



London and the south east passenger panel survey

November 2016

Background and aims

- The report presents the findings of a survey undertaken with over 2,000 passengers on the Transport Focus Transport User Panel who had previously indicated that they had used Southern, Southeastern, Thameslink, or Gatwick Express services in the last 12 months. Fieldwork for the survey was undertaken between 7 and 13 November 2016.
- The key aims of the survey were to generate indicative findings which:
 - provides a benchmark with which to monitor passenger satisfaction since 31st October 2016 when Southern reinstated its full timetable. The measure is designed to monitor satisfaction amongst passengers using Southern services against users of the other networks since this time.
 - measures when and how passengers travelling on the routes indicated find out about disruption and delay to their train services, which sources of information they trust, whether passengers are claiming delay repay compensation, and how easy they find this process.
 - explores the extent to which passengers would be happy to use smart technology to allow for the automation of the process of receiving compensation.
- Results are shown for passengers using each of the four networks within the 'South East Quadrant' (SEQ). Results are also shown for 'regular commuters'. These passengers are defined as those who use the specific network at least three times a week and who mainly use trains in order to commute to work or to education.
- More detailed information on how this survey was carried out and the breakdown of responses by network and main journey purpose is included as an appendix to this report.

Executive summary

- More than a half say that the performance of their train service has remained the same since 31 October 2016, while two in five say that the service has got worse. Those using Southern are more likely than others to say that the service has got worse, indicating that any improvements made in relation to the reinstatement of the full timetable have not yet been noticed.
- More than three in five say that they have been delayed in the last week and on average these passengers have been delayed three times. Those who have been delayed on Southeastern trains in the last week say that they have experienced the least occasions of delay on average.
- On the last occasion that they were delayed, two thirds found out when they reached their departure station, while less than one in ten found out before this time. Those using Thameslink services are more likely than others to find out about the delay before arriving at their departure station.
- Passengers tend to use at-station sources of information to find out about delays and disruption. Third party apps and websites are most often used compared with train operating company alternatives.
- As well as being the most often used, departure screens at the station and ad hoc/live staff announcements are the most trusted sources of information about delay and disruption. Commuters are less likely to trust these sources of information than other passengers, and are also more likely than other passengers to favour word-of-mouth and social-media based sources.
- Overall more than three in five passengers who have been delayed for 30 minutes or more have submitted a claim for compensation. This finding is largely consistent across passengers using different train operating companies and across commuters and other passenger types.
- Around a half of passengers submitting a claim for compensation for a delay say that they found the process easy, and more than three in five say that making a claim was worthwhile. Passengers using Thameslink services are less likely than others to have found the process to be easy or worthwhile.

Executive summary

- Around nine in ten passengers own a smartphone / smart device and three quarters of these use their device in order to check for disruption to trains, almost three in ten use the device to check for alternative routes and more than half use it in order to get information on the extent of any delay.
- More than three in five passengers say that they can usually use their smartphone / smart device to connect to the internet when on the platform, while only one in five say that they can get a good connection throughout the whole of their journey on board the train.
- Passengers using smartphones were asked how likely they would be to download a train operating company app which would monitor journeys and offer automatic alerts if it appeared that the passengers was eligible for delay compensation. These passengers were then asked if they would be more, or less, likely to download such an app if it could offer the automatic payment of compensation by bank transfer or by PayPal.
- Around two-thirds of passengers using a smartphone agreed that they would be likely to download such an app, and also that they would be more likely to download it if it offered enhanced and automatic ways in which compensation could be paid. Commuters are more likely to use smartphones/smart devices and are more likely than passengers overall to download a train company app as described.

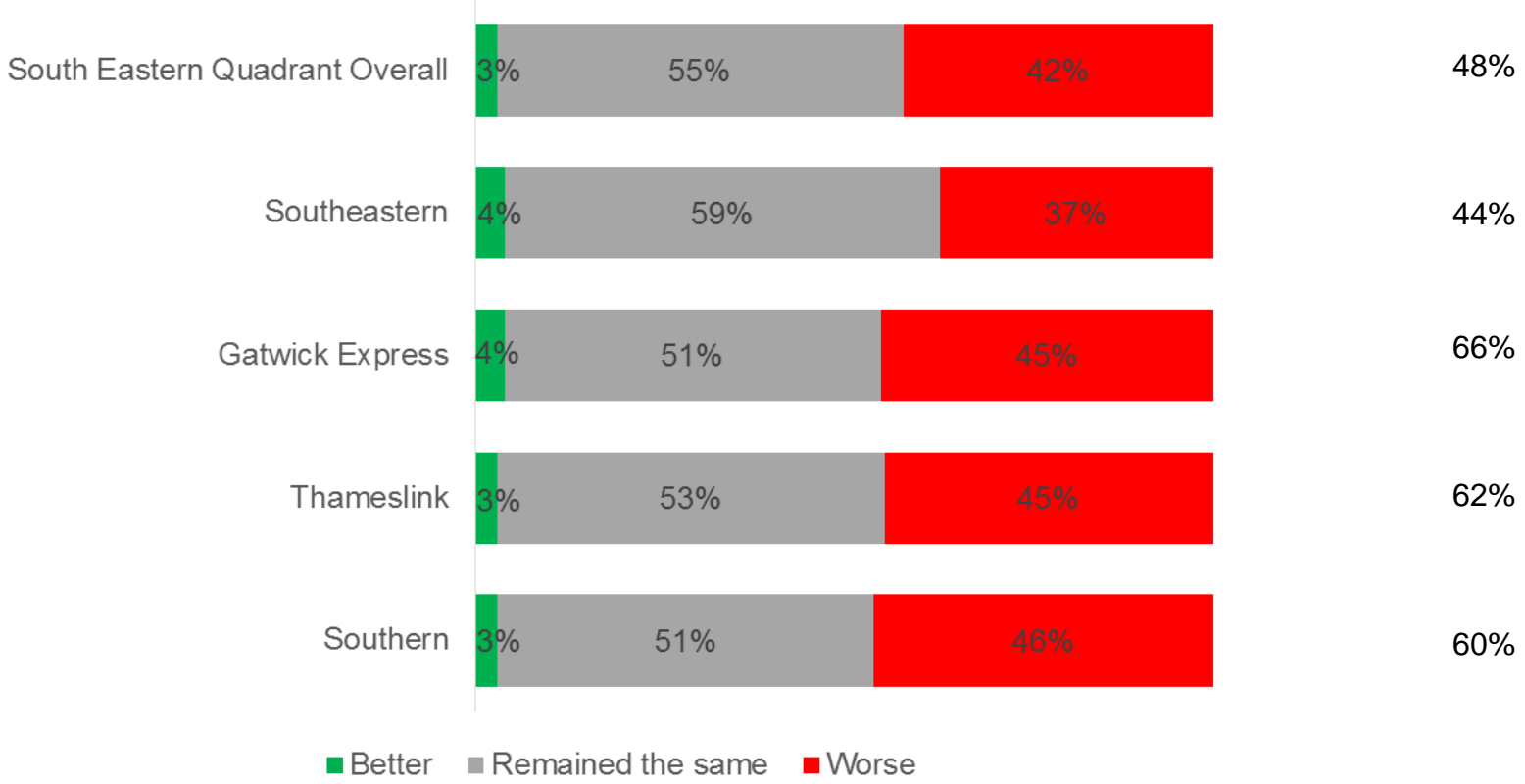


Detailed findings

More than two in five who have used trains in the London and the south east say that services have got worse since the 31 October, while more than half say that performance has remained consistent since this time. Those using Southern trains are more likely than passengers overall to say that things have deteriorated. Commuters are generally more likely to say that things have got worse than those who are not commuting. Those who commute regularly are most likely to say that things have deteriorated since 31 October; those commuting regularly using Gatwick Express services are particularly dissatisfied, while those using Southeastern are relatively happier.

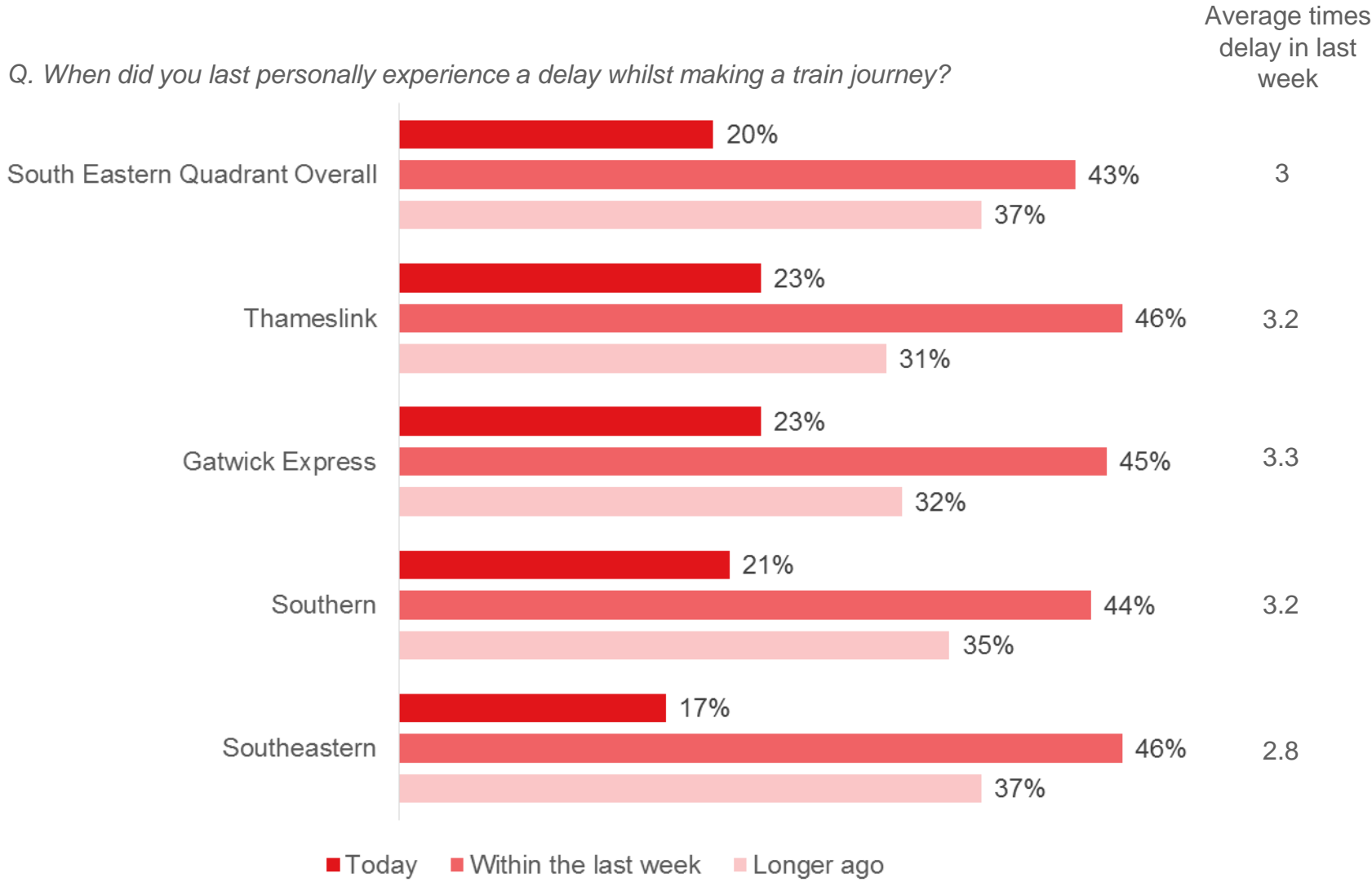
Q. Since 31st October has the performance of your train service got better, got worse, or remained the same?

% Worse
Regular Commuters



Base: All passengers who have travelled by Southern, Thameslink, Southeastern, Gatwick Express since 31 October (1,589), Southern (1,143), Thameslink (904), Southeastern (894), Gatwick Express (376). Fieldwork 7-13 November 2016

One in five of those say that they were delayed on the day that they completed the survey, while more than two in five have been delayed in the last week. Those who say that they were delayed within the last week have, on average, been delayed three times. Southeastern passengers who have been delayed in the last week experience the least number occasions of delay on average.

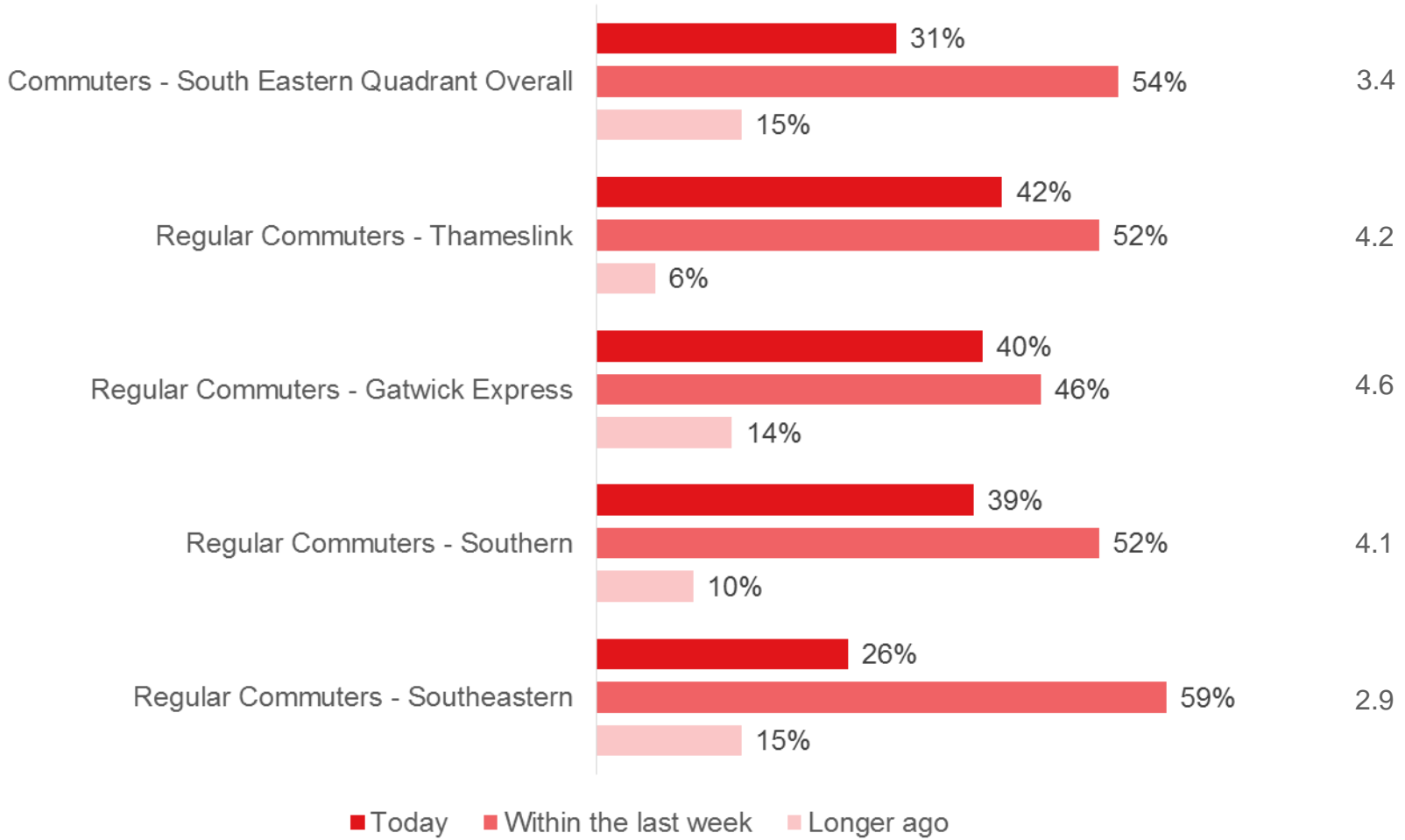


Base: All passengers who have experienced a delay while making a train journey (1,860), Southern (1,339), Thameslink (1,023), Southeastern (1,009), Gatwick Express (433). All passengers who have experienced a delay in the last week (1,169), Southern (871), Thameslink (709), Southeastern (636), Gatwick Express (295). Fieldwork 7-13 November 2016

Compared with passengers overall, commuters are more likely to say that they have experienced delay recently. Three in ten say that they had experienced delay on the day they completed the survey, while more than half say that they had been delayed in the last week. Those who commute regularly are, perhaps unsurprisingly, more likely to have experienced a delay recently and are more likely to have experienced a greater number of occasions of delay, on average, in the last week.

Q. When did you last personally experience a delay whilst making a train journey?

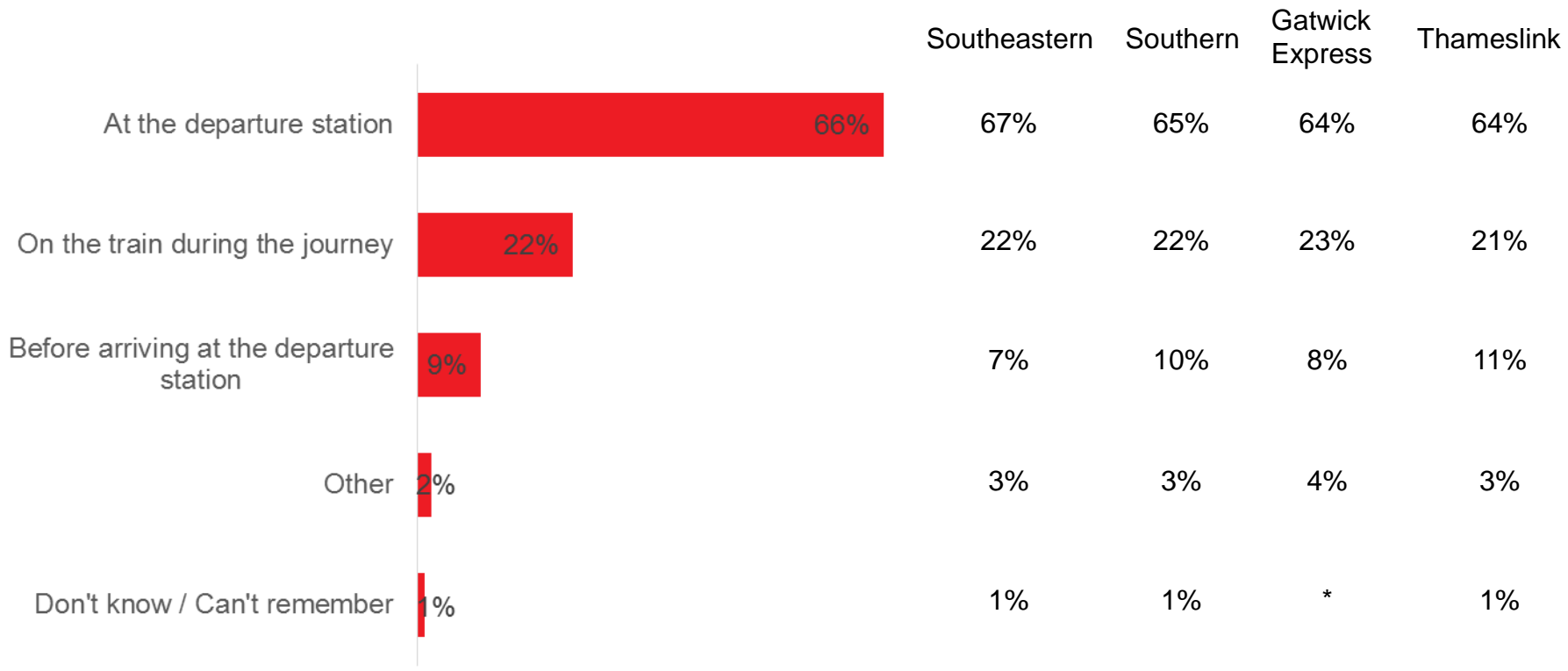
Average times delay in last week



Base: All commuters who have experienced a delay while making a train journey (942), Regular commuters using: Southern (378), Thameslink (235), Southeastern (297), Gatwick Express (65). Regular commuters who have experienced a delay in the last week using: Southern (342), Thameslink (221), Southeastern (251), Gatwick Express (56). Fieldwork 7-13 November 2016

On the last occasion that they were delayed, two-thirds found out about it at their departure station, while on in five found out on the train during their journey. Less than one in ten found out before they reached their departure station. These findings are consistent across passenger types and networks used, though compared with others, those commuting regularly on Thameslink services are more likely to find out about delay before they reach their departure station.

Q. On the last occasion that your journey was delayed, when did you find out about the delay?

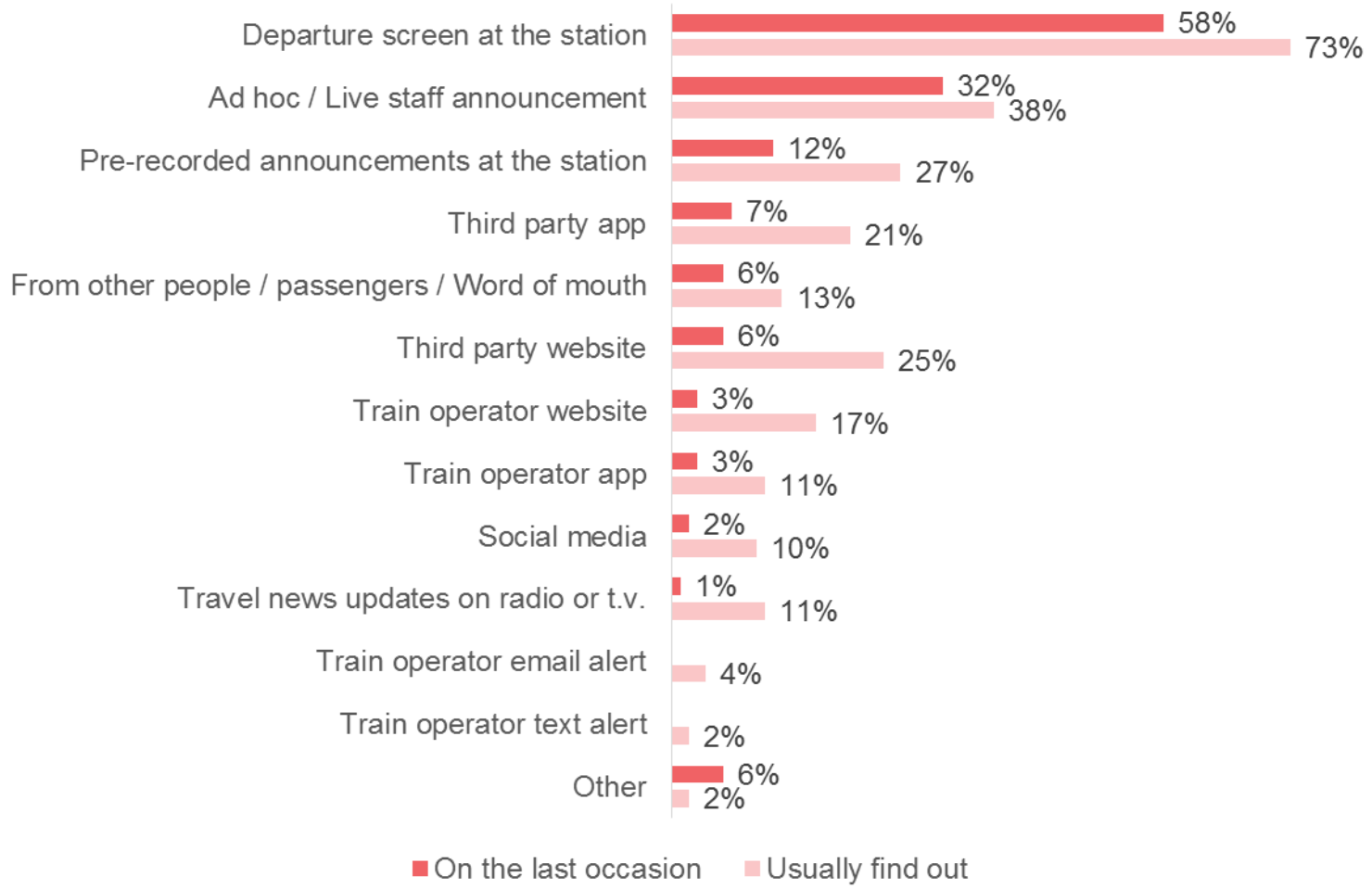


| % regular commuters finding out before arriving at the departure station: | | | |
|---|----------|-----------------|--------------|
| Thameslink | Southern | Gatwick Express | Southeastern |
| 18% | 12% | 11% | 7% |

Base: All passengers who have experienced a delay while making a train journey (1,843), Southern (1,327), Thameslink (1,016), Southeastern (999), Gatwick Express (427). Fieldwork 7-13 November 2016

Passengers tend to use at-station sources of information most often when finding out about delays to their service. Departure screens, live and pre-recorded staff announcements were most commonly used both on the last occasion and more generally by passengers. Third party apps and websites are used more commonly than train company apps and websites.

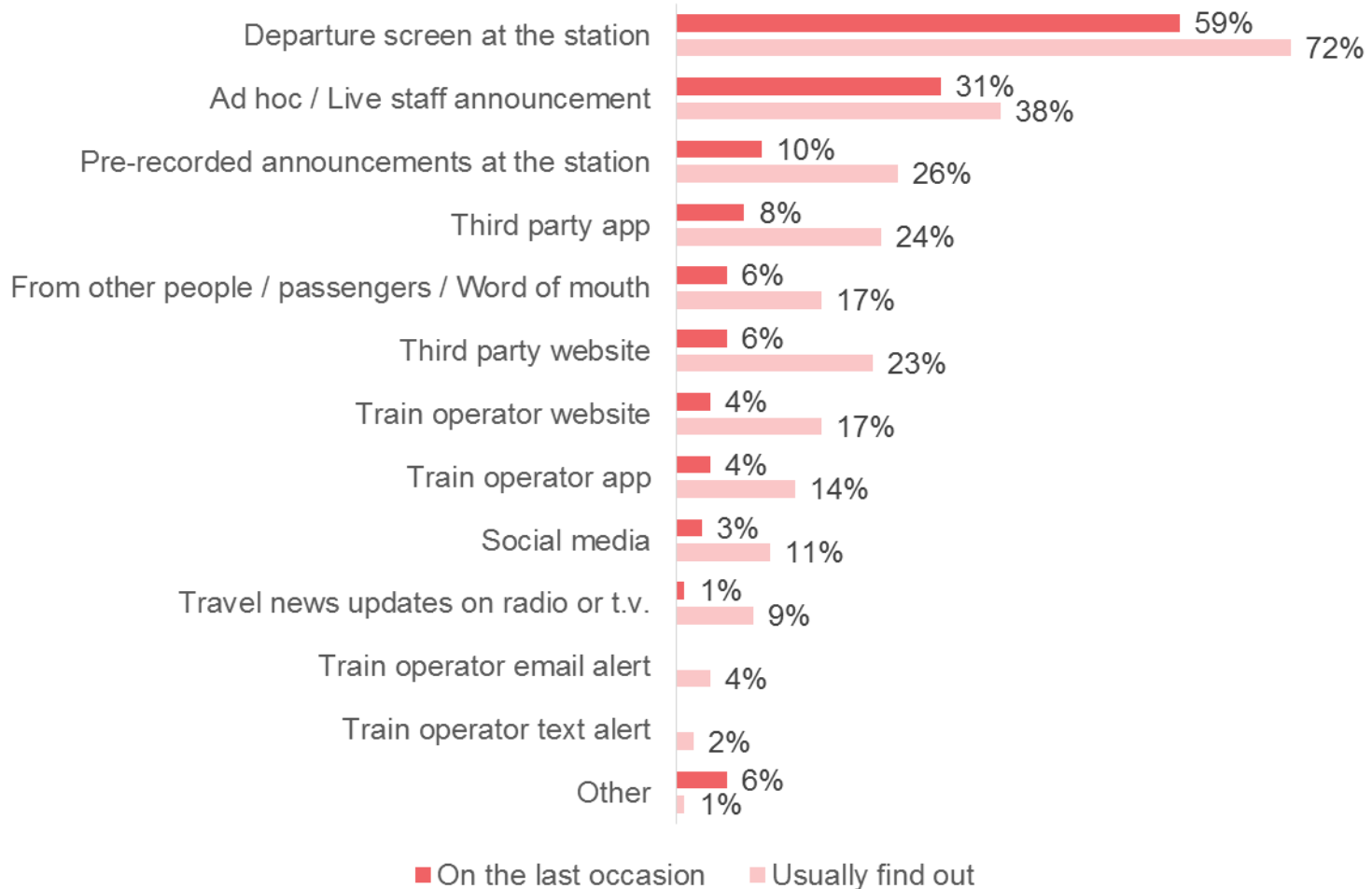
Q. And on that last occasion, how did you find out that your train was delayed?
 Q. In which ways do you usually find out about train delays and disruption?



Base: All passengers who have experienced a delay while making a train journey (1,843). Fieldwork 7-13 November 2016

Findings relating to which forms of information commuters use to find out about train delays and disruption are very consistent with those from passengers more generally. Again, on-station sources such as departure screens and live and ad hoc staff announcements are used most often.

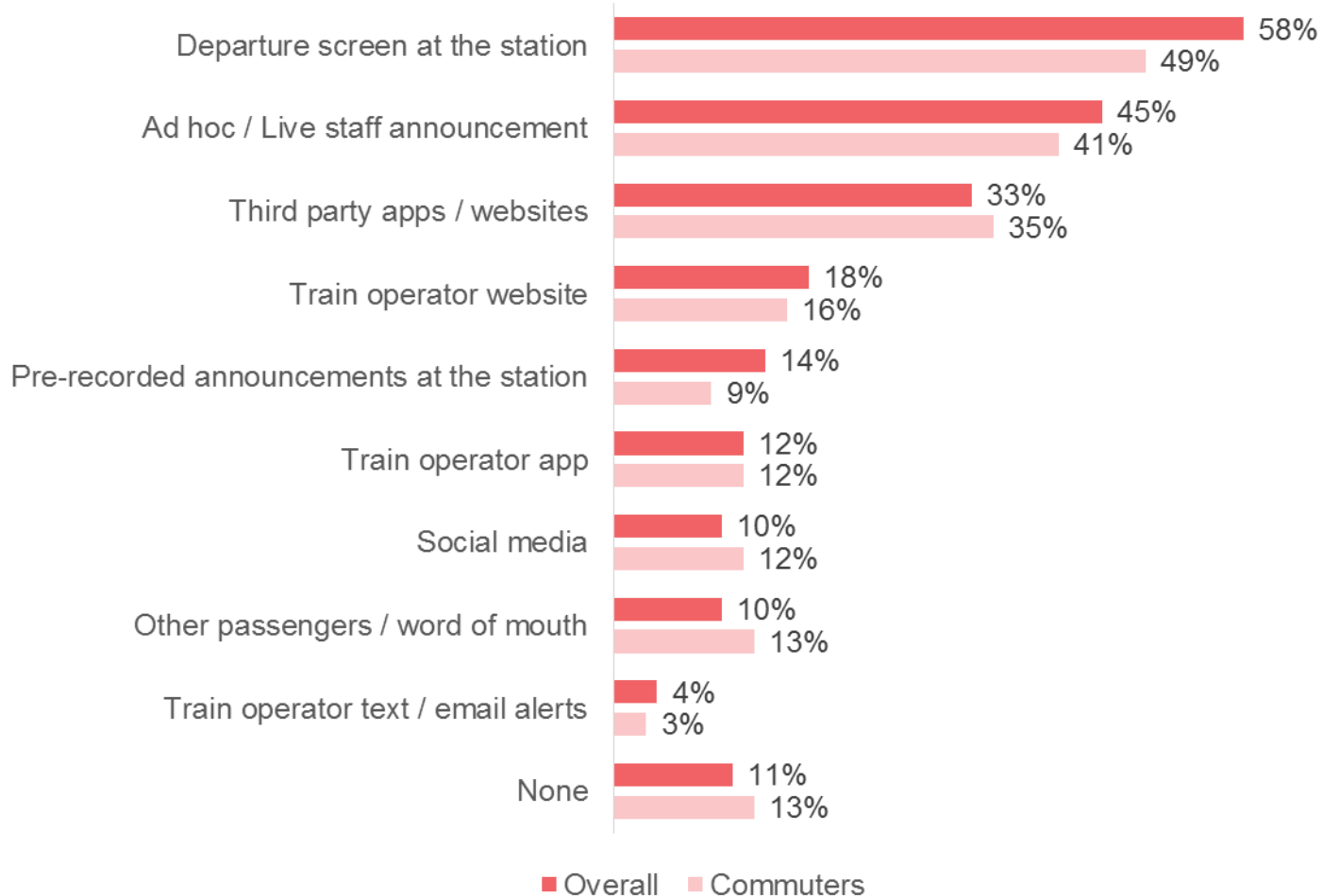
Q. And on that last occasion, how did you find out that your train was delayed?
 Q. In which ways do you usually find out about train delays and disruption?



Base: All commuters who have experienced a delay while making a train journey (938). Fieldwork 7-13 November 2016

As well as being the most commonly used, departure screens and ad hoc/live staff announcements are considered to be the most trustworthy sources of information about delays and disruption. While this is the case, commuters tend to be less favourable towards these sources than passengers generally and are more likely to favour third party and word of mouth/social media based sources of information about delay.

Q. Which three sources of information about train delays and disruption do you consider to be the most trustworthy?

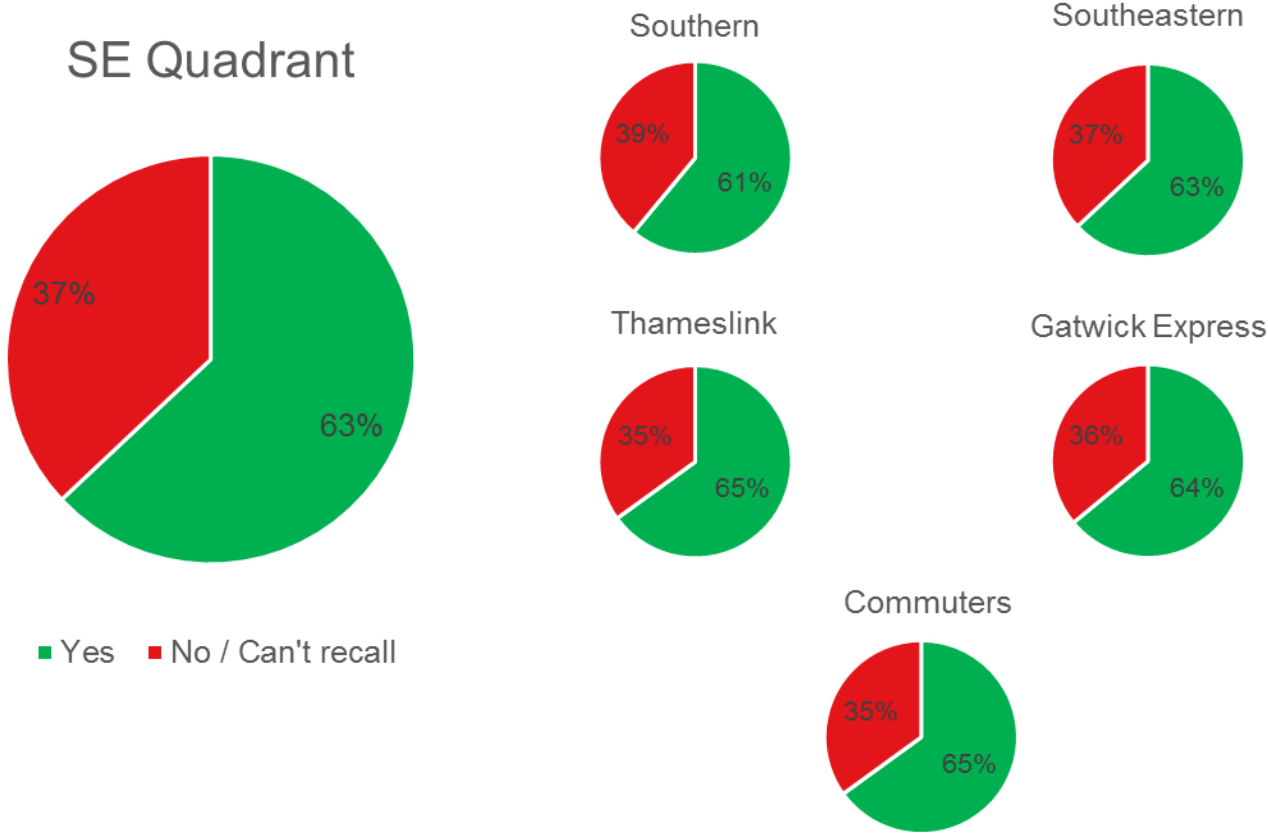


Base: All who have experienced a delay while making a train journey.
 Passengers overall (1,843, commuters (938). Fieldwork 7-13 November 2016

Overall more than nine in ten passengers who have been delayed have been so for 30 minutes or more. Almost two-thirds of these passengers have submitted a claim for compensation. Findings are largely consistent across networks and amongst commuters.

| % delayed for 30 minutes or more: | | | | |
|-----------------------------------|------------|----------|-----------------|--------------|
| Commuters | Thameslink | Southern | Gatwick Express | Southeastern |
| 96% | 93% | 94% | 95% | 93% |

Q. If your train journey has been delayed for more than 30 minutes, have you ever submitted a claim for compensation?



Base: All passengers who have experienced a delay of more than 30 minutes while making a train journey (1,712), Southern (1,245), Thameslink (946), Southeastern (933), Gatwick Express (404). Commuters (900). Fieldwork 7-13 November 2016

More than a half of passengers who have submitted a claim for compensation following a delay of 30 minutes or more say that they found the process of claiming to be easy, while three in ten disagree. Those using the Southeastern network are more likely than others to say that the process is easy. There are some large disparities related to levels of satisfaction among regular commuters, with those using Southeastern being least likely, and those using Gatwick Express being most likely to find the process of claiming compensation to be difficult.

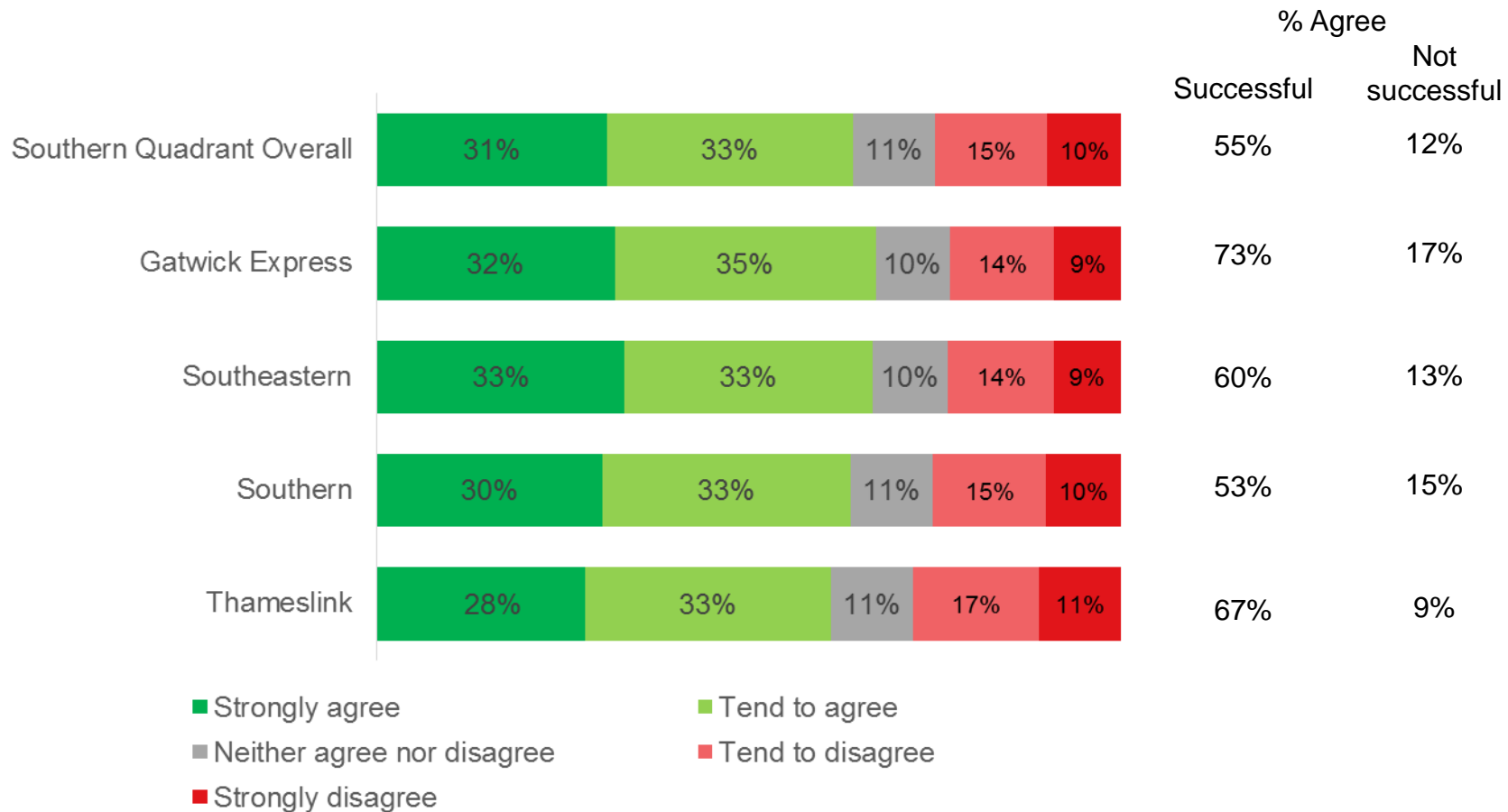
Q. How easy or difficult did you find the process of claiming compensation for the delay to your journey?



Base: All passengers who have made a claim for compensation following a delay of 30 minutes or more (1,072), Southern (762), Thameslink (613), Southeastern (592), Gatwick Express (257). Fieldwork 7th-13th November 2016

Overall two thirds of passengers who have submitted a claim for compensation following a delay of 30 minutes or more agree that making such a claim was worthwhile. While those using Gatwick express are the least likely to find the process of claiming compensation to be easy, they are most likely to find the process worthwhile. Those whose claim was unsuccessful are, perhaps unsurprisingly, less likely to agree that the process was worthwhile than those whose claim was successful. While this is the case there are notable proportions of those for whom the process is worthwhile regardless of the result.

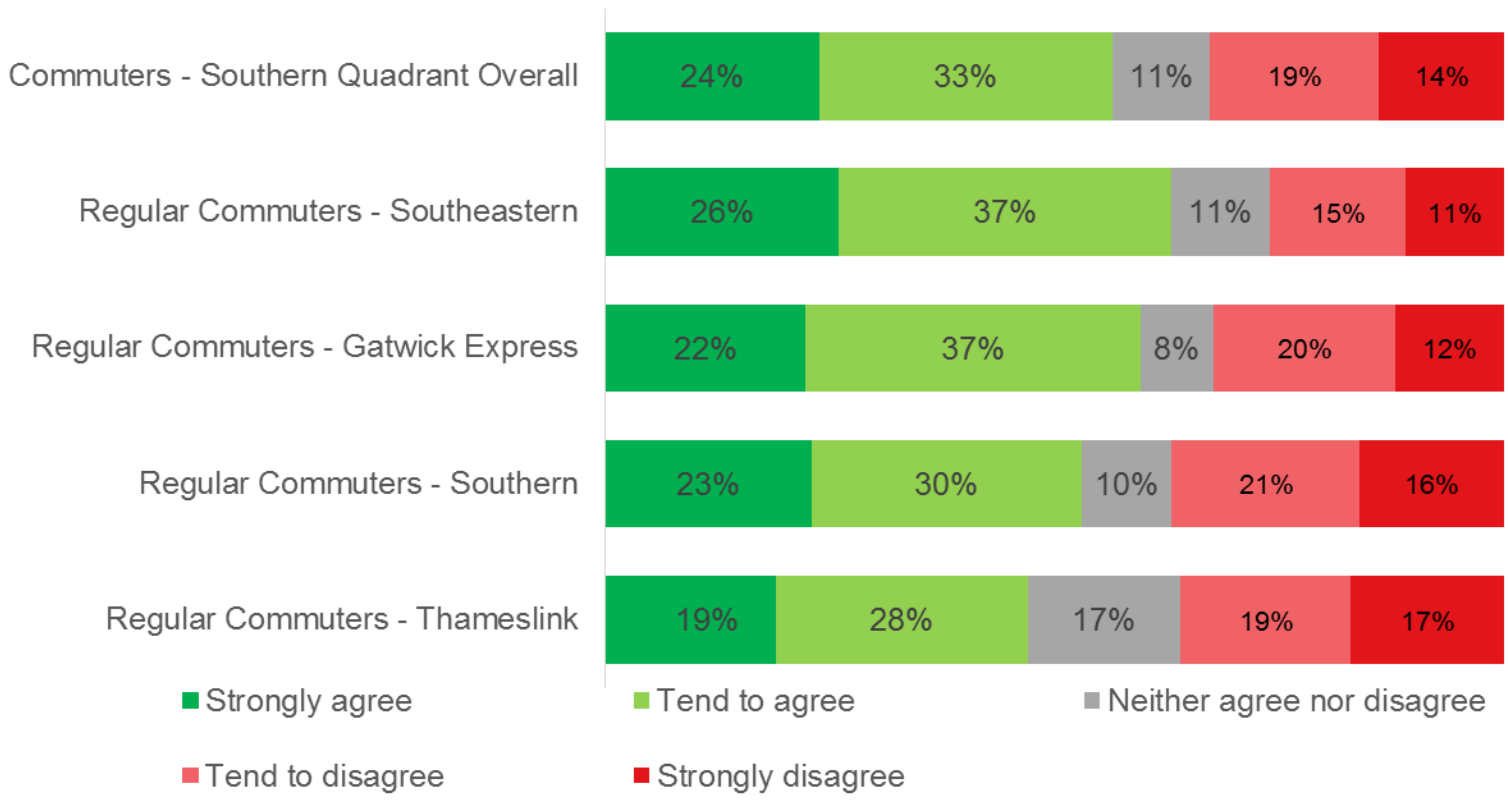
Q. To what extent do you agree or disagree that the effort you made to make a claim for compensation was worthwhile?



Base: All passengers who have made a claim for compensation following a delay of 30 minutes or more (1,072), Southern (762), Thameslink (613), Southeastern (592), Gatwick Express (257). Fieldwork 7-13 November 2016

In general commuters are less likely than passengers overall to agree that the effort that they made in submitting a claim for compensation was worthwhile. Compared with others, those who commute regularly using Southeastern services are most likely to say that the effort was worthwhile while those using Thameslink services are least likely; 63 percent of regular commuters on Southeastern say this compared with 47 per cent of those using Thameslink services.

Q. To what extent do you agree or disagree that the effort you made to make a claim for compensation was worthwhile?

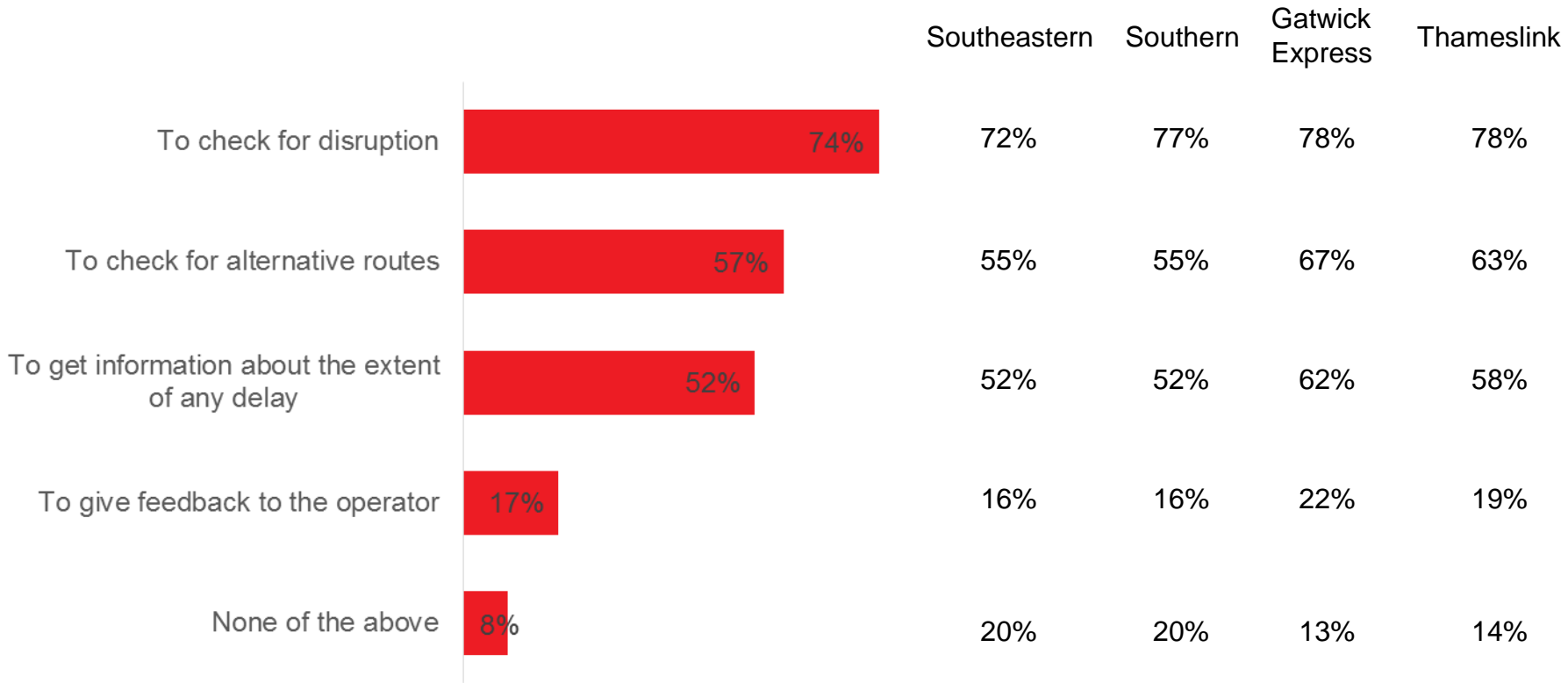


Base: All commuters who have made a claim for compensation following a delay of 30 minutes or more (586), Southern (220), Thameslink (156), Southeastern (193), Gatwick Express (49). Fieldwork 7-13 November 2016

Overall almost nine in ten own a smartphone / smart device. Of these passengers three quarters use their smartphone or device to check for disruption, while more than a half use their smartphone or device to check for alternative routes at times of disruption. Passengers using Gatwick Express are more likely to own a smartphone/ smart device and to use this in relation to their train journey during disruption.

| % own a smartphone / smart device: | | | | |
|------------------------------------|------------|----------|-----------------|--------------|
| SEQ Overall | Thameslink | Southern | Gatwick Express | Southeastern |
| 88% | 89% | 87% | 92% | 87% |

Q. If you use a smartphone / smart device, do you use it for any of the following?

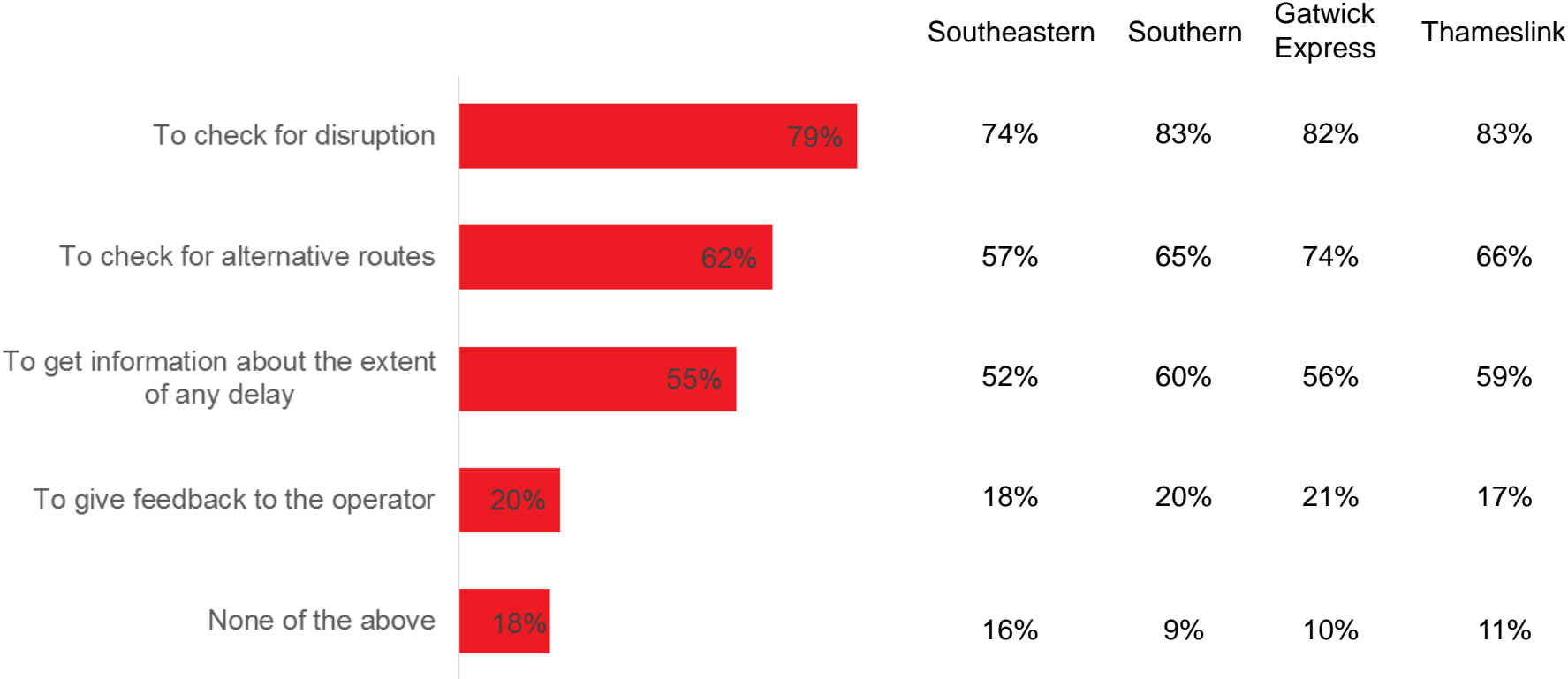


Base: All passengers who own a smartphone/smart device (1,753), Southern (1,231), Thameslink (946), Southeastern (944), Gatwick Express (425). Fieldwork 7-13 November 2016

Commuters are more likely than passengers overall to own a smartphone/smart device and to use this in relation to their train journey during disruption. Four in five use their smartphone/smart device to check for disruption, while three in five use their device to check for alternative routes and more than a half to get information about the extent of any delay.

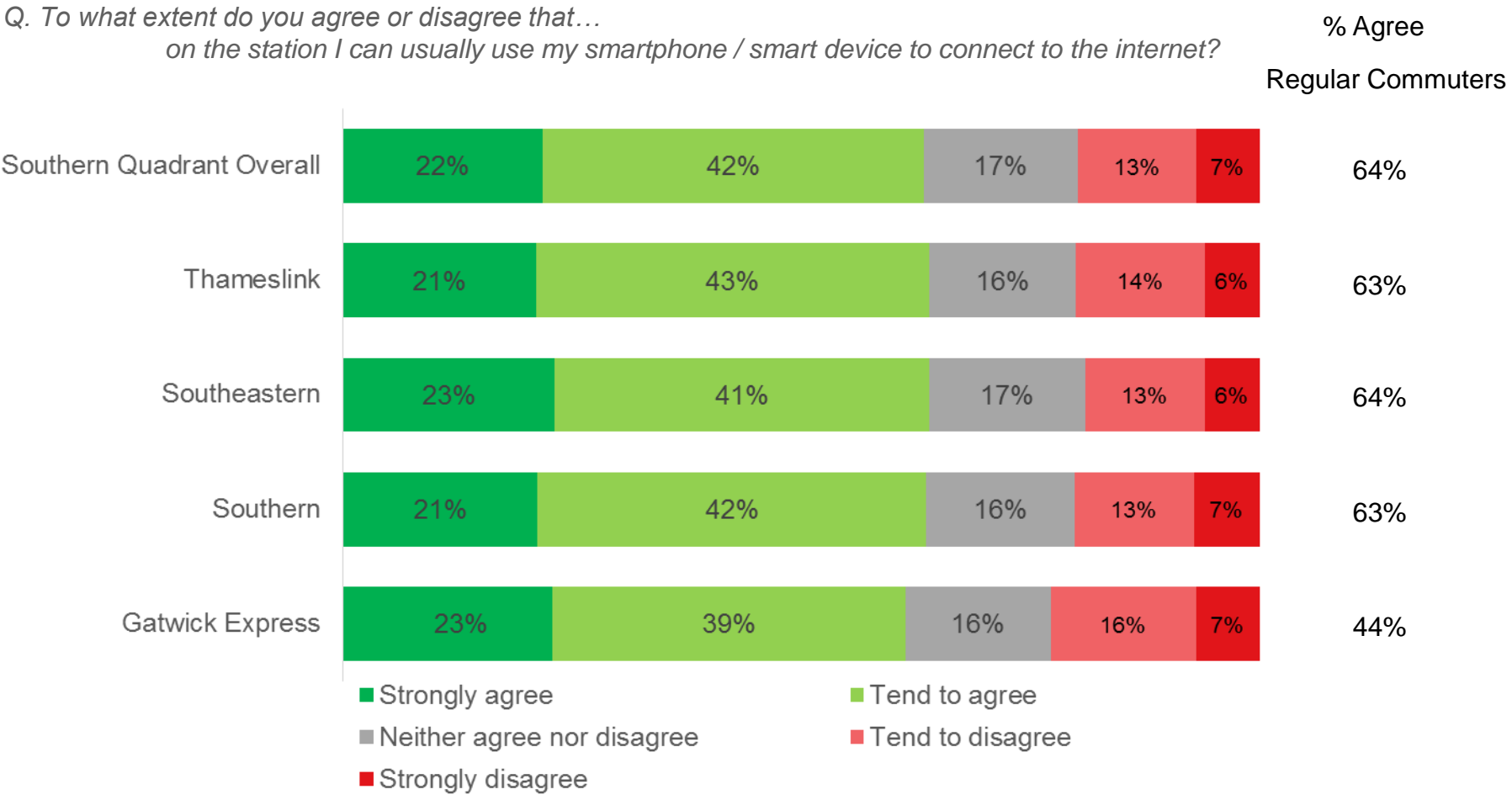
| % commuters own a smartphone / smart device: | | | | |
|--|------------|----------|-----------------|--------------|
| SEQ Overall | Thameslink | Southern | Gatwick Express | Southeastern |
| 93% | 93% | 94% | 94% | 93% |

Q. If you use a smartphone / smart device, do you use it for any of the following?



Base: All commuters who own a smartphone/smart device (897), Southern (360), Thameslink (219), Southeastern (282), Gatwick Express (61). Fieldwork 7-13 November 2016

Almost two-thirds of passengers agree that they can use their smartphone/smart device to connect to the internet on stations. Findings across networks and between commuters and passengers overall are largely consistent, although those who regularly commute using the Gatwick Express are less likely to agree when compared with those regularly commuting using other networks.

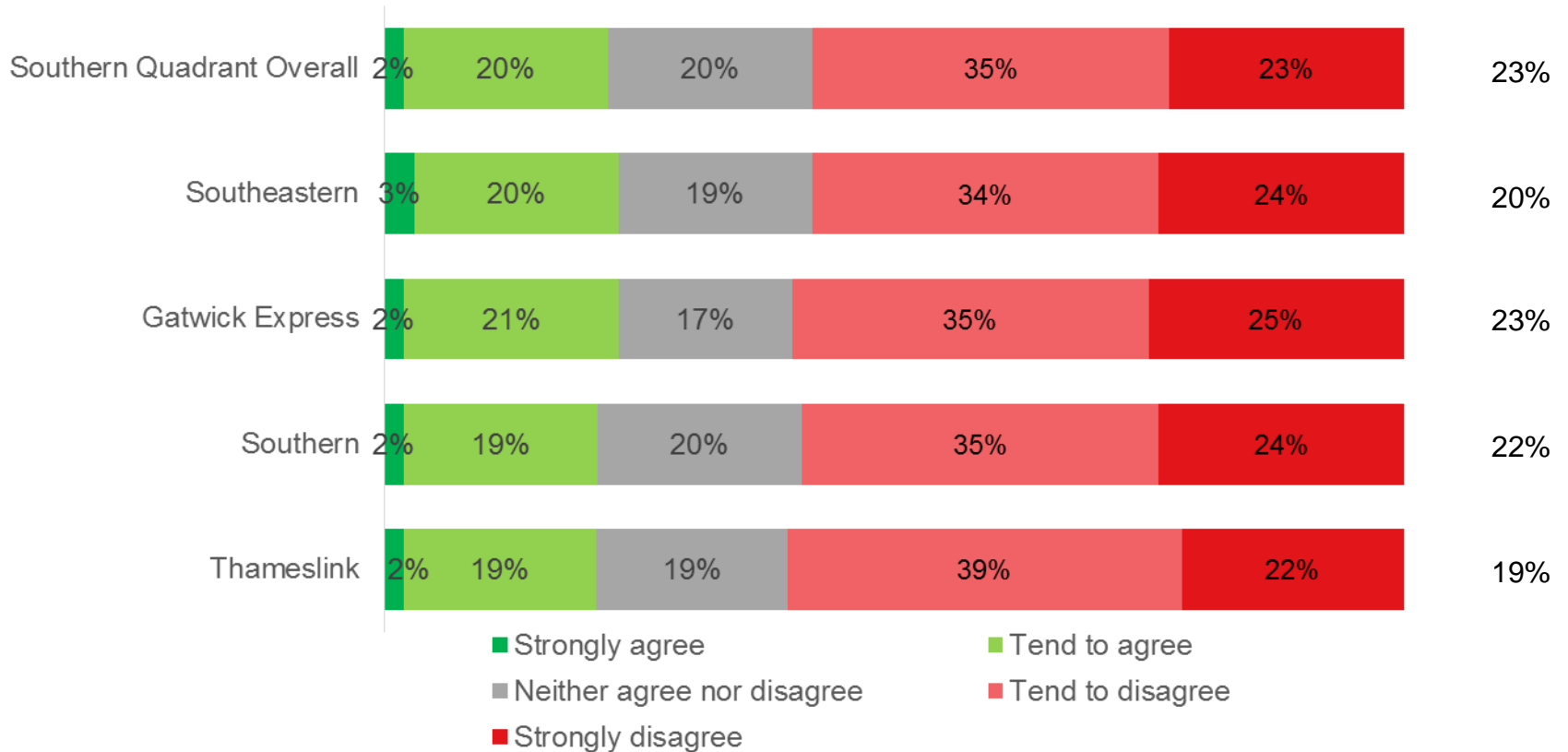


Base: All passengers who own a smartphone/smart device (1,753), Southern (1,231), Thameslink (946), Southeastern (944), Gatwick Express (425). Fieldwork 7-13 November 2016

Overall passengers are less likely to agree that they can get a good internet connection on board the train throughout their journey than they are to say that they can connect to the internet at stations. Consistently across networks around one in five agree that they can get a good connection throughout their journey while around three in five disagree.

Q. To what extent do you agree or disagree that...
on board the train I can get a good internet connection throughout my journey?

% Agree
Regular Commuters



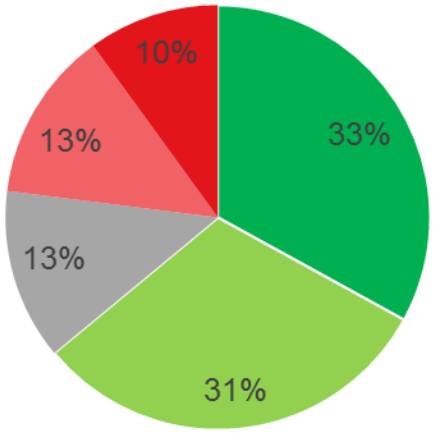
Base: All passengers who own a smartphone/smart device (1,753), Southern (1,231), Thameslink (946), Southeastern (944), Gatwick Express (425). Fieldwork 7-13 November 2016

Two thirds of passengers who own a smartphone/smart device say that they would be likely to download a train company app which would monitor journeys in order to provide automatic alerts as to when delay replay compensation may be due. Similarly two thirds of these passengers say that they would be more likely to download such an app if it offered the ability for payment to be made directly via bank transfer or similar.

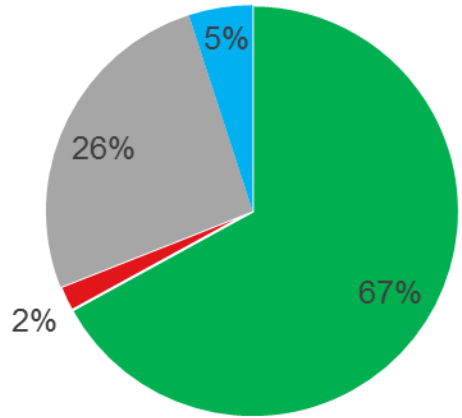
Q. How likely would you be to sign-up to a train company smartphone app which would monitor your journeys in order to alert you automatically when you were eligible for delay replay compensation?

Q. Would you be more likely, less likely, or would your likelihood to download such an app remain the same if it offered the ability to automatically pay the compensation you were entitled to straight to you via bank transfer or PayPal?

Likelihood to download app



Likelihood to download app given direct bank transfer



- Very likely
- Fairly likely
- Neither likely nor unlikely
- Fairly unlikely
- Very unlikely

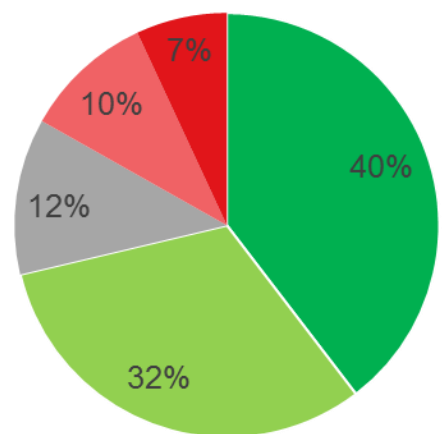
- More likely
- Remain the same
- Less likely
- Don't know

Commuters are more likely than passengers general to say that they would download a train company app offering alerts when compensation is due, and also to say that they would be more likely to download such an app if it also offered automatic payment. Seven in ten commuters indicate this in each case.

Q. How likely would you be to sign-up to a train company smartphone app which would monitor your journeys in order to alert you automatically when you were eligible for delay repay compensation?

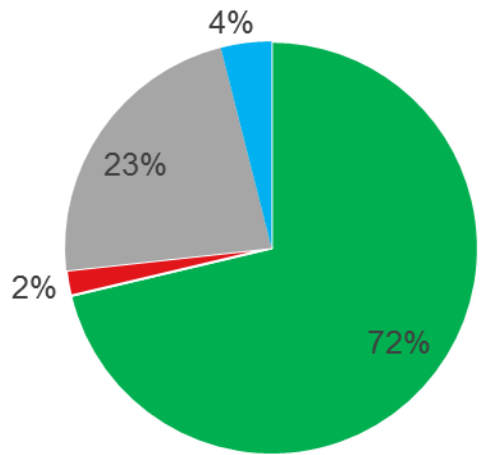
Q. Would you be more likely, less likely, or would your likelihood to download such an app remain the same if it offered the ability to automatically pay the compensation you were entitled to straight to you via bank transfer or PayPal?

Likelihood to download app



- Very likely
- Fairly likely
- Neither likely nor unlikely
- Fairly unlikely
- Very unlikely

Likelihood to download app given direct bank transfer



- More likely
- Remain the same
- Less likely
- Don't know

| | Regular commuters - Southeastern | Regular commuters - Thameslink | Regular commuters - Gatwick Express | Regular commuters - Southern |
|--------------------------|----------------------------------|--------------------------------|-------------------------------------|------------------------------|
| % likely to download app | 77% | 74% | 72% | 71% |
| % more / less likely | 72% | 76% | 74% | 76% |

Base: Commuters travelling on Southern who own a smartphone/ smart device (897). Fieldwork 7-13 November 2016



Technical appendix

How we carried out this survey

- On 7 November 2016 the online survey was sent to passengers who had previously been in contact with Transport Focus and had indicated that they had used Southern, Southeastern, Thameslink, or Gatwick Express train services in the last 12 months. These passengers had been in contact with Transport Focus in one of three ways:
 - Those that had responded to an initial survey and had indicated that they would like to join the Transport Focus Transport Users' Panel
 - Those that had completed the National Rail Passenger Survey (NRPS) previously and had given permission to be re-contacted
 - Those who had contacted Transport Focus via the website and had asked to join the Transport Users' Panel
- Fieldwork for the survey was undertaken between 7 and 13 November 2016, with a reminder email sent to non-responders on 11 November 2016.
- **Note on interpretation of the data:** data is representative of members of Transport Focus' Transport Users' Panel and therefore should be seen as indicative, rather than statistically representative, of the view of passengers generally. Data is unweighted.
- Findings in the report are shown for passengers using each of the networks defined as within the South East Quadrant and also for 'regular commuters'. Regular commuters are defined as those that use the network at least three times a week and travel mainly for this reason.

Numbers of respondents by frequency of network use and network by usual journey purpose

| | 4 or more days a week (n / %) | | 1-3 days a week (n / %) | | A few days a month (n / %) | | About once a month (n / %) | | About once every 6 months (n / %) | | Less often (n / %) | |
|-----------------|-------------------------------|-----|-------------------------|-----|----------------------------|-----|----------------------------|-----|-----------------------------------|-----|--------------------|-----|
| | n | % | n | % | n | % | n | % | n | % | n | % |
| Thameslink | 82 | 15% | 75 | 14% | 96 | 18% | 105 | 20% | 133 | 25% | 44 | 8% |
| Southern | 101 | 15% | 80 | 12% | 118 | 18% | 134 | 20% | 167 | 25% | 72 | 11% |
| Southeastern | 252 | 23% | 135 | 12% | 187 | 17% | 181 | 17% | 225 | 21% | 108 | 10% |
| Gatwick Express | 26 | 13% | 16 | 8% | 31 | 16% | 44 | 22% | 47 | 24% | 34 | 17% |

| | Overall (n / %) | | Commuter (n / %) | | Regular Commuters (n / %) | |
|------------------------------------|-----------------|-------------|------------------|------------|---------------------------|-----|
| | n | % | n | % | n | % |
| Thameslink | 1,064 | 100% | 546 | 51% | 235 | 22% |
| Southern | 1,417 | 100% | 684 | 48% | 383 | 27% |
| Southeastern | 1,088 | 100% | 521 | 48% | 303 | 28% |
| Gatwick Express | 462 | 100% | 226 | 49% | 65 | 14% |
| South East Quadrant Overall | 2,003 | 100% | 963 | 48% | | |

Numbers of respondents by age and gender

| | 16-24 | | 25-34 | | 35-44 | | 45-54 | | 55-64 | | 65+* | | Prefer not to say | |
|------------------------------------|-----------|-----------|------------|-----------|------------|------------|------------|------------|------------|------------|------------|------------|-------------------|-----------|
| Thameslink | 13 | 1% | 100 | 9% | 192 | 18% | 285 | 27% | 342 | 32% | 122 | 11% | 10 | 1% |
| Southern | 18 | 1% | 128 | 9% | 258 | 18% | 361 | 25% | 451 | 32% | 181 | 13% | 20 | 1% |
| Southeastern | 14 | 1% | 88 | 8% | 183 | 17% | 270 | 25% | 362 | 33% | 155 | 14% | 16 | 1% |
| Gatwick Express | 9 | 2% | 50 | 11% | 85 | 18% | 128 | 28% | 143 | 31% | 41 | 9% | 6 | 1% |
| South East Quadrant Overall | 26 | 1% | 174 | 9% | 347 | 17% | 517 | 26% | 655 | 33% | 257 | 13% | 27 | 1% |

| | Male | | Female | | Prefer not to say | |
|------------------------------------|--------------|------------|------------|------------|-------------------|-----------|
| Thameslink | 661 | 62% | 401 | 38% | 2 | - |
| Southern | 851 | 60% | 559 | 39% | 7 | 1% |
| Southeastern | 604 | 56% | 478 | 44% | 6 | 1% |
| Gatwick Express | 280 | 61% | 401 | 38% | 2 | - |
| South East Quadrant Overall | 1,156 | 58% | 837 | 42% | 10 | 1% |

*The age profile of respondents is skewed towards younger passengers as older members of the panel (those aged 60+) were being held for an alternative survey and were therefore not invited to respond to this survey