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London Rail Users

Debrief: How do National Rail passengers feel about the future needs of public transport in London?



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Background and methodology



The research objectives can be divided into three broad themes

Priorities for Performance

- Given the necessary trade-offs London rail will have to evaluate, what priorities do passengers hold?
- Can increased capacity offset reduced frequency?
- Is the TfL ambition of four trains per hour minimum seen as sufficient, necessary or worthy of prioritisation?
- What does reliability mean in a London rail context? How have priorities changed since the COVID-19 pandemic?
- How can timetabling support and enable a high-performance, reliable rail service?
- Are passengers aware of changes, improvements or campaigns around London rail over the past 18 months?

Accessibility of Transport

- **How do disabled transport users experience London's rail system?**
- Is the network, as a whole, seen as physically accessible?
- In terms of **proximity to stations**, frequency and reliability, is rail seen as a viable option for all passengers? If not, who is losing out and why?
- What is the impact of inaccessible services (both for disabled and non-disabled users)? What **alternatives** do they evaluate?
- What impact can **timetabling** have on the accessibility of London rail transport?

Choice

- How do London's rail users evaluate and **judge** their choices when it comes to travel?
- Do they see themselves as having a choice in the first place?
- **How important is modal choice?** Merely a 'Plan B' or something more fundamental?
- What factors go into the choices transport users make? Cost, convenience or something else?
- **What is the ideal offering**– would passengers accept less choice if their sole option performed sufficiently well?
- Are passengers aware of the choices they have?

Our research method in detail

Focus groups

Illuminas conducted 12 focus groups with rail users to establish their current priorities and needs for the rail system in and around London

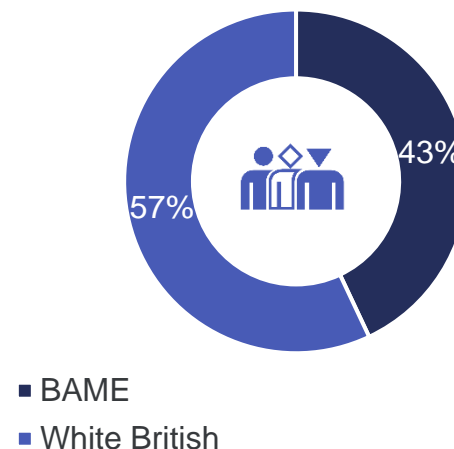
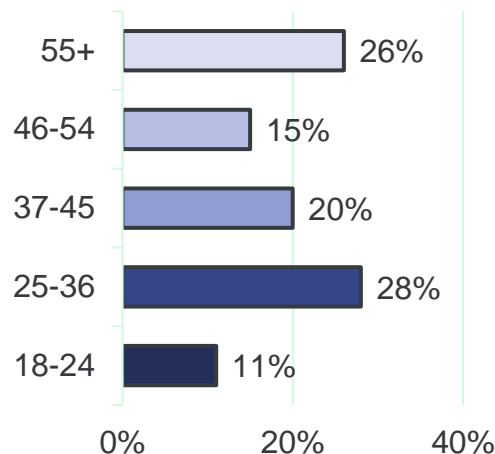
Vulnerable depth interviews

In addition, 10 vulnerable passengers with long-term health conditions were interviewed individually to understand their unique perspective and ensure the research was inclusive

Quantitative Research

Illuminas conducted a survey of 600 rail users in and around London to validate and nuance the conclusions found in the qualitative research, as well as to more robustly measure inequalities and differences in opinion. An additional survey run by London Travel Watch netted an extra 291 responses resulting in 891 respondents (887 when weighted)

Who did we speak to in our quantitative research?



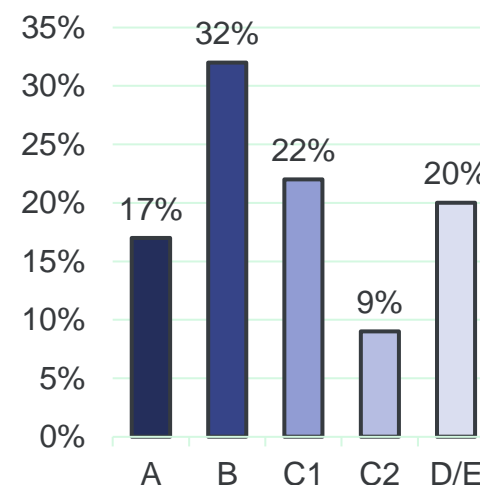
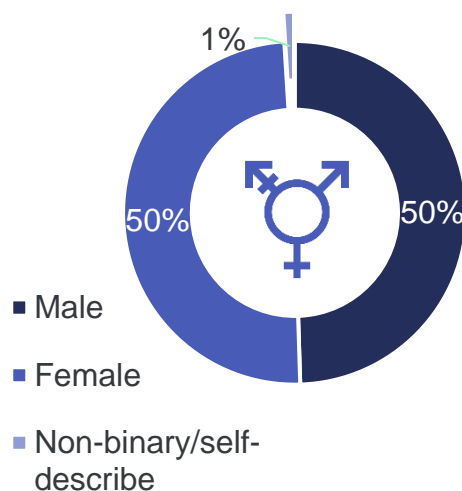
19% of respondents identified as having a disability

Of those...

32% of respondents identified as having a mobility condition

40% of respondents identified as having a chronic illness or long-term health condition

32% of respondents identified as having a mental health condition



887

15-minute online interviews with transport users in London

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Modes of
transport used,
purpose and
frequency of
journey



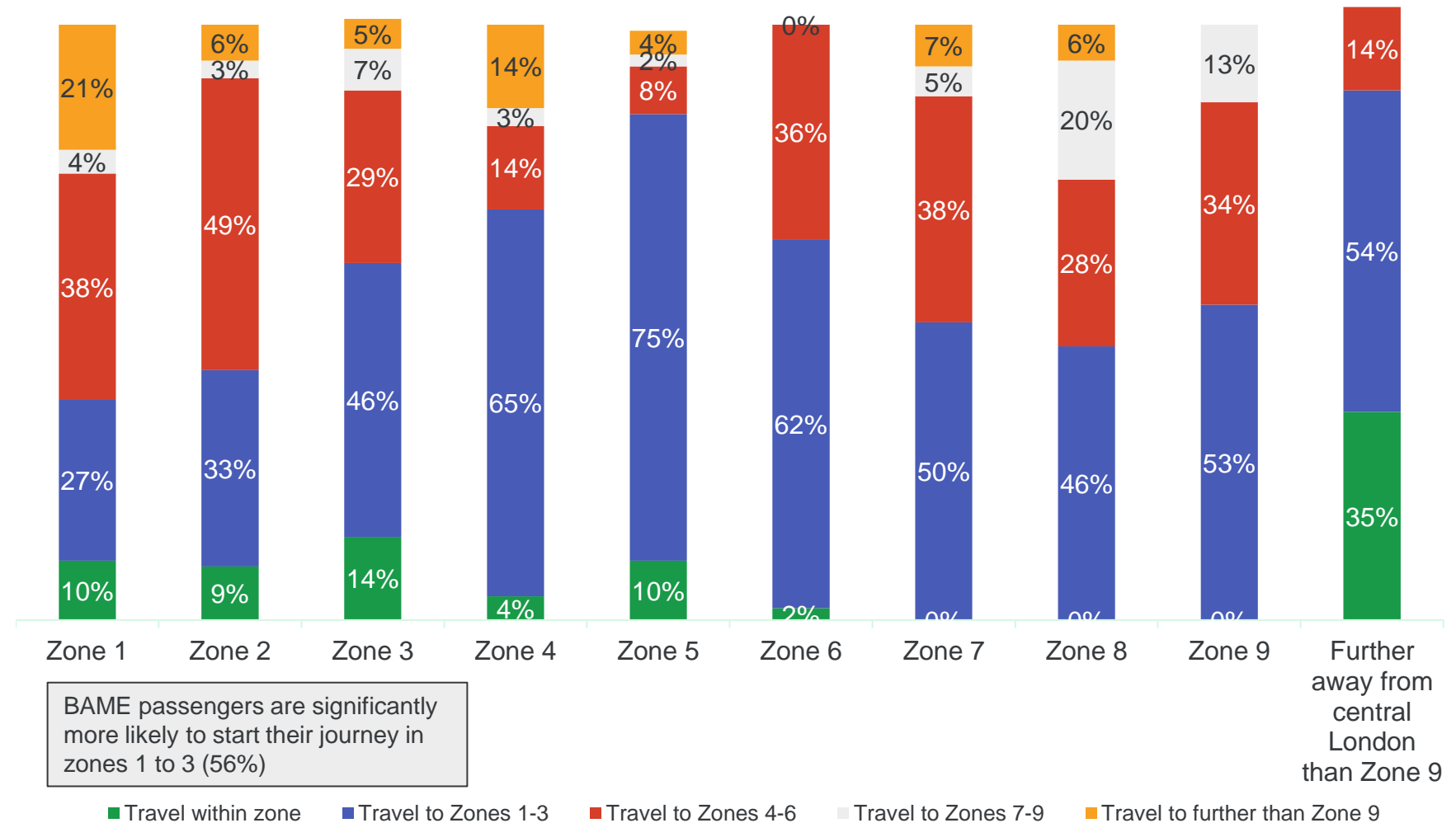
Summary

Commuting remains one of the key reasons for use of trains, particularly when compared to other modes

- 46% are using National Rail to travel to and from work. Just over a third are commuting using either bus (42%) or walking (35%)
- Looking at journey purpose by age and disability 18 to 24 year olds, those aged 55+, and disabled passengers are more likely to be Using National Rail for leisure purposes than commuting to work
- Black cabs, private hire vehicles and motorcycles are used more for business trips than other modes of transport (17%, 21% and 26% respectively), while cars are primarily used for leisure purposes (62%)
- Looking at journey patterns within and between zones reveals that:
 - those within zones 4-6 are most likely to be travelling to zones 1-3, while the reverse is true of those in zones 1-3 with the exception of zone 3.
- A fifth (21%) of those in zone 1 are travelling to further out of central London than zone 9.
- Very few respondents lived in zones 7, 8, or 9. A greater proportion live further out than zone 9; a third of this group are only travelling locally, while half are travelling to zones 1-3.

Those within zones 4-6 are most likely to be travelling to zones 1-3.
A third (35%) of those further out than zone 9 are only travelling within this area

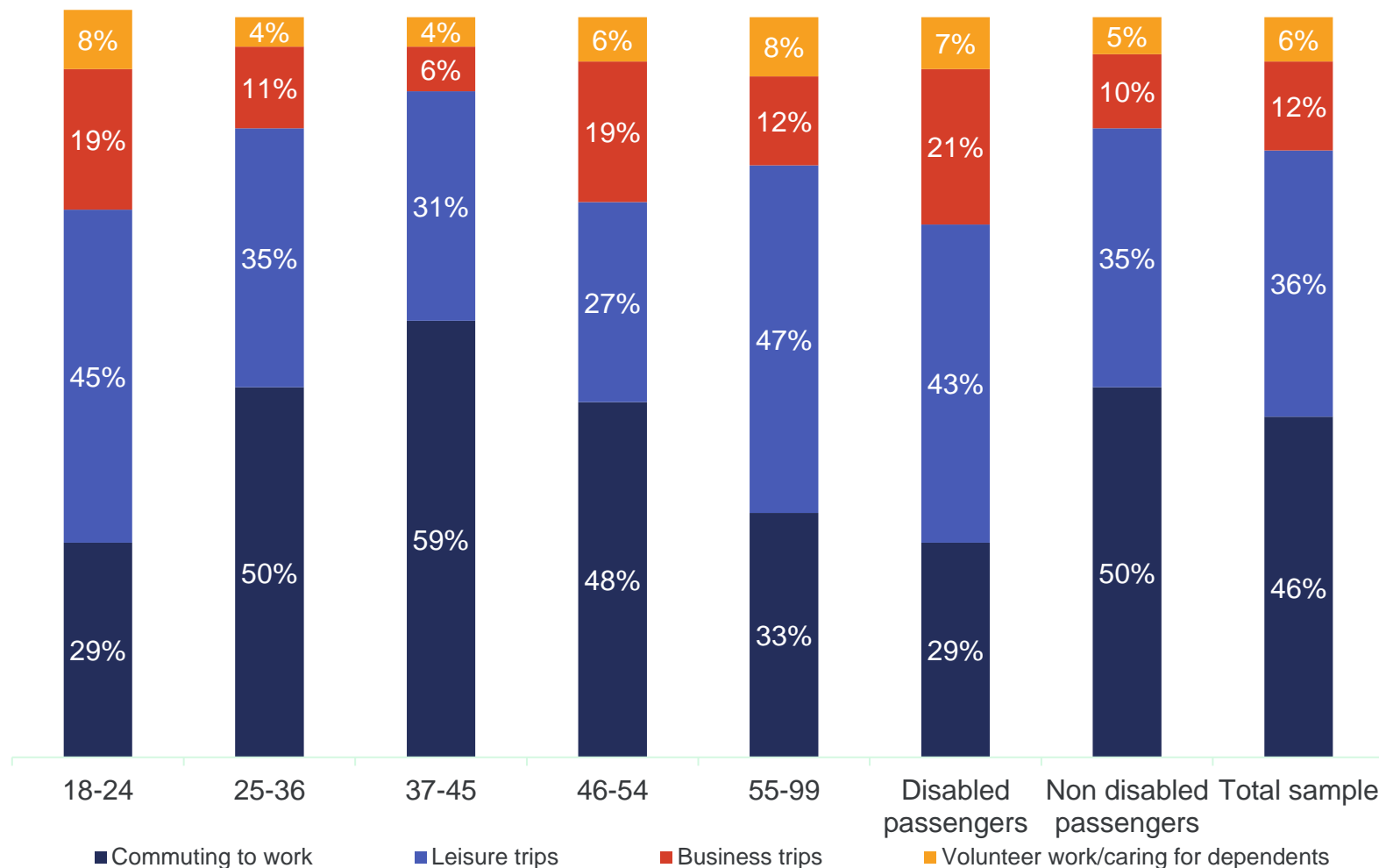
Journey patterns within and between zones



QS9a. Thinking about the journey you make [IF LAPSED: made] on National Rail most frequently (again thinking about the last three months), from which fare zone do you begin your journey and end? QS9b - And on that journey, in what fare zone does/did the journey end? Base: Zone 1 (334), Zone 2 (108), Zone 3 (57), Zone 4 (60), Zone 5 (43), Zone 6 (47), Zone 7 (22)*, Zone 8 (12)*, Zone 9 (9)* Further away from central London than zone 9 (50) * LOW BASE SIZES

A higher proportion of 18 to 24 year olds, those aged 55+ and disabled passengers are more likely to be using National Rail for leisure purposes rather than commuting to work

Purpose of journey



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Satisfaction with National Rail, trains, and train companies



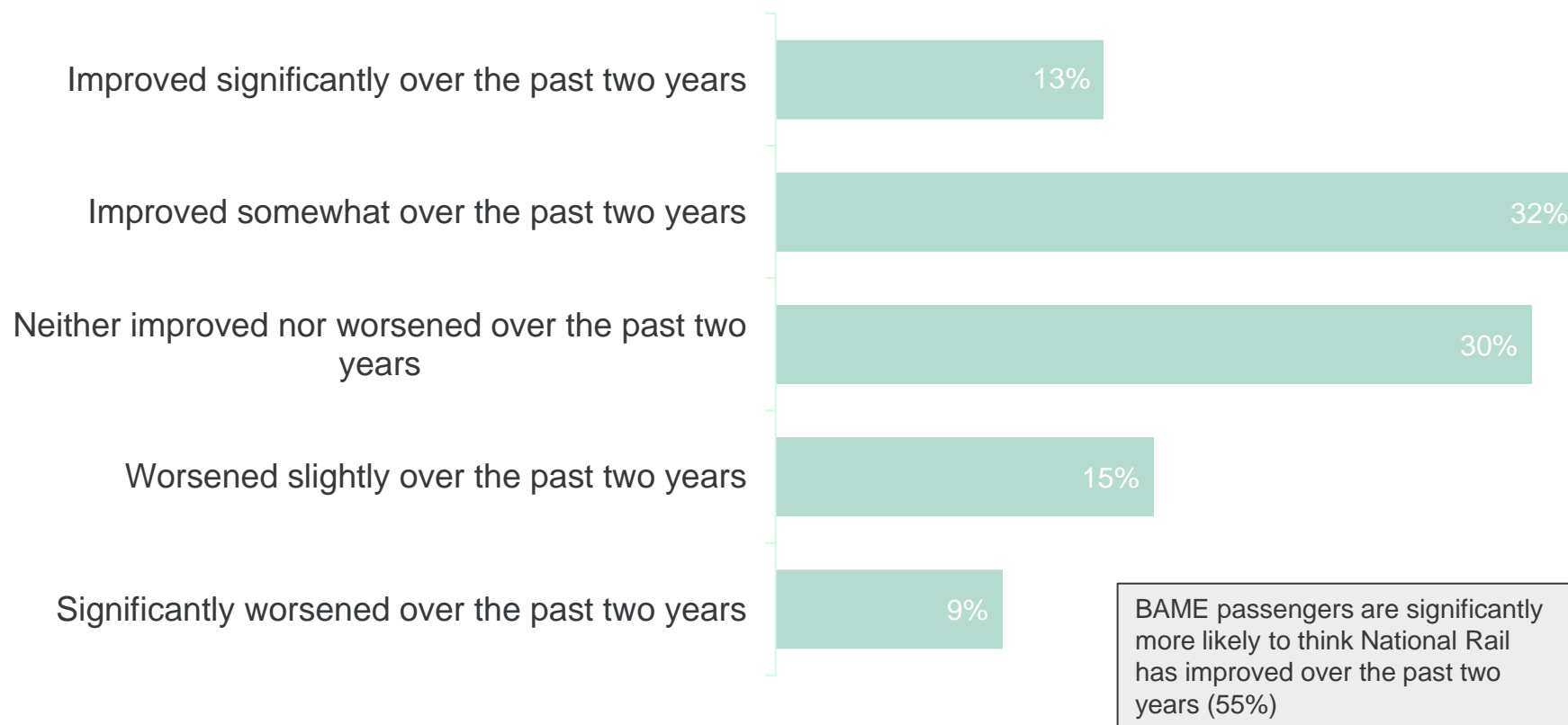
Summary

Punctuality and frequency of trains are recognised as sufficient. A sentiment that was echoed in the qualitative research

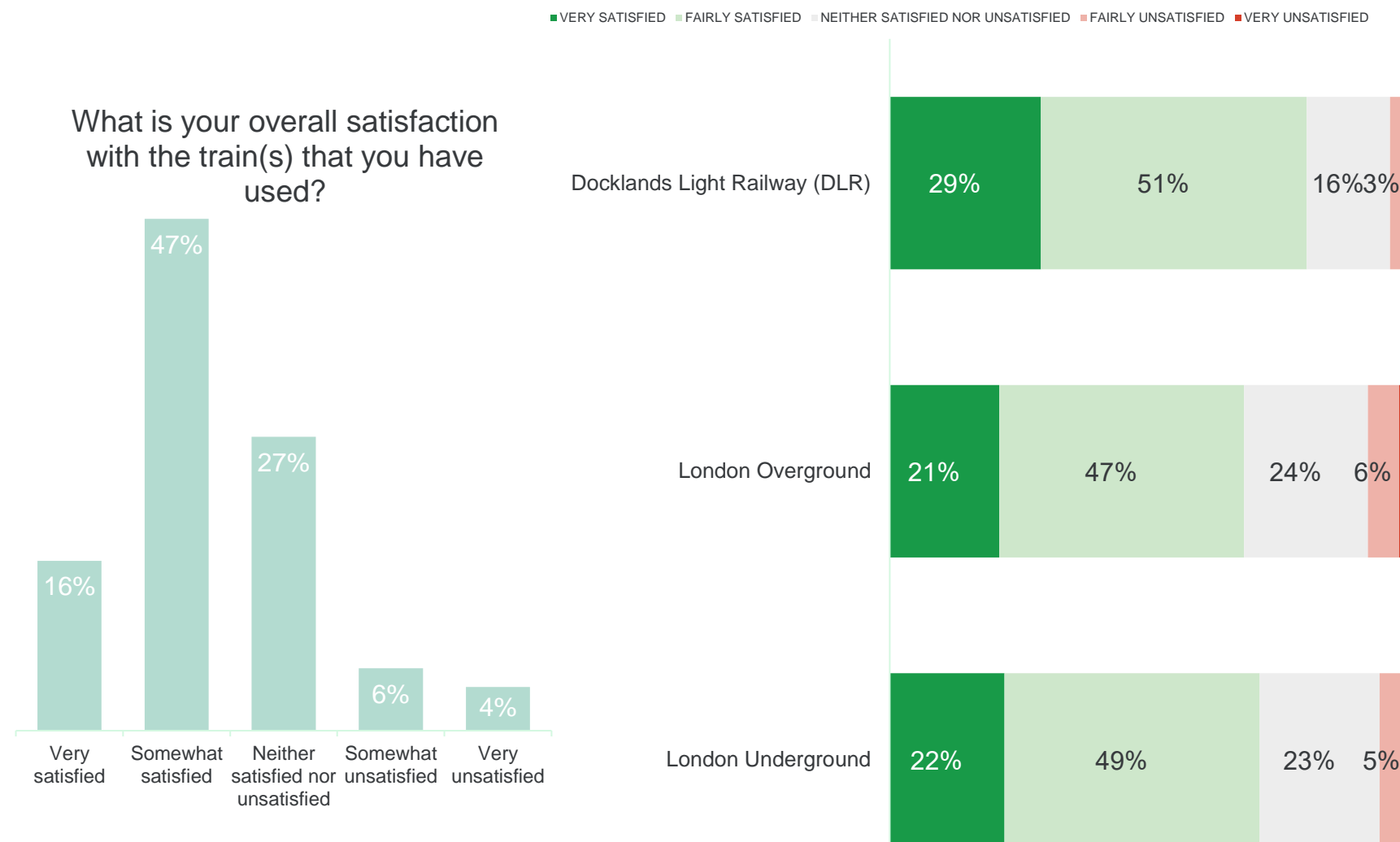
- Almost **two thirds (63%) of respondents are satisfied** with the trains that they use, and **45% feel that services have improved** over the last two years. A further 30% feel they have neither improved nor worsened.
- Looking at individual service providers, **overall satisfaction is relatively high for DLR, London Overground and London Underground** with very few dissatisfied.
- Speed, accessibility, punctuality, and frequency are all rated highly. However **value for money remains a sticking point**, with only just over a third (39%) satisfied and a third (32%) dissatisfied. There is also thought to be room for improvement for **how well train companies deal with delays; only 37% are satisfied with this**.
- Satisfaction with facilities on the train is broadly uniform, with over half satisfied with the helpfulness of the staff, cleanliness, the upkeep of the train, and comfort. **Satisfaction with level of crowding is somewhat lower** compared to other facilities but almost half (45%) remain satisfied with this.
- **Satisfaction is also relatively consistent for station facilities** with two notable exceptions – facilities for car/bicycle parking and toilet facilities. Lower satisfaction for car parking can be explained by the fact that almost half say they are neither satisfied or dissatisfied with this as presumably they do not use these facilities and thus are unable to rate them. There is much clearer dissatisfaction with toilet facilities with 38% dissatisfied with these.

45% of respondents believe National Rail services have improved over the past two years

When it comes to National Rail services in and around London, do you feel as though they have...



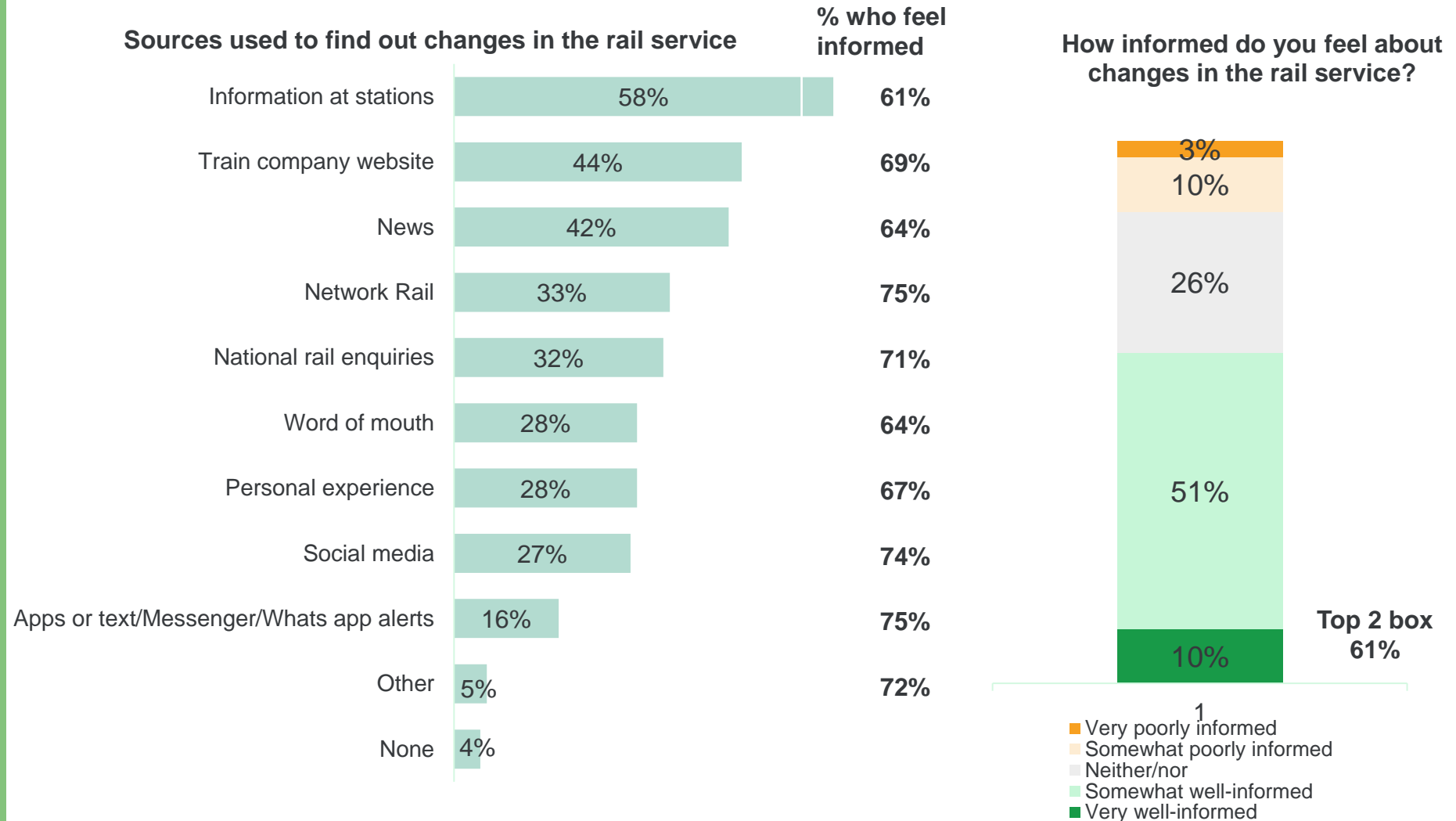
Overall, respondents tend to be satisfied with the trains they use



QA5. And what is your overall satisfaction with the train(s) that you use(d)? Base: Total (887)

QA6. And, in addition, what is your overall satisfaction with the [London Underground/DLR/London Overground] service(s) that you use? Base: London Underground (587) London Overground (373) DLR (223)

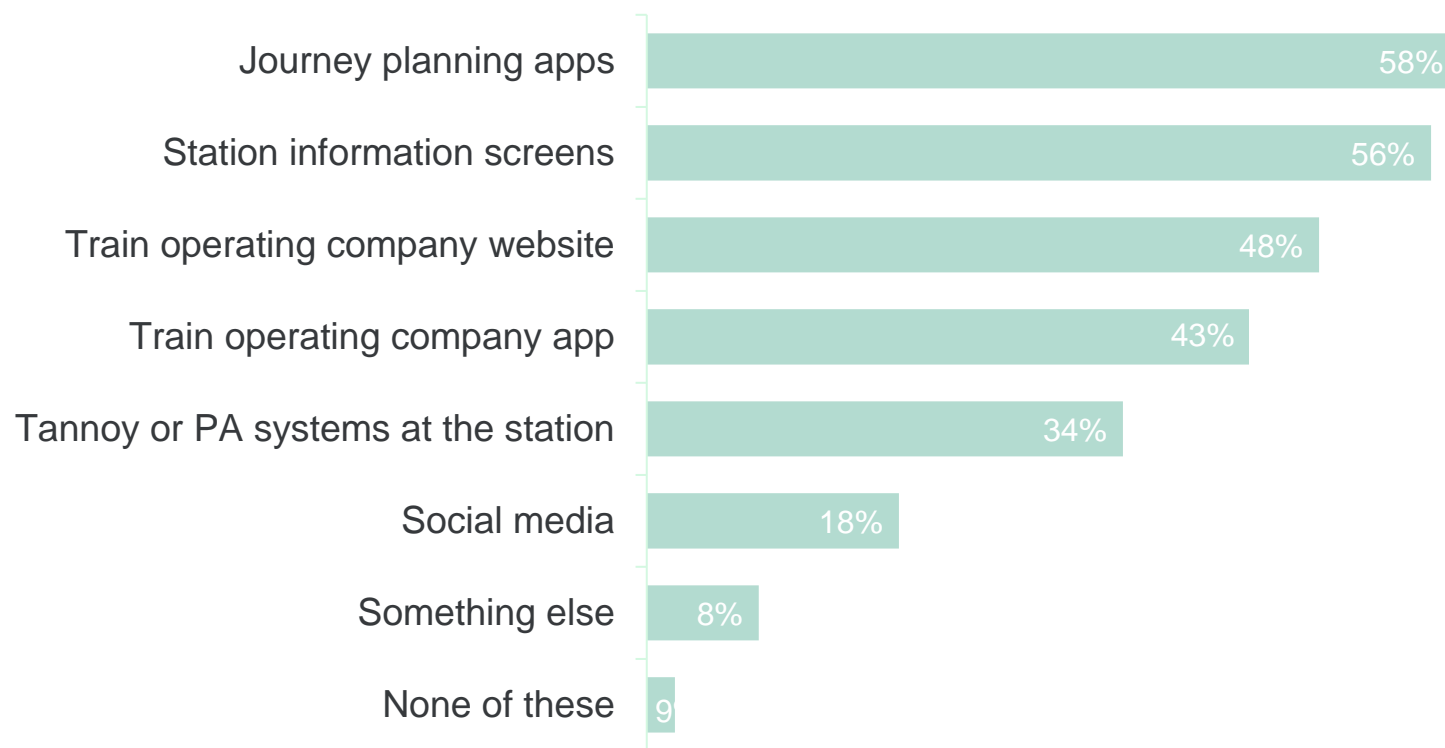
Information at stations is the most widely used source for information about changes and developments to rail services followed by train company websites; 61% feel well informed about changes in the rail service



QB3. How, if at all, do you find out about changes or developments to your rail service? QB4. How well-informed do you feel about changes or developments in the rail service in London? Base: Total (891)

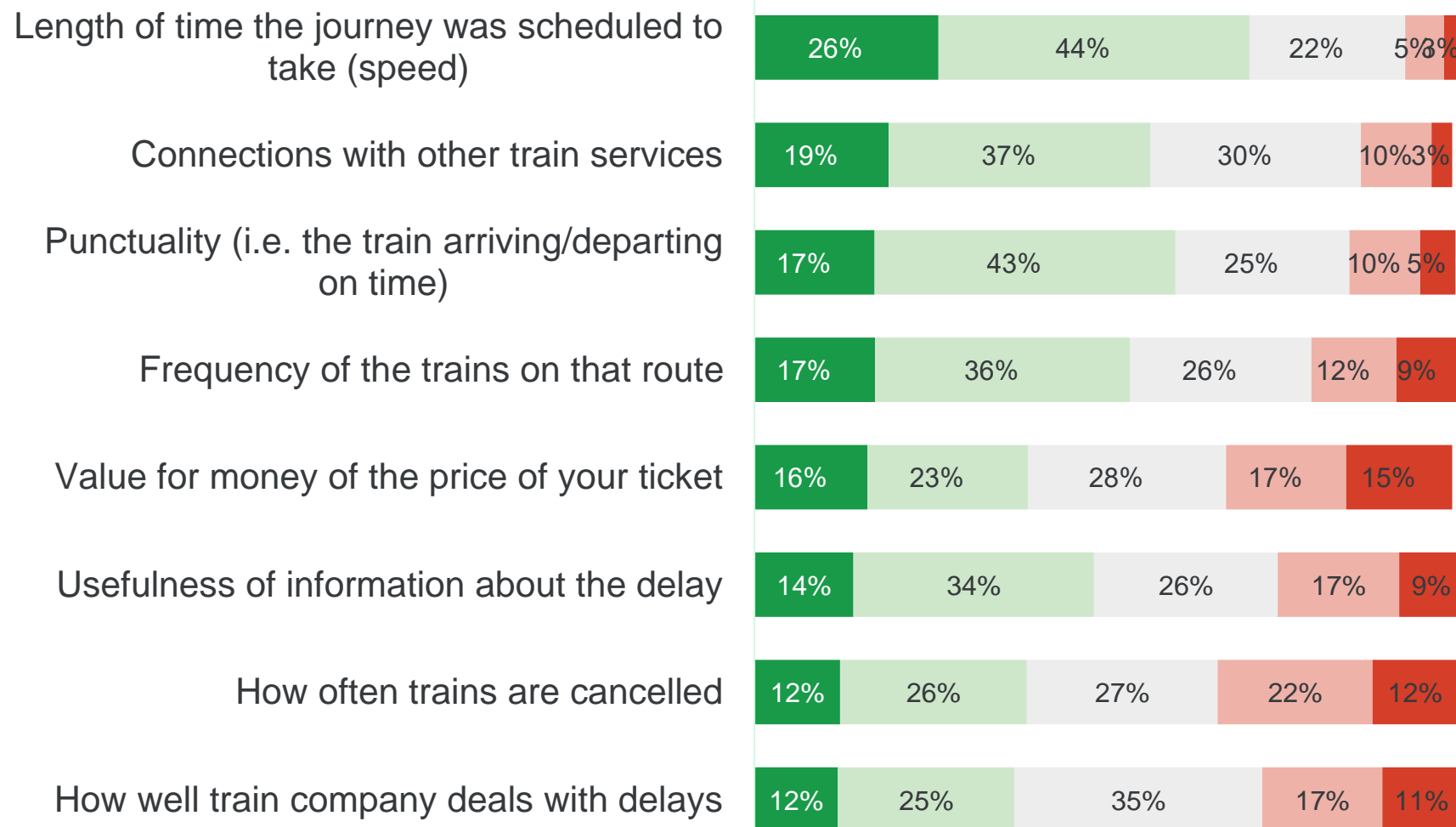
Journey planning apps such as Traveline, Google Maps or CityMapper are used by over half (58%) as a source of information, followed by station information screens (56%)

Do you use any of the following to access information about National Rail when it comes to your journeys?



Speed, accessibility, frequency and punctuality are all rated highly, value for money and how well train companies deal with delays less so

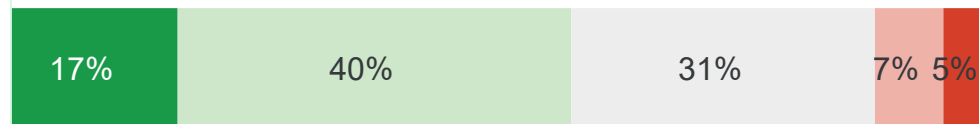
■ VERY SATISFIED ■ FAIRLY SATISFIED ■ NEITHER SATISFIED NOR UNSATISFIED ■ FAIRLY UNSATISFIED ■ VERY UNSATISFIED



Satisfaction with train facilities is broadly uniform with the exception of level of crowding, which is slightly lower but still remains reasonable

■ VERY SATISFIED ■ FAIRLY SATISFIED ■ NEITHER SATISFIED NOR UNSATISFIED ■ FAIRLY UNSATISFIED ■ VERY UNSATISFIED

Helpfulness and attitude of staff on train



Cleanliness



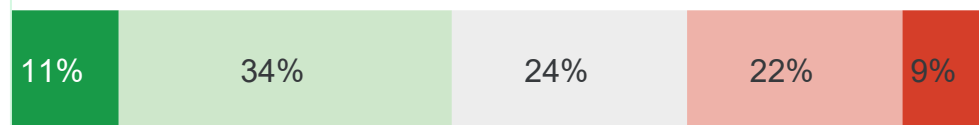
Upkeep and repair of the train



Comfort

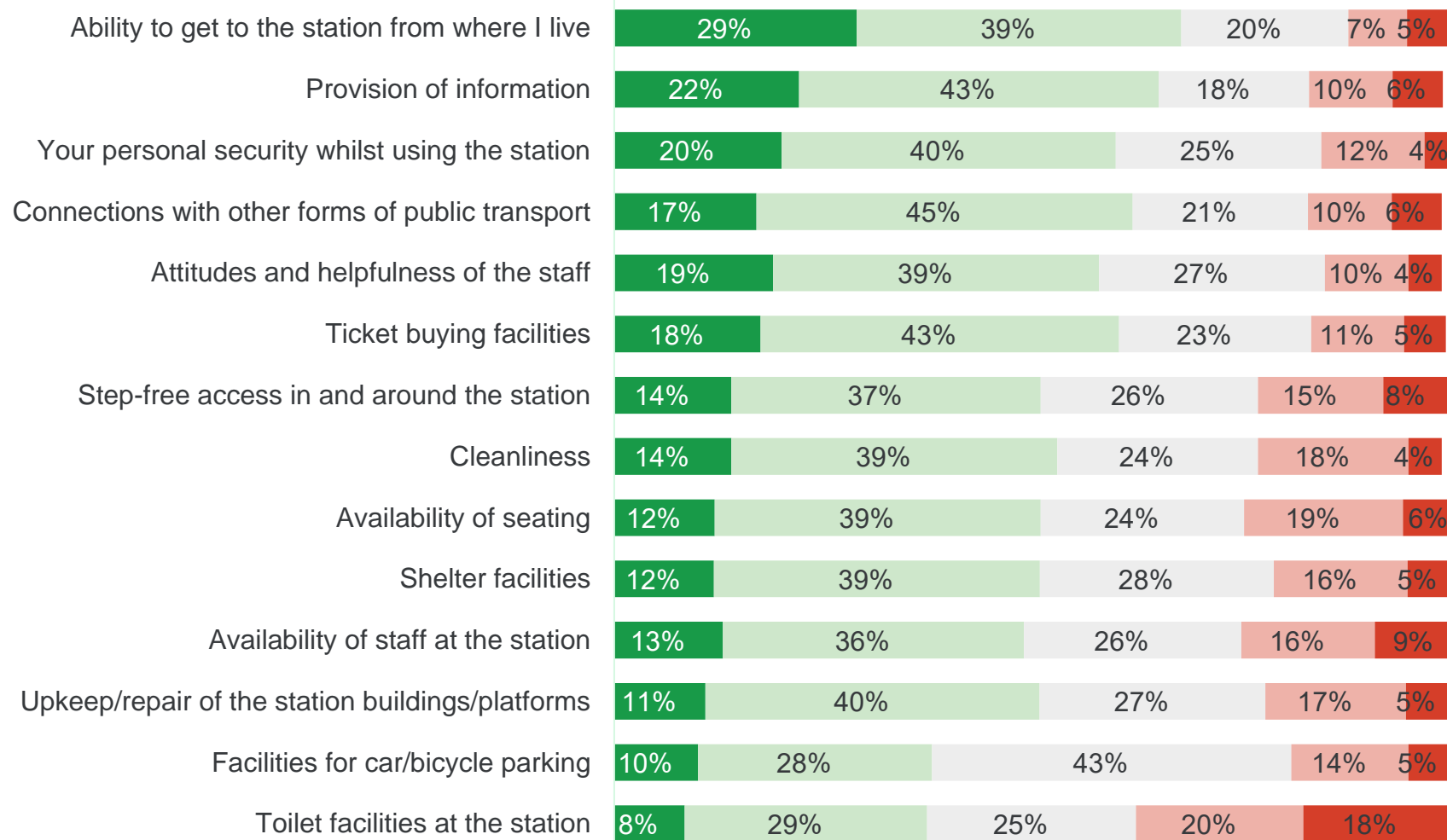


Level of crowding



Satisfaction is also relatively consistent for station facilities with two notable exceptions – facilities for car/bicycle parking and toilet facilities

■ VERY SATISFIED ■ FAIRLY SATISFIED ■ NEITHER SATISFIED NOR UNSATISFIED ■ FAIRLY UNSATISFIED ■ VERY UNSATISFIED



Disabled passengers are significantly more likely to be very dissatisfied with connections with other forms of transport (17%) and step-free access (18%)

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Timetabling, accessibility and choice



Summary

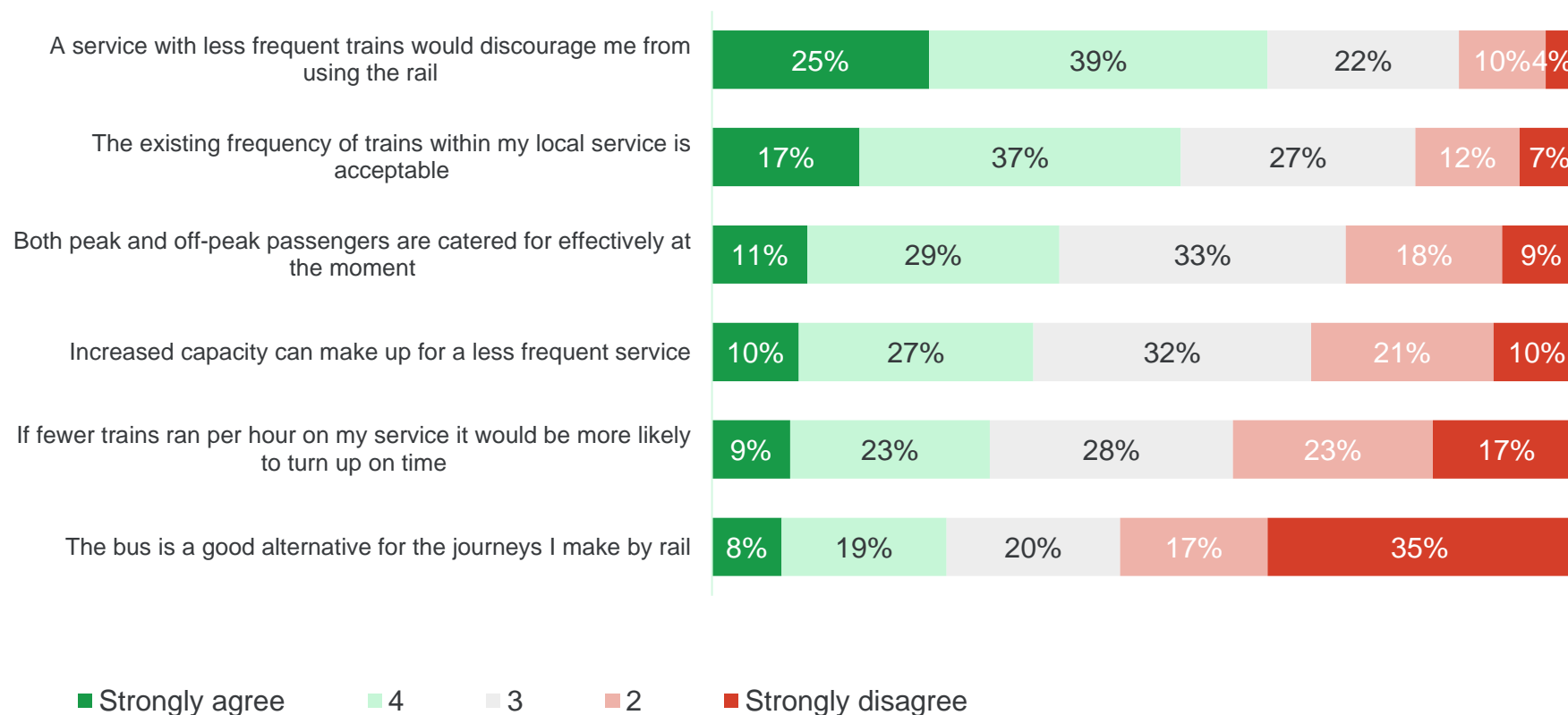
Passengers, at least at first, are not desperate to see substantial changes to London's rail provision – it is seen as 'good enough'

- The qualitative research suggested that passengers essentially hope for 'more of the same', a sentiment which is echoed in the quantitative research - **54% feel that the existing frequency of trains within their local service is acceptable**, while half are happy with their current timetable and feel nothing needs to change.
- This resistance to change is particularly strong when it comes to potentially reducing the frequency of trains. **64% agree (a quarter strongly) that a service with less frequent trains would discourage them from using the rail.** Almost a third disagree that increased capacity can make up for a less frequent service (31%) and 4 in 10 disagree that if fewer trains ran per hour on their service it would be more likely to turn up on time (40%).
- However, **they do not want to see the current timetable maintained at the expense of reliability and punctuality.** When asked about their preferred approach to timetabling less than a quarter (21%) chose this option, with almost half preferring instead an approach with roughly the same number of trains per hour regardless of the time of day.
- In the qualitative research there was very little call for changes to timetables as a result of changing working patterns; most assume that on days when commuters do go into the office, they will do so during conventional peak times. This is supported by the exercise in which respondents were allowed to allocate a percentage to the number of trains they would put on at certain times of the day – unsurprisingly **the highest number were allocated during the peak commuting hours of 6- 9 a.m. and 3 - 6 p.m.** That said, **56% think changes to working patterns might mean that commuter services are less important** than before the pandemic.
- It is also important that **those who live outside of central London do not feel they are less of a priority compared to other passengers;** 43% of those who live further away from central London than zone 9 disagree with the statement 'People who travel from within London for work are the most important user group to focus on when it comes to investing in rail and providing services'
- As in the qualitative research **buses are not considered a good alternative to rail;** only a quarter agree with this idea while over half (53%) disagree.

BAME passengers are significantly more likely to agree that 'the bus is a good alternative for the journeys I make by rail' (34% agree). This is probably because they are significantly more likely to start their journey in zones 1 to 3 (56%) with ready access to buses compared to other zones that are further out

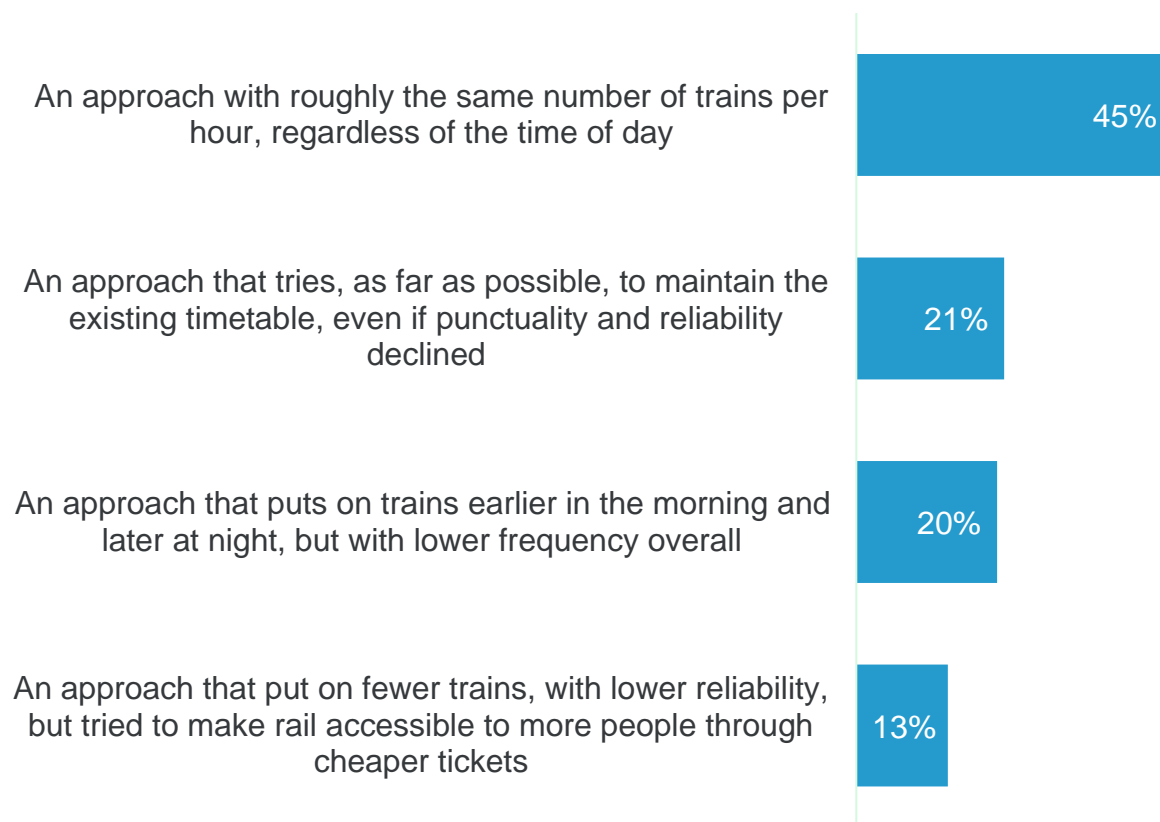
Highest levels of agreement with the idea that a service with less frequent trains would discourage people from using the rail. Bus is not considered a good alternative to rail

Statements regarding timetabling

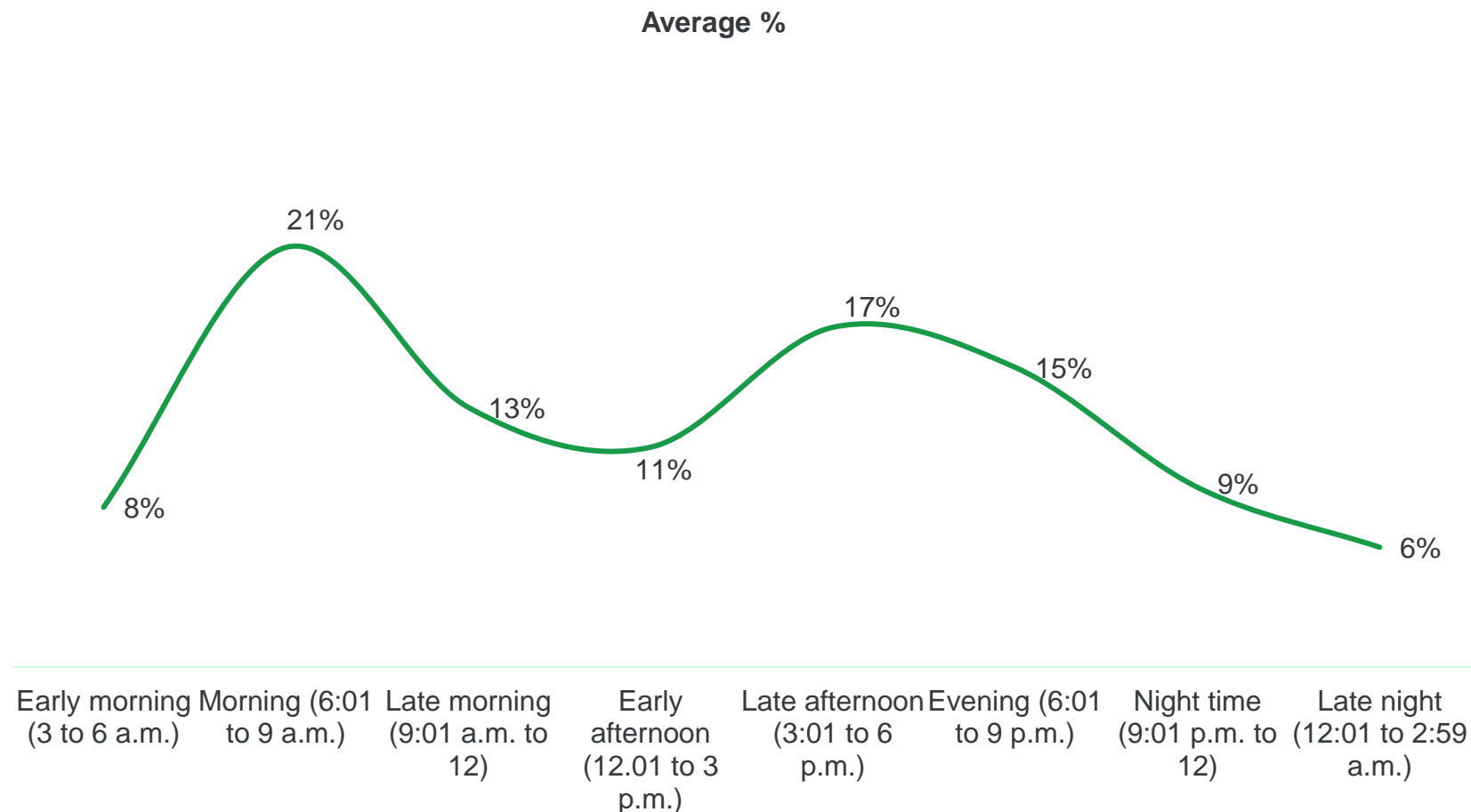


Almost half of respondents would prefer to see the same number of trains irrespective of time of day. There is very little appetite for reduced timetabling even with the benefit of cheaper tickets

Preferred approach to timetabling

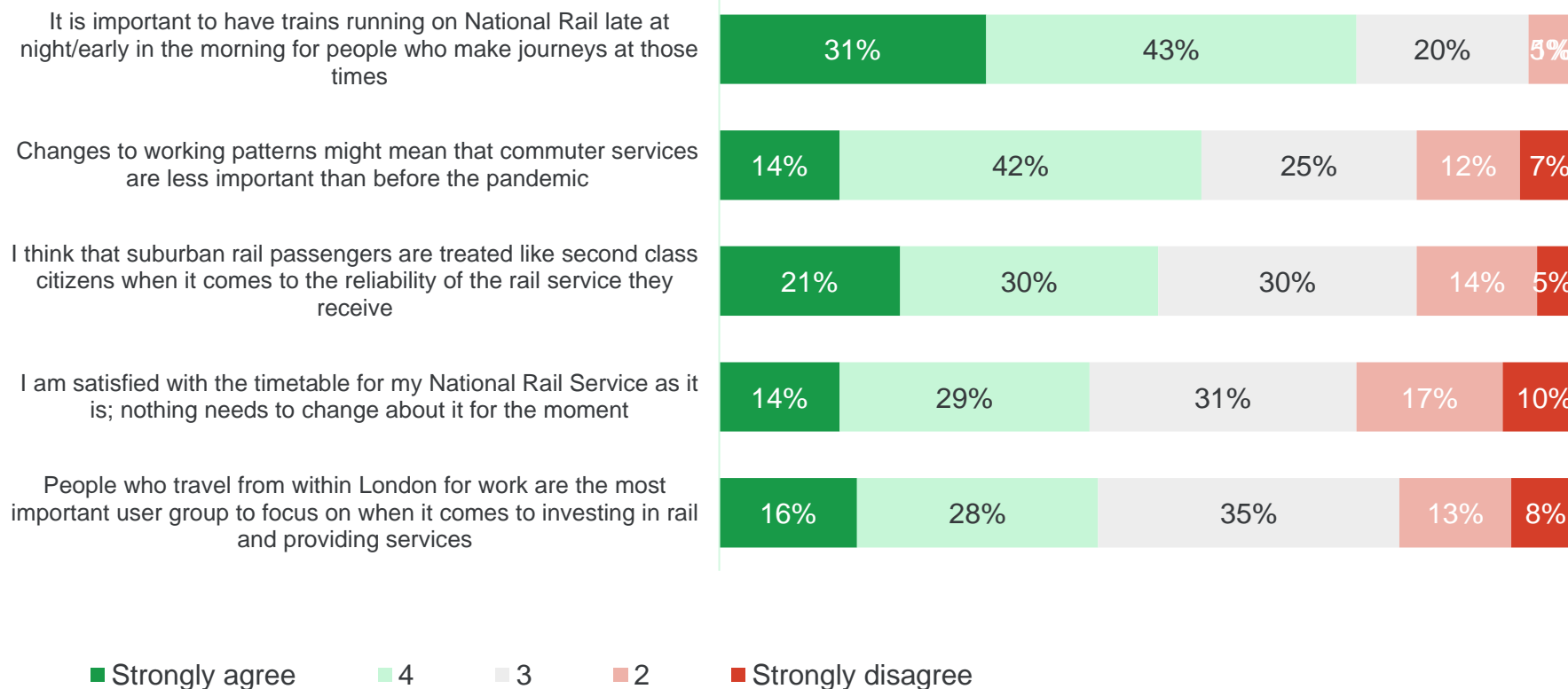


The preferred timetabling is for an increased number of trains in the peak commuting times of morning (6 - 9 a.m.) and late afternoon (3 - 6 p.m.)



Strongest levels of agreement that trains need to run late at night/early in the morning for people who need these services. Almost half are satisfied with the timetable for their current service (43%)

Statements regarding timetabling



43% of those who live further away from central London than zone 9 disagree with the statement 'People who travel from within London for work are the most important user group to focus on when it comes to investing in rail and providing services'

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Trade offs



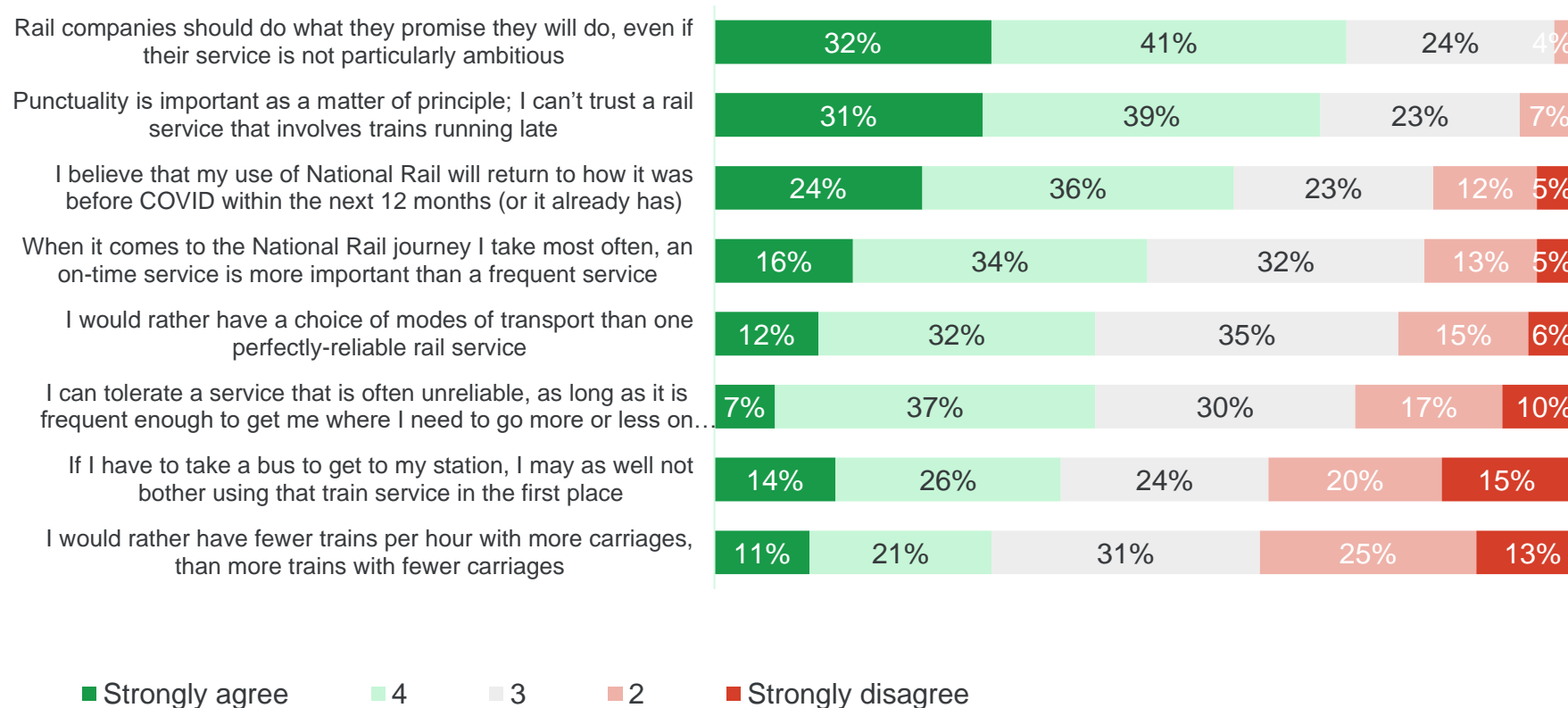
Summary

As observed in the qualitative research, punctuality and reliability are seen as paramount

- Over **two thirds (69%) agree with the statement ‘Punctuality is important as a matter of principle; I can’t trust a rail service that involve trains running late’**. A further **72% agree that rail companies should do what they promise**, even if their service is not particularly ambitious.
- **Opinion is split on whether passengers would rather have fewer trains per hour with more carriages or more trains with fewer carriages** – 31% agreed with this, while 38% disagreed.
- **A majority (60%) believe their use of National Rail will return to how it was before Covid** within the next 12 months or already has.
- Looking at the Max Diff exercise reinforces the importance of **reliability as it has a preference share of 24%, followed by cost at 23%. Punctuality is lower down the list but is still seen as important**. Less so are speed, number of destinations or areas served, connections with other trains or mode of transport, and ease of accessing rail services; ‘network sufficiency’ only accounts for a preference share of 14%.
- Looking at the Max Diff exercise by age, **cost is more important than reliability to 18-54 year olds**. For older passengers aged 55+ reliability is much more important than cost, while maintenance of infrastructure is more important to this age group than others.

Punctuality and reliability is key, particularly as 6 in 10 agree that their use of National Rail will return to pre-Covid levels in the next 12 months (or already has). 42% disagree that they would rather have more trains per hour with fewer carriages

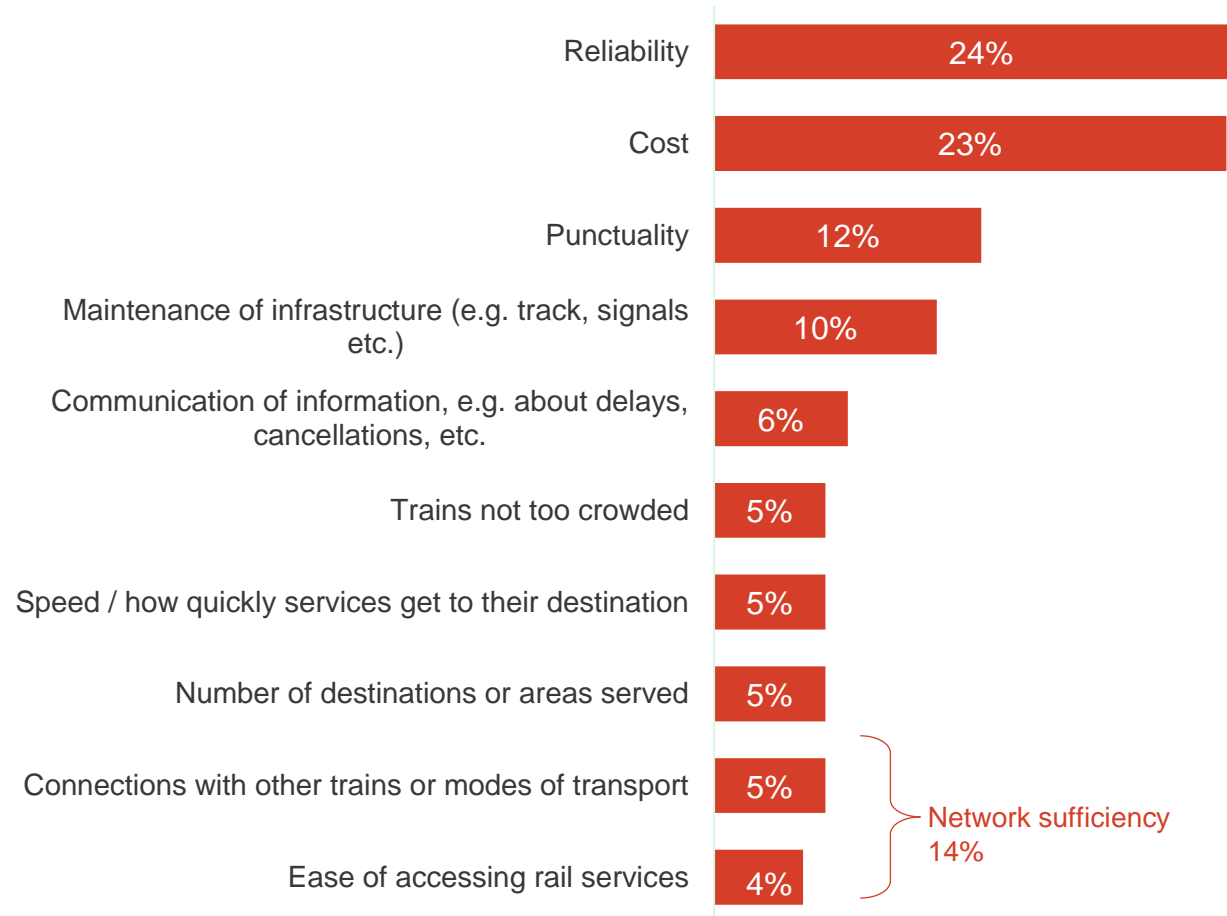
Statements regarding National Rail trains



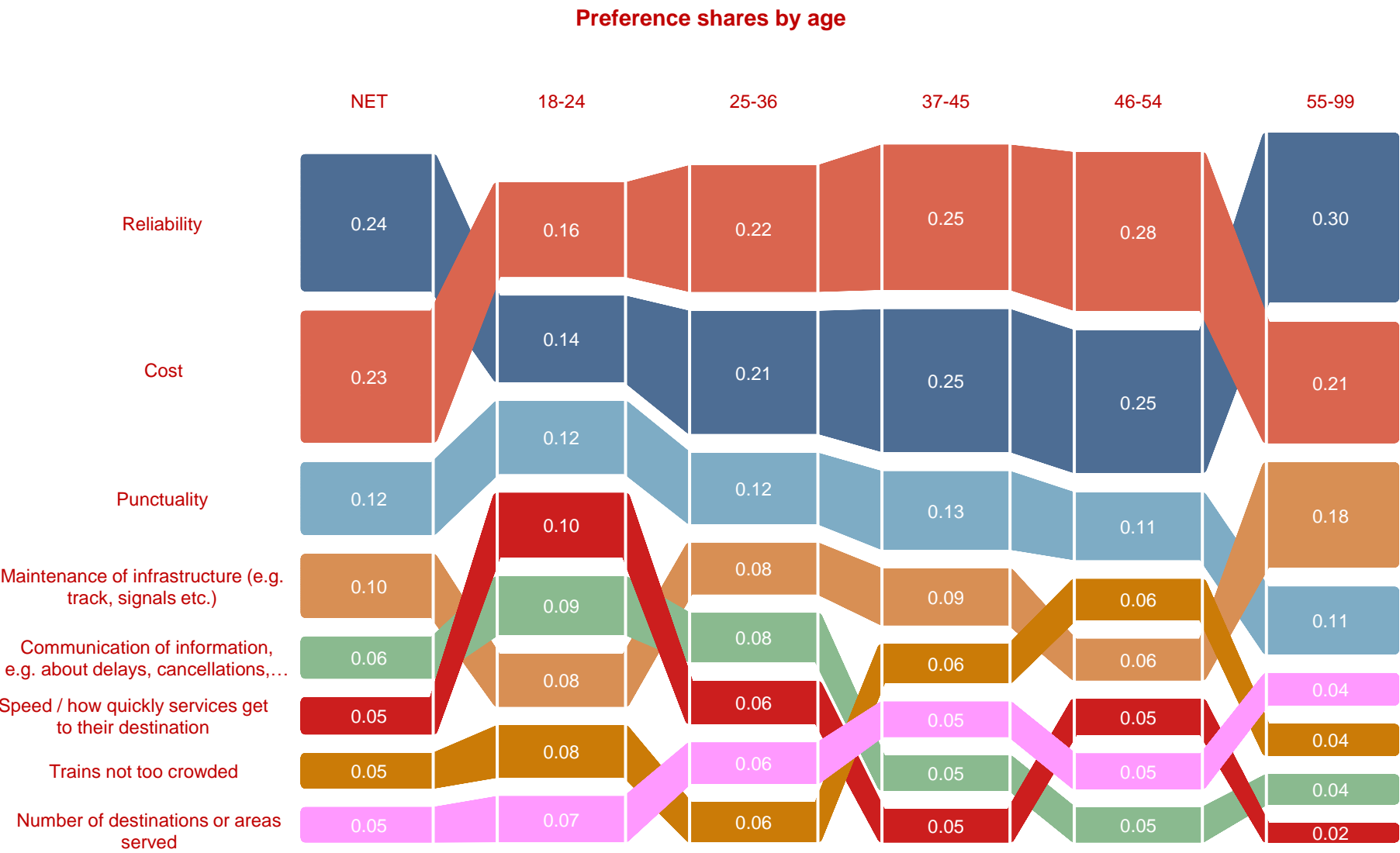
Max Diff analysis is a survey-based research technique used to quantify preferences. A MaxDiff question shows respondents a set of items, asking them to choose what is most and least important. When the results are displayed, each item is scored, indicating the order of preference

In the Max Diff exercise reliability and cost came out top followed by punctuality

Preference shares overall



Looking at the Max Diff exercise by age, reliability is more important than cost to older passengers as they are more likely to be travelling for leisure purposes and thus potentially at off peak times



QC2. Which of the following factors do you consider are most important for a 'good' rail service, and which are least important?

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Conclusions



Conclusions

Satisfaction with trains and individual service providers is high, though value for money and certain station facilities are seen as areas in need of improvement

- **Commuting remains the key reasons for use of trains** particularly compared to other modes: 46% are using National Rail to travel to and from work.
- **Punctuality and frequency of trains are recognised as sufficient**, a sentiment that was echoed in the qualitative research. Almost two thirds (63%) of respondents are satisfied with the trains that they use, and 45% feel that services have improved over the last two years, while a further 30% feel they have neither improved nor worsened.
- **Speed, accessibility, punctuality, and frequency are all rated highly. However value for money remains a sticking point**, with only just over a third (39%) satisfied and a third (32%) dissatisfied. There is also thought to be room for improvement for how well train companies deal with delays; only 37% are satisfied with this.
- Satisfaction with facilities on the train is broadly uniform, with over half satisfied with the helpfulness of the staff, cleanliness, the upkeep of the train, and comfort. Satisfaction with level of crowding is somewhat diminished compared to other facilities but almost half (45%) remain satisfied with this.
- Satisfaction is also relatively consistent for station facilities with two notable exceptions – facilities for car/bicycle parking and toilet facilities. Lower satisfaction for car parking can be explained by the fact that almost half say they are neither satisfied or dissatisfied with this as presumably they do not use these facilities and thus are unable to rate them. There is much clearer dissatisfaction with toilet facilities with 38% dissatisfied with these.

Conclusions

Passengers, at least at first, are not desperate to see substantial changes to London's rail provision – it is seen as 'good enough'

- The qualitative research demonstrated that passengers essentially hope for 'more of the same', a sentiment which is echoed in the quantitative research - 54% feel that the existing frequency of trains within their local service is acceptable, while half are happy with their current timetable and feel nothing needs to change.
- This resistance to change is particularly strong when it comes to potentially reducing the frequency of trains. 64% agree (a quarter strongly) that a service with less frequent trains would discourage them from using the rail. Almost a third do not agree that increased capacity can make up for a less frequent service (31%) and 4 in 10 do not agree that if fewer trains ran per hour on their service it would be more likely to turn up on time (40%).
- However they do not want to see the current timetable maintained at the expense of reliability and punctuality – when asked about their preferred approach to timetabling less than a quarter (21%) chose this option, with almost half preferring instead an approach with roughly the same number of trains per hour regardless of the time of day. Indeed, as observed in the qualitative research punctuality and reliability are seen as paramount.
- In the qualitative research there was very little call for changes to timetables as a result of changing working patterns; most assume that on days when commuters do go into the office, they will do so during conventional peak times. This is supported by the exercise in which respondents were allowed to allocate a percentage to the number of trains they would put on at certain times of the day – unsurprisingly the highest number were allocated during the peak commuting hours of 6- 9 a.m. and 3 - 6 p.m. Intriguingly though 56% think changes to working patterns might mean that commuter services are less important than before the pandemic.
- In summary, passengers are reluctant to embrace changes concerning either the timetable or the frequency of trains; introducing changes to either of these elements would put passengers off using the railway

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Appendix



Frequency of travel

Mode	At least 2-3 times a week	Once every week/2 weeks	Once a month or less	I do not use this mode
Walking a significant distance	72%	24%	3%	1%
Car	62%	32%	5%	1%
Transport for London Buses	60%	28%	11%	0%
London Underground	53%	32%	15%	0%
National Rail Services	53%	39%	7%	0%
Cycling	50%	38%	11%	1%
Motorcycle	40%	38%	22%	0%
DLR	39%	38%	23%	0%
London Overground	36%	40%	24%	0%
TfL Rail	37%	37%	23%	2%
London Trams	35%	34%	30%	1%
Black cabs/taxi	21%	41%	38%	0%
Private hire vehicles	15%	47%	37%	0%

QS4a. And how often do you currently use that mode? Again, please think about the last three months. Base: Total (887)

Use of public transport besides trains remains high with two thirds (69%) using buses

70%

of respondents use public transport that isn't a train (bus or tram)

61%

of respondents walk and/or cycle

49%

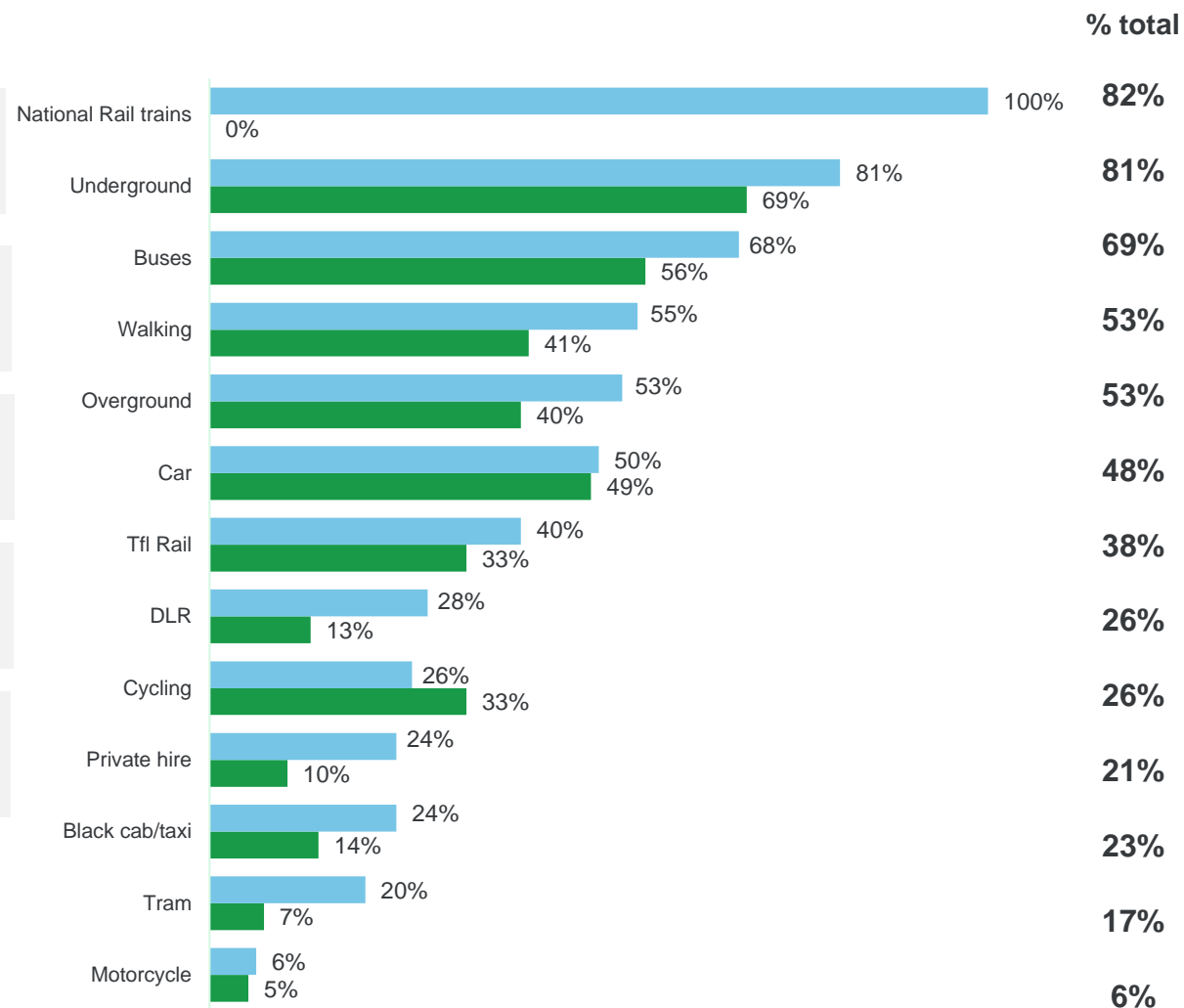
of respondents use a motorcycle and/or car

35%

of respondents use a form of light rail (DLR and/or tram)

33%

of respondents use taxi and/or private hire



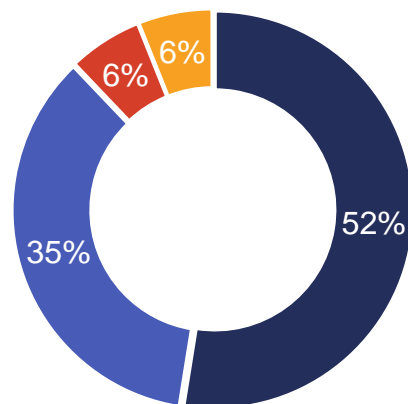
■ Current National Rail users

■ Lapsed National Rail users

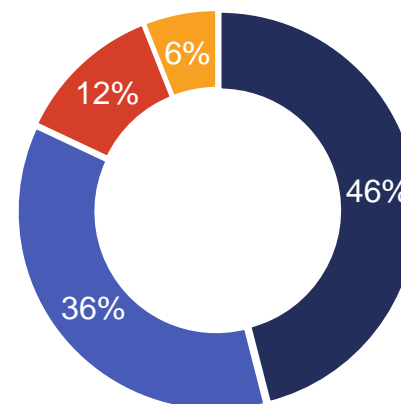
QS3. Which of the following modes of transport do you currently use? Please think about this in terms of the last three months. Base: Total (887) Current users (638) Lapsed users (104)

Commuting remains the key reason for use of Underground, National Rail and TfL rail. However, leisure trips also feature prominently with almost half (45%) using DLR for this

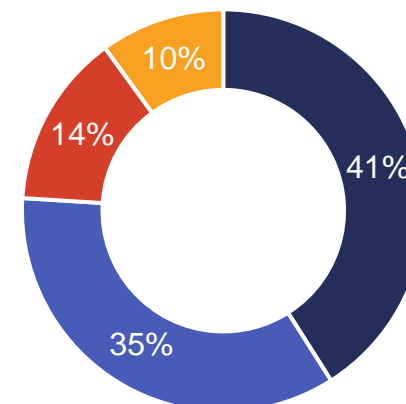
London Underground



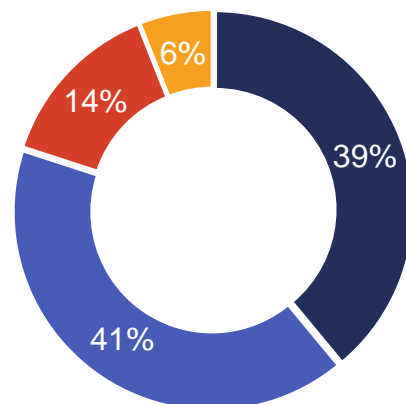
National Rail services



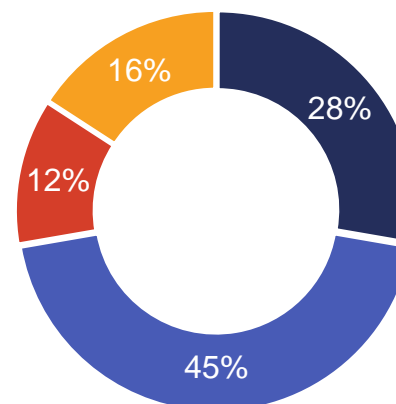
TfL Rail



London Overground



DLR



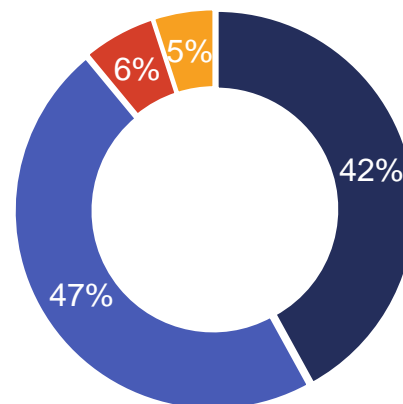
Disabled passengers are significantly less likely to use National Rail for commuting purposes (29%) and the DLR for commuting (8%)

■ Commuting to work ■ Leisure trips ■ Business trips ■ Volunteer work + Caring for dependent (e.g., elderly relative)

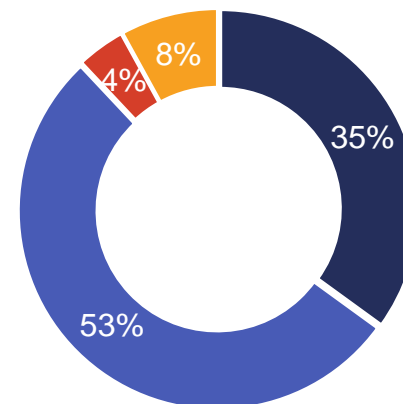
QS5. For what purpose do you [IF LAPSED: did you] primarily use that mode of transport? Base: London Underground (587), National Rail (742), TfL Rail (256), London Overground (373), DLR (223)

Over a third (42%) are using buses or Trams (39%) to commute.
Walking and cycling are primarily for leisure purposes

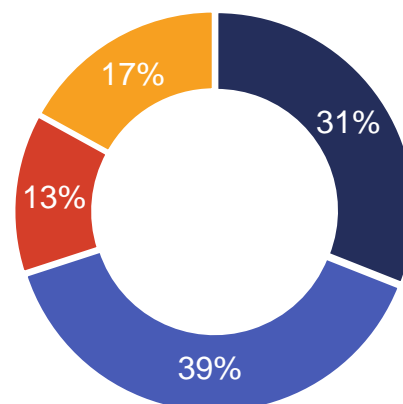
Transport for London Buses



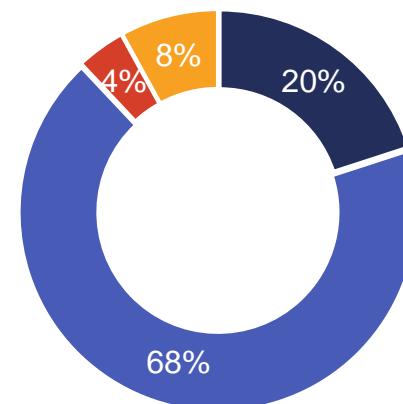
Walking a significant distance



London Trams



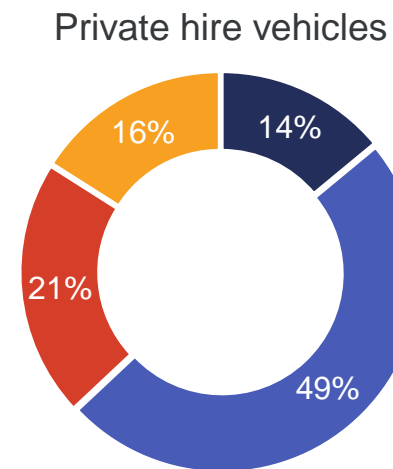
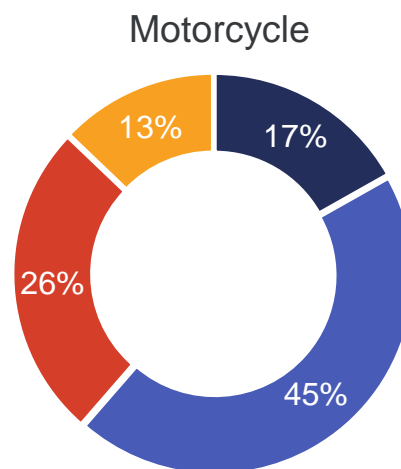
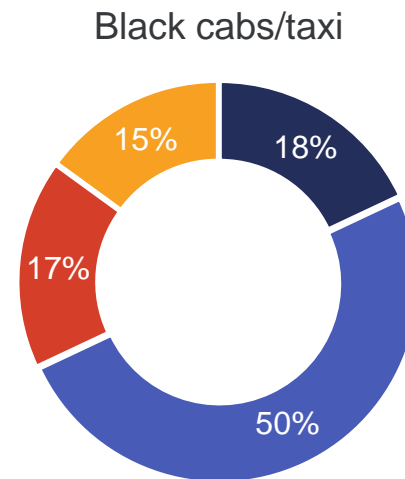
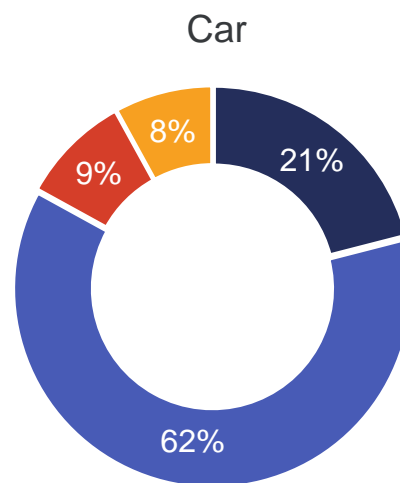
Cycling



■ Commuting to work ■ Leisure trips ■ Business trips ■ Volunteer work + Caring for dependent (e.g., elderly relative)

QS5. For what purpose do you [IF LAPSED: did you] primarily use that mode of transport? Base: Transport for London Buses (518), Walking (598), London Trams (162), Cycling (223)

Motor transport (especially private car) is used mostly for leisure purposes



■ Commuting to work ■ Leisure trips ■ Business trips ■ Volunteer work + Caring for dependent (e.g., elderly relative)

QS5. For what purpose do you [IF LAPSED: did you] primarily use that mode of transport? Base: Total Black cabs (138), Car (502), Motorcycle (99), Private hire vehicles (166)



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