a further 15 per cent made their normal journey, but changed it in one or more ways. Figure 2 shows the reported change to normal travel on an average weekday during the Paralympics. 18 per cent of people did not make their normal journey and a further 13 per cent made their normal journey, but changed it in one or more ways.

Figure 3.2 Overall change in 'regular travel' on an average weekday during the Olympics.



Source: ODA/TfL TDM Olympic Games-time Journey Maker Survey.
 Base: 5,304 regular travellers in London

Figure 3.3 Overall change in 'regular travel' on an average weekday during the Paralympics.

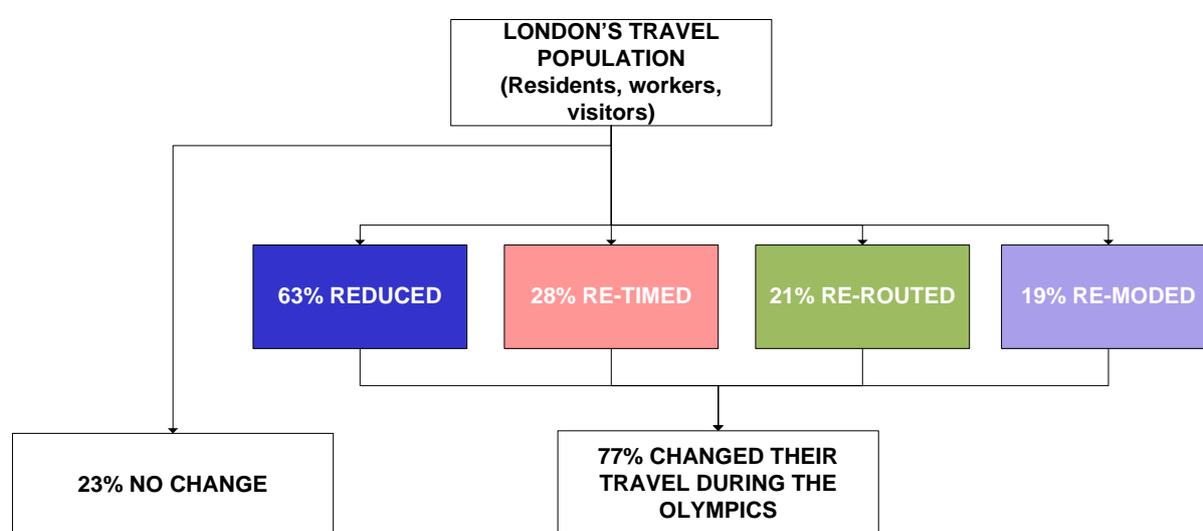


Source: ODA/TfL TDM Paralympic Games-time Journey Maker Survey.
 Base: 3,439 regular travellers in London

Change in travel behaviour during the Games

Across the two weeks of the Olympic Games, more than three quarters of the London travelling population made some sort of change to their travel patterns as a result of the Games and just 23 per cent continued to travel as normal throughout (based on TfL's Personal Travel Panel Survey waves one and two). In total, nearly two thirds of London travellers reduced their travel by choosing not to make at least one of the journeys they would normally have made during the Olympic period. 28 per cent changed the time of some of their journeys, 21 per cent the route and 19 per cent changed mode at least once in the course of the Games. Many London travellers made more than one change to their travel patterns, 48 per cent of those who made a change.

Figure 3.4 Summary of travel behaviour change by London's normal travelling population during the Olympic Games.



Source: TfL Personal Travel Panel Survey
Base: 2,805 respondents (wave 1 and 2)

London travellers were more likely to have made changes to their work-related travel – business and commute trips – than to their travel for other purposes. Nearly two thirds of those travelling for business and commuting had changed their travel, compared to just 42 per cent of those travelling for leisure purposes.

Commuters were more likely than those changing other types of journey to have chosen to change the time, route or mode of their journey. Conversely, those changing their travel for business, shopping, leisure and other purposes were most likely to do so by simply reducing the number of journeys they made. This reflects the more discretionary nature of such journeys, and may also reflect the fact that some normal leisure travel will have been replaced by broadly Games-related leisure travel, such as attending ticketed or un-ticketed events, Cultural Olympiad and Games family activities (such as the National Houses), and watching the Games broadcasts at home or elsewhere.

By far the greatest reduction can be seen in business trips, with 55 per cent of those who would have been expected to make a business journey reducing their travel, many of whom did not make a business journey at all in the two working weeks of the Olympics. This may reflect the knock-on impact of changes to commuting, with parts of the workforce working

from home or abnormal hours preventing meetings taking place. It is also relevant that workers in 'higher' occupational groups and on a higher income, who are assumed to be more likely to make business journeys in normal conditions, were more likely to have reduced their commute travel.

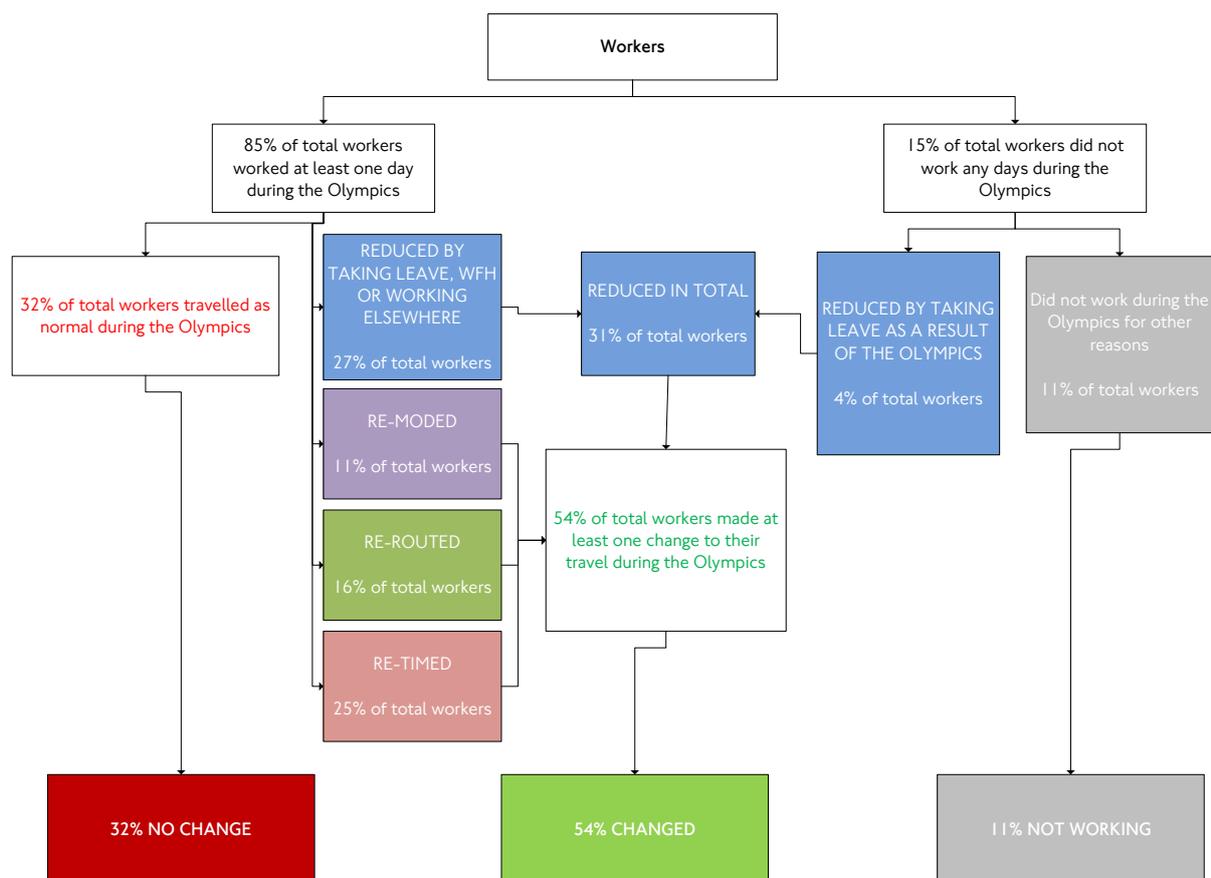
Understanding changes to Commuting

Commuting normally makes up 17 per cent of journeys in London. 2,372 respondents to TfL's Personal Travel Panel Survey normally commute in Greater London.

Magnitude of change in commuting journeys

85 per cent of commuters worked at least one day during the Games, 4 per cent of commuters were on annual leave for the whole Games as a result of the Olympics and 11 per cent did not work any days during the Olympics for other reasons. 32 per cent of commuters continued to travel as normal during the Olympics while 54 per cent of commuters made a least one change to their travel during the Olympics. As with all regular London travellers, the most common change was to reduce the number of journeys to work (27 per cent of all commuters). However, commuters were relatively less likely to reduce their journeys and more likely to make other changes. 25 per cent of commuters changed the time of their commute at least once during the Games, 16 per cent the route and 11 per cent the mode.

Figure 3.5 Summary of travel behaviour change by London's normal commuters during the Games.



Source: TfL Personal Travel Panel Survey
Base: 2,372 respondents (wave 1 and 2)

Reduction in journeys to usual workplace

The TDM programme promoted three different ways to reduce travel to usual workplaces during the Games: taking annual leave, working from home or working from a different location. 15 per cent of those in work did not work any days during the Games. Of this group, 11 per cent said that this was unrelated to their Games, for example because they normally went on holiday at this time of year. 4 per cent had chosen to take annual leave as a result of the Games.

27 per cent of workers said that they had reduced their travel to work at some point during the Games, meaning that in total 31 per cent of workers reduced their travel as a result of the Games (including those who took leave for the entire period as a result of the Games). Before the Games, on average employed respondents worked 4.5 days per week at their usual workplace and this decreased to 3.8 days per week during the Games. Other reductions in journeys to usual workplace were made including:

- 20 per cent took some annual leave because of the Games (either to attend the Games or to avoid any related disruption);
- 13 per cent worked from home more than they normally do; and
- 5 per cent worked at other locations more than normal.

Some respondents reduced their travel in more than one way, for example by taking some annual leave and working from home on other days.

Changing the mode of travel to work

The TDM and Active Travel programmes encouraged commuters in London to use alternative modes to make their journeys during the Games so that they could avoid the busiest parts of the transport network. The Active Travel programme aimed to increase the levels of walking and cycling during the Games.

13 per cent of those who worked at least one day during the Games changed their mode of travel to work at some point during the Games. As shown in Figure 3.5, this led to a reduction in the mode share for London Underground/DLR from 30 per cent before the Games to 22 per cent during the Games and an increase in walking and cycling from 20 per cent before the Games to 27 per cent during the Games.

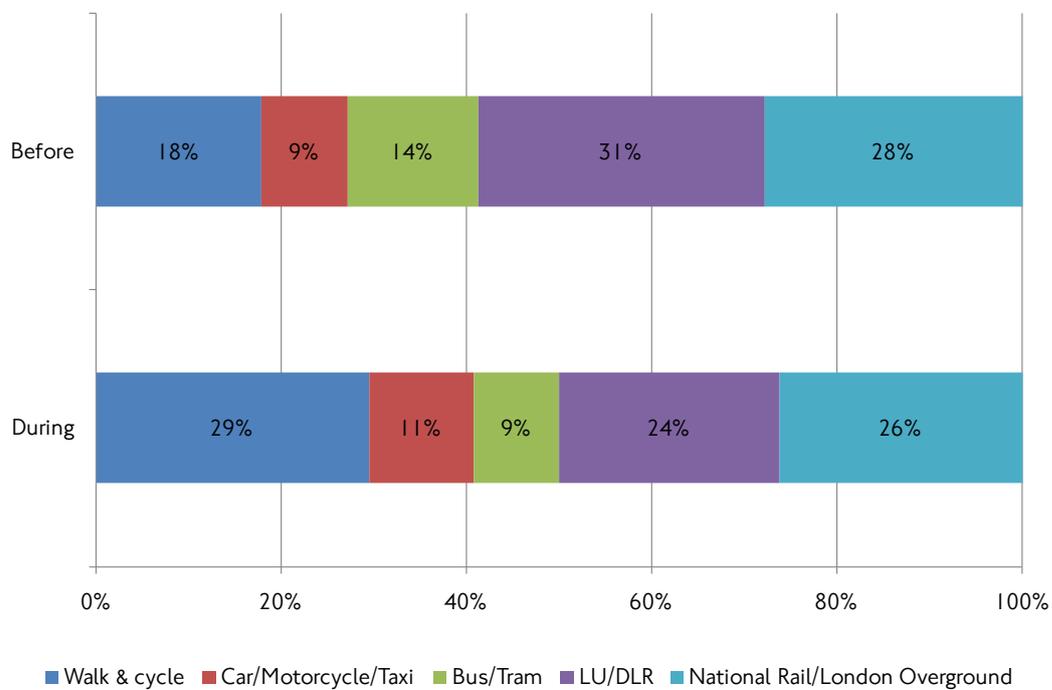
Figure 3.6 shows the main mode for journeys to work before and during the Games of those who changed their mode of travel. This shows that respondents generally moved away from travelling by public transport and towards walking or cycling.

Figure 3.6 Mode share of commuting trips before and during the Games for all commuters.



Source: TfL Personal Travel Panel Survey.
Base: 1,053 respondents

Figure 3.7 Mode share of commuting trips before and during the Games for those who changed mode during the Games.

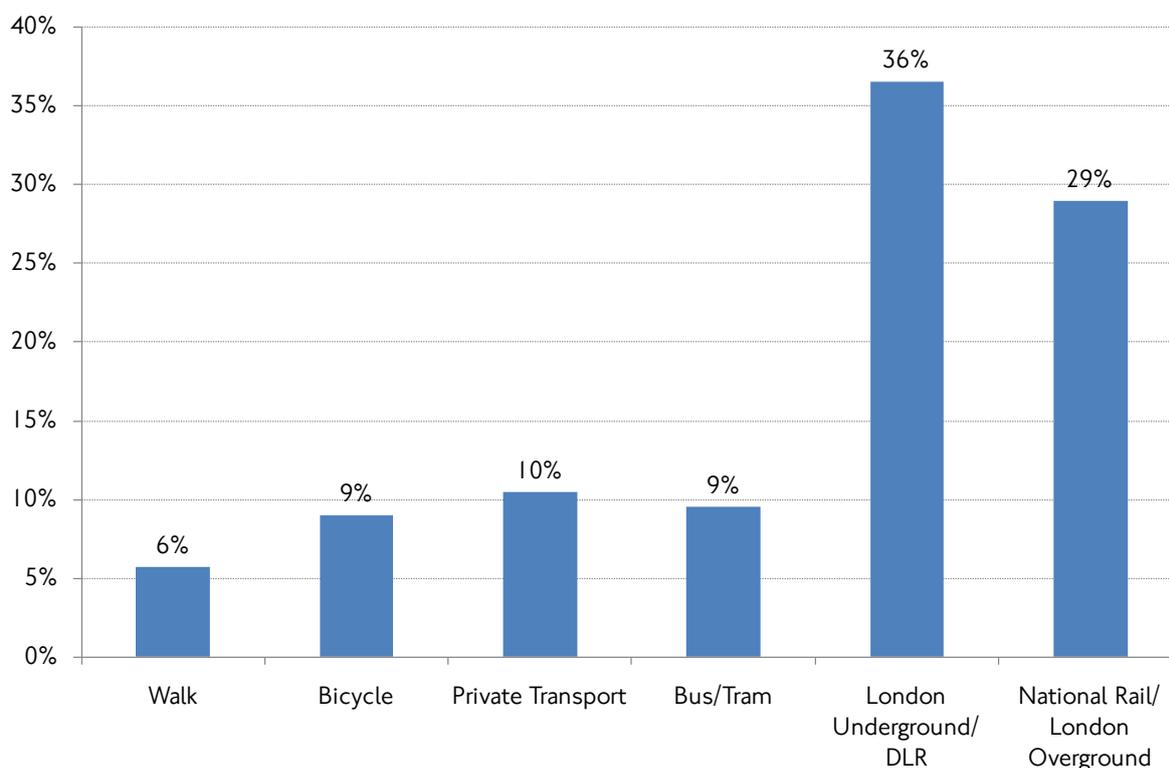


Source: TfL Personal Travel Panel Survey.
Base: 248 respondents (wave 1 and 2)

Changing the route to usual workplaces

The TDM programme encouraged travellers to change the route of their journey to avoid the busiest lines and stations. 18 per cent of those who worked at least one day during the Games reported that they had taken a different route to work at least once. Those who changed their route were more likely to have travelled by London Underground/DLR (36 per cent) and National Rail/London Underground (29 per cent) than other modes.

Figure 3.8 Mode share of those who made a reroute change to their journey during the Games.



Source: TfL Personal Travel Panel Survey.
Base: 211 respondents (wave 1 and 2)

Changing the time of travel to usual workplaces

Commuters were encouraged to change the times they set out and returned home so that they avoided the busiest times on the transport network. During the Games, 22 per cent of commuters travelled to work earlier than they normally would, while 6 per cent travelled later. On the way home from work, 15 per cent of commuters travelled earlier than they normally would, while 7 per cent travelled later.

Table 3.1 shows the mean departure time for commuting trips before and during the Games split by those who travelled earlier during the Games and those who travelled later. It appears that commuters who changed their travel times generally moved their travel towards the edges of the peak period, in other words, those who normally travel earlier in the peak period travelled even earlier and those who normally travel later travelled even later. It also appears that there was some shortening of working days for those who travelled earlier, this could be an affect of the school holiday period or the Games, with commuters perhaps leaving work earlier to be able to enjoy the Games.

Table 3.1 Average start time of commuting trips before and during the Games.

	Average start time of commuters who changed to an earlier travel time		Average start time of commuters who changed to a later travel time	
	Outward	Return	Outward	Return
Before the Games	07:40	17:15	08:15	18:00
During the Games	07:15	16:15	09:00	18:45

Source: TfL Personal Travel Panel Survey (wave 1 and 2).
 Base: 495 respondents (wave 1 and 2)

Understanding changes to Business Journeys

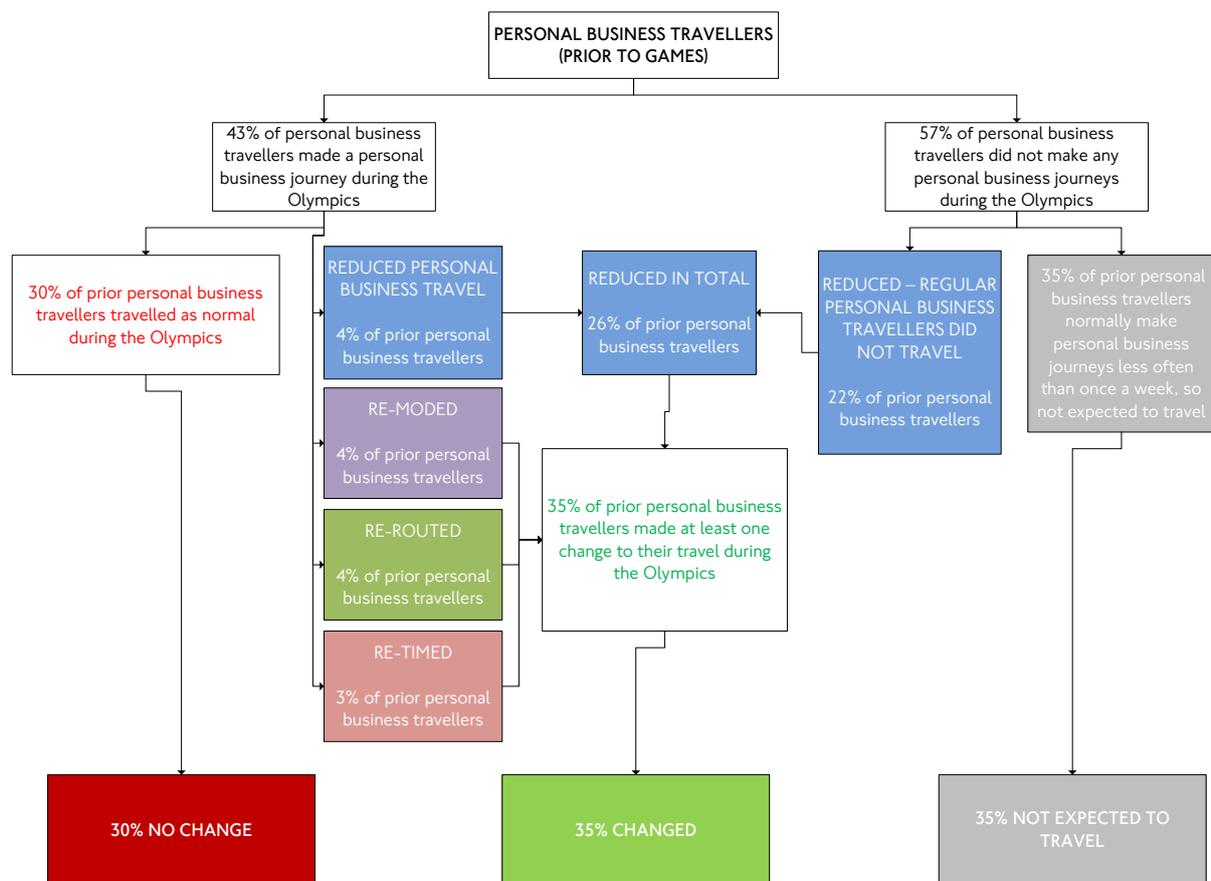
Business journeys normally make up 7 per cent of journeys on an average day. 1,647 respondents to the TfL Personal Travel Panel Survey undertook business journeys in London prior to the Games.

Magnitude of change to business journeys

43 per cent of those who were business travellers before the Games made a business journey during the Olympics. 26 per cent of business travellers reduced their travel during the Olympics and 35 per cent made at least one change to their travel during the Olympics. These figures take into account the frequency of business journeys before the Games and whether travellers would have been expected to make a business journey during the Games (i.e. it excludes those who made less than one business journey per week).

30 per cent of business travellers did not make any changes to their business journeys during the Olympics. 4 per cent made a business journey during the Games but reduced the number of business journeys they made, 4 per cent changed the mode of their business journeys at least once, 4 per cent changed the route of their journeys at least once and 3 per cent changed the time of their travel.

Figure 3.9 Summary of travel behaviour change by normal London business travellers during the Games.



Source: TfL Personal Travel Panel Survey (wave 1 and 2).
Base: 1,624 respondents (wave 1 and 2)

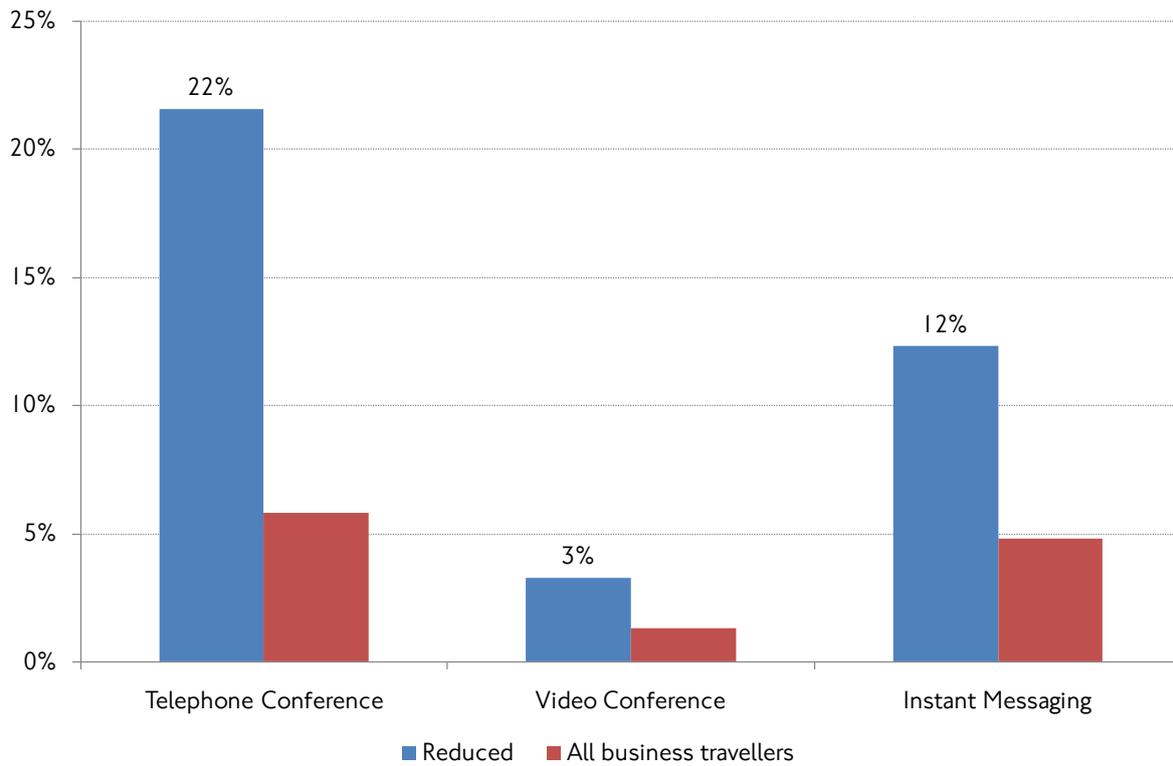
Reduction in business journeys

There was a reduction in the average number of business journeys made per week from 2.2 to 2.0 journeys for those made a business journey during the Games and 26 per cent of business travellers reduced their business travel either through reducing the number of journeys made or making no journeys during the Olympics.

The substantial decrease in business travel may indicate that business journeys are more discretionary than commuting journeys or can be more easily re-scheduled. It may also be a knock-on affect of the changes to commute travel, with meetings cancelled because attendees are working at home or at a different location to normal.

There was a small increase in the use of information and communications technology by all business travellers but there was a substantially larger increase amongst business travellers who reduced journeys during the Games. This suggests that although some meetings were postponed, some meetings continued to go ahead using technology to replace face to face meetings.

Figure 3.10 Proportion of business travellers who used Telephone Conferencing, Video Conferencing and Instant messaging more often during the Games.



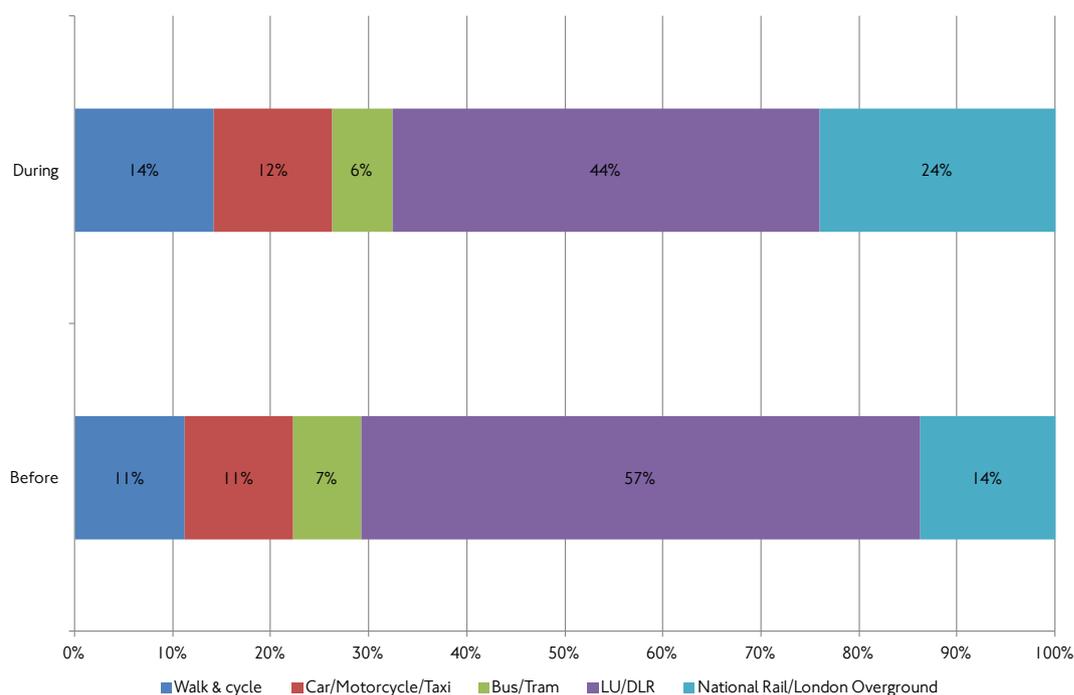
Source: TfL Personal Travel Panel Survey

Base: Telephone Conference - Those who reduce = 65, All business travellers = 398, Video conference - Those who reduced = 61, all business travellers = 385, Instant messaging - Those who reduced = 65, All business travellers = 398 (wave 2)

Changing the mode of travel for business journeys

Figure 3.10 shows the mode share before and during the Games of business travellers who changed mode. This shows mode shift away from London Underground and the DLR and towards National Rail, walk and cycle. Note the small base size for this analysis: just 70 business travellers changed mode.

Figure 3.11 Mode share of business trips before and during the Games for those who changed mode during the Games.



Source: TfL Personal Travel Panel Survey.
 Base: 70 respondents (wave 1 and 2)

Understanding changes in travel for non-work purposes

This section focuses on changes made to journeys for shopping, leisure, personal business and other purposes during the Games. Journeys for these purposes account for 76 per cent of all journeys in London on an average day. 2,324 respondents to the TfL Panel Survey made shopping, leisure, personal business and other journeys during the Games.

Between four and five in ten of those travelling for non-work purposes made a change to their travel, most of whom reduced their regular travel. This may in part reflect changes in leisure activities as a result of the Games, with Londoners for example choosing to take part in Games-related activities or stay at home to watch the Games rather than carry out their normal social activities. The choices made are quite different to those for commute and business travel, with changing mode the most (rather than least) popular change. Nevertheless, relatively few made any change to journeys other than reducing their travel.

Generally, when respondents changed their mode of travel for these journeys there was an increase in walking and cycling and a decrease in the use of London Underground/DLR, although this did vary by journey purpose.

Table 3.2 Changes to travel for shopping, leisure, personal business and other purposes during the Olympic Games, of those who would normally have made a journey during the period.

	Reduced	Re-timed	Re-routed	Re-moded	Many any change
Shopping	30%	7%	5%	8%	44%
Leisure	25%	5%	7%	9%	42%
Personal business	41%	4%	6%	6%	54%

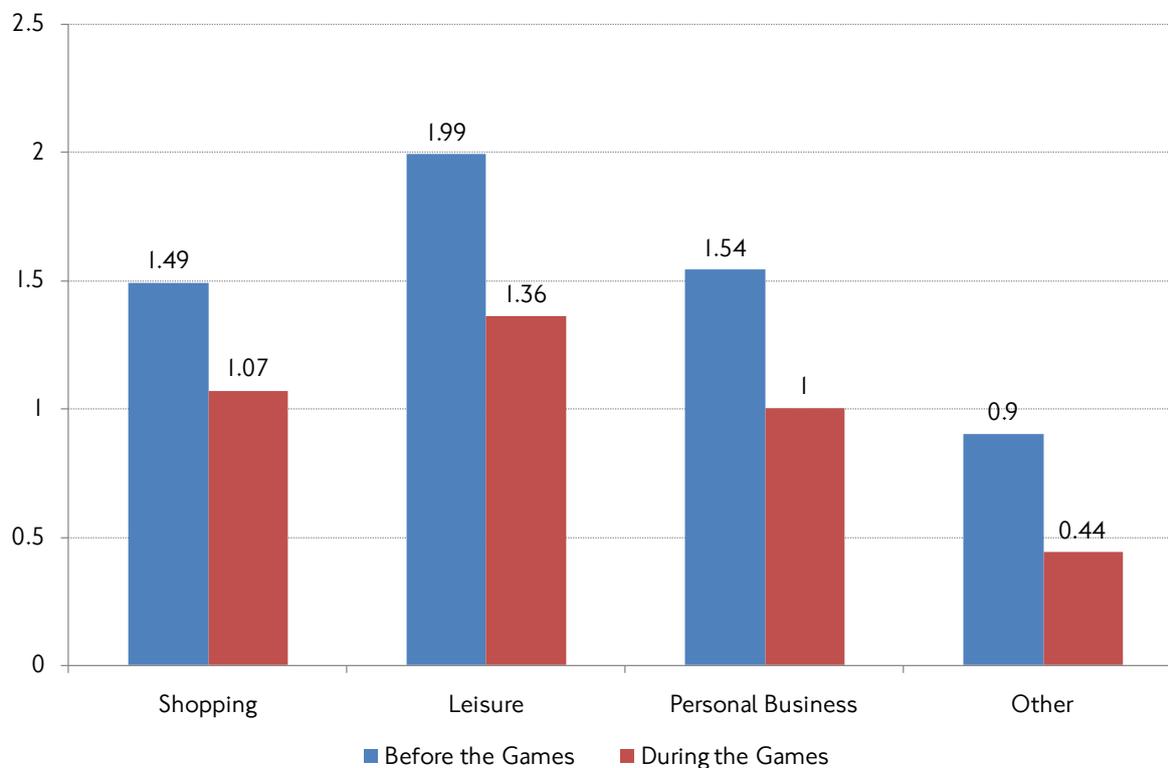
Source: TfL Personal Travel Panel Survey.

Base: 1,526 shoppers, 1,790 leisure travellers, 1,052 personal business travellers (wave 1 and 2)

Reduction in other journeys

Generally, those who are not in employment travel for shopping, leisure and other purposes more frequently than those who are employed. During the Games, there was a reduction in frequency of travel for all journey purposes for both groups. There was a larger percentage decrease for those who are not in employment compared to those in employment, although the frequency for those not in employment remained above the level for employed people.

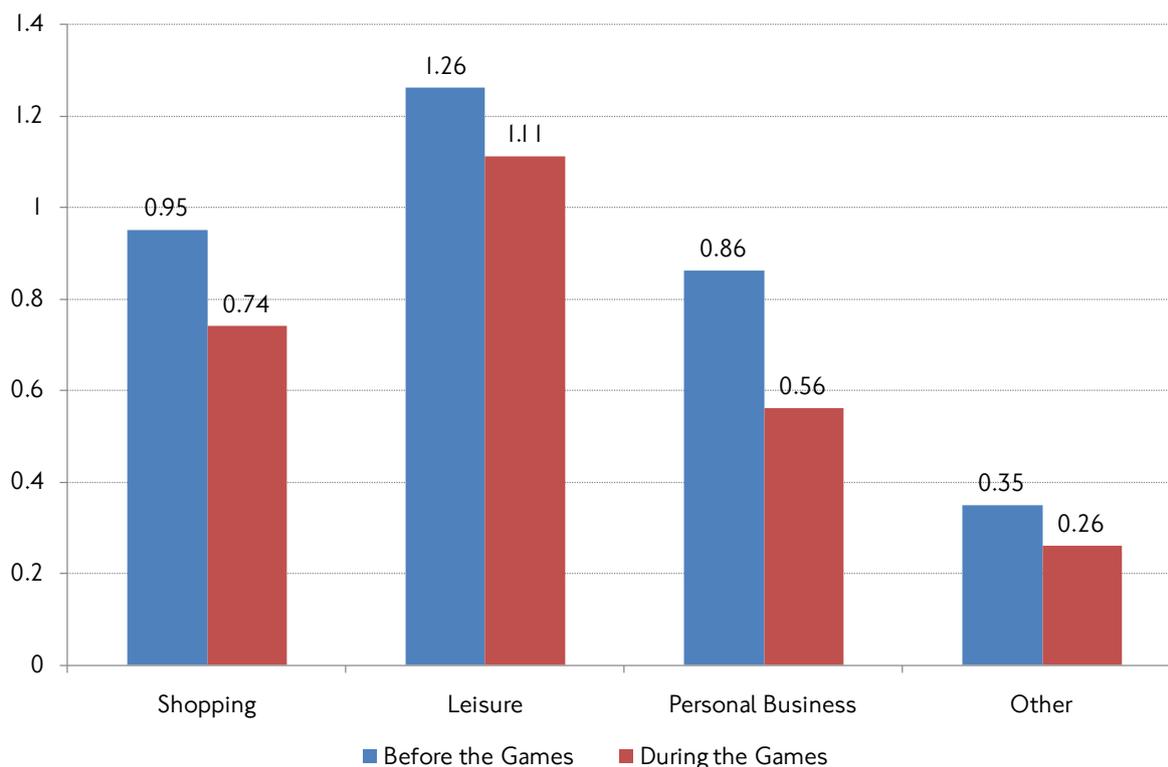
Figure 3.12 Frequency of other journeys by those in employment before and during the Games and by journey purpose.



Source: TfL Personal Travel Panel Survey.

Base: 1,526 shoppers, 1,790 leisure travellers, 1,052 personal business travellers (wave 1 and 2)

Figure 3.13 Frequency of other journeys by those who are not in employment, before and during the Games and by journey purpose.



Source: TfL Personal Travel Panel Survey.

Base: 1,526 shoppers, 1,790 leisure travellers, 1,052 personal business travellers (wave 1 and 2)

Sustained change

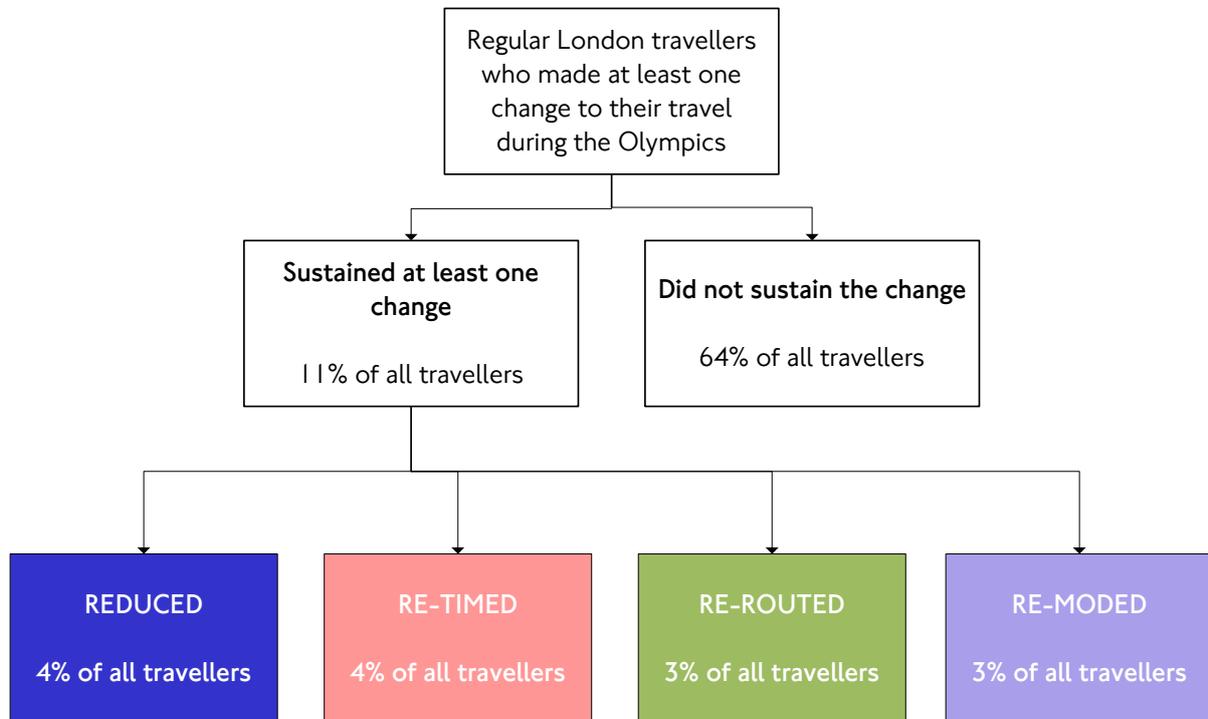
The goal of the Travel Demand Management and Active Travel Programmes was to change travel during the Games in order to ensure a successful Games and keep London moving. London travellers overwhelmingly responded to this message, with more than three quarters making some sort of change. Although, this was not the goal of the programme, it was anticipated that the Games may result in some sustained change to travel patterns. Never before has there been such a significant level of resource put into travel demand management and this provides an opportunity to understand whether this large scale programme and significant change in travel behaviour during the Games has had a longer term impact on travel behaviour since the Games. This section looks at whether any of the changes made during the Games have been sustained. Later in this report, there will be a discussion of how the experience of the Games has affected the way London travellers react to disruption. This will help to establish the implications of the Travel Demand Management programme for long term change to travel behaviour across London.

Understanding sustained change for regular personal travel

15 per cent of regular London travellers who made a change to their travel during the Games have continued with that change, equivalent to 11 per cent of all regular London travellers. Similar proportions of travellers have continued with each type of change. This is interesting because it demonstrates that, relatively speaking, reductions in travel were much more likely to be temporary, whereas other changes were relatively more likely to be sustained.

Non-work purpose travellers were somewhat more likely to have sustained the changes they made to their journeys (7 per cent) than travellers for commute (6 per cent) or business purposes (3 per cent).

Figure 3.14 Summary of regular London travellers who changed their travel during the Games and their behaviour since the end of the Games.



Source: TfL Personal Travel Panel Survey.
Base: 1,347 made at least one change during the Games (wave 1, 2 and 3)

Understanding sustained change to commuting journeys

6 per cent of London commuters have sustained the change they made to their commute, 9 per cent of those who made a change. As with all travellers there appears to be little difference in the proportions maintaining each type of change:

- 2 per cent continued to reduce their commute journeys;
- 2 per cent continued to re-time their commute journeys;
- 1 per cent continued to re-route their commute journeys; and
- 1 per cent continued to re-mode their commute journeys.

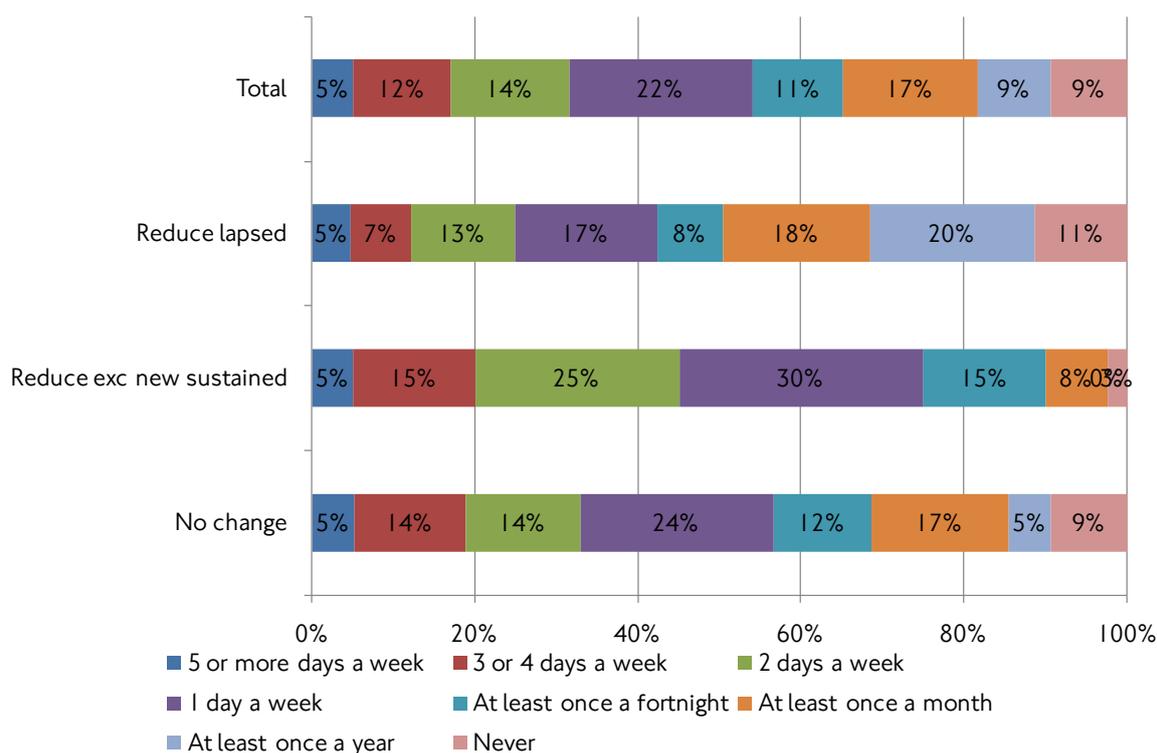
There had been no significant change in the mode share of commuting journeys when comparing all commute journeys before and during the Games. Of those who made a change to their mode of travel, there appears to have been increases in cycling and National Rail/London Overground and a decrease in walking (although some of this decrease is likely to be seasonal).

Focus on working from home

There has been a sustained change in working from home. Before the Games, 13 per cent of commuters worked from home at least one day a week and during the Games this increased to 26 per cent. Working from home has decreased since the Games, but remains higher than before the Games, with 20 per cent of commuters working from home at least once a week. The average number of days worked from home has increased from 0.3 days per week before the Games to 0.5 days per week since the Games for all commuters. The number of days worked at usual workplaces has reduced - from 4.5 days per week to 4.2 days per week.

Those who reduced their commuting journey during the Games (either by working from home or working from a different location) are more likely to intend to work from home at least once a week than those who did not reduce their commuting journeys during the Games (75 per cent compared to 57 per cent). Also, those who reduced their commuting journeys during the Games but have not sustained this change are the least likely to work from home once a week (42 per cent), possibly because they found the experience during the Games negative.

Figure 3.14 Expected frequency of working from home by whether a change was made during the Games and whether this change was sustained.



Note: Total = all commuters, Reduce lapsed = commuters who reduced their commutes during the Games but have not continued with this change, Reduce exc new sustained = commuters who reduced their commutes during the Games and have continued to commute less than before the Games, this excludes those who have reduced their commutes since the Games. No change = commuters who did not reduce their commutes during the Games.

Source: TfL Personal Travel Panel Survey.

Base: Lapsed = 149, Sustained = 50, No change = 350

Understanding sustained change to business journeys

Seven per cent of those who changed their business travel during the Games have sustained this change since the Games, equivalent to three per cent of all business travellers.

Reductions in travel were proportionately less likely to have been sustained than other changes, reflecting the fact that most business travellers reduced their travel by postponing their meetings:

- 1 per cent continued to reduce their business journeys;
- 1 per cent continued to re-time their business journeys;
- 1 per cent continued to re-route their business journeys; and
- 1 per cent continued to re-mode their business journeys.

Understanding sustained change to non-work purpose journeys

14 per cent of those who changed their non-work purpose travel during the Games have sustained this change since the Games, equivalent to seven per cent of all non-work travellers:

- 2 per cent continued to reduce their shopping, leisure and other journeys;
- 2 per cent continued to re-time their shopping, leisure and other journeys;
- 1 per cent continued to re-route their shopping, leisure and other journeys; and
- 2 per cent continued to re-mode their shopping, leisure and other journeys.

As before, travellers were relatively more likely to have sustained a change to the time, route or mode of their journeys than to the frequency of travel. Travellers for shopping, leisure and other purposes were more likely to have sustained a change than those travelling for work purposes. This may reflect the fact that these journeys are less frequent and travellers may be less expert in the options available to them, so there is a greater opportunity to find a better option.

Conclusion – Magnitude of change

In order to deliver a relatively modest change in overall background demand, a large number of people made modest changes to their travel patterns. The level of mass engagement required to deliver this change was possible due to the high profile of the event, and would be difficult to replicate in other circumstances. However, the magnitude of change varied considerably at a local level depending on both the anticipated impact of the Games and the level of engagement of people and businesses, with Canary Wharf providing the best example of a highly localised pattern of change driven by strong engagement. This perhaps provides a more relevant example for future planning, and shows that substantial change can be achieved at a local level where there is a strong motivation to act.

The type of changes made reflected the circumstances of the journey – business journeys were postponed and leisure activities adapted, whilst commuters were more likely to continue to travel but change their journey in some way. Over a longer period, it is more

likely that the choices for different journey purposes would converge, although the more discretionary a journey, the more likely it is to simply be abandoned in the face of adversity.

There was significant change in travel behaviour during the Olympic and Paralympic Games for all journey purposes, and around one in ten London travellers have sustained these changes after the Games. There is evidence of increased working from home as a result of the Games. Chapter 8 explores the longer term impact of the Games in greater depth.

4. Understanding the drivers of change

The Get Ahead of the Games campaign was probably the largest Travel Demand Management campaign ever undertaken in London, and represents a unique opportunity to learn about how London travellers respond to messages encouraging them to change their travel behaviour. The previous Chapter described the success of the campaign in encouraging London travellers to change their journeys; this Chapter explores reasons why the campaign was effective and what this might mean for similar campaigns in future. It explores who changed, who chose to sustain these changes, and who went back to normal. In particular, the Chapter covers:

- Who changed (and didn't change) – their personal and household characteristics, where they live, and where they work;
- Whether prior experience of change or attitudes to change related to the choice to make changes during the Games;
- The impact of the Games Travel Demand Management campaign on the choice to change travel patterns during the Games; and
- Whether expectations and experiences of network performance influenced the choice to change travel patterns during the Games.

This Chapter draws on the TfL Personal Travel Panel Survey, waves one to three. The methodology of this survey is described in Chapter 2.

Key findings:

- Although we typically think of commute journeys as habitual, in fact most commuters have experience of varying their journey: 30 per cent sometimes or often vary their journey, 45 per cent try to make their journey in the same way every day and only change when they have to, and a quarter always travel in the same way.
- London commuters who vary their journey to work more often were more likely to have planned to change and to have changed their journey during the Games, but in all groups more than half did make a change.
- London commuters who were more positive about change in principle were more likely to plan to change and to have changed their journey to work during the Games. For example, 75 per cent of those who agreed that changing their travel may help them find new or better options for their journey made a change, compared to 59 per cent of those who disagreed.
- London commuters who thought it would be easier to make a specific change were more likely to plan to make that change but this made less difference during the Games. This may be because during the Games circumstances meant that the ease of change was different, or that they needed to make changes not considered easy.
- The majority of London commuters were not previously considering changing their journey to work (other than any changes necessitated by the Games), with 32 per cent considering change or had tried changing since the beginning of the year.

- There is a relationship between how likely commuters were to say they were considering changing their journey in normal conditions and how likely they were to vary their journey when faced with disruption, with those considering change also more likely to vary their journey. Those who vary their journey also appears to be more amenable to change.
- Commuters who were more amenable to change, demonstrated by being more likely to vary their journey in response to disruption, having a positive attitude to change, or positioning themselves on the route to behaviour change, were more likely to sustain a change to their travel behaviour after the Games.
- London travellers (for all purposes) who were aware of the Get Ahead of the Games tools and who had used them were more likely to plan to change their travel and more likely to change their travel during the Games. This suggests that it is unlikely that this volume of travel behaviour change would have occurred without any intervention.
- London travellers who expected the network to perform badly were more likely to plan to change their travel behaviour than those who expected it to perform well. But, in the event, nearly all respondents agreed that the network had performed well, and there was very little difference in changes made by expected performance. This may be because it became clear quite quickly that the network was performing better than expected, and therefore other factors became more important in predicting choices.

Characteristics of changers compared to those who travelled as normal

This section compares the characteristics of those who made a change to their normal travel patterns during the Games and those who did not make a change.

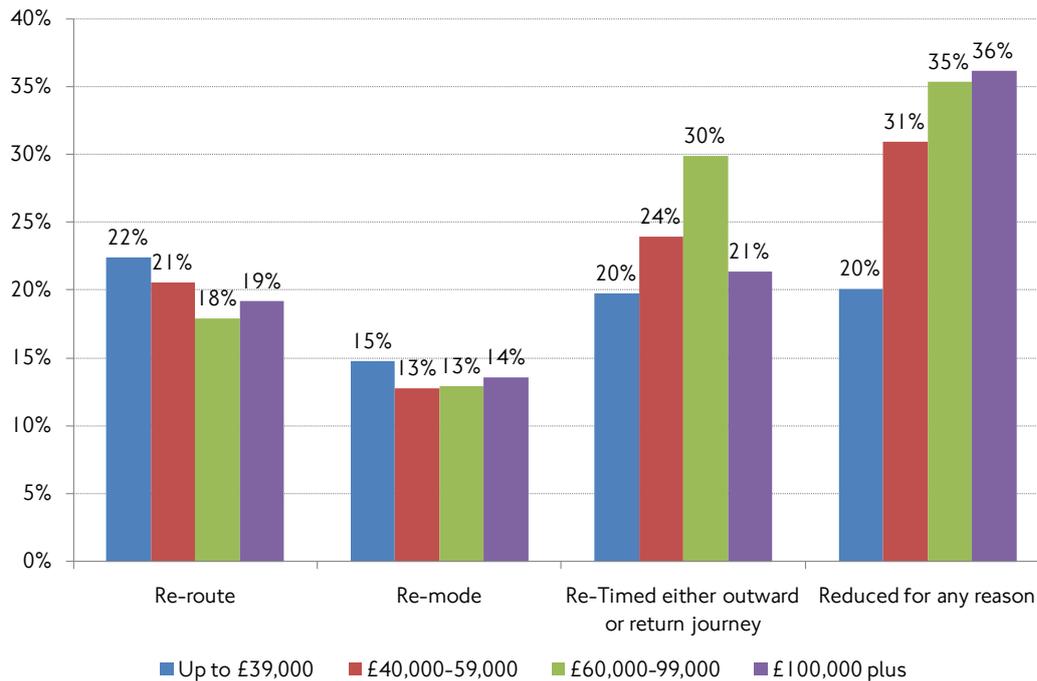
Demographics

The demographic profile of individuals largely did not explain the changes they made to their normal travel patterns during the Games. For example:

- A slightly higher proportion of females (55 per cent) made a change to their normal travel patterns than males (45 per cent). This may reflect the fact that women are more likely to travel for non-work purposes.
- There were no differences in the choice to change travel patterns or the type of changes made during the Games by age or household structure.

Household income did not have an impact on whether or not London travellers made a change to their journeys during the Games, but those on higher incomes were more likely to reduce their travel during the Games, with those 36 per cent of those with a household income over £100,000 per year reducing their travel at least once during the Games compared to 20 per cent of those with a household income of less than £39,000 per year (see Figure 4.1). In particular, higher earners were more likely to have worked from home, worked from a different location and taken annual leave.

Figure 4.1 Proportion of London travellers who made a change to their normal travel patterns during the Games, by household income.



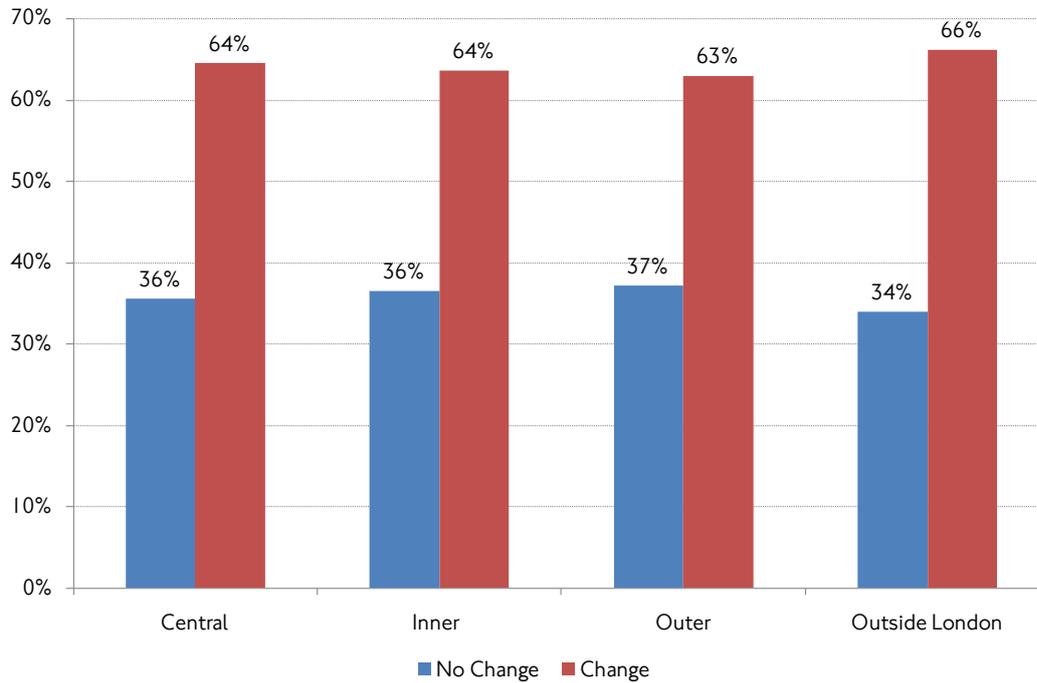
Source: TfL Personal Travel Panel Survey
 Base: 1,331 respondents (wave 2)

Geography

The impact of the Games was not uniform across London: there were some areas which saw large increases in travel demand (e.g. Central London, areas close to Games venues and close to the ORN and PRN) and also some areas which would have experienced virtually no Games impact (for example, areas of outer London). We would therefore expect to see those who either work or live in central London to be more likely to have made changes to their travel patterns during the Games. However, the location of an individual's home and work does not appear to have had an influence on their travel behaviour during the Games.

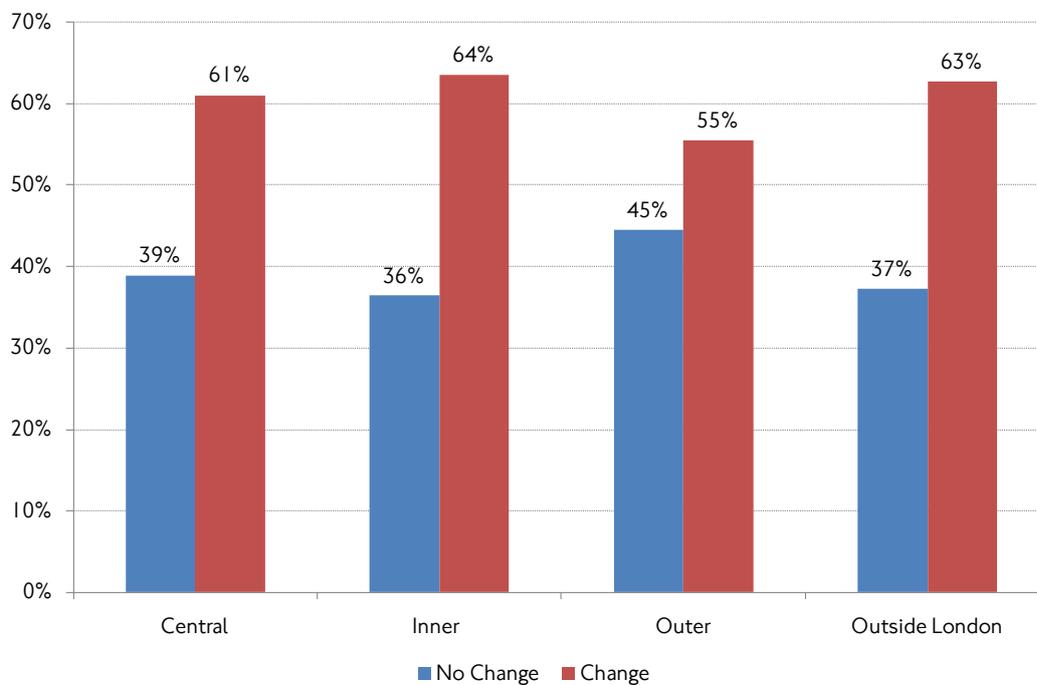
The charts below show that home and work location had only a small impact on whether or not individuals changed their travel. Those who work in Central, inner and outside London were more likely to have made a change to their normal travel during the Games than those living in outer London.

Figure 4.2 Proportion of London travellers who made a change to their normal travel patterns during the Games, by home location.



Source: TfL Personal Travel Panel Survey
Base: 1,472 respondents (wave 2)

Figure 4.3 Proportion of London travellers who made a change to their normal travel patterns during the Games, by work location.



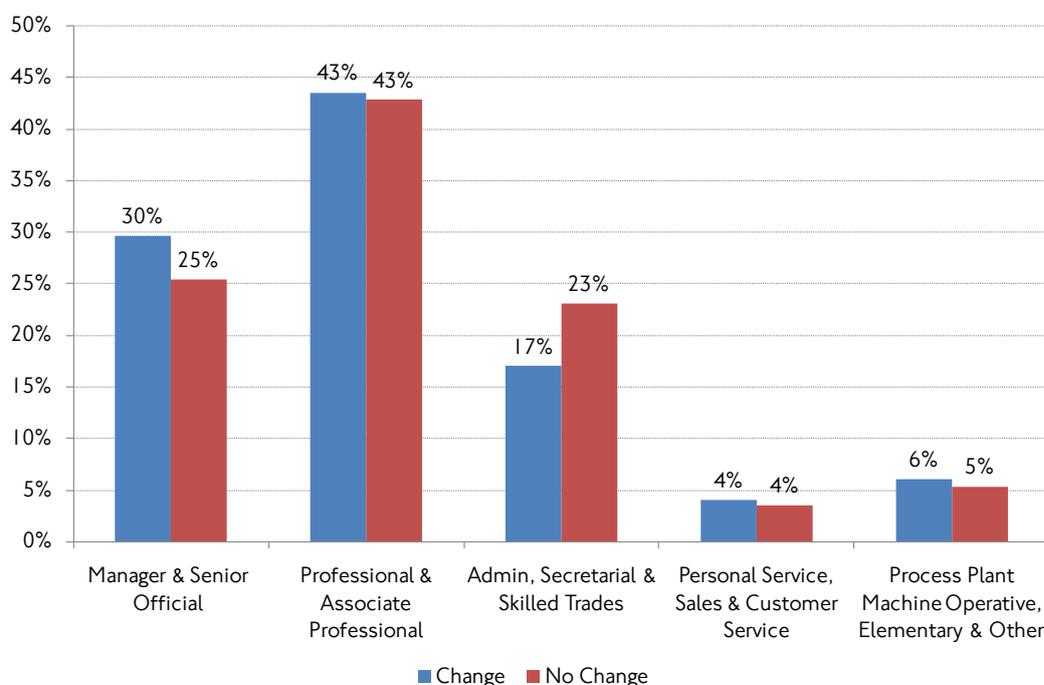
Source: TfL Personal Travel Panel Survey
Base: 1,253 respondents (wave 2)

Working patterns

As shown in Figure 4.4, Managers and Senior Officials were more likely to change their travel behaviour and those in administrative, secretarial and skilled trades were less likely to change their travel, but overall the differences by occupations were fairly minimal. Workers who changed their travel were more likely to work in large businesses, reflecting engagement with the TAB programme and the greater resources devoted to business continuity in such organisations (See Figure 4.5).

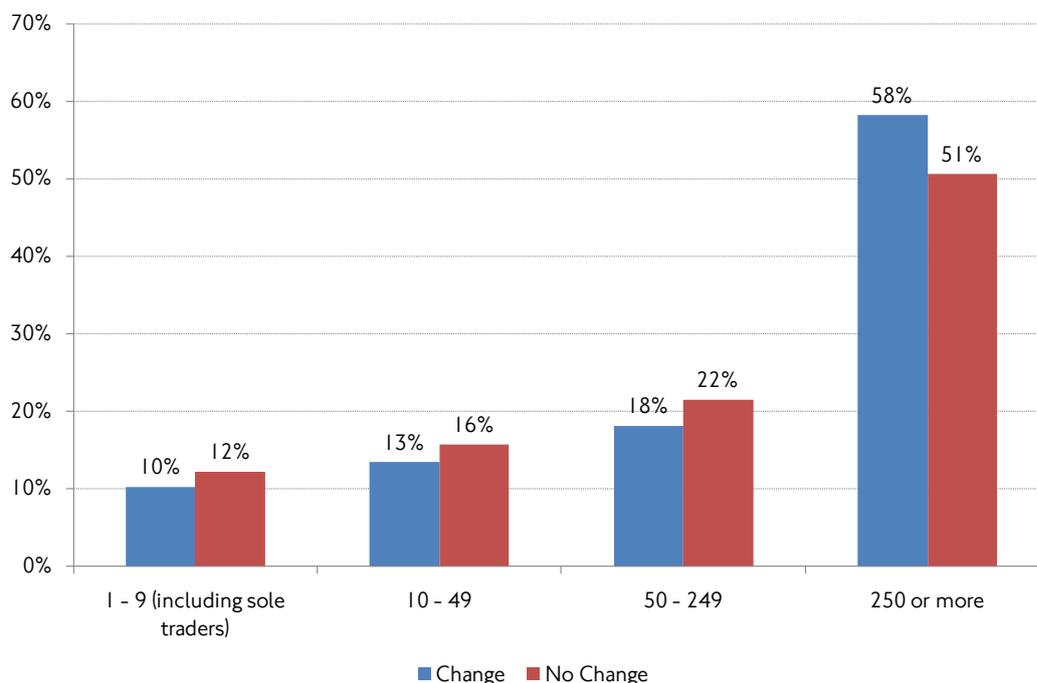
At an individual level, there was little difference in travel behaviour change by industry sector, although those in the financial and business services and public administration and defence industries were more likely to change than other industries (84 per cent of those working in public administration changed and 81 per cent of those working in the financial and business services sector compared to 77 per cent of all). This is likely to be because these two industries were the most engaged in the TDM programme.

Figure 4.4 Proportion of London travellers who made a change to their normal travel patterns during the Games by employment type.



Source: TfL Personal Travel Panel Survey
Base: 1,494 respondents (wave 2)

Figure 4.5 Proportion of London travellers who made a change to their normal travel patterns during the Games by number employed by the business they work for.



Source: TfL Personal Travel Panel Survey
Base: 1,505 respondents (wave 2)

How experience of and attitudes to change affected choices

Experience of travel change in day-to-day life

The previous section demonstrated that there were very few differences in patterns of change between different demographic groups or by place of residence or work. So what does distinguish those who changed from those who travelled as normal? This section explores the relationship between prior experience of change and attitudes to change, and the choice to make changes to journeys during the Games. It asks the question: did those who have more previous experience of varying their journeys, or who are more positive about change, typically change more?

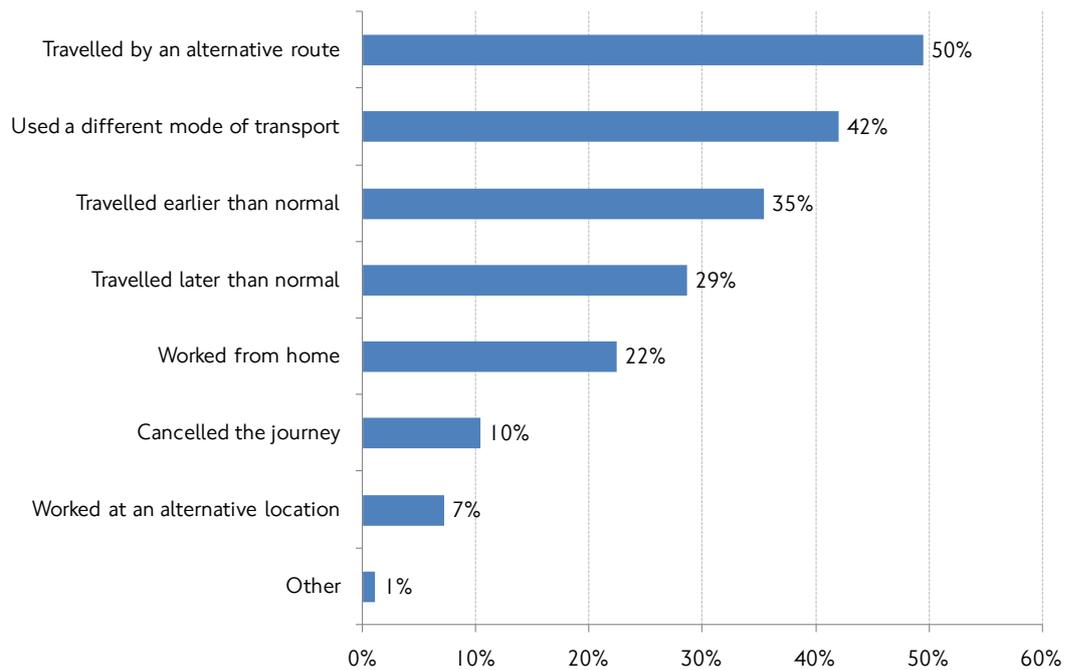
Although we typically think of commute journeys as habitual, made in the same way every day, in fact most London travellers have some experience of making their commute journey in a different way. Before the Games, just a quarter of London commuters said that they always make their journey in the same way, with the majority of travellers sometimes varying the way they make the journey, typically in response to disruption: 45 per cent said that they try to make the journey in the same way everyday, and only make changes when they have to. 26 per cent sometimes vary the way they make their journey, and 4 per cent do so often.

Figure 4.6 shows changes that commuters have made to their journey in response to disruption. The most popular changes in response to disruption are to travel using the same mode, but by a different route, or to travel by a different mode. As well as having made changes in response to disruption on the transport network, many commuters had made

changes to their journey for other reasons, with the most common change being to have travelled earlier or later than usual (See Figure 4.7).

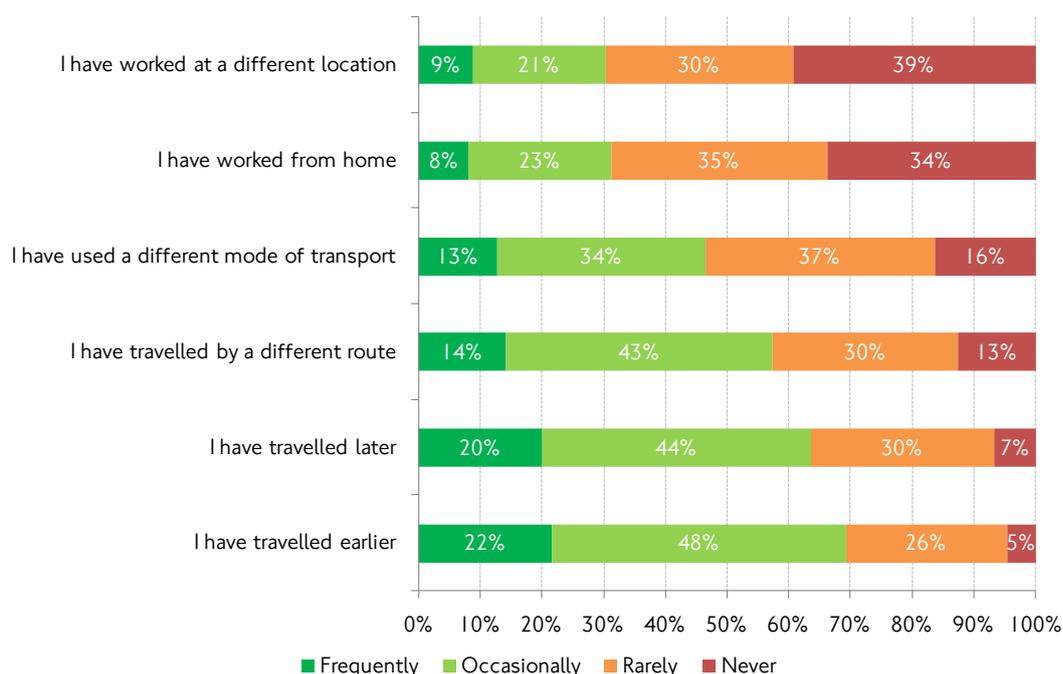
Interestingly, commuters tend to make different changes in response to disruption than in response to other causes of variability, such as work pressures or personal commitments. So, when faced with disruption the most common response is to change route or mode, whereas the change most commonly made on a day-to-day basis is to the time of commute journeys. The change London commuters were least likely to have experienced was working at another location than home or their normal workplace.

Figure 4.6 Changes made to commute journey in response to disruption.



Source: TfL Personal Travel Panel Survey
Base: 1,260 respondents (wave 1)

Figure 4.7 Changes made to commute journey on day-to-day basis.



Source: TfL Personal Travel Panel Survey
 Base: 1,260 respondents (wave 1)

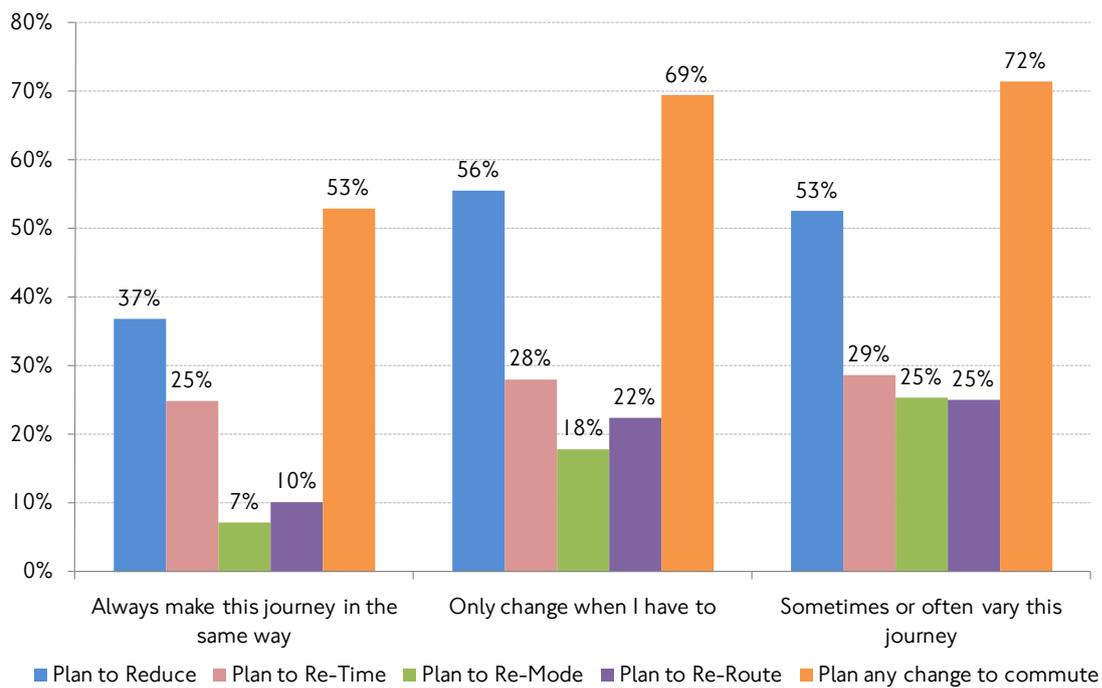
Impact of experience of variability on changes made during the Games

London commuters who vary their journey to work more often were more likely to have planned to change their travel during the Games and more likely to actually change their behaviour during the Games. In particular, commuters who say they always make their journey in the same way were much less likely to plan to reduce their travel or to change the mode or route used. Just 53 per cent of commuters who never change their journey to work were planning to make any change during the Games, compared to 69 per cent of those who change their journey in response to disruption and 72 per cent of those who sometimes or often vary their journey (See Figure 4.8). During the Games, the proportion making any change was slightly lower, but the relationship with prior experience of change held true, with 53 per cent of those who normally always travel in the same way making a change to their journey, compared to 64 per cent of those who vary their journey in response to disruption and 67 per cent of those who sometimes or often vary their journey (See Figure 4.9).

Those who vary their travel in response to disruption were more likely to be planning to reduce their journey and less likely to plan other changes than those who sometimes or often vary their journey normally. During the Games, these two groups were equally likely to reduce their journey or change the time of the journey, but those who typically vary their journey were more likely to change mode or route than those who only change when faced with disruption.

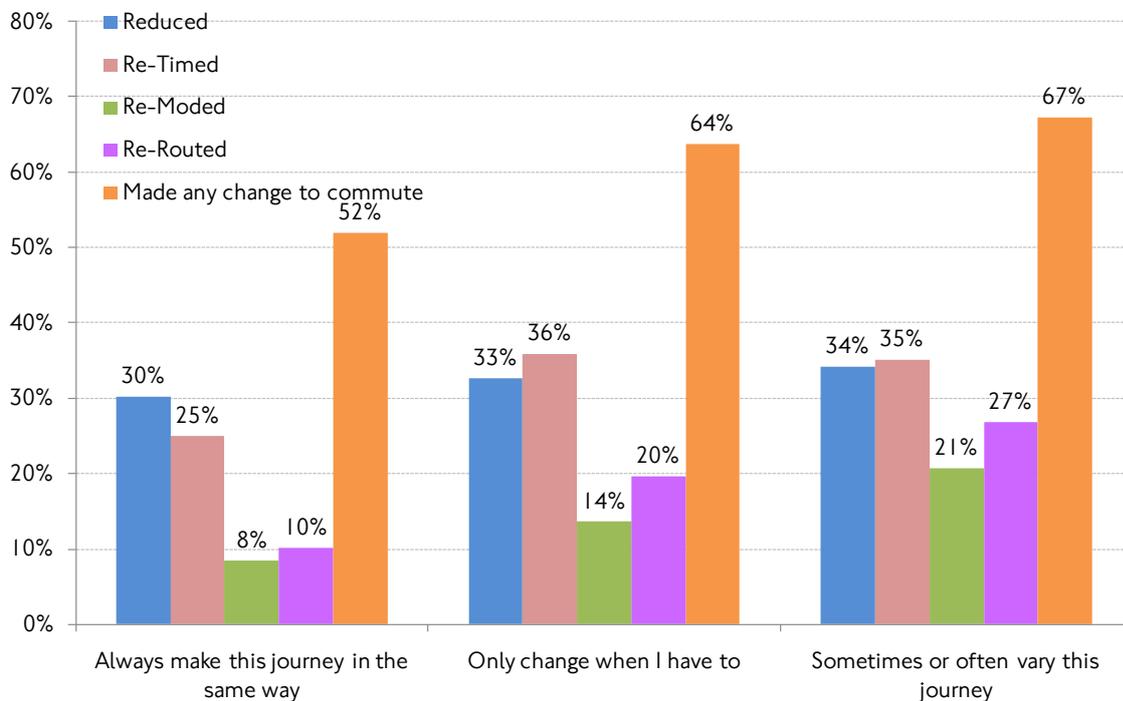
It is clear that prior experience of change was significant in determining whether commuters would change their travel during the Games, but also that the impact of the Games was substantial enough that even those who never normally change were encouraged to do so.

Figure 4.8 Experience of change by whether planned to change commute during the Games.



Source: TfL Personal Travel Panel Survey
 Base: 1,260 respondents (wave 1)

Figure 4.9 Experience of change by whether changed commute during the Games.



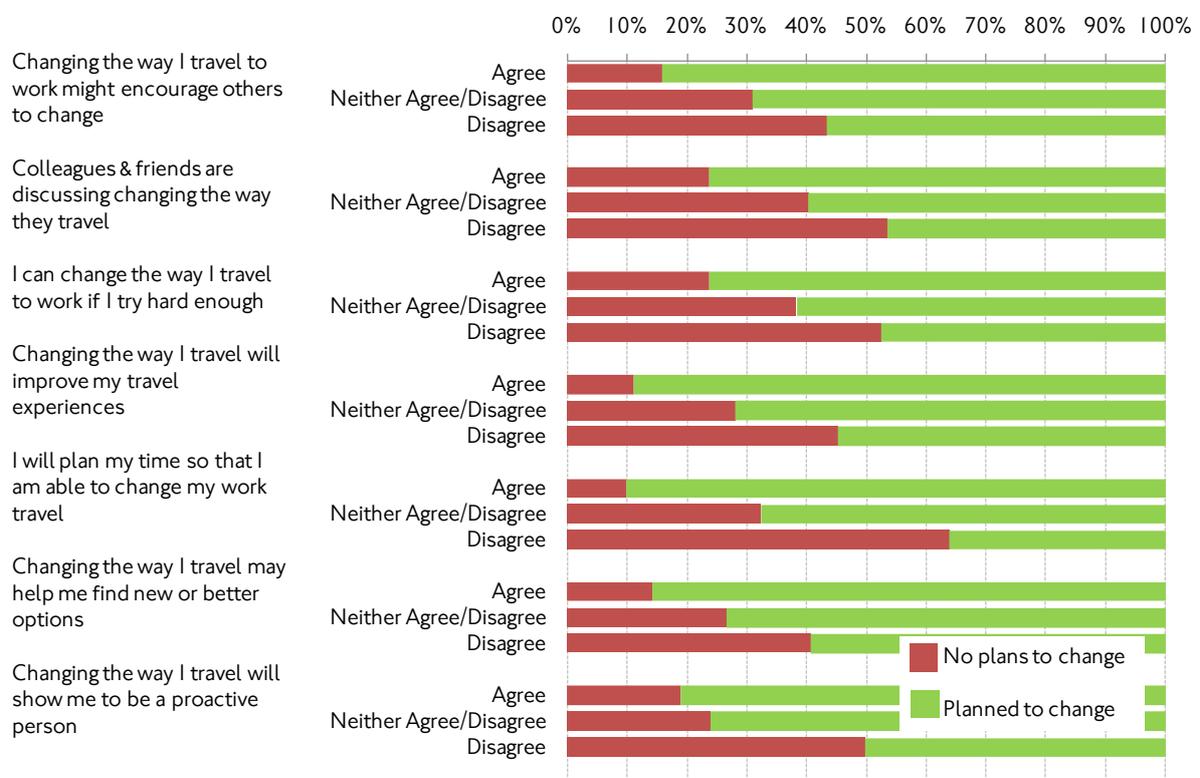
Source: TfL Personal Travel Panel Survey
 Base: 1,260 respondents (wave 1 and wave 2)

Impact of attitudes to change on changes made during the Games

Figures 4.10 and 4.11 show that respondents who were more positive about change in principle were more likely to plan to change their commute and more likely to actually do so during the Games. The biggest differences were:

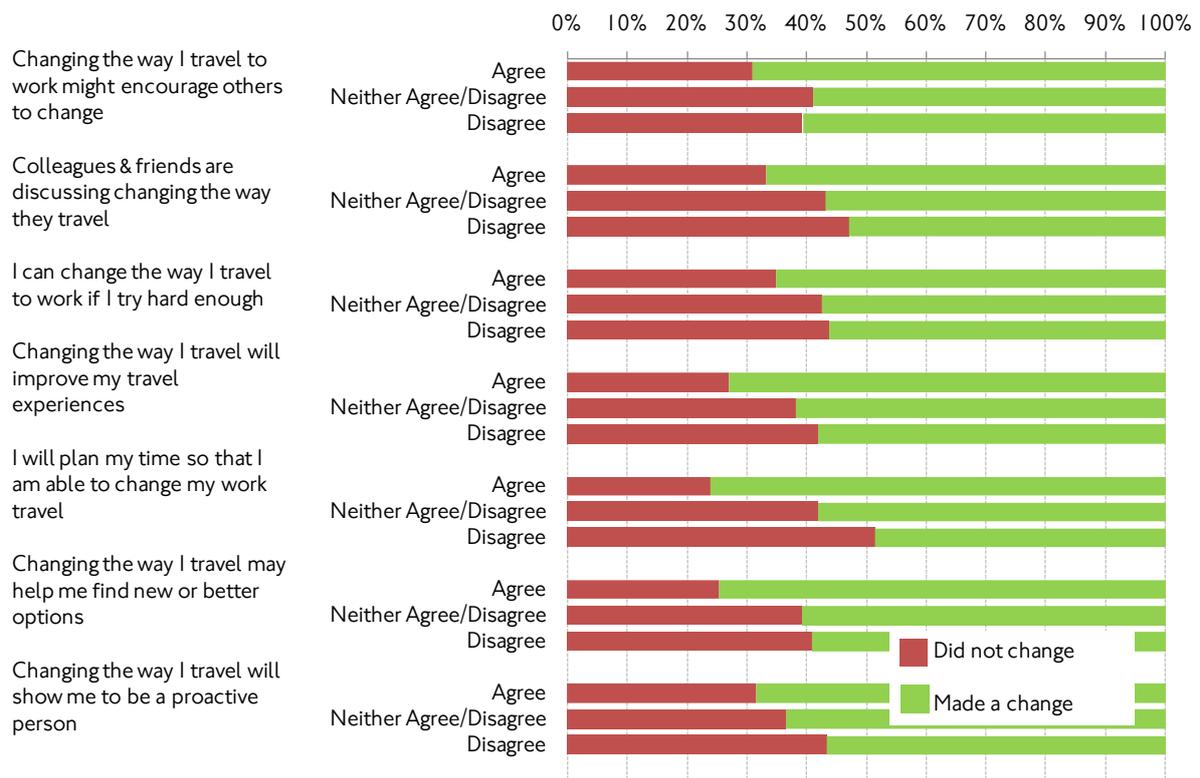
- 76 per cent of those who agreed “I will plan my time so that I am able to change my work travel” changed, compared to 49 per cent of those who disagreed;
- 75 per cent of those who agreed “Changing my travel may help me find new or better options for my journey” changed, compared to 59 per cent of those who disagreed; and
- 73 per cent of those who agreed “Changing the way I travel during the Games will improve my travel experiences” changed, compared to 58 per cent of those who disagreed.

Figure 4.10 Ease of change by whether planned to change commute during the Games.



Source: TfL Personal Travel Panel Survey
Base: 1,260 respondents (wave 1)

Figure 4.11 Ease of change by whether changed commute during the Games.



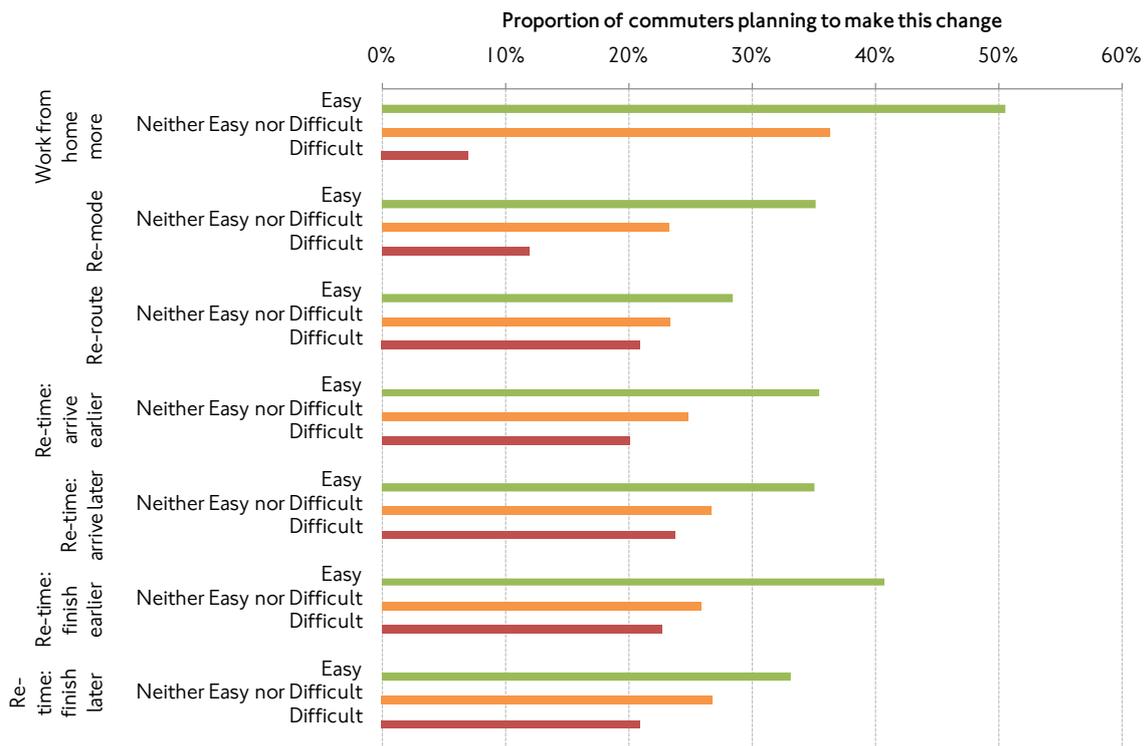
Source: TfL Personal Travel Panel Survey
 Base: 1,260 respondents (wave 1 and wave 2)

Impact of ease of change on changes made during the Games

There was a clear relationship between how easy commuters thought it would be to make a change and how likely they were to have planned to make that change during the Games, with those who thought a change would be easy more likely to plan to do it (See Figure 4.12).

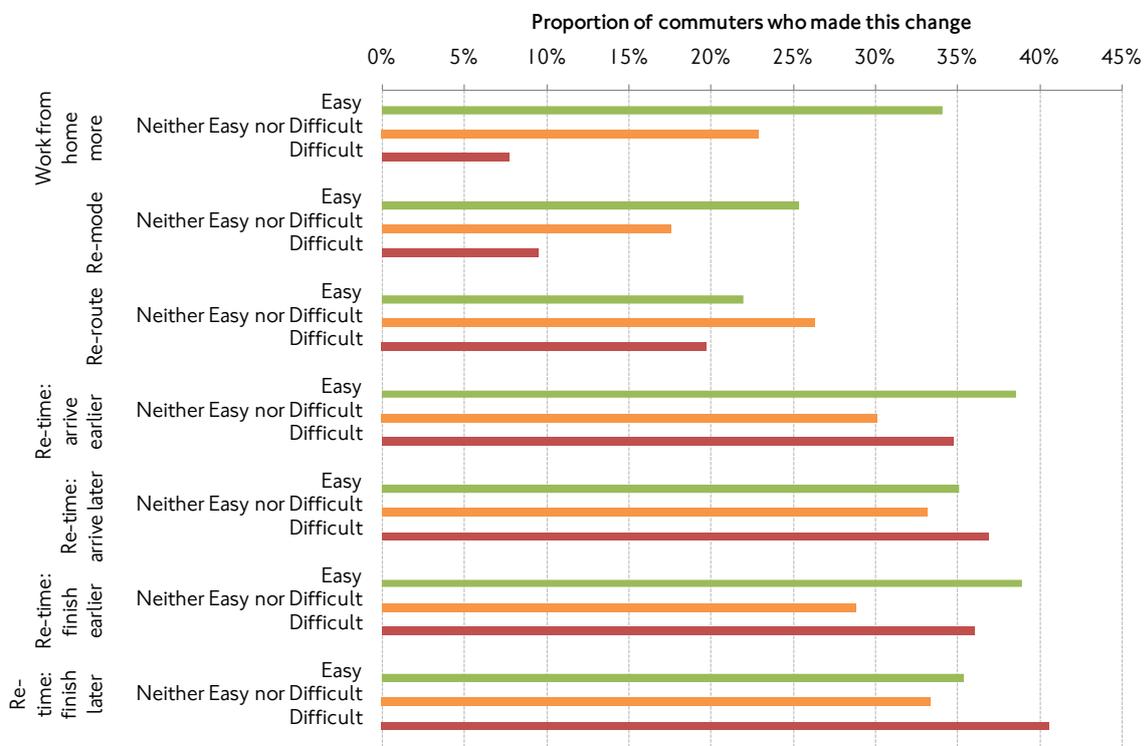
However, the relationship between ease of making a change and the changes actually made during the Games was less clear cut. For re-moding and working from home, the evidence suggests that commuters who said it would be hard to make a change were less likely to make that change than commuters who thought it would be easier. However, this did not seem to be the case for re-timing or changing route, where there was no difference in the likelihood of commuters re-timing based on how easy or difficult they thought it would be (See Figure 4.13). This suggests that changes made may have been driven more by circumstance during the Games, meaning that commuters may have needed to make changes they did not find easy. Or it may reflect events during the Games which altered how easy a change was to make (for example, employers changing their attitudes to working hours).

Figure 4.12 Ease of change by whether planned to change commute during the Games.



Source: TfL Personal Travel Panel Survey
Base: 1,260 respondents (wave 1)

Figure 4.13 Ease of change by whether planned to change commute during the Games.



Source: TfL Personal Travel Panel Survey
Base: 1,260 respondents (wave 1 and wave 2)

Understanding how change happens

On an aggregate level, travel behaviour in London changes very little and very slowly. Underneath this relative stability at the aggregate level is a much greater level of change at the individual and household level. This is known as 'churn' and can be triggered by a number of factors including changing your home, job or school; life stage changes such as having a baby; a change in health or mobility or other personal circumstances; a change in costs, service availability or quality; or the desire to make a lifestyle change such as getting fit.

These triggers are characterised as 'push' factors that deter people from their previous choice of mode (such as crowding, congestion or fares increases) and 'pull' factors that encourage people towards an alternative or generate new trips (such as new services, infrastructure or information). In addition certain macro-environmental factors can influence choice-making, for example, the state of the economy or the success of the British cycling team at the Olympics.

Very broadly, people make 'common sense' choices for their trips, taking into account (largely automatically) the value they place on the trip and their time, their disposable income, and the options available to them. These individual choices may be influenced by many factors, including attitudes, social norms, and habit, which vary considerably by life stage, ethnicity, social group and geography. However, inertia also plays a major part in this decision-making process.

Most people do not spend much time thinking about the way they travel and generally just make the same choices they made before, using 'rule of thumb' assumptions. An event such as the Olympics has the effect of changing the conditions to such an extent that travellers are no longer able to follow their normal habits and must think about how to make the journey afresh. In normal conditions, research suggests that the process of behaviour change is a gradual one, involving a transition from considering change, testing out options, and slowly committing to the change made until that new behaviour itself becomes habit. Typically, many people will be considering making a change, but require an external trigger to do so. For some, the experience of the Games may have acted as a trigger. This Section explores the relationship between prior consideration of behaviour change and choices made during the Games.

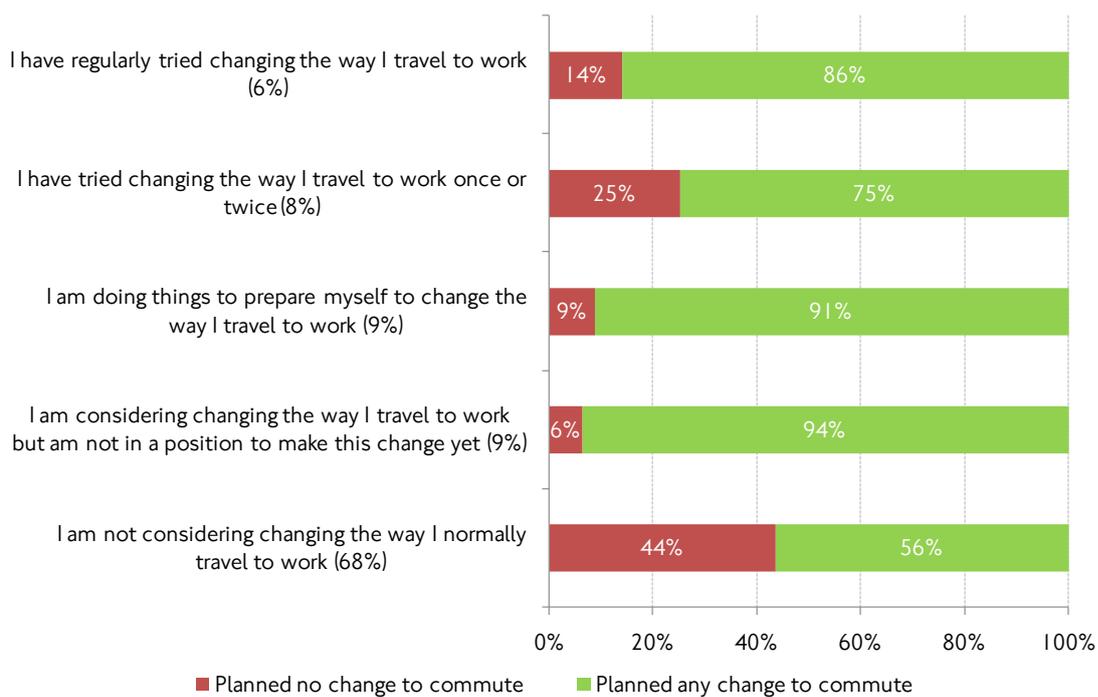
The majority of London travellers were not considering changing their normal travel behaviour patterns, other than for the Games. 68 per cent said that they were not considering changing the way they normally travel to work. 32 per cent placed themselves somewhere in the process of considering changing their travel or actually starting to change the way they normally travel. There is a clear correlation between how likely commuters are to vary their travel on a day-to-day basis and where they position themselves in this theoretical model of behaviour change:

- Of those who said they were not considering changing the way they normally travel to work, 31 per cent said they always make the journey in the same way and 46 per cent that they only change when they have to, with 22 per cent sometimes or often changing their journey.
- In comparison, just 9 per cent of those who are considering or trying out changing their commute say they always make their journey in the same way, 43 per cent that they only change when they have to and 48 per cent sometimes or often change their journey to work.

So, we can assume that commuters who position themselves as being somewhere on the route to behaviour change are more amenable to changing their journey when faced with disruption. It would be expected, therefore, that this group would also be more responsive to Travel Demand Management activity for the Games, and this is borne out by the data, as described below.

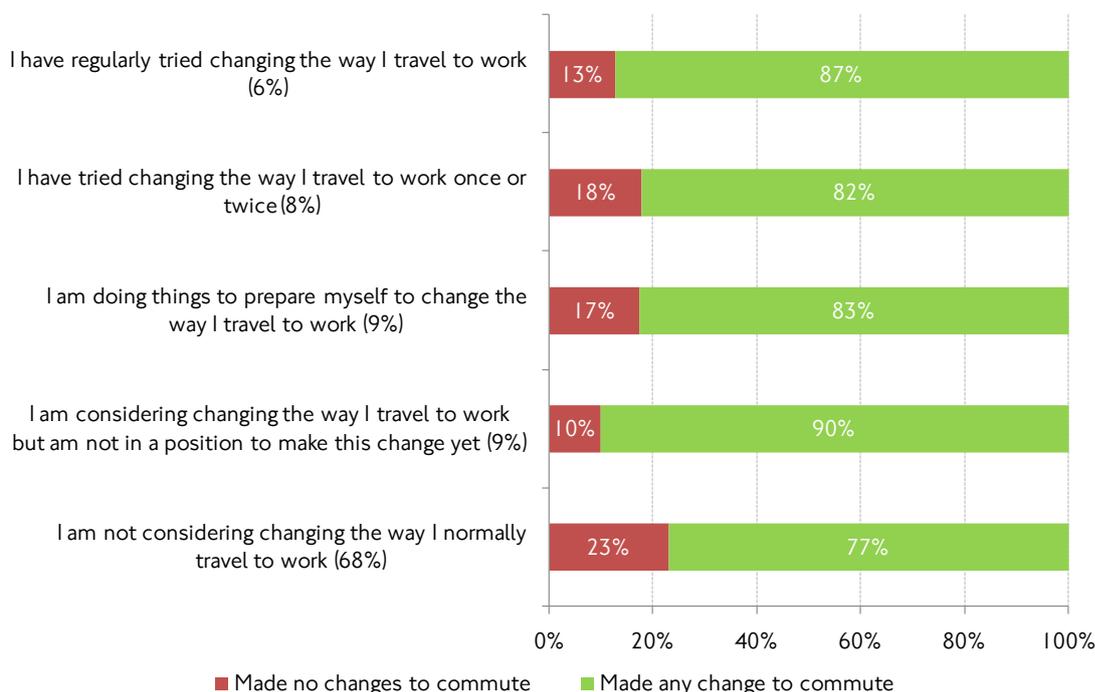
Figures 4.14 and 4.15 explore planned and actual change by where London commuters position themselves in this theoretical model of behaviour change. There is a clear difference between the plans and actual choices made by those who say they are not considering changing their commute, and those who describe themselves as on the road to behaviour change. On average, 87 per cent of those who described themselves as being on the road to behaviour change had planned at least one change to their commute journey, compared to 56 per cent of those who were not previously considering changing their normal journey. In the event, the differences were somewhat less, with 85 per cent of those on the road to behaviour change, changing their journey during the Games, compared to 77 per cent of those not considering changing their journey. There are no clear differences between the other groups, although this may simply reflect the small sample sizes.

Figure 4.14 Consideration of change to normal commute travel by whether planning to make any changes to commute journeys during the Games.



Source: TfL Personal Travel Panel Survey
Base: 1,260 respondents (wave 1)

Figure 4.15 Consideration of change to normal commute travel by whether made any changes to commute journeys during the Games.



Source: TfL Personal Travel Panel Survey
 Base: 1,260 respondents (wave 1 and wave 2)

Impact of experience and attitudes on whether change was sustained

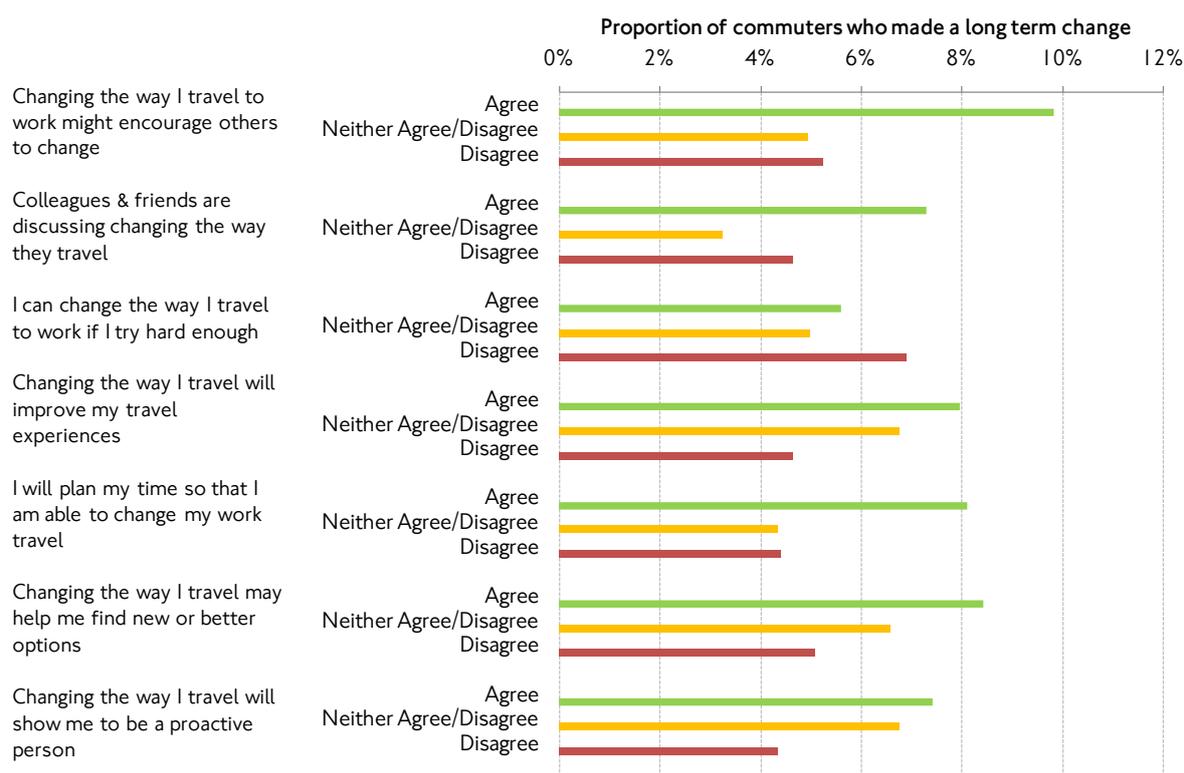
We can see that London commuters with greater experience of varying their travel on a day-to-day basis, and who were more amenable to change, were more likely to change their travel during the Games. Prior experience of varying travel patterns, attitudes to change and to how easy change would be, and where people positioned themselves in the theoretical model of behaviour change, all appeared to predict their likelihood of changing. But would these characteristics also make them more likely to sustain those changes after the Games?

The majority of commuters did not sustain the changes made during the Games. But commuters who sometimes or often vary their commute journey and those who describe themselves as considering or trying out changing their travel were significantly more likely to sustain a change to their commute journey:

- 8 per cent of London commuters who sometimes or often vary their journey sustained a change to their commute, compared to just 4 per cent of those who never vary their journey; and
- 11 per cent of London commuters who are considering or trying out changing their journey sustained a change to their commute, compared to just 4 per cent of those who say they are not considering changing their journey to work.

On the whole, as shown in Figure 4.16, those with a positive attitude to changing their travel were more likely to have sustained a change to their commute journey than those less amenable to change.

Figure 4.16 Whether sustained a change to commute travel by attitude to change.



Source: TfL Personal Travel Panel Survey
Base: 1,260 respondents (wave 1 and wave 3)

Impact of Get Ahead of the Games tools on travel behaviour change

It is clear that some groups were more amenable than others to messages encouraging them to change. It could simply be that those who were more amenable to change, changed. This Section explores whether those who were more aware of the messages and had used or planned to use the tools were more likely to change.

Awareness and planned use of tools by whether planned to change

The first wave of the survey was undertaken in June and July 2012, immediately before the start of the Games. By this time, awareness was very high of the Get Ahead of the Games campaign and many travellers had already started using the tools available:

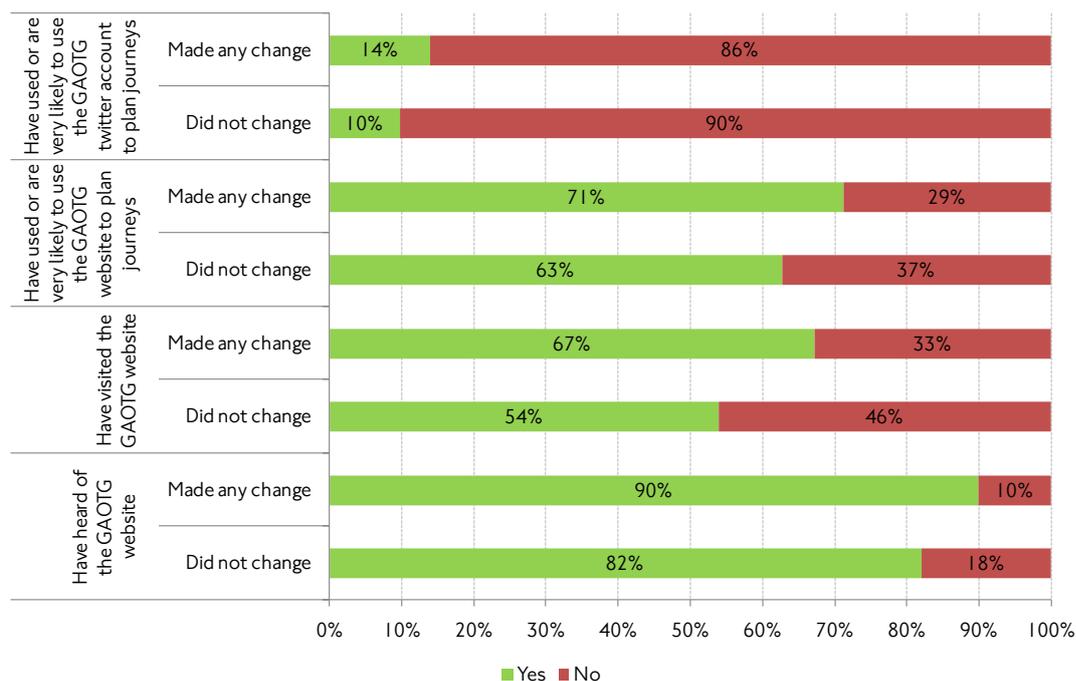
- 88 per cent of London travellers were aware of the Get Ahead of the Games website before the Games;
- 64 per cent had visited the site and 69 per cent were planning to use it to plan their journeys during the Games; and
- 13 per cent were planning to use the Get Ahead of the Games Twitter account to plan their journeys during the Games.

London travellers who had heard of the Get Ahead of the Games website prior to the Games were also more likely to be planning to change their travel patterns during the Games. 94 per cent of those who were planning to change their journeys during the Games were aware of the website, compared to 83 per cent of those who were not planning to change their travel. This relationship held for travel by all journey purposes.

Awareness and planned use of tools by travel behaviour change

Those who were aware of the Get Ahead of the Games tools and were planning to use them were significantly more likely to change their travel patterns during the Games, as shown in Figure 4.17. They were also more likely to make more than one of the four types of change – reduce, re-time, re-route and re-mode – so that for example 73 per cent of those who had visited the website prior to the Games made more than one type of change during the Games, compared to 67 per cent of those who had not visited the site.

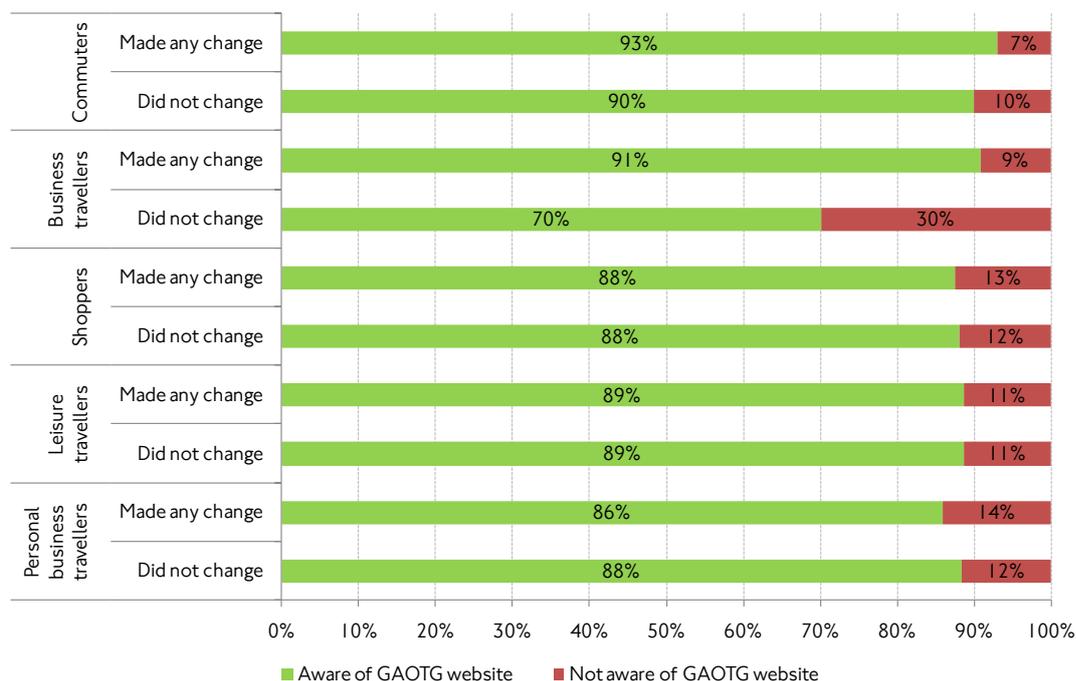
Figure 4.17 Awareness and planned use of Get Ahead of the Games tools prior to the Games by whether changed travel patterns during the Games.



Source: TfL Personal Travel Panel Survey
Base: 1,797 respondents (wave 1 and 2)

Figure 4.18 shows awareness of the Get Ahead of the Games website by whether London travellers planned to make changes for each journey purpose. Although there is no difference between changes made for shopping, leisure and personal business journeys, there is a significant difference between whether commuters and business travellers made a change by whether they were aware of the Get Ahead of the Games website. In particular, there is a striking difference between the travel patterns of business travellers depending on whether they were or weren't aware of the Get Ahead of the Games website prior to the Games, with just 70 per cent of those who weren't aware making to change, compared to 88 per cent of those who were.

Figure 4.18 Awareness of Get Ahead of the Games website prior to the Games by whether changed travel patterns during the Games, by journey purpose.

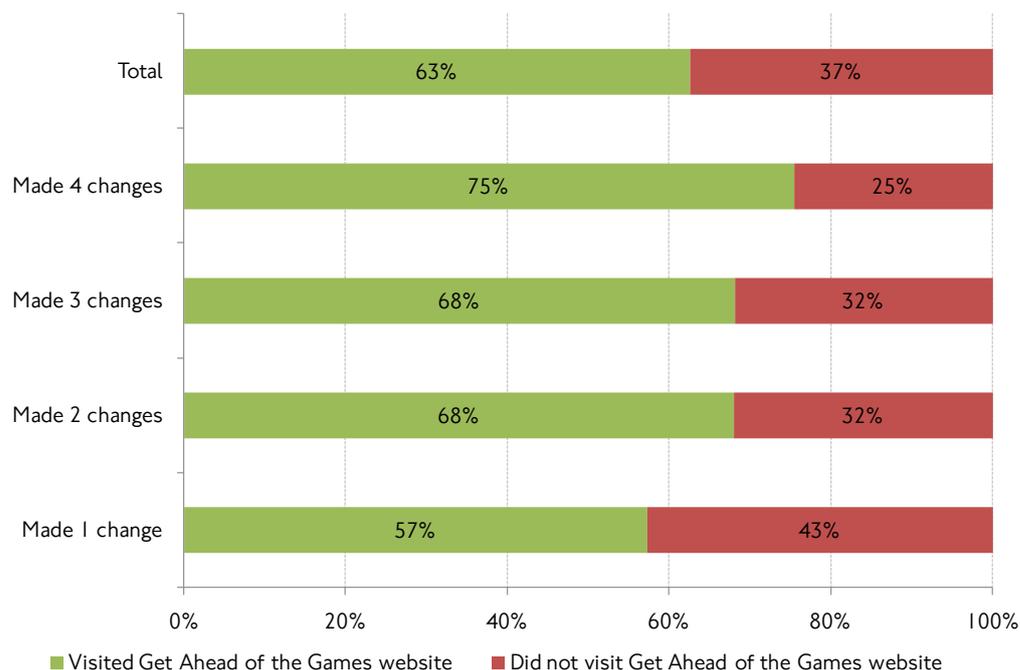


Source: TfL Personal Travel Panel Survey
 Base: 1,309 (commuters), 738 (business travellers), 1,438 (shoppers), 1,508 (leisure travellers), 1,072 (personal business travellers) (wave 1 and 2)

Use of tools by travel behaviour change

Six in ten London travellers reported that they had visited the Get Ahead of the Games website during the Games. Those who had visited the website were more likely to have changed their travel behaviour, 79 per cent compared to 54 per cent of those who had not visited the site. They had also made more changes on average than those who had not visited the site: 40 per cent had made more than one type of change to their travel behaviour, compared to just 18 per cent of those who had not visited the site. Figure 4.19 shows the amount of change made by whether the traveller had visited the Get Ahead of the Games website during the Games.

Figure 4.19 Number of types of change (Reduce, re-time, re-route or re-mode) made to travel behaviour, by whether had visited Get Ahead of the Games website during the Games.



Source: TfL Personal Travel Panel Survey
 Base: 1,797 respondents (wave 1 and 2)

Impact of network performance on planned and actual change

During the Games, three quarters of those travelling in London made some sort of change to their journey. It is clear that the effectiveness of the Get Ahead of the Games campaign was strongly influenced by the extraordinarily high profile of the event, and by the believability of the message: when told that they faced crowding and delays, and should plan accordingly, London travellers found this believable. This section explores the theory that those who thought the network would perform badly would be more likely to change than those who thought it would be OK to travel as normal.

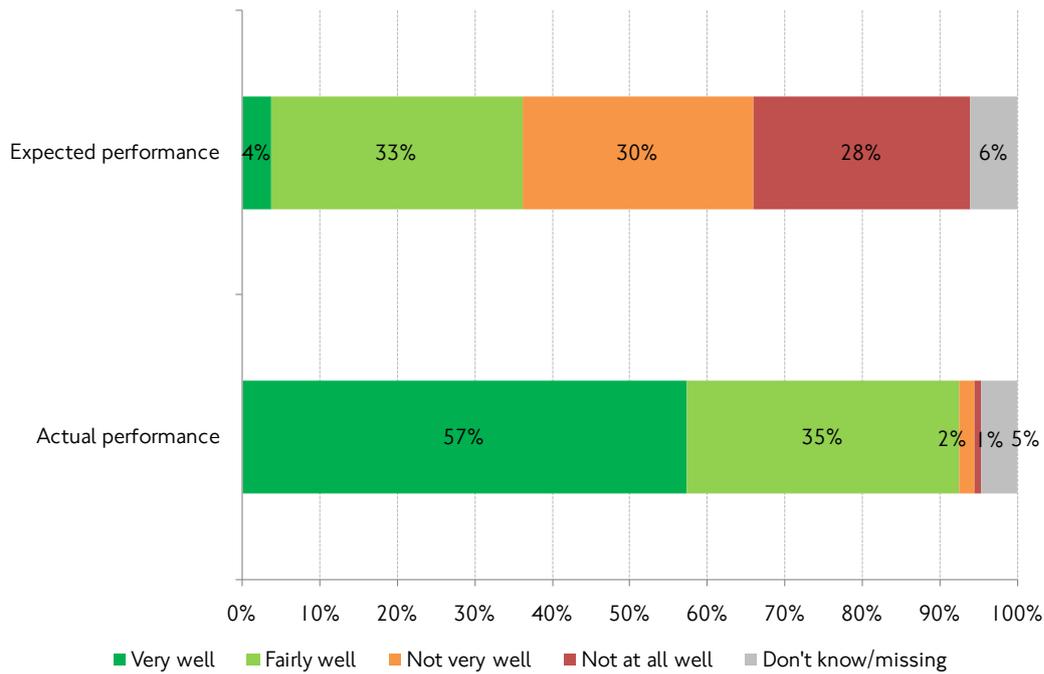
Expected performance of the transport network and the impact on planned change

Before the Games, London travellers were pessimistic about the likely performance of the transport system, with just 4 per cent expecting it to cope very well and the majority expecting it to cope badly.

In the event, the performance of the transport network defied expectations, with 93 per cent of London travellers saying the network had performed very or fairly well. The comparison is shown in Figure 4.20.

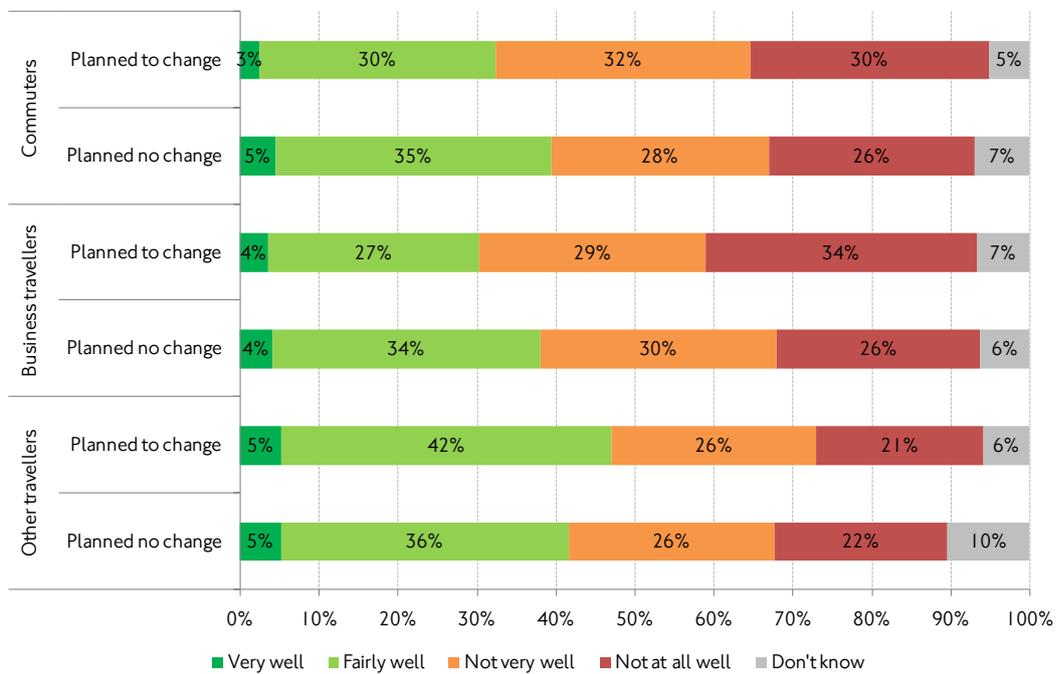
This is, of course, a fantastic endorsement of the efforts made to ensure the network ran smoothly. However, what particularly interests us here is whether expectations of network performance or attitudes towards actual performance had any influence on planned or actual change. As shown in Figure 4.21, the evidence shows that commuters and business travellers who thought the transport networks would perform well during the Games were significantly less likely to plan to change their travel behaviour than those who thought the networks would not perform well.

Figure 4.20 Expected and Actual performance of the transport network.



Source: TfL Personal Travel Panel Survey
 Base: 1,799 respondents (wave 1 and 2)

Figure 4.21 Expected performance of the transport network and planned change.



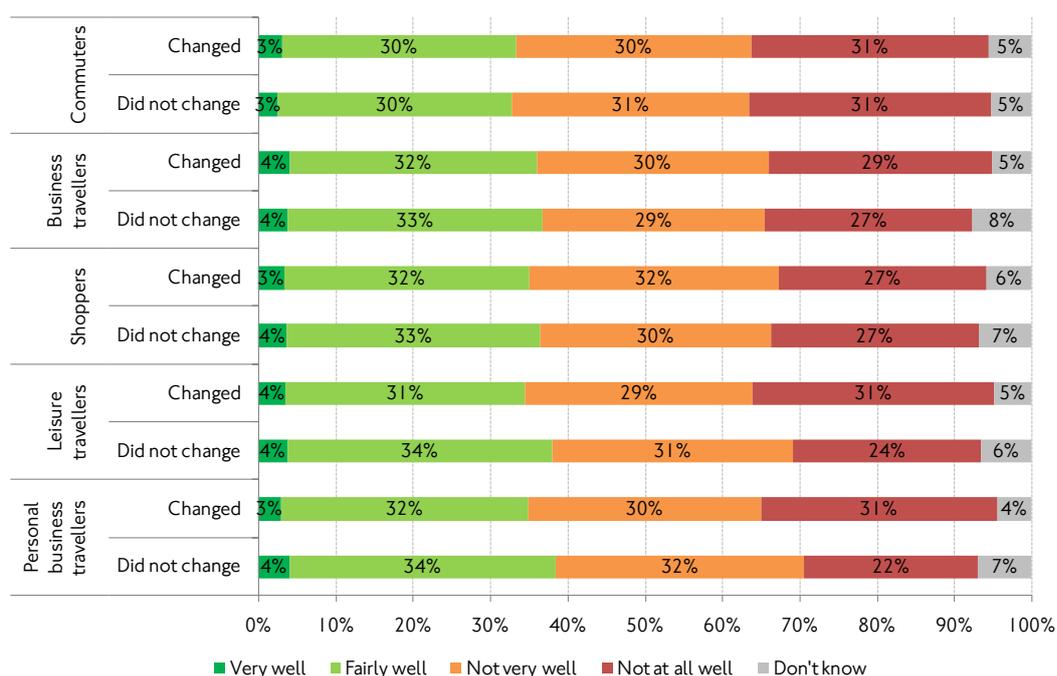
Source: TfL Personal Travel Panel Survey
 Base: 1,214 (commuters), 1,011 (business travellers), 285 (other purposes) respondents (wave 1)

Actual performance of the transport network and the impact on planned change

In comparison, there was very little difference in the actual amount of change made during the Games between those who thought the network would cope well and those who thought it would cope badly, as shown in Figure 4.22.

It is likely that perceptions of how the network actually performed, rather than expectations, would be more influential on choices made. Given the strong consensus amongst all groups that the network performed well, it is difficult to identify any pattern. However, it does appear that people who did not change their travel were a little more likely to think that the network had performed well than those who had chosen to make a change.

Figure 4.22 Expected performance of the transport network and actual change.



Source: TfL Personal Travel Panel Survey

Base: 1,214 (commuters), 1,011 (business travellers), 285 (other purposes) respondents (wave 1 and 2)

Conclusion – Understanding change

How demographic characteristics affect choices

Individual's characteristics in terms of demographics and geography had very little impact on the choice to change travel behaviour during the Games. There is some evidence of differences related to household income and the size and industry of the individual's workplace. Larger businesses and those in the financial and business services sector were the most engaged, especially those in the City and Canary Wharf.

How experience of and attitudes to change affected choices

In summary, London commuters with greater experience of varying their travel on a day-to-day basis, and who were more amenable to change, were more likely to plan to make changes to their travel during the Games, and (to a lesser extent) more likely to actually change their travel. Those who thought that change would be difficult, who never vary their journey, or who are not considering making any changes to their journey, were less likely to plan to

change. Nevertheless, in all groups, the majority of commuters made some sort of change to their journey during the Games, and during the Games the difference between the groups narrowed.

After the Games, the majority of commuters did not sustain the changes they had made, but commuters who typically varied their commute journey or who were considering changing their travel before the Games were significantly more likely to make a long term change to their commute journey.

In future, a good starting point for planning behaviour change programmes would be to explore the experience of variability in travel patterns of the target population, their attitudes to change and where they would position themselves on the theoretical model of behaviour change, as this evidence suggests this can predict their responsiveness to TDM activity in response to temporary disruption and in the longer term.

Impacts of Get Ahead of the Games tools on travel behaviour change

Unusually for a transport intervention, awareness of the surrounding circumstances was near universal. By July 2012, nearly nine in ten London travellers were aware of the Get Ahead of the Games website and nearly seven in ten had already visited it. London travellers who were aware of the tools, had already used them or were planning to do so when surveyed before the Games, and who reported using the tools during the Games, were more likely to plan to change their behaviour and more likely to actually make changes during the Games. They also changed more than those who were less engaged with the campaign. The awareness of, and engagement with, the campaign undoubtedly contributed to the preparedness of London travellers for the Games, and the level of change in travel behaviour seen throughout.

Impact of network performance on planned and actual change

London travellers appear to have approached the Games with some trepidation, expecting poor network performance, and it appears that those with lower expectations of network performance were more likely to plan to change their journeys during the Games.

In the event, the network performed far better than expected; the general consensus that the network performed well makes it hard to assess whether this relationship would have held in actuality: if attitudes had varied more, would we have been able to see a relationship between a negative view of network performance and a tendency to change travel patterns? The limited evidence that we have suggests that this might be the case, as those who thought the network had performed very well were less likely to change.

So, the plausibility of the message was important – the worse people believed conditions would be, the more likely they were to plan to change. London commuters especially are experts in their journeys and filtered the information provided through a ‘sense check’, ignoring anything they did not find plausible.

5. Why change?

The previous Chapter described the differences between those who changed, and those who did not change, in terms of their personal characteristics, their attitudes to change and prior experience of it, and the impact of the Travel Demand Management campaign. This Chapter explores the reasons why people chose to change, or not to change, explores the reasons why changes were sustained or not, and draws conclusions about what these motivations might mean for the success of future Travel Demand Management activity. In particular, it asks the question: might the motivations for change during the Games also apply in other circumstances, for example in the event of planned disruption to the network caused by upgrade works, or to help manage increased demand in future?

This Chapter draws on the TfL Personal Travel Panel Survey, waves one to three. The methodology of this survey is described in Chapter 2.

Key findings:

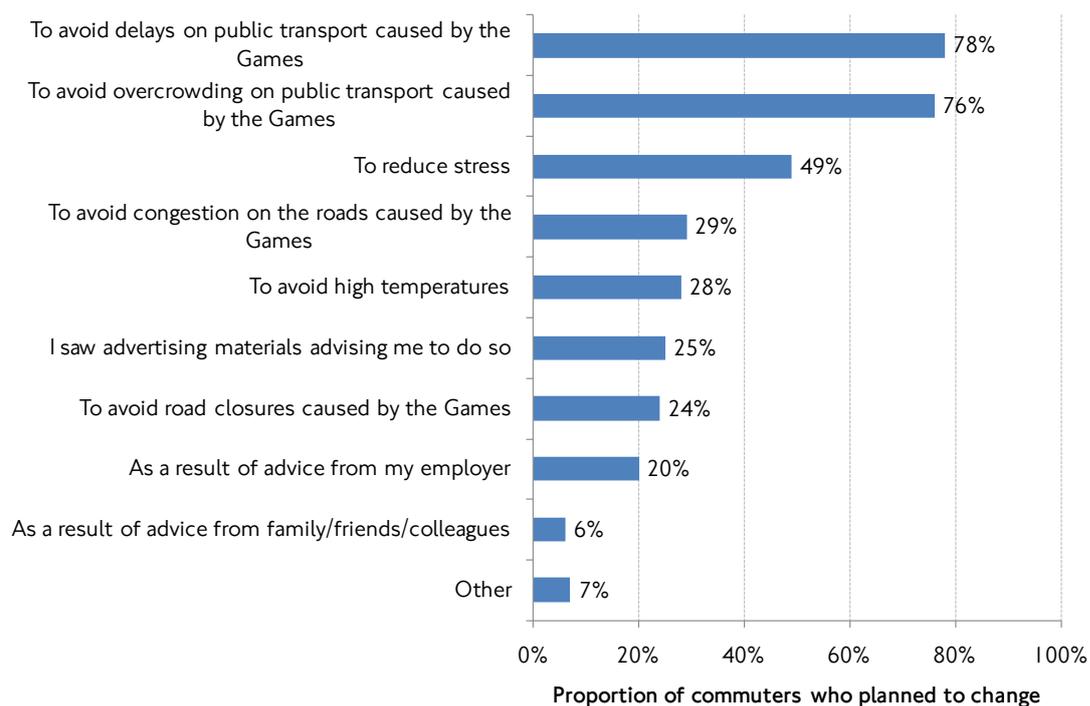
- The main reason London travellers changed their travel during the Games was to avoid overcrowding, congestion and delays caused by the Games.
- For workers and business travellers, decisions made by their employers or clients were also influential.
- Some changes resulted as people changed their normal activities by attending Games-related events or simply staying at home to catch up with the latest medals on television!
- The main reasons given for continuing to travel as normal were that journeys were unaffected by the Games; overcrowding, congestion and delays weren't as bad as expected; or that the person needed to travel and had no other options available.
- After the Games, most travel returned to normal. The reasons given for this were that there was no longer any need to change, and that the alternative option had been worse in some way – slower, more expensive, or more inconvenient.
- For many commuters and business travellers, the nature of their work did not enable them to sustain the change in the longer term, or their employer wouldn't allow it.
- A small minority had sustained the changes made during the Games, and this was typically because they had found the new option preferable to their previous option.

Understanding why London travellers changed their journeys

Why change? - Commuters

47 per cent of commuters planned to make a change to their journeys during the Games and 54 per cent actually did so. The key reasons for making a change were to avoid overcrowding and delays on public transport. This is in line with the Travel Demand Management messages: that the Games would bring high volumes of people onto London's transport network and that travellers should avoid busy times and places if possible. Figure 5.1 shows the reasons commuters gave for planning to change their journeys during the Games.

Figure 5.1 Reasons for planned changes to commute journeys during the Games.



Source: TfL Personal Travel Panel Survey
Base: 579 respondents (wave 1)

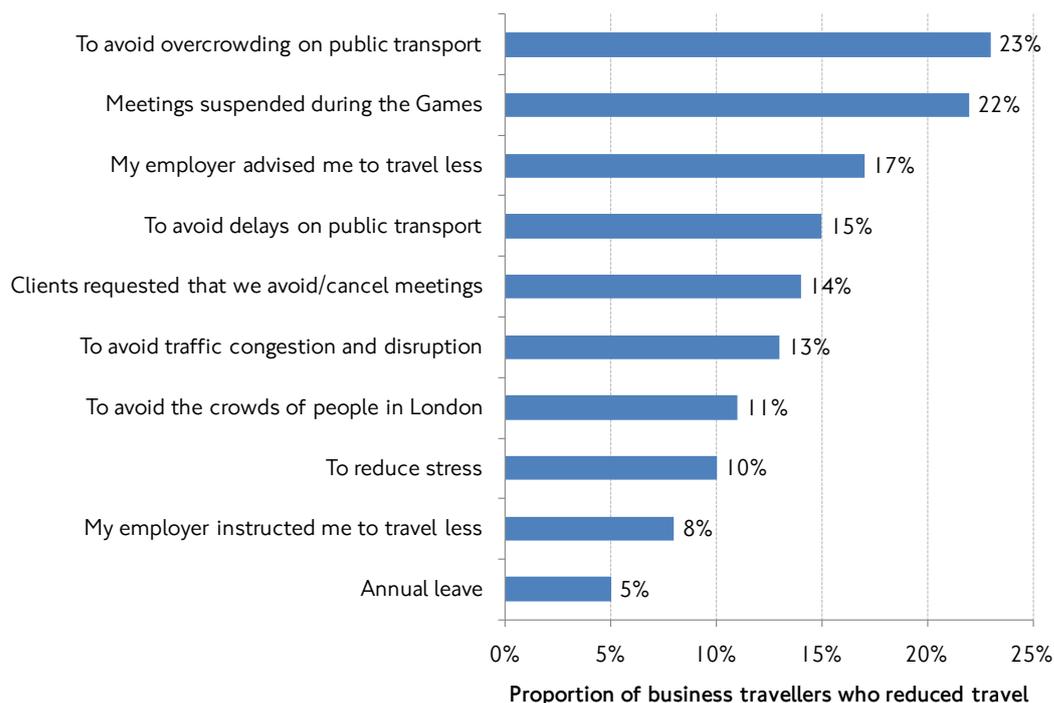
Commuters also commonly mentioned the desire to avoid the crowds of people in London and some said that they had made changes to the time of their travel to allow them to watch TV coverage or attend Games events, and the motivations for change were similar for all types of changes made. The impact of employers was important for those changing where they worked or the time of their journeys:

- Around a third of commuters who worked from home more during the Games said working from home was more acceptable during the Games and their employer had advised them to travel less;
- Around a sixth of commuters who re-timed their journeys said that their employer had advised them to arrive at or leave work at a different time; and
- One in ten commuters who worked elsewhere had been advised to do so by their employer.

Why change? – Business travellers

73 per cent of business travellers planned to make a change to their journeys during the Games and 35 per cent actually did so. The reasons for changing the time, route or mode of business journeys were very similar to those of commuters. However, although many business travellers reduced their travel to avoid overcrowding on the public transport network, the attitudes of employers and clients were also a key influence, with 27 per cent reducing their business journeys in response to advice from their employer or clients. Figure 5.2 details the reasons business travellers reduced their journeys during the Games.

Figure 5.2 Reasons for reducing business journeys during the Games.

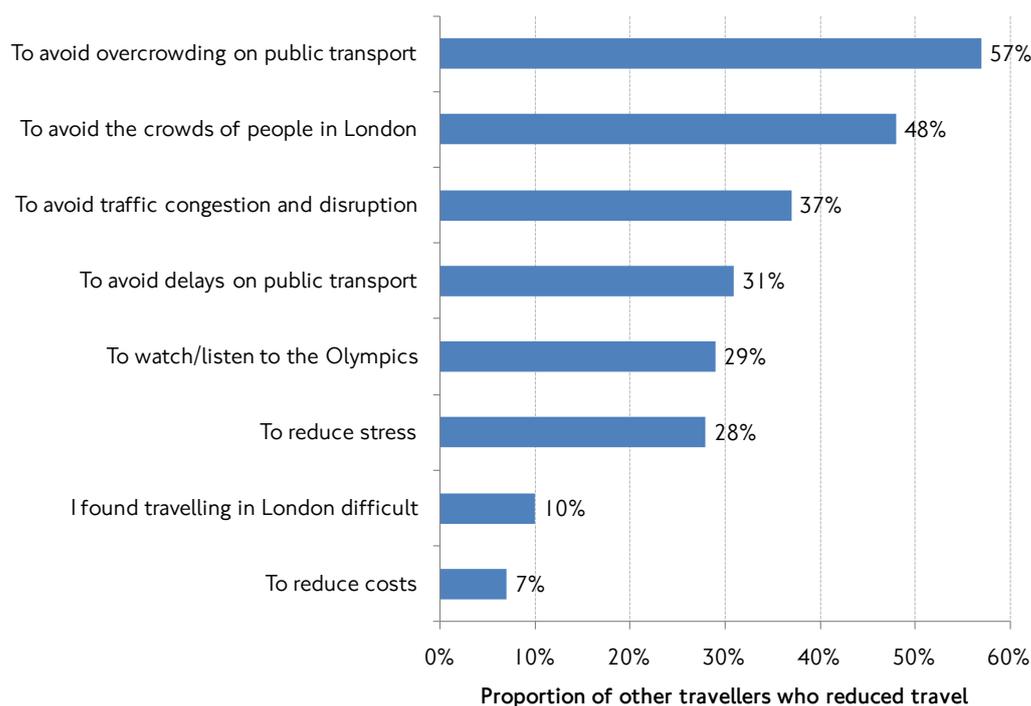


Source: TfL Personal Travel Panel Survey
Base: 474 respondents (wave 2)
Note: all responses given by more than 5% of respondents listed.

Why change? – shopping and leisure travellers

77 per cent of those travelling for shopping, leisure and other reasons planned to make a change to their journeys during the Games and between four and five in ten actually did so. The main reasons for making a change were to avoid overcrowding on public transport and avoid the crowds of people in London, but around one in three also said that they had changed their travel patterns in order to watch or listen to the Games. This reflects the discretionary nature of journeys for shopping, leisure and other purposes, and also that the Games inevitably changed many people's leisure activities as they watched the sport on TV, attended free or ticketed events, or just soaked up the atmosphere in their Olympic city. Figure 5.3 shows the reasons given for reducing journeys made for shopping, leisure and other purposes during the Games.

Figure 5.3 Reasons for reducing non-work journeys during the Games.



Source: TfL Personal Travel Panel Survey
Base: 337 respondents (wave 2)
Note: all responses given by more than 5% of respondents listed.

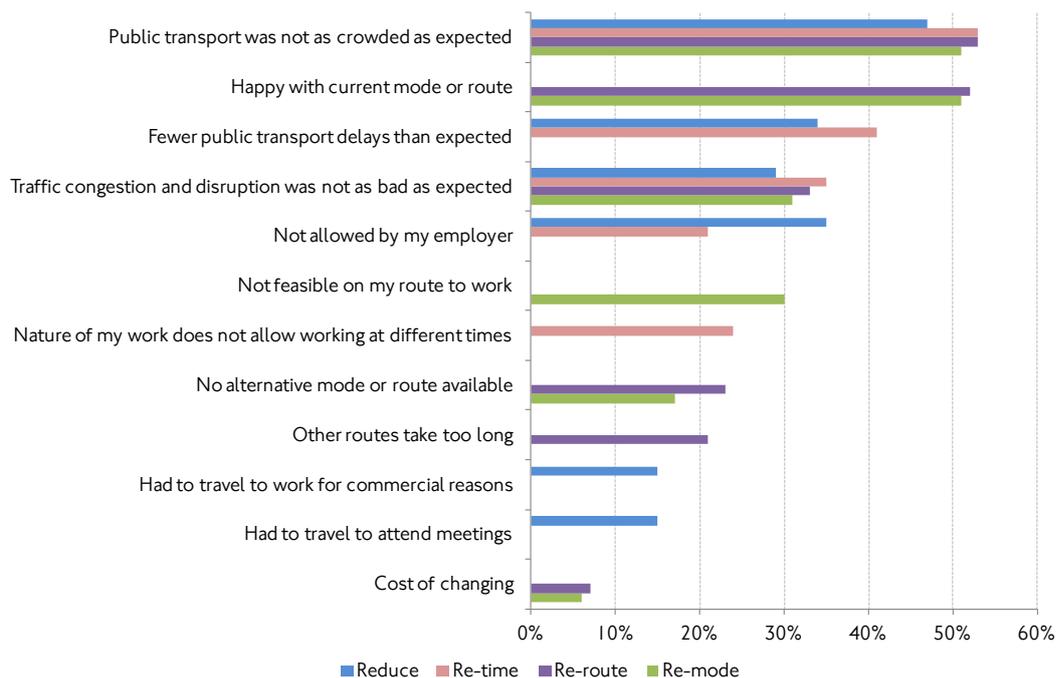
Understanding why London travellers did not change their journeys

Why not change? – commuters

The main reason that commuters gave for travelling in the same way as normal during the Games was that the Games did not have as great an effect as they had expected on public transport crowding, delays and traffic congestion. Half of those who did not change their mode or route said that this was because they were happy with their current choice. For many, there was no feasible alternative to the route, mode or time of travel, and they could not reduce their travel to work for commercial reasons, because they needed to attend meetings, or because their employer would not allow them to. The reasons for not choosing to make a change are shown in Figure 5.4. Note that any gaps reflect differences in the questions asked in the survey.

Again, we can see the important role of employers in the choices made by commuters – although many felt that they did not need to reduce or re-time their work journeys, because conditions were not as bad as expected, a significant proportion were prevented from doing so by the nature of their work or decisions made by their employer. So, employers had a strong influence on both those who changed and those who didn't.

Figure 5.4 Reasons for not changing commute journeys during the Games.



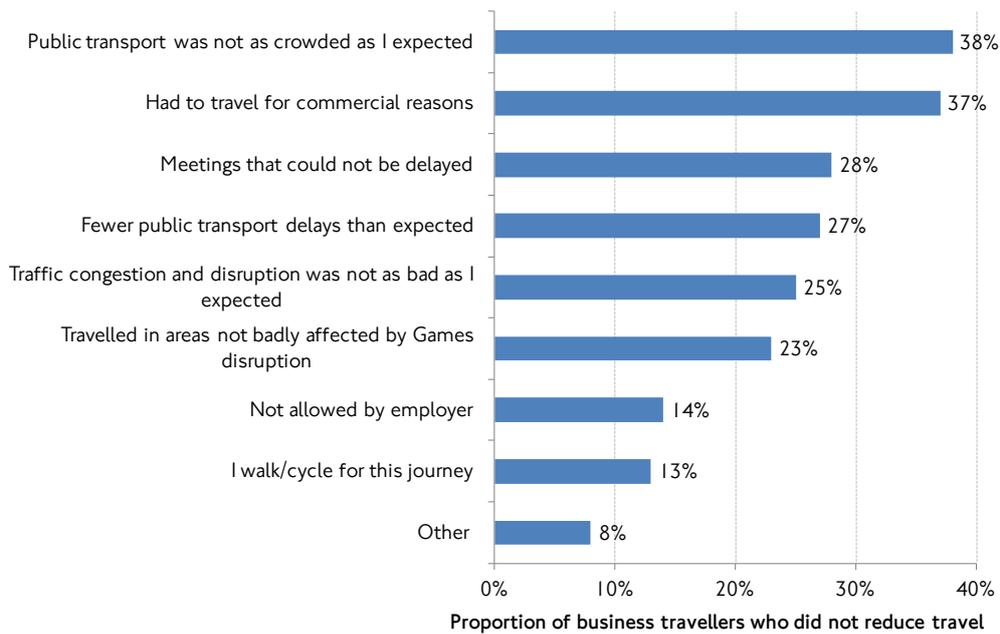
Source: TfL Personal Travel Panel Survey
 Base: 903 (Reduce), 887 (Re-time – return leg), 975 (Re-mode), 921 (Re-route) (all wave 2, commuters only)
 Note: Only includes responses given by more than 5% of respondents; not all questions were asked of all respondents.

Why not change? – business travellers

As with commuters, many business travellers travelled as normal because they did not find conditions on the public transport and road networks to be as bad as they had expected; in total, around half all those who travelled as normal gave this reason. Around a quarter said that their journey simply wasn't affected by the Games, because they were travelling elsewhere in London.

Business need was the other key reason for travelling as normal; for example, because the trip would be commercially beneficial, could not be delayed, or their employer would not let them cancel. In total, 65 per cent of those who travelled as normal said that this was because they could not change the journey for business reasons. Figure 5.5 shows the reasons given by business travellers for travelling as normal during the Games.

Figure 5.5 Reasons for not reducing the amount of business travel during the Games.

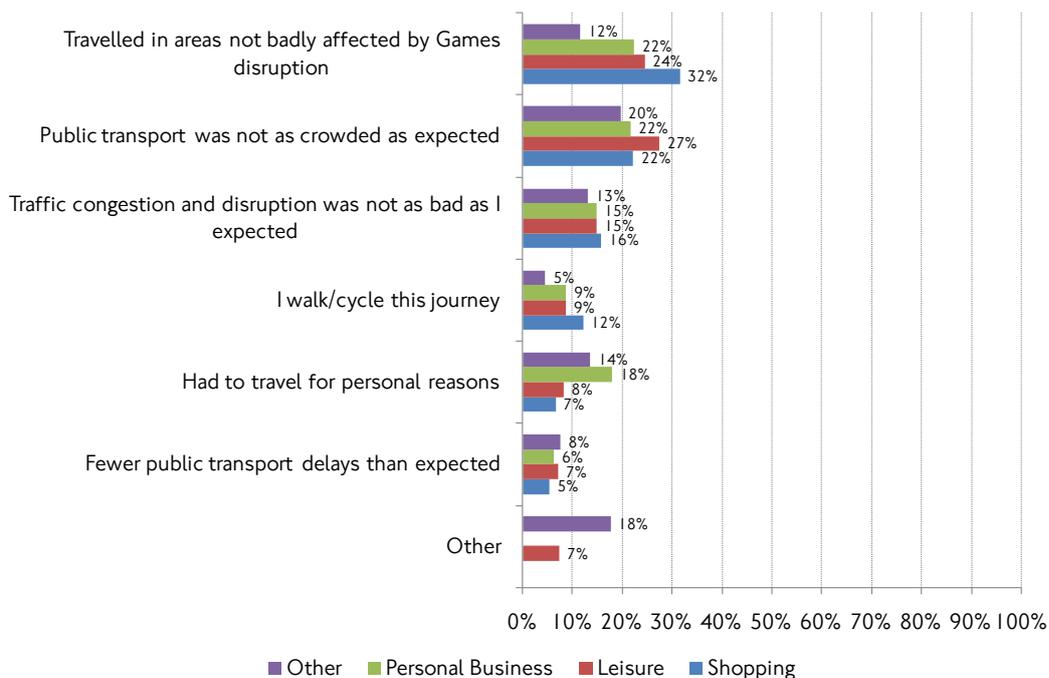


Source: TfL Personal Travel Panel Survey
Base: 417 respondents (wave 2)

Why not change? – shopping and leisure travellers

The main reasons for not reducing non-work journeys were that the journeys were being made in parts of London where travel was not badly affected by the Games or that crowding and congestion on the public transport and road network were not as bad as expected.

Figure 5.6 Reasons for not reducing the amount of shopping and leisure travel during the Games.



Source: TfL Personal Travel Panel Survey
Base: 767(shopping), 952 (leisure), 541 (personal business) and 199 (other) (wave 2 only)

Understanding why London travellers sustained a change to their journeys

Why return to normal? – Commuters

Relatively few of the many commuters who changed their travel during the Games sustained the change after the Games, with most reverting to their normal travel patterns as soon as the Games were over. Typically, commuters gave the following reasons for reverting to their normal travel patterns:

- 1. There was no longer any need to change, because travelling was easier and congestion, crowding and delays were less than during the Games:**
 - 43 of those who worked from home in the Games but not afterwards (25 per cent) and 27 of those who were working from home the same amount or less than before the Games (9 per cent);
 - 8 of those who worked elsewhere in the Games but not afterwards (7 per cent) and 15 of those who were worked elsewhere the same amount or less than before the Games (7 per cent);
 - 60 of those who re-timed their outbound leg (52 per cent) and 37 of those who re-timed their homebound leg (32 per cent) but did not sustain the change;
 - 13 of those who changed their mode of travel but reverted to their previous mode after the Games (62 per cent); and
 - 32 of those who changed the route of their journey but reverted to their normal route after the Games (50 per cent).
- 2. Amongst those who had changed the time, mode or route of their journey, that they didn't like the experience and found it to be worse than their normal journey in some way:**
 - 21 of those who re-timed their outbound leg (18 per cent) and 10 of those who re-timed their homebound leg (9 per cent) but did not sustain the change;
 - 13 of those who changed their mode of travel but reverted to their previous mode after the Games (62 per cent); and
 - 27 of those who changed the route of their journey but reverted to their normal route after the Games (42 per cent) said that the route was more inconvenient or stressful and 14 (22 per cent) that it was slower or more expensive.
- 3. Amongst those who had changed the time of their journey or worked from home or elsewhere more, that the nature of their work had only made this change possible during the Games, or they needed the interaction with colleagues or to attend meetings:**
 - 100 of those who had worked from home during the Games but not afterwards (58 per cent) and 214 of those who had not increased the amount they worked from home compared to before the Games (69 per cent);
 - 59 of those who had worked elsewhere during the Games but not afterwards (49 per cent) and 161 of those who had not increased the amount they worked elsewhere compared to before the Games (71 per cent); and

- 8 of those who re-timed their outbound leg (7 per cent) and 11 of those who re-timed their homebound leg (9 per cent).
4. **Amongst those who had changed the time of their journey or worked from home more, that their employer had only allowed them to make this change during the Games, or it was not acceptable amongst their colleagues:**
- 32 of those who had worked from home during the Games but not afterwards (19 per cent) and 43 of those who had not increased the amount they worked from home compared to before the Games (14 per cent);
 - 15 of those who re-timed their outbound leg (13 per cent) and 19 of those who re-timed their homebound leg (16 per cent).

Why sustain change? – Commuters

The majority of commuters who changed in the Games went back to normal after the Games, but 6 per cent did sustain a change. Most of those who did choose to change their travel permanently did so because they found the new time, route or mode to be better than their previous choice, because it was less stressful and allowed them to avoid overcrowding or congestion, or because it was quicker or cheaper, or simply more enjoyable:

- 16 of those who were working from home more said that they had found it more enjoyable or productive than expected and 15 said that they were avoiding congestion, overcrowding or the stress of travel;
- 18 of those who re-timed the outbound leg of their journey said that they had enjoyed it or it was better and 17 that the new time allowed them to avoid congestion, overcrowding or the stress of travel;
- Similarly, 9 of those who re-timed their homebound journey said that they had enjoyed it or it was better and 15 that the new time allowed them to avoid congestion, overcrowding or the stress of travel;
- 13 of those who continued to use a new route said that they were avoiding congestion, overcrowding or the stress of travel and 10 said that the new route saved them time or money; and
- 10 travellers who continued to use a new mode said that they had enjoyed the experience during the Games, 9 that it improved their health and 9 that it was less stressful.

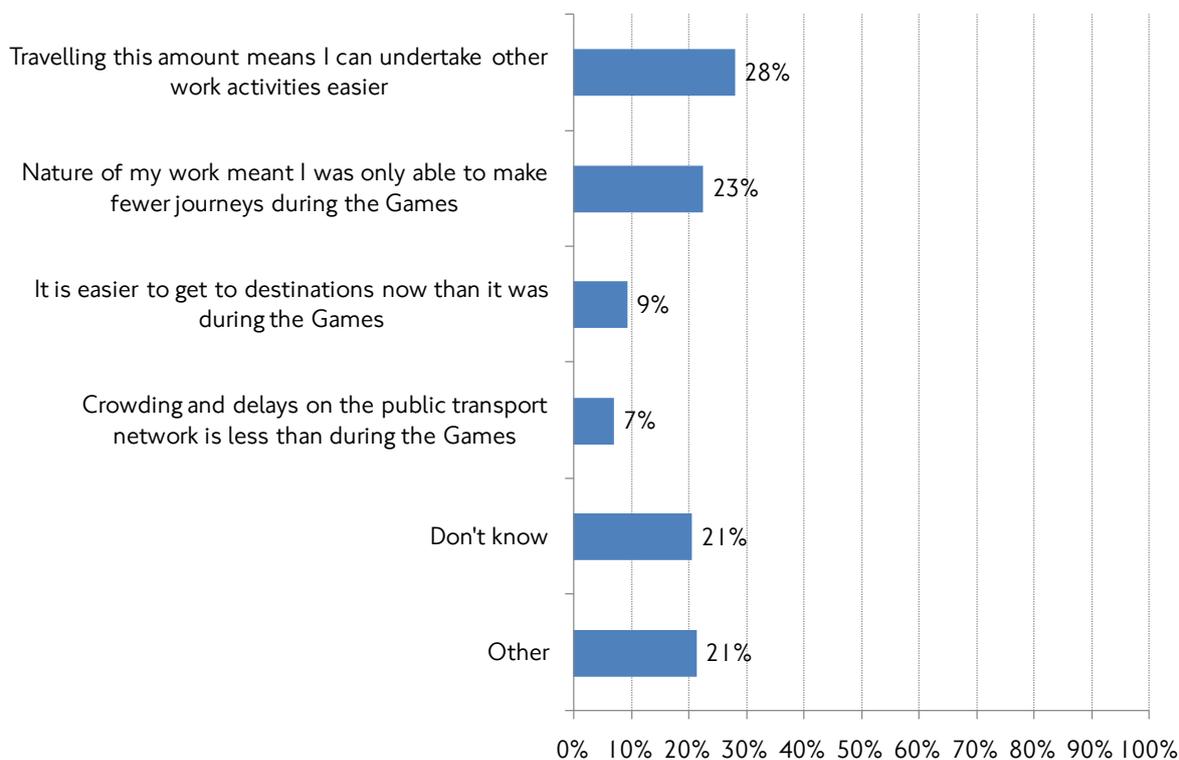
A few respondents said that they had made changes because their employer now encouraged or allowed it: 6 of those who were working from home more, 2 who were working elsewhere more and 2 who had re-timed their journey.

Why sustain change or return to normal? – Business travellers

After the Games, a small proportion of business travellers stopped travelling for business or reduced the amount that they travel (3 per cent of business travellers). The most common explanations given by this group were that their employer had made changes enabling them to travel less (7 respondents), that they had tried out the experience in the Games and continued to do so (6 respondents) or that they were using telephone conferencing more (6 respondents). The use of technology to replace travel to business meetings (telephone conferencing, video conferencing or instant messaging) was mainly because it saved time for the individual and money for the individual and/or business.

Most business travellers had returned to their previous patterns of travel after the Games. The main reasons for this were that travelling this amount means they could undertake other work activities more easily (28 per cent) or that the nature of their work meant they were only able to reduce their travel during the Games and not permanently (23 per cent). All reasons given by more than 5 per cent of respondents are shown in Figure 5.7.

Figure 5.7 Reasons for not sustaining a reduction in business travel after the Games.



Source: TfL Personal Travel Panel Survey

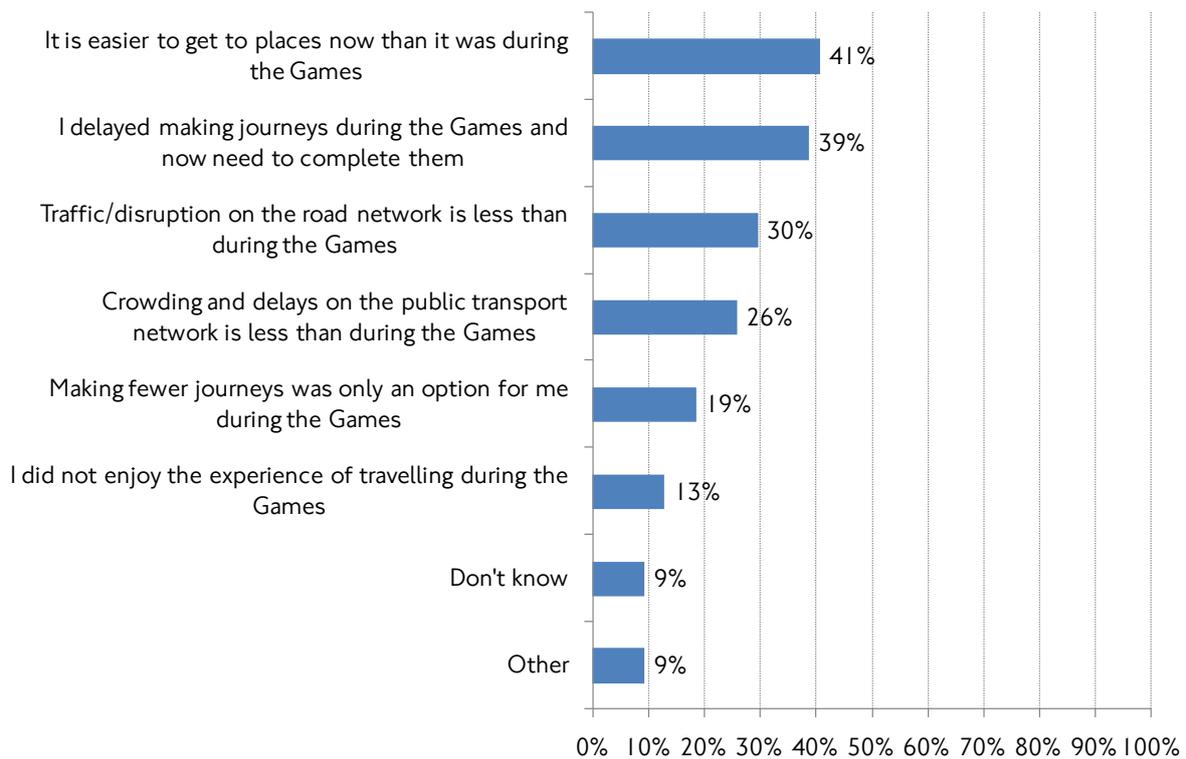
Base: 256 respondents who made a change in to their business journeys wave 2 but did not sustain this change in wave 3

Why sustain change or return to normal? – Other travellers

7 per cent of non-work travellers sustained a change to their non-work journeys after the Games. Generally, travellers that continued with the changes during the Games did so because they found the change made their journey better in some way. 72 per cent of the 32 respondents who sustained a change to the time of their non-work journeys did so because it was more convenient and 47 per cent did because they found they could save time. 23 respondents sustained a change to their mode of travel, 52 per cent of those did so to avoid crowding on the public transport network and 43 per cent did so because they enjoyed the experience during the Games. 22 respondents sustained a change to the route of their non-work purpose journeys, of those 36 per cent did so because they found it saved them time and 32 per cent did so because they found it saved them money. [Note: Respondents could give more than one response to these questions.]

The most popular change made to non-work travel during the Games was to reduce the number of journeys made; two per cent of non-work travellers have sustained a reduction in non-work travel since the Games. Of those who did not sustain the change, 41 per cent didn't because it is easier to get to places now and 39 per cent didn't because they had postponed their journeys during the Games and are now undertaking them.

Figure 5.8 Reasons for not sustaining a reduction in non-work travel after the Games.



Source: TfL Personal Travel Panel Survey

Base: 54 respondents who reduced their non-work journeys in wave 2 but did not sustain this change in wave 3

Conclusion – Why change?

It is clear that the change was largely in response to the temporary conditions created by the Games: a more challenging travel environment, an acceptance that normal working patterns would need to be relaxed somewhat, and the Games taking over from normal leisure activities. There is no significant evidence that the Games prompted people to make changes they were considering anyway.

Where London travellers did not change, this was largely because they did not consider the conditions to be bad enough to warrant a change, or they needed to travel and did not have any other reasonable options available to them. The impact of the Games was concentrated in some locations, particularly in central and east London and around the other Games venues. So, for some, their journey will have been largely unaffected by the Games. Others may simply have been happy to travel in the prevailing conditions or found it necessary to do so.

Again, this suggests that whilst it is possible to encourage people to change their travel patterns when conditions on the network are expected to be significantly worse than usual, travellers will typically stick to their normal habits unless they expect to be negatively affected. And for some, the circumstances of their work or the limited options available to them mean that change is not an option, or is very difficult.

For most of those who had reverted to their previous travel patterns, this simply reflected the fact that the conditions that had precipitated the change no longer applied. For some,

their employer had encouraged or allowed temporary changes to work responsibilities or working patterns that facilitated change for the short period of the Games only, and their normal working conditions did not allow them to sustain the change. Finally, some had found the alternative journey to be worse than their usual option, and were therefore only prepared to make the change in the short term.

The reasons London travellers changed their travel were short term and specifically related to the Games. For most, they had intended to change only for the duration of the Games and, once the Games were over, there was simply no reason to stick with the change they had made. A few sustained the changes made, largely because in the process of changing they discovered a better option; this was especially the case for those making more irregular journeys, such as for shopping or leisure. However, it is clear that most of those making regular journeys are aware of the options available to them and have already chosen the best option for their journey, in terms of their own priorities. Whilst the London travelling population demonstrated that they are willing and able to change in the face of short term disruption, for most this has not translated into longer-term change.

6. Focus on public transport hotspots

In the run up to the Games, a number of stations were identified as hotspots: stations that would be exceptionally busy during the Games. They were stations which are heavily used by commuters and also would see significant Games related use (for example, rail termini and stations close to the Games venues). The hotspot stations were Paddington, Marylebone, Euston, Kings Cross, St Pancras, Liverpool Street, Waterloo, London Bridge, Victoria, Charing Cross, Bank, Canary Wharf, Oxford Circus, Leicester Square, Piccadilly Circus, Bond Street, Blackfriars, Fenchurch Street and Cannon Street. The hotspot stations were grouped into four categories:

- Terminus group: Paddington, Marylebone, Euston, King's Cross, St Pancras, Liverpool Street, Waterloo, London Bridge, Victoria and Charing Cross;
- City/Canary Wharf group: Bank, Canary Wharf;
- West End: Oxford Circus, Leicester Square, Piccadilly Circus, Bond Street; and
- Others: Blackfriars, Fenchurch Street, Cannon Street.

This chapter focuses on the experience of regular users of hotspot stations during the Games to understand how passengers decided whether to change their travel behaviour and what they did during the Games, as well as whether any of the changes made have been sustained since the Games.

This Chapter draws on the TfL Oyster and Hotspot User Survey and Focus Groups. The methodology of these surveys is described in Chapter 2.

Key findings:

- Nine in ten hotspot station users expected their station to be busier than normal and as a result nearly all had thought about how they would travel during the Games, although many decided to wait and see what happened before committing to a change (41 per cent).
- Six in ten had received emails informing them about likely travel conditions at their station, and four in ten had heard announcements at the station or seen posters. A quarter had received a walking map.
- The most useful information sources were texts and emails – nine in ten of recipients found these useful - and in general all communication channels were well received.
- Focus group respondents said that they preferred messages that were more specific to their journey rather than generic sources of information such as posters, and were even happy for data gathered from their Oyster card to be utilised to tailor messages to their needs.
- Regular travellers used their knowledge of London and its transport system to ‘sense check’ the advice they were given so that, for example, the ‘unusual’ routes suggested by the Games Journey Planner (aimed at visitors) were typically ignored.
- 43 per cent of travellers through public transport hotspots changed their journeys during the Games, of which 26 per cent re-timed, 14 per cent reduced their travel by working from home or a different location, 8 per cent re-routed or changed the mode of their journey. Around 16 per cent of hotspot station users sustained the change after the end of the Games.
- The Canary Wharf Group was extremely proactive in encouraging local businesses to plan for the Games and employees working in Canary Wharf were more likely to have received information from their employer about how to plan their travel and more likely to have made a change, and in particular to have re-timed or reduced their journeys, both changes reliant on employer support.

Planning for the Games

This section explores regular hotspot users’ expectations of travel during the Games and whether and how they planned their travel during the Games.

Expectations of travel during the Games

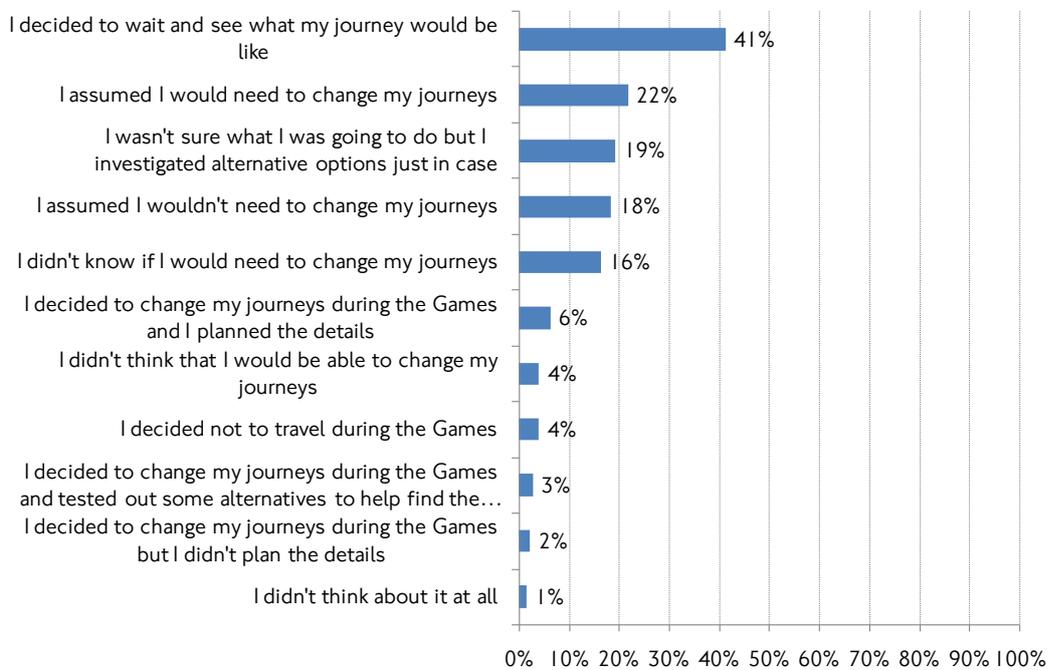
The majority (92 per cent) of regular hotspot users expected their hotspot stations to be busier during the Games, with only 8 per cent expecting their station to be as busy, or less busy, than normal.

Almost nine in ten regular hotspot users stated that they had received information about travel at their hotspot (either through email, text, station announcements, posters or a walking map). Those that had received the information were more likely to expect their hotspot station to be particularly busy during the Games (48 per cent of those who had received hotspot information compared to 25 per cent of those who had not).

Planning for travel during the Games

Almost all regular hotspot users (99 per cent) considered in advance how they would make their journey to and from work during the Games. The most popular approach to planning travel was to 'wait and see' (41 per cent). 11 per cent of regular hotspot users had decided to change their Games-time journey and planned or tested alternatives.

Figure 6.1 Regular hotspot users' approach to planning travel during the Games.



Note: Respondents can give more than one reason so total is more than 100 per cent

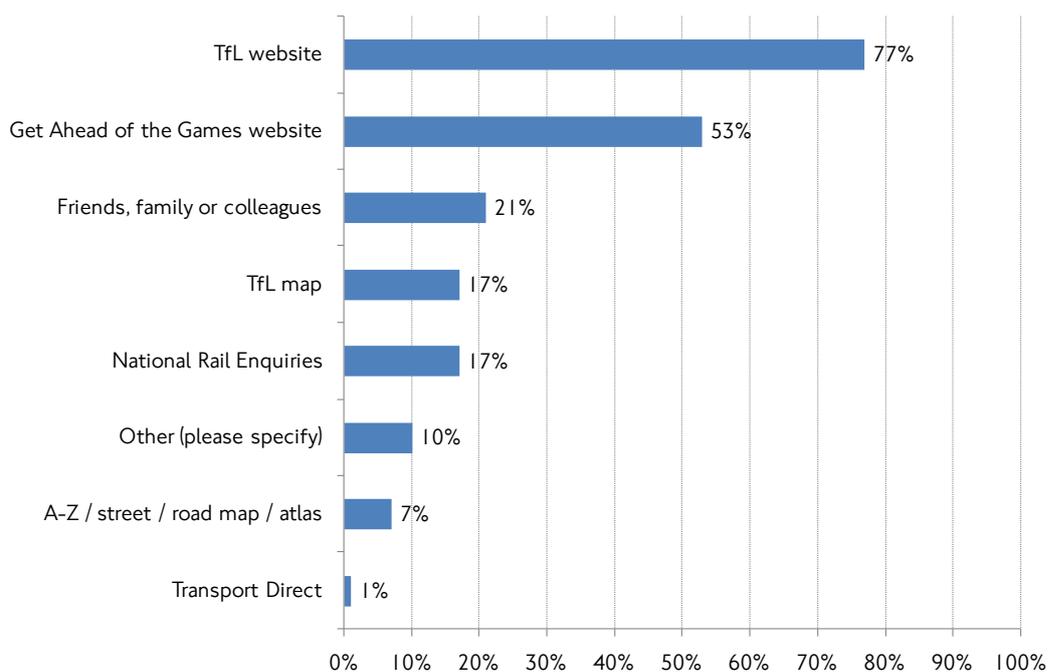
Source: TfL Oyster and Hotspot User Survey 2012

Base: 2,709 all respondents

Information used to plan travel during the Games

Over three quarters of regular hotspot users who had planned how they would make changes to their journey in advance of the Games used the TfL website and over half had used the Get Ahead of the Games website. Advice from friends, family and colleagues was also important in helping regular hotspot users to plan their Games time travel, with two in ten taking advice.

Figure 6.2 Information sources used by regular hotspot users who planned their travel during the Games.



Note: Respondents can give more than one reason so total is more than 100 per cent

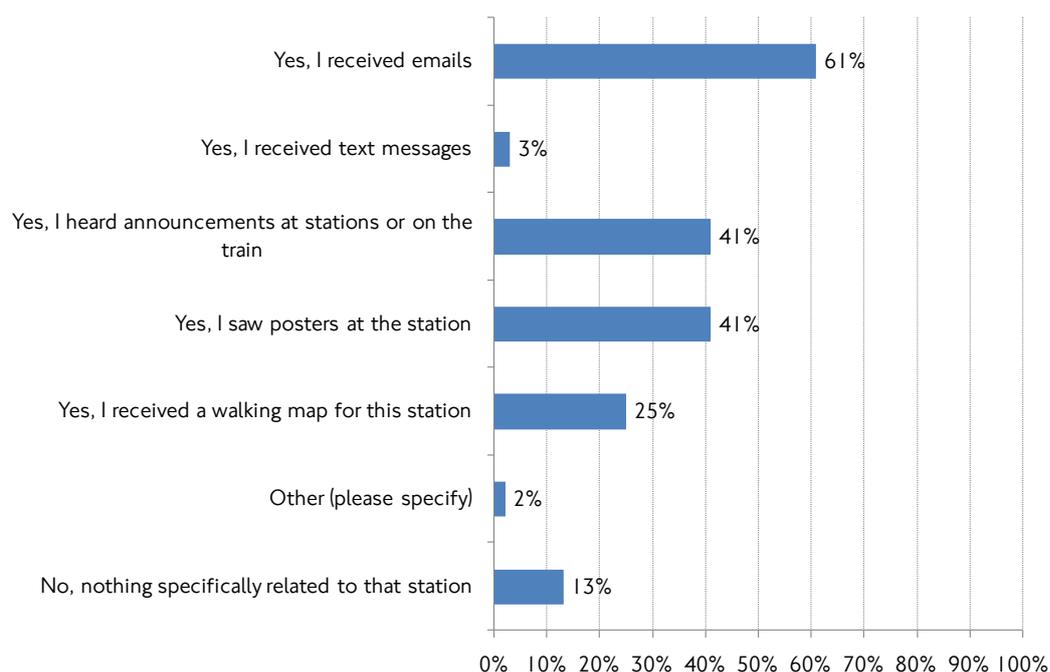
Source: TfL Oyster and Hotspot User Survey 2012

Base: 229 all respondents who made a decision to change their Games time journey and planned details/tested alternatives

The Olympic and Paralympic Games Travel Demand Management programme provided targeted information about the impact of the Games on public transport hotspot stations including grids showing the busiest times, announcements and posters at stations and emails. Nine in ten regular hotspot users received some form of information about travel at their station before or during the Games.

The majority received emails about travel to their hotspot station, and two fifths heard announcements at stations or on the train, and saw posters at the station. A quarter received a walking map for their hotspot station.

Figure 6.3 Information sources about travel at hotspot stations.

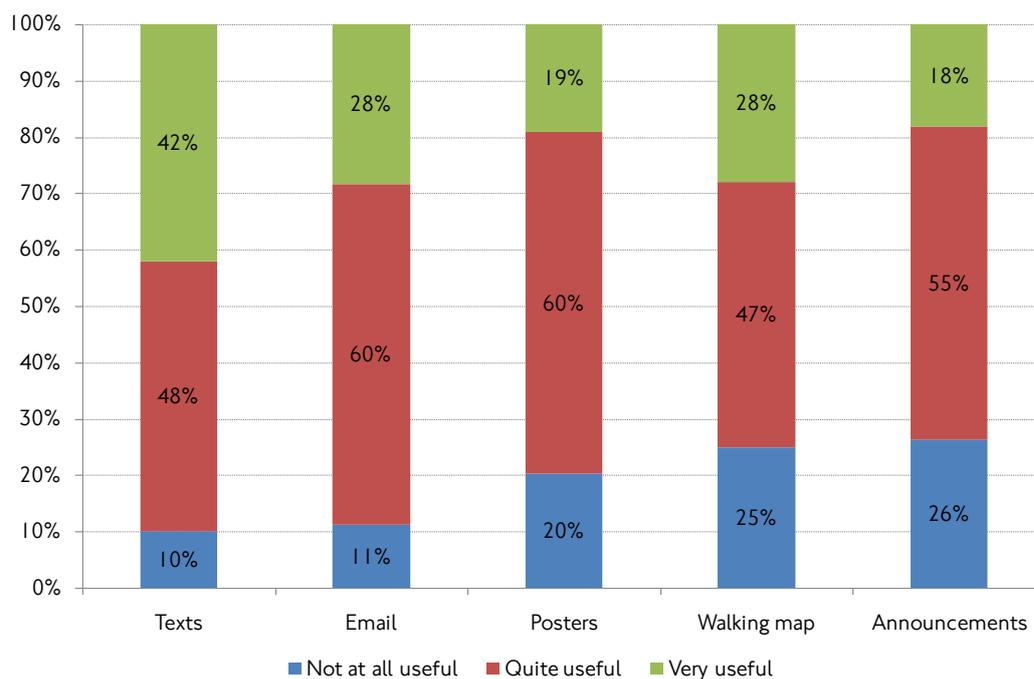


Note: Respondents can give more than one reason so total is more than 100 per cent
Source: TfL Oyster and Hotspot User Survey 2012
Base: 2,709

The most useful information sources were text messages and emails, with 90 per cent of those who received texts stating that they were useful (either “quite” or “very”) and 89 per cent of those who received emails stating they were useful. Station announcements and walking maps were also well received, with 74 per cent of regular hotspot users stating that station announcements were useful, and 75 per cent stating that walking maps were useful.

Regular hotspot users seem to prefer more specific messaging related to their particular journeys which is easier to achieve with direct messaging (e.g. emails and text messages) compared to station announcements and posters. During the focus groups, regular hotspot users stated that emails are one of the best ways to contact commuters and if they could be more tailored with specific information relevant to the individual’s normal journey the regular hotspots users said they would be more likely to read and use the information. Regular hotspot users seemed to be happy for data gathered from their individual Oystercard usage to be utilised to tailor the messages to their needs.

Figure 6.4 Usefulness of information received about hotspot stations.



Source: TfL Oyster and Hotspot User Survey 2012
 Base: 1,642 all respondents who received information about their hotspot station

Regular hotspot users used their knowledge of London and its transport system to ‘sense check’ the information they received from TfL and the ODA. There was some awareness that TfL’s Journey Planner was suggesting ‘unusual’ routes and these suggestions were generally ignored by regular hotspot users, though this was not considered irritating and was thought to be about taking non-Londoners via different routes to spread travel demand.

Employers’ influence on the travel of hotspot station users during the Games

Over two thirds of regular hotspot users received information and advice to help them plan their travel during the Games by their employer. Regular hotspot users whose station was within the City/Canary Wharf station category (i.e. Bank or Canary Wharf) were more likely to have received information and advice from their employer to help them plan their travel during the Games, with three quarters stating that their employer provided them with information. TfL and Canary Wharf Group undertook substantial engagement with businesses in the Canary Wharf area to ensure that measures were taken to enable them to operate as normal during the Games.

Regular hotspot users using stations in the West End or Terminus category were slightly less likely to have had information provided by their employer, with 64 per cent and 67 per cent respectively stating that they had received information.

Most regular hotspot users who received information from their employer received links to information sources (for example, the Get Ahead of the Games website), specific information about Games-time hotspots, notification that they would be able to chose to work from home or arrive earlier or later, or a combination of these. Some regular hotspot users reported that they had received very detailed information and that their employer had very robust continuity plans in place in advance of the Games.

Changes made to travel to work during the Games

Five per cent of regular hotspot users were away from London during the whole Olympic Games, of which half stated that their decision was influenced by the Games. Of those who remained in London during the Games, the majority of regular hotspot users (57 per cent) stated that they made no change to their journey to work during the Olympic Games.

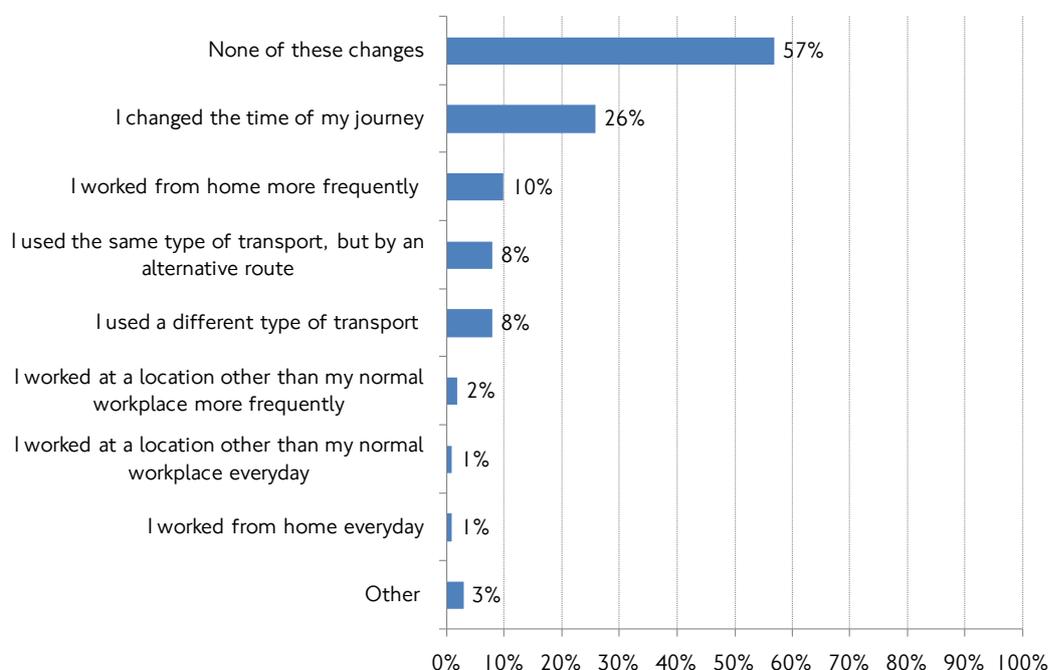
Of the 43 per cent who did make changes to their travel to work during the Games:

- 50 per cent reduced their travel by taking annual leave to attend an event (33 per cent), 3 per cent took annual leave for the whole Games period, working from home more frequently than normal or everyday (11 per cent); or working at a different location to their normal workplace more frequently than normal or everyday (3 per cent);
- 25 per cent of regular hotspot users in London re-timed their journey;
- 7 per cent re-routed their normal journey to work; and
- 7 per cent chose to re-mode their normal journey to work.

Although, there are differences between the results of this survey and the personal travel panel survey, it is clear that reducing and retiming were the most popular changes made by commuters and regular hotspot users travelling to work.

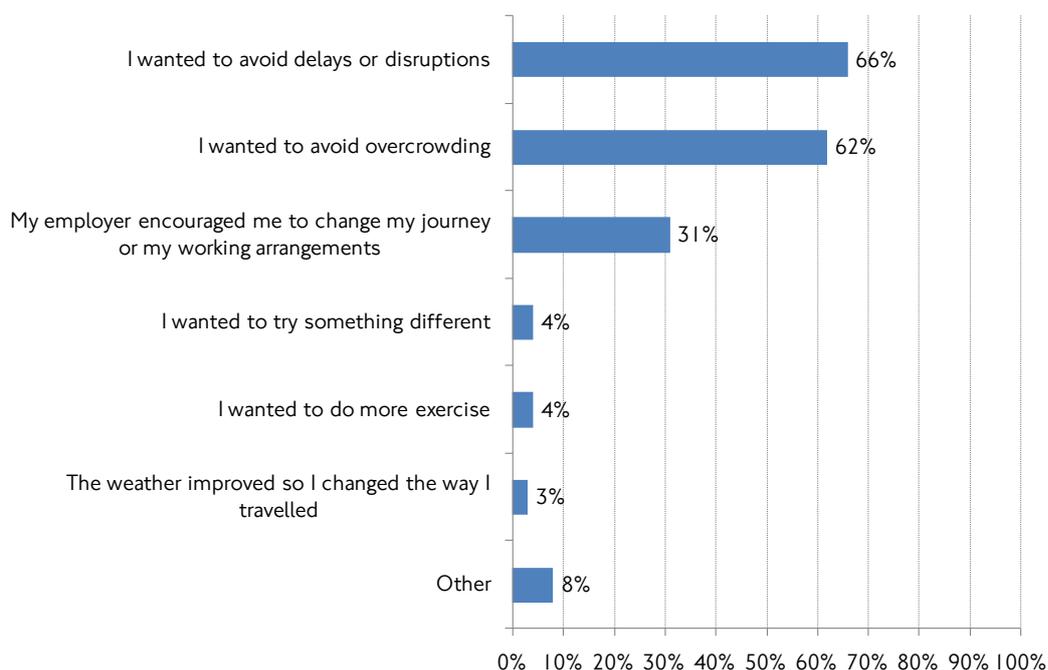
In line with the results for all commuters, those who changed mode tended to move away from public transport, instead primarily choosing to travel by walking and cycling. Of those who re-timed, more chose to travel earlier rather than later. Regular hotspot users mainly changed their journeys to work to avoid delays, disruptions or overcrowding (see Figure 6.6).

Figure 6.5 Changes made to travel to work during the Games by regular hotspot users.



Note: Respondents can give more than one reason so total is more than 100 per cent
Source: TfL Oyster and Hotspot User Survey 2012
Base: 2,524 all respondents in London during the Olympic Games

Figure 6.6 Reasons why regular hotspot users changed their journeys to work during the Olympic and Paralympic Games.



Source: TfL Oyster and Hotspot User Survey 2012

Base: 1,227 all respondents making a change to their journey to work during the Olympic or Paralympic Games

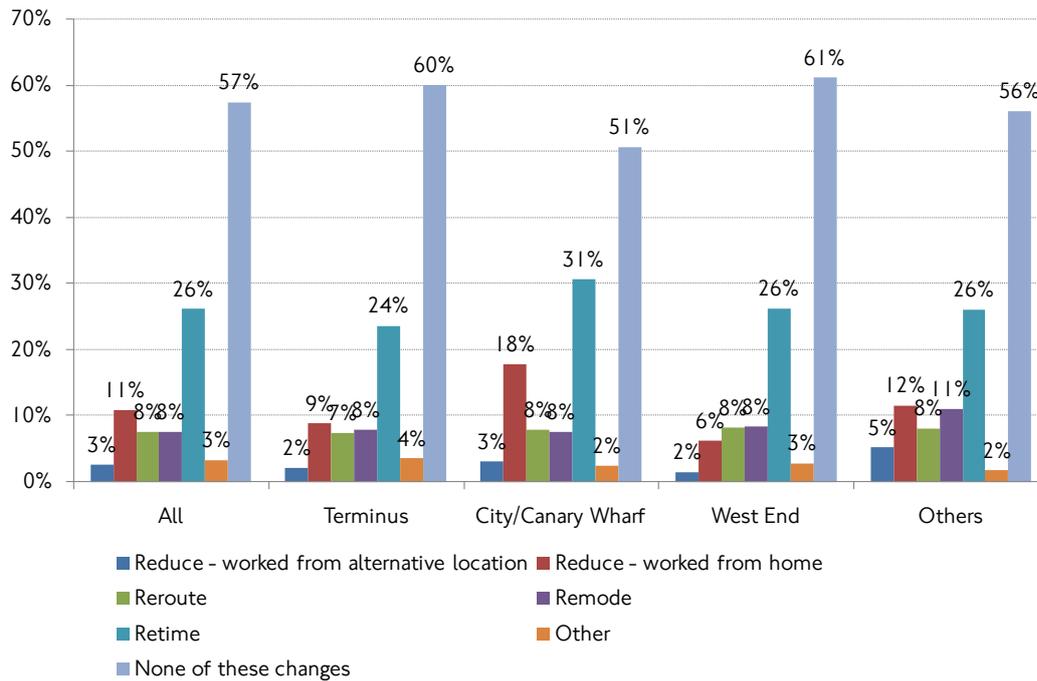
The hotspot stations were grouped into four categories:

- Terminus group: Paddington, Marylebone, Euston, King's Cross, St Pancras, Liverpool Street, Waterloo, London Bridge, Victoria and Charing Cross;
- City/Canary Wharf group: Bank, Canary Wharf;
- West End: Oxford Circus, Leicester Square, Piccadilly Circus, Bond Street; and
- Others: Blackfriars, Fenchurch Street, Cannon Street.

Regular users of the City/Canary Wharf stations were the most likely to have made changes to their journey (49 per cent) and users of West End stations were the least likely to have done so (39 per cent).

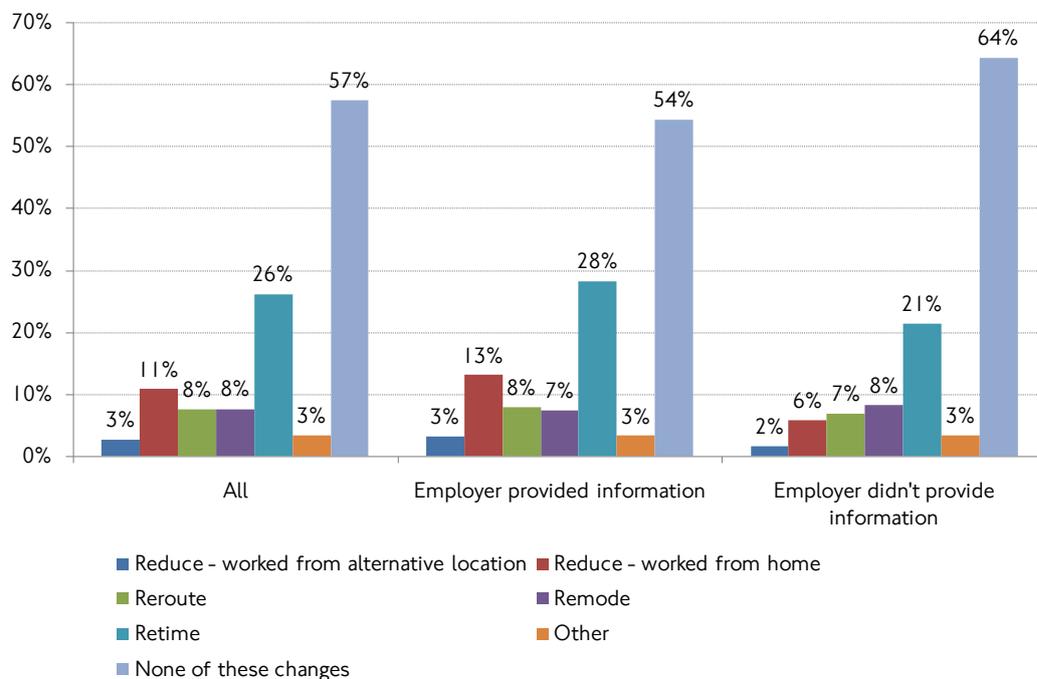
In particular, regular users of the City/Canary Wharf stations were more likely to have re-timed or reduced their travel to work, changes that typically need to be supported by your employer. As shown in Figure 6.7, commuters whose employer had provided them with information about changing their travel during the Games were significantly more likely to make a change (46 per cent of those who received information changed their travel to work compared to 36 per cent who didn't received information). The Canary Wharf Group was extremely proactive in encouraging local businesses to plan for the Games and employees working in Canary Wharf were more likely to have received information from their employer about how to plan their travel.

Figure 6.7 Changes made to travel to work during the Games by regular hotspot users by station group.



Note: Respondents can give more than one reason so total is more than 100 per cent
 Source: TfL Oyster and Hotspot User Survey 2012
 Base: 2,524 all respondents in London during the Olympic Games

Figure 6.8 Changes made to travel to work during the Games by whether regular hotspot users received information and advice about travel during the Games from their employer.



Note: Respondents can give more than one reason so total is more than 100 per cent
 Source: TfL Oyster and Hotspot User Survey 2012
 Base: 2,524 all respondents in London during the Olympic Games

Focus on: Canary Wharf

Canary Wharf has a working population of 100,000 people employed in a diverse range of organisations, including finance, technology, energy, public sector and media. The area was identified as a Games hotspot and therefore was a key focus for the Travel Demand Management Travel Advice for Business Programme.

TfL worked closely with Canary Wharf Group (the property development group which builds, owns and manages the Canary Wharf estate, 15 million sq ft of office space and 700,000 sq ft of retail space) to prepare businesses located on the estate.

Canary Wharf Group worked in partnership with local stakeholders and TfL to provide information and support to businesses. Canary Wharf Group expected a 25 per cent drop in usual peak time public transport commuters during the Games. A wide range of initiatives was undertaken to mitigate the impact of the Games, including additional capacity on the public transport network, encouraging flexible working and reducing freight traffic through consolidation and stock-piling.

Two test days organised by Canary Wharf Group for businesses across London allowed businesses to test their plans. Over 100 companies across London tested a variety of measures with their staff, looking at IT, telecommunications and transport requirements. Following the test days, 80 per cent of companies who tested their plans were confident that their business could cope during the Games.

The case studies highlighted that the impact of the Games on commuting was a major concern for businesses in Canary Wharf. One large financial and business services company with their UK Head Office in Canary Wharf undertook a number of activities to mitigate the impact of the Games. This included relocating 120 staff to their resilience centre outside of London (there was space for 180). A target of 50 per cent working from home during the Games was achieved and annual leave was between 17 and 20 per cent higher than normal. Business travel was also reduced. For those who did travel to Canary Wharf, the business encouraged re-timing and noted that some employees left work earlier and then worked from home in the evening; they also encouraged re-moding and saw cycling increase by 10 per cent; re-routing was also encouraged. The major benefit of the Games was that they were able to test business continuity measures.

A small financial and business services company joined with other companies in the same building to qualify for Site Specific Advice (which was available to businesses over 500 employees). The company encouraged annual leave and allowed working from home for fee earners and managers. Employees who were not able to work from home were encouraged to change the time of their journeys. The company also undertook a dress down policy for the Games to encourage walking and cycling and, before the Games, led walking and cycling outings with staff during lunch breaks. Business travel was also reduced. Since the Games, the company has continued with the walking and cycling club as well as a number of initiatives to reduce the number of deliveries.

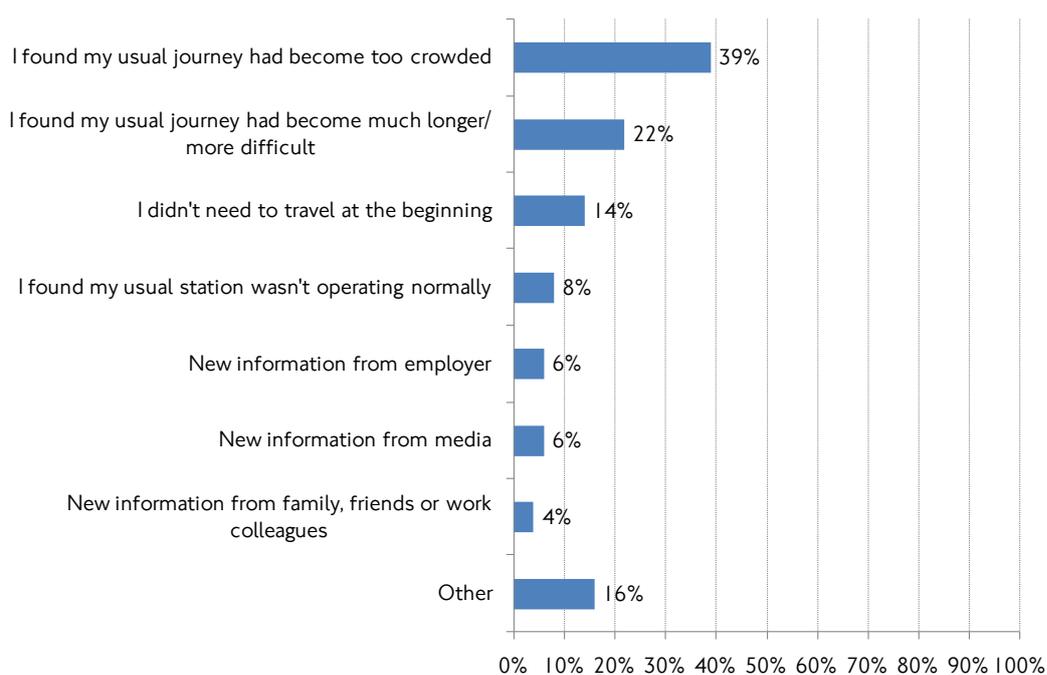
Duration of changes in travel to work

One third of those who made a change to their travel to work, sustained the change for the whole of the Olympic Games. Two fifths made the change only at the beginning of the Games and then returned to their normal travel patterns and one fifth only made the change after the first few days of the Olympic Games.

The majority of regular hotspot users who decided to make a change after the first few days of the Olympic Games stated that they made the change because of crowding on their usual journey (39 per cent), shown in Figure 6.9. Two fifths found that their usual journey had become much longer or more difficult. The experience of travelling appears to have been the motivating reason for changing travel patterns after the first few days of the Games rather than new information. Two thirds of regular hotspot users who changed their travel during the Games sustained this change throughout, and the remaining third gradually resumed their normal travel patterns.

As shown in Figure 6.10, the majority (80 per cent) of those who returned to their normal travel patterns did so because they felt the change wasn't necessary.

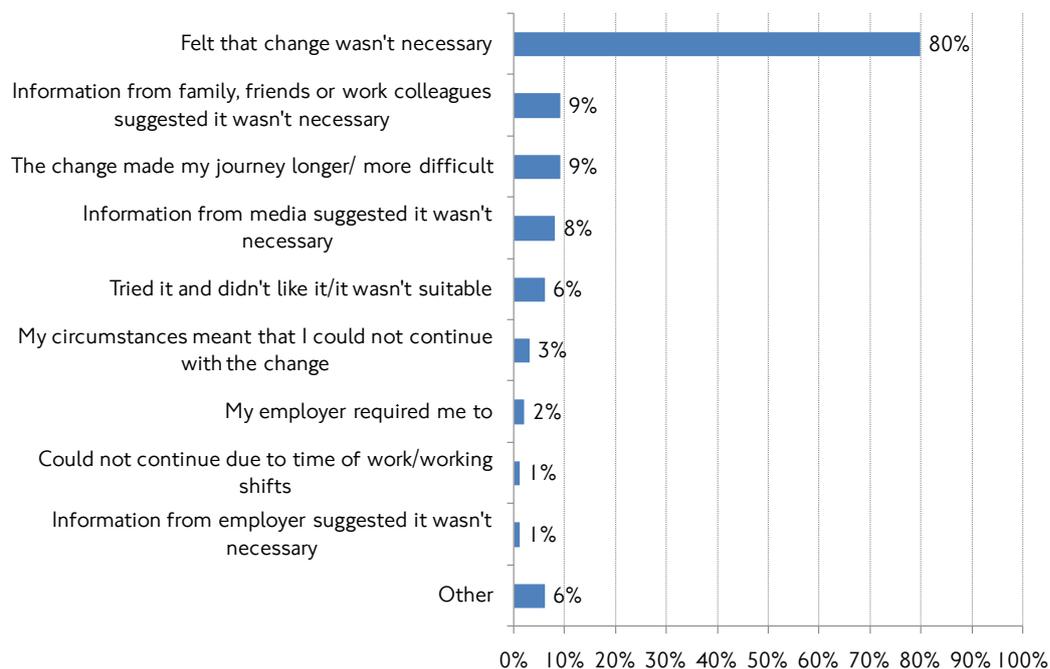
Figure 6.9 Reasons why regular hotspot users decided to travel their usual journey to work after the first few days rather than at the beginning of the Games.



Source: TfL Oyster and Hotspot User Survey 2012

Base: 223 all respondents who made a change after the first few days of the Olympic Games

Figure 6.10 Reasons why those who made a change to their travel to work returned to their normal travel patterns before the end of the Olympic Games.



Source: TfL Oyster and Hotspot User Survey 2012

Base: 384 respondents who returned to their normal travel patterns after making a change during the Olympic Games

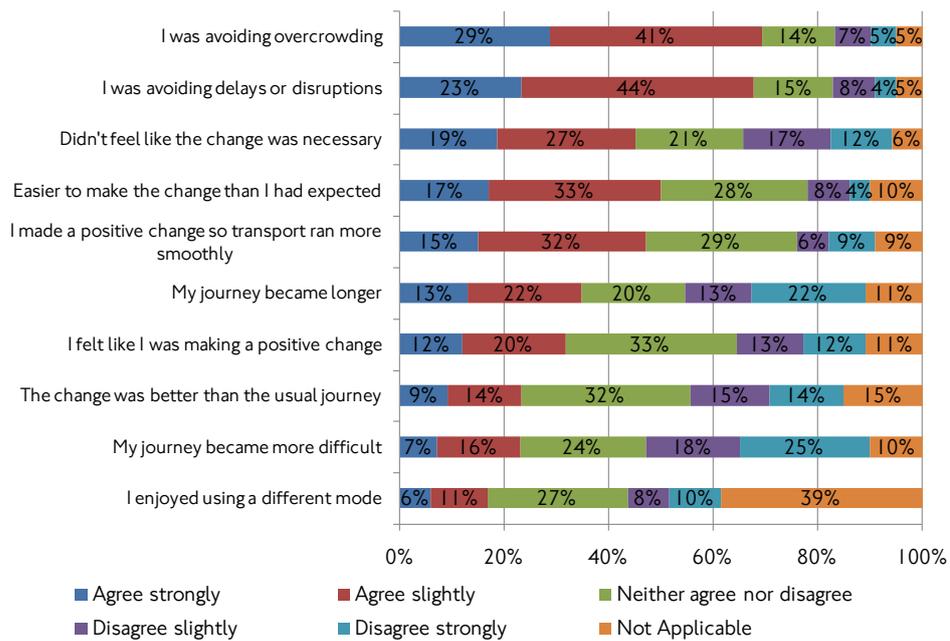
Regular hotspot users' experience of changing their travel to work during the Games

Overall, those who made a change to their journeys to work during the Games felt that this had been a positive experience, in comparison to their expected Games-time journey experience had they not made a change.

There was general agreement that it had been easier to change their journey to work than expected (50 per cent agreed and 12 per cent disagreed), and that the change made them feel they were helping transport run more smoothly during the Games (47 per cent agreed and 15 per cent disagreed).

Hotspot users tended to disagree that the changes made their journey better (23 per cent agreed and 29 per cent disagreed). Those who made changes were split between whether these changes made their journey longer (35 per cent agreed and 35 per cent disagreed) and whether they enjoyed using a different type of transport (17 per cent agreed and 18 per cent disagreed).

Figure 6.11 Regular hotspot user's experience of making a change to journeys.

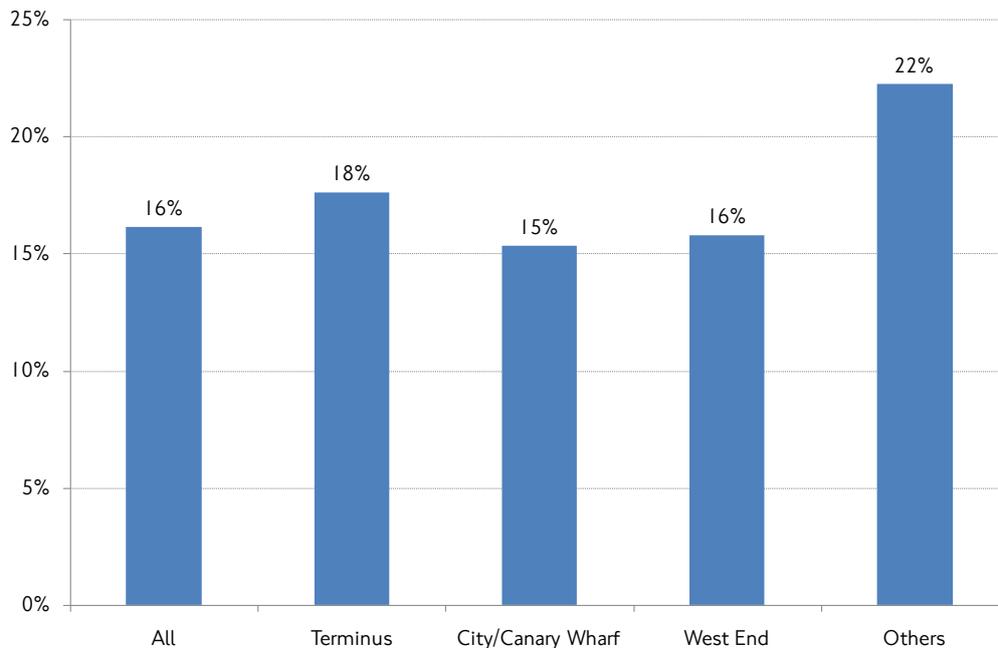


Source: TfL Oyster and Hotspot User Survey 2012
 Base: 1,227 all respondents making a change to their journey to work during the Olympic and Paralympic Games

Sustained change

16 per cent of those who made a change during the Games have sustained that change, equivalent to 7 per cent of all regular hotspot users (see Figure 6.12).

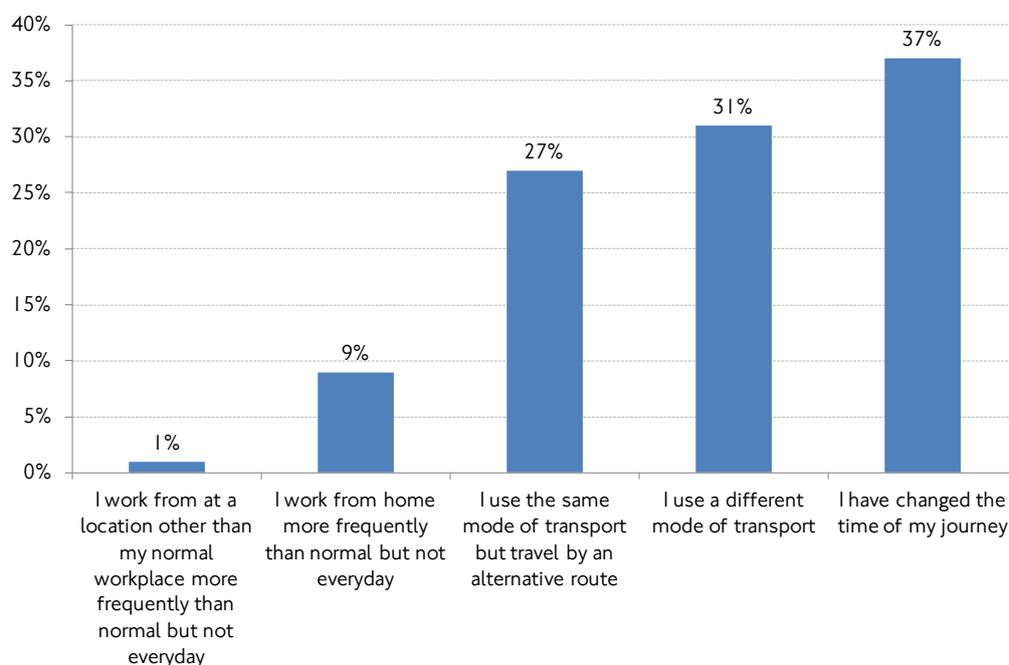
Figure 6.12 Proportion of regular hotspot users who changed their journey to work who have continued with that change.



Source: TfL Oyster and Hotspot User Survey 2012
 Base: 1,134 all respondents who made a change to the journey to work during the Olympic or Paralympic Games

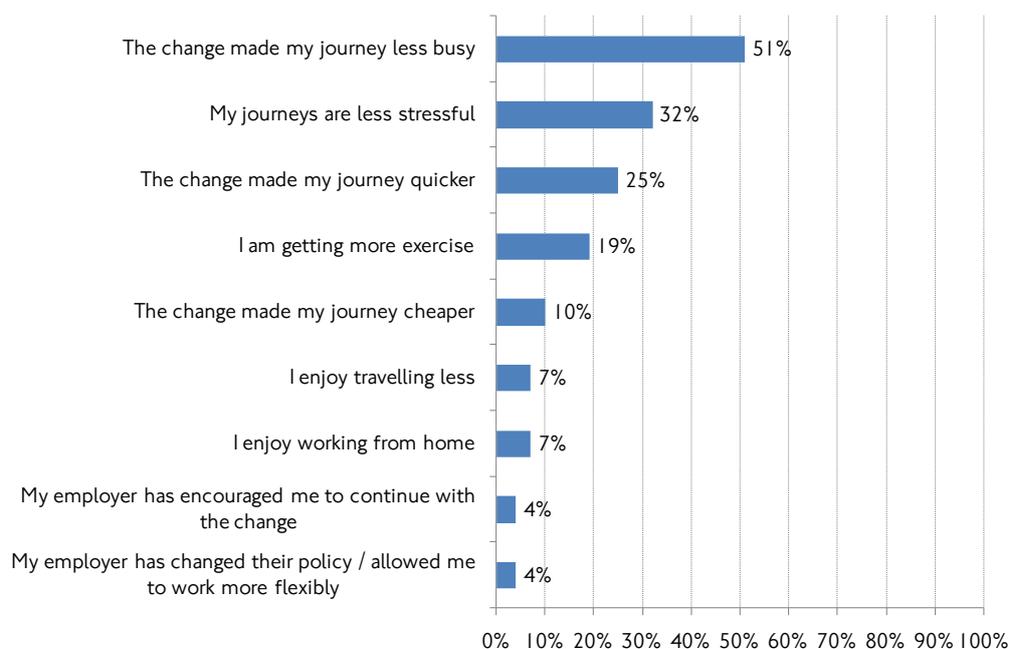
Over a third of those who sustained a change, have changed the time of their journey to work and just under a third have continued to use a different mode (see Figure 6.13). The reasons given for sustaining a change were that the new journey was better – because it was less busy (51 per cent), less stressful (32 per cent) or quicker (25 per cent) – see Figure 6.14.

Figure 6.13 Type of change made by regular hotspot users who changed their travel during the Games and have sustained this change.



Source: TfL Oyster and Hotspot User Survey 2012
Base: 183 all respondents who continued with a change, by type of change made

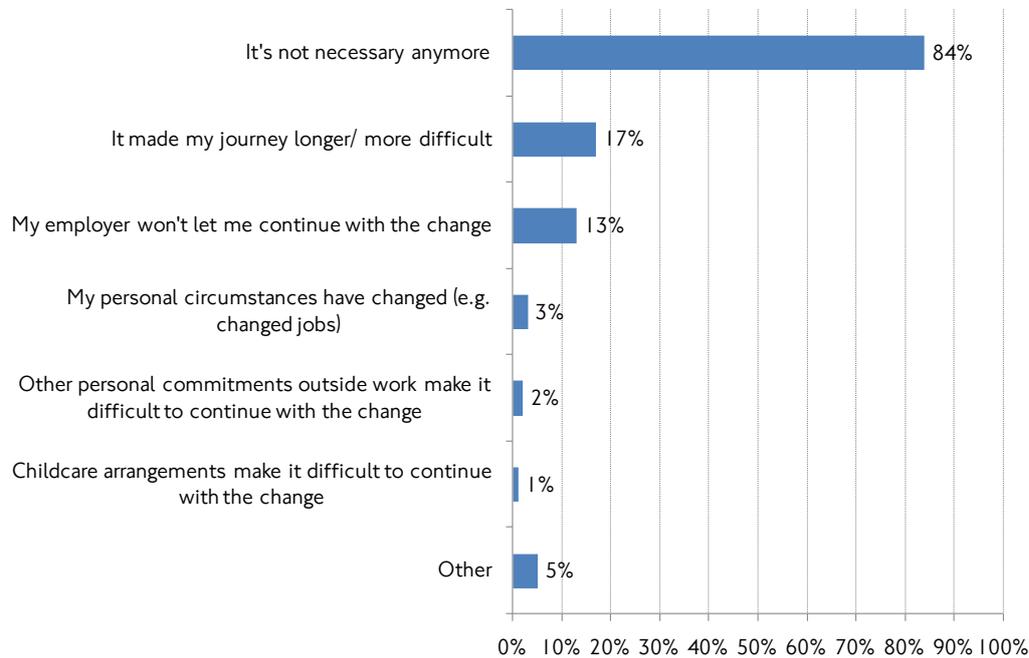
Figure 6.14 Reasons for sustained change.



Note: Respondents can give more than one reason so total is more than 100 per cent
Source: TfL Oyster and Hotspot User Survey 2012
Base: 183 all respondents who continued with a change

The vast majority reverted to their previous travel patterns because they felt the change was no longer necessary (84 per cent). For 17 per cent, it had made their journey longer or more difficult and 13 per cent were prevented from sustaining the change by their employer.

Figure 6.15 Reasons given for regular hotspot user reverting to their original travel patterns.



Note: Respondents can give more than one reason so total is more than 100 per cent

Source: TfL Oyster and Hotspot User Survey 2012

Base: 818 all respondents who have not continued with a change

Conclusion - Focus on public transport hotspots

Research with regular hotspot users has revealed the importance of working with employers to deliver changes to work travel: commuters who received information and advice from their employers were more likely to change their travel to work during the Games. In particular, it was only through the actions of employers that employees were able to reduce or significantly re-time their journeys.

Regular hotspot users preferred the information they receive about changes that will affect their travel to be by email and text messages, and to be specific and related to their journeys. Regular hotspot users used their knowledge of London and its transport system to 'sense check' the information they received from TfL and the ODA. There was some awareness that TfL's Journey Planner was suggesting 'unusual' routes and these suggestions were generally ignored by regular hotspot users.

7. Understanding the influence of employers

Earlier chapters of this report have shown that employers had a significant influence on whether individuals made changes to their journeys especially commute trips. This section explores in more detail how businesses responded to the Games, and the effect this had on their employees. TfL and ODA undertook a Travel Advice for Business (TAB) programme as part of the Travel Demand Management programme for the Games. The TAB programme worked with businesses across London (focussing on businesses in central London and those who close to the Games venues, ORN and PRN) to provide information to help them continue to operate during the Games.

This chapter focuses on how businesses influenced commuting and business journeys. For more information on servicing and delivery as well as freight operations during the Games, see the Olympic Legacy Monitoring: Freight Activity in London report. This Chapter draws on the TfL Business and Freight Survey, waves one to three, and from TfL's Business Case Studies. The methodology of these surveys is described in Chapter 2.

Key findings:

- Businesses had generally planned for the Games through their business continuity teams and were focused on how best to manage risk. They had found the information and support provided by TfL helpful and informative.
- A third of businesses operating in those parts of London most affected by the Games encouraged their employees to change their working patterns, for example by changing annual leave patterns, working hours or encouraging working from home or in other locations. The most popular change was to allow different start or finish times, introduced by a quarter of affected businesses.
- Most businesses (84 per cent) did not intend to sustain any changes made to working patterns, typically because it was not considered necessary.
- Annual leave policies varied significantly depending on the needs of businesses – some were able to encourage staff to take leave whilst others needed 'all hands on deck' to cope with increased demand in Games-time.
- Some businesses planned flexible working, whilst others operated a 'wait and see' approach, and some others did not feel it was appropriate for them. Businesses made changes such as extending office hours, introducing remote working technology, or relocating employees. Some reported longer term benefits as a result.
- 45 per cent of businesses in areas most affected by the Games encouraged their staff to make changes to their travel patterns, with many providing information on alternative routes and modes.
- Just two in ten of the businesses that introduced initiatives to encourage staff to change their travel patterns maintained those changes after the Games.
- Many businesses changed the time of meetings to before or after the Games, or placed restrictions on international business travel to and from London during the Games. The use of video and telephone conferencing was limited largely because the short period of time affected meant meetings could be moved relatively easily.

Engaging with businesses

The Travel Advice for Business programme involved substantial engagement with businesses in London, focusing on those most likely to be affected by the Games (i.e. those in central London, close to Games venues and the ORN/PRN). The programme included workshops and site specific advice - a travel planner allocated to work specifically with a business to develop an action plan to reduce and manage the impact of the Games on their operations. The Get Ahead of the Games website also included information for businesses as well as individuals.

Businesses were positive about the information they received from TfL. For the vast majority of businesses, planning for the Games was undertaken through their business continuity teams. Planning was therefore generally conducted in terms of risk management, which enabled businesses to target their efforts to the areas where adaptations would be both practical and provide business continuity benefits.

Businesses felt that the transport network had worked better than expected during the Games and that TfL deserved praise for this. Many of the businesses felt that there was some 'scaremongering' in the information TfL provided to businesses, though this was felt to be the correct approach to ensure that businesses and individuals had acted and changed their travel behaviour. There was a feeling that TfL planned for the worst case scenario which resonated with the business continuity managers who also take a risk-based approach to planning. For example:

"Whilst it was noted that the message from TfL seemed to be pessimistic and very much a scare tactic, they accepted that it dissuaded people from travelling into London and, as a result, travel experiences were generally good."

Small business, Wholesale and retail sector, Westminster

"Overall we were very happy with the support provided by TfL as we felt we were prepared. But also, as an organisation, TfL kept London running during the Olympics so for that they should be commended."

Large business, transport and communication, Camden

TfL Travel Advice for Business Workshops

The Travel Advice for Business workshops provided an overview of the likely impact of the Games on the transport network and therefore businesses by presenting London-specific analysis and highlighting issues that had occurred at previous Olympic and Paralympic Games. The workshops provided the first opportunity for businesses to understand the possible impact of the Games on them. A high proportion of businesses highlighted the images of disruption at previous Games as helping them to understand the scale of the challenge presented by the Games. It was clear that these images stuck in the minds of workshop attendees and that were used to engage senior management back at base:

"Images of transport disruption at the Atlanta and Beijing Olympics were helpful for focusing minds on the need to plan for the Games."

Small business, finance and service sector, Westminster

Businesses said the workshops were helpful in explaining the analysis and directing them to the relevant web-based information. Some found the Get Ahead of the Games website to contain a daunting level of information to use without assistance.

Businesses found the workshops to be useful for networking with others who were planning for the Games, enabling them to discuss issues and solutions and gain knowledge from others facing the same challenges.

Although businesses were generally positive about the workshops, some felt that there was a need to make the workshops more sector-specific especially for sectors which operated very differently to others, for example, the health sector.

Site Specific Advice

TfL allocated large businesses (greater than 250 employees) a travel planner to work specifically with them to develop an action plan, with the aim of reducing and managing the impact of the Games on their operations. This often also involved undertaking a Staff Travel Survey to provide an evidence base for the action plan.

The Site Specific Advice was found to be very useful. Businesses found the bespoke support helpful to guide them through the Games planning process and to direct them to the most relevant information. A number of businesses asserted that having the travel information and support from the Site Specific Advice gave the action plan more credibility than if it had been produced internally to the business. Site Specific Advice was of most benefit when the travel planner had strong experience of working with a particular sector. However, the advice was less useful if the travel planner did not have knowledge of the sector and the impact of transport on the businesses operations or didn't have detailed knowledge of the local area.

“The Trust was really grateful that the Site Specific Advisor was able to brief the Joint Staff Committee on what other hospitals were doing. Which gave them reassurance that they were taking the right approach. Having the Site Specific Advisor assist in the process was of real benefit in this regard, as she was well aware of best practice in the health sector.”

London based NHS Trust

“Site Specific Advice came in the form of four sessions to determine the nature of the business and how it would be affected by the Olympics. [The Business] was pleased that TfL wanted to engage with them at an early stage and noted the personal touch from TfL in communicating information that was specifically focused and engaging.”

Large business, transport and communication sector, Camden

Web based information

The TfL and Get Ahead of the Games web sites were found to be very useful by businesses, with specific mention made of how the two websites appeared to link well together without the businesses really being aware that they were moving between the two different sites.

Businesses were pleased that all the Games related travel information had been bought together into one central location and felt that the way the information was presented was very useful (for example, the station hotspot maps, station grids of the busiest times, road heat maps and ORN/PRN maps).

Some businesses found it difficult to digest all the information and pick out the points most relevant to their business operations.

“[Business] found that there was a lot of TfL information available and it took a lot of time to pull it all together and extract the relevant information. [Business] needed to use the TfL information to consider the potential transport disruption to each of its 120 sites within the M25; this was a lengthy process”

Large business, Servicing (utilities and facilities) sector, Lambeth

TfL Travel Updates and Live Alerts

TfL provided daily emails describing the impact of the Games on the transport network the next day as well as text and twitter messages giving live information about any issues on the transport network.

The summary updates were very well received by businesses, especially those who struggled to identify the key points from the information on the web. The alerts would often be received by one individual who would decide of the relevance of the information and forward to employees if appropriate. In some businesses the messages would go straight to the employees.

A number of businesses mentioned that they would like these sorts of messages to continue in the future. Live information is already available from TfL so there could be work to do to improve the awareness of this information.

Planning for the Games: annual leave and flexible working

Annual Leave

Games time annual leave policies varied widely between businesses. The annual leave policy that was adopted by each business was largely dependent on their business' forecasts for the Games and the level of disruption they expected. As would be expected, this varied by sector. Hotel, restaurant and entertainment sectors expected Games-related tourism so generally limited the amount of annual leave (and in some cases increased staffing levels). The financial services sector did not generally expect Games-time to bring more business and had some concerns that productivity may be affected by travel disruption, and therefore were more likely to encourage annual leave during the Games.

Flexible Working

Businesses appeared to adopt one of four approaches to flexible working:

- Plan and implement;
- ‘Let’s wait and see, but do whatever is easiest for you’;
- ‘Let’s wait and see, but get in (to the workplace) if at all possible’; or
- No change to normal.

There were three main types of flexible working promoted by businesses, changing employees' working hours, relocating employees and encouraging working from home.

Changing working hours

The majority of office-based businesses in areas most affected by the Games allowed their employees to change the time of their working day during the Games. Many offices adjusted

their opening/closing times to increase available working time. Non-office based businesses were generally more restricted in terms of the flexibility that they could allow their staff during the Games. For the majority of staff in hospitals, restaurants, retail stores, hotels, theatres and cinemas there was no option of changing the time of journeys to and from work. However, most businesses within these sectors had a proportion of non-operational employees who were office-based and able to change the time of their journeys. One hospital stated that around five per cent of their staff re-timed their shift patterns, and the employees from the HR, Communications & PR and Finance departments of a hospitality business were able to change their working hours.

The majority of businesses that could support changes to working patterns encouraged their staff to be flexible and adopt a 'wait and see' approach. This meant that many of London's office-based staff were prepared to change their travel in reaction to the level of disruption on the network. Therefore, if transport disruption had been an issue, employees would have been able to adapt and would have changed their travel times to avoid peak periods.

"Lawyers have typically flexible working patterns and [business] implemented staggered working hours for Games time, recommending 07:00-15:00 or 10:00-19:00 with free breakfast made available at 7:30-8:30 instead of the usual 8:00-8:30. However, working hours reverted to normal after two days, as soon as staff realised there was no significant transport disruption."

Large business, financial and business services sector, Islington

Relocating employees

Several companies made arrangements for employees to work from an alternative location during the Games so as to mitigate the risk of employees being caught up in transport disruption. The scale to which this occurred varied greatly.

"[Business] utilised its Resilience Centre during the Games. The Resilience Centre is an office location that is based out of London (location cannot be disclosed), which is wholly owned by [Business]. The company aimed to relocate 180 staff to the Resilience Centre during the Games. On average there were 120 employees working from the Resilience Centre per day during the Olympic and Paralympic Games."

Large business, financial and business services sector, Tower Hamlets

Working from home

Businesses who adopted the 'let's wait and see, but get in if at all possible' approach to working from home were generally office based businesses, such as the financial services sector.

A business that adopted the 'Let's wait and see, but get in (to the workplace) if at all possible' approach said:

"Staff tended to take a 'wait and see' approach whereby they started off travelling as per usual. As it turned out the public transport operated well and so staff stuck to their normal commuting patterns. If the transport had been horrendous then far more working from home and retiming of the working day would have been expected."

Large business, finance and service sector, City of London

A business that adopted the 'plan and implement' approach said:

"Staff were instructed, where possible, to work away from the office and only come in if they had a very good reason. This was straightforward to initiate as almost every member of staff is set up and able to work from home. This was extremely successful with records indicating that at least 85 per cent of staff working at home during the Games although this does include those that already work at home. This is significantly greater than the 57 per cent predicted from the staff survey."

Large business, transport and communication sector, Lambeth

Businesses who adopted a 'no change to normal' approach to working from home typically did so due to the nature of their business. Many non-office based employees were required to be at their place of work to undertake their role (e.g. health, wholesale and retail, hotel, restaurant and cinema and theatre sectors).

However, there were some businesses that adopted a 'no change to normal' approach that did not fall into one of these sectors. Some office-based organisations decided that they would not promote working from home during the Games.

"It was made clear to staff early on that they were expected to strictly adhere to normal business hours in the office during the Games; there were to be no Olympic related excuses for absenteeism. Staff were given all the relevant travel information (via links to TfL sources) and it was up to them to plan their journeys to ensure that they got to the office in time. The normal office hours of 8am – 6pm were not altered during the Games.

All 32 of the equity partners at the firm have one remote working day per week as normal practice. The company only has the capability for 6 employees to log on remotely at any one time and therefore they did not increase the number of days that they spent working from home."

Small business, finance and service sector, Westminster

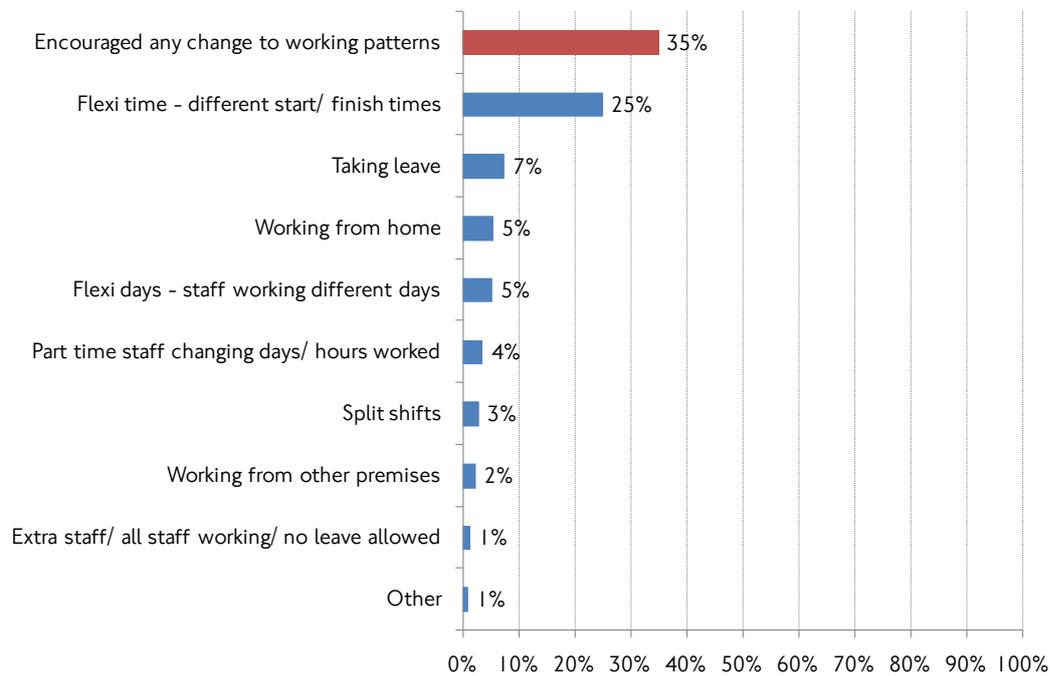
"[Retail] Oxford Street was less flexible during the Games times that they normally would be. The store planned for the best employees to work in the Oxford Street store to ensure that they maximised the business opportunities arising at Games time. Annual leave was effectively banned given the nature of the business. Staff were encouraged to test the robustness of the public transport network before the Games."

Small businesses, wholesale and retail sector, Westminster

Changes to working patterns during the Games

Surveys conducted with businesses operating in parts of London most affected by the Games (i.e. in Central London, on the ORN/PRN and around Games venues) found that a third actively encouraged a change in working patterns amongst their staff during the Games. The most popular change was a change to start and finish times of the working day to avoid travelling through the busiest periods on the transport network. Figure 7.1 shows the proportion of businesses in areas affected by the Games that encouraged employees to make changes to their working and travel patterns, by the type of change.

Figure 7.15 Proportion of businesses that encouraged changes to working patterns by type of change encouraged.

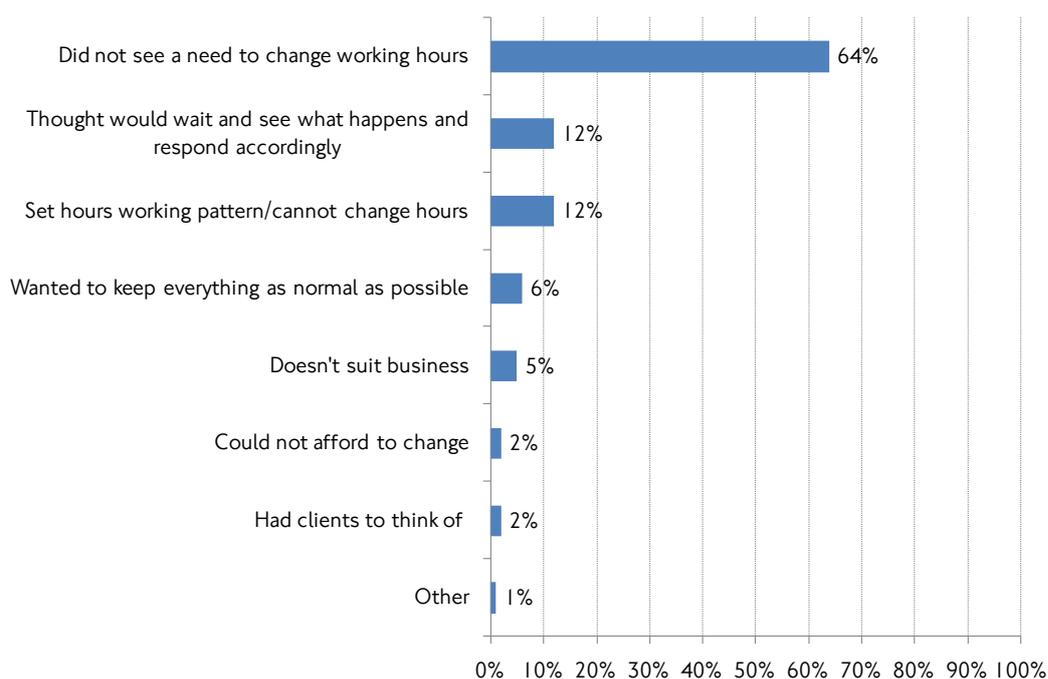


Note: Respondents can give more than one reason so total is more than 100 per cent
 Source: TfL Business and Freight Panel Survey
 Base: 1,004 respondents to wave 3

Businesses in the transport and communications sector were the most likely to encourage changes to working patterns compared to other sectors (38 per cent). Businesses in the wholesale and retail sector and hotel and catering sector were the least likely to encourage changes to working patterns (32 and 34 per cent respectively). This reflects the fact that retail, hotel and catering staff tend to work shifts and need to be on-site at specific times.

The main reason why businesses did not encourage changes to working patterns during the Games was that they didn't see a need to change working hours (64 per cent), shown in Figure 7.2. Other reasons were that it was not possible to change working hours (12 per cent) and that they would wait and see what happened during the Games (12 per cent).

Figure 7.16 Reasons why businesses did not change working patterns during the Games.



Note: Respondents can give more than one reason so total is more than 100 per cent

Source: TfL Business and Freight Panel Survey

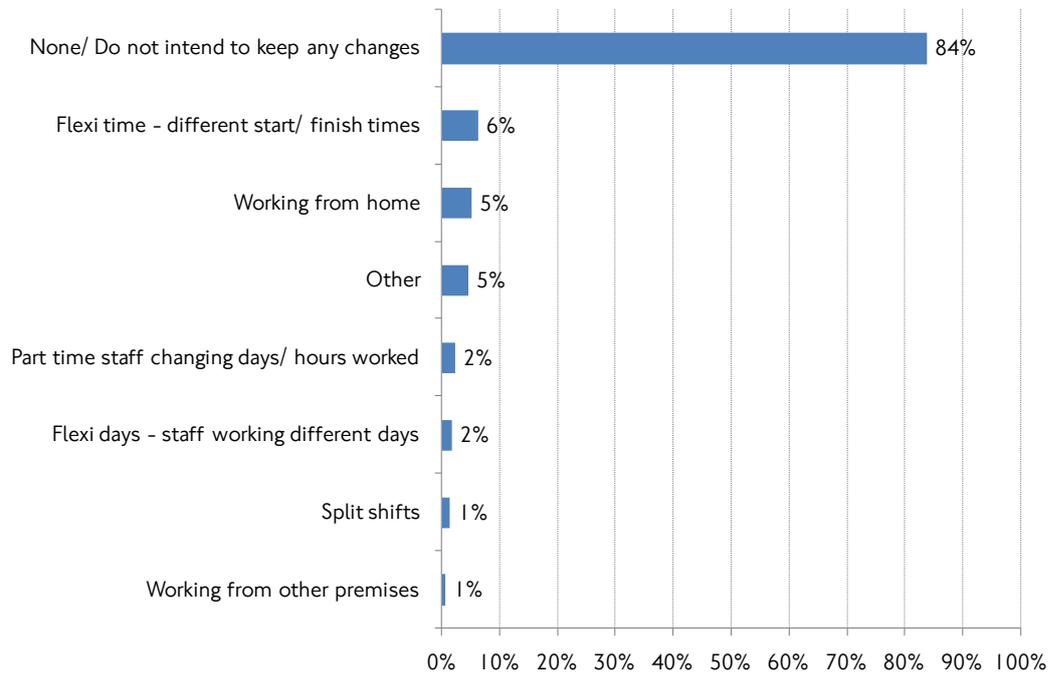
Base: 466 respondents who didn't make a change

Sustained changes to working patterns

The majority of businesses (84 per cent) who encouraged changes to working patterns during the Games did not intend to maintain these changes following the end of the Games, as shown in Figure 7.3. In total, 6 per cent of businesses that introduced different start and finish times during the Games intended to maintain the change, 5 per cent of those that introduced working from home and 5 per cent that introduced other changes intended to maintain the change.

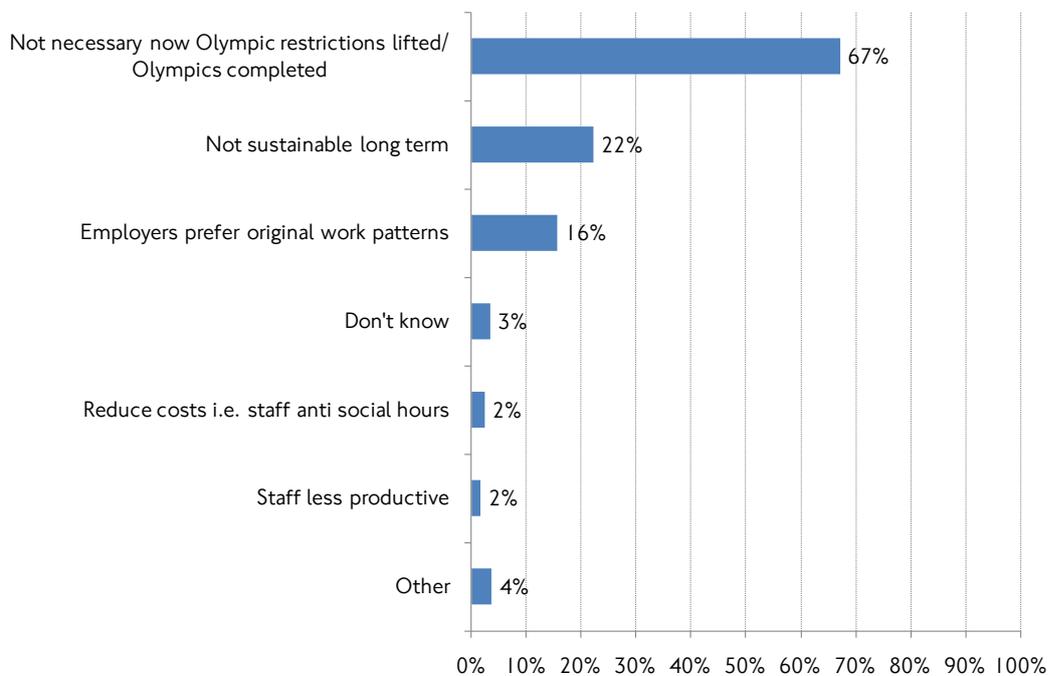
The main reason why changes to working patterns were not sustained following the Games was because businesses felt it was no longer necessary (67 per cent of businesses who did not maintain changes to working patterns). Two in ten businesses did not maintain the changes because they were not sustainable in the long term. The reasons given by businesses for not maintaining a change to working patterns after the Games are shown in Figure 7.4.

Figure 7.17 Proportion of businesses that encouraged changes to working patterns and intended to maintain the change after the Games.



Note: Respondents can give more than one reason so total is more than 100 per cent
 Source: TfL Business and Freight Panel Survey
 Base: 353 respondents who encouraged changes to employees travel patterns during the Games

Figure 7.18 Reasons why businesses did not maintain changes to working patterns after the Games.



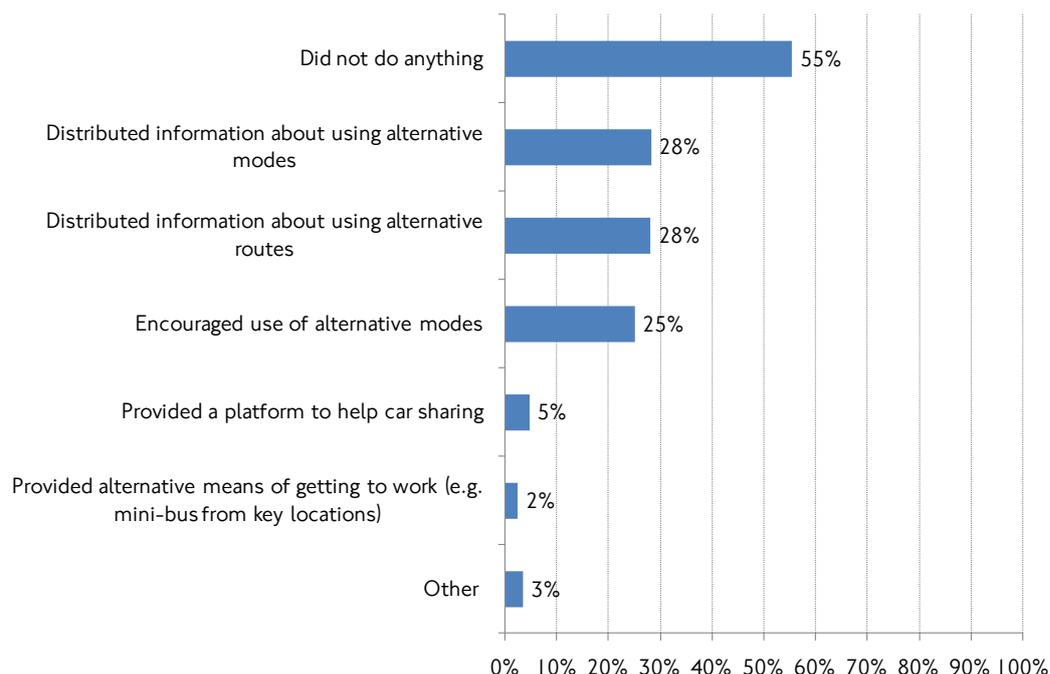
Note: Respondents can give more than one reason so total is more than 100 per cent
 Source: TfL Business and Freight Panel Survey
 Base: 301 respondents who did not maintain changes to working patterns after the Games

Planning for the Games: encouraging use of different routes and modes

Encouraging changes to travel patterns

Almost half (45 per cent) of businesses in areas affected by the Games encouraged their staff to make changes to their travel patterns during the Games. As shown in Figure 7.5, the most popular initiatives undertaken were to provide information on alternative modes (28 per cent) and routes (28 per cent) and encourage the use of alternative modes (25 per cent).

Figure 7.19 Initiatives undertaken by businesses in areas affected by the Games to encourage changes to the travel patterns of their employees.



Note: Respondents can give more than one reason so total is more than 100 per cent
Source: TfL Business and Freight Panel Survey
Base: 1004 respondents to wave 3

Businesses in the wholesale and retail sector were the most likely (50 per cent) to encourage employees to change travel patterns and businesses in the hotel and service sector were the least likely (34 per cent) to encourage changes to employees travel patterns.

As with changes to working patterns, the main reason businesses did not encourage change was because they did not feel it was necessary (63 per cent).

Encouraging walking and cycling

In line with the Travel Demand Management and Active Travel programmes, businesses encouraged their employees to walk and cycle more during the Games.

The Legible London walking maps received widespread praise. Hard copies of the maps were widely distributed to staff, clients and guests and were well used. Some firms went further and undertook specific initiatives to encourage walking such as using a competitive element linked to the Games.

Businesses noted that if employees were walking more, it was the part of their journey between mainline stations and the workplace that was walked.

Businesses reported that the mode shift to cycling was generally lower than the mode shift to walking. The extent to which businesses promoted cycling varied significantly. Some businesses mentioned being nervous about promoting cycling in case one of their employees was injured on the journey to work and some businesses felt that they were unlikely to encourage many employees to change so didn't try.

However, some businesses did report that they had achieved increased levels of cycling during the Games. A number also noted a legacy benefit of increased cycling numbers after the Games. A small financial services business in the City of London reported a legacy of more walking/cycling/jogging to work, as a result of which the management have increased the number of showers available at the office.

Sustained changes to initiatives to influence travel patterns

Only two in ten of the businesses who encouraged changes to travel patterns during the Games continued with these initiatives following the Games. As during the Games, the most popular initiatives that were maintained following the Games were to provide information on alternative modes (4 per cent of businesses who encouraged a change during the Games continued after the Games) and routes (4 per cent) and encourage the use of alternative modes (7 per cent).

Businesses that had encouraged changes to travel patterns during the Games and continued to do so after the Games did so because the initiatives worked well (3 businesses), it was better for health, fitness and the environment (2 businesses) and it saved money or was more efficient (one business).

Two thirds of businesses stopped encouraging changes to travel patterns because it was no longer necessary and two in ten because everything had gone back to normal.

Planning for the Games: altering business travel

The Travel Advice for Business programme encouraged businesses to minimise their business travel during the Games either by changing the time of meetings or using technology (e.g. video conferencing, teleconferencing and instant messaging) to reduce the need for travel. If business travel was necessary it was recommended that businesses changed the mode and route of journeys.

A large number of businesses did re-time meetings to before or after the Games. Additionally, many multinational firms placed restrictions on their international business travel to and from London during the Games.

Some businesses emphasised the time and cost savings that were made by using remote working technologies rather than carrying out business travel. For example, a large servicing (utilities and facilities) business in Islington replaced face-to-face meetings with conference calls and reported a 40 per cent decrease in travel expenses on its working from home test days.

Impact on business operations

When considering business performance during the Games, businesses often compared their performance to the expectations that they had prior to the Games, rather than a year-on-year comparison.

The finance and business services sector reported the most positive responses in terms of business performance. These businesses generally reported they were able to operate

'business as usual'; these businesses had generally considered the Games to present a risk to business continuity and therefore getting through without a drop in performance was seen as a great success.

Restaurants, hotels and retail stores were more likely to view the Games as an opportunity than a risk. For these businesses, 'business as usual' was not seen as a positive outcome. The forecast level of business performance depended on the business' understanding of how the Games would affect their revenue. Those that had accurately predicted the impact of the Games were generally more positive as their performance had met expectations.

There were also non-monetary benefits of the Games, with many businesses reporting increased staff morale.

One of the major benefits of the Games was in terms of flexible working and the increased ability of businesses to implement flexible working as part of their business continuity plans. A number of businesses viewed the Games as having given them a change to develop robust continuity plans to cope with issues on the transport network in future.

A number of businesses incurred significant costs preparing for the Games. This was generally seen as a good investment for those businesses who considered the Games as a risk management exercise. However, there were some businesses which had incorrectly predicted the impact of the Games on their business and had over-prepared; they were less satisfied.

Conclusion - Understanding the influence of employers

Businesses based in areas most affected by the Games engaged with the need to influence the travel of their employees. Their response was governed by the need to ensure business continuity during the Games, manage risk and make the most of any opportunities arising from the Games. Therefore, those who did not take measures to influence employees' travel generally did not expect the Games to affect their business.

Providing tailored support and framing messages in terms of business continuity and risk (or, where relevant, maximising business opportunity) are vital to success in engaging with businesses and thus delivering a change in commuter and business travel.

Changes made to business operations during the Games were largely not sustained after the Games, essentially because businesses no longer considered them necessary. However, a number of businesses reported that they now have contingency plans in place to enable flexible working if there is a problem with the transport network as a result of the Games. If encouraging walking and cycling was sustained, this was mainly done for corporate social responsibility reasons.

8. Implications for long term change

The focus of the Travel Demand Management programme was on keeping London moving during the Games, and helping regular London travellers to cope with the busy conditions during Games time. The goal was to encourage those who could do so to change their journeys, freeing up space for the extra travellers brought on to the network by the Games, as well as allowing regular London travellers who still needed to travel to do so. As described throughout this report, and in the fifth Travel in London report, this activity was a major success, with three quarters of all London travellers making some sort of change to their journeys during the Games, leading to an estimated reduction in background travel demand (in other words, normal travel) of 5 per cent during the Olympic Games and 3 per cent during the Paralympic Games. London residents, visitors and workers reported high levels of satisfaction with their journeys during the Games and evidence suggests that for much of the Capital, it was 'business as usual'.

Although the focus was on ensuring a successful Games, it was nevertheless anticipated that the Games may result in some longer term changes to travel patterns. This Chapter assesses the implications of the Games for the longer term, asking: to what extent is there evidence of sustained change greater than the normal 'churn' in travel patterns? Is there any evidence of changing attitudes to travel behaviour change? Or is there evidence of a greater preparedness for planned and unplanned disruption in future?

This Chapter draws on the TfL Personal Travel Panel Survey, waves one to three. The methodology of this survey is described in Chapter 2.

Key findings:

- In total, around 11 per cent of London travellers sustained a change they had made during the Games.
- However, over the same period there has been considerable 'churn' in people's personal circumstances and travel patterns, with one in ten respondents having changing their working status between July and November 2012.
- The impact of normal 'churn' on the time, mode and route of journeys was greater than the impact of the Games: a higher proportion of commuters have made a new journey than sustained a change resulting from the Games. There is some evidence of a Games-related increase in working from home above and beyond the normal background change, as well as indications of a general trend towards increased working from home.
- Relatively few London travellers felt that the changes they had made during the Games had brought them any lasting benefits. The greatest benefit identified was that between a quarter and a third of travellers for all purposes felt better informed to be able to plan their journeys.
- It was thought that the experience of changing travel patterns during the Games might make commuters more responsive to longer term changes but, in fact, after the Games London commuters were much less likely to say they were considering changing their journey to work – 11 per cent compared to 32 per cent beforehand.

- However, there is evidence that London commuters do now consider it to be easier to change their travel behaviour than before the Games. For all types of change, more respondents thought it would be easier after the Games than thought it would be harder.
- The change commuters thought would be easiest was re-timing their journeys and particularly in such a way as to lengthen the working day, so arriving earlier and leaving later.
- 14 per cent of commuters, 15 per cent of business travellers, and 18 per cent of those travelling for other purposes thought that the experience of travelling differently during the Games had made them better able to deal with disruption.
- Most London travellers use the tools available to check for disruption before (84 per cent) and whilst travelling (68 per cent), and 18 per cent said that they were doing so more since the Games. The most common reason given for this was that they got into the habit during the Games.
- In the event of unexpected or planned major disruption, 84 per cent of London travellers said that they would change their journey, 5 per cent that they would not change their journey but would access information before travelling, and 11 per cent that they would travel as normal.
- There is some evidence that London travellers were more likely to make a change in response to disruption than before the Games: the majority of those who had said prior to the Games that they always make their journey in the same way, said that in the event of major disruption they would change their journey (note that we should be careful in drawing a strong conclusion here as the question wording in the two waves was not directly comparable).

Churn or change?

Introduction

The Olympic and Paralympic Games took place over a very short period of time – both lasted approximately a fortnight, with a gap of a fortnight in between. They were also both extremely high profile events. It is therefore possible to identify changes made to travel behaviour directly in response to the Games, as done throughout this report. When looking at longer term change, however, the picture becomes more complex. As time moves on, people's lives change and it becomes more difficult to ascribe the choices they make to any particular policy intervention.

This report presents evidence that some of those who made changes during the Games have sustained those changes, mainly because they had found the new choice to be better in some way, for example because it helped them avoid congestion, crowding or reduced the stress of travel.

So, we can conclude that when an event or intervention encourages (or forces) people to make a change to their travel, some of those who change may in the process discover a better option and choose to stick with it in the longer term. Thus, the disruption acts as a trigger for longer term change. As described in Chapter 3, in total, around 15 per cent of

those who made a change to their journeys during the Games sustained that change after the Games, equivalent to 11 per cent of all travellers.

But, at the same time, the longitudinal research tells us another story: that of the constant 'churn' that takes place on the network as people's lives change with consequent changes to their travel patterns. For example, between wave one of the survey, conducted in June/July 2012 and wave three, conducted in November 2012, a period of just four months, nearly one in ten respondents had changed their working status. Of these:

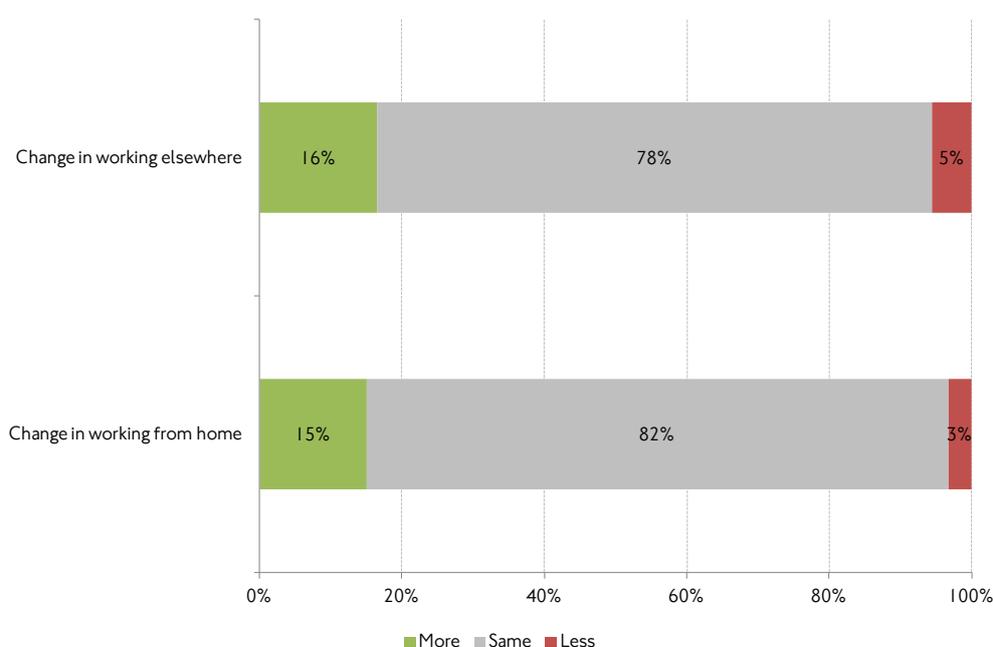
- 3 per cent had moved in to work;
- 3 per cent had remained in work but their working status had changed (for example, they had become self employed or moved from full to part time work);
- 2 per cent had moved out of work; and
- 2 per cent had remained out of work, but their status had changed, for example, they may have moved from unemployment into education.

Comparison of travel patterns before and after the Games - Commuters

After the Games, there is some evidence that London commuters have increased the amount they work from home or from a place other than their usual workplace, at least in part due to the Games. However, over the same period, some have reduced the amount they work from home or elsewhere, for reasons other than the Games. In total, as shown in Figure 8.1, more have increased than reduced the amount they work away from their usual workplace.

Although not all those who increased the amount they work elsewhere said that the Games had influenced their choice, they were much more likely to do so than those who said they had reduced or kept the same the amount they work away from their normal workplace.

Figure 8.1 Change in patterns of working from home or from a location other than the normal workplace, after the Games compared to before the Games.



Source: TfL Personal Travel Panel Survey
 Base: 367 respondents who work from home, 273 respondents who work elsewhere (wave 3)

Furthermore, some previous home workers have stopped working from home since the Games, and some workers have started working from home since the Games:

- 9 per cent of those who worked from home every day or regularly before the Games said that they had not worked from home on an average week since the Games (1 per cent of all workers); but
- 6 per cent of those who did not work from home before or during the Games had since started working from home (4 per cent of all workers).

So we can see that there is some churn, with people stopping, starting, reducing or increasing the amount they work from home as their personal and work circumstances change.

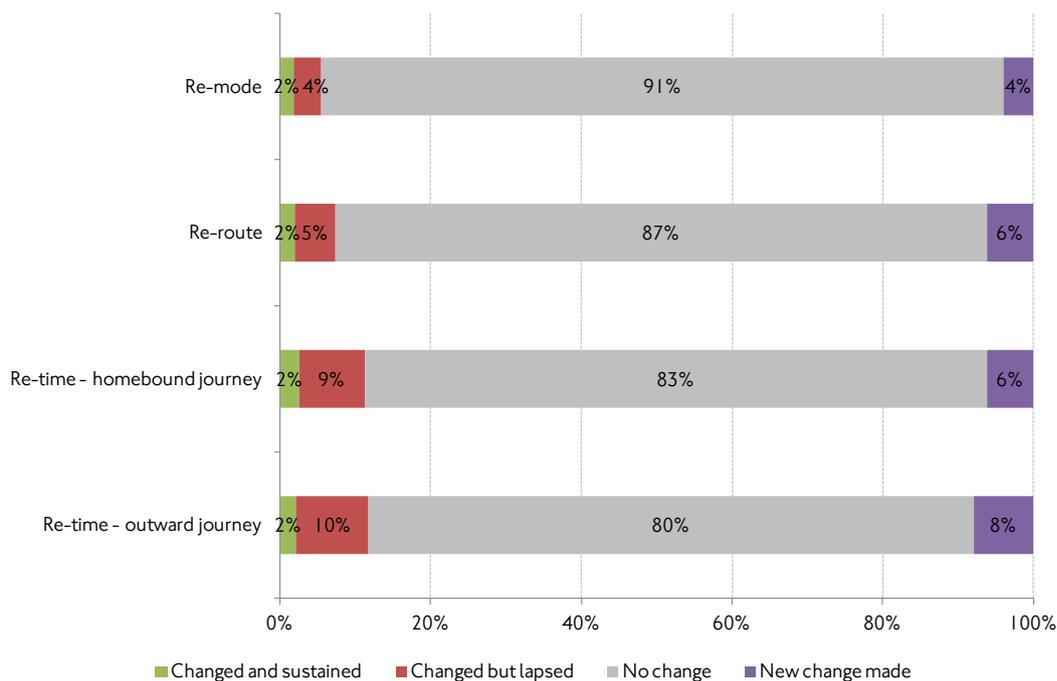
However, it also appears that there is a background trend of increased home working, and that the Games had an influence on this. Workers who did not work from home before the Games, but did so during the Games, were much more likely to say that they now worked from home at least once a week than those who did not work from home before or during the Games (45 per cent compared to 6 per cent).

A similar pattern is suggested for working elsewhere, with more people starting than stopping working elsewhere:

- 1 per cent of workers who worked at somewhere other than their normal workplace (or home) before the Games stopped doing so; but
- 13 per cent of workers started working at a location other than their normal workplace, of whom around half had tried out working elsewhere during the Games. For the remainder, this was a new change after the Games.

Whilst there is some evidence of a Games effect leading to increased working from home, the evidence suggests that the impact of normal 'churn' on other travel patterns – time, mode and route choice – is greater than the influence of the Games. Figure 8.2 shows the changes made to the time, route and mode of commuter journeys compared to before the Games. In each case, it is clear that a higher proportion of commuters have made a new change since the Games than made a change during the Games which they then sustained.

Figure 8.2 Change in patterns of working from home or from a location other than the normal workplace, before and after the Games.



Source: TfL Personal Travel Panel Survey

Base: 1,208 re-time (outward journey), 1,205 re-time (homebound journey), 1,209 re-route, 1,201 re-mode (wave 3)

Longer term benefits of the Games

Longer term benefits of the Games for travel behaviour

London travellers were asked what benefits they had gained from their experiences during the Games, in terms of their future travel behaviour. For most, it is clear that the Games was a short-term one-off event, and did not have a significant bearing on their normal choices. Many were not able to identify any long term benefits of the changes made.

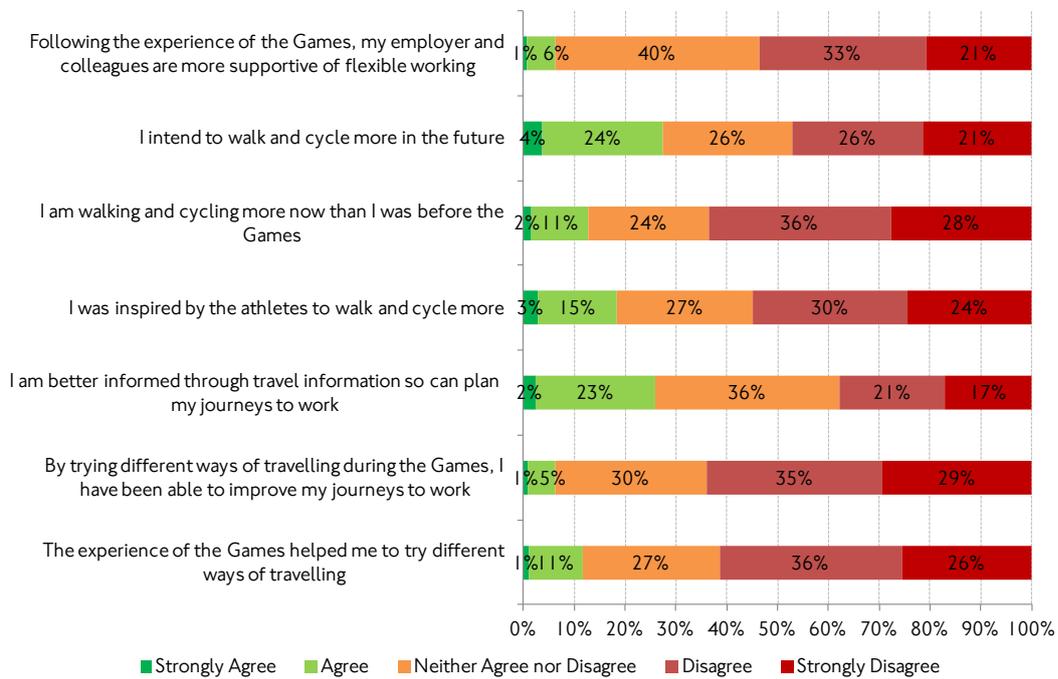
Amongst commuters, the most significant benefits identified were that around a quarter were now intending to walk and cycle more (26 per cent, 7 per cent were already doing so) and a similar proportion said that they were better informed to be able to plan their journeys to work (25 per cent). Very few said that the experience of the Games had enabled them to improve their journeys to work (6 per cent).

Business travellers also found it difficult to identify any longer-term benefits. Again, the most common response was that they were better informed to be able to plan their business journeys (30 per cent). Just over one in ten said that the Games had helped them try alternatives to travelling, such as telephone or video conferencing. As described earlier in this report, the short duration of the Games meant that most business travellers were able to postpone their journeys and did not need to find an alternative.

Leisure travellers were somewhat more able to identify longer-term benefits of the changes they had made during the Games. A third felt better informed to be able to plan their business journeys (34 per cent), and 29 per cent were intending to walk and cycle more. One in six said that they were already walking and cycling more and 12 per cent felt that the

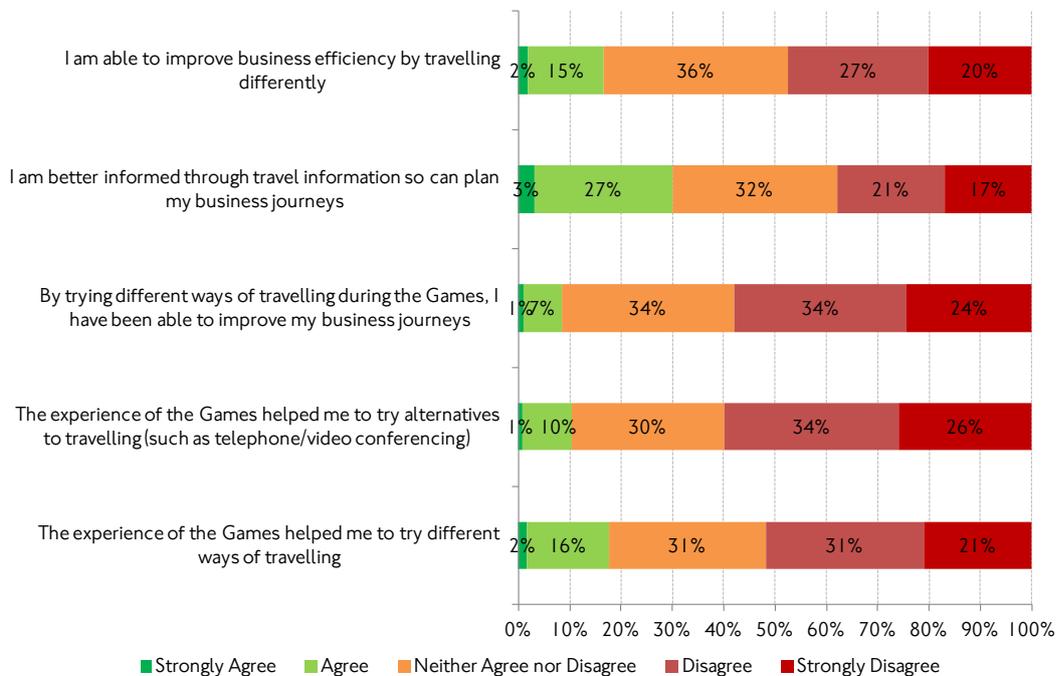
experience of the Games had enabled them to improve their journeys for shopping, leisure and other purposes.

Figure 8.3 Benefits identified by commuters.



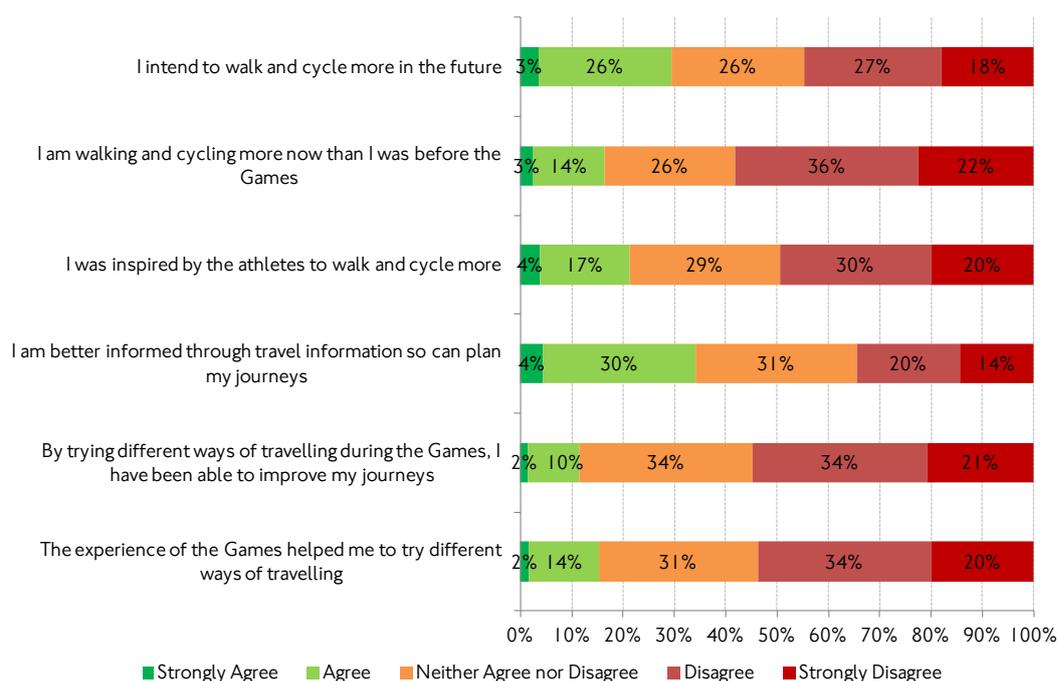
Source: TfL Personal Travel Panel Survey
Base: 1,200 respondents (wave 3)

Figure 8.4 Benefits identified by those travelling for business purposes.



Source: TfL Personal Travel Panel Survey
Base: 668 respondents (wave 3)

Figure 8.5 Benefits identified by those travelling for shopping, leisure and other purposes.



Source: TfL Personal Travel Panel Survey
 Base: 1,652 respondents (wave 3)

Impact of Games experiences on future travel behaviour change

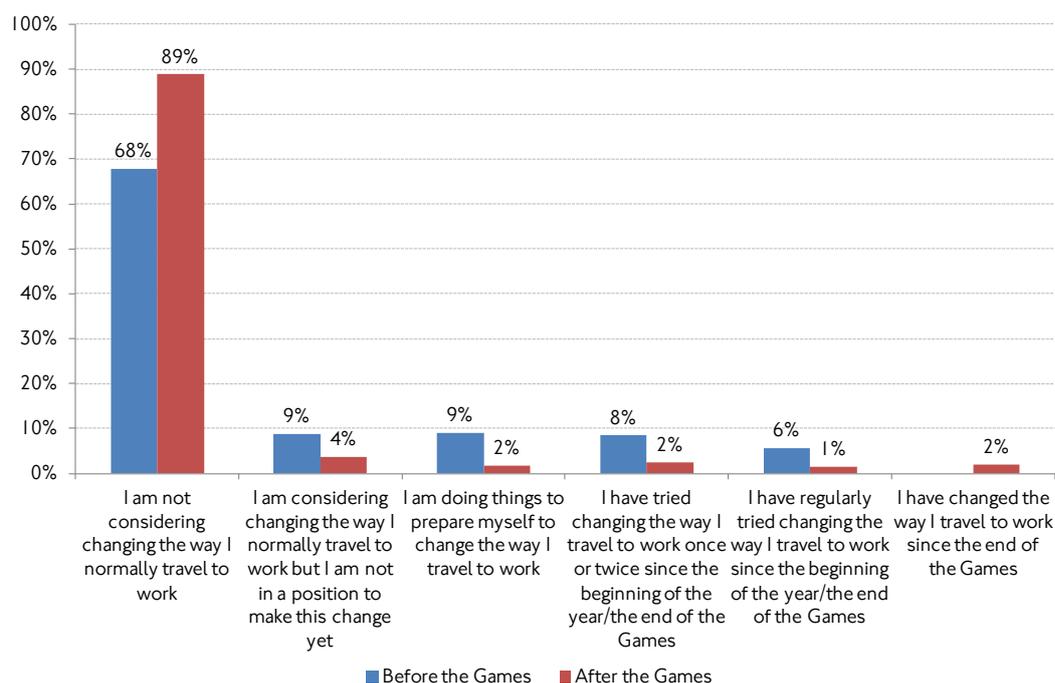
Impact of the Games on attitudes to behaviour change

London commuters were asked before the Games the extent to which they were considering changing their journey to work in normal conditions (not during the Games). 68 per cent said that they were not considering change at all, 18 per cent that they were considering or preparing to change, and 14 per cent that they had tried out changing their travel since the start of the year.

The same question was asked of London commuters after the Games. It was thought that the experience of travel behaviour change during the Games might encourage some commuters to make a more permanent change, or make commuters more amenable to change in future. In fact, as shown in Figure 8.6, after the Games a far larger proportion said that they were not considering changing their journey to work – 89 per cent compared to 68 per cent before the Games.

In total, two thirds gave the same response before and after the Games, 27 per cent were less likely to make a change than before the Games and just 7 per cent were more likely to make a change.

Figure 8.6 Consideration of change to normal commute journey, before and after the Games.



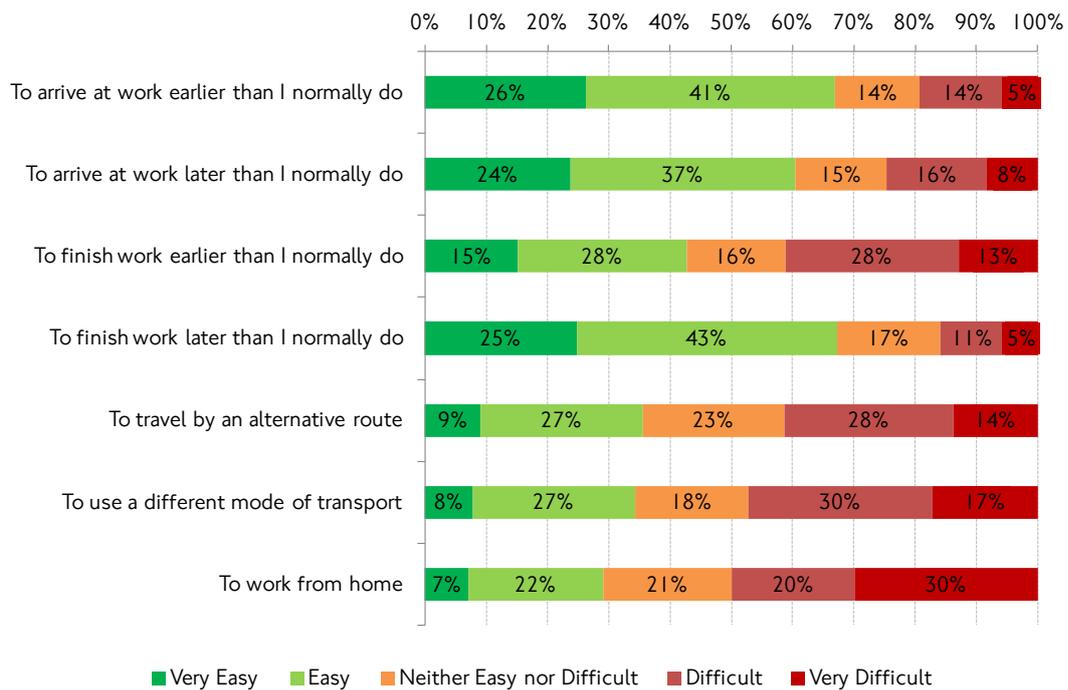
Source: TfL Personal Travel Panel Survey
 Base: 1,260 (wave 1) and 1,208 (wave 3) respondents

This may simply be reflect some confusion in the first wave between intent to change *during the Games* compared to in the longer term, and therefore that there was a greater consideration of change reported than normal. Other evidence suggests that the process of moving from the ‘considering change’ stage to an actual change is very slow unless prompted by an external trigger. It may be that the Games acted as this trigger for many of those who had been ‘considering change’ anyway, speeding up the process by prompting them to take the leap and try out that change. As we saw in Chapter 3, many of those who changed found the change to be less satisfactory than their normal journey. It may be therefore that the Games ‘cleared out’ the group of people who were considering change beforehand by encouraging them to test out that change. Some have sustained the change and made it permanent, whilst others may have tried out a new option and found it to be unsatisfactory.

Impact of the Games on attitudes towards the ease of behaviour change

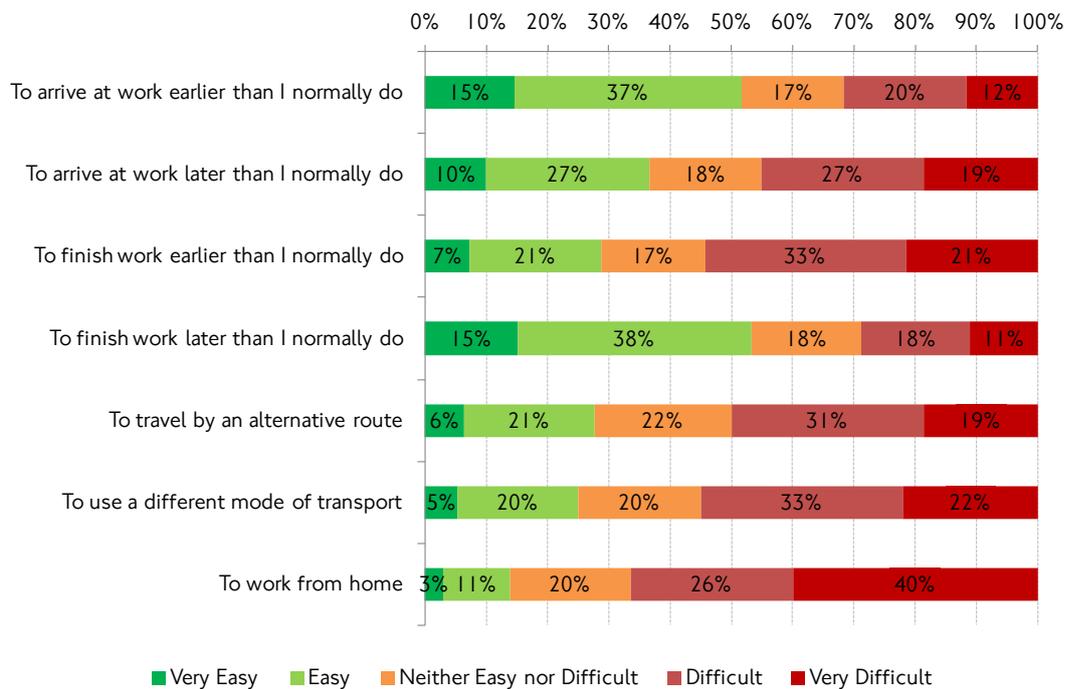
After the Games, London commuters were asked how easy they thought it would be to make temporary or permanent changes to their commute journeys, shown in Figures 8.7 and 8.8. In general, as one would expect, commuters thought it would be easier to make an occasional than a permanent change. The changes commuters thought would be easiest were arriving at work earlier and leaving later (67 per cent and 68 per cent respectively for an occasional change; 52 per cent and 53 per cent for a permanent change). Note that just because commuters think a change would be easy, does not mean they will make that change. It may be an easy but unattractive option. This is demonstrated by the fact that the easiest changes are those that essentially lengthen the working day; it is considered considerably harder to arrive later or finish earlier.

Figure 8.7 Ease of making an occasional change to commute journeys, by type of change.



Source: TfL Personal Travel Panel Survey
Base: 1,205 wave 3 respondents

Figure 8.8 Ease of making a permanent change to commute journeys, by type of change.

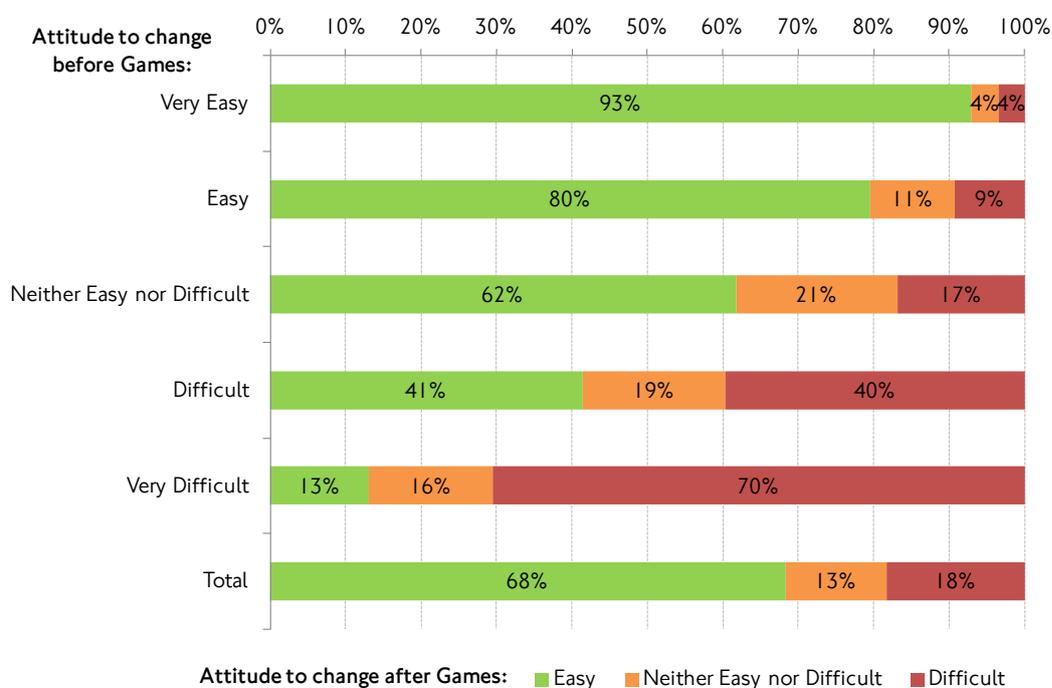


Source: TfL Personal Travel Panel Survey
Base: 1,178 wave 3 respondents

Before the Games, a similar series of questions were asked about the ease of change. Chapter 3 described how commuters who thought a change would be easier were more likely to make that change during the Games, as would be expected. The remainder of this section compares attitudes to the ease change before and after the Games, in order to assess whether there is any evidence that the experience of the Games has encouraged commuters to feel that change is easier, having tested different options for their journey.

Figure 8.9 compares attitudes towards the ease of arriving at work earlier before and after the Games. After the Games, 56 per cent of commuters thought this change would be easy to make occasionally and 21 per cent thought it would be difficult. In total, 42 per cent of people had not changed their view on how easy or difficult it would be after the Games; 37 per cent thought it would be easier than they had done before the Games; and 21 per cent thought it would be harder. This was one of the changes commuters thought would be the easiest to make.

Figure 8.9 Comparison of attitudes towards the ease of arriving at work earlier occasionally, London commuters, before and after the Games.



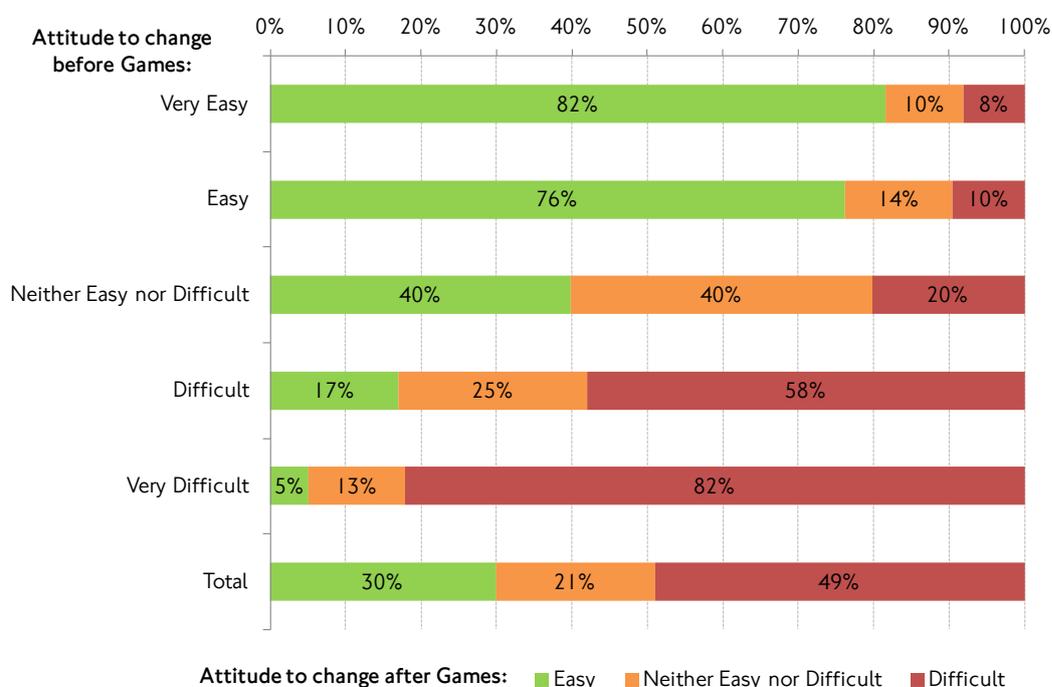
Source: TfL Personal Travel Panel Survey
Base: 857 respondents (wave 1 and 3)

Comparing attitudes towards the ease of changing route, after the Games, 35 per cent of commuters thought this change would be easy to make occasionally and 37 per cent thought it would be difficult. In total, 38 per cent of people had not changed their view on how easy or difficult it would be after the Games; 33 per cent thought it would be easier than they had done before the Games; and 29 per cent thought it would be harder.

Comparing attitudes towards the ease of changing mode, after the Games, 31 per cent of commuters thought this change would be easy to make occasionally and 45 per cent thought it would be difficult. In total, 40 per cent of people had not changed their view on how easy or difficult it would be after the Games; 33 per cent thought it would be easier than they had done before the Games; and 27 per cent thought it would be harder.

Figure 8.10 compares attitudes towards the ease of working from home occasionally before and after the Games. After the Games, 21 per cent of commuters thought this change would be easy to make occasionally and 58 per cent thought it would be difficult. In total, 50 per cent of people had not changed their view on how easy or difficult it would be after the Games; 35 per cent thought it would be easier than they had done before the Games; and 15 per cent thought it would be harder. This was the change that commuters thought it would be hardest to make, on average.

Figure 8.10 Comparison of attitudes towards the ease of working from home occasionally, London commuters, before and after the Games.



Source: TfL Personal Travel Panel Survey
Base: 847 respondents (wave 1 and 3)

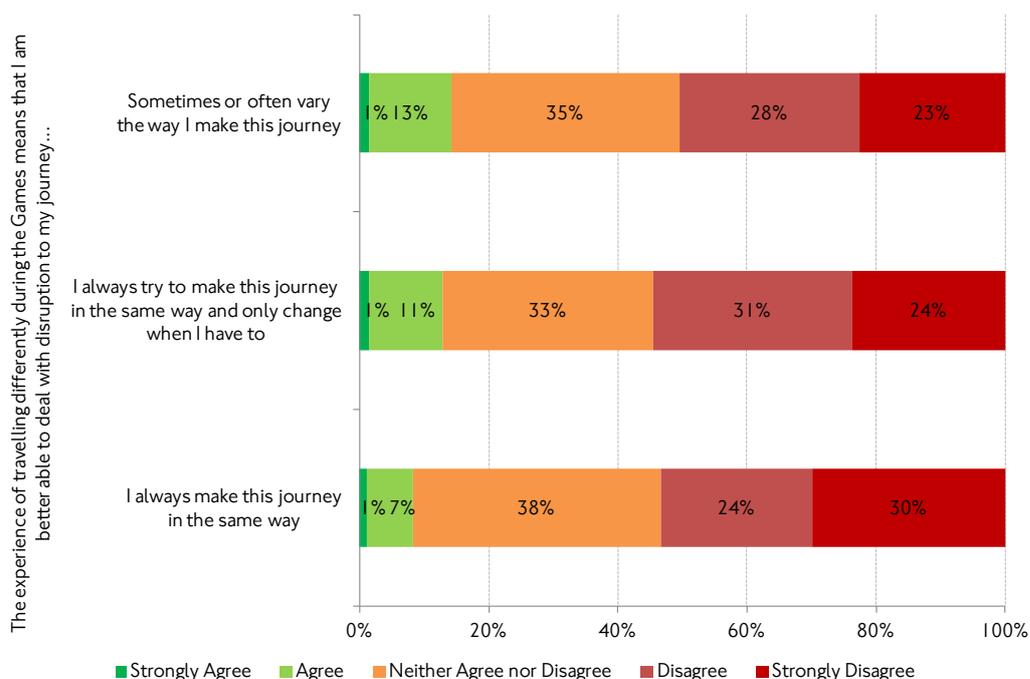
Impact of Games experiences on resilience to disruption

Longer term benefits of the Games for coping with disruption

Between one in six and one in seven London travellers considered that their experiences during the games had made them better able to deal with disruption to their journeys in future – 14 per cent of commuters, 15 per cent of business travellers and 18 per cent of those travelling for other purposes. Interestingly, although we might expect that those who always make their journey in the same way had the most to gain in terms of learning about other options, Figure 8.11 shows that in fact those who said before the Games that they

sometimes or often vary their journey were more likely to agree that the Games had made them more resilient to disruption than those who said they always make their journey in the same way (14 per cent compared to 8 per cent). This may reflect the fact that those who always make their journey in the same way were less likely to make a change, or that they genuinely have fewer options available to them in the event of disruption.

Figure 8.11 Benefits identified by London commuters in terms of being better able to cope with future disruption, by experience of varying journey to work before the Games.



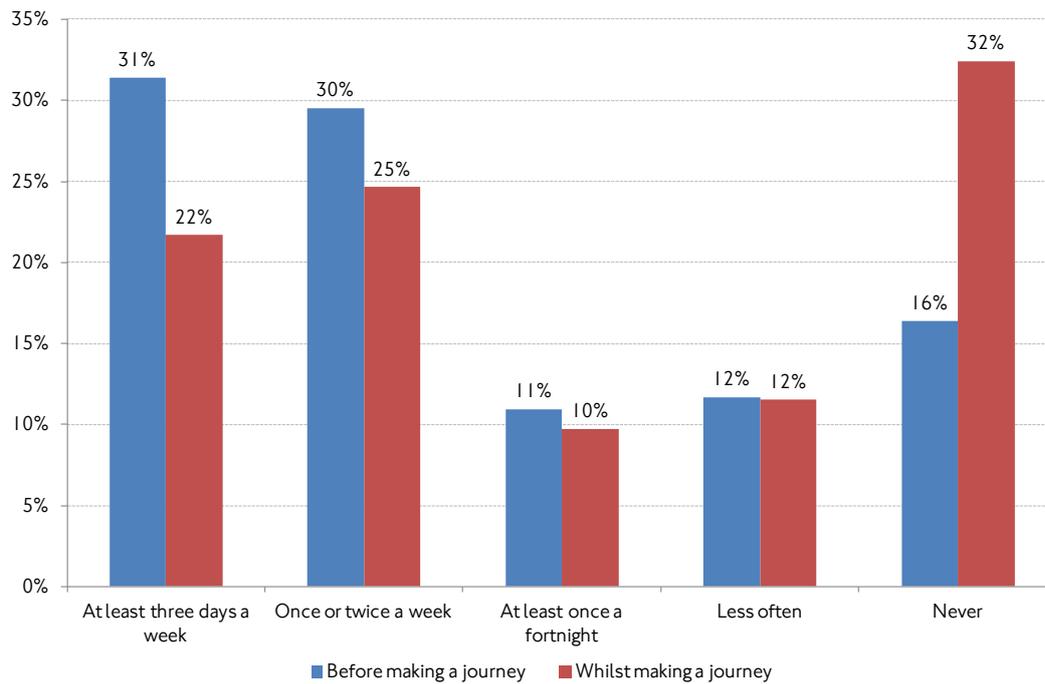
Source: TfL Personal Travel Panel Survey
Base: 1,260 (wave 1) and 1,208 (wave 3) respondents

Impact of the Games on whether use available tools to check for disruption

London travellers were asked whether they have used the tools available to check for disruption before their journey or whilst travelling since the Games. In total, 84 per cent said that they had checked for disruption before making a journey and 68 per cent that they had done so whilst travelling, as shown in Figure 8.12. Many London travellers check for disruption frequently, with 61 per cent checking before travelling at least once a week.

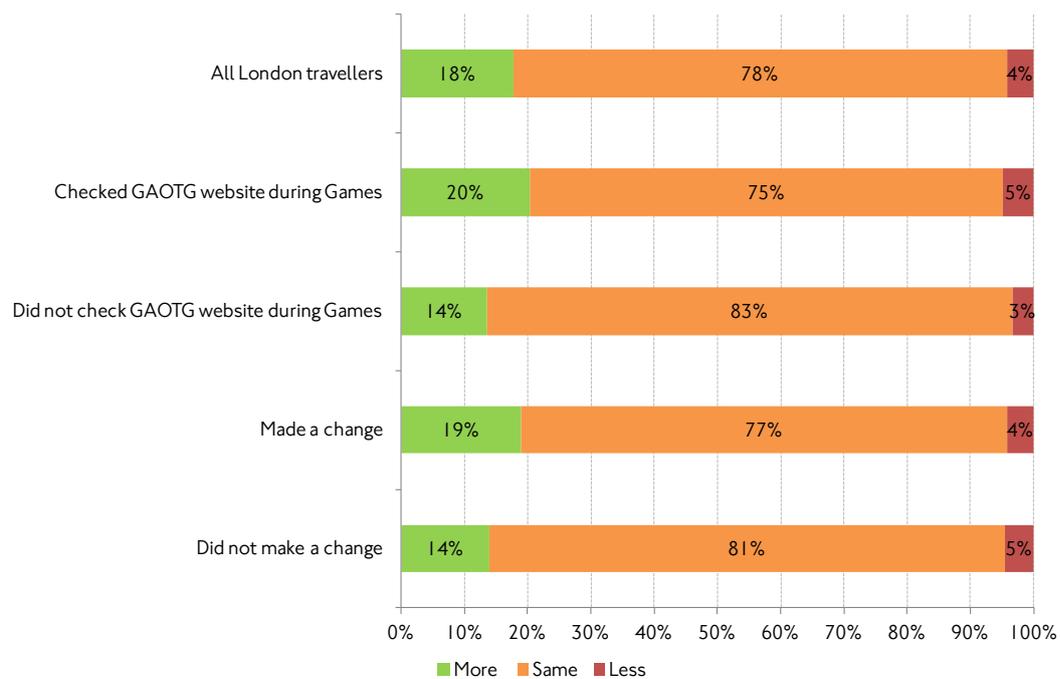
In total, 18 per cent of London travellers said that they were checking for travel disruption more than they had done before the Games, compared to only 4 per cent who were checking less often. Those who had made a change to their journey during the Games or who had made use of the Get Ahead of the Games website to plan their journeys during the Games were more likely to say that they had increased the frequency with which they check for disruption, as shown in Figure 8.13.

Figure 8.12 Frequency of checking for disruption before making a journey and whilst travelling, since the Games.



Source: TfL Personal Travel Panel Survey
 Base: 1,260 (wave 1) and 1,208 (wave 3) respondents

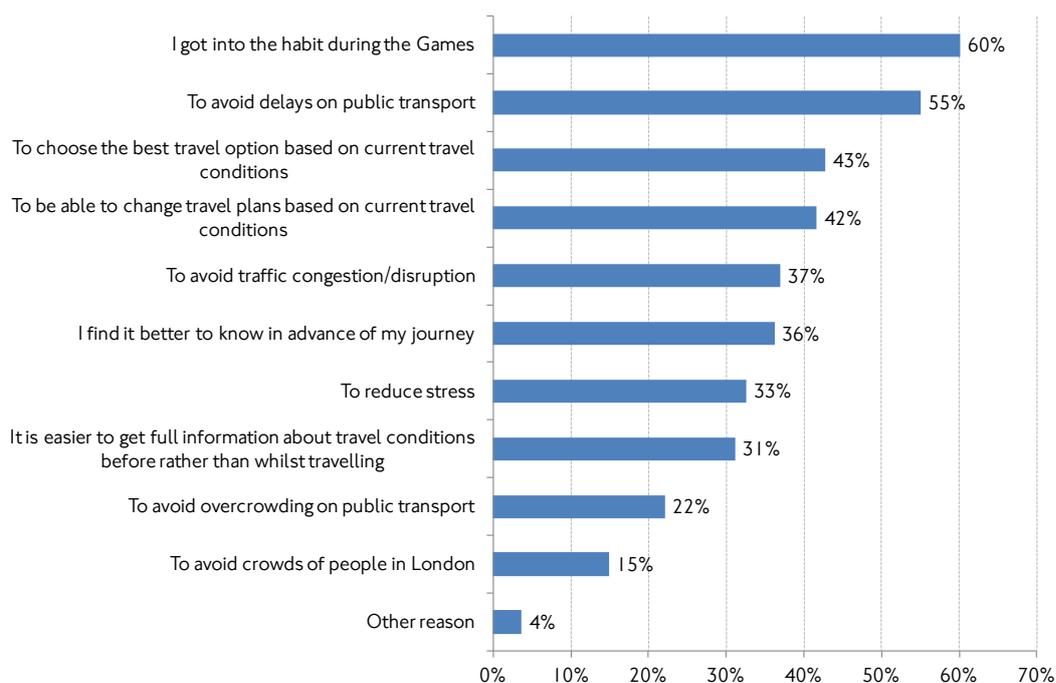
Figure 8.13 Whether check for disruption more, less or the same amount since the Games, by whether made a change to journeys during the Games and whether used Get Ahead of the Games website during the Games.



Source: TfL Personal Travel Panel Survey
 Base: 1,260 (wave 1) and 1,208 (wave 3) respondents

There is clear evidence of a Games impact, with 60 per cent of those who are checking for disruption more often since the Games saying that this was because they got into the habit during the Games. Other reasons, shown in Figure 8.14, were to avoid delays on public transport (55 per cent), to choose the best options based on current conditions (43 per cent) and to be able to change travel plans based on current conditions (42 per cent). 66 people had reduced the amount they check for travel disruption since the Games, mainly because they had only felt the need to do so during the Games (50 per cent).

Figure 8.14 Reasons given for checking for disruption more often since the Games.



Source: TfL Personal Travel Panel Survey
Base: 276 wave 3 respondents

Impact of the Games on how London travellers would respond to disruption

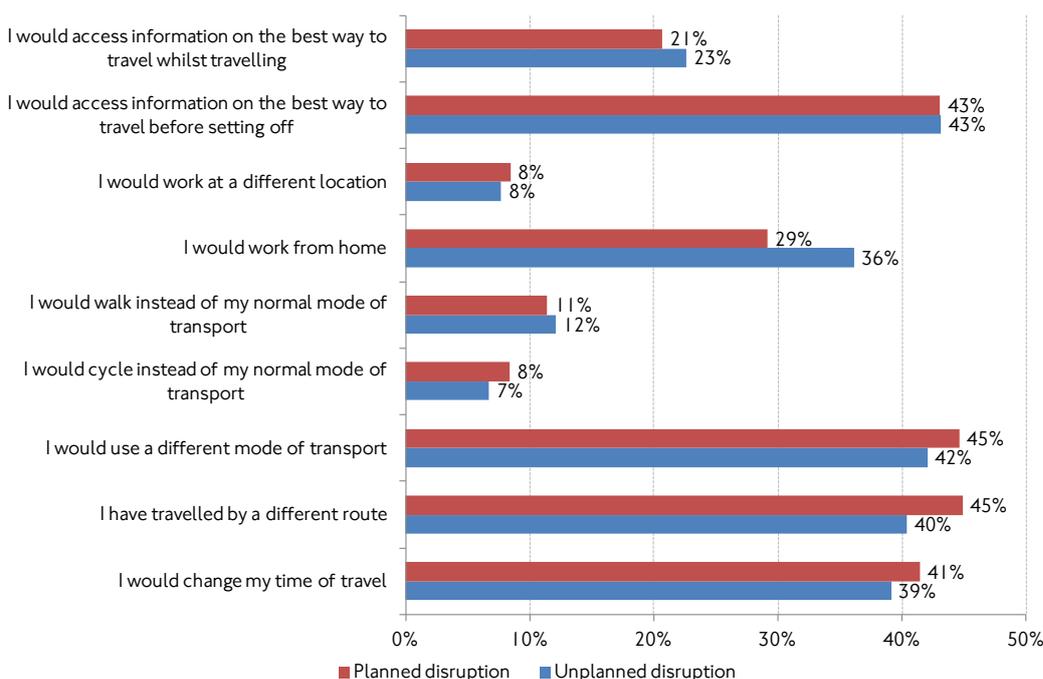
London travellers were asked after the Games what they would be most likely to do in response to both an unexpected major disruptions and delays on their normal route to work in the next four weeks, and an expected major disruption or delay on their normal route to work in the next six months. Responses were very similar to both types of delay, with 84 per cent choosing to make at least one change to their journey, 5 per cent saying that although they would not plan to make a change, they would access information whilst travelling or before setting off, and 11 per cent saying that they would not make any changes and would travel as normal.

It is difficult to draw a firm conclusion, as not exactly the same questions were asked before and after the Games, but it does appear that London travellers may be somewhat more prepared to change their journey in the event of disruption after the Games than before. Before the Games, a quarter of London commuters said that they always make their journey in the same way, 45 per cent that they tried to make the journey in the same way everyday, and only make changes when they have to and 30 per cent that they sometimes or often varied the way they make their journey. So, the proportion of travellers who would not make

any changes in the event of disruption appears to have fallen from a quarter to just over one in ten.

Figure 8.15 shows the types of changes London travellers would be most likely to make. The most popular changes were to use a different mode or route, or to change the time of journeys. On the whole, responses were very similar to unexpected and planned disruption, but it is noticeable that travellers are more likely to work from home in response to planned disruption (36 per cent compared to 29 per cent). This may be because working from home is more feasible or acceptable with employers if it can be planned in advance.

Figure 8.15 What London travellers would be most likely to do in response to disruption.

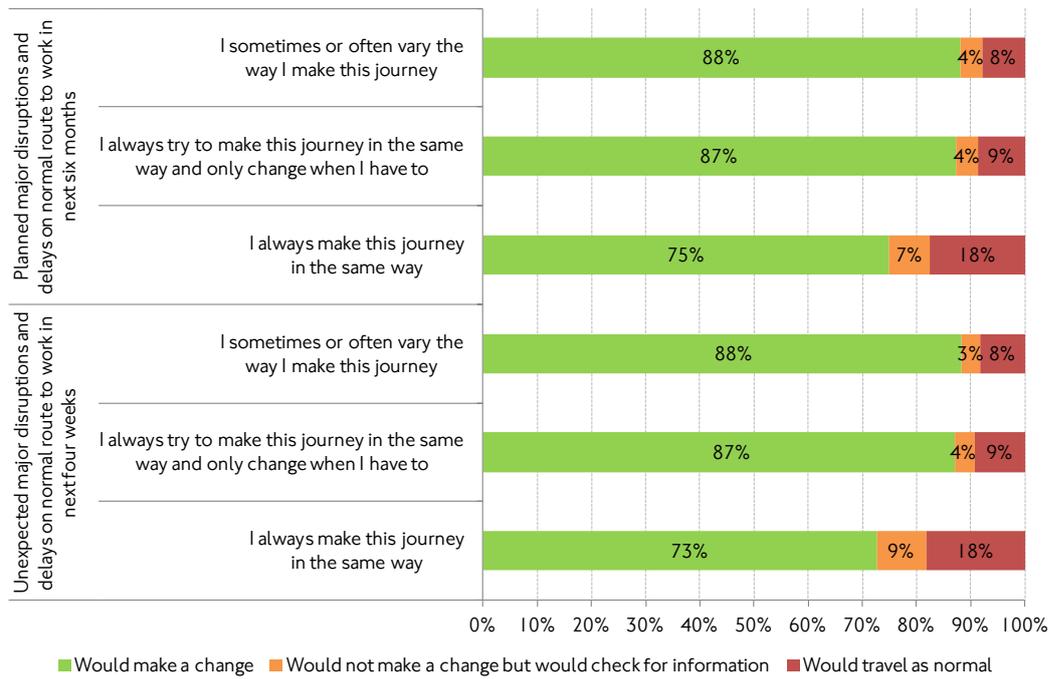


Source: TfL Personal Travel Panel Survey
 Base: 1,516 respondents (wave 3)

Responses were compared with how commuters had described their typical travel patterns prior to the Games, shown in Figure 8.16. Noticeably, the majority of respondents in all groups, including those who say they always make their journey in the same way, said that they would make some sort of change in response to disruption. However, those who said prior to the Games that they always make their journey in the same way were significantly more likely to say that they would not make a change or access information but would just make their journey as normal in the event of disruption – 18 per cent compared to 8 per cent of those who sometimes or often vary their journey and 9 per cent of those who only change their journey when they have to.

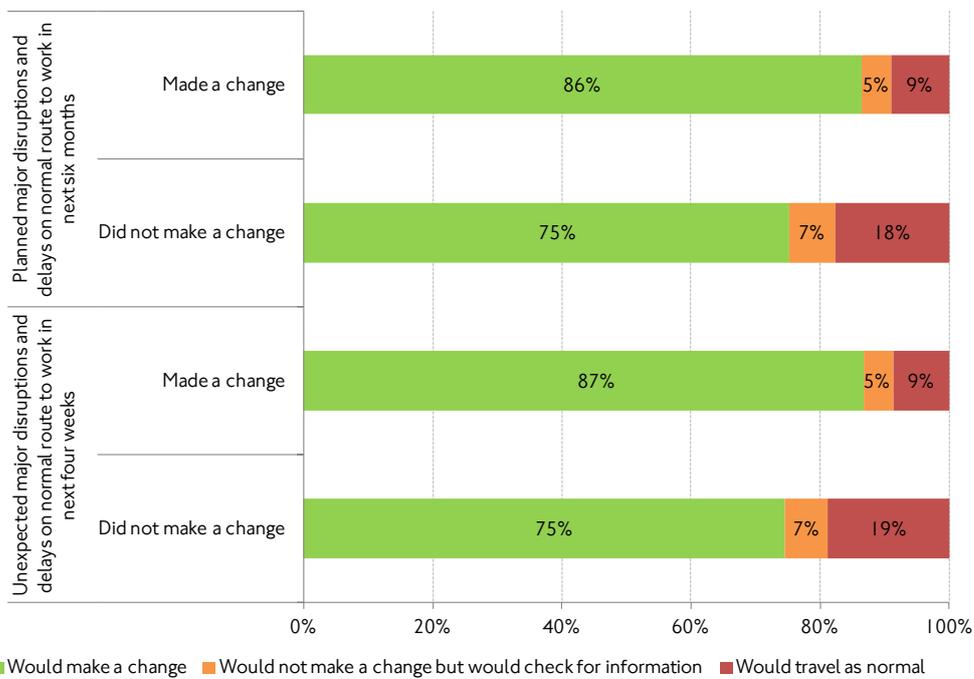
Responses were also compared with whether the traveller had changed their journey during the Games, shown in Figure 8.17. Those who had not changed their journey during the Games were twice as likely to say that they would not make a change or access information, but would travel as normal in the event of disruption.

Figure 8.16 Likely response to disruption by experience of varying journey to work before the Games, London commuters.



Source: TfL Personal Travel Panel Survey
Base: 1,230 (wave 1 and 3) respondents

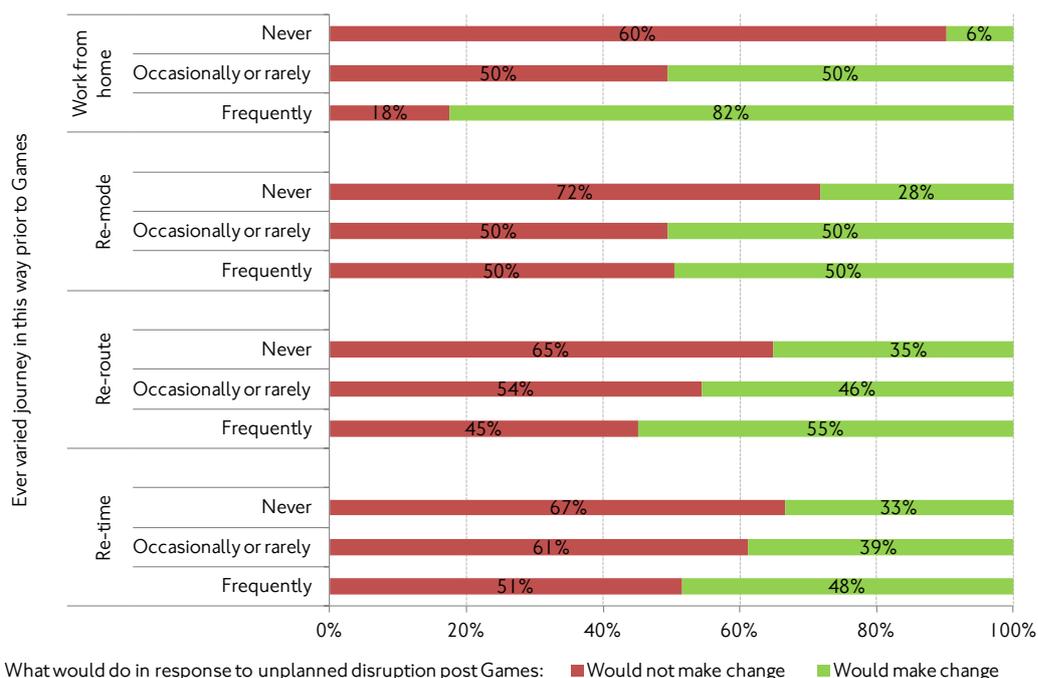
Figure 8.17 Likely response to disruption by whether made a change to their journeys during the Games.



Source: TfL Personal Travel Panel Survey
Base: 1,170 (wave 1 and 3) respondents

Finally, responses were compared with whether commuters had reported ever making this change to their journey prior to the Games, shown in Figure 8.18. Those who said that they never made each particular type of change were less likely to say that they would make such a change in future. The difference was particularly stark for working from home, where just 3 per cent of those who previously never worked from home said that they would do so in the face of disruption, compared to 82 per cent of those who previously worked from home frequently.

Figure 8.18 Likely response to disruption, by type of change and whether ever varied commute journey in this way prior to the Games.



Source: TfL Personal Travel Panel Survey
 Base: 881 (re-route), 900 (re-mode), 852 (re-time) and 884 (work from home) respondents, wave 3

Conclusion – Long term change

Churn or change?

Although at an aggregate level, travel patterns change very slowly, this conceals considerable ‘churn’ in the travel of individuals. This reflects changes in the personal and working lives of those travelling in London; for example, over the relatively short period of time covered by the Olympic research programme, nearly one in ten respondents changed their working status. Others will have moved job or home, or experienced other changes that affect their travel choices, such as a change in responsibilities at work.

This churn is evident when we look at the changes made by our sample of London travellers. Although the majority of respondents changed their travel during the Games, most returned to their normal habits once the Games were over. Some did sustain the change they had made, largely, as we saw previously, because they found it to be better in some way than their previous choice. But at the same time, in the period after the Games, other travellers were making changes to their travel unrelated to their experiences during the Games.

In terms of changes to the time, route and mode of journeys, the changes made as a result of Games experiences have been largely eclipsed by the normal churn in choices that has taken place in the intervening months, with more people having made a change unrelated to the Games than a Games-related change.

The exceptions to this appear to be where a trend existed prior to the Games, such as a trend towards increased cycle travel or working from home. Here, it appears that the TDM activity may have acted as an additional trigger for longer term change.

Longer term benefits of the Games

Essentially, London travellers saw the Games as a one-off event with no lasting impact. They were satisfied with the performance of the transport network and that they had been provided with appropriate support, but they did not expect to benefit in the longer term. Despite this, some benefits have emerged:

- There is evidence that, having got into the habit during the Games, London travellers are more likely to use the tools available to check for disruption before making a journey and whilst travelling;
- It also appears that London travellers think change would be easier, although there is no evidence of a greater intent to change (and, if anything, evidence that the reverse is true);
- Some businesses reported that they now have plans or systems in place that will help them cope better with future disruption; and
- Around one in six London travellers thought that their experience during the Games had made them better able to deal with disruption, and there was some evidence that commuters were more likely to change their journey in response to disruption than before the Games.

9. Conclusion

The reduction in travel demand during the Games was delivered by a lot of people making a modest change – this requires high levels of engagement amongst the target population

In order to deliver a relatively modest change in overall background demand, a large number of people made changes to their travel patterns. The level of mass engagement required to deliver this change was possible due to the high profile of the event, and would be difficult to replicate in other circumstances. However, we can see how change varied considerably at a local level depending on both the anticipated impact of the Games and the level of engagement of people and businesses, with Canary Wharf providing the best example of a highly localised pattern of change driven by strong engagement. This perhaps provides a more relevant example for future planning, and shows that substantial change can be achieved at a local level where there is a strong motivation to act.

The type of changes made reflected the circumstances of the journey – business journeys were postponed and leisure activities adapted, whilst commuters were more likely to continue to travel but change their journey in some way. Over a longer period, it is more likely that the choices for different journey purposes would converge, although the more discretionary a journey, the more likely it is to simply be abandoned in the face of adversity.

The key reason that individuals and businesses changed their travel was that they believed the consequences of not changing were worse than the inconvenience of making a change – the message of the campaign was relevant, helpful and plausible

It is clear that the drivers of change were largely in response to the temporary conditions created by the Games: a more challenging travel environment, an acceptance that normal working patterns would need to be relaxed somewhat, and the Games taking over from normal leisure activities. There is no significant evidence that the Games prompted people to make changes they were considering anyway.

It is reasonable to conclude that the change would not have taken place to the same extent without TDM – those who were aware of the GAOTG campaign and tools were more likely to change. Businesses used the information provided by TfL to get senior level buy-in and allocate resources. The awareness of and engagement with the campaign undoubtedly contributed to the preparedness of London travellers for the Games, and the level of change in travel behaviour seen throughout.

The plausibility of the message was important – the worse people believed conditions would be, the more likely they were to plan to change. London commuters especially are experts in their journeys and filtered the information provided through a ‘sense check’, ignoring anything they did not find plausible.

Some people are more amenable to change than others, so for future TDM activity it would be worthwhile to devote resources to understanding the target population in order to maximise the effectiveness of the campaign and set realistic aspirations

Some people are more amenable to change than others – having a positive attitude to change and prior experience of varying their journey made it more likely that someone would change. Nevertheless, the Games demonstrated that some incidents are significant enough to create change even amongst those most reluctant to do so. We can expect that in future, Travel

Demand Management programmes will be more effective with populations more amenable to change, but that a wider group can be engaged where there is a very substantial change to network supply or demand anticipated.

Employers have a significant influence and engagement with businesses can deliver more behaviour change than engaging only with individuals

Employers have a major influence on the travel of their employees – people whose employers had provided advice were more likely to change. In particular, it is only through the actions of employers that employees can reduce or significantly re-time their journeys. Providing tailored support and framing messages in terms of business continuity and risk (or, where relevant, maximising business opportunity) are vital to success in engaging with businesses and thus delivering a change in commute and business travel.

Change will only be sustained where a better option is revealed – most frequent travellers are already aware of the options available to them and are satisfied with their choice, and much of the change that emerged simply became part of the normal and constant ‘churn’

For individual travellers and businesses, the motivation for change is the expected impact on them, and they will revert back to normal once the risk has passed. The only reason to sustain change was where it had revealed a better option, and this was only the case in a minority of cases. It was more common for those travelling for shopping, leisure and other purposes to have found a better option and sustained a change – this may be because travellers are less likely to have explored all the available options for journeys made more infrequently.

Although at an aggregate level travel patterns change very slowly, this conceals considerable churn at the individual level. On the whole, although some change was sustained as a result of the Games, it appears that the long term impact of the Games was less significant than the impact of all the other factors - changes to people’s personal and work circumstances and priorities - that caused travel behaviour to change over the same period.

The exceptions to this appear to be where a trend existed prior to the Games, such as a trend towards increased cycle travel or working from home. Here, it appears that the TDM activity may have acted as an additional trigger for longer term change.

It appears that the Games experience has provided London travellers and businesses with the tools they need to help them cope with disruption, making them more resilient in future

Essentially, London travellers saw the Games as a one-off event with no lasting impact. They were satisfied with the performance of the transport network and that they had been provided with appropriate support, but they did not expect to benefit in the longer term. Despite this, some benefits have emerged:

- There is evidence that, having got into the habit during the Games, London travellers are now more likely to use the tools available to check for disruption before making a journey and whilst travelling;

- It also appears that London travellers think change would be easier, although there is no evidence of a greater intent to change (and, if anything, evidence that the reverse is true);
- Some businesses reported that they now have plans or systems in place that will help them cope better with future disruption; and
- Around one in six London travellers thought that their experience during the Games had made them better able to deal with disruption, and there was some evidence that commuters were more likely to change their journey in response to disruption than before the Games.

The TDM approach used for the Games can be usefully applied to situations where travellers face a major change to network supply or demand, such as a line or station upgrade or a major event

It appears that most London travellers are satisfied with their current choices and feel that these choices meet their needs. Nevertheless, it also appears that TDM activity can be effective and useful where travellers face a major change to their available options, and where TDM messages can present a believable story about the likely impact of this change, and offer realistic alternatives. The more bespoke the message, the more effective it is likely to be. Thus, there is much to be learned from the Games-time interventions in planning for major events and other causes of disruption, such as rail or road works, in future.