The voice of transport users

Value for money on London Overground – what passengers think

October 2014

London TravelWatch is the official body set up by Parliament to provide a voice for London's travelling public, including the users of all forms of public transport. We are supported by and accountable to the London Assembly.

Our approach

- We commission and carry out research, and evaluate and interpret the research carried out by others, to ensure that decisions on transport policy and operations are based on the best possible evidence
- We investigate complaints users have been unable to resolve with service providers – we get more than 6,000 enquiries a year from transport users and in 2013-14 we took 1,100 cases up with the transport operator because we agreed that the response the complainant had received to their original complaint was not satisfactory
- We monitor trends in service quality as part of our intelligence-led approach
- We regularly meet and seek to influence the relevant parts of the transport industry on all issues which affect the travelling public and work closely with a wide range of public interest organisations, user groups and research bodies to ensure we remain aware of their experiences and concerns
- We speak for passengers and the travelling public in discussions with opinion formers and decision makers at all levels, including the Mayor of London, the London Assembly, the Government, Parliament and local councils.

Our experience of using London's extensive public transport network, paying for our own travel, and seeing for ourselves what transport users go through, helps ensure we remain connected and up to date.

Our aim is to press in all that we do for a better travel experience for all those living, working or visiting London and its surrounding region.

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Foreword

London Overground has won many plaudits and awards since it began operating in 2007. This is the result of significant investment in rolling stock, stations, ticketing and staff training by Transport for London (TfL) and the concession operators LOROL. There has been a welcome emphasis on putting the passenger first which has resulted in more people choosing to use London Overground and in greater satisfaction amongst those who use it.

The results of this emphasis have been very clear. More people have chosen to use London Overground services and, amongst those that do, there has been a marked improvement in passenger satisfaction (as measured in the National Rail Passenger Survey [NRPS]). However, satisfaction with value for money on London Overground still lags behind similar scores for other TfL modes.

London TravelWatch's research in 2013[1] highlighted the fact that many passengers are faced with very tight financial constraints, with travel expenditure in many households exceeding what is spent on other essential services such as energy. So it is even more important that operators do what they can to give passengers better value for money. As part of its approach of continuous improvement TfL wanted further independent research to ascertain how London Overground could further improve its service to passengers.

This report was funded by TfL, but was overseen and prepared independently by London TravelWatch. It focuses on identifying how gaps in existing London Overground services could be improved. It also considers the wider opportunities to improve value for money features that will come with the expansion of London Overground to the West Anglia group of routes, and the creation of the new Crossrail concession in 2015.

Stephen Locke

Chair – London TravelWatch

[1] Value for money on London's transport services; what consumers think. 2013: www.londontravelwatch.org.uk/document/14387

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Introduction

In 2013, London TravelWatch carried out research to explore passenger attitudes to value for money, in order to identify the measures that transport operators need to take to improve perceived value for money on key modes of public transport in London.

TfL subsequently commissioned London TravelWatch to conduct further research focusing on surface rail services in and around London rather than other modes for which it is responsible. Specifically, the intention was to provide more detailed insights into passenger perceptions of the value for money offered by London Overground compared to other train operating companies (TOCs).

Evaluating London Overground against other TOCs is not a natural point of comparison for the majority of passengers. London Overground has a somewhat uncertain status as a service provider. Since it is easily recognisable as being part of the TfL family of brands, it is more readily compared by passengers to London Underground than other TOCs. In turn this sets higher expectations in terms of value for money and service delivery.

One key theme from the research was that, even where expectations arising from the comparison with London Underground are high, London Overground comes close to meeting these across many of the evaluation criteria that are important to passengers.

A second key theme relates to the confusion over the status of London Overground as a service provider. This means that positive value for money features were often not fully appreciated by consumers. For example, the frequency of services was considered by participants to exert a negative influence on the overall value for money equation, but this is only when it is being compared with London Underground rather than with TOCs.

Summary of recommendations

The research suggests a range of actions that TfL and London Overground could take to further improve the value for money they give to passengers:

1. **Improving awareness of what London Overground offers**

   - Establish local branding within London Overground to delineate different routes and to highlight the orbital nature of services provided, with line based sub-brands (similar to London Underground line names) to define local identity. This will help passengers discern whether their journey will be affected at times of disruption, and simplify journey planning.

2. **Making ticket buying easier**

   - Display comprehensive fare charts at each London Overground station
   - Better promote the availability of Railcard (Senior, 16-25 and Goldcard) discounts on Oyster
   - Upgrade London Overground ticket vending machines to allow direct purchase of tickets to London Underground and Docklands Light Railway stations so that passengers do not require detailed knowledge to get the right ticket
   - Upgrade the London Overground website to provide direct links to National Rail ticket sales and the Oyster top up facility
   - Consider giving passengers the ability to get an Oyster history summary from London Overground ticket machines as part of the process of letting a new concession for London Overground
   - Ensure that new ticket machines on the Crossrail concession include the ability to pay by cash.

3. **Improve the travelling experience**

   - Improve station and train accessibility by reducing the stepping gaps between trains and platforms; identifying low cost schemes to provide step free access at stations and better publicising stations which are already fully accessible
   - Invest in further gating schemes on the existing London Overground network and at all stations on the West Anglia route to reduce the likelihood of 'incomplete' journeys and improve passenger safety
   - Eliminate gaps in the timetable to provide a 'turn up and go' timetable from first to last train on all days of the week
   - Improve staff training, especially so that London Overground staff have a wider knowledge of connecting services and interchange possibilities to help them advise passengers
   - Conduct further research into what passengers expect station staff to know about

- Enhance the environment of stations, particularly at those with smaller footfall, by providing toilets, covered waiting areas and heating, wi-fi, catering outlets and reassurance that CCTV images are being monitored
- Investigate the feasibility of providing extended canopies at busy stations
- Improve the amount and quality of information given to passengers, particularly in times of disruption and where multiple operators serve the same station.

4. Better monitoring of the effectiveness of the devolved service model

- Commission Passenger Focus to extend National Rail Passenger Survey (NPRS) coverage to all stations operated by London Overground and Greater Anglia not previously surveyed, both before and after the change of concession in 2016. For comparison purposes, similar stations not previously surveyed and not included in the concession, but operated by other National Rail operators in the London area, should be surveyed at the same time
- At a strategic level, it would be good to ascertain the wider economic and social benefits of the devolved service model. TfL, the Department for Transport and the Office of Rail Regulation are recommended to commission a wider case study of London Overground to understand these wider benefits, and whether the devolved service model represents better overall value for passengers and taxpayers alike.

2 Research objectives and methods

Following publication of London TravelWatch's research[2] on value for money across all transport modes in August 2013, TfL asked us to conduct research into what passengers thought specifically about London Overground services. Rather than comparing perceptions across different transport modes the objective was to compare London Overground with other train operating companies, particularly those operating in similar parts of London to London Overground and where passengers use a combination of services to make their journeys.

The specific research objectives of the project were:

- To understand what value for money means in a fares context to those who are paying for their travel
- To identify what factors contribute to the value for money equation
- To assess awareness and perceptions of the ticket options available
- To evaluate the impact of journey and passenger environment issues (at stations and on train) on value for money perceptions
- To understand perceptions of current and future information provision
- To explore brand perceptions and the extent to which these impact on the perception of value.

A qualitative approach was adopted comprising six, two hour focus groups which allowed exploration of the issues in depth. Selection of the group was designed to reflect the views of a broad range of journey types and passengers using different branches of the London Overground network. All participants were recruited on the basis of having recent experiences of making journeys using services run by other TOCs as a point of comparison.

The groups included regular commuters, as well as leisure travellers, and the demographic profile of the focus groups reflected London's population. The sample was constructed to represent the views of passengers using daily, weekly, monthly and annual season tickets and Oyster Pay As You Go (PAYG). Freedom Pass holders were not included in the groups.

Group discussions were conducted among passengers living in a wide variety of locations across London and the South East who regularly use the East London, North London and Euston to Watford branches of London Overground, and one other train operating company to complete their journey. Two groups focused on

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[2] Value for money on London's transport services: what consumers think, 2013: www.londontravelwatch.org.uk/document/14387

each of these London Overground lines. The sessions were conducted in Central and South London.

Full details of the sample structure are outlined in Appendix B. The research approach adopted for this study was qualitative rather than quantitative because the primary objective was to gain insights from passengers and an understanding of their attitudes on value for money issues, rather than to provide a measurement of them, for which extensive data is already available from the NRPS. The intention was to over-represent London Overground customers and to include a cross section of users of TOCs and service providers in the London area rather than attempting to represent all of them equally within the research. The sample size and structure was designed to be sufficiently robust to provide indicative findings on issues that are hard to measure statistically. The recruitment and conduct of the groups is designed to provide the most robust results possible subject to this limitation.

3 Context

3.1 Previous London TravelWatch value for money research

The research London TravelWatch published in August 2013 was commissioned to provide an understanding of passenger perceptions of value for money on London's four main modes of transport – buses, trams, Underground and rail. The purpose of the work was to identify the main drivers of passenger satisfaction with value for money as a means of identifying areas in which future service improvements and investment would be likely to deliver maximum perceived benefit to passengers.

Although some positive aspects of National Rail services in London were identified, these were generally considered to be outweighed by a range of other factors, especially among commuters. The key issues in this respect can be summarised as follows:

- Commuters in the London area think that they have the worst conditions of any rail passengers since they pay the highest fares and suffer the worst travelling conditions
- Annual fare increases are difficult to afford in the current climate, and are particularly resented given the perceived absence of service improvements
- The quality of information available, especially during unplanned disruption, is often felt to be unsatisfactory
- The quality of rolling stock is variable but new trains serve to highlight the poor journey experience provided by older ones

The NRPS, a bi-annual survey of passengers carried out by Passenger Focus, is the major source of publicly available data on levels of satisfaction in the industry. London Overground consistently outperforms other TOCs that operate local services in the London area on the question of 'the value for money of the price of your ticket'. The most recent figures available at the time of conducting this research (Autumn 2013) show that 53% of passengers surveyed gave London Overground a positive rating (satisfied or good) and this rose to 56% in the subsequent survey. This compares favourably with the average for London and the South East (41%) and even with the national average (45%) that includes long distance and regional operators who typically tend to achieve higher satisfaction ratings. The full list of scores is shown in Appendix C.

The NRPS figures for the Greater Anglia Metro and West Anglia routes that will be transferred to London Overground in 2016 show 32% (satisfied or good) for the Metro route, and 39% (satisfied or good) for the West Anglia route. It is worth noting that passengers using a number of London Overground and Greater Anglia stations that will transfer to London Overground in 2016 have never been surveyed as part of the NRPS[3]. This means that, particularly in Travelcard zones 2 and 3, there is a deficit of data on passenger satisfaction.

It is recommended that in order to close this gap in knowledge of passenger satisfaction TfL should commission additional NRPS surveying of passengers at the stations served by London Overground and Greater Anglia that have not been surveyed, both before and after the change in concession in 2016. For comparison purposes it would be advantageous to also survey similar stations that will not be included in the new concession arrangements operated by other National Rail train operators in the London area.

3.2 The aims of this project

The overall objective of this project was to provide a better understanding of what passengers thought about value for money on London Overground services. But it also provided the opportunity to gain further insights into why London Overground consistently scores higher satisfaction ratings than most other London commuter TOCs in the NRPS and into what needs to be done to maintain and, if possible, enhance this favourable comparison.

Not only will these insights help TfL identify areas of improvement on existing services; the expectation is that they should be particularly useful in helping to inform the development of the service specification for the new London Overground concession from 2016.

In order to understand how London Overground is perceived to perform against other TOCs in the London area, it was necessary for this project to drill down into the rail related issues identified in our research on value for money conducted in 2013.

[3] Barking, Queen's Road Peckham, Clapham High Street, Bethnal Green, Stoke Newington, Stamford Hill, Southbury, St James Street, Wood Street, Emerson Park.

4 Consumer understanding of London Overground services

In previous qualitative research projects conducted for London TravelWatch and other organisations, inconsistent terminology has been used by participants when referring to services provided by London Overground. Similar confusion was observed on this occasion in the three key areas of: awareness, brand confusion and brand mapping.

4.1 Awareness of London Overground

For the purposes of this project, all participants were recruited on the basis of being regular users of London Overground. Additionally, an essential criterion was that all needed to be using another TOC in order to have a relevant point of comparison with London Overground. A critical element of the recruitment process was therefore to ensure that participants were aware of the identity of the operators of services they use when making different journeys. In order to ensure the accuracy of this, participants were asked to provide details of the journeys they made most frequently and were shown photos of London Overground trains to verify that they made journeys on these trains.

Given that participants had been alerted to these issues as a necessary part of the recruitment process, it was therefore interesting to observe that awareness of London Overground and the status of services provided was still not universal during the focus groups.

London Overground is not recognised as the name of the service provider even among some regular users. This is not an uncommon situation since passengers, especially leisure users, are often unaware without prompting of the name of the operator they travel with. However, there is consistent evidence from this and previous research to suggest that there may be a number of reasons why this is more likely to be an issue for London Overground than other TOCs. These can be summarised into five categories:

- ‘Overground’ is often used as a generic term by public transport users in the London area to differentiate National Rail services from London Underground

“I think that London Overground is just a descriptor rather than the name of the service” [Leisure user, East London]

- Passengers who use at least two TOCs on a regular basis (as required for the purposes of this project), and who may also be using other modes of transport, are less likely to be confident about the identity of service providers than those using a single mode or train company

"I just remember London Overground because it's orange and more distinctive than other train companies. I can get another train from Finsbury Park but I can't remember which company that is"
[Leisure user, North London]

"I don't take any notice. When you look on a journey planner it doesn't mention the name of the train company, just the route. I get on the one that comes first or will get me from A to B the quickest"
[Leisure user, East London]

- The choice of alternative rail and light rail options available in the London area may make accurate differentiation difficult for users who consider all formats to be 'just a train'

"Before I was a commuter, it used to confuse the hell out of me because I used to think that anything that ran on a track was a train but now I vaguely know the difference between the underground and the overground"
[Commuter, Euston-Watford]

"I think of London Overground and London Underground as being the same. They are all trains as far as I'm concerned"
[Leisure user, North London]

- The potential for mistaken identity was heightened among those using the Watford to Euston branch of London Overground since the age and seating configuration of the rolling stock was likened to the new trains on the Metropolitan line

"I recognise those colours as London Overground but that could be a Met line train as well because it's a similar sort of design"
[Commuter, Euston-Watford]

"I'm not sure if that is London Overground. It looks like a National Rail train to me. It also looks like the new trains on the Met line" [Leisure user, North London]

- The roundel format of the logo is closely associated with TfL and/ or London Underground which can be a source of confusion

"I only notice the logo rather than the name so I wouldn't put it with the other train companies because it feels different"
[Leisure user, East London]

4.2 Brand confusion

The issues highlighted above are compounded by low levels of brand awareness among consumers generally. Anyone with a vested interest in rail travel or public transport (and therefore more likely to understand the differences between different modes and operators), is excluded from participating in research exercises such as this and the majority of regular passengers tend to be focussed on concerns such as cost and reliability of services rather than matters such as brand identity. Therefore it is not surprising to uncover a degree of confusion among consumers when they are questioned in detail about this during a focus group.

In the majority of cases the main source of confusion appears to be related to the terminology used to define the nature of the service. The roundel identifies any service as being provided by TfL and the name Overground is obviously intended to distinguish rail services from the Underground network. However, this differentiation is not straightforward for many and confusion is compounded by the following factors:

- A significant proportion of the Underground network operates above ground level (i.e. ‘over ground’ to the general public)

“London Overground is part of London Underground but the trains go over ground. It’s quite confusing” [Commuter, Euston-Watford]

“I don’t think London Overground is the same as London Underground but they both have trains that run above ground, or am I getting confused with the DLR?” [Leisure user, East London]

- Overground is often used as a generic (rail) service descriptor by the public who are therefore unlikely to use the same word to identify a specific brand within that sector

"There used to be London Underground tubes or overground British Rail trains but now there is this thing called London Overground and I don't even know whether it is a line or a company or what" [Commuter, Euston-Watford]

- The uncertainty regarding the status of London Overground is perpetuated by TfL who do not clarify the situation for passengers. For example their rainbow status boards include information relating to London Overground and DLR services, but only at the network rather than individual line level. Meanwhile, at individual Overground stations, status boards only show the Overground network and not other services. This is not helpful as London Overground routes serve disparate parts of London with services which do not have a direct interrelationship with one another. So, for example, a problem on Watford – Euston is unlikely to impact on the East London Line.

Bakerloo	Good service
Central	Good service
Circle	Good service
District	Good service
DLR	Good service
Hammersmith & City	Good service
Jubilee	Good service
London Overground	Good service
Metropolitan	Good service
Northern	Good service
Piccadilly	Good service
Victoria	Good service
Waterloo & City	Good service

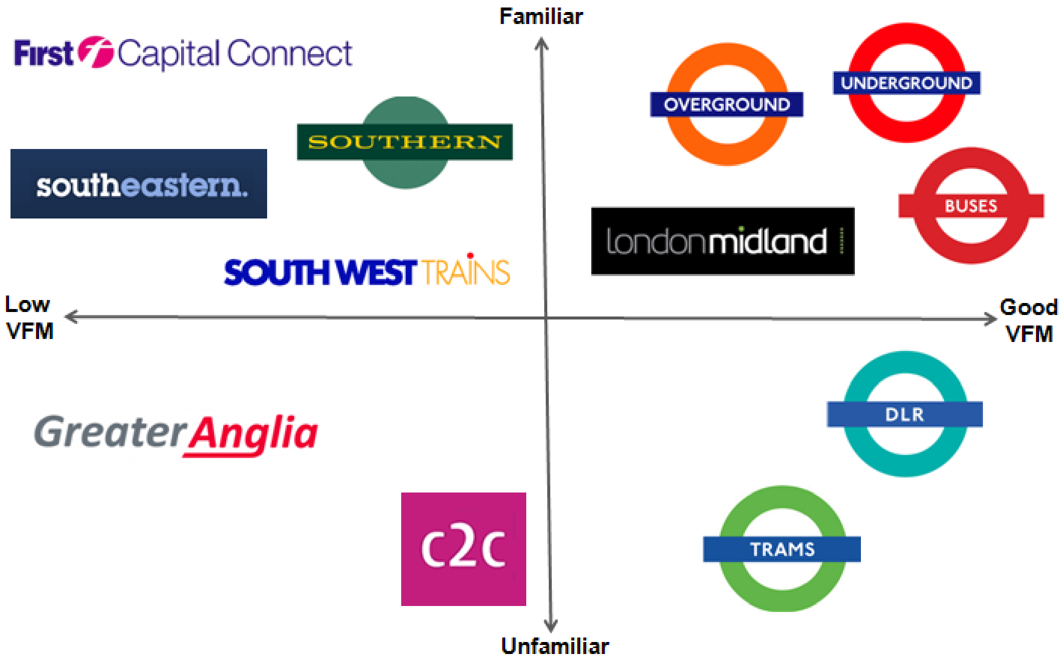
It is therefore not surprising that this confusion among consumers is reflected in the perceived positioning of London Overground in relation to services it competes or compares with in the London area. This situation was confirmed by the brand mapping exercises.

4.3 Brand mapping

Towards the end of the focus groups, participants were provided with a range of TfL and TOC logos and asked to arrange them in a way that would show how each of the brands are perceived in terms of the value for money they provided to consumers. In some sessions this resulted in the logos being divided into sub-groups of those that were considered to be similar and in other sessions they were ranked in order.

Although there were natural variations within each of the focus groups, the findings of this exercise were broadly consistent across the sample, especially in relation to the positioning of London Overground within its competitive set.

The diagram below represents a composite picture of how the various brands were perceived in relation to each other. The horizontal axis shows where the brands sit on a spectrum of perceived value for money by participants in these focus groups and the vertical axis shows the extent to which participants were familiar with the service provider (since not all brands were represented equally in terms of usage experience).



Although the nature of this exercise means that it is not possible to read too much into its results[4] and the findings are based on a qualitative sample only, it offers some interesting insights.

The mappings help to explain the NRPS data in relation to the value for money passengers perceive to be provided by different TOCs. On the basis of this qualitative exercise, there appears to be separation between London Overground and London Midland and the other TOCs providing services in the London area.

> *"I think of London Overground as being more like the underground than a train. I think that's a good thing for them because I would prefer to avoid travelling by train if possible" [Commuter, East London]*

The majority of TOCs are positioned towards the lower end of the value for money spectrum. This supports the findings from the work conducted by London TravelWatch in 2013[5], especially among commuters in the London area. The problem in this respect is the train companies operating commuter routes tend to be associated with high (and increasing) costs and poor quality travelling conditions. In a grocery brand analogy exercise conducted during that project, these TOCs were associated with prices comparable to those of a premium retailer, but with a customer experience that was likened to what might be expected at a discount store.

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[5] Value for money on London's transport services: what consumers think, 2013: http://www.londontravelwatch.org.uk/documents/get_lob?id=3734&field=file

"These (the TOCs) are the companies that provide services in and out of London. They are all expensive and have lots of delays and the trains are always packed and there is no air con" [Commuter, East London]

"The train companies are all poor value for money due to the costs associated with privatisation but London Overground is run by TfL which is public so doesn't have the same profit orientation" [Commuter, North London]

There was a noticeable difference in value for money perceptions of London Midland compared to other TOCs, especially among commuters. A few participants familiar with the Watford to Euston branch of London Overground chose to use London Midland rather than the alternative options available to them. The key motivation for this seemed to be a journey time of around 20 minutes with London Midland rather than 50 minutes with London Overground since no major differences in other aspects of service delivery were highlighted. This was the only example from this research of any other TOC being perceived to offer better value for money than London Overground.

"I travel from Watford Junction to Euston and London Midland is an 18 min journey so obviously I always use that. If I get the London Overground, the problem is that it takes about 50 minutes because it stops at every station. Southern is my other alternative but they are only one per hour" [Commuter, Euston-Watford]

In all other instances, London Overground clearly sits within the TfL family of brands rather than with other TOCs. As explained previously, this is in part due to the widespread confusion among consumers regarding this brand in the context of the nature of the service it delivers. Participants were always more inclined to separate London Overground from the TOC brands in the mapping exercises. This is partly explained by London Overground's strong association with the TfL brand or with Oyster which is generally regarded as a TfL product.

"All of the TfL brands should be together. They are cheaper because you can use Oyster but it isn't accepted by all train companies. The experience is usually better except buses which are always late because of traffic" [Commuter, East London]

"London Overground is the best value for money overall because the fares are really cheap, even for really long journeys and it's quicker than the bus and more pleasant" [Commuter, North London]

5 Value for money: how London Overground and other train operators compare

The following sections of this report consider the way in which London Overground compares to other train companies among users in value for money terms. This helps to explain and qualify the positioning it consistently achieves within the competitor brand mapping exercise.

5.1 Information before travel

Passengers may need to obtain information prior to making a journey involving London Overground or another TOC for planning purposes. This does not include information provided by TOCs to passengers during the course of a journey which is covered in a later section. It is mainly, but not entirely, relevant to leisure users, since they are more likely to need to plan aspects of the journeys they make. Commuters tend not to have the same need for this type of information since, by definition, they usually make the same journey frequently.

Recent research for London TravelWatch[6] and Passenger Focus / The Office of Rail regulation[7] has confirmed an increasing tendency for passengers to use mobile apps (including paid for ones) for journey planning purposes, and a number of participants in the focus groups said that they turned to these to either supplement travel information or to regard them as the default 'single source of the truth'.

Infrequent travellers and leisure users amongst the participants were just as likely to use apps as they are less familiar with how public transport works than regular users and commuters. The apps that tend to be most frequently used are ones that use TfL data and National Rail Enquiries, although Google and Citymapper were also mentioned during the course of this work. The availability and accessibility of such apps was particularly important amongst younger leisure users who participated in the focus groups, and was a key ingredient of why they chose to use London Overground as opposed to other modes of transport.

"I put in where I am and the destination on Google maps and it gives me all the train details and how many stops there are" [Leisure user, East London]

"National Rail Enquiries provide real time updates online and to my phone so it's better than the specific app for the train company. TfL is the same and has become second nature for me" [Leisure user, East London]

[6] Passengers' ticket purchasing and journey experiences, 2013: http://www.londontravelwatch.org.uk/documents/get_lob?id=3710&field=file
[7] The passenger experience (April 2014) http://www.passengerfocus.org.uk/research/publications/the-passenger-experience-summary-report

"I have always used the TfL website but now there is more choice because Citymapper and Google have good integration with trains" [Leisure user, Euston-Watford]

The main implication is that some consumers amongst the focus group sample claimed to be less likely to visit stations or ask staff for information in relation to rail journeys they are planning to make, because they regarded their app as being able to give more reliable, timely and relevant information than what might be provided by staff. This was particularly prevalent amongst younger users. However, amongst other participants, there was an equally strong view that staff are necessary to provide reliable, timely and relevant information[8]. This is consistent with findings of research published by London TravelWatch in 2013.[9]

"I use staff less often now but I would hate to lose them because they are very knowledgeable for route and fare advice" [Leisure user, East London]

In the event of needing to ask station staff for information, no differences between London Overground and other TOCs were identified at a spontaneous level. The main reason for this is that consumers tend to associate rail staff with the station rather than a specific train operating company. Any positive or negative experiences in this respect will therefore be attributed to the individual member of staff or possibly the station management but not the service provider. It is recommended that TfL should explore this issue in greater depth by further research into the levels of knowledge that passengers expect from station staff[10].

"There are four different train companies that service Watford Junction but I assume the staff are employed by the station, I don't associate them with any particular train company" [Commuter, Euston-Watford]

"I think it depends more on location than company. The more central you are the more helpful and knowledgeable the staff seem to be" [Commuter, Euston-Watford]

"I don't think of them as London Overground staff. I associate staff with the station rather than a train company so I assume they will all be the same" [Leisure user, East London]

At a prompted level, when trying to identify TOC specific differences, a perception was expressed that London Overground stations are less likely to be manned than stations served by other TOCs (even though this is not factually correct). However, this was not a consistent view across the sample and was

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[8] The key issue for the purposes of this project is that there is no evidence to indicate that there are any tangible differences between London Overground and other TOCs from a journey planning perspective. There may be a subliminal link between London Overground and the TfL journey planner for some who use it but this was not identified at a conscious level during the focus groups.

[9] Passengers' ticket purchasing and journey experiences, 2013: http://www.londontravelwatch.org.uk/documents/get_lob?id=3710&field=file

[10] TfL has introduced a 'Quality Performance Regime' to monitor the quality of service provided by staff.

most likely to be related to individual experiences at specific stations rather than being a perceived characteristic of the London Overground network.

"I think that London Overground stations are less likely to be manned than other stations and there is no one to help late at night or they use agency staff who don't have the same level of knowledge" [Leisure user, Euston-Watford]

A small number of participants suggested that staff at London Overground stations may be less knowledgeable than other rail staff. TfL might like to explore this further with London TravelWatch to identify areas where this could be the case, as this observation may be based on perceptions related to the relatively recent introduction of London Overground services and hence staff being less familiar with the industry generally than those employed by other TOCs.[11].

"I don't know if London Overground staff are that helpful. I have only needed to ask on the odd occasion but other rail company staff tend to know train times automatically but London Overground staff don't seem to be as knowledgeable" [Leisure user, North London]

It is recommended that London Overground staff should receive more customer service training, and be better equipped to deal with queries relating to other TfL and TOC services. This should involve greater familiarisation with other operators' services that have a direct interchange with London Overground.

5.2 Choosing and buying tickets at the ticket office

As indicated above, some consumers prefer to avoid interacting with staff in situations where their needs can be met in other ways. This is not always possible when purchasing a ticket since passengers often want the reassurance of talking to a member of staff to ensure they have made the correct choice or to ask questions regarding the route or other issues related to the journey.

Participants in the focus groups often perceived face-to-face transactions with staff at stations to be difficult. One of the main reasons for this could be that there seems to be in the minds of the passenger no pattern or logic to the hours that a ticket office is staffed or the numbers of personnel working there at any one time. People are aware that suburban stations in quiet areas will usually have a member of staff available until the last train of the night has departed, however busier stations often seem not to be staffed in proportion to the number of passengers wanting to buy tickets. This creates a perception that there will often be long queues at ticket offices and therefore becomes something that needs to be factored into the total journey time.

[11] Staffing of many London Overground stations was in many cases only reintroduced in 2007 (or at expansion dates in 2010 and 2012) after a very long gap. Typically, the new staff employed initially were agency staff, not necessarily with a transport industry background, and with a specific remit that focused more on providing security and visible presence rather than a more overtly customer service role.

"There is often a queue at the ticket office and you have to top up a minimum of £5 which is a disadvantage. I prefer to use my local newsagent because they are more organised" [Leisure user, Euston Watford]

Once again, problems associated with ticket offices are considered to be generic rather than attached to any particular TOC, especially since most passengers do not know who is responsible for operating stations and therefore determining staffing levels.

"I have no idea who decides on the opening hours. I think it is down to the person behind the counter and what time they decide to go home" [Commuter, North London]

In response to more detailed probing around this subject area, a small number of participants mentioned that fare zone issues can cause difficulties. Two problems were raised:

- When required, people thought that an extension ticket needed to be purchased from a ticket office as this was considered to be a type of transaction that would be too complex to attempt at a TVM[12]

"I have a zone 2-4 Travelcard and when I go into London I can't buy the extension from a machine, I have to go to a manned station" [Commuter, East London]

- It is not possible to buy all types of ticket at all points on the network. For example, one respondent had been unable to buy a zone 1-3 ticket from a station in zone 6

"At East Croydon they wouldn't sell me a zone 1-3 Travelcard due to a fraud risk or something. I assume that's for big stations only but a smaller station would sell you what you want" [Commuter, East London]

These problems are more associated with TfL rather than London Overground. However, in the context of research which was focused on understanding differences between London Overground and other TOCs, participants were likely to make the connection between TfL and London Overground.

5.3 Buying tickets at ticket vending machines (TVMs)

TVM issues were discussed to understand whether there were differences between using London Overground machines compared to others, and whether this had any impact on overall value for money perceptions. One or two difficulties in using the machines were mentioned, but there was no evidence to suggest that these were in any way linked to a specific TOC.

"I assume the machines all share a centralised computer that will find the cheapest ticket. I expect them all to sell a full range but it is complicated and can take a lot of time" [Leisure user, East London]

[12] Although Southern has successfully added this feature to some of its TVMs. London Overground will add this feature in October 2014.

Some TVM limitations were identified although these were more likely to be associated with TfL generally rather than London Overground. As explained above, purchasing zone extensions from a TVM was considered to be challenging. Some participants dislike the machines that allow fixed value Oyster PAYG top ups in multiples of £5 only, but think of this as being a problem with the TVMs on London Underground[13] rather than at National Rail stations.

"London Overground machines allow you to top up any amount on your Oyster but the Underground ones have to be a minimum of £5 and I think that's pretty bad" [Commuter, North London]

The issues raised in relation to London Overground TVMs are more likely to be misperceptions or based on an isolated experience rather than being indicative of underlying or brand problems.

In response to prompting from the moderator on this issue, the only comments received from people within the focus groups were as follows:

- A perception that topping up Oyster PAYG involves an extra step in the process compared to TVMs on London Underground (although this was thought to be true for all TOCs rather than London Overground only)

  "I think London Underground machines are quicker for topping up Oyster. I think National Rail and London Overground machines have one extra stage in the process which is a problem if your train is coming" [Leisure user, North London]

- One participant thought that Oyster PAYG could not be topped up on London Overground TVMs

- One participant claimed that the Oyster usage history summary is not available on London Overground TVMs

- One participant had a perception that London Overground TVMs are often not working

These difficulties with TVMs seem to be due to a general lack of knowledge of how to use them or based on unreliable recall of specific problems experienced rather than being a specific London Overground issue. However the inability to get an Oyster history summary from London Overground TVMs was previously identified as a problem for passengers, and previous London TravelWatch research recommended that this be addressed both in respect of TVMs operated by London Overground and other National Rail TOCs[14].

It is therefore recommended that TfL should pursue the ability to get an Oyster history summary from London Overground TVMs further as part of the process of letting a new concession for London Overground.

[13] Although this restriction applies only to certain types of London Underground TVMs.
[14] Passengers' ticket purchasing and journey experiences, 2013: http://www.londontravelwatch.org.uk/documents/get_lob?id=3710&field=file

London TravelWatch notes that there has been a move by some London TOCs to remove the ability to pay by cash at TVMs in recent years or to install new machines that do not include this functionality. In particular, First Great Western TVMs on the route of Crossrail (except at Paddington and Ealing Broadway) do not accept cash. **It is recommended that TfL should aim to rectify this in any Crossrail concession. Similarly, London Midland operated stations with the exception of Euston and Watford Junction, do not have cash accepting TVMs.**

"You can't get your Oyster history on a London Overground machine even though they are in the Oyster area, so it would be handy to be able to do that" [Commuter, North London]

There was no evidence amongst the focus group participants to suggest that TVM usage exerts a positive or negative impact on value for money perceptions at a brand level. Many in the focus groups expressed a preference to use London Overground TVMs because of their greater flexibility in terms of ticket types and the coinage (e.g. ability to use 5p pieces) that could be used in them compared to London Underground TVMs.

5.4 Buying tickets – types of tickets

At a spontaneous association level, participants assume that all rail stations will sell tickets for any rail journey, especially within the London area. At a more considered level, when asked during the focus groups, there was some uncertainty about whether a TOC would sell tickets for travel on another TOC's network.

"I think all stations should sell the same tickets, especially if they are all part of Oyster. I don't know whether they do but I think they should do" [Leisure user, North London]

"London Overground may be different because all their stations are in the Oyster network but I find it all a bit confusing to be honest and don't really know who sells what but it doesn't cause me any problems" [Commuter, North London]

This raised an interesting question about expectations of London Overground in the context of this work. Some participants anticipated that London Overground would have the widest range of tickets available on the basis that they are perceived to represent both the National Rail and TfL networks. This tended to be a peripheral issue for the majority and most were more interested in the status of London Overground in relation to Oyster ticketing. However, the broad make up of the focus groups may mask local station requirements - particularly at interchange stations or those at the periphery of the London Overground network.

The key concern in this respect is that a full customer service in relation to Oystercards should be available from all stations in the Oyster area. Some participants expressed dissatisfaction at being told that problems experienced with Oyster (such as incomplete journeys) have to be resolved at London Underground stations. This can represent a considerable inconvenience for Oystercard users in certain parts of London, especially those in this sample living in the Croydon area. Although this is not regarded as a problem that is exclusive to London Overground, it is seen as less acceptable for it to occur at these stations due to the TfL association.

"There are often long queues at ticket offices, especially on Monday but what winds me up is when you have a problem with your Oyster and you stand in a queue for them to tell you they can't help and to go to the TfL website" [Commuter, East London]

"It's a hassle to resolve problems and takes time. I was told I had to pay to travel to Morden to get my money back so I didn't bother" [Leisure user, East London]

There was one instance where an Oyster Travelcard was perceived to be unavailable. The respondent commuted from Norwood Junction to Whitechapel and wanted to put a monthly Travelcard for this journey on an Oystercard but had been told that this was not possible, although this has now been rectified. Another respondent had the opposite problem at Penge West.

"I travel from Norwood Junction and wanted to get a weekly pass on my Oyster but they said it had to be a paper ticket for a station to station journey which is a pain because I need a photo card for that" [Commuter, East London]

"I was told I could only get a weekly Travelcard on Oyster but not a paper ticket. I don't understand why not but I just started buying it from Clock House instead to avoid the problem" [Commuter, East London]

Many leisure users making journeys with Oyster PAYG are unaware of the implications of travelling during the afternoon peak period and the impact that this has on fares during that time. Some claim to be unsure whether the afternoon peak applies to London Overground on the basis that journeys are not being made from central London to commuter belt areas served by other TOCs. Others are aware of a price differential but are unfamiliar with the exact details and consider this to be an 'invisible' cost when using Oyster PAYG.

"I know that there are peak and off-peak times but I don't really know when they are. In my head I know there is a difference, I think peak is between 7am and 10am isn't it?" [Leisure user, North London]

"It's almost like Monopoly money when it's on your Oyster card, you need to make a journey and you just don't think about whether it's peak or off-peak" [Leisure user, North London]

"I know that off-peak starts at 9.30 in the morning but I didn't know there is another peak period in the afternoon. I thought I knew how Oyster works but now I am confused!" [Commuter, East London]

"I'm only aware of the off-peak times when I book tickets online. I assume they wouldn't enforce the restrictions at stations so I would be prepared to chance it" [Leisure user, East London]

"One of the advantages of having a season ticket is that you don't need to worry about peak and off-peak times but I don't think there is a peak period on London Overground" [Commuter, North London]

5.5 Purchasing through tickets to London Underground and DLR stations

At present passengers wishing to buy paper tickets between London Overground and London Underground / DLR stations from TVMs need to know that instead of typing the station name into the machine, they should type Zone U1 or whichever zone their destination station happens to be in.[15] **It is recommended that a change is made so that London Underground / DLR stations are named on London Overground ticket vending machines.**

5.6 Dealing with overcrowding

Overcrowding was not intended to be a focus of this research, but when participants expressed dissatisfaction with travelling on crowded commuter services during peak hours, they were briefly asked for suggestions about what could be done to help resolve the problems experienced.

This issue came up on a number of occasions as part of previous London TravelWatch research among commuters in the London area and the findings from this work are broadly consistent[16].

Although commuters are unhappy with the current situation, the majority simply doubt that satisfactory solutions to the problems could be found. A minority were initially in favour of the concept of a morning pre-peak period in which journeys completed before a certain time (e.g. 07.30) would be charged at the off-peak rate. On reflection, this was dismissed as unworkable on the basis that

[15] This can result in passengers sometimes buying more expensive tickets than strictly necessary. An example would be a single from Honor Oak Park to Heathrow Airport Terminal 5: Type in Heathrow and you will be offered only a journey via Heathrow Express at £28.10. However, type in Zone U123456 and travel via the Piccadilly line and the single fare is £5.70 (An Oyster Pay As You Go charge would be £5).

[16] The London Travelling Environment: What London consumers think, 2014: http://www.londontravelwatch.org.uk/documents/get_lob?id=3780&field=file

passengers would be penalised in the event of services being delayed or other events over which they have no control. Additionally, there was some feeling that this would have the effect of creating a second rush hour (or extending the current one) and the current problems will therefore remain unresolved.

"The pre-peak thing won't work because when there are delays you will finish your journey in peak time and be charged the full fare" [Commuter, Euston-Watford]

"I might consider it if it was available but I can't see it happening. If they introduced that I would expect the service frequency to suffer" [Commuter, East London]

"It might work in the summer months but what about if everyone starts to do it? If it becomes popular the train companies will start to include it as peak time. What ticket would you get if you travel home during the afternoon peak?" [Commuter, North London]

The idea of time-shifting or more flexible working hours was also discussed in some of the focus groups. Participants understand how changing their working day to 11.00-19.00 (for example) would help to relieve peak travel problems but do not consider this to be a realistic proposition. This is often claimed to be on the basis that employers would not be prepared to tolerate the degree of flexibility that would be required for it to work.

"The problem is that it is engrained into people's consciousness that they will be at work from nine to five" [Commuter, North London]

However, participants felt that an equally significant barrier to acceptance of either of these suggestions would be that many passengers are not prepared to accept the lifestyle compromise that would be required. For example those without children might be reluctant to wake up earlier or lose their evenings and a change in working hours is unlikely to be practical for the majority of working parents.

"I can work any time between 7am and 7pm so I could go in at 10am but then I would have to stay later. It's my preference to travel during peak times and be at my desk by 8am because then I get home earlier" [Commuter, Euston-Watford]

The possibility of paying less for a ticket that allows standing only was suggested in one of the focus groups but was treated as a joke rather than a serious possibility. Even though this would benefit those who are unable to get a seat, or those with short journeys who would be prepared to stand, the idea was dismissed as being impractical and impossible to enforce.

An additional barrier to acceptance of what are considered to be radical and unrealistic schemes is that commuters consider these to be unnecessary when 'simple' solutions are perceived to be available, such as more frequent services and / or longer trains to cope with additional demand during peak periods.

Albeit from a limited sample, these findings suggest that 'peak spreading' solutions are unlikely to generate any significant change in behaviour by passengers, at least without very substantial incentives, and therefore will not provide any additional capacity on London Overground when and where it is most needed. The current policy of platform and train lengthening, and where possible increasing frequencies, would therefore be seem to be the only practical solution to London Overground passengers.

"They should lay on more trains at peak times. Sometimes at Watford there are only 8 carriages and that's just not enough, it should be 12" [Commuter, Euston-Watford]

6 The use of Oyster on London Overground

Previous research conducted by London TravelWatch across London's transport services as a whole has indicated some general strengths and weaknesses of Oyster that are experienced among users[17]. The results from this focus group research, as set out below, were reasonably consistent with previous findings. If these issues could be addressed across the network, London Overground as a service would be likely to achieve higher value for money ratings, if only because it is strongly associated with TfL. By the same token, since the cost of travel is the main driver of attitudes towards value for money, actual and perceived problems with Oyster could be exerting a significant impact on the standing of London Overground services.

It is interesting to observe that awareness and knowledge of how to get the best from Oyster cards is still by no means universal among passengers making regular journeys in the London area. The main advantage and usage incentive among Pay As You Go users is that it is assumed to be the cheapest and most convenient way to travel, although this is not always the case.

The benefits of Oyster outweigh the disadvantages. However, these benefits are still being undermined by usage difficulties that came up again in the focus groups as summarised below.

6.1 Daily cap

There is still considerable confusion and misunderstanding about what the daily cap is and how it is applied, especially among leisure users. Some passengers do not know the maximum amount they will be charged at the end of the day, or what impact travelling during the afternoon peak on weekdays is likely to have. On the basis of past experiences (likely to have been as a result of 'incomplete' journeys), some passengers who do know what the cap is may not trust the correct amount to be deducted.

> *"When I have been into London at the weekend, using Oyster PAYG can cause lots of problems and hassle. It's something to do with the daily maximum that you are charged but I don't understand how it works" [Commuter, East London]*

6.2 'Invisible' fares or balance

Many passengers use Oyster PAYG in the belief that this is the cheapest way to travel, but have no idea of the fare for each journey they make. This tends not to be a problem on most occasions, but represents an opportunity to reinforce

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[17] (a) passengers' ticket purchasing and journey experiences, 2013: http://www.londontravelwatch.org.uk/documents/get_lob?id=3710&field=file and
(b) incomplete Oyster PAYG journeys, 2011: http://www.londontravelwatch.org.uk/documents/get_lob?id=3347&age=&field=file

positive value for money perceptions of fares on London Overground and across the TfL network.

"On the bus or the underground you always know how much you are paying for the journey but on London Overground it's always a different amount so people are less aware of what those different amounts are" [Leisure user, North London]

"When I use Pay As You Go I'm always a bit dubious about how much is being deducted because I know certain things cause problems, like if you enter a station but leave immediately if the train is delayed" [Commuter, North London]

"It doesn't always show the balance when you tap out and even if it does it might not show the true balance because it applies the cap at the end of the day" [Leisure user, Euston-Watford]

TfL's response to the previous research recommendations was to produce a comprehensive fare chart for each London Underground station, to be posted in station booking halls. It is recommended that similar charts are produced for London Overground operated stations.

Some claimed that they are often unaware of the balance available on their card. Three possible explanations for this were identified from the focus groups (all are consistent with what passengers have told us in previous research):

- Lack of awareness that balance information is displayed by card readers
- Inability to interpret the information displayed by card readers
- Inability to read the information displayed by card readers due to the size or legibility of the characters, or because of the short length of time that these are displayed.

6.3 Incomplete journeys

Since London TravelWatch first published research on this subject in 2011, there seems to be a heightened level of awareness of the likely causes of incomplete journeys but not necessarily how to avoid them being incurred. The main problem is widely considered to be the lack of easily visible readers at ungated stations (including many across the London Overground network)[18]. Some interchanges are still regarded as a problem in terms of passengers not understanding when and where to touch in and out. Wimbledon Station, with its National Rail, London Underground and tram services, was again highlighted as a particular problem in this respect.

[18] Although London Overground has taken up the previous research recommendations for better signage of readers, it is recommended that this practice is expanded to cover stations on the Greater Anglia network that will become part of the new London Overground concession in 2016.

"At some stations there is nowhere obvious to touch out so you get charged an absolute fortune, but it shouldn't be my problem if there is nowhere to touch out" [Leisure user, North London]

"There tend to be more London Overground and National Rail stations where there are no readers to touch out so you are more likely to forget. It seems to be more of a problem the further out you go" [Leisure user, North London]

"Even if you can get a refund, you have to wait 48 hours for it to show on their system and then you have to nominate where it will be refunded which is a problem because I don't always travel from the same station every day" [Commuter, East London]

"Touching in and out can cause problems. If you don't understand it you can be charged a fortune and have a debt on your card. It happened to me at Wimbledon but I don't know why" [Leisure user, East London]

"The Oyster system doesn't seem to have caught up with the way the card is used. If you need a refund it either costs a lot on the phone or stations can't do it so people can't be bothered due to the process. It's too complicated and long-winded to get back what you are owed" [Commuter, North London]

"London Overground need to make it more obvious where the readers are at some of their stations because it's easy to forget when it's busy. There should be posters or something to remind you to touch out" [Leisure user, Euston-Watford]

Previous research indicated that passengers' preference was for stations to be gated to reduce the probability of an unintentional 'incomplete' journey**. It is recommended that the new London Overground concession should include a requirement to add ticket gatelines at stations currently without them.** Gating would not only address this issue but also improve passenger security**.** London TravelWatch has previously proposed that stations with annual passenger counts of over one million per year should be gated[19].

6.4 Lost cards

There is minimal objection among consumers (both in this focus group and in previous research carried out for London TravelWatch) to the principle of paying a deposit for an Oyster card, although this becomes more of a problem on each occasion that a replacement card is required. Naturally, the financial consequences of losing an unregistered card are magnified if it holds a PAYG credit balance.

The inconvenience of replacing a lost card can be an equal or stronger disincentive for some than the financial implications.

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[19] Fares and Ticketing Committee, February 2010. http://www.londontravelwatch.org.uk/documents/get_lob?id=2072&age=&field=file

6.5 Stored value

There is some resistance to the concept of Oyster PAYG being a pre-payment card. A small number object to the principle of paying in advance for journeys that will be made at some point in the future. Attempting to ensure that the card retains a neutral balance can therefore be challenging for some (especially in the absence of adequate knowledge of fares).

This is a particular issue for London Overground, as many passengers choose to use it on the basis that, for most journeys, it does not require travel via zone 1 and therefore attracts a lower fare. This means that the service is much more accessible and attractive to people on low incomes, because they do not have to commit to significant expenditure with one provider in advance[20].

"Using Oyster Pay As You Go is definitely better value for money unless you lose the card and don't mind the unused credit being in their bank account" [Leisure user, East London]

6.6 No receipt

When making journeys for business purposes, a receipt is likely to be needed. The process of obtaining something that will be acceptable for company expenses when using Oyster is much more complex than getting a receipt for a Travelcard or any other type of ticket. As an alternative journey statements on online accounts can be used for business travel expenses.

"The only time I don't use Oyster is when I am travelling on company business because I need to provide a VAT receipt for my expenses" [Commuter, North London]

The consequence of the difficulties outlined above, either individually or collectively, is that some passengers still prefer to use a daily Travelcard for the following reasons:

6.7 Reasons why passengers don't use Oyster PAYG

Using a paper ticket can be considered to be less hassle than using Oyster PAYG (especially for those who have never used Oyster). It removes the possibility of incomplete journeys and the TVM transaction is no more complex than topping up an Oyster PAYG balance.

"Using Oyster can be complicated if you don't understand everything about it so it might be easier to use a Travelcard" [Leisure user, Euston-Watford]

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[20] The average top up at a London Overground station is £7.86 compared to £10.12 at London Underground stations, £8.28 at DLR stations, £10.61 at National Rail stations and £5.57 at Oyster ticket stop agents.

Value for money

A small minority are aware that an off-peak Travelcard can be used during the afternoon peak for most service providers. This can have the effect of making a daily Travelcard better value for money than using Oyster PAYG (and will more than compensate for the cost difference between the paper ticket and the capped Oyster (off-peak) fare on the rare occasions when this is known about).

Discounts

One or two participants claimed to prefer to buy paper tickets in order to qualify for discounts provided by Railcards or to take advantage of other offers (such as two for the price of one at certain London attractions). It was generally assumed that these benefits would not be available in the event of using Oyster PAYG instead.

"I have got my Oyster linked to my railcard but I don't know what the benefit is. I think I get money off a Travelcard but not PAYG but I'm not sure. Someone told me to link them so I did but I don't know what I get" [Leisure user, North London]

"We get a third off for long journeys with a Family Railcard and two for one offers if we use Travelcards so that may be easier and cheaper than all of us using separate Oyster cards" [Leisure user, East London]

As there are discounts available for Oyster railcard holders, it is recommended that these are better promoted by TfL and that registration of such discounts is made available at London Overground stations.

7 London Overground as a service – general views and their impact

During the research, a number of factors were identified as having a significant influence on perceptions of rail journeys made in the London area. Each of these were assessed in terms of how London Overground is considered to perform compared to other TOCs that it compares or competes with for journeys made by participants. The issues most consistently identified in this respect are explained in the following six sections.

7.1 Cost

Unsurprisingly, because these discussions focussed on understanding value for money in the context of rail journeys, cost tended to be a dominant theme and the basis for perceptions of London Overground and comparisons with other TOCs.

Findings in this respect are interesting since consumers tend to be unaware of whether there is likely to be a cost difference between London Overground and other TOCs for a number of reasons:

- Commuters focus on the total price paid for their season ticket and tend to be unaware of the cost of specific elements of journeys made

- Leisure users tend to pay for their travel by the day rather than for a single mode

- Passengers in general tend not to know the fare of a specific mode or leg of a journey for the reasons explained above.

- Journey costs can be 'invisible' to Oyster PAYG users who pay for their travel in advance on a pre-payment card

- All participants were recruited on the basis of using London Overground and at least one other TOC on at least an occasional basis, but very few have experience of making or paying for directly comparable journeys (with the exception of those travelling between Watford and London Euston).

Findings in relation to fares, therefore, often tend to be based on perceptions rather than knowledge or experience. The most important influencing factor in this respect is explained by the positioning of London Overground in relation to other TOCs in the brand mapping exercises conducted during the focus groups. London Overground tends to be separated from other TOCs on the value for money axis. While TOCs that serve commuter areas of the South East are considered to be expensive on a per mile basis, London Overground benefits from being associated with TfL by comparison.

This is reinforced by the link with Oyster PAYG which is widely assumed to be the cheapest way to make journeys in the London area. There is even occasional evidence from the research to suggest that London Overground compares favourably with other TfL modes in cost terms. This is primarily due to a common belief that journeys on London Overground can be made at relatively low cost since almost all routes avoid Zone 1. This means that some long journeys on London Overground can feel or be cheaper than a shorter journey on London Underground that covers Zone 1 and 2 or paying to travel between a couple of stops on a bus (or tram).

"London Overground is better value for money than the Underground because on the Underground you get charged for Zone 1 even if you are only travelling through it but you can avoid Zone 1 on London Overground" [Leisure user, North London]

"I think my journey on London Overground is cheaper than the alternative route I do. Pay As You Go journeys are cheaper on London Overground and single journeys are cheaper than other train companies" [Commuter, East London]

"My journey is definitely cheaper on London Overground because I don't have to pay more to travel through the central London zone" [Leisure user, East London]

"London Overground is cheaper than other train companies in London and can cost less than some bus or Underground journeys so comparatively it's really good value for money" [Commuter, North London]

Favourable cost perceptions are strengthened by the widely held view that London Overground is part of a body that regards public transport as a public service for London, rather than being operated by a private franchise motivated only by making profit for shareholders.

"London Overground integrates with all the other TfL brands so it's focused on serving the London community and it's not privately owned" [Commuter, East London]

"It feels like it's nationalised and run by Boris rather than being a private company" [Leisure user, East London]

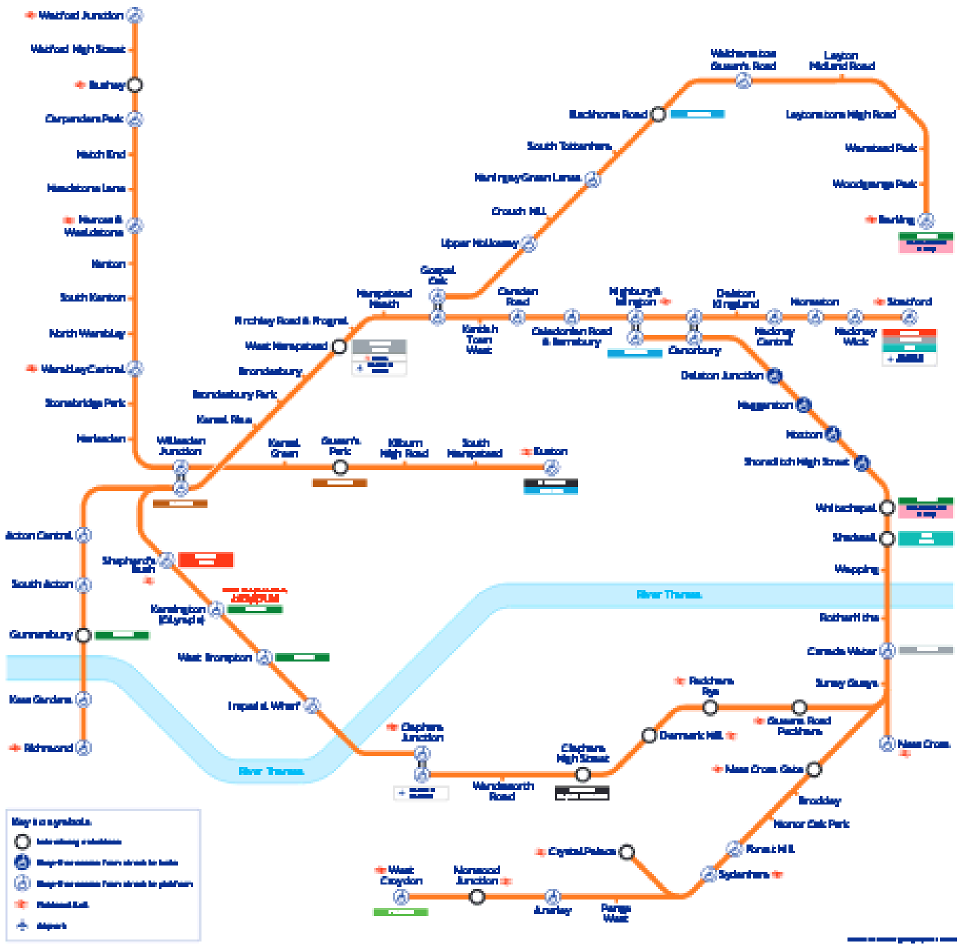
The only issue identified as having a negative impact on perceptions of London Overground fares is the inability to buy Advance tickets that are known to significantly reduce the cost of certain journeys with other TOCs.

"Some of the train companies can be really good value for long journeys if you book it a long way in advance, but London Overground is always the same price because you touch in and out" [Leisure user, North London]

"It works out cheaper than using other methods of travel because you can avoid going into central London and paying through the nose for Zone 1" [Commuter, East London]

The current London Overground website does not have a direct path to purchasing tickets or to topping up an Oyster card. There is also an issue that for many advance purchase fares, direct point to point tickets from London Overground stations are more expensive for passengers than using a combination of Oyster PAYG and an advance purchase ticket from the changeover station. This then requires passengers to exit and then re-enter these stations if they use this option to get the lowest fare.

It is recommended that the LOROL website is upgraded to provide a direct National Rail ticket selling facility and to provide a direct link to an online Oyster top up facility.



7.2 Service

Attributes

One of the key attributes of London Overground is that it is expected to have service delivery standards that are closer to what would be expected from TfL than the majority of TOCs it competes with. Many users recognise that London Overground has an unfair advantage in this respect because its network is less heavily focused on radial commuter routes, but appreciate the service related benefits that are a consequence of this.

Many participants living in London like the feeling of London Overground providing a service exclusively in their area, rather than being merely a link between London and outlying areas as is the case for all other TOCs in its comparative/competitive set. One or two referred to it as an orbital service that is unique in being able to link all areas of London with all others. This is something that should be emphasised more. There is also some feeling that London Overground has been purposefully designed to fill gaps that previously existed in London's public transport network. Those who rely on public transport therefore like the idea that using London Overground offers maximum interchange possibilities, since this enhances the view that the service has been designed with their needs in mind. There are a number of opportunities where this positive attribute could be exploited further by additional stations and platforms either directly on London Overground routes e.g. Junction Road for interchange with the Northern line at Tufnell Park or Brixton (High Level) with the Victoria line and Southeastern, or where other operators services could be provided with an interchange with London Overground e.g. West Hampstead on the Chiltern line; Brockley (High Level) on the Southeastern route between Lewisham and Nunhead.

> *"I use London Overground because it covers areas that other services don't go to which is the reason it was brought in in the first place I think, to link up places that weren't very well connected" [Leisure user, North London]*

Many users consider London Overground services to be efficient and reliable. Unusually for rail focused research, participants were positive about the punctuality of trains, that they claimed ran to schedule most of the time and seem not to be subject to problems caused by signals and operational issues that affect other TOCs[21]. It was occasionally implied that this could be due to London Overground running trains within a largely exclusive network that is not shared with other service providers, although this was never expressed explicitly.

> *"I think of London Overground as being more reliable because their trains tend not to break down so often, maybe because they are new, so there are fewer delays" [Leisure user, Euston-Watford]*

[21] This may be due to the halo effect as London Overground is not immune from service disruption and delays.

The majority of users are also positive about the frequency of London Overground services, especially when compared with certain routes operated by specific TOCs. Although a timetable is known to exist, some consider that the intervals between services is short enough to make them somewhat redundant (in the same way that many feel about London Underground, buses and trams). Some users also welcome the fact that services on certain routes run until late at night and even later than London Underground in some limited instances. The North London line between Camden Road and Stratford was positively mentioned in this respect as a more favourable alternative to other modes in order to be able to make the most of a night out.

Weaknesses for existing users

Importantly, all of the issues identified in this work were considered by the participants to be things that rail users are prepared to tolerate, rather than being regarded as problems that have a significant negative impact on overall value for money perceptions.

These can be separated into two categories: issues that are considered to be common to all TOCs and others where a difference between London Overground and other TOCs is perceived to exist.

Issues common to all train operators are as follows:

- Some routes suffer from overcrowding at peak times. Passengers understand and accept why this will occur in London but naturally dislike travelling in these conditions. Some participants considered this to be more bearable than on other TOCs due to the fact that journey lengths on London Overground are shorter and because carriages are better designed to cope with high volumes of standing passengers (see section 6.3). However, there is an issue with passenger ‘churn’ that was mentioned by some participants, particularly when most seats are occupied at the very beginning of journeys, which reduces the chances of seating for other travellers for part of the journey. This is a source of potential dissatisfaction amongst regular users.

“The problem is that some of the trains can be packed, especially because they don’t run as frequently as underground trains” [Commuter, East London]

- The frequency of late night and Sunday services is occasionally considered to be inadequate. Users accept that commuter services provided by other operators will run with reduced frequency at these times but argue that there is a consistently high demand for public transport in London at these times and that this need should be recognised and met by London Overground.

It is recommended that on existing London Overground lines the hours of operation of standard off-peak turn up and go frequencies is extended until the close of service in the evenings and at weekends.

“I think some of the routes could run later at night, especially the one that goes from Camden to East London” [Leisure user, North London]

"The frequency of the trains can be an issue, especially if one gets cancelled and when I tried to use it at the weekend the Sunday service was appalling" [Commuter, East London]

"I think the trains seem to finish earlier than other companies. They don't run late enough so it can be a nightmare to get back if you go out for the evening" [Leisure user, East London]

Issues specific to London Overground are as follows:

- Services are considered to be slower than those operated by other TOCs due to the fact that trains call at all stations that are often close together and no fast alternatives are available. This has an adverse impact on journey times that can feel disproportionately long in relation to distances covered compared to other TOC's routes. This was highlighted as the main disincentive to use London Overground by commuters who use London Midland for journeys between Watford and London Euston but recognised as less of an issue among those making other journeys across the London Overground network or for leisure users.

"It may be a longer journey on London Overground but I don't mind if it makes my commute cheaper because I want to save money if I can" [Commuter, East London]

"The trains do tend to take the long way round but I find the journey is more pleasurable because they are a different design so there is more space, especially if you are standing" [Leisure user, East London]

- In more than one of the focus groups, a view was expressed that London Overground services coped less well with poor weather conditions than other TOCs. Although services seem to be less subject to delays caused by signalling and other operational difficulties, they are occasionally felt to be more susceptible to problems caused by rain and ice[22].

"In terms of reliability, London Overground is marginally better than other train companies but they seem to be worse in winter and when there is bad weather" [Commuter, East London]

"London Overground seem to be more subject to disruption when the weather is bad so it can be more volatile" [Commuter, North London]

[22] NB: it should be noted that the focus groups were conducted shortly after London was affected by severe flooding so this may have had an impact on passenger perceptions of service reliability.

7.3 Rolling stock

Characteristics

Attitudes towards London Overground's rolling stock were extremely positive and consistent across the sample. This can therefore be identified as an area of major competitive advantage for London Overground, especially when considering the context of typical journey lengths compared to other TOCs.

London Overground is still seen as a relatively new service provider in the London area. The network is therefore felt to benefit from running a fleet of new trains that provides an obvious point of positive comparison with many other TOCs. Passengers prefer to travel in new trains rather than older ones but favourable experiences are enhanced by the carriage interiors and seating configuration.

"Lots of the trains are new so maybe they make more effort to keep them cleaner. It could be that they are easier to clean because they are more open plan." [Commuter, East London]

Passengers welcome what they consider to be a contemporary design that seems to reflect the needs of users and the way in which the trains are used. The key feature in this respect is the low density longitudinal seating that creates more space for (standing) passengers and easier access for those travelling with prams or bikes. The sense of increased space is enhanced by the walk-through carriage design that has the additional benefit of enhancing perceptions of personal security when travelling alone, especially late at night.

"The trains are pretty spacious so there is always loads of standing room when the trains are crowded. Most of the journey times are short so most people don't really need to sit. I would rather stand than be knee-to-knee with someone" [Leisure user, North London]

"I prefer the seats on London Overground because there is no chance of sitting opposite a dirty old man rubbing his legs against mine and I don't have to stare at anyone. The seat configuration also means there is more space on the train" [Commuter, Euston-Watford]

"There is more capacity on the trains which is good for me when I am travelling with a buggy" [Leisure user, East London]

Passengers considered the provision of air conditioning in the new trains to be a major advantage. Although this is an issue that can polarise views, poor experiences of using overcrowded public transport in London during the summer months mean that this facility is universally appreciated. Additional features that contribute to a positive journey experience are the perception that trains always seem to be clean and the ability to use Wi-Fi and phones on services that are predominantly above ground (although not all passengers consider this to be an advantage).

"The trains are air conditioned which is the best thing ever and you can use your phone on it because you are always above ground" [Leisure user, North London]

The general feeling among users is, therefore, that London Overground trains tend to provide a positive and comfortable passenger experience, even to the extent that journeys can be regarded as a pleasurable experience and looked forward to, in contrast to some of the alternative methods of travelling around central London.

"For leisure purposes, I would always prefer to take London Overground rather than London Underground, even if that means having to go a bit further. You have more space, you get to see things, you can make a phone call, it's more reliable and more fun and not a hateful part of your day" [Leisure user, North London]

"In my mind, London Overground is always better value for money because it's never an un-enjoyable experience, but whenever I use the tube I have to psyche myself up for it" [Leisure user, North London]

"It's a more pleasurable journey on London Overground than the Underground or buses, and overall I think of it as being a less stressful way to travel around London" [Commuter, North London]

"It's a nicer journey experience because the trains are newer and cleaner, and you can use Wi-Fi on the trains. There is more scenery and natural light so it feels more relaxing" [Leisure user, Euston-Watford]

Weaknesses

Negative aspects of the rolling stock were considered by participants to be outweighed by the strengths outlined above. The detractors identified therefore tend not to exert such a negative impact on value for money perceptions as against some of the older trains used by other TOCs that participants have recent experience of travelling on. The main issues highlighted during the focus groups are outlined below.

A small number of passengers consider the seating configuration on London Overground trains to be a disadvantage rather than a strength of the carriage design. This is predominantly due to the fact that having fewer seats in each carriage increases the likelihood of needing to stand for the entire journey at busy times. There is also a perception that each train must have fewer priority seats which could cause a problem for those who have difficulty standing. In order to improve perceptions of passenger comfort and safety, some participants felt that more grab poles should be provided, especially for the benefit of those who are unable to reach the overhead straps.

"I prefer the layout of the carriages but it does mean there are fewer seats which can be a problem at certain times of day" [Commuter, East London]

"Sometimes you can feel insecure if there's nothing to hold on to, especially because the trains tend not to be so packed with other passengers!" [Leisure user, East London]

Some focus group participants, particularly those on the Watford – Euston route where journeys tend to be longer in length, expressed a preference for a seating layout similar to that provided on Metropolitan Line S stock.

"The Met line have a clever mixture of seats along the side and front and rear facing so why that can't be done on London Overground I have no idea" [Commuter, Euston-Watford]

The only other negative aspects of the rolling stock identified were the absence of toilets which can occasionally cause discomfort even on short journeys and the fact that train formations seem to be much shorter than those run by other TOCs which exacerbates crowding problems on certain routes at peak times.

"The journey quality can be worse because there are no toilets on the trains or at stations so it's more similar to the underground. Even though journeys tend to be short, they should have the same facilities as other train companies" [Commuter, North London]

7.4 Stations

The value for money research conducted by London TravelWatch in 2013 indicated that recent high profile investment, especially at some of the larger stations in London, has a positive impact on passenger perceptions of TfL.

On this occasion, however, there was some feeling that the passenger experience of smaller London Overground stations was more likely to have a negative rather than a positive impact on overall passengers' perceptions of value for money. This was by not a consistent or strongly held view, but it was felt to represent a barrier to using London Overground services. It is possible that poor perception in this area is magnified by the contrast with more visible investment in other areas of the public transport network.

It should also be pointed out that the sample was recruited on the basis of the London Overground line they travel on rather than the stations they use. Given that this is a qualitative research project, it could be that these participants are not using a representative cross-section of London Overground stations and therefore have an inaccurate perception based on smaller stations only or those that have not yet been targeted for refurbishment or investment[23].

"Some of the stations are horrible old stations and they haven't spent any money on them. They seem to have concentrated on the big stations and left out the smaller ones" [Commuter, North London]

The issues highlighted during the course of this work can be grouped into the following categories:

[23] However, most passenger journeys on London Overground involve the use both small and large stations. A significant proportion of London Overground stations have been or are in the process of having building works of some form or another which has made them less attractive or easy to use during the construction period. There has also been an issue over the period of the concession with those stations served by London Overground but operated by London Underground and other train operators which have not enjoyed the same level of investment or detailed management attention as those managed by London Overground.

7.5 Access

Passengers are surprised at the proportion of ungated stations across the network since this is considered to be one of the main causes of incomplete journeys when using Oyster PAYG. Given the close association between London Overground, TfL and Oyster in the minds of passengers, some feel that this should be a higher priority as part of a station investment programme and for revenue protection purposes

"Lots of London Overground stations don't have ticket barriers which is a problem if you are using Oyster Pay As You Go" [Commuter, North London]

Passengers are aware that step/gaps between platforms and trains create difficulties with boarding and disembarking for all passengers. Where it occurs, this tends to be an issue with the height of the step rather than due to a gap between the train and the platform. Additional issues arise where trains are longer than the station platforms that they serve and passengers need to walk through the train beforehand to be able to get off.

"It feels more considered because there are no big gaps but at some stations there seem to be some big steps from the train to the platform" [Leisure user, North London]

"A lot of the platforms seem to be raised which is a problem for people with buggies and disabled passengers" [Leisure user, Euston-Watford]

This, together with poor platform train interfaces,[24] can create a negative impression of London Overground stations not being accessible for disabled passengers. Although no wheelchair users or others with mobility impairments were represented in the sample, other participants were able to recognise these usage barriers on their behalf.[25]

"There are fewer carriages than other train companies or the Underground and there is a problem with wheelchair access but I don't know if that is at all stations" [Commuter, North London]

It is recommended that:-

- **further investment in gating schemes on the existing London Overground network and at stations on the West Anglia route should be considered**

- **as a priority, TfL should carry out an audit of steps / gaps at all London Overground served stations with a view to minimising risks to passengers either by physical works or by moving stop board locations.**

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[24] Examples of large step – gaps at London Overground managed stations include Honor Oak Park, Norwood Junction, Willesden Junction (High Level platforms), Stratford (platforms 1 and 2) and stations between Queens Park and Harrow & Wealdstone served by Bakerloo line trains.
[25] TfL carry out a regular 'Mystery Traveller Survey' of accessibility on London Overground.

- **consideration also needs to be made of lengthening platforms at London Overground stations which are served by other operators' trains which are longer than the platform length because of the general transport benefit that would arise from this of reduced dwell times, then reducing the knock on effect on London Overground service reliability and brand degradation as London Overground is the station operator.**

- **TfL should better publicise those London Overground stations that are already fully accessible to disabled passengers and highlight where investment is being made at other stations.**

7.6 Facilities

There was some feeling amongst participants that London Overground stations lack facilities that might be welcomed by rail users, especially in the event of needing to spend time there while waiting for a train. In this respect, stations are considered to be closer to what might be expected from London Underground than a TOC.

The general perception by participants is that stations do not have toilets or adequate waiting areas and are lacking in other facilities that are often associated with other stations such as catering or retail outlets.

"Overall. The service is impressive, clean, efficient and reliable but I think there should be better facilities" [Commuter, North London]

"I think of their stations as being freezing cold and wind-swept and there doesn't seem to be any shelter from the wind-tunnel effect" [Leisure user, Euston-Watford]

It is recommended that TfL examine the feasibility of adding additional toilets and waiting areas at London Overground stations and those on the West Anglia route. Consideration should also be given to creation of retail units at stations where this would not detract from the accessibility or information flow within stations, and the roll out of wi-fi or other similar technology to trains and stations served by London Overground. This should especially encourage catering provision, building on the successful examples already implemented with the benefits to perceived security as well as passenger convenience.

Insecurity and ambience

This is partly a function of the lack of facilities issue and relates to a view expressed among a few passengers that London Overground stations can sometimes feel inhospitable, especially the platform areas of smaller stations.

At a physical level, there is an occasional sense of exposure to the elements when no shelter is available. This can create a feeling of desolation, especially when travelling at a quiet time or waiting at a less busy station when there are few other passengers around.

At an emotional level, this feeling of exposure can translate into a perception of isolation and security concerns, especially in the absence of staff or other passengers.

"I feel more insecure on London Overground at night because the platforms are often empty. You feel more safe when you use the Underground and you are inside" [Leisure user, North London]

It is recommended that TfL investigate the feasibility of providing extended canopies at busy stations[26] to reduce exposure and of providing reassurance that CCTV images are monitored in real time, and that wi-fi[27] provision should be expanded to give greater assurance of mobile phone / device coverage.

7.7 Passenger Information

Previous research, including work conducted for London TravelWatch, has indicated that rail passengers are often dissatisfied with the quality and quantity of information provision from TOCs, especially during unplanned disruption. In contrast, TfL are widely considered to have made recent improvements in this area and London Underground is often considered to represent the benchmark among those who use public transport services in the London area[28].

It could be argued that this situation puts London Overground in a difficult position. Its perceived positioning alongside other TfL brands means that it is more likely to be judged according to expectations of London Underground in terms of information provision rather than by the standards of other TOCs.

"Information on London Overground trains is good because they have LED displays in the carriage and there is not much space in between them and they also have large maps that are clear. You are never straining to see the information you need" [Commuter, Euston-Watford]

"The information seems to be comprehensive and up to date and the staff let you know if there are any problems. I can't fault the stations I use" [Commuter, North London]

The overall performance of London Overground is perceived to fall somewhere in the middle ground defined by these parameters. Information provided to passengers is widely felt to be as good as, or better than, users have experienced from other TOCs, but not as good as might be expected from London Underground.

"If you are stopped on the Underground or London Overground, the drivers will give you information about the delay, but the information provided by other train companies is quite hit and miss" [Leisure user, North London]

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[26] An example would be Crystal Palace platforms 5 and 6.
[27] 56 Stations on London Overground have been fitted with wi-fi under an agreement with The Cloud.
[28] Passenger ticket purchasing and journey experiences.

"On the London Underground, drivers have to tell you what is going on within a certain time limit when there are problems, so I don't know why the train companies can't do the same thing" [Commuter, North London]

As previously mentioned, many participants are using travel apps for journey planning purposes, so it is not surprising that they also turn to these if their journey is disrupted. This has had the effect of raising the bar in terms of the quantity and quality of information that passengers expect to be provided and most TOCs are usually thought to fall somewhat short of passengers' needs in this respect.

"I have an app on my phone, so I often get information from the TfL site which isn't even available on the trains or at the stations I am using" [Commuter, Euston-Watford]

"I don't want to hear excuses, I just want the information to be consistent with what is on my app; they should keep up with each other" [Commuter, East London]

Participants were unable to provide a detailed comparison of their experiences of London Overground compared to all other TOCs in the London area but the general perception is that information tends to be reasonably comprehensive and up to date and any experiences of interactions with staff were recalled as being positive. There is a latent feeling that London Overground benefits from having access to real time information feeding the TfL website and that information about problems should be easier to access due to the nature of the 'self-contained' London Overground network that is less likely to be subject to problems caused by other service providers.

There were, however, instances of participants claiming to have had poor experiences of information provided to London Overground passengers. A couple of users of the East London Line felt that there were less likely to be announcements from drivers than when using other TOCs and that incorrect information had been provided about when a service was due to arrive. In two of the focus groups, participants had been given inaccurate information by staff at Shepherd's Bush on a day when the station was especially busy due to a London Underground strike. Based on these examples alone, it is not possible to conclude that these or any other passengers consider information provision by London Overground to be any different from what can be expected from any other TOC.

"I don't think they do as many announcements as other train companies. You want to be kept informed when there are delays, but you don't always get the details you need" [Commuter, East London]

"There was one occasion at Shepherd's Bush when no London Overground staff could tell me when the next train was to Clapham Junction, whether it would be in the next hour or the next five minutes which was really frustrating" [Leisure user, North London]

TfL and London Overground are recommended to consider further how information is relayed to passengers both on train and at stations, particularly at times of disruption and where there are multiple operators.

This might include looking at the ability to broadcast announcements to stations and trains from a central control in a similar way to that done using the iBus system on the TfL bus network.

7.8 Extending the London Overground network

Towards the end of the focus groups, as part of the brand mapping exercises, participants were asked to envisage London Overground running other train services in the London area and how they would feel about this. The purpose of the exercise is to help understand the positive and negative values associated with the London Overground brand and to assess the extent to which consumers could accept the brand stretching into territory currently occupied by other service operators.

Based on the general response to London Overground during the course of this research, it is not surprising that the suggestion of the brand extending into other areas was positively received among participants. The widespread expectation is that this would be a way of spreading the positive TfL values and satisfaction ratings to services currently run by other TOCs. The hope among rail users is that this would help to address some of the negatives currently attached to other TOCs providing services in the London area and have the effect of improving value for money on these services.

"The frequency of the service is every five minutes whereas Southern is every hour from where I live, so you would expect that would improve" [Commuter, North London]

"It would be good because there would be more consistency and cohesion, and more Oyster advantages so it might be cheaper to use them" [Leisure user, North London]

"I would expect London Overground to invest in another service because they are part of TfL, so there would be better trains, better links with other destinations and hopefully the same cost advantages outside the London area" [Commuter, East London]

However, at a rational level, some reservations were expressed in relation to the extent to which the brand could legitimately be stretched. There is some feeling that this is necessarily constrained by the TfL and London Overground branding. Although many would be keen to see other franchises run by London Overground, there is some concern that the brand essence would be diluted by extending outside the immediate London area. There is also a degree of concern that the brand would lose its integrity as a public service for Londoners if it started to adopt characteristics of some of the TOCs currently operating commuter services in the South East. There is also some concern that the current strengths associated with cost and other service attributes will be eroded if the brand becomes stretched too thin. (Participants thought this even though there are no current plans that envisage this happening, and the current model of rail devolution does not operate in this way.)

"London Overground is more London centric whereas other trains pass on through and don't think of people who live here and have to

do commuter journeys" [Leisure user, North London]

"It wouldn't seem right to be able to get a London Overground train that would go all the way to Brighton" [Commuter, North London]

"I would expect the price to go up because they will run more things so it will be a case of 'like it or lump it'" [Commuter, North London]

"The only bad thing would be if they took over some of the longer routes and you couldn't book in advance any more" [Leisure user, North London]

"It would be a bit confusing at first if it is called London Overground but is providing services outside London, but I suppose people would get used to it" [Leisure user, Euston-Watford]

Some of these views may have important implications for the way in which TfL take over the running of other rail franchises prior to the introduction of Crossrail.

At a strategic level it would be good to ascertain the wider economic and social benefits of the devolved service model. **TfL, the Department for Transport and the Office of Rail Regulation are recommended to commission a wider case study of London Overground to understand these wider benefits, and whether the devolved service model represents better overall value for passengers and taxpayers alike.**

8 Conclusions and recommendations

This research was commissioned to provide more detailed insights into passenger views of value for money provided by London Overground, and helps to provide an understanding of the reasons why London Overground performs relatively well in value for money terms compared to other TOCs providing rail services in the London area.

As expected the results show that there is a high level of satisfaction with the London Overground which is seen as providing good value for money. It is rated well in its' own right but also benefits from a 'halo' effect of being seen as part of TfL rather than National Rail. London Overground is regarded by some as a service run on behalf of the Mayor for public benefit.

This strong association with the TfL brand can raise expectations that a service will be provided more comparable with London Underground with a high service frequency. However, there was an acknowledgement by several people in the focus groups that they already regard London Overground services as being of the 'turn up and go' type. The findings demonstrate that there are a number of dimensions on which London Overground is perceived to be closer to the satisfaction levels achieved by London Underground than other service providers. However, the research also illustrates that value for money ratings may be suppressed or distorted in some cases as a consequence of consumer misunderstanding in relation to status of the London Overground brand and the services running under its umbrella.

TfL's Oyster smart card is also strongly associated with London Overground and viewed as something else which adds value to the service. However, there is an inherent danger here that, if some of the problems passengers continue to experience when using Oyster Pay As You Go are not addressed, this could lead to a lack of trust in the Oyster service as a whole which might have knock-on implications for the standing of London Overground.

Based directly on the immediate research findings London TravelWatch makes a number of recommendations, with key findings set out in points 1-3 below. However it also interpreted some of the findings in the light of other evidence and makes a series of ancillary recommendations as to how London Overground could further improve the value for money it offers to passengers. These are set out in items 4-7, and some further ancillary recommendations in points 8-13.

8.1 Key findings

The key findings and conclusions from this research are as follows:

1. **It is difficult for consumers to make informed comparisons between London Overground and other TOCs.**

London Overground is more readily compared to London Underground than other TOCs. Indeed, many passengers assume that London Overground is part of the London Underground network since it shares similar characteristics and this is an impression that seems to be perpetuated by exposure to rainbow boards and other TfL communications. (Sections 4.1 to 4.3)

2. **London Overground benefits from the 'halo' effect of its close TfL association in value for money terms.**

The perception is that passengers benefit from it being part of a subsidised public service provision rather than suffering at the hands of privately operated franchises. (Section 4.3)

3. **The positive imagery of London Overground is enhanced by being perceived as a London centric service for the benefit of Londoners.**

The advantage of this is that London Overground tends not to be so readily associated with some of the disadvantages that are a more obvious feature of TOCs serving commuters on routes into London (high fares, captive markets, high cost per mile, long journeys, overcrowding, poor journey conditions). The disadvantage is that the current network may imply that there could be future limitations to consumer acceptance and understanding of brand stretch opportunities. (Section 7.2)

8.2 Wider recommendations

The wider recommendations arising from the research are:

4. **The current London Overground brand would benefit from the introduction of more localised 'sub-brands'.**

It is worth noting that London Underground has 'sub-brands' in the form of line names. London Overground, as it has expanded has now reached beyond the original defined lines of its 2007 inception. This has stretched the brand to an extent that participants in the focus groups thought that services attributes would be eroded by further expansion. There is no evidence that expanding London Overground will lead to a diminution of actual services standards. The issue is how consumers understand and identify with the service. The creation of line names within London Overground could counter this and also create more local brand identity where the service expands beyond the immediate Greater London area.

There is a very strong positive passenger association of London Overground providing an orbital service around London. This could be reinforced by the use of line names that emphasise the orbital connectivity of the network. Similarly, on other lines operated by London Overground or as part of the West Anglia route, there are some long established names for routes that could be used to form 'sub-brands' similar to London Underground lines. TfL are therefore recommended to investigate this further with market testing of possible names. It is recommended that in the case of West Anglia a 'brand under construction' strapline might be used during the period of any upgrade works. (Section 7.6)

5. **London Overground also benefits from the close association with the value for money offered by Oyster but there is evidence to suggest that this could be leveraged to greater advantage if PAYG problems are addressed.**

Previous research projects conducted for London TravelWatch have indicated that positive value for money associations with Oyster PAYG are undermined to some extent by awareness and usage difficulties. It is likely that resolving these issues will result in an uplift on passenger satisfaction scores across all TfL brands.

TfL's response to previous research recommendations in this area was to produce a comprehensive fare chart for each London Underground station. It is recommended that similar charts are produced for London Overground operated stations.

As there are discounts available for Oyster railcard holders, it is also recommended that these are better promoted by TfL and that registration of such discounts is made available at London Overground stations. (Section 4.3)

6. **The orbital nature of the London Overground network is a very strong positive attribute of the Overground brand and should be developed and emphasised to a greater extent.**

It is recommended that TfL is more supportive and proactive in evaluating and promoting further 'interchange schemes' that would take advantage of the orbital nature of the London Overground network e.g. West Hampstead Chiltern line platforms, Brixton high level (South London Line) platforms and Brockley high level platforms. (Section 7.2)

7. **Improvements need to be made late evening and weekend services to provide a more consistent off-peak 'turn up and go' customer proposition.**

It is recommended that on existing London Overground lines the hours of operation of standard off-peak turn up and go frequencies is extended until the close of service in the evenings and at weekends – see appendix D for fuller details. (Section 7.2)

8.3 Other recommendations

Other ancillary recommendations are as follows:-

Staffing

8. **Although based on minority views within a relatively small sample, there are indications to suggest that some London Overground staff seem to be less knowledgeable than the stereotype that is often associated with the industry and other TOCs in the London area.**

It is recommended that London Overground staff should receive more customer service training, and be better equipped to deal with queries relating to other TfL and TOC services. This should involve greater familiarisation with other operators' services that have a direct interchange with London Overground. (Section 5.1)

Stations

9. Tackling passenger issues raised by some stations not being fully gated and how this impacts on passenger security and the ability to ensure that there are fewer occasions when an incomplete journey on Oyster Pay As You Go occurs.

It is recommended that further investment in gating schemes on the existing London Overground network and at stations on the West Anglia route should be considered. As a starting point London TravelWatch considers that all stations with a footfall of more than one million passengers per annum should normally be gated stations.

10. Improving the accessibility of trains and stations, and removing large step/gaps between trains and platforms is considered to be a priority by passengers.

It is therefore recommended that as a priority TfL should carry out an audit minimising risks to passengers either by physical works e.g. raising the platform height at Honor Oak Park, or by moving stop board locations.

Consideration also needs to be given to lengthening platforms at London Overground stations which are served by other operators' trains which are longer than the platform length e.g. Sydenham platform 1, Anerley, Penge West and New Cross Gate platform 4.

TfL should also better publicise those London Overground those stations that are already fully accessible to disabled passengers and highlight where investment is being made at other stations. TfL should also more creative ways of getting more stations London Overground stations fully or partially accessible, such as Penge West platform 2 (provide a new entrance and ramp access), Forest Hill platform 2 (provide a new entrance into the Lewisham Council owned car park) or Wandsworth Road replacing the steps to platform 1 with a graded ramp.

11. Station facilities at many London Overground stations are considered to be basic and could be enhanced at reasonable cost

It is recommended that TfL examine the feasibility of adding additional toilets and waiting areas at London Overground stations and those on the West Anglia route. Consideration should also be given to the creation of retail units (especially catering) at stations where this would not detract from the accessibility or information flow within stations, and the roll out of Wi-Fi or other similar technology to trains and stations served by London Overground.

It is also recommended that TfL investigate the feasibility of providing extended canopies at busy stations to reduce exposure and of providing reassurance that CCTV images are monitored in real time, and that Wi-Fi provision should be expanded to give greater assurance of mobile phone coverage.

Information provision

12. In terms of information provision, London Overground seems to perform as well as any other TOC, but may fall short of passenger expectations that are set by TfL.

TfL and Lorol are recommended to reconsider how information is relayed to passengers both on train and at stations. This might include looking at the ability to broadcast announcements to stations and trains from a central control in a similar way to that exercised using the iBus system on the TfL bus network.

Monitoring the effectiveness of the devolved service model

13. The lack of passenger satisfaction data amongst users of stations in London never represented within the NRPS needs to be addressed.

It is recommended that TfL should commission additional NRPS surveying of passengers at the stations served by London Overground and Greater Anglia that have not been surveyed, both before and after the change in concession in 2016. For comparison purposes it would be advantageous to also survey similar stations that will not be included in the new concession arrangements operated by other National Rail train operators in the London area.

14. At a strategic level it would be good to ascertain the wider economic and social benefits of the devolved service model.

TfL, the Department for Transport and the Office of Rail Regulation are recommended to commission a wider case study of London Overground to understand these wider benefits, and whether the devolved service model represents better overall value for passengers and taxpayers alike**.**

8.4 Final notes

It is important to remember that this research was conducted among current users of London Overground only. The views of non and potential users will be interesting to understand in the context of TfL taking over the running of other franchises prior to the introduction of Crossrail.

In this respect, it will be of particular interest to understand the views of those using Greater Anglia trains in the Greater London area, those using First Great Western services between Slough and London Paddington, those using Southeastern services in the London borough of Bexley and on the Crossrail corridor. It would also be desirable to understand the views of current non-users of rail services in these areas to evaluate perceptions of their local service provider and London Overground.

Appendix A - Focus group discussion guide

London TravelWatch – TfL rail value for money
Two hour groups - discussion guide

Introduction

- Introduce self / AECOM / research being conducted for LTW and TfL
- Explain nature and purpose of research
- Outline research agenda and process
- Respondent details: name, age, occupation
- Not including public transport, think of an example of a company or brand that provides very good or very poor value for money and give reasons for this

TOC awareness and usage

- What journeys do you typically make by rail? Is this for commuting / business / leisure purposes? How frequently do you make these journeys?
- Where do you travel from / to? Which stations do you use?
- Which train companies operate on the routes you use? What are the names of the companies? How do you recognise them?
- What options are available to you in terms of train company used? How do you feel about having a choice? What difference does this make to you as a passenger? What impact does this have on the journeys that you make?
- What journeys do you make using London Overground (LO)? What journeys do you make using other train companies?

[Moderator note: ensure all participants are aware of LO as a train operator rather than using this term to differentiate rail from London Underground. Use logo and rolling stock visuals if required]

- How do you decide which train company to use? What are the factors that influence your decision? Which company do you prefer to use? Why?
- What are the strengths and weaknesses of LO? What are the strengths and weaknesses of the other companies you use or could use?

Journey planning information

- What information needs do you have in relation to journey planning and ticket purchasing? Is this for regular or infrequent journeys? Is this for journeys within the London area only or beyond?
- What information sources do you use? Which are best / worst? Which do you trust most / least? Why? Is there sufficient information available to you to make an informed choice?
- How do you feel about the quality and quantity of information available at the rail stations you use? What alternative sources of information are available? Which do you have experience of using?
- What are your perceptions of staff at these stations? How helpful are they? How knowledgeable are they? Have you had any positive or negative experiences?

- Are there any differences between LO and other train companies in terms of information provision for journey planning purposes? Are passengers likely to have different needs from each? What do you expect in terms of information in relation to using other modes in the London area? What about in relation to making journeys outside the London area?

Ticket purchasing

- How much thought do you give to the process of buying a ticket or paying for your journey? What does this involve? What are the considerations for the journeys you make?
- Which channels do you use to purchase tickets (online / F2F / TVM)? What are the strengths and weaknesses of each? Which do you trust most / least? Why?
- Does it make a difference which channel you use in terms of cost or VFM? What are the associations with each in this respect?
- If you wanted to be sure of buying the cheapest ticket for the journeys you make, which channel would you use / avoid?
- How do you know whether to buy tickets on the day of travel or in advance? Can you buy both types through all channels? How much variation is there in the cost?
- How do you know you are making the correct decisions and have bought the ticket best suited to your needs? How confident are you about this? How do you know?

Ticket types and range

- What ticket options are available for the journeys that you make (period pass / Oyster / paper ticket)? What are your views about this range? What are the strengths and weaknesses of each? Are there any gaps?
- Which type of ticket do you tend to use and when? How do you decide? What are the influencing factors? What is most important to you (flexibility; simplicity; cost; VFM; time of day; speed of service etc)?
- Do you have a paper season ticket or is it loaded onto an Oyster card? What is the difference? What are the benefits of each?
- Why do you use daily tickets or Travelcards (Paper or Oyster) or Oyster PAYG? In what circumstances?
- What is the difference in price between Peak and Off-Peak? When does Off-Peak begin / end? How do you know? Is it when you travel or when you touch in with Oyster? When do you normally travel? How does this impact on VFM perceptions of travel?
- What restrictions apply to the different ticket types you use or that are available? How do you know? Where can you find this information? What are the VFM implications?
- Do you expect all ticket types to be available from all rail stations or certain ones from certain stations? Why?
- Do you have any idea of how decisions are made about which tickets are sold at which stations? Do you know who is responsible for making these decisions? Are you interested to know about this as a rail user or not? What are the VFM implications?
- What types of ticket do you expect to be available from LO stations? What tickets should be available from other stations? Do you expect there to be differences in the range available? Why?
- How does the range of tickets available impact on your VFM perceptions of the station or train companies?

Oyster PAYG

- How much does it cost to make journeys? What does this depend on (peak / off-peak; zones; mode etc)?
- Are you aware of the price cap? How does this work? How does this affect VFM perceptions? Is it per day or per week?
- How do you know where / when to touch in and out? How easy is it to locate readers? How well signposted are they? What if you interchange between modes? How does this work? When should you touch in and out during these journeys?
- What happens if you fail to touch in or out correctly?
- Are you aware of incomplete journeys? Why do these occur? How do you know about them? What can you do to resolve these? What has your experience of doing this been? Are you aware of the facility to resolve these online? What do you think of this? Are you aware of the 8 week rule (after which it is not possible to resolve an incomplete journey?
- How does using Oyster impact on VFM perceptions of rail compared to other ticket types?

Value for money

- Do you feel you are getting a good deal on the journeys you make? What is a good deal and how is this defined?
- What does VFM mean in the context of rail travel? How does this compare to other forms of public transport? When do you get good / poor VFM? Give examples using specific experiences of modes / ticket type / operator etc
- What factors exert a positive / negative influence on value for money perceptions?
- Do you focus on the cost of travel only or are associated costs included in the overall VFM equation? (e.g. parking, cost of Oyster card, getting a seat, quality of train)
- How do Season Tickets impact on VFM perceptions? How much do you save? (e.g. 52 weeks for the price of 40 – would it be better explained as a smaller number e.g. 3 for the price of 2,) When does it become worthwhile to have one? Are there any other benefits (e.g. free weekend travel, discounted travel off normal route)?
- What about Railcards? Which do you use? Which would you be eligible to use? How does this impact on VFM perceptions? Are you in favour or not, depending on whether you take advantage of railcards?

[The following questions on child fares and bike policies are only to be asked if either issue is raised spontaneously in any of the focus groups by participants]

- Are you aware of the different child fares that apply to LO and other TOCs? How do you feel about this? How would this affect journey planning and choice of TOC / mode? How does this impact on VFM perceptions?
- Are you aware of the bike policy of LO and other TOCs? How do you feel about this? How would this affect journey planning and choice of TOC / mode? What do you consider to be ideal? How does this impact on VFM perceptions?
- Do the different bike policies have implications for modal integration? Are there any gaps or opportunities for improvement?

Peak spreading

- How does the current fare structure relate to demand for services throughout the day? To what extent does this influence journey planning? Do you know when peak pricing currently occurs? How could this be improved to enhance VFM perceptions among passengers?

- Should Peak / Off-Peak be determined by time of day or demand for services? How would this affect how you would use services differently? How would it impact on VFM issues?
- What would you consider doing to get better VFM (travel off-peak only; travel before 7am; avoid certain zones at certain times of day; purchase online only; buy ticket to stand rather than sit; pay extra to reserve a seat etc)?

Brand issues

- To what extent are VFM perceptions generic rail issues or related to specific train companies?
- Is this an area that passengers will always say represents poor VFM (especially for commuting) or would it be possible to improve perceptions? What needs to be done to achieve this (other than reducing fares)?
- How do you explain the differential between LO and rail in terms of passenger satisfaction with VFM? Is it because LO are good or TOCs are poor in this respect?
- What would TOCs need to do in order to close the gap between VFM perceptions of rail travel and LO service provision e.g. embrace Oyster more fully by being able to resolve queries / add products at station booking offices?
- How do perceptions of the TOCs impact on VFM perceptions at a brand level?
- *[Mapping and ranking exercises using Flashcards]* What are your top of mind associations with any of these brands? Are these based on experiences / perceptions / media stories?
- What is your understanding of the LO logo? What does Overground mean? What is the relationship between TfL, other TfL brands and other TOCs?
- What are the strengths and weaknesses of LO and other TOCs used?
- Which of these brands do you associate with especially good or poor VFM? Explain?
- If TOC X was re-branded as LO, what changes would you expect to notice? What would become better / worse about the service provision?
- If TfL were to take over any of these other operators with exactly the same trains and stations as now, how would that affect your VFM perceptions and expectations?
- What do LO need to do to improve your perceptions of VFM?
- What do other TOCs need to do to improve your perceptions of VFM?

Information provision

- What information needs do you have as a rail user? Is this on a day to day basis or only at times of disruption?
- What do you think about the quality and quantity of information currently provided on the trains and stations that you use? Is there any difference between the different train companies? How do LO compare to others?
- What are your specific needs in terms of information at stations? Explain in terms of display boards, announcements, staff?
- What are your specific needs in terms of information on trains? Explain in terms of information systems, announcements, staff on board?
- What are the strengths and weaknesses of LO vs. other train companies? Have you ever experienced any problems? Where do you think there is room for improvement?

- What would you be happy with in terms of information? What would be better than the current situation in future? What would exceed your expectations and make a real difference to the journeys you make?

Journey experience

[The purpose of this section is to explore aspects of the journey experience to identify factors that exert most impact on VFM perceptions and to identify differences between LO and other TOCs]

- What do you want / expect in terms of facilities to buy tickets? What is your experience of using TVMs? What have you used them for (purchase, PAYG balance / journey history, TOD? How reliable have you found these? Do they always work?
- What are your views on access to stations / transport? What about if you have luggage or a buggy? What about disabled access? What are the best worst examples you have experienced?
- What do you think about the level of staff presence at stations or when travelling? What is the minimum that would be acceptable? What would be ideal?
- What about the quality and quantity of information provided? What are the strengths and weaknesses of LO vs. other train companies? Any problems or room for improvement?
- What are your views on service reliability? What does this mean? How is this defined in the context of commuting or leisure usage? Are you aware of compensation schemes that exist? How do they work? How does this impact on VFM perceptions?
- What about journey time? How consistent is this? How reliable are timetables? Which modes are best / worst? How could stopping patterns be revised to improve the journey experience? Should this relate to numbers of passengers wanting to get on or off?
- What has been your experience of interchanges? Where do problems occur? What should you do if using Oyster PAYG? What could be done to make things better?
- Do you ever use a phone or tablet when travelling? How reliable is the signal and Wi-Fi availability? What room is there for improvement? Would your VFM perception be improved if it was more or less difficult for passengers to use mobile phones?

Passenger environment

[All to be explored of their contribution to VFM perceptions and to understand differences between LO and other TOCs]

- What is your impression of stations and stops? Is there any difference by mode / provider / area? What are the strengths and weaknesses? What sort of environment do you want? What are the hygiene factors? What would surprise and delight? What impacts on VFM perceptions?
- What do you think of the cleanliness of the stations and stops you use? How important is this as part of the travelling experience?
- What facilities should be available? What is the minimum expectation? What would exceed expectations? How does this vary by location / size of station? What do you need in terms of retail outlets? How many? What about catering facilities? What range does there need to be?
- How about provision of shelter and seating? What are the best and worst examples? How does this impact on VFM perceptions? What is most important, availability or comfort of seating? Would you be prepared to compromise on one to get an improvement in the other?

- What is your view on toilets? Are there always toilets available when you need them? What about the condition and cleanliness of them? Would you be prepared to pay (more) to use them to get improvements?

Summary

- What are the key themes that have been identified in relation to VFM?
- What are the factors that have the biggest positive and negative impact on VFM?
- What are the main differences between LO and other TOCs?
- How do information provision requirements differ between LO and other TOCs?
- What is required in terms of ticket retailing from LO and other train companies?
- What would LO bring to other TOCs if they were to take over their operation? How would VFM perceptions be enhanced?
- What could LO learn from other TOCs that would have a positive impact on VFM perceptions?

Appendix B - Focus group composition

The composition of **six focus groups**, each lasting approximately two hours was as follows:

Composition of focus groups - commuters

	Commuters		
Life stage	**Single or double income with no children and young family**	**Young family and older family**	**Older family and empty nesters**
Age indication	18-30	31-45	46-60
London Overground area	East London	North London	Euston-Watford
Other TOCs in scope	Southern Southeastern FCC (South of St Pancras only) South West Trains	FCC (North London) Greater Anglia, Southeastern (HS1) c2c SWT (Richmond / Kew Bridge)	London Midland Southern (North of Kensington Olympia)
Group no.	1	2	3

Composition of focus groups – Leisure users

	Leisure users		
Life stage	**Young family and older family**	**Older family and empty nesters**	**Single or double income with no children and young family**
Age indication	31-45	46-60	18-30
London Overground area	East London	North London	Euston-Watford
Other TOCs in scope	Southern Southeastern FCC (South of St.Pancras only) South West Trains	FCC (North London) Greater Anglia, Southeast (HS1) c2c SWT (Richmond / Kew Bridge)	London Midland Southern (North of Kensington Olympia)
Group no.	4	5	6

Additional Recruitment Criteria

- A mix of both sexes in each group
- All groups BC1C2D
- Groups recruited to be representative of the ethnicity of their local area
- **Commuters** could also make business or leisure journeys
- Commuter groups comprised a mix of those using weekly / monthly / annual passes
- **Leisure users** were not regular commuters or using weekly / monthly / annual passes
- All paid for their own tickets and / or Oyster products (concessions and Freedom Passes excluded)

Appendix C – National Rail Passenger Survey data

The value for money of the price of your ticket

Improved
Unchanged
Declined

% of passengers satisfied/good by sector:
London and South East: 41%
Long-distance: 57%
Regional: 56%

	Improvement/decline in % satisfied or good since Autumn 2012		Improvement/decline in % satisfied or good since Spring 2013		Autumn 2013			
	% change	significant change	% change	significant change	sample size	% satisfied or good	% neither/ nor	% dissatisfied or poor
Arriva Trains Wales	-2	Unchanged	-1	Unchanged	1162	53	20	27
c2c	1	Unchanged	1	Unchanged	1010	47	26	28
Chiltern Railways	-1	Unchanged	3	Unchanged	1028	48	22	30
CrossCountry	-1	Unchanged	3	Unchanged	1163	53	19	28
East Coast	4	Unchanged	6	Improved	1144	62	17	21
East Midland Trains	3	Unchanged	3	Unchanged	1048	52	19	29
First Capital Connect	-1	Unchanged	5	Improved	1402	37	24	39
First Great Western	-5	Declined	-1	Unchanged	2952	47	21	32
First Hull Trains	-4	Unchanged	-5	Unchanged	507	57	22	22
First TransPennine Express	5	Unchanged	6	Improved	931	62	16	22
Grand Central	5	Unchanged	2	Unchanged	581	78	11	11
Greater Anglia	-1	Unchanged	1	Unchanged	2051	36	20	44
Heathrow Connect	0	Unchanged	-1	Unchanged	460	53	21	26
Heathrow Express	6	Unchanged	6	Unchanged	505	46	20	34
London Midland	0	Unchanged	0	Unchanged	1093	52	20	28
London Overground	-4	Unchanged	5	Unchanged	900	53	20	27
Merseyrail	-4	Unchanged	1	Unchanged	411	66	15	19
Northern Rail	-1	Unchanged	2	Unchanged	1118	56	18	26
ScotRail	-1	Unchanged	3	Unchanged	991	52	19	29
South West Trains	0	Unchanged	4	Unchanged	1895	37	23	40
Southeastern	-4	Unchanged	3	Unchanged	1468	34	24	42
Southern	-3	Unchanged	3	Unchanged	2003	39	21	40
Virgin Trains	0	Unchanged	-1	Unchanged	1156	60	18	22

Source: Passenger Focus National Rail Passenger Survey – Autumn 2013

Appendix D – late evening and weekend service enhancements to produce a first to last train turn up and go service

London Overground route:

Stratford to Willesden Junction, daily late evening frequency to be enhanced from every 15 minutes to every 10 minutes. Sunday morning frequency to be enhanced from every 20 minutes to every 10 minutes.

Willesden Junction to Richmond, Sunday morning service to be enhanced to four trains per hour, and late Sunday evening service enhanced from two to four trains per hour.

Willesden Junction to Clapham Junction, daily to run four trains per hour until 2345, instead of until 2230 Monday to Saturday and 2200 Sunday.

Euston to Watford Junction, daily to run three trains per hour after 2200 instead of two trains per hour

Gospel Oak to Barking, daily to run four trains per hour after 2200 instead of three trains per hour.

Dalston Junction to West Croydon, daily to run four trains per hour after 2200 and on Sunday mornings instead of two trains per hour.

Dalston Junction to New Cross, daily to run four trains per hour after 2200.

Highbury & Islington to Crystal Palace, to run four trains per hour on Sunday mornings instead of two.

Highbury & Islington to Clapham Junction, daily to run four trains per hour after 2200 and on Sunday mornings. (Any service to Battersea Park to provided outside of the standard service pattern as an additional service).

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