

EXECUTIVE SUMMARY

The Second Road User Satisfaction Survey (2007) is the second round of state level survey commissioned by the Tamil Nadu Road Sector Project to track awareness of the road users regarding the road development activities and their satisfaction with the services.

This report gives the main findings of the Round 2 survey and makes comparisons with the Round 1 survey conducted in 2005, where appropriate. It is structured according to the main themes addressed by the study.

OBJECTIVES OF THE SURVEY

The specific objectives of the Second Road User Satisfaction Survey are as follows:

- To elicit views on public perception of current sector outcomes, Highway Department's performance and government policies.
- To document the views in a comprehensible format suitable for comparison overtime and
- To present the findings of the survey to senior decision-makers in Government of Tamil Nadu and the general public.

METHODOLOGY

The study comprises of both qualitative and quantitative methods. The quantitative method consists of a large scale survey among the general population (sample=7855) and the qualitative method comprised of road user and stakeholder groups through in-depth interviews to elicit views and opinions on specific concerns related to road safety and policies (sample=40). The data collection for the study collected between May and June 2007.

TARGET GROUP

In the quantitative phase, three types of target groups are covered namely Main Users, Vulnerable Users and School Students.

- The main users comprised of truck/tanker drivers, private bus drivers, state transport drivers, taxi drivers, hired car/travels drivers, wagon drivers, auto rickshaw drivers, private car drivers, college bus drivers, ambulance drivers, BPO/call center drivers, owner driven card, owner driven two-wheelers, farmers/agricultural commodity producers, public transport commuters and tourists.
- The vulnerable users comprise households adjacent to main roads, bullock cart riders, pedestrians and cyclists.

- The school students comprised of both boys and girls going to Govt. and private schools and aged between 12 to 18 years

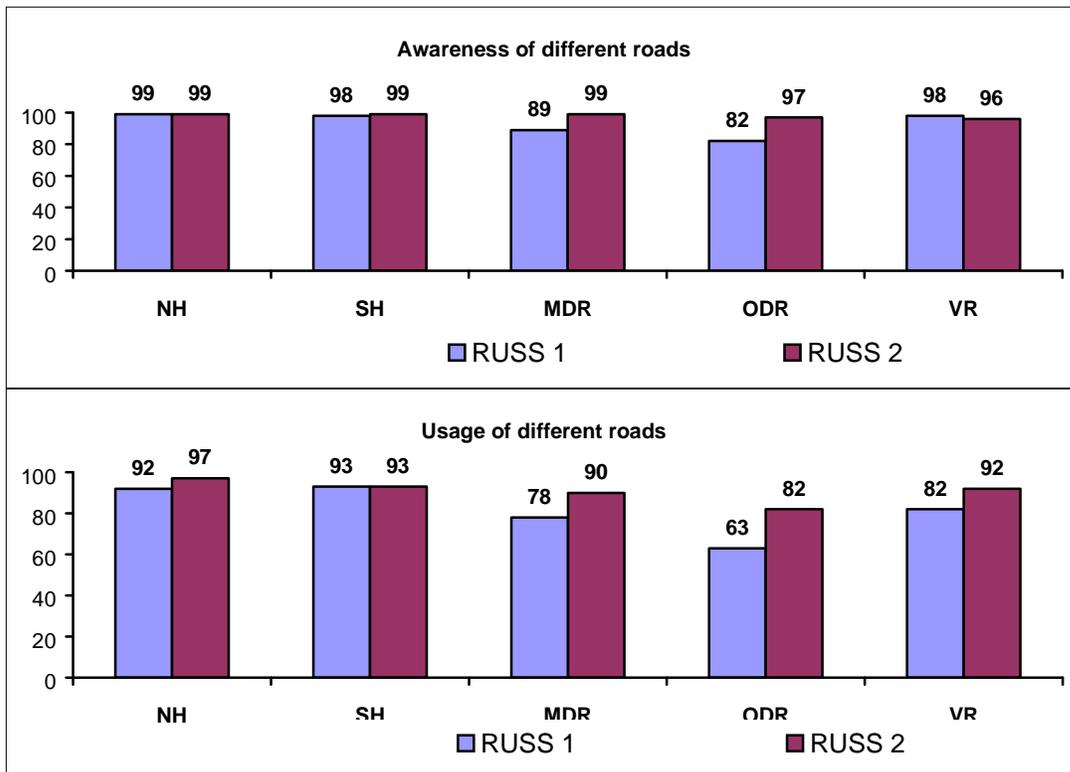
SALIENT FINDINGS

Profile of the road users

- The mean age of the road users is 36 years in case of men and 35 years in case of women.
- Almost all the road users are literates with majority completing 9 years of schooling.
- Ownership of television is almost universal and more than three-fifth (66%) reported to own radio. The habit of watching television is reported by 97% of users while 87% reported habit of listening to radio. Perhaps these media can be used in communicating messages on road safety.

Awareness and use of different roads among road users

While the awareness of NH has remained the same (99%) in both the rounds, there is a marginal increase in the awareness of the SH (98% to 99%) and a marginal decrease in case of VR (98% to 96%) since Round 1. The awareness of MDR and ODR increased by about 10% and 15% respectively since Round 1. The percentage of road users has also increased in case of NH (92% to 97%), MDR (78% to 90%), ODR (63% to 82%) and VR (82% to 92%) but it remains same as in Round 1 in case of SH (93%).



Amenities/ facilities used on the road

The survey provides some insight into the experience of traveling on different roads:

- More than four-fifth (83%) of the main users stated that the recent trip had been a familiar trip and 17% stated that it was a new trip.
- Round 2 as well as 1 indicate that more men than women undertake business/ work related trips while more women than men undertake recreational/ leisure trips.
- Majority of the road users stopped to have tea/coffee, followed by food. Parking facilities were also used by the road users.
- In Round 2 as well as 1, amenities/ facilities were used mostly on the NH.
- Tea/Coffee, eating food/drinks at restaurant/ shop, using public toilets and PCO are the main amenities/ facilities used by the road users both in Round 2 and 1.
- On the NH, majority (43%) of the users reported to have noticed the ambulance stationed for emergency services followed by the presence of hospitals (28%).

Journey characteristics

- Compared to Round 1, there is an increase on percentage of road users in Round 2 who feel 'unsafe to a great extent' on the different roads. Driver behavioural aspects emerge as a major concern for road users in both the rounds. In Round 2, the proportion of users concerned about high-speed traffic increased in case of all the roads.
- On the NH and SH, the major irritants include speed, rough driving, overtaking by other drivers and congestion/delay.
- Overall, bad driving is considered as the main reason for accidents on the road followed by bad roads.
- Driver's behaviour is considered as an important factor in road accidents. Rash driving, overtaking and speeding are critical factors to accidents. Wide and smooth roads like that on the NH lead to harsh driving and this was pointed out by various road users in the in-depth interviews.
- During the recent trip, majority of the road users experienced delay on the NH. More than three-fourth stated that the delay lasted between 10 to 60 minutes.

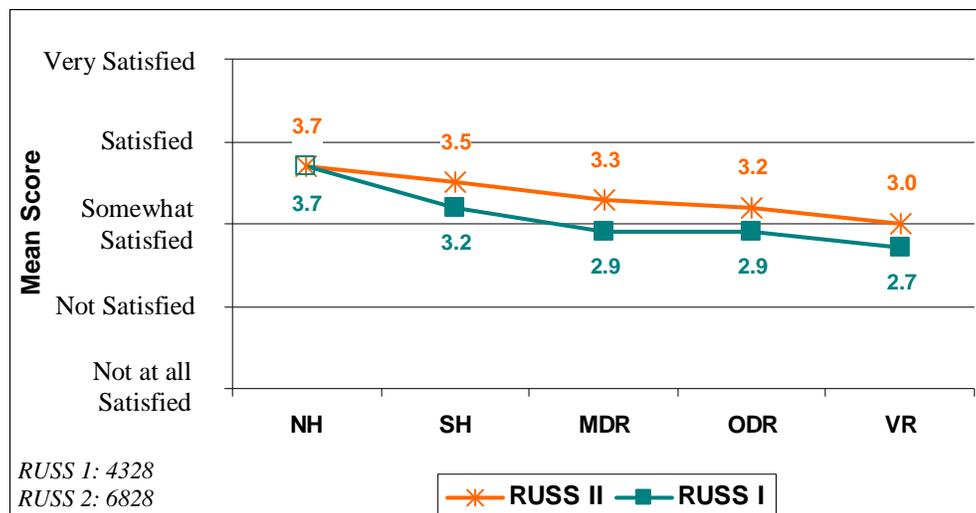
- Less than half (47%) of the main users and about one-third (34%) of the vulnerable users noticed road works during the recent journey and majority of the road works were on the NH.
- Majority of the business travelers feel irritated whenever they encounter problems such as those listed below.
 - a) Unreliable journey times
 - b) Long journey times
 - c) Congestion
 - d) Road works
 - e) General delay
 - f) Safety

These problems also affect the organisation as it becomes difficult for them to plan/ estimate journey (15%) and it costs money (13%).

- Overall, about two-fifth (39%) of the car drivers wear seat belts and majority (90%) have driving license. Among the owner driven cars, more women than men wear seat belts while driving. Among the car drivers, only a few BPO/Call center and Taxi drivers wear seat belt.
- Knowledge on road signs found within the city/town limits is higher (about 70 %) among the road users but knowledge on road signs found on highways such as ‘slippery road’ (20%) and ‘cross roads’ (53%) seems to be comparatively low across all the road users.

Satisfaction levels on roads used mostly

- While the level of satisfaction in case of the NH users remains close to ‘satisfied’ in both the rounds, there is a marginal increase in the satisfaction levels among the users of SH, MDR, ODR and VR since Round 1 on a 5 point scale where 5 means ‘very satisfied’ and 1 means ‘not at all satisfied’.



- Majority of the respondents (84%) agreed that they needed more parking spaces and most of the road users (85%) reported in affirmative, on being asked if they are prepared to pay for parking within city/town.

Vulnerable users and school students

- It is alarming that as a pedestrian, majority of the vulnerable have the tendency to just cross the roads, without observing the rules/ regulations like crossing at Zebra Crossings, Traffic Signal points, in the presence of Traffic Police etc.
- Among the students who commute to school by walk, considerable number has reported using Zebra Crossing.
- Though the awareness of road safety measure is higher among the students who commute to school by two-wheeler, considerable number have crossing at wrong signal, reported traveling without valid document and license.

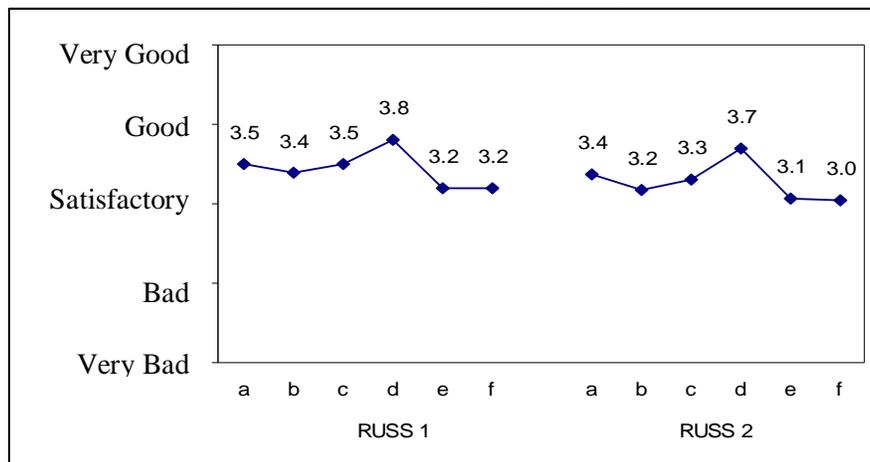
Awareness on the Highways Department

- Compared to Round 1, the awareness on road maintenance/ improvement schemes has increased especially with regard to schemes such as Golden Quadrilateral (39 to 43%) and the Tamil Nadu Road Sector Project (18 to 40%).

Performance of the Highways Department

On a 5 point scale where 5 means ‘very good’ and 1 means ‘very bad’, on being asked to rate the performance of highways department in terms of (a) maintenance of roads/ bridges, (b) dealing with public, (c) removing encroachments, (d) adding new capacities through road widening and bypasses, (e) disaster/ emergency management and (f) environmental management, a slight decline since Round 1 was reported. However, the performance of Highways Dept. was rated between ‘satisfactory’ and ‘good’ in Round 2 too.

Mean score on performance of highways department



Value for money in relation to the levied road tax and toll

- In Round 2, there is an increase in the percentage of road users (17% to 37%) who feel that there is high value for money in relation to tax by way of road infrastructure. However, the percentage of those who feel there is no value for money in relation to the levied road tax is also considerably higher (21%) when compared to Round 1.
- A similar trend is noticed among the road users with regard to value for money for the levied toll. While the proportion of those who feel there is high value increased (25% to 44%) from RUSS 1.